# **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.

±.,	User	
â	Password	
	Language English	
	Sign In	
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

DASHBOARD	BROWSER	SEARCH	TASKS	EMAIL	METADATA	:
						Mail Accounts
						Reports
						Templates
F	ig. 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.

Subscribed records <u>س</u> ~ Electronic mails <u>ه</u> ۲ Attachments <u>س</u> ~ Below, we outline the most common activity indicators Locked documents

Last modified documents

Last created documents

Last created folders

Last created records

Last created documents notes

Last created folders notes

Last created records notes

Last created mails notes

<u>س</u> ~

a ~

<u>ه</u> ~

<u>ه</u> ~

*»* ~

<u>ه</u> ~

*س* ~

<u>س</u> ~

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

Locked	records
LOCKEU	recordo

BROWSER SEARCH TASKS EMAIL METADATA

Locked documents

Locked records

Locked folders

Locked electronic mails

Edited documents

Last downloaded documents

Subscribed documents

Subscribed folders

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

Locked	folders
Lockeu	roluers

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

Locked electronic mails

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

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~

~

~

Workflow - Pending tasks

Assigned tasks

Workflow - Pending pooled tasks

<u>س</u> ~

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<u>س</u> ×

<u>س</u> ~

<u>س</u> ~

<u>س</u> ۲

<u>س</u> ~

<u>س</u> ~



2





2 ~



Edited documents	2	~
Displays the list of documents in the edit state. In this status, the documents a the rest of the users who do not participate in the editing of the file.	are loc	ked for
Last downloaded documents	٣	~
This indicator informs about the latest files downloaded from OpenKM		
Subscribed documents	۳	~
Displays the list of documents on which the user has used the subscription fu	nction	ality.
Subscribed folders	۳	~
Displays the list of documents on which the user uses the subscription function	onality.	
Subscribed records	۳	~
Displays the list of electronic records on which the user uses the subscription	functi	onality.
Electronic mails	۳	~
Display the latest emails in OpenKM		
Attachments	۳	~
Displays the list of files attached to emails in OpenKM.		
Last modified documents	۳	~
Shows the list of the latest documents published in OpenKM		

Last created documents	<i>»</i> ~
Displays the list of the latest documents created in the system	
Last created folders	<i>»</i> ~
Displays the list of the latest folders created in OpenKM	
Last created records	<i>»</i> ~
Displays the list of the latest electronic records created in the system	
Last created documents notes	<i>»</i> ~
Displays the list of the latest annotations added to documents	
Last created mails notes	<i>»</i> ۸
Displays the list of the latest annotations added to folders	
Last created records notes	<i>»</i> ~
Displays the list of the latest annotations added to electronic records	
Last created mails notes	<i>»</i> ~
Displays the list of the latest appetations added to smalls	

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.

					WORK									ICK SE				USER
_	HOM Bac	E •€ TAXON				and path indi	cator in reposite	TRASH OFY	S	ECTIC	ONS C	OF INFO	ORMAT	ION				USEI
	Â			01:	•	Toolbars			P	roperties	Notes	Metadata	History	Relations	Wo	rkflow		
Sho	w 1	5 🗸 records		FILTER	HISTORY		Press enter to filte	er	ø	Name	,	AutoCAD						
		Name		Size	Author	Modifie	d	¢	0	UUID		48923a3-f13	)-48d1-b09e	88b6af8c44	cd			
		AutoCAD			Administrator	2023-09	9-25 13:39:23			Version		.4						
(	0	Automation			Administrator	2015-02	2-13 10:59:52			Parent		okm:root						
	0	Categories			Administrator	2022-10	0-27 10:41:32		Þ	Author		dministrator 018-08-27 12	50-22 by Ad	ministrator				
		Documents to co	ompare		Administrator	2016-02	2-03 09:31:58		•	Modified		023-09-25 13						
		EDX			Administrator	2021-03	3-02 18:16:33		1	Descriptio			, , ,					
		Edit		TS BROW		2022-10	0-27 18:37:49		+	Subscribe	d	×	F	ROPE	RTIE	ES PANEL		
		Expiration			Administrator	2021-09	9-17 11:05:10			Subscribe	d users							
		Mails			Administrator	2015-12	2-06 17:41:30		+	Keywords								
		OMR			Administrator	2015-12	2-01 16:34:14		+	Categories	s							
		Record			Administrator	2015-12	2-01 16:43:12		+	Related ta	sks							
		Relations			Administrator	2015-12	2-01 16:57:31		0	URL		ittps://demo3 09e-88b6af8		oud.com/op	enkm/kc	enter/#/browser/uu	id/748923a3-f130-4	8d1-
		Reports			Administrator	2022-10	0-27 10:51:27			() Get cor								
		Repository Repo	rts		system	2023-09	9-03-00:00:09			2 00100								
		Signature			Administrator	2022-10	0-27 11:02:03											
		Stamp			Administrator	2022-10	0-27 10:52:43											
Sho	wing '	to 15 of 20 records					1 2 N	lext Last										

Fig. 3

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

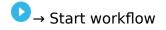


### 1.2.2.1 Contextual Menu

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.







 $\square \rightarrow$  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.

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n _	
C	
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8	



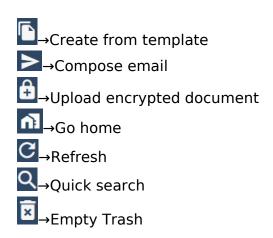
Detail of the functions according to their icons:

- ∕ →Edit a document
- Block
- <sup>⊥</sup>→Download a document
- →Download document in PDF format
- $\checkmark$   $\rightarrow$  Export in ZIP format
- $A \rightarrow$  Rename •  $\Box \rightarrow$  Copy •  $\Rightarrow \rightarrow$  Move •  $A \rightarrow$  Add bookmark •  $\bullet \rightarrow$  Start workflow •  $\bullet \rightarrow$  Delete

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

Add document
 →Create folder
 →Add record





#### 1.2.4 Meaning of each work area

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

DASHBOARD	BROWSER	SEARCH	TASKS	EMAIL	METADATA	ADMINISTRATION	:
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.

/ okm:root / EDX / admin / Docs from

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:

- $\models$   $\rightarrow$  Folder. It may contain subfolders.
- $\blacksquare$  The folder is read-only. May contain subfolders.
- $^{\odot}$   $\stackrel{\bigcirc}{=}$   $\rightarrow$  You are subscribed to the folder.
- $^{\odot}$  Hou 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).

O Document	Folder		Record	💽 E-mail	
Show 15 V records	FILTER	HISTORY		Press enter to filter	
Name	🔶 Size	Author	Date		¢
AutoCAD		Administrator	2018-08-27 12	2:59:32	
Automation		Administrator	2015-02-13 10	):59:52	
📄 📄 Digital Signature		Administrator	2020-08-20 1	3:41:29	
Documents to compare		Administrator	2016-02-03 09	9:31:58	
		Administrator	2021-03-02 18	3:16:33	
Expiration		Administrator	2021-09-17 1	1:05:10	
🗌 는 Mails		Administrator	2015-12-06 1	7:41:30	
		Administrator	2015-12-01 16	5:34:14	
Record		Administrator	2015-12-01 16	5:43:12	
Relations		Administrator	2015-12-01 16	6:57:31	
🗌 늘 Workflow		Administrator	2020-05-05 09	9:25:08	
🗌 늘 Zone OCR		Administrator	2015-02-13 12	2:18:39	
🗌 늘 doc-signer		Administrator	2020-03-27 1	3:59:54	
metadata-in-browser Showing 1 to 15 of 19 records		Administrator	2021-04-20 1	_	t Las

Fig.7

We can decide the number of results we display per page

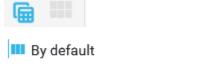


Fig.8

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

				KnowledgeManagement
	Ocument	C Folder	C Record	C E-mail
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.



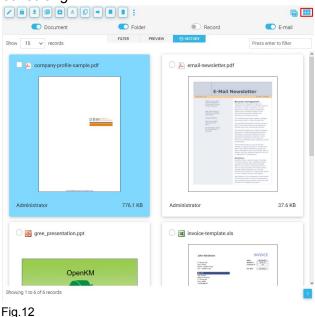
III Consulting metadata sample

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).



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



### 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).

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onenkm



Properties	Notes	Security	Metadata	History	Preview	Relations	Workflow	Signatures
References								

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	
<b>Path</b> /okm:root/metadata-in-browser	
Name	
1	
Step into created node	
Off	
_	
CREATE	CANCEL
14	

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



### 1.3.2 File upload

rtical Toolbar o		-							ADMINISTR	
HOME     ← TAXONOMY       ← Back     → Forward	_	EMPLATES 💄 M	Y DOCUMENTS M E-M	MAIL 🍵 TR	ASH					
Add document				G		0	)	Increme	nt major version 🛛 Auto u	
O Document	C Folder	0	Record	E-mail			ADD NEW DOCUMENTS	ADD NEW FOLDERS	CLOSE ×	
Show 15 v records	FILTER	HISTORY		Press enter to filter						
Name	🕈 Size	Author	Date		÷					
AutoCAD		Administrator	2018-08-27 12	2:59:32						
🗌 📁 Automation		Administrator	2015-02-13 10	0:59:52		•				
🗌 📔 Digital Signature		Administrator	2020-08-20 13	3:41:29		•				
Documents to compare		Administrator	2016-02-03 09	9:31:58						
		Administrator	2021-03-02 18	8:16:33						
🗌 🖿 Expiration		Administrator	2021-09-17 11	1:05:10						
🗋 📁 Mails		Administrator	2015-12-06 17	7:41:30				Drag files here		
🗆 🖿 OMR		Administrator	2015-12-01 16	5:34:14						
🗌 📁 Record		Administrator	2015-12-01 16	5:43:12						
C Elations		Administrator	2015-12-01 16	6:57:31						
🗆 늘 Workflow		Administrator	2020-05-05 09	9:25:08						
C E Zone OCR		Administrator	2015-02-13 12	2:18:39						
doc-signer		Administrator	2020-03-27 13	0-E0-E4						

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.

•		Increment major version  Auto upda				
ADD NEW DOCUMENTS 🚦	ADD NEW FOLDERS	CLEAN ×	CLOSE ×			
Name	Path	Size	Speed Progress			
🔎 facture1.pdf	/ okm:root/ FOLDER	127.5 KB 127.8	3 KB / seg 🚺 100 % 📋 🥛			
Facture2.pdf	/ okm:root/ FOLDER	9.5 KB 9.7	7 KB / seg 🚺 100 % 📋 🧻			
Facture3.pdf	/ okm:root/ FOLDER	25.5 KB 25.7	7 KB / seg 🚺 100 % 📋			

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

♠ HOXE     ♣ CATECORIES     ● TAVELATES     ▲ MY       ● Back • → Forward • ↑     / shmoot / Folder       2     A     ●     ●     ●       ■     ■     ●     ●     ●     ●       ■     ■     ●     ●     ●     ●					
	6				
			Properties Notes ChatGPT	Metadata History Preview Relations Workflow	Signatures References
S[Edit] 15 v records	Press enter to filter		Ø Name	Test word document.docx	
Name Size Author	Modified	0	e UUID	2bd24410-45ze-4092-b157-2c83707ce1cf	Título principal del documento
Normativa_de_matricula_master_julio_2 312.0 KB Administr	rator 2024-01-16 00:06:09		Version	11	
🕞 💫 OpenKM Brochure - Español - España pdf 1.5 MB Administr	rator 2024-01-16 00:06:10		Туре	application/vnd.openxmlformats	
E TEST FORM.pdf 14.7 MB Administr	rator 2024-01-16 01:11:46			officedocument.wordprocessingml.document	Q
💼 📄 🗟 Test word document docx 808.3 KB Administr	rator 2024-01-16-01:02:56			808.3 KB	
Showing 1 to 4 of 4 records				Administrator	& operium
		-		2024-01-15 01:02:55 by Administrator	
				Created from Plantilla Documentos Word OKM2024.docx template	0
				2024-01-16 01:02:56 by Administrator	
				Active	
				/akm:root/FOLDER	
			/ Title		
			<ul> <li>Description</li> </ul>		
			+ Subscribed	×	
			Subscribed users		
			+ Keywords	OpenKM × Design_2024 ×	
			+ Categories	Category example ×	
			Deleasederates		

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)



•	DASHBOARD	BROWSER SEARCH TASKS EMAIL METADATA :				ADMINIST
	A HOME	CUMENTS	E-MAIL			
	← Back	File     Status     Cokmissol./FOLDER/Test word document docs     Downloaded     S				
Ð	/ t		400	Properties Not ChatGPT	es Metadata History Preview Relations Workflow	Signatures References
÷	Show 15	<b>~</b>	Press enter to filter	Name	Test word document.docx	
œ			Modified \$	UUID	2bd24410-45ae-4092-b157-2c83707ce1cf	Título principal del documento Subtitulo principal
		strator	2024-01-16 00:06:09	Version	1.1	
>		OpenKM Brochure - Español - 1.5 MB Administrator España.pdf	2024-01-16 00:06:10	Туре	application/vnd.openxmlformats- officedocument.wordprocessingml.document	Q
£		EST FORM.pdf     14.7 MB     Administrator	2024-01-16 01:11:46	Size	808.3 KB	
ñ	<b>•</b> / 8	Test word document.docx     808.3 KB Administrator	2024-01-16 01:02:56	Author	Administrator	
C	Showing 1 to	l of 4 records	1	Created	2024-01-16 01:02:55 by Administrator	openkm
Q	<b>⊟</b> 5 - 0		OpenKM Team 🛞 🖻 – 🗆 🔿		Created from Plantilla Documentos Word OKM2024.docx template	
 ≅	Archivo Inicio		Vista Ayuda OpenKM 🛇 ¿Qué des 🗘	Modified	2024-01-16 01:02:56 by Administrator	
	Peciar	$\begin{array}{c} AaBbCcD \\ AbbCcD \\ AaBbCcD \\ AbbCcD \\ AaBbCcD \\ AbbCcD \\ $		Status	Edited on 2024-01-16 01:23:10 by Administrator	
	Portapapeles 💈	Fuente 15 Párrafo 15 Estilos	rs Complementos	^ Parent	/okm:root/FOLDER	
				Title		
		Título principal		Description		
		Título principal		Subscribed	×	
		del documento		Subscribed use	irs	

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

OKMLiveEdit	—	)	$\times$
File	Status		
/okm:root/FOLDER/Test word document.docx	Changed@1:27:13	$\bigcirc$	٢

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

4	DASHBOARD	BROWSER SEARCH TASK	'S EMAIL METADATA 🚦			
	A HOME			LATES 💄 MY DOCUM	ENTS E-MAIL	TRASH
	← Back ▼	→ Forward ▼ ↑	/ okm:root / FOLDER			
1				· ·		
+	Show 15 V	records		C THISTORY	Press ente	r to filter
Ð		Name	Size	Author	Modified	\$
•		Normativa_de_matricula	a_master_julio_2 312.0 KE	3 Administrator	2024-01-16 00:06	:09
>		OpenKM Brochure - Esp	añol - España.pdf 1.5 MB	Administrator	2024-01-16 00:06	:10
<b>e</b>		TEST FORM.pdf	14.7 MB	Administrator	2024-01-16 01:11	:46
-	• • •	Test word document.do	сх 101.6 КЕ	3 Administrator	2024-01-16 01:28	:52
	Showing 1 to 4 o	of 4 records				
G	Refresh					

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 w	ve can	check if the	connection	with O	penKM is	correct
	Configuration	ve cun		connection		permana io	0011001

Configuration			×
	Language	English ~	
	User	manager	
	Password		
	Host Succe	essful X 2000/openkm/	
	Add me		
	Find by	Connection established	
		Accept # Test	
st connection			

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

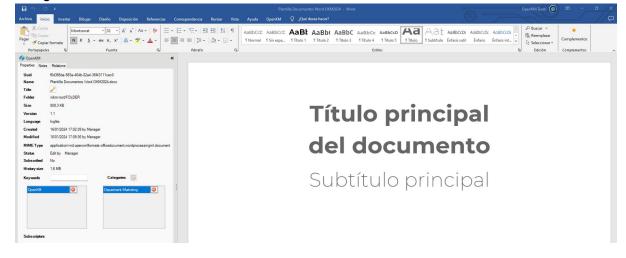
🚯 Configuration	Cheking	💐 Import image
🛃 Upload	Cancel	😡 Help 🗵
📓 Edit	Compare versions	
	OpenKM	

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



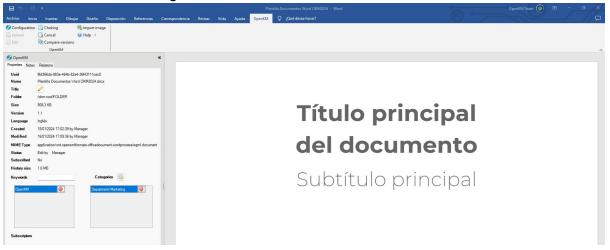
axonomy	~	Se	earch fol	der	Sear	rch doo	ument	Edit	Exit	
⊡ 🥭 okm:root							Name	Author	Version	Date
🗁 AutoCAD			2			R	OpenKM Brochur	manager	1.1	16/01/2024 22:4
Automation		•				2	Plantilla Documen	-	1.1	16/01/2024 17:0
Documents to compare										
🗁 EDX										
😂 Edit										
Expiration										
FOLDER										
Mails										
- OMR										
🔁 Record										
Reports Bepository Reports										
Signature										
- Stamp										
🗁 Workflow										
- Zone OCR										
······ Eme-control										

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.

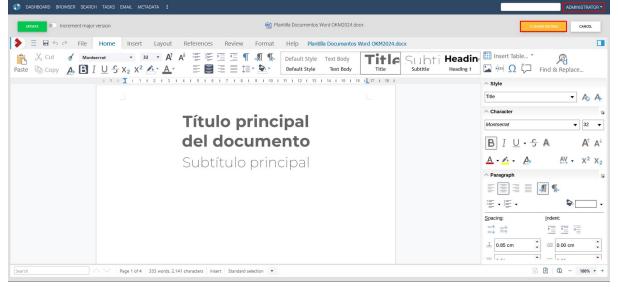
This option also protects edit jobs from overwriting. But there is an option that allows simultaneous editing.

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.

🜓 DASHBOARD BROWSER SEARCH TASKS EMAIL METADATA :		MANAGER -
🗑 Plantilla Docur	mentos Word OKM2024.docx	
🜔 🗏 🖶 🗢 🕫 Home Insert Layout References Review Format	Help Plantilla Documentos Word OKN	M2024.docx
A       Cut       ✓       Montserrat ExtraLit       Z8       A <sup>↑</sup> A <sup>↓</sup> Image: Ima	Default Style Text Body Default Style Text Body	Title Subtite Insert Table* Subtite Subtitle Γ H Ω C Find & Replace
I 1 I X I 1 I 2 I 3 I 4 I 5 I 6 I 7 I 8 I 9 I 10 I 11 I 1	12   13   14   15   16   17   18	Style
		Subtitle  • A <sub>0</sub> A <sub>+</sub>
OpenKM		∧ Character Montserrat ExtraLight ▼ 28 ▼
Because information r	matters	BIU·∽AA^A
•		$\underline{A} \cdot \underline{A} \cdot \underline{A} \cdot \underline{A} \cdot \underline{A} \cdot \underline{A} \cdot \underline{X}^2 \times X_2$
		^ Peragraph E E E E II € II €
		Spacing: Indent: $\stackrel{=}{=} \stackrel{=}{=} $
		⊥ 0.00 cm 🗘 🖅 0.00 cm 🗘
Search Page 1 of 4 3 words, 27 characters Insert Standard selection		🛃 <sup>2</sup> users 🗸 🕞 🕒 🕲 – 100% 🗸 -

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: <u>https://youtu.be/psSP3qeKh94?feature=shared</u> (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

eyword	
OpenKM	
ADD	CANCEL

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



#### 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	<b>२</b> ×
Path	
/okm:categories/Department/Marketing	0
Showing 1 to 1 of 1 records	1
ADD	CANCEL

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	0
Path	
Board	0
Human resources	0
💴 II	0
Management	0
Marketing	0
Secretary	0
Showing 1 to 6 of 6 records	1
ADD	CANCEL
To see how to create categories (see Categories section)	
+ Categories Marketing ×	

#### 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

	A HOME			
	$\leftarrow$ Back $\bullet$	$ ightarrow$ Forward $\blue$	↑ / okm:categor	ies
+ Cr	eate folder			

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

Create folder	
Path /okm:categories	
Name	
Category example	
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



A HOME	+ TAXONOMY		TEMPLATES	A MY DOCUMENTS	E-MAIL	TRASH
← Back 👻 -	→ Forward 👻 🖌	/ okm:categories				
	ecords	FILTER	HISTORY		Press ent	er to filter
Nam	ne	♦ Size	Author	Modifie	ed	\$
📄 🖿 <u>Cate</u>	egory example		Administrator	2024-0	1-16 00:29:38	
🗌 🖿 Depa	artment		Administrator	2015-0	2-13 10:15:45	
	ument type		Administrator	2015-0	2-13 10:09:00	
📄 🖿 <u>Regi</u>	ion		Administrator	2015-0	2-13 10:07:23	
Showing 1 to 4 of 4	records					1

#### **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

	DASHE	BOARD	BROWSER SEARCH TASKS	email metadata 🚦			
	↑ H ← B	ome ack -		CATEGORIES TEMPLATE		JMENTS 🛛 E-MAIL	TRASH
<mark>.</mark> ∔	Add doc	umen	t 💽				
•	Show	15	✓ records	FILTER PREVIEW	HISTORY	Press enter t	o filter
Œ		$\bigcirc$	Name	Size	Author	Modified	\$
		$\bigcirc$	Plan de Proyecto.doc	516.0 KB	Administrator	2021-02-12 10:28:30	
>		$\bigcirc$	K Procedures.pdf	1.5 MB	Administrator	2023-02-28 17:55:32	
₽		$\bigcirc$	empty_content.html	0 Bytes	Administrator	2019-04-06 12:45:47	
_		$\bigcirc$	text-template.html	387 Bytes	Administrator	2023-03-20 10:52:06	
<b>N</b>		$\bigcirc$	📙 tpl_2.pdf	21.4 KB	Administrator	2019-04-06 12:49:32	
G			👔 wf-template.odt	697.9 KB	Administrator	2020-05-05 09:23:15	
Q	Showir	ng 1 to 6	of 6 records				1



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

•	HOME		GORIES	A MY DOCUMEN	its 🔛 e-mail 🔋 tra	ASH				
+	- Back	• $\rightarrow$ Forward • $\uparrow$ / okm	mtemplates / documents							
			0 0 0		G		↔		Increment major	version 💽 Auto upda
Sho	ow 15	v records	FILTER PREVIEW	O HISTORY	Press enter to filter		ADD NEW DOCUMENTS	ADD NEW FOLDERS	CLEAN ×	CLOSE ×
		Name	Size	Author	Modified	\$	Name	Path	Size	Speed Progress
									009.2 KP 52	2.4 KB / seg 100%
		Plan de Proyecto.doc	516.0 KB	Administrator	2021-02-12 10:28:30		Plantilla Documentos Word OKM	2024.docx / okm:templates/ docum	ients 606.5 Kb 33.	2.4 KD) SCg
-		-	516.0 KB 808.3 KB	Administrator Administrator	2021-02-12 10:28:30 2024-01-16 00:36:01		· Yeantilla Documentos Word OKM	2024.doox / okm.templates/ docum	ens 606,3 kB 33.	2.1107.50
-		Plantilla Documentos Word					Plantilla Documentos Word OKM	2024.doex / okm.templates/ docum	ena 600.0 KB 33	
		Plantilla Documentos Word OKM2024.docx WF Procedures.pdf	808.3 KB	Administrator	2024-01-16 00:36:01	•	Plantilla Documentos Word OKM	2024.doox / okmzempiates/ docum	ena 606,3 kB 43	
•		Plantilla Documentos Word OKM2024.docx WF Procedures.pdf  empty_content.html	808.3 KB 1.5 MB	Administrator Administrator	2024-01-16 00:36:01 2023-02-28 17:55:32	•	Plantilla Documentos Word OKM	uuu aoox / okmtempiates/ oocum	ens 000.3 KB 33	
		Plantilla Documentos Word OKM2024.docx WF Procedures.pdf  empty_content.html	808.3 KB 1.5 MB 0 Bytes	Administrator Administrator Administrator	2024-01-16 00:36:01 2023-02-28 17:55:32 2019-04-06 12:45:47	•	Plantilla Documentos Word OKM	uuun aoox ) okmaempiates/ oocum	ens 0003 no 33	

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.

		W	Plan de Proyecto.doc	516.0 KB	Administrator	2021-02-12 10:28:30			Version	1.0
		9	Plantilla Documentos Word OKM2024.docx	808.3 KB	Administrator	2024-01-16 00:36:01			Туре	application/vnd.openxmlformats- officedocument.wordprocessingml.document
		P	WF Procedures.pdf	1.5 MB	Administrator	2023-02-28 17:55:32			Size	808.3 KB
		۲	empty_content.html	0 Bytes	Administrator	2019-04-06 12:45:47	•		Author	Administrator
		0	text-template.html	387 Bytes	Administrator	2023-03-20 10:52:06			Created	2024-01-16 00:36:01 by Administrator
		A	tpl_2.pdf	21.4 KB	Administrator	2019-04-06 12:49:32			Modified	2024-01-16 00:36:01 by Administrator
		1	wf-template.odt	697.9 KB	Administrator	2020-05-05 09:23:15			Status	Active
Showi	ng 1 to	7 of	7 records				1		Parent	/okm:templates/documents
								2	Title	
								2	Description	
								+	Subscribed	×
									Subscribed users	
								+	Keywords	OpenKM × Design_2024 ×
								+	Categories	Category example ×

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

4	DASHBOARD	BROWSER	SEARCH	TASKS	EMAIL	METADATA	:			
	A HOME	٦ 🔶	TAXONOMY	•	CATEGOF	RIES 🕞 TE	MPLATES			
	← Back ← → Forward ← ↑ / okm:templates / folders									
<b>^</b>										
+ (	Create folder					FILTER	• HISTORY			

Create folder	
Path	
/okm:templates/folders	
Name	
Folder Template example	
Step into created node	
Off Off	
CREATE	CANCEL

				6		Properties	Notes	Security	Metadata	History	Relations	Workflo	w	
15 v records	FILTER	O HISTORY	Pn	ess enter to filter		Name		Business case	2					
Name	Size	Author	Modified		0	Ø UUID		be390f3e-0d1	9-4919-9be5-a	ac3507b221	7c			
Business case		Administrator	2019-04-24 19	0:00:47	•	Version		1.0						
) 📁 Docs from		Administrator	2021-03-09 12	2:15:30		Parent		/okm:templat	es/folders					
Docs to		Administrator	2021-03-09 12	2:15:40		Author		Administrator						
Employee		Administrator	2019-04-06 12	2:55:52	_	Created		2019-04-24 19	9:00:47 by Adr	ministrator				
Folder Template example		Administrator	2024-01-16 00	1:45:43		<ul> <li>Description</li> </ul>								
Project		Administrator	2019-04-06 12			+ Subscribe		×						
		Administrator	2019-04-00 12	2.54.01	_	Subscribe	ed users							
ing 1 to 6 of 6 records					1	+ Keywords								
						+ Categorie	s							
						+ Related ta	isks							
						Ø URL		https://demo3 ac3507b22f7d		oud.com/op	enkm/kcente	r/#/browser,	/uuid/be390f3e-0	d19-4919-9be5-
						() Get co	ntent infor	mation						

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

4	DASHBOARD BROWSER SEARCH TASKS	EMAIL METADATA 🚦		
	↑ HOME     ←€ TAXONOMY     ▲     C       ← Back     → Forward     ↑     /	ATEGORIES TEMPLATES MY Di okm:templates / folders	OCUMENTS 🛛 E-MAIL	TRASH
+				6
-	Show 15 v records	FILTER SHISTORY	Press ent	ter to filter
Ð	Name	Size Author	Modified	\$
P	Create from template	Administrator	2019-04-24 19:00:47	7
>	Docs from	Administrator	• 2021-03-09 12:15:30	)
<del>(</del>	Docs to	Administrator	2021-03-09 12:15:40	)
-	Employee	Administrator	2019-04-06 12:55:52	2
<b>n</b>	Folder Template example	Administrator	2024-01-16 00:45:43	3
C	Project	Administrator	2019-04-06 12:54:01	l.
٩	Showing 1 to 6 of 6 records			1
×				

A new workspace dedicated to the Templates menu opens

4	DASHBOARD BROWSER SEARCH TASKS EMAIL MET	ADATA TEMPLATES :	
	Destination /okm:templates/folders 🖍 Edit	Plan de Proyecto.doc	
G	Type 💽 Document 💽 Folder 💽 Record	Templates	
×	Press enter to filter	Context Filter Taxonomy V Folder Record	
	Name		
	Plan de Proyecto.doc	Search Navigation	
	Plantilla Documentos Word OKM2024.docx	/ okm:root	0
	WF Procedures.pdf	Path	
	empty_content.html	AutoCAD	0
	text-template.html	Automation	0
		Categories	0
	▶ tpl_2.pdf	Documents to compare	0
	The wf-template.odt	EDX	0
	CREATE	Edit	0
		Expiration	0
		<b>FOLDER</b>	$\otimes$
		Mails	0
		<u>OMR</u>	0
		Showing 1 to 10 of 20 records	1 2 Next Last
		ACCEPT	CANCEL

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

DASHBOARD BROWSER SEARCH TASKS EMAIL METADATA TEMPLATES	
Destination /okm:root/FOLDER 🖌 Edit	
Name	
Test word document	.docx
Copy related information Categories Notes Keywords	
NEXT	CANCEL
	Destination /okm:root/FOLDER ✓ Edit Name Test word document Copy related information Categories  Notes  Keywords

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

0	DASHBOARD BROWSER SEARCH TASKS EMAIL ME	TADATA TEMPLATES :	
	Created (1)		^
G	Main Part of the second		
×	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 :		
		NTS 🛛 E-MAIL 📋 TRASH	
	← Back → Forward → ↑ / okmroot / FOLDER		
<b>†</b>		<b>G</b>	Properties         Notes         Security         Metadata         History         Preview           References         ChatGPT <t< th=""></t<>
+	Show 15 V records	Press enter to filter	Name     Test word document.docx
(±	Name         ♦ Size         Author	Modified \$	<b>UUID</b> 2bd24410-45ae-4092-b157-2c83707ce1cf
<b>•</b>	Normativa_de_matricula_master_julio_2 312.0 KB Administrator	2024-01-16 00:06:09	Version 1.1
>	OpenKM Brochure - España - España - pdf 1.5 MB Administrator      OpenkM Brochure - Kapaña - pdf 1.5 MB Administrator      OpenkM Brochure - Kapaña - pdf 1.5 MB Administrator	2024-01-16 00:06:10 2024-01-16 01:02:56	Type application/vnd.openxmlformats- officedocument.wordprocessingml.document
<b>₽</b>	Showing 1 to 3 of 3 records	2024-01-16 01.02.56	Size 808.3 KB
ñ			Author Administrator
G			Created 2024-01-16 01:02:55 by Administrator
Q			Created from Plantilla Documentos Word OKM2024.
×			Modified 2024-01-16 01:02:56 by Administrator
			Status Active
			Parent /okm:root/FOLDER
			Description
			+ Subscribed X
			Subscribed users
			+ Keywords OpenKM × Design_2024 ×
			+ Categories Category example ×

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

0	DASHBO/	ARD BROWSER SEARCH TA	SKS EMAIL METADATA TEN	PLATES :						ADMINISTRATOR -
	Created	(1)				tpl_2.p	jt			
с	🗐 /okn	n:root/FOLDER/Test word doci	ument.docx			1	Q ↑ ↓[	1 de 1	— 🕂 Tamaño automático 🗸 🗸	⊕ R  ≫
×	Destina	ntion /okm:root/FOLDER 🖌 Ec	dit							
	Туре	🚺 Document 💽 Folder (	Record				6l.	4		
	Press e	inter to filter					Sample	template form		
	Nam					\$	Name Birth Date		]	
		i de Proyecto.doc					Language			
	-	tilla Documentos Word OKM20 Procedures.pdf	24.docx							
		ty_content.html								
		template.html								
	⊫ tpl_2	2.pdf								
	🖹 wf-te	emplate.odt								
	CR	<b>EATE</b>								
		DASHBOARD	BROWSER SEA	RCH TASKS	EMAIL METADA		PLATES	:		
								•		
		Created (1)								^
~										
C		/okm:root	/FOLDER/Test v	ord documen	it.docx					
×										
		Name TEST	FORM.pdf							
		Destination	/okm:root/FOLD	ED 🖌 Edit						
		Destination	OKIII.IOOU/FOLD							
		Name	John Doe							×
		Birth Date	1968-01	30	×					
		Dirtir Dute	1908-01	50	^					
		Language								
		Language	Java							<b>*</b> ×
		LID/T								
		NEXT								CANCEL



	DASHBOARD BROWSER SEARCH TASKS EMAIL METADATA :			
	♠ HOME     ⊷€ TAXONOMY     ♣ CATEGORIES     ► TEMPLATES     ≗ MY DOCUMENTS     ≅ E-MAIL       ← Back → Forward	TRASH		
<b>^</b>		G.		Properties Notes Security Metadata References ChatGPT
+	□ Q ↑   ↓ 1 de 1 −   + Tamaño automático ∨	₩,	>	+ Add metadata group 🖍 Edit 📱 Delete
Đ				Sample Template Name John Doe
				Birth Date 1968-01-30
>	Sample template form			Language Java
<b>₽</b>	Name John Doe			
n]	Birth Date 1968-01-30		•	
G	Language Java			
۹				
×				

Tutorial video: <u>https://youtu.be/EY2G4\_Jqros</u> (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
g25	



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

Let's go to the trash section.	TRASH
--------------------------------	-------

<b>ö</b> 🛌				G				
Show 15 v records	FILTER	PREVIEW 🧐	HISTORY	Press enter to filter				
Name	Size	Author	Date	🔷 Input 1 🛛 Inp	out 2			
🗌 🍯 Calencario - v- 19-2021.xlsx	23.6 KB	Administrator	2022-02-09 19:19	:17				
🔲 🔎 facture1.pdf	127.5 KB	Administrator	2022-02+09 19:19	:17				
Showing 1 to 2 of 2 records					1			
Fig26								

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

Restore			

Do you really want to restore the node "facture1.pdf"?

RESTORE	CANCEL
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<sup>1</sup> 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.

Confirmation	
Do you really want to lock the node "( 2022.doc"?	OpenKM Partnership Agreement
ACCEPT	CANCEL
	0

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 )

	FILTER P	REVIEW 🚯 HIS	TON				Properties Signatures	Notes Refere		Metadata	History	
Show 15 v records	FILLER P	REVIEW +9 HIS	TURY	Press enter to filter			Name		OpenKM Partnership Agreement 2022.do			
Name	Size	Author	Date	🔶 Input 1	Input 2		UUID		7db6efc6-620	5-4ce1-9643-c	7d7625e94e8	
Facture2.pdf	9.5 KB	Administrator	2022-02-09 19:19	:17			Version		1.3			
🗌 📙 Facture3.pdf	25.5 KB	Administrator	2022-02-09 19:19	:17			Туре		application/m	sword		
OpenKM Partnership     Agreement 2022.doc	560.0 KB	Administrator	2022-02-09 19:34	:29 label1	label2		Size		560.0 KB			
🗌 📙 facture1.pdf	127.5 KB	Administrator	2022-02-09 19:19	:17			Author		Administrator			
Showing 1 to 4 of 4 records					1		Created		2022-02-09 19	:22:31 by Adm	ninistrator	
					_		Modified	ł	2022-02-09 19	:34:29 by Adm	ninistrator	
							Status		Locked on 202 Administrator	2-02-09 19:40	:24 by	

Fig29

Fig28

### 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 "subcribed". Automatically, we will see a check in blue an our name on the list of subscribed users.

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

Tutorial video: <u>https://youtu.be/-1QxGVDfRyl</u> (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



Download document	Press enter to filter
□     Name     □     Date       □     ▶     Facture2.pdf     □       □     ▶     Facture2.pdf     □	🔷 Input 1 Input 2
Facture2.pdf     Download document     inistrator     2022-02-	
	09 19:19:17
Facture3.pdf     Facture3.pdf     Save document as PDF	09 19:19:17
	-09 19:34:29 label1 label2
	09 19:19:17
Showing 1 to 4 of 4 records Move Add bookmark Delete Purge	
Notification	
Cryptography  More  Cryptography	
<ul> <li>Sign document</li> <li>Stamp</li> <li>PDF-Tools</li> </ul>	•
<ul> <li>Start workflow</li> <li>Web page import</li> </ul>	

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.



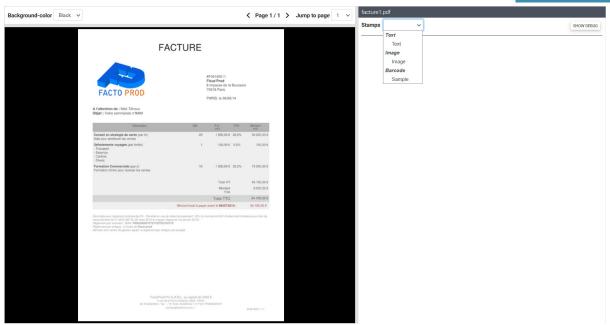


Fig.31

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

Background-color Black v	Stamp background-color	~	< Page 1/1	> Jump to page 1 v	facture1.pdf		
					Stamps Text V		SHOW DEBUG
		FACTURE			Name	Text	
					Туре	Text	
		#F06140011 Flouz'Prod 8 impasse de la	Boussole		Description	Approved document with document name and date	
	FACTO PROD	75018 Paris PARIS, le 06/06	14		Text	Approved	
	A l'attention de : Matt Téhous Objet : Votre commande n'####				Layer	Over content	
	Description Conseil en stratégie de vente (par hr)	One P.U. (HT) 20 1 500 💦	TVA Montant (HT) 20,0% 30 000,00 €		Opacity	0.7	
	Aide pour amélioner les ventes Défraiements voyages (par forfait) - Transport		5,5% 100,00 €		Font size	24	
	- Essence - Cartine - Divers Pormation Commerciale (par jr)	3 1000 100	20.0% 15 000.00 €		Color	#FF0000	
	Formation d'intro pour booster les ventes	2022 Total HT	45 100.00 €		Align	Center	
		Ned Trial TTC	9 005,50 € 54 105,50 €		Rotation	40	
	NOP	Montant total à payer avant le 66/07/20	I4 : 54 105,50 €		ExprX	PAGE_CENTER	
	Escompte pour règlement anticipie d'une - Pér recouvement (loi n° 2012 407 du 12 mars 201, Réglement par vinnent : (IDAN: FR953000573 Réglement par chique : à l'ordin de <b>Facto pero</b> Montere d'un centre de gestion agréé, le règlem	d	nnité forfaitaire pour Itais de		ExprY	PAGE_MIDDLE	
							STAMP
		FactoProd Pro S.A.R.L. au capital de 5422 € 5 nu de la Parez Potoria 7500 PA/IS 14565 // fac: / N°56455425342 / N°TYA: FR0530005737 contact@radomos.com /	#F06140011 1/1				
			arren avenue (1 b)				

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: <a href="https://youtu.be/DgmY4mTOPPY?feature=shared">https://youtu.be/DgmY4mTOPPY?feature=shared</a>

(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.

DASHBOARD BROWSER SEARCH TASKS EMAIL	METADATA MAIL ACCOUNTS	1				ADMIN
		Info	Filters Messages			
User	Active	+ Impo	irt			
demo.openkm@gmail.com	×		From	Subject	Received	
demo.openkm@gmail.com	×		google-web-toolkit@googlegroups.com	Abridged summary of google-web- toolkit@googlegroups.com - 3 updates in 2 topics	2017-01-23 14:09:14	
demo.openkm@gmail.com	×		google-web-toolkit@googlegroups.com	Abridged summary of google-web-	2017-01-24 14:06:44	
demo.openkm@gmail.com	×			toolkit@googlegroups.com - 4 updates in 3 topics		
demo.openkm@gmail.com	~		google-web-toolkit@googlegroups.com	Abridged summary of google-web- toolkit@googlegroups.com - 10 updates in 6 topics	2017-01-25 14:07:57	
demo.openkm@gmail.com	×		google-web-toolkit@googlegroups.com	Abridged summary of google-web- toolkit@googlegroups.com - 8 updates in 4 topics	2017-01-26 14:08:08	
	User demo.openkm@gmail.com demo.openkm@gmail.com demo.openkm@gmail.com demo.openkm@gmail.com demo.openkm@gmail.com	Image: Constraint of the second se	User Active + Impo demo.openkm@gmail.com × demo.openkm@gmail.com × demo.openkm@gmail.com × demo.openkm@gmail.com × demo.openkm@gmail.com ·	Info     Filters     Messages       User     Active       demo openkm@gmail.com     ×       google-web-toolkit@googlegroups.com       demo openkm@gmail.com     ×       demo openkm@gmail.com     ×	Info       Filters       Messages         User       Active       From       Subject         demo openkm@gmail.com       ×       google-web-toolkit@googlegroups.com       Abridged summary of google-web- toolkit@googlegroups.com       Abridget summary of google-web- toolkit@googlegroups.com         demo openkm@gmail.com       ~       google-web-toolkit@googlegroups.com       Abridget summary of google-web- toolkit@googlegroups.com       Abridget summary of google-web- toolkit@googlegroups.com         demo openkm@gmail.com       ×       google-web-toolkit@googlegroups.com       Abridget summary of google-web- toolkit@googlegroups.com       Abridget summary of google-web- toolkit@googlegroups.com	Info       Filters       Messages         User       Active         demo openkm@gmail.com       x         google-web-toolkit@googlegroups.com       Abridged summary of google-web- toolkit@googlegroups.com       2017-01-23 14.09.14         demo openkm@gmail.com       x       google-web-toolkit@googlegroups.com       Abridged summary of google-web- toolkit@googlegroups.com       2017-01-25 14.07.57         demo openkm@gmail.com       x       google-web-toolkit@googlegroups.com       Abridged summary of google-web- toolkit@googlegroups.com       Abridged summary of google-web- toolkit@googlegroups.com       2017-01-25 14.07.57         demo openkm@gmail.com       x       google-web-toolkit@googlegroups.com       Abridged summary of google-web- toolkit@googlegroups.com       2017-01-26 14.08.08

Fig.33

Users with administration privileges have access to all user emails.

•	DASHBOARD BROWSER SEARCH TASH	KS EMAIL METADATA 🚦											ADMIN -
	$\begin{array}{c c} \hline \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ $	CATEGORIES TEMPLATES	MY DOCUMENTS E-MAIL	TRASH	ł								
+			Ē		P	operties	Notes	Security	Metadata	History	Relations	Workflow	
	Show 15 v records	FILTER SHISTORY	Press enter to filter		0	Name	a	dmin					
æ	Name	Size Author	Date	¢	0	UUID	ea	a223f2a-c752-	44ca-b195-9	12e5234c2e	ee		
	admin	Admin	2016-04-06 17:14:28			Version	1.	.0					
	🗌 늘 board	board	2015-02-20 12:03:20	11		Parent	/c	okm:mail					
>		crm	2015-10-16 17:17:02	1		Author	A	dmin					
<b>£</b>	crmAdmin	crmAdmin	2015-10-16 17:17:20		•	Created	20	016-04-06 17:1	4:28 by Adm	hin			
n I	director	director	2016-07-27 17:55:37	11	/	Descriptio	n						
с		EDX	2021-03-02 18:59:13	11	+	Subscribe	d >	×					
Q				11		Subscribe	d users						
Î		Human Resources	2022-02-01 17:01:18	-11	+	Keywords							
Fig.3		icenter	2016-08-04 17:50:11			C-+	-						

Fig.34

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

Pro	operties	Notes	Security	Metadata	History	Preview	Relations	
Ø	Name		Plantilla Docum	nentos Word (	0KM2024.do	сх		Título principal
Ø	UUID		c6165145-a0a0	)-462b-b3a6-{	5aa9b72aaa(	00		del documento Subtítulo principal
	Version		1.0					
	Туре		application/vnc officedocumen			ment		Q
	Size		808.3 KB					
	Author		Administrator					Copenium .
	Created		2024-01-17 19:	43:35 by Adm	inistrator			
	Modified		2024-01-17 19:	43:35 by Adm	inistrator			
	Status		Active					
	Parent		/okm:root/FOL	DER				
/	Title							
/	Description	ı						
+	Subscribed	l.	×					1
	Subscribed	users						
×	Indexable		~					
+	Keywords							



## Available options for folders, logs, and emails:

Pro	operties Notes	Metadata History Relations
Ø	Name	FOLDER
Ø	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
1	Description	
+	Subscribed	×
	Subscribed users	
+	Keywords	
+	Categories	
+	Related tasks	
Ø	URL	https://demo302.openkmcloud.com/openkm/kcenter/#/browser/uuid/b650056d-224a-47a9-a32b- db14966c4b61
	③ Get content info	ormation
	<ul><li>Propert</li><li>Notes</li></ul>	ies tab

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



## Available options for documents:

Pro	operties Not	tes Metadata History Preview Relations
Ø	Name	OpenKM Brochure - Español - España.pdf
ø	UUID	d4af3a44-2711-4109-b623-e82f6bd7d72a
	Version	1.0
	Туре	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
/	Title	
/	Description	
+	Subscribed	×
	Subscribed us	ers
×	Indexable	$\checkmark$
+	Keywords	
	•	erties Tab
	<ul> <li>Notes</li> </ul>	
		ry (version control)
	• Previ	
		tionships tab
	<ul> <li>Activi</li> </ul>	
	• Work	
		icted Text tab

• Property Group Tab (Metadata)

## Video tutorial:

• Explorer & Properties: <u>https://academy.openkm.com/mod/resource/view.php?</u> 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

Pro	perties	
Pro	perties Notes	Metadata History Preview Relations
ø	Name	OpenKM Brochure - Español - España.pdf
p	UUID	d4af3a44-2711-4109-b623-e82f6bd7d72a
	Version	1.0
	Туре	application/pdf <b># openkm</b> ECM-BPI@cchure
	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
/	Title	
/	Description	
+	Subscribed	x
	Subscribed users	
×	Indexable	
+	Keywords	
+	Categories	
+	Related tasks	
Ø	URL	https://demo302.openkmcloud.com/openkm/kcenter/#/browser/uuid/d4af3a44-2711-4109-b623-e82f6bd7d72a
<b>T</b> L -	Share preview	© Generate link
ING		tab displays essential data such as: me of the content
		niversal 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

Properties	Notes 1	Metadata	History	Preview	Relations		
+ Add note	Show history					± Download	↑ Ascending order
Author: Adm	ninistrator					2024-01	-17 20:22:18 💉 🗵
POST-IT							

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

Properties Notes Metadata History Preview Relations	
+ Add metadata group 🖌 Edit 🔋 Delete	
Consulting Doc Type	
Input label 1 label 1	
Input label 2 label2	

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.

Properties	Notes Metadata	History Preview Relations		
Compact	C 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	<ul> <li>Show</li> <li>Download</li> </ul>
1.1	Administrator	2024-01-17 20:25:37	1.5 MB	<ul> <li>Add comment</li> <li>Delete</li> </ul>
1.0	Administrator	2024-01-17 19:43:34	1.5 MB	← Restore

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.

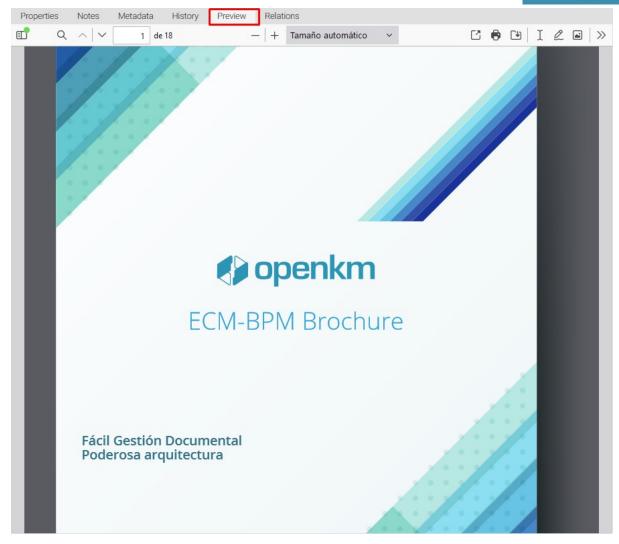
Q, ^   ~ 1 de 2	- + Tamaño automático v	C • B I 2
	John Hardware         INVOICE         [Company Name]         INVOIC           Cheminal Precision Pre	2004
	Statute         5         1,400         5         1,600         5         1,600         5         1,600         5         1,600         5         1,600         5         1,600         5         1,600         5         1,600         5         1,600         5         1,600         5         3         3         1,510         1,500         1,500         1,500         1,500         5         3         1,510         1,500         1,510         1,500         1,500         1,500         1,500         1,500         1,500         1,500         1,500         1,500         1,500         1,500         1,500	91.00 94.00 27.94

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

UNSTBURNU BRUNSER SERRUT INSKS EMMIL MELAUATA :			AUMINISTRATOR -
Version 1.4   Version 1.3   Metadata		Changelog	OpenKM Brochure - Español - España.pdf
Consulting	Version 1.4	Consulting	Version 1.3
Imput label 1 label 1 Imput label 2 label2		Input label 1 label 1 Input label 2 label 2	
Doc Type	Version 1.4	Doc Type	Version 1.3
Type Sales		Type Marketing	

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

CANCEL
ć



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

(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.

Properties	Notes	Security	Metadata	History	Preview	Relations	Workflow	
Extracted text	Signat	ures Re	eferences					
1 Introduction 2 Create folder to 3 EDX Module 4 Creating users 5 EDX for the use My Documents 6 Upload 7 News 8 Search 9	emplates . in the ED> er	<						^
C/ Bunyola 13 – 3	Palma de	Mallorca – I	Islas Baleares -	- España – (	)7004 – +34 6	505 074 544 -	www.openkm.com	1 p.
1 Introduction The Electronic D documentation between the org that it allows the creati	anization t	hat uses Op	enKM and its c	lients and st	akeholders. C		exchange of lules' advantages is	3
the documentation e	e Templat exchange b stance with	petter. 1 the Electro	Ť				nplates, to manage emplates configur	

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.

•	DASHBOA	RD BROWSER SEARCH	TASKS EMAIL METAI	DATA :	
	Basic	Advanced Metadata			Show default View
	Results	Context	Туре		
•	15	✓ Taxonomy	v 🚺 Do	ocument 💽 Folder 💽 Record 💽 E-mail	
С	Date rang	je between			
×	E F	rom		То	
	Name			Content	
	User			MIME type	
	-		\$	- \$	
	SAV	ESEARCH		CLEAN	
Fig.39					

Tutorial video: htthttps://youtu.be/eZhpmdmnlpw?feature=shared

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

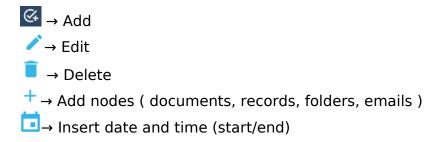


## 1.3.11 Task manager

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:



### **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.

Task list	Period			<b>C</b> 1-1-1-		Task Notes	History
	Project	Туре		Status		✓ Edit 🔋 Delete	
Active tasks	× -	× -		× -	~	Ø Subject	reunión dpto MK
Show 15 v records				Filte	er 🛛 🗙	Owner	Administrator
Subject	Last modified	🔶 Start	♦ End	Progress	\$ Status	Start	2022-02-10
reunión dpto MK	2022-02-09	2022-02-10	2022-02-10	Þ0 %	In progress	Status	In progress
reunión dpto marketing	2022-02-04	2022-02-07	2022-02-07	20 %	In progress	Project	ABC
Showing 1 to 2 of 2 records					1	Туре	Administrative
						User	Manager
						Notification	Jsers EDX, Administrator
						Nodes	Abridged summary of contracts-require
						Ø URL	https://demo201.openkmcloud.com/openkm,
						Ø Description	

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.

4	DASHBOARD BROWSER SEARCH TA	ISKS EMAIL METADATA	:				
							Task Notes
$\sim$	Task list	Project	Туре		Status		🖌 Edit 🔋 Delete
€+	Active tasks V		× -		× -	~	Subject
Ê	Show 15 v records				Filte	r ×	Owner
Û	Subject	Last modified	🔷 Start	End	Progress	Status	Start
	reunión dpto MK	2022-02-09	2022-02-10	2022-02-10	20 %	In progress	Status
G	reunión dpto marketing	2 States list					
×	Showing 1 to 2 of 2 records	+ Add					
		Name					Finish
		Finished					
		In progress					X 🖉 🛛
		Not started					X 🖉 🗵
							CLOSE

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.

Task list	Project	Туре		Status		Task No
Active tasks	•	<ul> <li>-</li> </ul>		▼ -	~	Subject
Show 15 v records				Filte	r X	Owner
Subject	Last modified	🔶 Start	End	Progress	Status	Start
reunión dpto MK	2022-02-09	2022-02-10	2022-02-10	20 %	In progress	Status
reunión dpto marketing Showing 1 to 2 of 2 records	2 Project list					
	+ Add					
	Name					Active
	ABC					<ul> <li>/</li> </ul>
	XYZ					<ul> <li>I</li> </ul>

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):

Task	Notes H	istory							
🖌 Edit	Delete								
🛛 Su	ıbject	mk meeting							
Ov	vner	Administrator	Created	2022-02-09 20:21:02					
St	art	2022-02-10	End	2022-02-10					
St	atus	In progress	Progress	20 %					
Pr	oject	ABC							
Ту	pe	Administrative	Administrative						
Us	ser	Manager	Manager						
No	otification Users	<b>s</b> Admin, Administ	rator						
No	odes	EDX							
		OpenKM Pa	artnership A	greement 2022.doc					
0 UF	RL.	https://demo201 /kcenter/#/tasks		oud.com/openkm					
De De	escription								
<				>					
Fig.43									

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

Choose node		
Context	Filter	
Taxonomy	✓ Document ● Folder ● Record ● E-mail	
Search Navigation		
Press enter to filter		<b>२</b> ×

### 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:

Task	Notes	History	
Owner		Admir	nistrator
Created		2022-(	02-09 20:21:02
Subject		mk n	neeting
Start			2022-02-10 × Remin
End			2022-02-10 × Remin
Project		ABC	;
Туре		Adm	ninistrative
Status		In pi	rogress
Progres	s	20%	à ◆ ×
User +	<b>L</b>	Mar	nager ×
Notifica	tion Users +	<b>R</b> Adn	nin × Administrator ×
Nodes	+	<b>×</b> 4	Abridged summary of contracts-requiremen
		E E	EDX × ØpenKM Partnership Agreer
Descrip	tion		
<			×
UP	DATE		CANCEL

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.

Active tasks	✓ -		v -	~ -		
Assigned tasks						
Active tasks					Filter	×
Notified tasks		A 01 1		ά D	A 01 1	
Closed tasks	ed	🔶 Start	End	Progress	Status	
mk meeting	2022-02-09	2022-02-10	2022-02-10	20 %	In progress	





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: <u>https://youtu.be/mk3fMo\_xcbs?feature=shared</u> (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: <u>https://academy.openkm.com/course/view.php?id=10</u>
  - 2. Youtube. OpenKM channel <u>https://www.youtube.com/user/openkm</u>
  - 3. User guide. OpenKM http://docs.openkm.com/kcenter/