

OpenKM End User manual



OpenKM Document Management System End User Manual

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1. Introduction to the OpenKM Document Management System

OpenKM is a tool for the administration of documents and records generated within a company to improve access to the corporate environment and control the unnecessary duplication of information.

OpenKM provides a solution for

- Control the growing volume of information to be handled.
- End the diversification of information storage sources.
- Prevent duplication of information.
- Obtain valid information through document version control.
- Reduce the time and resources used in locating information.
- Avoid the leak of knowledge or the illicit access of users, thus complying with the obligations established in the LOPD (Data Protection Law) and the RGPD of the EU.
- Restrict access to information by unauthorized users.

Valuable and relevant information can be found in less time through the OpenKM System to solve problems and make decisions. OpenKM helps improve corporate processes, integrating everyday tasks (and interrelated tasks) in a single tool and allowing the organization's different departments controlled and supervised access to information.

This course shows all the functionalities useful for an end-user of OpenKM used as a document management system. The provision of available functionalities is linked to the profile assigned to each user. Profiles are managed from the administration panel.

1.2. System access and user interface

Access to the System is done through the web browser using the URL that corresponds to your OpenKM installation. In this access screen, you must enter the username (login) and the password that the teacher has provided. You can also select the language you want.



The image shows the OpenKM login interface. At the top is the OpenKM logo with the text 'KnowledgeManagement'. Below the logo are three input fields: 'User' (with a person icon), 'Password' (with a lock icon), and 'Language' (with a dropdown arrow and 'English' selected). At the bottom is a blue 'Sign In' button.

Fig.1

When accessing the interface, we can find different sections and options within the System that we will explain in more detail below.

1.2. Work areas

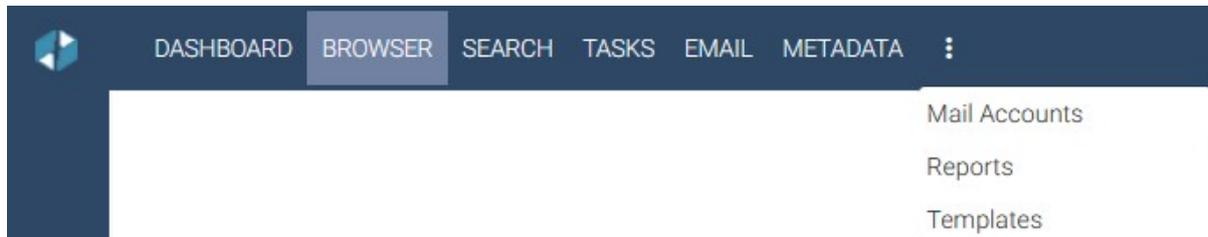


Fig. 2

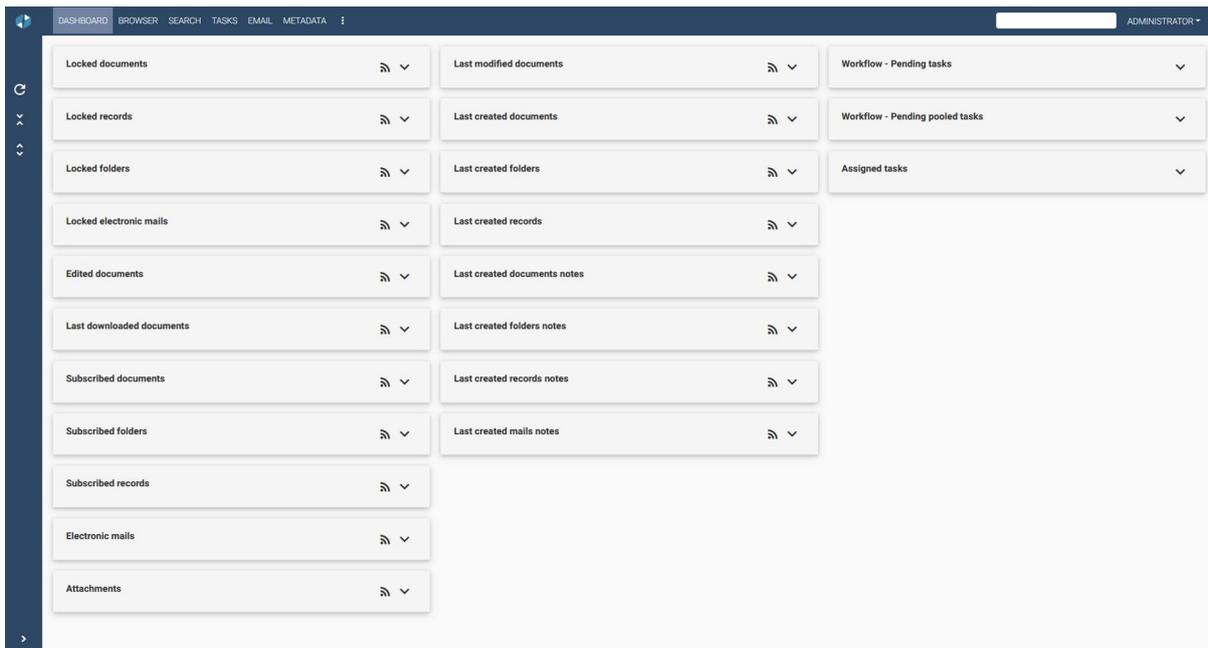
The OpenKM document management system is organized into several work areas: Board, Explorer, Search Engine, Task Manager, Mail, and Metadata. At the points, we have access to more options: Email accounts, Reports, Templates, and other extra features that may be part of the document management system configuration.

Concerning the Templates, namely that in OpenKM new documents, folder structures, and records can be created based on models saved in said section. In this way, users can create new content, respecting the controlled creation of new nodes, to which more attributes can be added, such as keywords, categories, or group properties, linked to the templates.

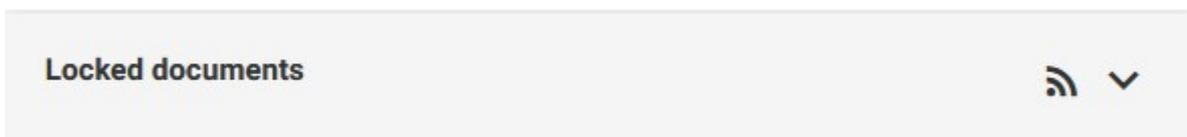
The administrator can make the area most used by the user appear by default. We will start by analyzing the Explorer area, the work area in which users tend to carry out most of the tasks related to document management.

1.2.1 Dashboard

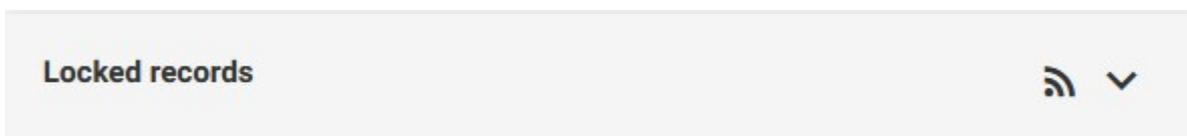
The Dashboard area shows a synthesized view of everything that happens in OpenKM. The user will see the indicators of their activity at the individual and group level linked to their user profile in OpenKM.



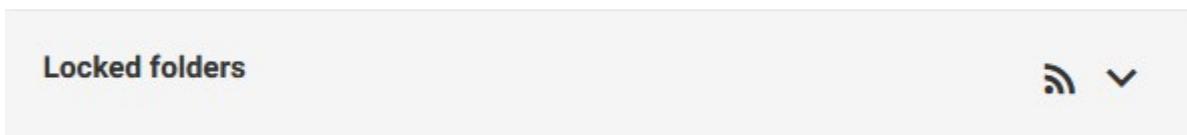
Below, we outline the most common activity indicators



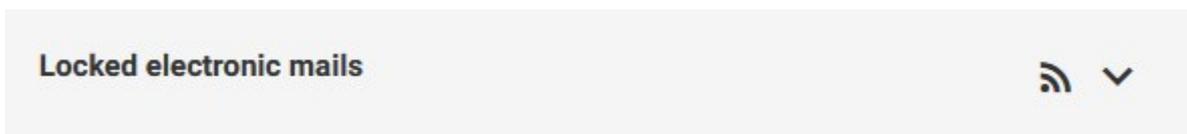
Displays the list of blocked documents. In this status, documents cannot be edited in any way.



Displays the list of blocked electronic records. In this state, records cannot be edited in any way.



Displays the list of locked folders. In state, folders cannot be edited in any way.



Displays the list of blocked emails. In status, e-mails cannot be edited in any way.

Edited documents



Displays the list of documents in the edit state. In this status, the documents are locked for the rest of the users who do not participate in the editing of the file.

Last downloaded documents



This indicator informs about the latest files downloaded from OpenKM

Subscribed documents



Displays the list of documents on which the user has used the subscription functionality.

Subscribed folders



Displays the list of documents on which the user uses the subscription functionality.

Subscribed records



Displays the list of electronic records on which the user uses the subscription functionality.

Electronic mails



Display the latest emails in OpenKM

Attachments



Displays the list of files attached to emails in OpenKM.

Last modified documents



Shows the list of the latest documents published in OpenKM

Last created documents



Displays the list of the latest documents created in the system

Last created folders



Displays the list of the latest folders created in OpenKM

Last created records



Displays the list of the latest electronic records created in the system

Last created documents notes



Displays the list of the latest annotations added to documents

Last created mails notes



Displays the list of the latest annotations added to folders

Last created records notes



Displays the list of the latest annotations added to electronic records

Last created mails notes



Displays the list of the latest annotations added to emails

Workflow - Pending tasks



Displays the list of workflows assigned to the user in pending status

Workflow - Pending pooled tasks



Displays the list of workflows in pending status that have not been assigned to a specific user

Assigned tasks



Displays the list of tasks registered in the OpenKM Task Manager assigned to the user

1.2.2 Browser Area

When accessing the System, the explorer area is displayed with different well-defined sections: Work Areas, Information Sections, Toolbars, Document Browser, and Properties Panel, in addition to the information of the user who is connected at that moment.

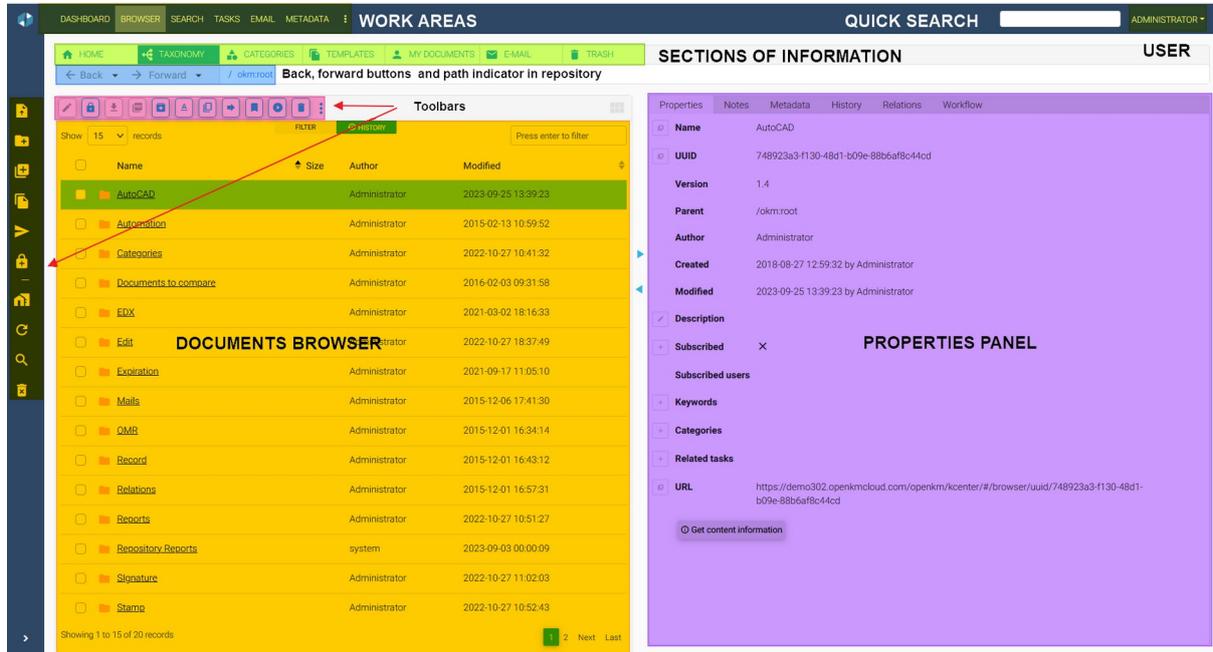


Fig. 3

Video tutorial: <https://academy.openkm.com/mod/resource/view.php?id=440>

1.2.2.1 Contextual Menu

Clicking with the right mouse button on content in the taxonomy, we will see the drop-down menus with their different options. If a menu option is grayed out, this option is not available.

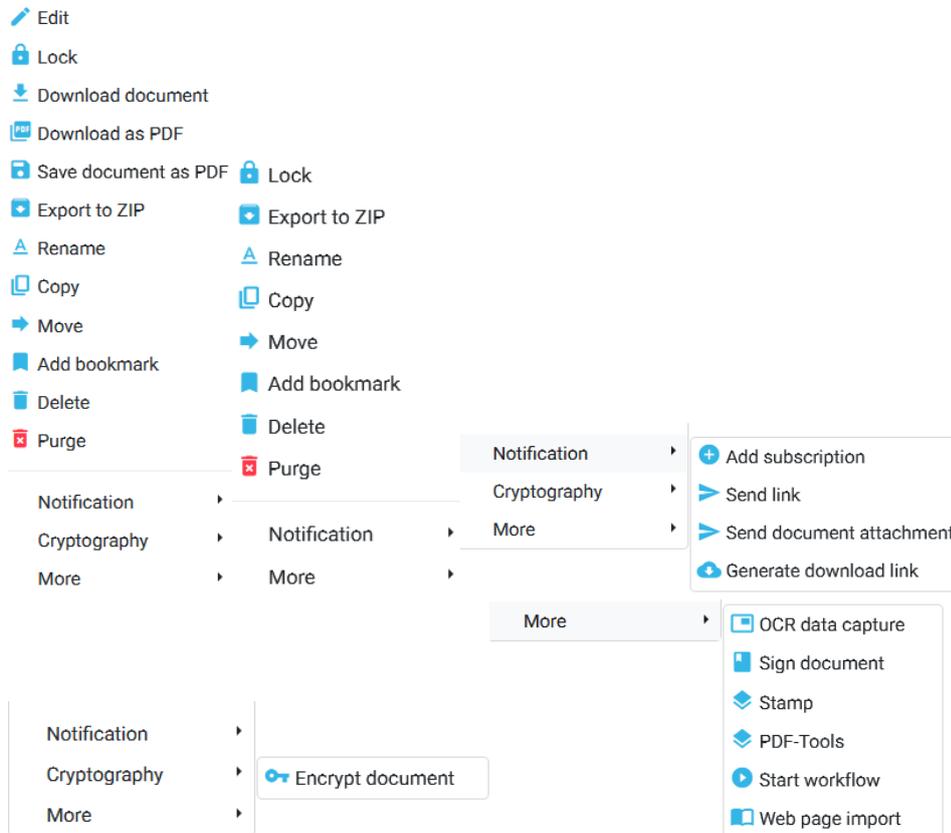


Fig. 4: context menus

-  → Edit a document
-  → Block
-  → Download a document
-  → Download a document as a pdf
-  → Save a document as a pdf
-  → Export contents in ZIP format
-  → Rename
-  → Copy
-  → Move
-  → Add a bookmark
-  → Delete
-  → Purge
-  → Add subscription service
-  → Send link
-  → Send attached document
-  → Generate download link
-  → Encrypt document
-  → data capture (OCR)
-  → sign a document
-  → stamp a document
-  → PDF Toolkit

 → Start workflow

 → Import web page

1.2.3 Toolbars

The Toolbar is made up of buttons with the main functions that the user will use most frequently. Like the menu bar, buttons are occasionally grayed out, meaning they are unavailable.

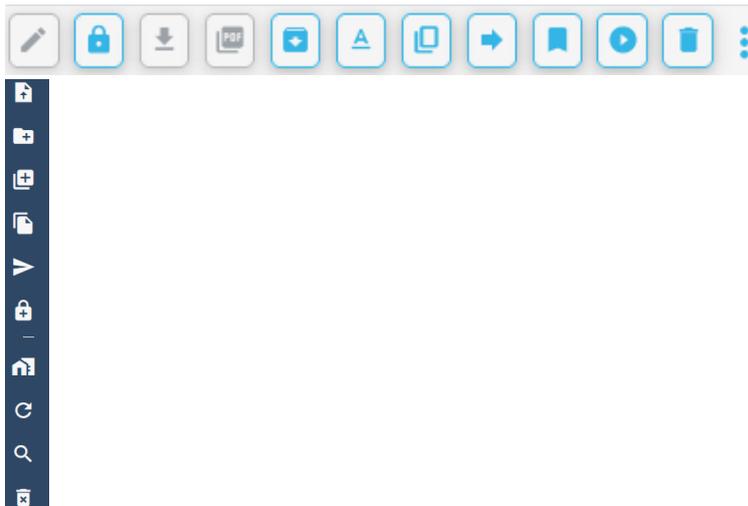


Fig. 5: Toolbars

Detail of the functions according to their icons:

-  → Edit a document
-  → Block
-  → Download a document
-  → Download document in PDF format
-  → Export in ZIP format
-  → Rename
-  → Copy
-  → Move
-  → Add bookmark
-  → Start workflow
-  → Delete

Points  give access to more features, which are available from context menus.

 → Add document

 → Create folder

 → Add record

-  → Create from template
-  → Compose email
-  → Upload encrypted document
-  → Go home
-  → Refresh
-  → Quick search
-  → Empty Trash

1.2.4 Meaning of each work area

Workspaces allow you to switch between searching and listing folders and documents.



Fig.5

There are four tabs to allow the four working modes:

- **Board:** Mode to access the workflow, the view of user documents, the general view of documents, and the news push service, among other features.
- **Explorer:** Mode to complete the main tasks with folders, records, and their documents (create, add, move, download, etc.).
- **Search:** Mode to search for documents.
- **Tasks:** task manager to manage events.
- **Email:** file mode and email management
- **Metadata:** way to work with the group properties of the contents housed in the document manager.
- **Administration:** Administration Utilities; only available for users with "okmAdmin" privileges.

1.2.5 Route

The path permanently indicates your location within the folder tree.



Fig 6

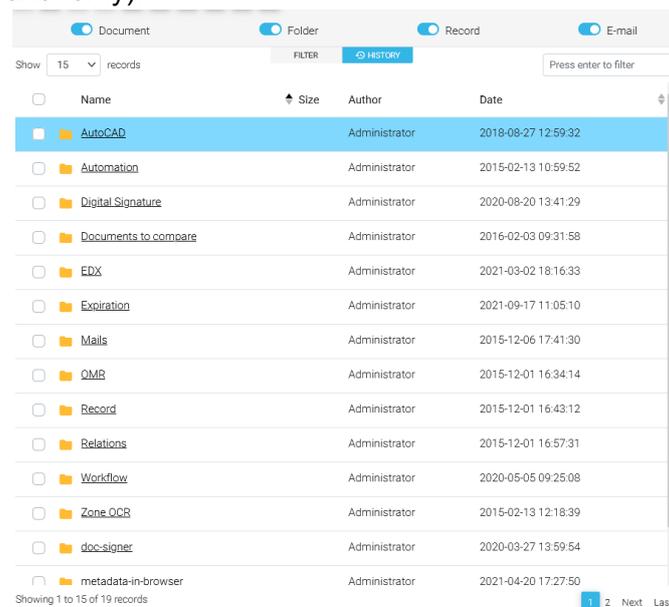
1.2.6 Taxonomy (folder tree)

First, there is the Folder Tree or also called Taxonomy. This shows a view of the repository layout grouped by folders. There are several types of folders symbolized by the following icons:

-  → Folder. It may contain subfolders.
-  → The folder is read-only. May contain subfolders.
-  → You are subscribed to the folder.
-  → You are subscribed to the folder is read-only.

1.2.7 Document's Browser

The document browser allows you to view the list of documents and folders available in a specific tree node (Taxonomy).



<input type="checkbox"/>	Name	Size	Author	Date
<input type="checkbox"/>	AutoCAD		Administrator	2018-08-27 12:59:32
<input type="checkbox"/>	Automation		Administrator	2015-02-13 10:59:52
<input type="checkbox"/>	Digital Signature		Administrator	2020-08-20 13:41:29
<input type="checkbox"/>	Documents to compare		Administrator	2016-02-03 09:31:58
<input type="checkbox"/>	EDX		Administrator	2021-03-02 18:16:33
<input type="checkbox"/>	Expiration		Administrator	2021-09-17 11:05:10
<input type="checkbox"/>	Mails		Administrator	2015-12-06 17:41:30
<input type="checkbox"/>	QMR		Administrator	2015-12-01 16:34:14
<input type="checkbox"/>	Record		Administrator	2015-12-01 16:43:12
<input type="checkbox"/>	Relations		Administrator	2015-12-01 16:57:31
<input type="checkbox"/>	Workflow		Administrator	2020-05-05 09:25:08
<input type="checkbox"/>	Zone OCR		Administrator	2015-02-13 12:18:39
<input type="checkbox"/>	doc-signer		Administrator	2020-03-27 13:59:54
<input type="checkbox"/>	metadata-in-browser		Administrator	2021-04-20 17:27:50

Fig.7

We can decide the number of results we display per page

Show records

Fig.8

The Filter Button shows the Document, Folder, Record, Email buttons, which allows us to discriminate by type of content in the taxonomy.

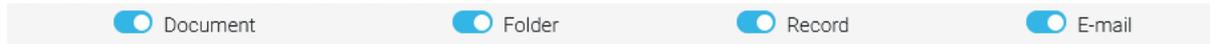


Fig.9

The History Button shows the routes we have navigated during the session. We can also decide how we preview the contents of the taxonomy.



By default

Consulting metadata sample

Fig.10

If we do nothing, the contents appear as a list (by default). However, we can also see them and the possible metadata assigned to them (Consulting metadata sample).

<input type="checkbox"/>	Name	Size	Author	Date	Input 1	Input 2
<input type="checkbox"/>	company-profile-sample.pdf	776.1 KB	Administrator	2021-04-20 17:28:45	company	pdf

Fig.11

There is also the option to see the thumbnails of the content hosted in the path of the repository that we are consulting.

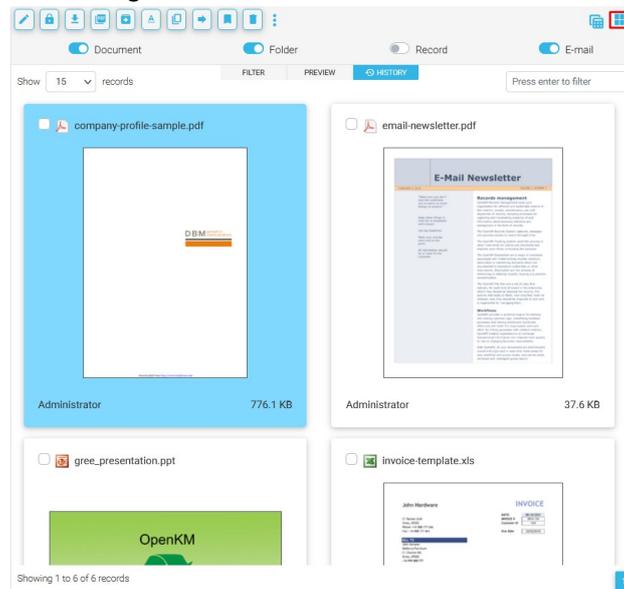


Fig.12

1.2.7 Properties panel

On the right, the properties of documents, folders, emails, and records are detailed with the general properties and specific properties related to the documents defined by the user (document parameterization).



Fig.13

Options available for folders, records, and emails:

- Properties tab
- Grades
- Security tab
- Relationships tab
- Activity log
- Workflow
- Property group tab (metadata)

Options available for documents:

- Properties tab
- Grades
- Security tab
- History (version control)
- Preview tab
- Relationships tab
- activity log
- workflow
- Extracted Text tab
- Property group tab (metadata)

1.3. Basic and specific operations with documents and folders

This section will show different operations through specific video tutorials for each task or management.

1.3.1 Explorer and management of folders and documents

Icon for Operation: 

Available in

- Vertical Toolbar of the Explorer Area.

Create folder

Path
/okm.root/metadata-in-browser

Name

Step into created node
 Off

CREATE **CANCEL**

Fig14

Tutorial video: <https://youtu.be/t4AFr2LbvWM>
(Press the shift key when clicking this link to generate a new window)

1.3.2 File upload

Available in

Vertical Toolbar of the explorer area

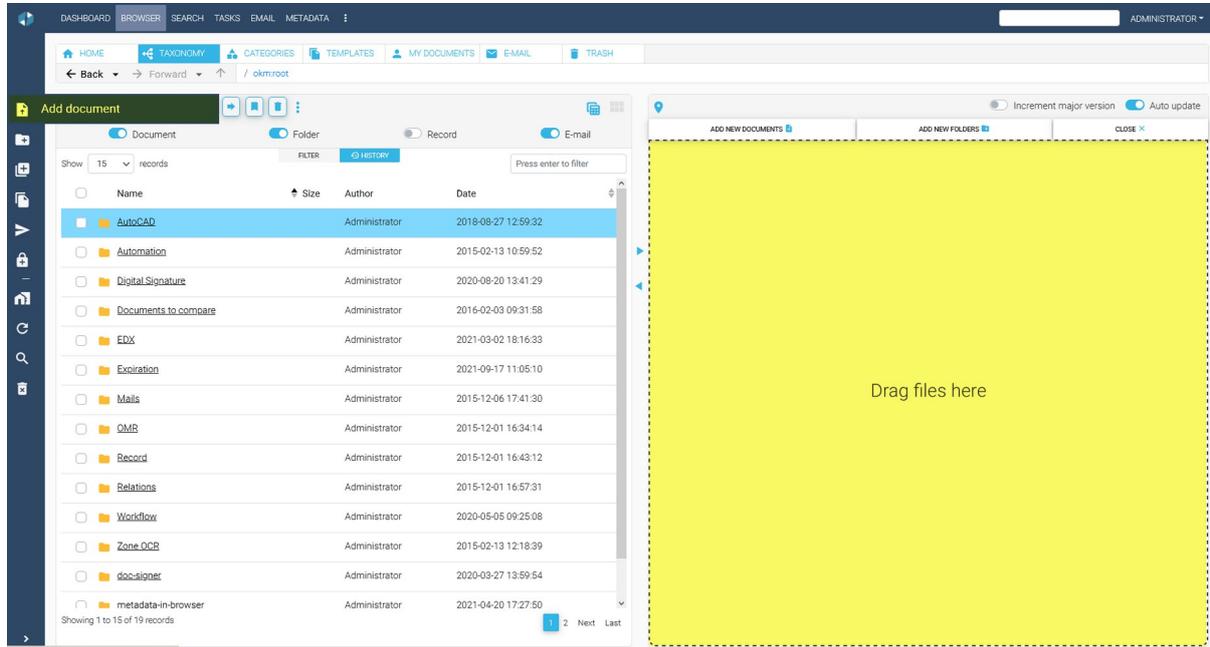


Fig15

By clicking on the "Add document" button, the System automatically enables the area where the user can drag the contents of their computer's desktop into OpenKM. They can be files, but they can also be folders. In the upper part of the drag zone, we can use the buttons "Insertion of documents" "Insertion of folders"; these buttons give the option of selecting the contents to upload to the document manager.

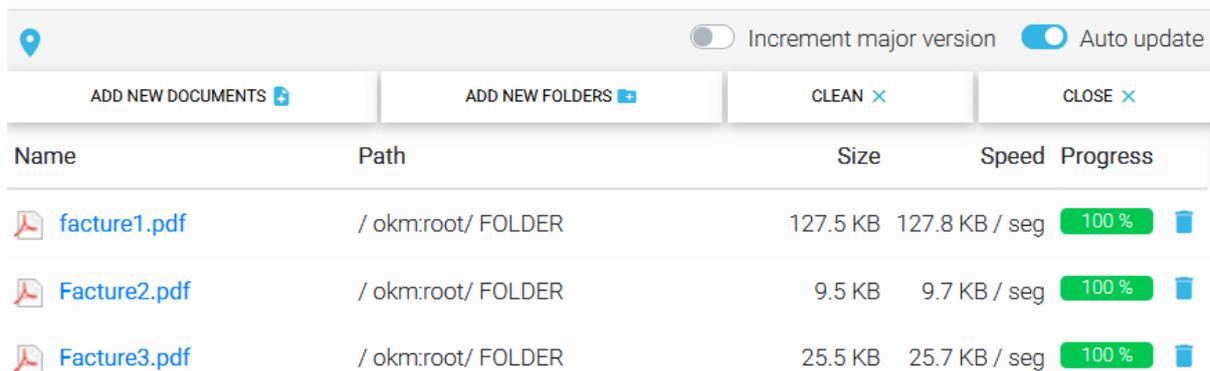


Fig16

We can see what content we have uploaded, the name, the path they are hosted, the size, speed, and % of progress. When we have finished the incorporation of new content, we can click on the "Close" button.

The "Increase major version" button gives us the possibility, as its name indicates, to increase the versioning of the incorporated file. It offers the opportunity of working with the documentation in different versions: 1.0, 1.1, but also 2.0, 2.1, etc.

Tutorial video: [grabado youtube o academy?](#)

(Press the shift key when clicking this link to generate a new window)

1.3.3 Editing and downloading files

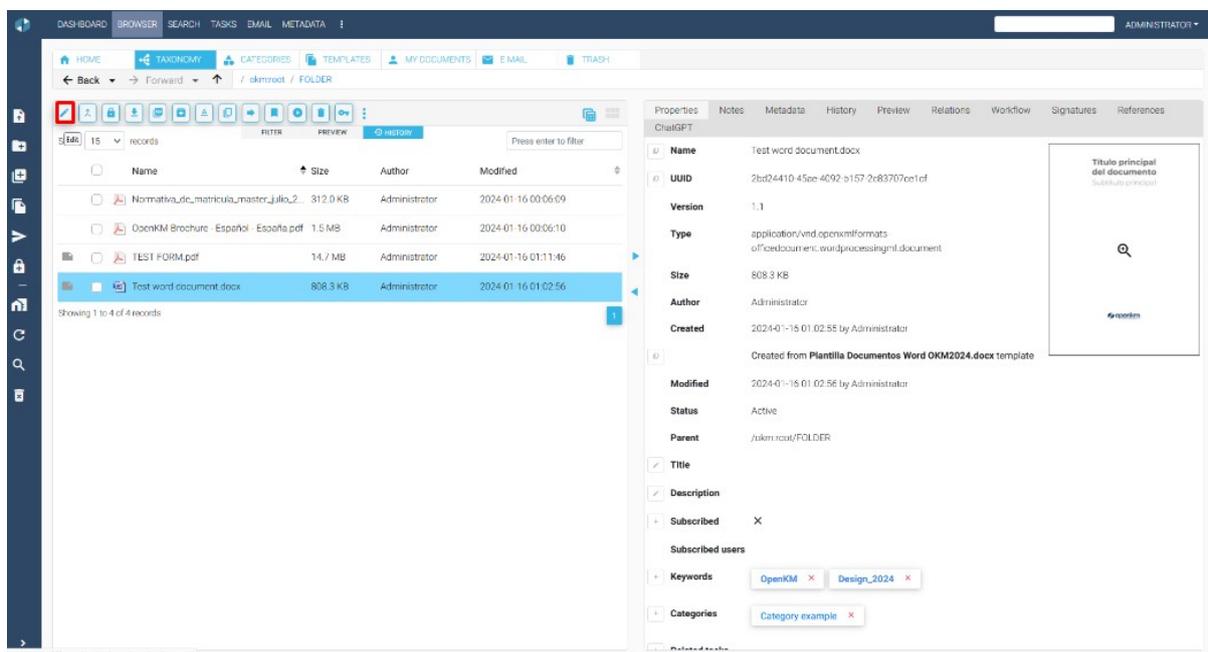
Operation icon:

Available in 

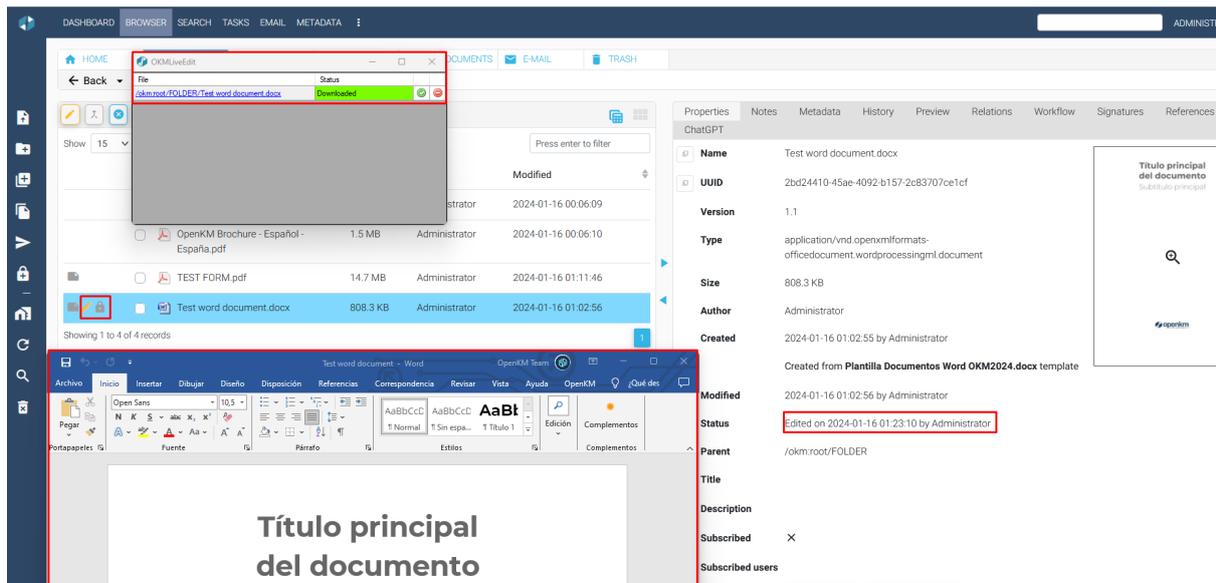
- Horizontal Toolbar of the Explorer area

1.3.3.1 OpenKM Live Edit

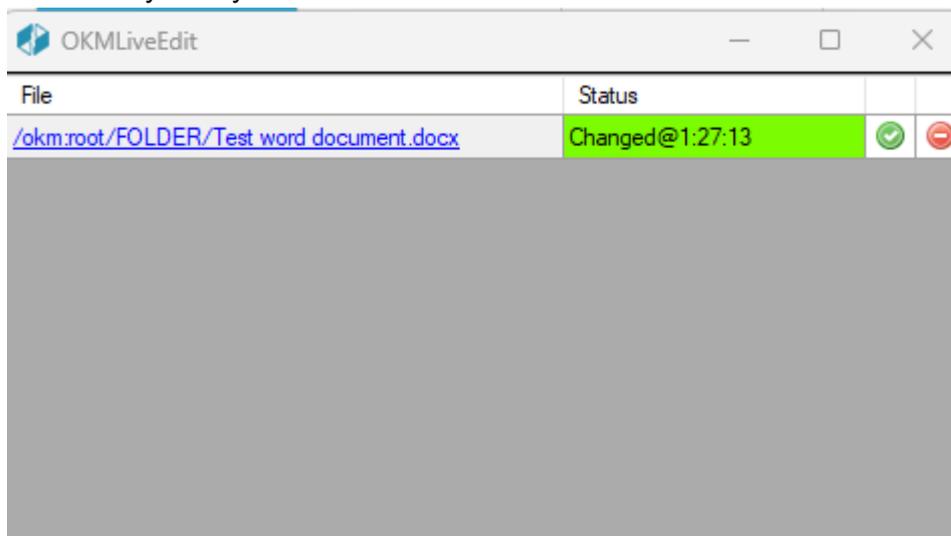
To edit a document in OpenKM, select the file and click on the Edit feature available in the horizontal toolbar



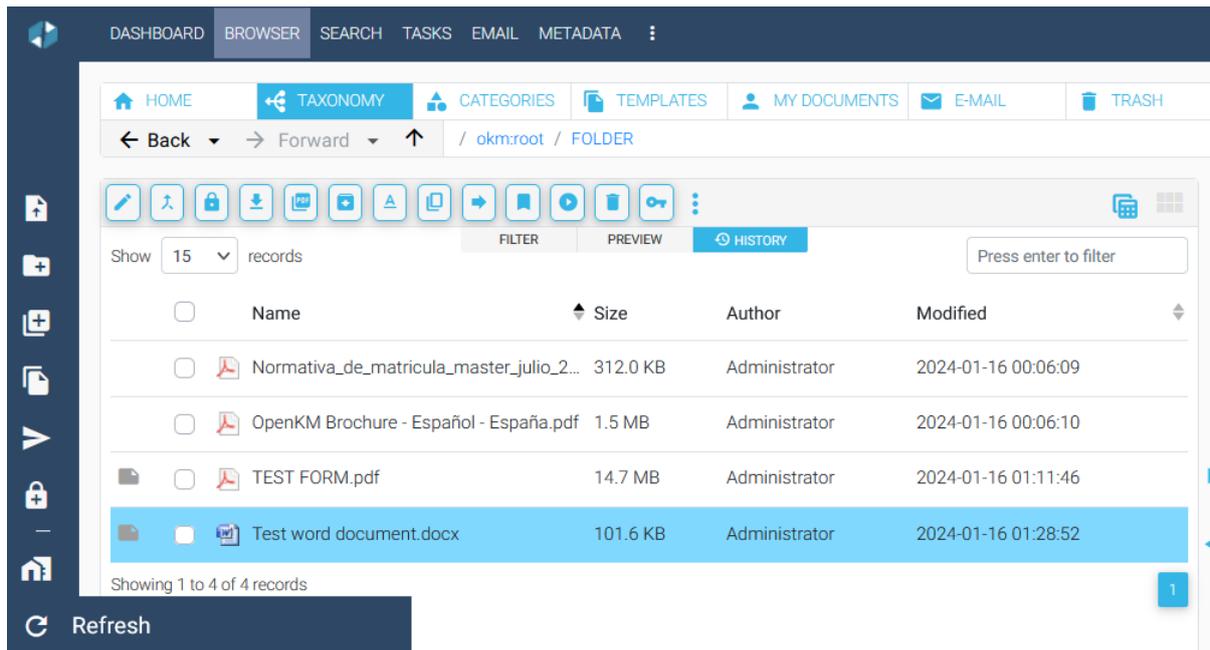
OpenKM includes the OKM Live Edit, which opens the file in edit format with the corresponding application (in the MS Word example). With OpenKM Live Edit the document is protected against overwriting (that's why it's locked)



The user can save the changes they make as they work on the file. Such changes will be detected by the system.



When the user wants to save the new version of the document, he must close the file and click on the green OKMLiveEdit sales button. If you click on the Refresh button



You will see the new version of the document saved. And the document's status will return to its Active status.

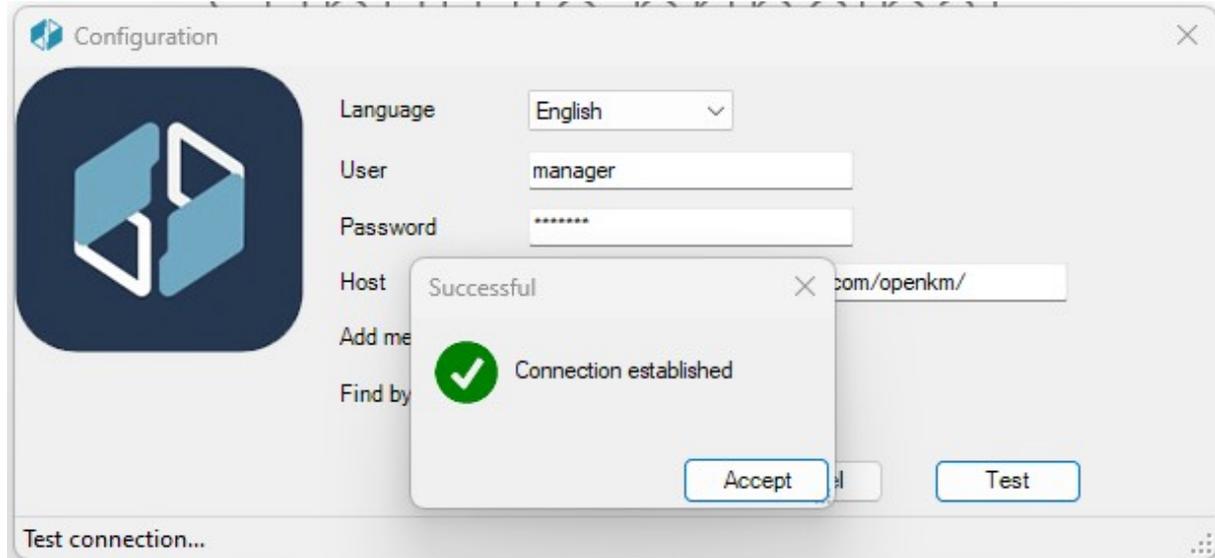
To learn more about OpenKM Live Edit, go to the [documentation](#)

1.3.3.2 Microsoft Addin

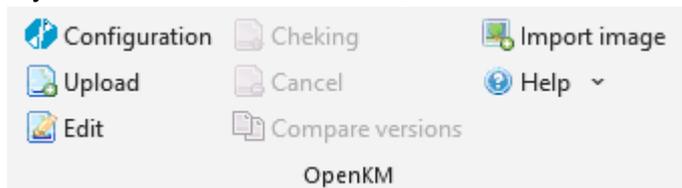
Open the document with MS Word. Among the menus on the toolbar, you'll find the OpenKM MsAddin for Word.



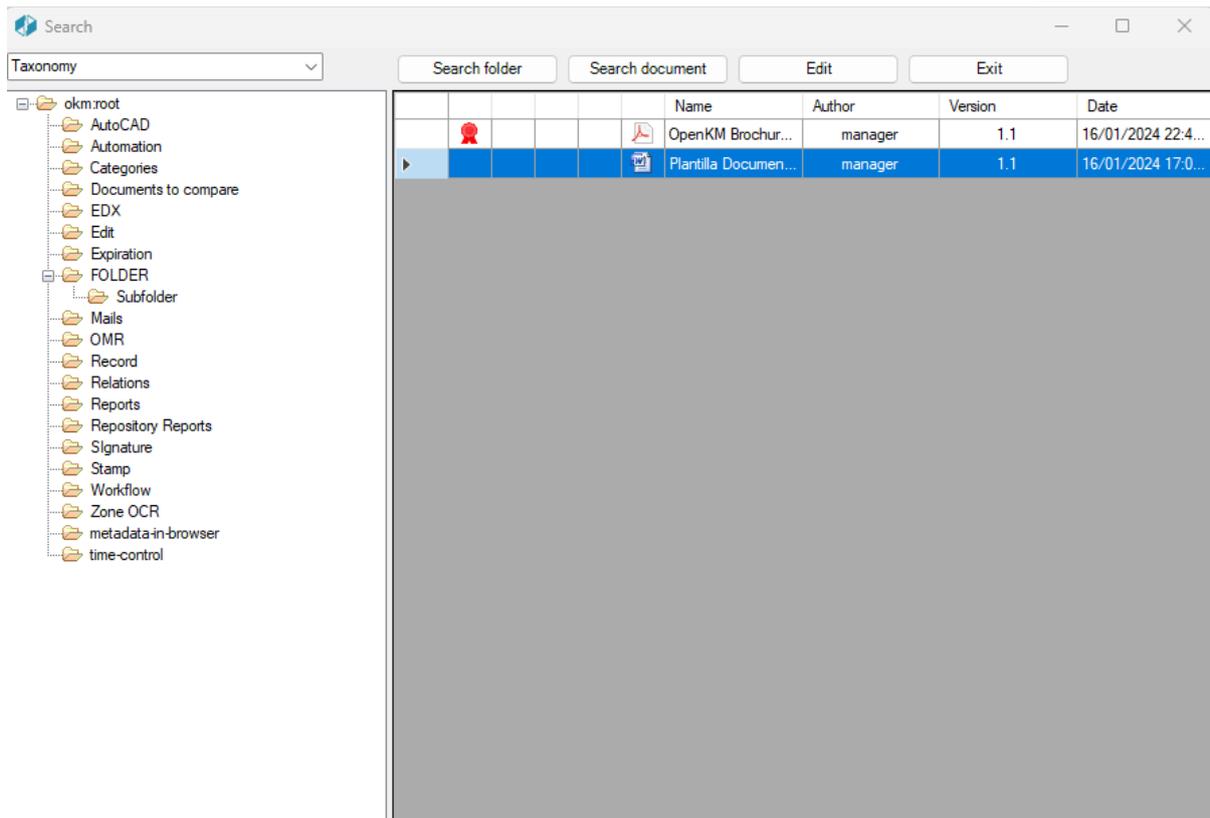
In Configuration we can check if the connection with OpenKM is correct



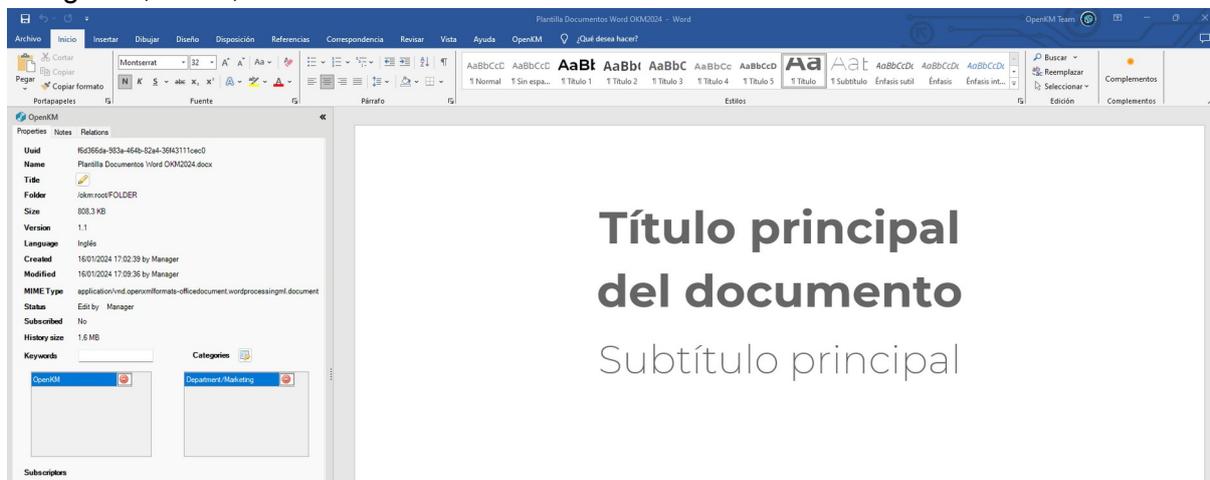
If you want to edit a document, click on the Edit button



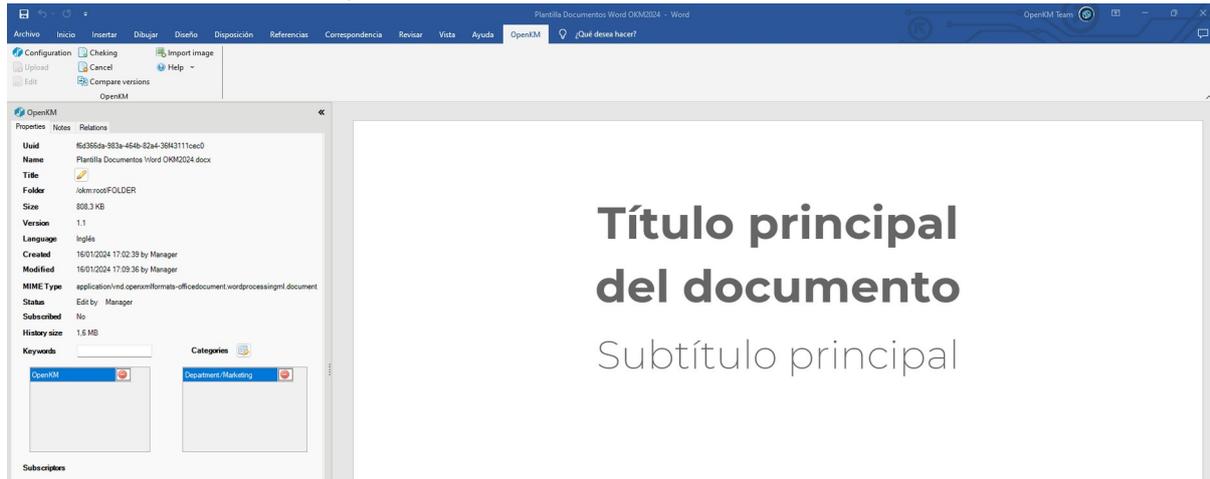
Automatically, a pop-up window will open in which we can select the context and within it, the file we want to edit.



This editing option allows you to access other OpenKM features such as keywords, categories, notes, and even metadata.



Once all the desired changes have been made, click on the check-in button.



Otherwise, we will click on the cancel button.

This option also protects edit jobs from overwriting. But there is an option that allows simultaneous editing.

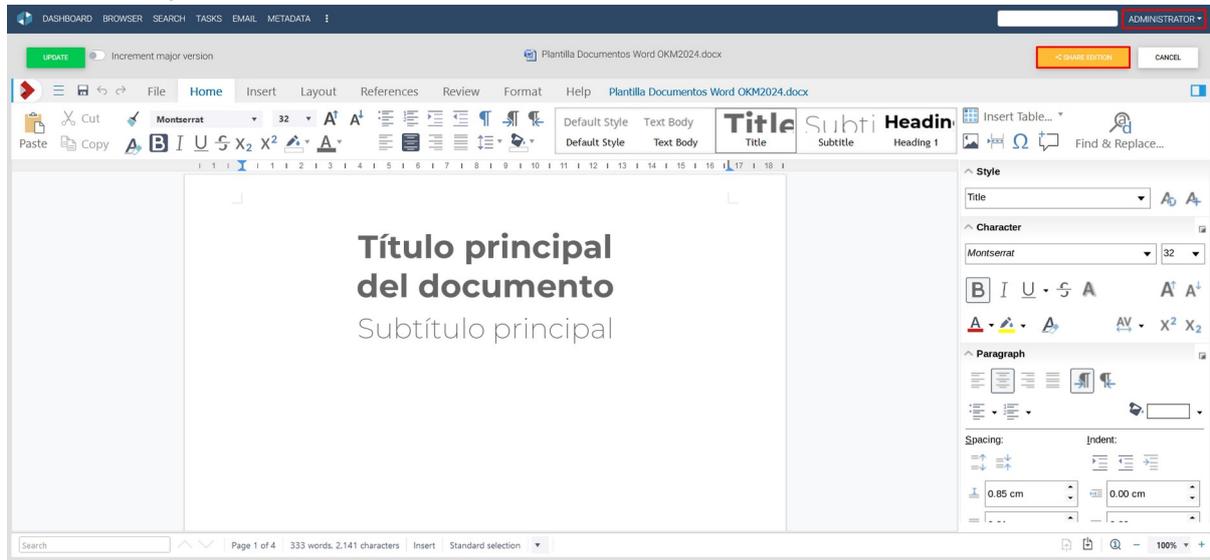
For more information on OpenKM MS Addins, go to the [documentation](#)

1.3.3.4 Online Editor

With OpenKM's Online Editor, several users can edit a file synchronically, while viewing the changes made by the collaborator.

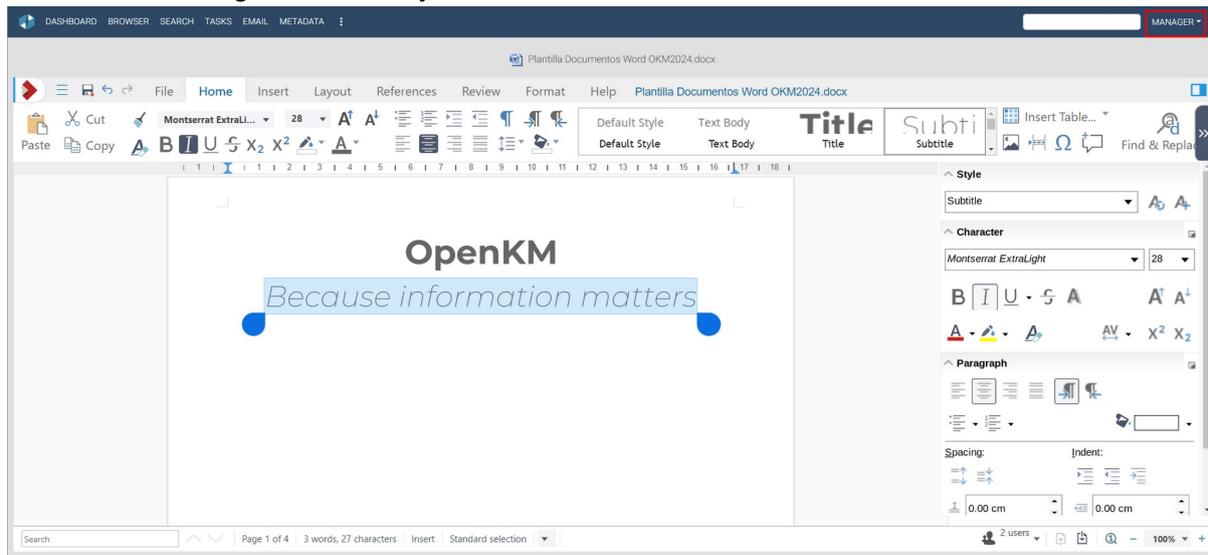
To do this, you need to open the document in edit mode.

Automatically, the file will open within the editor, hosted on OpenKM.



To allow another user to edit at the same time. The user responsible for editing clicks on the "share edition" button. This button generates a link that gives direct access to the document,

which will open in edit mode. From that moment on, both users will see the other connected and see the changes inserted by the other.



The user responsible for editing is in charge of saving or not saving the new version of the document.

For more information about the Online Editor, go to the [documentation](#)

Tutorial video: <https://youtu.be/psSP3qeKh94?feature=shared>

(Press the shift key when clicking this link to generate a new window)

1.3.4 Assigning keywords, categories, and metadata to a document

In the Properties Panel of the Document Properties tab, you can add and modify keywords. To optimize the indexing and future search of information in the document management system, it is necessary to add keywords that describe and identify the stored file.

Although metadata is superior to keywords in the DMS parameterization by metadata (group properties), more straightforward installations, tend not to use metadata, and keywords in these environments are a good substitute.

The insertion of categories also helps to improve navigation through the repository, using the assignment of this attribute to the contents. (We can add keywords, categories, and metadata also to folders, records, and emails).

Adding or removing keywords or categories does not change the version of the document. And these attributes can be added voluntarily by users or be part of automatisms.

Automatism is an Open KM functionality that allows implementation within the document management system, a business process defined by the succession of actions carried out on a content (insertion of keywords, assignment of categories, metadata groups, etc.). In this

way, the system guides the user in fulfilling these conditions, which the archive must comply with to guarantee correct document management within the entity.

1.3.4.1 How to assign keywords

To assign keywords to a document, in the properties tab of the document properties panel, you will find the option

 **Keywords**

Clicking on the + button opens a pop-up window where we can insert the keyword, clicking on the "Add" button



You can add as many keywords as you want. If you want to delete a keyword, click on the red cross

 **Keywords** 

1.3.4.2 How to assign categories

To assign categories to a document, in the properties tab of the document properties panel, you will find the option

 **Categories**

Clicking on the + button opens a pop-up window where you can select the category you want to add

Add category

Search | Navigation

marketing

Path

 /okm.categories/Department/Marketing	<input type="radio"/>
--	-----------------------

Showing 1 to 1 of 1 records

If we know what the category is called, we can use the search engine. We can also use the browser:

Add category

Search | Navigation

/ okm.categories / Department

Path

 <u>Board</u>	<input type="radio"/>
 <u>Human resources</u>	<input type="radio"/>
 <u>II</u>	<input type="radio"/>
 <u>Management</u>	<input type="radio"/>
 <u>Marketing</u>	<input type="radio"/>
 <u>Secretary</u>	<input type="radio"/>

Showing 1 to 6 of 6 records

To see how to create categories (see Categories section)

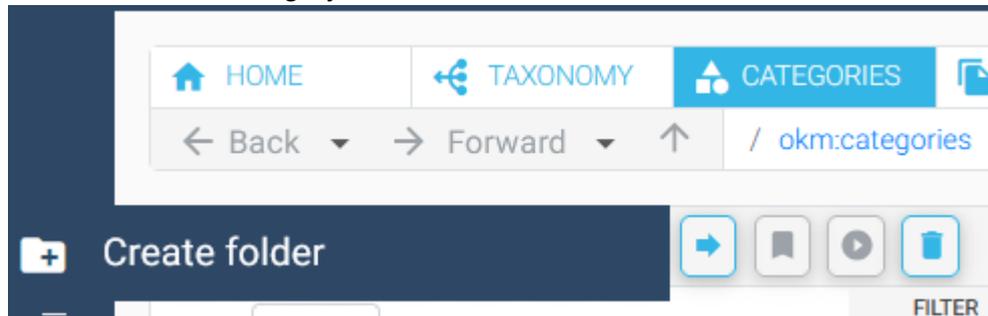
Categories

Categories section

The categories section allows us to conceptually navigate the repository. For example: the taxonomy can be sorted in alphabetical order, but in successive folders and subfolders you

can store files that share certain characteristics: departmental mapping, document type, geographical mapping

To create a new category we select the



In the pop-up window, enter the name of the new category

Create folder

Path
/okm:categories

Name

Step into created node

Off

CREATE **CANCEL**

By clicking on the "Create" button we see how the new category is added to the list of available categories

HOME TAXONOMY CATEGORIES TEMPLATES MY DOCUMENTS E-MAIL TRASH

Back Forward / okm:categories

Show 15 records FILTER HISTORY Press enter to filter

<input type="checkbox"/>	Name	Size	Author	Modified
<input checked="" type="checkbox"/>	Category example		Administrator	2024-01-16 00:29:38
<input type="checkbox"/>	Department		Administrator	2015-02-13 10:15:45
<input type="checkbox"/>	Document type		Administrator	2015-02-13 10:09:00
<input type="checkbox"/>	Region		Administrator	2015-02-13 10:07:23

Showing 1 to 4 of 4 records

Templates section

In OpenKM you can save preset layouts of documents, folder structures, emails, and electronic records

To create a new template, for example, a document template, in the templates section, click on the "add document" option

DASHBOARD BROWSER SEARCH TASKS EMAIL METADATA

HOME TAXONOMY CATEGORIES TEMPLATES MY DOCUMENTS E-MAIL TRASH

Back Forward / okm:templates / documents

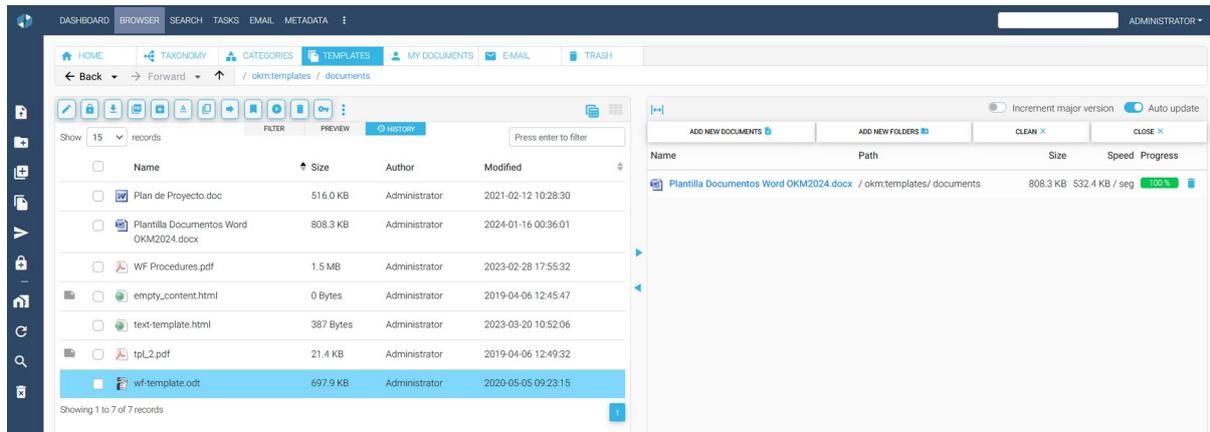
Add document FILTER PREVIEW HISTORY Press enter to filter

Show 15 records

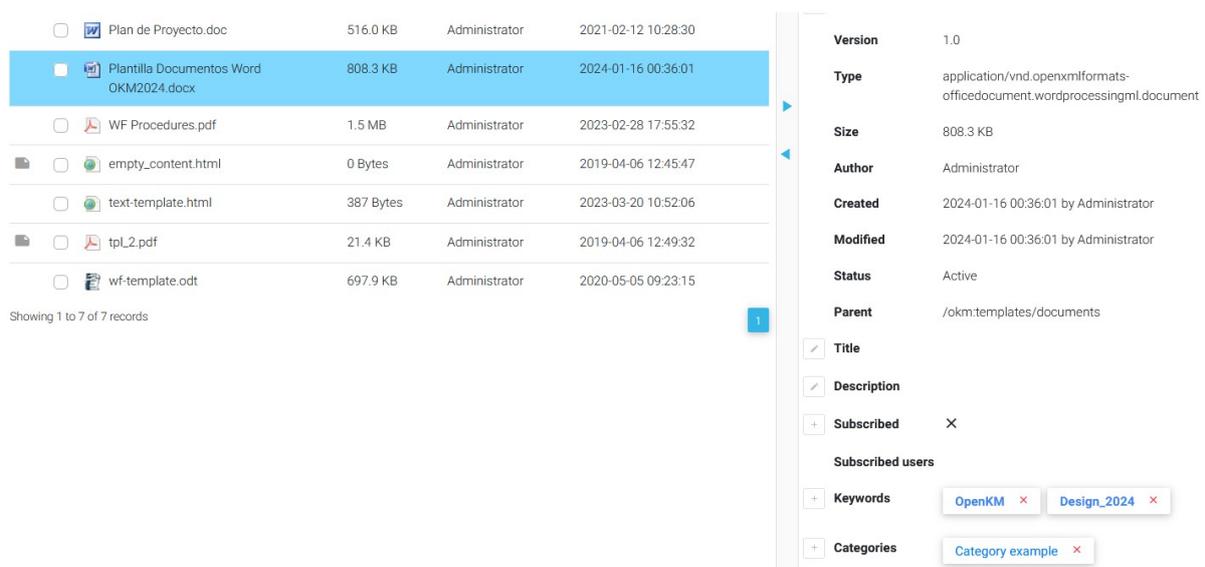
<input type="checkbox"/>	Name	Size	Author	Modified
<input type="checkbox"/>	Plan de Proyecto.doc	516.0 KB	Administrator	2021-02-12 10:28:30
<input type="checkbox"/>	WF Procedures.pdf	1.5 MB	Administrator	2023-02-28 17:55:32
<input type="checkbox"/>	empty_content.html	0 Bytes	Administrator	2019-04-06 12:45:47
<input type="checkbox"/>	text-template.html	387 Bytes	Administrator	2023-03-20 10:52:06
<input type="checkbox"/>	tpl2.pdf	21.4 KB	Administrator	2019-04-06 12:49:32
<input checked="" type="checkbox"/>	wf-template.odt	697.9 KB	Administrator	2020-05-05 09:23:15

Showing 1 to 6 of 6 records

The drag & drop option will appear, but you'll also have the option to select the document from your computer's document browser.



Templates can feature more attributes such as keywords, notes, categories, or metadata. A metadata is a piece of data that provides information about another piece of data. In general, metadata is presented in the form of metadata groups (also called Group Properties) that bring together different metadata formats (such as select, insert, calendar, etc.) depending on the design of the metadata group.



The process for creating folder, email, and electronic record structures is similar

DASHBOARD BROWSER SEARCH TASKS EMAIL METADATA

HOME TAXONOMY CATEGORIES TEMPLATES

Back Forward / okm:templates / folders

CREATE FOLDER

EDIT LOCK DOWNLOAD PDF SHARE COPY PASTE HISTORY

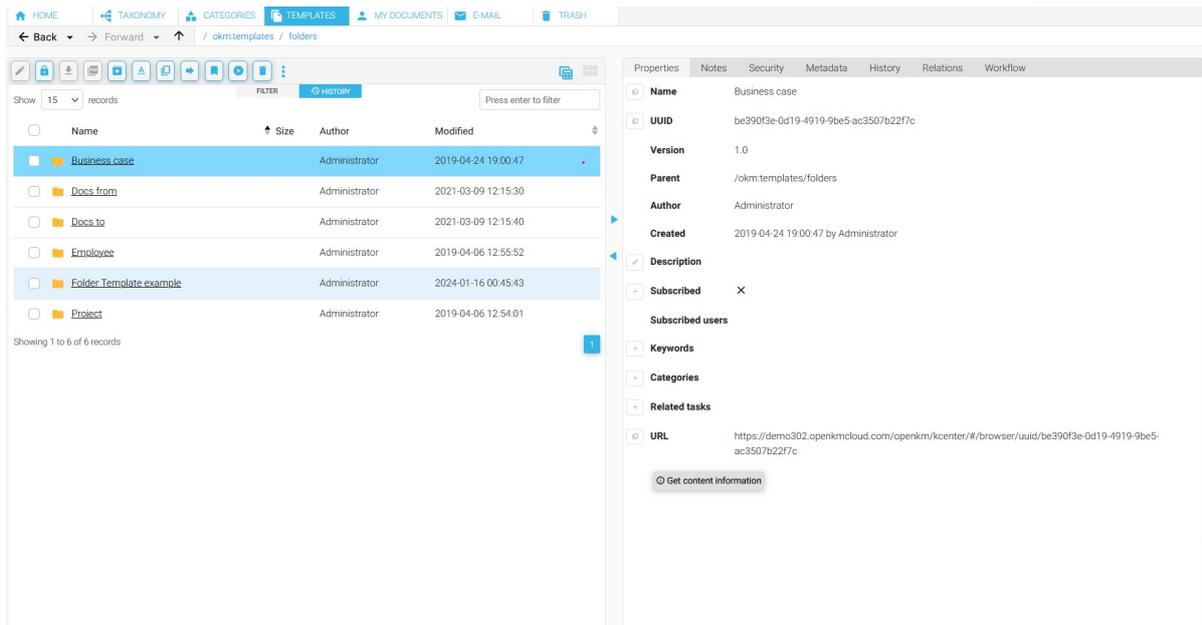
CREATE folder

Create folder

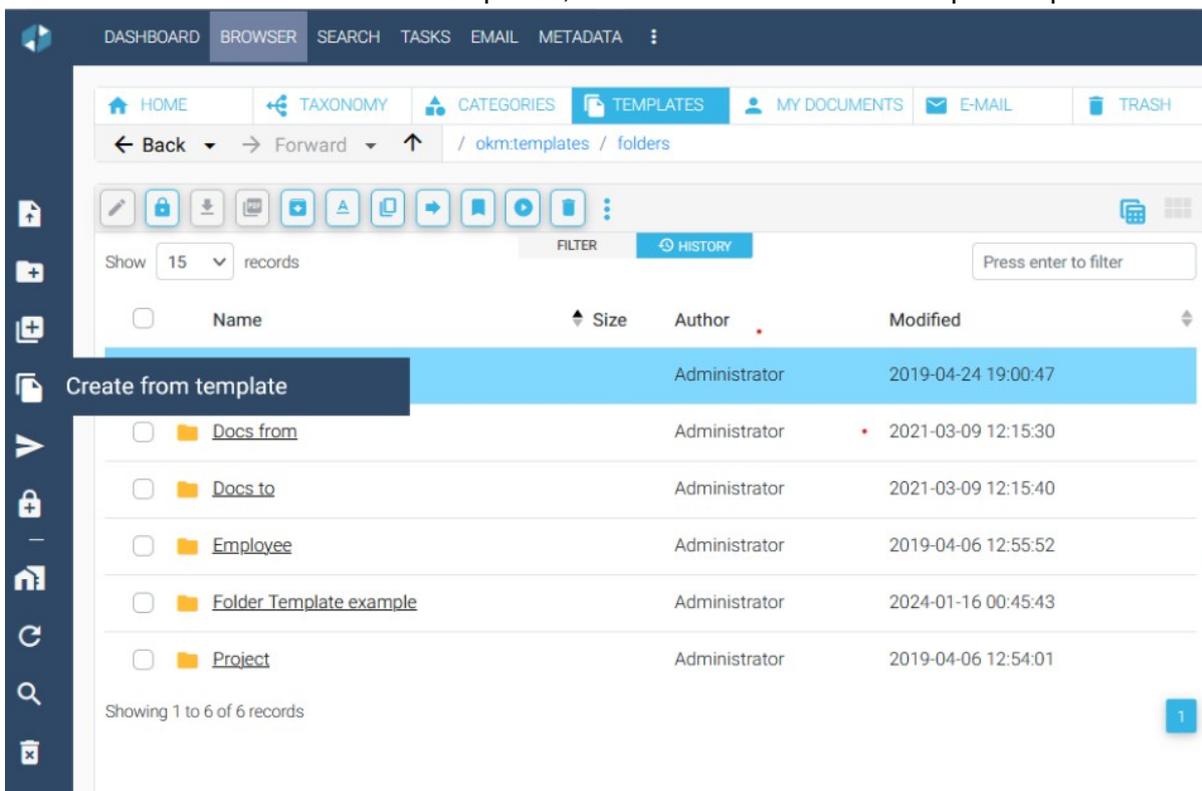
Path
/okm:templates/folders

Name

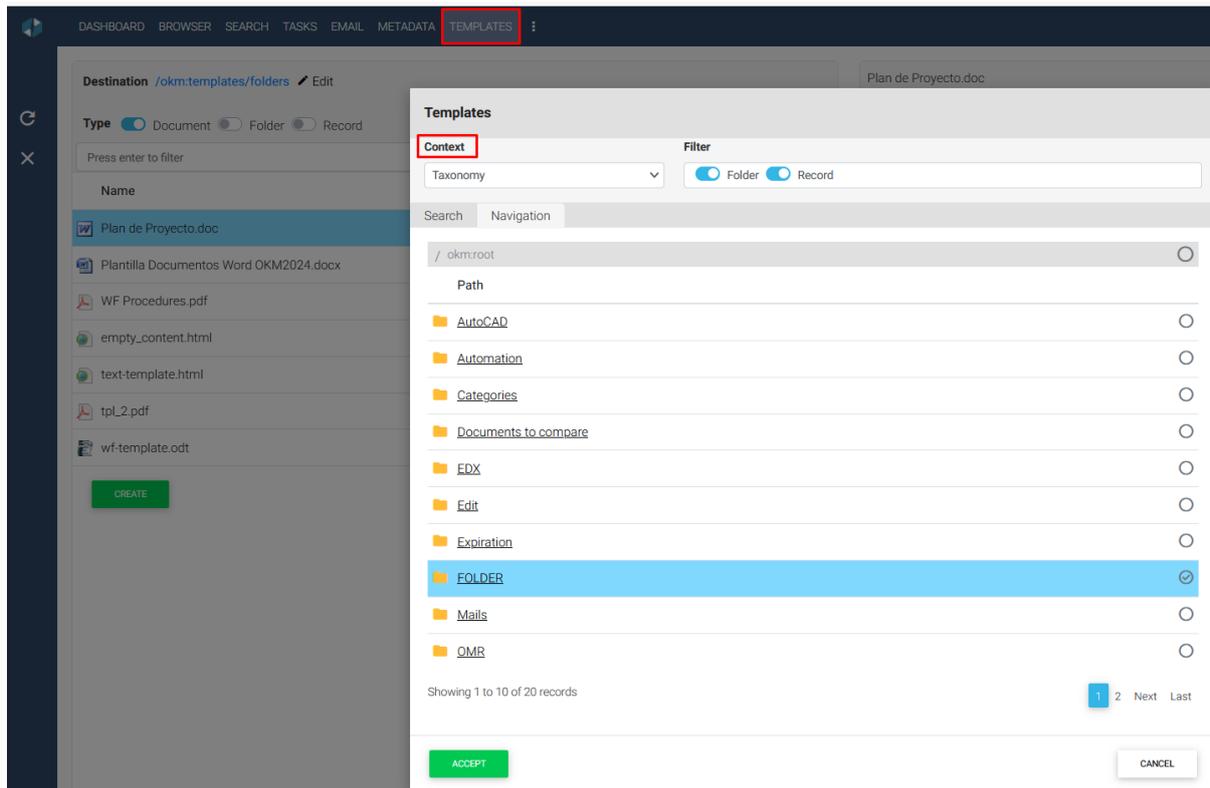
Step into created node
 Off



To create new content based on templates, click on the "create from template" option

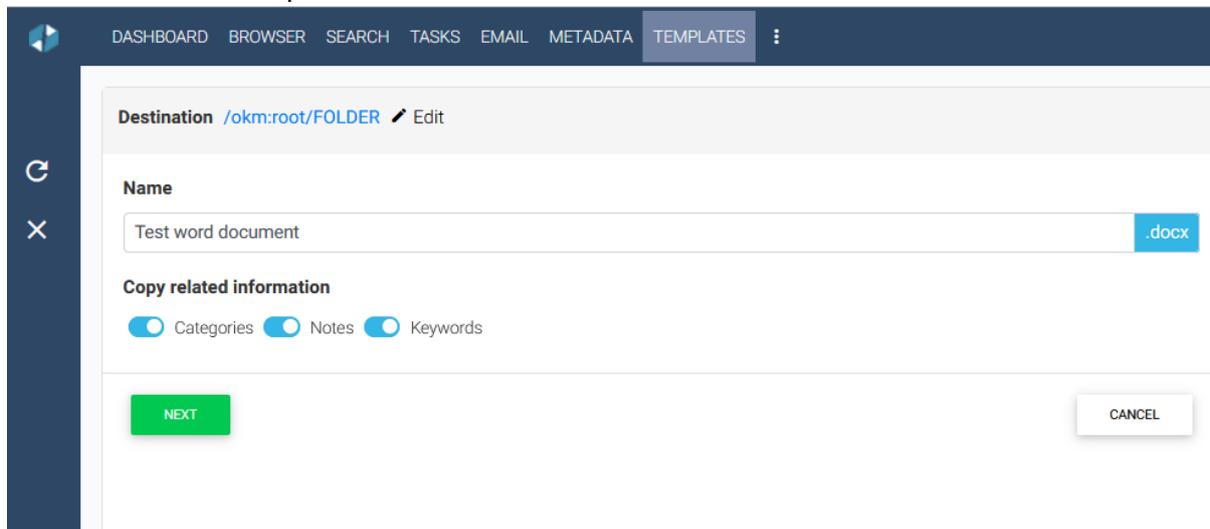


A new workspace dedicated to the Templates menu opens



in which we can select the context in which we are going to create the new node (document, folder, email, electronic record) and the path within the context.

You'll also have the option to rename the content



and create it with the categories, keywords, template notes.

DASHBOARD BROWSER SEARCH TASKS EMAIL METADATA **TEMPLATES**

Created (1)

 /okm:root/FOLDER/Test word document.docx

Destination /okm:root/FOLDER  Edit

Type Document Folder Record

Press enter to filter 

Name

 Plan de Proyecto.doc

 **Plantilla Documentos Word OKM2024.docx**

DASHBOARD BROWSER SEARCH TASKS EMAIL METADATA

HOME TAXONOMY CATEGORIES TEMPLATES MY DOCUMENTS E-MAIL TRASH

Back Forward / okm:root / FOLDER

Show 15 records FILTER PREVIEW HISTORY

Name	Size	Author	Modified
 Normativa_de_matricula_master_julio_2...	312.0 KB	Administrator	2024-01-16 00:06:09
 OpenKM Brochure - Español - España.pdf	1.5 MB	Administrator	2024-01-16 00:06:10
 Test word document.docx	808.3 KB	Administrator	2024-01-16 01:02:56

Showing 1 to 3 of 3 records

Properties Notes Security Metadata History Preview

References ChatGPT

Name Test word document.docx

UUID 2bd24410-45ae-4092-b157-2c83707ce1cf

Version 1.1

Type application/vnd.openxmlformats-officedocument.wordprocessingml.document

Size 808.3 KB

Author Administrator

Created 2024-01-16 01:02:56 by Administrator

Created from Plantilla Documentos Word OKM2024.i

Modified 2024-01-16 01:02:56 by Administrator

Status Active

Parent /okm:root/FOLDER

Title

Description

Subscribed X

Subscribed users

Keywords OpenKM x Design_2024 x

Categories Category example x

Forms can be saved in templates. They are documents to which metadata is added, so that when a user selects that file, during the process of creating the new file, based on that template, the system will offer the fields for its completion

DASHBOARD BROWSER SEARCH TASKS EMAIL METADATA TEMPLATES ADMINISTRATOR

Created (1)

/okm:root/FOLDER/Test word document.docx

Destination /okm:root/FOLDER Edit

Type Document Folder Record

Press enter to filter

Name

- Plan de Proyecto.doc
- Plantilla Documentos Word OKM2024.docx
- WF Procedures.pdf
- empty_content.html
- text-template.html
- tpl_2.pdf**
- wf-template.odt

CREATE

tpl_2.pdf

1 de 1 Tamaño automático

Sample template form

Name

Birth Date

Language

DASHBOARD BROWSER SEARCH TASKS EMAIL METADATA TEMPLATES

Created (1)

/okm:root/FOLDER/Test word document.docx

Name TEST FORM.pdf

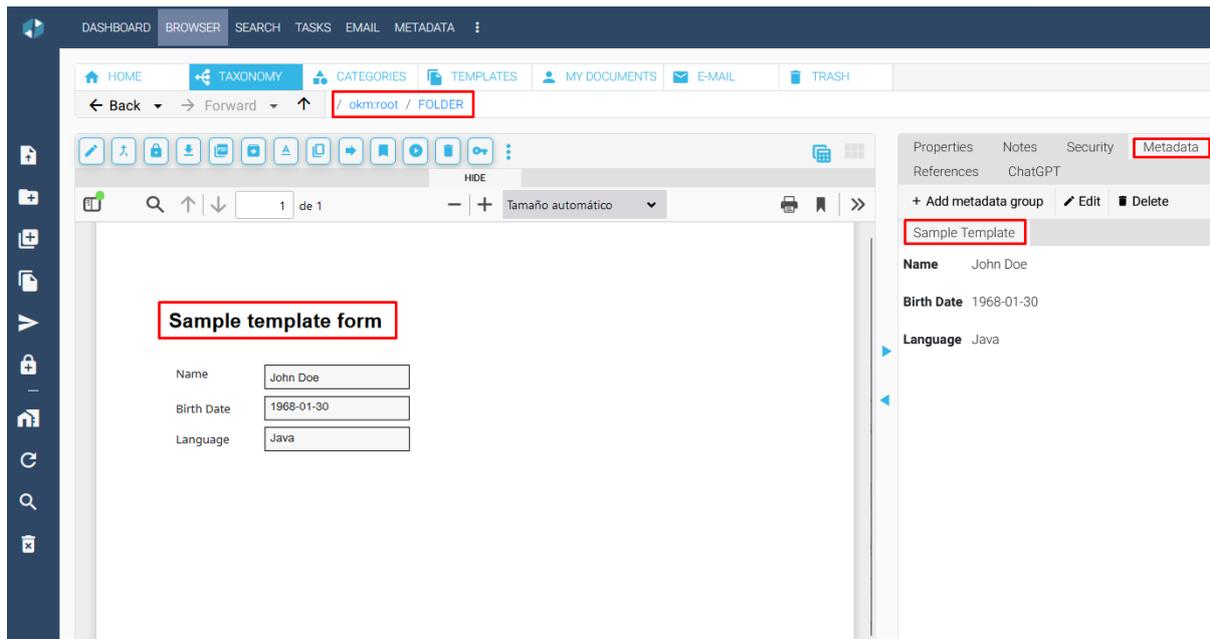
Destination /okm:root/FOLDER Edit

Name

Birth Date

Language

NEXT CANCEL



Tutorial video: https://youtu.be/EY2G4_Jqros

(Press the shift key when clicking this link to generate a new window)

1.3.5 How to lock, subscribe, restore or delete a document

Remove

Operation Icon: 

Available in

- Horizontal Toolbar of the Explorer Area.

Select the node you want and click the "Delete" icon. The application will always ask for your confirmation for this option.

Confirmation

Do you really want to delete this document "facture1.pdf"?

DELETE

CANCEL

Fig25

When the document or folder has been deleted, it can be recovered from the Trash.

Let's go to the trash section.  TRASH

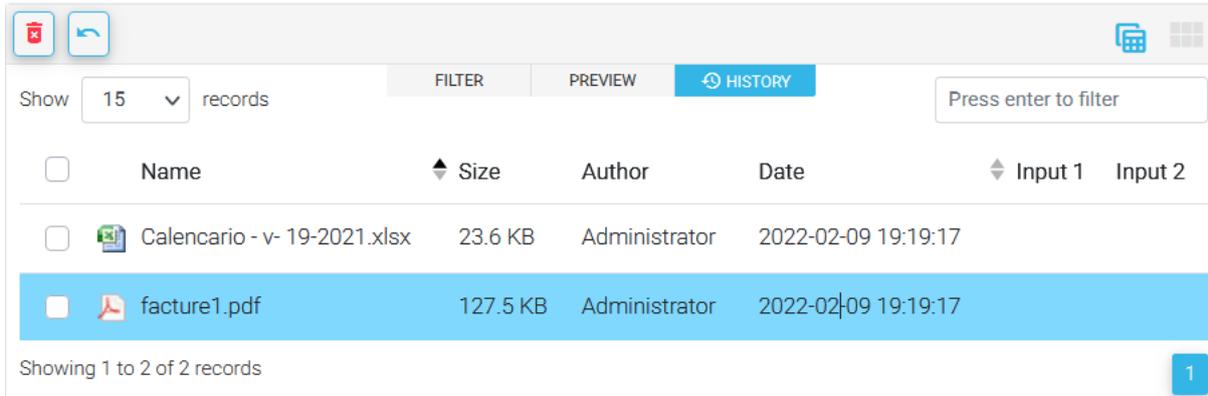


Fig26

There we can select the node that we want to recover and click on the button.

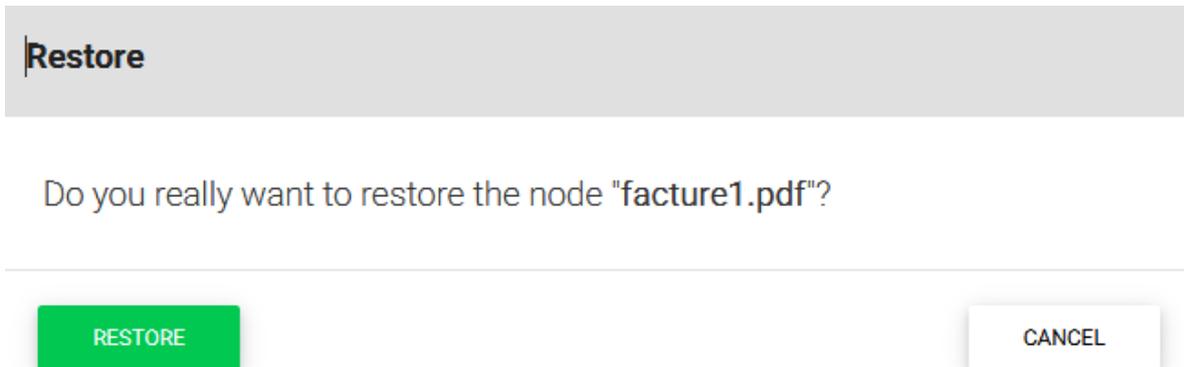


Fig27

The System will ask us if we want to restore the previously deleted content. In the affirmative case, it will host it in the route in which it was before being eliminated.

This icon  means the permanent removal of the selected node.

Blocking

Operation Icon: 

Available in

- Horizontal Toolbar of the Explorer area.

If you want to protect the file so that no other user can change it, you can use the Lock function. This means that as long as the file is unlocked, no user will be able to modify it. The System will ask you if you want to block the content.

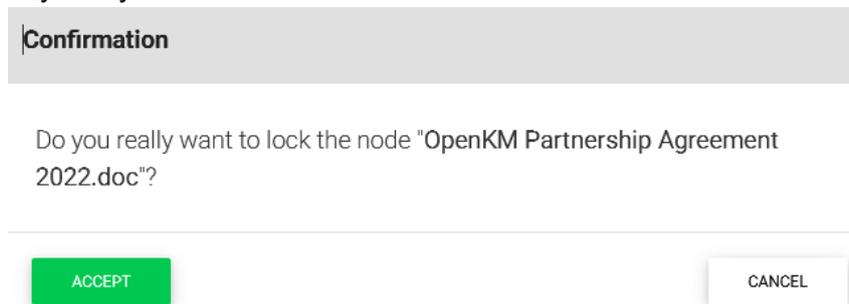


Fig28

When locked, a lock icon will appear next to the selected file's name . And in the Properties tab, the information Status will appear: Blocked on (full date) by (user)

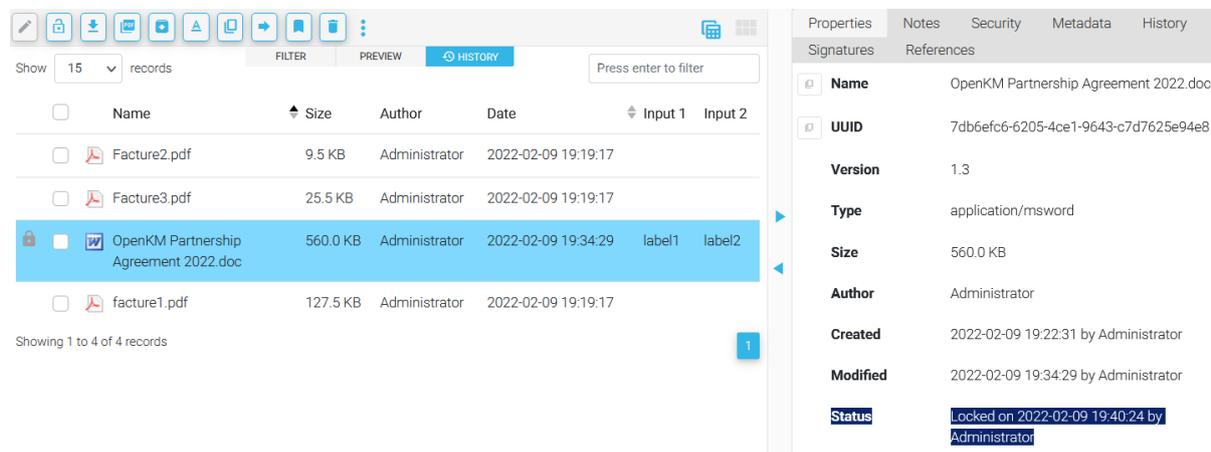


Fig29

Subscribe

In OpenKM we can subscribe to any content. Subscription service means that we will receive notifications each time that something happens to the subscribed node. We click on the + button next to the indicator "subscribed". Automatically, we will see a check in blue and our name on the list of subscribed users.

If we go to the Dashboard, we will see how the indicator Subscribed documents has been updated.

Tutorial video: <https://youtu.be/-1QxGVDfRyI>

(Press the shift key when clicking this link to generate a new window)

1.3.6 Stamping a document

When we create a document, and we do not want it to be used illegally, we use the watermark as a security method for this information.

Its main objective is to safeguard the information contained in a specific document against unauthorized users accessing it.

Precisely, this technique consists of inserting a message (hidden or not) inside a digital object, a group of bits containing information about the author or intellectual owner of the processed digital object.

Among the most characteristic properties of this type of stamping are:

- The robustness, that is, blind resistance against those modifications produced by the everyday operations to which the files will be exposed.
- Resistance to tampering.
- Imperceptibility: a watermark is invisible (transparent) if the degradation it causes in the files where it has been inserted is very difficult to appreciate
- The feasibility of the System in which the watermark is embedded.
- And the low probability of error.

Stamping in OpenKM

OpenKM, within its multiple functions as a document manager, allows the stamping of documents through the watermark. Whose main task is none other than to protect the information from possible unauthorized modifications.

Next, we will see how this stamping process is carried out in our document management system:

First, we will select a document in PDF or convertible to this format in our view mode in the "Taxonomy" of OpenKM, then click on the context menu and select the More/Print menu

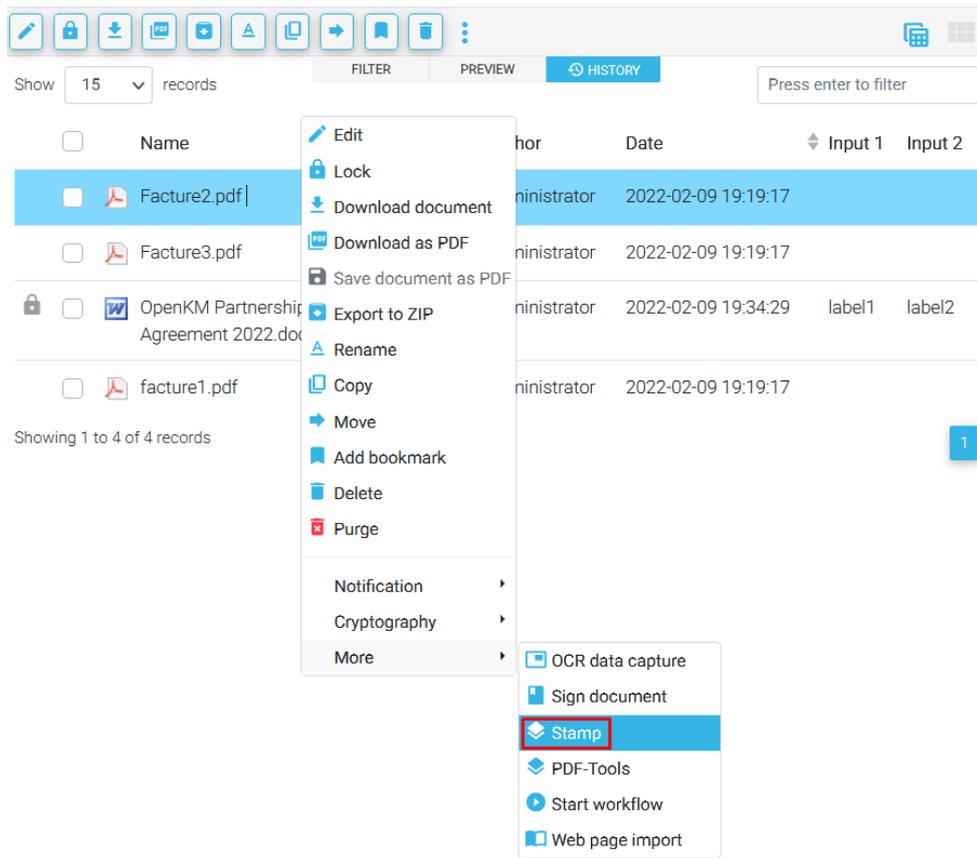


Fig.30

OpenKM will open a new window where we can preview the document to be stamped. We can change the background colour to improve the contrast. We can assign several types of prints in the "administration" section for each user. They must select one of the available stamps and apply it.

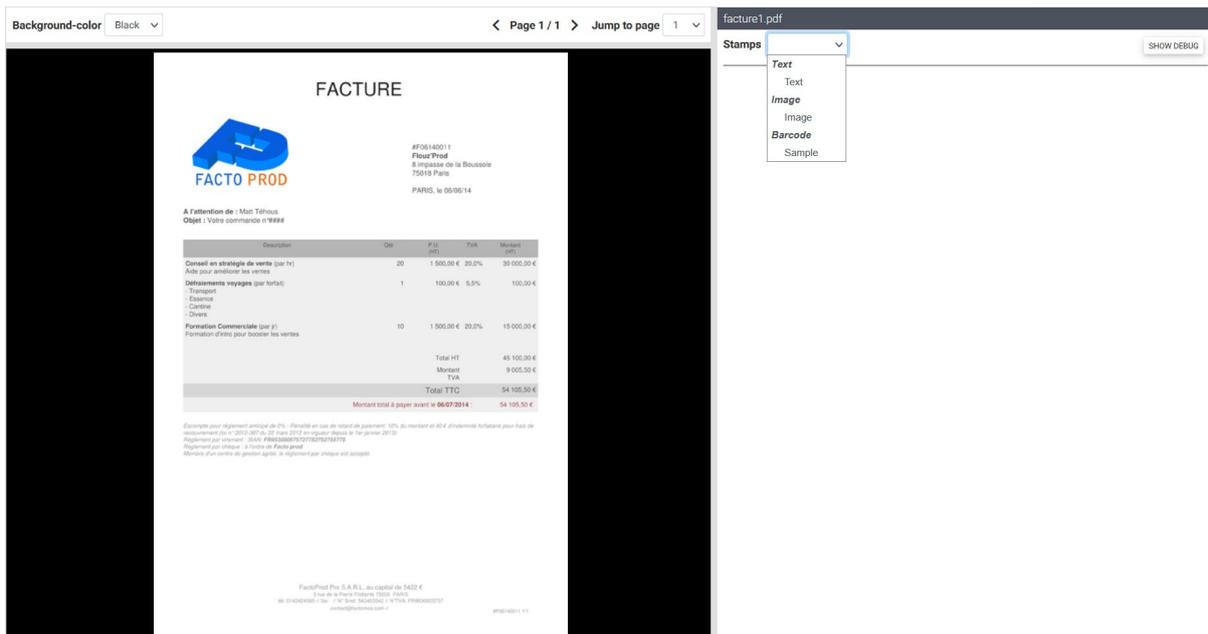


Fig.31

The System allows us to preview what the file would look like with the selected stamp.

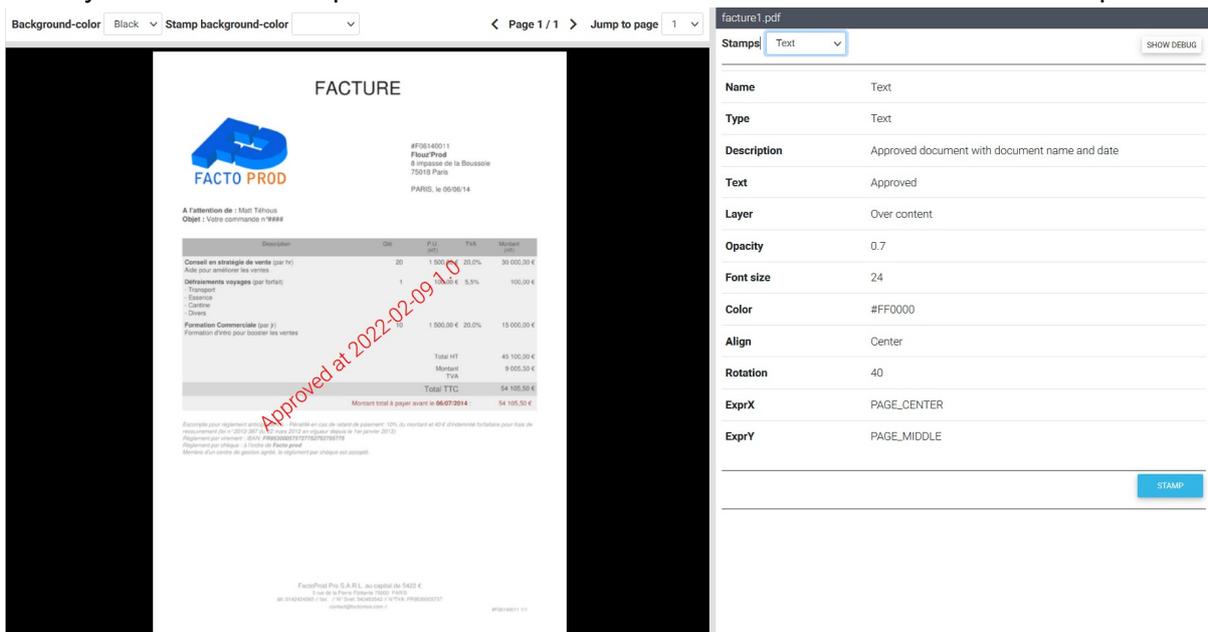


Fig.32

If we agree, we click on the "Print" button. The System automatically takes us back to the Explorer area, where we will see the updated version of the file next to the document thumbnail (also updated). After this process, a new PDF file will be generated (or a new version of the PDF file, if the selected stamp file was in another format).

Tutorial video: <https://youtu.be/DqmY4mTOPPY?feature=shared>

(Press the shift key when clicking this link to generate a new window)

1.3.8 Email import

Import user emails from any email account of this by IMAP. The import is done automatically by OpenKM every 30 minutes, depending on the configuration of the network bandwidth and other parameters; the refresh time could be more significant than this.

The import mechanisms create a folder structure based on year, month, and day to automatically organize imported emails.

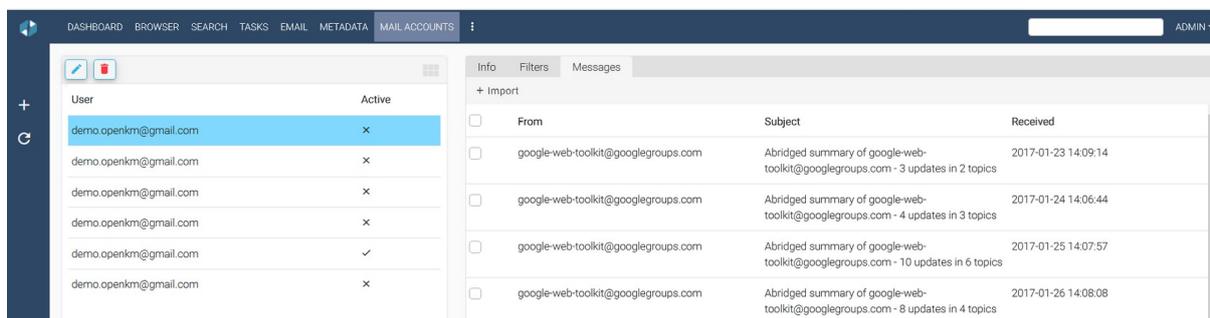


Fig.33

Users with administration privileges have access to all user emails.

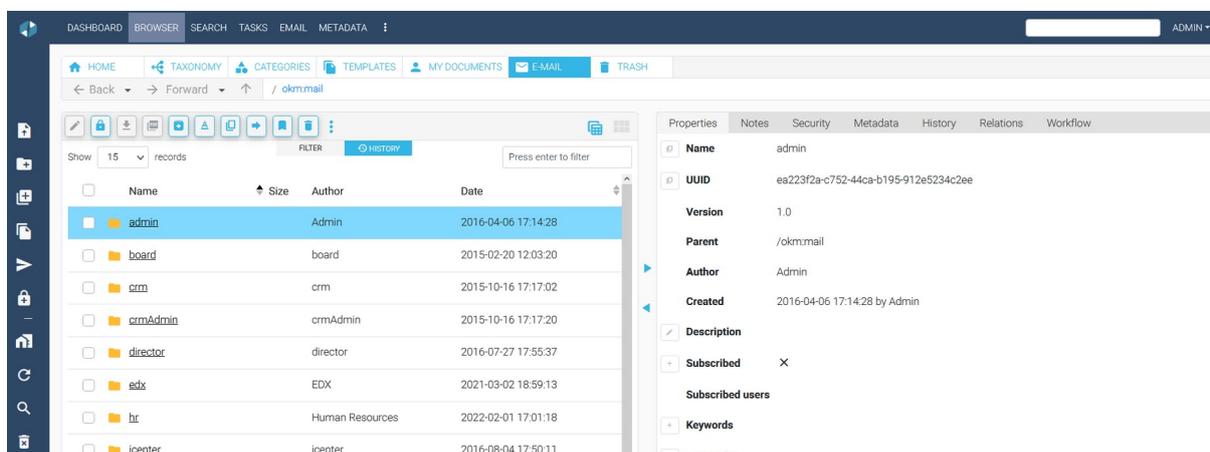


Fig.34

Videotutorial: <https://academy.openkm.com/mod/resource/view.php?id=705>

Copy attached documents

Using the context menu on the document and selecting the "Copy" option, a menu will appear to choose the destination folder and copy the attached document.

Download attached document

Using the context menu on the document and selecting the "Download" option will download the attached document.

Tutorial video: <https://youtu.be/A12j10nVpAg>

(Press the shift key when clicking this link to generate a new window)

1.3.9 Management of notes, preview, relations, and extracted text.

At the bottom of the screen, the properties of the document or folder are detailed with security, history, general properties, and specific aspects related to the documents defined by the users (settings document).

1.3.9.1 Properties Panel

On the right, the properties of documents, folders, e-mails and records are detailed with the general properties and specific properties related to documents defined by the user (document parameterization).

Properties	Notes	Security	Metadata	History	Preview	Relations	
<input type="checkbox"/> Name	Plantilla Documentos Word OKM2024.docx						
<input type="checkbox"/> UUID	c6165145-a0a0-462b-b3a6-5aa9b72aaa00						
Version	1.0						
Type	application/vnd.openxmlformats-officedocument.wordprocessingml.document						
Size	808.3 KB						
Author	Administrator						
Created	2024-01-17 19:43:35 by Administrator						
Modified	2024-01-17 19:43:35 by Administrator						
Status	Active						
Parent	/okm:root/FOLDER						
<input type="checkbox"/> Title							
<input type="checkbox"/> Description							
<input type="checkbox"/> Subscribed	X						
Subscribed users							
<input type="checkbox"/> Indexable	✓						
<input type="checkbox"/> Keywords							

Available options for folders, logs, and emails:

Properties	Notes	Metadata	History	Relations
 Name	FOLDER			
 UUID	b650056d-224a-47a9-a32b-db14966c4b61			
Version	1.0			
Parent	/okm:root			
Author	Administrator			
Created	2024-01-17 19:43:04 by Administrator			
Modified	2024-01-17 19:43:04 by Administrator			
 Description				
 Subscribed	X			
Subscribed users				
 Keywords				
 Categories				
 Related tasks				
 URL	https://demo302.openkcloud.com/openkm/kcenter/#/browser/uuid/b650056d-224a-47a9-a32b-db14966c4b61			
 Get content information				

- Properties tab
- Notes
- Relationships tab
- Activity log
- Workflow
- Property group tab (metadata)

Available options for documents:

Properties	Notes	Metadata	History	Preview	Relations
<input type="checkbox"/> Name	OpenKM Brochure - Español - España.pdf				
<input type="checkbox"/> UUID	d4af3a44-2711-4109-b623-e82f6bd7d72a				
Version	1.0				
Type	application/pdf				
Size	1.5 MB				
Author	Administrator				
Created	2024-01-17 19:43:34 by Administrator				
Modified	2024-01-17 19:43:34 by Administrator				
Status	Active				
Parent	/okm:root/FOLDER				
<input type="checkbox"/> Title					
<input type="checkbox"/> Description					
<input type="checkbox"/> Subscribed	X				
Subscribed users					
<input type="checkbox"/> Indexable	✓				
<input type="checkbox"/> Keywords					

- Properties Tab
- Notes
- History (version control)
- Preview tab
- Relationships tab
- Activity log
- Workflow
- Extracted Text tab
- Property Group Tab (Metadata)

Video tutorial:

- Explorer & Properties: <https://academy.openkm.com/mod/resource/view.php?id=213>

- History, Preview, and Relationships:
<https://academy.openkm.com/mod/resource/view.php?id=215>

The following describes each of the tabs in the properties panel of the contents saved in OpenKM

Properties

Properties
Notes
Metadata
History
Preview
Relations

<input type="checkbox"/>	Name	OpenKM Brochure - Español - España.pdf	
<input type="checkbox"/>	UUID	d4af3a44-2711-4109-b623-e82f6bd7d72a	
	Version	1.0	
	Type	application/pdf	
	Size	1.5 MB	
	Author	Administrator	
	Created	2024-01-17 19:43:34 by Administrator	
	Modified	2024-01-17 19:43:34 by Administrator	
	Status	Active	
	Parent	/okm:root/FOLDER	
<input type="checkbox"/>	Title		
<input type="checkbox"/>	Description		
<input type="checkbox"/>	Subscribed	X	
	Subscribed users		
<input type="checkbox"/>	Indexable	✓	
<input type="checkbox"/>	Keywords		
<input type="checkbox"/>	Categories		
<input type="checkbox"/>	Related tasks		
<input type="checkbox"/>	URL	https://demo302.openkmcloud.com/openkm/kcenter/#/browser/uuid/d4af3a44-2711-4109-b623-e82f6bd7d72a	

Share preview

The Properties tab displays essential data such as:

- The name of the content
- The Universal Unique Identifier
- The version of the file
- The type of content
- Size
- The author of the content
- The date the content was created

- the date of the last modification and the author
- The status of the file
- the path the document is in

We could also use other options such as:

-Add a title

- Add a description

-Subscribe to content: The subscription functionality is used to receive automatic notifications whenever there is a change to the node in question. You'll also see a summary of users who are subscribed to the content. These notifications can be received immediately or grouped together once a day.

We can also add:

- Keywords
- Categories
- see if the content is linked to any tasks registered in the OpenKM task manager.
- we will have the option to copy the URL of the file to be able to share the content easily with our collaborators
- You can also use the option to generate a link to share the preview of the content

Notes



In the Notes section we can add information equivalent to the classic post-it notes in electronic format. We can edit the annotations inserted by us, but we will never be able to find the annotations inserted by other users. At the same time, you can also see the list of editions in the history

Metadata



The metadata tab allows you to add group properties to your contents. Group properties version content. We can add several metadata groups and also edit the values of the

metadata fields. The display of metadata groups is subject to security policy, therefore, there may be differences between the metadata groups visible to each user.

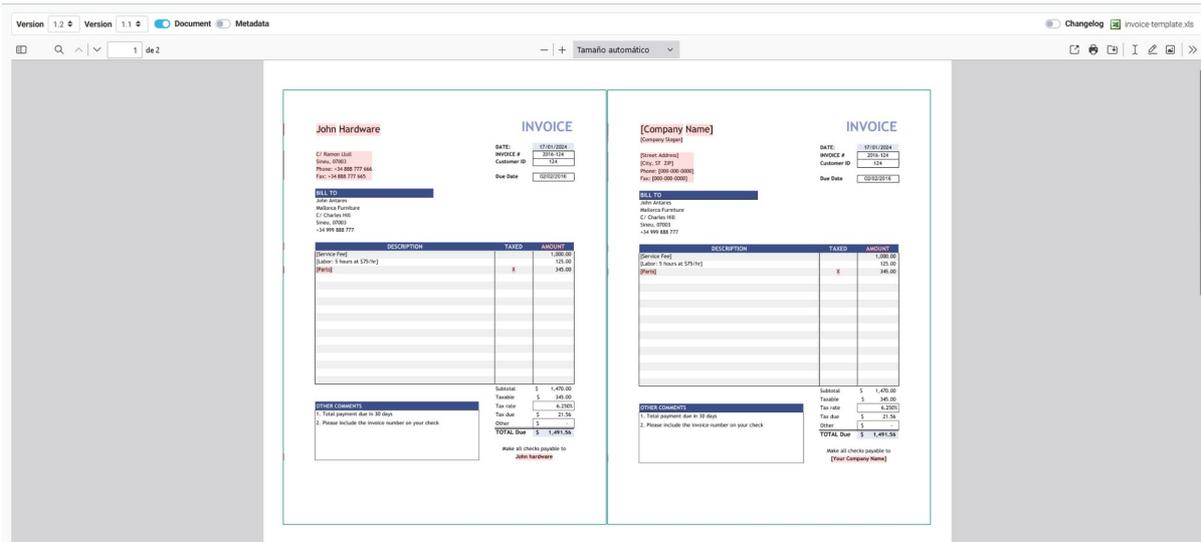
History

Properties	Notes	Metadata	History	Preview	Relations
<input checked="" type="checkbox"/> Compact	<input type="checkbox"/> View differences				
Version	Author	Created	Size	Restore	Action
1.3	Administrator	2024-01-17 20:25:51	1.5 MB		 
1.2	Administrator	2024-01-17 20:25:41	1.5 MB		 Show  Download  Add comment  Delete  Restore  
1.1	Administrator	2024-01-17 20:25:37	1.5 MB		
1.0	Administrator	2024-01-17 19:43:34	1.5 MB		

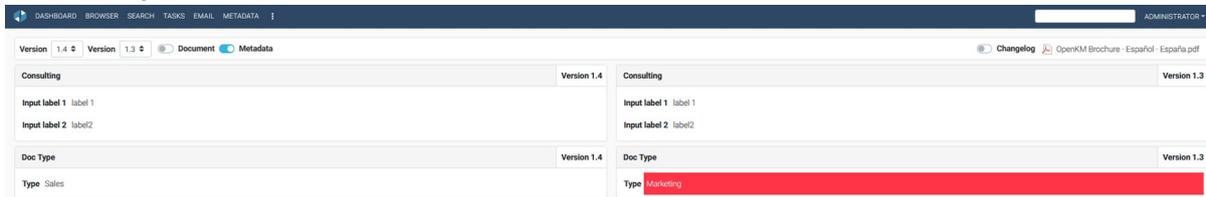
The history tab shows the full lifecycle of the document. On the History tab we see the versions, the authors of each version, the creation dates in size of each version. At the same time, we can restore different versions to the current one. An icon that represents the raison d'être of each of the versions. And access to a context menu with more functionalities: view a version of the content, download the version, add a comment, and even delete it. Compacting means removing previous versions of content. This action mainly serves to free up space.

If we click on the View Differences button, OpenKM provides us with the opportunity to compare the different versions of a file. There are 2 possibilities:

- compare the versions at the document level: in that case, if there are differences in the body of the content, OpenKM will display those differences highlighted in red.

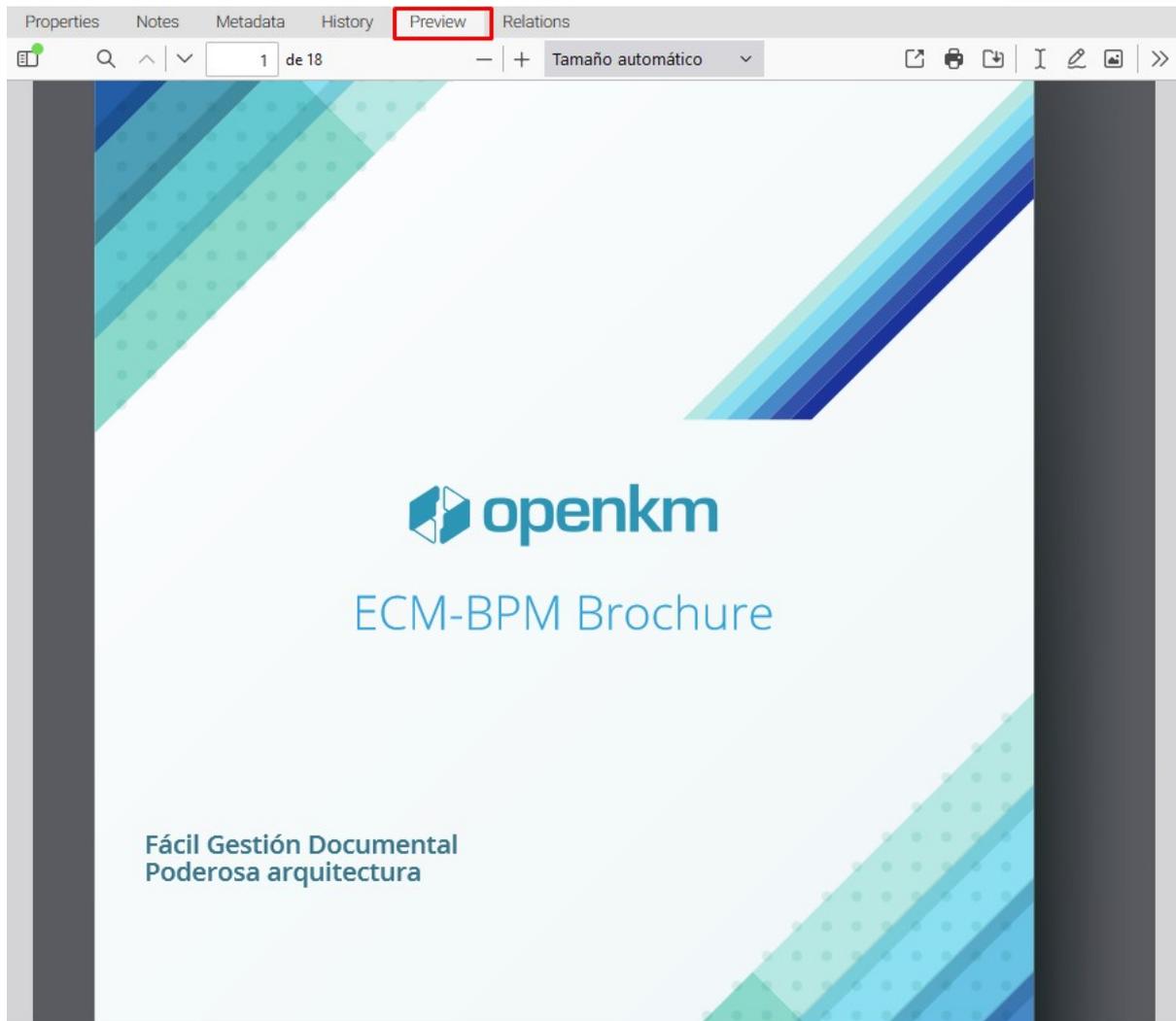


And also the possibility of comparing the different versions of a piece of content at the metadata group level.



In this case, OpenKM also highlights in red the differences in value between metadata fields, which is the raison d'être of the content version.

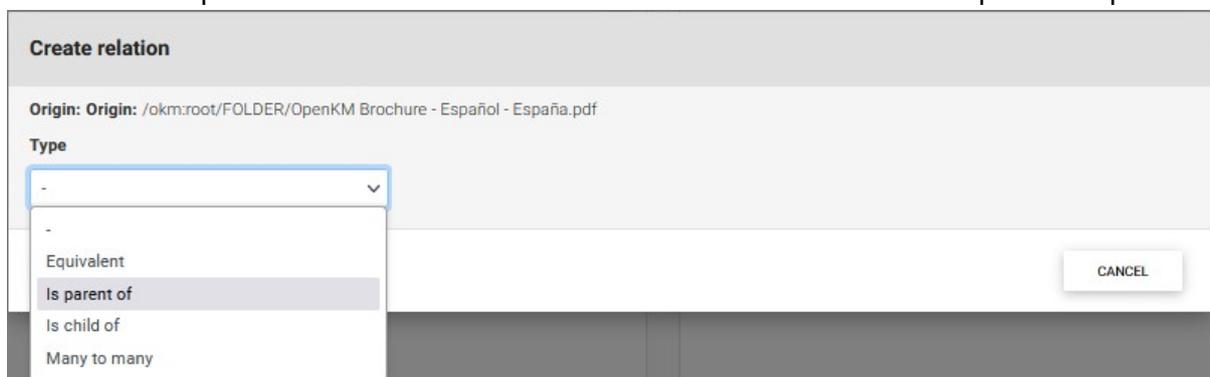
Preview



Allows you to preview the document, as it is. The preview can show stamps, stamps, or watermarks

Relations

The relationships tab shows the links that content can maintain and develop within OpenKM



Three types of relationships are contemplated

- Equivalence relationships: for example, a contract in Spanish and a contract in English. The English version will be equivalent to the Spanish version, since both versions contain the same information.
- Parent-child relationships: These are used to determine which content gives rise to other content.
- group relationships: they are not hierarchical in nature, as in the case of parent-child relationships; rather, all the contents are related at the same level. are part of the same project, are related to the same task, and so on.

Video-tutorial:

- Browser & properties: <https://academy.openkm.com/mod/resource/view.php?id=213>
- Notes and security: <https://academy.openkm.com/mod/resource/view.php?id=214>
- History, preview & relationships:
<https://academy.openkm.com/mod/resource/view.php?id=215>

(Press the shift key when clicking this link to generate a new window)

In the Document Properties Panel, we can find the Extracted Text extension. OpenKM extracts all the words contained in the body of the document.

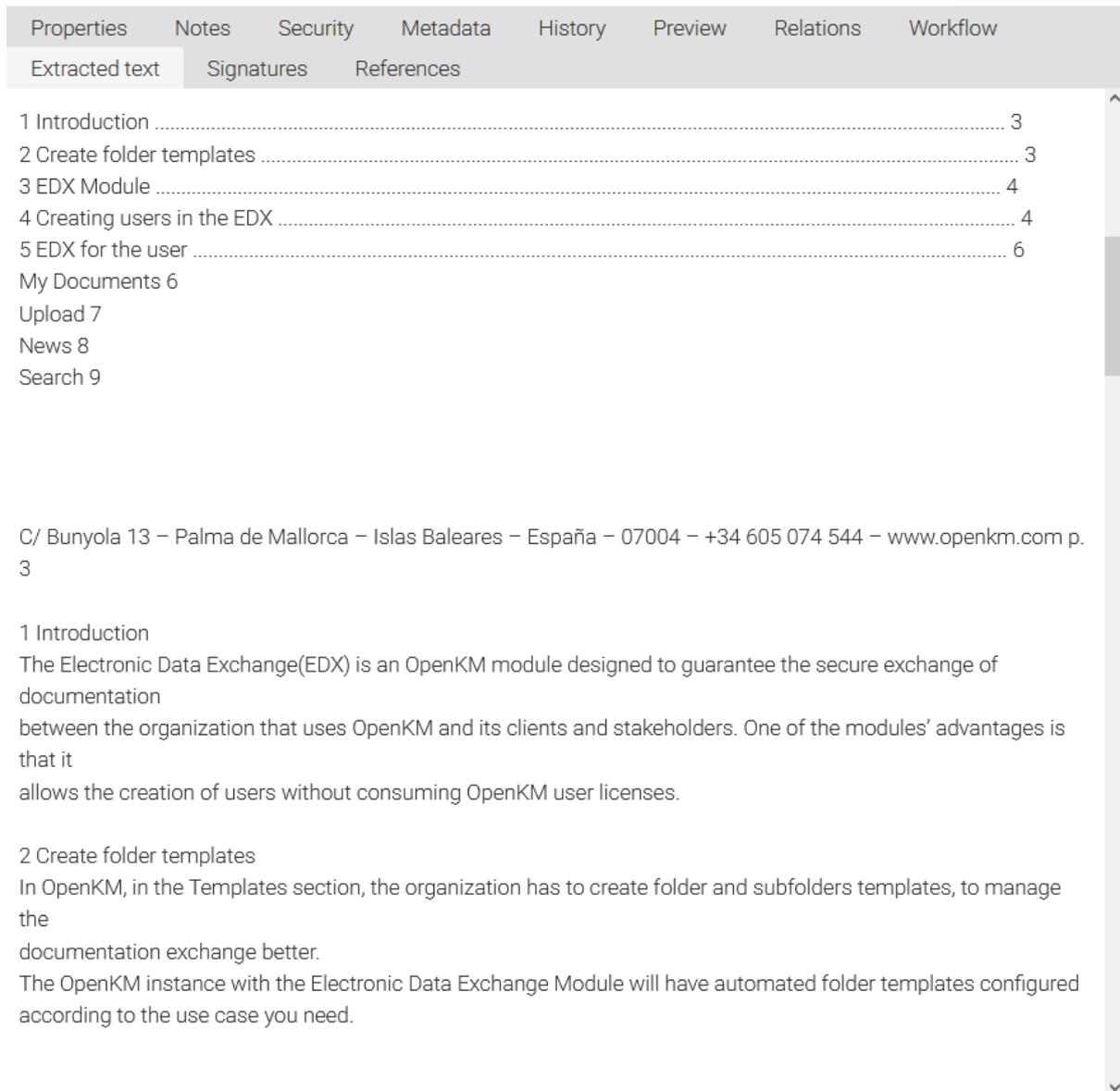


Fig.37

It allows us to verify that the application has correctly analyzed all the file's content. Text extraction is the function that allows the user to search the document for any word found within the file.

1.3.10 Search Engine

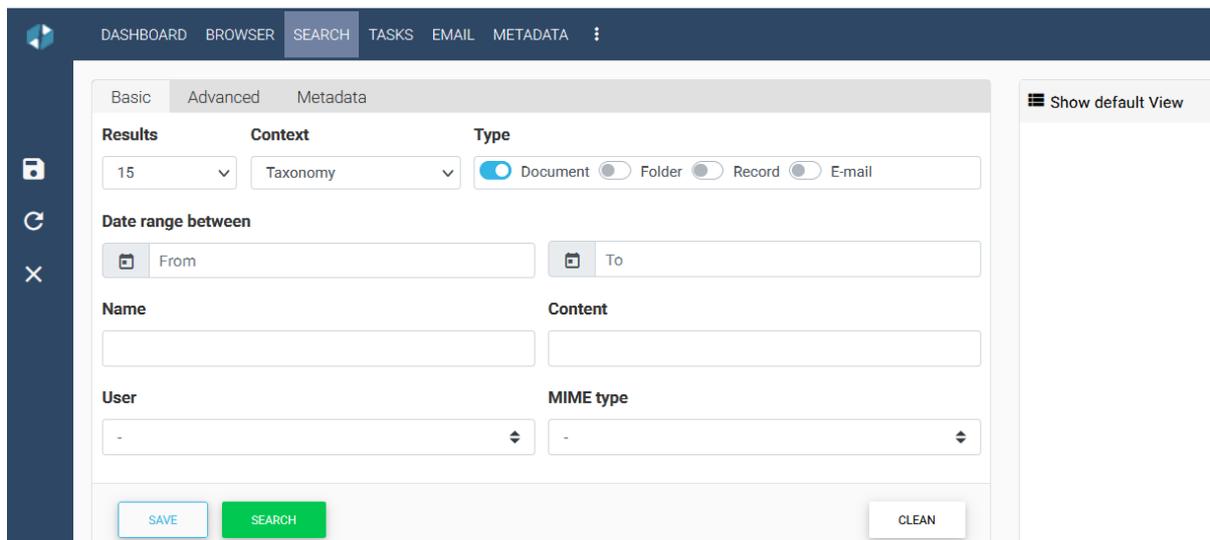
The search option can be located on the right side of the tool window.

Searches can be made by words contained in the files, by the name (title) of the document, or by the type of file (MIME type).

Similarly, if you assign keywords to a document, these will serve as the search field for the record. You can also search by property group values if they have been defined by language, author, or date range.

It shows between 10, 20, and 30, 50, or 100 results per page.

The list of records found is sorted from highest to lowest according to their relevance.



The screenshot shows the OpenKM search interface. At the top, there is a navigation bar with tabs for DASHBOARD, BROWSER, SEARCH (selected), TASKS, EMAIL, and METADATA. Below this, there are three tabs: Basic, Advanced (selected), and Metadata. The search form includes a 'Results' dropdown set to 15, a 'Context' dropdown set to Taxonomy, and a 'Type' section with radio buttons for Document (selected), Folder, Record, and E-mail. There is a 'Date range between' section with 'From' and 'To' date pickers. Below that are input fields for 'Name' and 'Content', and dropdown menus for 'User' and 'MIME type'. At the bottom of the form are buttons for 'SAVE', 'SEARCH', and 'CLEAN'. On the right side, there is a 'Show default View' button. A dark sidebar on the left contains icons for home, refresh, and close.

Fig.39

Tutorial video: <https://youtu.be/eZhpmdmnlpw?feature=shared>

(Press the shift key when clicking this link to generate a new window)

1.3.11 Task manager

The task management option allows you to create, manage and assign tasks to users or user groups (roles). Projects, states, or typologies can be created that can be assigned to any job. With Task Manager, you can filter by project, status, or type created by you or assigned to you.

Each task can be associated with one or more documents, folders, emails, or records.

Description of the different icon options:

-  → Add
-  → Edit
-  → Delete
-  → Add nodes (documents, records, folders, emails)
-  → Insert date and time (start/end)

Default view

By default, the Task Manager displays all active tasks assigned to the logged-in user in a panel. In the upper right corner, there is a button called List Status for task list maintenance and project list maintenance for project list maintenance.

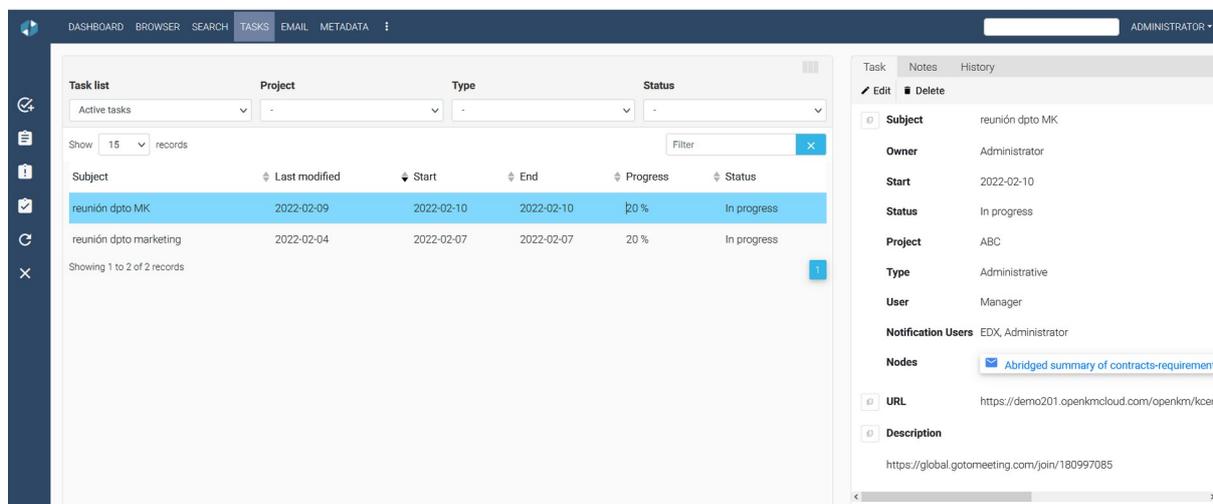


Fig.40

Status

Each task has been assigned to some state, and users with management approvals can maintain the status list. As a note on the following screenshot, each state can indicate which task has finished or not. For example, in the list on the next screen, you can see the status called "Canceled" or "Completed," which indicates that the task is not active.

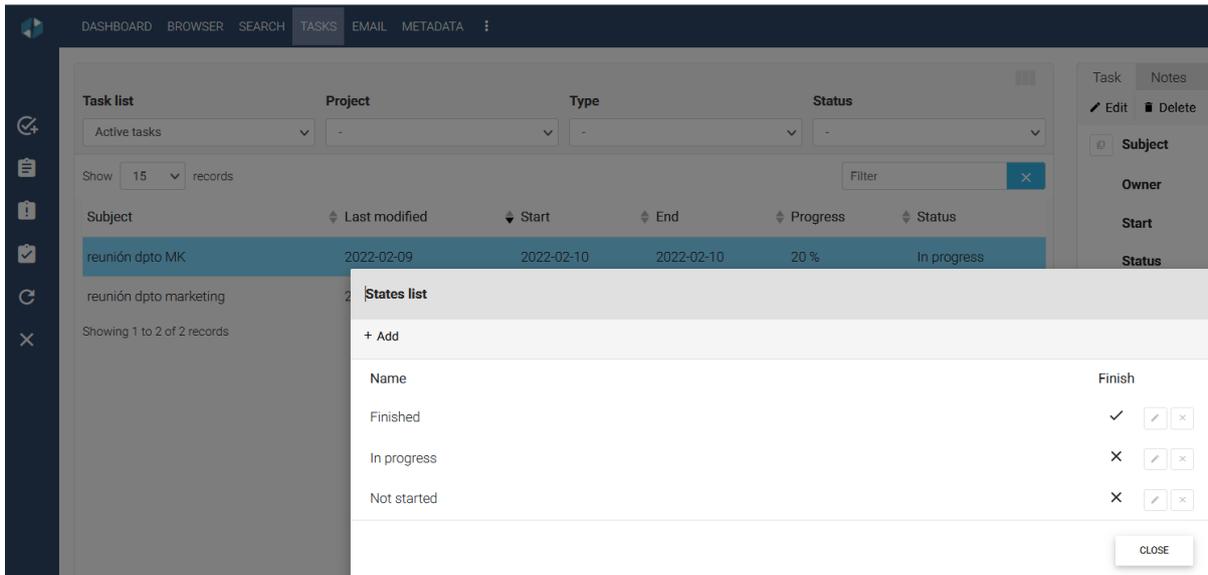


Fig.41

Projects

Each task has been assigned to some project. Users can maintain project lists with administration permissions. In the screenshot below, you can see a list of projects.

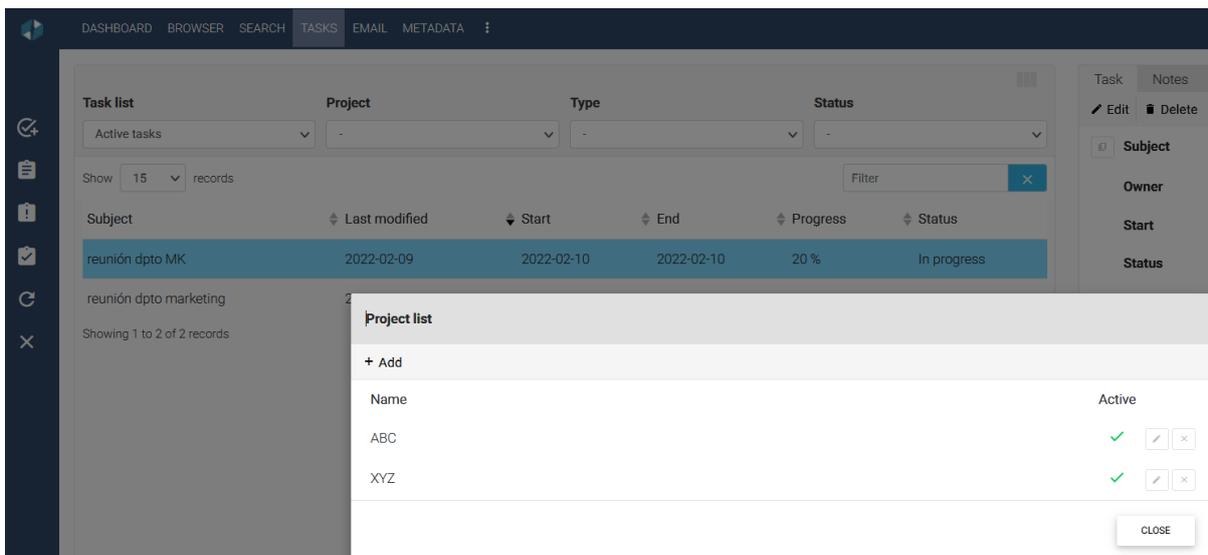
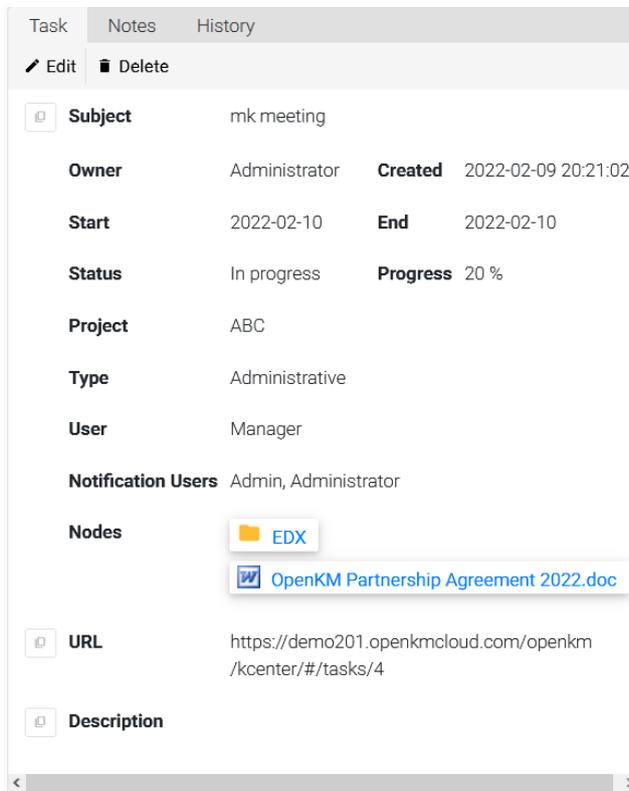


Fig.42

Create a task

To create a new task, you must click on the following button  below; a form will be displayed (note that some fields are required):

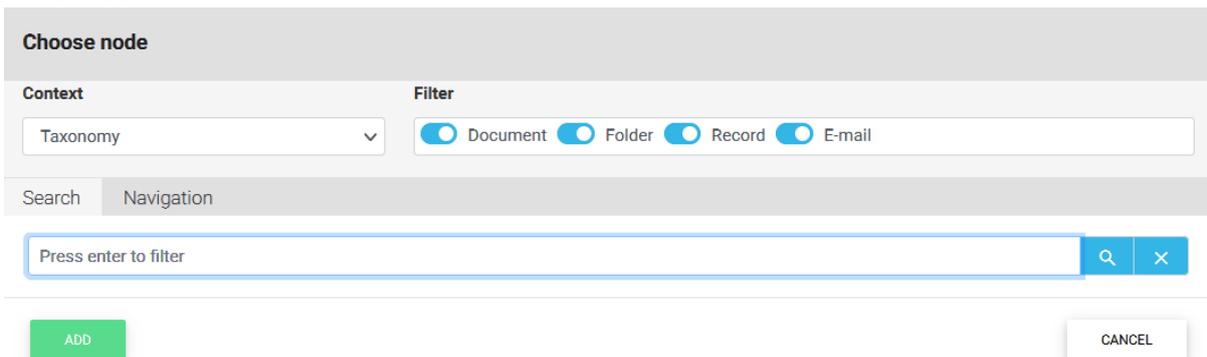


The screenshot shows a task details form with the following fields and values:

- Task**: mk meeting
- Owner**: Administrator
- Created**: 2022-02-09 20:21:02
- Start**: 2022-02-10
- End**: 2022-02-10
- Status**: In progress
- Progress**: 20 %
- Project**: ABC
- Type**: Administrative
- User**: Manager
- Notification Users**: Admin, Administrator
- Nodes**:
 - EDX (Folder icon)
 - OpenKM Partnership Agreement 2022.doc (Document icon)
- URL**: <https://demo201.openkmcloud.com/openkm/kcenter/#/tasks/4>
- Description**: (Empty field)

Fig.43

You can add related documents, folders, emails, or records on this screen. Clicking on the node insertion icon 



The 'Choose node' dialog box includes the following elements:

- Context**: Taxonomy (dropdown menu)
- Filter**: Document, Folder, Record, E-mail (checkboxes, all checked)
- Search**: Navigation (tab)
- Search Input**: Press enter to filter (text input with search and close buttons)
- Buttons**: ADD (green), CANCEL (white)

Fig.44

To complete the action, click the "Add" button.

A user with an assigned task which is not the owner - but rather the creator - is only allowed to modify the status, the progress of the task or add related documents, folders, emails, or records as shown in the following screenshot:

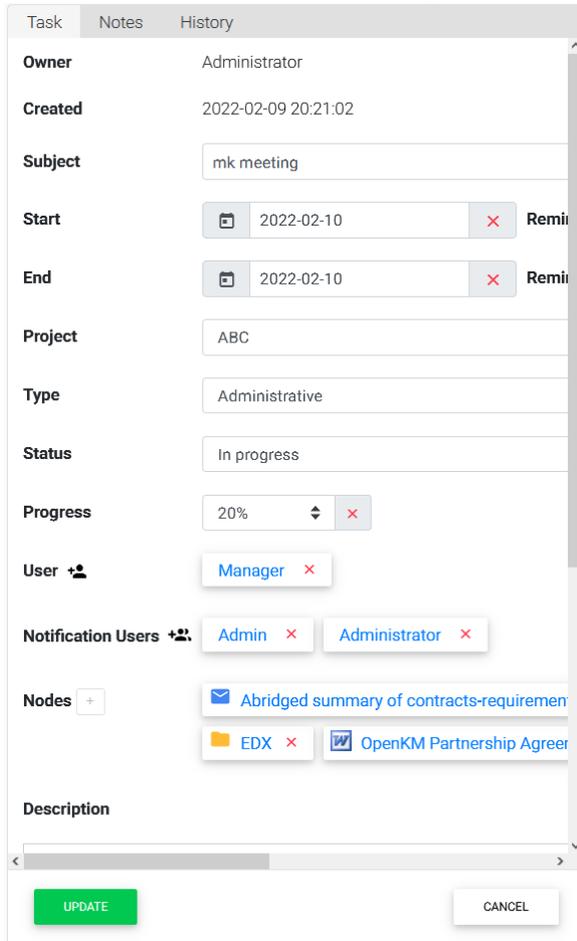
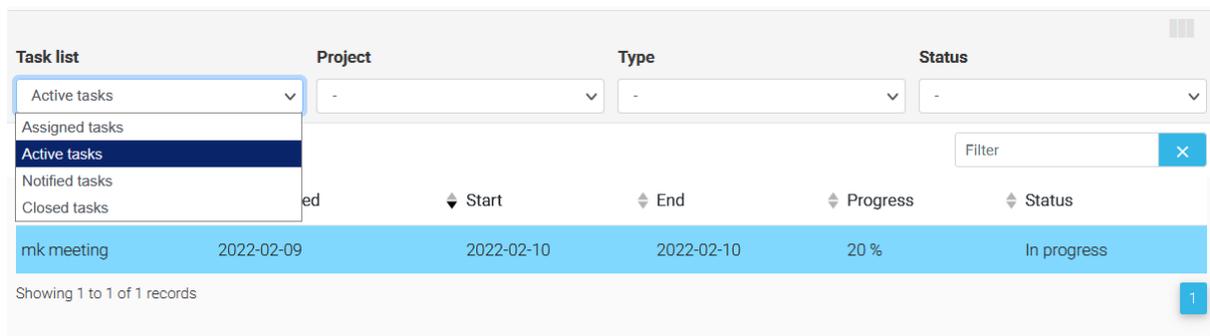


Fig.45

Filter tasks

You can filter tasks by assigned or created tasks and status or projects. You can see a task filtered by user-created tasks on the next screen.



Task list	Project	Type	Status
Active tasks	-	-	-
Assigned tasks			
Active tasks			
Notified tasks			
Closed tasks			

Task	Created	Start	End	Progress	Status
mk meeting	2022-02-09	2022-02-10	2022-02-10	20 %	In progress

Fig.46

You can see the task filter by task assigned to users on the screen. The delete button only appears if the user is the creator (owner). Otherwise, this option is not available.

Video tutorial: https://youtu.be/mk3fMo_xcbs?feature=shared

(Press the shift key when clicking this link to generate a new window)

1.3.12 Reports

Execute a report

- Click on Execute report icon.
- Fill in the fields (when report comes with parameters).
- Choose report output format
 - PDF format.
 - RTF format.
 - CSV format.

videotutorial: <https://academy.openkm.com/mod/resource/view.php?id=697>

2. Bibliography

1. OpenKM Academy: <https://academy.openkm.com/course/view.php?id=10>
2. Youtube. OpenKM channel <https://www.youtube.com/user/openkm>
3. User guide. OpenKM <http://docs.openkm.com/kcenter/>