

OpenKM

User Guide

Contents

Articles

User Guide	1
System access	4
Desktop screen	5
Menu bar	6
Toolbar	7
User identification	8
Status bar	8
Workspace	8
Path	9
Taxonomy	9
Document browser	10
Properties panel	12
Basic operations with documents and folders	13
Create folder	14
Find folder	14
Inserting documents	15
Wizard	17
Renaming	19
Move	20
Copy	21
Adding bookmark	22
Set home	23
Deleting	23
Keyword shortcuts	24
Uploading from desktop computer	25
Application splitters resize	25
Document edit	26
Cancel edit	26
Update a file	27
Lock	29
Unlock	29
Downloading a document	30
Adding a metadata to a document	30
Deleting a metadata from a document	31

Adding keywords	31
Adding categories	32
Copy to clipboard	34
Send document as attachment	34
Fast select and unselect	35
Massive delete	36
Massive move	37
Massive copy	38
Massive add note	39
Massive add category	40
Massive add keyword	41
Massive property group	43
Extra columns	44
Pagination	45
Categories	46
Metadata view	47
Thesaurus view	49
My documents	50
Templates	51
E-mail	56
Trash	57
Using information	58
Security	58
Search	58
Dashboard	59
Notification service	60
Subscription service	60
Starting a Workflow	61
Workflow pending task	61
User configuration	62
Languages	63
Appearance	63
Using iPhone or Android	64
Help	66
Microsoft Office Addin	67
Outlook addin	68
Word Addin	71
Excel Addin	75

PowerPoint Addin	79
OpenOffice.org Add-on	83
Stapling	87
Autocad preview	88
Messaging	93
Downloading restricted buttons	103
Stamp	105
Digital signature	109
Document encryption	113
Contacts	121
Activity log tab	126
Google contacts synchronization	127
Forum	129
Wiki	134
Zoho	141
Google docs	143
Document expiration	147
Macros	149
Live Edit	150
Merge files	152
OpenMeetings	153

References

Article Sources and Contributors	158
Image Sources, Licenses and Contributors	160

User Guide

OpenKM is a tool to manage documents generated within a company, to improve access within the whole corporate environment and to endeavor 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.

- System access
 - User interface
 - Desktop screen
 - Menu bar
 - Toolbar
 - User identification
 - Status bar
 - Workspace
 - Path
 - Taxonomy (folder tree)
 - Document browser
 - Properties panel
 - Basic operations with documents and folders
 - Create folder
 - Find folder
 - Find document
 - Find similar documents
 - Inserting documents
 - Wizard
 - Renaming
 - Move
 - Copy
 - Adding bookmark
 - Set home
 - Deleting
 - Keyword shortcuts
 - Uploading from desktop computer
-

- Application splitters resize
 - Specific operations with documents
 - Document edit (check-out)
 - Cancel edit (cancel check-out)
 - Update a file (check-in)
 - Lock
 - Unlock
 - Downloading a document
 - Adding a metadata to a document (property group)
 - Deleting a metadata from a document (property group)
 - Adding keywords
 - Adding categories
 - Copy to clipboard
 - Send document as attachment
 - Massive operations with several documents, folders and mails
 - Fast select and unselect
 - Massive delete
 - Massive move
 - Massive copy
 - Massive add note
 - Massive add category
 - Massive add keyword
 - Massive property group
 - Extra columns
 - Pagination
 - Categories
 - Metadata view
 - Thesaurus view
 - My documents
 - Templates
 - E-mail
 - Trash
 - Using information
 - Security
 - Search
 - Fast search
 - 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
 - Notification service
 - Subscription service
 - Starting a Workflow
-

- Workflow pending task
 - User configuration
 - System tools
 - Languages
 - Appearance
 - Using iPhone or Android
 - Help
 - Microsoft Office Addin
 - Outlook addin
 - Word Addin
 - Excel Addin
 - PowerPoint Addin
 - OpenOffice.org Add-on
 - Community extension
 - Macros
 - Downloading restricted buttons
 - Professional extensions
 - Stapling
 - Autocad preview
 - Messaging
 - Stamp Image or Text Watermark
 - Digital signature
 - Cryptography
 - Contacts
 - Activity log tab
 - Google contacts synchronization
 - Forum
 - Wiki
 - Zoho
 - Google docs
 - Document expiration
 - Merge files
 - Live Edit
 - OpenMeetings
-

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.



The image shows the OpenKM login interface. At the top is the OpenKM logo with the text 'Knowledge Management' below it. On the left, there is a computer icon with a padlock and the text: 'Welcome to OpenKM !' and 'Use a valid user and password to access to OpenKM user Desktop.' On the right, there is a login form with three fields: 'User' (text input), 'Password' (text input), and 'Language' (a dropdown menu currently showing 'Español'). A 'Login' button is located to the right of the language dropdown.

Up to version 4

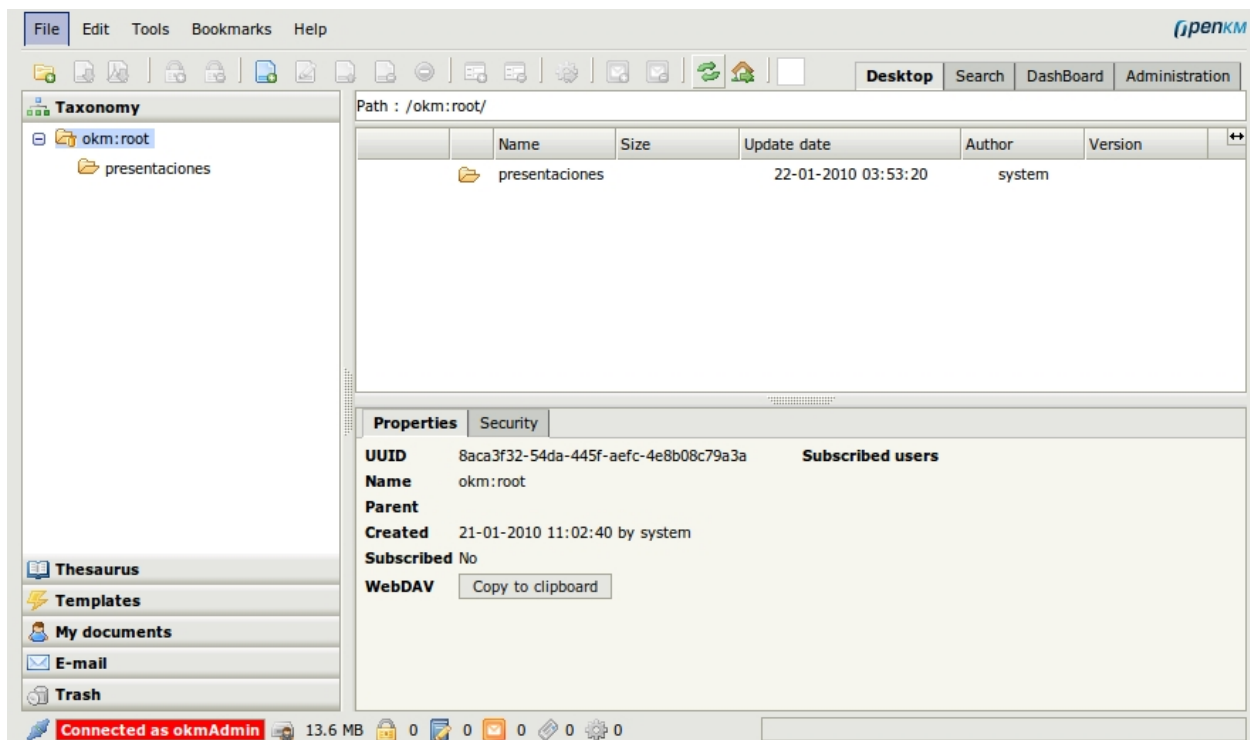
Language can not be selected.



This image shows the OpenKM login interface for versions up to 4. It features the same logo and welcome message as the previous version. However, the login form on the right only contains 'User' and 'Password' text input fields, and a 'Login' button. The 'Language' dropdown menu is absent, indicating that language selection is no longer available in this version.

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.

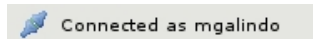


Detail of the functions according to their icons:

-  → 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 who is connected in this session is identified.



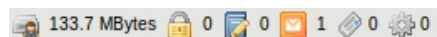
In the event of detecting a user with **AdminRole** as the user, the identifier will appear in another colour, with the purpose of indicating that operations are being carried out under a “super-user” without any restrictions on document access.

Changes from version 3.0 to 4.0

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

Status bar

In this space of the desktop screen the user has 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 items pending to read and number of workflow task pending that have been assigned to the user.

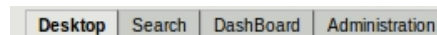


At the right corner, there's a status message bar that OpenKM uses to show some information to users.



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 access.

Changes from version 3.0 to 4.0

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









Path

The path always 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

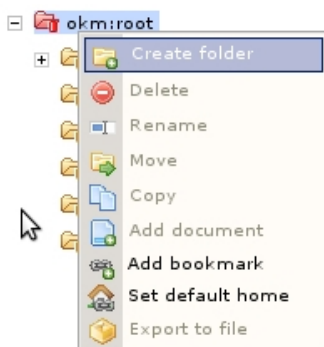
Firstly, on the left of the desktop, is the Folder Tree, also called the Taxonomy. It displays a view of the repository grouped by folders. There are various types of folders symbolised by the following icons:

-  → 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 location 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 of the screen 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 to open the folder.
- Double-click with the left button on a document to download the document.
- Right-click 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

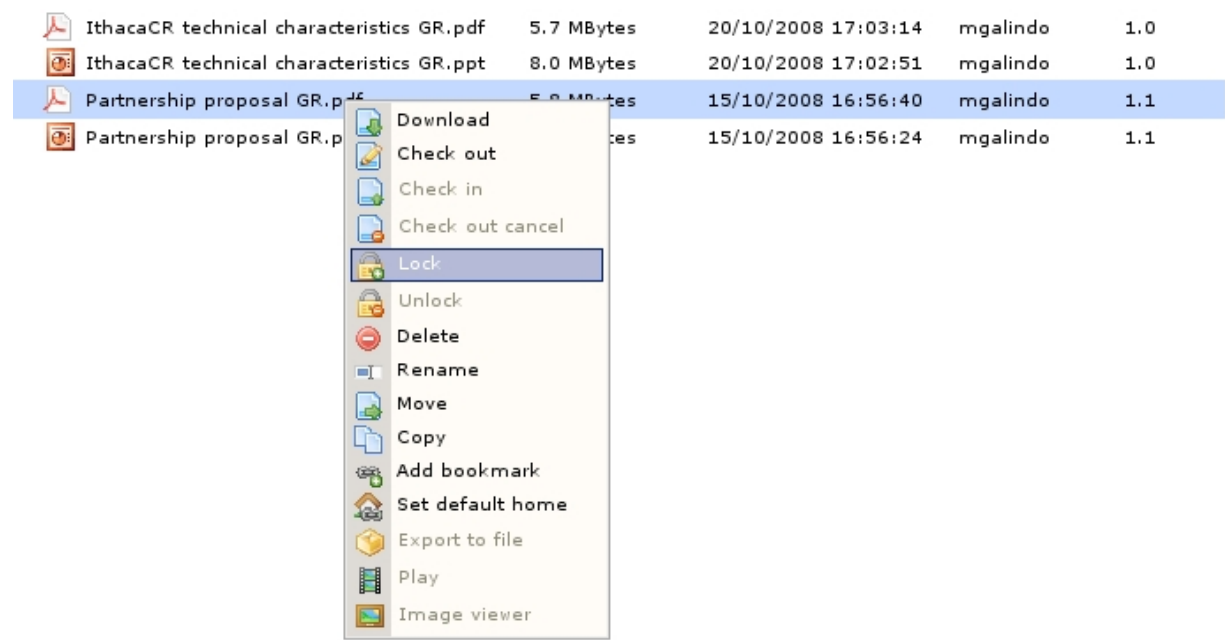
	Folletos		21-07-2010 07:14:19	okmAdmin	
		Download	789.0 KB	21-07-2010 07:14:30	okmAdmin 1.0
		Check out	8.4 MB	21-07-2010 07:14:26	okmAdmin 1.0
		Check in	8.5 MB	21-07-2010 07:14:29	okmAdmin 1.0
		Check out cancel	3.8 MB	21-07-2010 07:14:12	okmAdmin 1.0
		Lock	5.9 MB	21-07-2010 07:14:19	okmAdmin 1.0
		Unlock	5.7 MB	21-07-2010 07:14:18	okmAdmin 1.0
		Delete	8.0 MB	21-07-2010 07:14:25	okmAdmin 1.0
		Rename	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

Previewing of images and videos is done in separate popup windows. From version 5.x and above, 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 of the screen are detailed the Document or folder properties with security, history, general properties and specifics concerning documents defined by users (document parameterization).




Options available for folders

- Security tab.
- Properties tab.

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

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				Subscribed users
Name	text_file.txt				Keywords cloud
Folder	/okm:root				marketing test
Size	43 Bytes				
Created	10-06-2010 08:46:17 by okmAdmin				Categories 
Modified	10-06-2010 08:46:17 by okmAdmin				
MIME type	text/plain				
Keywords	<input type="text"/>				
	marketing 				
	test 				
Status	Available				
Subscribed	No				
History size	43 Bytes				
URL	<input type="text"/>				
WebDAV	<input type="text"/>				

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 a knowledge tree via which the company 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. This is only a special way to view the repository, but really the repository is organized physically as you can see in the 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 a knowledge tree via which the company 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. This is only a special way to view the repository, but really the repository is organized physically as you can see in the 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 users themselves.


Templates

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

E-mail

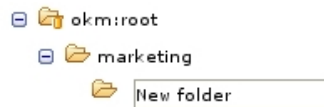
Contains imported personal emails, text and attached documents from the user's mail account using the IMAP mail service.

Create folder

Operation icon: 


Available

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



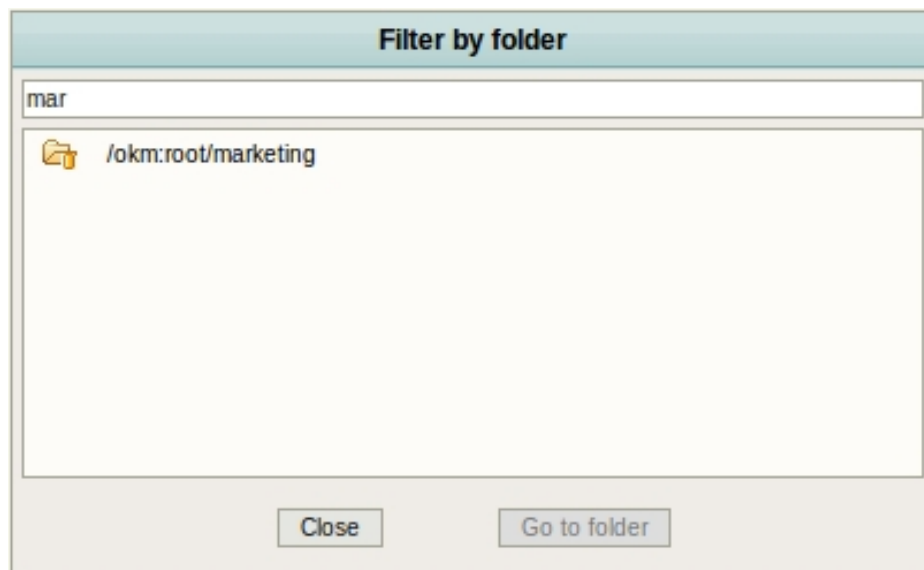
Find folder

Allows to quickly find folders.


Operation icon: 

Available

- Toolbar.
- Menu file

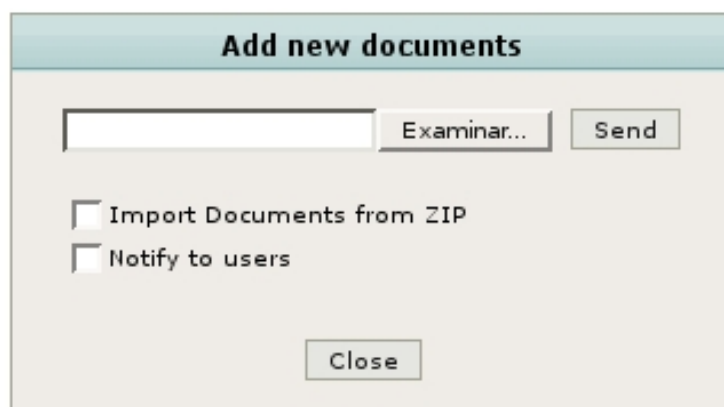


Inserting documents

Operation icon: 

Available

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

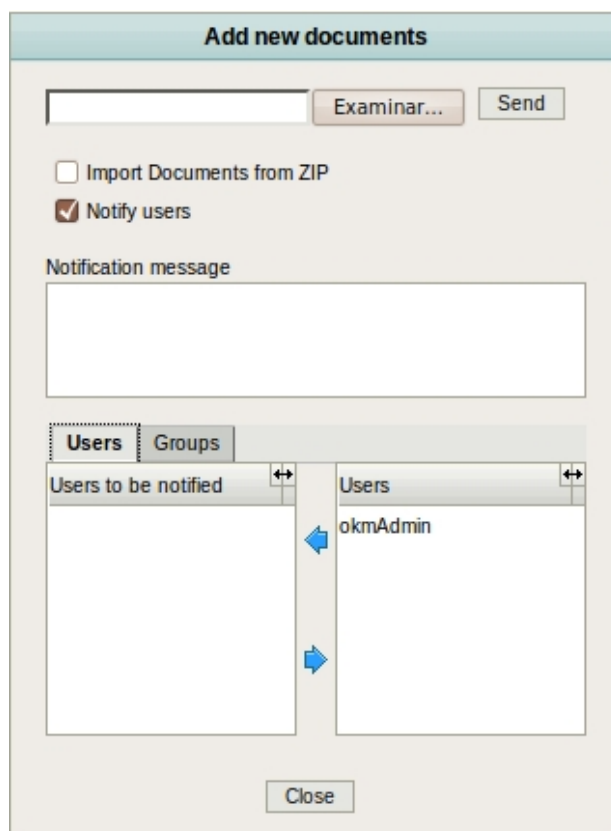


Add new documents

☐ Import Documents from ZIP

☐ Notify to users

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 unchecked. You can notify to users or groups.



Add new documents

☐ Import Documents from ZIP

☒ Notify users

Notification message

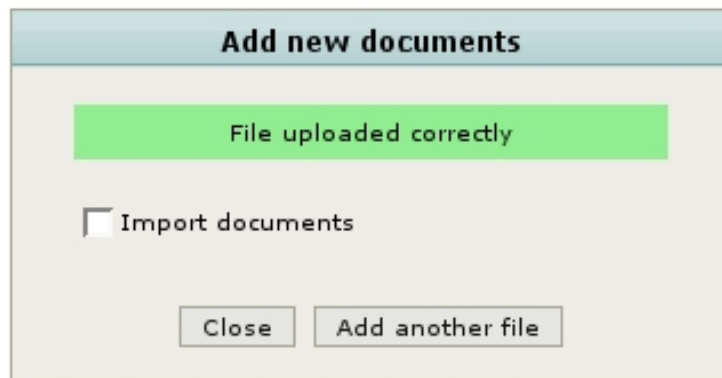
Users **Groups**

Users to be notified

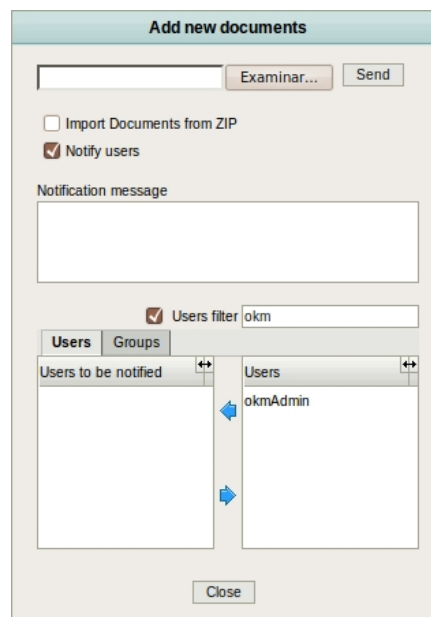
Users

okmAdmin

To end, click "Send". Once the upload of the new document has finished, you can upload more documents with the option "Add another file".



For large organizations with many users, advanced filtering can be enabled using the Profiles administration feature. It allows one to filter users and groups.



Up to version 4 and above

Does not have advanced filters and sending to groups.

Add new documents

Examinar... **Send**

☐ Import Documents from ZIP
☒ Notify to users

Notification message

Users be notified ↔ **Users** ↔

admin
gsoler
jllort
pavila

Close

Wizard

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

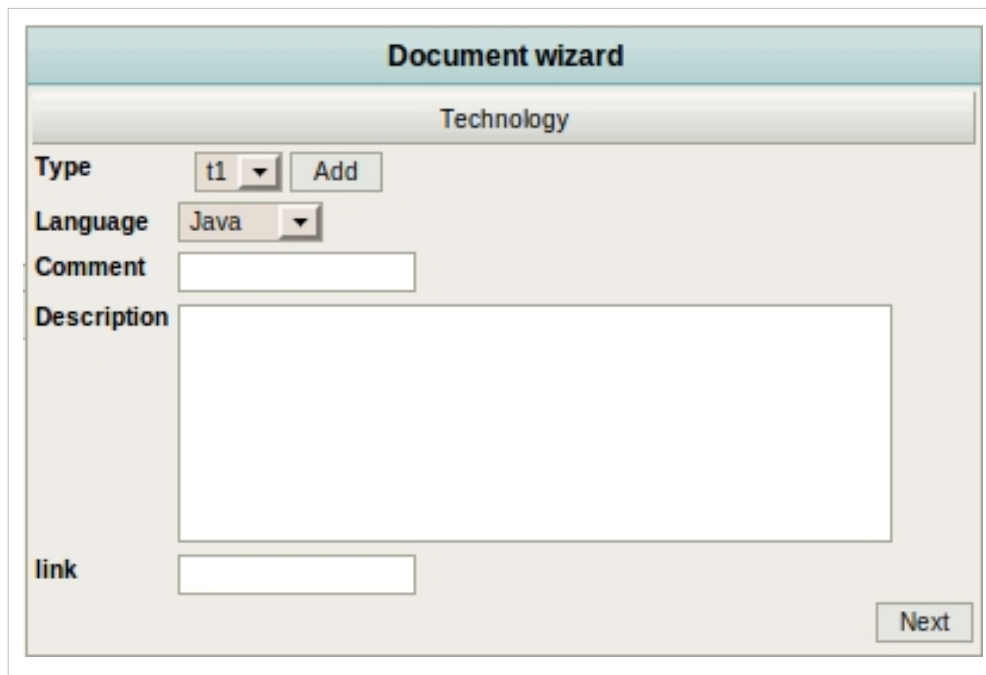
Add new documents

Examinar... **Send**

☐ Import Documents from ZIP
☐ Notify to users

Close

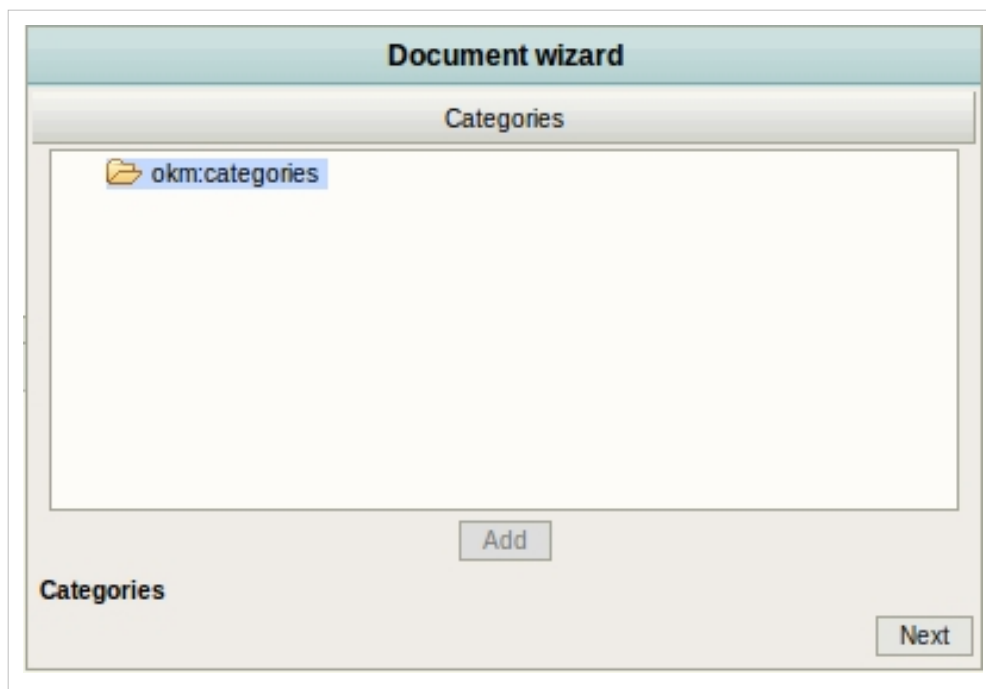
Property groups (metadata)



The 'Document wizard' window is in the 'Technology' step. It features a title bar with the text 'Document wizard'. Below the title bar is a tab labeled 'Technology'. The main area contains the following fields and controls:

- Type:** A dropdown menu showing 't1' and an 'Add' button.
- Language:** A dropdown menu showing 'Java'.
- Comment:** A single-line text input field.
- Description:** A large multi-line text input area.
- link:** A single-line text input field.
- Next:** A button located at the bottom right of the window.

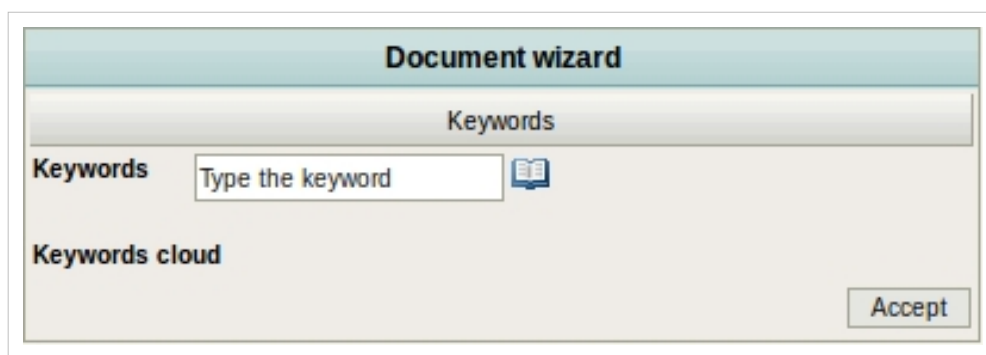
Categories



The 'Document wizard' window is in the 'Categories' step. It features a title bar with the text 'Document wizard'. Below the title bar is a tab labeled 'Categories'. The main area contains the following elements:

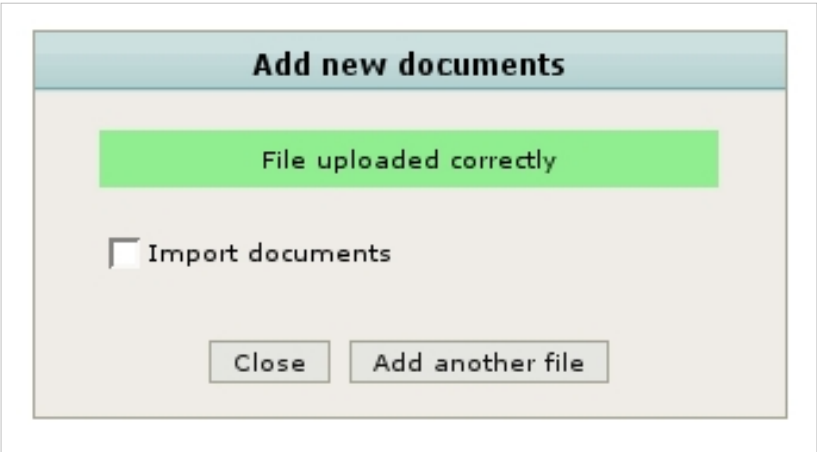
- A list box showing a folder icon and the text 'okm:categories'.
- An 'Add' button located below the list box.
- Categories:** A label positioned at the bottom left of the main area.
- Next:** A button located at the bottom right of the window.

Keywords




The 'Document wizard' window is in the 'Keywords' step. It features a title bar with the text 'Document wizard'. Below the title bar is a tab labeled 'Keywords'. The main area contains the following elements:

- Keywords:** A label followed by a text input field containing the placeholder text 'Type the keyword' and a book icon.
- Keywords cloud:** A label positioned below the 'Keywords' field.
- Accept:** A button located at the bottom right of the window.



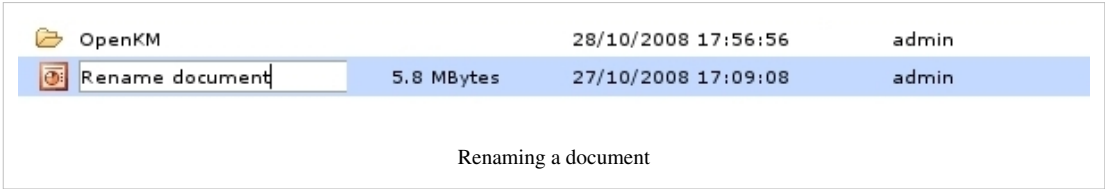
Renaming

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.



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.



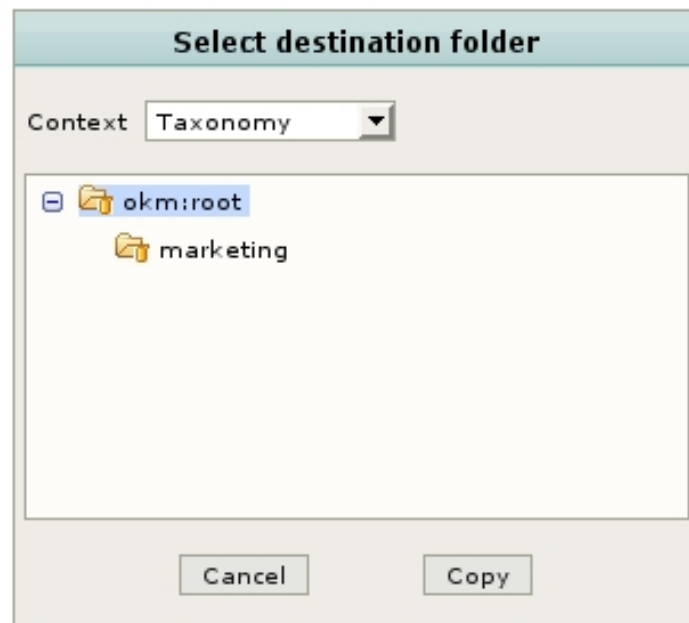
Copy

Operation icon: 


Available

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

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



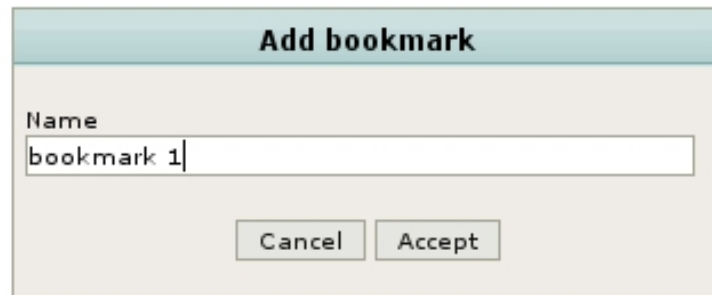
Adding bookmark

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.




A dialog box titled "Add bookmark" with a light blue header. Inside, there is a text input field labeled "Name" containing the text "bookmark 1". Below the input field are two buttons: "Cancel" and "Accept".

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: 

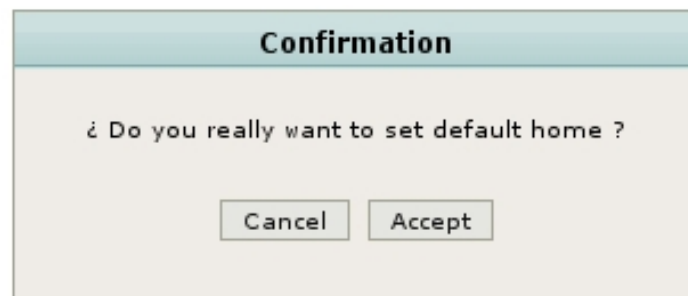
Available

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


You can set any folder or document as the 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.



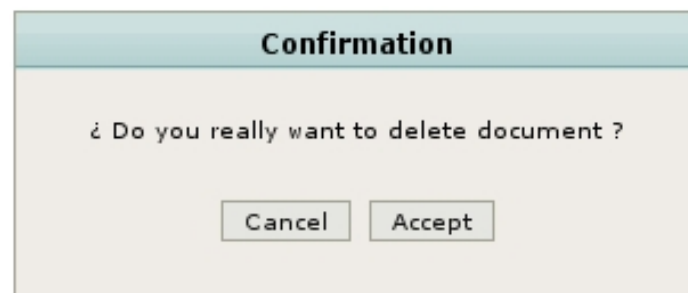
Deleting

Operation icon: 

Available

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

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



Keyword shortcuts

There are some keyboard shortcuts that you can use with OpenKM.

On folders, documents and mails

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


Others

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

Version 5.0.3 and older

CTRL+Q	to exit OpenKM
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Uploading from desktop computer

Operation icon: 

Available


- Toolbar.
- File menu.

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 folders will be automatically uploaded to OpenKM, to your currently selected folder path.



To close the uploader, simply right-click on the OpenKM logo and select Exit in the popup menu that appears.

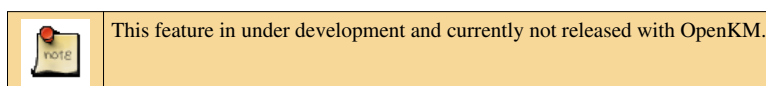
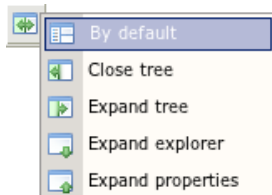
Application splitters resize

Operation icon: 

Available


- Toolbar.

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



This feature is under development and currently not released with OpenKM.

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: 

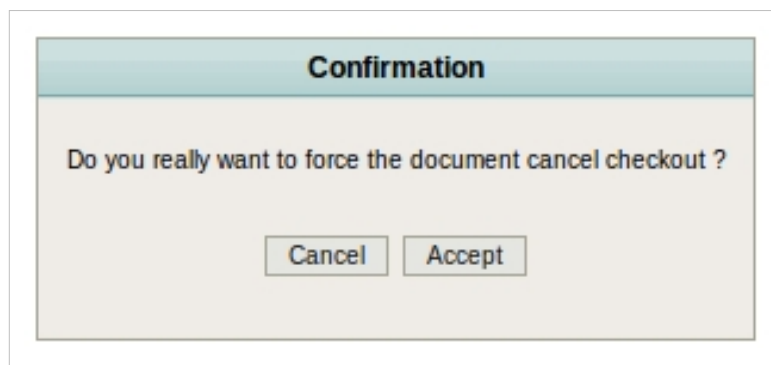
Available

- 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, the option to cancel document editing is available for any user with administrator rights, even though he may not be the user who started the editing. In this case, a confirmation popup will be shown to cancel the document edit.



Update a file

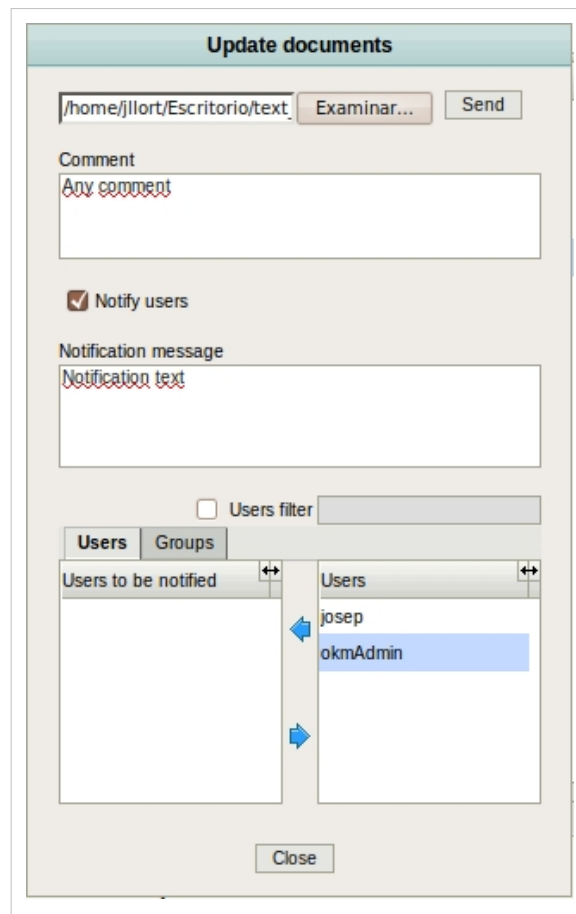
Operation icon: 

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 to the repository and notify you that it will replace the previous version with this newer one.



The dialog box titled "Update documents" contains the following elements:

- A text field with the path `/home/jllort/Escritorio/text`, an "Examinar..." button, and a "Send" button.
- A "Comment" section with a text area containing the placeholder text "Any comment".
- A checked checkbox labeled "Notify users".
- A "Notification message" section with a text area containing the placeholder text "Notification text".
- An unchecked checkbox labeled "Users filter" next to an empty text field.
- Two tabs: "Users" (selected) and "Groups".
- Below the "Users" tab, there are two list boxes:
 - A left list box labeled "Users to be notified" which is currently empty.
 - A right list box labeled "Users" containing the entries "josep" and "okmAdmin", with "okmAdmin" selected.
 - Blue arrows pointing in both directions between the two list boxes.
- A "Close" button at the bottom center.

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


You can send notification messages to user or groups. Additionally advanced filters can be enabled, useful for high level users, that can be enabled in user Profiles.

Up to version 4.x and earlier

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

The screenshot shows a dialog box titled "Update documents". At the top, there is a text field containing "entos/OpenKM/OpenKM.ppt", followed by a button labeled "Examinar..." and a "Send" button. Below this is a "Comment" section with a text field containing "Comments on the new version". Underneath is a checkbox labeled "Notify to users" which is checked. Below the checkbox is a "Notification message" section with a text field containing "Message to users to be notified". At the bottom, there are two list boxes. The left list box is titled "Users be notified" and contains the name "pavila". The right list box is titled "Users" and contains the names "admin", "gsoler", and "jllort". Blue arrows indicate a transfer of the selected user "pavila" from the left list to the right list. At the very bottom of the dialog is a "Close" button.




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: 

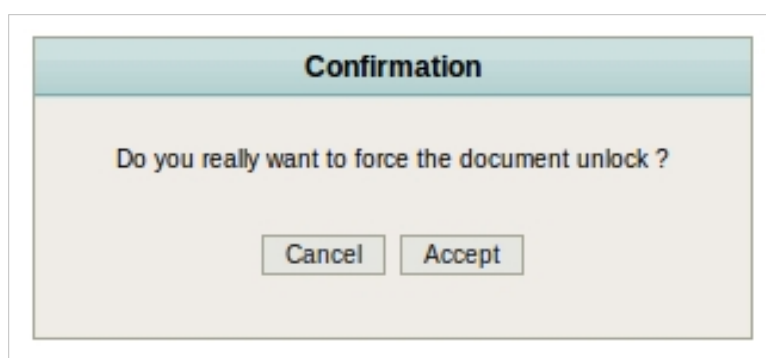
Available

- 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, the option to unlock a document is available for any user with administrator rights, although he may not be the user who locked the document. In this case, a confirmation popup will be shown before unlocking the document.



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

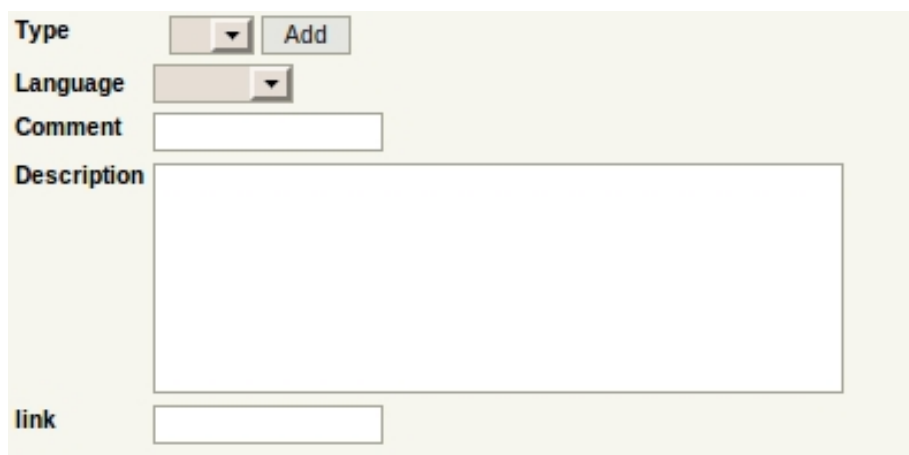
Property groups are groups of configurable parameters that can be configured each time the application is installed, which allow for the categorization of documents. These property groups can be Input, Simple List, Multiple Select List, Text area, Date, Link or OpenKM folder path. The values of these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



A dialog box titled "Add property group" with a light blue header. Inside, there is a dropdown menu labeled "Iniciativa" with a downward arrow. Below the dropdown are two buttons: "Close" and "Add".

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



A form for configuring a property group. It has a light yellow background. The fields are: "Type" with a dropdown and an "Add" button; "Language" with a dropdown; "Comment" with a text input field; "Description" with a large text area; and "link" with a text input field.

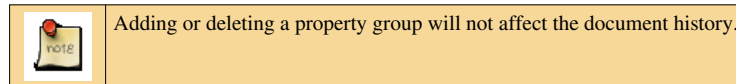
Once a property group has been assigned to a document, you can modify its values by selecting the option "Modify".

```

Type
Language  Java
Comment   some comment
Description some description
link      http://www.openkm.com

```

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



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. To add a keyword, type it and hit Enter.


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.

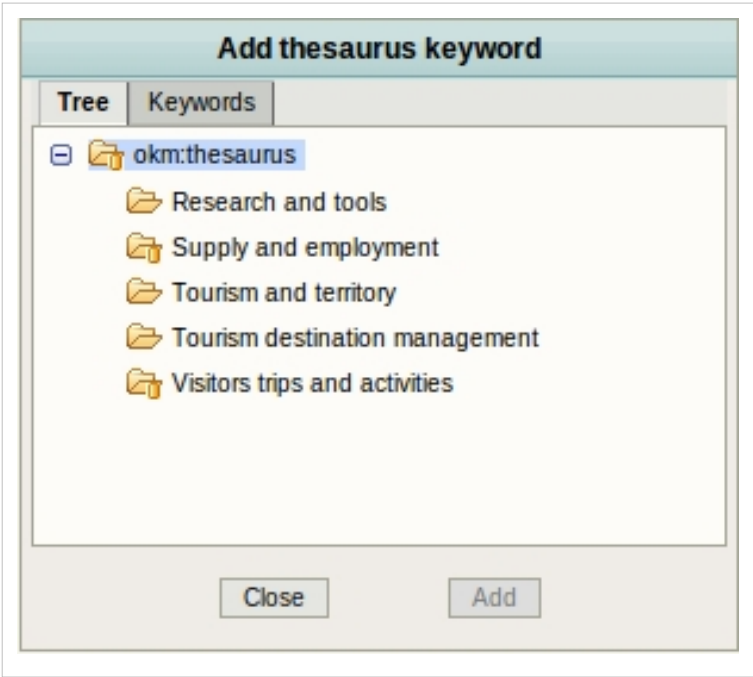
Although the document parameterization system by property groups is superior with regards to capacity, keywords will continue to be maintained and will not disappear, as it is understood that in certain installations property groups will not be created and it is useful that parameterization by default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

Adding or deleting keywords does not modify the document version.

Properties	Notes	Security	History	Preview	Technology
UUID	c98ef532-6b6a-4787-8708-10f3d3dc9ba9				Subscribed users
Name	text_file.txt				Keywords cloud test marketing
Folder	/okm:root				Categories
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				category 1/subcategory 1
Keywords	<input type="text" value="Type the keyword"/> <input type="button" value="test"/> <input type="button" value="marketing"/>				category 2
					category 2/subcategory 1
					category 2/subcategory 3
Status	Available				
Subscribed	No				
History size	43 Bytes				

Adding keywords from thesaurus

Keywords can be selected from the thesaurus. Click on the  thesaurus icon and a popup will appear with available thesaurus keywords.



Adding categories

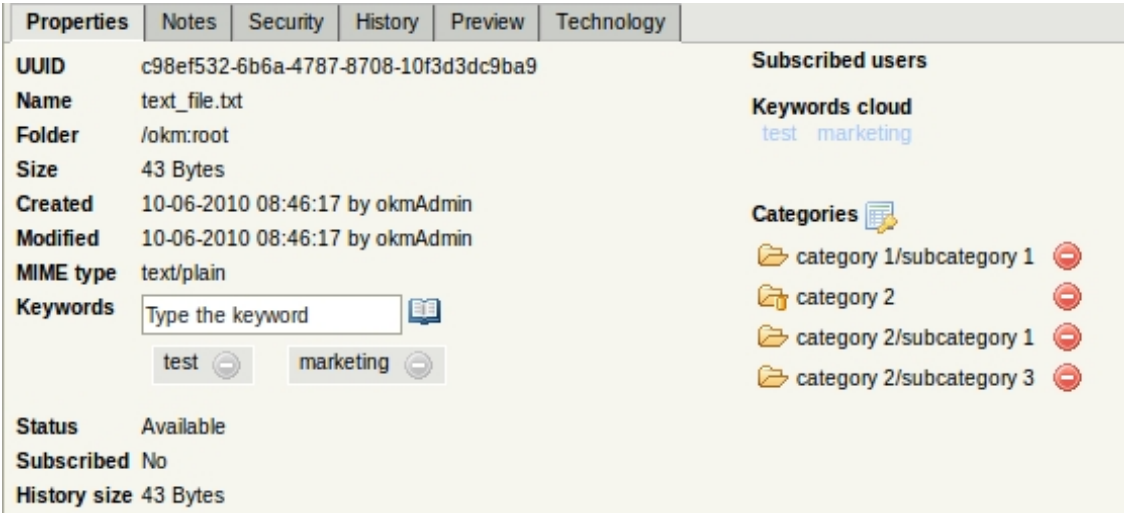
In the document properties tab of the properties panel, you can add and remove categories.

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 parameterization 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 parameterization by default categories is maintained.

Adding or deleting categories does not modify the document version.

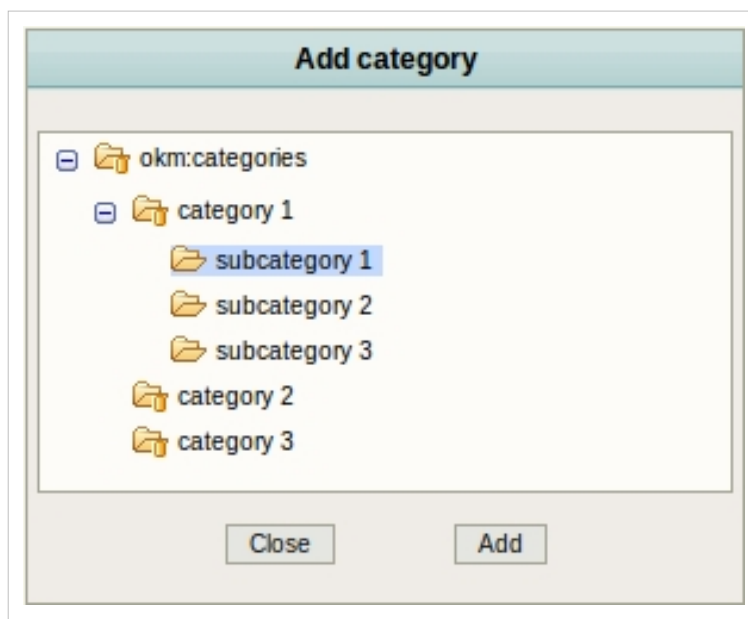
Categories are a hierachical folder structure of folder and subfolders.



Adding categories

Categories can be selected from the available categories folder structure.

Click on the  categories icon and a popup will appear with available categories.



Deleting categories

Click on the  delete icon of a category and it'll be deleted from the 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**.

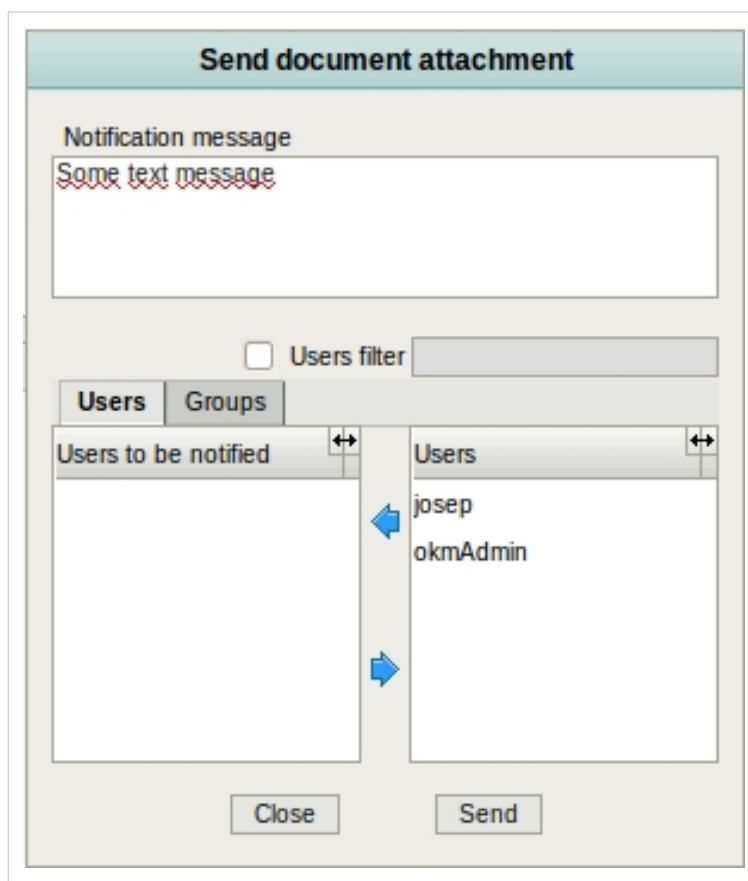
The list of preferences should open in browser window. Click right mouse button somewhere in active part of preference list window and choose New > Boolean option from context menu. Paste the following Preference name into the New boolean value window input box: **signed.applets.codebase_principal_support**.



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 a document to some OpenKM user as an email attachment, first select the document to send. Then open the File menu and select the option "send document attachment". A popup will appear in which the user or groups to send the document to can be selected.

A screenshot of a web-based dialog box titled "Send document attachment". The dialog has a light blue header bar. Below the header, there is a text area labeled "Notification message" containing the text "Some text message". Below this, there is a checkbox labeled "Users filter" which is currently unchecked. Underneath the checkbox are two tabs: "Users" (selected) and "Groups". Below the tabs are two list boxes. The left list box is labeled "Users to be notified" and is empty. The right list box is labeled "Users" and contains two entries: "josep" and "okmAdmin". Between the two list boxes are two blue arrows: a left-pointing arrow at the top and a right-pointing arrow at the bottom, indicating a selection mechanism. At the bottom of the dialog are two buttons: "Close" and "Send".

Fast select and unselect

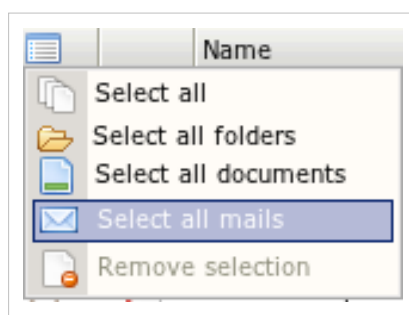
In filebrowser is available checkbox to select several documents, folders and mails and apply actions together.

		Name	Size	Update date	Author	Version
	<input type="checkbox"/>	OpenKM		05-07-2012 13:00:55	Administrator	
	<input type="checkbox"/>	presentaciones		05-07-2012 13:01:01	Administrator	
	<input type="checkbox"/>	proyectos		05-07-2012 13:01:10	Administrator	
	<input type="checkbox"/>	test2		06-07-2012 17:44:04	Administrator	
	<input type="checkbox"/>	document1.pdf	15.0 KB	12-07-2012 09:45:11	Administrator	1.0
	<input checked="" type="checkbox"/>	document2.pdf	15.7 KB	12-07-2012 09:45:25	Administrator	1.0
	<input type="checkbox"/>	document3.pdf	15.3 KB	12-07-2012 09:45:59	Administrator	1.0
	<input type="checkbox"/>	mail_项目后评价.txt	1.2 KB	05-07-2012 08:58:35	Administrator	1.4
	<input type="checkbox"/>	merged.pdf	44.6 KB	12-07-2012 17:13:51	Administrator	1.0

The icon  available in filebrowser open the fast select and unselect filebrowser rows.

The available options are:

- Select all rows
- Select all folder rows
- Select all document rows
- Select all mail rows
- Unselect all rows

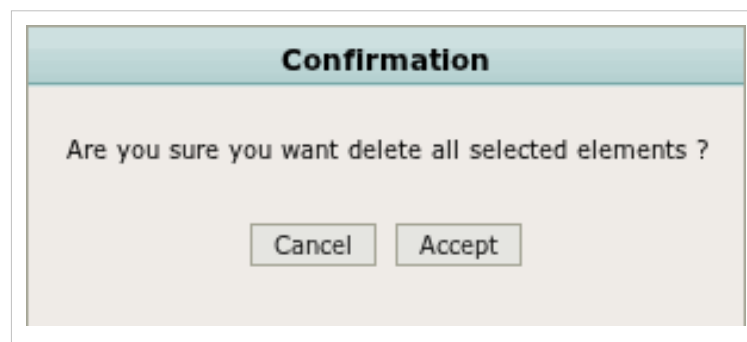


Massive delete

Select some filebrowser rows.

		Name	Size	Update date	Author
	<input type="checkbox"/>	OpenKM		05-07-2012 13:00:55	Administrator
	<input type="checkbox"/>	presentaciones		05-07-2012 13:01:01	Administrator
	<input checked="" type="checkbox"/>	proyectos		05-07-2012 13:01:10	Administrator
	<input type="checkbox"/>	test2		06-07-2012 17:44:04	Administrator
	<input checked="" type="checkbox"/>	document1.pdf	15.0 KB	12-07-2012 09:45:11	Administrator
	<input checked="" type="checkbox"/>	document2.pdf	15.7 KB	12-07-2012 09:45:25	Administrator
	<input type="checkbox"/>	document3.pdf	15.3 KB	12-07-2012 09:45:59	Administrator
	<input type="checkbox"/>	mail_项目后评价.txt	1.2 KB	05-07-2012 08:58:35	Administrator
	<input type="checkbox"/>	merged.pdf	44.6 KB	12-07-2012 17:13:51	Administrator

Execute the action delete will be shown a confirmation popup.



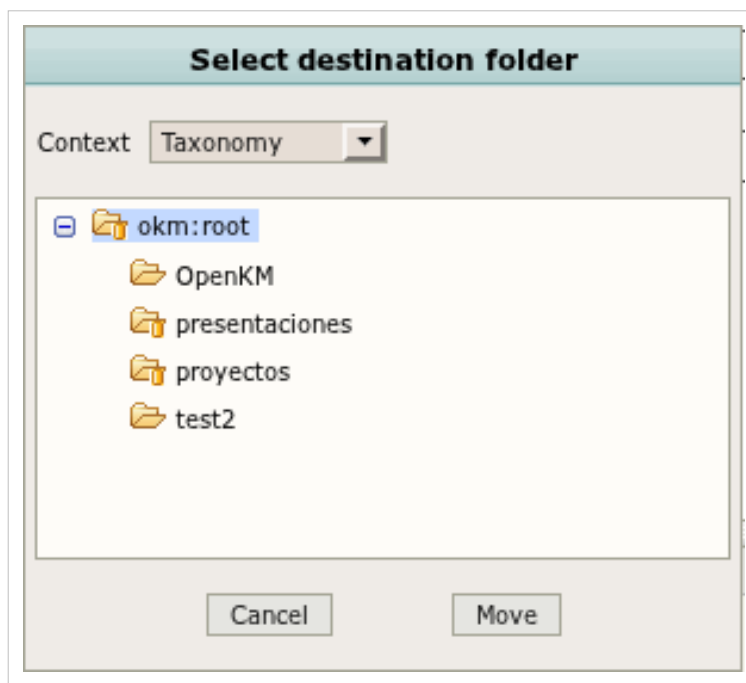
Click **Accept** button. All selected rows will be deleted.

Massive move

Select some filebrowser rows.

		Name	Size	Update date	Author
	<input type="checkbox"/>	OpenKM		05-07-2012 13:00:55	Administrator
	<input type="checkbox"/>	presentaciones		05-07-2012 13:01:01	Administrator
	<input checked="" type="checkbox"/>	proyectos		05-07-2012 13:01:10	Administrator
	<input type="checkbox"/>	test2		06-07-2012 17:44:04	Administrator
	<input checked="" type="checkbox"/>	document1.pdf	15.0 KB	12-07-2012 09:45:11	Administrator
	<input checked="" type="checkbox"/>	document2.pdf	15.7 KB	12-07-2012 09:45:25	Administrator
	<input type="checkbox"/>	document3.pdf	15.3 KB	12-07-2012 09:45:59	Administrator
	<input type="checkbox"/>	mail_项目后评价.txt	1.2 KB	05-07-2012 08:58:35	Administrator
	<input type="checkbox"/>	merged.pdf	44.6 KB	12-07-2012 17:13:51	Administrator

Execute the action move will be shown a destination folder popup.



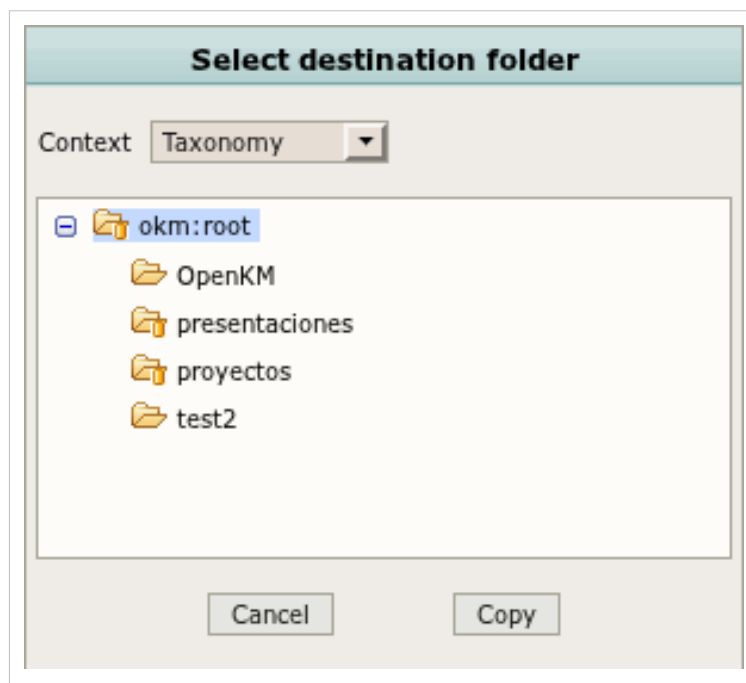
Click **Move** button. All selected rows will be moved to destination folder.

Massive copy

Select some filebrowser rows.

		Name	Size	Update date	Author
	<input type="checkbox"/>	OpenKM		05-07-2012 13:00:55	Administrator
	<input type="checkbox"/>	presentaciones		05-07-2012 13:01:01	Administrator
	<input checked="" type="checkbox"/>	proyectos		05-07-2012 13:01:10	Administrator
	<input type="checkbox"/>	test2		06-07-2012 17:44:04	Administrator
	<input checked="" type="checkbox"/>	document1.pdf	15.0 KB	12-07-2012 09:45:11	Administrator
	<input checked="" type="checkbox"/>	document2.pdf	15.7 KB	12-07-2012 09:45:25	Administrator
	<input type="checkbox"/>	document3.pdf	15.3 KB	12-07-2012 09:45:59	Administrator
	<input type="checkbox"/>	mail_项目后评价.txt	1.2 KB	05-07-2012 08:58:35	Administrator
	<input type="checkbox"/>	merged.pdf	44.6 KB	12-07-2012 17:13:51	Administrator

Execute the action copy will be shown a destination folder popup.



Click **Copy** button. All selected rows will be copied to destination folder.

Massive add category

Select some filebrowser rows.

		Name	Size	Update date	Author
	<input type="checkbox"/>	OpenKM		05-07-2012 13:00:55	Administrator
	<input type="checkbox"/>	presentaciones		05-07-2012 13:01:01	Administrator
	<input checked="" type="checkbox"/>	proyectos		05-07-2012 13:01:10	Administrator
	<input type="checkbox"/>	test2		06-07-2012 17:44:04	Administrator
	<input checked="" type="checkbox"/>	document1.pdf	15.0 KB	12-07-2012 09:45:11	Administrator
	<input checked="" type="checkbox"/>	document2.pdf	15.7 KB	12-07-2012 09:45:25	Administrator
	<input type="checkbox"/>	document3.pdf	15.3 KB	12-07-2012 09:45:59	Administrator
	<input type="checkbox"/>	mail_项目后评价.txt	1.2 KB	05-07-2012 08:58:35	Administrator
	<input type="checkbox"/>	merged.pdf	44.6 KB	12-07-2012 17:13:51	Administrator

Execute the action add category will be shown a popup.



For each category to be added, select the category and Click **Add** button. The category will be added in each selected rows objects. Optionally any new added category can be removed.

Massive add keyword

Select some filebrowser rows.

		Name	Size	Update date	Author
	<input type="checkbox"/>	OpenKM		05-07-2012 13:00:55	Administrator
	<input type="checkbox"/>	presentaciones		05-07-2012 13:01:01	Administrator
	<input checked="" type="checkbox"/>	proyectos		05-07-2012 13:01:10	Administrator
	<input type="checkbox"/>	test2		06-07-2012 17:44:04	Administrator
	<input checked="" type="checkbox"/>	document1.pdf	15.0 KB	12-07-2012 09:45:11	Administrator
	<input checked="" type="checkbox"/>	document2.pdf	15.7 KB	12-07-2012 09:45:25	Administrator
	<input type="checkbox"/>	document3.pdf	15.3 KB	12-07-2012 09:45:59	Administrator
	<input type="checkbox"/>	mail_项目后评价.txt	1.2 KB	05-07-2012 08:58:35	Administrator
	<input type="checkbox"/>	merged.pdf	44.6 KB	12-07-2012 17:13:51	Administrator

Execute the action add keyword will be shown a popup.

Add keyword

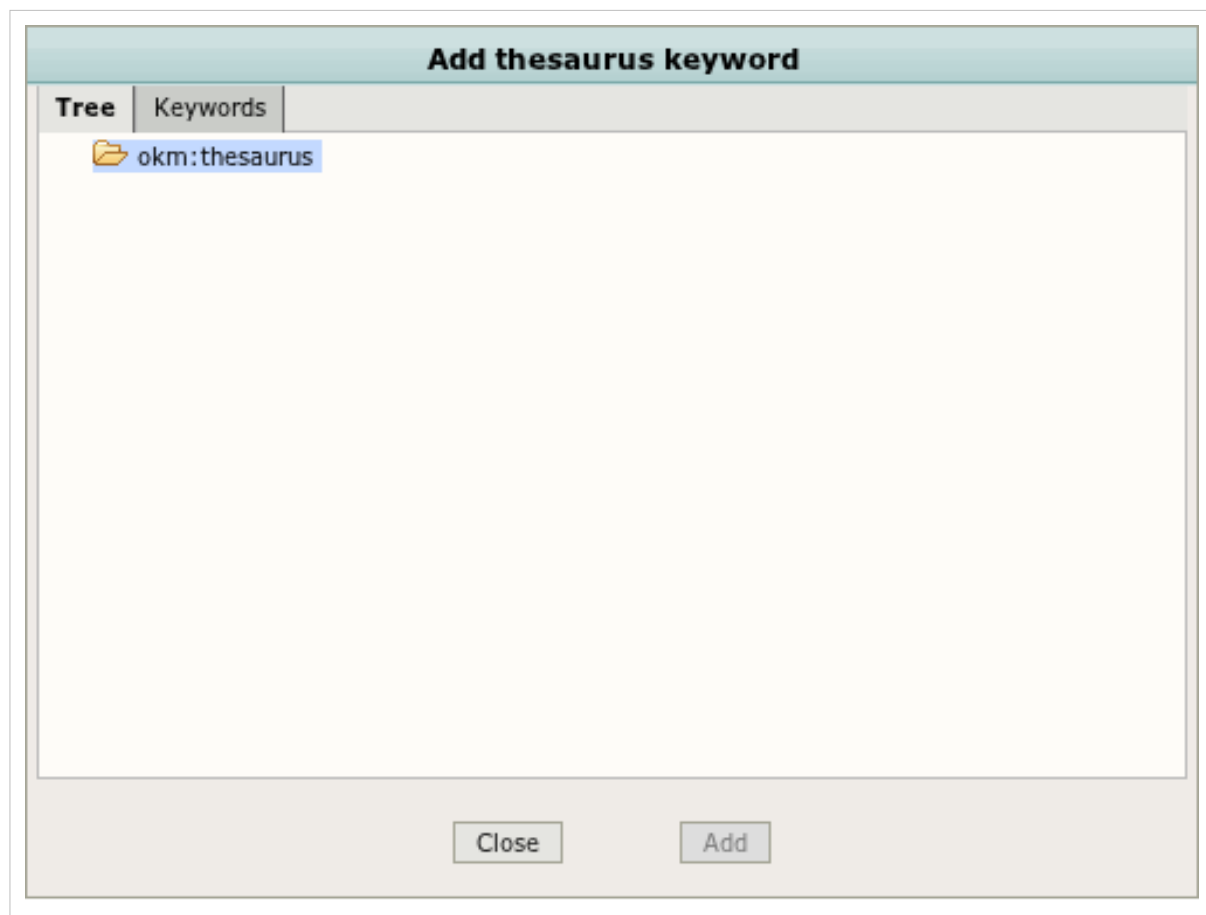
Keywords

Keywords cloud

openkm massicve

Write a keyword and Click **Add** button. The keyword will be added in each selected rows objects. Optionally any new added keyword can be removed.

If thesaurus is enabled can select keyword from theaurus using the thesaurus icon will appearing the thesaurus popup.



Massive property group

Select some filebrowser rows.

		Name	Size	Update date	Author
	<input type="checkbox"/>	OpenKM		05-07-2012 13:00:55	Administrator
	<input type="checkbox"/>	presentaciones		05-07-2012 13:01:01	Administrator
	<input checked="" type="checkbox"/>	proyectos		05-07-2012 13:01:10	Administrator
	<input type="checkbox"/>	test2		06-07-2012 17:44:04	Administrator
	<input checked="" type="checkbox"/>	document1.pdf	15.0 KB	12-07-2012 09:45:11	Administrator
	<input checked="" type="checkbox"/>	document2.pdf	15.7 KB	12-07-2012 09:45:25	Administrator
	<input type="checkbox"/>	document3.pdf	15.3 KB	12-07-2012 09:45:59	Administrator
	<input type="checkbox"/>	mail_项目后评价.txt	1.2 KB	05-07-2012 08:58:35	Administrator
	<input type="checkbox"/>	merged.pdf	44.6 KB	12-07-2012 17:13:51	Administrator

Execute the action add property group will be shown a popup.

Add property group

Cancel

Add

Select the property group and Click **Add** button will be shown property group fields.

Add property group

Consulting

Name

Comment

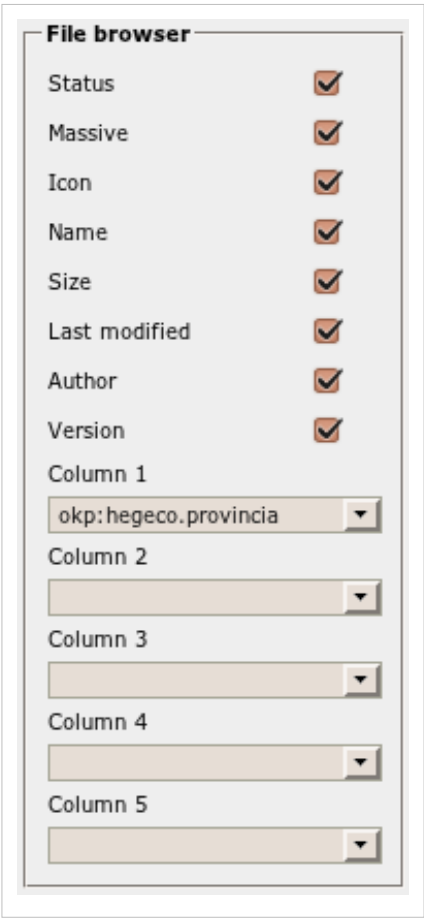
Cancel

Add

Fill the fields and Click **Add** button. The property group will be added in each selected rows objects.

Extra columns

In administration Profiles can be set file browser extra columns based in property groups.

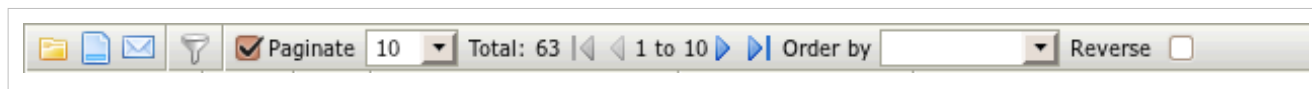


After updating profile, user desktop filebrowser will be shown with extra columns.

		Name	Size	Update date	Author	Version	Provincia	Estado
	<input type="checkbox"/>	OpenKM		05-07-2012 13:00:55	Administrator			
	<input type="checkbox"/>	presentaciones		05-07-2012 13:01:01	Administrator		Barcelona	Firmado
	<input type="checkbox"/>	proyectos		05-07-2012 13:01:10	Administrator		Alicante/Alacant	Firmado
	<input type="checkbox"/>	test2		06-07-2012 17:44:04	Administrator		Alicante/Alacant	
	<input type="checkbox"/>	document1.pdf	15.0 KB	12-07-2012 09:45:11	Administrator	1.0		Pendiente
	<input type="checkbox"/>	document2.pdf	15.7 KB	12-07-2012 09:45:25	Administrator	1.0	Lleida	
	<input type="checkbox"/>	document3.pdf	15.3 KB	12-07-2012 09:45:59	Administrator	1.0	Balears (Illes)	Pendiente
	<input type="checkbox"/>	mail_项目后评价.txt	1.2 KB	05-07-2012 08:58:35	Administrator	1.4	Lleida	Pendiente
	<input type="checkbox"/>	merged.pdf	44.6 KB	12-07-2012 17:13:51	Administrator	1.0	Balears (Illes)	

Pagination

Pagination allows users navigate across great size repositories. If Extra_columns are enabled can ordering and filtering for it too.



Available features:

- → Show / hide folders
- → Show / hide documents
- → Show / hide mails
- → change filtering options
- → next
- → previous
- → goto start
- → goto end

Filtering options:

Filter

Clean all

Name

Size

Bytes

↔

Bytes

Update date

↔

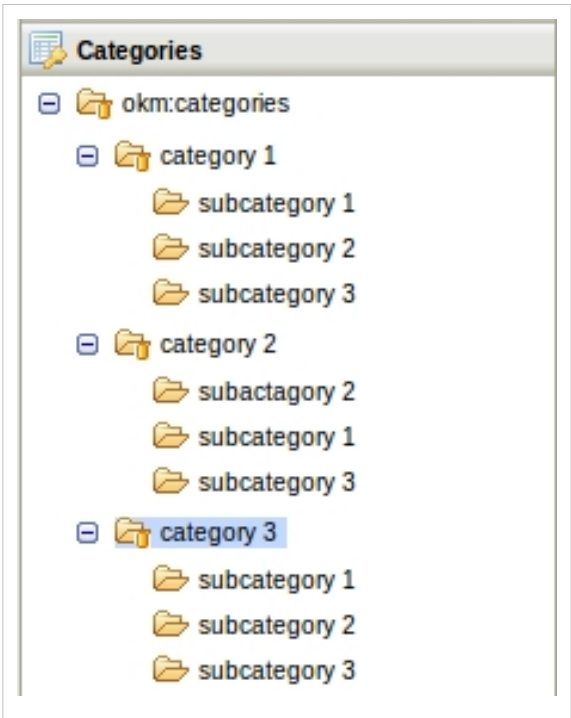
Author

Version

Accept

Categories

Categories is a hierarchical tree structure of category and subcategory folders. The idea is that folders and subfolders represent some conceptual tree structure.



A document can be linked with many category folders at same time. Each time some category folder is selected, all related documents will be displayed in file browser panel. All the major document functionalities are available from this view.

Path : /okm:categories/category 1/subcategory 1/

	Name	Size	Update date	Author	Version
	text_file.txt	43 Bytes	10-06-2010 08:46:17	okmAdmin	1.0

PropertiesNotesSecurityHistoryPreviewTechnology

UUID

c98ef532-6b6a-4787-8708-10f3d3dc9ba9

Name

text_file.txt

Folder

/okm:trash/okmAdmin

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

Type the keyword

test

marketing

Status

Available

Subscribed

No

History size

43 Bytes

Subscribed users

Keywords cloud

test

marketing

Categories

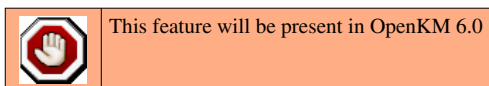
category 2

category 2/subcategory 1

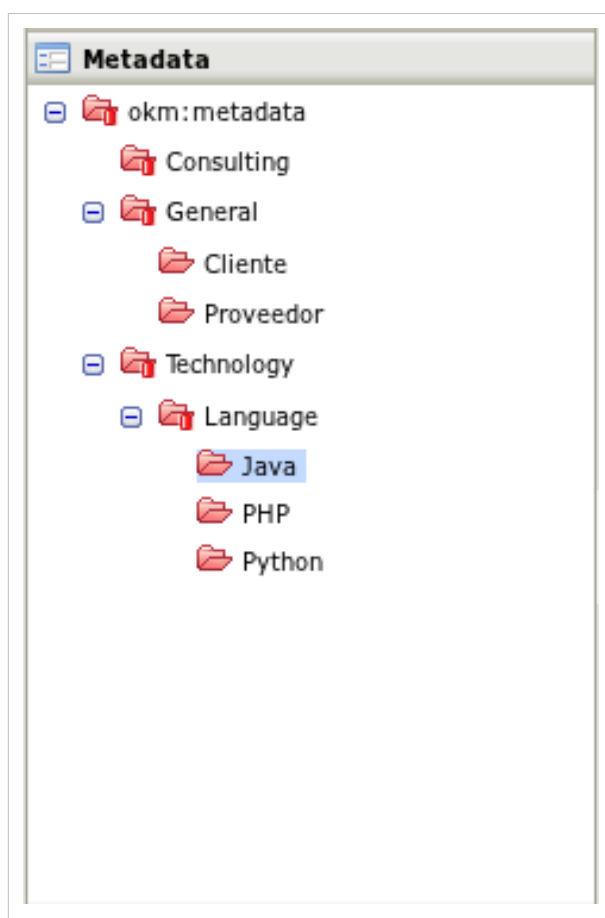
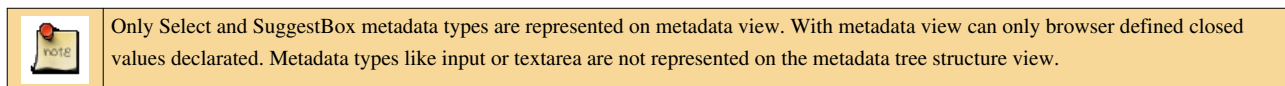
category 1/subcategory 1

category 2/subcategory 3

Metadata view






Metadata view is a hierarchical tree structure of metadata groups (property groups). Each possible metadata value is represented as a tree node structure.






A document, folder or mail can be linked with many metadata property values folders at the same time. Each time some metadata value folder is selected, all related documents, folders or mails will be displayed in the file browser panel. All the major document, folder or mail functionalities are available from this view.

Path : /okm:metadata/okg:general/okp:general.cliente/NS0128/

	Name	Size	Update date	Author	Version	
	test 2		08-11-2011 16:36:29	josep		
	Abogacia.pdf	93.4 KB	07-11-2011 12:44:56	okmAdmin	1.0	
	[OpenKM 0001515]	3.2 KB	13-01-2011 17:54:16	Mantis Bug Tracker		

Properties | Notes | Security

UUID		Subscribed users
Name	Azulejos Mallol S.A.	Keywords cloud
Parent	/okm:metadata/okg:general/okp:general.cliente	Categories 
Created	14-11-2011 12:52:07 by	
Subscribed	No	
Folders	1	
Documents	1	
Mails	1	
Keywords		
URL		
WebDAV		

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. SKOS concepts are linked many to many, but are represented as a tree structure.






A document, folder or mail can be linked with many SKOS folders at the same time. Each time some SKOS folder is selected, all related documents, folder or mails will be displayed in the file browser panel. All the major document,m folder or mail functionalities are available from this view.

Path : /okm:thesaurus/Supply and employment/

	Name	Size	Update date	Author	Version
	text_file.txt	43 Bytes	10-18-2010 10:16:07	okmAdmin	1.0

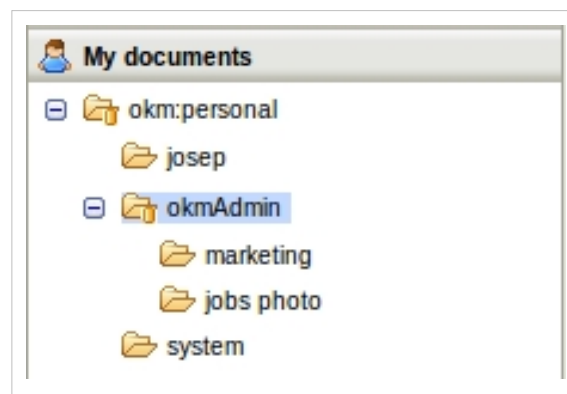
Properties | Notes | Security | History | Preview | Technology

UUID fff2b0de-02e9-404e-86a2-70f4ed86ec86 Name text_file.txt Folder /okm:root/marketing/asia Size 43 Bytes Created 10-18-2010 10:16:07 by okmAdmin Modified 10-18-2010 10:16:07 by okmAdmin MIME type text/plain Keywords <input type="text" value="Type the keyword"/>  <input type="button" value="Supply_and_employment"/> 	Subscribed users Keywords cloud Supply_and_employment Categories 
--	--

Status Available
Subscribed No
History size 43 Bytes

My documents

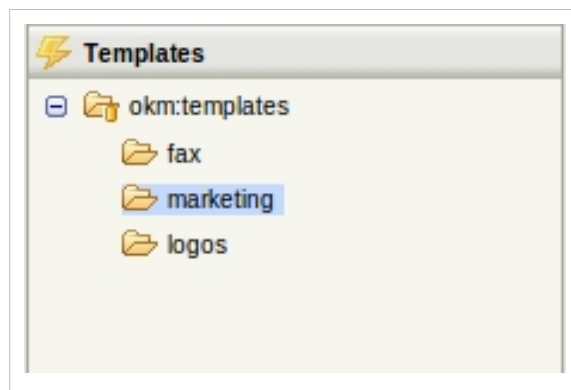
My documents is a tree folder structure to organise a user's personal documents. The documents are only available to the owner.



From version 5.x and above, any user with administrator rights can navigate across all users "My documents" folder structure.

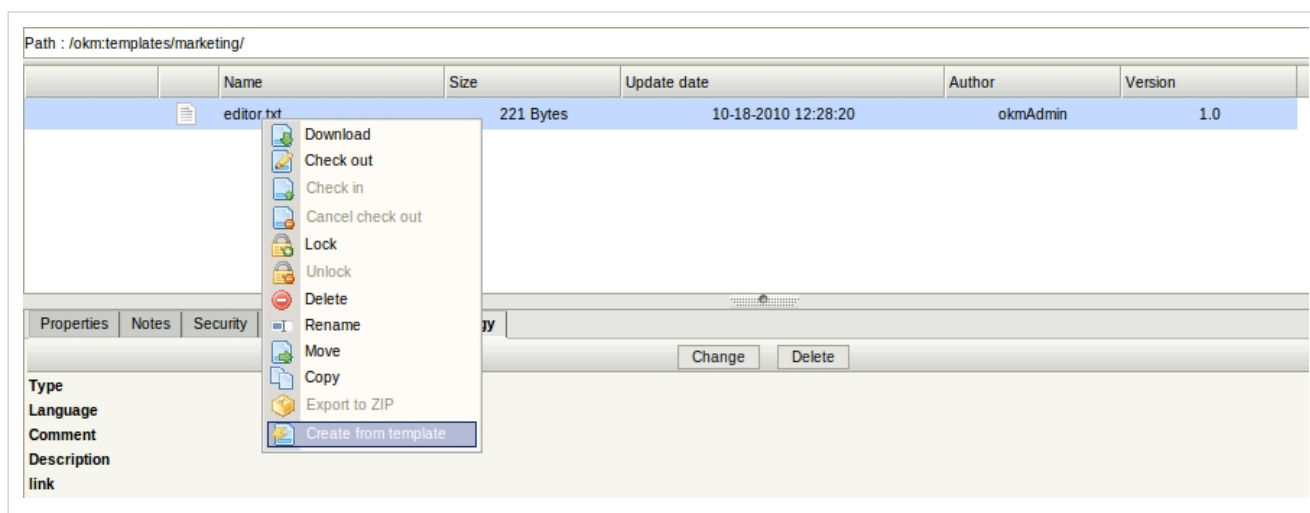
Templates

Templates is a tree folder structure to organise source documents. The idea is that an organization can create new documents (for example fax, new project document templates, invoices, etc.) from documents in the templates panel.

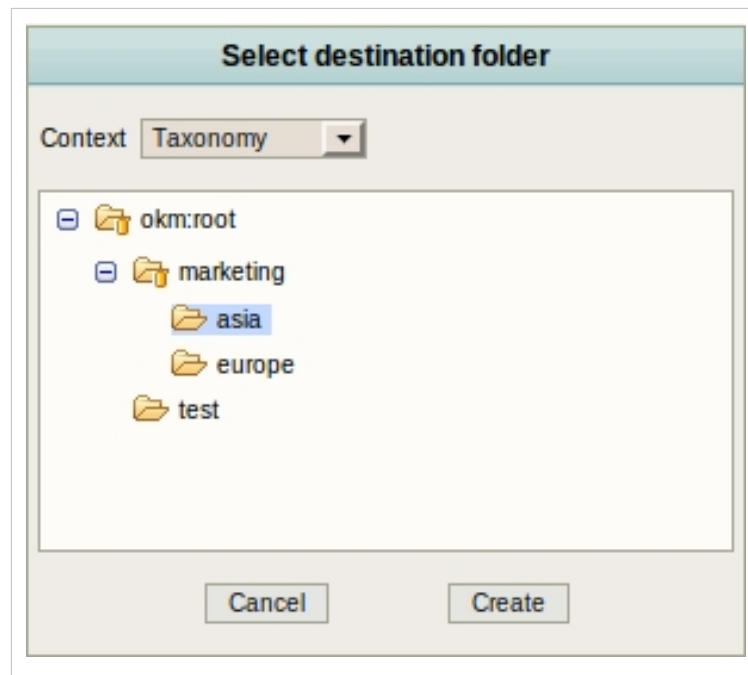


Create new document from template

First, from the Templates panel, select a document, and execute the option "create from template". A popup will appear requesting the destination folder.



After that, optionally rename the document.



If the selected document is a pdf and has some Property_Groups (metadata) associated with it, then a creation wizard popup will appear. Property group fields will be requested in order to combine with the generation of the 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]

	Name	Size	Update date	Author	Version	
📁	test		03-01-2011 04:33:42	okmAdmin		
📄	formulario.odt	11.8 KB	03-01-2011 04:33:54	okmAdmin	1.0	
📄	formulario.pdf	24.0 KB	03-01-2011 04:34:10	okmAdmin	1.0	

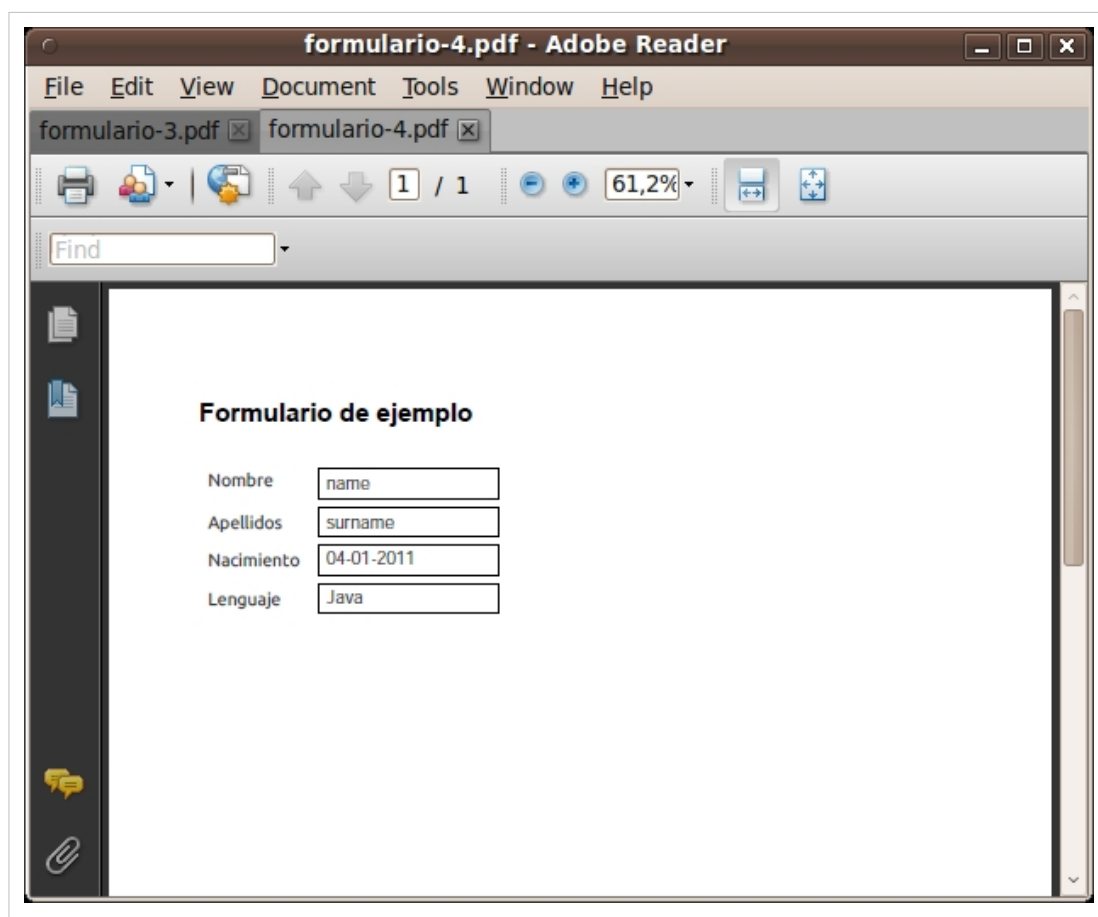
Properties	Notes	Security	History	Preview	Formulario
<div>Change Delete</div> <div>Nombre Apellidos Nacimiento Lenguaje</div>					

The screenshot shows a PDF viewer window titled 'formulario-3.pdf'. The menu bar includes File, Edit, View, Document, Tools, Window, and Help. The toolbar contains icons for printing, saving, and navigation, along with a page indicator '1 / 1' and a zoom level of '61,2%'. A search bar with the text 'Find' is visible. A purple banner at the top of the document area contains the text: 'Please fill out the following form. You cannot save data typed into this form. Please print your completed form if you would like a copy for your records.' and a 'Highlight Fields' button. The form itself is titled 'Formulario de ejemplo' and contains four input fields: 'Nombre', 'Apellidos', 'Nacimiento', and 'Lenguaje'. A vertical toolbar on the left side of the document area includes icons for document management and a paperclip icon.

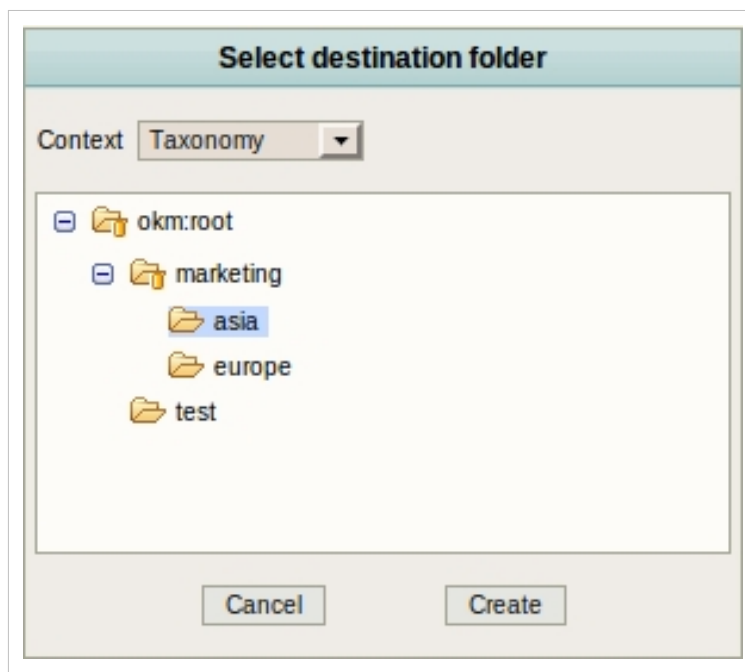
The wizard

The screenshot shows a 'Create document wizard' dialog box. The title bar is 'Create document wizard'. Below the title bar is a tab labeled 'Formulario'. The dialog contains four input fields: 'Nombre', 'Apellidos', 'Nacimiento', and 'Lenguaje'. The 'Nacimiento' field has a calendar icon next to it. The 'Lenguaje' field is a dropdown menu. An 'Accept' button is located at the bottom right of the dialog.

And finally, the generated PDF with property group fields added by the user.

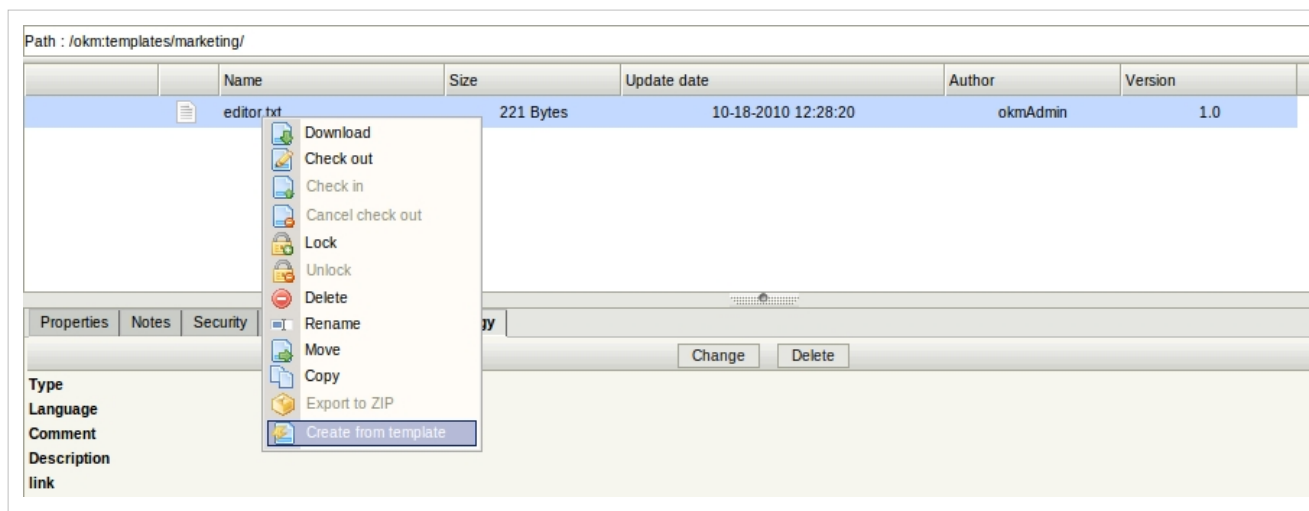


After that, optionally rename the document.

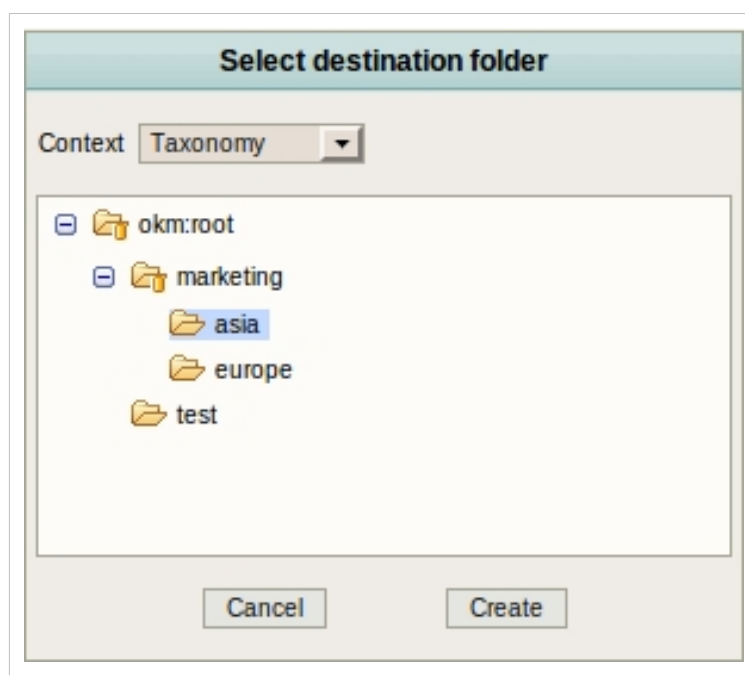


OpenKM 5 and above

First, from the Templates panel, select a document, and execute the option "create from template". A popup will appear requesting the destination folder.



After that, optionally rename the document.



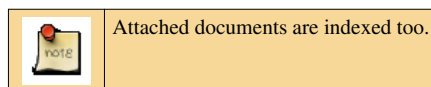
See also Creating templates.

References

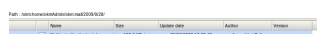
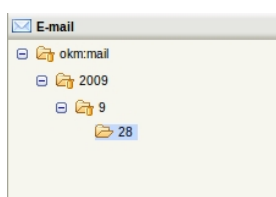
- [1] <http://www.adobe.com/products/acrobat.html>
- [2] <http://danielp.wordpress.com/2008/07/02/how-to-create-pdf-forms-with-openoffice/>
- [3] <http://pdfformsdesigner.sourceforge.net/index.html>

E-mail

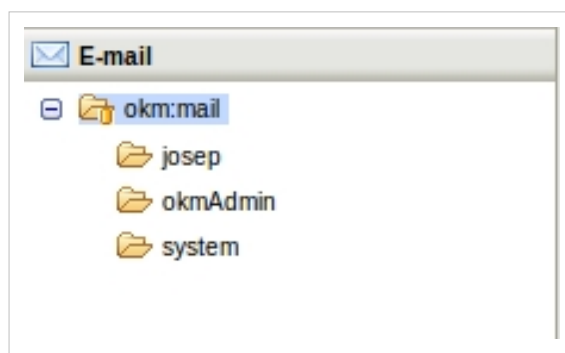
Import users emails from some user mail account using IMAP. Importation is done automatically by OpenKM every 60 minutes. Depending on the network bandwidth configuration and other parameters, refreshing time could be greater than this.



The importing mechanism creates a folder structure based on year, month and day to automatically organize imported mails.



From version 5.x users with administrator rights have access to all users emails.



Copy attached document

Right-clicking on a document and selecting the "Copy" option will bring up a menu to select the destination folder to copy the attached document.

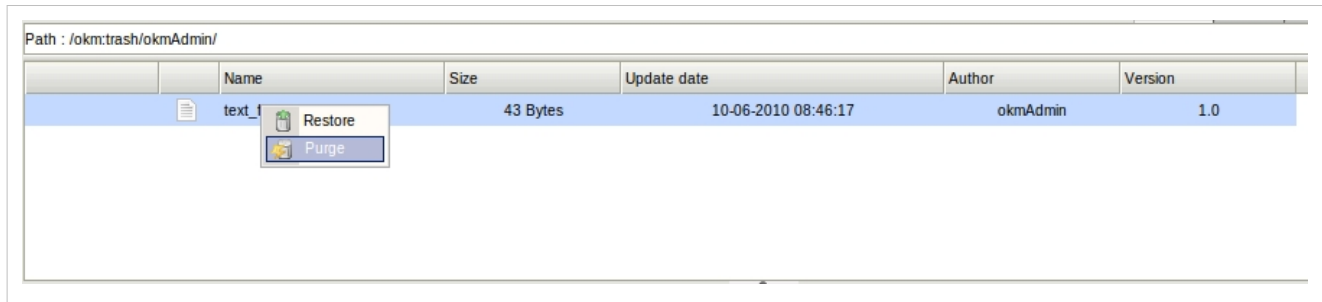
Download attached document

Right-clicking on a document and selecting the "Download" option will download the attached document.

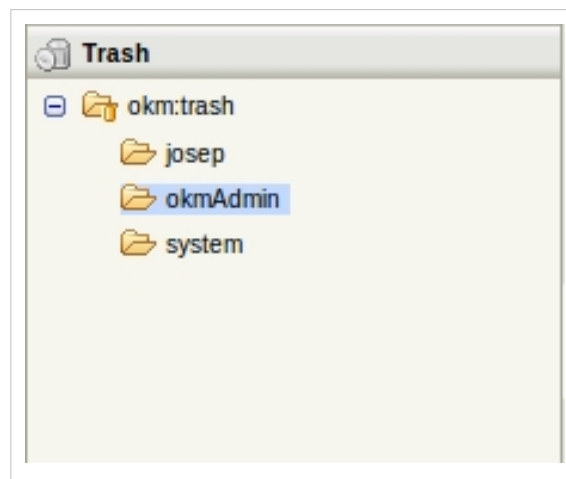
Trash

Deleted files and folders are stored in Trash in order to be able to recover them if their deletion 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 administrator rights 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 provided for the files, you can search using this field. You can also do 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 most to least relevant.

The screenshot displays a search results interface. At the top, there are tabs for 'Basic', 'Advanced', and 'Metadata'. The 'Basic' tab is active, showing search filters: Context (Taxonomy), Content, Name, Keywords, User, and Date range between. On the right, there are checkboxes for 'View advanced mode', 'Results compact view', 'View property groups', and 'Save as user news'. Below these are buttons for 'Save search', 'Page results' (set to 10), 'Clean', and 'Search'.

The search results are listed below the filters, showing four documents:

- doc1.pdf 1.1**: Folder: /okm:root/registro/colegiado/2012, Author: Administrator, Size: 67.4 KB, Version: 1.1, Update date: 18-07-2012 09:40:19. Categories: test, test2.
- travel to greece.txt 1.0**: Folder: /okm:root/travel, Author: Administrator, Size: 988 Bytes, Version: 1.0, Update date: 25-07-2012 10:37:39.
- irland.txt 1.0**: Folder: /okm:root/registro, Author: Administrator, Size: 988 Bytes, Version: 1.0, Update date: 25-07-2012 10:37:18.
- travel to spain.txt 1.6**: Folder: /okm:root/travel_done, Author: Administrator, Size: 988 Bytes, Version: 1.6, Update date: 20-07-2012 09:20:50. Categories: test, test2.

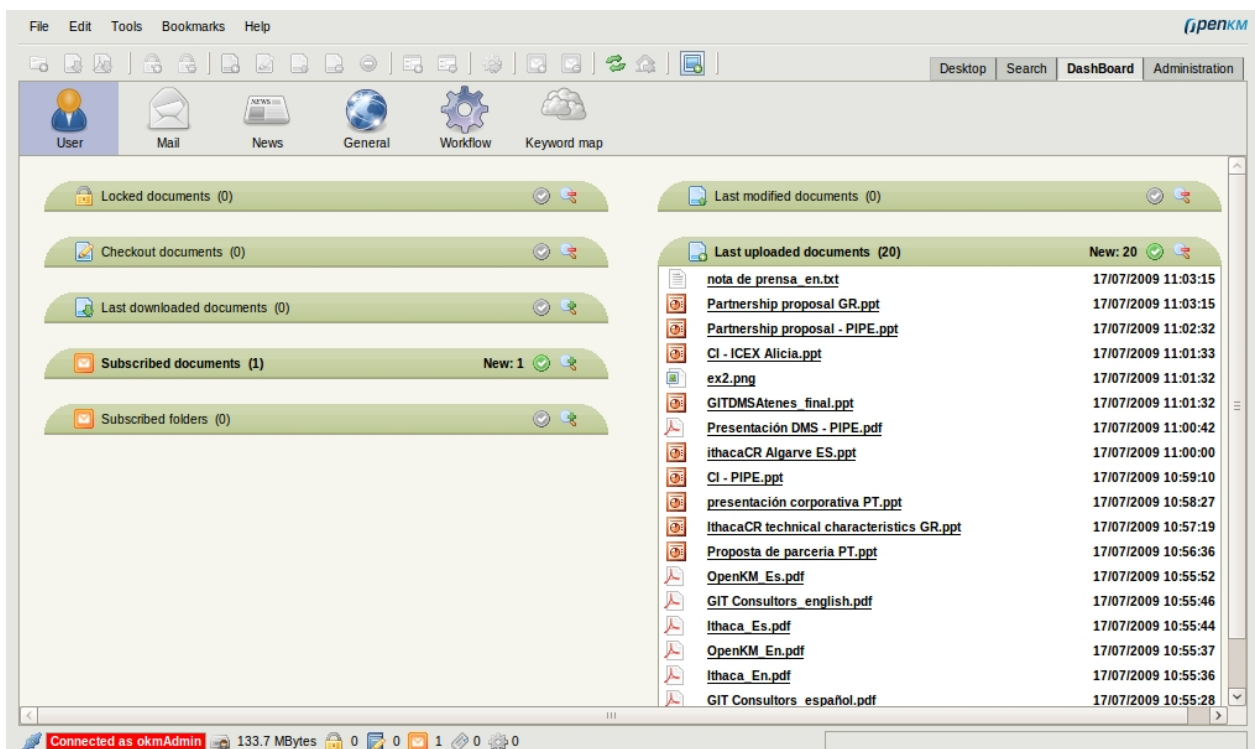
- Fast search
- Making a search

- 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 the Dashboard.

The Dashboard has several information services and utilities for like user, general and email documents, specific document query views, the push search service (news), workflow tasks, and the keyword map (tag cloud view).



To change between these utilities there's a button menu at 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 creation or update of a new document.

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 caused 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 in their mail client with the name "OpenKM" or "OpenKM - NOTIFICATION" to centralise in one single folder all notifications generated by the OpenKM.


Subscription service

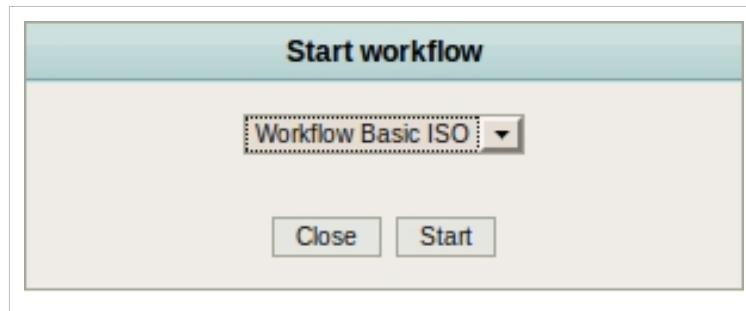
The application allows you to subscribe to a folder or document with the purpose of being informed of the changes on one document in particular, or the documents contained in a particular folder.

These are some of the events which generate a notification:

- Cancelling a document edit
- Uploading 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

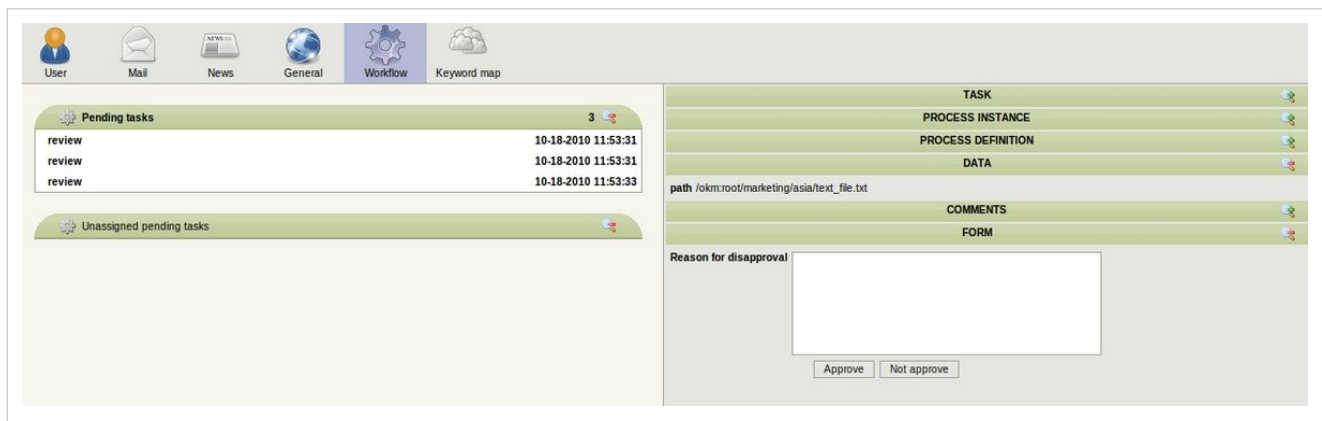
After selecting a document, click on the  start workflow icon, then a popup will appear with the workflows available in OpenKM.



After pressing start button, the workflow will automatically start (sometimes workflow demands some extra parameter information before starting), assigning the first pending task to some user or group.

Workflow pending task

On the Desktop, when a user has a pending workflow task, at the bottom there'll be a  blinking icon that indicates the user has a pending task. Clicking on the  pending task icon will open the dashboard workflow view.



User has some associated pending tasks.



On selecting a pending task, workflow will demand for some information about the pending task. After the user has input this information, workflow will continue to the next task.

The screenshot shows a web form for a pending task. It has a light green header with the title 'TASK' and a small icon. Below the header are several sections: 'PROCESS INSTANCE', 'PROCESS DEFINITION', 'DATA', 'COMMENTS', and 'FORM'. The 'DATA' section contains a text field with the value 'path /okm:root/marketing/asia/text_file.txt'. The 'COMMENTS' section is empty. The 'FORM' section contains a large text area labeled 'Reason for disapproval' and two buttons: 'Approve' and 'Not approve'.

User configuration

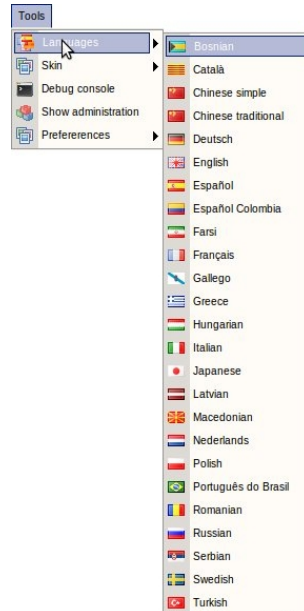
Users can change their own password, email address and optionally configuring their imap email account (it'll be automatically read periodically by OpenKM)

To show user configuration, open the Tools | Preferences menu and then select the option "user configuration".

The screenshot shows a 'User configuration' dialog box. It has a light blue header with the title 'User configuration'. The dialog is divided into two main sections: 'User account' and 'Mail account'. The 'User account' section contains fields for 'User' (okmAdmin), 'Password' (two input fields), 'E-mail' (admin@noreply.com), and 'Roles' (AdminRole). The 'Mail account' section contains fields for 'IMAP server', 'IMAP user name', 'IMAP user password', and 'IMAP folder'. There is a 'Test' button next to the 'IMAP folder' field. At the bottom of the dialog are 'Update' and 'Cancel' buttons.

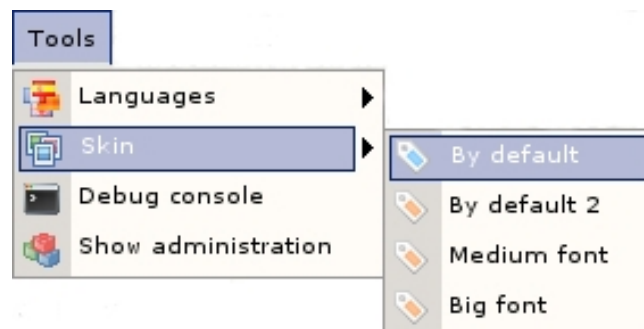
Languages

OpenKM is a multi-language system which allows you to change the language of 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 graphical appearance of the system can be changed by the user depending on the templates defined by the administrator. This option is available from the "Tools / Appearance" menu.



Using iPhone or Android

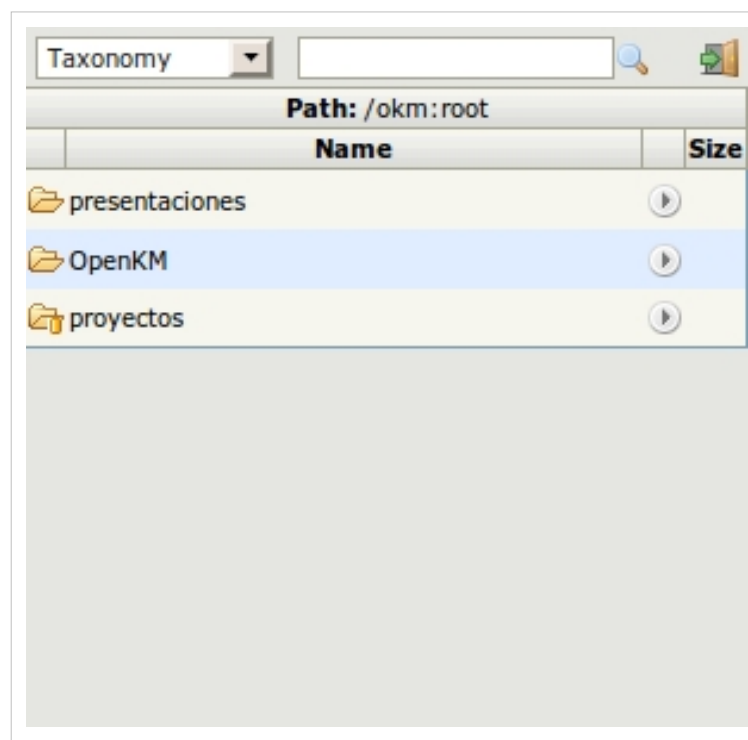
You can use your iPhone or Android device to access OpenKM.

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






The image shows a mobile-optimized login interface for OpenKM. At the top is the OpenKM logo with the tagline "Knowledge Management". Below the logo is a "Language" dropdown menu currently set to "Español". Underneath are input fields for "User name" and "Password". At the bottom is a "Login" button.

Navigation



Making a search

Query: Pla*		
	Name	Size
	analisis de promocion en web por destinos internacionales.doc	 178,5 KB
	Workflow Guide.pdf	 453,4 KB

To download a document, simply click on it.

To view properties, click on the right arrow.

Document properties

Property	Value
UUID	422fddec-fd56-4456-b593-af2ef8a7bf10
Name	analisis de promocion en web por destinos internacionales.doc
Folder	/okm:root/proyectos/AVAI
Size	178,5 KB
Created	Tue Feb 02 11:45:26 CET 2010 by system
Modified	Tue Feb 02 11:45:25 CET 2010 by system
MIME	application/msword
Keywords	
Status	Available
Subscribed	No
Subscribed users	

Folder properties

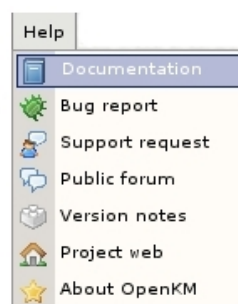
Folder /okm:root/proyectos	
Property	Value
UUID	0364cf45-4ee7-4ed3-93e5-9caa65528af9
Name	proyectos
Parent	/okm:root
Created	Tue Feb 02 11:45:19 CET 2010 by system
Subscribed	No
Subscribed users	

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 include access to the project website (<http://www.openkm.com>) and the display of product credits.

In the version notes you can find the changes that have been made compared to the previous version.



Microsoft Office Addin

Office Add-ins are compatible from version 2000 to version 2007

Outlook Add-in

Outlook_addin enables users to select several emails and import content and attachments to OpenKM.

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

Word Add-in

Word Addin enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM Word Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.

Excel Add-in

Excel Addin enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM Excel Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.

PowerPoint Add-in

PowerPoint Addin enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM PowerPoint Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.



When a user edits a document, it's saved locally in %USER_LOCAL_DOCUMENT_FOLDER%/OpenKM.

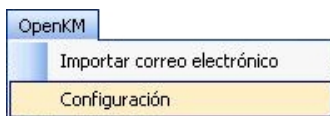


When editing OpenKM documents, a user can decide to upload or cancel editing. After both operations the local file is removed so as not to generate user confusion. When a user uploads a new file, it is not removed from his computer.

Outlook addin

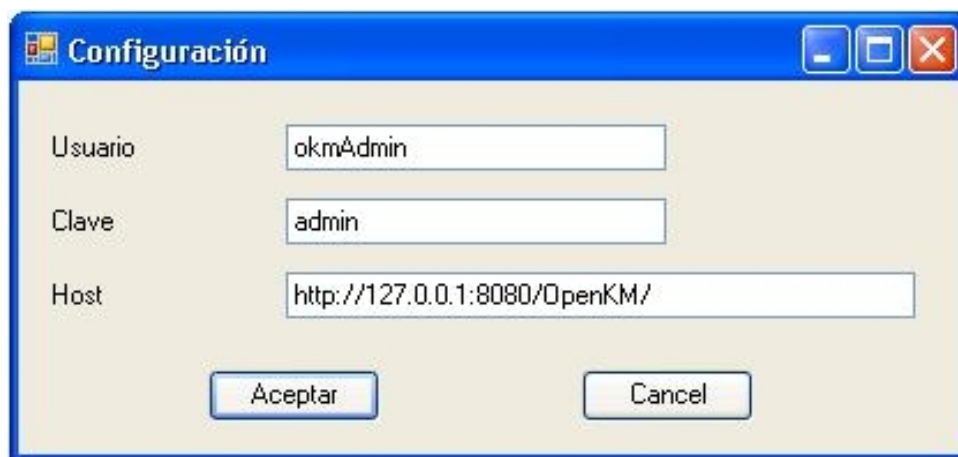
Office Add-ins are compatible from version 2000 to version 2007.

After installing the Outlook add-in, a new menu item "OpenKM" will appear in Outlook.

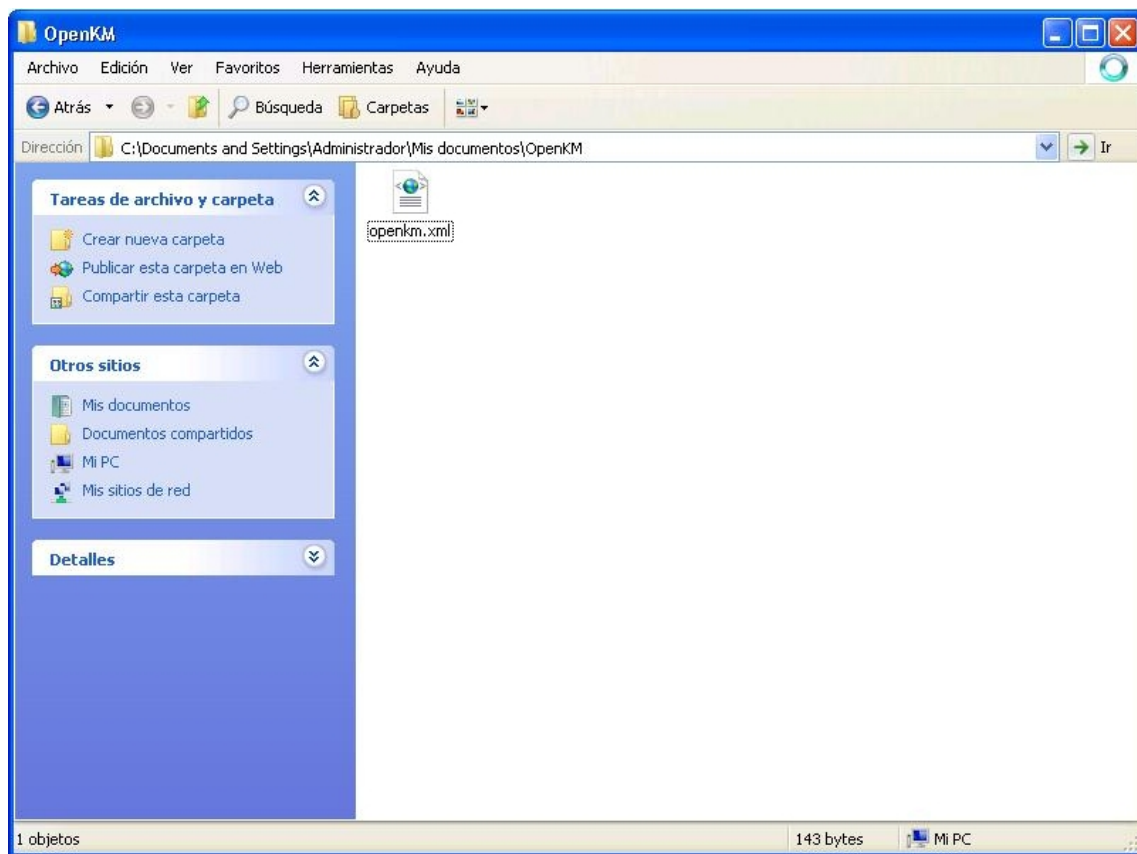


Configure OpenKM Add-In

First you must select the **Configuration** menu item to set your configuration values to access OpenKM from the client computer.

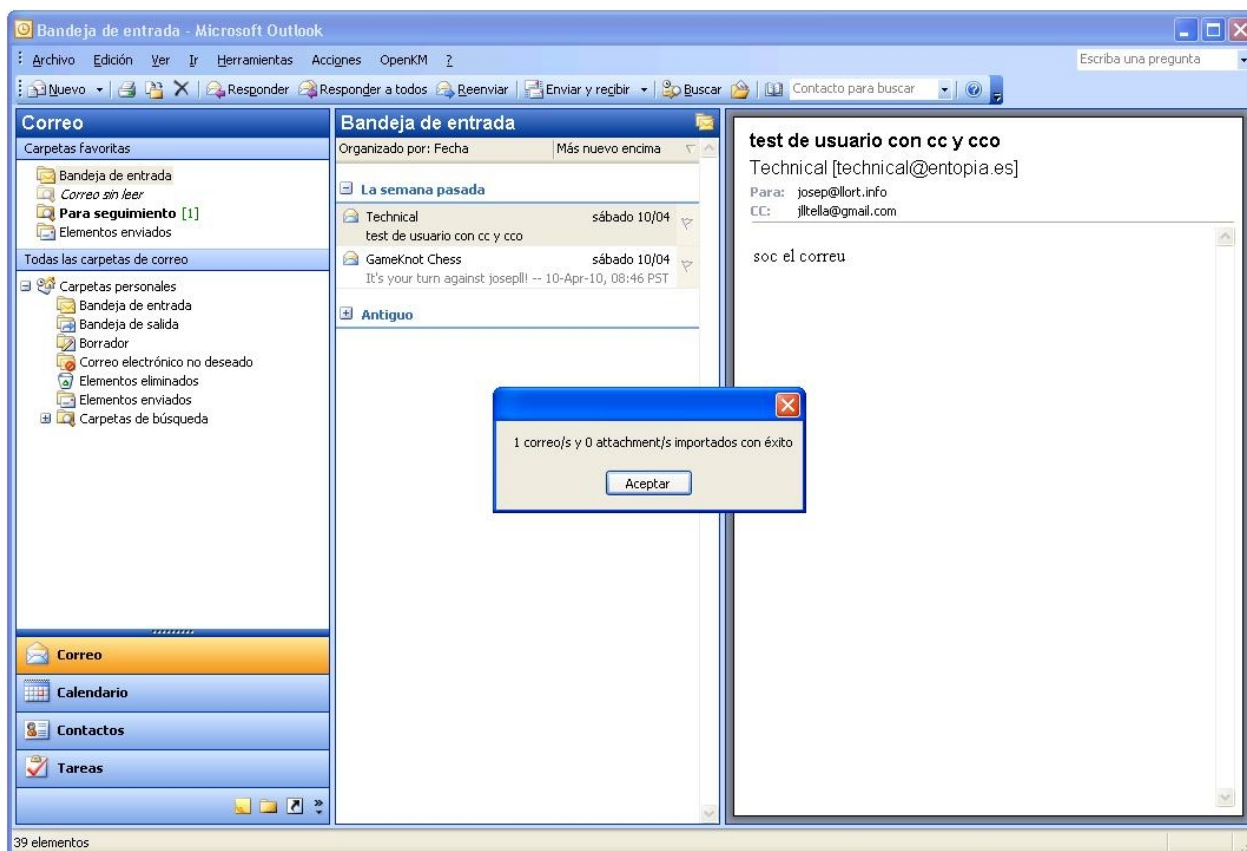


When you set your configuration values, a folder called **OpenKM** is created in your user **My documents folder**. In this OpenKM folder, a configuration file called **openkm.xml** and another file called **document.xml** are created that the OpenKM Add-in uses to store some document editing information. You should not edit or delete these files.



Importing emails to OpenKM

After configuration is done, the user can import emails from Outlook to OpenKM. To import emails, first select one or more emails and then select the Import mail into OpenKM option menu. After importing is finished, a message indicating the number of emails and attachments imported will be displayed.

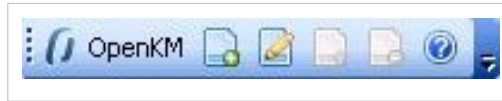


OpenKM Outlook add-in runs with OpenKM 4.1 or higher.







Word Addin

Office Add-ins are compatible from version 2000 to version 2007.

After installing the Word add-in, a new menu item "OpenKM" will appear in Word.

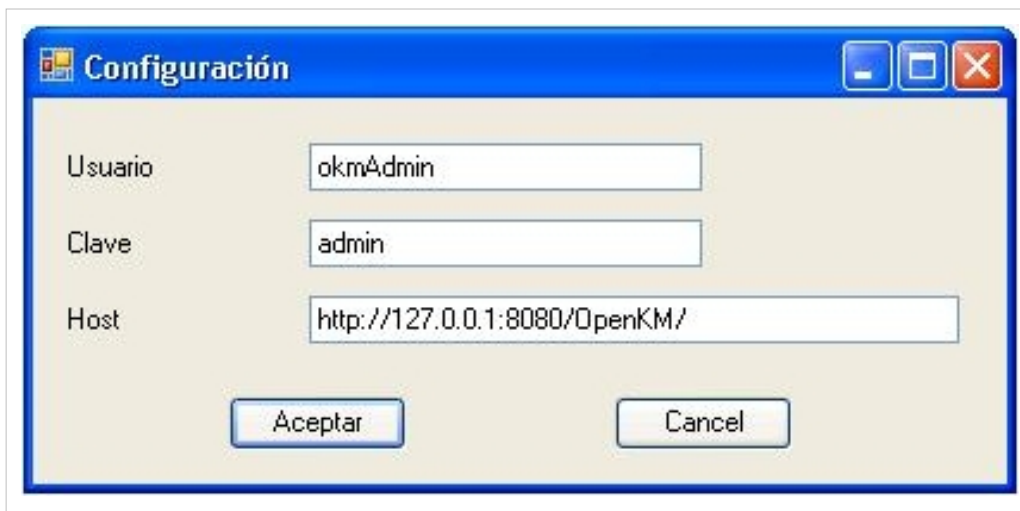


Detail of the functions according to their icons:

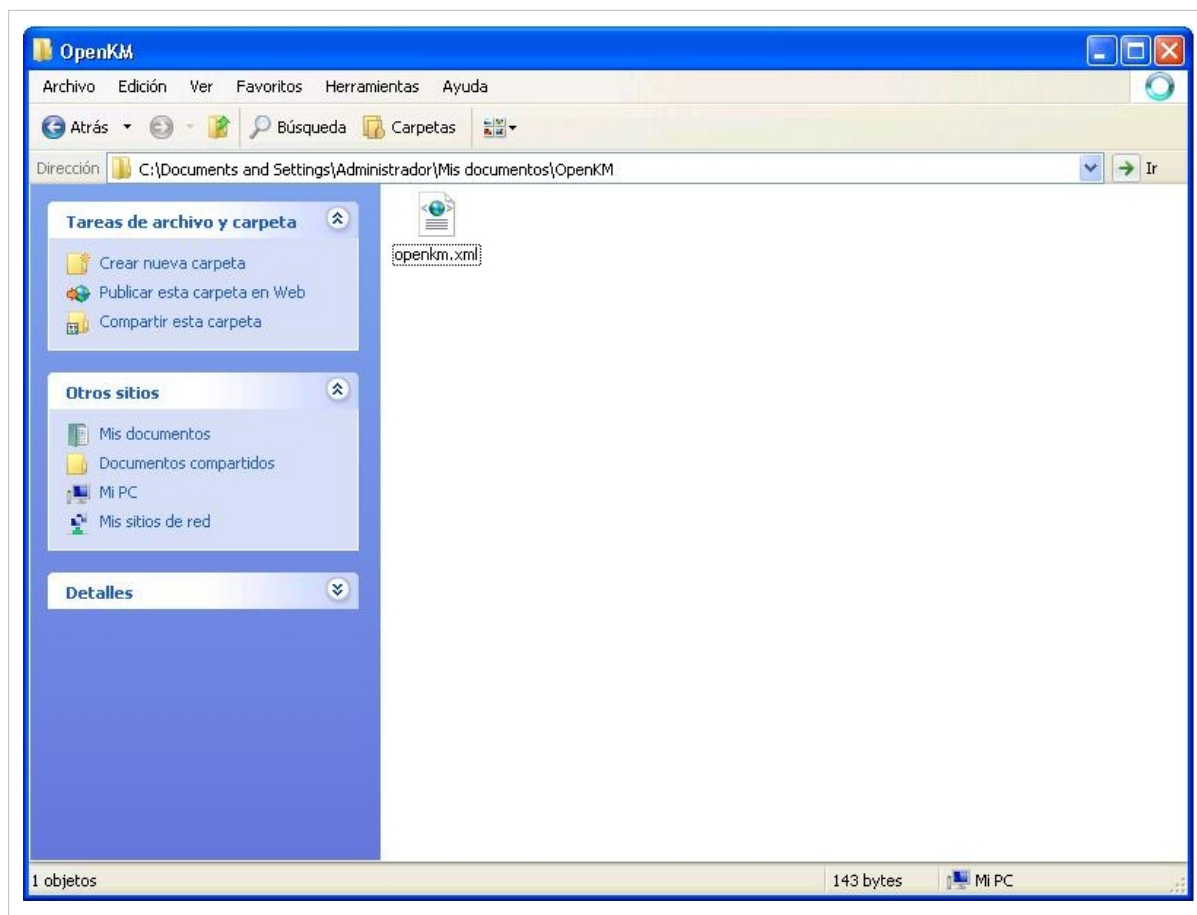
-  → Addin configuration
-  → Add new document
-  → Document edit (check-out)
-  → Upload modified document (check-in)
-  → Cancel document edit
-  → Help

Configure OpenKM Add-In


First you must select the OpenKM tool bar option to set your configuration values to access OpenKM from the client computer. If you've got other OpenKM Add-Ins already installed, this may not be needed.

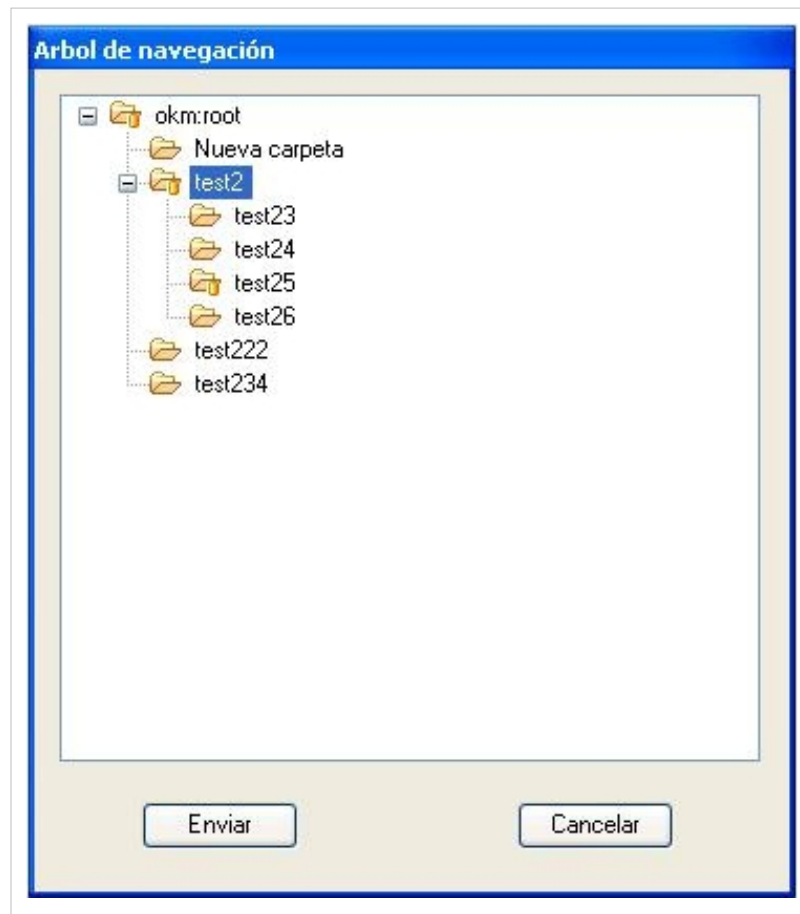


When you set your configuration values, a folder called **OpenKM** is created in your user **My documents folder**. In this OpenKM folder, a configuration file called **openkm.xml** and another file called **document.xml** are created that the OpenKM Add-in uses to store some document editing information. You should not edit or delete these files.

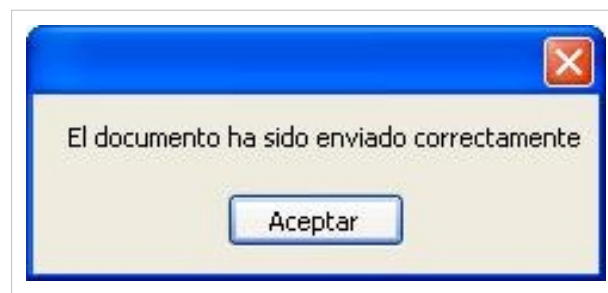


Uploading a new file


After clicking on the  add new document button, a folder tree view will appear. You must select the folder where you want to upload the file.

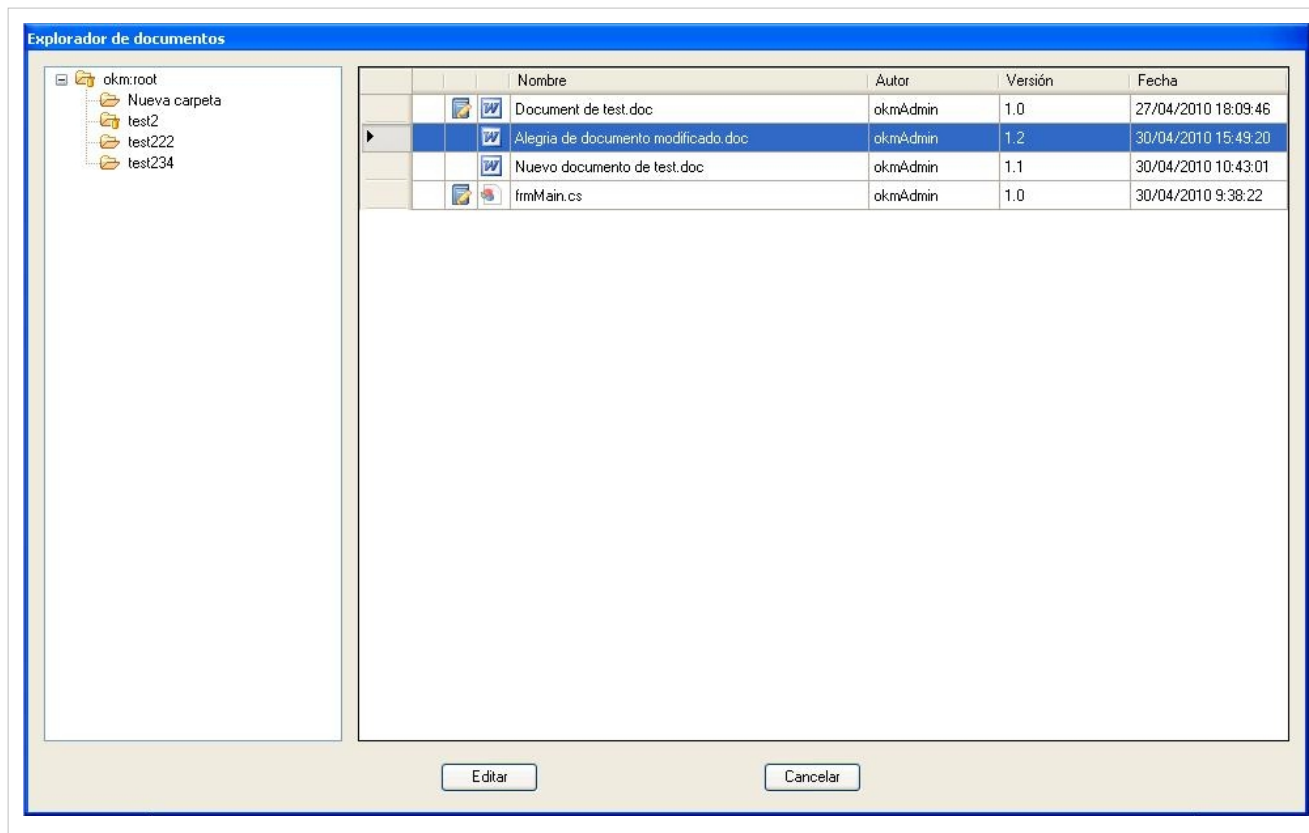



Click on the **Send** Button and after that the document will be uploaded to OpenKM and a notification message will appear.



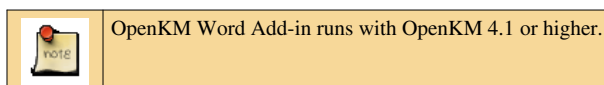
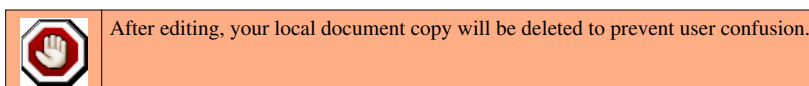
Editing an OpenKM document

After clicking on the  document edit button, a folder navigator will appear. You must navigate across folders and select a document that you want to edit.



When you've got some OpenKM document opened, the  **Upload modified document** (check-in) and  **Cancel document edit** toolbar options will be enabled.

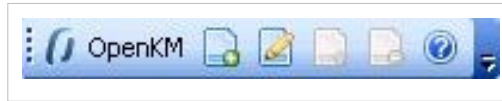
- **To upload modified document**, use the  Upload modified document (check-in) toolbar button.
- **To cancel document editing**, use the  Cancel document edit toolbar button.









Excel Addin

Office Addins are compatible from version 2000 to version 2007.

After installing the Excel add-in, a new menu item "OpenKM" will appear in Excel .

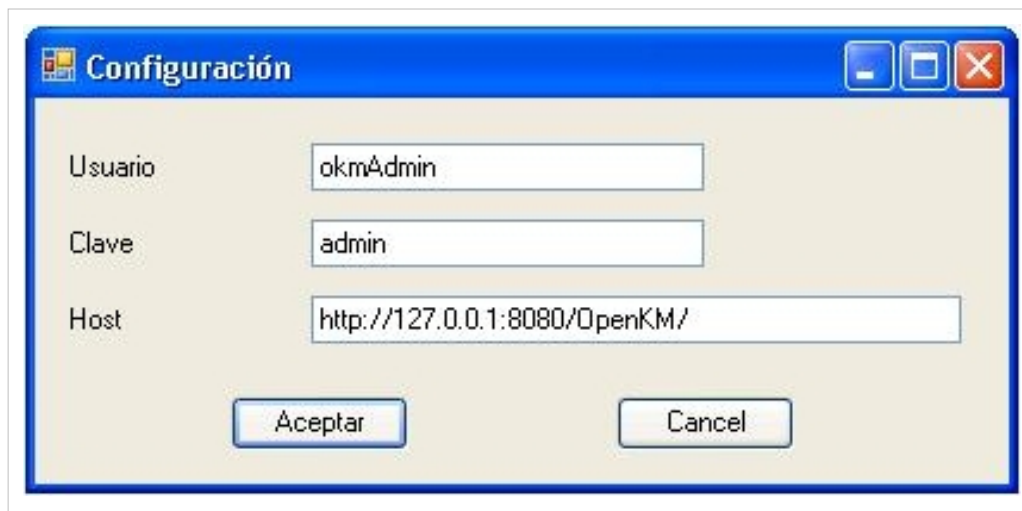


Detail of the functions according to their icons:

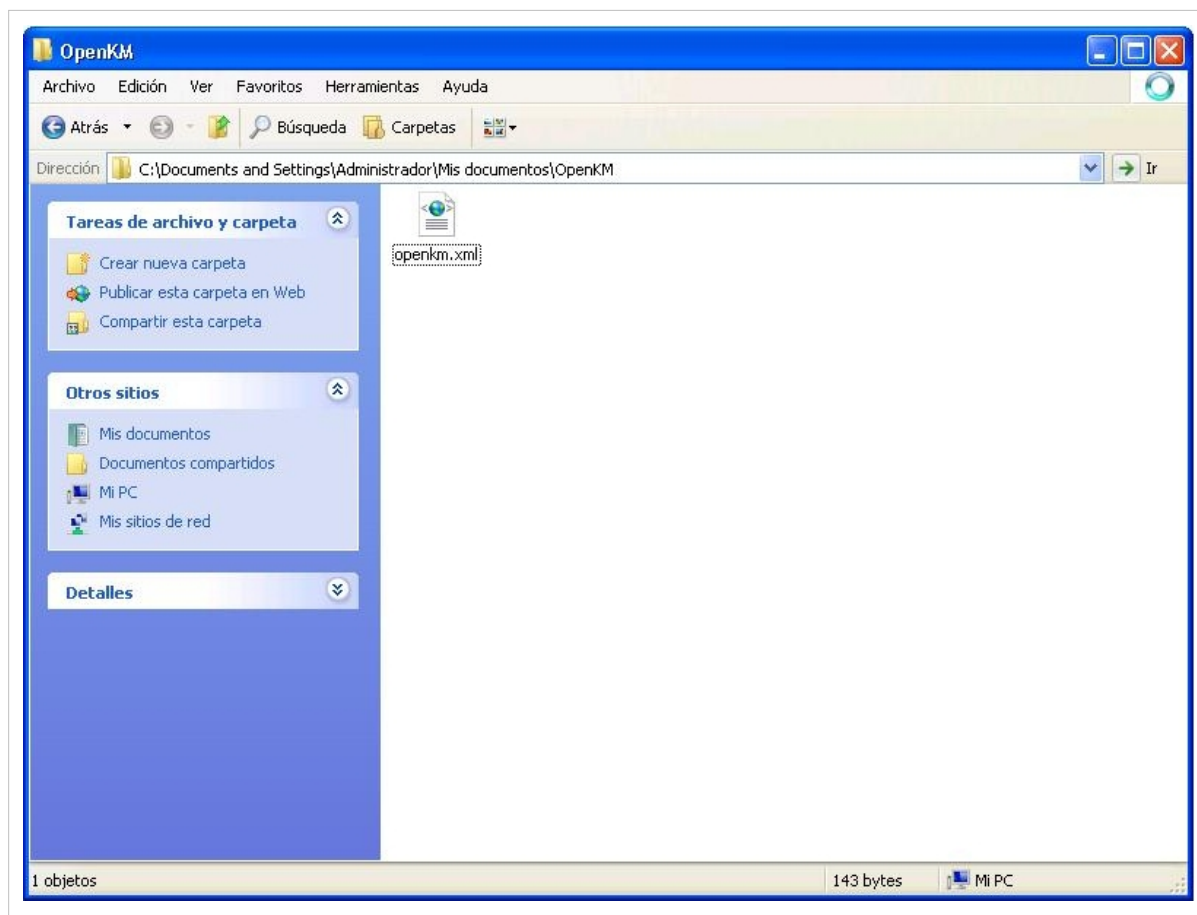
-  → Addin configuration
-  → Add new document
-  → Document edit (check-out)
-  → Upload modified document (check-in)
-  → Cancel document edit
-  → Help

Configure OpenKM AddIn


First you must select the OpenKM tool bar option to set your configuration values to access OpenKM from the client computer. If you've got other OpenKM Add-Ins already installed, this may not be needed.

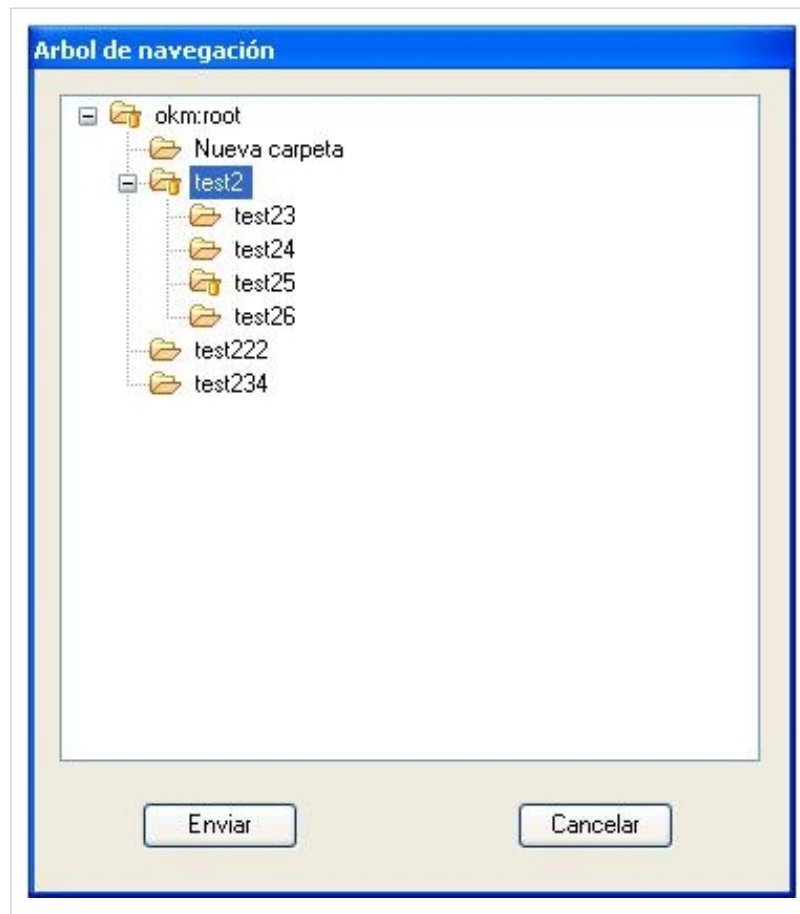


When you set your configuration values, a folder called **OpenKM** is created in your user **My documents folder**. In this OpenKM folder, a configuration file called **openkm.xml** and another file called **document.xml** are created that the OpenKM Add-in uses to store some document editing information. You should not edit or delete these files.

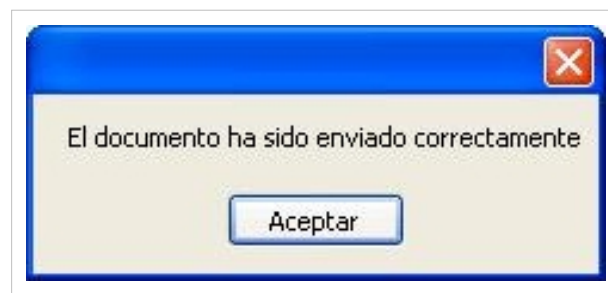


Uploading a new file


After clicking on the  add new document button, a folder tree view will appear. You must select the folder where you want to upload the file.

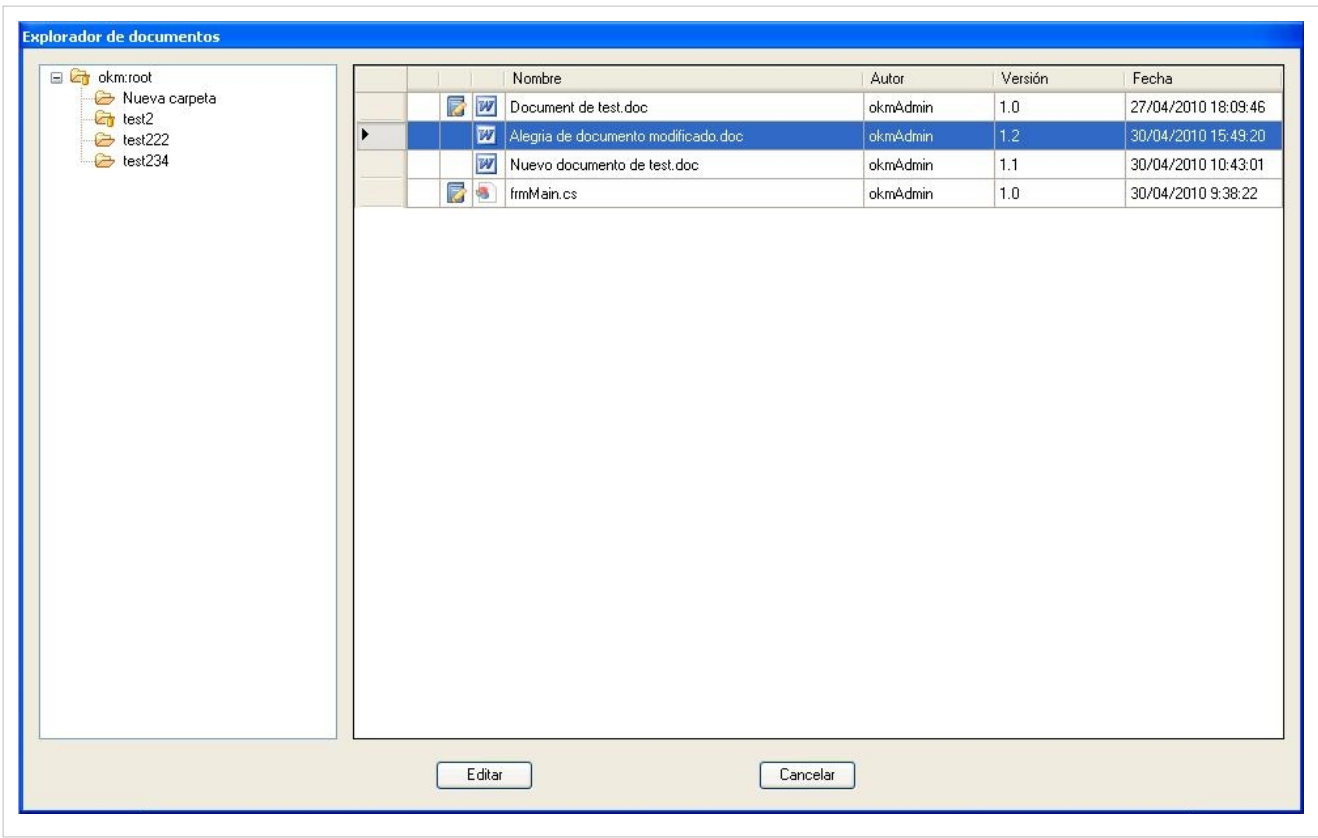




Click on the **Send** Button and after that the document will be uploaded to OpenKM and a notification message will appear.






Editing an OpenKM document

After clicking on the  document edit button, a folder navigator will appear. You must navigate across folders and select a document that you want to edit.




When you've got some OpenKM document opened, the  **Upload modified document** (check-in) and  **Cancel document edit** toolbar options will be enabled.

- **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 Add-in runs with OpenKM 4.1 or higher.







PowerPoint Addin

Office Add-ins are compatible from version 2000 to version 2007.

After installing the PowerPoint add-in, a new menu item "OpenKM" will appear in PowerPoint.



Detail of the functions according to their icons:

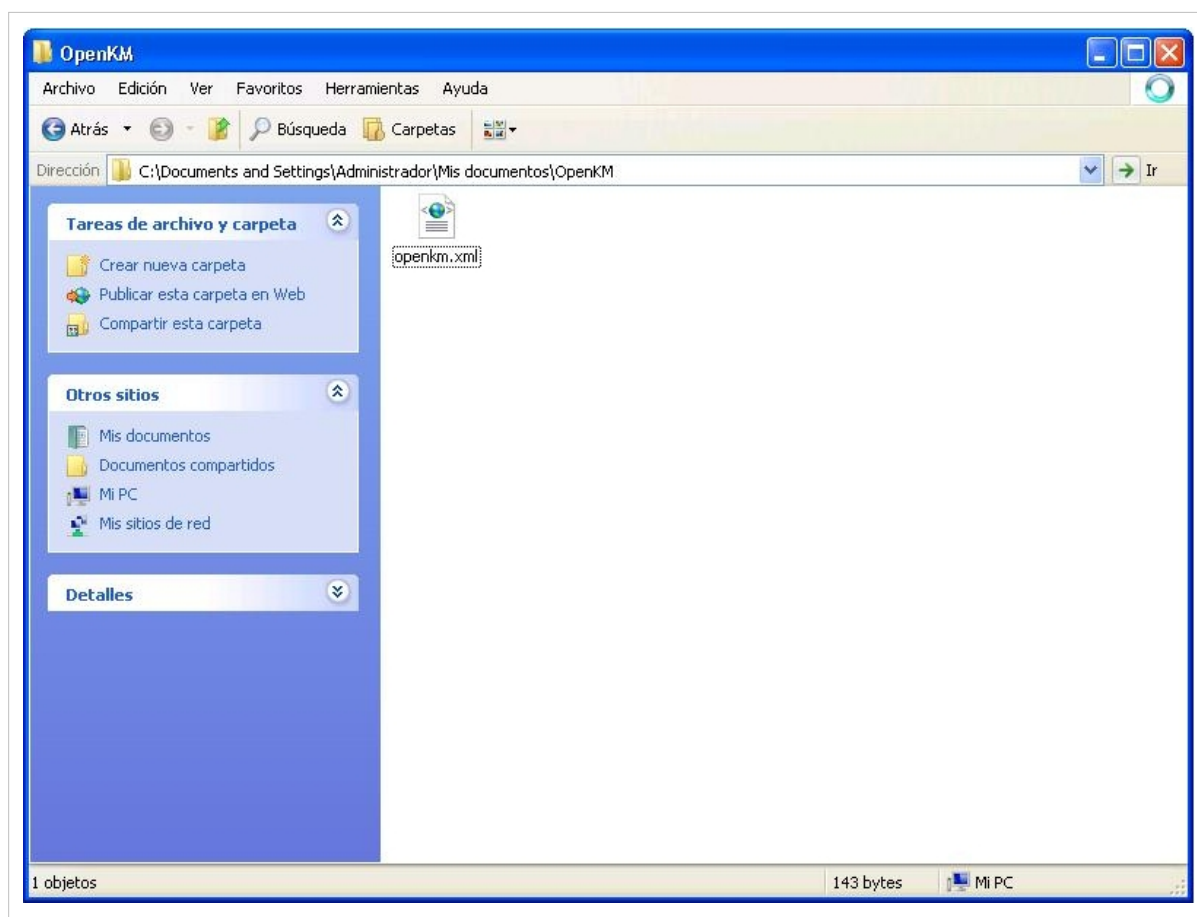
-  → Addin configuration
-  → Add new document
-  → Document edit (check-out)
-  → Upload modified document (check-in)
-  → Cancel document edit
-  → Help

Configure OpenKM Add-In


First you must select the OpenKM tool bar option to set your configuration values to access OpenKM from the client computer. If you've got the OpenKM Add-In already installed, this may not be needed.

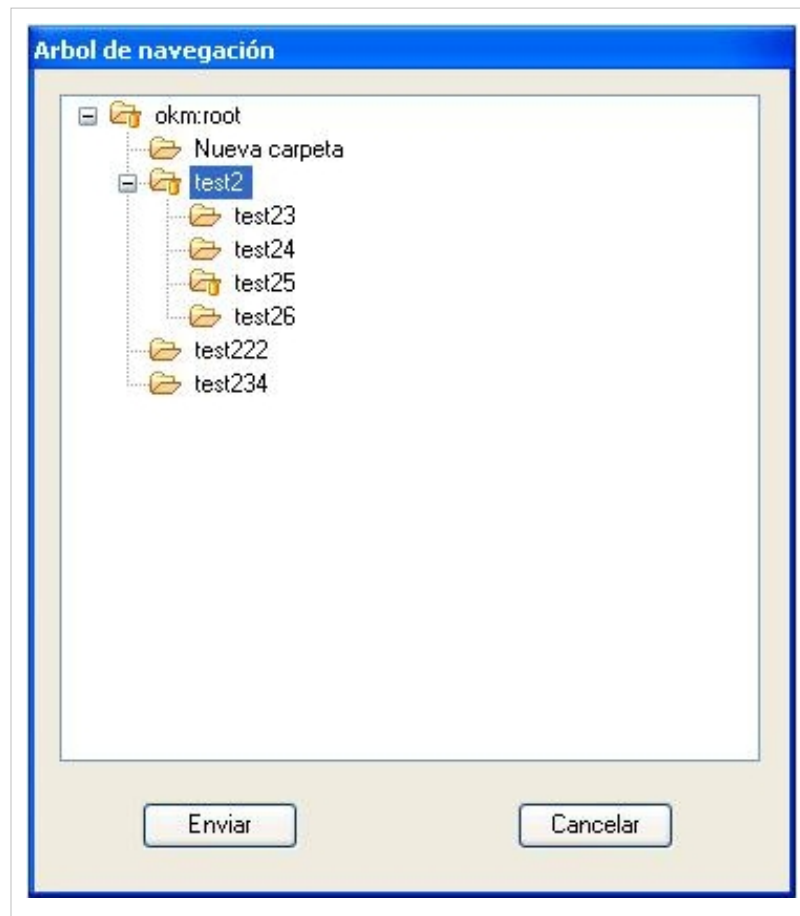


When you set your configuration values, a folder called **OpenKM** is created in your user **My documents folder**. In this OpenKM folder, a configuration file called **openkm.xml** and another file called **document.xml** are created that the OpenKM Add-in uses to store some document editing information. You should not edit or delete these files.

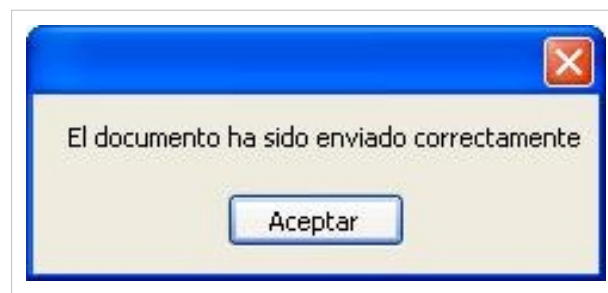


Uploading a new file


After clicking on the  add new document button, a folder tree view will appear. You must select the folder where you want to upload the file.

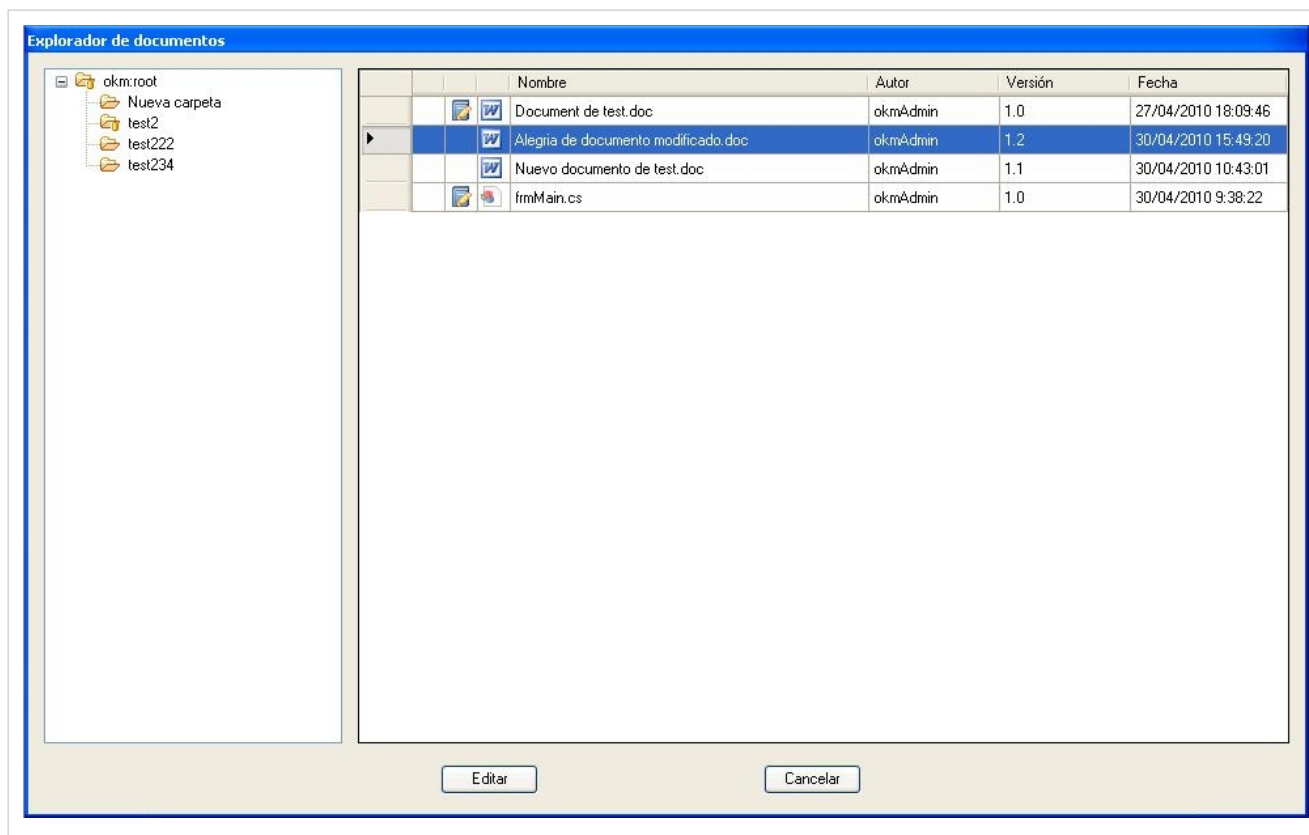



Click on the **Send** Button and after that the document will be uploaded to OpenKM and a notification message will appear.



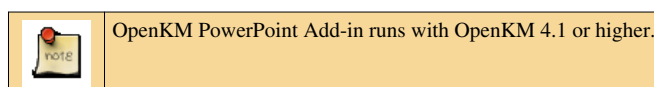
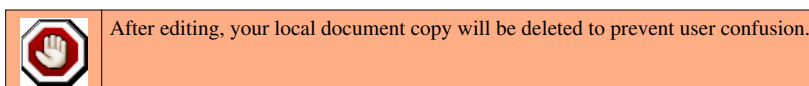
Editing an OpenKM document

After clicking on the  document edit button, a folder navigator will appear. You must navigate across folders and select a document that you want to edit.



When you've got some OpenKM document opened, the  **Upload modified document** (check-in) and  **Cancel document edit** toolbar options will be enabled.

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

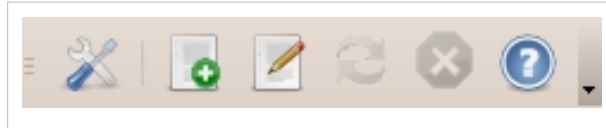


OpenOffice.org Add-on







OpenOffice Add-In

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

After installing OpenOffice Add-In, "OpenKM" appears as a new toolbar. It usually appears in the top-left of the OpenOffice window.

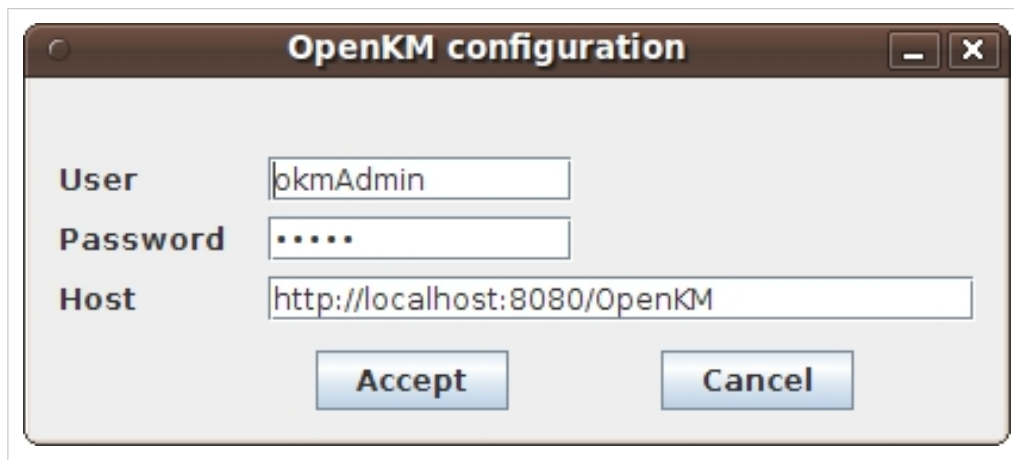


Details of the functions according to their icons:

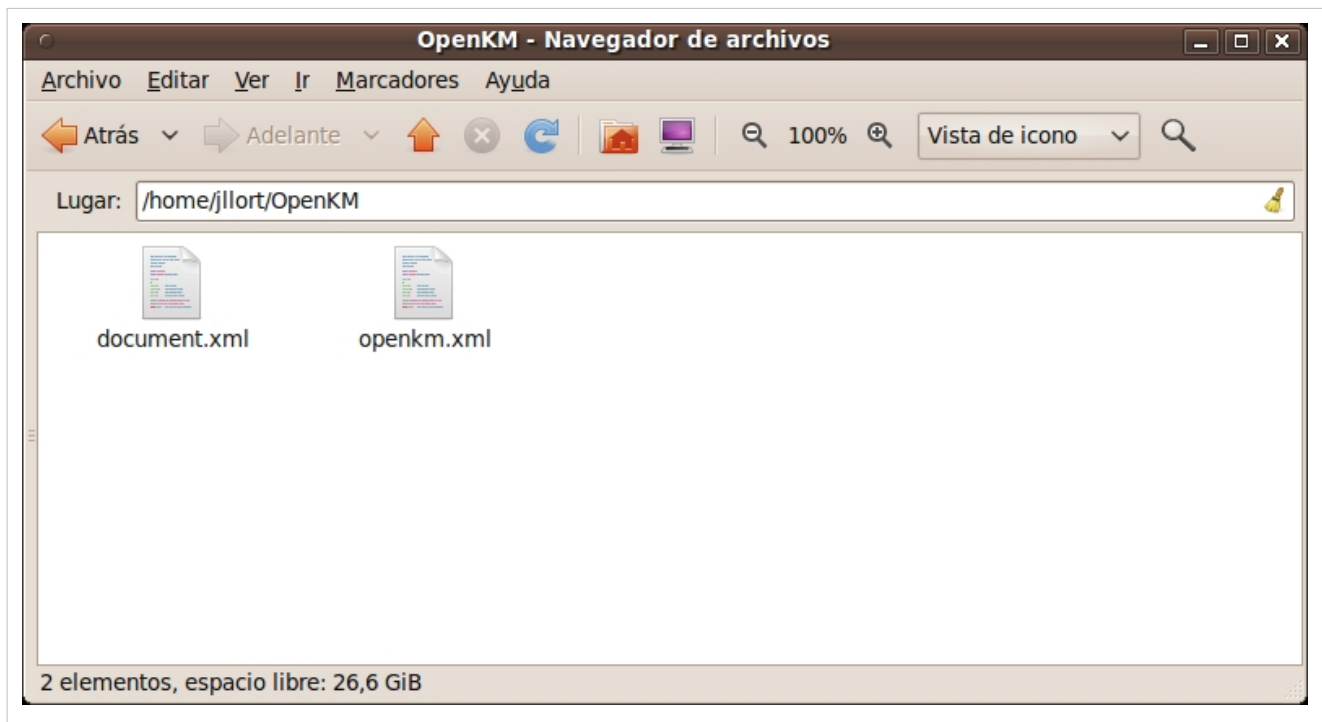
-  → Add-in configuration
-  → Add new document
-  → Document edit (check-out)
-  → Upload modified document (check-in)
-  → Cancel document edit
-  → Help

Configure OpenKM Add-In


First you must select the OpenKM tool bar option to set your configuration values to access OpenKM from the client computer. If you've got the OpenKM Add-In already installed, this may not be needed.

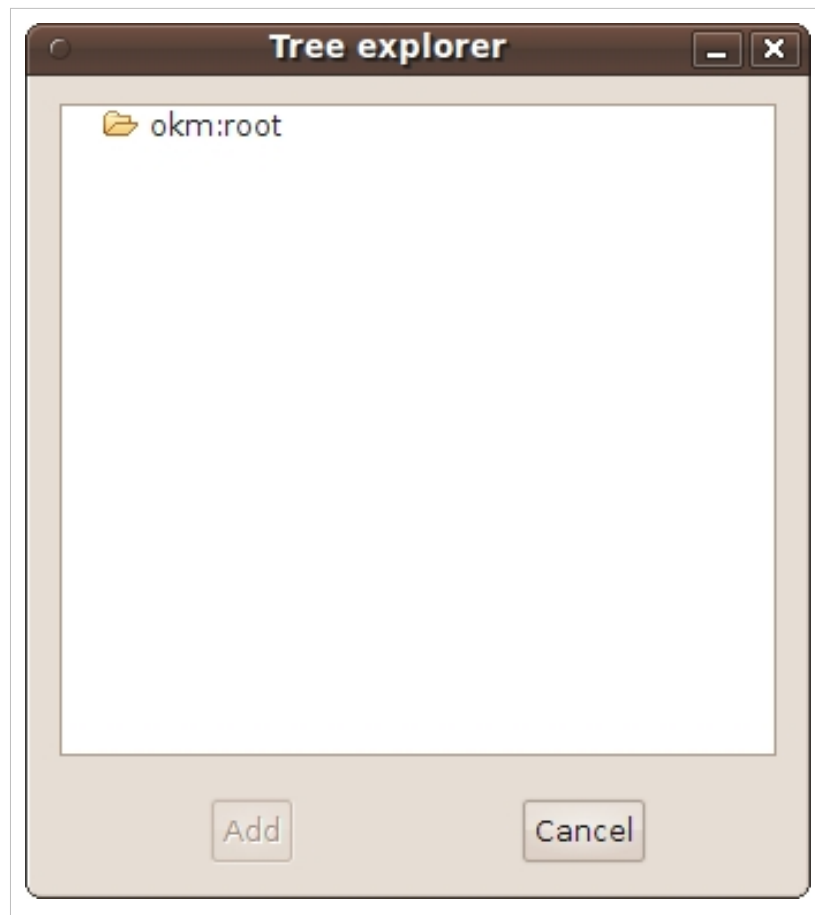


When you set your configuration values, a folder called **OpenKM** is created in your user **My documents folder**. In this OpenKM folder, a configuration file called **openkm.xml** and another file called **document.xml** are created that the OpenKM Add-in uses to store some document editing information. You should not edit or delete these files.

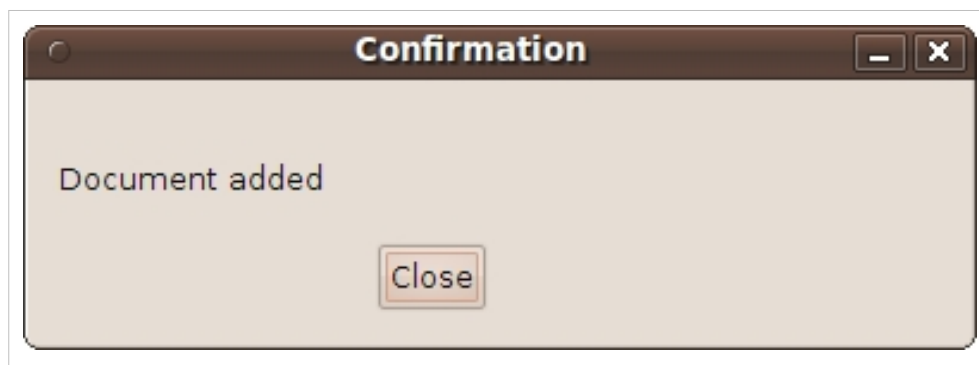


Uploading a new file


Before you begin, make sure the file you wish to upload is a) saved to disk (or OpenKM will throw an error) and b) has the file name you wish it to have within the OpenKM repository otherwise you will have to go through the OpenKM web interface to change the filename (true up to at least OpenKM 5.0)). After clicking on the **add new document** button - , a folder tree window appears. You must select a folder within this window before you are allowed to upload the file.

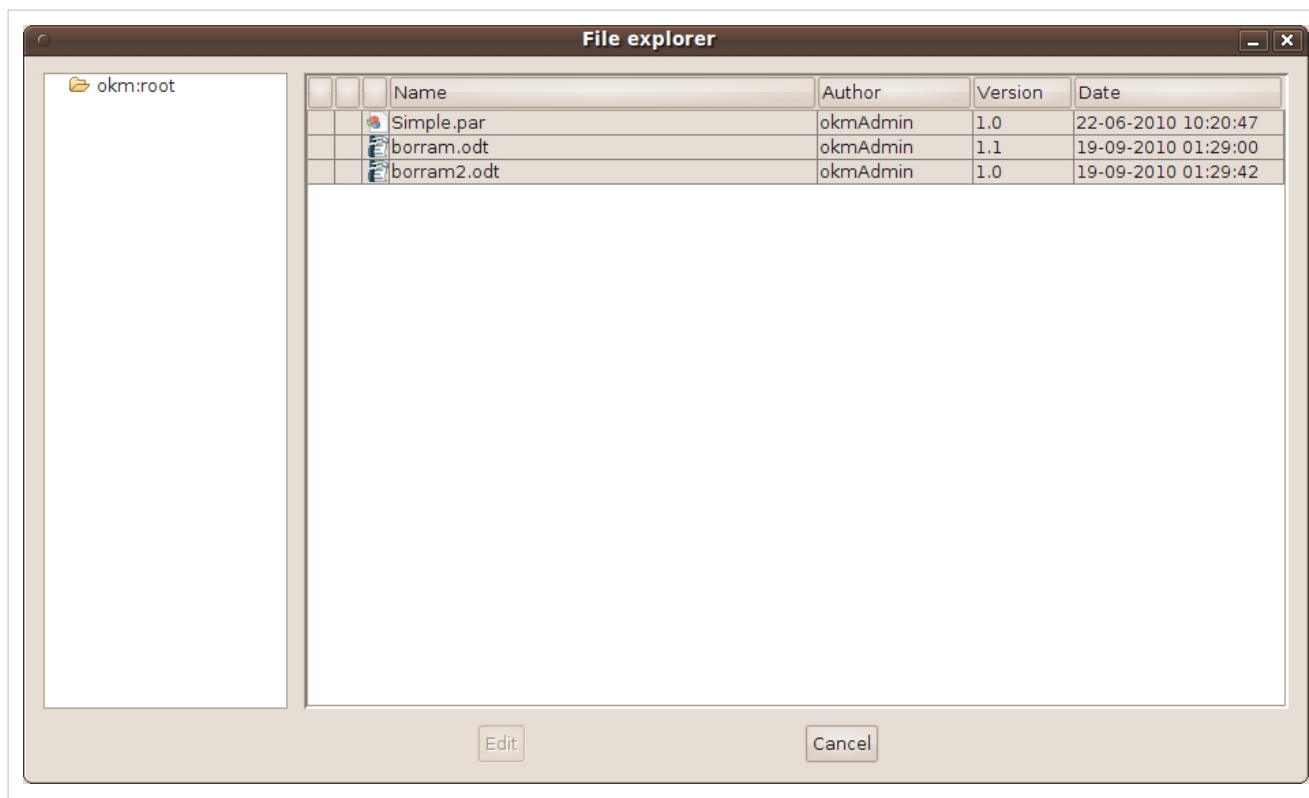




Once you've found the correct folder, highlight it and click the **Add** Button, and the document will be uploaded to OpenKM. Once the process is complete a notification window will pop-up.



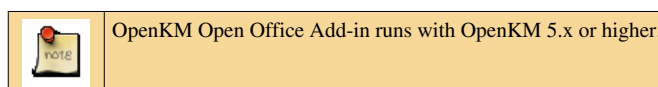
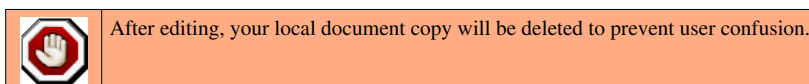
Edit an OpenKM document

After clicking on the  document edit button, a folder navigator will appear. You must navigate across folders and select a document that you want to edit.



When you've got some OpenKM document opened, the  **Upload modified document** (check-in) and  **Cancel document edit** toolbar options will be enabled.

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



Troubleshooting

Linux users must remember to install the following 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:

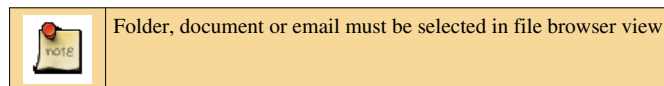
- Only the stapling creator has privileges to add / delete more elements or deleting entire group. Other users only have downloading option.
- Mails can not be downloaded.
- If some users have no rights to download some document in a stapling, although they can see it in the stapling group, they cannot download 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 in the group.


Add new stapling group


First select some folder, document or email.



Click on the  start new stapling group icon (at the bottom right will appear the message "**Stapling started**").


Then select another folder or document and click again on the same icon . Both elements are now stapled.


Continue selecting new elements and clicking on the same icon  to increase the number of elements stapled.

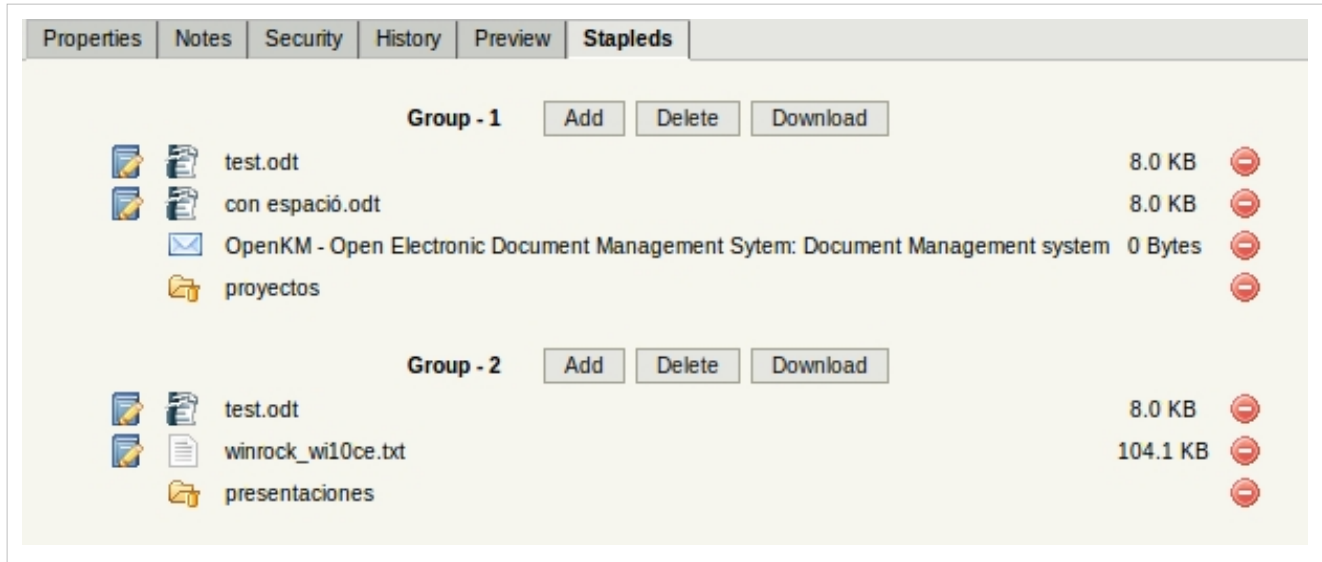
To finish, click on the  stop stapling group icon (at the bottom right will appear the message "**Stapling finished**")

Add more elements to a stapling group

Click on the "Add" button in order to select which group you want to add more elements to (at the bottom right will appear the message "**Stapling started**").

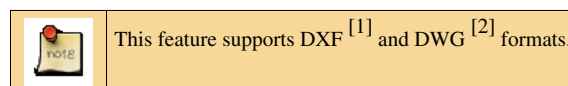
Continue selecting new elements and clicking on the same icon  to increase the number of elements stapled.

To finish, click on the  stop stapling group icon (at the bottom right will appear the message "**Stapling finished**")



Autocad preview

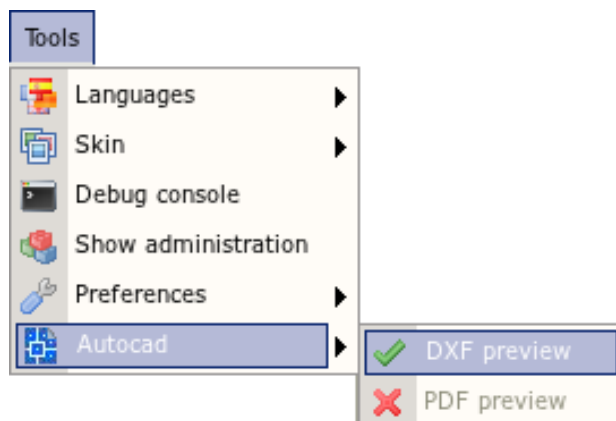
AutoCAD previewer allows one to do some basic operations like zoom in/out, rotate, show/hide layers and print. AutoCAD preview extension allows one to convert AutoCAD files to PDF and preview them or preview DXF files. In the Tools menu, the AutoCAD option allows one to select which preview conversion is enabled.



See also:

- Third-party software integration: Acme CAD Converter
- Application configuration: Autocad previewer

Tools menu



Toolbar



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

File Edit Tools Bookmarks Help

Desktop Search DashBoard Administration

Taxonomy

- okm.root
 - OpenKM
 - presentaciones
 - proyectos
 - test

Categories

Thesaurus

Templates

My documents

E-mail

Trash

Path : /okm.root/

Name	Size	Update date	Author	Version
proyectos		21-07-2010 07:14:33	okmAdmin	
test		02-11-2010 12:25:45	okmAdmin	
Architek-2d.dxf	77.2 KB	08-11-2010 11:39:05	okmAdmin	1.0
con espació.odt	8.0 KB	10-09-2010 10:50:55	okmAdmin	1.0

Properties Notes Security History Preview

Model

Layer

- ☒ 0
- ☒ 1
- ☒ 2
- ☒ 4
- ☒ 5

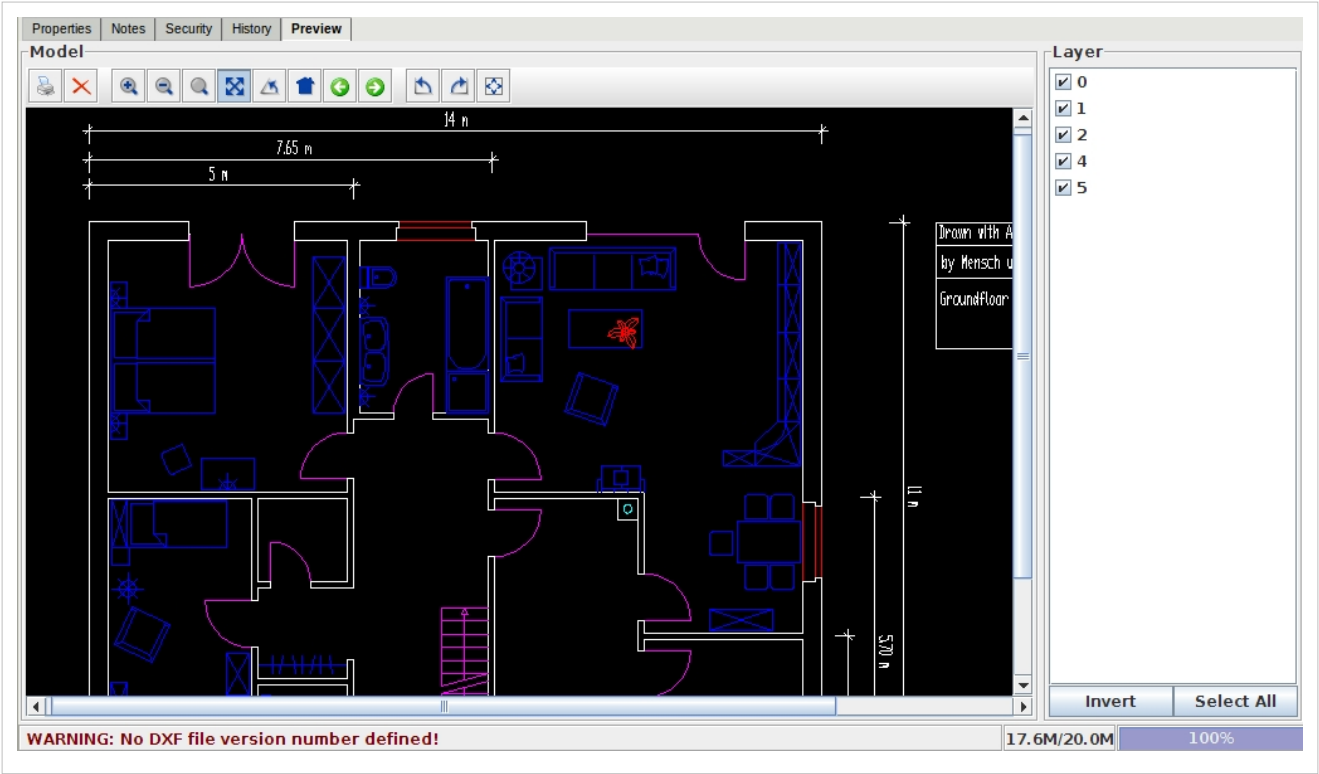
Invert Select All

WARNING: No DXF file version number defined!

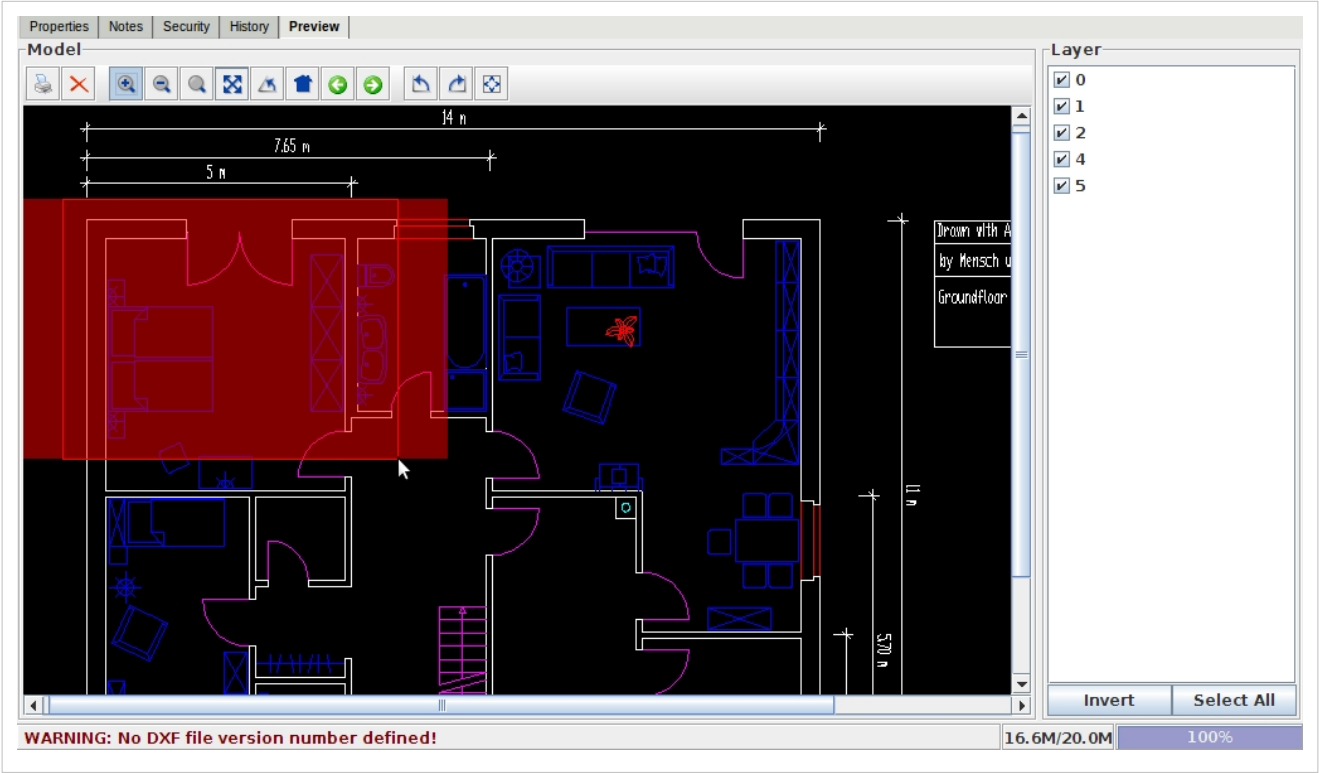
11.0M/21.8M 100%

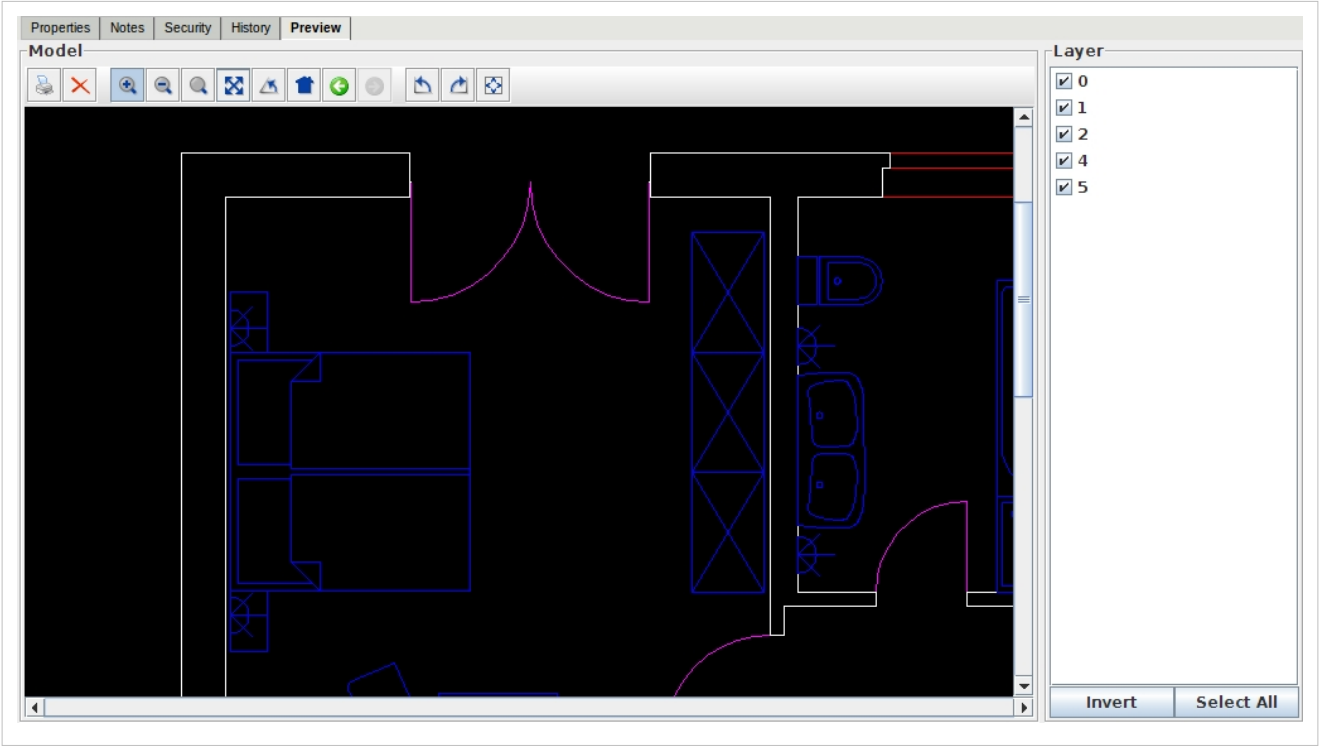
Connected as okmAdmin 166.7 MB 0 22 0 0 0

Default DXF preview

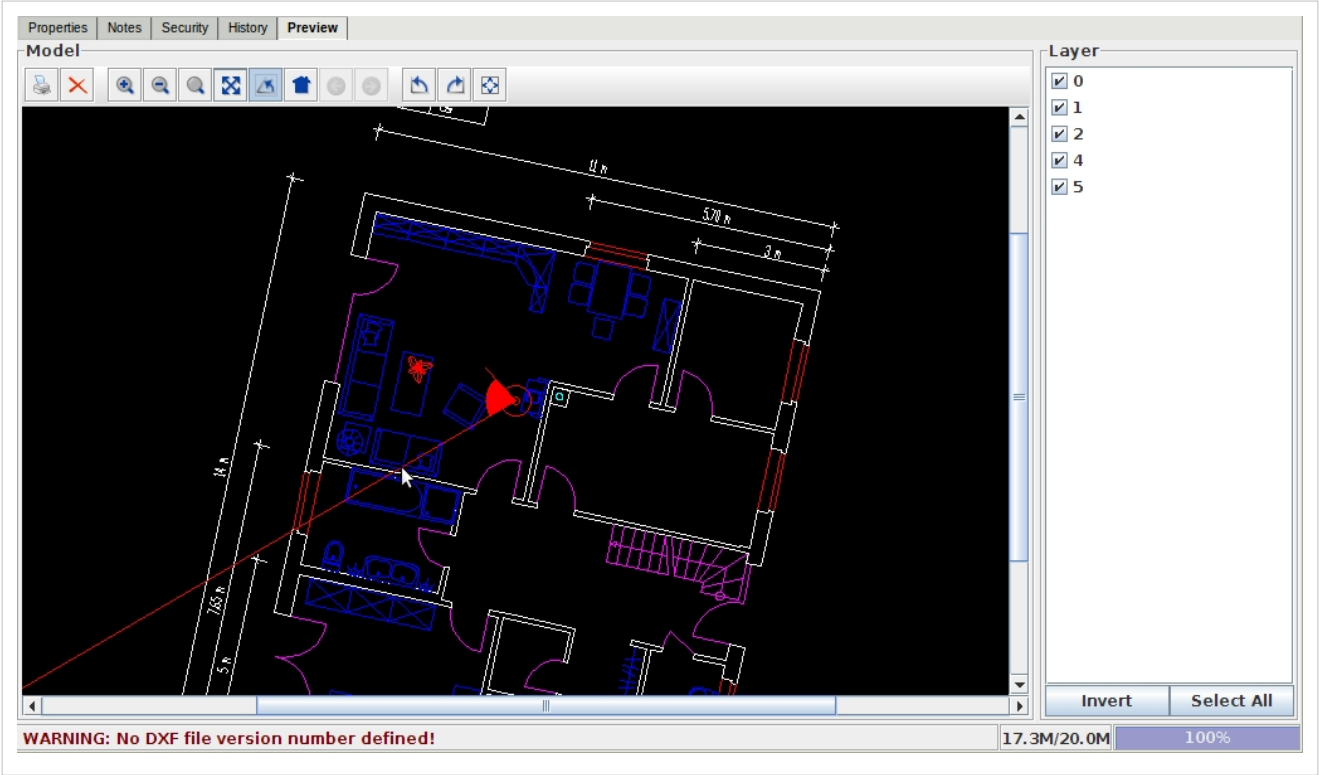


Preview with zoom

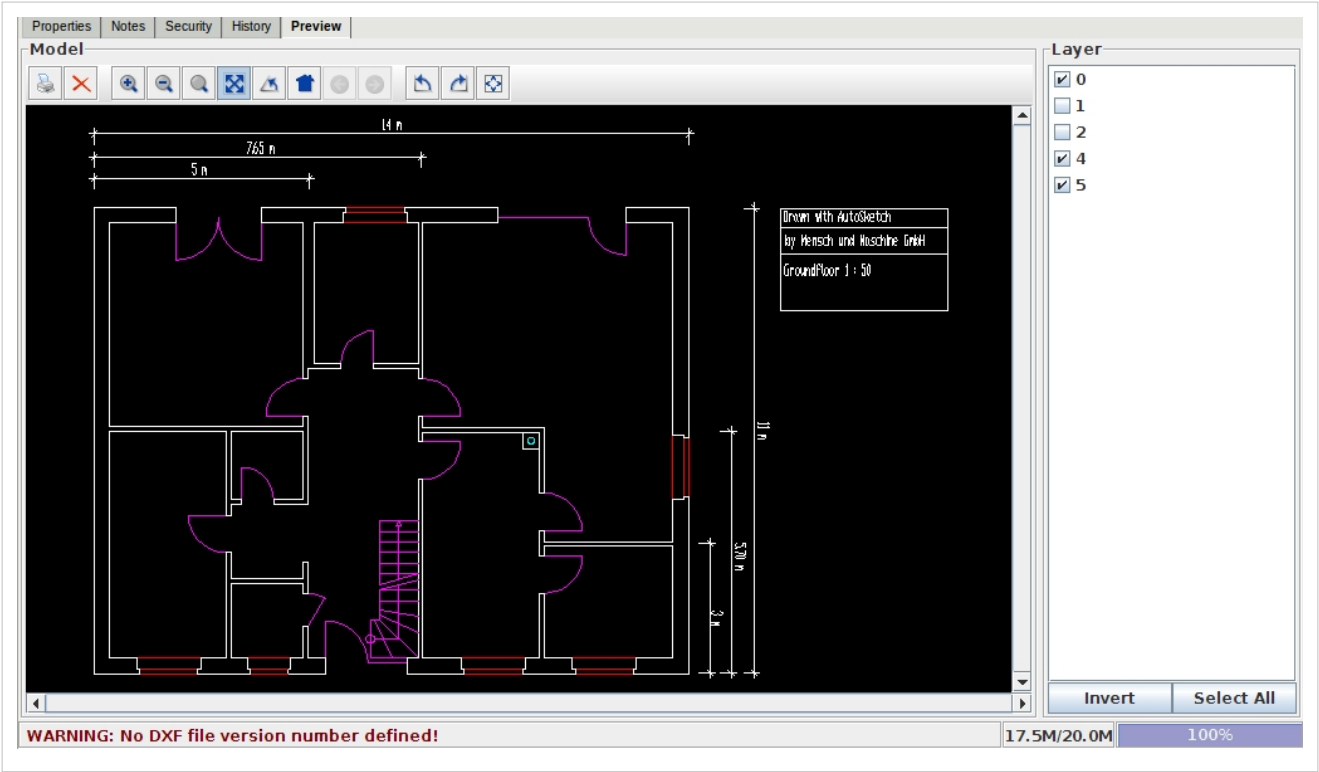




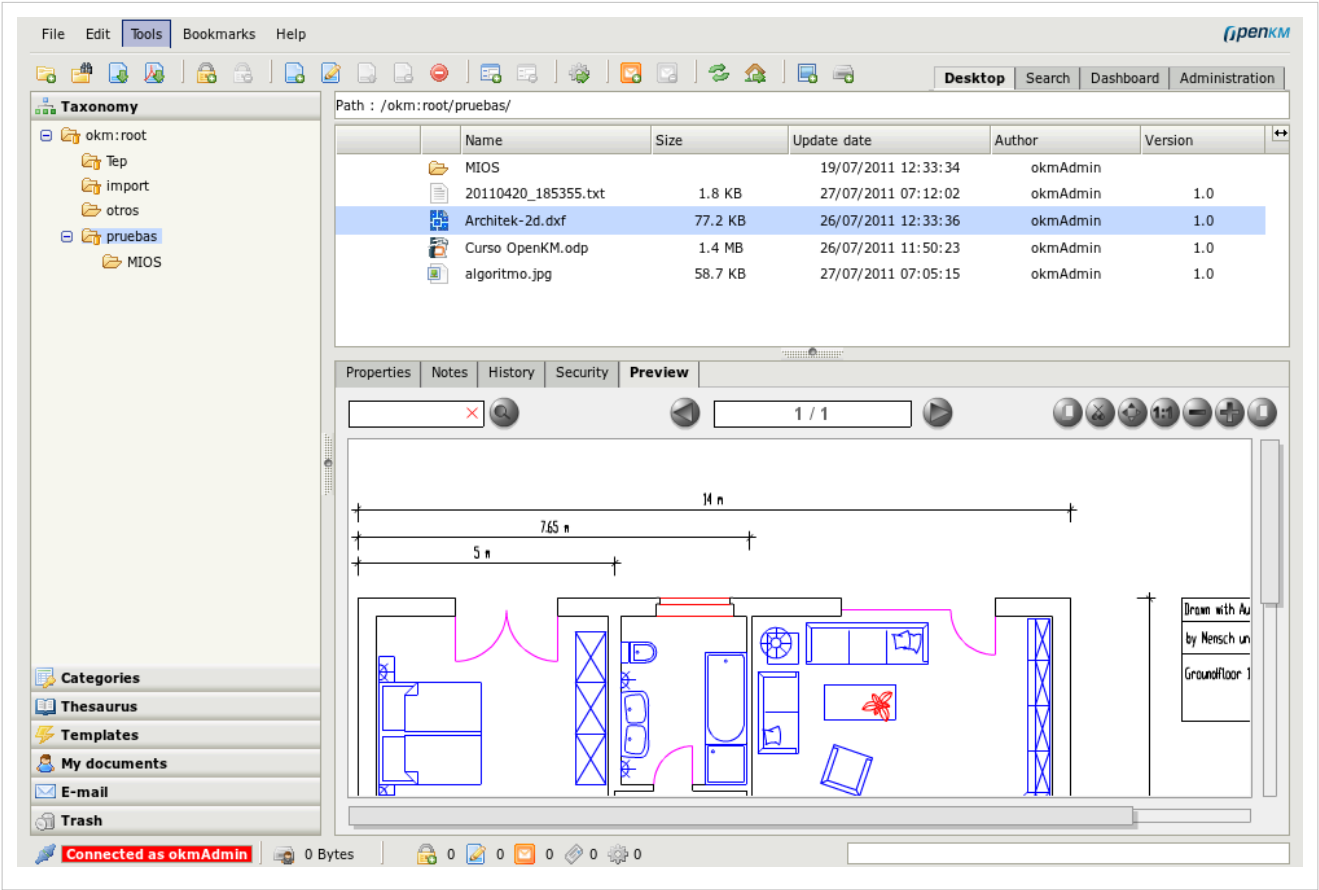
Preview with rotation



Preview hiding layers



Default PDF preview



References

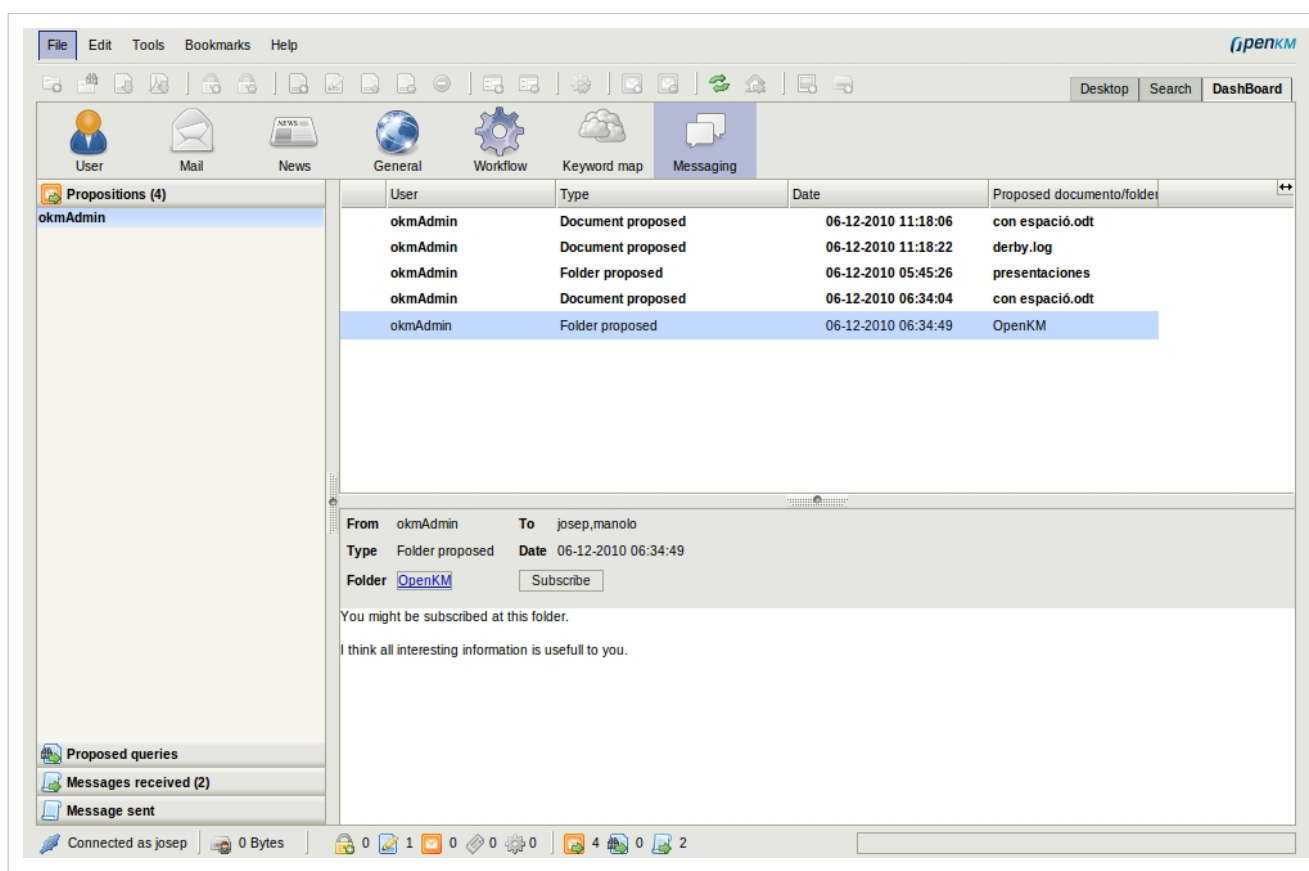
[1] <http://en.wikipedia.org/wiki/DXF>

[2] <http://en.wikipedia.org/wiki/DWG>





Messaging

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


Messaging extension widgets are located on the Tools menu (send message option), on any document / folder view in taxonomy with an icon option to send proposed folder/document subscription, at the bottom of the desktop with tree icons to indicate when new proposed subscriptions, proposed query or user messages have arrived and in dashboard view where all information is available in one view.







Description of the different icon options

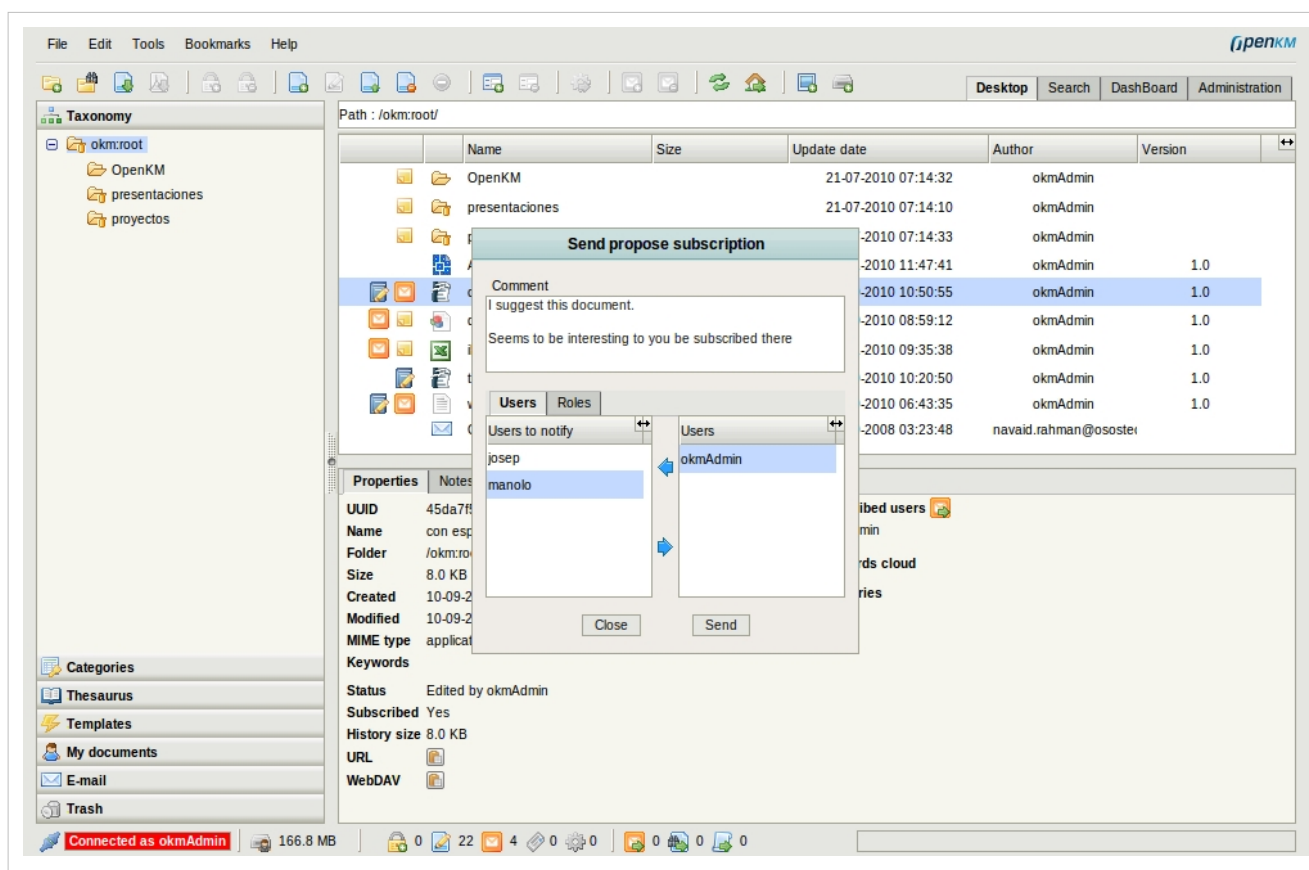
-  → Proposed subscriptions
-  → Proposed query
-  → Message received
-  → Message sent

Proposing subscription

You can propose a subscription (document / folder) to any user or group of users (based on roles). Simply select some document or folder and in the document or folder properties view will appear the propose subscription icon .

Properties	Notes	Security	History	Preview
UUID	45da7f54-7dfa-47e8-85e8-62aff152945b			Subscribed users 
Name	con espaciò.odt			okmAdmin
Folder	/okm:root			Keywords cloud
Size	8.0 KB			Categories
Created	10-09-2010 10:50:54 by okmAdmin			
Modified	10-09-2010 10:50:55 by okmAdmin			
MIME type	application/vnd.oasis.opendocument.text			
Keywords				
Status	Edited by okmAdmin			
Subscribed	Yes			
History size	8.0 KB			
URL				
WebDAV				

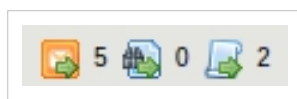
Click on the propose subscription icon , and the propose subscription popup will appear.



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

Proposed subscription notification

At the bottom of the Desktop panel with messaging extensions appears a tree of new icons. Periodically OpenKM indicates to the end user if new messages have arrived.



Clicking on the proposed subscription icon (at bottom), OpenKM automatically opens messaging view. In propositions tab, the proposed subscriptions are ordered by the users who have sent them.

End user proposed subscription received

In Dashboard view, the end user can take advantage of OpenKM proposed subscriptions received from other users. On selecting some proposed subscription, you've got several options. Clicking on the folder or document link will go to the document or folder desktop location or simply pressing the subscribe option to make the subscription (An icon will appear to indicate you've already done this operation). You can also delete a proposed subscription (single) or all proposed subscriptions with appropriate contextual menus in the stack and explorer panels.

FileEditToolsBookmarksHelp

User

Mail

News

General

Workflow

Keyword map

Messaging

Propositions (4)

okmAdmin

Proposed queries

Messages received (2)

Message sent

DesktopSearchDashBoard

User	Type	Date	Proposed documento/folder
okmAdmin	Document proposed	06-12-2010 11:18:06	con espació.odt
okmAdmin	Document proposed	06-12-2010 11:18:22	derby.log
okmAdmin	Folder proposed	06-12-2010 05:45:26	presentaciones
okmAdmin	Document proposed	06-12-2010 06:34:04	con espació.odt
okmAdmin	Folder proposed	06-12-2010 06:34:49	OpenKM
okmAdmin	Document proposed	07-12-2010 09:16:03	con espació.odt

FromokmAdminTojosep,manolo

TypeDocument proposedDate07-12-2010 09:16:03

Documentcon espació.odtSubscribe

I suggest this document.

Seems to be interesting to you be subscribed there

Connected as josep0 Bytes

0

1

1

0

0

4

0

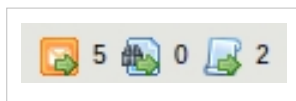
2


User	Type	Date	Proposed documento/folder
okmAdmin	Document proposed	06-12-2010 11:18:06	con espació.odt
okmAdmin	Document proposed	06-12-2010 11:18:22	derby.log
okmAdmin	Folder proposed	06-12-2010 05:45:26	presentaciones
okmAdmin	Document proposed	06-12-2010 06:34:04	con espació.odt
okmAdmin	Folder proposed	06-12-2010 06:34:49	OpenKM
okmAdmin	Document proposed	07-12-2010 09:16:03	con espació.odt

Delete

Proposed query notification

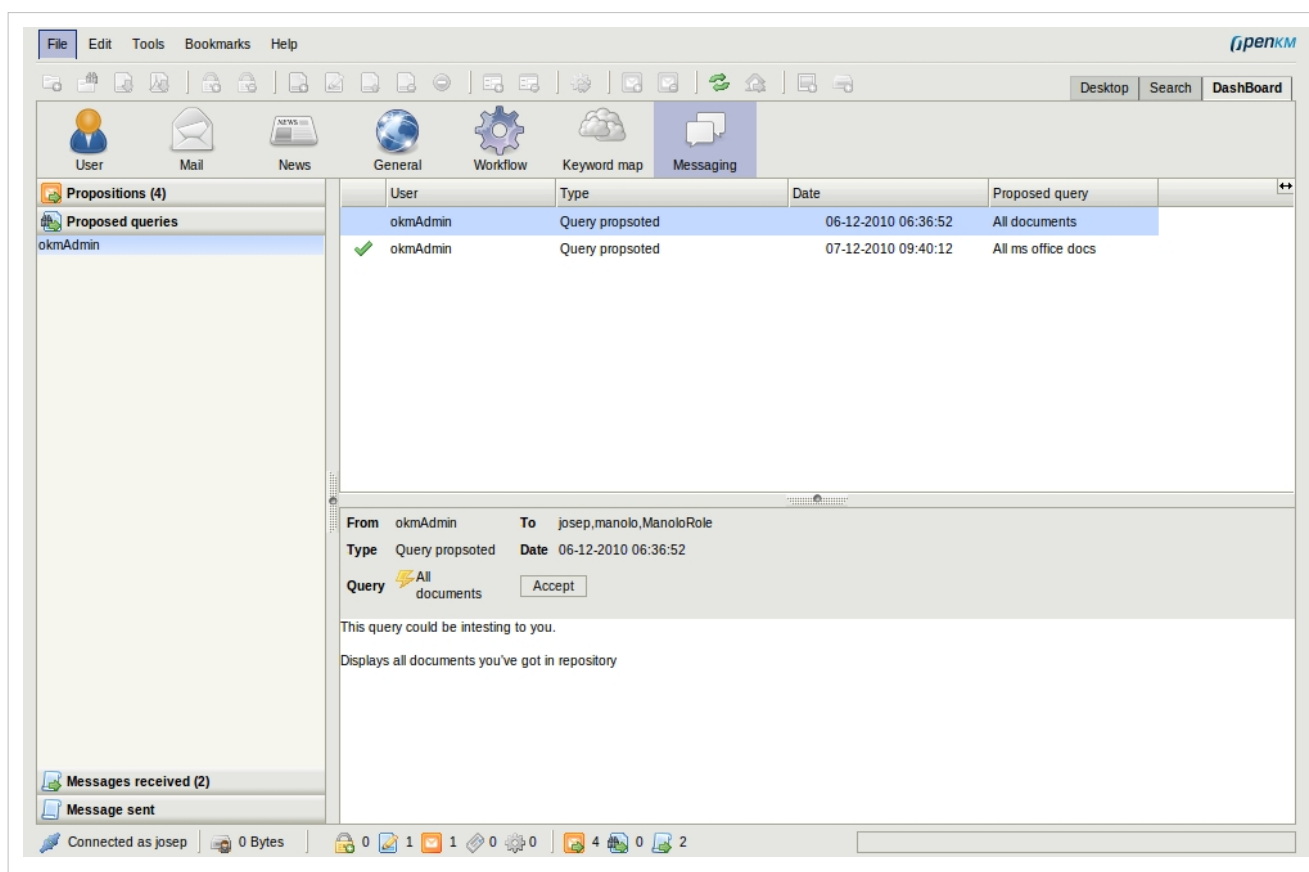
At the bottom of the Desktop panel with messaging extensions appears a tree of new icons. Periodically OpenKM indicates to the end user if new messages have arrived.

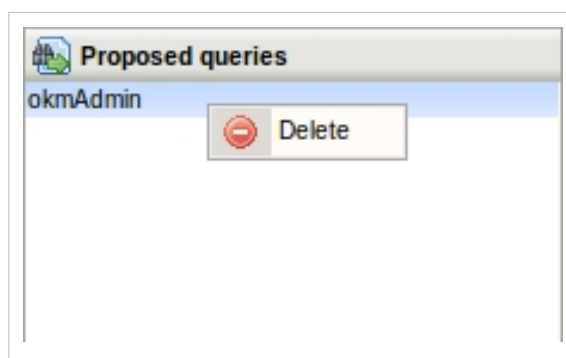



Clicking on the proposed query icon  (at bottom) makes OpenKM automatically open messaging view. In the proposed queries tab, the proposed queries are ordered by the users who have sent them.

End user proposed queries received

In Dashboard view, the end user can take advantage of OpenKM proposed queries received from other users. On selecting some proposed query you've got several options. Clicking on the query link will execute the query in search view (here, for example you can save as own) or simply pressing accept option to accepting the shared query (An icon will appear to indicate you've already done this operation). You can also delete a proposed query (single) or all proposed queries with appropriate contextual menus in the stack and explorer panels.





When the end user accepts a proposed query, this will appear in search view with the shared query icon . The user who proposed the query can modify it, meaning any change made by the owner of the query has immediate effects on users with whom he's sharing.

The screenshot shows the openKM application window. The top menu bar includes File, Edit, Tools, Bookmarks, and Help. The top toolbar contains various icons for file operations. The left sidebar shows 'Stored searches' with 'All ms office docs' selected. The main area displays search filters and results.

Search Filters:

- Context: Taxonomy
- Content: [Empty field]
- Name: ***
- Keywords: [Empty field]
- Folder: [Empty field]
- Category: [Empty field]
- Type: ☒ Document ☐ Folder ☐ Mail
- Mime type: MS Word
- User: [Empty field]
- Date range between: [Empty field] and [Empty field]
- Page results: 10
- ☒ Advanced search
- Save as user news: ☐
- Save search: [Empty field]
- Clean Search Results: 54

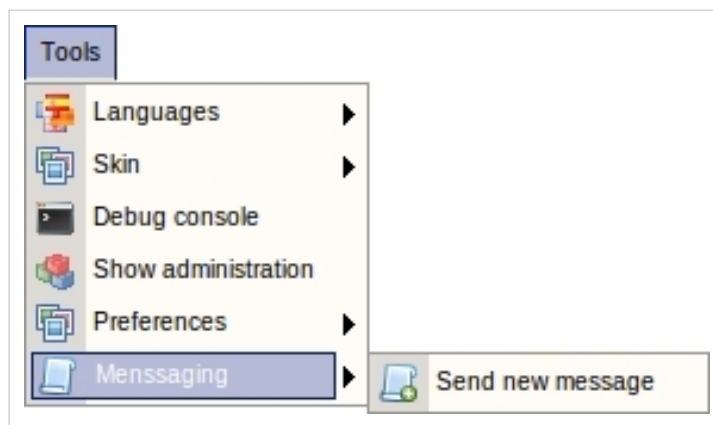
Search Results Table:

Relevance	Name	Size	Update date	Author	Version
★★★★★	MODELO ACUERDO LICENCI	192.5 KB	21-07-2010 07:15:08	okmAdmin	1.0
★★★★★	2.3 Descripción de los Servicio	33.0 KB	21-07-2010 07:15:12	okmAdmin	1.0
★★★★★	el nuevo papel de los intermec	163.0 KB	21-07-2010 07:14:49	okmAdmin	1.0
★★★★★	SMS-check-list-form.doc	89.0 KB	21-07-2010 07:15:18	okmAdmin	1.0
★★★★★	2.1 Problema u oportunidad.d	1.8 MB	21-07-2010 07:15:11	okmAdmin	1.0
★★★★★	Estudio de Intermedarios turis	100.5 KB	21-07-2010 07:14:54	okmAdmin	1.0
★★★★★	PROPOSTES PLA ESTRATÈC	472.0 KB	21-07-2010 07:15:04	okmAdmin	1.0
★★★★★	2.2 Objetivos del Proyecto.doc	43.5 KB	21-07-2010 07:15:12	okmAdmin	1.0

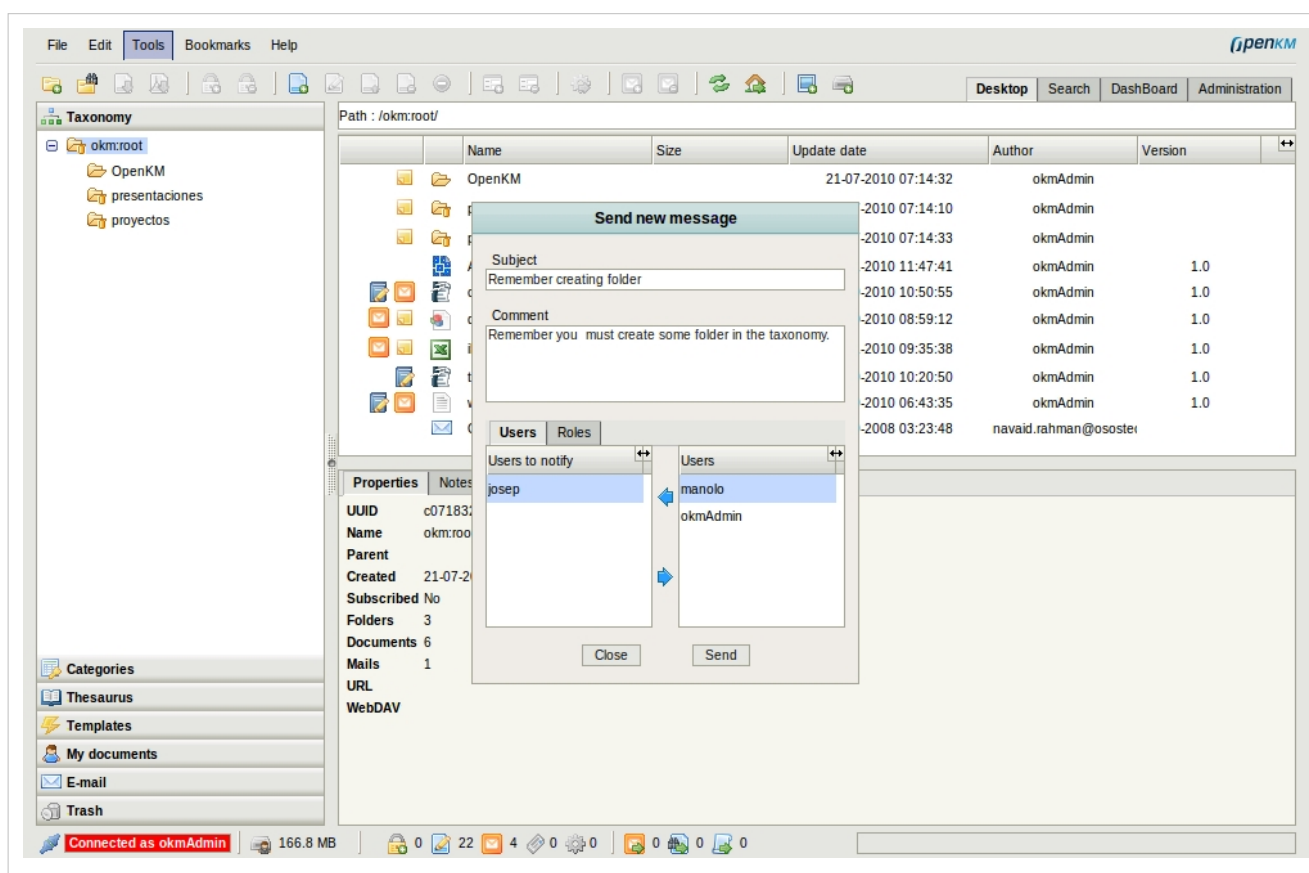
The bottom status bar shows 'Connected as josep', '0 Bytes', and a series of icons representing different file types and counts.

Sending messages

You can send a message to any user or group of users (based on roles). Simply open Tools menu / Messaging and select the option send new message.



The new message popup will appear.




Select users or group of users (by roles) you want to send the message to. They'll receive the notification in the messaging panel.

New message notification

At the bottom of the Desktop panel with messaging extensions appears a tree of new icons. Periodically OpenKM indicates to the end user if new messages have arrived.



Clicking on the new message icon  (at bottom) makes OpenKM automatically open messaging view. In the message received tab, the messages are ordered by the users who have sent them.

End user messages received

In Dashboard view, end users can take advantage of OpenKM messages received from other users. On 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 in the stack and explorer panels.

The screenshot displays the OpenKM Desktop interface. The top menu bar includes File, Edit, Tools, Bookmarks, and Help. The top toolbar contains various icons for file operations. The main window has a sidebar on the left with sections: 'Propositions (4)', 'Proposed queries', and 'Messages received (2)'. Under 'Messages received (2)', 'okmAdmin' is selected. The main pane shows a table of messages:

Sent from	Type	Date	Subject
okmAdmin	Message sent	06-12-2010 11:18:40	mira que ve el asunto
okmAdmin	Message sent	06-12-2010 06:35:56	Remember
okmAdmin	Message sent	07-12-2010 10:23:33	Remember creating folder

Below the table, the details of the selected message are shown:

From: okmAdmin **To:** josep
Type: Message sent **Date:** 07-12-2010 10:23:33
Subject: Remember creating folder

The message body text is: "Remember you must create some folder in the taxonomy."

The bottom status bar shows 'Connected as josep' and '0 Bytes'. The bottom toolbar contains various icons and counts: 0, 1, 1, 0, 0, 4, 0, 2.

Sent from	Type	Date	Subject	
okmAdmin	Message sent	06-12-2010 11:18:40	mira que ve el asunto	
okmAdmin	Message sent	06-12-2010 06:35:56	Remember	
okmAdmin	Message sent	07-12-2010 10:23:33	Remember creating folder	

User messages sent view

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

The screenshot displays the OpenKM application's 'Messaging' view. The interface features a menu bar (File, Edit, Tools, Bookmarks, Help) and a toolbar. The sidebar on the left contains navigation icons for User, Mail, News, General, Workflow, Keyword map, and Messaging. The main pane shows a list of messages sent, with columns for Send to, Type, Date, and Subject. A message from 'okmAdmin' to 'josep,TestRole' is highlighted. Below the list, the details of the selected message are shown, including the subject 'Remember' and the body text 'You must remember creating new folder structure in OpenKM taxonomy node.' The status bar at the bottom indicates 'Connected as okmAdmin' and shows system icons.

Send to	Type	Date	Subject
okmAdmin	Document proposed	06-12-2010 11:18:06	con espació.odt
okmAdmin	Folder proposed	06-12-2010 05:45:26	presentaciones
okmAdmin	Document proposed	06-12-2010 06:34:04	con espació.odt
okmAdmin	Folder proposed	06-12-2010 06:34:49	OpenKM
josep,TestRole	Message sent	06-12-2010 06:35:56	Remember
okmAdmin	Query propsoled	06-12-2010 06:36:52	All documents
okmAdmin	Document proposed	07-12-2010 09:16:03	con espació.odt
okmAdmin	Query propsoled	07-12-2010 09:40:12	All ms office docs
josep	Message sent	07-12-2010 10:23:33	Remember creating folder

From okmAdmin **To** josep,TestRole
Type Message sent **Date** 06-12-2010 06:35:56
Subject Remember
 You must remember creating new folder structure in OpenKM taxonomy node.

Send to	Type	Date	Subject	
okmAdmin	Document proposed	06-12-2010 11:18:06	con espació.odt	
okmAdmin	Folder proposed	06-12-2010 05:45:26	presentaciones	
okmAdmin	Document proposed	06-12-2010 06:34:04	con espació.odt	
okmAdmin	Folder proposed	06-12-2010 06:34:49	OpenKM	
josep,TestRole	Message sent	06-12-2010 06:35:56	Remember	
okmAdmin	Query proposed	06-12-2010 06:36:52	All documents	
okmAdmin	Document proposed	07-12-2010 09:16:03	con espació.odt	
okmAdmin	Query proposed	07-12-2010 09:40:12	All ms office docs	
josep	Message sent	07-12-2010 10:23:33	Remember creating folder	

Downloading restricted buttons

Downloading restricted buttons extension is useful for administrators who want to share documents with external users or some users but without downloading rights.

Enable

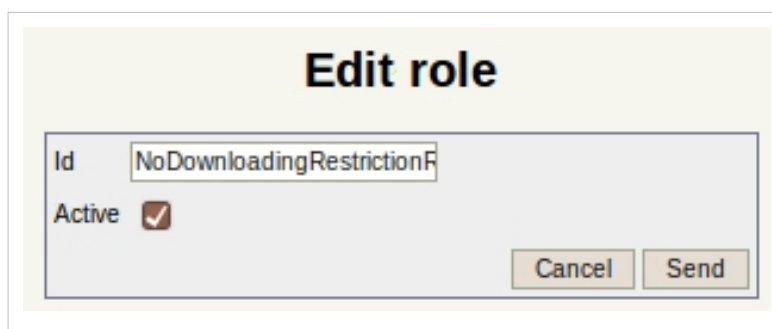
See Community extension section how to enable downloading restricted buttons in your OpenKM.

Description

Downloading restricted buttons is very simple to understand. Any user who doesn't have **NoDownloadingRestrictionRole** cannot download files. That feature must be properly configured in accordance with profiles options where default downloading options might be disabled for all users. The idea is that only some users will have the **NoDownloadingRestrictionRole** and will be able to download any document, if they have rights to it.

Menu file

- Create folder visible ☒
- Find folder visible ☒
- Go folder visible ☒
- Download visible ☐
- Download PDF visible ☐
- Add document visible ☒
- Purge visible ☒
- Purge trash visible ☒
- Restore visible ☒

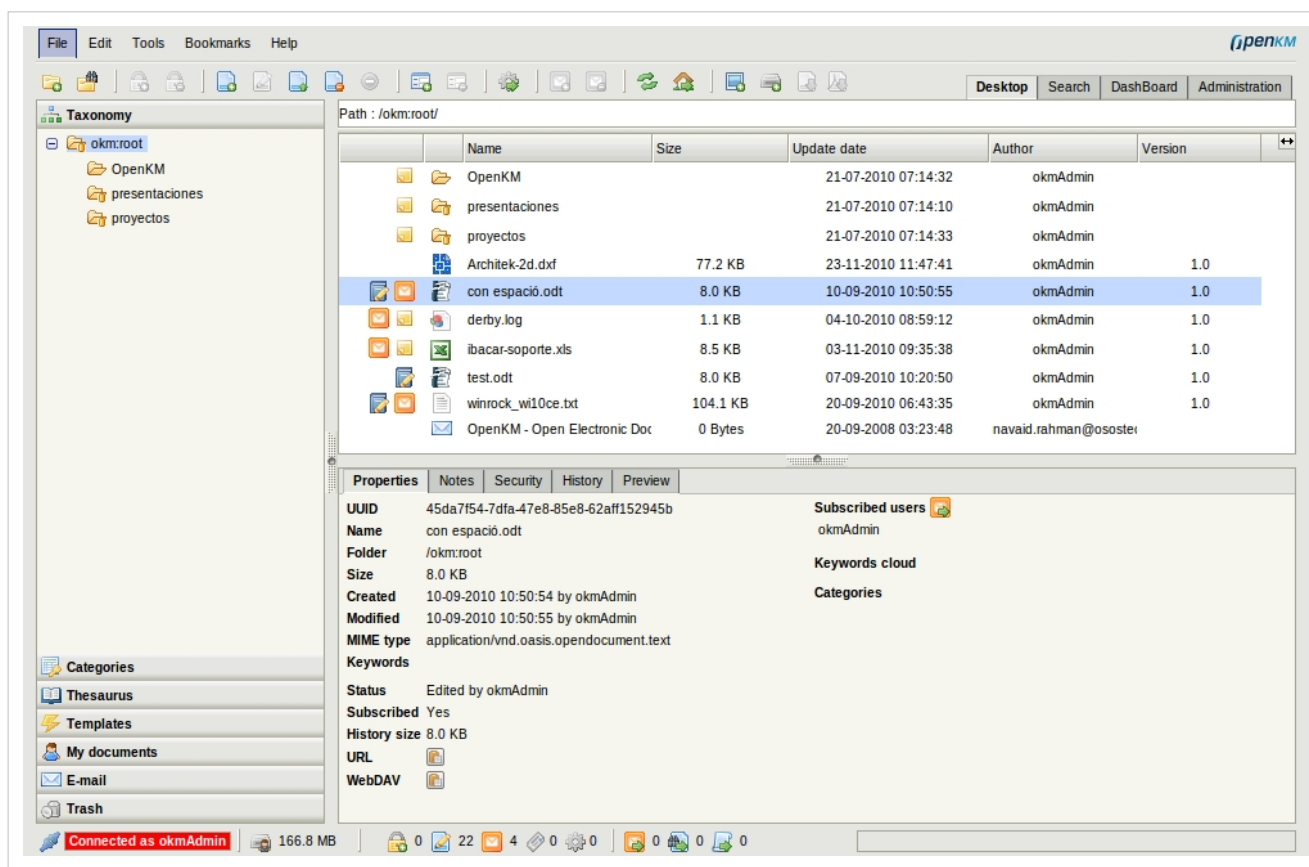


That solves the general problem that in some cases it is desired that some uses can read documents but not download them.

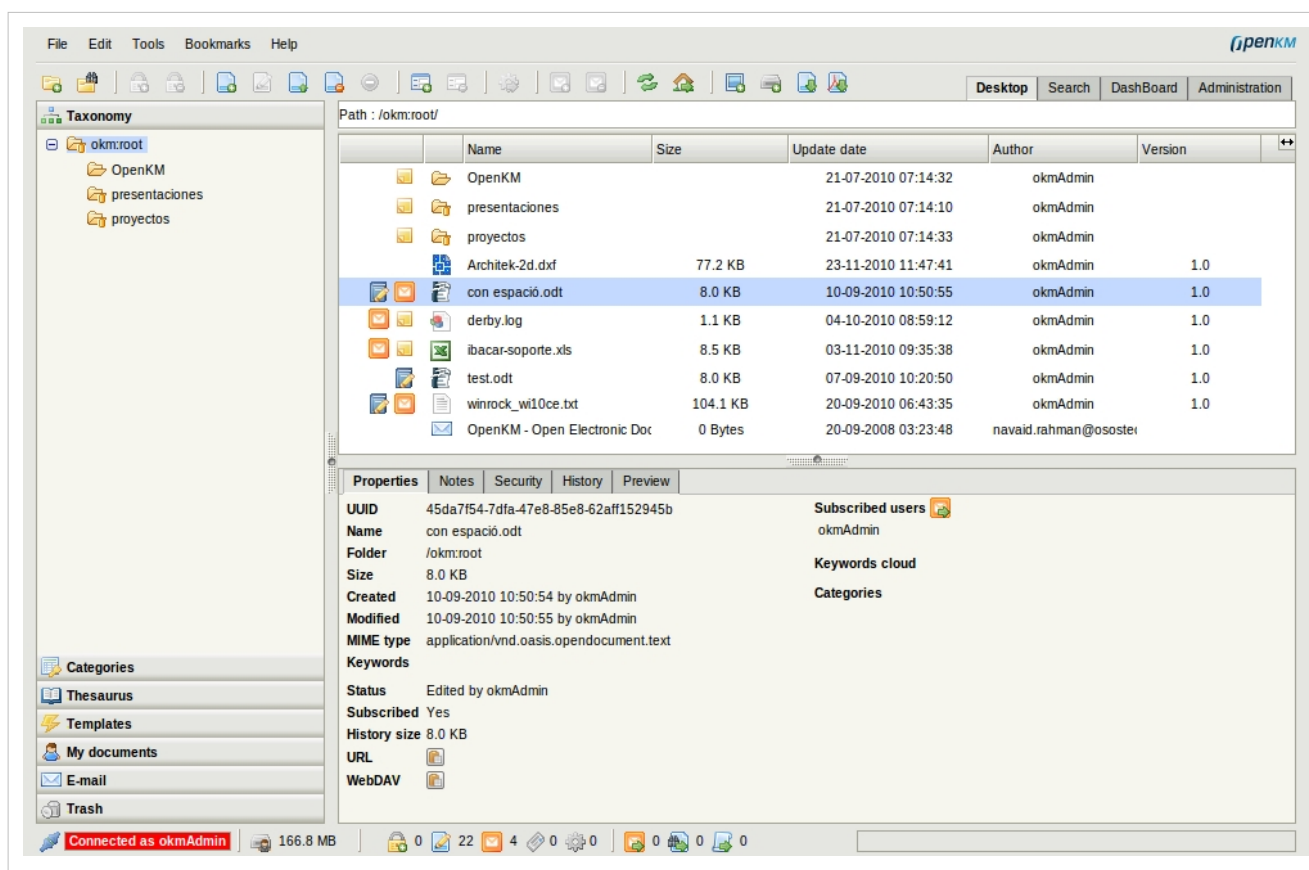
When the extension is enabled, two new buttons will appear on the right of the toolbar.



In the next screenshot, the user doesn't have the role **NoDownloadingRestrictionRole** and that is the reason why they cannot download the file (take a look at the right corner of the toolbar).



In the next screenshot, the user has the role **NoDownloadingRestrictionRole** that in combination with normal rights allows the user to download the file (take a look at the right corner of the toolbar).




Stamp

Stamp is only allowed in taxonomy view for any document which can be converted to PDF or is a PDF. In order to stamp a document it's necessary to have working integration with OpenOffice. Take a look at OpenOffice.org or [Application_configuration](#).


Restrictions:

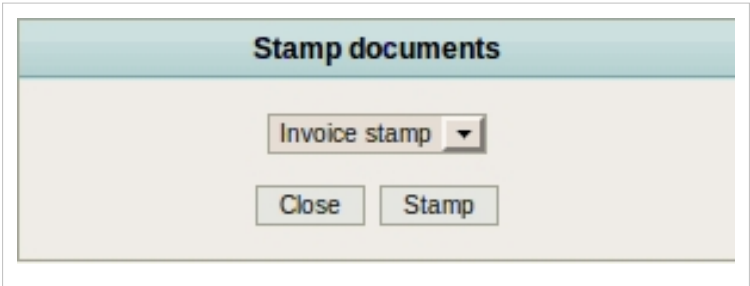
- Only allowed for documents convertible to PDF or PDF files.
- Have write privileges on folder.
- Only allowed on taxonomy view.

Detail of the functions according to their icons:

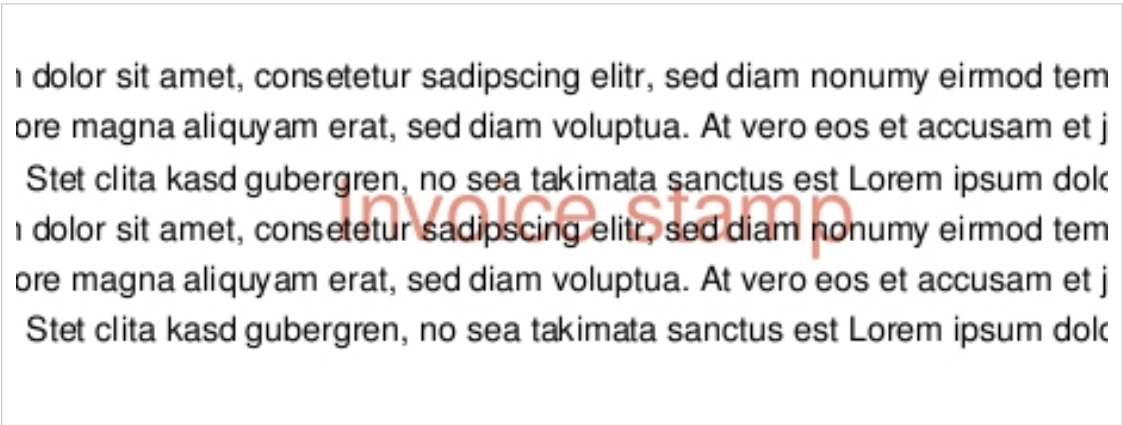
-  → Start stamping a document

Stamping a document

Fist select a document (convertible to PDF or PDF) in taxonomy view, then click  the stamp icon. A popup will appear.



Several stamp types can be assigned in administration view to each user. A user must select one of the available stamps he's got and execute it. After some time, a new PDF file will be generated (or new version PDF file in case the selected stamped file was a PDF).



Stamp administration

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

Text stamp list (Image stamps)						
Name	Description	Text	Color	Users	Active	
Invoice stamp	Invoice stamp	Invoice stamp		okmAdmin		  

You can add new stamps or edit existing ones.

Edit text stamp

Name	Invoice stamp
Description	Invoice stamp
Text	Invoice stamp
Layer	Under content
Opacity	0.5
Size	30
Color	■ #d4290b
Align	Center
Rotation	0
Expr. X	PAGE_CENTER
Expr. Y	PAGE_MIDDLE
Active	<input checked="" type="checkbox"/>
Users	okmAdmin



An **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.

Image stamp list (Text stamps)				
Name	Description	Image	Users	Active
test - image				<input checked="" type="checkbox"/>



In **Expr. X** and **Expr. Y** input fields you can put more than a simple 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 you can edit the actual one.

Edit image stamp

Name	<input type="text" value="test - image"/>
Description	<input type="text"/>
Image	 <input type="text" value=""/> <input type="button" value="Examiner..."/>
Layer	<input type="text" value="Under content"/>
Opacity	<input type="text" value="0.5"/>
Expr. X	<input type="text" value="PAGE_CENTER - IMAGE_WIDTH / 2"/>
Expr. Y	<input type="text" value="PAGE_MIDDLE - IMAGE_HEIGHT / 2"/>
Active	<input type="checkbox"/>
Users	<input type="text" value="okmAdmin"/>

Using the test icon  you can generate a test file.

Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet.

Digital signature

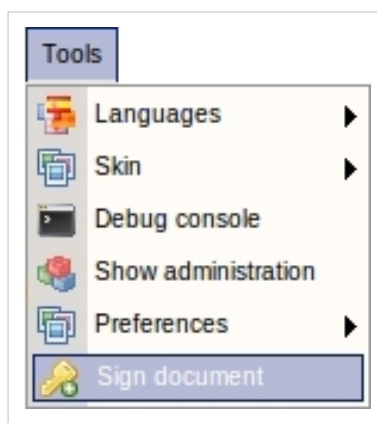
Digital signature allow one to sign documents with installed certificates. You can sign an already uploaded document or a new document. Only documents that can be converted to pdf can be signed. In case document is a pdf, then a new document version is uploaded after signing. In case the document is to be converted, a new pdf file with same name as the original document is uploaded in the same folder as the original.

Restrictions:

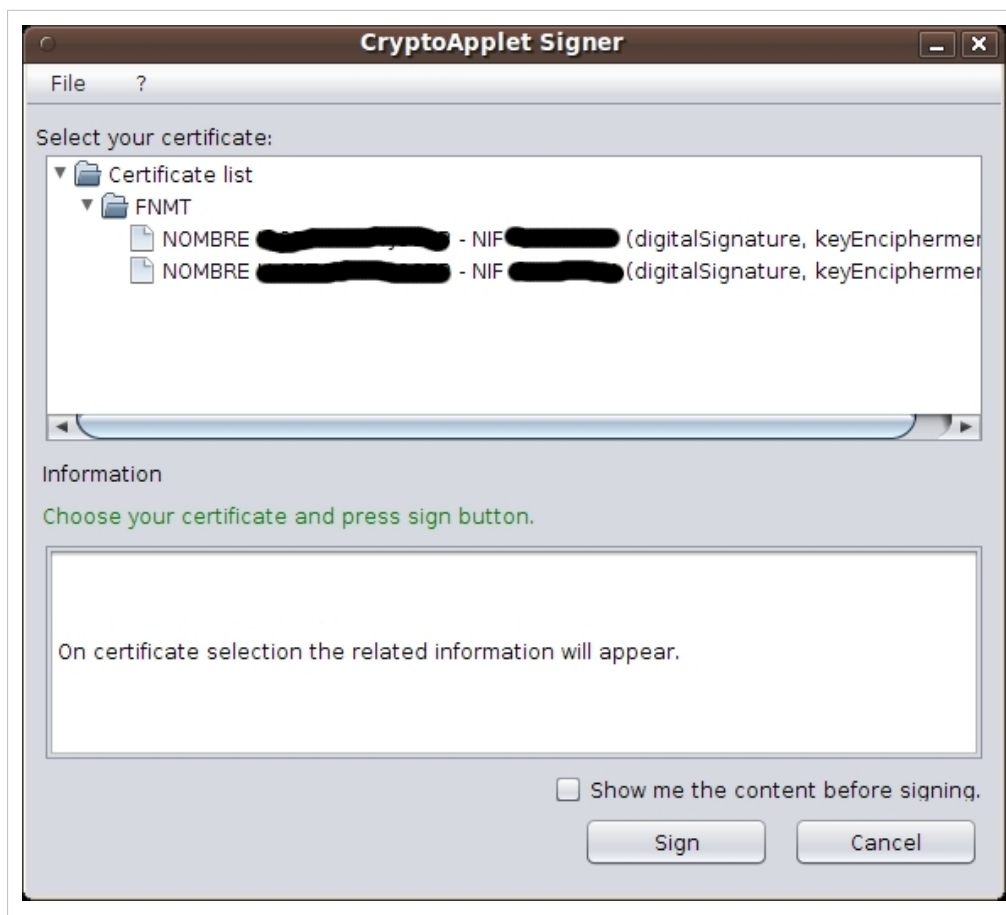
- Only allowed for documents convertible to pdf or pdf files.
- User must have access to insert or upload new file versions.
- Only allowed in taxonomy view.
- **Sign document** is not possible in **add document form** with **import document from ZIP** option.

Sign an existing document

Select a pdf or a convertible file. Go to the Tools menu and select the **sign document** menu option.



A popup will appear. You must select the certificate you want to use to sign the document.



When signing is finished, a popup message will appear.



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

Properties	Notes	History	Security	Preview			
Version	Date	Author	Size			Compact history	Comment
1.1	03-01-2011 09:33:18	okmAdmin	739.0 KB	View			Signed
1.0	03-01-2011 09:33:05	okmAdmin	733.1 KB	View		Restore	

Signing a new document

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

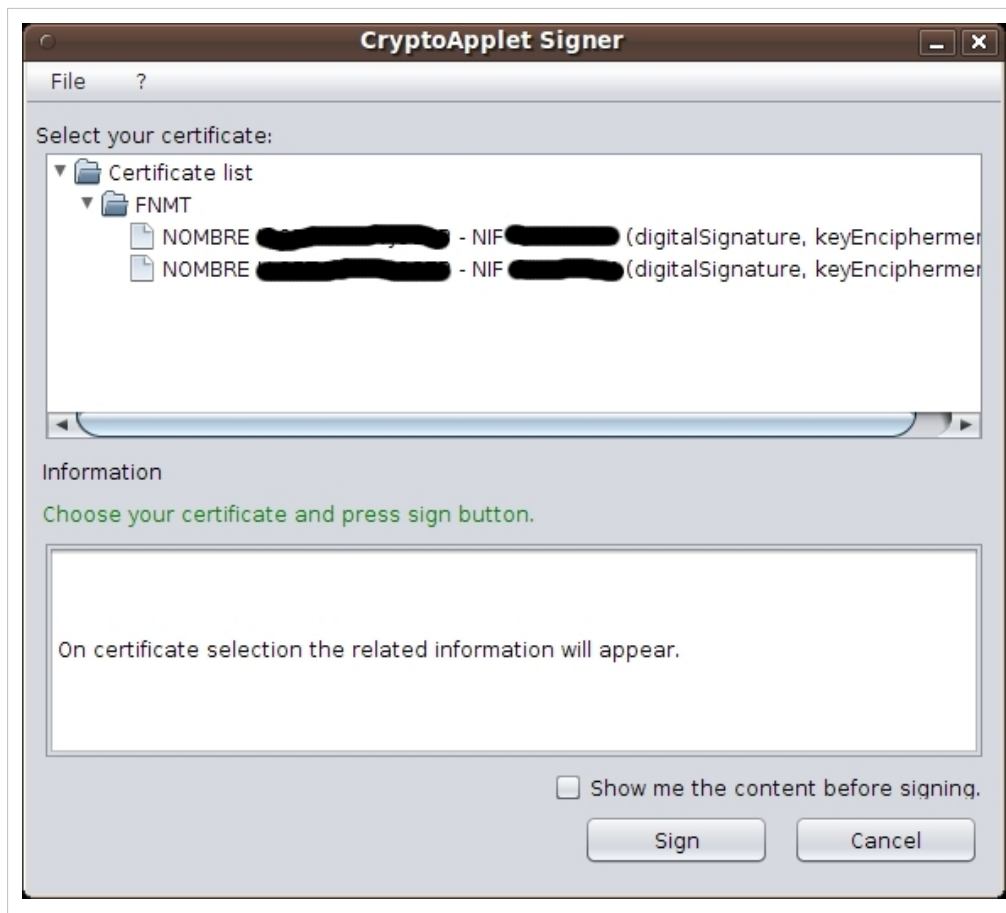
Add new documents

☐ Import Documents from ZIP

☒ Sign document

☐ Notify to users

If a wizard has been defined for the document, a sequence of screens will be available, and the last will be the sign popup.



When signing is finished, a popup message will appear.



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

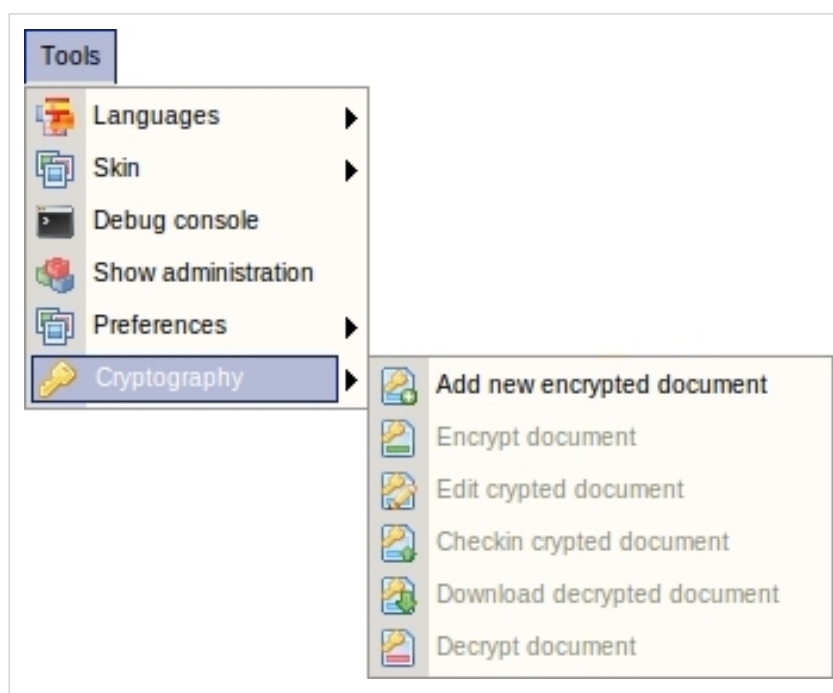
Properties	Notes	History	Security	Preview			
Version	Date	Author	Size			Compact history	Comment
1.1	03-01-2011 09:33:18	okmAdmin	739.0 KB	View			Signed
1.0	03-01-2011 09:33:05	okmAdmin	733.1 KB	View		Restore	

If the document is a pdf, the original document will be uploaded and the signed one will be a new document version. If document is not a pdf but only one convertible to pdf, then that document will be uploaded and a new signed pdf file too.

Document encryption

Cryptography allows for additional document protection in OpenKM. With the cryptography extension, one can upload a new encrypted document, encrypt and decrypt an existing document, edit and check in an encrypted document and download and decrypt encrypted documents. In order to make the cryptography process more secure, files are encrypted and decrypted on the local user computer by a signed applet. That means any networking file traffic is always with encrypted documents.







All Cryptography options are available from the Tools menu:




Restrictions

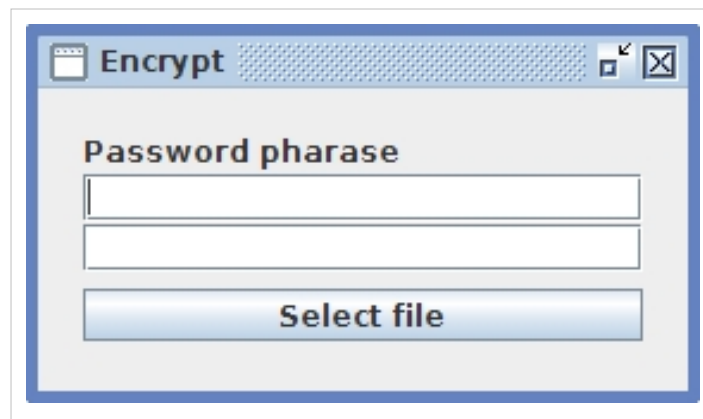
- Cryptography is only allowed in taxonomy view.
- User must have write privileges on document and folder to perform cryptography operations.
- For editing purposes, the document should not be locked or checked out by another user.

Description of different icon options

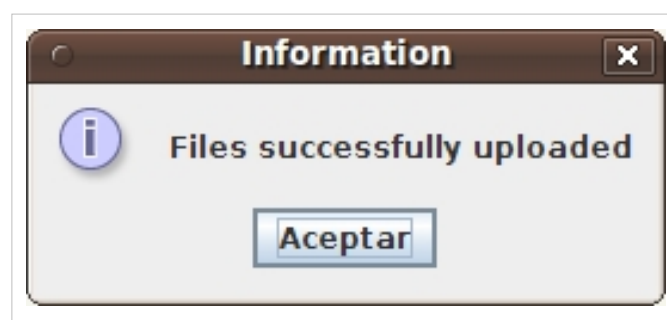
-  → Add new encrypted document
-  → Encrypt document
-  → Edit encrypted document
-  → Checkin encrypted document
-  → Download decrypted document
-  → Decrypt document


Add new encrypted document

First select some folder in the taxonomy where you have write privileges to upload a document. Next, select the  **Add new encrypted document** menu option. An encrypt popup will appear.




Now simply put your cryptophrase twice, and select the file to encrypt by clicking on the **select file** button. After that the document will be encrypted locally with the cryptophrase and then uploaded to OpenKM. When the process is finished, a popup message will appear indicating a successful upload.

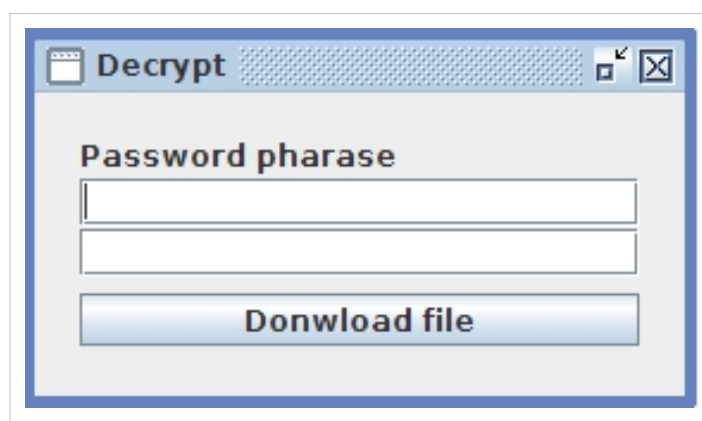


The OpenKM document explorer UI will be refreshed and the newly uploaded document will appear with the cryptography icon  indicating that it's an encrypted document.

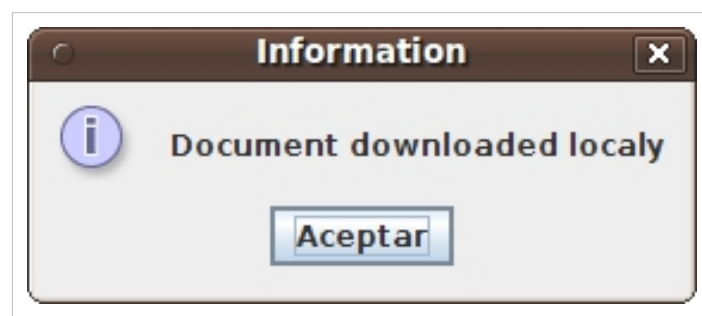
Path : /okm:root/							
	Name	Size	Update date	Author	Version		
	test		11-01-2011 09:32:03	okmAdmin			
	test2		11-01-2011 11:42:10	okmAdmin			
	backup.txt	304 Bytes	12-01-2011 04:34:01	okmAdmin	1.0		

Download decrypted document


This operation downloads an encrypted document and decrypts it locally. First select some encrypted document in OpenKM. Then select the  **Download decrypted document** option and a popup will appear for decrypting the remote OpenKM document.

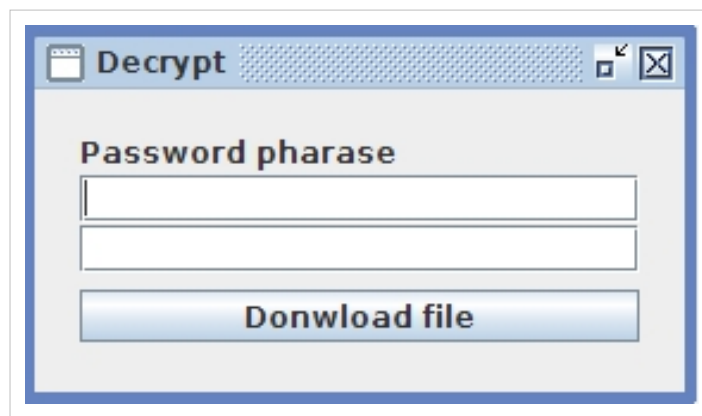


Next, put the decryptphrase and select the directory where you want to download the decrypted version of the OpenKM document. OpenKM will then download the encrypted document to the local computer, decrypt and save. After that an information popup will appear indicating that the document has been saved locally.

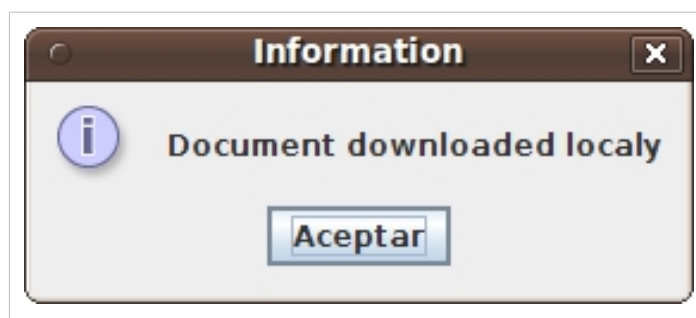


Edit encrypted document

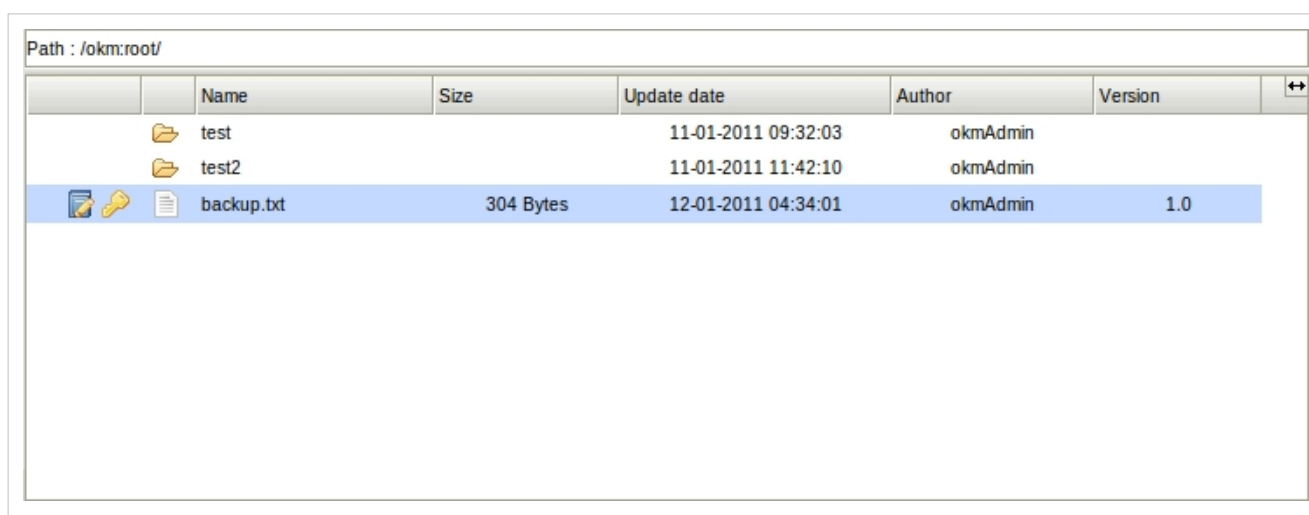
In order to edit an encrypted document, select the  **Edit encrypted document** menu option. A decrypt popup will appear.



Next, put the decryptphrase and select the directory where you want to download the decrypted version of the OpenKM document. OpenKM will then download the encrypted document to the local computer, decrypt and save. After that an information popup will appear indicating that the document has been saved locally.

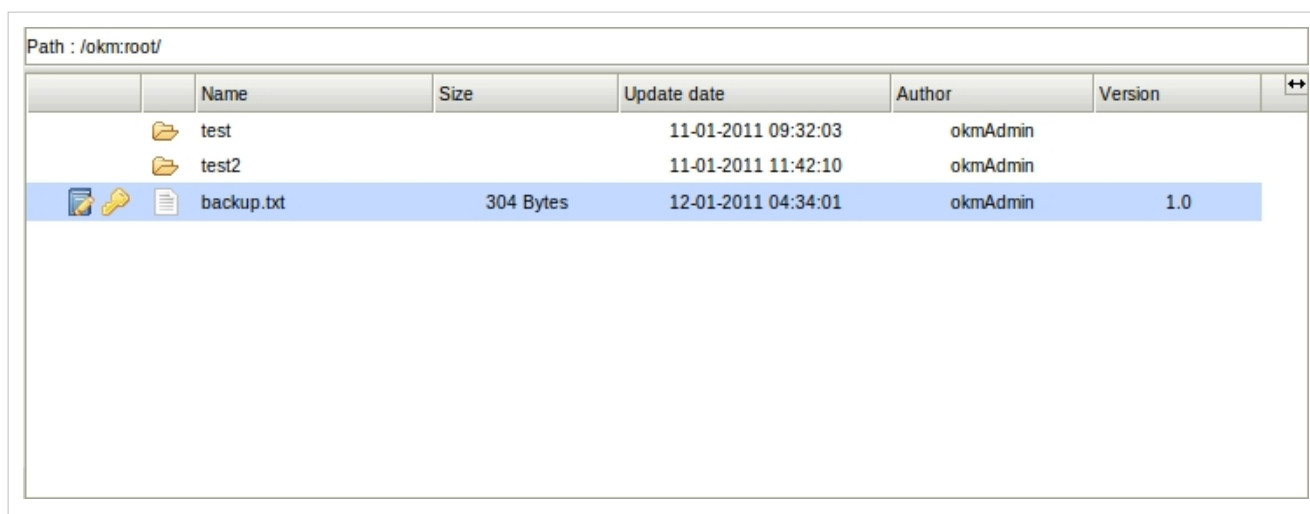


The OpenKM document explorer UI will be refreshed and the document will appear, marked for editing.

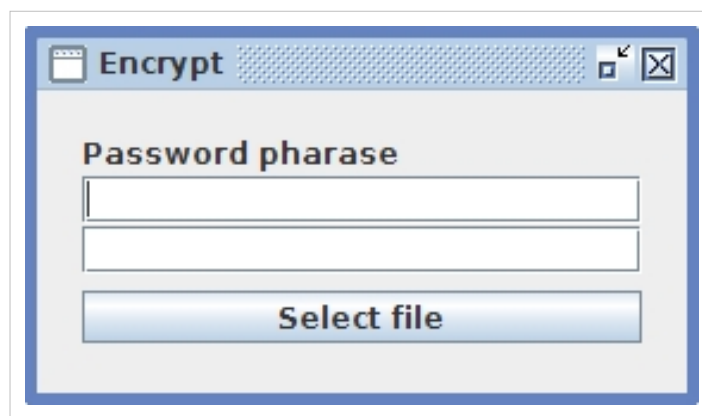


Check-in encrypted document

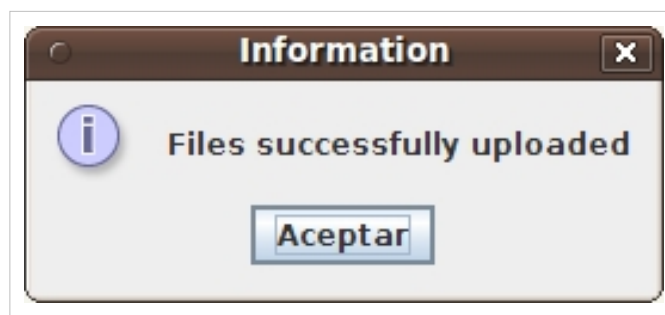
After making changes to the local document (decrypted using **Edit encrypted document** menu option), you must upload a new document version to the OpenKM repository. First select the document that you want to upload to OpenKM.



Then select the  **Checkin encrypted document** menu option. An encrypt popup will appear.



Now simply put your cryptopharase twice, and select the file by clicking on the **select file** button. After that, the document will be encrypted locally with the cryptophrase and then uploaded to OpenKM. When the process is finished, a popup message will appear indicating a successful upload.



The OpenKM document explorer UI will be refreshed and the document will appear as the latest version.

Path : /okm:root/							
	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 04:56:36	okmAdmin	1.1		

Properties	Notes	History	Security	Preview			
Version	Date	Author	Size		Compact history	Comment	
1.1	12-01-2011 04:56:36	okmAdmin	304 Bytes	View			
1.0	12-01-2011 04:34:02	okmAdmin	304 Bytes	View	Restore		



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

Decrypt document

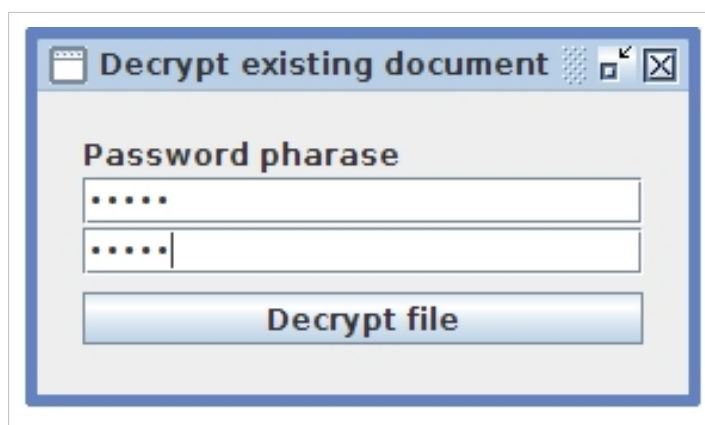
Decrypt document will decrypt an encrypted document in OpenKM and will replace it with a decrypted version. For security reasons all previous encrypted document versions will be removed and replaced with the decrypted document. The encrypted document will be downloaded and decrypted locally, then uploaded to OpenKM and the version history purged.

First select an encrypted document in OpenKM.

Path : /okm:root/							
	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 04:56:36	okmAdmin	1.1		

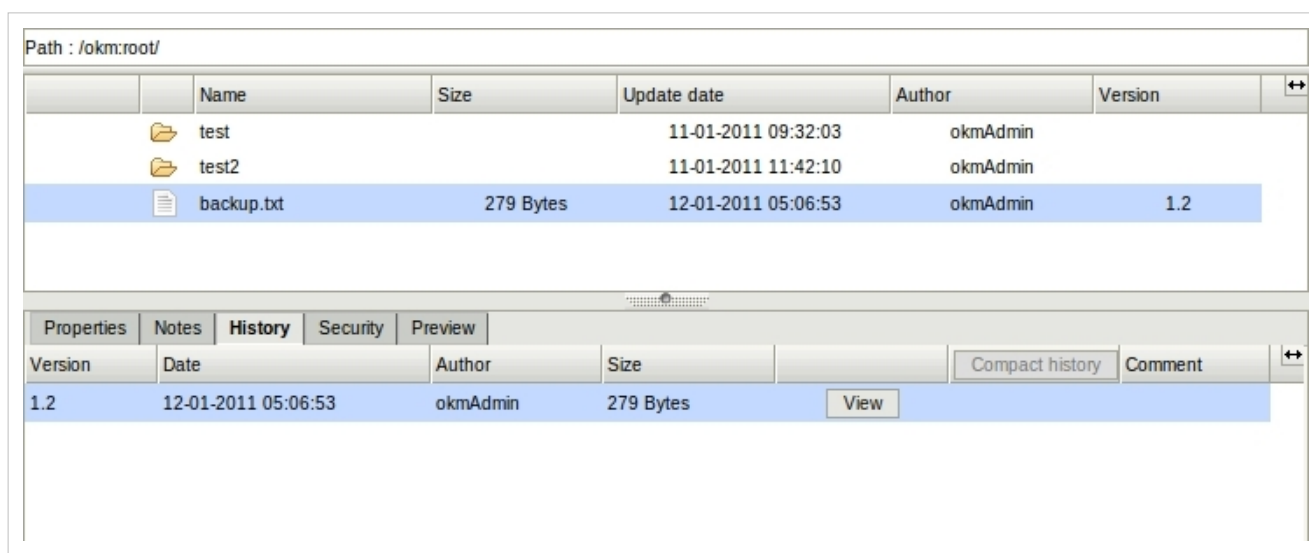
Properties	Notes	History	Security	Preview			
Version	Date	Author	Size		Compact history	Comment	
1.1	12-01-2011 04:56:36	okmAdmin	304 Bytes	View			
1.0	12-01-2011 04:34:02	okmAdmin	304 Bytes	View	Restore		

Then select the **Decrypt document** menu option. A decrypt popup will appear.



Next, put the decryptphrase and select the **Decrypt file** button. The encrypted document will be downloaded and decrypted locally and then uploaded to OpenKM, and version history will be purged too. An information popup will appear indicating that the operation was done successfully.

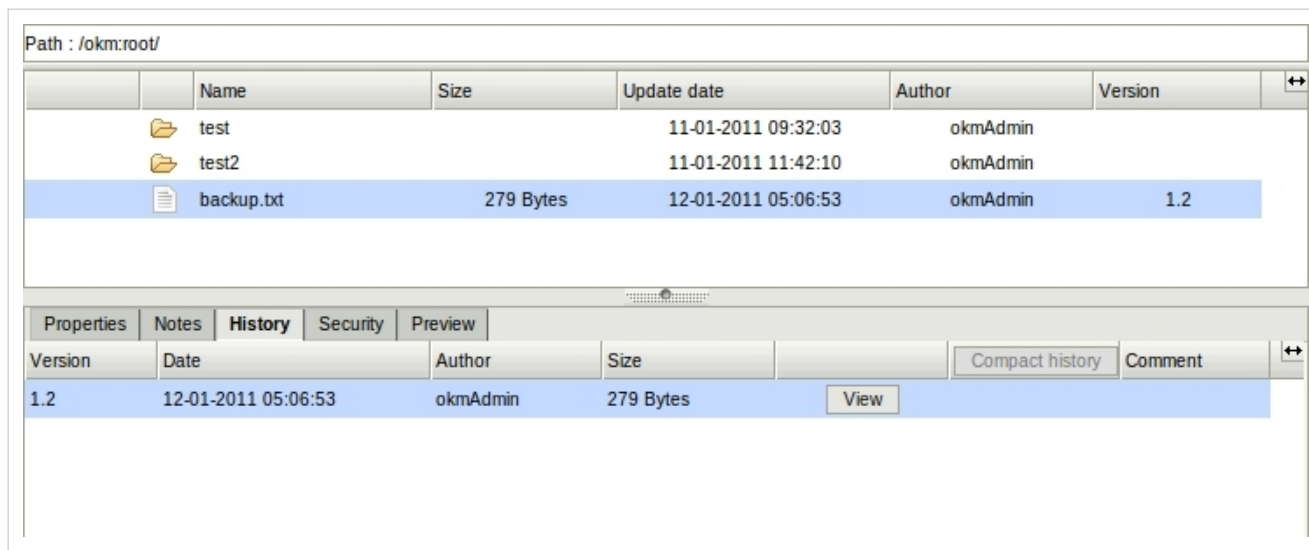
The OpenKM document explorer UI will be refreshed and the decrypted document will appear as the latest version, and with history purged.




Encrypt document

Encrypt document will encrypt some unencrypted document in OpenKM and will replace it with the encrypted version. For security purposes all previous document versions will be removed and replaced with the encrypted document. The OpenKM document will be downloaded and encrypted locally, then uploaded to OpenKM and version history purged.

First select some unencrypted document in OpenKM.



Then select the  **Encrypt document** menu option. The document will be downloaded locally, encrypted, uploaded to OpenKM, and version history purged.



The OpenKM document explorer UI will be refreshed and the encrypted document will appear as the latest version, and with history purged.

Path : /okm:root/							
	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 05:16:55	okmAdmin	1.3		

Properties	Notes	History	Security	Preview			
Version	Date	Author	Size		Compact history	Comment	
1.3	12-01-2011 05:16:55	okmAdmin	304 Bytes	View			





Contacts

Contacts allow you to assign contacts to documents, folders and emails. There are two available options for this. Manage contacts from the Tools menu and assign contacts using the Contacts tab on documents, folder or email view.

Retrictions

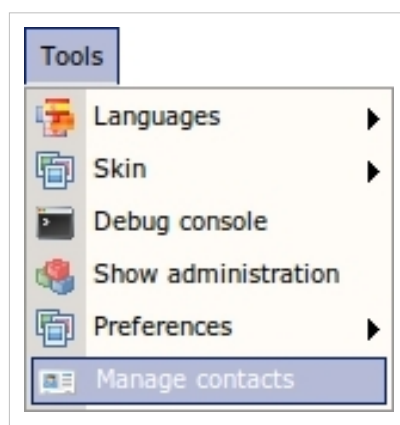
- You need write permissions to add a contact to some document / folder / email.
- You need delete permissions to remove a contact from some document / folder / email.

Description of different icon options

-  → Manage contacts
-  → Add contact
-  → Edit contact
-  → Delete contact

























Manage contacts

Go to the Tools menu and select the option **Manage contacts**.




A popup will appear.

Manage contacts

























Name	Josep Llorc Tella	Carles Ramis	 
Mail	jllort@openkm.com	Francisco José Ávila Bermejo	 
Phone	999 - 888 777	Gaspar Palmer	 
Fax	999 - 999 888	Joan Vich	 
Mobile	999 - 999 999	Josep Llorc Tella	 
Address	c/ Estació 5-2	José Manuel Fuentes	 
City	Palma de Mallorca	Manolo Garcia	 
Postcode	07003	Martínez Izquierdo	 
Province	Illes Balears	Mireia Ferriol	 
Country	Spain	OpenKM Document Magement	 
Web	http://www.openkm.com	Rafel Gelabert	 
Notes	<div></div>	Sebastian Oller	 

New contact

Close

Double clicking on a contact or clicking on the **edit contact** icon  will allow editing.

Manage contacts

Name	<input type="text" value="Josep Llorc Tella"/>	Carles Ramis	 
Mail	<input type="text" value="jllort@openkm.com"/>	Francisco José Ávila Bermejo	 
Phone	<input type="text" value="999 - 888 777"/>	Gaspar Palmer	 
Fax	<input type="text" value="999 - 999 888"/>	Joan Vich	 
Mobile	<input type="text" value="999 - 999 999"/>	Josep Llorc Tella	 
Address	<input type="text" value="c/ Estació 5-2"/>	José Manuel Fuentes	 
City	<input type="text" value="Palma de Mallorca"/>	Manolo Garcia	 
Postcode	<input type="text" value="07003"/>	Martínez Izquierdo	 
Province	<input type="text" value="Illes Balears"/>	Mireia Ferriol	 
Country	<input type="text" value="Spain"/>	OpenKM Document Magement	 
Web	<input type="text" value="http://www.openkm.com"/>	Rafel Gelabert	 
Notes	<div></div>	Sebastian Oller	 

Update

Cancel

New contact

Close

Selecting the **update** button will update the contact record. If you want to cancel editing, select the **cancel** button.

If you want to create a new contact from manage contacts view, select the **new contact** button. A new contact will appear with empty fields. The Name field is mandatory.

Manage contacts

Name

Mail

Phone

Fax

Mobile

Address

City

Postcode

























Province

Country

Web

Notes

Contacts List:

- Carles Ramis  
- Francisco José Ávila Bermejo  
- Gaspar Palmer  
- Joan Vich  
- Josep Lloret Tella**  
- José Manuel Fuentes  
- Manolo Garcia  
- Martínez Izquierdo  
- Mireia Ferriol  
- OpenKM Document Magement  
- Rafel Gelabert  
- Sebastian Oller  

Buttons: Add Cancel New contact Close

Select the **add** button to save the contact record. If you want to cancel editing, select the **cancel** button.

If you want to delete a contact, click on the delete icon . A confirmation popup will appear.

Confirmation

¿ Are you sure want deleting contact ?

Buttons: Cancelar Aceptar

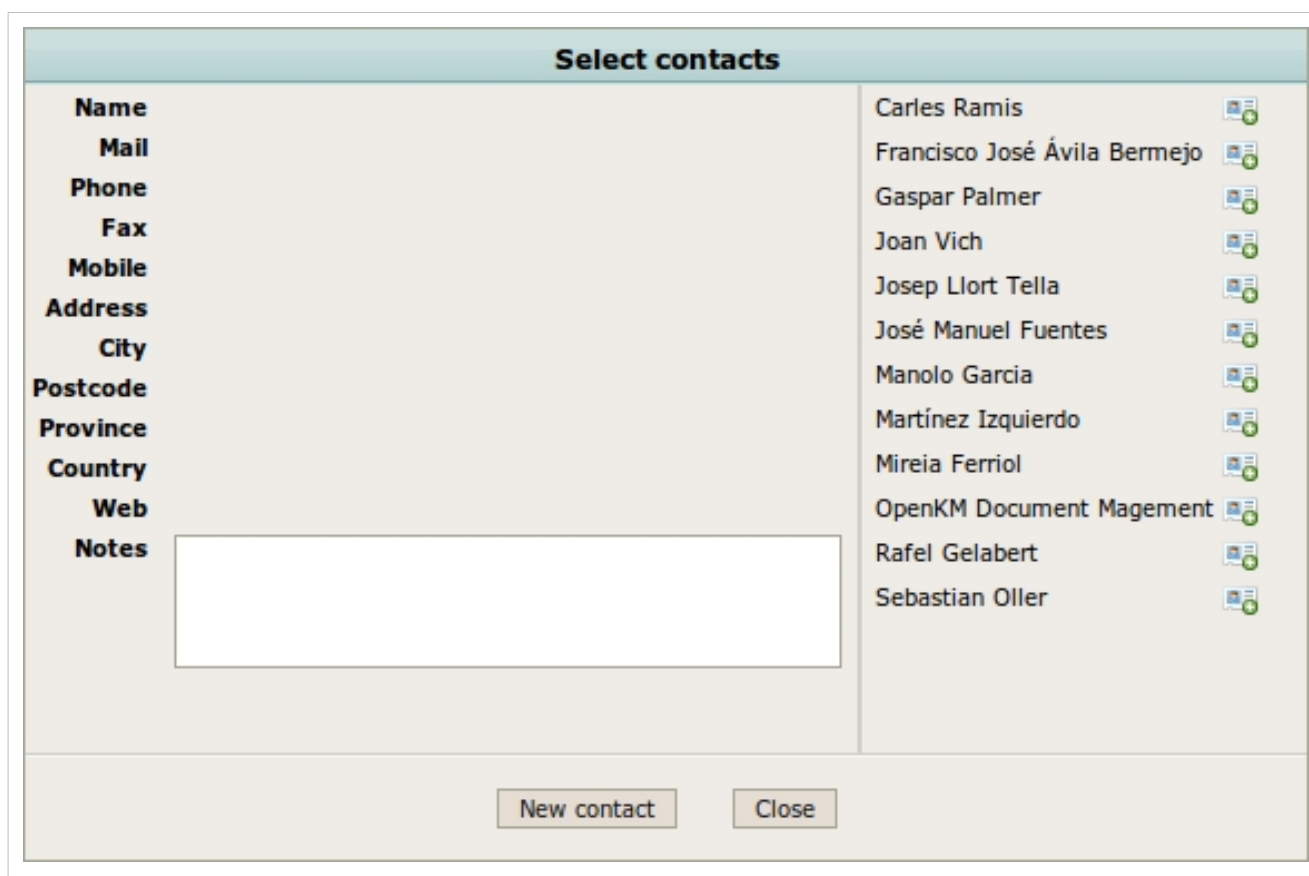
Manage contact from tab view

On the document, folder or email view can appear managed contacts. Assign a contact to some document, folder or email, or delete or update contact field values. For all these operations write permissions are needed on the document, folder or email.




The screenshot shows a document view with a 'Contacts' tab selected. The tab contains a list of contact fields: Name, Mail, Phone, Fax, Mobile, Address, City, Postcode, Province, Country, Web, and Notes. A large text input field is provided for the Notes. An 'Add' button is located in the top right corner of the contact list area.


To add a new contact, select the add button. A popup will appear.








The screenshot shows a 'Select contacts' popup window. The window has a title bar 'Select contacts'. It contains a list of contact fields on the left and a list of contacts on the right. The contacts list includes: Carles Ramis, Francisco José Ávila Bermejo, Gaspar Palmer, Joan Vich, Josep Llort Tella, José Manuel Fuentes, Manolo Garcia, Martínez Izquierdo, Mireia Ferriol, OpenKM Document Magement, Rafel Gelabert, and Sebastian Oller. Each contact name has a small contact icon next to it. At the bottom of the window are two buttons: 'New contact' and 'Close'.

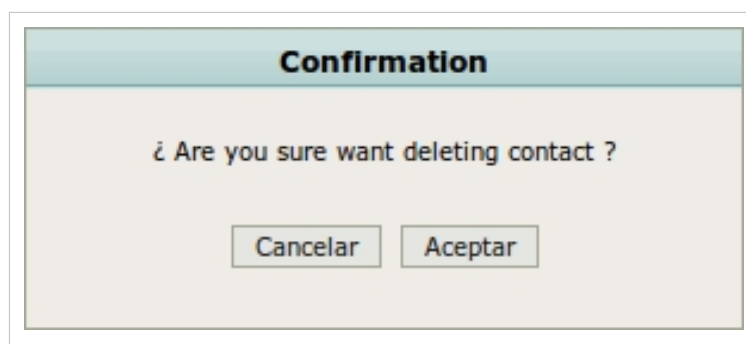
From the list appearing on the right, you can select some contact to be linked to a document, folder or email by clicking on the **contact icon** .

Properties	Notes	History	Security	Preview	Contacts
Name	Josep Llorc Tella				<div>Add</div> <div>Josep Llorc Tella  </div> <div>José Manuel Fuentes  </div>
Mail	jllort@openkm.com				
Phone	999 - 888 777				
Fax	999 - 999 888				
Mobile	999 - 999 999				
Address	c/ Estació 5-2				
City	Palma de Mallorca				
Postcode	07003				
Province	Illes Balears				
Country	Spain				
Web	http://www.openkm.com				
Notes	<div></div>				

Double clicking on the tab contact list or clicking on the edit icon  can edit the contact record (you must have write privileges on this view).

Properties	Notes	History	Security	Preview	Contacts
Name	<input type="text" value="Josep Llorc Tella"/>				<div>Add</div> <div>Josep Llorc Tella  </div> <div>José Manuel Fuentes  </div>
Mail	<input type="text" value="jllort@openkm.com"/>				
Phone	<input type="text" value="999 - 888 777"/>				
Fax	<input type="text" value="999 - 999 888"/>				
Mobile	<input type="text" value="999 - 999 999"/>				
Address	<input type="text" value="c/ Estació 5-2"/>				
City	<input type="text" value="Palma de Mallorca"/>				
Postcode	<input type="text" value="07003"/>				
Province	<input type="text" value="Illes Balears"/>				
Country	<input type="text" value="Spain"/>				
Web	<input type="text" value="http://www.openkm.com"/>				
Notes	<div></div>				
<div>Update Cancel</div>					

Clicking on the delete icon  can delete the link between contact and document, folder or email. A confirmation message will appear. In the tab view the contact record is not actually deleted. Only the link between contact and document, folder or email is deleted.



Activity log tab

Activity log tab allows you to see document, folder or email logs.

You can view all or filtered logs for the selected document, folder or email. The **View get childs** option filters the get childs action, because that's one of the most common.

Properties	Notes	History	Security	Preview	Contacts	Activity log
Filter ALL_ACTIONS <input type="button" value="v"/> View get childs <input type="checkbox"/>						
Action	User	Date	Parameters			
GET_DOCUMENT_VERSION_HISTORY	okmAdmin	04-03-2011 12:04:32	/okm:root/manual.pdf			
GET_DOCUMENT_VERSION_HISTORY	okmAdmin	04-03-2011 12:04:39	/okm:root/manual.pdf			
GET_DOCUMENT_PROPERTIES	okmAdmin	04-03-2011 12:04:40	[], /okm:root/manual.pdf			
GET_DOCUMENT_CONTENT	okmAdmin	04-03-2011 12:04:40	152461, /okm:root/manual.pdf			

Google contacts synchronization

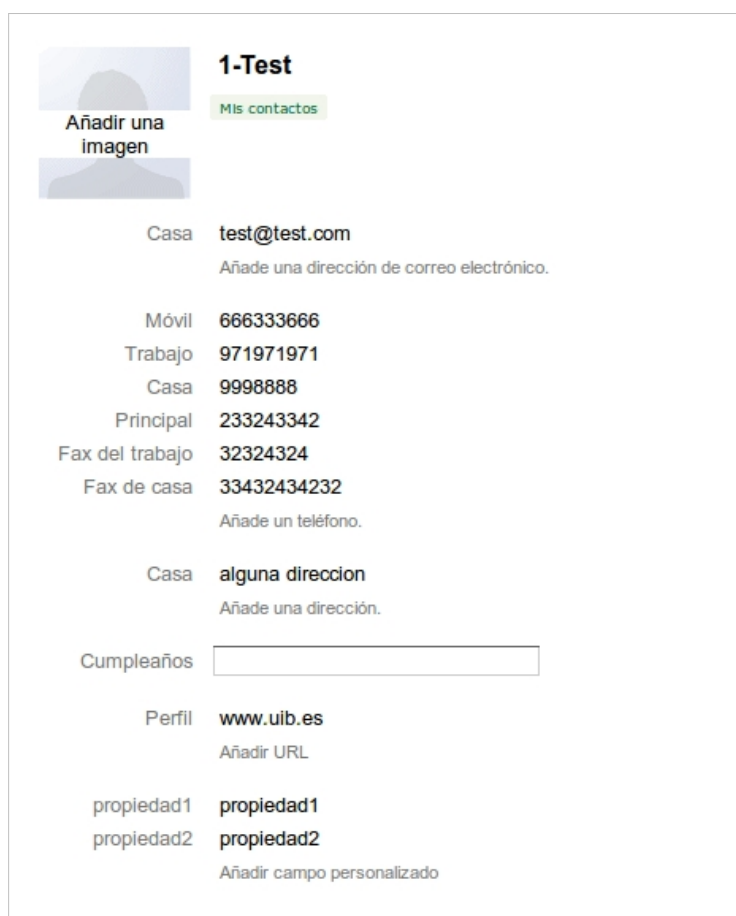
This allows you to synchronize your Google contacts groups to OpenKM, import new contacts or update previously imported contact information.

Synchronizing

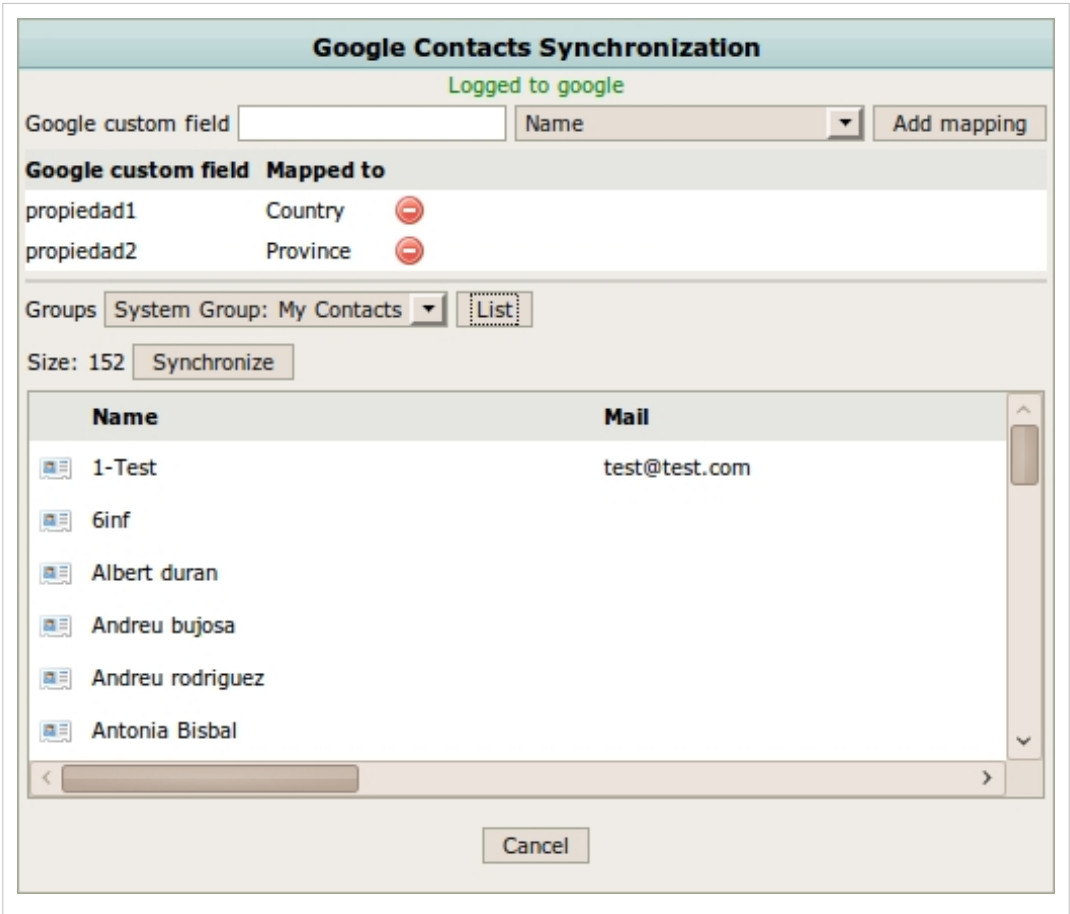
Go to the **Tools** menu, select the menu **Contacts** and the sub menu **Google Contacts Synchronization**. The Google Contacts Synchronization popup will appear. Put your **username** and **password** and then **login**.

A screenshot of a web-based login dialog titled "Google Contacts Synchronization". It features two input fields: "User" and "Password". Below these fields are two buttons: "Login" and "Cancel". The dialog has a light blue header and a light beige body.

If you have custom fields defined on Google Contacts you can map them to OpenKM (for example on the screenshot the custom fields are called propiedad1 and propiedad2).

A screenshot of a contact card for a contact named "1-Test". The card includes a profile picture placeholder with the text "Añadir una imagen". Below the name, there is a green tag that says "Mis contactos". The card lists various contact details: "Casa" with email "test@test.com" and a prompt "Añade una dirección de correo electrónico."; "Móvil" with number "666333666"; "Trabajo" with number "971971971"; "Casa" with number "9998888"; "Principal" with number "233243342"; "Fax del trabajo" with number "32324324"; "Fax de casa" with number "33432434232" and a prompt "Añade un teléfono."; "Casa" with address "alguna direccion" and a prompt "Añade una dirección."; "Cumpleaños" with an empty input field; "Perfil" with URL "www.uib.es" and a prompt "Añadir URL"; and two custom fields, "propiedad1" and "propiedad2", both with the same values as their labels, and a prompt "Añadir campo personalizado".

Set the custom fields if you have defined some. Select the contact group you want to import and then list them.

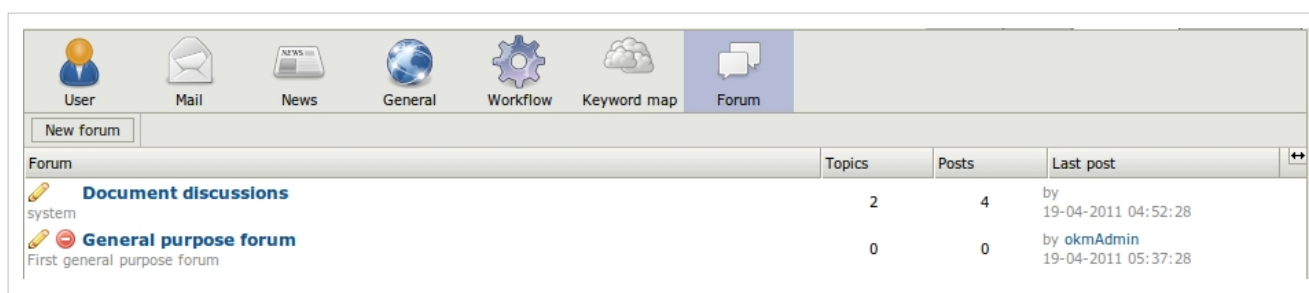


See if the mapping has been executed correctly. If all is alright, then you can synchronize contacts. Note that if contacts have been imported before to the OpenKM, they'll be updated with actual Google values. If not, they'll be inserted into OpenKM. After finishing synchronization, a message will appear at the top indicating that the operation has been completed successfully.

Forum

Forum allows for creating document, folder or email discussion topics or creating general purpose forums.

In Desktop view, you will see a new tab called forum where users can have discussions about documents, folders or emails in several topics. Also in Dashboard view, they can access general purpose forums.



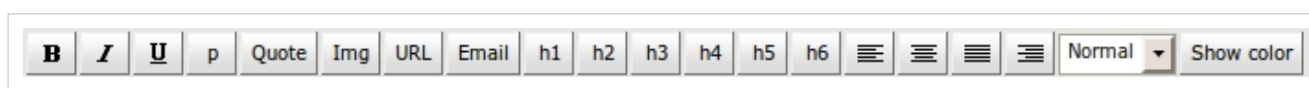
Retrictions

- Only users with administrator rights can create, update or delete forums.
- Only users with administrator rights can see the document discussions forum in dashboard view.
- Nobody can delete document discussions forum (document / folder / email discussion).

Description of different icon options

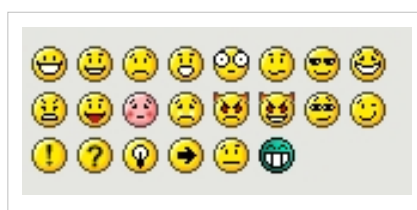
- → Edit forum / topic / contact
- → Delete forum / topic / contact

Forum editor features



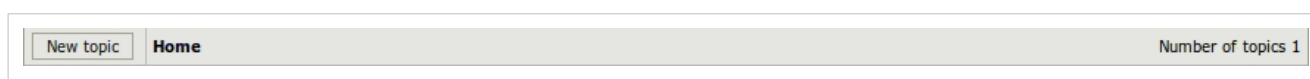
- B - Bold
- I - Italic
- U - Underline
- p - Paragraph
- Quote - Make a quotation
- Img - Add image url.
- Email - Add email.

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



Create new topic

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



The post form will appear. Fill the fields.

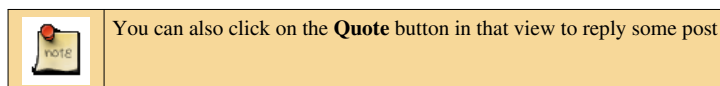
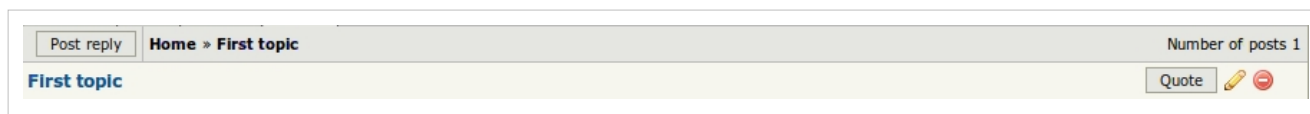
A screenshot of the 'CREATE TOPIC' form. At the top, there's a 'Subject' input field. Below it, a row of buttons for text formatting: Bold (B), Italic (I), Underline (U), Paragraph (p), Quote, Image (Img), URL, Email, and header tags (h1 to h6). To the right of these are buttons for text alignment (left, center, right, justified) and a 'Normal' dropdown menu. Further right is a 'Show color' button. Below the formatting buttons is a large text area for the topic content. To the right of the text area is a grid of 24 smiley faces. At the bottom of the form are 'Cancel' and 'Create' buttons.

Click on the **create** button and you will be forwarded to topic view with all posts.



Create a reply

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



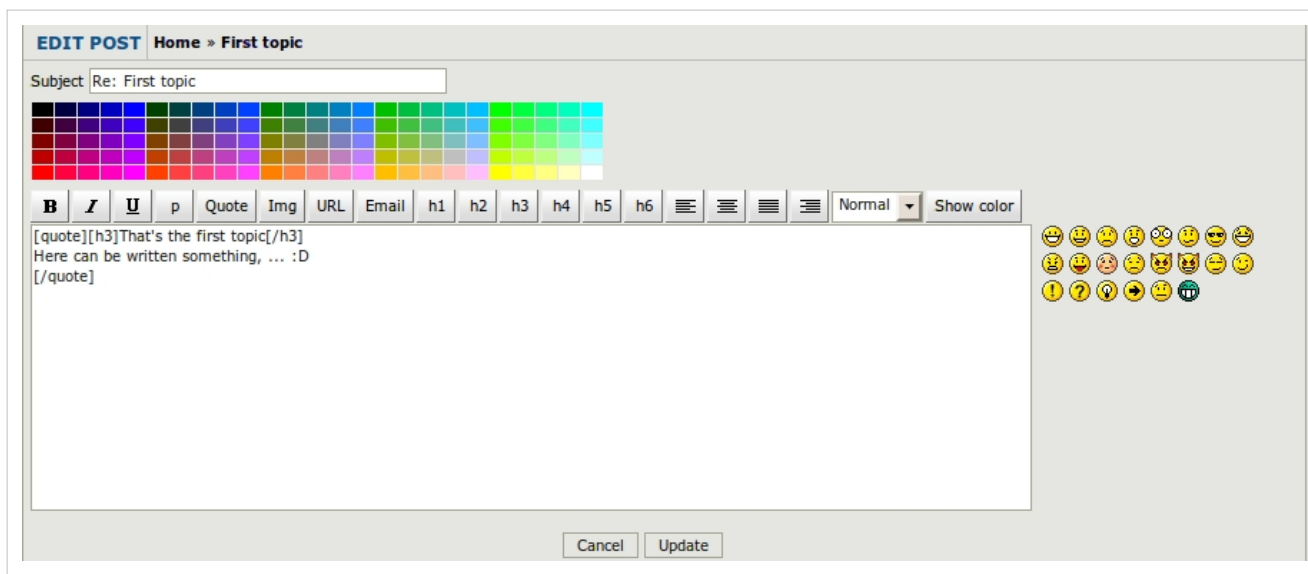
The post form will then appear. Fill the fields.

A screenshot of the 'CREATE POST' form. At the top, it says 'CREATE POST' and 'Home » First topic'. Below that is a 'Subject' field with the text 'Re: First topic'. To the left of the text area is a color selection palette. Below the palette is a row of buttons: 'B' (bold), 'I' (italic), 'U' (underline), 'p' (list), 'Quote', 'Img', 'URL', 'Email', 'h1', 'h2', 'h3', 'h4', 'h5', 'h6', and a 'Normal' dropdown menu. To the right of these buttons is a 'Hide color' button. The main text area contains the text: '[quote][h3]That's the first topic[/h3] Here can be written something, ... :D [/quote]'. To the right of the text area is a grid of 24 different smiley faces. At the bottom of the form are 'Cancel' and 'Create' buttons. Below the form, there is a section for the 'First topic' by 'okmAdmin' on '19-04-2011 05:08:24' with the title 'That's the first topic'.

Click on the **create** button and you will be forwarded to topic view with all posts.


Update a post

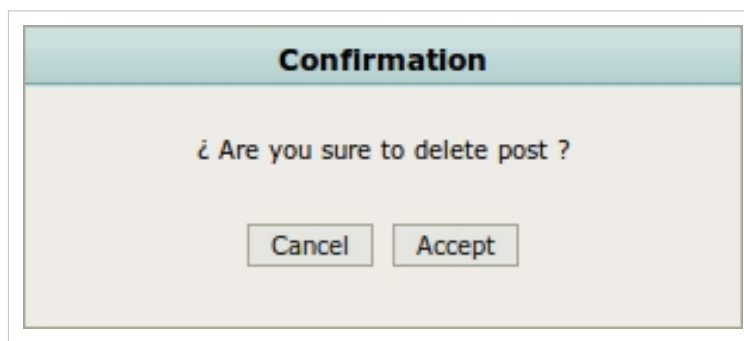
Enter into some topic, and click on an edit post icon . The update post form will appear.



Click on the **Update** button and the post will be updated.

Delete a post

Enter into some topic, and click on a delete post icon . A confirmation message will appear.



Click on the **Accept** button and the post will be deleted.

Topic features

- To delete a topic, you must delete all posts.
- Renaming the first post will rename the topic.

Create a forum

In dashboard view, click on the **New forum** button.



The forum form will appear.

CREATE FORUM

Name

B **I** **U** **p** Quote **Img** URL Email h1 h2 h3 h4 h5 h6

testing new general forum

Click on the **Create** button. You will be forwarded to forum view.

Home » New general forum Number of topics 0

Topics	Replies	Views	Last post	
--------	---------	-------	-----------	--

There, you can create new topics.

Update a forum

In dashboard view, click on an edit forum icon . The update forum form will appear.

EDIT FORUM


Name

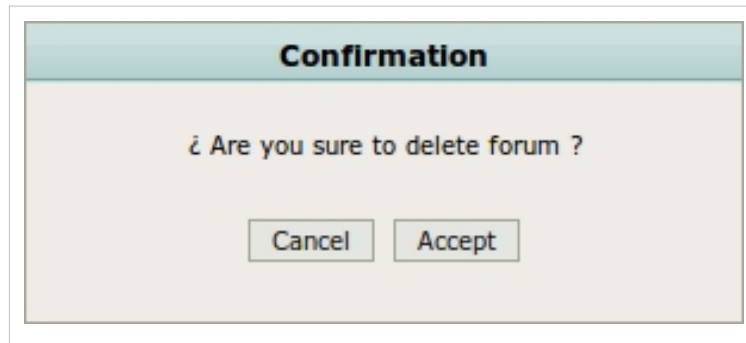
B **I** **U** **p** Quote **Img** URL Email h1 h2 h3 h4 h5 h6

First general purpose forum

Click on the **Update** button and the forum will be updated.

Delete a forum

In dashboard view, click on a delete forum icon . A confirmation message will appear.



Click on the **Accept** button and the forum will be deleted.

Wiki

Wiki allows fast creation and editing of 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 email can have its own wiki. In the Dashboard, there's a general purpose wiki for all OpenKM, where new wiki pages can be created linked with documents, folders among others.

Properties

Notes

Security

History

Preview

Wiki

Current page

Update

History

Delete

Modified 10-10-2011 11:34:33 User okmAdmin

Wiki test

OpenKM is an Free/Libre document management system that provides a web interface for managing arbitrary files. **OpenKM** includes a content repository, **Lucene** indexing, and **JBPM** workflow. The OpenKM system was developed using Java technology.

In 2005 two developers involved in open source technologies and expertise with some commercial document management solutions (Sharepoint, Documentum, Hummingbird, among others) like Excalibur search engine or Kofax OCR engine decided to start an open source project based on high level technologies to build a document management system that they decided to call OpenKM.

At the project's outset, it received the help of Spanish government funds from the PROFIT project.[citation needed] At the end of 2006 the first OpenKM version was released.

Section one

Example of a document link here: [arbol_pequeño.png](#)
Example of a document folder here: [test](#)
Example of a simply wiki page link: [wiki page test](#)

Section two

[OpenKM Website](#)
[OpenKM Website](#)
OpenKM Download
OpenKM Official Forum
OpenKM Documentation
OpenKM at sourceforge

Wiki editor features



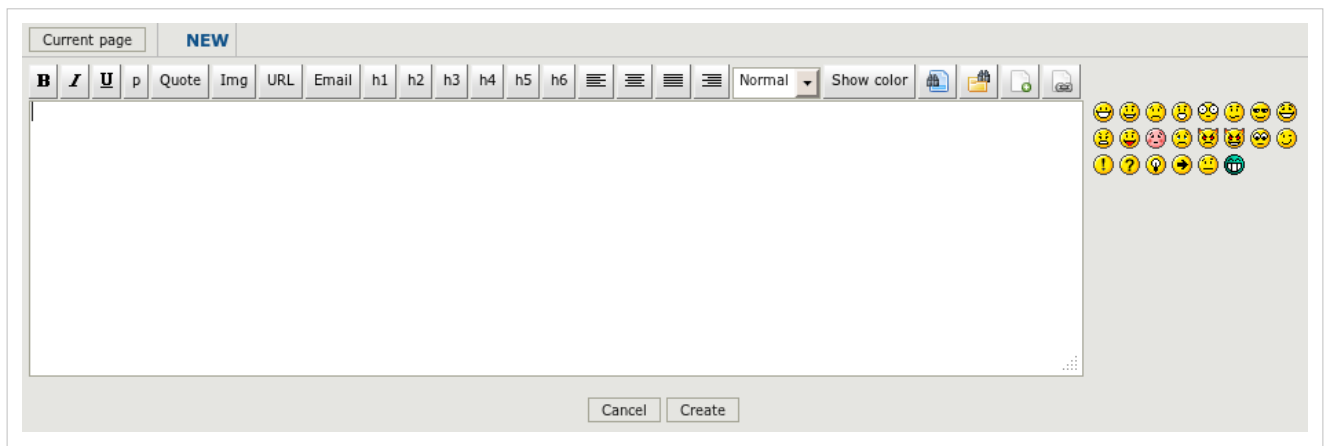
- B - Bold
- I - Italic
- U - Underline
- p - Paragraph
- Quote - Make a quotation
- Img - Add image url.
- Email - Add email.
- h1 to h6 - Header settings.
- Align Left, center, justify and right.
- Text size.
- Font color palette.
- Smilies
- Document link
- Folder link
- New wiki page
- Wiki page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

Create new wiki page

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



The wiki editor will appear. Fill the content.



Click on the **create** button and you will be forwarded to wiki view.

Properties	Notes	Security	History	Preview	Wiki
Current page	Update	History	Delete	Modified 10-10-2011 11:53:10 User okmAdmin	

my first wiki page

Here's the content of my first wiki page.

Update wiki page

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

Current page	Update	History	Delete	Modified 10-10-2011 11:53:10 User okmAdmin
--------------	--------	---------	--------	--

The wiki editor will appear. Update the content.

Current page	EDITING	Locked by okmAdmin Modified 10-10-2011 11:53:10 User okmAdmin	
<div><div>B I U p Quote Img URL Email h1 h2 h3 h4 h5 h6 Normal Show color </div><div><p>[h1]my first wiki page[/h1]</p><p>Here's the content of my first wiki page.</p><p>[b]inserted content[/b] !!!</p></div></div>			
<div>Cancel Update</div>			

Click on the **update** button and you will be forwarded to wiki view.

Current page	Update	History	Delete	Modified 10-10-2011 11:57:32 User okmAdmin
--------------	--------	---------	--------	--

my first wiki page

Here's the content of my first wiki page.

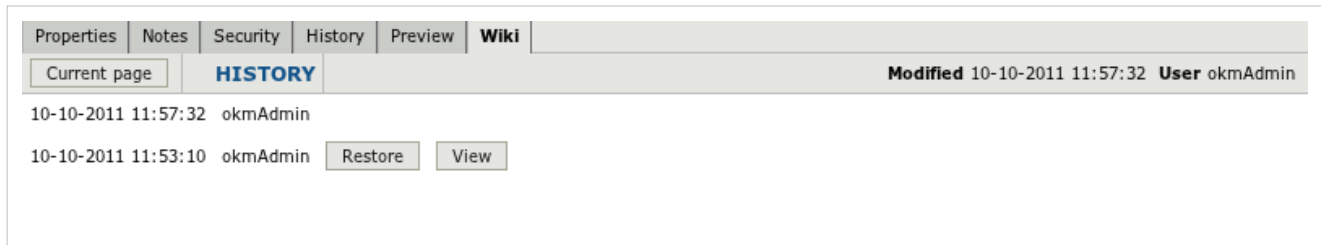
Inserted content !!!

History wiki page

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



The wiki history page will appear.



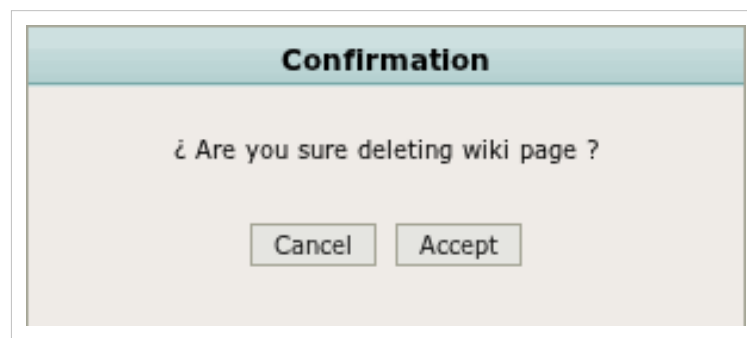
From this view you can view or restore older wiki pages.

Delete wiki page

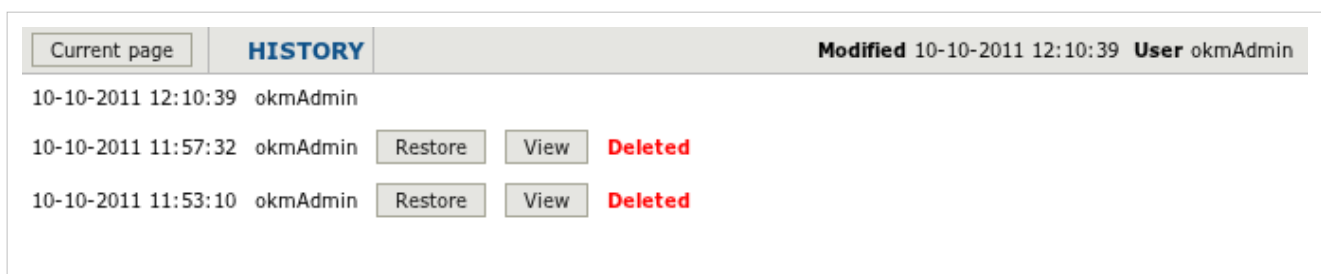
If you're in Desktop view, select the wiki tab, and click on the **delete** button.



A confirmation popup will appear.

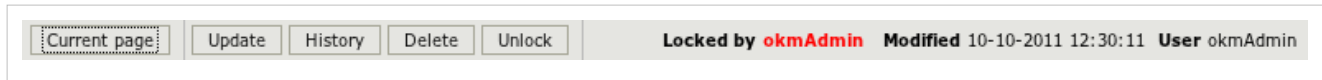


If you click on the **accept** button, the wiki page will be deleted (database marked as deleted). To restore, simply create a new page with the same name and go to history. Deleted wiki pages can be deleted from there.




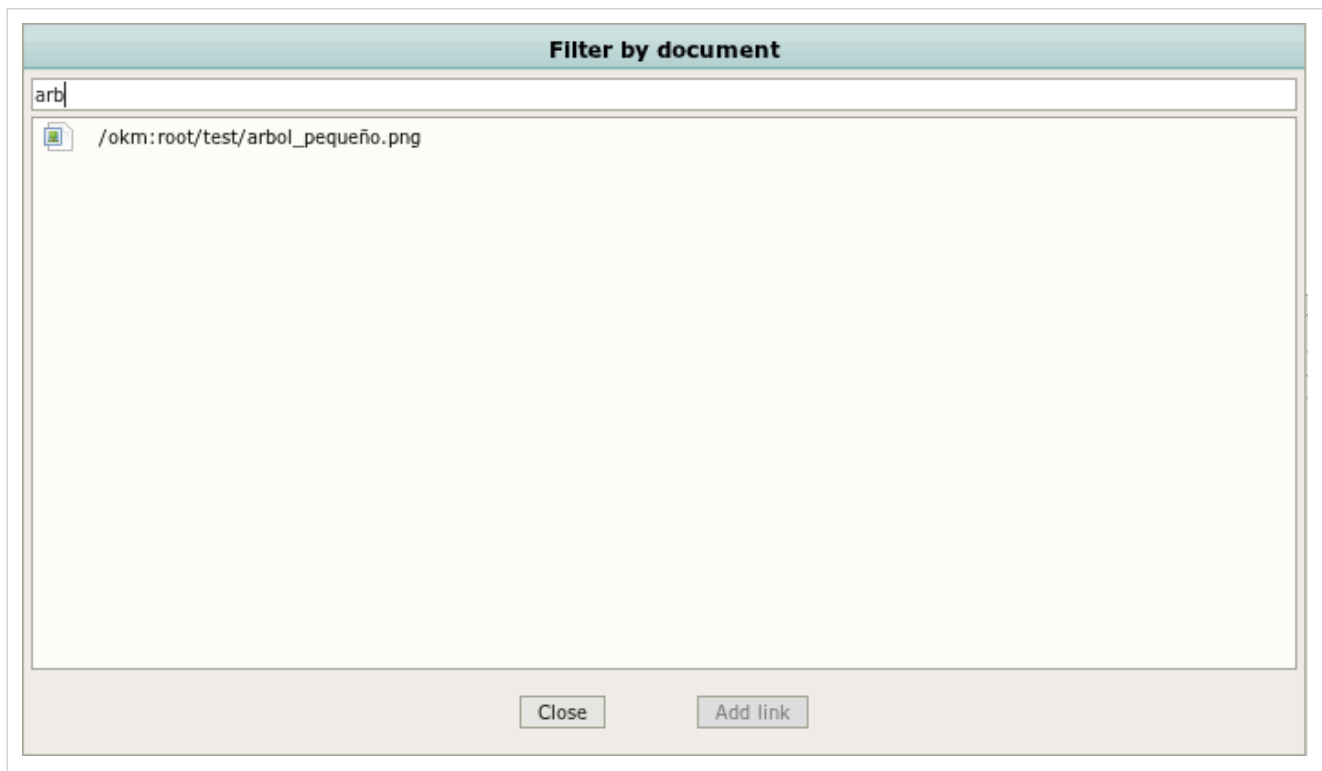
Unlock wiki page

Wiki pages are updated by only one user at a time. While a page is being updated by this user, nobody else can change it. The user who has locked the wiki page can directly unlock it by clicking on the **unlock** button (normally if a user from the edit view has pressed cancel or update, the wiki page will be unlocked).




Inserting document link

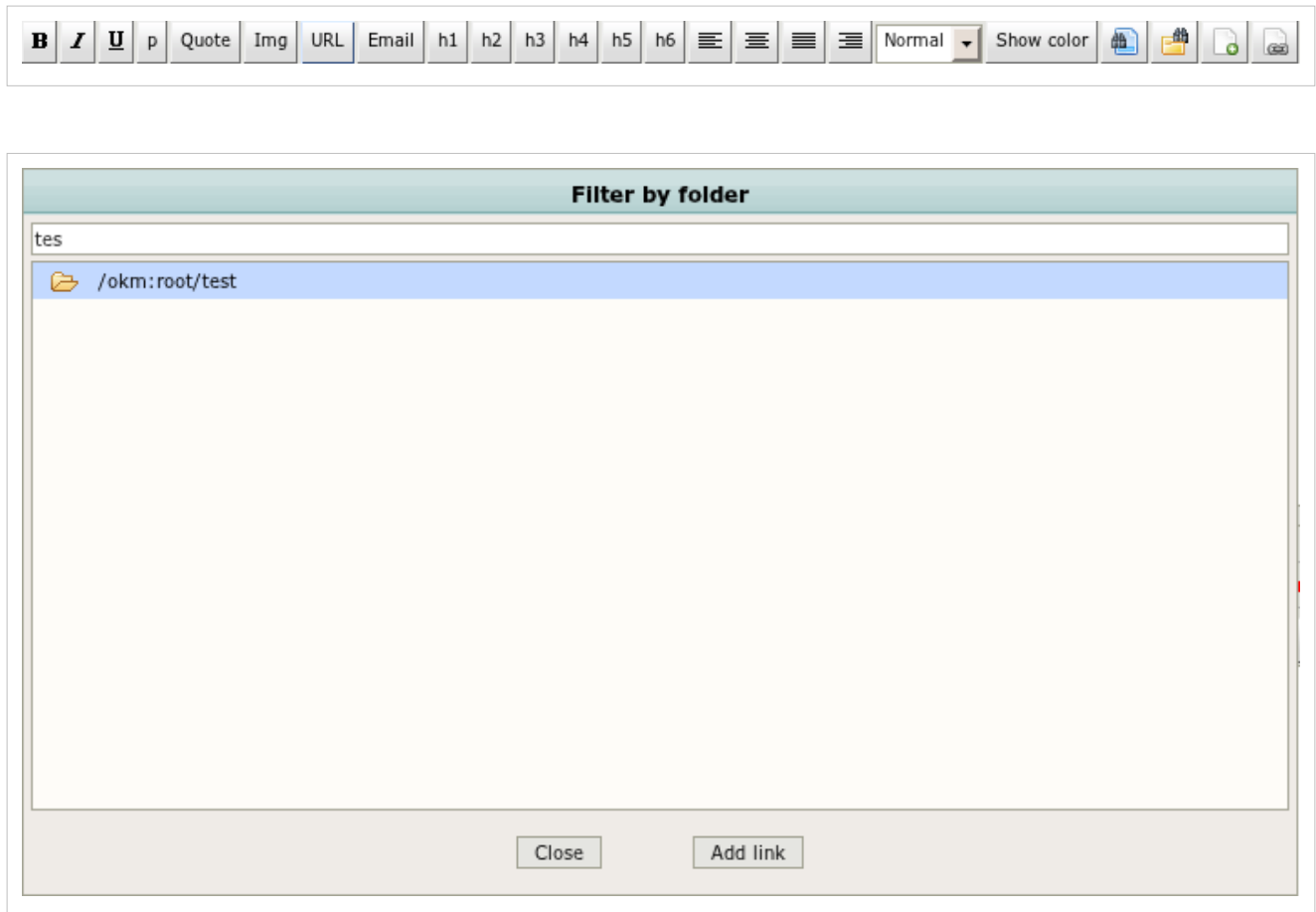
From the update wiki editor view, select the find document  icon. A document finder popup will appear.



Select the document you want to link and click on the **Add link** button.


Inserting folder link

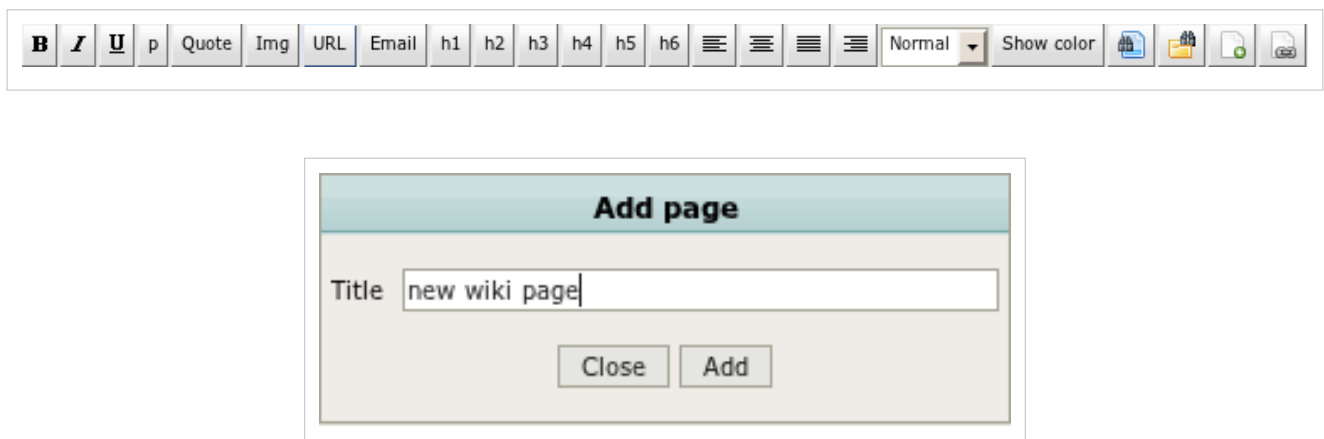
From the update wiki editor view, select the find folder  icon. A folder finder popup will appear.



Select the folder you want to link and click on the **Add link** button.


Insert new wiki page link

From the update wiki editor view, select the new wiki page  icon. A popup will appear.



Set the new wiki page title (if it already exists, it will not replace the existing wiki page) and then click on the **Add** button.

Insert existing wiki page link

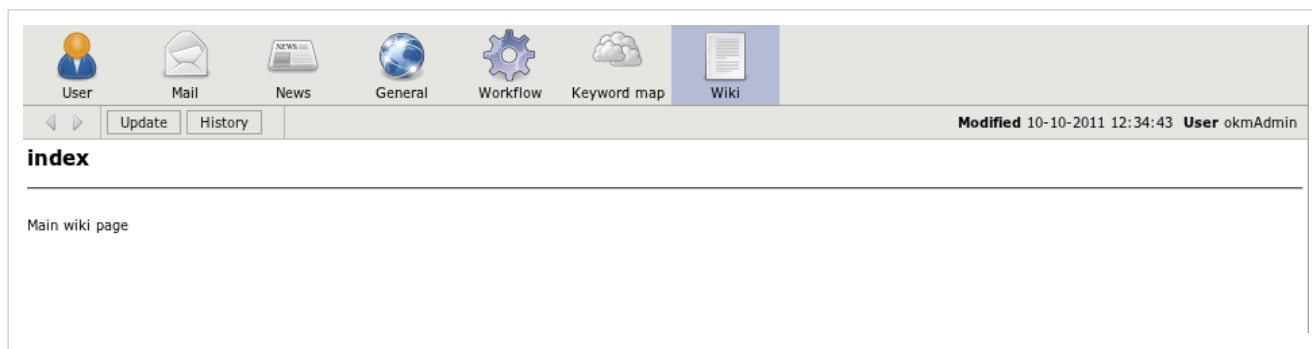
From the update wiki editor view, select the wiki page  icon. A wiki page finder popup will appear.



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

General wiki

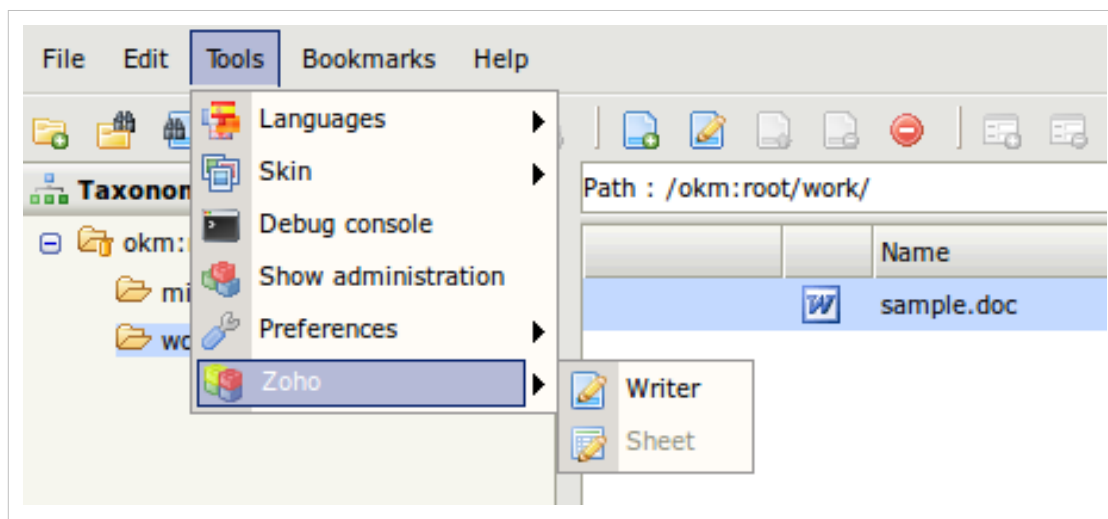
In Dashboard view, there's a general purpose wiki. The main wiki page - called index - cannot be deleted. This view includes navigator buttons with history of wiki pages clicked by users.



Zoho

The Zoho Suite is a Web-based online office suite containing word processing, spreadsheets, etc. OpenKM integration make possible online editing of documents stored in OpenKM repository.

When you enable the Zoho Extension you will see a new entry in the Tools menu. This submenu has a couple of entries to edit text documents and sheets.



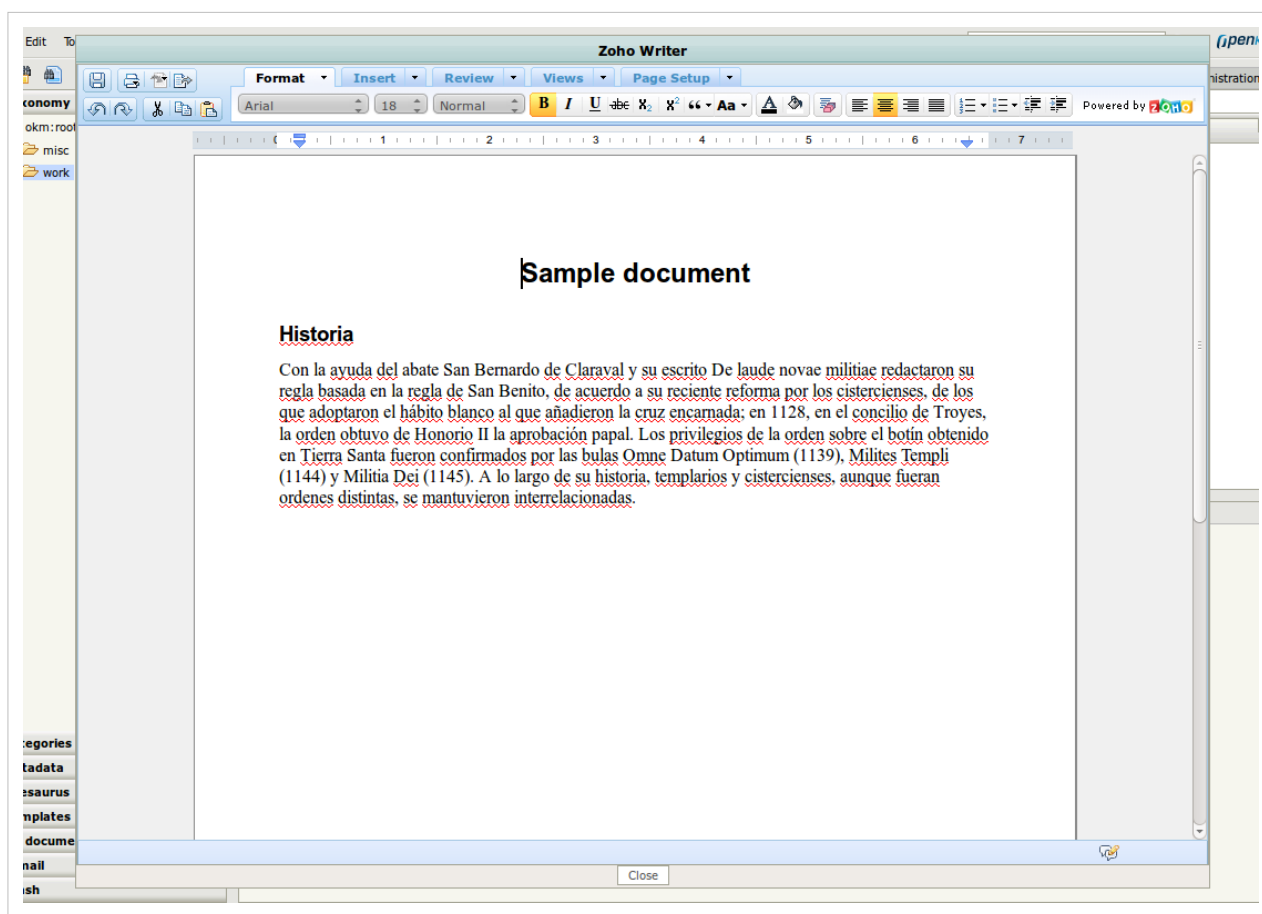
Zoho Writer option will be available when you select a document of these types:

- Microsoft Word (doc)
- OpenOffice Text (odt)
- Rich Text Format (rtf)
- Plain Text (txt)
- HTML (html)

Zoho Sheet is enable if you select a document of these types:

- Microsoft Excel (xls)
- OpenOffice SpreadSheet (osd)

Once you have selected the document, click on the Zoho application and will open a dialog where you can modify the document contents:



Every time you click on the **Save** button, the document is sent back to OpenKM and a new version is created. Once you have completed the edition, click on the **Close** button to close the dialog and continue using OpenKM.

In order to use Zoho Extension you need to provide the following parameters:

- zoho.user
- zoho.password
- zoho.api.key
- zoho.secret.key

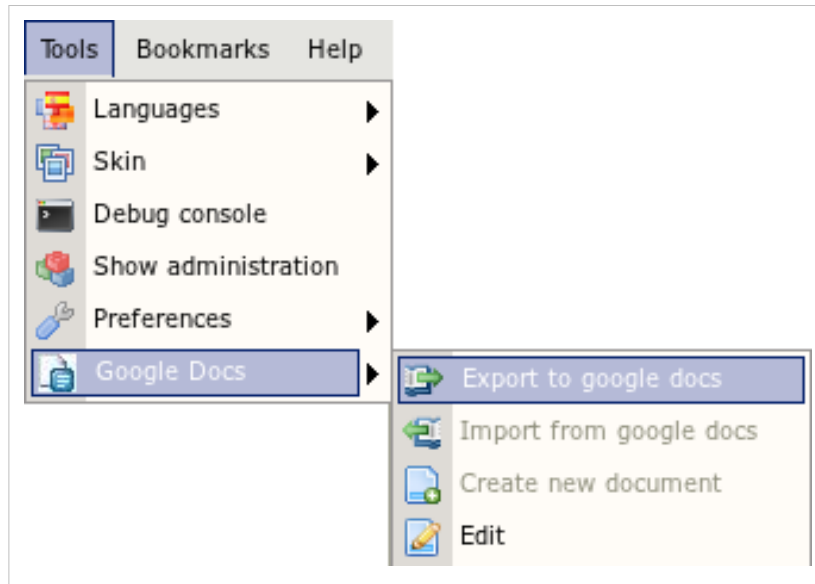
You can obtain the user and password registering at <http://zapi.zoho.com>. Once registered and logged, you can request the API Key and the Secret Key. In the Zoho Dashboard you can also check how many edition request you have performed.



Communications between Google Docs and OpenKM uses always the secure https protocol.

Google docs

Google Docs is a online, free word processing with Google documents, where can create and share documents on the web and access them from any computer or smart phone. The familiar desktop feel makes collaborative editing easy. When you enable the Google Docs Extension you will see a new entry in the Tools menu. This submenu has a couple of entries to edit text documents, sheets, presentations, create new documents or import/export from Google docs.

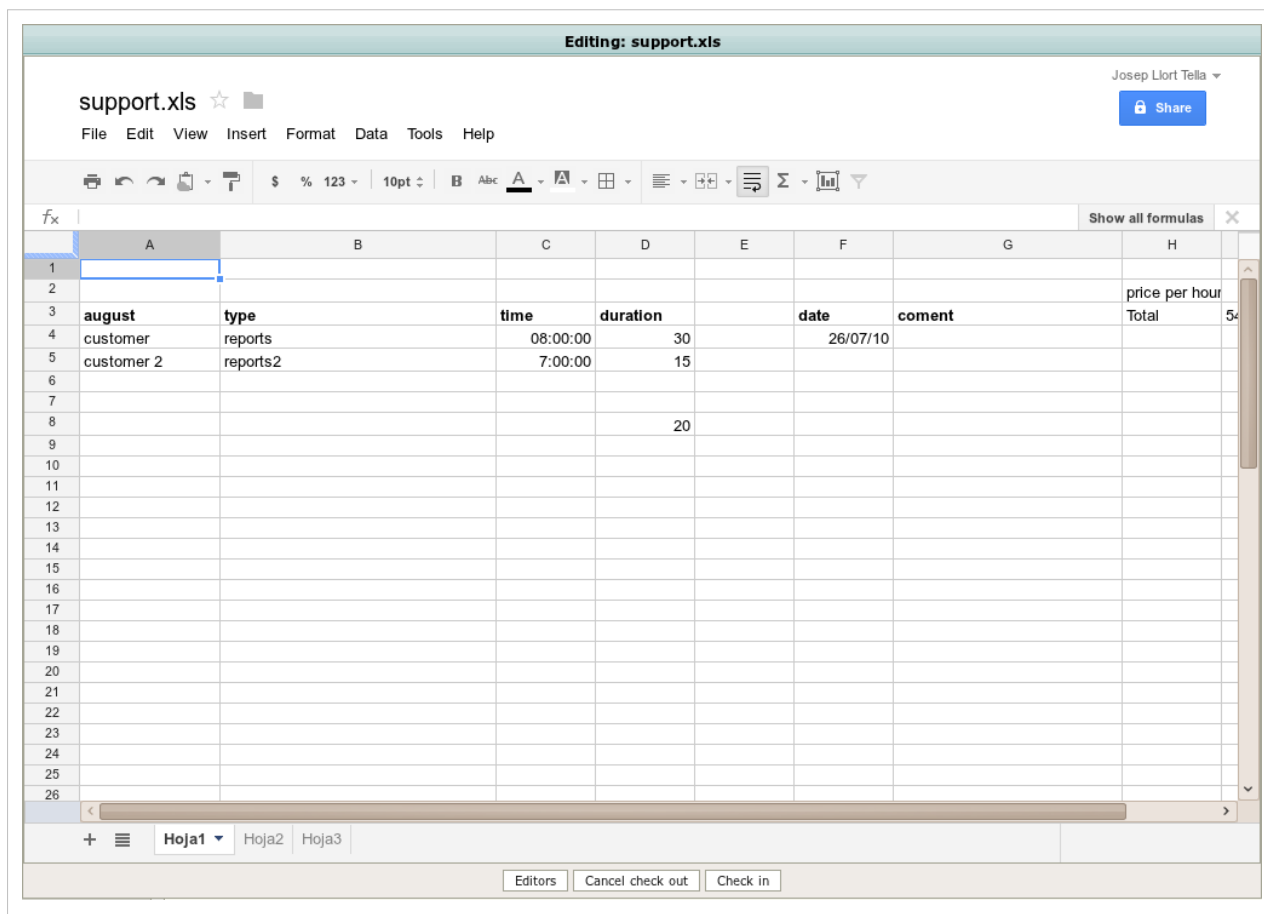


Google Docs option will be available when you select a document of these types:

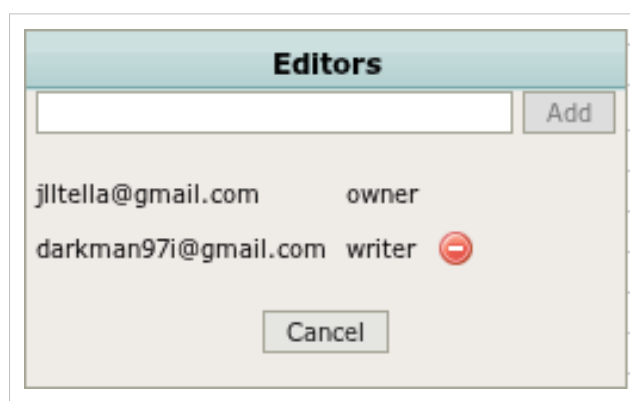
- **Edit:** The supported formats are csv", ".doc", ".docx", ".html", ".htm", ".ods", ".odt", ".pdf", ".ppt", ".pps", ".rtf", ".sxw", ".tsv", ".tab", ".txt", ".xls", ".xlsx"
- **Create new file:** The supported formats are ".doc", ".txt", ".odt", ".rtf", ".xls", ".ods", ".csv", ".pptx"
- **Import from Google Docs**
- **Export to Google Docs**

Editor

Once you have selected the document, click on the **Google docs menu option editor** and will open a dialog where you can modify the document contents:



Several users can edit the file at same time. If you click on **editor button**, you can add or remove google editors. Note that only the user who started the edition is able to cancel checkout or checkin the document.



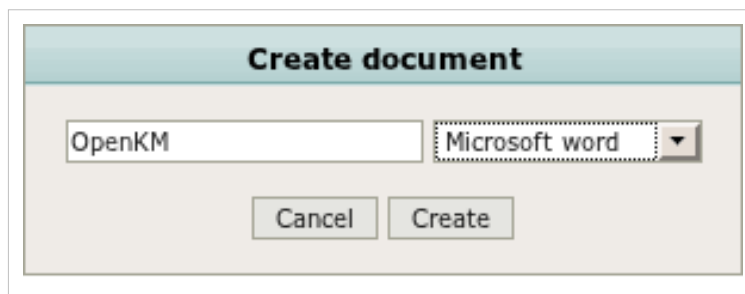
Editor are defined by gmail addresses, each time you add or revoke a editor grant Google Docs automatically sends a mail to the user.

If you click on **cancel checkout button** the document will be checkout in OpenKM repository and remote Google docs will be deleted.

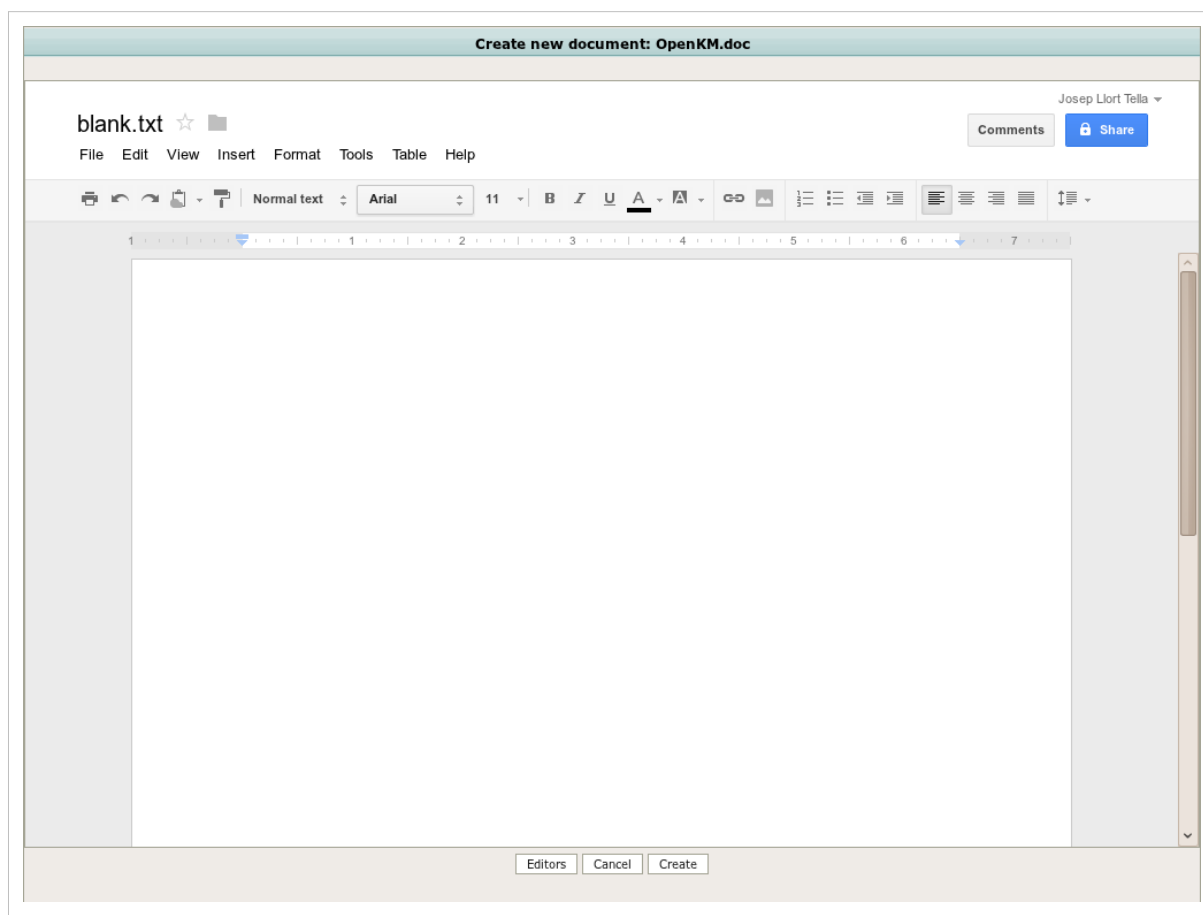
If you click on **checkin button** the document will be checkin in OpenKM repository and remote Google docs will be deleted.

Create new file

Click on Google Docs menu option **create new file** will open a dialog where you should indicate the document name (without extension) and the file type:



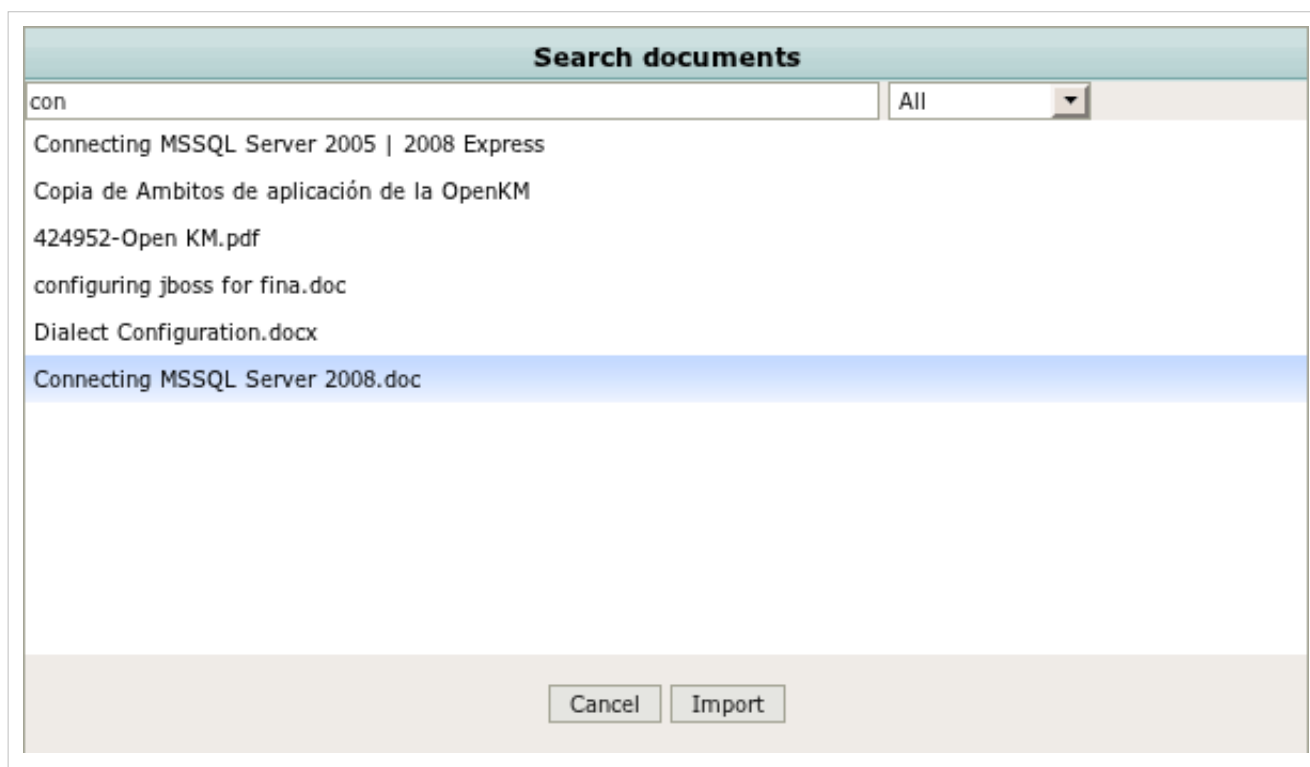
Click on **button create** and then will open a dialog where you can add document contents:



Finally click on **button create**, the document will be checkin to OpenKM repository and deleted from Google Docs.

Import from Google Docs

Click on Google Docs menu option **import file** will open a dialog:



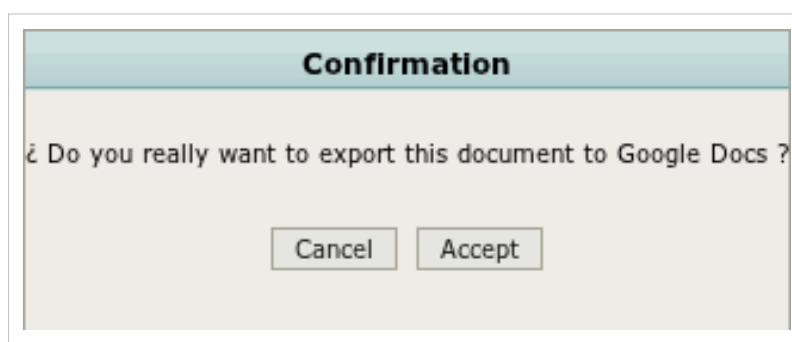
Type at least **tree characters** to doing some query - filter - in Google Docs. Select some document and then make **double click** or select **button import**.



The selected document will be imported to OpenKM and converted to one of these available formats "doc", "txt", "odt", "pdf", "png", "rtf", "html", "zip", "pptx", "swf", "xls", "ods", "csv", "tsv". If conversion is not possible will be imported in the same Google docs mime-type.

Export to Google Docs

Select some file. Click on Google Docs menu option **export file** will open a dialog:



Click on button accept and the document will be created in the Google Docs account.



For security reasons any document created or edited from OpenKM using Google docs integration is definitive deleted from Google Docs, after edition or creation. Each document created temporary in Google Docs has security restrictions to be only available to Google Docs account owner.



Communications between Google Docs and OpenKM uses always the secure https protocol.

Document expiration

Document expiration is a notification system alert which can be used to advise users nearly document expiration and expired documents. Notification messages can be configured by administration parameters.

Document expiration is based in metadata, crontab features and report features.

Properties

In configuration properties can be defined several parameters, for example, days to expiration alert or mail text message.

expiration.alert.subject	String	Alert documents will expire		
expiration.alert.template	Text	Document \${docUrl} will expire at \${date} 		
expiration.date.pattern	String	dd-MM-yyyy HH:mm:ss		
expiration.expiration.alert.days	String	15		
expiration.expired.subject	String	Documents expired		
expiration.expired.template	Text	Document \${docUrl} expired at \${date} 		
expiration.notification.subject	String	New uploaded document with expiration		
expiration.notification.template	Text	New document uploaded \${docUrl} Expiration date:\${date} 		

Metadata

Document expiration has this metadata definition:

Properties	Notes	Security	History	Preview	Expiration
<input type="button" value="Update"/> <input type="button" value="Cancel"/>					
Expiration date <input type="text"/>					
State <input type="text" value="Notify"/>					
Notify <input type="text"/> <input type="button" value="Add"/>					
Notify nearly expiration <input type="text"/> <input type="button" value="Add"/>					
Notify expiration <input type="text"/> <input type="button" value="Add"/>					

Document expiration metadata state has tree values:

- Notification
- Valid
- Expired

Notification indicates document is pending send mail to users indicating new document with expiration dates. Valid indicates the document is valid. Expired indicates the document has been expired.

Each state can have several notification groups. Each notification group can has one or more users. Which user groups configuration from administration can be defined any type of associations grouping users.

Crontab

There are three crontab task:

Crontab									
Name	Expression	Mime	File Name	Mail	Last Begin	Last End	Active		
Initial notification	1 0 * * *	application/x-java-archive	InitialNotificationation.jar				✗	✎	⚡
Alert expiration notification	0 0 * * *	application/x-java-archive	AlertExpirationNotificationation.jar				✗	✎	⚡
Expiration notification	30 0 * * *	application/x-java-archive	ExpirationNotificationation.jar				✗	✎	⚡

- Crontab **InitialNotificationation.jar** task is used to send notification to user groups linked with notify select multiple.
- Crontab **AlertExpirationNotificationation.jar** task is used to send notification to user groups linked with notify nearly expiration select multiple.
- Crontab **ExpirationNotificationation.jar** task task is used to send notification to user groups linked with notify expiration select multiple.

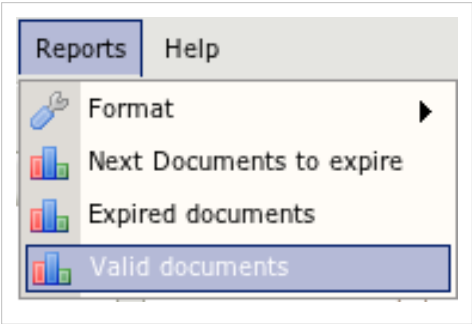
Reports


There are three reports, valid, pending to expiration and expired document reports.

Administration reports view

Reports				
Name	File Name	Active		
Expired documents	ExpiredDocuments.jrxml	✓	✎	⚡
Next Documents to expire	NextExpirationDocuments.jrxml	✓	✎	⚡
Valid documents	ValidDocuments.jrxml	✓	✎	⚡


Front end reporting menus



2012/05/03 11.33.56 AM		Valid Documents			
Expiration date		Document			
21-04-2012 00:00:00		/okm:root/Intelict.bsh			
28-04-2012 00:00:00		/okm:root/hisenda.txt			

Macros

Macros allows users to simplify repetitive operations in one click. Operations are defined in configuration parameters. When OpenKM detects macro is available in some folder, document or mail automatically the macro button is enabled and user with one click executes the operation.

-  → Execute macro

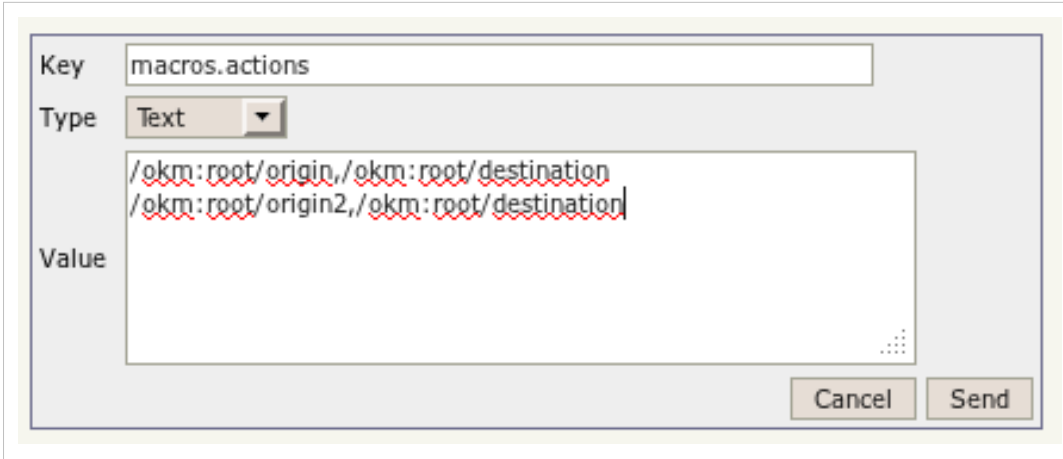
Enable macros

See Community extension section how to enable macros in your OpenKM.

Properties

In **macro.actions** property can define the actions.

For example move any subfolder into origin folder to destination folder will be defined as [origin_path,destination_path] as can see in next image. The



The screenshot shows a configuration window with the following fields:

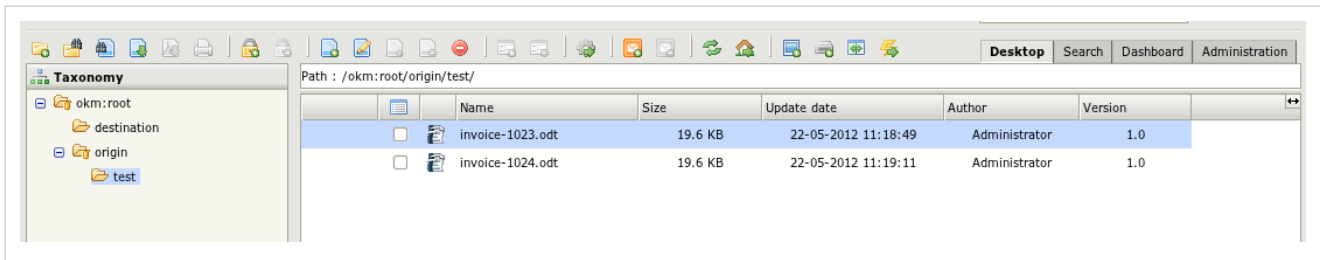
- Key:** macros.actions
- Type:** Text (dropdown menu)
- Value:** /okm:root/origin,/okm:root/destination
/okm:root/origin2,/okm:root/destination
- Buttons:** Cancel, Send

Example

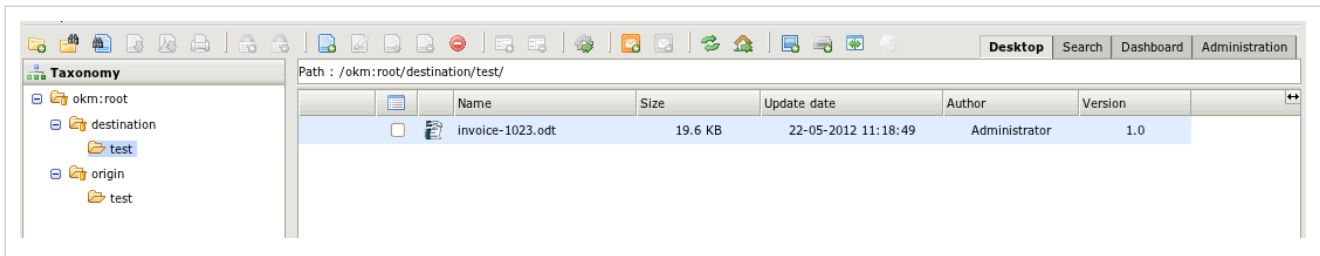
The images example covers move a document from /okm:root/origin to /okm:root/destination.

Property **macro.actions** value is **/okm:root/origin,/okm:root/destination**

The file /okm:root/origin/test/invoice-1023.odt is into folder /okm:root/origin and has fast action button enabled

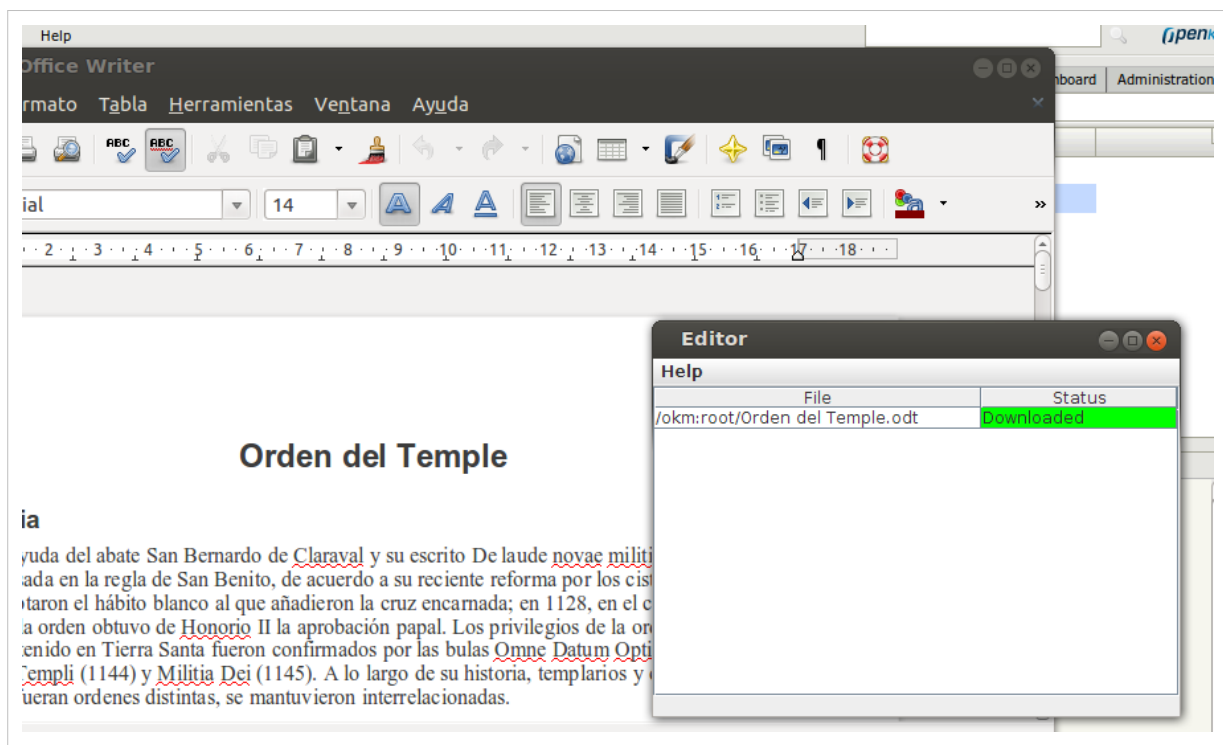


After executing macro the file **/okm:root/origin/test/invoice-1023.odt** has been moved to **/okm:root/destination/test/invoice-1023.odt**. In case folder /okm:root/destination/test not exists OpenKM will create automatically with correct grants.



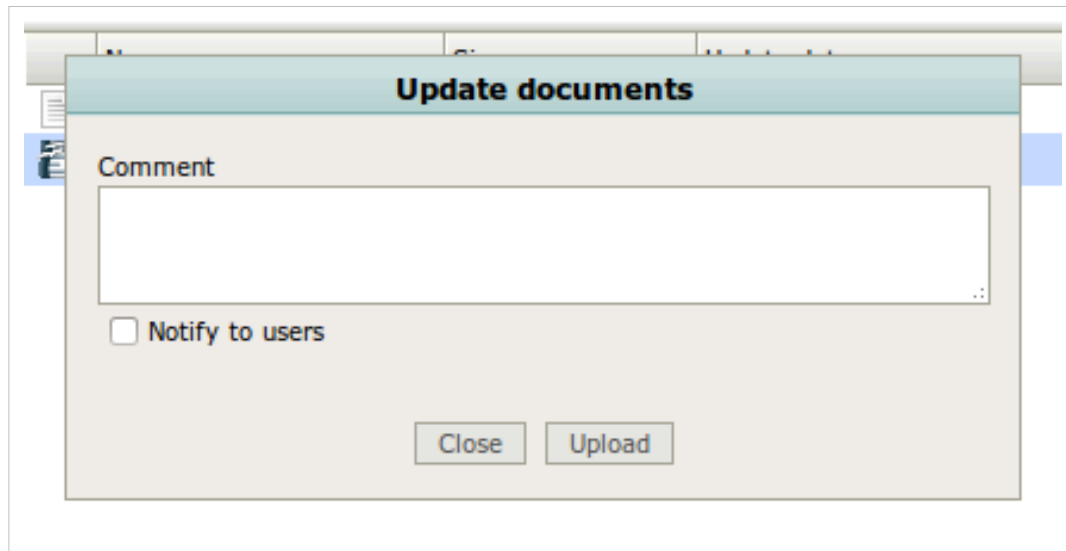
Live Edit

This extension make very easy to edit documents in OpenKM. Keep on mind that you need to activate the extension in the user profile to see it in action.



When this extension is enabled, the action of the "Checkout", "Checkin" and "Cancel checkout" toolbar buttons change and will be used to edit the document in this new way.

Once the **Checkout** button is clicked, the document will be downloaded locally, opened with the default editor and marked as checkout. Of course, if you want to edit a .doc document you need to have installed Microsoft Office or OpenOffice / LibreOffice in your computer. Every time you save the document will be sent to OpenKM to preserve the changes. But the OpenKM document won't be modified until you click on the **Checkin** toolbar button. This dialog will be shown:



Where you can write a comment as the traditional edition checkin dialog.

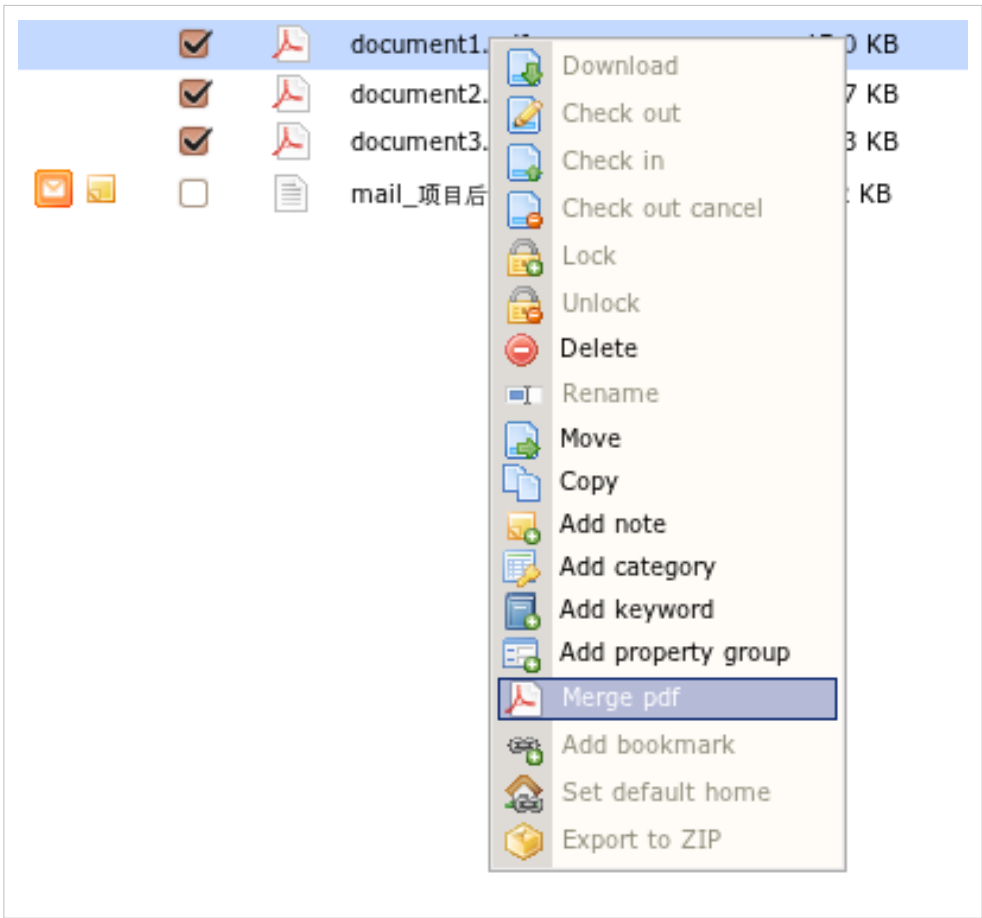
If you close the local application editor (MS Word, MS Excel, OpenOffice, LibreOffice, etc.) and want to keep modifying the document, make double click in the desired document row at the Editor applet window.

Merge files

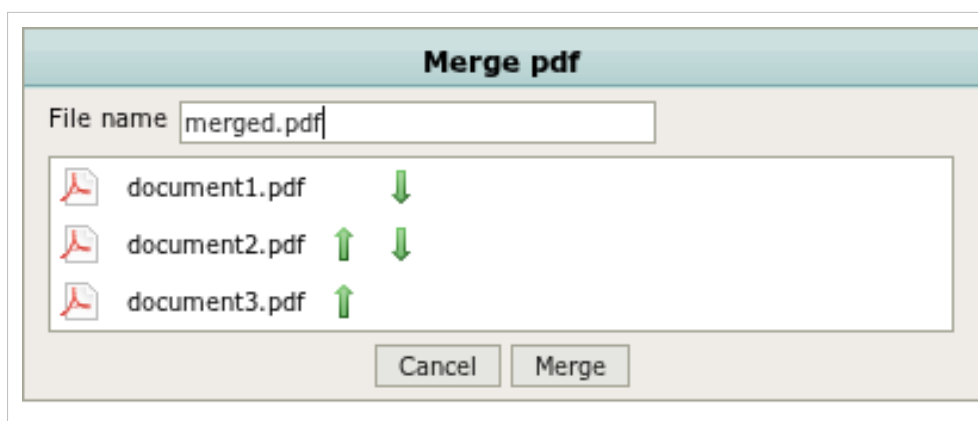
To merge files, select several pdf files.

		Name	Size	Update date	Author	Version
	<input type="checkbox"/>	OpenKM		05-07-2012 13:00:55	Administrator	
	<input type="checkbox"/>	presentaciones		05-07-2012 13:01:01	Administrator	
	<input type="checkbox"/>	proyectos		05-07-2012 13:01:10	Administrator	
	<input type="checkbox"/>	test2		06-07-2012 17:44:04	Administrator	
	<input checked="" type="checkbox"/>	document1.pdf	15.0 KB	12-07-2012 09:45:11	Administrator	1.0
	<input checked="" type="checkbox"/>	document2.pdf	15.7 KB	12-07-2012 09:45:25	Administrator	1.0
	<input checked="" type="checkbox"/>	document3.pdf	15.3 KB	12-07-2012 09:45:59	Administrator	1.0
	<input type="checkbox"/>	mail_项目后评价.txt	1.2 KB	05-07-2012 08:58:35	Administrator	1.4

Then select **Merge pdf** menu option. **Merge pdf** can be found in filebrowser contextual menu or in Edit menu.



Will be shown the merge pdf poup.



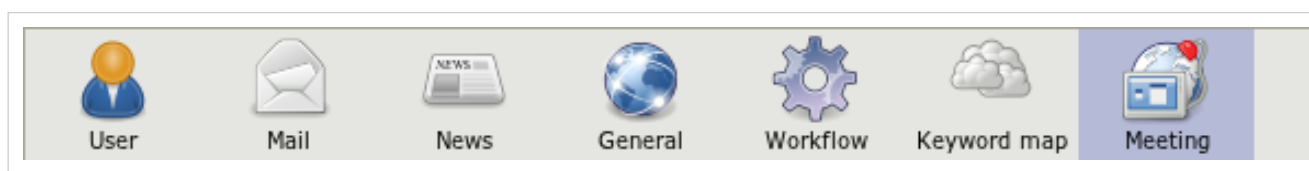
Add the new filename where will be merged pdf documents and **click at merge button**. When merge operation will be done will be shown new document with all document contents merged.

<input type="checkbox"/>		document1.pdf	15.0 KB	12-07-2012 09:45:11	Administrator	1.0
<input type="checkbox"/>		document2.pdf	15.7 KB	12-07-2012 09:45:25	Administrator	1.0
<input type="checkbox"/>		document3.pdf	15.3 KB	12-07-2012 09:45:59	Administrator	1.0
<input type="checkbox"/>		mail 项目后评价.txt	1.2 KB	05-07-2012 08:58:35	Administrator	1.4
<input type="checkbox"/>		merged.pdf	44.6 KB	12-07-2012 17:13:51	Administrator	1.0

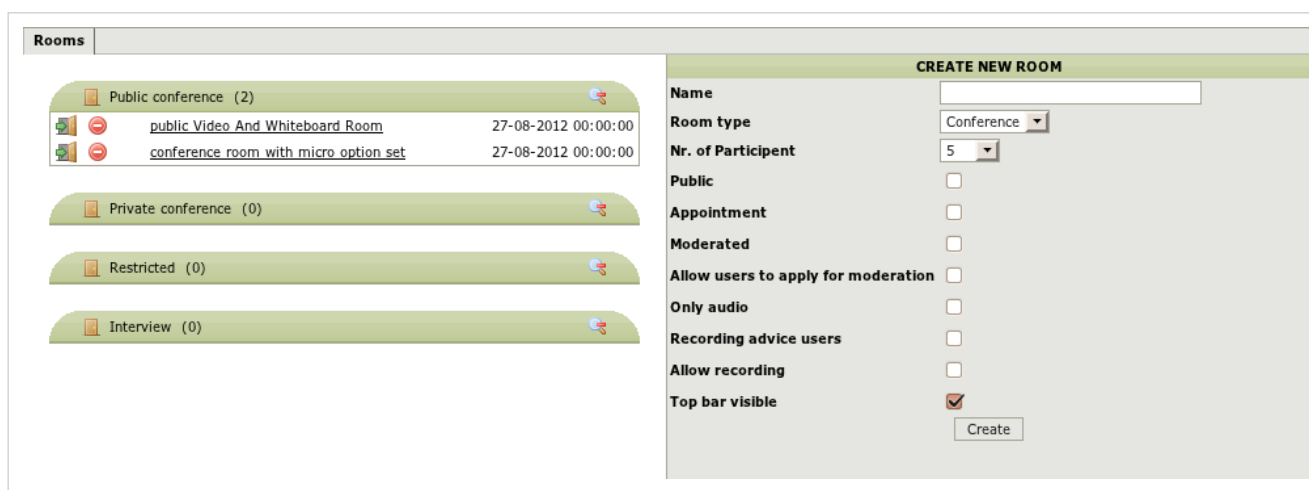
OpenMeetings

OpenKM is integrated with [OpenMeetings^[1]]. [OpenMeetings^[1]] is a free browser-based software that allows you to set up instantly a conference in the Web. You can use your microphone or webcam, share documents on a white board, share your screen or record meetings. It is available as hosted service or you download and install a package on your server with no limitations in usage or users.

In dashboard there's a icon to access meetings:



Dasboard is divided in two sections, available rooms and form to create new rooms.



Configuration

The configuration parameters are:

- openmeetings.user (openmeetings user)
- openmeetings.credentials (opemeeting password)
- openmeetings.port (openmeetings port, normally 5080)
- openmeetings.url (openmeetings url)

Key <input type="text" value="openmeeting"/>			Filter	
Key	Type	Value		
openmeetings.credentials	String	admin		
openmeetings.port	String	5080		
openmeetings.url	String	192.168.1.130		
openmeetings.user	String	admin		

Create new room

There're four room types:

- Public conference
- Private conference
- Restricted
- Interview

Each room can have additionally name, appointment, moderated or not, allow recording or not, only audio room among others parameters. Simply fill the creation form and click the add button.

CREATE NEW ROOM

Name

Room type

Conference

Nr. of Participant

5

Public

☐

Appointment

☐

Moderated

☐

Allow users to apply for moderation

☐

Only audio

☐

Recording advice users

☐

Allow recording

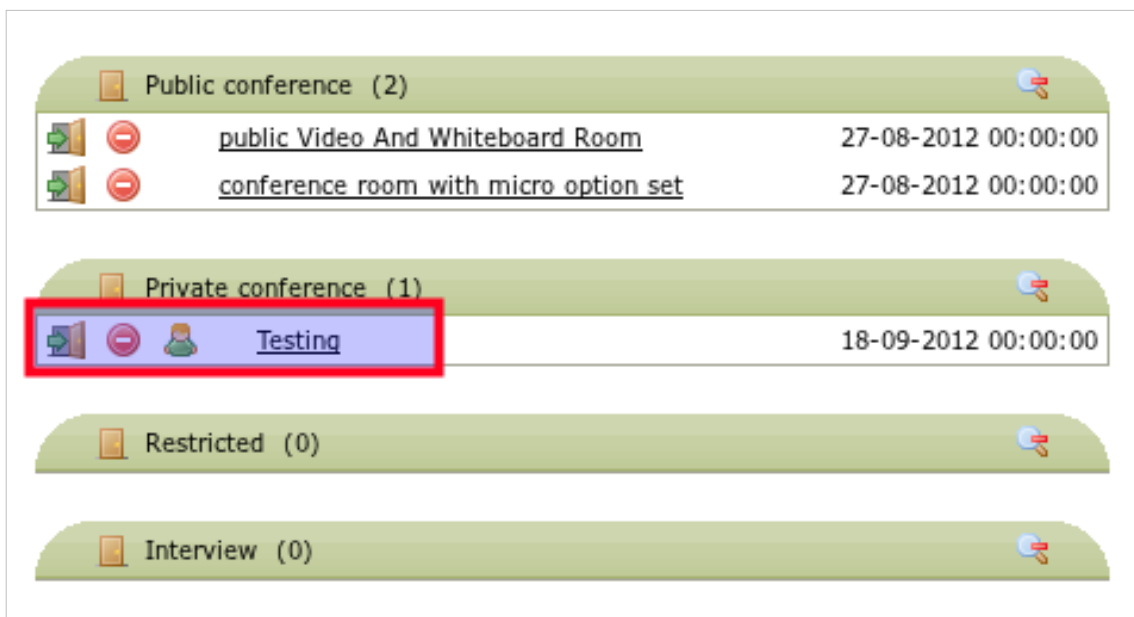
☐

Top bar visible


☒

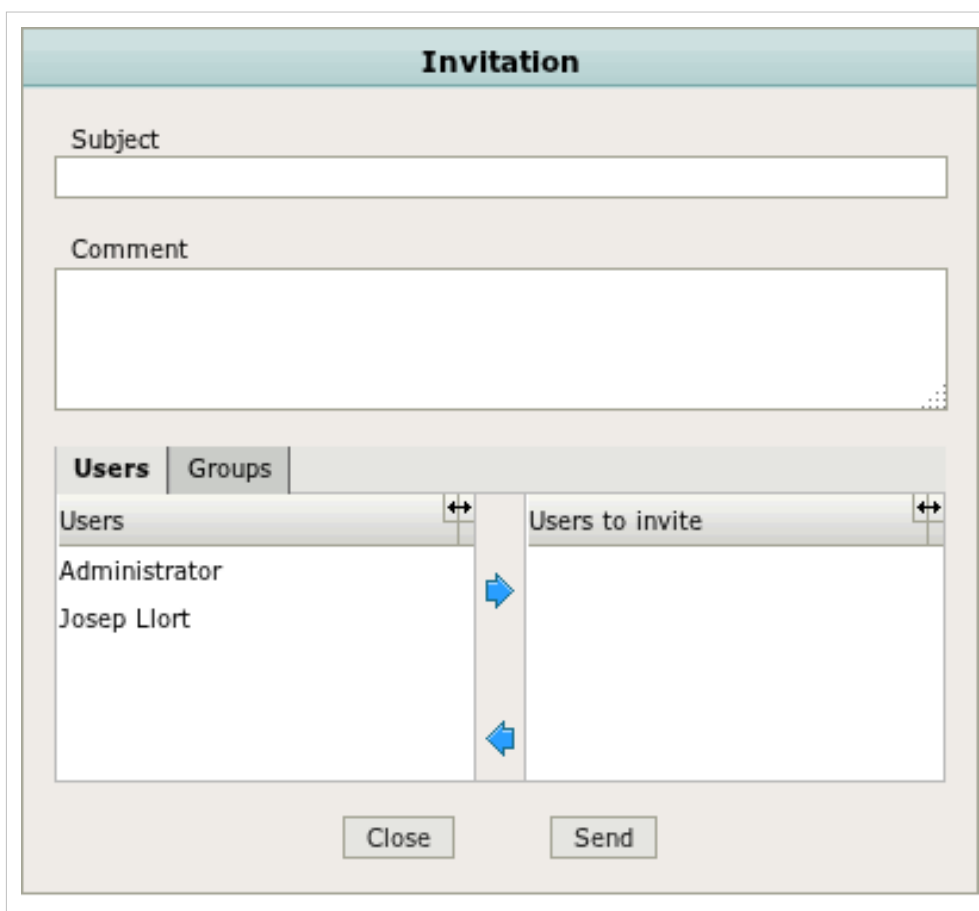
Create

After creation will be refreshed available user rooms:



Invite users

Only in user room - created by user - is allowed invite users. Simply click on user icon  will appearing invitation popup:



Select users / roles to notify, write some subject and click send button. User will receive some mail notification like this:

OpenMeetings - Invitation

Message from user: josep

Message: Testing meeting.

Click this link to participate in the conference [The link may only work for a certain period.]:

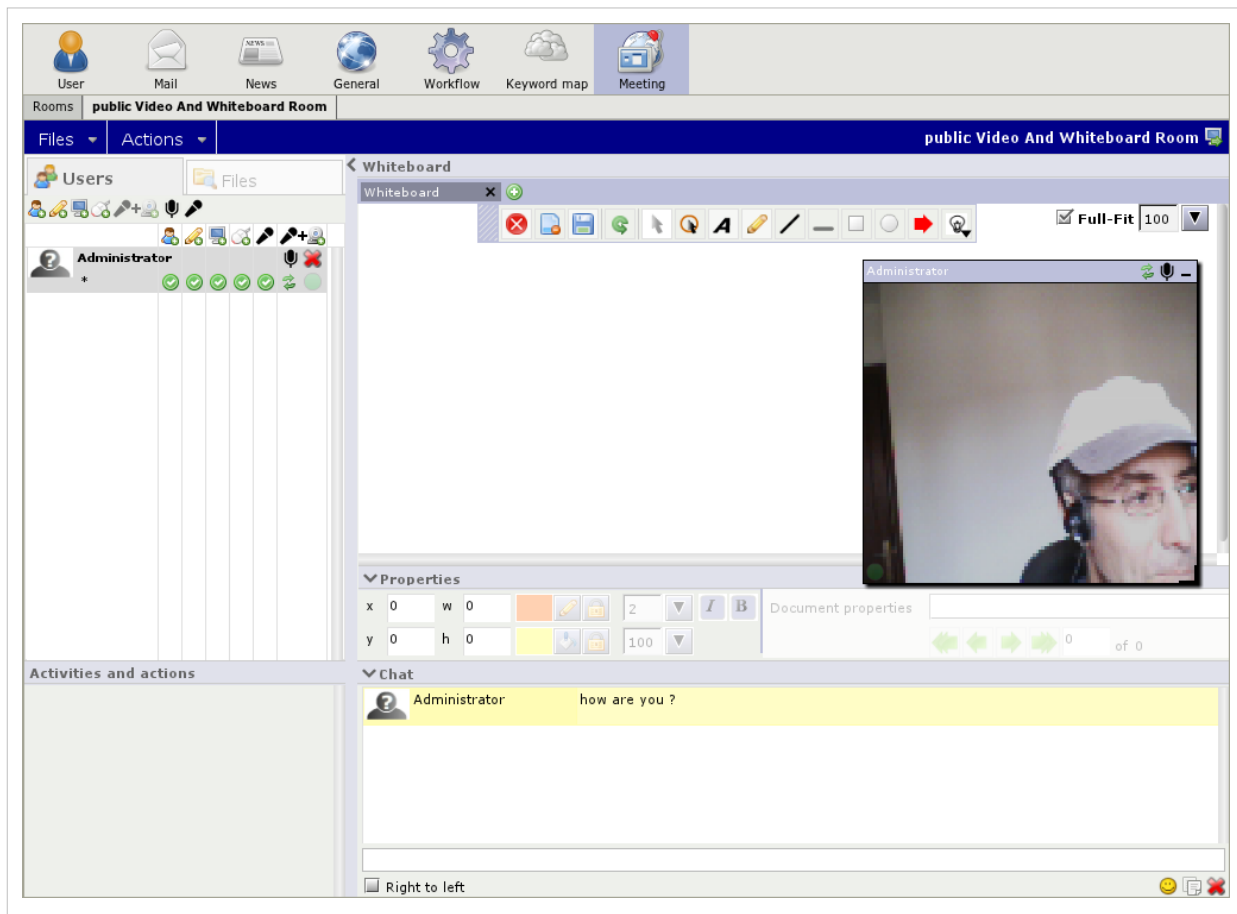
[Click here to enter room](#)

If you have problems with the link, please copy and paste this to your browser:

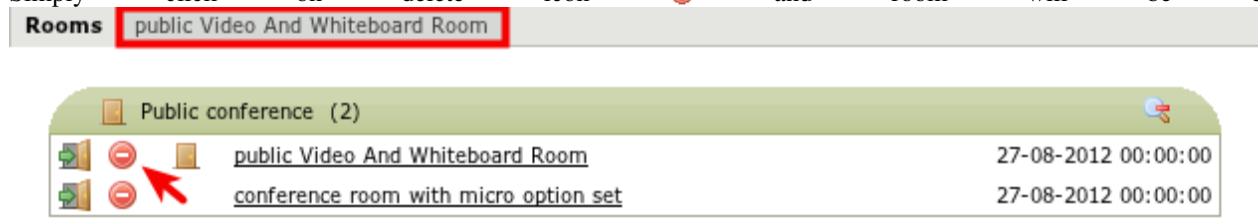
<http://192.168.1.130:5080/openmeetings?invitationHash=2073041a12211a9d7aafe3e4f551f28f&language=1>

Enter room

Simply click on room link or mail invitation link, then you'll see new room tab like this:

**Delete room**

Simply click on delete icon  and room will be deleted.



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- [1] <http://incubator.apache.org/openmeetings/>

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