OpenKM

User Guide

User Guide

OpenKM is a tool to manage documents generated within a company, to improve access within the whole corporate environment and to endeavour to keep in check the unnecessary duplication of information.

OpenKM provides the solution to:

- Control the growing volume of information to be managed
- End the diversification of information storage sources
- Prevent the duplication of information
- Obtain valid information through the control of document versions
- Reduce time and resources used in locating information
- Avoid knowledge leaks or wrongful access by users, thereby complying with the obligations set out in the LOPD (Spanish Data Protection Law)
- Restrict non-authorized users access to the information.

Through the OpenKM system, relevant and useful information can be accessed and found in the least possible time to resolve problems and make decisions.

OpenKM helps to improve corporation processes, integrating common tasks (and interrelated tasks) into one single tool and permitting the different departments of the organization controlled and supervised parametrizable access to the information.

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  - Contacts

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- Google contacts synchronization
- Forum
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System access

System access is performed via a web browser using the URL where your OpenKM installation is hosted. In the access screen you must enter the user name (Login) and the password that has been provided by the system administrator.

Up to version 4

Language can not be selected.

Desktop screen

On accessing the system, a desktop is displayed with five different well-defined workspaces: Menu Options, Toolbar, Folder Tree, Document Browser and Document and Folder Properties, as well as information on the user who is connected at that time.
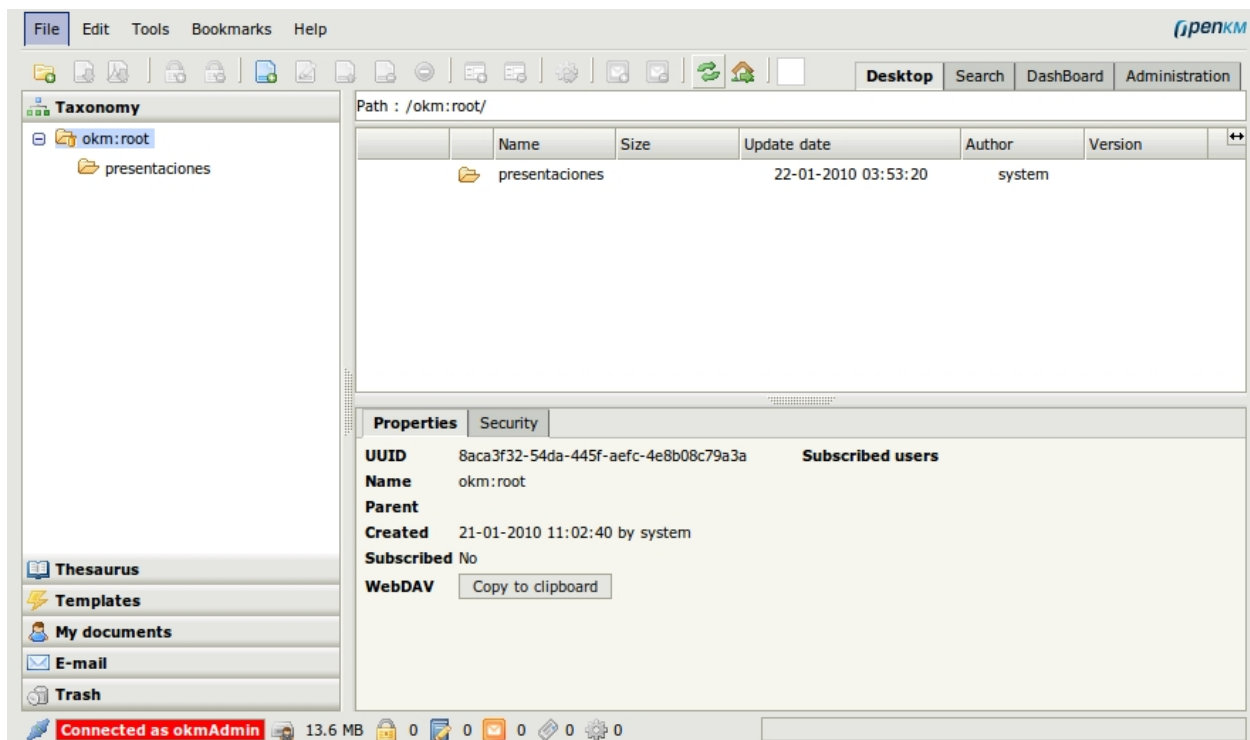
Menu bar

The menu bar is formed by all the pull down menus with their different options. If an option within a menu appears greyed-out, this option is not available.

Detail of the functions according to their icons:

- → Create a new folder
- → Add new document
- → Download document
- → Send document link
- → Send document attachment
- → Empty trash
- → Exit application
- → Lock document
- → Unlock document
- → Document edit (check-out)
- → Upload modified document (check-in)
- → Cancel document edit
- → Move document to user's Trash.
- → Copy document
- → Move document
- → Rename document
- → Submenu of available languages
- → Submenu of available skins
- → Debug console in event of errors
- → Skip to folder or document set as home by the user
- → Add document or folder to bookmark list
- → Edit bookmark list
- → Link to OpenKM documentation
- → Link to report errors (bugs)
- → Link to Support-request form
- → Link to forum
- → Link to changes in each version (changelog)
- → Link to application website
- → Application information
- → Download file as pdf
- → Export to ZIP
- → Administration

Toolbar

The toolbar is made up of buttons with the main functions that the user will most frequently use. As with the menu bar, occasionally the buttons will appear greyed-out, meaning that they are not available.

Detail of the functions according to their icons:

- 🗀 → Create a new folder
- 🗃 → Find a folder
- 🗎 → Download document
- 🗎 → Download as pdf document
- 🔒 → Lock document
- 🔓 → Unlock document
- 🗋 → Add new document
- 🖨 → Print a document
- 🖉 → Document edit (check-out)
- 🗋 → Upload modified document (check-in)
- 🗋 → Cancel document edit
- ⊖ → Move document to user's Trash.
- 🗐 → Add group of properties to a document (metadata)
- 🗐 → Delete group of properties from a document (metadata)
- 🗐 → Subscription is added to a document or folder. Any modification that is made will be notified to the user by email.
- 🗐 → Delete subscription to a document or folder
- ⚙ → Start workflow
- 🔁 → Refresh user interface
- 🏠 → Skip to folder or document set as home by the user
- 🖥 → Scanning
- 📤 → Uploading
- ✥ → Application splitters resize

User identification

In this space of the desktop screen the user identification who is connected in this session is identified.
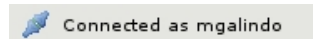
In the event of detecting some user with **AdminRole** as the user, the identifier will appear in another colour, with the purpose of indicating that operations are being carried out under a "super-user" without any restrictions of document access.

Changes from version 3.0 to 4.0

In OpenKM version 3.0 and olders, there was only one username with administrator grants called okmAdmin.

Status bar

In this space of the desktop screen the user access to some general information like his repository size used, number of locked documents, number of checkout documents (edited), subscribed folders and documents, number of news pending to reading and number of workflow task pending assigned to the user.
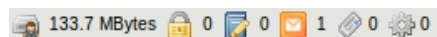
At the right corner, there's a status message bar that OpenKM uses to show some information to User
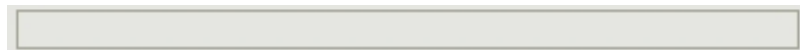
Workspace

The workspace allows you to change between Search and the list of folders and documents.
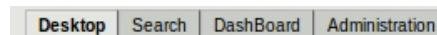
There are four tabs to enable the four work modes:

- **Desktop**: Mode to carry out the main tasks with folders and their documents (create, add, move, download, etc.).
- **Search**: Mode to search documents.
- **DashBoard**: Mode to access workflow, user documents view, general document view and news push service.
- **Administration**: Administration utilities, only available for users with AdminRole grant.

Changes from version 3.0 to 4.0

In OpenKM 3.0 and older versions, administration tab was only accessible by okmAdmin user.

Path

The path permanently indicates your location within the tree (Taxonomy, Thesaurus, Personal, etc. depending on the view you have enabled at any given moment).

Path : /okm:root/

Taxonomy

Firstly, on the left of the desktop, is the Folder Tree or also called the Taxonomy. It displays a view of the repository distribution grouped by folders. There are various types of folders symbolised by the following icons:

- 📂 → The folder has no more subfolders
- 📁 → The folder contains subfolders
- 📂 → The folder is read-only and has no more subfolders
- 📁 → The folder is read-only and contains subfolders
- 📂 → You are subscribed to the folder and it has no more subfolders
- 📁 → You are subscribed to the folder and it contains subfolders
- 📂 → You are subscribed to the folder, it contains no subfolders and is read-only
- 📁 → You are subscribed to the folder, it contains subfolders and is read-only

Basic functions with the mouse

- By clicking with the right mouse button a pop-up menu will appear. In this menu there are options to create new folders, delete, rename, etc.
- Drag & drop. By selecting a document or folder and keeping the left mouse button held permanently down, you can move a document or folder to a node of the tree (Taxonomy).

Pop-up menu
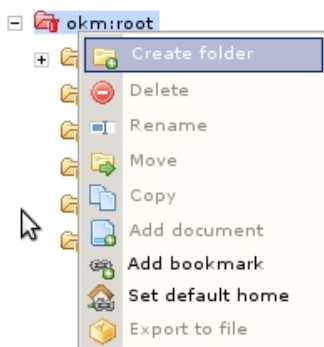
Description of the different options

- 📁 → Create a new folder
- ⛔ → Delete folder.
- ▭ → Change the name of the selected folder.
- 📁 → Change the localization of the selected folder to another position on the tree, together with all the documents and folders it may contain
- 📄 → Duplicate the folder and its contents in another place on the tree.
- 📄 → Add new document
- 🐝 → Add a folder or document to the bookmarks

- 🏠 → Set the folder or document as user home
- 📦 → Create a zip file with all the contents of the folder recursively, maintaining the folder structure.

Document browser

In the upper section the document browser can be seen. The document browser allows you to view the list of documents and subfolders available on a specific node of the tree (Taxonomy).

		Name	Size	Update date	Author	Version
	📂	OpenKM		28/10/2008 17:56:56	admin	
	📄	Ibacar	5.8 MBytes	27/10/2008 17:09:08	admin	1.1

Basic functions with the mouse

- Double-click with the left button on a folder, open the folder.
- Double-click with the left button on a document, download the document.
- Click with the right button and a pop-up menu will appear.
- Drag & drop. By selecting a document or folder and keeping the left mouse button held down, you can move a document or folder to a node of the tree (Taxonomy).

Pop-up menu

		Name	Size	Update date	Author	Version
	📂	Folletos		21-07-2010 07:14:19	okmAdmin	
	📄	Download	789.0 KB	21-07-2010 07:14:30	okmAdmin	1.0
	📄	Check out	8.4 MB	21-07-2010 07:14:26	okmAdmin	1.0
	📄	Check in	8.5 MB	21-07-2010 07:14:29	okmAdmin	1.0
	📄	Check out cancel	3.8 MB	21-07-2010 07:14:12	okmAdmin	1.0
📝	📄	Lock	5.9 MB	21-07-2010 07:14:19	okmAdmin	1.0
	📄	Unlock stic	5.7 MB	21-07-2010 07:14:18	okmAdmin	1.0
	📄	Delete stic	8.0 MB	21-07-2010 07:14:25	okmAdmin	1.0
	📄	Rename pt	9.5 MB	21-07-2010 07:14:31	okmAdmin	1.0
	📄	Move	5.8 MB	21-07-2010 07:14:12	okmAdmin	1.0
	📄	Copy	7.8 MB	21-07-2010 07:14:32	okmAdmin	1.0
	📄	Add bookmark	6.0 MB	21-07-2010 07:14:29	okmAdmin	1.0
	📄	Set default home	8.3 MB	21-07-2010 07:14:14	okmAdmin	1.0
	📄	Export to ZIP	7.6 MB	21-07-2010 07:14:23	okmAdmin	1.0

Description of the different options

- 📥 → Download document
- 📝 → Document edit (check-out)
- 📤 → Upload modified document (check-in)
- ❌ → Cancel document edit
- 🔒 → Lock document
- 🔓 → Unlock document
- ⛔ → Move document to user's Trash.
- ▭ → Change the name of the selected folder or document.
- 📁 → Change the location of the folder or document selected to another place on the tree
- 📋 → Duplicate the folder and its contents or another document to another place on the tree.
- 🔖 → Add a folder or document to the bookmarks

Up to version 4.x and above

Preview images and videos are done in separate popup window. From version 5.x and upper preview enhancement is integrated in only one panel for all document mime types. Play a multimedia file and Display images popup menu are only available in version 4.x and older.
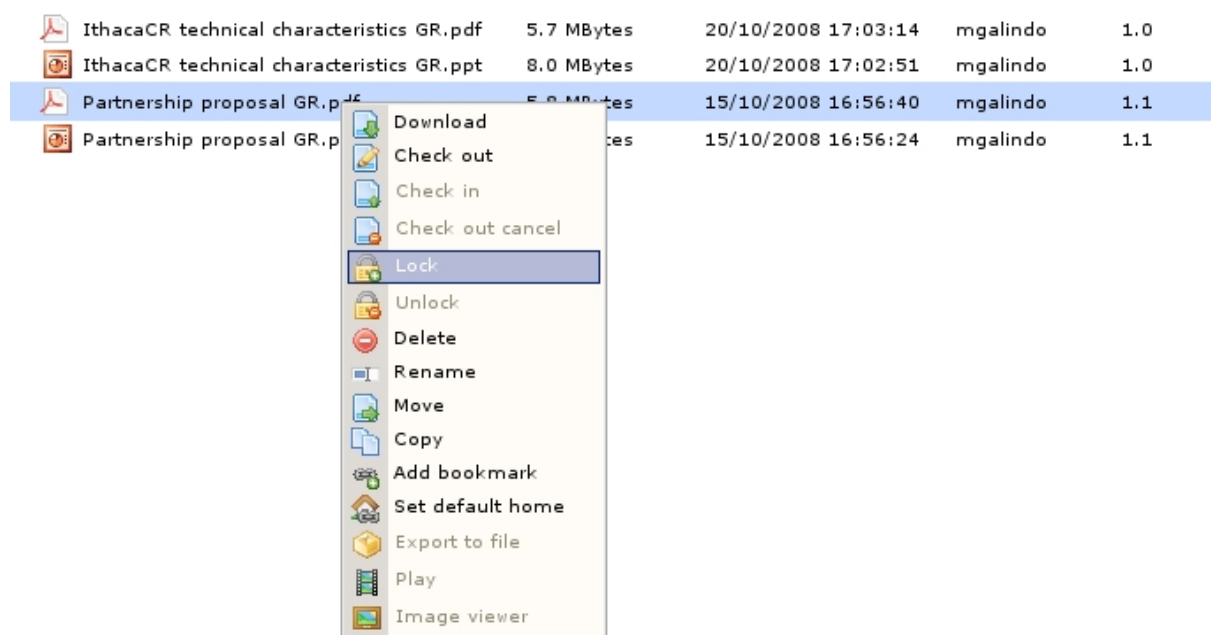
Description of the different options

- → Play a multimedia file: FLV, MP3, WAV, etc
- → Display images without having to download them, type: GIF, JPG, PNG, etc

Properties panel

In the lower part are detailed the Document or folder properties with security, history, general properties and specifics concerning documents defined by users (document parametrization).

Options available for folders

- Security tab.
- Properties tab.

Properties	Security
UUID	80ae36d7-9133-49a1-b59f-649df0a75d71
Name	test
Parent	/okm:root
Created	10-07-2010 07:59:58 by okmAdmin
Subscribed	Yes
Folders	0
Documents	0
Mails	0
URL	
WebDAV	

Subscribed users
okmAdmin

Options available for documents

- Security tab.
- Properties tab.
- History tab (version control).
- Notes.
- Tabs of property groups.
- Preview tab

Properties	Notes	Security	History	Preview

UUID	c98ef532-6b6a-4787-8708-10f3d3dc9ba9
Name	text_file.txt
Folder	/okm:root
Size	43 Bytes
Created	10-06-2010 08:46:17 by okmAdmin
Modified	10-06-2010 08:46:17 by okmAdmin
MIME type	text/plain
Keywords	

marketing ⊖   test ⊖

Status	Available
Subscribed	No
History size	43 Bytes
URL	
WebDAV	

Subscribed users

Keywords cloud
marketing   test

Categories

Basic operations with documents and folders

Taxonomy

Taxonomy is defined as a knowledge tree via which the company organises its information. The side panel of the desktop offers a view of the taxonomy of concepts, organised in a hierarchical folder structure.

Categories

Categories is defined as knowledge tree via which the companies organises its information as a repository view organized by categories and subcategories. The side panel of the desktop offers a view of the categories concepts, organized in a hierarchical folder structure. Must understand that's only a special way to view repository, but really repository is organized physically as you can see in taxonomy view.

Thesaurus

A thesaurus is a book that lists words grouped together according to similarity of meaning (containing synonyms and sometimes antonyms), in contrast to a dictionary, which contains definitions and pronunciations. Thesaurus is defined as knowledge tree via which the companies organises its information as a repository view organized by terms. The side panel of the desktop offers a view of the terms concepts, organized in a hierarchical folder structure. Must understand that's only a special way to view repository, but really repository is organized physically as you can see in taxonomy view.

The jerarquical relations between terms, depending about how thesaurus is defined.

Personal documents

The user's personal documents is a personal knowledge tree of each user where they can save any type of document. These are only accessible by the user themselves.

Templates

Contains document templates that can be used as a base by users to create other new documents.

E-mail

Contains imported personal mails, text and attached documents, from mail account user using IMAP mail service.

Create folder

Operation icon:

Available

- Pop-up menu of the folder tree.
- Main edit menu.
- Toolbar.
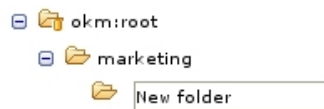
Find folder

Operation icon:
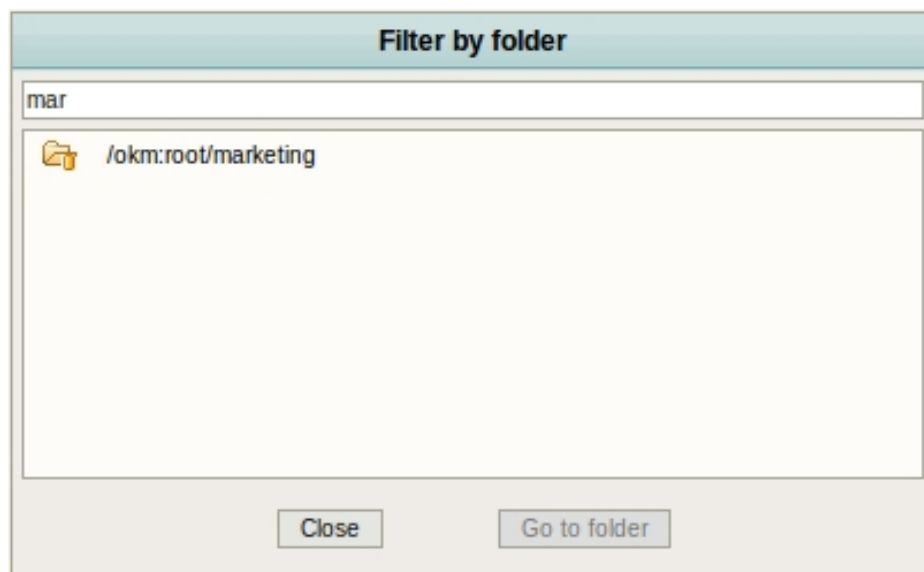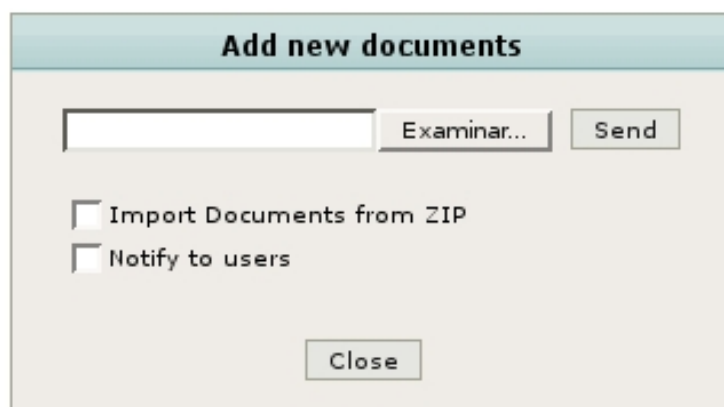
Available

- Toolbar.

Inserting documents
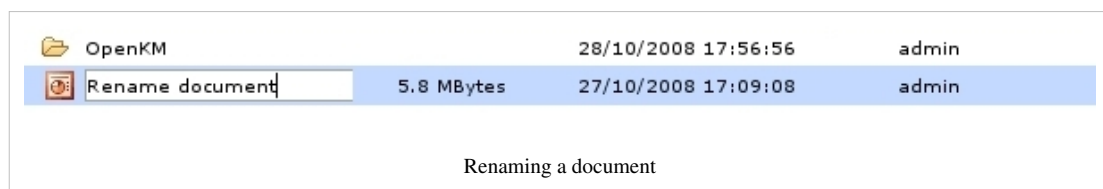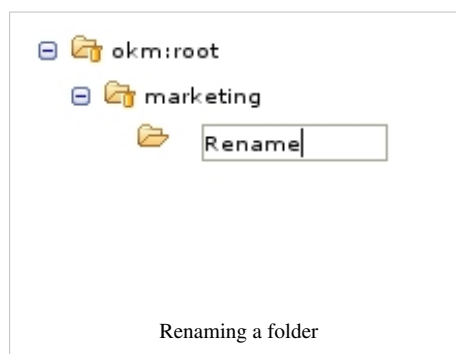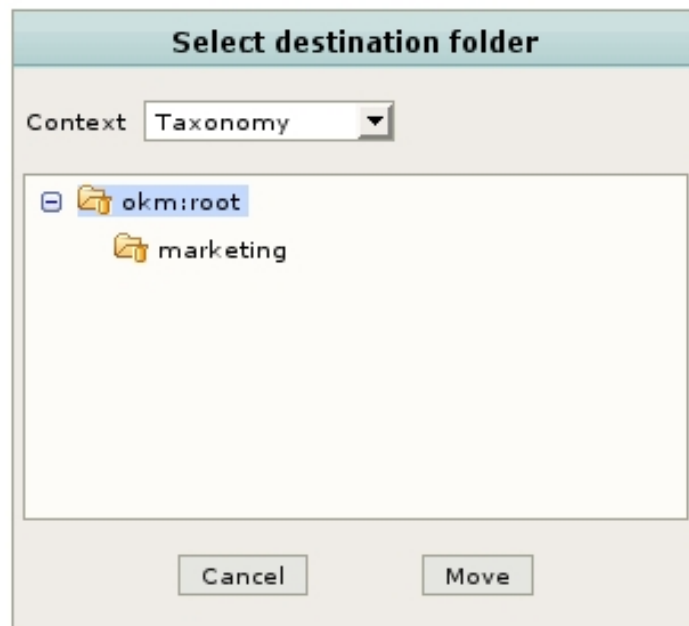
Operation icon:

Available

- Pop-up menu of folder tree.
- Pop-up menu of document browser.
- Main edit menu.
- Toolbar.
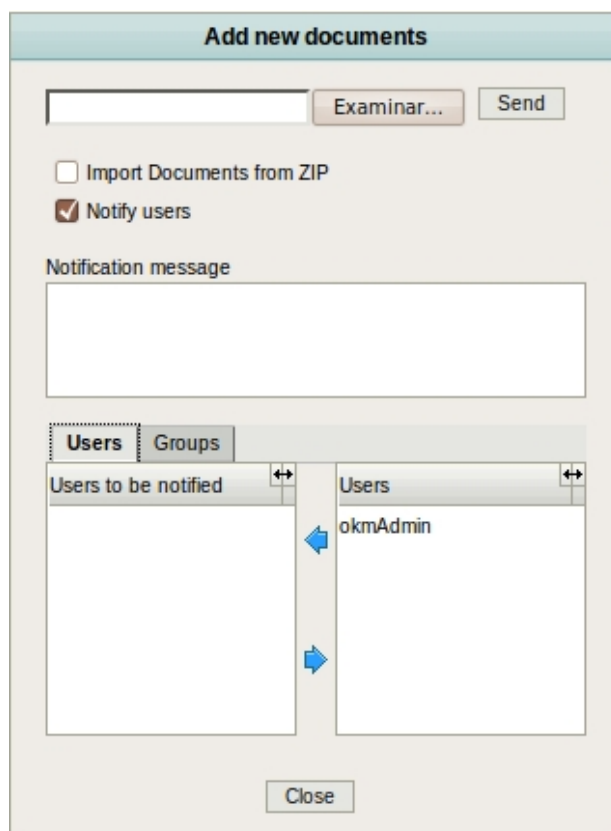
The option "Import documents from ZIP" allows you to import the contents of a zip file respecting the hierarchy of the folder tree. When the insert window appears on the screen, select the local folder clicking the button "Browse...". If you want to notify users that you have uploaded a new file by email, mark the checkbox "Notify users". Otherwise leave this option disabled. You can notify to users or groups.

To end, click "Send". Once the upload of the new document has finalised you can upload more documents with the option "Add another file".
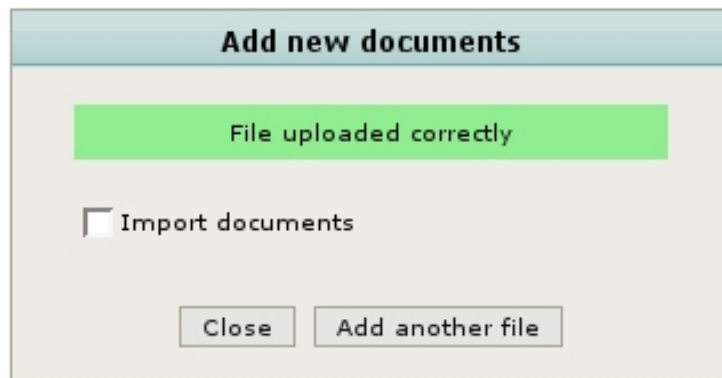
For large organizations can be enabled advanced filtering using Profiles administration feature. It allows to filter users and groups.
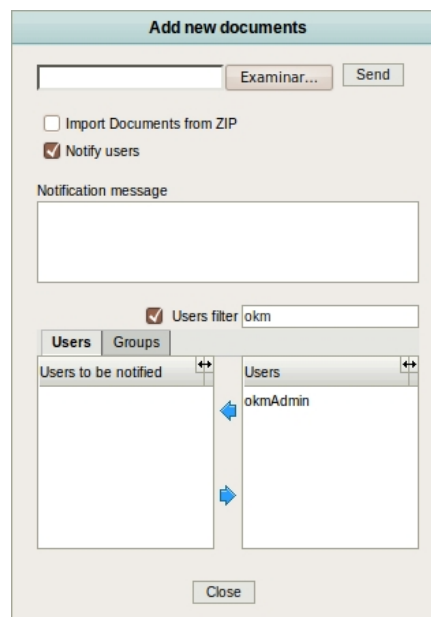
Up to version 4 and above

Has not present advanced filters and sending to groups

Wizard

You can configure in user Profile to allows wizard while uploading a new document. Property groups (metadata), keywords, and categories can be selected as a part of the wizard.

Property groups (metadata)

Document wizard

Technology
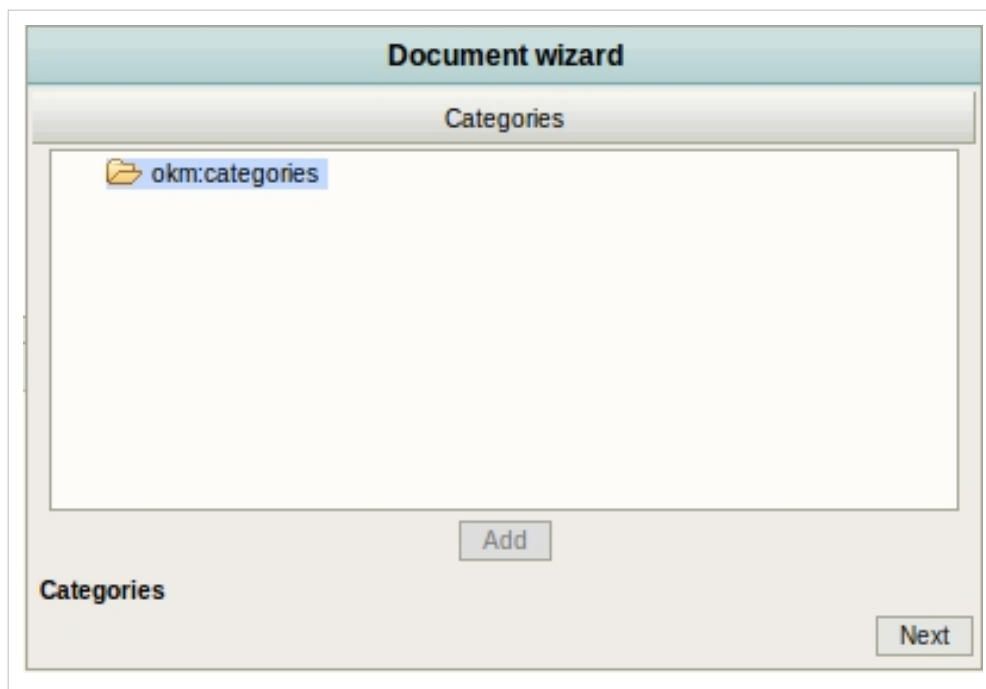
Type	t1 ▾	Add
Language	Java ▾	
Comment		
Description		
link		

Next
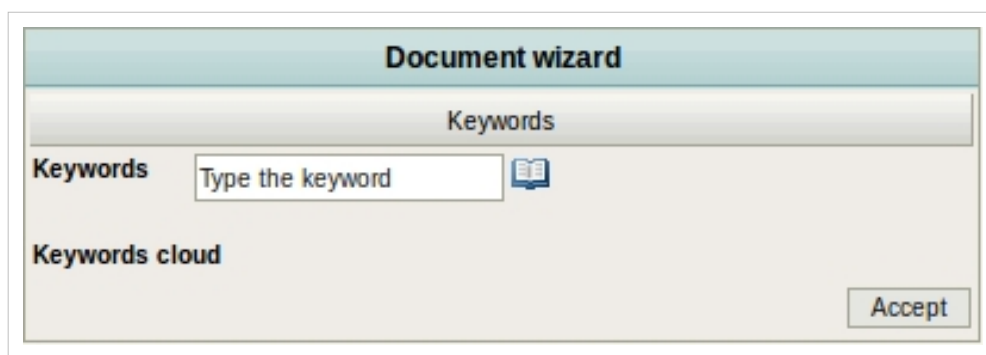
Categories

Document wizard

Categories

📂 okm:categories

Add

Categories

Next

Keywords

Document wizard

Keywords

Keywords | Type the keyword | 📖

Keywords cloud

Accept
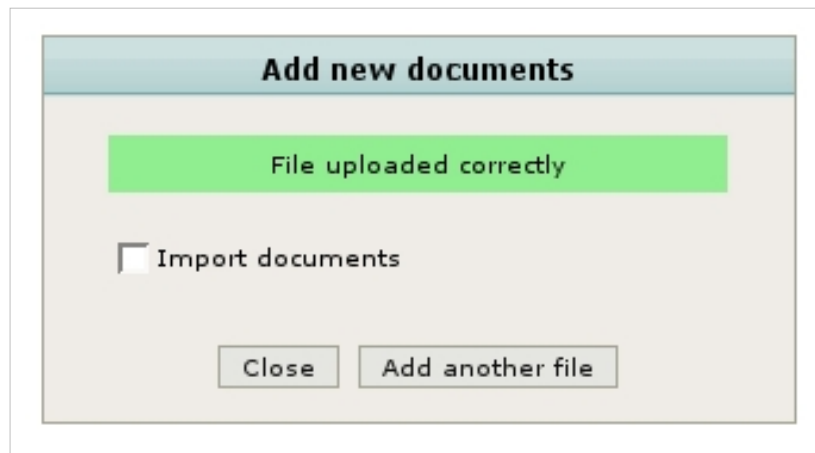
Renaming

Operation icon: ▣

Available

• Pop-up menu of folder tree.
• Pop-up menu of document browser.
• Main edit menu.

You can cancel the renaming option using the ESC key.

Renaming a folder

Renaming a document

Move

Operation icon: 📄

Available

- Pop-up menu of folder tree.
- Pop-up menu of document browser.
- Main edit menu.

A dialogue box appears to select the new location of the document or folder: click **Move**. If you do not have permission in the new location the **Move** button will appear disabled.

Copy

Operation icon:

Available

- Pop-up menu of the folder tree.
- Pop-up menu of the document browser.
- Main edit menu.

A dialogue box appears to select the location to copy of the document or folder to appears: click **Copy**. If you do not have permission in the new location the **Copy** button will appear disabled.
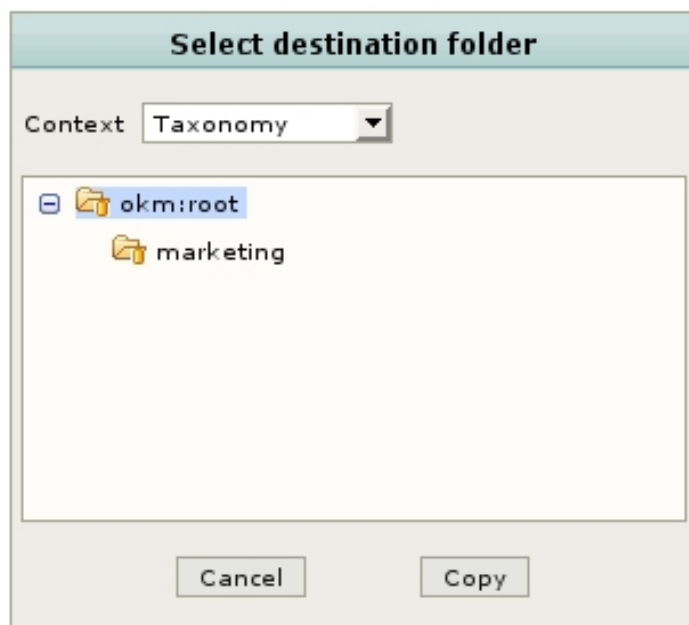
Adding bookmark
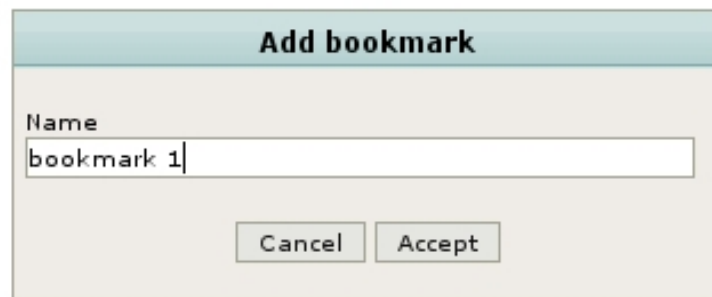
Operation icon: 🐜

Available

- Pop-up menu of folder tree.
- Pop-up menu of document browser.

Select the document or folder on which you want to do the operation. Execute the operation and a window will appear in which you can put a description of the bookmark.

Once the bookmark has been created you can check that it appears in the general "Bookmark" menu. The bookmarks are graphically distinguished depending on whether they are folders or documents, and ordered according to their category and name.

Set home

Operation icon: 🏠

Available

- Pop-up menu of folder tree.
- Pop-up menu of document browser.

You can set any folder or document as default home in the user environment.

In this way, on accessing the application the path to the folder or document that has been set as home will open automatically.

The operation to set a document or folder as home will always ask you for confirmation.
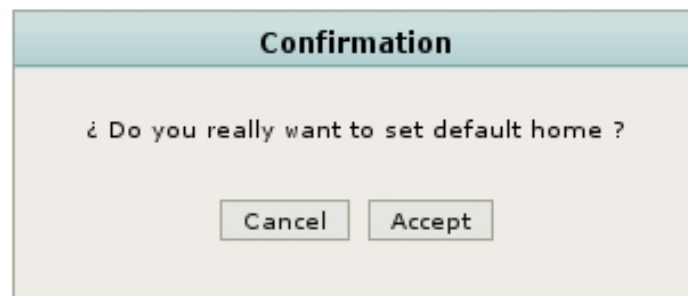
Deleting

Operation icon: ⛔

Available

- Pop-up menu of folder tree.
- Pop-up menu of document browser.
- Edit menu.
- Toolbar.

Simply choose the folder and select the option "Delete". The application will always ask you for confirmation of this option. When the document or folder has been deleted you can recuperate it from Trash.
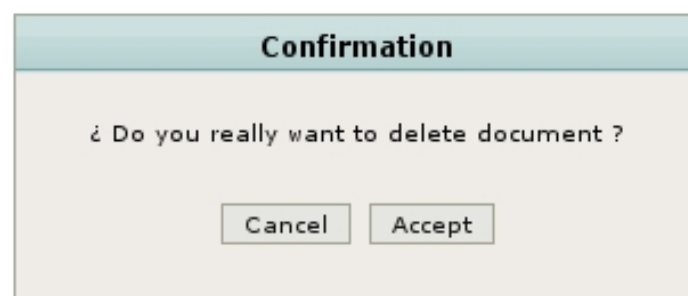
Keyword shortcuts

There's some keyword shortcuts that you can use with OpenKM.

On folders, documents and mails

F2	to rename
SUPR	to delete
CTRL+C	to copy
CTRL+X	to cut
CTRL+V	to paste

Others

F1	to show help
F5	to refreshing environment
INSERT	to show popup inserting document
CTRL+ALT+Q	to exit OpenKM
CTRL+D	to download a document or mail
CTRL+Z	to enable debug console
CTRL+N	to create new folder
CTRL+B	to show bookmarks

Version 5.0.3 and older

CTRL+Q	to exit OpenKM

Uploading from desktop computer

Operation icon: ![icon]

Available

- Toolbar.

At the center of the screen will appear the OpenKM logo. Simply drag and drop files or folders from your desktop computer to the logo and the files or folder it'll be automatically uploaded to OpenKM in your actual selected folder path.

To close it, simply doing right mouse click in the OpenKM logo, it'll appearing a menu and select exit.

Application splitters resize

Operation icon: ![icon]

Available

- Toolbar.

Application resize allows maximize fastly any Desktop UI Panel or turn back to default UI panels size.
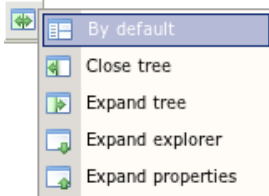
Document edit

Operation icon:

Available

- Pop-up menu of document browser.
- Edit menu.
- Toolbar.

To start to work with a file you must do a "Check-out" of it: that is, download the file to the local computer to be able to modify it. Once you have made the pertinent modifications, upload it once again with a "Check-in".

The automatic locking of the folder ensures that no other system user can modify its contents while you are modifying it.

Cancel edit

Operation icon:

Available

- Pop-up menu of document browser.
- Edit menu.
- Toolbar.

If you want to cancel the document edit, the "Cancel Check-out" option exists whereby the file undergoes no type of modification and it will be unlocked so that other users (depending on their privileges) can edit it.

Administrator force cancel edit

From OpenKM version 5.X it's available cancel document edition for any user with administrator grants, althought it'll not be the user who edited the document. In this case it'll be showed a confirmation popup to cancelling document edition.
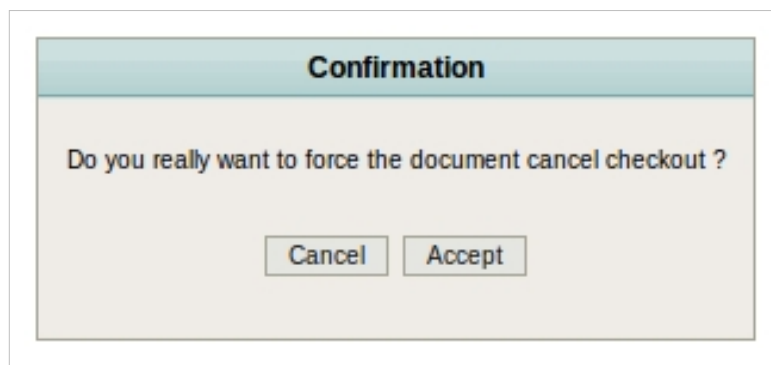
Update a file
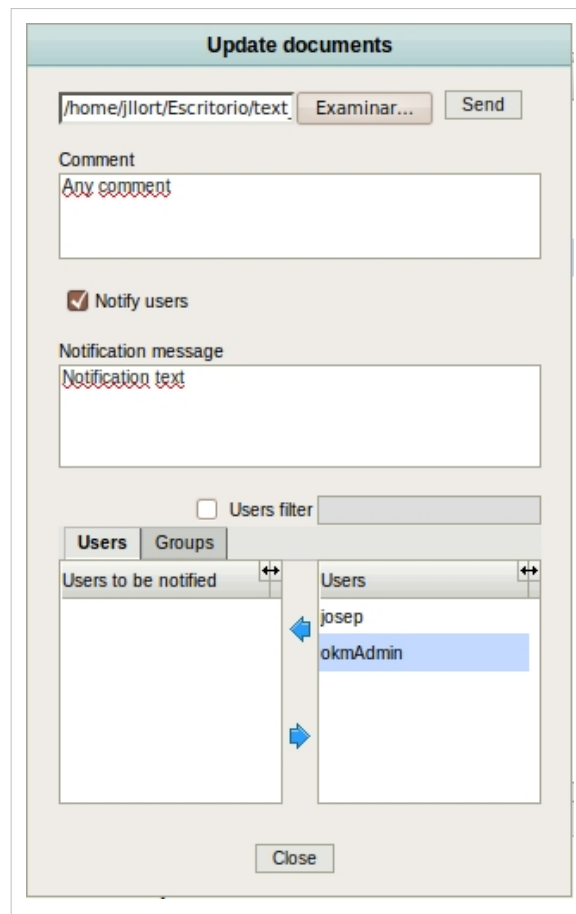
Operation icon:

Available

- Pop-up menu of document browser.
- Edit menu.
- Toolbar.

Once the changes have been made on the local computer, you must do a "Check-in" to upload the file once more to the system and unlock it for future use.

The system will ask for the modified file to upload it to the repository and notify you that it will replace the previous version with this newer one.

The comment field is to leave information concerning the update of the file - for example, what changes have been made.

You can send notification messages to user or groups. Aditionally can be enabled advanced filters, usefull for high level of users that can be enabled in using adminitration [Profile].

Up to version 4.x and earlier

Can only send mail notifications to users, and has not advanced filtering options.

Lock

Operation icon:

Available

- Pop-up menu of document browser.
- Edit menu.
- Toolbar.

If you want to protect the file so that no other user can make changes to it, you can use the Lock function. This means that until it is unlocked, no other user can modify it. When locked, a locked icon will appear to the side of the name of the selected file.

		Name	Size	Update date	Author	Version
		OpenKM		28/10/2008 17:56:56	admin	
		Ibacar	5.8 MBytes	27/10/2008 17:09:08	admin	1.1

Unlock

Operation icon:

Available

- Pop-up menu of document browser.
- Edit menu.
- Toolbar.

The unlock option allows you to unlock a previously locked document. This operation can only be carried out by the user who previously locked the document.

Administrator force unlock

From OpenKM version 5.X it's available force unlock document for any user with administrator grants, althought it'll not be the user who locked the document. In this case it'll be showed a confirmation popup to unlocking document.

Confirmation

Do you really want to force the document unlock ?

Cancel   Accept
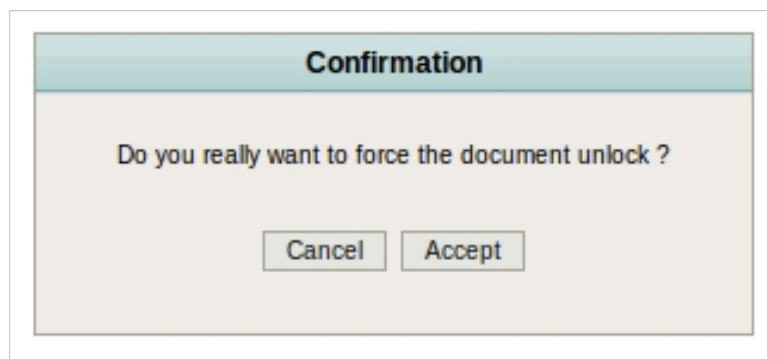
Downloading a document

Operation icon:

Available

- Pop-up menu of document browser.
- Edit menu.
- Toolbar.

If you want to save a file on the local computer without making any changes you can use the option "Download". Remember that if you modify the downloaded file you cannot upload it again to the system without having first done a "Check-out /Check-in" of the file.

Adding a metadata to a document

Operation icon:

Available

- Toolbar
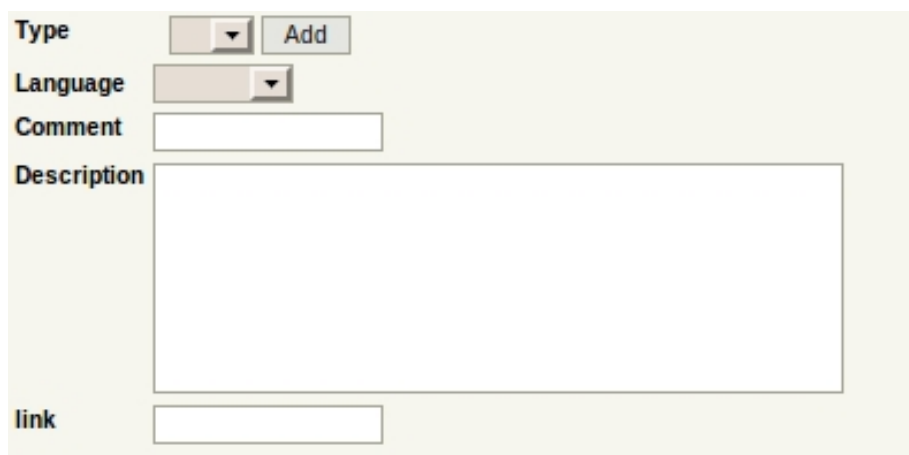
Property groups are groups of configurable parameters that can be configured each time the application is installed which allow for the categorization of documents. These property groups can be Input, Simple List, Multiple Select List, Text area, Date, Link or OpenKM folder path. The values of these properties are internationalised (various languages).

To add a property group (these must first be registered by the administrator) simply select a document and select the corresponding property group.

Once a property group has been added, a new tab will appear with the name of the corresponding group and the fields with the properties of it.

Once a property group has been assigned to a document, you can modify its values by selecting the option "Modify".

Parametrization is extremely useful. Combined with the Search motor it enables the localisation of information by categories, it being possible to create metadata categories which are adapted to a user group's working method.

> Adding or deleting a property group will not affect the document history.
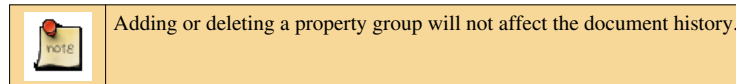
Deleting a metadata from a document

Operation icon

Available

- Toolbar.

This option enables you to delete a property group which at that moment is enabled in the properties panel.

Adding keywords

In the document properties tab of the properties panel, you can add and modify keywords.

In order to optimise indexing and future information searches in the document management system, it is necessary to enter keywords that describe or identify the stored file.

Although the document parametrization system by property groups is superior with regards to capacity, these will continue to be maintained and will not disappear, as it is understood that in certain installations property groups will not be created and it is useful that parametrization by default keywords is maintained.

Adding or deleting keywords does not modify the document version.

Adding keywords from thesaurus

Keyword can be selected from thesaurus dictionary. Click in 📖 thesaurus icon and it'll appearing a popup with available thesaurus keyword.
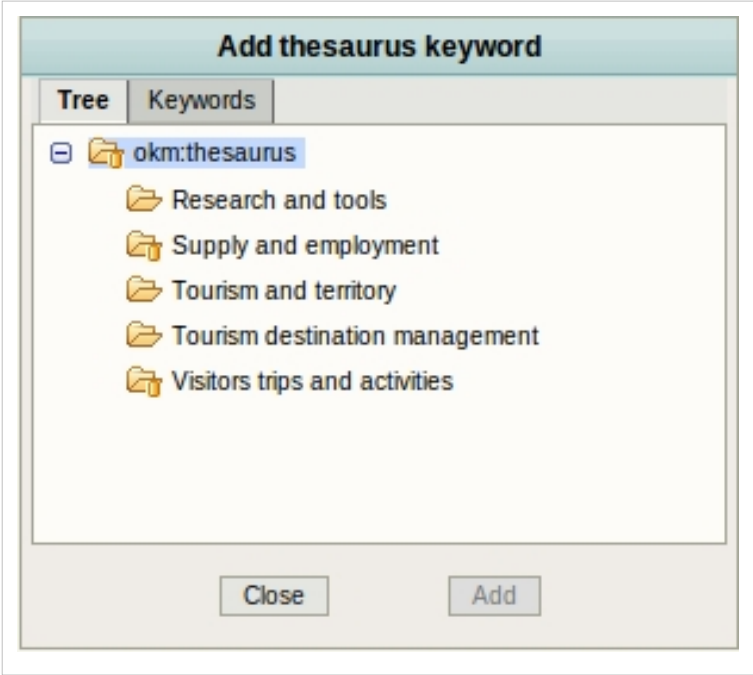
Adding categories

In the document properties tab of the properties panel, you can add and remove categories.

In order to optimise indexing and future information searches in the document management system, it is necessary to add categories that describe or identify the stored file.

Although the document parametrization system by property groups is superior with regards to capacity, these will continue to be maintained and will not disappear, as it is understood that in certain installations property groups will not be created and it is useful that parametrization by default categories is maintained.

Adding or deleting categories does not modify the document version.

Categories are a hierachical folder structure of folder and subfolders.
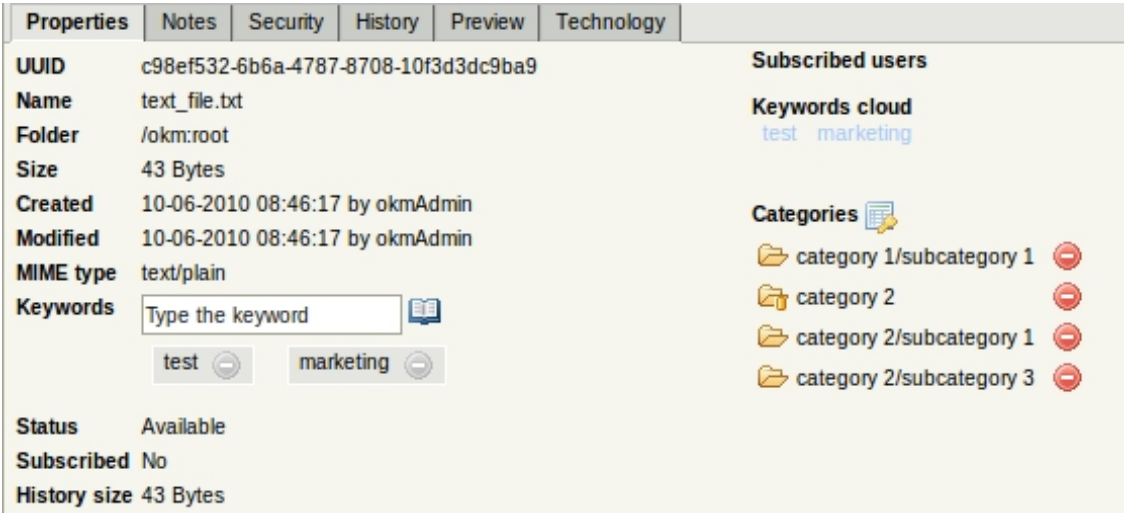
Adding categories

Categories can be selected from available hierachical categories folder structure.

Click in categories icon and it'll appearing a popup with available cattegories.
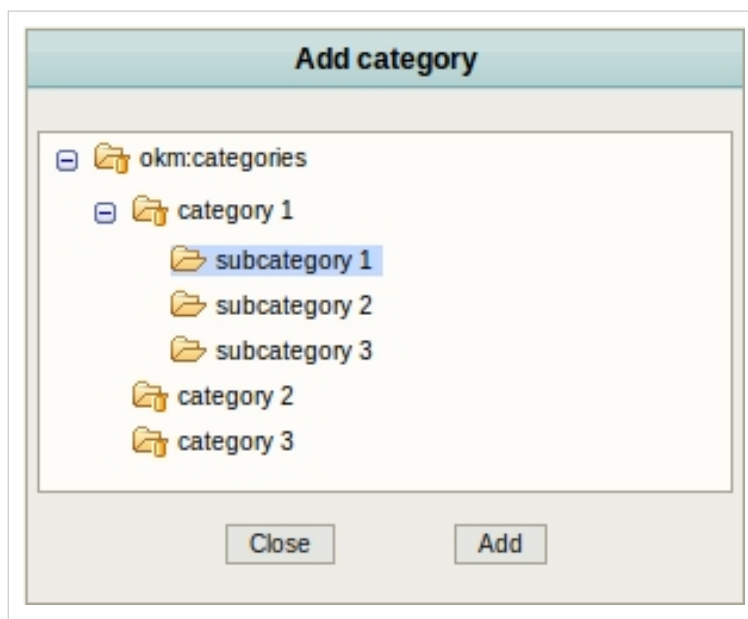
Deleting categories

Click in delete icon and related category it'll be deleted from document.

Copy to clipboard

Copy the document url (OpenKM browser path) to clipboard. Note in some browsers like Firefox you might configure browser to enable this option (security browser restrictions).

To enable JavaScript "Copy to clipboard" buttons on Firefox and Mozilla, enter the following line into browser address bar: **about:config**.
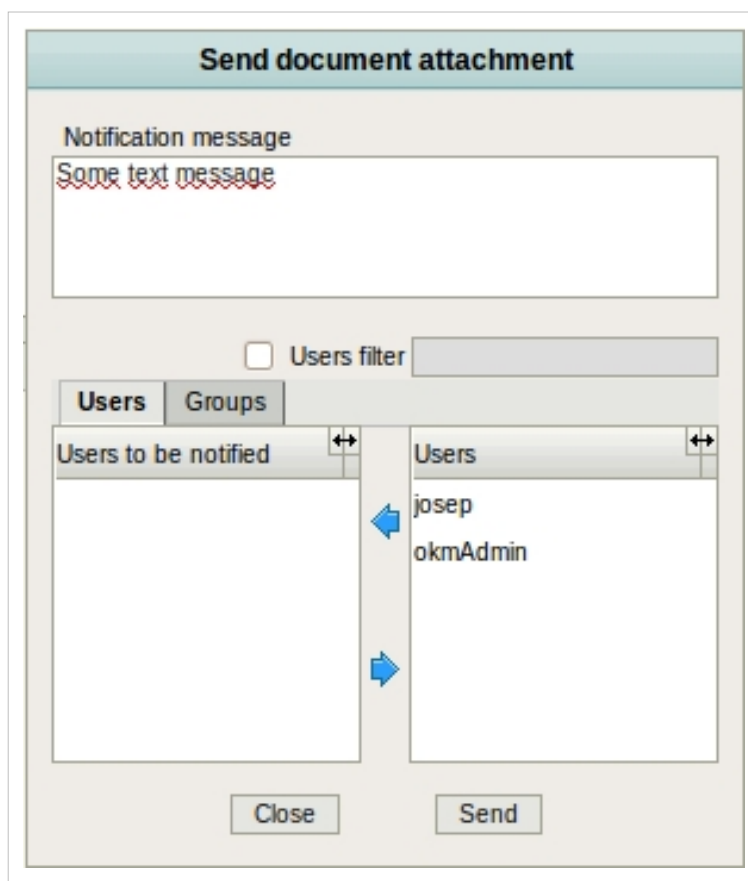
The list of preferences should open in browser window. Click right mouse button somewhere in active part of preference list window and choose New > Boolean option from context menu. Paste the following Preference name into the New boolean value window input box: **signed.applets.codebase_principal_support**.

> Since OpenKM 5.0 this feature is implemented using Flash and you don't need to change your browser configuration because *just works!*.

Send document as attachment

To send document as a mail attachment to some OpenKM user, must first select some document. Then open File menu and select option "send document attachment", it'll be shown a popup in what can be selected the user or groups to send the document as a mail attachment.

Categories

Categories is a hierarchical tree structure of categories and subcategories folders. The idea is that folder and subfolders represent conceptual tree concept structure.
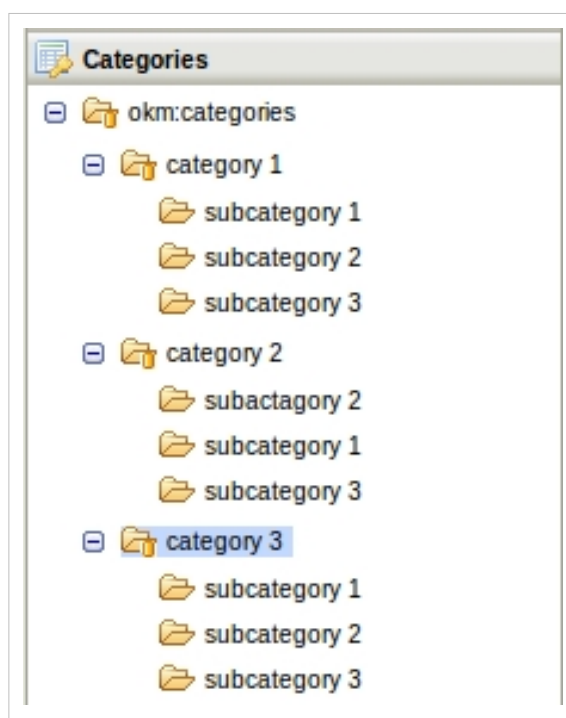
Any document can be linked with many categories folders at same time. Each time some category folder is selected, all related documents will be displayed in file browser panel. Major document functionalities are available from this view.

Thesaurus view

A **thesaurus** is a book that lists **words grouped together according to similarity of meaning** (containing synonyms and sometimes antonyms), in contrast to a dictionary, which contains definitions and pronunciations.

Thesaurus view is a hierarchical tree structure of SKOS (Simple knowledge organization system) folders. Really SKOS concepts are linked many to many, but it's represented as a tree hierarchical structure.
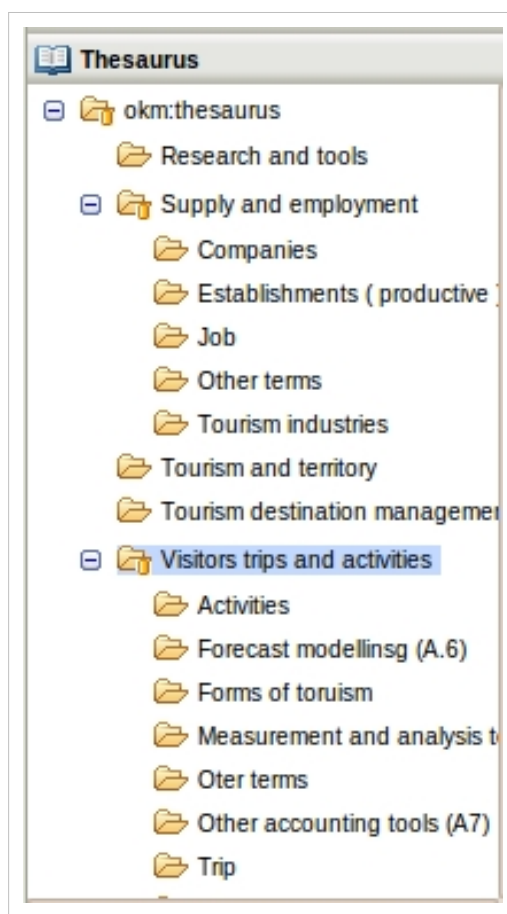
Any document can be linked with many skos folders at same time. Each time some skos folder is selected, all related documents will be displayed in file browser panel. Major document functionalities are available from this view.

My documents

My documents is a tree folder structure to organizate user personal documents. The documents are only available to the owner user.
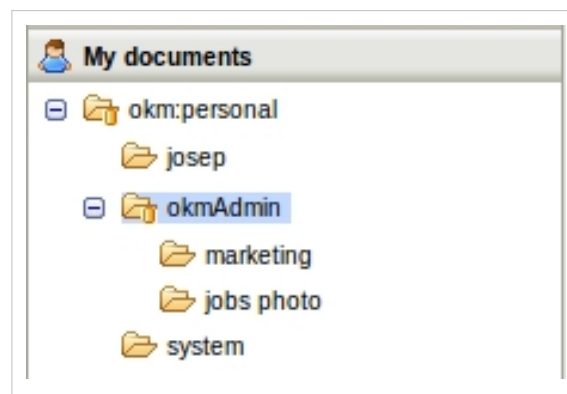
From version 5.x and upper any user with adminitration grants, can navigate across all users my documents folder structure.

Templates

Templates is a tree folder structure to organizate main source documents. The idea is that organization create new documents (for example fax, new project document templates, invoices, etc.) from documents into templates panel.
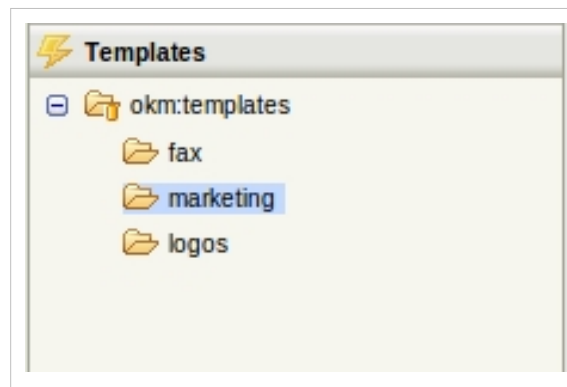
Create new document from template

First select some document, and execute de option "create from template". Then it'll appearing a popup that demand the destination folder.
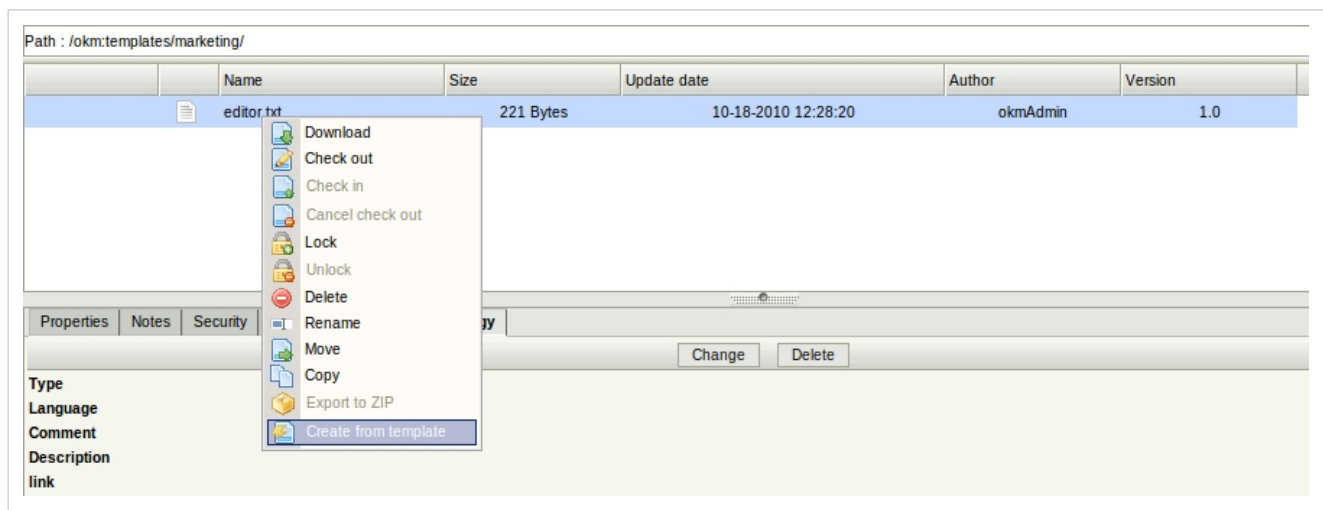
After it, optionally can rename the document.
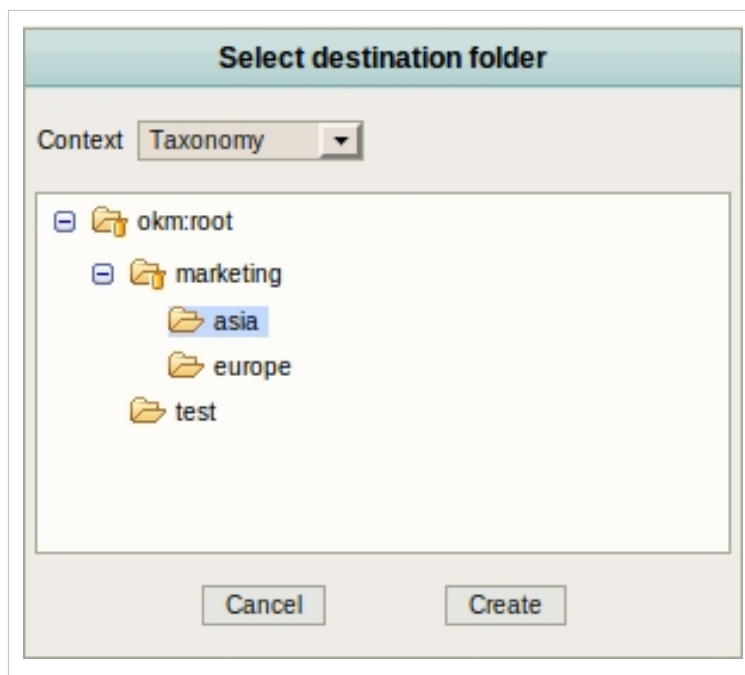
If the selected document is pdf and has some property group - metadata - associated then will appearing creation wizard popup. Property group fields will be requested in order to combine with generation of new PDF. You can create PDF forms with several applications:

- Acrobat Pro [1]
- How-to: Create PDF forms with OpenOffice [2]
- PDF Forms Designer [3]

The wizard

And finally generated the PDF with property group fields added by user.
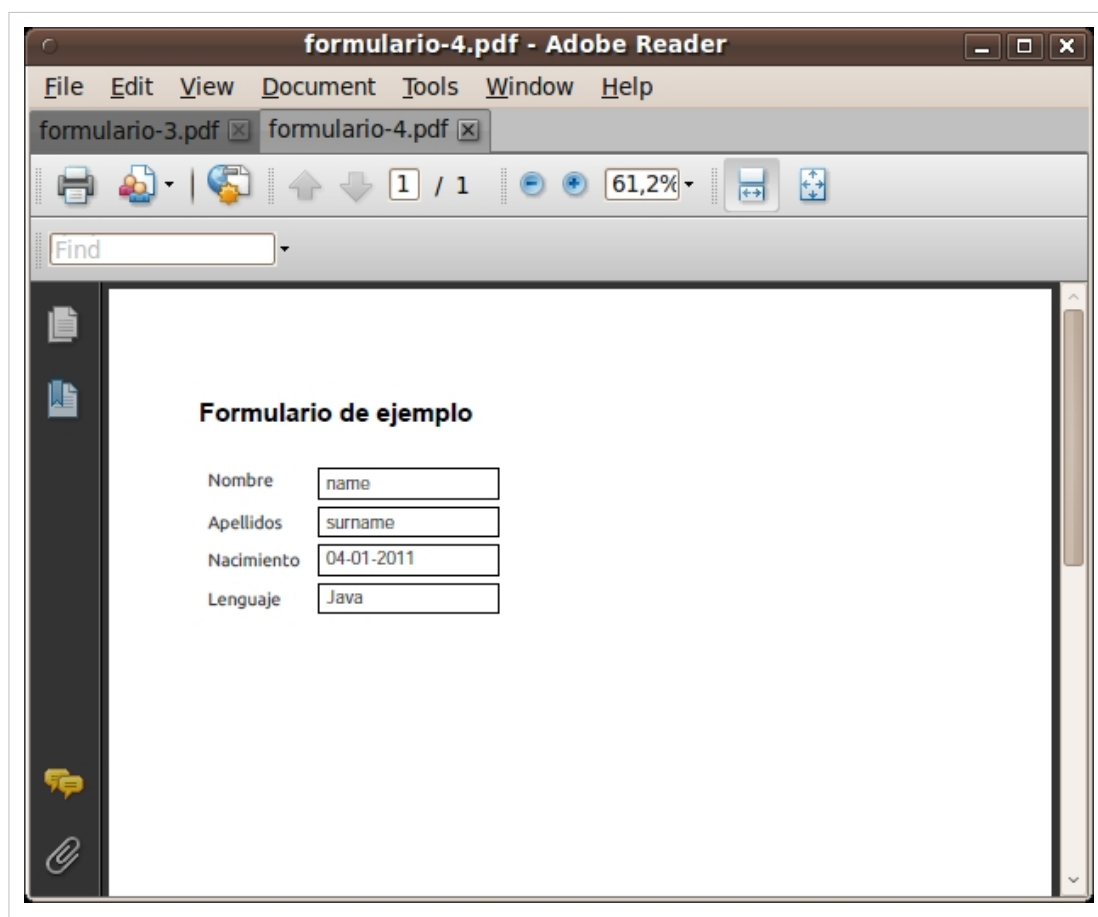
After it, optionally can rename the document.
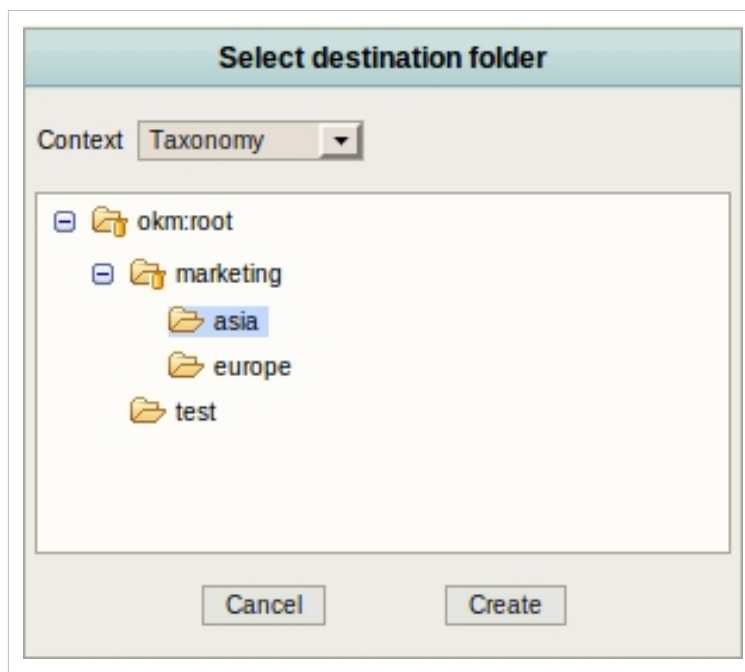
OpenKM 5 and above

First select a document, and execute option "create from template". Then will appear a popup that request for the destination folder.
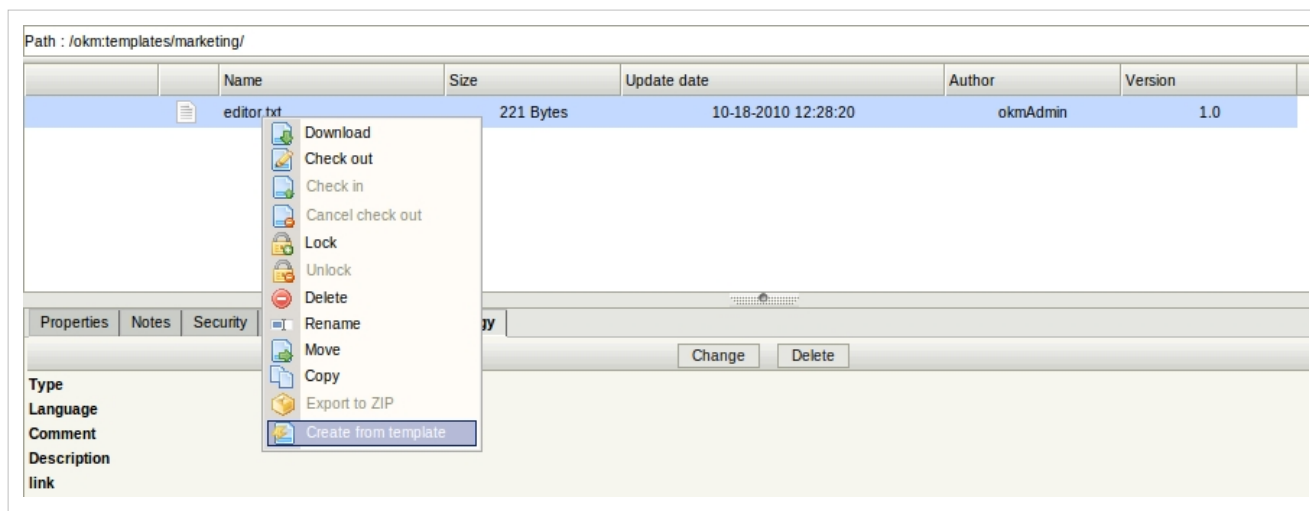
After it, optionally can rename the document.
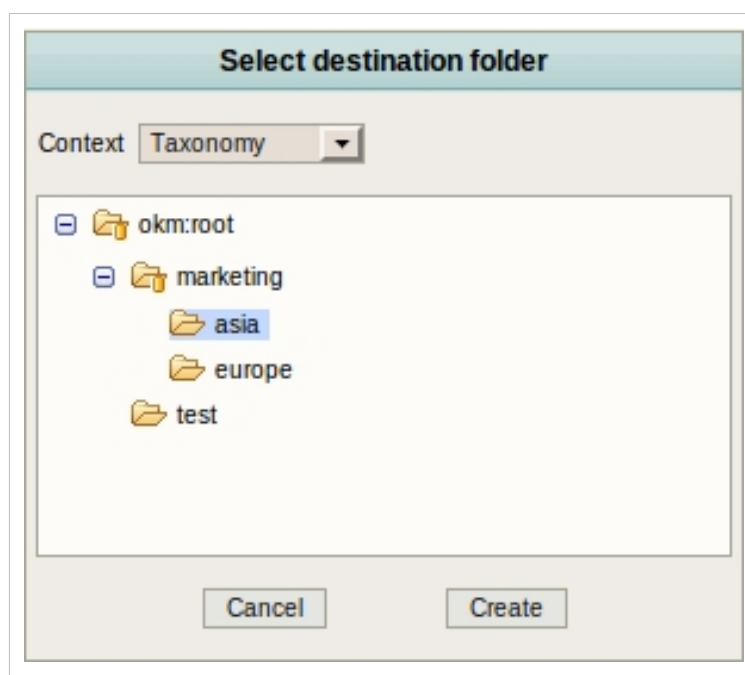
See also Creating templates.

References

[1] http://www.adobe.com/products/acrobat.html
[2] http://danilop.wordpress.com/2008/07/02/how-to-create-pdf-forms-with-openoffice/
[3] http://pdfformsdesigne.sourceforge.net/index.html

E-mail

Import users mails from some user mail account by IMAP. Importation is made automatically by OpenKM each 60 minutes, depending network bandwidth configuration, and other parameters, refreshing time could be greater that this.

Attached documents are indexed too.
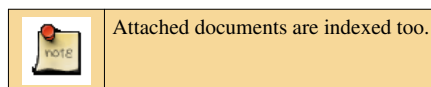
Importing mechanism creates a folder structure based on year, month and day to organize automatically imported mails.
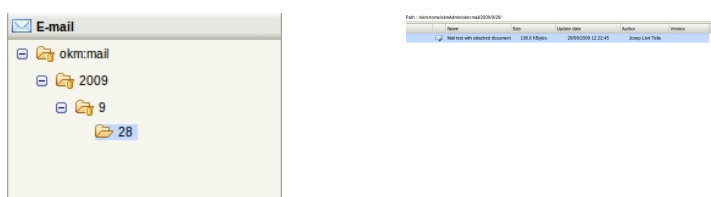
From version 5.x users with adminitrator grants have access to all users mails.
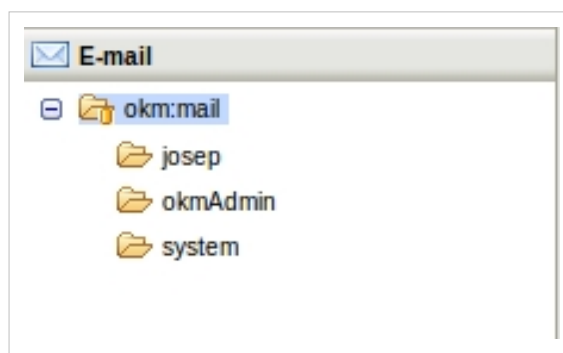
Copy attached document

Using contextual menu on document and selecting the "Copy" option will appear a menu to select destination folder to copy attached document.

Download attached document

Using contextual menu on document and selecting the "Download" option will downloading the attached document.

Trash

The deleted files and folders are stored in Trash in order to be able to recuperate them if their elimination was accidental. Trash, as well as the files located in it, are personal to each system user.

- Restoring a folder or document
- Definitively deleting a folder or document
- Emptying trash
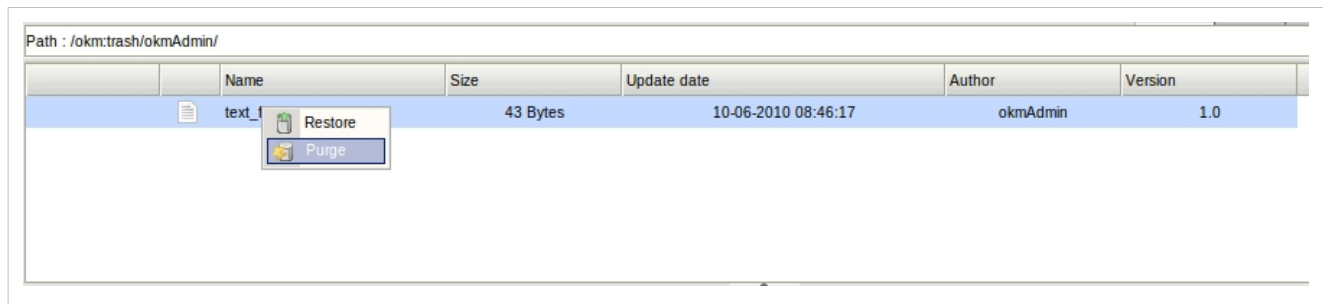
From version 5.x users with adminitrator grants have access to all users trash.
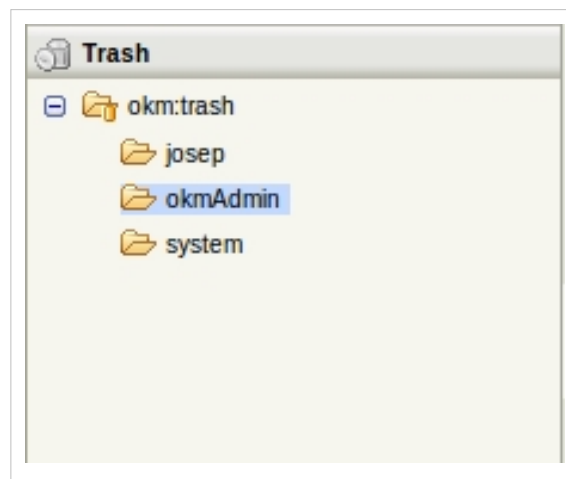
Using information

In the properties panel there is detailed information on the documents and folders to which the user has access.

- Folder information tabs
- Document information

Security

The security option allows you to show and define what users and groups have permission to a specific document or folder.

- Modifying security

Search

The Search tab, located in the upper right of the screen, changes the desktop panels for those of Search.

Searches may be made by words in the contents of the files, by the name (title) of the documents, or by the type of file (MIME type). Similarly, providing a keyword has been entered into the files, you can search using this field. You can also make searches by property group values if they have been defined.

The results are displayed paginated with 10, 20 or 30 results.

Stars indicate the relevance of the document found. This value is established by the Search engine according to the search field and the results found. The list of documents found is ordered from greatest to least relevance.

- Making a search
- Executing a stored query
- Deleting a stored query
- Opening the location of a document
- Opening the location of a folder
- Save as a user news
- Searching with OpenKM

Dashboard

The Dashboard tab, located in the upper right of the screen, changes the desktop panels for those of Dashboard.

Dashboard has several information services and utilities for user like user user, general and mail documents specific document queries views, the push search service (news), workflow task, and the keyword map (tag cloud view).
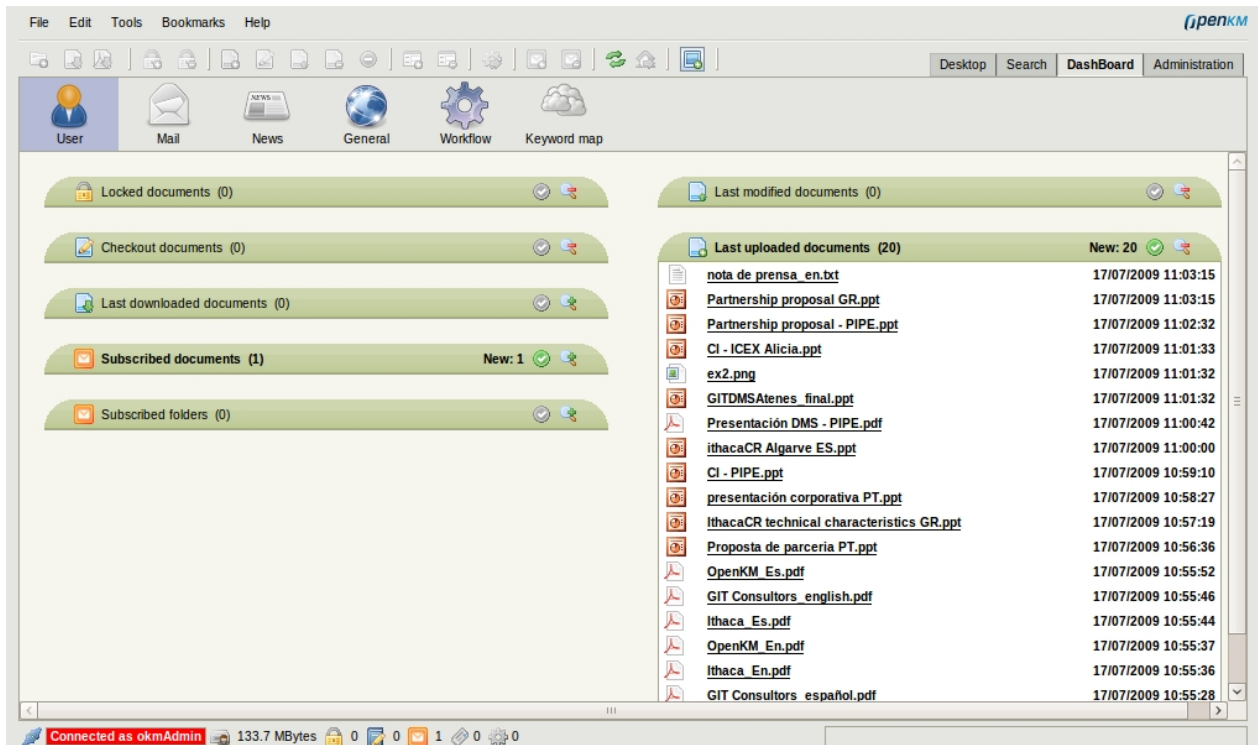
To change between these user utilities there's a button menu on the top, the selected option is always marked in blue.

- User view
- General view
- Dashboard keyboard map
- Dashboard mail
- Dashboard news

Notification service

The application permits notification by email of the insertion and update of a new document via an email message.

The user to whom the application has sent a notification by email will see a message with a direct link (URL) to the document, the user who has made the notification and a message (description) if the user has supplied one. The "subject" of the email received by the user will be something similar to the following:

```
OpenKM – NOTIFICATION – "Document Name"
```

The user can create a filter with the name "OpenKM" or "OpenKM - NOTIFICATION" to centralise in one single folder all notifications made by the application in the user's mail client.

Subscription service

The application allows you to subscribe to a folder or document with the purpose of making an audit of the changes on one document in particular, or the documents contained in said folder.

The subscription notifies you of the following operations made by users on the documents. These are some of the event which generates a notification:

* Cancelling a document edit
* Uploading the modifications of a document
* Copying a document
* Creating a document
* Setting the properties of a document
* Unlocking a document

* Making a subscription
* Deleting a subscription

Starting a Workflow

After selecting some document, make a click on ⚙ start workflow icon, then it'll appearing a popup with available workflows installed in OpenKM.
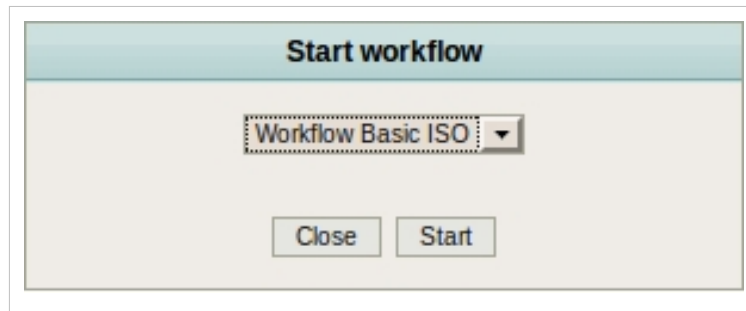
After pressing start button, workflow will automatically starting (some times workflow demands some extra parameters information before starting) assigning the first pending task to some user or group.

Workflow pending task

In Desktop, when some user has pending workflow task, at bottom it'll be a ⚙ blinking icon that indicates user has pending task. Making a click on ⚙ pending task icon, it'll be opened the dashboard workflow view.
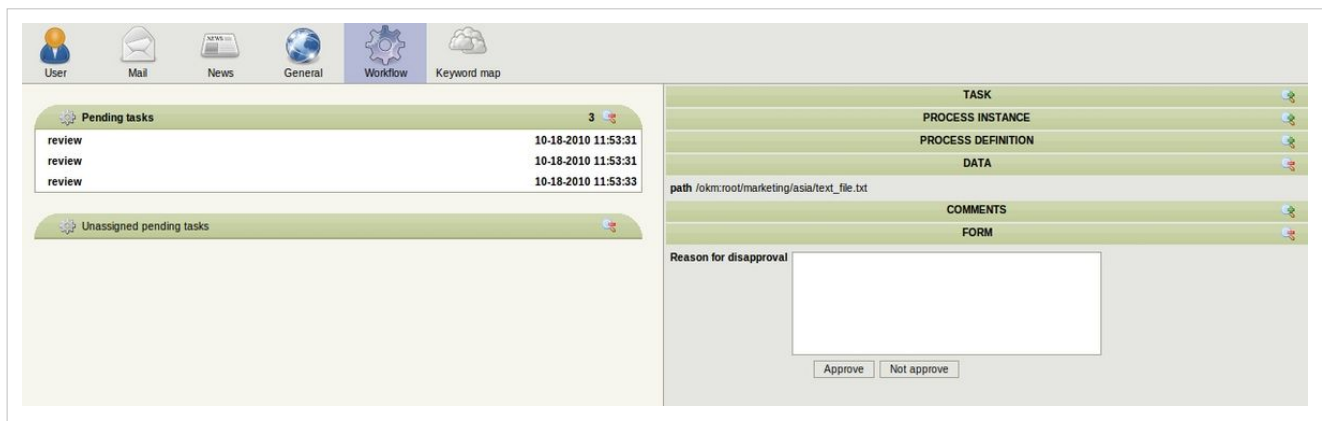
User have some associated pending tasks.

Selecting any pending task, workflow will demand to user some infomartion about the pending task associated to the user. After user will put these information, workflow will continue with next task.

TASK	
PROCESS INSTANCE	
PROCESS DEFINITION	
DATA	

path /okm:root/marketing/asia/text_file.txt

| COMMENTS | |
| FORM | |

Reason for disapproval

[Approve] [Not approve]

User configuration

User can change their own password, mail address and optionally configuring his imap mail account (it'll be automatically read periodically by OpenKM)

To show user configuration open menu tools, submenu preferences and then select option "user configuration"

User configuration

User account

User	okmAdmin
Password		
E-mail	admin@noreply.com
Roles	AdminRole

Mail account

IMAP server

IMAP user name

IMAP user password

IMAP folder

[Test]

[Update] [Cancel]

Languages

OpenKM is a multi-language system which permits you to change the language in the user interface at any time during the session. In the "Tools / Languages" menu, you can select any of the languages installed by the administrator.

Appearance

The graphics appearance of the system can be changed at the will of the user depending on the templates defined by the administrator. This option is available in the "Tools / Appearance" menu.
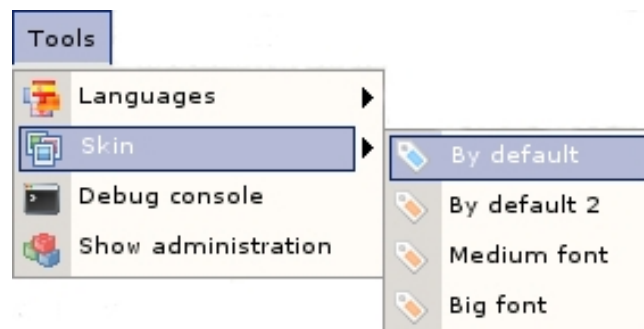
Using iPhone or Android

With OpenKM you can use your iPhone or Android terminal.

You must use the same url. OpenKM automatically detects if you're using iPhone or Android terminal. Note that not all OpenKM features are enabled in this view.

Navigation

Making a search

To downloading a document simply click in the document.

To view properties make a click in right arrow.

Document properties

Folder properties

Help

This menu, as well as providing help on the functioning of OpenKM, allows you to send comments and error notifications (bugs) to the system developers.

There is, furthermore, the option of requesting Support via the web on the system operation or to access the OpenKM discussion forums. Other options are access to the project website (http://www.openkm.com) or the display of product credits.

In the version notes you can find the changes that have been made with respect to the previous version.
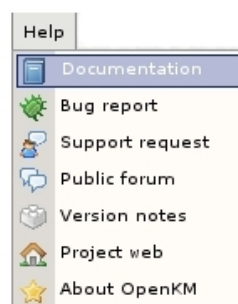
Microsoft Office Addin

Office Addins are compatible from version 2000 to version 2007

Oulook addin

Outlook_addin enables user to selecting several mails and importing content and attachment to OpenKM.

Importing mail creates a folder structure based received mail date (year/month/day folder structure) and imports into the mail content OpenKM mail tab view.

Word Addin

Word Addin enables user uploading new files and editing OpenKM files.

When user uploads new files, browses across tree OpenKM view to select where wants to uploading.

OpenKM word AddIn detects if document opened by user is an OpenKM and enables or disables some toolbar option.

Excel Addin

Excel Addin enables user uploading new files and editing OpenKM files.

When user uploads new files, browses across tree OpenKM view to select where wants to uploading.

OpenKM excel AddIn detects if document opened by user is an OpenKM and enables or disables some toolbar option.

PowerPoint Addin

PowerPoint Addin enables user uploading new files and editing OpenKM files.

When user uploads new files, browses across tree OpenKM view to select where wants to uploading.

OpenKM PowerPoint AddIn detects if document opened by user is an OpenKM and enables or disables some toolbar option.

> When user edits documents it's saved locally in %USER_LOCAL_DOCUMENT_FOLDER%/OpenKM.

> Editing OpenKM documents, user can decide uploading or cancel editing, after both operation local file is removed due to not generate user confusion. When user uploads a new file this is not removed from his computer.

Outlook addin

Office Addins are compatible from version 2000 to version 2007.

After installing Outlook adding it'll appears new menu option "OpenKM".
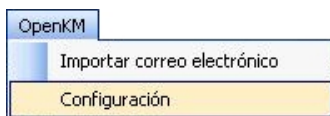
Configure OpenKM AddIn

First you must select **Configuration** option menu to setting your configurations values for remote OpenKM accessing from client computer.
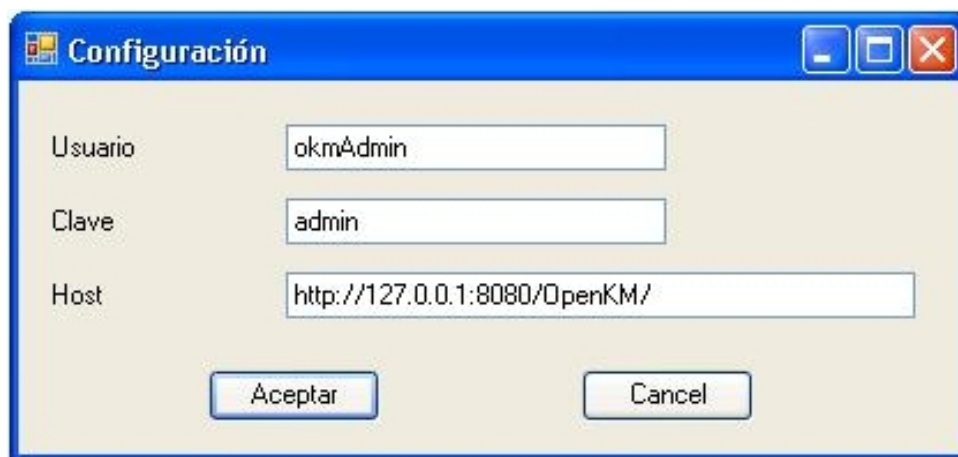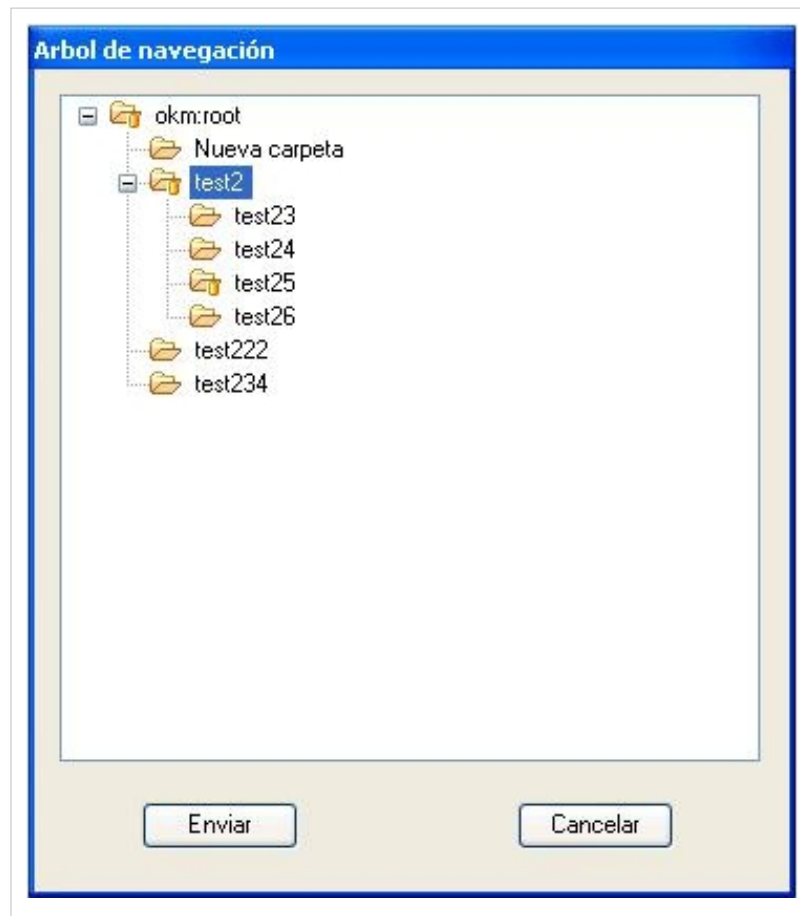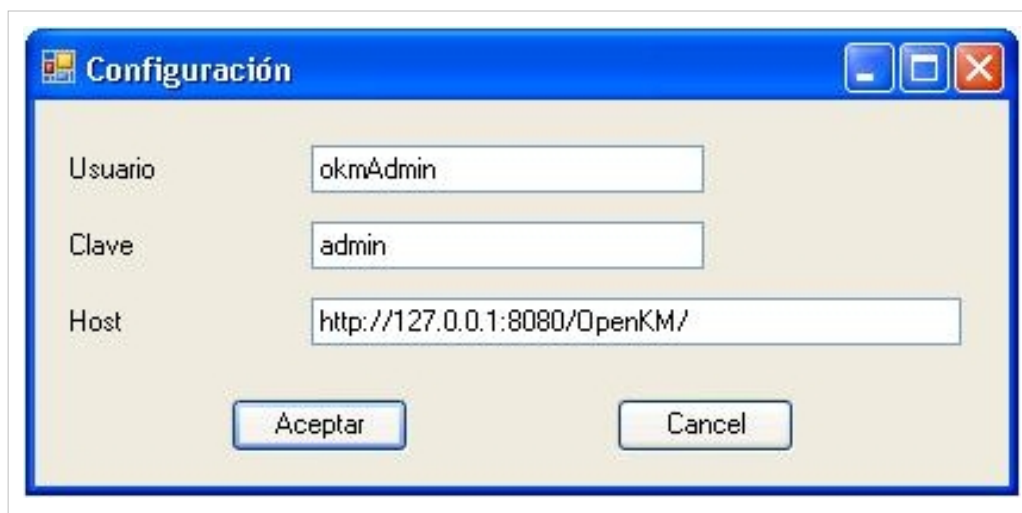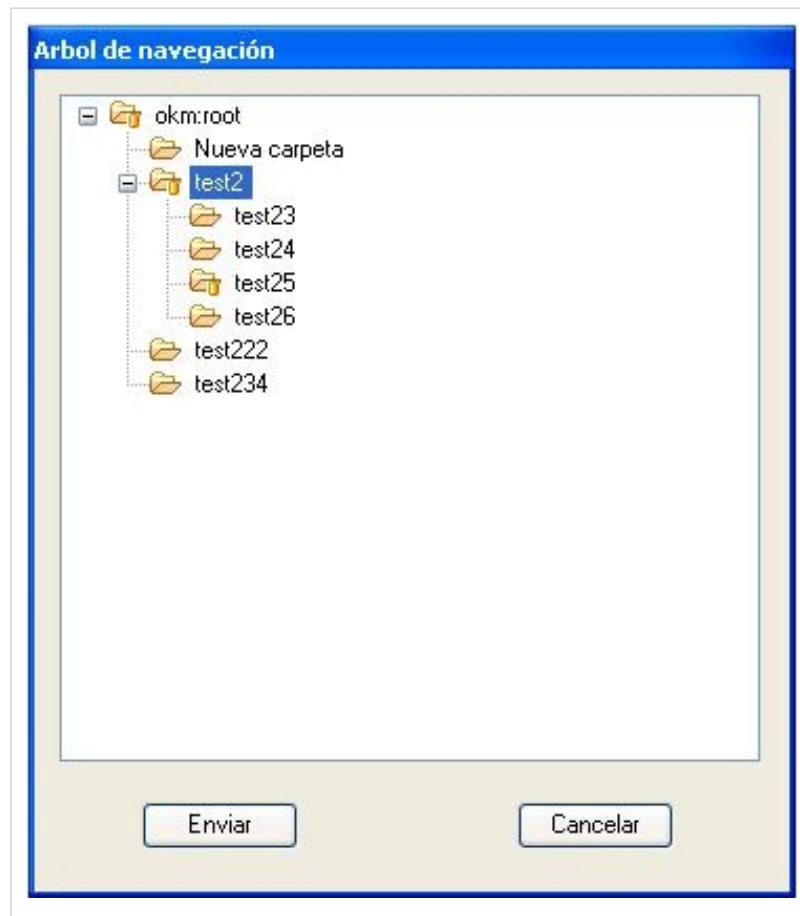

When you setting your configuration values is created **OpenKM folder** in your user **My documents folder**. Into OpenKM folder is created a configuration file called **openkm.xml** and other file called **document.xml** that OpenKM Addin uses to store some document editing information, you might not editing or deleting this file.
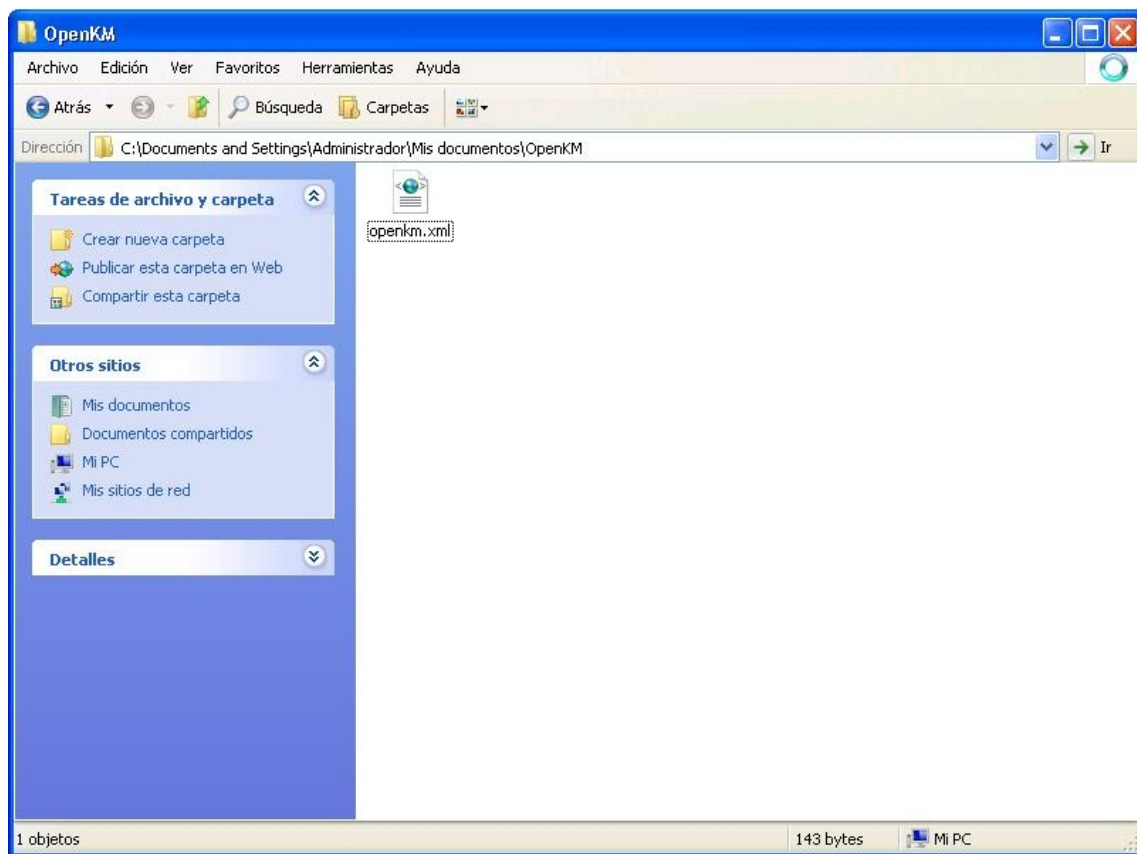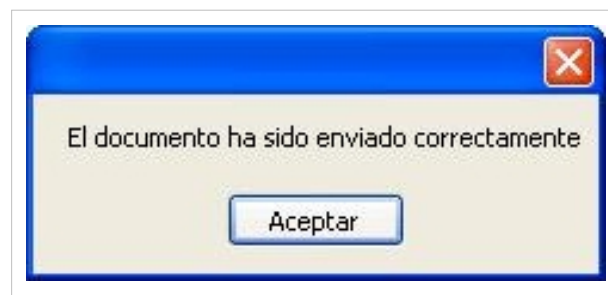
Importing mails to OpenKM

After configuration is made, use can import mails to OpenKM. To import mails, first select one or more mails and then select Import mail into OpenKM option menu. After importing it'll be done it'll appear a message indicating number of mails and attachments imported. Mails are imported in mail
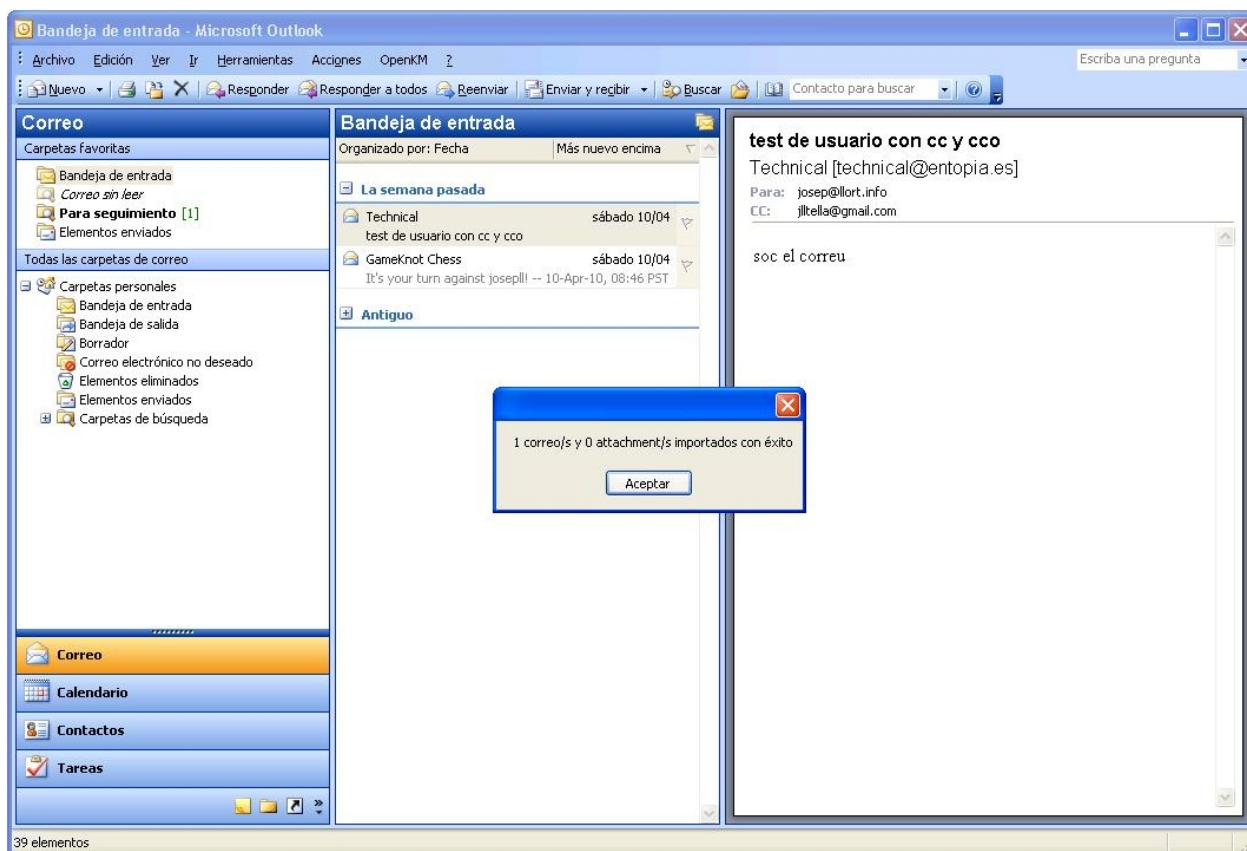
OpenKM Outlook addin runs with OpenKM 4.1 or upper.

Word Addin

Office Addins are compatible from version 2000 to version 2007.

After installing Word Adding it'll appears new "OpenKM" toolbar menu options.

Detail of the functions according to their icons:

- → Addin configuration
- → Add new document
- → Document edit (check-out)
- → Upload modified document (check-in)
- → Cancel document edit
- → Help

Configure OpenKM AddIn

First you must select OpenKM tool bar option to setting your configurations values for remote OpenKM accessing from client computer. If you've got other OpenKM AddIn yet installed it's not needed.

When you setting your configuration values is created **OpenKM folder** in your user **My documents folder**. Into OpenKM folder is created a configuration file called **openkm.xml** and other file called **document.xml** that OpenKM Addin uses to store some document editing information, you might not editing or deleting this file.

Uploading a new file

After making a click in adding new document button, it'll appears a tree browser view. You must select the folder where you want to uploading the file.
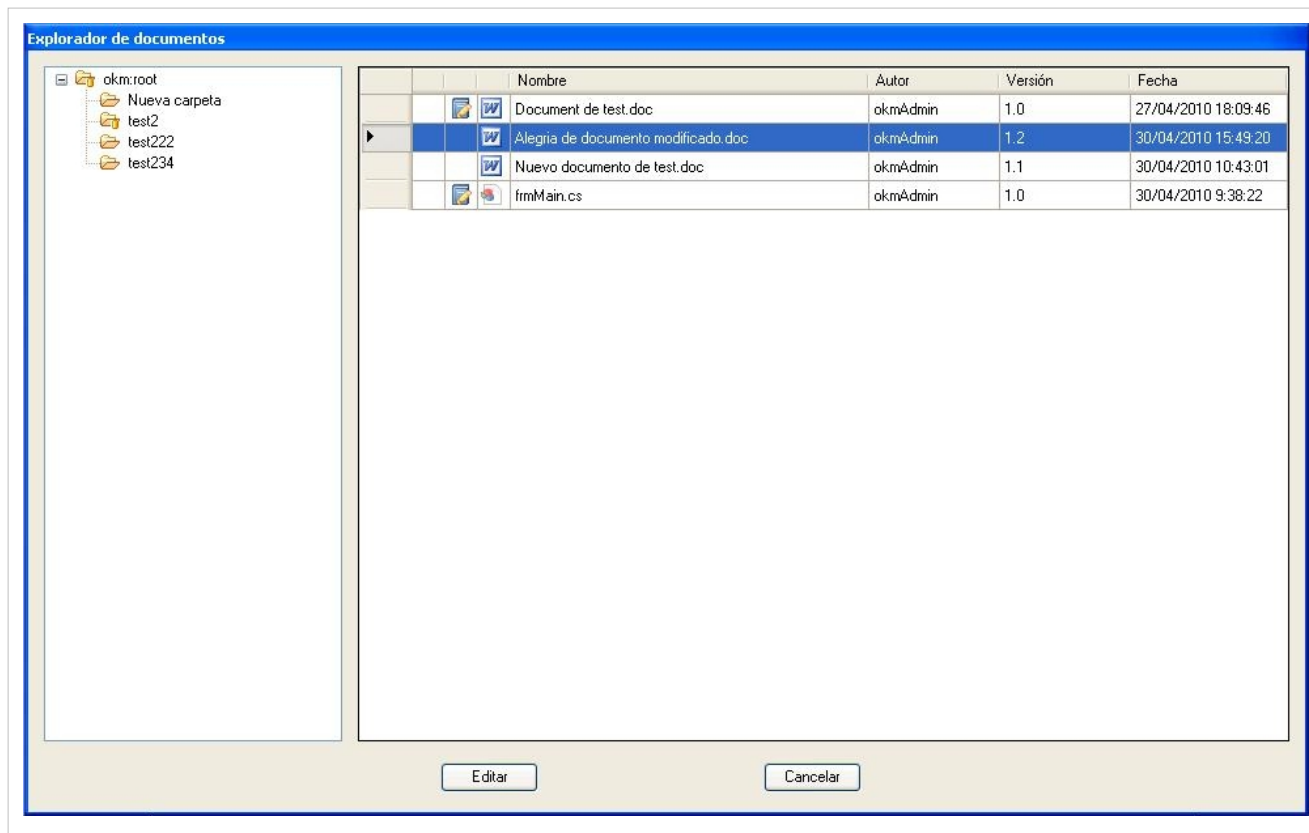

Click on **Send** Button, and after document it'll be uploaded to OpenKM it'll appears a notification message.
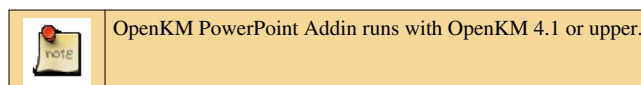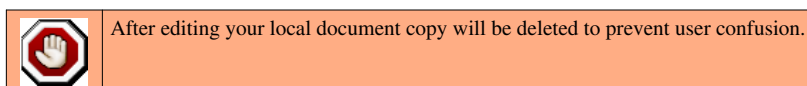
Edit OpenKM document

After making a click in 🖊️ document edit button, it'll appear a navigator browser. You must navigate across folders and select a document that you want to edit.

When you've got some OpenKM document opened, it'll be enabled 📋 **Upload modified document** (check-in) and 📋 **Cancel document edit**, toolbar option.

- **To upload modified document**, use the 📋 Upload modified document (check-in) toolbar button.
- **To cancel document editing**, use the 📋 Cancel document edit toolbar button.

> 🛑 After editing your local document copy will be deleted to prevent user confusion.

> 📝 OpenKM Word Addin runs with OpenKM 4.1 or upper.

Excel Addin

Office Addins are compatible from version 2000 to version 2007.

After installing Excel Adding it'll appears new "OpenKM" toolbar menu options.


Detail of the functions according to their icons:

- → Addin configuration
- → Add new document
- → Document edit (check-out)
- → Upload modified document (check-in)
- → Cancel document edit
- → Help

Configure OpenKM AddIn

First you must select OpenKM tool bar option to setting your configurations values for remote OpenKM accessing from client computer. If you've got other OpenKM AddIn yet installed it's not needed.

When you setting your configuration values is created **OpenKM folder** in your user **My documents folder**. Into OpenKM folder is created a configuration file called **openkm.xml** and other file called **document.xml** that OpenKM Addin uses to store some document editing information, you might not editing or deleting this file.

Uploading a new file

After making a click in 🗋 adding new document button, it'll appears a tree browser view. You must select the folder where you want to uploading the file.

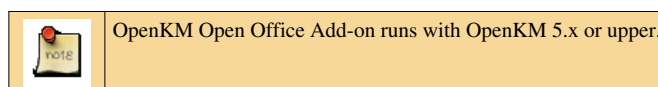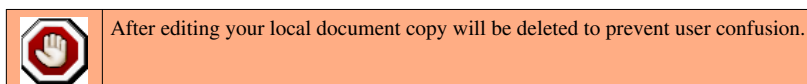Click on **Send** Button, and after document it'll be uploaded to OpenKM it'll appears a notification message.

Edit OpenKM document

After making a click in ✎ document edit button, it'll appear a navigator browser. You must navigate across folders and select a document that you want to edit.

When you've got some OpenKM document opened, it'll be enabled 📋 **Upload modified document** (check-in) and 📋 **Cancel document edit**, toolbar option.

- **To upload modified document**, use the 📋 Upload modified document (check-in) toolbar button.
- **To cancel document editing**, use the 📋 Cancel document edit toolbar button.

🛑	After editing your local document copy will be deleted to prevent user confusion.

📝	OpenKM Excel Addin runs with OpenKM 4.1 or upper.

PowerPoint Addin

Office Addins are compatible from version 2000 to version 2007.

After installing PowerPoint Adding it'll appears new "OpenKM" toolbar menu options.

Detail of the functions according to their icons:

- → Addin configuration
- → Add new document
- → Document edit (check-out)
- → Upload modified document (check-in)
- → Cancel document edit
- → Help

Configure OpenKM AddIn

First you must select OpenKM tool bar option to setting your configurations values for remote OpenKM accessing from client computer. If you've got other OpenKM AddIn yet installed it's not needed.

When you setting your configuration values is created **OpenKM folder** in your user **My documents folder**. Into OpenKM folder is created a configuration file called **openkm.xml** and other file called **document.xml** that OpenKM Addin uses to store some document editing information, you might not editing or deleting this file.

Uploading a new file

After making a click in adding new document button, it'll appears a tree browser view. You must select the folder where you want to uploading the file.

Click on **Send** Button, and after document it'll be uploaded to OpenKM it'll appears a notification message.

Edit OpenKM document

After making a click in 📝 document edit button, it'll appear a navigator browser. You must navigate across folders and select a document that you want to edit.

When you've got some OpenKM document opened, it'll be enabled 📄 **Upload modified document** (check-in) and 📄 **Cancel document edit**, toolbar option.

- **To upload modified document**, use the 📄 Upload modified document (check-in) toolbar button.

- **To cancel document editing**, use the 📄 Cancel document edit toolbar button.

> After editing your local document copy will be deleted to prevent user confusion.

> OpenKM PowerPoint Addin runs with OpenKM 4.1 or upper.

OpenOffice.org Add-on

OpenOffice AddOn

OpenOffice Add On is compatible from OpenOffice version 3.2 and OpenKM repository 4.x

After installing OpenOffice Add On, "OpenKM" appears as a new toolbar. It usually appears in the top-left of the OpenOffice window.
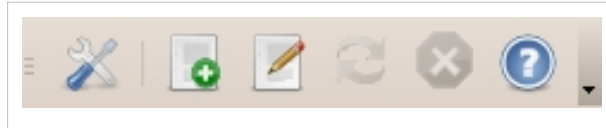
Details of the functions according to their icons:

- 🛠 → Add On configuration
- 📄 → Add new document
- 📝 → Document edit (check-out)
- 📤 → Upload modified document (check-in)
- ❌ → Cancel document edit
- ❔ → Help

Configure OpenKM Add On

First you must select OpenKM tool bar option to setting your configurations values for remote OpenKM accessing from client computer. If you've got other OpenKM AddIn yet installed it's not needed.
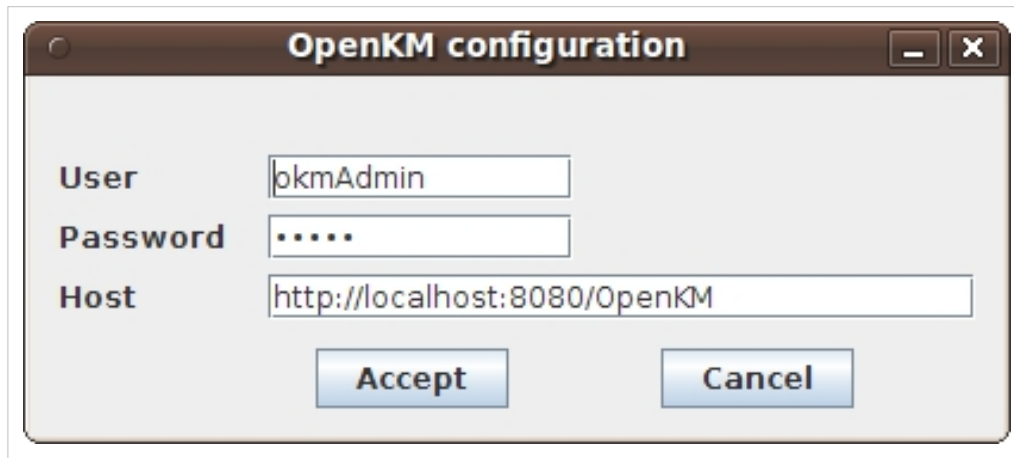
When you setting your configuration values is created **OpenKM folder** in your **user home**. Into OpenKM folder is created a configuration file called **openkm.xml** and other file called **document.xml** that OpenKM Add On uses to store some document editing information, you might not want to edit or delete those files.
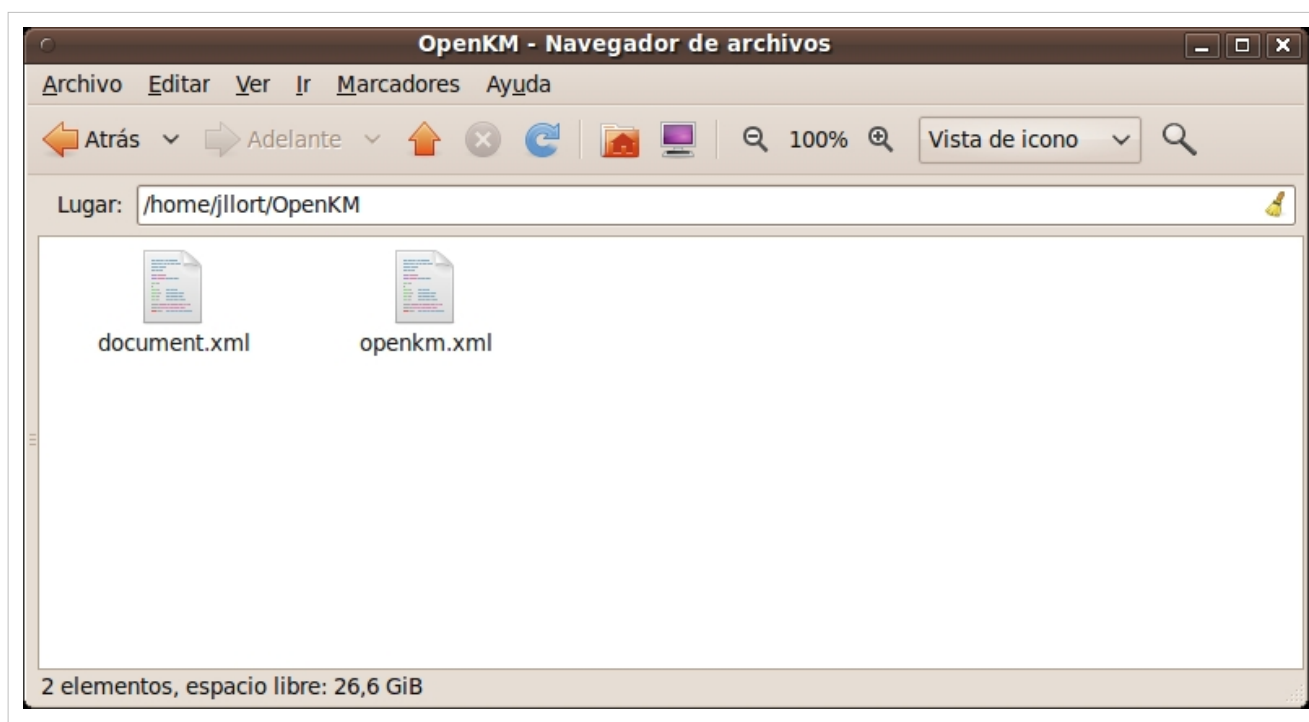
Uploading a new file

Before you begin, make sure the file you wish to upload is a) saved to disk (or OpenKM with throw up an error) and b) has the file name you wish it to have within the OpenKM repository otherwise (true up to at least OpenKM 5.0) you will have to go through the OpenKM web interface to change the filename). After clicking on the **add new document** button - , a tree browser window appears. You must select a folder within this window before you are permitted to upload the file.
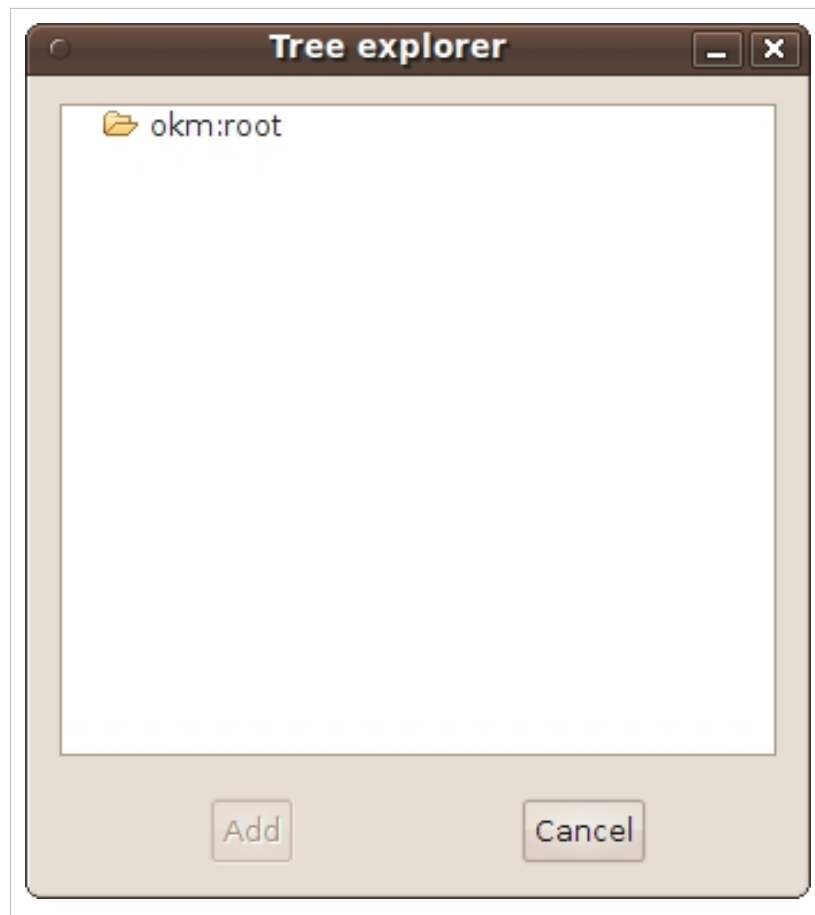
Once you've found the correct directory, highlight it and click the **Add** Button, and the document will be uploaded to OpenKM. Once the process is complete a notification window will pop-up.
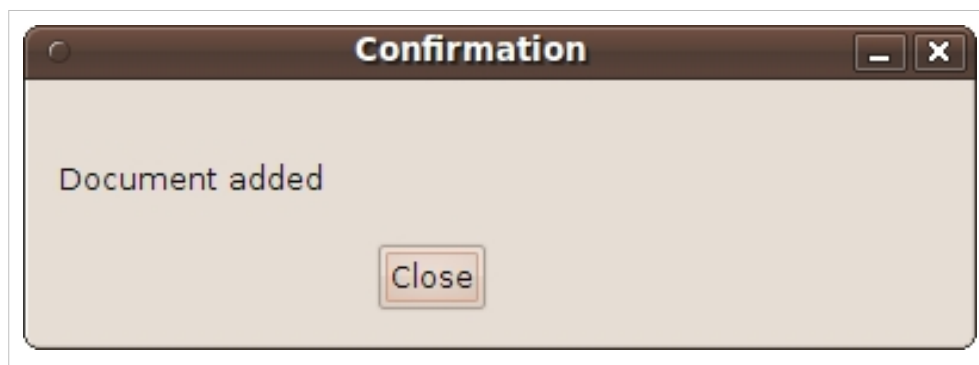
Edit OpenKM document

After making a click in 🖉 document edit button, it'll appear a navigator browser. You must navigate across folders and select a document that you want to edit.

When you've got some OpenKM document opened, it'll be enabled 🗗 **Upload modified document** (check-in) and 🗙 **Cancel document edit**, toolbar option.

- **To upload modified document**, use the 🗗 Upload modified document (check-in) toolbar button.
- **To cancel document editing**, use the 🗙 Cancel document edit toolbar button.

> 🛑 After editing your local document copy will be deleted to prevent user confusion.

> 📝 OpenKM Open Office Add-on runs with OpenKM 5.x or upper.
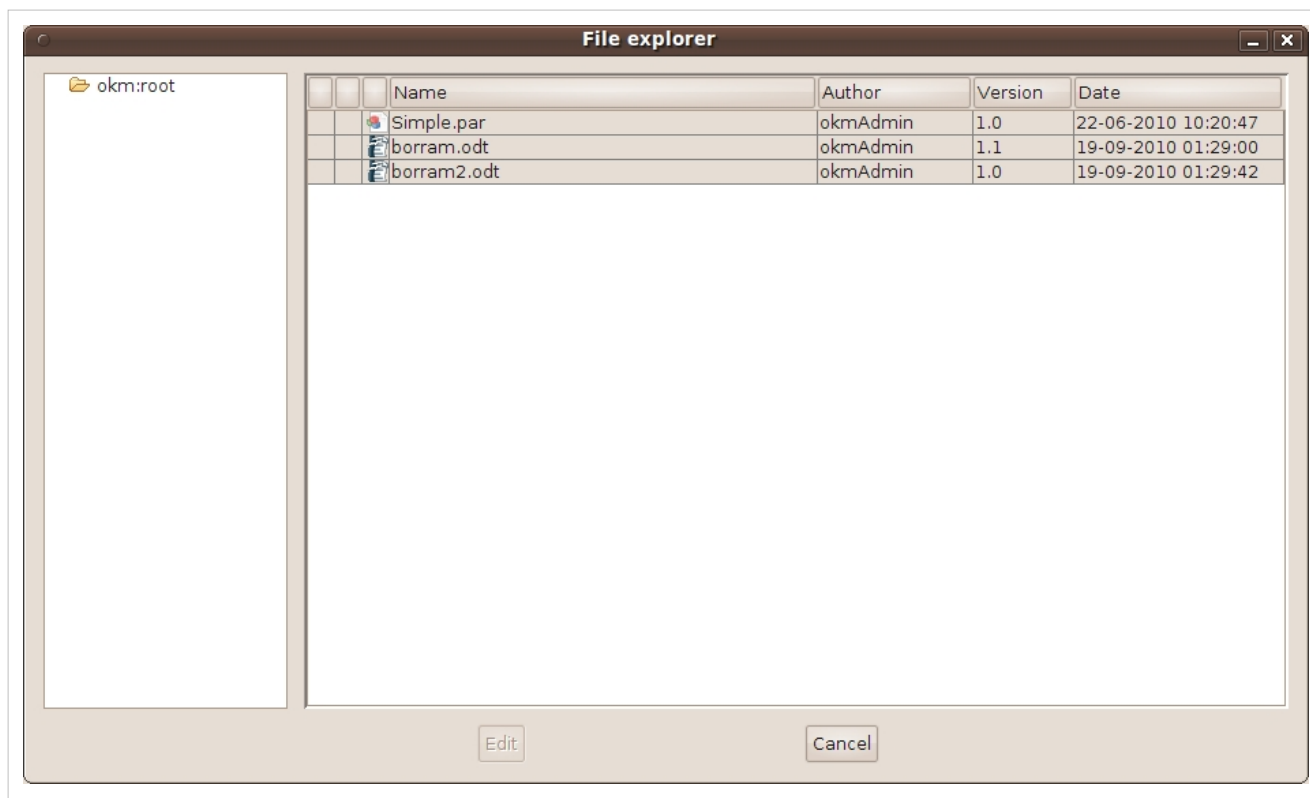
Troubleshooting

Linux users must remember installing packages:

```
openoffice.org-java-common
openoffice.org-java
```

Stapling

Stapling is only allowed in taxonomy, categories and thesaurus view. Folders, documents and mails can be stapled. Same folder, document or mail can be stapled several times in different groups.

Restrictions:

- Only stapling creator has privileges to add / delete more elements or deleting entire group. Rest of users only have downloading option.
- Mails can not be downloaded.
- If some users has no grants to downloading some document in a stapling, although could see it in stapling group can not downloading that file.

Detail of the functions according to their icons:

- → Start new stapling group / Staple element (same button has both functions).
- → Stop stapling group.
- → Delete some element on group.

Add new staplign group

First select some folder, document or mail.

	Folder, document or mail must be selected in file browser view.
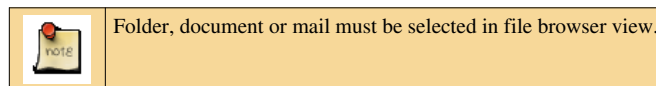
Click on start new stapling group icon (at bottom right it'll will appearing the message **"Stapling started"**).

Then select other folder or document and click other time in same icon , both elements are now stapled.

Continue selecting new elements and clicking in same icon to increasing number of elements stapled.

To finishing click on stop stapling group (at bottom right it'll will appearing the message **"Stapling finished"**)

Add more elements in a stapling group

Click on button "Add" in order selecting which group you want to add more elements (at bottom right it'll will appearing the message **"Stapling started"**).

Continue selecting new elements and clicking in same icon 🧊 to increasing number of elements stapled.

To finishing click on 🧊 stop stapling group (at bottom right it'll will appearing the message **"Stapling finished"**)
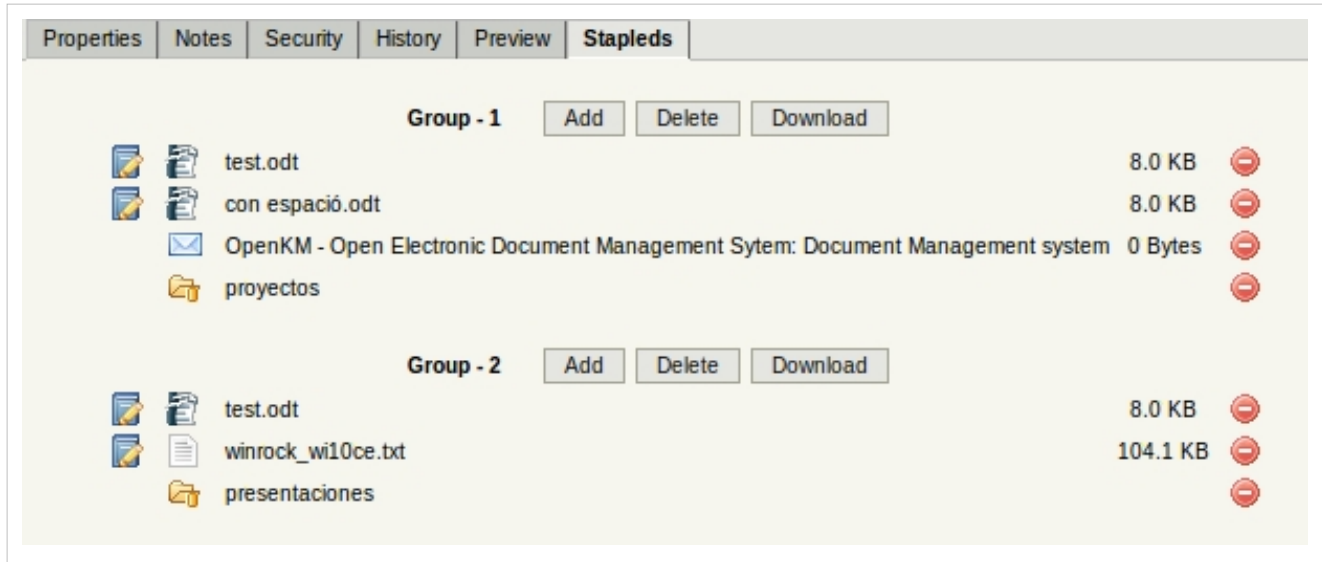
Autocad preview

AutoCAD previewer allows to make some basic operations like zoom in/out, rotate, show/hide layers and printing. AutoCAD preview extension allows convert AutoCAD files to PDF and preview it or preview DXF files. In Tools menu the AutoCAD option allows to selecting which preview conversion is enabled.

This feature supports DXF [1] and DWG [2] formats.
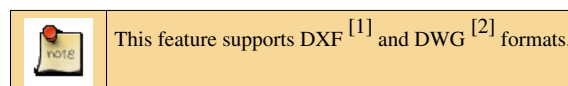
See also Third-party software integration: Acme CAD Converter.

Tools menu
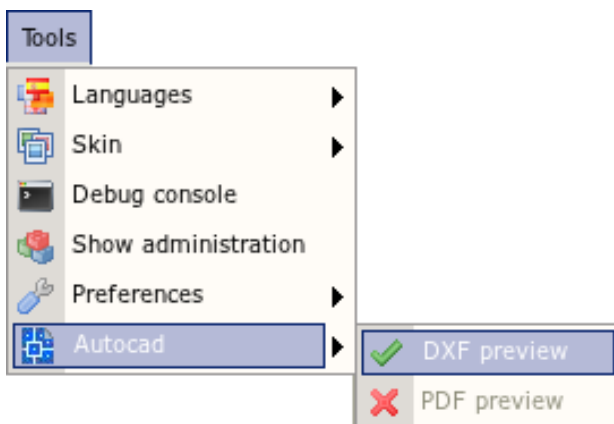
Toolbar

- Printing
-
- Zoom out
- Zoom in
- Cursor zooming
- Move draw
- Rotation
- Home
- Back
- Forward
- Rotate 90º left
- Rotate 90º right
- Fit on page

Default DXF preview

Preview with zoom

Preview with rotation
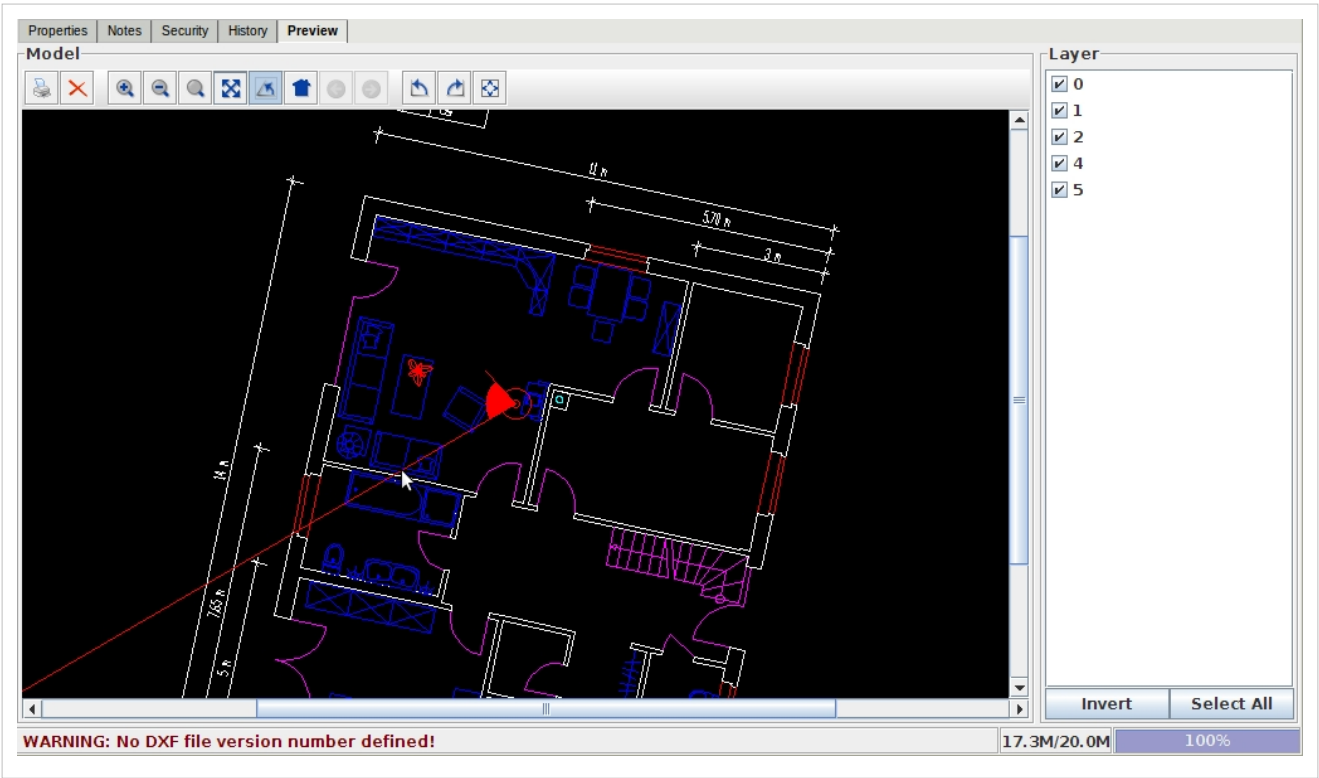
Preview hiding layers
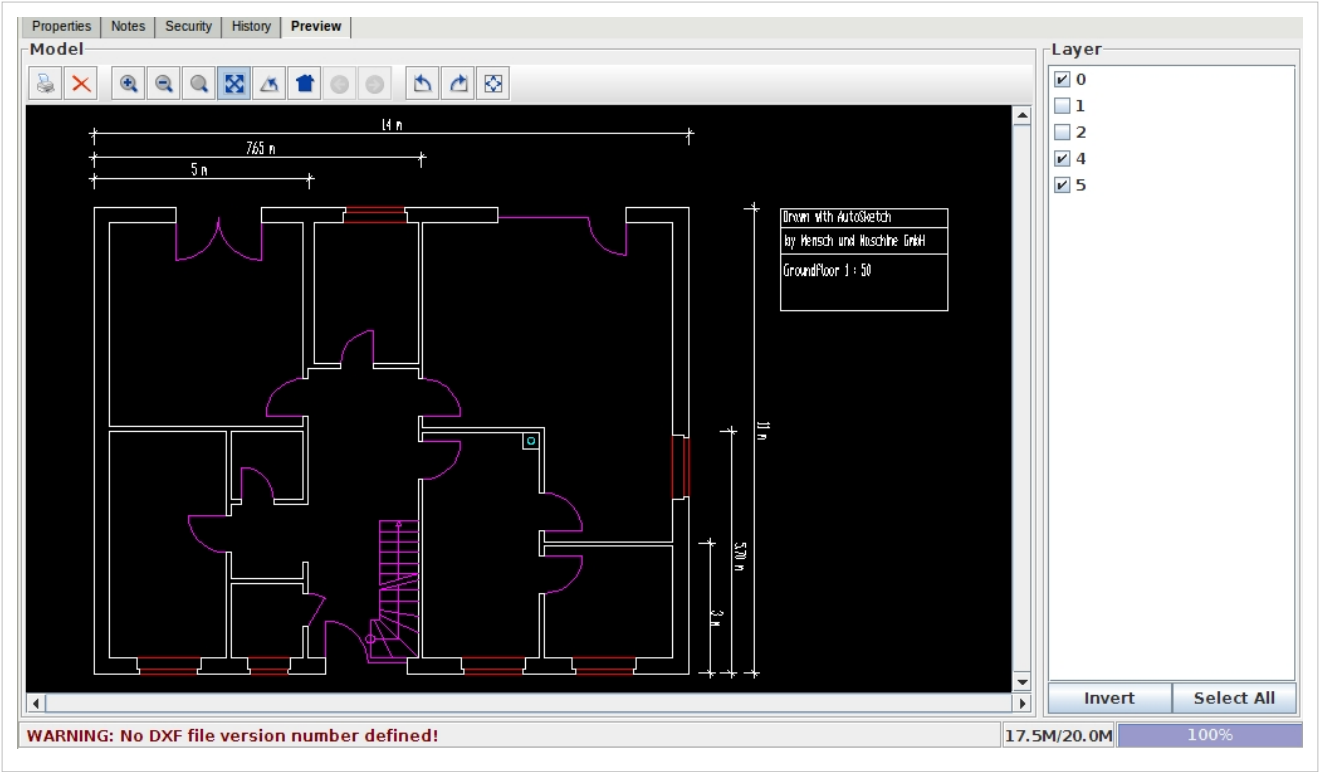
Default PDF preview

References

[1] http://en.wikipedia.org/wiki/DXF
[2] http://en.wikipedia.org/wiki/DWG
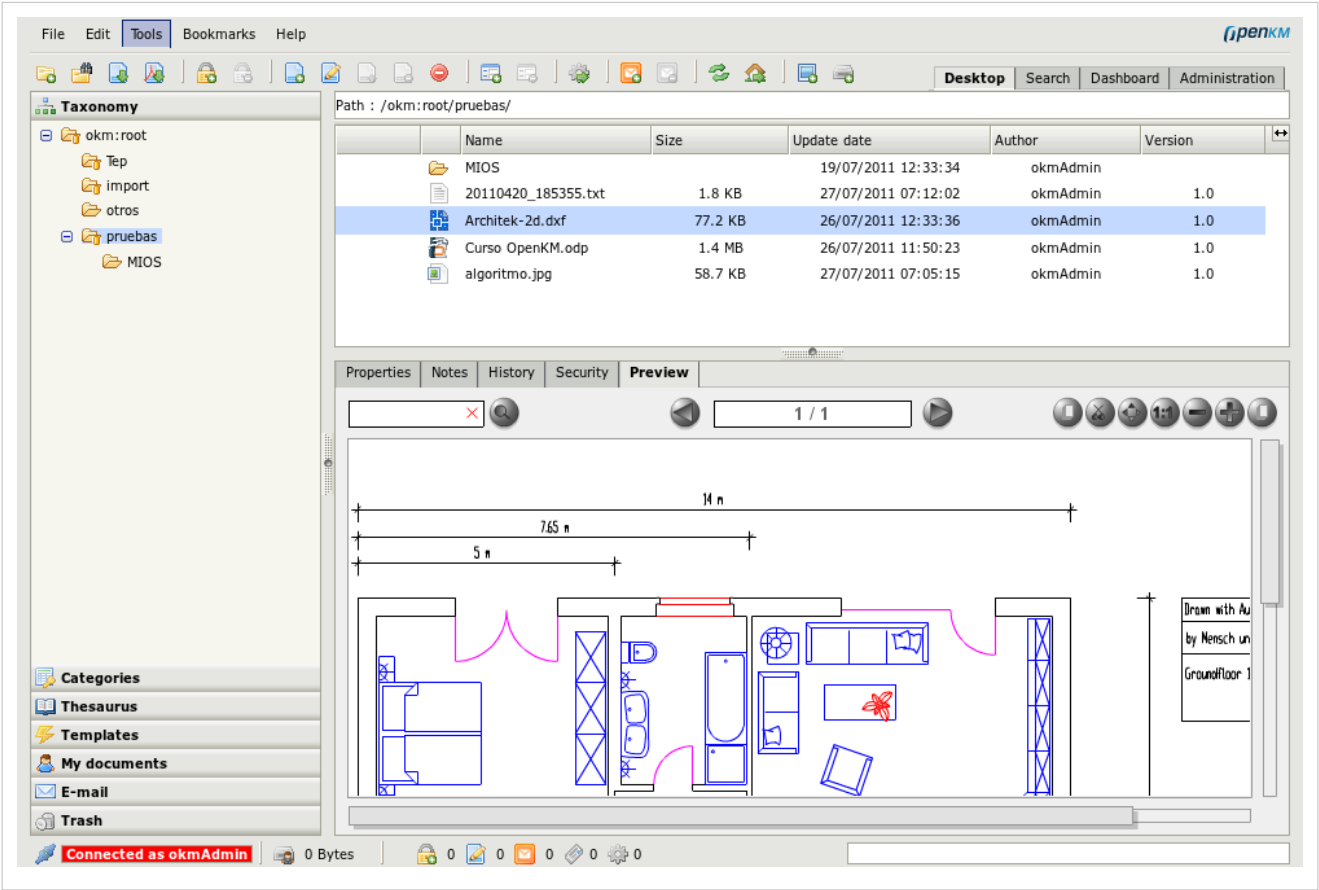
Messaging

Messaging extension allows propose documents and folders to users, share normal queries and user news queries with other users and sending text messages to users.

Messaging extension widgets are located at tools menu (send message option), at any document / folder view in taxonomy with icon option to send proposed folder/document subscription, at bottom desktop with tree icons to indicate when news proposed subscriptions, proposed query or user message has arrived and in dashboard view where all information is available in one view.
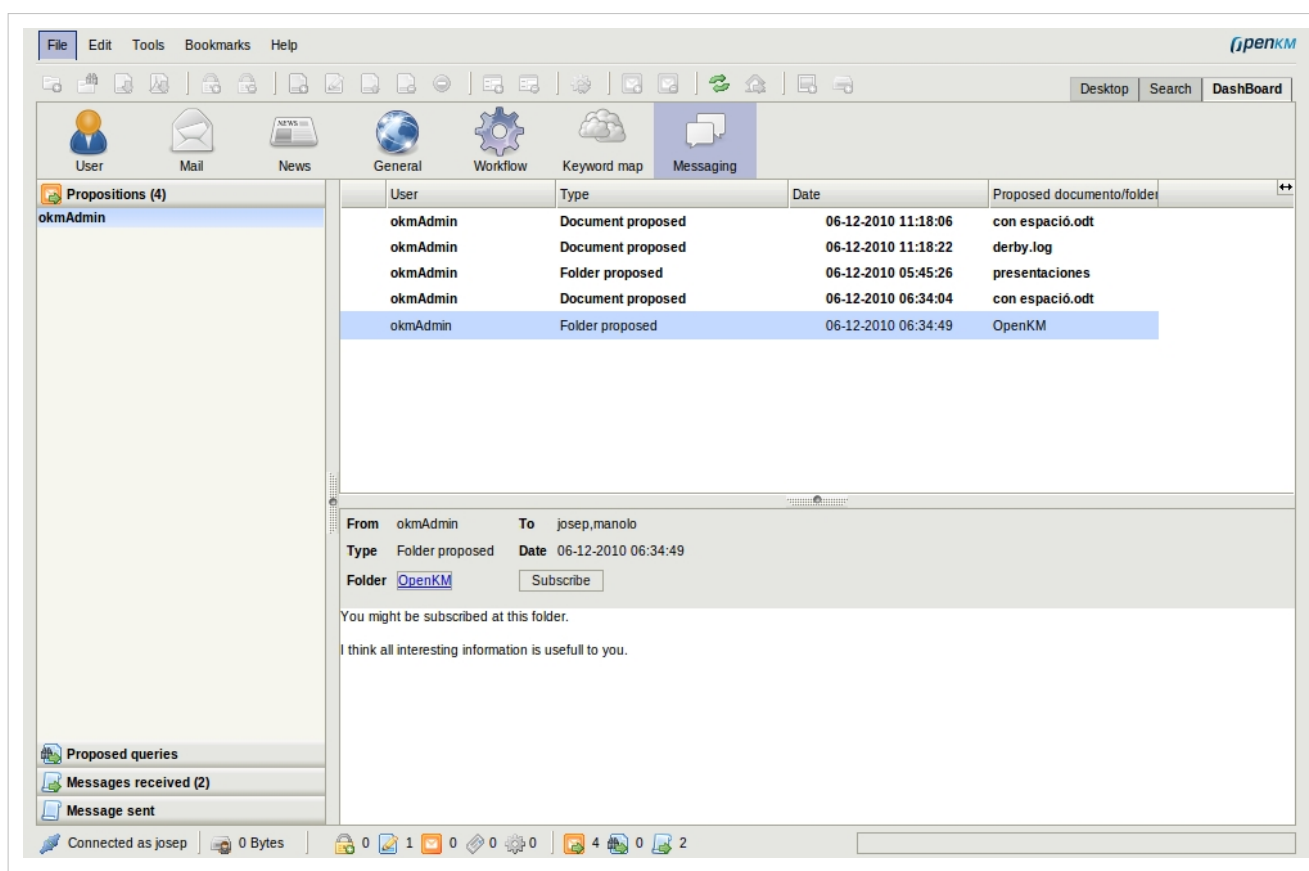
Description of the different icon options

- → Proposed subscriptions
- → Proposed query
- → Message received
- → Message sent

Proposing subscription

You can propose a subscription (document / folder) to any user or group of users (based in roles). For doing it simply select some document or folder, in document or folder properties view it'll appearing the propose subscription icon .

Click on the the propose subscription icon , it'll appearing the propose subscription popup.
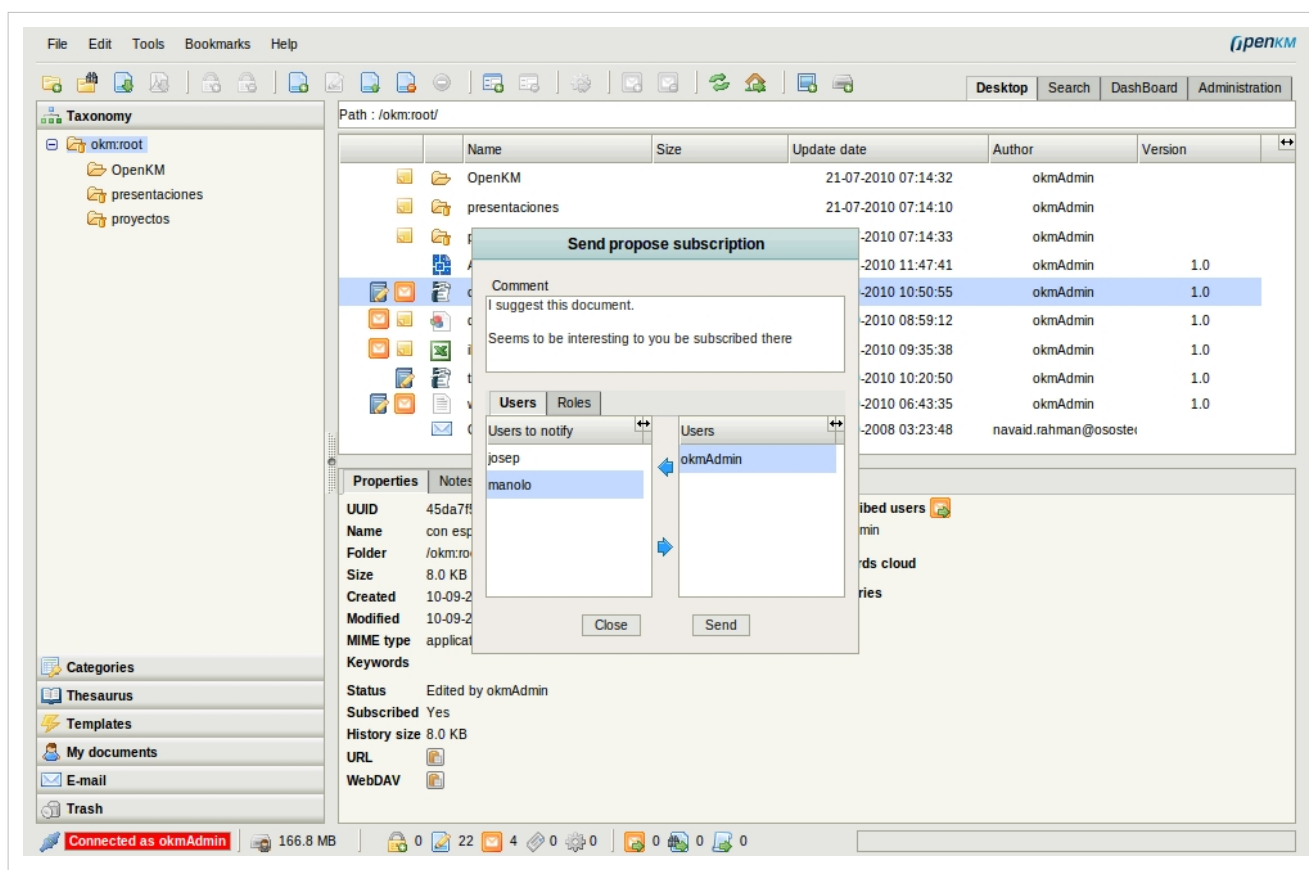
Select users and group of users (by roles) you want to propose the subscription. They'll receive the notification in the messaging panel.

Proposed subscription notification

At bottom UI Desktop panel, with messaging extensions appears tree new icons. Periodically OpenKM indicates to end user if new messages has arrived.
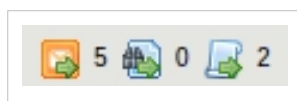
Making a click in proposed subscription icon (at bottom), OpenKM automatically open messaging view. In propositions tab, the proposed subscriptions are ordered by users who has sent.

End user proposed subscription received

In Dashboard view, end user, can take advantage of OpenKM proposed subscriptions received from other users. Selecting some proposed subscription you've got several options. Clicking at folder or document link, will go to document or folder desktop location or simply pressing subscribe option to making the subscription (It'll appearing a icon to indicate you've yet done it operation). You can also delete a proposed subscription (single) or all proposed by users with appropriate contextual menus is stack and explorer panels.

Proposing shared query

You can propose a shared query (stored / users news) to any user or group of users (based in roles). For doing it simply select some query, in search view. In contextual menu it'll appearing the propose query icon .

Select users and group of users (by roles) you want to propose the query. They'll receive the notification in the messaging panel.

Proposed query notification

At bottom UI Desktop panel, with messaging extensions appears tree new icons. Periodically OpenKM indicates to end user if new messages has arrived.

Making a click in proposed query icon ![icon] (at bottom), OpenKM automatically open messaging view. In proposed queries tab, the proposed queries are ordered by users who has sent.

End user proposed queries received

In Dashboard view, end user, can take advantage of OpenKM proposed queries received from other users. Selecting some proposed query you've got several options. Clicking at query link, will executing the query in search view (here, for example you can save as own) or simply pressing accept option to accepting the shared query (It'll appearing a icon to indicate you've yet done it operation). You can also delete a proposed query (single) or all proposed by users with appropriate contextual menus is stack and explorer panels.
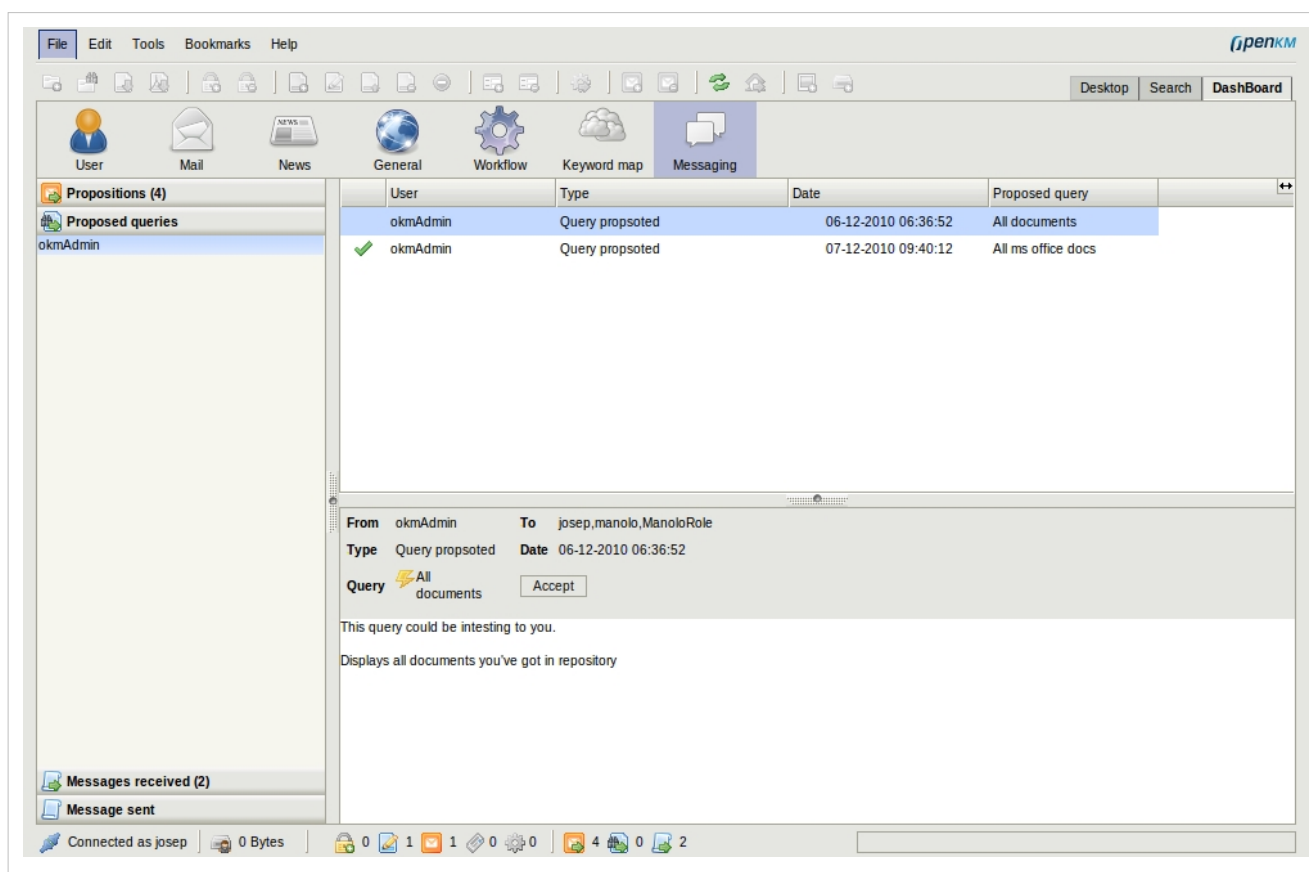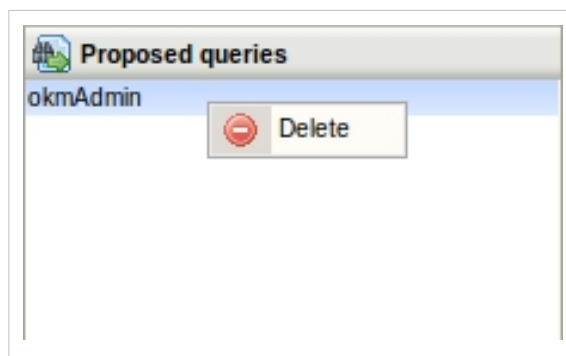
When end user accepts a proposed query, this will appearing in search view with the shared query icon . User who proposed the query can modify it, that means any change made by owner of the query has immediate effects on users with who's sharing.

Sending message

You can sending a message to any user or group of users (based in roles). For doing it simply open tools menu / messaging and select the option send new message.
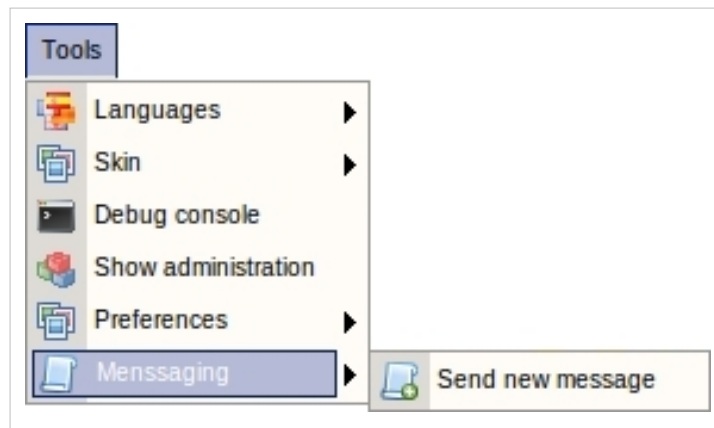
It'll appearing the new message popup.
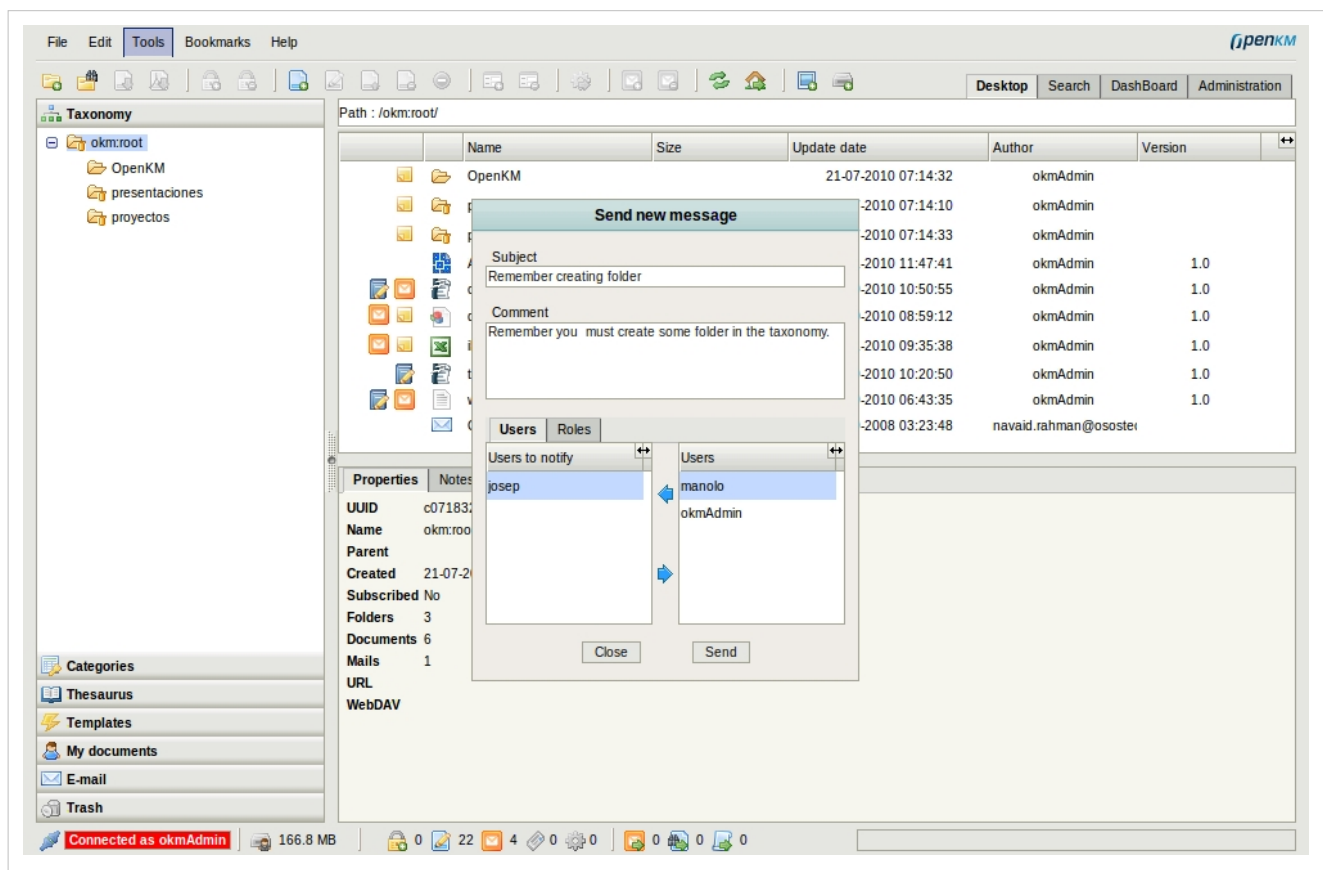
Select users and group of users (by roles) you want to send the message. They'll receive the notification in the messaging panel.

New message notification

At bottom UI Desktop panel, with messaging extensions appears tree new icons. Periodically OpenKM indicates to end user if new messages has arrived.

Making a click in new message icon ![icon] (at bottom), OpenKM automatically open messaging view. In message received tab, the messages are ordered by users who has sent.

End user messages received

In Dashboard view, end user, can take advantage of OpenKM messages received from other users. Selecting some message received you can see all message details. You can also delete a proposed query (single) or all proposed by users with appropriate contextual menus is stack and explorer panels.

Users messages sent view

Any kind of message sent by some user is registered (proposed subscription / proposed query / message sent) and can be seen in message sent view. All message sent are ordered by user who has been sent (althought it'll be included in some role at the moment was sent). You can also delete a message sent (single) or all sent to some user with appropriate contextual menus is stack and explorer panels.

Downloading restricted buttons

Downloading restricted buttons extensions is useful for administrator who wants sharing documents to externals users or some users but without downloading grants.

Downloading restricted buttons is so simply understanding how runs. Simply any users who has not **NoDownloadingRestrictionRole** can not downloading files. That feature must be properly configured in concordance with profiles options where default donwloading options might be disabled there for all users. The idea is that only some users will have the **NoDownloadingRestrictionRole** that will be able to downloading any document, if has privileges for it.
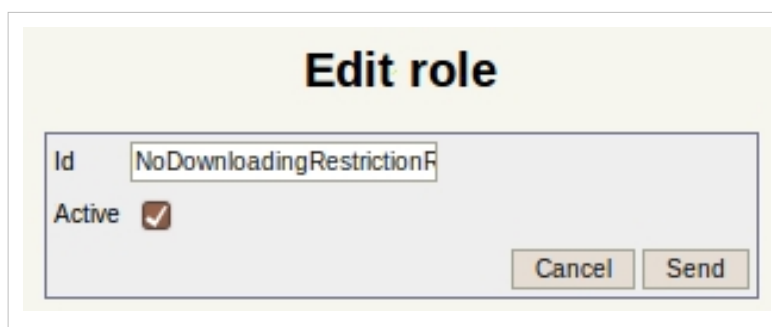
That solves the general problem, that in some cases is wanted some uses could read documents, but not downloading.

When extension is enabled it'll be appearing two new button at right toolbar.

In the next screenshot user has not the role **NoDownloadingRestrictionRole** reason why can not downloading file (take look at right corner at tool bar button).
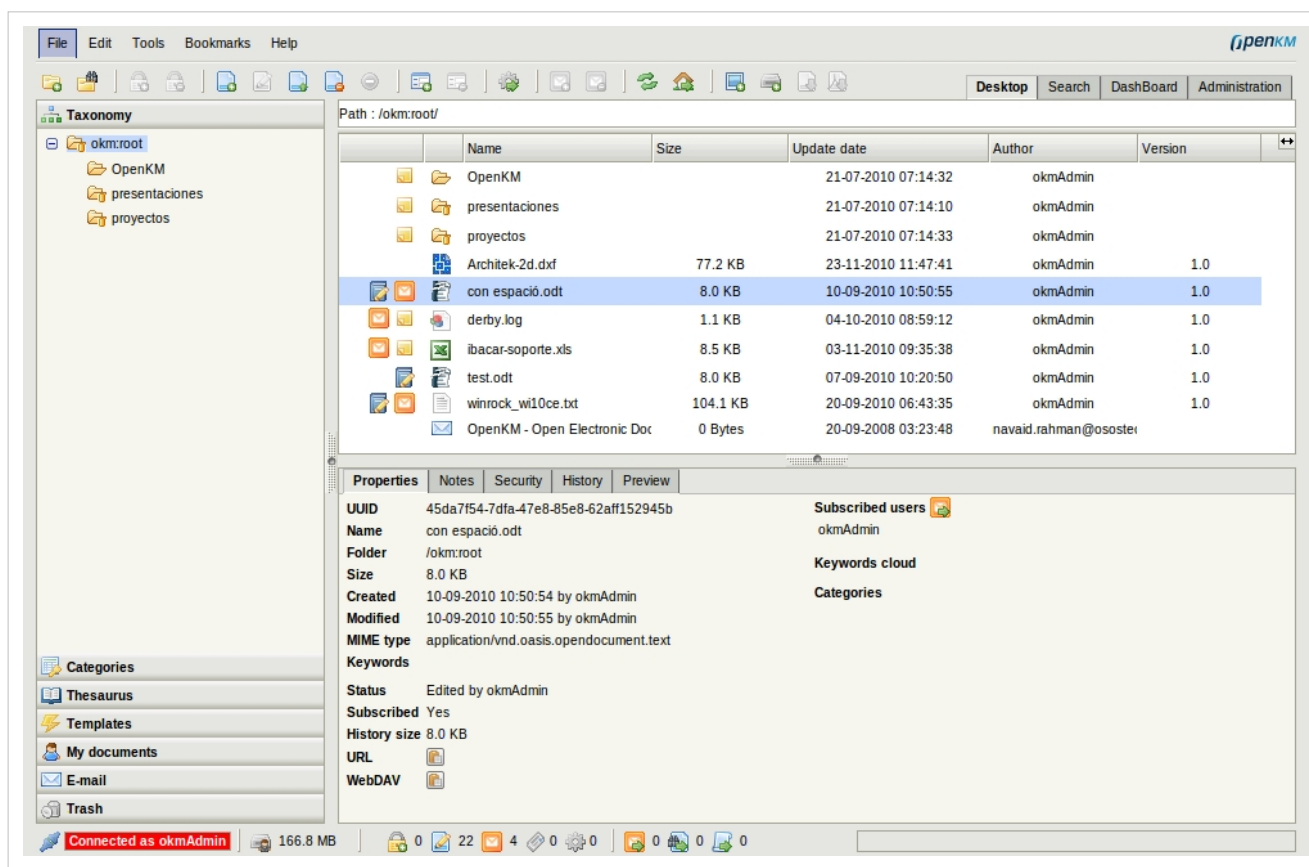
In the next screenshot user has the role **NoDownloadingRestrictionRole** that in combination with normal grants allows user to downloading file (take look at right corner at tool bar button).
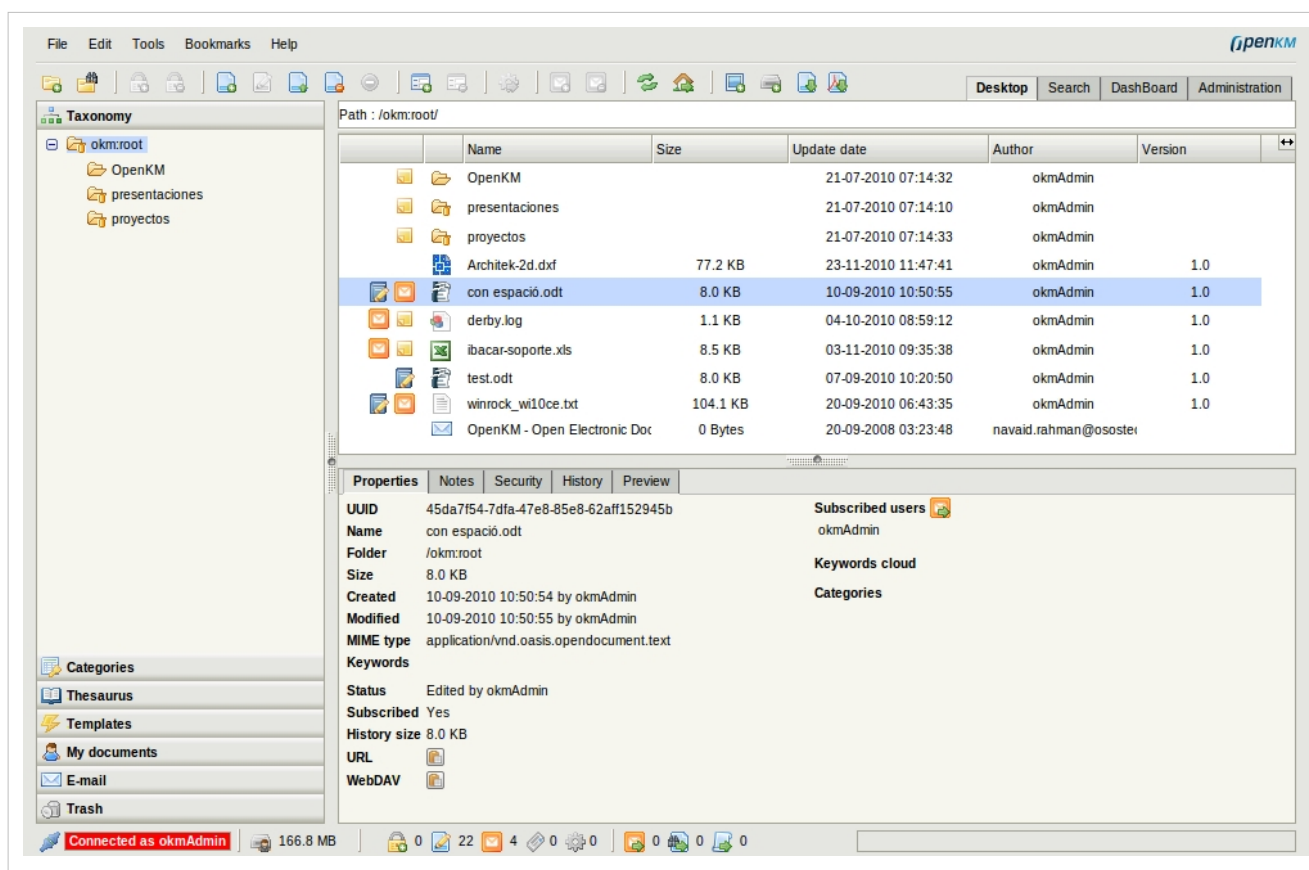
Stamp

Stamp is only allowed in taxonomy view for any document which can be converted to PDF or be a PDF. In order to stamp a document is necessary and working integration with OpenOffice. Take a look at OpenOffice.org or Application_configuration.

Restrictions:

- Only allowed for documents convertible to PDF or PDF files.
- Has write privileges on folder.
- Only allowed on taxonomy view.

Detail of the functions according to their icons:

- → Start stamping a document

Stamping a document

Fist select a document (convertible to PDF or PDF) in taxonomy view, then click 🔨 the stamp icon. Will appear a popup.
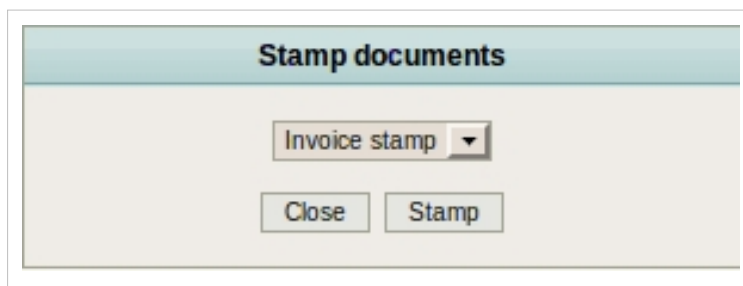
Several stamp types can be assigned in administration view to each user. User must select one of the available stamp he's got and execute it. After some time it'll be generated a new PDF file (or new version PDF file in case the selected stamped file was a PDF).
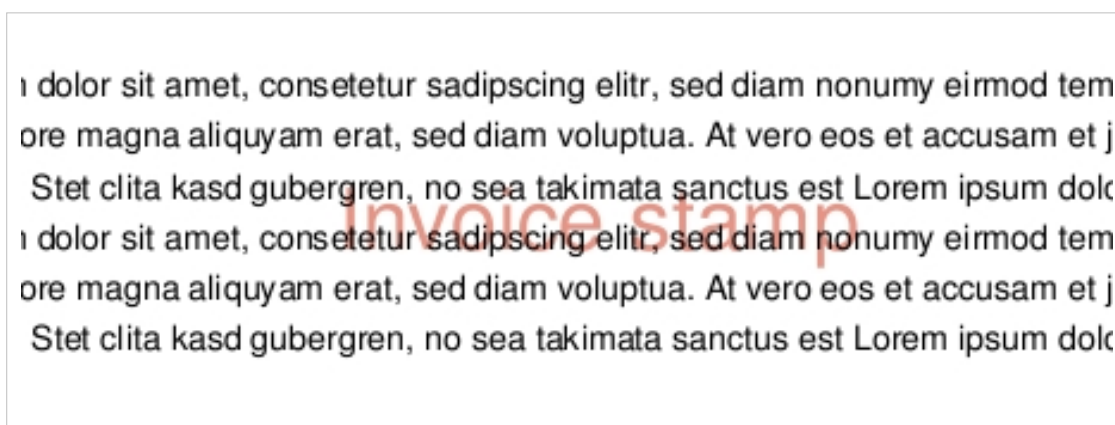
Stamp administration

In the administration, the stamps can be manager. You can create text or image based stamps.

It can be added new or edit available.

En **Opacity** equals to 0 means a transparent text or image and you won't see it. Set to 0.5 to see an semi-transparent text or set to 1 to be opaque. Also play with layer to stamp over or below the default text layer.

In image stamp it's shown image stamp definitions.

In **Expr. X** and **Expr. Y** input fields you can put more than a simply number. Currently the following macros are defined:

* IMAGE_WIDTH
* IMAGE_HEIGHT
* PAGE_WIDTH
* PAGE_HEIGHT
* PAGE_CENTER
* PAGE_MIDDLE

So to center a stamp in the page you can use:

* **Expr. X**: PAGE_CENTER - IMAGE_WIDTH / 2
* **Expr. Y**: PAGE_MIDDLE - IMAGE_HEIGHT / 2

A new image can be added or edit the actual one.

Using the test icon it's generated a testing file

Digital signature

Digital signature allow to sign documents with installed certificates. Can be signed a document yet uploaded or a new document. Only can be signed documents that can be converted to pdf. In case document is pdf, then new document version is uploaded after siging, in case is only a convertible one, is uploaded a new pdf file with same name that the original document in same folder destination than origin.

Restrictions:

• Only allowed for documents convertible to pdf or pdf files.

• Have write grants for inserting or uploading a new file version.

• Only allowed in taxonomy view.

• **Sign document** is not compatible in **add document form** with **import document from ZIP** option.

Sign an existing document

Select a pdf or a convertible to pdf file. Go to tools menu and select **sign document** menu option.
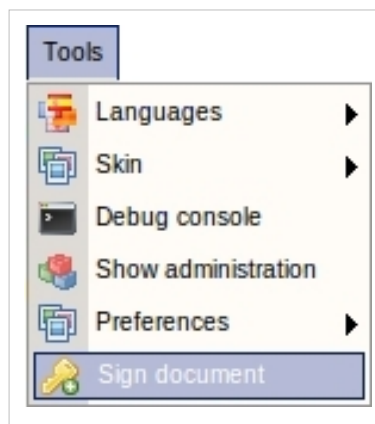
It'll appearing a popup, you must select there the certify you want to use to signing document.

When document is finished to sign, it'll be appearing a popup message.

In history tab, can see a comment "signed" and a version change if the original document was pdf file.

Signing a new document

In case you want to sign a new document in OpenKM, simply in the uploading add document form check the option
sign document.

If there's some assigned wizard to document it'll appearing the sequence, and the last it'll be the sign popup.

When document is finished to sign, it'll be appearing a popup message.

In history tab, can see a comment "signed" and a version change if the original document was pdf file.

If the document is a pdf, it'll be uploaded the original document and the signed one as a new document version. If document is only a convertible to pdf, then it'll be uploaded that document and generated a new signed pdf file too.

Document encryption

Cryptography allows to plus documents protection in OpenKM. With cryptography extension can upload a new encrypted document, encrypt and decrypt existing document, edit and checkin encrypted document and download and decrypt encryted documents. In order making the cryptography process more secure are files are encrypted and decrypted in local user computer by a signed applet. That mean any networking file traffic is always with encrypted documents.

All Cryptography options are available at tool menu:
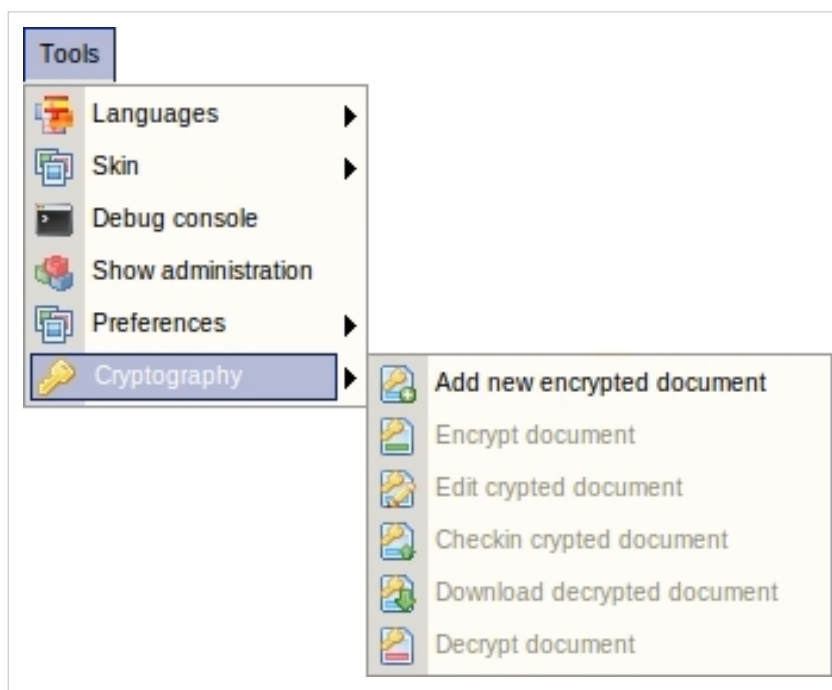
Restrictions

- Cryptography is only allowed in taxonomy view.
- Must have write privileges on document and folder to perfom cyptography operations.
- For editing purpose, document might not be locked or checkout by other user.

Description of different icon options

- → Add new encrypted document
- → Encrypt document
- → Edit encrypted document
- → Checkin encrypted document
- → Download decrypted document
- → Decrypt document

Add new encrypted document

First must be selected some folder in taxonomy where user has write privileges to uploading a document. Then select the **Add new encrypted document** menu option. It'll appearing a crypt popup.
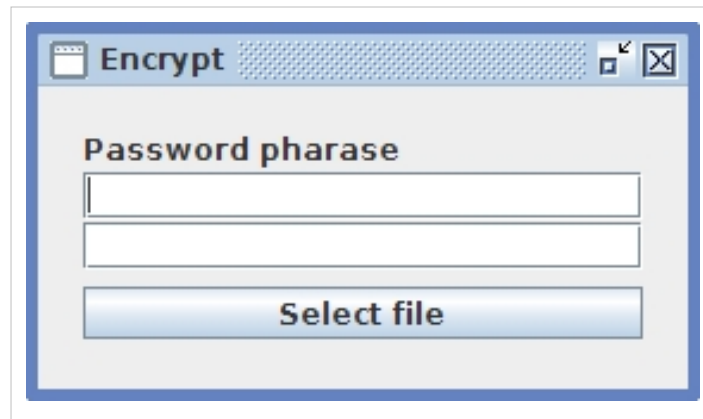
Now simply put your cryptopharase twice, and select the file pressing the **select file** button. After it the document it'll be encrypted locally with cryptophrase and uploaded to OpenKM. When it process it'll be finished it'll appearing a successfully uploading popup message.
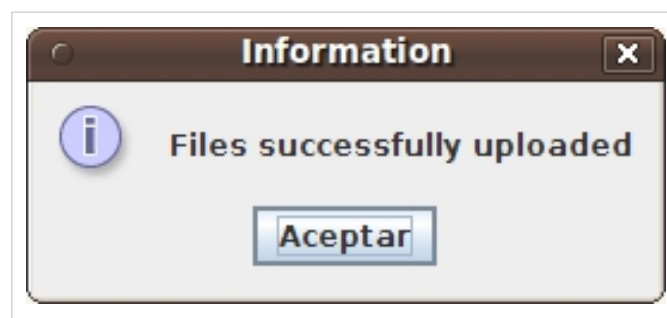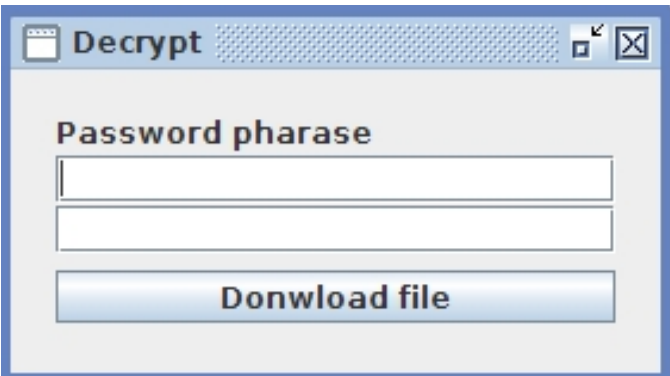
The OpenKM document explorer UI will be refreshing and will appearing the new document uploaded with the icon indicating that's a encrypted document.

		Name	Size	Update date	Author	Version	↔
	📂	test		11-01-2011 09:32:03	okmAdmin		
	📂	test2		11-01-2011 11:42:10	okmAdmin		
🔑	📄	backup.txt	304 Bytes	12-01-2011 04:34:01	okmAdmin	1.0	

Path : /okm:root/
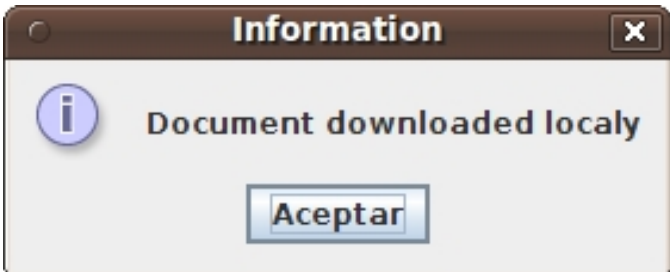
Download decrypted document

That operation downloads a encrypted document and decrypts it locally. First must selecting some encrypted document in OpenKM UI. Then selecting the 🔳 **Download decrypted document** will appearing a decrypt remote OpenKM document popup.

Then must put decryptphrase and selecting the directory where you want to downloading the OpenKM document decrypted. Then OpenKM will download the encrypted document localy, decrypt and save. After it it'll appearing a information popup indicating the document has been saved localy.

Edit encrypted document

In order updating some encrypted document must be selected the 📝 **Edit crypted document** menu option. It'll appearing a decrypt popup.
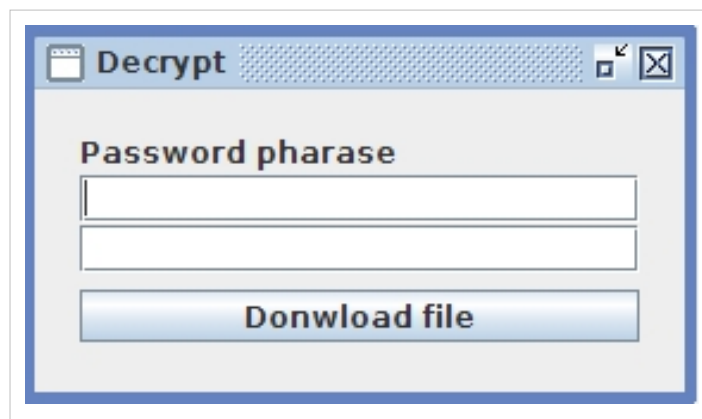
Then must put decryptphrase and selecting the directory where you want to downloading the OpenKM document decrypted. Then OpenKM will download the encrypted document locally, decrypt and save. After it it'll appearing a information popup indicating the document has been saved locally.
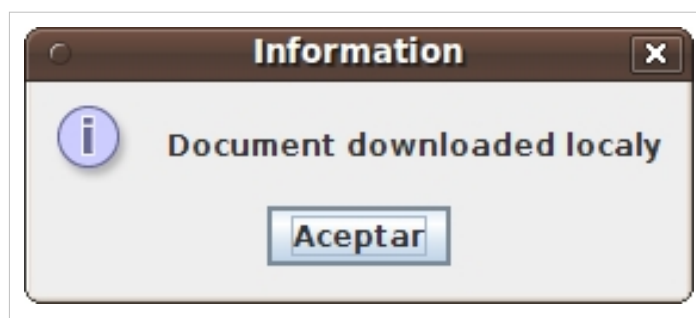
The OpenKM document explorer UI will be refreshing and will appearing the document marked for editing.

		Name	Size	Update date	Author	Version	
	📂	test		11-01-2011 09:32:03	okmAdmin		
	📂	test2		11-01-2011 11:42:10	okmAdmin		
📝🔑	📄	backup.txt	304 Bytes	12-01-2011 04:34:01	okmAdmin	1.0	

Path : /okm:root/
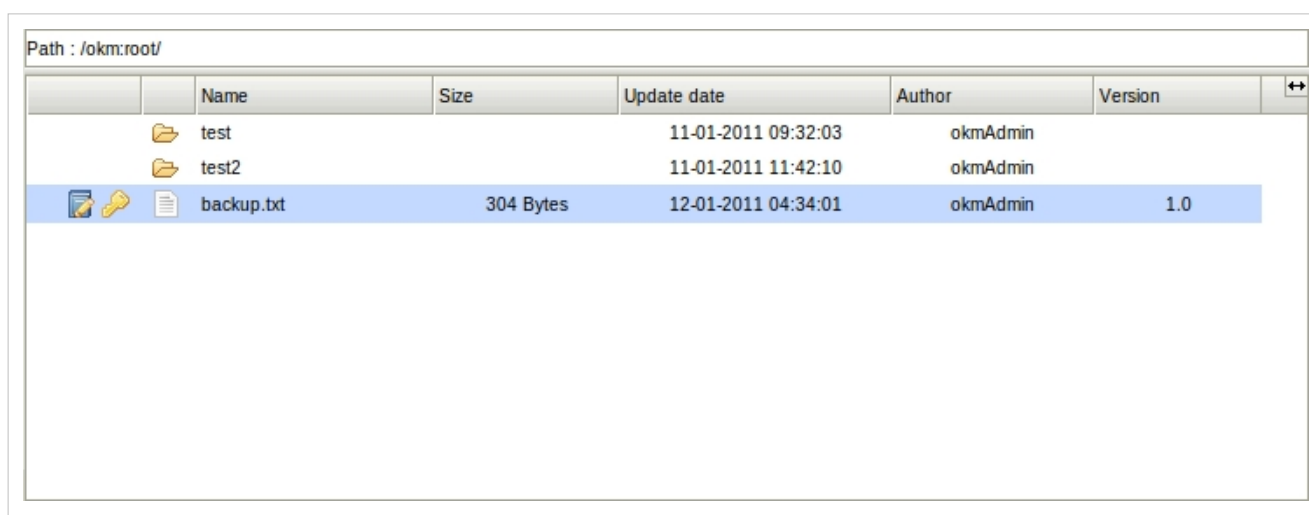
Checkin crypted document

After making changes in local document (decrypted using **Edit encrypted document** menu option) must upload new document version to OpenKM repository. First will selecting the document that want to upload in OpenKM.
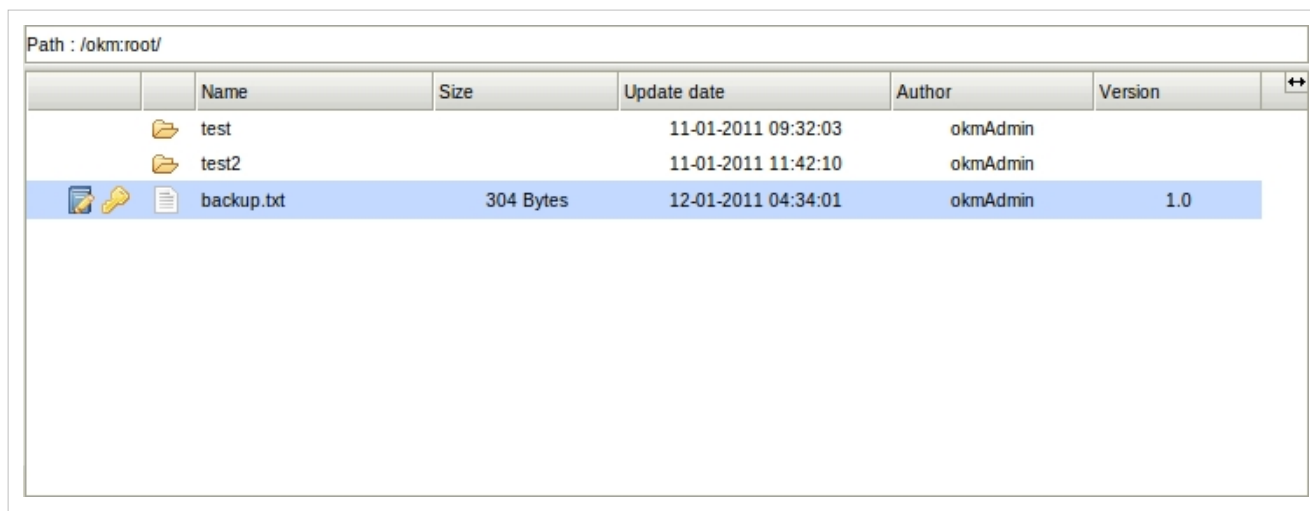
Then will selecting the **Checkin encrypted document** menu option. Will appearing a appearing a crypt popup.
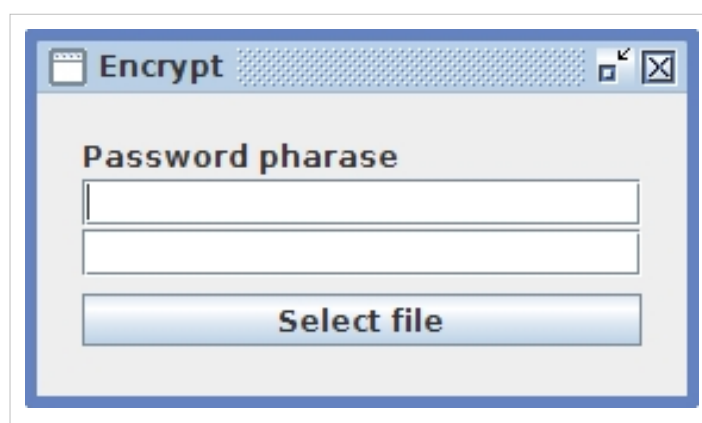
Now simply put your cryptopharase twice, and select the file pressing the **select file** button. After it the document it'll be encrypted locally with cryptophrase and uploaded to OpenKM. When it process it'll be finished it'll appearing a successfully uploading popup message.
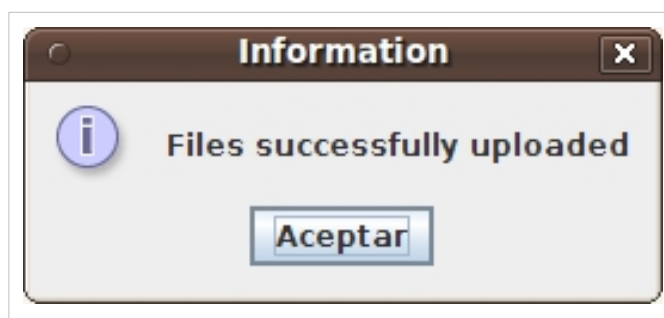
The OpenKM document explorer UI will be refreshing and will appearing the document with major version.

Cancelling checkin can be done with the normal **cancel checkin** button available in toolbar

Decrypt document

Decrypt document will decrypt some encrypted document in OpenKM and will replace for that decrypted version. For security purpose all previous encrypted document versions will be removed and replaced by decrypted document. Encrypted document will be downloaded and decrypted locally, then upload to OpenKM and purge version history.

First must selecting some encrypted document yet available at OpenKM.

Then selection the 🔓 **Decrypt document** menu option. It'll appearing a decrypt menu popup.
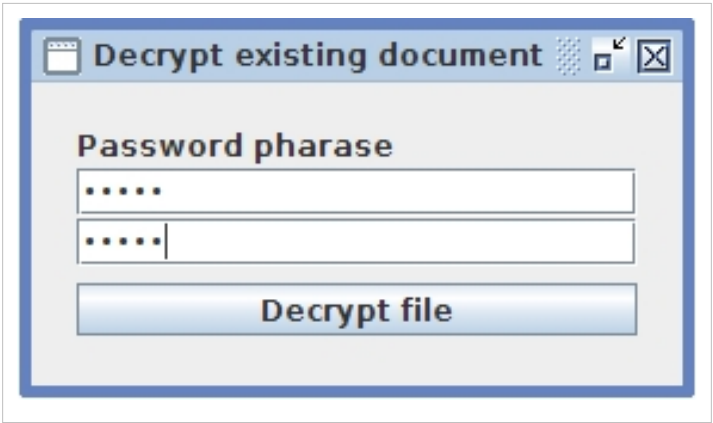
Then must put decryptphrase and selecting the **Decrypt file button**. The encrypted document will be downloaded and decrypted locally and then uploaded to OpenKM and history version will be purged too. I'll appearing a information popup indicating that operation has done sucessfully.
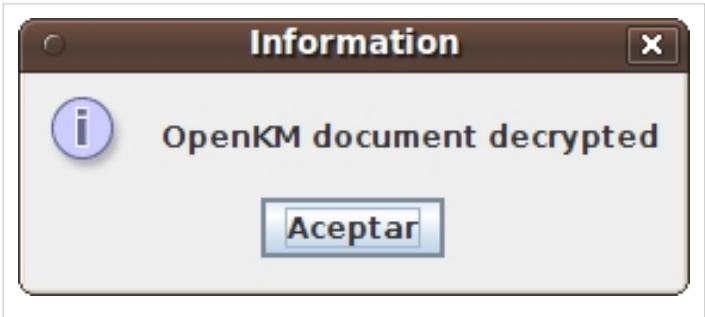
The OpenKM document explorer UI will be refreshing and will appearing the document decrypted with major version and with history purged.
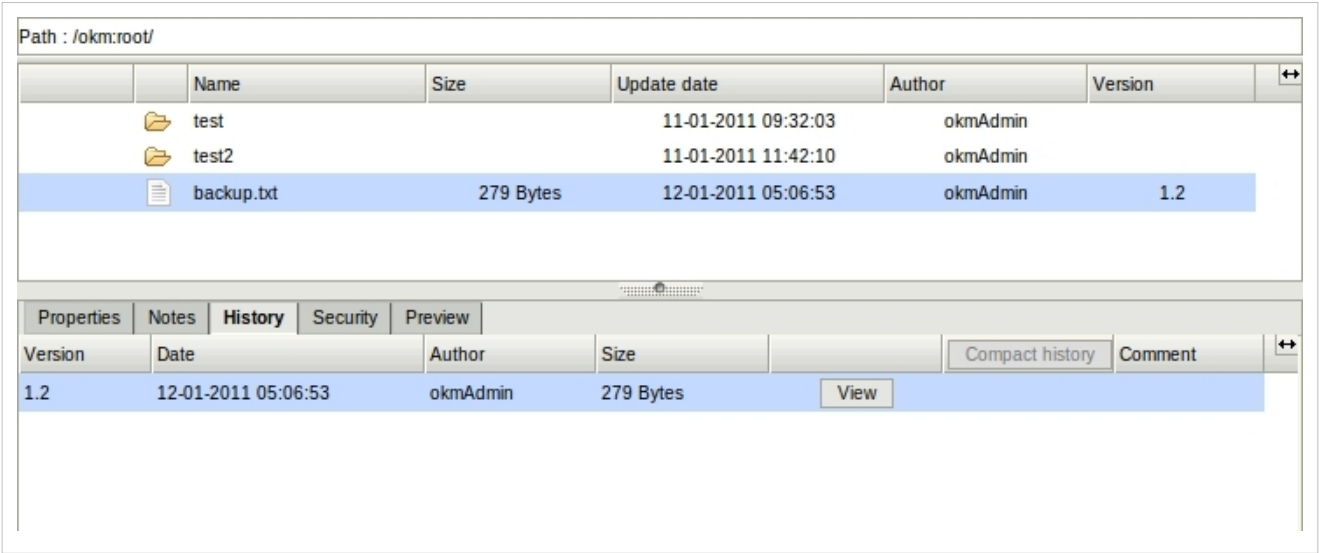
Encrypt document

Encrypt document will encrypt some non encrypted document in OpenKM and will replace for that encrypted version. For security purpose all previous document versions will be removed and replaced by encrypted document. Openkm document will be downloaded and encrypted locally, then upload to OpenKM and purge version history.

First must selecting some non encrypted document yet available at OpenKM.
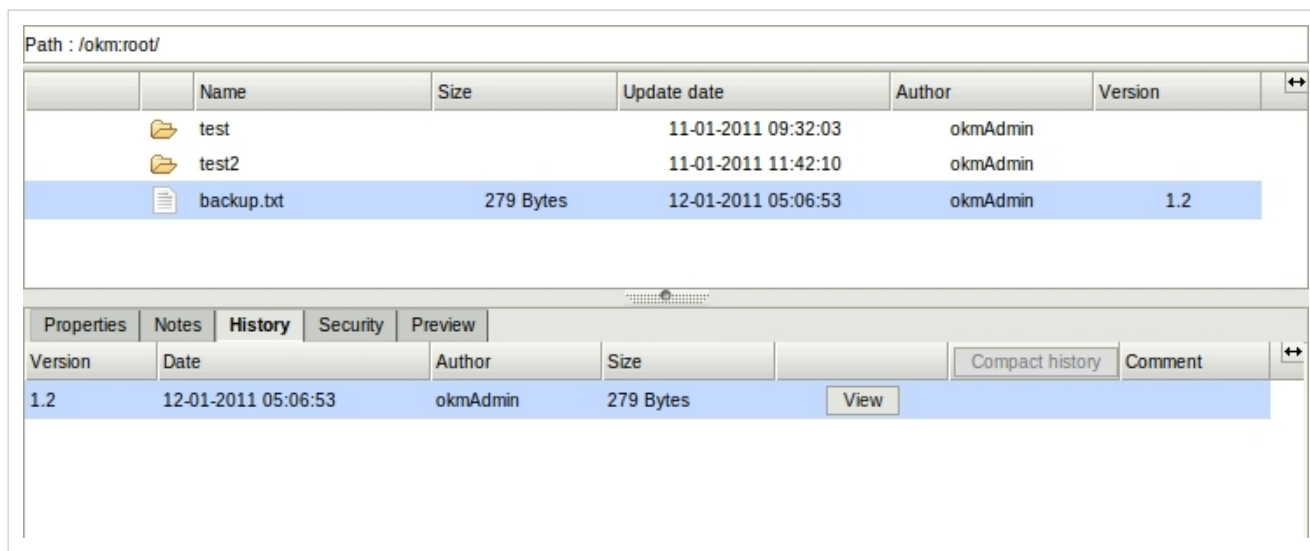
Then selecting the ![icon] **Encrypt document** menu option. The document will be downloading locally, encrypted, uploaded to OpenKM and purge history version.

The OpenKM document explorer UI will be refreshing and will appearing the document encrypted with major version and with history purged.

Contacts

Contacts allow to assign contacts to documents, folders and mails. There are two available options, manage contacts in tool menu and assign contacts using Contact tab on documents, folder or mail tab view.

Retrictions

- You need write grants to adding a contact to some document / folder / mail.
- You need delete grants to removing a contact to some document / folder / mail.

Description of different icon options

- ▦ → Manage contacts
- ▦ → Add contact
- ✎ → Edit contact
- ⊖ → Delete contact

Manage contacts

Go to tools menu, and select the option **manage contacts**.

It'll be open a popup.

Making **double click on contact** or clicking on **edit icon contact** 🖉 can be edited.

Selecting **update button** contact record will be updated, if you want to cancel editing must selecting **cancel button**.

If you want to create a new contact from manage contacts view, must selecting the **new contact button**. It'll appearing a new contact with empty fields. Name field is mandatory.

Selecting **add button** contact record will be saved, if you want cancel editing must selecting **cancel button**.

If you want to delete a contact, must click on delete icon ⊖ . It'll appearing a confirmation popup.
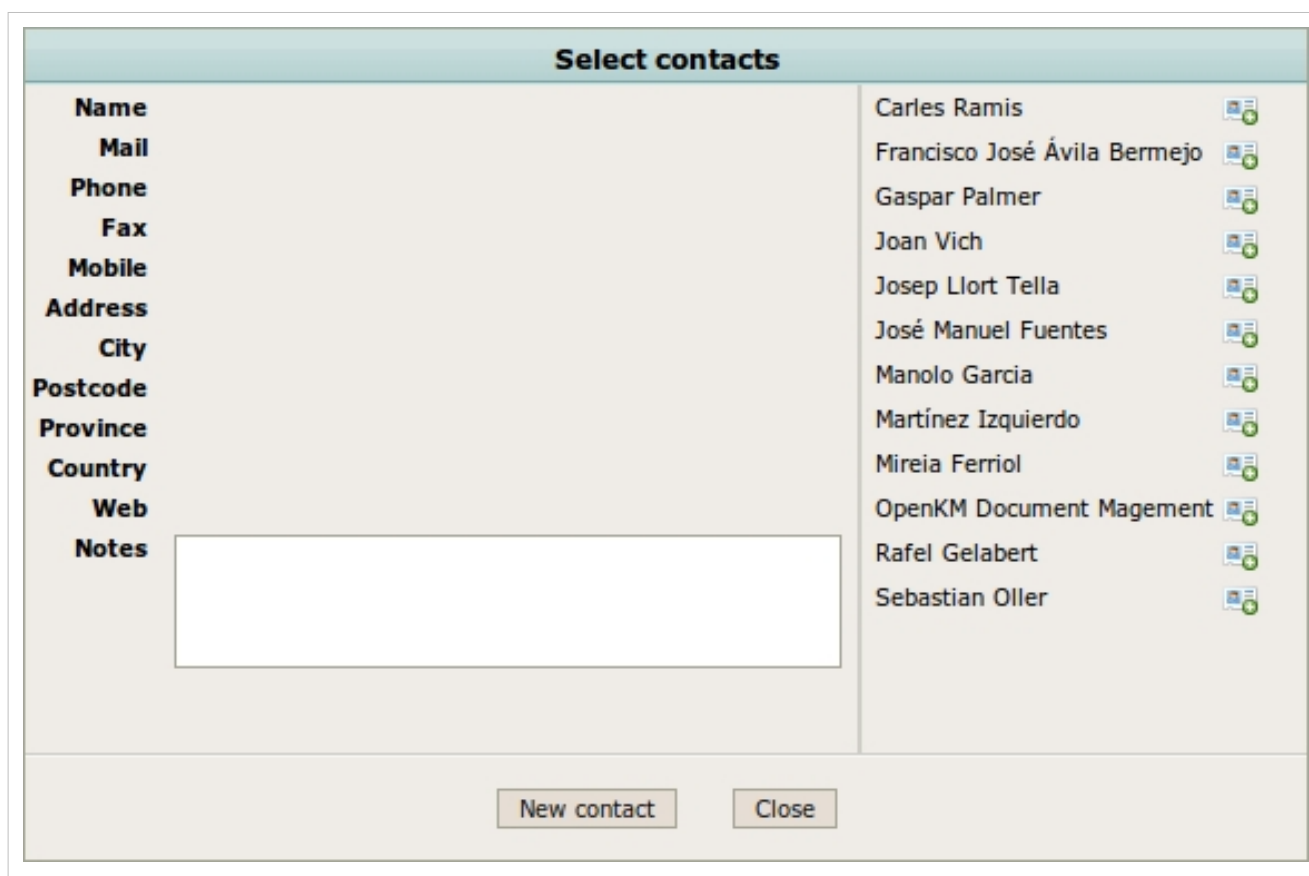
Manage contact from tab view

On tab document, folder or mail view can be managed contacts. Assign a contact to some document, folder or mail, delete or update contact field values. For all these operations write grants are needed on document, folder or mail.

To adding a new contact must be selected add button. It'll appearing a popup.

Can selecting on right list, some contact to be linked to document, folder or mail, making a click on **selecting contact icon** .

Making **double click** on tab contact list or clicking edit icon 📝 can edit the contact record (you must have write privileges on this view).

Making a click on delete icon ⊖ can delete the link between contact and document, folder or mail. It'll appearing a confirmation message. In the tab view the contact record really is not deleted, is only deleted the link between contact and document, folder or mail.
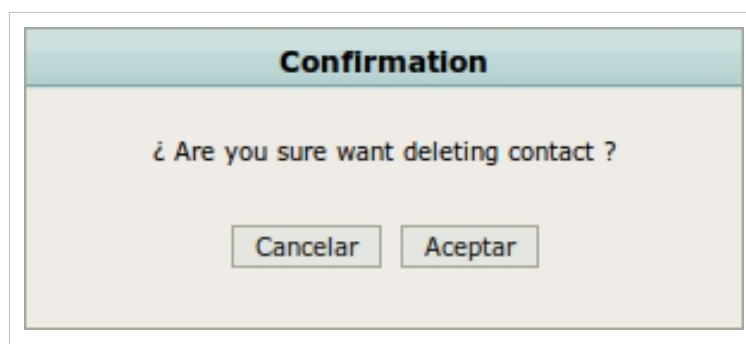
Activity log tab

Activity log tab allows to see document, folder or mail log.

Within can view all log options or some filtered relative to selected document, folder or mail. The **View get childs** options filter the get childs action, because that's one of the most common.

Google contacts synchronization
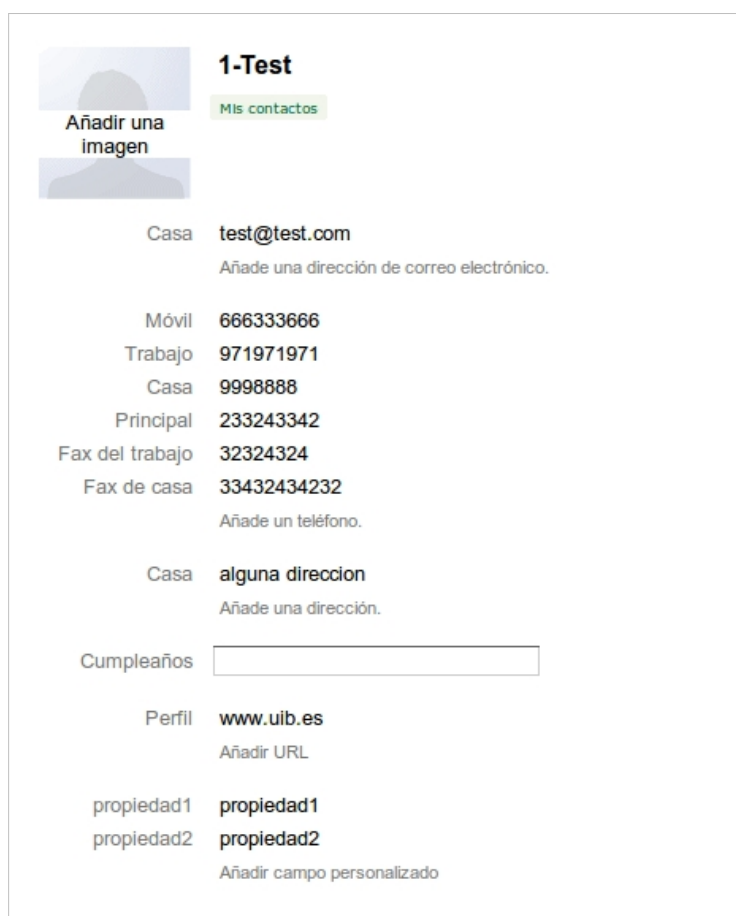
It allows to synchronize your Google contacts groups to OpenKM, import new contacts or update contacts information imported before.

Synchronizing

Go to **tools** menu, select the menu **Contacts** and the sub menu **Google Contacts Synchronization** it'll appearing Google Contacts Synchronization Popup. Put your **username** and **password** and then **login**.

If you've got custom fields defined on Google Contacts you can mapping to OpenKM (for example on the screenshot the custom fields are called propiedad1 and propiedad2).

Set the custom fields, if you've got defined some one, select the contact group you want to import and the list them.
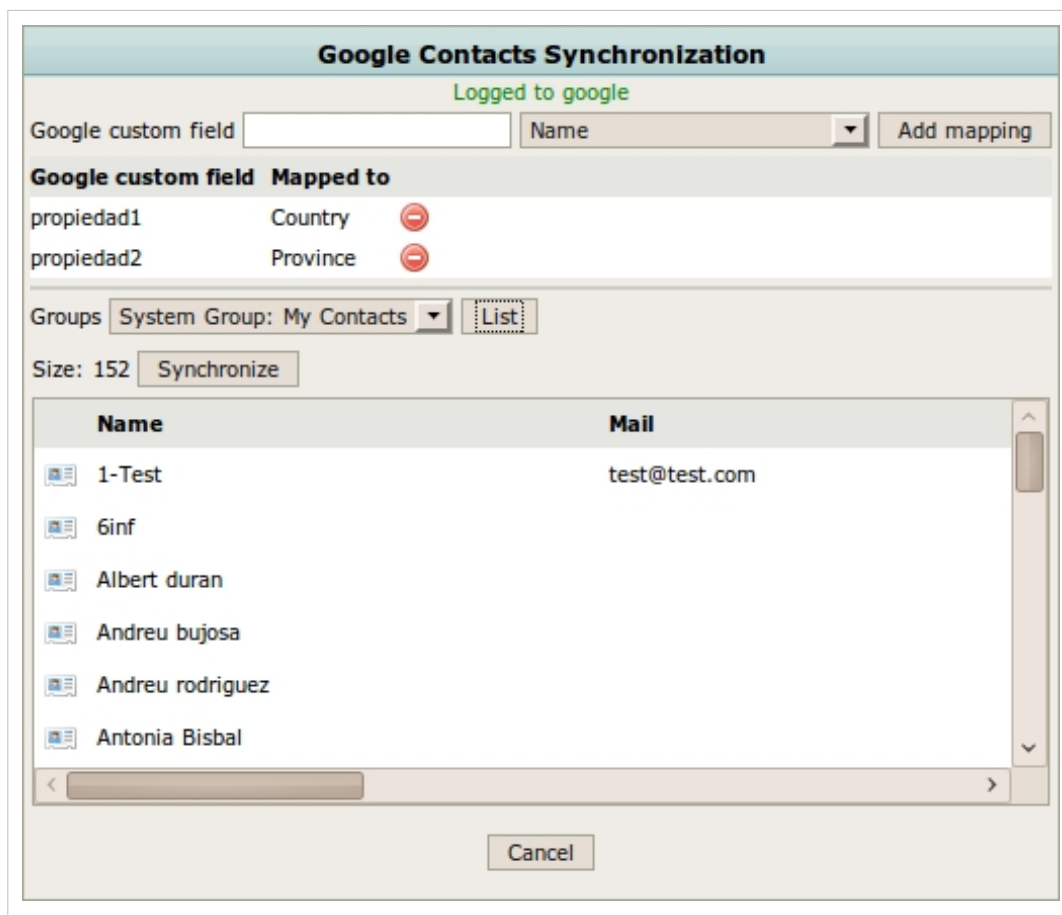
Take a look the mapping has been executed right. If all it's right, then you can synchronize contacts. Note if contacts yet has been imported before in the OpenKM it'll be update within actual Google values, if not it'll be inserted into OpenKM. After finishing synchronization it'll appear at top some message indicating the operation has been completed successfully.

Forum

Forum allows creating document, folder or mail discussion topics or create general purpose forums.

In Desktop view can see new tab called forum where users can make discussions about documents, folders or mails in several topics. Also in Dashboard view can accessing to general purpose forums.
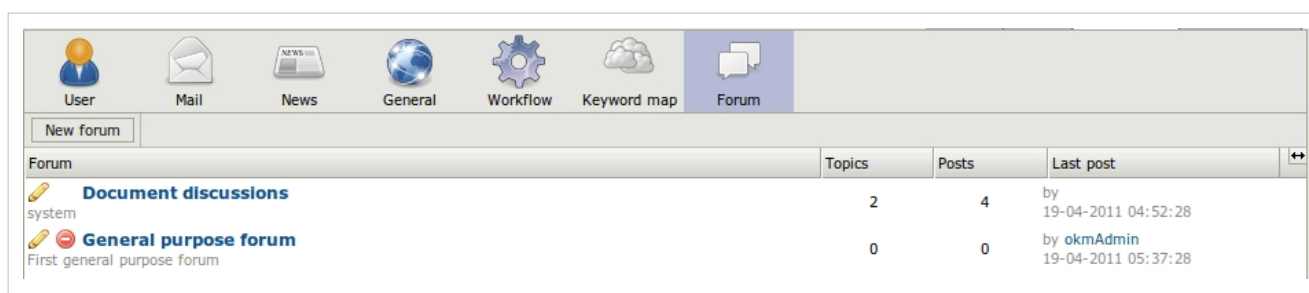
Retrictions

- Only users with administration grants can create, update or delete forum.
- Only users with administration grants can see document discussions forum in dashboard view.
- Nobody can delete document discussions forum (document / folder / mail discussion).

Description of different icon options

- 🖉 → Edit forum / topic / contact
- ⊖ → Delete forum / topic / contact

Forum editor features

- B - Bold
- *I* - Italic
- U - Underline
- p - Paragrap
- Quote - Make a quotation
- Img - Add image url.
- Email - Add e-mail.

- h1 to h6 - Header settings.
- Align Left, center, justify and right.
- Text size.
- Font color palette.
- Smilies
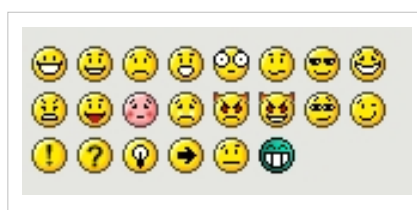
Create new topic

If you're on Desktop view, select the tab forum, and press the button **create new topic**

Then will appearing the post form. Fill the fields.

Press the button **create** and will be forwarded to topic view will all post.

Create a reply

Enter into some topic, and at the top press the button **post reply**.

You can also press button **Quote** in that view to reply some post

Then will appearing the post form.Fill the fields.

Press the button **create** and will be forwarded to topic view will all post.

Update a post
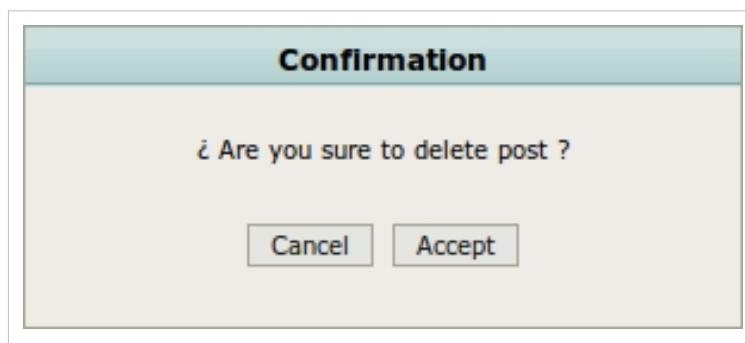
Enter into some topic, and press some post edit icon ✏. Will appearing the update post form.

Press the button **Update** and the post will be updated.

Delete a post

Enter into some topic, and press some post delete icon ⛔ . Will appearing a confirmation message.
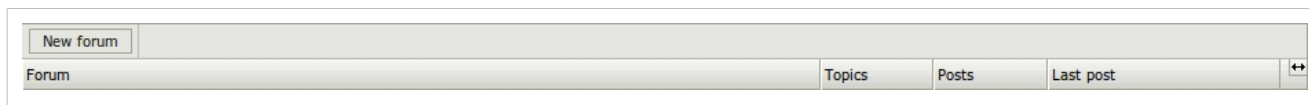
Press the button **Accept** and the post will be deleted.

Topic features

- To delete a topic, must delete all posts.
- Renaming first post will be renamed the topic.

Create a forum

In dashboard view, press the button **New forum**.

I'll will appearing the forum form.

Press the button **Create**, will be forwarded to forum view.

There can be created new topics.

Update a forum

In dashboard view, press some forum edit icon 🖊 . Will appearing the update forum form.

Press the button **Update** and the forum will be updated.

Delete a forum

In dashboard view, and press some forum delete icon ⊖ . Will appearing a confirmation message.
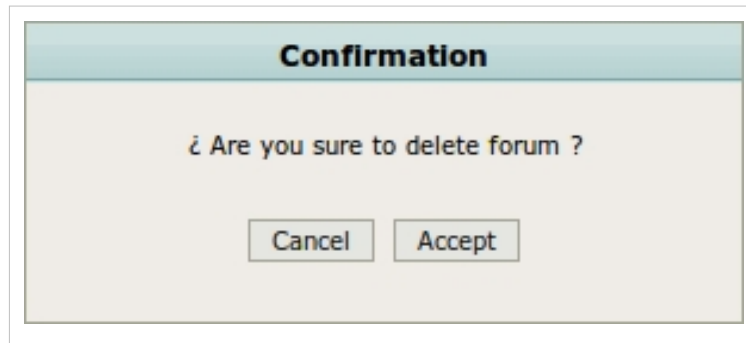
Press the button **Accept** and the forum will be deleted.

Wiki

Wiki allows fast creation an dediting any number of interlinked wiki pages and OpenKM documents and folders. Multiple users can collaborate on it, creating, updating or deleting wiki information.

Each document, folder and mail can have their own wiki. On Dashboard there's a general purpose wiki for all OpenKM, where can be created new wiki pages linked with documents, folders among others.

Wiki editor features

- B - Bold
- *I* - Italic
- U - Underline
- p - Paragrap
- Quote - Make a quotation
- Img - Add image url.
- Email - Add e-mail.
- h1 to h6 - Header settings.
- Align Left, center, justify and right.
- Text size.
- Font color palette.
- Smilies
- Document link
- Folder link
- New wiki page
- Wiki page link

Create new wiki page

If you're on Desktop view, select the tab wiki, and press the button **create**

Then will appearing the wiki editor. Fill the content.

Press the button **create** and will be forwarded to wiki view.

Update wiki page

If you're on Desktop view, select the tab wiki, and press the button **update**

Then will appearing the wiki editor. Update the content.

Press the button **update** and will be forwarded to wiki view.

History wiki page

If you're on Desktop view, select the tab wiki, and press the button **history**

Then will apearing history wiki page.

From this view you can view older wiki page or restore older.

Delete wiki page

If you're on Desktop view, select the tab wiki, and press the button **delete**

Then will appearing confimation popup.
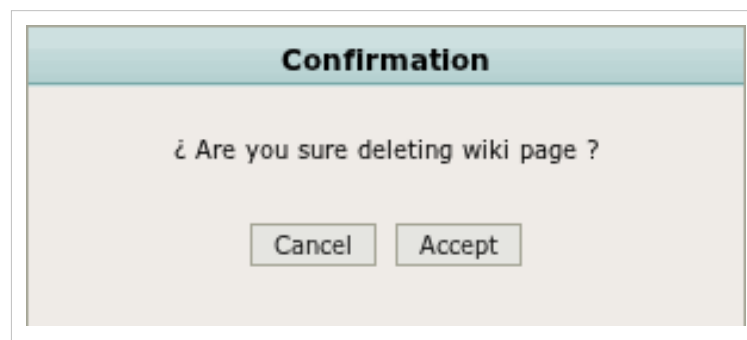
If you press the button **accept**, the wiki page will be deleted (database marked as deleted). To restore simply create new page called with same name and go to history. Deleted wiki page can be deleted from there.
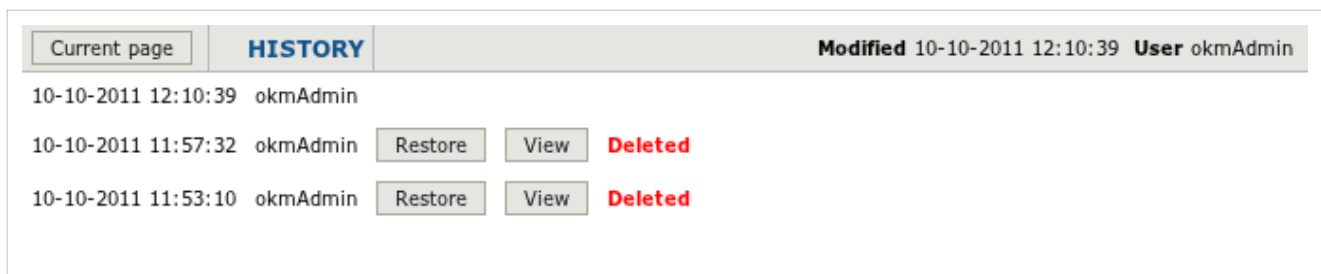
Unlock wiki page

Wiki pages are updated by only one user at same time. Meanwhile are updated by this user nobody can change it. User who has lock the wiki page can directly unlock it pressing button **unlock** (normally if users from edition view has pressed cancel or update the wiki page will return to be unlocked).
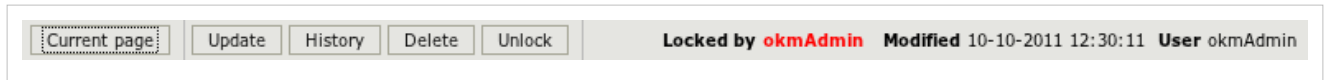
Inserting document link

From update wiki editor view select the icon document find. Will appearing a document finder popup.
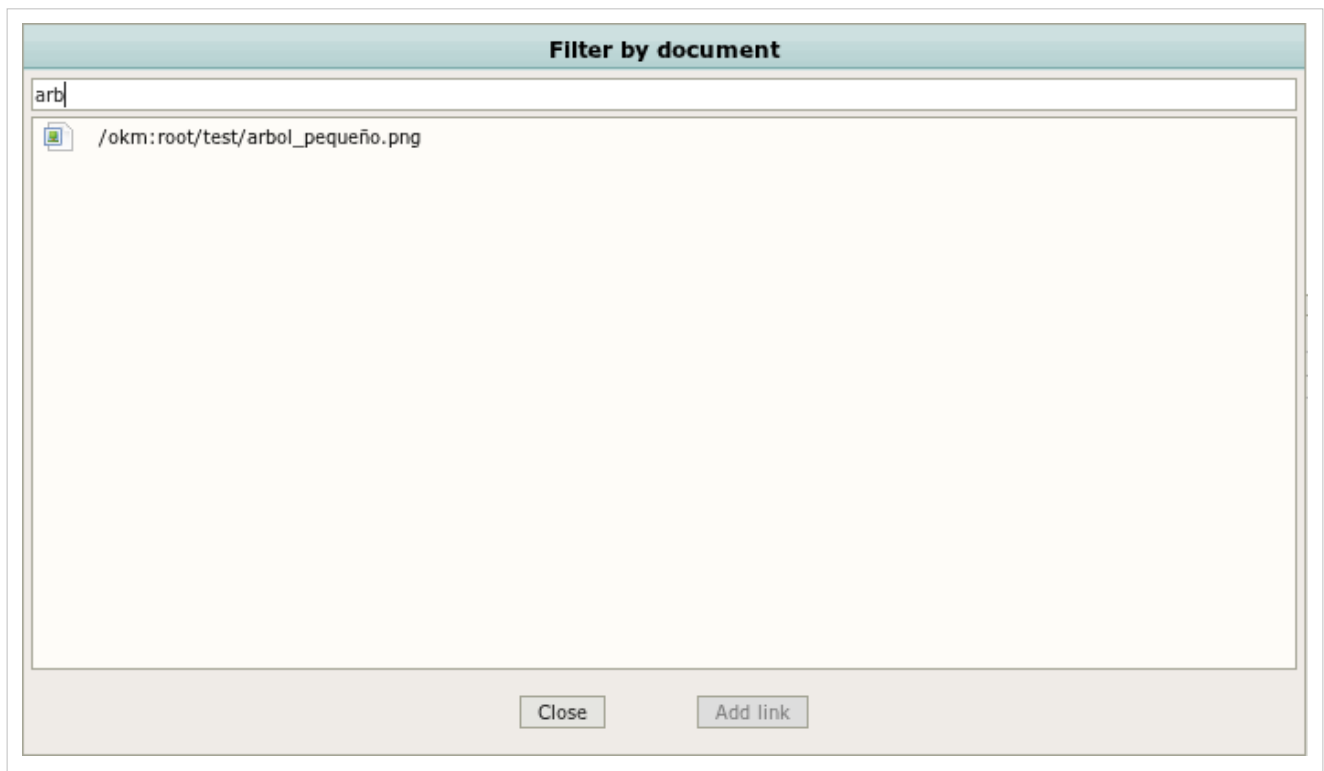
Select the document you want to link and press the button **Add link**.

Inserting folder link

From update wiki editor view select the icon ![folder find] folder find. Will appearing a folder finder popup.

| **B** | *I* | <u>U</u> | p | Quote | Img | URL | Email | h1 | h2 | h3 | h4 | h5 | h6 | ≡ | ≡ | ≡ | ≡ | Normal ▾ | Show color | 🔳 | 🔳 | 🔲 | 🔳 |

Filter by folder

tes

📂 /okm:root/test

Close   Add link
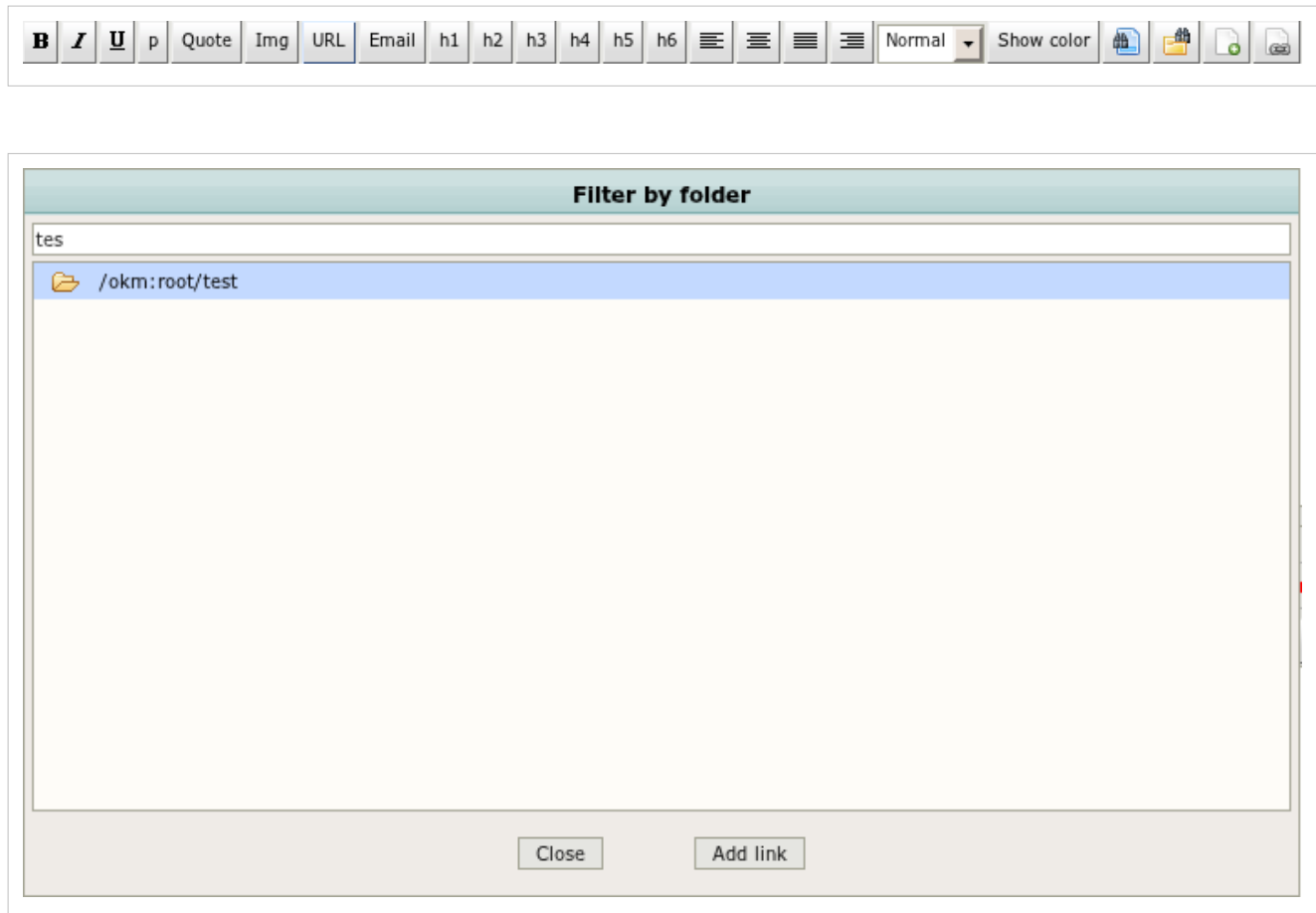
Select the document you want to link and press the button **Add link**.

Insert new wiki page link

From update wiki editor view select the icon ![new wiki page] new wiki page. Will appearing a popup.

| **B** | *I* | <u>U</u> | p | Quote | Img | URL | Email | h1 | h2 | h3 | h4 | h5 | h6 | ≡ | ≡ | ≡ | ≡ | Normal ▾ | Show color | 🔳 | 🔳 | 🔲 | 🔳 |

Add page

Title new wiki page

Close   Add
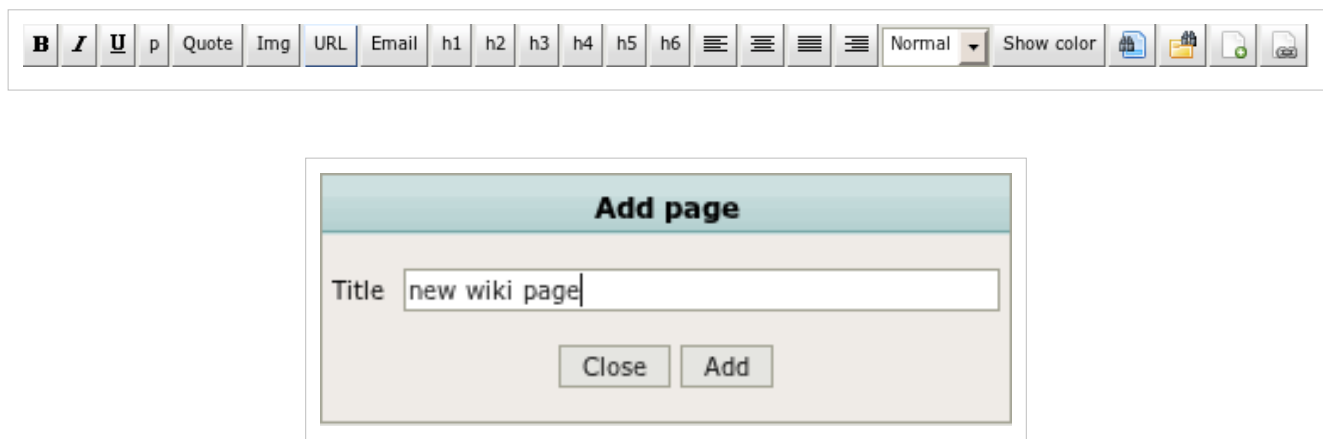
Typewrite the new wiki page title (if exist will not replace existing wiki page) and then press button **Add**.

Insert existing wiki page link

From update wiki editor view select the icon ![icon] wiki page. Will appearing a wiki page finder popup.

Select the wiki page, and then press the button **Add link**.

General wiki

In dashboard view there's a general purpose wiki. The main wiki page - called index - can not be deleted. This view includes a navigators buttons with wiki page history clicked by users.
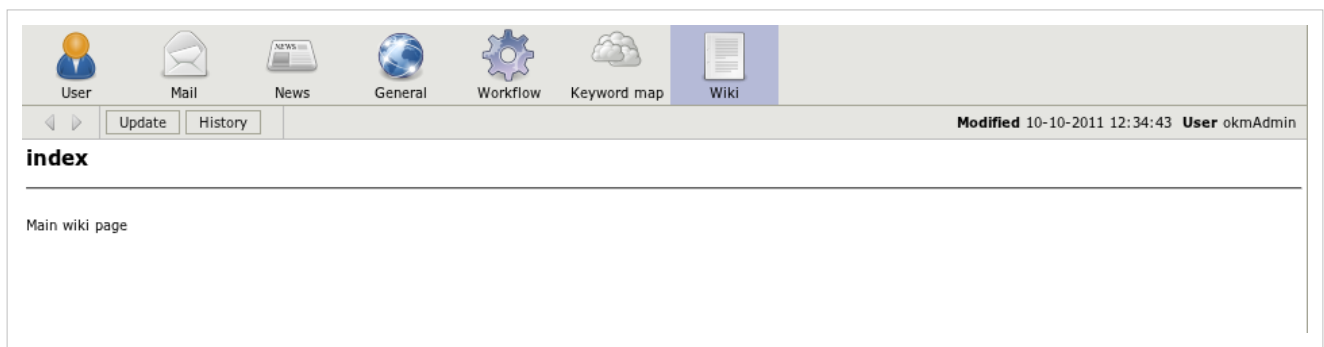
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Cancel edit *Source*: http://wiki.openkm.com/index.php?oldid=2597 *Contributors*: Jllort, Pavila

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