



IMiS[®] /wClient
Manual
Version 1.9.2310

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1 PREFACE

This manual describes the operation of the IMiS®/wClient software product and offers advice on the technical and operational aspects of its use.

1.1 About the manual

The manual presents the web client architecture, user interface, range of actions over entities, mechanisms for verifying authenticity, report functionalities and the installation, configuring and management procedures of the IMiS®/wClient.

1.2 Target audience

Information presented by this manual is intended for users with at least intermediate understanding of computer and application use.

1.3 Conventions

The manual employs several font types to convey information. These are explained below:

Font type	Used to denote
Regular	basic text, images, tables
regular bold	chapter titles (main chapters 1-6 and subchapters)
<i>italic</i>	advice, examples, tips, instructions
"inside quotation marks"	titles of selectable functions, files or actions
<u><i>underlined italic</i></u>	see specified chapter for more information
Monospace	names of console commands, files, directories, ...
Monospace Bold	user input characters

Table 1: Manual font types and their meaning

1.4 Terms and abbreviations

Abbreviations appearing in the text and images of the user manual are explained below

Abbreviation	Description
7ZIP	7-Zip open source file archiver and format (extension «.7z«)
ACL	Access Control List
AFM	Adobe Font Metrics (extension «.afm«)
AIP	Archival Information Package
ANPA	American Newspaper Publishers Association news feed format
ATOM	Atom Syndication Format
BMP	Bitmap image file format (Windows format – extension «.bmp«)
CAD	Computer Aided Design
CHM	CHM Help format (extension «.chm«)
CPIO	cpio file archiver and format (Unix format – extension «.cpio«)
CSV	Comma Separated Value (text file format– extension «.csv«)
DMS	Document Management System
DWG	CAD file format (extension «.dwg«)
ELF	Executable and Linkable Format (Linux, Unix, Mac OS X format)
EML	EML format (RFC 822 archive standard – extension «.eml«)
EPUB	Electronic Publication Format (extension «.epub«)
EXIF	Exchangeable image file format (image metadata format)
FB2	FixtionBook format (electronic book format – extension «.fb2«)
FLV	Flash Video file format (Adobe video format – extension «.flv«)
GB	Gigabyte (information unit of 2 ³⁰ or roughly 10 ⁹ bytes)
GHz	Gigahertz (frequency unit of 10 ⁹ hertz)
GIF	Graphics Interchange Format (image format – extension «.gif«)
HDF	Hierarchical Data Format
HTML	HyperText Markup Language
ID	Identifier
IPTC	International Press Telecommunications Council News Feed Format
IPv4	Internet Protocol version 4
IPv6	Internet Protocol version 6
JPEG	Joint Photographic Experts Group format (extension «.jpg«)
LDAP	Lightweight Directory Access Protocol (Internet protocol for accessing directory)

Abbreviation	Description
MAT	Matlab data format
MB	Megabyte (information unit of 2 ²⁰ or roughly 10 ⁶ bytes)
MBOX	MBox file format (Unix email archive format)
MIDI	Musical Instrument Digital Interface
MIME	Multipurpose Internet Mail Extensions (email standard)
MP3	MP3 format (audio format – extension ».mp3«)
MP4	MP4 format (video and audio format – extension “.mp4”)
NetCDF	Network Common Data Form formats
OGG	OGG format (open source format – extension “.ogg”)
PE	Portable Executable format (Win library and program format)
PDF	Portable Document Format (extension ».pdf«)
PDF/A	Portable Document Format for archiving electronic documents
PKCS7	PCKS #7 Cryptographic Message Syntax Standard
PNG	Portable Network Graphics (image format – extension “.png”)
PSD	Adobe Photoshop file format
PST	Personal Storage Table (email storage format for Windows)
RFC	Request for Comments (technical and organizational document, specification intended for the exchange of opinions on the subject)
RSA	Ronald R ivest, Adi S hamir, Leonard A dleman (public key encryption algorithm)
RSS	Rich Site Summary / Really Simple Syndication
RTF	Rich Text Format
S/MIME	Secure Multipurpose Internet Mail Extensions (secure MIME)
SDRAM	Synchronous Dynamic Random-access Memory
SHA	Secure Hash Algorithm (digital fingerprint algorithm)
SRP-6A	Secure Remote Password revision 6A (an encryption protocol for secure user authentication)
SSL	Secure Socket Layer (collection of cryptographic protocols)
SSO	Single Sign-on (user authentication in independent systems)
TAR	Tape Archive (Unix compression format – extension “.tar”)
TCP/IP	Transmission Control Protocol / Internet Protocol (family of network protocols)

Abbreviation	Description
TIFF	Tagged Image File Format (document storage format – extension “.tif”)
TLS	Transport Layer Security
TTF	TrueType Font (Microsoft text format – extension “.ttf”)
WAV	Waveform Audio File Format (Win audio format – extension ».wav«)
W3C	World Wide Web Consortium (organization for the standardization of web techniques)
XML	Extensible Markup Language (language for structuring data in the form of a text file)
XMLDSIG	XML Signature (specification for XML encoding of electronic signatures)
ZIP	ZIP archive file format (standard archiving format – extension ».zip«)

Table 2: Definition of abbreviations

Terms used in the text and images of the manual are explained below.

Term	Description
Attribute	The attribute is the basic cell or container of metadata. It prescribes the rules and framework for the entry, maintenance and storage of metadata values belonging to an entity.
Document	The document is the basic unit of archived content on the IMiS®/ARChive Server, which can store various kinds of digital content (e.g. text, images, video). Documents are usually located inside folders, but they can also be in a class of their own.
Entity	The entity is a container of data and content on the IMiS®/ARChive Server. There are three types of entity: class, folder, and document.
Folder	Folder - a group of entities (contained folders, documents), which round off the content. It represents a dossier of the folder in question (content-related question, topic, task, project, etc.) with all of the corresponding properties and contents. For more information see chapter Entity types in the IMiS®/ARChive Server Manual .
IMiS®/ARChive Server	IMiS®/ARChive Storage Server (archive server for document storage)
IMiS®/Scan	IMiS®/Scan client (IMiS® application for scanning paper documents)

IMiS®/Storage Connector	IMiS®/Storage Connector interface (interface for the transfer of archived objects between applications and archive servers)
IMiS®/View	IMiS®/View client (IMiS® client for viewing scanned documents)
Linux	Various open source operating systems similar to Unix.
Mac OS X	Apple operating system, based on Unix.
Metadata	Metadata represents "information about information" or "data about data" that is the object of storage.
Microsoft .NET Framework	Microsoft environment for the development of web services and other software components.
Microsoft Excel	Standard MS spreadsheet software that can also be used to view CSV files.
Class	The class is the basic constituent part of content organization on the IMiS®/ARChive Server. Classes can store folders or documents, e.g. according to the type or the owner of documents stored inside.
Template	The template prescribes the metadata scheme – the required and allowed attributes for entity creation. Each template contains built-in and predefined system attributes.
Unix	A family of computer operating systems that are based on the original Unix OS developed by Bell Labs.
Windows	Microsoft operating system.

Table 3: List of terms used in the manual

2 INTRODUCTION

2.1 Features

IMiS®/wClient is web client intended for the capture and management of content of electronic origin or content digitalized using scan procedures. The client operates directly with the IMiS®/ARChive Server, which ensures secure long-term storage of documents and archived content along with the corresponding metadata.

Users access the content from any web browser via the web client IMiS®/wClient.

Content is structured by the classification scheme, which sorts materials according to their subject, authority, activity, and the business and expert functions of corresponding personnel within the company.

Entities follow a hierarchical order (classes, folders, documents), with practically unlimited sub-levels specified according to need. Each entity in the archive has its own unique classification code.

Secure authentication of a local archive user is enabled via the username and password of the user, registered in the external directory, which is synchronized with the archive server via LDAP. Secure authentication is provided by username and password, along with all the current technological means of protection from unauthorized data access.

Content security is ensured through unique identifiers (ID), which are assigned to each entity and document when it is being stored on the IMiS®/ARChive Server. The identifiers are encrypted and prevent unauthorized access, viewing or deletion.

Managing the users' access rights to entities and metadata is a key concept for ensuring the confidentiality and integrity of archived content, along with appropriate availability.

Users are limited to accessing those entities; they have been authorized to access according to the security class of the document and the security class level of the user, which are both dictated by the access control list (ACL).

The audit log records all instances of server access, along with all the events and changes performed on the server. Throughout its entire life cycle, it is impervious to modification and protected from any interventions, whether authorized or not.

One of the most practical functionalities of the electronic archive is searching by metadata or searching the full text of stored content. Users may perform search functions on the complete archive, or on any selected entity.

The IMiS®/wClient can be connected to many IMiS®/ARChive Servers, which facilitates the capture and management of electronic content of several separate organizational units on a single location.

2.2 Versioning and numbering

The version of the IMiS®/wClient can be read from the name of the installation package, which appears according to this scheme:

IMiS.wClient.MAJOR.MINOR.RELEASE.BUILD.zip

The example of installation package name:

IMiS.wClient.1.9.2310.zip

The scheme consists of the name of the IMiS® module (IMiS.Client) and the following elements:

- MAJOR: marks a major/central version of the IMiS® module, which changes least frequently. Changes indicate a new generation of module that introduces major functionality changes compared to the previous version. The identifier has values ranging from 1-n which grow in successive numbers.
- MINOR: marks a minor version of the IMiS® module, which changes more frequently. Changes indicate fixes and minor changes to functionalities, and fixes to the generation of module marked by the MAJOR version. The values range from 1-n, are not always successive and revert back to the base value (1) with each change of the MAJOR version.
- RELEASE: marks the release version. Unlike the other value ranges, the IMiS® module release date follows a YYMM scheme, where MM marks the release month (range 01-12) and YY marks the final two digits of the year.
- BUILD: The identifier in this position indicates the unique serial number of the product build; this number never repeats. If smaller changes are made to the product within a single month, this identifier may change. In this case, all other identifiers remain the same. The range of values is from 1 to n. This number is not continuous and can only increase.

2.3 Functionalities

The basic functionalities of the IMiS®/wClient are as follows:

- Access to any of IMiS®/ARChive Servers from any web browser.
- Secured communication with the IMiS®/ARChive Server via SSL/TLS protocol.
- Secure user authentication (SRP-6A, LDAP).
- Simple user authentication via Single Sign-on (SSO) mode.
- Access to the records according to a predetermined classification scheme.
- Editing of access permissions for entities, attributes of directory entity type and metadata.
- Entry and management of the records metadata according to a predetermined attribute scheme.
- Content management (capturing, viewing data, saving, previewing, downloading, updating, copying, moving, deleting, tagging for later indexing or conversion).
- Document versioning.
- Storage of archive materials of electronic origin or digitized using the scanner.
- Streaming-mode access to the records.
- Audit log that records every operation performed over the records stored on the archive server (includes date and time, user name, name of computer, type of event, reason for action taken).
- Secure audit log viewing for authorized users.
- Search by metadata and search full text of stored content.
- Sorting of entities according to the values of the categorized attributes (categorized views).
- Establishing of connections between different entities (references).
- Management of retention policies and disposition holds for the records.
- Making reports on folders, documents, document contents, retention, reviews, accesses, the classification scheme, entities, deleted entities, and entities to be deleted.
- Support for IPv4 and IPv6 network communication systems.

2.4 New functionalities in this version

We have implemented the following new functionalities and improvements to the previous certified version 1.8.2210 of the IMiS®/wClient module:

New functionalities:

- Exports an entity collection in the CSV format.
- The timestamped attribute.

Improvements:

- Shows the container title when moving content to the system container.
- Shows the icon with closed documents on the list.
- Selecting a document from the content copy list.

Small improvements:

- Framework upgraded to Angular 16 and PrimeNG 16.

3 TECHNICAL DOCUMENTATION

3.1 Client architecture

IMiS®/wClient is the user component of an electronic and physical records management system. The client connects to the web service IMiS®/Storage Connector Services REST, which represents the service level of the interface of the IMiS®/Storage Connector. The latter can be connected to many IMiS®/ARChive Servers.

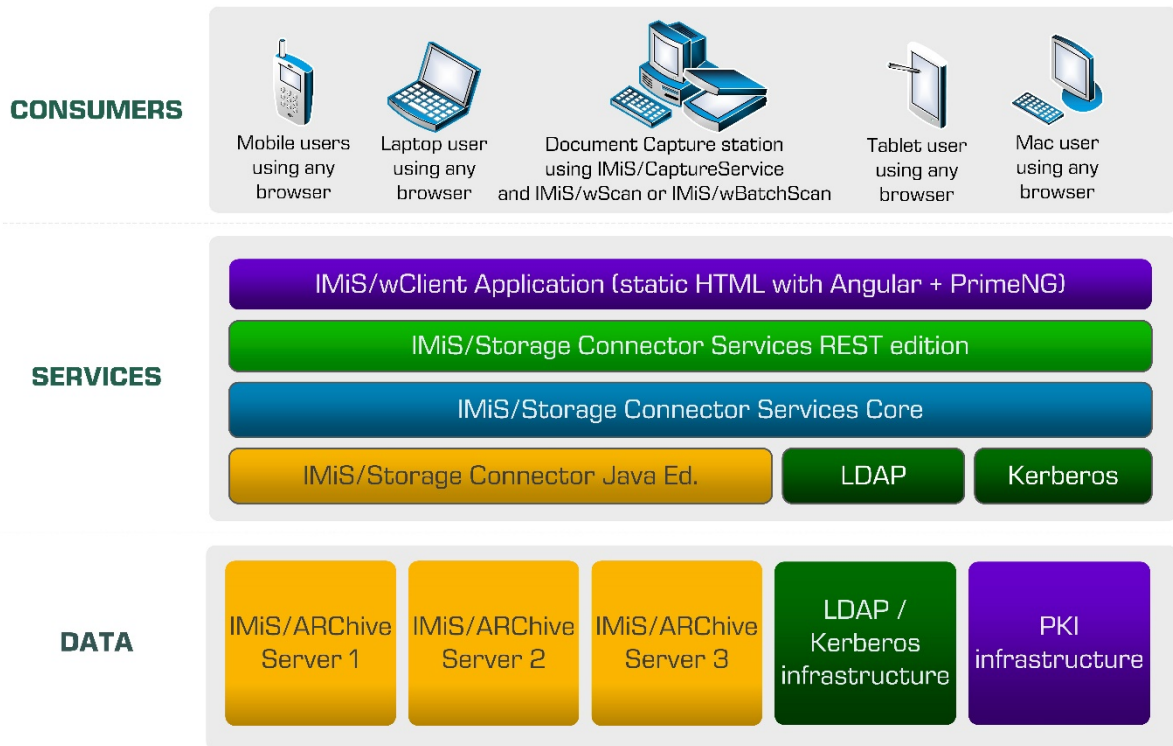


Image 1: Client architecture

3.2 Format of import / export files

The format of the import, export and data transfer files on the IMiS®/ARChive Server is the XML file, structured according to a partly modified Moreq2 scheme.

The differences between XML and Moreq2 schemes are as follows:

- Attributes which are required (mandatory) in the Moreq2 scheme and are not supported by the servers change from required to optional.
- All attributed in the "Custom" part of the XML scheme are newly added.

Moreq2 documentation is thus only a supplemental explanation of the attributes in the data transfer server scheme. Various types of entities (class, folder, document) are each covered by their separate scheme.

Since the schemes are derived from the Moreq2 standard, the following terminology is used:

Item type	Moreq2
Class	Class
Folder	Folder
Item inside folder	Sub-File
Document	Record

Table 4: Terminology explanation

The description of XML tags uses XPath notation for a clearer overview.

Example:

```
<?xml version="1.0" encoding="utf-8"?>
  <Class xmlns:xsd="http://www.w3.org/2001/XMLSchema"
  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance
  xmlns="http://www.dlm-network.org/moreq2/1.04.01">
    <Description xmlns="">
      <abstract />
      <classification>
        <classification_code>08</classification_code>
        <fully_qualified_classification_code>08</fully_qualified_classification_code>
      </classification>
      <place />
      <title>Balance sheet Q3 2018 </title>
```

...

Image 2: XPath notation text example

In the above example, the path to a full classification-code in XPath notation would be shown by the following description:

/Class/classification/fully_qualified_classification_code.

3.2.1 File structure

Each entity is contained by its own XML file. The filename must be in the following format:

[class|file|sub-file|record]_audit_n.xml (the sequence number is identical to the sequence number of the entity). When importing data, it is important for all files of a given entity to be located in the same directory as the entity file.

The names of remaining files are contained in corresponding XML tags (chapter [List of XML tags and their meaning](#)).

Example: When exporting a class, the file containing the class is named `class_1.xml`, and the audit log file for the class is named `class_1_audit.xml`.

3.2.2 List of XML tags and their meaning

The following section lists the supported tags, along with references to server documentation of the IMiS®/ARChive Server. The meaning of XML tags on the server and their reference to the Moreq2 code is presented in more detail. Every XML document begins with the root node, which describes the type (class, folder, sub-folder, document).

Since the scheme is derived from the Moreq2 scheme, it uses the Moreq2 terminology (Class, File, Sub-File, Record) which is explained in table 4 found above.

For better clarity, the name of the root node in the presentation below is swapped with »<entity_type>«. In case the user is interested in an entity whose type is class, user can replace »/<entity_type>« with »/Class« and only view tags that use »Class: YES«.

/<entity_type>

	Required:	YES	Number:	1
Definition:	Root node			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:	Uses entity types according to MOREQ2 standard (Class, File, Sub-File, Record).			
XMLSchema type:	complexType	Reference:	/	MOREQ2 code: /

/<entity_type>/Description/abstract/description

	Required:	NO	Number:	1
Definition:	Entity description			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: NO
Commentary:	Optional short description of the entity. This attribute has no influence on the business logic of the server during operations with entities and is merely an information carrier.			
XMLSchema type:	String	Reference:	sys:Description	MOREQ2 code: M047

/<entity_type>/Description/abstract/keyword

	Required:	NO	Number:	Multiple
Definition:	Keyword			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:	Optional keywords that define the entity. This attribute has no influence on the business logic of the server during operations with entities and is merely an information carrier.			
XMLSchema type:	String	Reference:	sys:Keywords	MOREQ2 code: M004

/<entity_type>/Description/abstract/classification/classification_code

	Required:	YES	Number:	1
Definition:	Own classification code			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:	The own classification code is unique among all entities that are subordinate (child) to the same entity.			
XMLSchema type:	String	Reference:	Classification code	MOREQ2 code: M011

/<entity_type>/Description/abstract/classification/fully_qualified_classification_code

	Required:	YES	Number:	1
Definition:	Full classification code			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:	The full classification code is unique for the entire archive and consists of the full classification code of the parent entity, and the entity's own classification code.			
XMLSchema type:	String	Reference:	Classification codes	MOREQ2 code: M012

/<entity_type>/Description/copy_recipient/e_mail_address

	Required:	YES	Number:	Multiple
Definition:	Mail address of email copy recipient			
Use:	Class: NO	Folder: NO	Sub-File: NO	Record: YES
Commentary:	Values represent valid email addresses of email copy recipients. They are forwarded by the messaging client, which usually acquires them from the message itself, though the precision of the information depends on the client. Values represent the values of attributes »cc« of the message according to RFC 2822 specification.			
XMLSchema type:	String	Reference:	sys:eml:ToCC	MOREQ2 code: M185

/<entity_type>/Description/copy_recipient/name

	Required:	YES	Number:	Multiple
Definition:	Name of email copy recipient			
Use:	Class: NO	Folder: NO	Sub-File: NO	Record: YES
Commentary:	Values represent names of email copy recipients. They are forwarded by the messaging client, which usually acquires them from the message itself, though the precision of the information depends on the client. Values represent the values of attributes »cc« of the message according to RFC 2822 specification.			
XMLSchema type:	String	Reference:	sys:eml:ToCC	MOREQ2 code: M067

/<entity_type>/Description/date

	Required:	NO	Number:	1
Definition:	Message date			
Use:	Class: NO	Folder: NO	Sub-File: NO	Record: YES
Commentary:	The metadata is acquired from the message itself or entered when adding the message to the document system. It is used only in case of email messages and is filled out with the »sent« date.			
XMLSchema type:	DateTime	Reference:	sys:eml:Date	MOREQ2 code: M065

/<entity_type>/Description/external_identifier/external_system_reference

	Required:	NO	Number:	1
Definition:	Unique message identifier			
Use:	Class: NO	Folder: NO	Sub-File: NO	Record: YES
Commentary:	This value represents the unique external identifier of the email message, assigned by the messaging server upon delivery. The value is forwarded by the messaging client, which usually acquires it from the message itself, though the precision of the information depends on the client. Values represent the values of the attribute »message-id« of the message according to RFC 2822 specification.			
XMLSchema type:	String	Reference	sys:eml:MessageId	MOREQ2 code: M195

/<entity_type>/Description/place/current_location

	Required:	NO	Number:	1
Definition:	Current location of physical records			
Use:	Class: NO	Folder: YES	Sub-File: YES	Record: YES
Commentary:	The value represents a description of the current location of physical records, when this is not a home location or when physical records is checked out or entrusted to a third party for storage. Enter data that describes the external location of physical records as precisely as possible (address, room, cabinet, folder ...). At the same time, make the appropriate modification of the attribute "prm:Status" into "CheckedOut".			
XMLSchema type:	String	Reference:	sys:prm:CurrentLocatio n	MOREQ2 code: M086

/<entity_type>/Description/place/home_location

	Required:	NO	Number:	1
Definition:	Home location of physical records			
Use:	Class: NO	Folder: YES	Sub-File: YES	Record: YES
Commentary:	This value represents a description of the home location of physical records. Enter data that precisely describes the in-house location where the physical records is being stored (address, room, cabinet, folder, file ...).			
XMLSchema type:	String	Reference:	sys:prm:HomeLocation	MOREQ2 code: M122

/<entity_type>/Description/recipient/e_mail_address

	Required:	NO	Number:	Multiple
Definition:	Email address of email recipient			
Use:	Class: NO	Folder: NO	Sub-File: NO	Record: YES
Commentary:	Values represent the valid email addresses of email recipients. They are forwarded by the messaging client, which usually acquires them from the message itself, though the precision of the information depends on the client. Values represent the values of attributes »to« of the message according to RFC 2822 specification.			
XMLSchema type:	String	Reference:	sys:eml:To	MOREQ2 code: M186

/<entity_type>/Description/recipient/name

	Required:	NO	Number:	Multiple
Definition:	Name of email recipient			
Use:	Class: NO	Folder: NO	Sub-File: NO	Record: YES
Commentary:	Values represent valid names of email recipients. They are forwarded by the messaging client, which usually acquires them from the message itself, though the precision of the information depends on the client. Values represent the values of the attribute »to« of the message according to RFC 2822 specification.			
XMLSchema type:	String	Reference:	sys:eml:To	MOREQ2 code: M066

/<entity_type>/Description/sender/e_mail_address

	Required:	NO	Number:	Multiple
Definition:	Email address of email sender			
Use:	Class: NO	Folder: NO	Sub-File: NO	Record: YES
Commentary:	This value represents a valid email address of the email sender. It is forwarded by the messaging client, which usually acquires it from the message itself, though the precision of the information depends on the client. The value represents the value of the attribute »from« of the message according to RFC 2822 specification.			
XMLSchema type:	String	Reference:	sys:eml:From	MOREQ2 code: M187

/<entity_type>/Description/sender/name

	Required:	NO	Number:	Multiple
Definition:	Name of the email sender			
Use:	Class: NO	Folder: NO	Sub-File: NO	Record: YES
Commentary:	This value represents the valid name of the email sender. It is forwarded by the messaging client, which usually acquires it from the message itself, though the precision of the information depends on the client. The value represents the value of the attribute »from« of the message according to RFC 2822 specification.			
XMLSchema type:	String	Reference:	sys:eml:From	MOREQ2 code: M075

/<entity_type>/Description/title

	Required:	YES	Number:	1
Definition:	Title of the entity			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:	The mandatory title of the entity being described.			
XMLSchema type:	String	Reference:	sys:Title	MOREQ2 code: M003

/<entity_type>/Event_history/abstract/reclassification_reason

	Required:	NO	Number:	1
Definition:	Commentary stating the reason for moving (reclassifying) an entity			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:				
XMLSchema type:	String	Reference:	sys:moveReason	MOREQ2 code: M021

/<entity_type>/Event_history/date/checked_in

	Required:	NO	Number:	1
Definition:	Date and time of change of attribute "prm:Status" to "CheckedIn"			
Use:	Class: NO	Folder: YES	Sub-File: YES	Record: YES
Commentary:	The value represents the date and time when the attribute "prm:Status" of the entity in question received the value "CheckedIn".			
XMLSchema type:	dateTime	Reference:	sys:prm:Status	MOREQ2 code: M093

/<entity_type>/Event_history/date/checked_out

	Required:	NO	Number:	1
Definition:	Date and time of change of attribute »prm:Status« to »CheckedOut«			
Use:	Class: NO	Folder: YES	Sub-File: YES	Record: YES
Commentary:	The value represents the date and time when the attribute "prm:Status" of the entity in question received the value "CheckedOut".			
XMLSchema type:	dateTime	Reference:	sys:prm:Status	MOREQ2 code: M094

/<entity_type>/Event_history/date/closed

	Required:	NO	Number:	1
Definition:	Date and time of change of attribute »sys:Status« to »Closed«			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:	The value represents the date and time when the attribute »sys:Status« of the entity in question received the value »Closed«.			
XMLSchema type:	dateTime	Reference:	sys:Closed	MOREQ2 code: M051

/<entity_type>/Event_history/date/created

	Required:	YES	Number:	1
Definition:	Date and time of the entity's creation			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:	The value represents the date and time when the entity was created.			
XMLSchema type:	dateTime	Reference:	sys:Created	MOREQ2 code: M048

/<entity_type>/Event_history/date/opened

	Required:	YES	Number:	1
Definition:	Date and time of change of attribute »sys:Status« to »Opened«			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:	The value represents the date and time when the attribute "sys:Status" of the entity in question received the value »Opened« (chapter General system attributes).			
XMLSchema type:	dateTime	Reference:	sys:Opened	MOREQ2 code: M050

/<entity_type>/Event_plan/date/return

	Required:	NO	Number:	1
Definition:	Return date and time of checked out physical record			
Use:	Class: NO	Folder: YES	Sub-File: YES	Record: YES
Commentary:	This value represents the status of physical record according to its current storage location. It is specified/changed in case physical record is checked out or transferred to a thirty party that stores it at a remote location.			
XMLSchema type:	dateTime	Reference:	sys:prm:ReturnDue	MOREQ2 code: M098

/<entity_type>/Event_plan/status/permanent

	Required:	YES	Number:	1
Definition:	States this entity should not be deleted			
Use:	Class: NO	Folder: YES	Sub-File: YES	Record: YES
Commentary:	This value states the entity should not be deleted, neither through an admin request nor in the review process. The value is merely a warning, and the administrator can choose to disregard it at their own discretion. The value "sys:Significance" of the coded entity is »Permanent« or »Vital«.			
XMLSchema type:	Boolean	Reference:	sys:Significance	MOREQ2 code: M031

/<entity_type>/Identity/system_identifier

	Required:	YES	Number:	1
Definition:	Unique system identifier			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:	Assigned by the IMiS®/ARChive Server.			
XMLSchema type:	String	Reference:	Internal entity identifier	MOREQ2 code: M020

/<entity_type>/Relation/agent/custodian

	Required:	NO	Number:	1
Definition:	States the current custodian of physical record			
Use:	Class: NO	Folder: YES	Sub-File: YES	Record: YES
Commentary:	The value represents the identity of the current custodian of physical record. When record is stored at a home location (value of the attribute "prm:Status" is "CheckedIn"), this is the person safekeeping the physical record. When it is stored remotely (value of the attribute "prm:Status" is "CheckedOut"), it is the outside person who was entrusted with safekeeping the checked out record.			
XMLSchema type:	String	Reference:	sys:prm:Custodian	MOREQ2 code: M002

/<entity_type>/Relation/agent/owner

	Required:	YES	Number:	1
Definition:	Person who is the current owner of the entity			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:	The value represents the directory subject (user or group) the entity belongs to (the owner of the entity).			
XMLSchema type:	String	Reference:	sys:Owner	MOREQ2 code: M002

/<entity_type>/Relation/is_child_of

	Required:	YES	Number:	1
Definition:	Full classification code of the parent entity			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:				
XMLSchema type:	String	Reference:	Classification code	MOREQ2 code: M057

/<entity_type>/Relation/retention_and_disposition_schedule

	Required:	YES	Number:	Multiple
Definition:	Unique system identifier of the retention policy			
Use:	Class: YES	Folder: YES	Sub-File: YES	Document: Conditionally
Commentary:	A link to the retention policy is required for the class, folder and document if it is classified directly under the class.			
XMLSchema type:	String	Reference:	Entity binds	MOREQ2 code: M025

/<entity_type>/Relation/disposal_hold

	Required:	NO	Number:	Multiple
Definition:	Unique system identifier of the disposition hold			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:				
XMLSchema type:	String	Reference:	Entity binds	MOREQ2 code: M032

/<entity_type>/Use/status/active

	Required:	YES	Number:	1
Definition:	Entity is active			
Use:	Class: YES	Folder: YES	Sub-File: NO	Record: NO
Commentary:	"true" when the attribute "sys:Status" of the entity in question has the value "Opened" (chapter General system attributes).			
XMLSchema type:	Boolean	Reference:	sys:Status	MOREQ2 code: M019

/<entity_type>/Use/status/physical

	Required:		NO	Number:	1
Definition:	Physical content tag				
Use:	Class: NO		Folder: YES	Sub-File: YES	Record: YES
Commentary:	"true" when this is physical record, »false« or no value when it is not				
XMLSchema type:	Boolean		Reference:	Physical records management attributes	MOREQ2 code: M084

/<entity_type>/Use/status/vital_record

	Required:	YES	Number:	1
Definition:	States this entity is of vital importance to the archive owner			
Use:	Class: NO	Folder: YES	Sub-File: NO	Record: YES
Commentary:	States that this entity is of vital importance. Deleting it by administrator's request or in the review process is prohibited. The entity may also follow a special data safety regime.			
XMLSchema type:	Boolean	Reference:	sys:Significance	MOREQ2 code: M005

/<entity_type>/Use/technical_environment/format

	Required:	NO	Number:	1
Definition:	Contains a description of physical record			
Use:	Class: NO	Folder: YES	Sub-File: YES	Record: YES
Commentary:	The value represents a description of the physical record. Enter a precise description of the physical record, its format, physical carriers, volume ...			
XMLSchema type:	String	Reference:	sys:prm:Description	MOREQ2 code: M092

/<entity_type>/Custom/acl

	Required:	NO	Number:	1
Definition:	List of access rights and metadata on the entity (Access Control List)			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:	The label "acl" contains data about the list of access rights and metadata on the entity, that are not a part of the Moreq2 specification. Individual entries in the list of access rights are found in the contained "entry" labels.			
XMLScheme type:	complexType	Reference:	ACL	MOREQ2 code: /

/<entity_type>/Custom/acl/entry

	Required:	YES	Number:	Multiple
Definition:	List of access rights and metadata on the entity (Access Control List)			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES

<p>Commentary:</p>	<p>The entry in the list of access rights for an entity does not contain values, but it does contain an XML “user” attribute with the name of the directory's entity, and the following XML attributes that specify which access rights are valid for the directory's entity:</p> <ul style="list-style-type: none"> • type: enumerator of the type of access right (see below). • cr: right to edit access rights list.+- • cse: right to create new child entities. • da: right to delete the entity. • mv: right to move the entity. • ra: right to read the entity. • wa: right to edit the entity. • cre: right to change storage. • csc: right to change security class. • cs: right to change status. • date_from: date of current access control list validity (start / valid from). • date_to: date of current access control list validity (end / valid to). <p>The entry in the list of access rights for the entity's metadata contains an XML “user” attribute with the name of the directory's entity, an XML “property” attribute with the name of the metadata, and the following XML attributes that specify which access rights are valid for the directory's entity:</p> <ul style="list-style-type: none"> • type: enumerator of the type of right (see below). • ca: right to create the value of the entity's metadata. • da: right to delete the value of the entity's metadata. • ra: right to read the value of the entity's metadata. • wa: right to edit the value of the entity's metadata. • date_from: start of validity of the current list of access rights. • date_to: end of validity of the current list of access rights. <p>Description of enumerator values for the type of access right:</p> <ul style="list-style-type: none"> • EXPLICIT_ALLOW: explicit permission. • EXPLICIT_DENY: explicit denial. • INHERITED_ALLOW: inherited permission. • INHERITED_DENY: inherited denial. 				
<p>XMLScheme type:</p>	<p>none</p>	<p>Reference:</p>	<p>ACL</p>	<p>MOREQ2 code:</p>	<p>/</p>

/<entity_type>/Custom/additional_metadata

	Required:	NO	Number:	1
Definition:	User entered metadata			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:	User entered metadata necessary for managing the archive. This data is not prescribed by the IMiS®/ARChive Server and is input by the user according to requirements. Additional metadata is intended for export only and is ignored in case of import.			
XMLSchema type:	any	Reference:	ETZ: 3.5.3.8 MOREQ2: 5.3.17	MOREQ2 code: /

/<entity_type>/Custom/audit_trail

	Required:	NO	Number:	1
Definition:	Name of the audit trail file			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:	The name of the separate file that contains the audit trail. To verify the file's authenticity, an XML attribute "hash_algorithm" of the type »string« which contains the name of the hash algorithm, and the XML attribute »hash« which contains the hash value of the exported audit trail, are added.			
XMLSchema type:	String	Reference:	Audit trail	MOREQ2 code: /

/<entity_type>/Custom/Content

	Required:	NO	Number:	1
Definition:	Container of attached content (files)			
Use:	Class: NO	Folder: NO	Sub-File: NO	Record: YES
Commentary:	The "content" label contains at least one "part" label, which represents exactly one document content and an XML "hash_algorithm" attribute that contains the name of the hash function, which is used when calculating the hash value of the exported content.			
XMLSchema type:	complexType	Reference:	sys:Content	MOREQ2 code: /

/<entity_type>/Custom/content/part

	Required:	NO	Number:	Multi
Definition:	Container of attached content (files)			
Use:	Class: NO	Folder: NO	Sub-File: NO	Record: YES
Commentary:	<p>The »part« label contains the name of a separate file, which contains exactly one exported document content, and the following XML attributes:</p> <ul style="list-style-type: none"> • description: content description • mime: data on content type • extension: extension of the attached content • size: content size • accessed: timestamp of the last access to the content • created: timestamp of the content creation • modified: timestamp of the last change of the content <p>hash: hash value of the content that is used for verifying the authenticity of a separate file.</p>			
XMLSchema type:	String	Reference:	ContentPart	MOREQ2 code: /

/<entity_type>/Custom/email

	Required:	NO	Number:	1
Definition:	Email metadata (names and values)			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:	The "email" label contains email metadata and the values that are not a part of the Moreq2 specification.			
XMLSchema type:	complexType	Reference:	"eml:" attributes	MOREQ2 code: /

/<entity_type>/Custom/email/subject

	Required:	NO	Number:	1
Definition:	Email subject			
Use:	Class: NO	Folder: NO	Sub-File: NO	Record: YES
Commentary:	The "subject" label contains the subject of the email.			
XMLSchema type:	String	Reference:	sys:eml:Subject	MOREQ2 code: /

/<entity_type>/Custom/email/blind_copy_recipient/e-mail_address

	Required:	NO	Number:	Multi
Definition:	The email address of the hidden recipient of the email copy			
Use:	Class: NO	Folder: NO	Sub-File: NO	Record: YES
Commentary:	The values represent valid email addresses of hidden recipients of the email copies. The values are transmitted by the client and are usually obtained from the email, although the accuracy of this information depends on the client. The values represent the values from the »bcc« attribute of the message according to the RFC 2822 specification.			
XMLSchema type:	String	Reference:	sys:eml:ToBCC	MOREQ2 code: /

/<entity_type>/Custom/email/blind_copy_recipient/name

	Required:	NO	Number:	Multi
Definition:	The name of the hidden recipient of the email copy			
Use:	Class: NO	Folder: NO	Sub-File: NO	Record: YES
Commentary:	The values represent the names of hidden recipients of the email copies. The values are transmitted by the client and are usually obtained from the email, although the accuracy of this information depends on the client. The values represent the values from the »bcc« attribute of the message according to the RFC 2822 specification.			
XMLSchema type:	String	Reference:	sys:eml:ToBCC	MOREQ2 code: /

/<entity_type>/Custom/email/priority

	Required:	NO	Number:	1
Definition:	Contains the priority status when sending email			
Use:	Class: NO	Folder: NO	Sub-File: NO	Record: YES
Commentary:	The "priority" label contains the priority status when sending email.			
XMLSchema type:	String	Reference:	sys:eml:Priority	MOREQ2 code: /

/<entity_type>/Custom/email/signed

	Required:	NO	Number:	1
Definition:	The value indicates whether the email was electronically signed			
Use:	Class: NO	Folder: YES	Sub-File: NO	Record: YES
Commentary:	The "signed" label contains the value that indicates whether the email has been electronically signed.			
XMLSchema type:	Boolean	Reference:	sys:eml:Signed	MOREQ2 code: /

/<entity_type>/Custom/Evidence

	Required:	NO	Number:	1
Definition:	Evidence of entity's authenticity			
Use:	Class: NO	Folder: YES	Sub-File: YES	Record: YES
Commentary:	<p>The value represents an evidence record of the entity's authenticity obtained from the previous ISDM in case of import. In case of export from ISDM, the data is exported into a metadata scheme and a third ISDM can again import it into the attributes of transferred entities. The attribute does not influence the business logic of the server, it serves merely as a carrier of information.</p> <p>Two XML attributes are contained:</p> <ul style="list-style-type: none"> • Hash_algorithm: »string« type containing the name of the hash algorithm. • Hash: hash value of file with the authenticity evidence. <p>The value of the XML tag contains the name of the authenticity evidence file.</p>			
XMLSchema type:	String	Reference:	sys:trf:Evidence	MOREQ2 code: /

/<entity_type>/Custom/physical_identifier

	Required:	NO	Number:	1
Definition:	Identifier of the metadata of physical material			
Use:	Class: NO	Folder: YES	Sub-File: YES	Record: YES
Commentary:	The label "physical_identifier" contains the identifier of the metadata of physical material.			
XMLSchema type:	String	Reference:	Physical content	MOREQ2 code: /

/<entity_type>/Custom/properties

	Required:	NO	Number:	1
Definition:	Other entity attributes together with values			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:	The "properties" label contains at least one "property" label, which represents the entity attributes together with values that are not a part of the Moreq2 specification.			
XMLSchema type:	complexType	Reference:	Attribute	MOREQ2 code: /

/<entity_type>/Custom/properties/property

	Required:	YES	Number:	Multi
Definition:	Entity attribute together with values			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:	<p>The "property" label represents the entity attribute together with values. Every »property« label can have the following XML attributes:</p> <ul style="list-style-type: none"> • "name", which contains the name of the attribute. • "type", which contains the type of the attribute in the database. • "value_type", which represents the type of the attribute with possible values: STRING, STRINGMAX, BINARY. • "hash_algorithm": contains the name of the hash function that is used for calculating hash value for STRINGMAX or BINARY type attributes and at least one »value« label, which contains either the value of the entity's attribute for STRING type attributes or the name of a separate file for STRINGMAX or BINARY type attributes. 			
XMLSchema type:	complexType	Reference:	Attribute	MOREQ2 code: /

/<entity_type>/Custom/properties/property/value

	Required:	YES	Number:	Multi
Definition:	Value of the entity's attribute			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:	<p>The »value« label does not contain XML attributes if the attribute type is STRING (see the »property« label). In this case, the value written in the label is the same as the value of the attribute.</p> <p>If the value of the attribute type is the same as STRINGMAX or BINARY, the value written in the »value« label is the same as the name of the separate file that contains the value of the attribute. In this case, the »value« label contains the XML »hash« attribute that represents the hash value of the file with the attribute content.</p> <p>For BINARY attributes the »value« label also contains the XML »mime« attribute, which contains data on the content type.</p>			
XMLSchema type:	String	Reference:	Attribute	MOREQ2 code: /

/<entity_type>/Custom/retention

	Required:	NO	Number:	1
Definition:	Entity retention policy list			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:	<p>The »retention« label contains data on the entity retention policy list that is not a part of the Moreq2 specification. Individual entries in the retention policy list are found in the contained »policy« labels.</p>			
XMLSchema type:	complexType	Reference:	ACL	MOREQ2 code: /

/<entity_type>/Custom/retention/policy

	Required:	YES	Number:	Multi
Definition:	Entity's retention policy			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:	The »policy« value represents the entity's retention policy. The value of the label is the same as the identifier of the retention policy. Besides the value, the label has an XML »filter« attribute that represents the retention policy's filter type with the following possible values: CLASS, FOLDER or DOCUMENT and their combinations.			
XMLSchema type:	String	Reference:	ACL	MOREQ2 code: /

/<entity_type>/Custom/template_id

	Required:	YES	Number:	1
Definition:	Unique template ID			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:	Unique template identifier on the IMiS®/ARChive Server.			
XMLSchema type:	String	Reference:	Templates	MOREQ2 code: /

/<entity_type>/Custom/transferred_audit_log

	Required:	NO	Number:	1
Definition:	Previously imported audit log			
Use:	Class: YES	Folder: YES	Sub-File: YES	Record: YES
Commentary:	Content of the attribute sys:trf:AuditLog. The attribute is created only upon import to the IMiS®/ARChive Server.			
XMLSchema type:	String	Reference:	sys:trf:AuditLog	MOREQ2 code: /

/RDS/Description/abstract/description

	Required:	NO	Number:	1
Definition:	Longer description of the retention policy or disposition hold.			
Commentary:				
XMLScheme type:	String	Reference:	sys:ret:pol:DetailedDescription	MOREQ2 code: M043

/RDS/Description/mandate

	Required:	NO	Number:	Multiple
Definition:	Authorizations, which set the rights of the retention policy.			
Commentary:	Name of the file in the file system which stores the authorization in electronic form. Only the retention policy has authorizations.			
XMLScheme type:	String	Reference:	sys:Content	MOREQ2 code: M030

/RDS/Description/abstract/reason

	Required:	NO	Number:	1
Definition:	Reason for creating a retention policy or disposition hold.			
Commentary:				
XMLScheme type:	String	Reference:	sys:ret:hold:Reasonsys:ret:pol:Reason	MOREQ2 code: M015

/RDS/Description/title

	Required:	YES	Number:	1
Definition:	Title of the retention policy or disposition hold.			
Commentary:				
XMLScheme type:	String	Reference:	sys:Title	MOREQ2 code: M015

/RDS/Event_plan/event_type/disposition_action

	Required:	YES	Number:	1
Definition:	Default action of the retention policy in the implementation phase of the review process.			
Commentary:	Valid values: <ul style="list-style-type: none"> • Dispose: the default action of the retention policy is the disposition of entities. • Permanent: the default action of the retention policy is the permanent retention of entities. • Transfer: the default action of the retention policy is the transfer of entities to another system and their disposition after confirmation of successful transfer. • Review: the default action of the retention policy is to leave the entity for the next review process. 			
XMLScheme type:	String	Reference:	sys:ret:pol:Action	MOREQ2 code: M014

/RDS/Identity/system_identifier/disposal_hold

	Required:	YES	Number:	1
Definition:	Unique system identifier of the disposition hold.			
Commentary:	Set by IMiS®/ARChive Server.			
XMLScheme type:	String	Reference:	Internal entity identifier	MOREQ2 code: M137

/RDS/Identity/system_identifier/retention_and_disposition_schedule

	Required:	YES	Number:	1
Definition:	Unique system identifier of the retention policy.			
Commentary:	Set by IMiS®/ARChive Server.			
XMLScheme type:	String	Reference:	Internal entity identifier	MOREQ2 code: M008

/RDS/Use/status/inheritance

	Required:	NO	Number:	1
Definition:	Specifies whether the retention policy can be inherited by entities.			
Commentary:	The IMiS®/ARChive Server specifies that all retention policies are inherited. The value is always TRUE.			
XMLScheme type:	String	Reference:	Internal entity identifier	MOREQ2 code: M197

Table 5: Lists of XML tags

3.2.3 Format of the additional metadata export file

The additional (user entered) metadata export file is used for the particular requirements of the archiving process. Upon export, each entity may optionally be added additional metadata which is not part of the archived entity's own metadata.

The additional metadata is prepared by the archivist, using a premade XML file.

This metadata is not within the framework of the client or server's business logic.

The format of the file is prescribed with the following XSD scheme:

```
<?xml version="1.0" encoding="UTF-8"?>
<xs:schema targetNamespace="http://www.dlm-network.org/moreq2/1.04.01"
xmlns:xs="http://www.w3.org/2001/XMLSchema"
xmlns:moreq2="http://www.dlm-network.org/moreq2/1.04.01"
elementFormDefault="unqualified"attributeFormDefault="unqualified" version="1.04.01">
  <xs:element name="AdditionalMetadataRoot">
    <xs:complexType>
      <xs:sequence>
        <xs:element name="Entity" minOccurs="0" maxOccurs="unbounded">
          <xs:complexType>
            <xs:sequence>
              <xs:any processContents="skip" maxOccurs="unbounded"/>
            </xs:sequence>
            <xs:attribute name="classification_code" type="xs:string"/>
          </xs:complexType>
        </xs:element>
      </xs:sequence>
    </xs:complexType>
  </xs:element>
</xs:schema>
```

Image 3: Example XSD scheme

For each entity to be added user metadata during export, the archivist enters, in an XML file under the root node with the name »AdditionalMetadataRoot« (prescribed by the Moreq2 scheme), an »Entity« node with the attribute of the entity's classification code. During export, the content of this node is copied into the export XML file of the entity.

```
<moreq2:AdditionalMetadataRoot xmlns:moreq2="http://www.dlm-network.org/moreq2/1.04.01">
  <Entity classification_code="03.01">
    <!-- add custom XML node entries -->
    <A>Metadata A</A>
  </Entity>
  <Entity classification_code="03.01/00001">
    ...
  </Entity>
</moreq2:AdditionalMetadataRoot>
```

Image 4: Example additional metadata export file

3.3 Format of the confirmation file during transfer

The format of the confirmation file is a text file containing comma separated values; abbreviation: CSV.

Each record contains the following values:

- Classification code of the transferred entity.
- Confirmation value («true» – if the entity has been successfully transferred to a third archive system).
- Reference to the transferred entity in the third archive system.

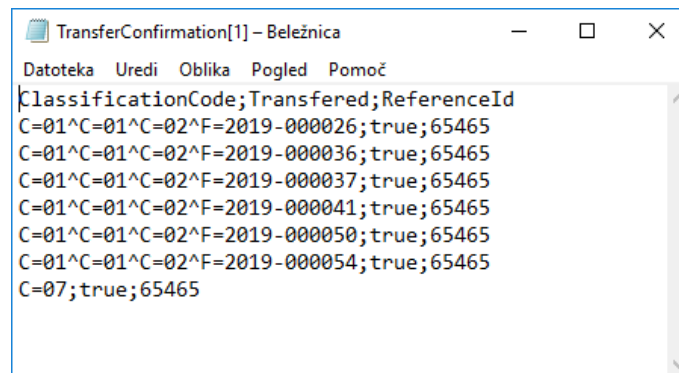
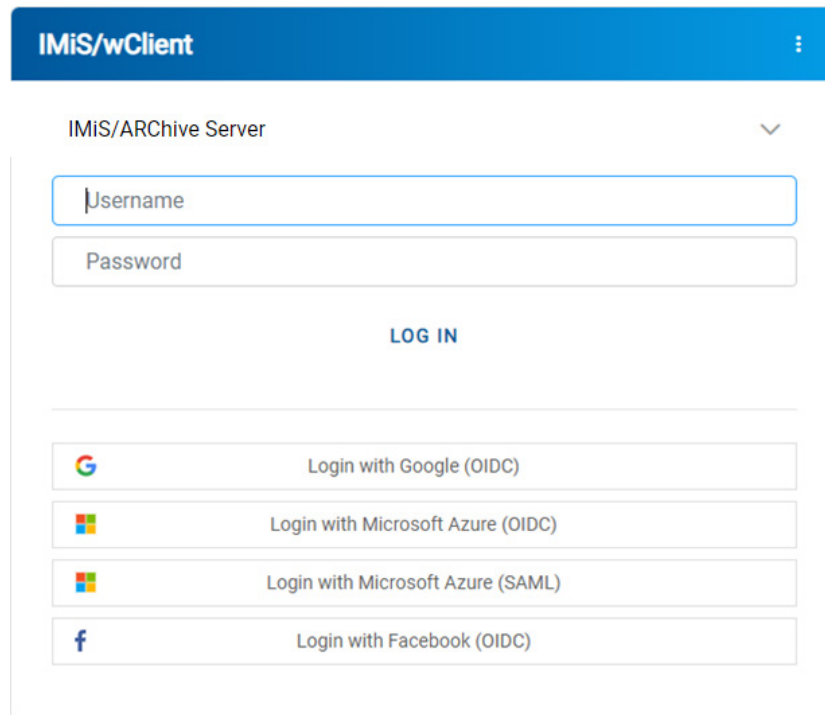


Image 5: Example of a confirmation file after transfer

4 USER MANUAL

4.1 Login and Logout

The user accesses the IMiS®/wClient application via a web browser (Google Chrome, Mozilla Firefox, MS Edge, ...) by entering the URL of IMiS®/wClient in the title bar. A login window appears in which the user can log into the IMiS®/ARChive Server.



The screenshot shows a web browser window titled "IMiS/wClient". Below the title bar, there is a dropdown menu showing "IMIS/ARChive Server". The main content area contains two input fields: "Username" and "Password". Below these fields is a "LOG IN" button. At the bottom, there are four social login options: "Login with Google (OIDC)", "Login with Microsoft Azure (OIDC)", "Login with Microsoft Azure (SAML)", and "Login with Facebook (OIDC)".

Image 6: Login on archive

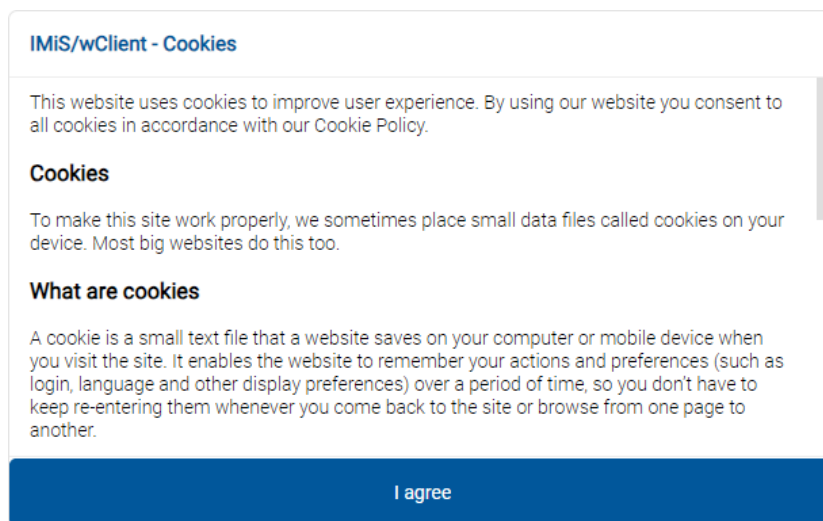
4.1.1 Cookie Policy

Before first login on the archive and every subsequent login (if cookies have been removed) the user has to agree to the use of cookies.

To ensure proper operation and a better user experience the website uses the following cookies:

- To remember last selected archive
- Current archive user identifier
- Archive token
- Entity handles
- Entity information visibility

- Current locale
- List mode
- Policy agreed
- Classification code visibility
- Description visibility
- Sort field
- Sort field descending.




IMiS/wClient (v1.9.2310.10)



Image 7: Cookie Policy

4.1.2 Localization

In the top right corner of the login window the user can choose the language of the IMiS®/wClient application from a list by clicking on the icon .

In agreement with the application developer MARGIS, Inc., the language selection can be expanded as desired.

The languages currently supported are:

- English
- Slovene.

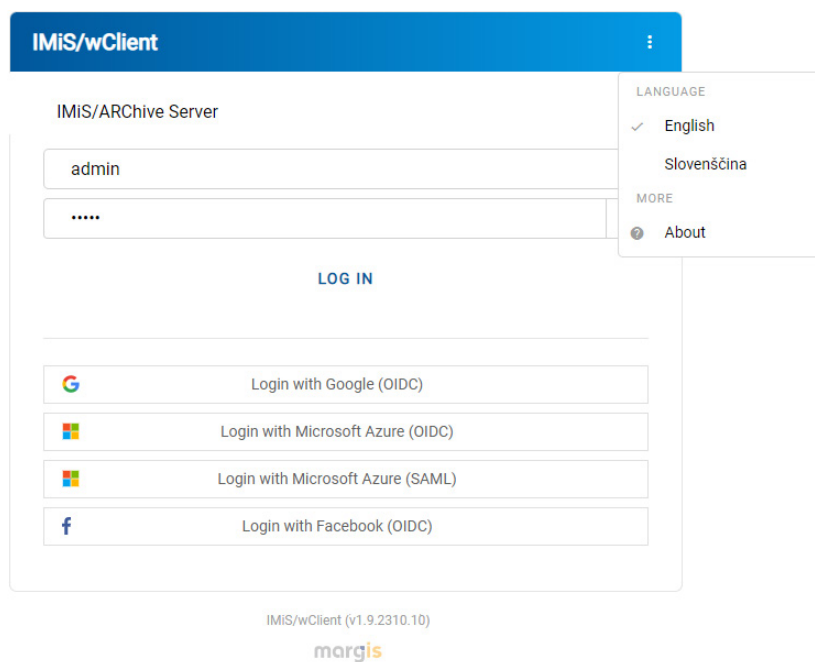


Image 8: Language selection

4.1.3 About

By selecting the »About« command, the user is shown a new window with the following information:

- IMiS® module name.
- IMiS® module version.
- Archive name and version.
- IMiS®/Storage Connector Services REST version.
- License Agreement.
- Notices and Trademarks.

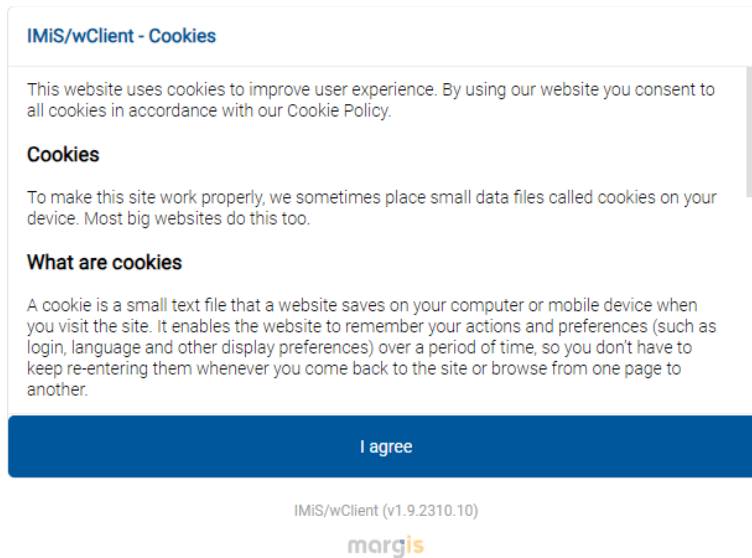


Image 9: About dialog box

4.1.4 Login

The user logs into the archive of the IMiS®/ARChive Server via the IMiS®/wClient by first selecting the relevant archive in the login window.

For faster searching, the user can use a search engine.

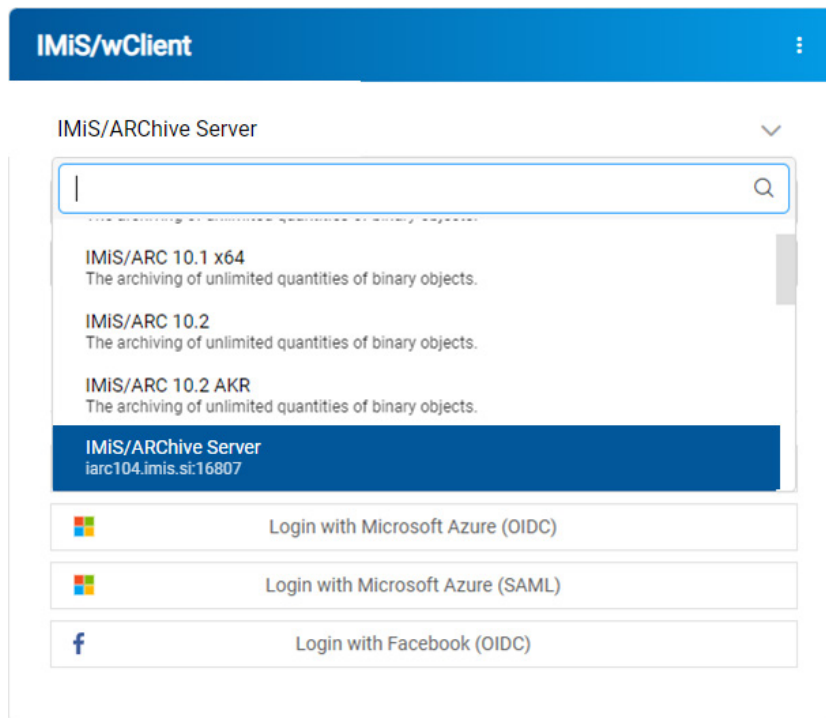


Image 10: A list of available archives

Note:

The user can choose only among the archives predefined by the administrator. The user selects the archive from a list by clicking on the arrow in the top right area of the login window. The administrator is the only one who can remove an archive.

The username that the administrator enters in the field "Username" is case insensitive. For faster selection in the case of a prior login, the username is shown below the field for entering the username.

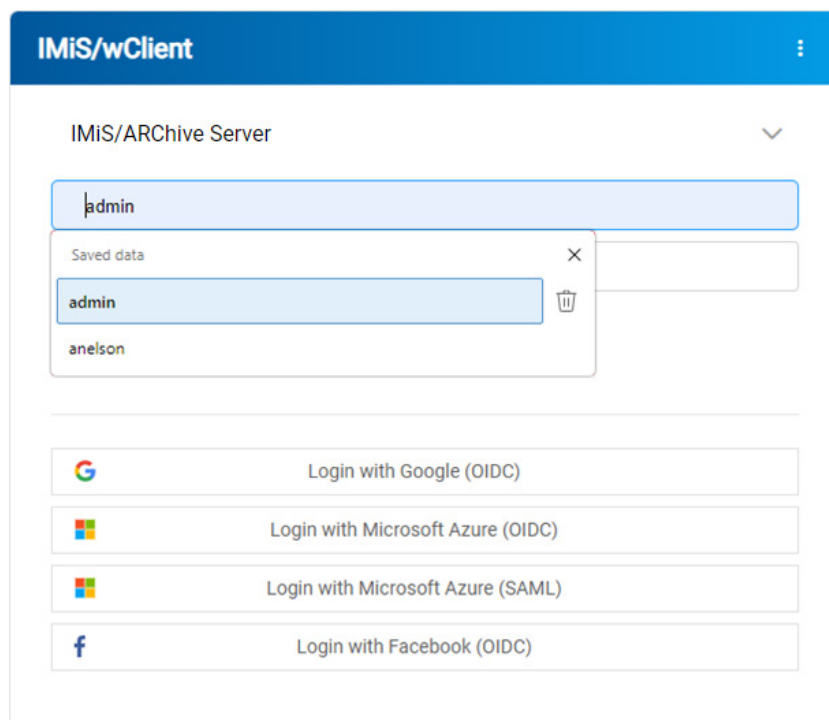



Image 11: Logging into the archive

After entering at least one character of the password, the logged-on user is shown the icon



. By selecting the icon, the user is shown the password characters.

The icon  next to the input field for entering the password enables displaying the password only when the display button is active (Mousedown). The password that the user enters in the "Password" field is case-sensitive. The user confirms login with the »Log in« button.

The user can log into multiple archive servers in multiple browser tabs.

When displaying the login page after the user has logged out, the user session remains open.

If the browser is refreshed, the user stays logged into the last archive server.

If the archive identifier does not match the URL after the browser has been refreshed, the login page is shown.

If two users are logged in to two different browser tabs, then, if the session is valid and the page is refreshed, the address in the second tab changes to the address that appeared in the first tab after login. At the same time, the logged-on user in the second tab changes to the user of the first tab.

After a successful login, the central view shows the user a list of root classes in the classification scheme of the selected archive to which the user has access rights.

4.1.5 Logout

The user logs out of the archive using the »Log out« command in the popup menu.

Access to the popup menu is enabled by clicking the arrow next to the user's name in the top right corner of the user interface.

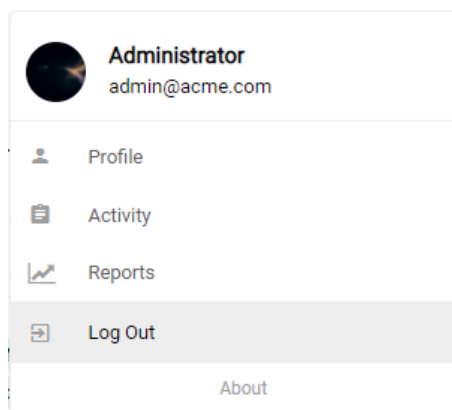


Image 12: Log out of the archive

4.2 Interface description

The user interface of the IMiS®/wClient is designed in accordance with contemporary design trends. Therefore, managing the archives and entities of the electronic archive is similar to managing regular folders and files, which makes use simple and familiar.

The user interface consists of six (6) main windows described below.

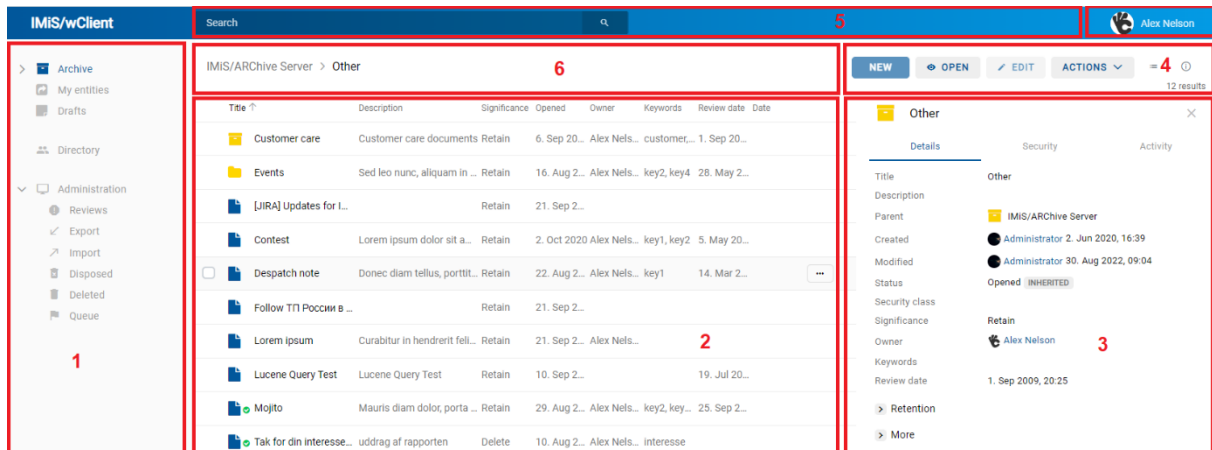


Image 13: User interface of the IMiS®/wClient

Folders

The left view of the user interface (number 1 in the image above) contains the following categories:

- Archive
- My entities
- Drafts
- Directory
- Administration.

For more information see chapter [Classification scheme](#).

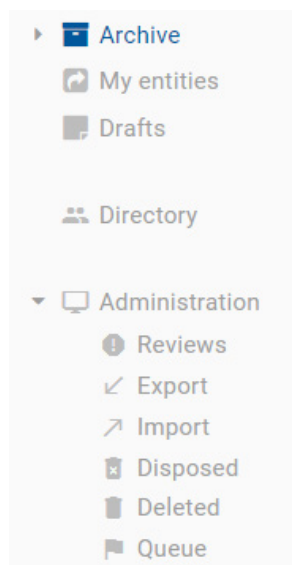


Image 14: Categories in the left view

The central view

In the central view of the user interface (number 2 in the image above) is a list of contained directory entities or the selected archive/entity. At the first level, the user can only create classes under the archive's root. The settings of the IMiS®/wAdmin administration web interface allow mixed entity types (classes, folders or documents) at the remaining levels. The mixing of entity types is enabled at the same level under the same parent entity.

Note: The user with permission can enable mixed entity types by checking Allow Mixed Entity Types in the section Administration in the basic view in the folder Home of the IMiS®/wAdmin administration web interface. Mixed entity types are not allowed at the first level of the classification scheme (root entities).

IMiS/ARChive Server > Other

Title ↑	Creator	Opened	Owner	Significance
Customer care	Alex Nelson (anelson)	6. Sep 2021	Alex Nelson (anelson)	Retain
Events	Administrator (admin)	16. Aug 2021	Alex Nelson (anelson)	Retain
Celebration	Administrator (admin)	19. Feb 2020	Alex Nelson (anelson)	Retain
Contest	Administrator (admin)	2. Oct 2020	Alex Nelson (anelson)	
Despatch note	Zoran Loncar (zoran)	2. Dec 2020	Alex Nelson (anelson)	Permanent

Image 15: A list of mixed entity types

The contained entities are shown below the bar with the titles of the common attributes.

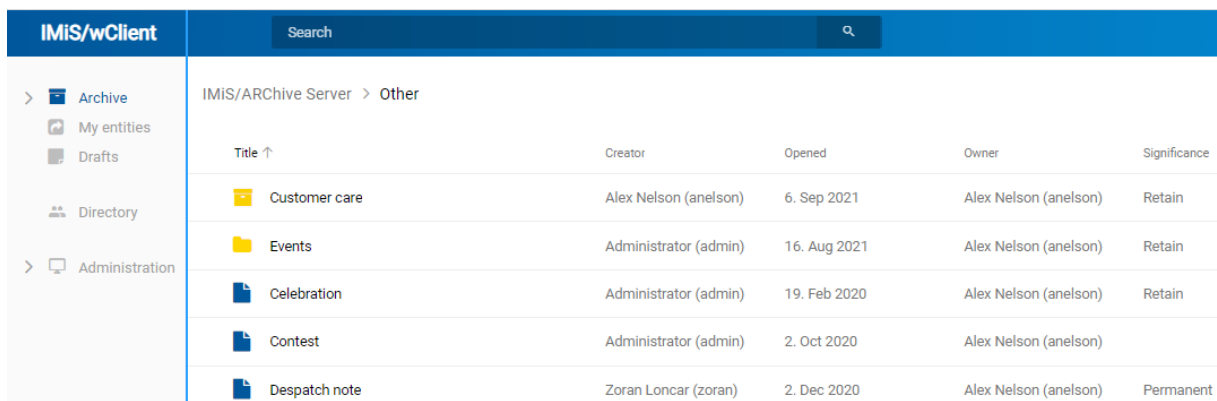
The »Title« is shown by default. More on the central view in the chapter [List of entities](#).

***Note:** When displaying a greater number of entities, loading all the entities simultaneously would greatly slow down the web client. That is why the user can load (directory) entities by pages.*

After showing the first 50 entities, the slider stops halfway; by moving the slider all the way down, 50 new (directory) entities are added.

The user can set the spacing between the left and central view by moving the dividing line.

This setting applies while the user is logged into the archive.



IMiS/wClient		Search			
<ul style="list-style-type: none"> > Archive My entities Drafts Directory > Administration 		IMIS/ARChive Server > Other			
Title ↑	Creator	Opened	Owner	Significance	
Customer care	Alex Nelson (anelson)	6. Sep 2021	Alex Nelson (anelson)	Retain	
Events	Administrator (admin)	16. Aug 2021	Alex Nelson (anelson)	Retain	
Celebration	Administrator (admin)	19. Feb 2020	Alex Nelson (anelson)	Retain	
Contest	Administrator (admin)	2. Oct 2020	Alex Nelson (anelson)		
Despatch note	Zoran Loncar (zoran)	2. Dec 2020	Alex Nelson (anelson)	Permanent	

Image 16: Movable dividing line between the left and central view

The right view

The right view of the user interface (number 3 in the image above) contains tabs which show different types of information on the selected entity. When viewing publicly accessible entity data, the user is generally provided public metadata on the entity in the Details tab and shown the user's effective rights on the entity in the Security tab.

Users with rights have access to the selected the audit log for the selected entity in the Activity tab and display of the selected retention periods and disposition holds in the Retention tab in Edit mode. If the user does not have the appropriate rights, the tabs are not shown.

For more information see the chapter [Entity information](#) and [Entity access](#).

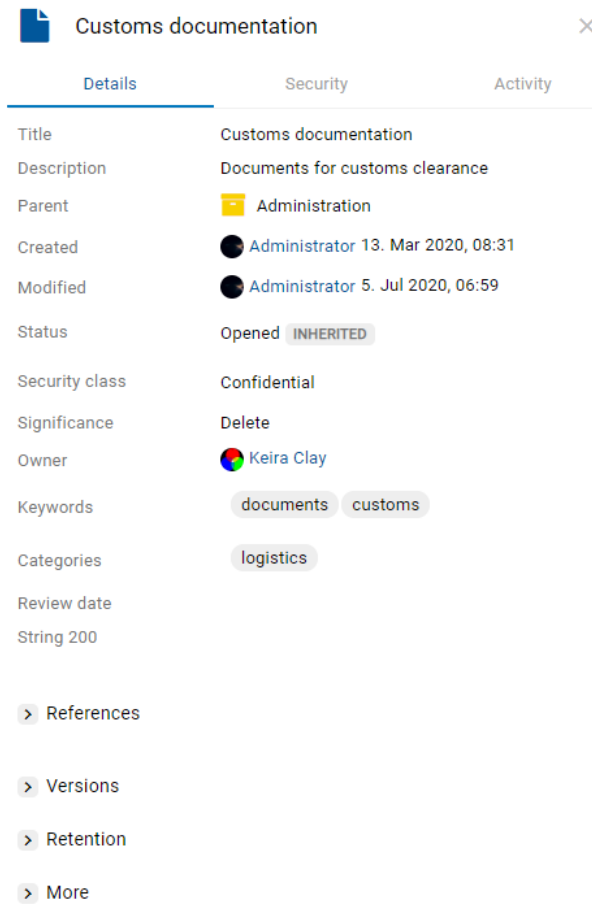


Image 17: Entity information

Note:

The default setting of the IMiS®/wClient is to always show information on the entity and content.

The command bar

The command bar (number 4 in the image above) contains commands and actions. They depend on the type and status of the element selected in the classification scheme or of the entity selected from the list of entities, and on the user's rights and role.

For more information see the chapter [Command bar](#).



Image 18: Display of the command bar


Note:

If the Archive folder is selected, only the button for creating root classes (New) is enabled in the command bar.

The header of the user interface

The header of the user interface (number 5 in the image above) contains:

- Information on the title of the application (IMiS®/wClient).
- A field for entering the search string with the option of selecting the search scope.
For more information see chapter [Search](#).

- A list of help links (the icon  left of the username).
- Information on the user's profile and the program module.
For more information see chapter [Menu functions](#).

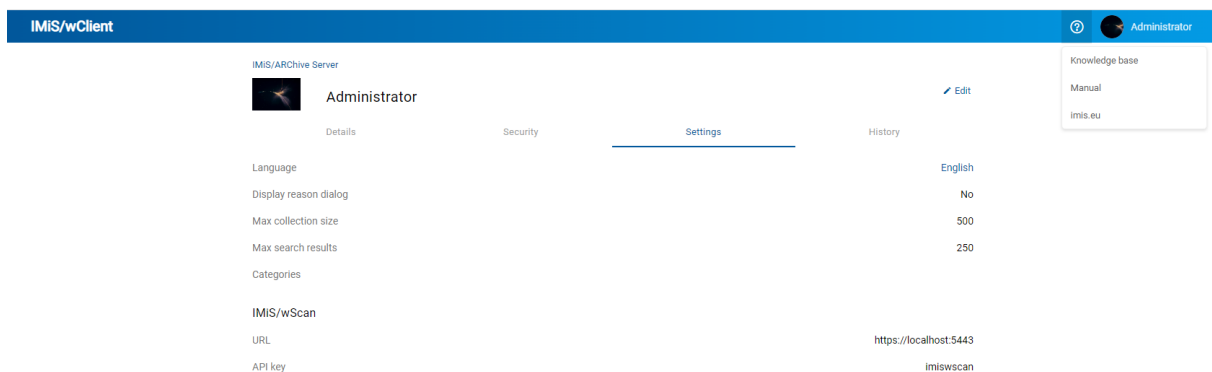


Image 19: A help link in the user interface header

The user interface can be customized with additional settings for each archive which the user can set in the file [settings.json](#).

The default name "IMiS®/wClient" and theme color can be replaced e.g., with the company's logotype and color.

Below is a list of theme parameters:

themes[]	Description
Logo	The logotype shown in the top bar.
primary_color	The primary theme color.
primary_color_gradient	The primary gradient color which is used in the top bar as the background color.
primary_color_variant	The primary dark color.
primary_color_text	The primary text color.
focus_color	The focus color which appears as a border around the buttons when clicked and as a border around the text entry box.
Archives	The collection of archives in which the theme is used. If this element does not exist or is empty, the theme is global.
class_icon_color	The color of the icon of class-type entities.
folder_icon_color	The color of the icon of folder-type entities.
document_icon_color	The color of the icon of document-type entities.
directory_entity_icon_color	The color of the icon of directory entities.
secondary_color	The secondary theme color.
secondary_color_variant	The secondary dark color.
secondary_color_text	The secondary text color.
link_color	The color of link text. The default value is primary_color.

Table 6: Theme settings in the file settings.json

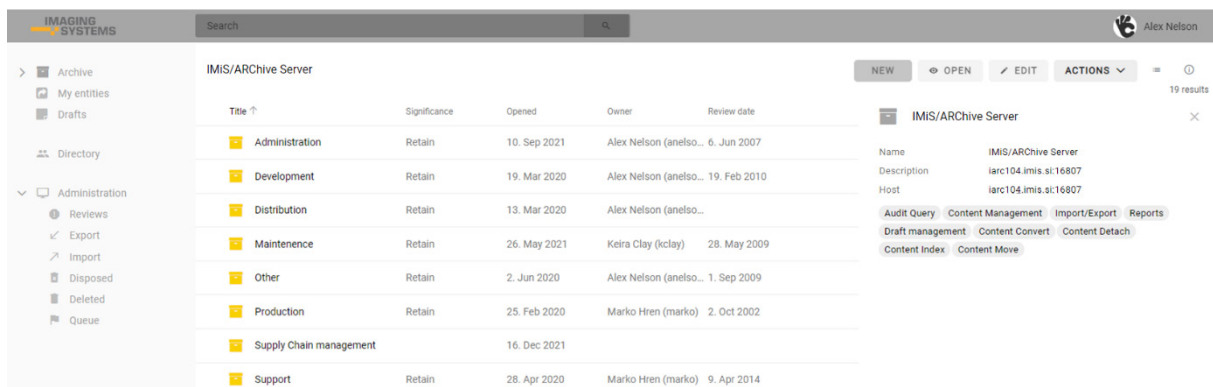


Image 20: Example of changing the theme settings in the file settings.json

The hierarchical view

To enable quicker access to parent entities, the user is provided a hierarchical view of the entity's position within the tree structure (number 6 in the image above) above the central view of the user interface. By selecting the title of the parent entity, the user is shown a list of child entities in the central view.

IMIS/Archive Server > Custom Relationship Man... > Invoicing and Crediting > Invoices > Takok 2018

Image 21: Hierarchical position of the entity within the tree structure

The user has the option of narrowing the user interface display by dragging the right edge to the left.

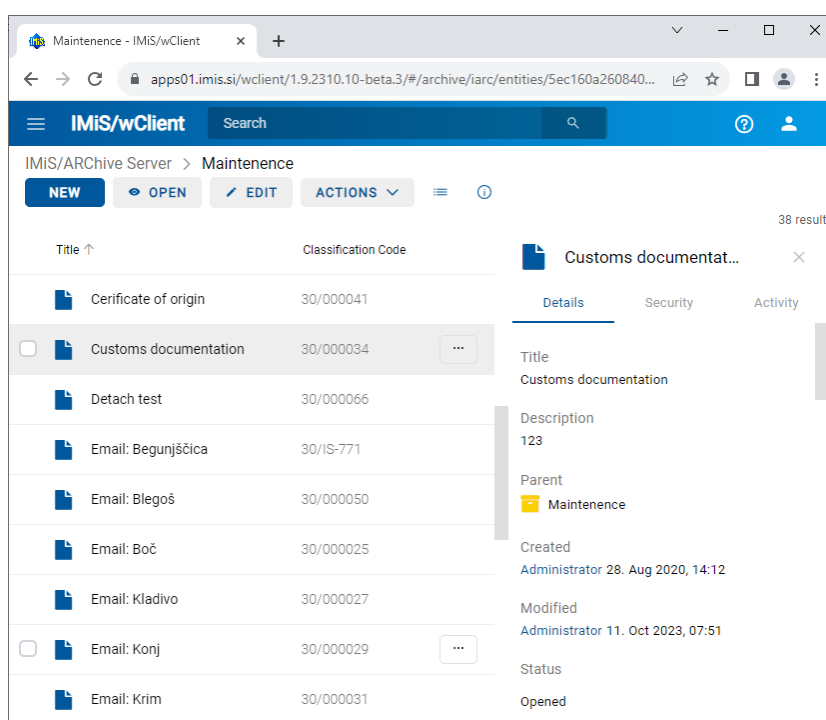



Image 22: Narrowing the user interface display

By narrowing the user interface display, the left view with the classification scheme, list of directory entities and administration folders is moved to the menu. The user accesses the menu via the icon .

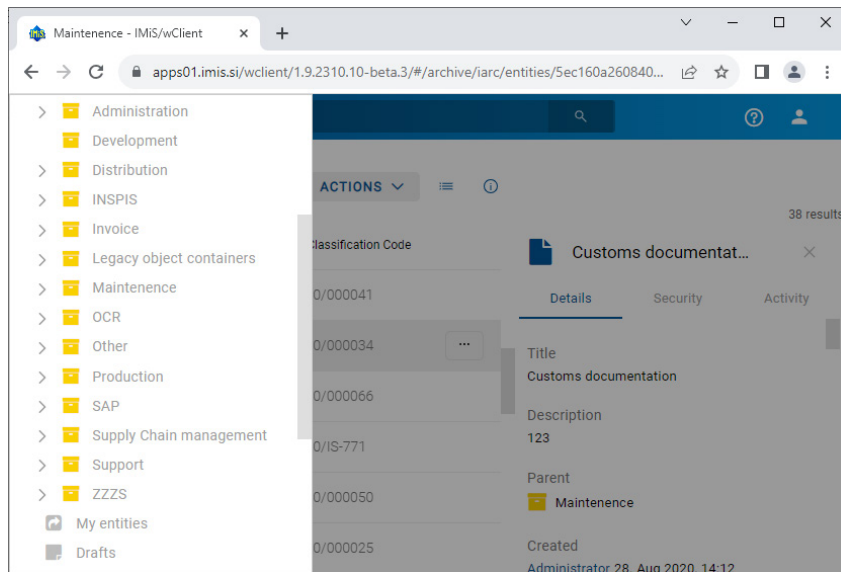


Image 23: Access to folders in the left view via the menu

4.2.1 Classification scheme

In the left view of the IMiS®/wClient, the user is shown the following categories:

- Archive: root classes in the classification scheme.
- My entities: a list of entities accessed by the user.
- Drafts: drafts of document versions.
- Directory: a list of archive users.
- Administration: a system folder with subfolders.

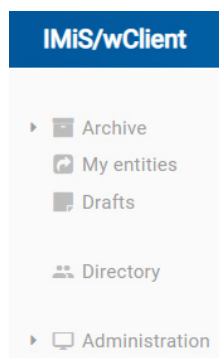


Image 24: Display of folders in the left view of the web client IMiS®/wClient

4.2.1.1 The Archive folder

By selecting the Archive folder in the left view, the user is shown a list of archive root classes. By clicking on the arrow in front of the selected class, the user is shown a list of contained classes.

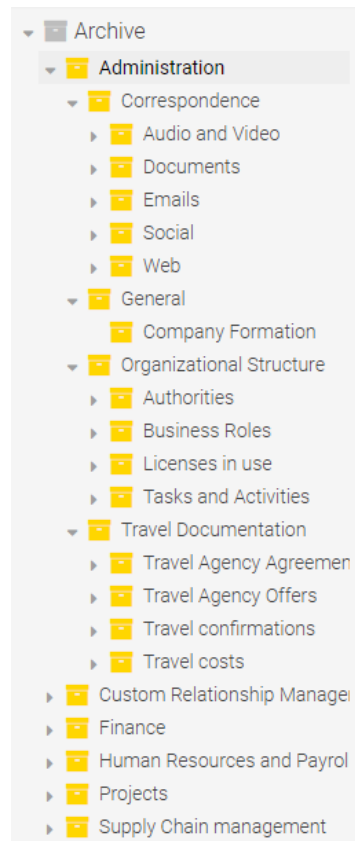


Image 25: The tree view of the classification scheme in the Archive folder

By right-clicking over the selected entity, the user opens a popup menu and performs the following actions:

- **New:** creates a new entity under the selected entity.
- **Open:** opens the selected entity in reading mode.
- **Edit:** opens the selected entity in editing mode.
- **Share:** copies the link to the selected entity and shares it with other users.
- **Delete:** deletes the selected entity.

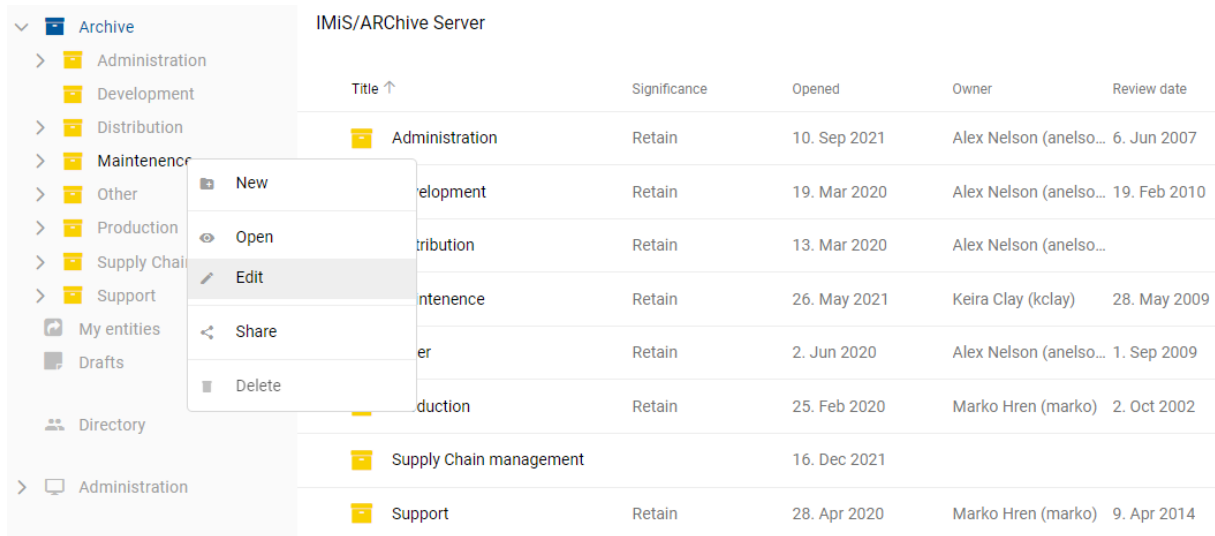


Image 26: Popup menu in the tree view

Note:

By clicking on the arrow in front of the selected class, the user is shown a list of contained classes. By configuring the server, the user can limit the number of levels for classes and folders in the classification scheme. The default setting specifies a hierarchy with a maximum of three (3) class levels.

The IMiS®/ARChive Server does not limit the number of the archive's root classes nor the number of contained classes, folders or documents in an individual class or folder.

4.2.1.2 The My entities folder

By selecting the Directory folder in the left view, the user is shown a list of entities, whose owner is the current user, in the central view.

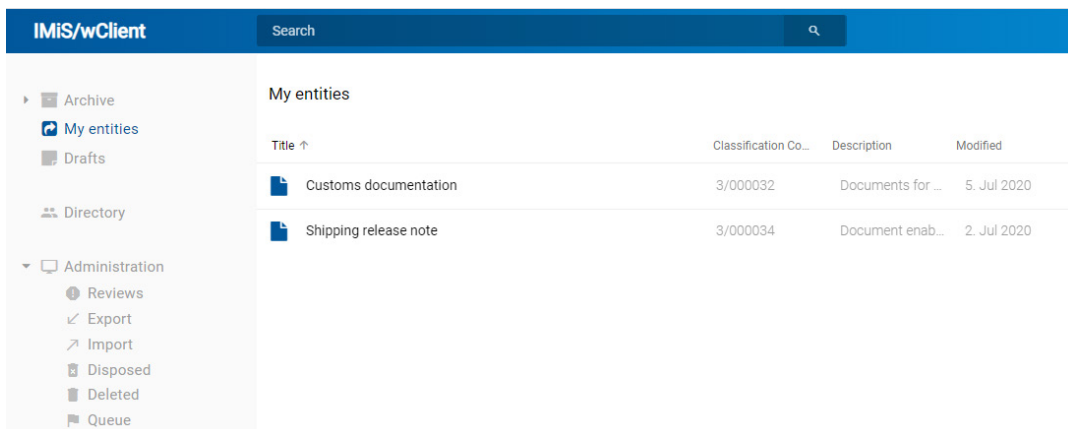


Image 27: Selecting the entity in the My entities folder in the central view

4.2.1.3 The Drafts folder

By selecting the Drafts folder in the left view, the user is shown a list of entity version drafts, to which the current user has access, in the central view.

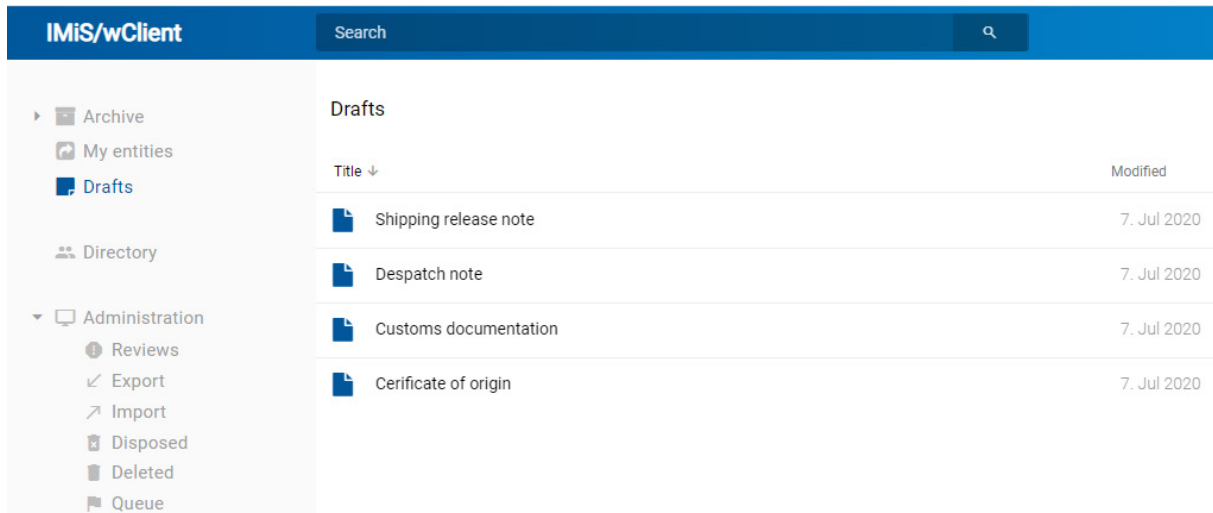


Image 28: Selecting the Drafts folder in the left view

4.2.1.4 The Directory folder

By selecting the Directory folder in the left view, the user is shown a list of directory entities (users or groups) in the central view.

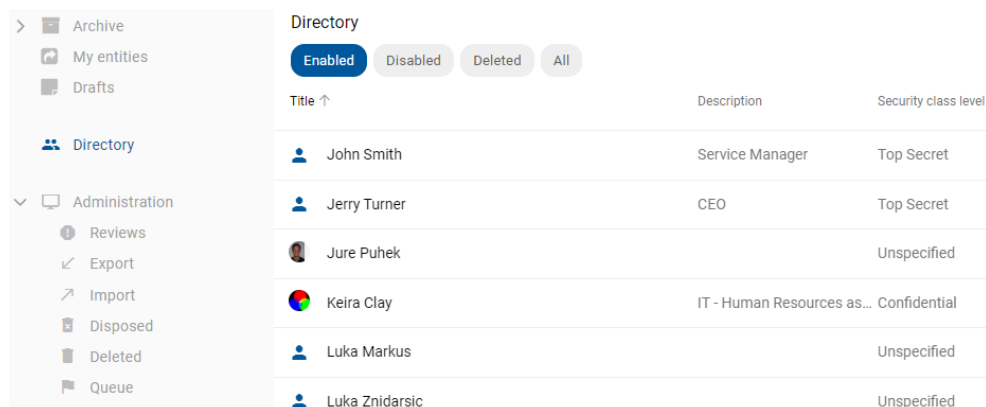


Image 29: The Directory folder in the left view

Directory entities are sorted in the following groups:

- Enabled
- Disabled
- Deleted
- All.

In the event of a greater number of directory entities, the user can search by the text entered in the search box (title, first name, last name, email, description) and select the directory entity in the popup menu below the text.

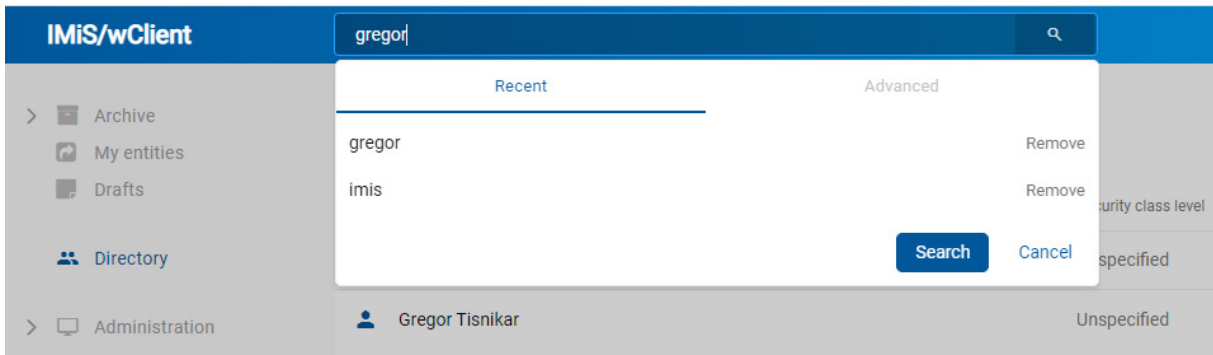


Image 30: Searching by directory entities

The search results are shown on pages with the option of being edited by title in ascending or descending order.

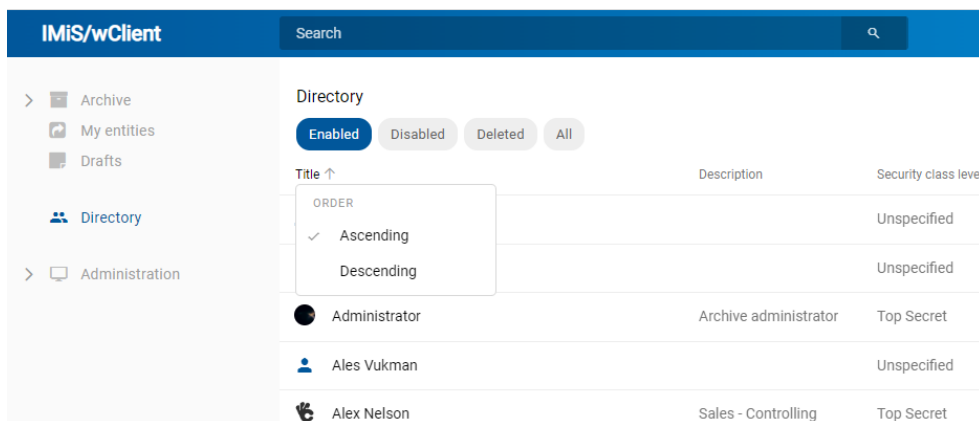


Image 31: Results of searching by directory entities

The right view provides the directory entity information.

The screenshot shows the 'Directory' view with filters for 'Enabled', 'Disabled', 'Deleted', and 'All'. A table lists directory entities:

Title ↑	Description	Security class level
MobileIron LDAP Connector		Unspecified
Ron Salazar	Sales - IT support	Restricted

The right pane displays details for 'Ron Salazar':

- Description:** Sales - IT support
- Type:** User
- First name:** Ron
- Last name:** Salazar
- Email:** ron.salazar@acme.com
- Security class level:** Restricted
- Created:** System Administrator 1. Jan 0001, 01:22
- Modified:** Administrator 12. Aug 2022, 13:12
- Aliases:**
- Member of groups:** Everyone, Users, IT, Sales
- Identifier:** rsalazar

Image 32: User data

4.2.1.5 The Administration folder

The folder Administration is available to the user in the left view with a default display of subfolders:

- **Reviews:** a list of reviews in the review process.
For more information see chapter [Review process](#).
- **Export:** a list of entity exports containing reports.
For more information see chapter [Export](#).
- **Import:** a list of entity imports containing reports.
For more information see the chapter [Import](#).
- **Trash:** a list of deleted entities. This folder contains the following subfolders:
 - **Disposed:** a list of entities disposed of during the review process.
 - **Deleted:** a list of deleted entities.
 - **Queue:** a list of entities waiting for deletion.

4.2.2 List of entities

A list of contained entities (classes, folders or documents) of the selected class is located in the central view of the user interface. The contained entities are shown below the bar with the titles of the common attributes.

IMIS/Archive Server > Supply Chain management

Title ▲	Classification Code	Description	Modified
[-] Maintenance	03.06		13/9/2018
[-] Manufacturing	03.04		22/8/2018
[-] Planning and Control	03.01		22/8/2018
[-] Procurement	03.03		22/8/2018
[-] Production	03.07	Production docu...	27/9/2018
[-] Quality Management	03.05		22/8/2018
[-] Work Organization	03.02		22/8/2018

Image 33: A list of contained entities of the selected entity

By selecting the arrow next to the title of the common attributes column, the logged-on user is shown the entities in descending or ascending order. Similarly, by selecting the title a menu appears with the options “Ascending” and “Descending”. The entities on the list are sorted first by entity type and then by title.

IMIS/ARCHive Server > Other

Title ↓	Significance	Opened	Owner
ORDER			
Ascending	【武汉大学...	8. Sep 2021	
✓ Descending	kan du he...	10. Aug 2022	Alex Nelson (anelson)
[-] Mojito	Retain	29. Aug 2022	Alex Nelson (anelson)
[-] Lucene Query Test	Retain	10. Sep 2021	
[-] Despatch note	Retain	22. Aug 2022	Alex Nelson (anelson)
[-] Contest	Retain	2. Oct 2020	Alex Nelson (anelson)
[-] Events	Retain	16. Aug 2021	Alex Nelson (anelson)
[-] Customer care	Retain	6. Sep 2021	Alex Nelson (anelson)

Image 34: Sorting by entity type

Sorting in ascending or descending order is also possible for “Classification code” and “Modified”.

Note: The user can select entities from the list using arrow keys on the keyboard (up/left, down/right).

If the contained entity contains a greater number of entities than specified in the settings, the user is shown the notification Entity collection contains XXX entities and is too large to be displayed automatically.

For more information on setting the number of entities shown on the list see chapter [Installation settings](#).

IMIS/ARChive Server > Development

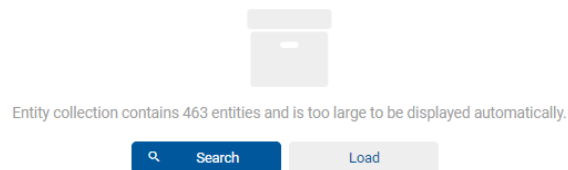


Image 35: Limiting the display of a greater number of entities on the list

The user has two options:

- The user can limit the set of entities displayed on the list with a search (the recommended choice).
- The user loads the entities and displays them on the list.

If the user selects the action Search, a dialog box appears for entering the search string.

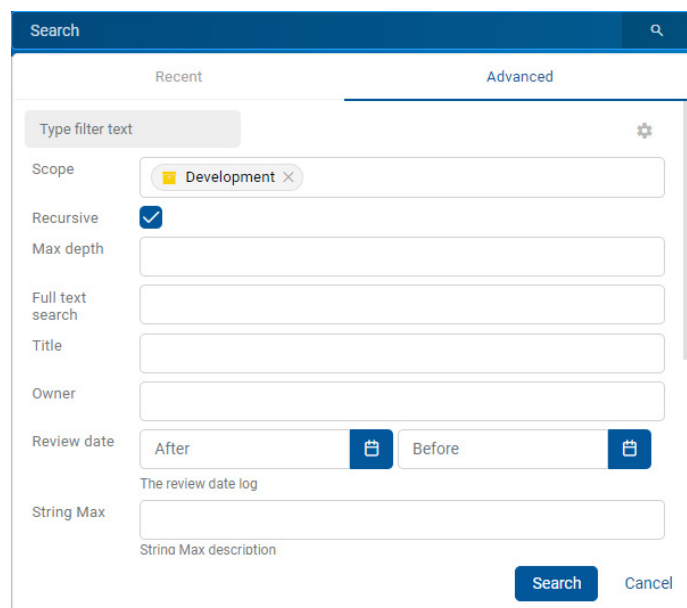


Image 36: Limiting the set of entities displayed on the list with a search

For more information on limiting the set of attributes for a search, see chapter [Full text search](#).

If the user selects the action Load, the entities are loaded and displayed on the list.

The user adds or remove the columns of the selected attribute. Changes are saved to the user profile and applied at the next login too. The “Title” column is always present and cannot be removed.

For more information on the entity display options see chapter [Menu functions](#).

By selecting the arrow or title of the column of the selected attribute Title, Classification code or Modified, the user specifies the order of the entities shown.

IMiS/ARChive Server > Other










Title	Classification Code ↑	Opened
 複写資料が到着しました【武蔵大学図書館】	ORDER	ep 2021
 Lucene Query Test	Ascending	Sep 2021
 Despatch note	Descending	
 Mojito	16/000021	22. Aug 2022
 Events	16/000029	29. Aug 2022
 Customer care	16-2021-000001	16. Aug 2021
 Contest	16.7	6. Sep 2021
 Contest	16/IS-563	2. Oct 2020
 Tak for din interesse - her kan du hente dit uddrag ...	16/IS-839	10. Aug 2022

Image 37: Selecting the order of displaying the list of entities

Note:

The setting of displayed attributes applies to the selected browser at the level of the entire archive for all entities shown on the list of contained entities.

Tip:

In order to preserve a clear classification scheme and limit the moving of entities, users are advised AGAINST classifying documents directly into classes but always in folders.

4.2.3 Entity information

Information about the selected entity is found in the right view of the IMiS®/wClient user interface. The tabs are available in the following modes of displaying information on the selected entity:

- Preview: a display of tabs and their contents which are publicly accessible to the user.
- Open: a display of tabs according to the user's effective permissions.
- Edit: a dialog box opens with the attributes whose values can be modified.

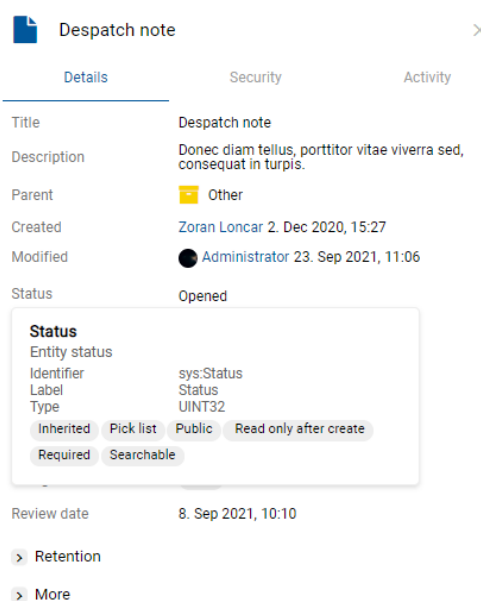


Image 38: Tabs containing entity information in the reading mode

Note: By moving the cursor over the attribute name, the tooltip shows the following attribute information: Identifier, Label, Description, Type and Options for attributes located in templates (see image above the note).

4.2.3.1 The Details tab

The Details tab contains a list of the metadata of the selected entity.

The first column gives the titles of attributes, while the second column displays their values.

4.2.3.1.1 General metadata

The Details tab contains general and general metadata for the selected entity.

By selecting the name in front of a given set, the user is shown the remaining entity details.

For more information on required and optional attributes see chapter [General system attributes](#).

Details	Security	Activity
Title	SpaceX	
Description	SpaceX project description	
Parent	Administration	
Created	Administrator 11. Mar 2020, 11:25	
Modified	Administrator 30. Apr 2020, 11:54	
Status	Opened INHERITED	
Security class	Confidential	
Significance	Retain	
Owner	Alex Nelson	
Keywords	space project	
Categories	projects	

Image 39: The Details tab in the reading mode

Note: The user profile settings save the open/closed status for: "Reference", "Versions", "Retention", "Email", "Physical properties", "Save log" and "More".

4.2.3.1.2 Custom metadata

If using a suitable template, the user with the appropriate rights can predefine the Custom metadata when creating or editing an entity.

They are available to the user in open mode in the Details tab.

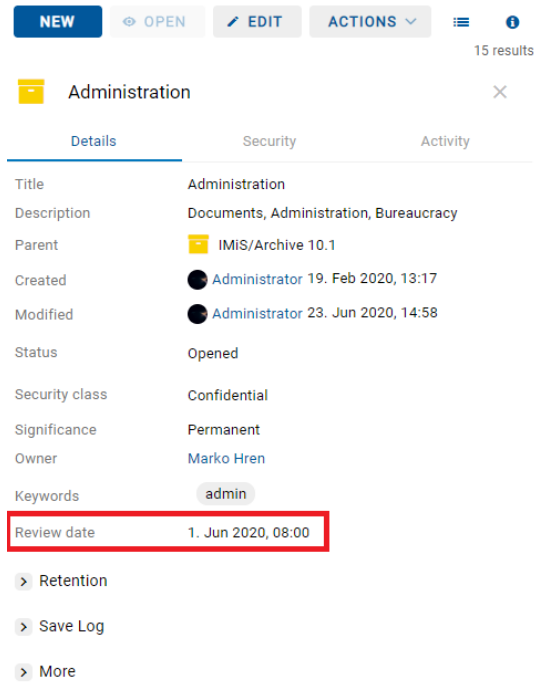


Image 40: Custom metadata in the reading mode

In edit mode the user has the option of editing Custom metadata.

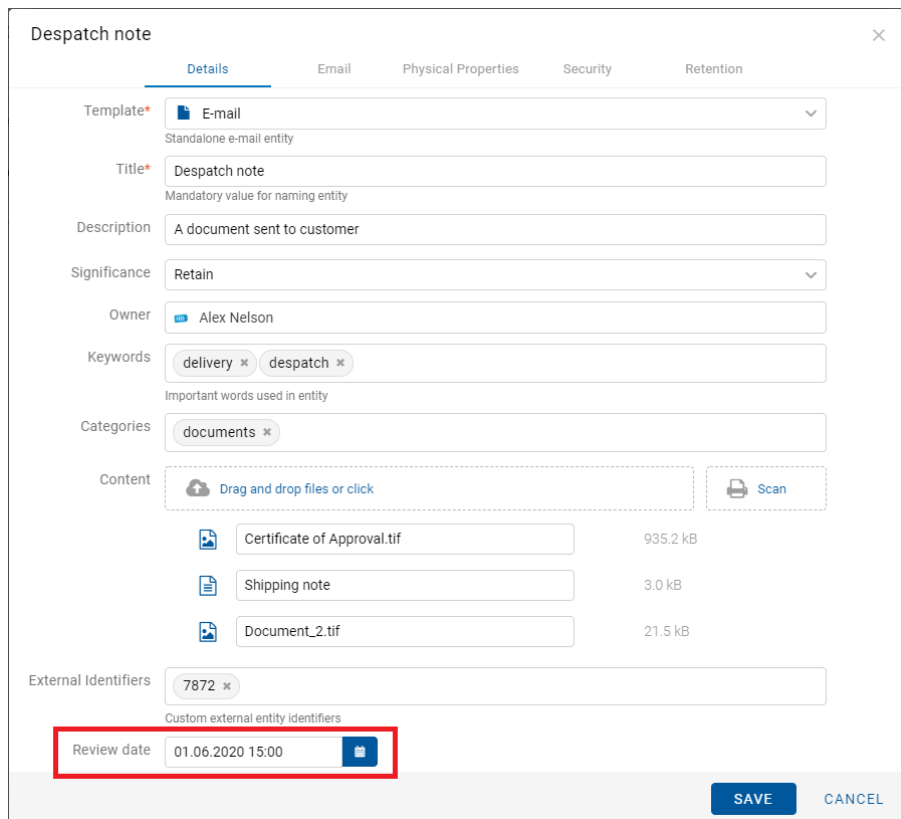


Image 41: Custom metadata in edit mode

Note: The attributes in the template, which is predefined by the user with permission, can be multi-value.

The 'Create Document' dialog box is shown with the 'DETAILS' tab selected. It contains several attribute groups:

- binary:** Three dropdown menus with values 'AXNOP.JPG', 'AIP.XML', and 'ICON_SAMPLE_1.PNG'. The first two have a '-' icon, and the third has a '+' icon.
- bool:** A checkbox with '-' and '+' icons.
- Date:** Two date pickers with values '20. September 2019' and '13. October 2019'. The first has a '-' icon, and the second has a '+' icon.
- Date time:** A date-time picker with a '+' icon.
- decimal10:** Three text input fields with values '0.99887766', '1.22334455', and '2.33445566'. The first two have '-' icons, and the third has a '+' icon. There is also an 'Inherited' checkbox.
- double:** A text input field with a '+' icon.
- int128:** Two text input fields with values '7485896896' and '2456778893'. The first has a '-' icon, and the second has a '+' icon.
- attr:string20:** Two text input fields with values 'Monday' and 'Tuesday'. The first has a '-' icon, and the second has a '+' icon.

At the bottom right, there are 'CREATE' and 'CANCEL' buttons.

Image 42: Specifying multi-value attributes

The screenshot shows a window titled 'Document incl. Binary properties'. On the left is a table with columns: Title, Classification Code, Modified, and an action menu. The table contains one row: 'Document incl. Binary properties', '8/BINARY-100', '31. Mar 2020'. On the right is a detailed view of the document's properties, including:

- Title:** Document incl. Binary properties
- Description:** Binary properties
- Parent:** Maintenance
- Created:** Administrator 31. Mar 2020, 09:11
- Modified:** Administrator 31. Mar 2020, 09:44
- Status:** Opened INHERITED
- Security class:** Confidential INHERITED
- Significance:** Retain INHERITED
- Owner:** Marko Hren
- Keywords:** binary property
- Categories:** Properties
- Binary:** A grid of 8 file icons representing binary data.
- Retention:** A section for retention settings.

At the bottom, there is a taskbar with several 'Binary (X).dib' files and a 'Show all' button.

Image 43: Display and selection of binary values

4.2.3.1.3 System metadata

Unlike the general metadata, which are publicly accessible and can be edited and changed by the user, the system metadata are read-only. The user can access them by selecting the arrow in front of the »More« record.

For more information see chapter [General system attributes](#).

Shipping release note

Details Security Activity

Title	Shipping release note
Description	Document enabling the buyer to take delivery of a shipment
Parent	ts datetime
Created	admin admin 22. Sep 2023, 13:29
Modified	admin admin 5. Oct 2023, 08:14
Status	Opened INHERITED
Security class	Confidential
Significance	Retain
Owner	Alex Nelson
Keywords	release note
Categories	shipping
Retention	
More	
Classification Code	06-2023-000004/000004
Template	Dokument
Type	Document
Permanent	No
Authenticity evidence	22. Sep 2023, 13:31
Accessed	5. Oct 2023, 08:14
Identifier	khw7W15qyW0lBAoaVdXsaFPM_CuaL9Tv
External Identifiers	

Image 44: The Details tab in reading mode

4.2.3.1.4 Changing the display of metadata

Changing the display of metadata in the "Details" tab is possible in the settings of the file [settings.json](#), where the user can define which metadata will be displayed and which hidden, and the display order, which matches the order in the configuration.

Element "details.profiles.sections"

In the element "details.profiles.sections" the user defines which sections will be displayed:

- More
- Retention
- Versions
- References.

If this element has not been defined, all sections are displayed. An empty array in the settings means that no section is displayed.

details.profiles	Description
id	Profile identifier.
filter_type	Type of attribute filter. The set of values: - Include: certain attributes will be displayed. - Exclude: certain attributes will not be displayed.
attributes	Collection of attributes. If filter_type = Include, the order applies.
sections	Collection of displayed sections. If this element has not been defined, all sections are displayed.

Table 7: Setting the collection of displayed columns

Element "details.display.members"

In the element [details.display.members](#) the user defines to which users or group the setting refers. The user can define:

- Members Id
- Alias
- Subject.

If this element has not been defined, the setting applies to all users.

Element "details.display.archives"

In the element [details.display.archives](#) the user defines to which archives the settings apply.

The user can define:

- Archive Id.

If this element has not been defined, the settings apply to all archives.

details.display	Description
profile	Profile identifier from details.profiles.id.
templates	Collection of templates to which the profile applies. If this element has not been defined or is empty, it applies to all templates.
members	Collection of directory entities of type user or group. The "subject" or "alias" is defined for the user. If a group has been defined, the setting applies to all members.
archives	Collection of archives. If this element has not been defined or is empty, it applies to all archives.

Image 45: Settings for hiding and specifying the order of attributes in the file settings.json

4.2.3.1.5 Reference

The user with the effective Change references permission can add new references, edit and delete them.

In the References set the user is shown the references to other entities by clicking on the arrow in front of the name in open mode.

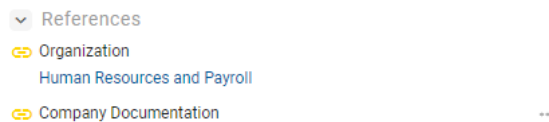


Image 46: References in the Details tab

For more information on editing a reference see chapter [Adding and editing references](#).

4.2.3.1.6 Email

In the Email set the user is shown the email metadata by clicking on the arrow in front of the name in the reading mode (Open). Only the documents created based on the email template are shown.

For more information see chapter [Email attributes](#).

▼ Email	
Subject	Tak for din interesse - her kan du hente dit uddrag af rapporten
From	to@herbertnathan.com
To	marko.hren@imis.eu
Cc	
Bcc	
Date	31. Aug 2015, 10:37
Message id	<0f48f69e2bb95ece50a94c4347b720d9@dijkstra.pil.dk>
Priority	
Signed	No

Image 47: Email data in the reading mode

In edit mode the user has the option to review email metadata but not to edit them.

Tak for din interesse - her kan du hente dit uddrag af rapporten		×			
	DETAILS	EMAIL	PHYSICAL PROPERTIES	SECURITY	RETENTION
Subject	Tak for din interesse - her kan du hente dit uddrag af rapporten				
From	to@herbertnathan.com				
To	marko.hren@imis.eu				
Cc					
Bcc					
Date	31. Aug 2015, 10:37				
Message id	<0f48f69e2bb95ece50a94c4347b720d9@dijkstra.pil.dk>				
Priority					
Signed	No				

Image 48: Email data in the editing mode

4.2.3.1.7 Physical content

The Physical properties set is available to the user only if the value of at least one attribute has been defined. By clicking on the arrow in front of the name in open mode, the user is shown the physical content metadata.

For more information see chapter [Physical content attributes](#).

Physical properties	
Identifier	ID435
Description	Building 4, Floor 2nd, Room 5, Cabinet 2, Shelf 1
Status	CheckedOut,26. Sep 2018, 11:47
Home location	Brnčičeva 41G
Current location	Dunajska cesta 56
Custodian	Alex Nelson
Return due	28. Sep 2018

Image 49: Physical content data in the reading mode

In edit mode the user has the option of editing all metadata.

Information about a new payment transaction ×


DETAILS
EMAIL
PHYSICAL PROPERTIES
SECURITY
RETENTION

Identifier	<input type="text" value="ID435"/>
Description	<input type="text" value="Building 4, Floor 2nd, Room 5, Cabinet 2, Shelf 1"/>
Status	<input type="text" value="CheckedOut"/> <div style="font-size: 0.8em; margin-top: 2px;">Status change 26. Sep 2018, 11:47</div>
Home location	<input type="text" value="Brnčičeva 41G"/>
Current location	<input type="text" value="Dunajska cesta 56"/>
Custodian	<input type="text" value="Alex Nelson"/>
Return due	<input type="text" value="09/28/2018"/> <input style="margin-left: 5px; width: 20px; height: 20px; background-color: #007bff; color: white; border: none;" type="button" value="📅"/>

Image 50: Physical content data in the editing mode

4.2.3.1.8 Save log

After checking the validity of electronic signatures and digital certificates upon capture,

a Save log is created. The user can review it in the open mode by selecting the  icon in the More section.

For more information see chapter [Checking the validity of the digital certificate](#).

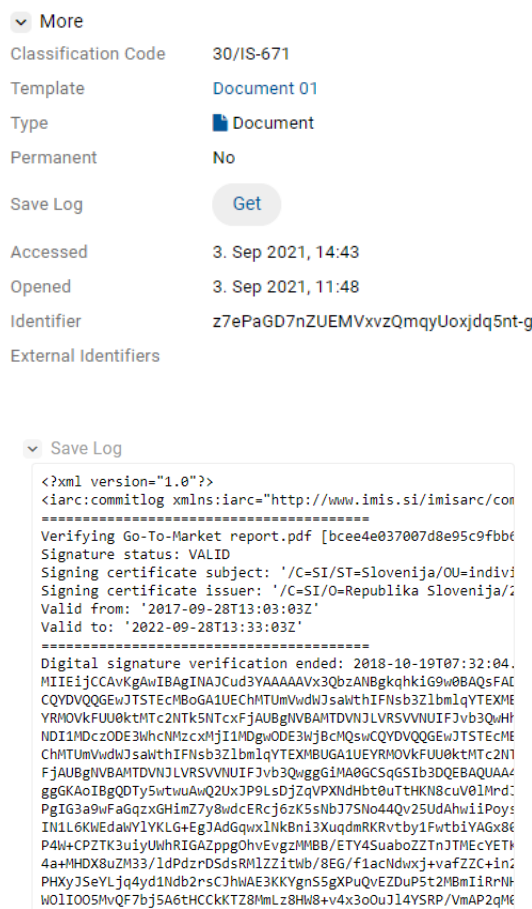


Image 51: A report on checking the validity of electronic signatures and digital certificates

4.2.3.1.9 Retention

A user with the »Change retention« effective permission is enabled the adding and editing of retention and disposition hold periods.

In the Retention set the user is shown the settings for the selected retention and disposition hold periods in the preview or reading mode by clicking on the arrow in front of the name.



Image 52: Retention and disposition hold periods in the »Retention« tab

By clicking on the Disposition hold title, a notification window opens, containing the following information:

- Name: unique name of the disposition hold.
- Description: a short description of the disposition hold.
- Reason: the reason for creating a disposition hold.
- Identifier: unique identifier of the disposition hold.

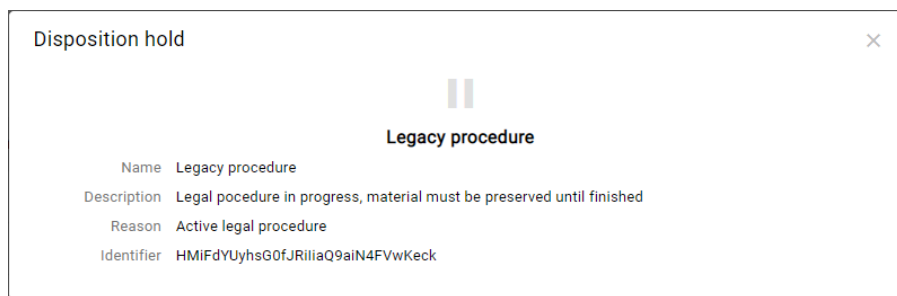


Image 53: Information on disposition hold

By clicking on an individual Retention policy title, a notification window opens, containing the following information:

- Name: unique name of the retention policy.
- Description: short description of the retention policy.
- Detailed description: detailed description of the retention policy.
- Action: the default action from the list of actions for entity.
- Identifier: unique identifier of the retention policy.
- Mandates: mandates for an individual retention policy.

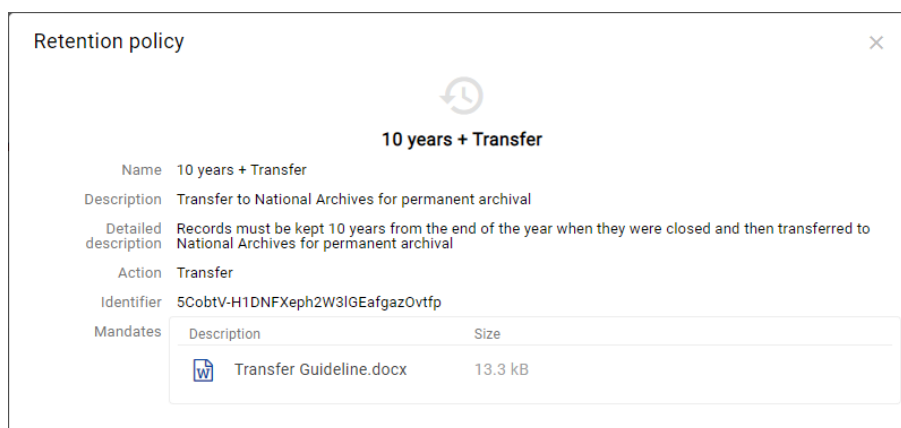


Image 54: Retention policy information

By selecting the command “Get”, the content opens for the user in the viewer.

For more information on editing retention and disposition hold periods see chapter

[Editing retention policies.](#)

4.2.3.2 The Security tab

The Security tab is intended for reviewing the access control list (ACL) or the list of explicit permissions of groups or users on the entity and its metadata.

The list of permissions granted to the user (on the selected entity) consists of the following permissions:

- Read: permission to read data on the selected entity (view metadata and content files).
- Write: permission to edit entity data (write metadata and add content files).
- Move: permission to move the entity within the classification scheme.
- Delete: permission to delete entity data (delete metadata and remove content files).
- Create entities: permission to create sub-entities inside the selected entity.
- Change permissions: permission to change the effective permissions of other users on the selected entity.
- Change security class: permission to change the security class of the selected entity.
- Change status: permission to change the status of a selected entity.
- Change retention: permission to read and change the content of »Retention« tab.
- Create references: permission to create a reference to another reference.

In the preview mode the user is shown a list of the access control list (ACL) for the logged user.

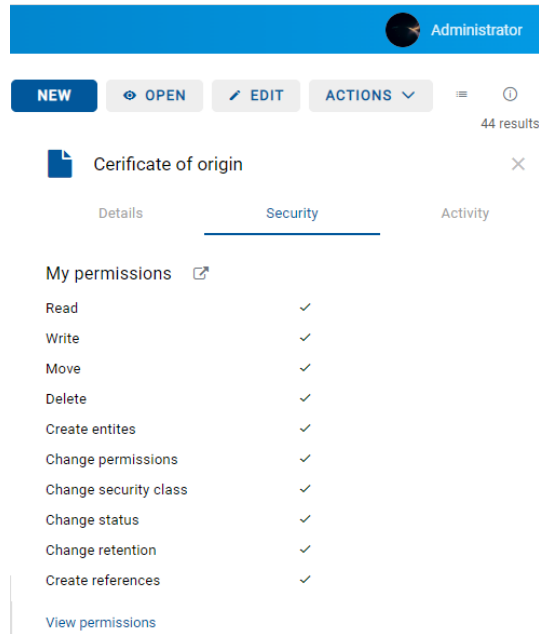


Image 55: The Security tab for a logged user in the preview mode

By selecting View permissions below the list of access permissions, when in read-only mode the user is shown a list of all directory entities that have been granted at least one explicit permission on the selected entity in the access control list (ACL).

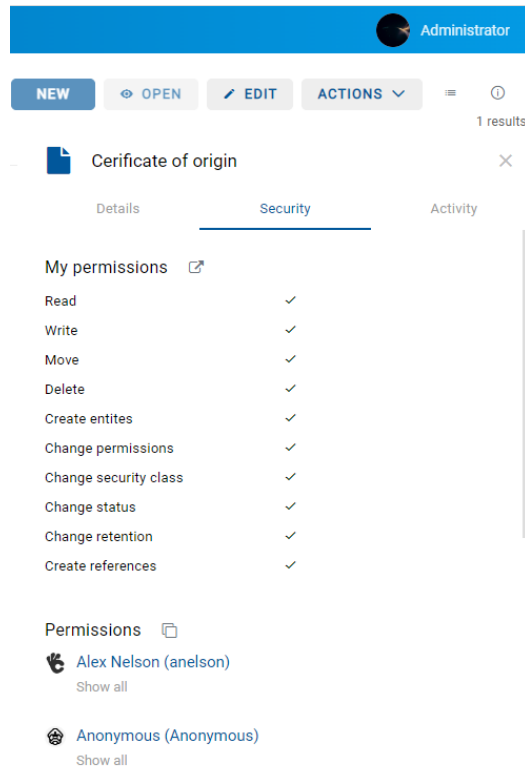



Image 56: A list of directory entities with access rights to the entity in the reading mode

By selecting “Show all”, the current status of effective permissions for the selected user is shown.

By selecting the icon  in reading mode, the user can copy all the explicit permissions of all users on the entity to speed up the entry of access permissions. The user then pastes the permissions to another entity.

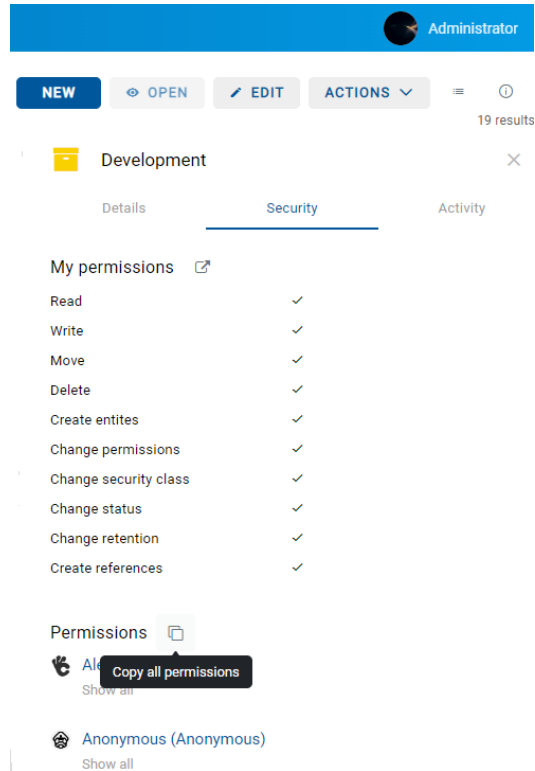


Image 57: Copying the explicit permissions of all users on the entity

4.2.3.3 The Activity tab

The Activity tab shows the audit log for the selected entity. This tab is shown to the user with the AuditLogQuery role.

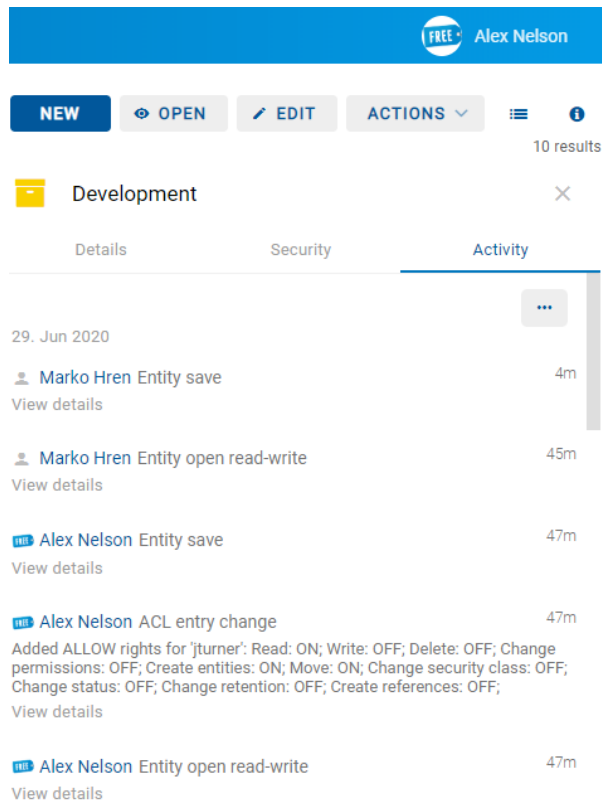


Image 58: The Activity tab in the preview and reading mode

The audit log records the following information:

- User: the name of the user who performed an action on the selected entity. By clicking on the user’s name, a notification window opens, showing user information.
- Event type: a type of event that was performed on the selected entity.

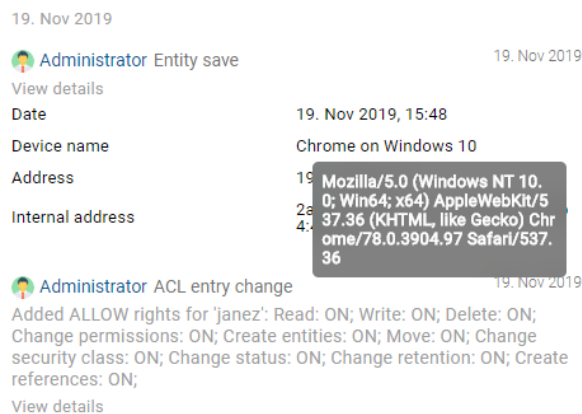


Image 59: Information about the user who performed an action on the entity

- **Date:** a time when an action was performed on the selected entity.
- **Device name:** the name of device, from where the command to perform the action on the selected entity came from.
- **Address:** the network address from where the command to perform the action on the selected entity came from.
- **Internal address:** IP address, which is set by opening a new session with the REST service.

When choosing the »Export« command in the right upper button, a popup menu appears with the possible audit log export formats for the selected entity. The supported formats are CSV and XML.

After selecting the format, the user is shown a notification in the bottom left corner about the downloaded content.

In the popup menu the user has the option of selecting actions. By selecting the action “Open”, the user has the option of saving the audit log to the file system.

4.2.4 Command bar

After the user logs in to the selected archive, the following commands appear in the command bar above the information on the selected entity:

- **New:** creates a new root class or contained entity.
- **Open:** opens the selected entity in the reading mode.
- **Edit:** opens the selected entity in the editing mode.
- **Actions:** contains commands for performing various operations on the selected entity:
 - **Status:** edits the status of the entity via a dialog box, which also offers the option to enter the reasons for the changes performed.
 - **Security class:** changes the entity's security class via a dialog box, which requires the user to enter the reasons for the change performed.
 - **Share:** copying the link to the selected entity to be shared with other users.
 - **New reference:** adding a connection to another entity in the classification scheme via a dialog box. For more information see chapter [The Details tab](#).
 - **New version:** creating a new version of the selected document in the classification scheme via a dialog box. For more information see chapter [Versioning](#).
 - **Classification code:** changes the classification code of the selected entity.

- Move: moves the selected entity around the classification scheme of the archive.
- Delete: deletes the selected entity.
- Import: imports the selected entities to the archive.
- Export: exports the selected entities of the archive.

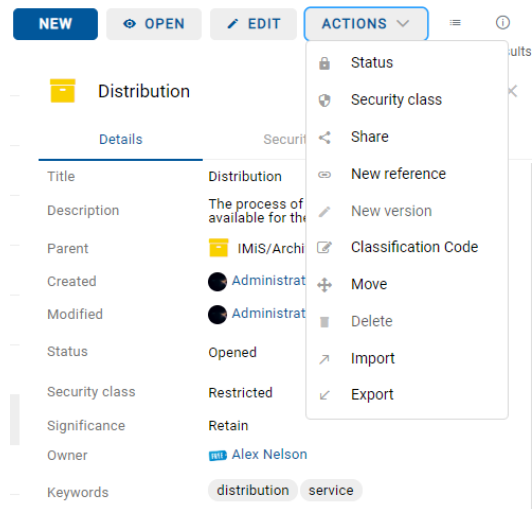



Image 60: Command bar above the information of the selected entity

Below the command bar is the search results counter. It displays the number of entities on the list in the central view.

To the right of the icon for the entity display mode, the user can close or open the right view with entity information by selecting the icon .

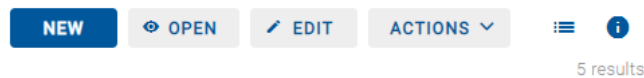


Image 61: Enabling/disabling the display of entity information

4.2.5 Menu functions

By selecting the user's name or icon, the following commands are available in the popup menu:

- Profile: information about the user.
For more information see chapter [User information](#).
- Activity: information about audit log events for the selected user and entity.
For more information see chapter [Searching audit log events](#).

- Reports: reports on document contents, retention periods, reviews, access permissions, classification schemes, entities, deleted entities and entities waiting for deletion. For more information see chapter [Reporting](#).
- Log out: log out from the application. After logging out of the selected archive, a dialog box appears for the user to log in again to the selected archive.
- About: information about the application.

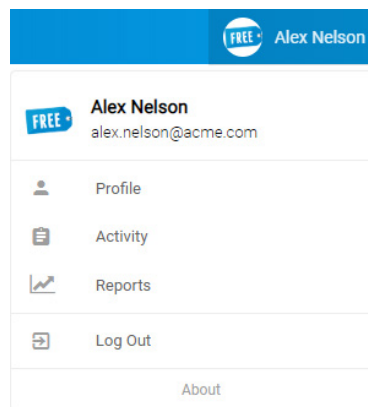


Image 62: Popup menu in the header of the user interface

4.2.5.1 User information

By selecting on Profile, a dialog window opens, showing the following sections:

- Details
- Security
- Settings
- Search History

Note: The user leaves the profile settings by selecting the name of the IMiS®/wClient application or archive (e.g. IMiS/ARChive Server).

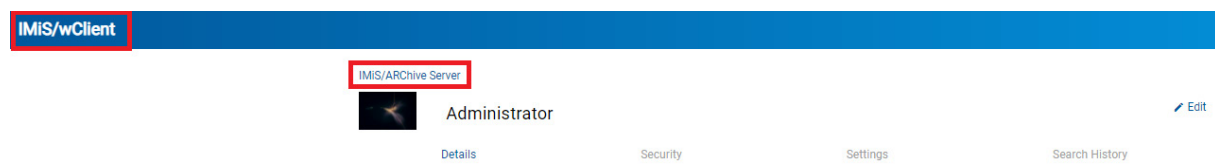


Image 63: Transition from profile settings to the entity review in the archive

4.2.5.1.1 The Details tab

The “Details” tab contains the following information on the logged-on user:

- First name: the first name of the user.
- Last name: the last name of the user.
- Email: the email address of the user.
- Security class level: the security class level of the user.
- The modified value is shown after 15 minutes or after logging out and logging back in. The administrator has a special value (1) which is not mapped to the text.
- Created: the user that created the directory entity and the date and time of creating the directory entity.
- Modified: the user that last edited the directory entity and the date and time of the last change to the directory entity.
- Aliases: alternative names of the directory entity with which the directory entity can access the archive.
- Member of groups: view of the list of groups of which a specific user is a member.
- Type: a directory entity type (user, group).
- Identifier: the unique identifier of the user.

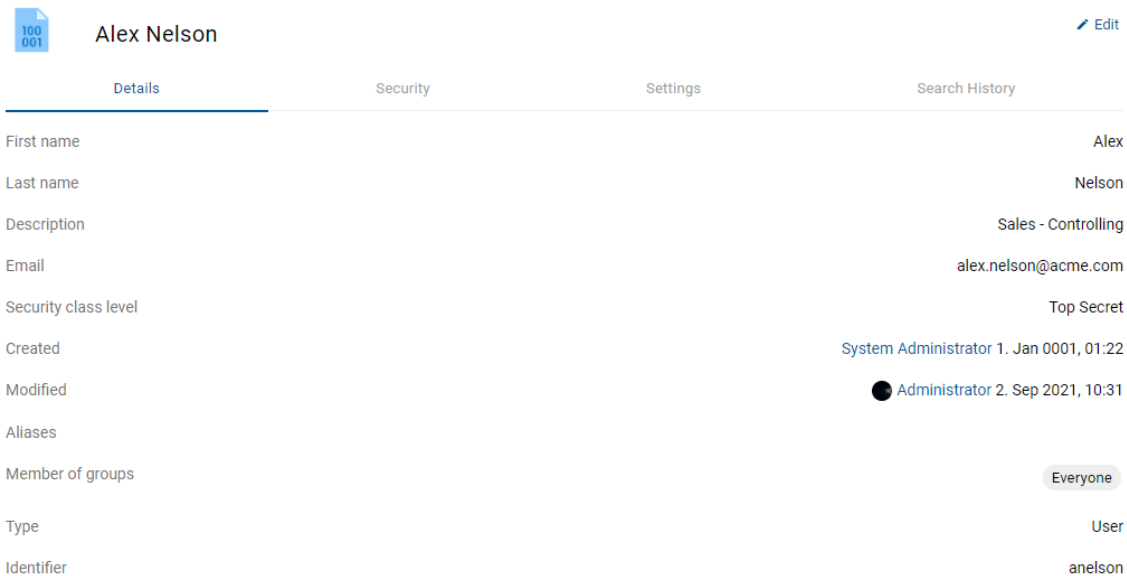


Image 64: Display of details in the “Basic” tab

By selecting the action “Edit”, the user edits information in the “Basic” tab.

The user has the following icon (avatar) management options:

- Change avatar: selecting a new image file from the file system. The change becomes effective as soon as the file selection is confirmed.
- Remove avatar: removal of the existing image. The change is executed immediately. After the removal it is replaced by the default image.

Alex Nelson

Details Security Settings Search History

Change avatar Remove avatar

First name

Last name

Description

Email

Security class level Top Secret

Created System Administrator 1. Jan 0001, 01:22

Modified Administrator 2. Sep 2021, 10:31

Aliases

Member of groups Everyone

Type User

Identifier anelson

Save Cancel

Image 65: Editing user details

Connected accounts

When defining the connected accounts, the logged-on user manages the external identities, which can be used to log in to IMiS®/ARCHive Server.



Image 66: Display of connected accounts available

Note: The action “Connect” is enabled if the parameter “Enabled” under “Identity linking” is checked in the IMiS®/ARCHive Server (wAdmin) settings.

By selecting the action “Connect”, an authorization page opens at the external identity provider, where the user allows the use of the external identity or enters the username and password. After a successful authorization, the link is added to the profile of the logged-on user under the connected accounts listed.

The logged-on user removes the link by selecting the action “Remove”.

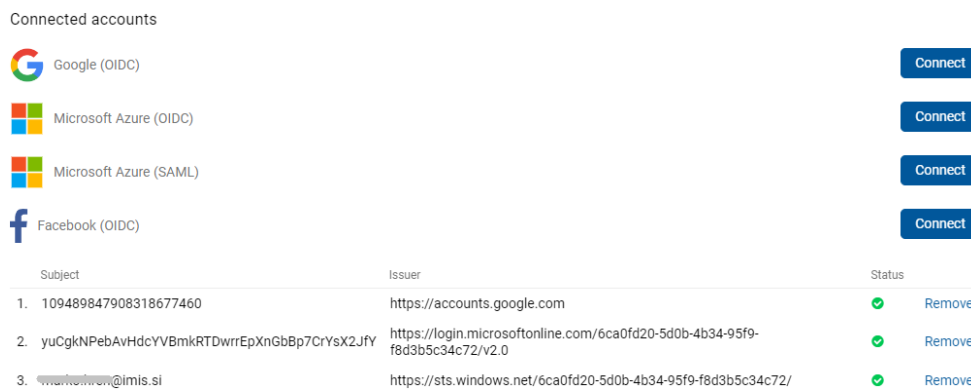


Image 67: A link added to the logged-on user's profile

Note: For more information on setting editing permissions see chapter “Server Configuration” / “Authentication” in the IMiS®/ARCHive Server Manual.

4.2.5.1.2 The Security tab

The “Security” tab is used to manage the “Password” and review the “Session history”.



Image 68: Display of the “Security” tab

Note: By unchecking the parameter “Show closed”, the list shows only active sessions. On the right, the user can see the displayed sessions counter.

Password

By selecting the action “Change password”, the user is shown a dialog box for entering the current password and the new password, which the user must confirm. The user confirms the final change of password by selecting the command “Change password”.

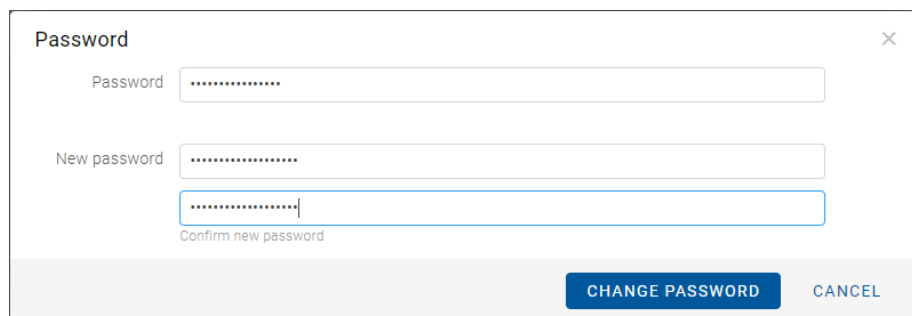
The image shows a dialog box titled 'Password' with a close button (X) in the top right corner. It contains three input fields: 'Password' (with a masked password), 'New password' (with a masked password), and 'Confirm new password' (with a masked password). At the bottom of the dialog, there are two buttons: 'CHANGE PASSWORD' (in blue) and 'CANCEL'.

Image 69: Display of the window for changing the user password

By selecting the action “Logout”, the logged-on user can close the current session, while the user with permission (administrator) can close the active session of another user.

To make searching for attributes on a list easier, the user with permission can use the browser. By entering at least two characters of the search string, the user narrows the scope of the search results displayed on the list.

4.2.5.1.3 The Settings tab

The “Settings” tab is used to manage the view of entities and set the parameters for connecting to the IMiS®/wScan scanning module.

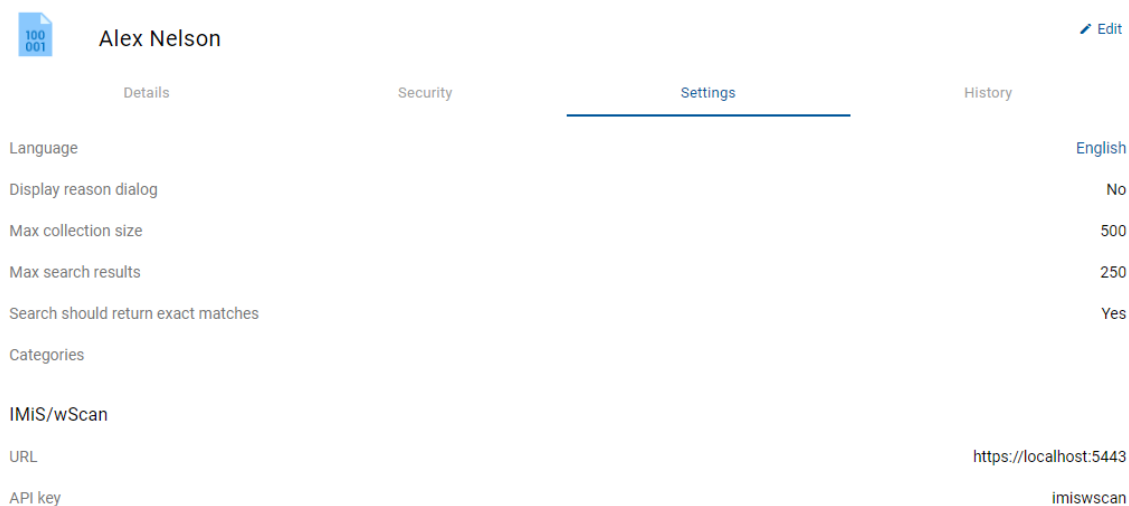


Image 70: View of the “Settings” tab

Under the settings of the view of entities, the logged-on user can set the following attribute parameters and values:

- Language: Selecting the display language. After confirmation the user interface is displayed in the selected language.



Image 71: Language selection dialog

- Display reason dialog
By checking the parameter, the user enables the display of the dialog box for entering the reason for performing the action.

The dialog box shows an additional field for the user to (optionally) enter the reason before performing any of the following actions:

- Creating an entity (dialog box, input field).
- Modifying a template (dialog box).

- Opening an entity (dialog box).
- Editing an entity (dialog box).
- Creating a new version of the entity (dialog box, input field).
- Adding an entity to the queue for indexing or conversion (dialog box).

The user can disable the entry of the reason when first entering the reason for performing the action. The setting applies to any subsequent execution of the above-mentioned actions.




Image 72: Dialog box for disabling the entry of the reason for performing actions

- Max collection size
By defining the attribute value, the user limits the number of entities shown on the list. The default value is defined in the settings (assets/settings.json).
- Max search results
By defining the attribute value, the user limits the number of entity search results shown on the list. The default value is defined in the settings (assets/settings.json).
- Search should return exact matches.
By checking this parameter, the logged-on user defines that the search will be performed with the search engine built into the archive.
The default value is "False" and can be changed in the file [settings.json](#) (search.exact_match).
- Categories
If the user selects a categorized Keywords view (sys:Keywords or sys:Category) in the entity view mode, the categorization settings are saved for the template under which the categorization was performed.
For more information on categorized views see chapter [View mode](#).

The screenshot shows the user profile for Alex Nelson with a document icon labeled '100 001'. The 'Settings' tab is active, showing the following options:

- Language: English
- Display reason dialog:
- Max collection size: 500
- Max search results: 250
- Search should return exact matches:
- Categories: (empty)

Buttons for 'Reset', 'Save', and 'Cancel' are visible at the bottom right of the settings area.

Image 73: Showing the basic settings

The action “Reset” enables the user to restore the original status and set the default value.

IMiS®/wScan

While defining the parameters for connecting the IMiS®/wClient web client with the IMiS®/wScan scanning module, the user can set the following attribute values:

- URL: Address of the IMiS®/Storage Connector Services REST
- API key: Security key preventing unauthorized use of the API.

The screenshot shows the configuration page for IMiS/wScan with the following details:

- URL: https://localhost:5443
- API key: imiswscan
- Status: ✔ Verified [Reset](#)

Buttons for 'Save' and 'Cancel' are located at the bottom right.

Image 74: Setting the parameters in the “IMiS®/wScan” tab

The action “Reset” enables the user to restore the original status and set the default value.

Before capturing scanned documents, the settings of the service address (URL) and the security key (API key) must be coordinated with the settings of the IMiS®/Capture Service in the “Security” tab.

Verifying the validity of the service address settings is performed in editing mode automatically when modified, or on demand by clicking on the verification status text (Not verified, Verified).

IMiS/wScan

URL

API key

✖ Not verified [Reset](#)

[Save](#) [Cancel](#)

Image 75: Validity of the service address settings not verified

IMiS/wScan

URL

API key

✔ Verified [Reset](#)

[Save](#) [Cancel](#)

Image 76: Validity of the service address settings verified

4.2.5.1.4 The Search history tab

The “Search history” tab is used to view the last searches performed by the logged-on user.

Alex Nelson

[Edit](#)

Details	Security	Settings	Search History
			Clear all
maxDepth:3			6. Sep 2021, 11:52 Remove
title:"Shipping costs" content:manufactured			6. Sep 2021, 11:51 Remove
title:"Shipping costs" after:2021-09-06			6. Sep 2021, 11:51 Remove
title:"Shipping costs"			6. Sep 2021, 11:50 Remove
owner:anelson			6. Sep 2021, 11:49 Remove
production			6. Sep 2021, 11:49 Remove

Image 77: View of the “Search history” tab

The user can remove the search result record by selecting the action "Remove".

4.2.5.2 Information about audit log events

By selecting the command "Activity", the user is shown information about audit log events for the selected user and entity. More information on the Activity action is available to the user in the chapter [Searching audit log events](#).

4.2.5.3 Reports

The IMiS®/wClient enables users with a Reports role on the server to create reports on the IMiS®/ARChive Server. Logged-on user can create report on folders, documents, document contents, retention, reviews, user access, entities, classification scheme

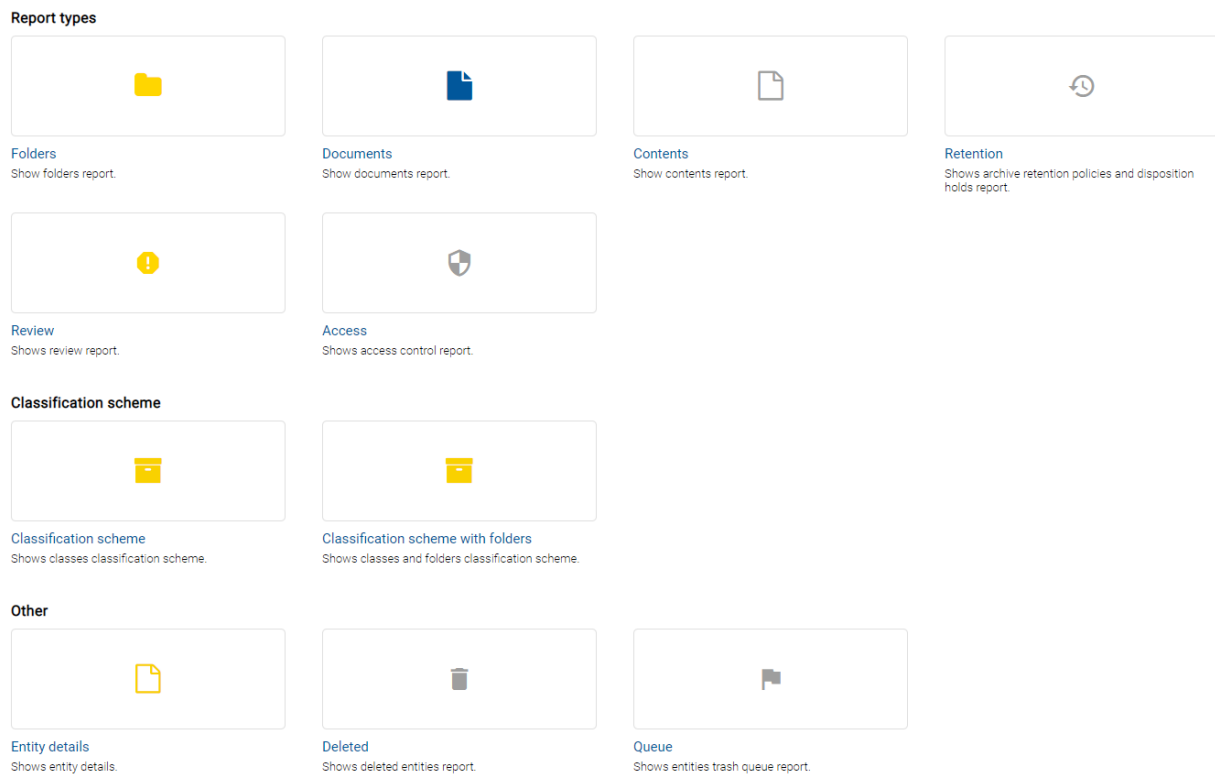


Image 78: Report types

For more information on specific report see chapter [Reporting](#).


4.2.5.4 Logout

By selecting the Log out command, the user logs out of the archive. A login window appears for logging in to the archive. For more information see chapter [Login and logout](#).

4.2.5.5 About

By selecting the “About” command, the user is shown information about the application and licensing terms. More information on the About command is available to the user in the chapter [About](#).

4.2.5.6 Display of entities

By selecting the icon  to the right of the command bar, the user can define the display mode for the list of entities.

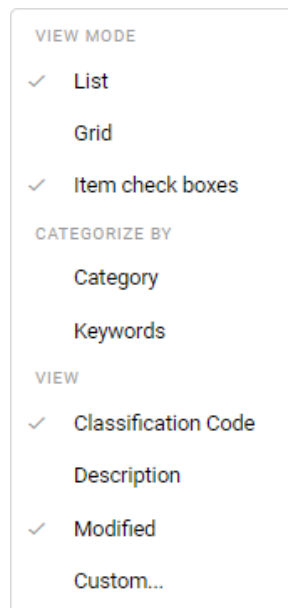


Image 79: Setting the display of entities

4.2.5.6.1 View mode

In the View mode, the user defines how the entities are displayed in the central view and marks entities for performing actions. The available options are:

- List
- Grid
- Item check boxes.

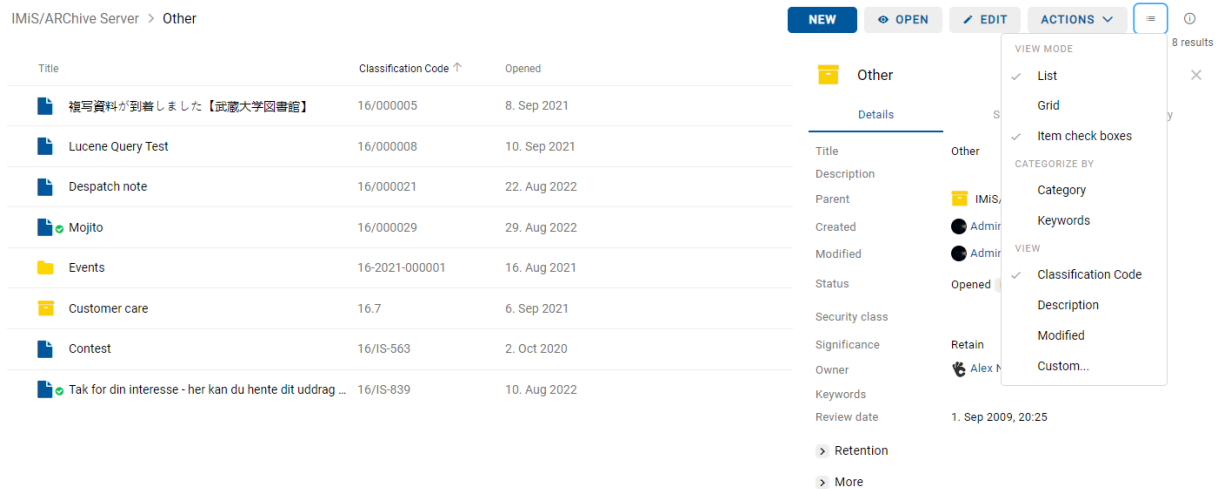


Image 80: Entities shown on a list

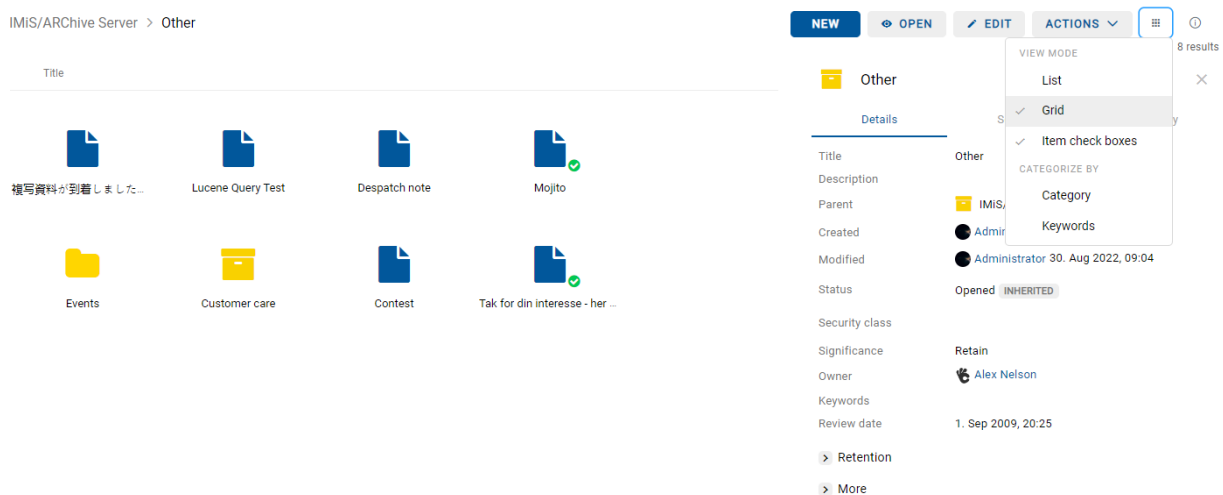


Image 81: Entities shown in a grid

By selecting the option Item check boxes in the menu, the user can mark the individual entities which will be moved or deleted in the next step. The user can also do that by holding down the Ctrl key on the keyboard and selecting the entity, or by selecting the entity and pressing the Space key.

The command bar displays the number of entities selected (X Items Selected).

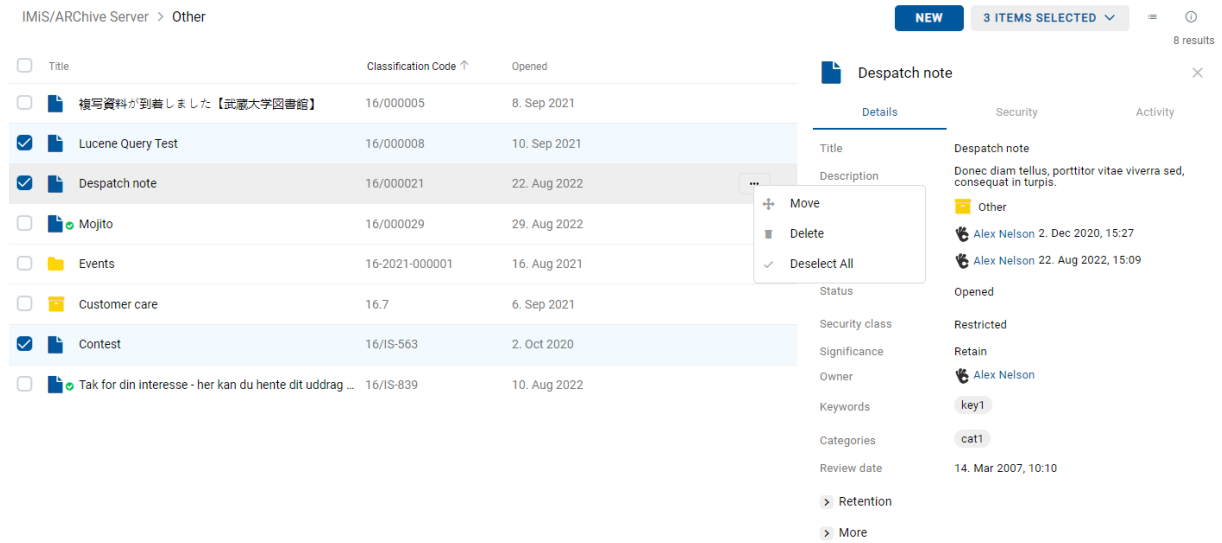


Image 82: Selecting individual entities for move and deletion

The user can select all the displayed entities at once. The user does that by checking the checkbox left of the “Title” column.

By doing so, the user selects all the loaded entities, but not the entire collection.

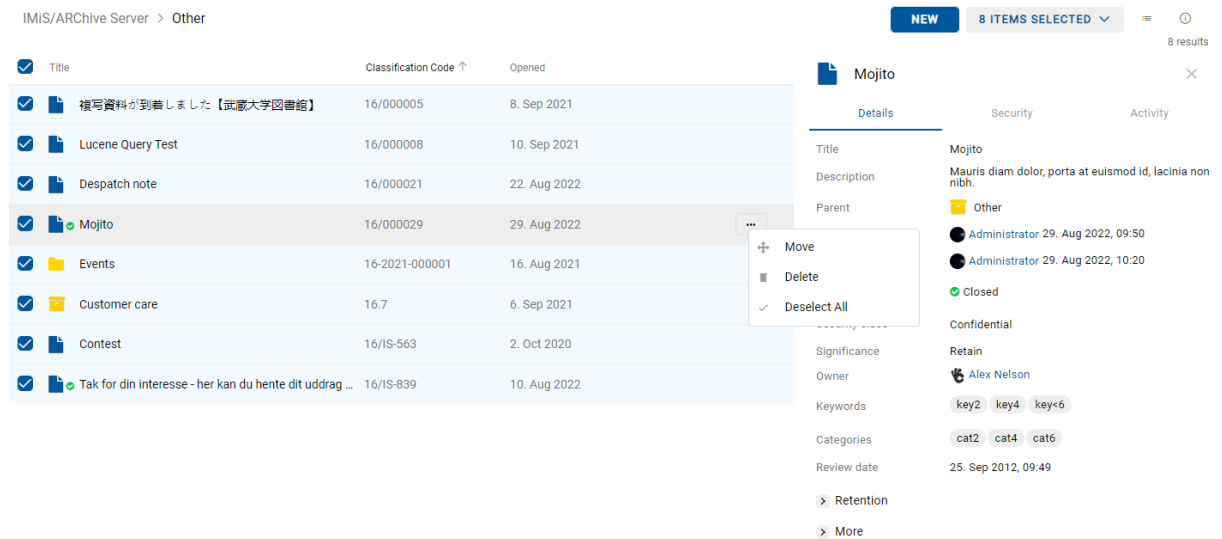


Image 83: Selecting all the loaded entities for move or deletion

The user can select only a part of the displayed entities. The user does that by first selecting the entity from the list. The user then selects another entity by simultaneously holding down the Shift key on the keyboard.

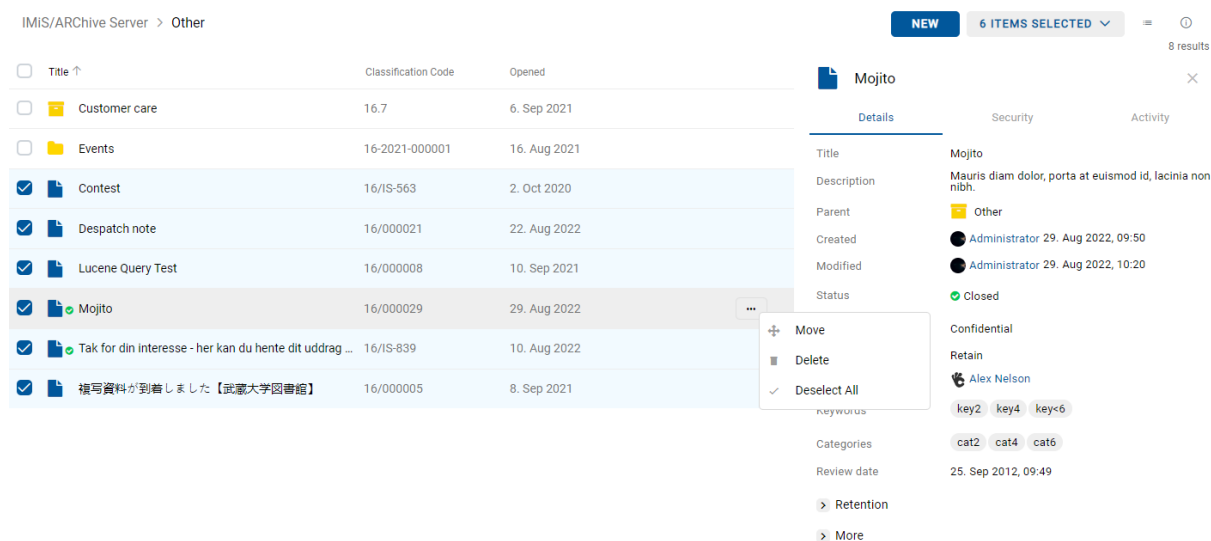


Image 84: Selecting a part of the loaded entities for move or deletion

By selecting the arrow next to the number of entities selected, a menu opens with the following options:

- Move
- Delete
- Deselect all.

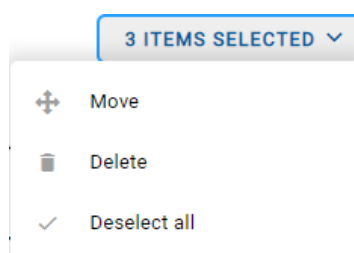


Image 85: Set of actions on selected entities

The procedure of moving multiple entities is the same as the procedure of moving a single entity. For more information see chapter [Entity move](#).

Likewise, the procedure of deleting multiple entities is the same as the procedure of deleting a single entity. For more information see chapter [Deletion of an entity](#).

4.2.5.6.2 Categorization

In the Categorize by set the user defines how the entities are classified in the central view. Categorization enables a view of entities belonging to the same category at the same hierarchical level.

Two categorization options are available:

- Category
- Keywords.

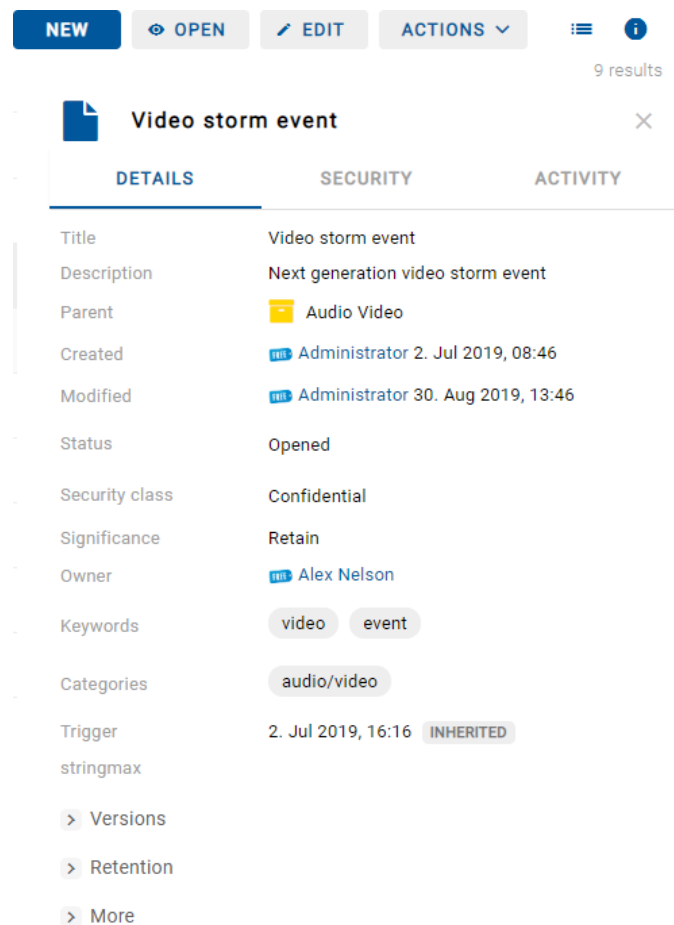


Image 86: An example of an entity with a defined value of the Categories attribute

If the value of the Categories attribute has been defined, the central view shows the user a list of entities classified into the same category at a specific hierarchical level.

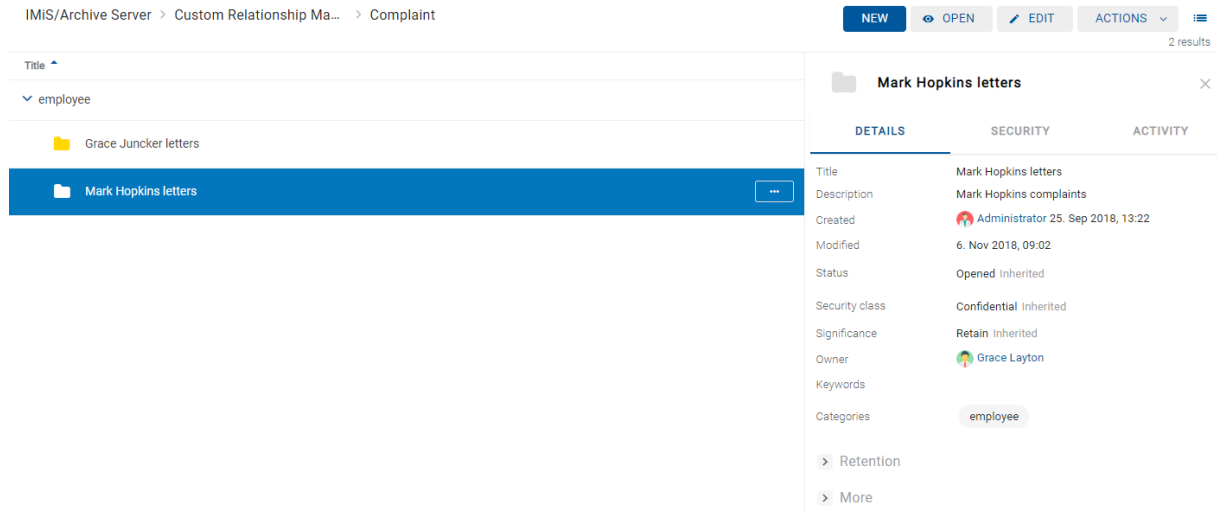


Image 87: A categorized Categories view

If the value of the Keywords attribute has been defined, the central view shows the user a list of entities with the same keyword at a specific hierarchical level.

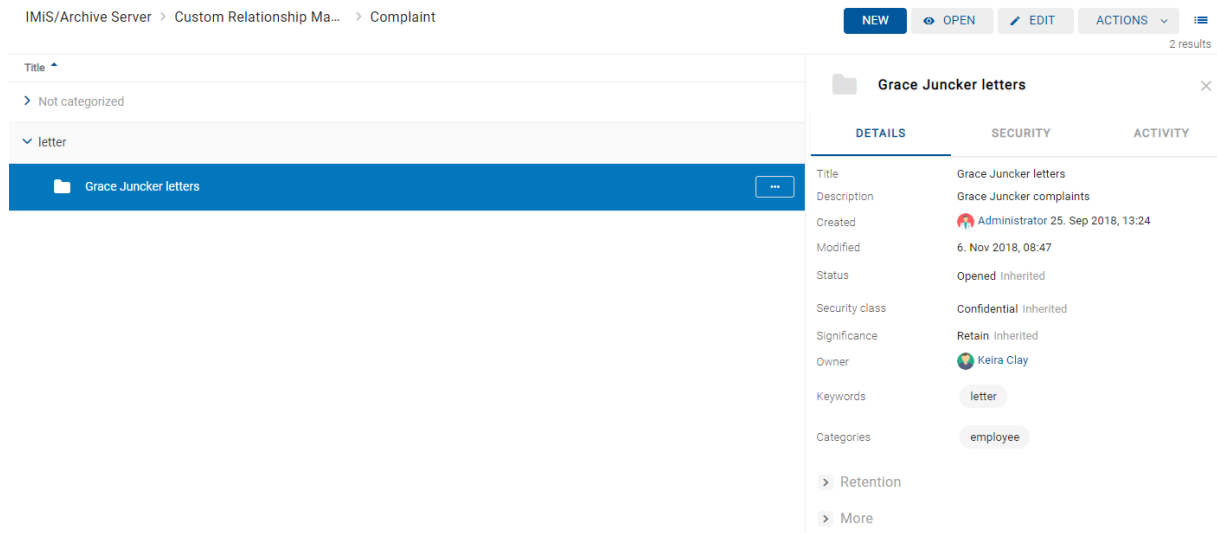


Image 88: A categorized Keywords view

4.2.5.6.3 View

The default view settings for the columns of selected attributes are defined in the settings `settings.json`, where they can be defined in the elements `collections.profiles` and `collections.views`.

collections.profiles	Description
Id	Profile identifier.
Columns	Collection of displayed columns. The collection type can be object or string.

Table 8: Setting the view of columns

collections.profiles.columns	Description
Id	Attribute identifier.
min_width	Minimum width of the table in px, where the column is displayed.
width	Column width in %.

Table 9: Setting the width of the displayed column


collections.views	Description
archives	Collection of archive identifiers.
profile	Profile identifier from collections.profiles .
members	Collection of directory entities.
classification_code	Collection of classification codes.
context	Display context (optional). The set of values: <ul style="list-style-type: none"> - ARCHIVE - MY_ENTITIES - DRAFTS - DIRECTORY - REVIEWS - EXPORT - IMPORT - DELETED - DISPOSED - QUEUE.

Image 89: Setting the collection of displayed columns

The screenshot shows the 'IMIS/ARChive Server' interface. A table lists various attributes with columns: Title, Description, Significance, Opened, Owner, Keywords, Review date, and Date. A red box highlights the 'Title' column header. To the right, a side panel titled 'IMIS/ARChive Server' contains a dropdown menu with options like 'Audit Query', 'Content Management', 'Import/Export', 'Reports', 'Draft management', 'Content Convert', 'Content Detach', 'Content Index', and 'Content Move'.

Title	Description	Significance	Opened	Owner	Keywords	Review date	Date
Administration	Documents, Administrati...	Retain	10. Sep 2021	Alex Nelson (... admin		6. Jun 2007	
Development	Technical knowledge to ...	Retain	19. Mar 2020	Alex Nelson (... key3, 11231		19. Feb 2010	
Distribution	The process of making t...	Retain	13. Mar 2020	Alex Nelson (... distribution, s...			
Maintenance	Mauris diam dolor, porta ...	Retain	26. May 2021	Keira Clay (kcl... key2		28. May 2009	
Manufacturing	Manufacturing documents	Vital	21. Sep 2020	Alex Nelson (... production, pr...		1. Sep 2010	
Other			2. Jun 2020	Alex Nelson (...		1. Sep 2009	
Production	Production documents	Retain	25. Feb 2020	Marko Hren (... creation		2. Oct 2002	
Support		Retain	28. Apr 2020	Marko Hren (... key1		9. Apr 2014	

Image 90: Default settings for the view of the columns of selected attributes

By selecting the icon  in the row with attribute titles, a popup menu opens. By selecting the desired attribute title, the user defines which columns of the selected attributes besides “Title” will be shown in the central view.

The screenshot shows the 'IMIS/ARChive Server > Other' view. A table lists attributes with columns: Title, Classification Code, Opened, and Owner. A dropdown menu is open for the 'Other' attribute, showing options like 'Longplay', 'Modified', 'Opened', 'Owner', 'Partner', 'Predmet', 'Review date', 'Security class', 'Šifra DMS', and 'Šifra partnerja'. The 'Owner' option is selected.

Title	Classification Code	Opened	Owner
Customer care	16.7	6. Sep 2021	Alex Nelson (anelson)
Events	16-2021-000001	16. Aug 2021	Alex Nelson (anelson)
Contest	16/IS-563	2. Oct 2020	Alex Nelson (anelson)
Despatch note	16/000021	22. Aug 2022	Alex Nelson (anelson)
Lucene Query Test	16/000008	10. Sep 2021	
Mojito	16/000029	29. Aug 2022	Alex Nelson (anelson)
Tak for din interesse - her kan du hente dit ...	16/IS-839	10. Aug 2022	Alex Nelson (anelson)
複写資料が到着しました【武蔵大学図書館...	16/000005	8. Sep 2021	

Image 91: Selecting the columns of selected attributes

Selected attributes are added to or removed from the view of the entities list.

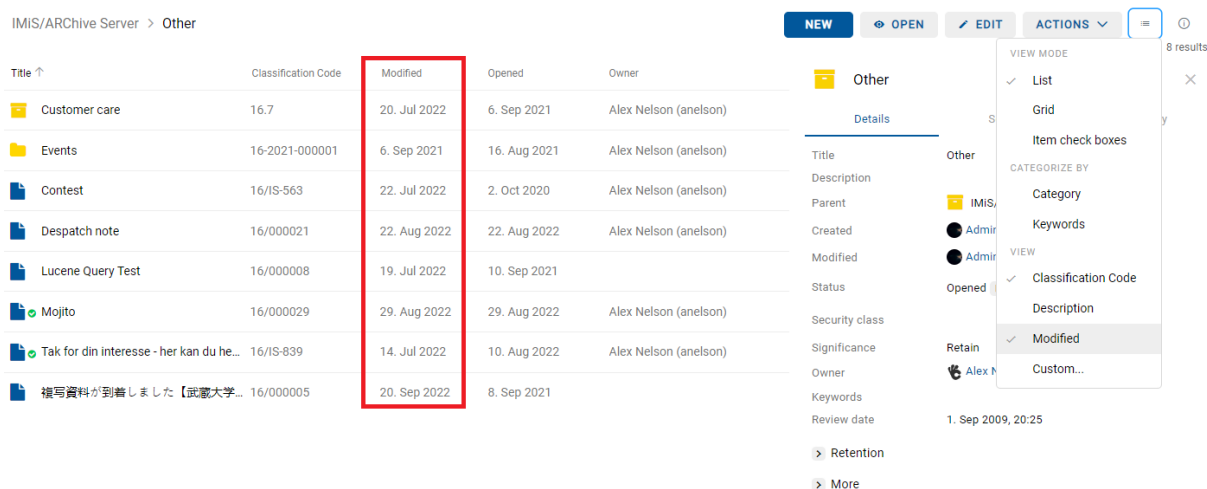


Image 92: Display of the added column of selected attribute "Modified"

If the user selects the action "Custom" in the popup menu, the user can select the columns of selected custom attributes.

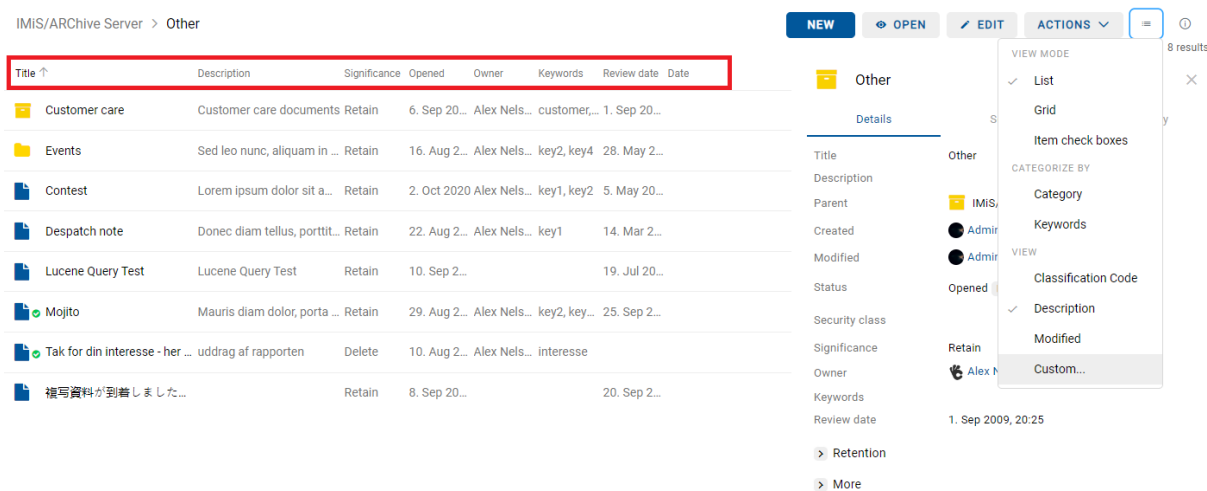


Image 93: Display of the columns of selected custom attributes

The user can define which attributes will be displayed, and the display order and mode:

The logged-on user can define:

- The attributes to be displayed.
- The order of displayed attributes.
- The display mode;
 - Visibility: defines when the column of the selected attribute is displayed based on screen width.
 - When selecting the view "Big screens", the column is displayed only when the table width exceeds 1000px.
 - When selecting the view "Medium-sized screens", the column is displayed only when the table width exceeds 792px.
 - When selecting the view "Small screens", the column is displayed only when the table width exceeds 568px.
 - When selecting the view "Always", the column is always displayed.
 - Width: Field width in percent (%). The set of values ranges from 0 to 100.

Identifier	Label	Visibility	Width in %	Description
<input checked="" type="checkbox"/> sys:Title	Title	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		
<input type="checkbox"/> sys:ClassificationCode	Classification Code	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		
<input type="checkbox"/> sys:Description	Description	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		
<input type="checkbox"/> sys:Modified	Modified	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		
<input checked="" type="checkbox"/> Review Trigger	Review date	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="text"/>	The review date log
<input checked="" type="checkbox"/> sys:Creator	Creator	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="text"/>	Entity creator
<input checked="" type="checkbox"/> sys:Owner	Owner	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="text"/>	Entity custodian
<input checked="" type="checkbox"/> sys:Significance	Significance	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="text"/>	Entity significance state
<input type="checkbox"/> sys:SecurityClass	Security Class	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="text"/>	Entity Security Class
<input type="checkbox"/> sys:Status	Status	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="text"/>	Entity status
<input type="checkbox"/> sys:Opened	Opened	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="text"/>	Date and time when entity's status was set to 'Opened'
<input type="checkbox"/> sys:Closed	Closed	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="text"/>	Date and time when entity's status was set to 'Closed'
<input type="checkbox"/> sys:Keywords	Keywords	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="text"/>	Entity keywords
<input type="checkbox"/> sys:Category	Category	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="text"/>	Default container of Entity categories
<input type="checkbox"/> sys:ExternalIds	External Identifier	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="text"/>	Entity unique external ids
<input type="checkbox"/> DirectoryEntity	Directory Entity	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="text"/>	
<input type="checkbox"/> sys:Created	Created	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="text"/>	
<input type="checkbox"/> Date	Date	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="text"/>	
<input type="checkbox"/> evaluation	Evaluation	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="text"/>	

Reset Reset all **Save** Cancel

Image 94: Selecting the columns of selected custom attributes

The user can delete the settings for the selected entity by selecting the action "Reset" in the bottom left corner and selecting the action "Save". Selecting the action "Reset all" and selecting the action "Save" deletes the settings for the columns of selected attributes at the level of the entire archive.

After saving to the file [client:settings.json](#), the settings will be available to the user until the next modification.

collections.views	Description
classification_code	The classification code.
context	Display context (optional). The set of values: <ul style="list-style-type: none"> - ARCHIVE - MY_ENTITIES - DRAFTS - DIRECTORY - REVIEWS - EXPORT - IMPORT - DELETED - DISPOSED - QUEUE.
columns	Collection of displayed columns. The collection type can be object or string.

Table 10: Setting the view

collections.views.columns	Description
Id	The attribute identifier.
min_width	Minimum width of the table in px, where the column is displayed.
width	Column width in %.

Table 11: Setting the collection of displayed columns

4.2.6 Search

Located above the central view in the header of the user interface is the Search field.

It enables the user to search by the metadata of selected entities and to search by the entire text of the content of documents over the entire archive.

For more information on search options see chapter [Search functions](#).

4.3 Actions

This chapter describes the actions of the IMiS®/wClient on the selected archive:

- [Entity access](#)
- [Creating an entity](#)
- [Editing entity data](#)
- [Entity move](#)
- [Content management](#)
- [Versioning](#)
- [Search functions](#)
- [Archiving email messages](#)
- [Acquiring authenticity evidence](#)
- [Import](#)
- [Export](#)
- [Deleting an entity](#).

4.3.1 Entity access

Access to the entity in the classification scheme depends on the:

- Security class of the entities.
- User's security class level.
- User's access right.

4.3.1.1 Security class of the entities

This setting in the entity details specifies the set of available entity security classes based on the entity's position in the classification scheme.

For more information on security classes see chapter [Access](#) in the [IMiS®/ARChive Server user manual](#). Changing the security class of the entities is described in greater detail in the chapter [Changing the security class](#).

4.3.1.2 User's security class level

In the settings of the IMiS®/wAdmin administration web interface in the »Directory« folder, the user with permission specifies the »Security class level«.

This setting specifies the security class level of the content which the user is allowed to review. The user can review only the content whose security level is lower than or equal to the user's.

4.3.1.3 User's access right

In the settings of the IMiS®/wAdmin administration web interface in the Access control folder, the user with permission specifies the access permissions for each directory entity, which applies to a specific archive volume.

Under the settings, the user also specifies whether the permissions are inherited by the contained entities (Propagated) and whether the user can log in on behalf of a delegated user (Delegate context).

For more information on access rights see chapter [The Security tab](#).

When logging into the selected archive, the root classes of the archive to which the user has the Read right are read from the IMiS®/ARChive Server.

The user is shown the root classes in the Archive folder in the left view and in the list of contained entities in the central view.

By selecting a root class, the tabs in the right view, where the entity information is located, show only the publicly accessible information on the class. For more on the content of tabs see chapter [Entity information](#).

By selecting the Open command in the command bar, all of the data to which the user has read permissions are read from the server. The same applies to the access to entities contained in the archive's root classes.

A user with the Write permission on the selected entity can select the Edit command in the command bar. The same data are shown in the tabs as when selecting the Open command. The user can edit and change the values of attributes that are not tagged on the server as read-only. For more information see chapter [Editing entity data](#).

4.3.2 Creating an entity

The user can create root classes and sub-entities in the IMiS®/wClient, if he has the Create entities right on the selected class or folder.

For faster capturing and classifying of entities to appropriate places in the classification scheme, it is recommended that users separate (organize) the documents by type before capture.

Documents separation is performed by classifying documents into the appropriate templates in the classification scheme. Each template has predefined attributes, which are set by the administrator in the settings of the IMiS®/ARChive Server. The user must enter the mandatory attributes before saving.

The user has the option of modifying the template when editing an entity. By selecting the field with the values of the attribute Template, the list shows the available templates of the same type.

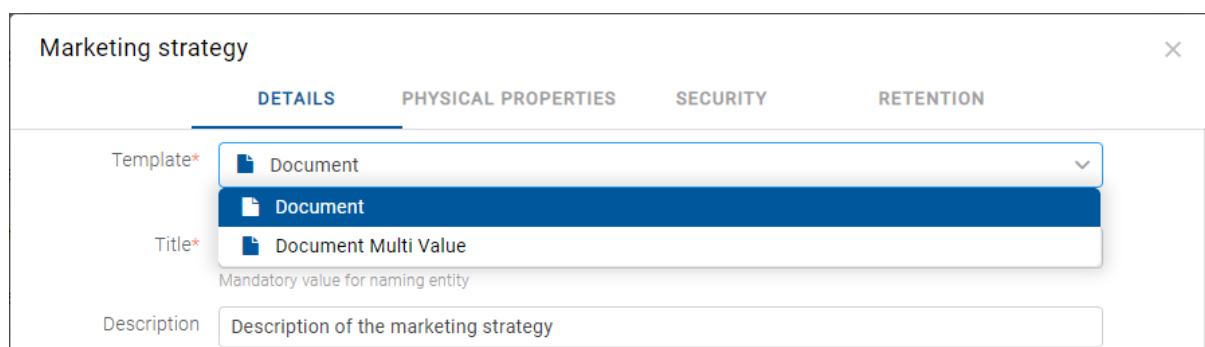


Image 95: Modifying a template in editing mode

For more information on templates see chapter [Templates](#) in the [IMiS®/ARChive Server Manual](#).

4.3.2.1 Creating a new entity

Besides the Create entities permission, the user has to have the Change retention permission to create new entities.

4.3.2.1.1 Creating a root class

By selecting the Archive folder in the left view, the user can add a new root class to the entities list. The user does that by selecting the “New” command in the command bar, selecting the relevant template from the list, entering the values of attributes, defining the retention policy and confirming “Create”.

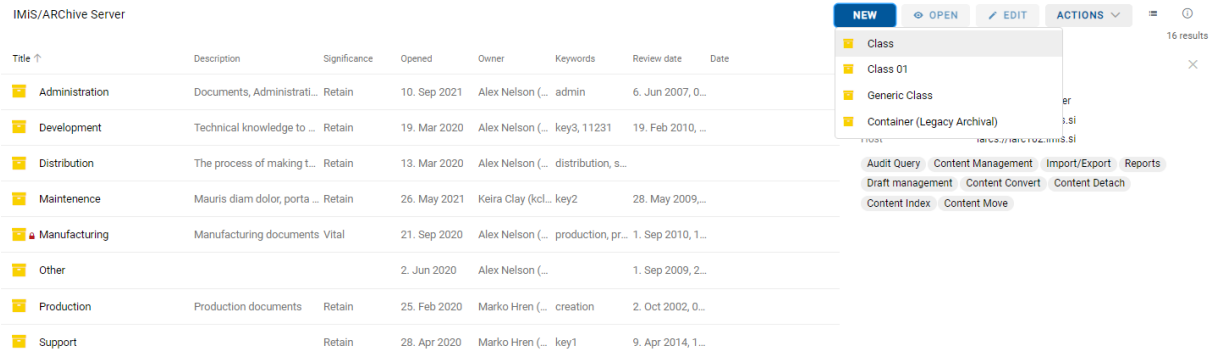


Image 96: Selecting a template from the list

Afterwards, the user selects or adds attribute values, defines the retention period, and in the end confirms this by clicking on "Create".

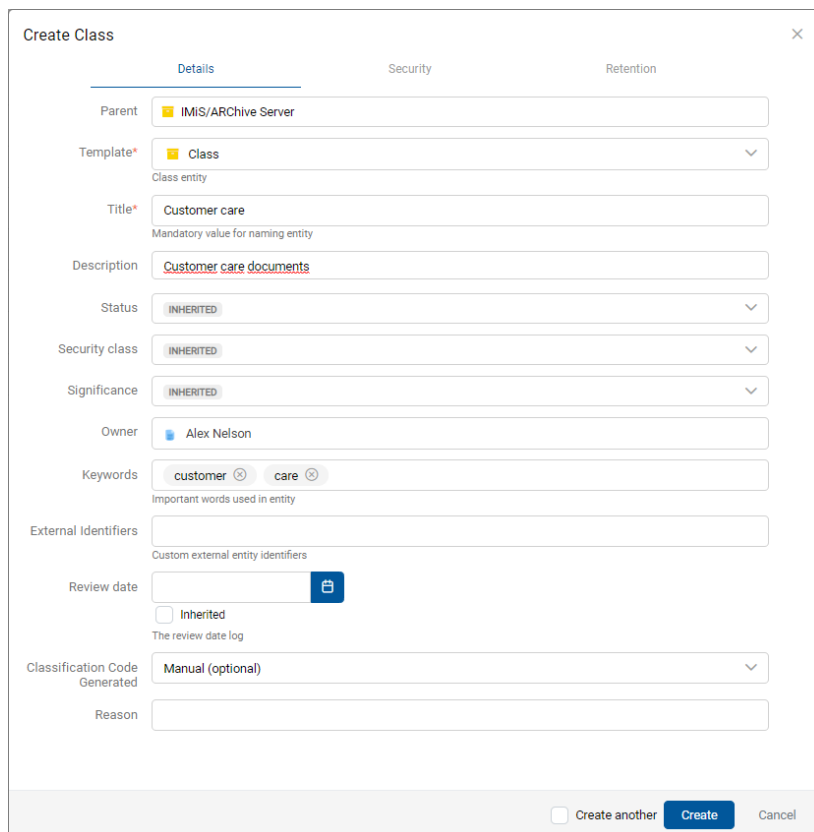


Image 97: Creating a root class

4.3.2.1.2 Creating subentity

In the classification scheme in the left view or in the entities list in the central view the user selects the entity into which he wants to classify a new class, folder or document.

The user does that by selecting the “New” command in the command bar and selecting the relevant template from the list, same as when creating a root class.

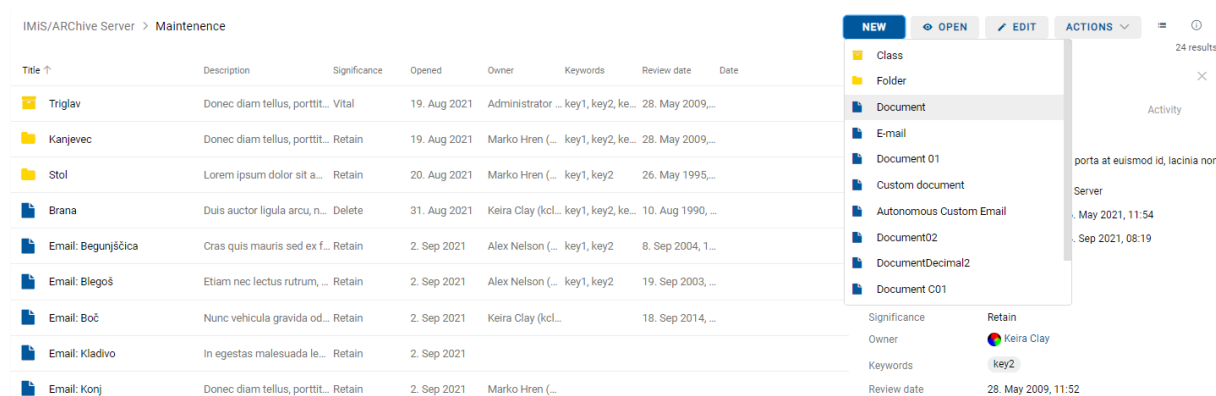


Image 98: Display of contained entities.

The user is shown a dialog box with the relevant tabs and set of attributes based on the selected template. In the Details tab the following attributes are available to the user:

- Parent: the name of the parent entity. This attribute is read-only.
- Template: a set of available templates for creating allowed entities and classifying them under the selected class or folder. The attribute value is mandatory.
- Title: name of the entity. The attribute value is mandatory.
- Classification code: the classification code of the created entity in the classification scheme.
- Description: short description of the entity.
- Status: the status of the entity.
- Security class: a set of available entity security classes based on the entity's position in the classification scheme.
- Significance: a set of available entity significances.
- Owner: a directory entity (user or group) entity that is responsible for the selected entity (owner).

***Note:** The user can search by the text entered in the search box and select a directory entity in the popup menu below the text. The search is performed if at least 2 characters have been entered. Only the directory entities matching the search criteria will be displayed (5 at the most). The user can select them using the keys ↑ and ↓ and confirm the selection by clicking on the selected entity in the popup menu below or by using the key Enter ↵.*

- **Keywords:** entity-related keywords. This attribute can have multiple values.
- **Categories:** the entity view mode.
- **Content:** document contents. This attribute is available only for document-type entities.
- **External identifiers:** a list of the unique external identifier of the entity on the server.
- **Classification code generated:** the type of classification code entry for the contained entities of the parent class.
- **Custom attributes:** additional custom attributes. The selection of attributes depends on the selected template.

The user can specify whether the value of the custom attribute is inherited from a parent entity. By checking the box of the custom attribute »Inherited« and saving the entity (Save), the value(s) is (are) transferred from the parent entity.

Image 99: Display of creating a new document

Troubleshooting: the most frequent issues when creating a new entity are:

- *Entity with the template you selected cannot be created inside the selected entity.*
- *User does not have permission to create new entities inside the selected entity.*

4.3.2.2 Entering entity metadata

The Details tab in the Create entity dialog box contains a list of all attributes of the class, folder or document, which can be entered by the user.

The order of attributes on the list is defined by the order of the template attributes.

The following can be edited in the web administration interface IMiS®/wAdmin.

For more information see chapter [The Template folder in the IMiS®/ARChive Server Manual](#).

Required attributes are marked with an asterisk and must be entered before saving.



The image shows a form field with the label 'Title*' on the left. The input field contains the text 'Invoices'. Below the input field, there is a small note that reads 'Mandatory value for naming entity'.

Image 100: Entry of required metadata

Attribute entry fields are as follows:

- Text field where the user inputs any string of characters.



The image shows a form field with the label 'Description' on the left. The input field contains the text 'Invoices, Letters, Notes, Related documents'.

Image 101: Entry of text metadata

- Date field where the user inputs the date or selects one from the date and time selection popup window.

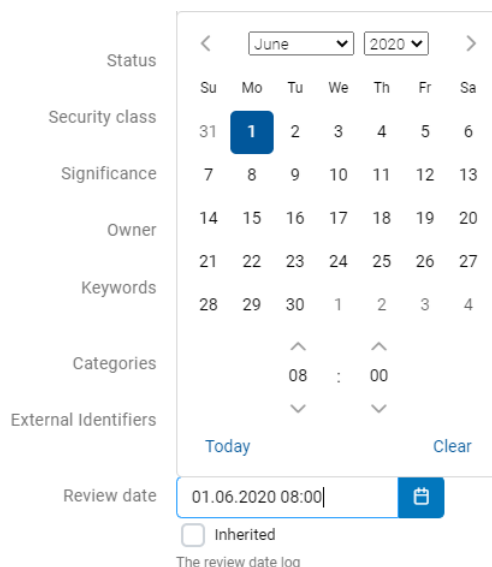


Image 102: Entry of date and time metadata

In the event of a contained entity, the user is shown the inherited value in the date field. By unchecking the default setting »Inherited«, the user can enter the date or select it from the popup window for setting the date and time.

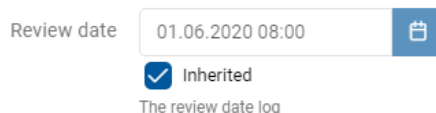


Image 103: Displaying the inherited value of the date field of the parent entity

Note: The user with permission can define the date and time format in the file [settings.json](#), which will be displayed in all the date fields. The settings are shown below.

Properties	Type	Description
calendar.date.format	String	The display format in the date selection field. <ul style="list-style-type: none"> • EN: dd/mm/yy • SI: dd/mm/yy
calendar.first_day_of_week	Number	The first day of the week in the date selection field (0=Sunday, 1=Monday, ... <ul style="list-style-type: none"> • EN: 1 • SI: 1

Properties	Type	Description
date_time_format	String	The date and time display format. Default value: MMM yyyy, HH:mm
date_format	String	The date display format. Default value: d.MMM.yyyy
time_format	String	The time display format. Default value:: HH:mm

Following options can be a part of the calendar.date_format:

- d* - day of month (no leading zero)
- dd* - day of month (two digit)
- o* - day of the year (no leading zeros)
- oo* - day of the year (three digit)
- D* - day name short
- DD* - day name long
- m* - month of year (no leading zero)
- mm* - month of year (two digit)
- M* - month name short
- MM* - month name long
- y* - year (two digit)
- yy* - year (four digit)
- @* - Unix timestamp (ms since 01/01/1970)
- !* - Windows ticks (100ns since 01/01/0001)
- '...'* - literal text
- "* - single quote

- A pick list with predefined values, one of which is selected by the user.

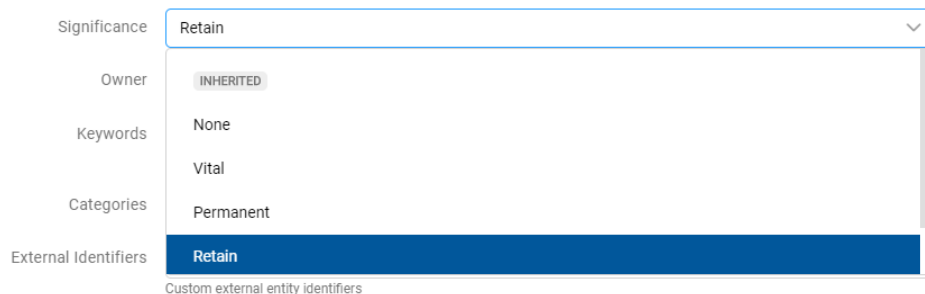


Image 104: Entry of metadata with predefined values

- A field for entering multiple desired text values, separated by using the Enter key. In the multiple value display field, the individual values are separated by spaces. The user has the option of removing individual keywords by clicking on the cross next to the word.

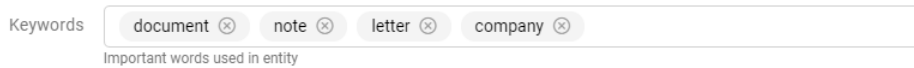


Image 105: Entry of multiple values into a field

- A field for selecting multiple values of an attribute. This feature is supported in the following types of attributes: Binary, Boolean, Decimal, Double, Int, Date, Date time, Time and Picklist. For each attribute, the user has the option of adding values with the icon “ + ” or removing them with the icon “ - ”.

Image 106: Entering multiple values of an attribute

- A field for selecting multiple values of a directory entity. This feature is supported in the attribute type Directory entity. By entering the text value into the field, the user limits the set of the searched directory entities. For each directory entity, the user has the option of adding with the icon » + « or removing with the icon » - «.

The screenshot shows a 'Create Document' dialog box with a 'DETAILS' tab selected. The dialog has a close button (X) in the top right corner. The 'EDITORS' section contains five entries: Alex Nelson, Jerry Turner, John Smith, Keira Clay, and Marco Welch, each with a minus sign (-) or plus sign (+) to its right. Below this is a sub-section titled 'List of directory entities which can modify the entity' containing four entries: PDF #1.PDF, PDF #2.PDF, PDF #3.PDF, and PDF #4.PDF, each with a minus sign (-) or plus sign (+). The 'bool' section has a checkbox and minus/plus signs. The 'double', 'attr.label', 'time', 'attr:uint64', and 'Reason' sections each have a text input field and a plus sign (+). At the bottom right, there are 'CREATE' and 'CANCEL' buttons.

Image 107: Entering the values of multiple directory entities

After entering all of the required and desired attribute values in the Details tab, the user continues by entering the values in the remaining tabs.

4.3.2.3 Entry of the classification code

The entry of the classification code for new entities depends on the selected type of classification code generation of the parent class or folder.

In the preview or open mode, the information about the classification code of an existing entity is in the Details tab in the set More.

In the editing mode, the drop-down list of the field Child classification code generation allows the user to set the entry type for the selected class or folder:

- Automatic: Entity numbering is automatic. The classification code of child entity is generated automatically by the IMiS®/ARChive Server. These classification codes appear as successive numbers, with each new child entity increasing the number by one.
- Manual: Entity numbering is manual. The classification code of child class or folder entity must be entered manually by the user. This classification code may be any combination of letters and numbers, providing it is unique inside the entire parent class.
- »Manual (Optional)«: Entity numbering is flexible.

If the user manually sets the classification code, the server first checks whether the code is duplicate. If it is, it rejects it with an error. If the user does not manually set the classification code, the server assigns it automatically.

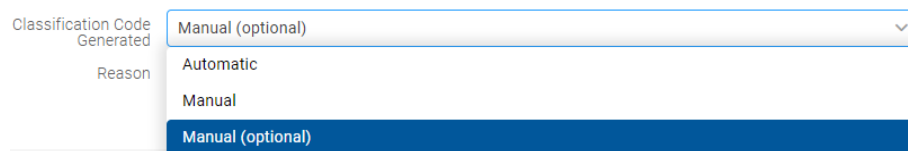


Image 108: Selecting the type of classification code entry for the contained entity

In the event of a manual entry of the classification code, the user only enters the relative (own) part of the classification code, and the full classification code is then created from the parent entity's own classification code and the code input by the user.

Example: (see below) Inside a class with the classification code 03.04, the user creates a new folder for which user manually input IS-EXP-1000 as the relative part of the classification code. When the folder is saved to the IMiS®/ARChive Server, its full classification code will be 03.04.IS-EXP-1000.

Image 109: Manual entry of a child entity's classification code

IMiS/ARChive Server > Administration

Title ↓	Classification Code	Creator	Owner
Export	3/IS-EXP-2000	Administrator (admin)	Alex Nelson (anelson)

Image 110: Display of manually entered classification code

4.3.2.4 Setting an entity's security class

This setting hides entities from users whose security class level is not high enough to access them. The user with the Create entities permission can specify a new Security class for new entities in the Details tab in the Create entity dialog box.

Image 111: Specifying the security class of a new entity

Security classes are predefined, and range from lowest to highest as follows:

- **Inherited:** The security class is implicitly inherited from the parent entity. In case of root classes, the inherited security class value is empty.
- **Unspecified:** Access to this entity is not specified.
- **Restricted:** The entity is an internal matter. It may only be accessed by users with a clearance level Restricted or higher.
- **Confidential:** The entity is considered confidential. It may only be accessed by users with a clearance level Confidential or higher.
- **Secret:** The entity is considered secret. It may only be accessed by users with a clearance level Secret or higher.
- **Top Secret:** The entity is considered top secret. It may only be accessed by users with a Top Secret clearance level.

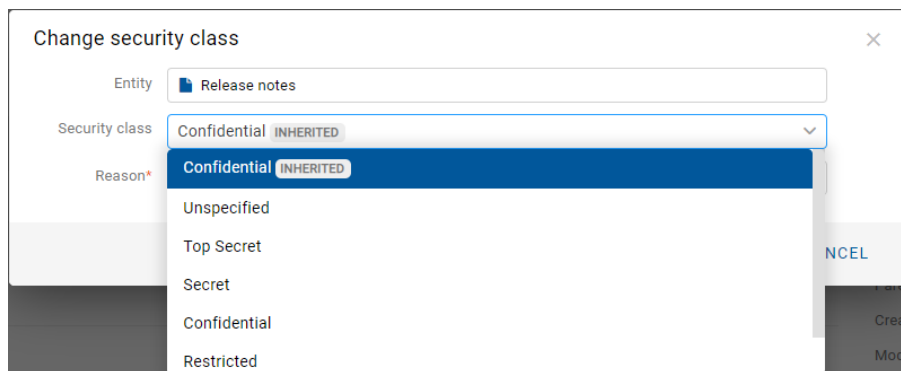


Image 112: Entity information after entering the security class

4.3.2.5 Entering the status of an entity

The user with the Create entities permission can specify the Status of new entities in the Details tab in the Create entity dialog box.

The user can choose from predefined values for the status of an entity:

- **Inherited:** the status of the entity is implicitly inherited from the parent entity. In the case of root classes, it matches the status Opened.
- **Opened:** the status of the entity changes explicitly to Opened.
- **Closed:** the status of the entity changes explicitly to Closed.

The screenshot shows the 'Create Document' dialog box with the 'DETAILS' tab selected. The 'Status' dropdown menu is open, showing 'Opened' and 'Closed' options. The 'Opened' option is selected. Other fields include Parent (wClient project), Template (Document), Title (Development strategy), Description (Total transformation through a right-the-time approach), Security class (Opened), Significance (Opened), Owner (Alex Nelson), Keywords (development, strategy), Categories (development), and Content (Drag and drop files or click). The 'CREATE' and 'CANCEL' buttons are visible at the bottom right.

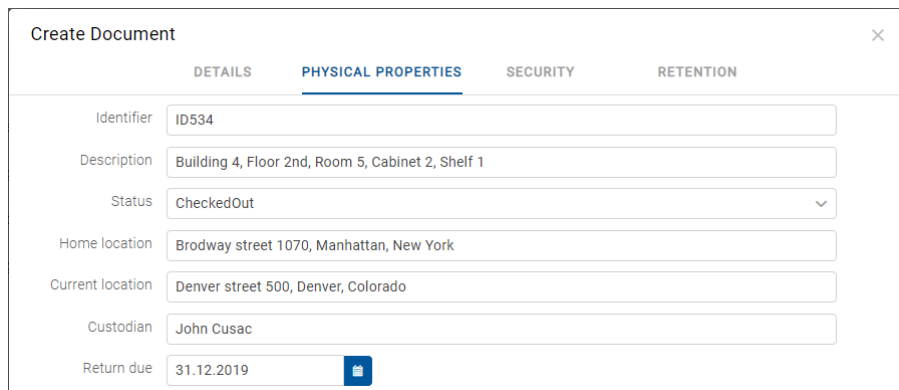
Image 113: Specifying the status of a new entity

4.3.2.6 Entry of physical content metadata

In the case of a document- or folder-type entity, information about the physical content is also available to the user in addition to the above-mentioned information when in open or edit mode.

When capturing physical content into its electronic form, users may add metadata that describes the physical location of the stored content, in addition to other types of metadata. The location metadata is optional. Entry of physical content metadata is possible upon capture/import, or later when the content is already stored in electronic form.

By selecting the Physical Content tab in the editing mode, a list of attributes, referring to the description of physical content, appears.



The screenshot shows a 'Create Document' window with a close button (X) in the top right corner. The window has four tabs: 'DETAILS', 'PHYSICAL PROPERTIES' (which is selected and underlined), 'SECURITY', and 'RETENTION'. The 'PHYSICAL PROPERTIES' tab contains the following fields:

- Identifier: ID534
- Description: Building 4, Floor 2nd, Room 5, Cabinet 2, Shelf 1
- Status: CheckedOut (with a dropdown arrow)
- Home location: Brodway street 1070, Manhattan, New York
- Current location: Denver street 500, Denver, Colorado
- Custodian: John Cusac
- Return due: 31.12.2019 (with a calendar icon)

Image 114: Display of the entry of physical content metadata

The user can specify all of the attribute values except for Date of status change, which is automatically filled in with the date of the last change of the Status attribute.

When capturing physical content, set the Status to the Checked-In value.

For more information on physical content attribute description see chapter [Physical content attributes](#).



The screenshot shows a 'Status' dropdown menu with 'CheckedOut' selected. Below the dropdown, the text 'Status change 19. Sep 2019, 09:06' is displayed.

Image 115: The date of the last change of the Status attribute

4.3.2.7 Specifying retention periods

A condition for successfully saving new entities is the existence of effective retention periods on the entity. This condition applies to all types of entities, except for documents in a folder for which retention periods cannot be specified.

Only a user with the Change retention permission can add retention and disposition hold periods. The user adds retention and disposition hold periods by selecting the command Add in the top part of the view.

For each retention period the user specifies the validity and type of entity to which it refers:

- **Classes:** the retention period is valid for all classes under and including the selected entity.
- **Folders:** the retention period is valid for all folders under and including the selected entity.
- **Documents:** the retention period is valid for all documents under the selected entity.

The retention period can be valid for or not valid for a specific type of entity.

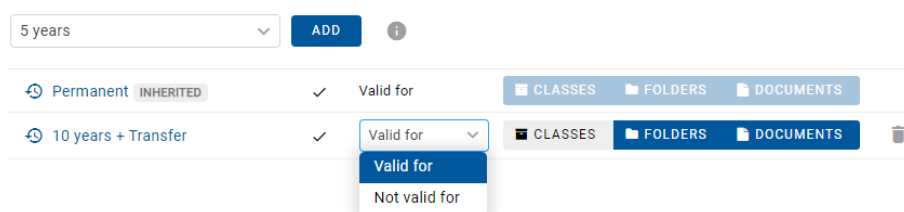


Image 116: Selecting validity for a specific type of entity

After creating an entity, the effective retention periods are ticked in front of the information about the validity of individual types of entities.

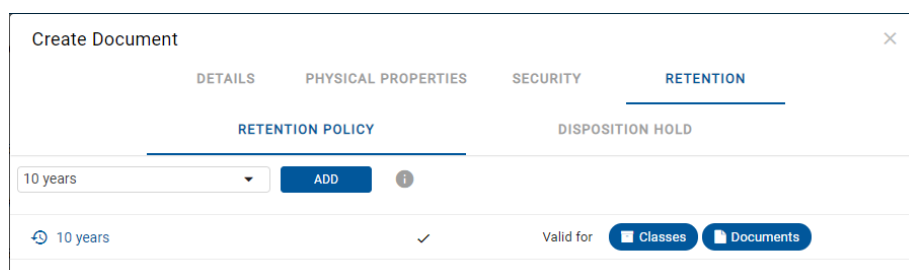


Image 117: Display of the »Retention« tab

4.3.2.8 Saving an entity

Before saving an entity, the user has to enter all of the mandatory metadata and specify an effective retention period. The user saves the entity to the IMiS®/ARCHIVE Server by selecting the Create command in the bottom part of the dialog window.

Image 118: Saving a new or modified entity

After saving, an entity created notification appears. By selecting the title of the entity in the notification, the entity is opened in reading mode.

Title ↑	Description	Significance	Opened	Owner	Keywords	Review date	Date
Fusce varius	Etiam nec lectus rutrum, ...	Retain	25. Aug 2...	Administr...	key4	14. Jun 1...	
Nullam mauris nisi		Retain	25. Aug 2...	Alex Nels...		14. Jun 1...	
45		Retain	13. Sep 2...				
883	Mauris diam dolor, porta ...	Retain	30. Aug 2...	Alex Nels...	key2, key...	25. Sep 2... 30. Aug 2...	
Nullam mauris	Nullam mauris nisi, hend...	Retain	19. Sep 2...	Alex Nels...	hendrerit	15. May 2...	

Image 119: Notification about saving the created entity

Troubleshooting:

Most frequent errors when saving:

- *The value of a mandatory attribute was not specified.*
- *The entered attribute value does not correspond to the limitations prescribed by the attribute.*

When saving an entity to the IMiS®/ARChive Server, the following metadata is automatically recorded into the entity:

- **Classification code:** according to the classification of the entity in the classification scheme, the server creates a unique string of characters.

Classification Code 13/IS-EXP-500

Image 120: Example classification code

- **Creator:** the user who created the entity; meaning the user who was logged in during the session when the entity was created. This metadata never changes.

Owner  Ron Salazar

Image 121: Example creator of entity

- **Created:** records the date and time the entity was created on the server. This metadata never changes.

Created  Keira Clay 27. Sep 2018, 14:49

Image 122: Example date and time an entity was created

- **Modified:** records the date and time of the last change to any of the attributes or the content of the entity. This metadata changes every time the entity is saved.

Modified 27. Sep 2018, 14:49

Image 123: Example date and time of last changes to the entity

- **Accessed:** records the date and time the entity was last opened in the reading mode or the editing mode. This metadata changes whenever a user accesses or edits the entity.

Accessed 27. Sep 2018, 14:49

Image 124: Example date and time of last access to the entity

- **Opened:** records the date and time the Status attribute was saved with the Opened value.

Opened 27. Sep 2018, 14:49

Image 125: Example date and time an entity was opened

- **Closed:** records the date and time the Status attribute was saved with the Closed value.

Closed 27. Sep 2018, 15:01

Image 126: Example date and time an entity was closed

- **Identifier:** the entity's unique identifier on the server. This metadata never changes.

Identifier Jjgoyu4LBNJkT0HSu9aMalwQt-IVluzH

Image 127: Example entity identifier

4.3.3 Editing entity data

Changing data about an entity in the IMiS®/wClient includes editing metadata and modifying content. A user can only change entity data when user have the Write permission on the entity. To edit the selected entity, use the Edit command in the command bar.

The user edits the selected entity using the Edit command in the command bar.

A dialog box opens with the attributes and their values.

The value can be text, date, logical or one of the predefined values, which may be multiple.

4.3.3.1 Editing entity metadata

In the Details tab the user can edit the attribute values.

The selection of attributes is defined by the selected template.

For more information on the set of editing metadata see chapter [Creating subentity](#).

4.3.3.2 Editing content

In the Details tab the user edits document contents.

For more information on editing contents see chapter [Content management](#).

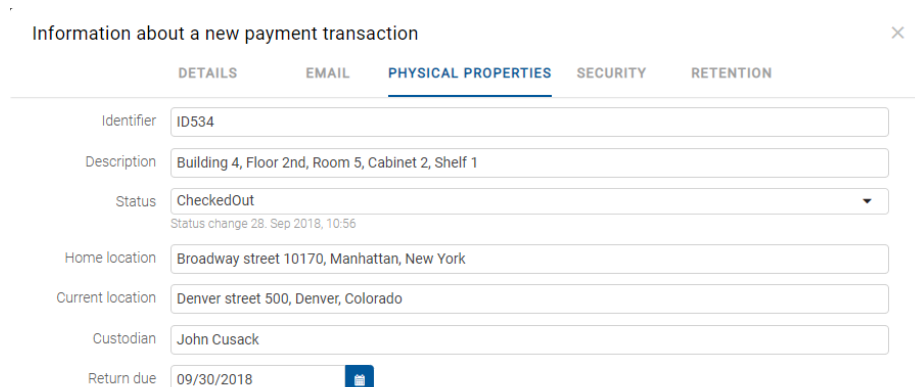
4.3.3.3 Editing physical content metadata

In the Physical Content tab the user edits the metadata referring to the location of the physical content. The metadata are not mandatory for archiving physical content.

Physical content metadata can be entered for a folder or document. For more information on editing physical content metadata see chapter [Physical content attributes](#).

The user can edit the following values of physical content attributes:

- Identifier: unique identifier of the physical content.
- Description: description of the physical content.
- Status: the current status of the physical content.
- Home location: the home location of the document's physical content.
- Current location: the current location of the document's physical content.
- Return due: return date and time of checked out physical content.



Information about a new payment transaction

DETAILS EMAIL **PHYSICAL PROPERTIES** SECURITY RETENTION

Identifier ID534

Description Building 4, Floor 2nd, Room 5, Cabinet 2, Shelf 1

Status CheckedOut
Status change 28. Sep 2018, 10:56

Home location Broadway street 10170, Manhattan, New York

Current location Denver street 500, Denver, Colorado

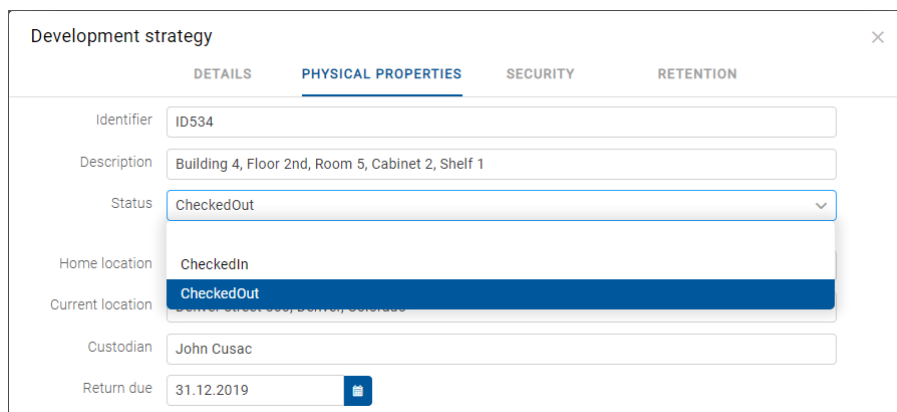
Custodian John Cusack

Return due 09/30/2018

Image 128: Editing of the physical content metadata

By changing the value of the Status attribute and saving the entity, the Status Change is written below the value field. Status Change is automatically filled in with the date of the last change of the Status field.

The user can change the value of the Status attribute to CheckedIn when checking in physical content or to CheckedOut when checking out physical content.



The screenshot shows a web form titled "Development strategy" with a close button (X) in the top right corner. The form has four tabs: "DETAILS", "PHYSICAL PROPERTIES" (which is active), "SECURITY", and "RETENTION". The fields are as follows:

- Identifier: ID534
- Description: Building 4, Floor 2nd, Room 5, Cabinet 2, Shelf 1
- Status: CheckedOut (dropdown menu is open, showing "CheckedIn" and "CheckedOut" options)
- Home location: CheckedIn
- Current location: CheckedOut
- Custodian: John Cusac
- Return due: 31.12.2019 (with a calendar icon)

Image 129: Popup menu for selecting the status of the physical content

4.3.3.4 Editing access rights

The user with the Change permissions permission can edit the access control list (ACL) for the entity or a selected metadata for a directory entity (user, group, attribute of directory entity type). The list shows only those directory entities that have been granted at least one explicit permission on the selected entity.

The Permissions field is located above the list of editing permissions. The default value is Entity, with which the access control list (ACL) is associated.

4.3.3.4.1 Editing access rights for an entity

By selecting the Edit button in the command bar, a dialog box opens showing effective permissions on the entity for the selected directory entity or the given directory entity contained in the mentioned attribute of the directory entity type.

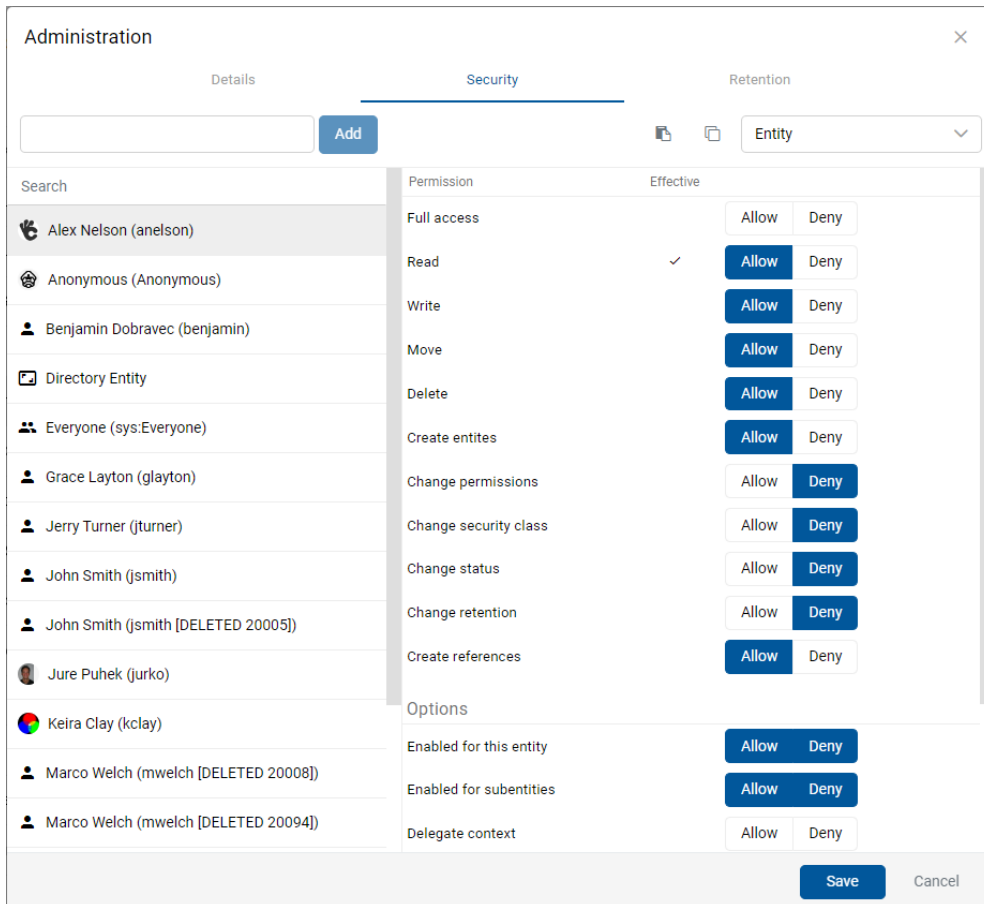


Image 130: Security tab in editing mode

The left part of the view contains a list of directory entities with access rights to the entity. In the event of a greater number of directory entities, search is enabled via a search box.

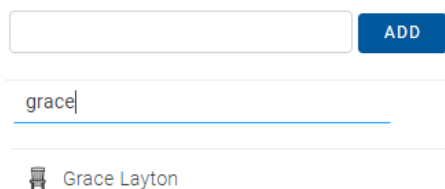


Image 131: Searching a directory entity on a list

If a specific group, user or an attribute of directory entity type, that is registered on the IMiS®/ARChive Server is not mentioned on the list, the user with permission can select and add them using the Add button.

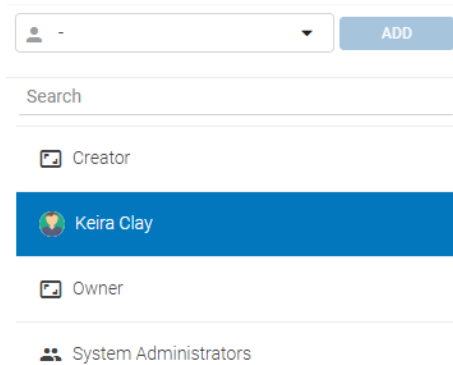



Image 132: List of directory entities with access rights to the entity

In the right part of the view a list of entity editing permissions is shown in the section Permissions, for the selected directory entity or an attribute of directory entity type.

The Effective column shows the current state of effective permissions for the selected group or user over the entity.

To the right of the column Effective permissions, the user selects Allow to add an explicit permission, or Deny to revoke a permission. The user can specify explicit permissions for any registered directory entity or an attribute of directory entity type.

By selecting the icon  in edit mode, the user can copy all the explicit permissions of all the users on the entity.

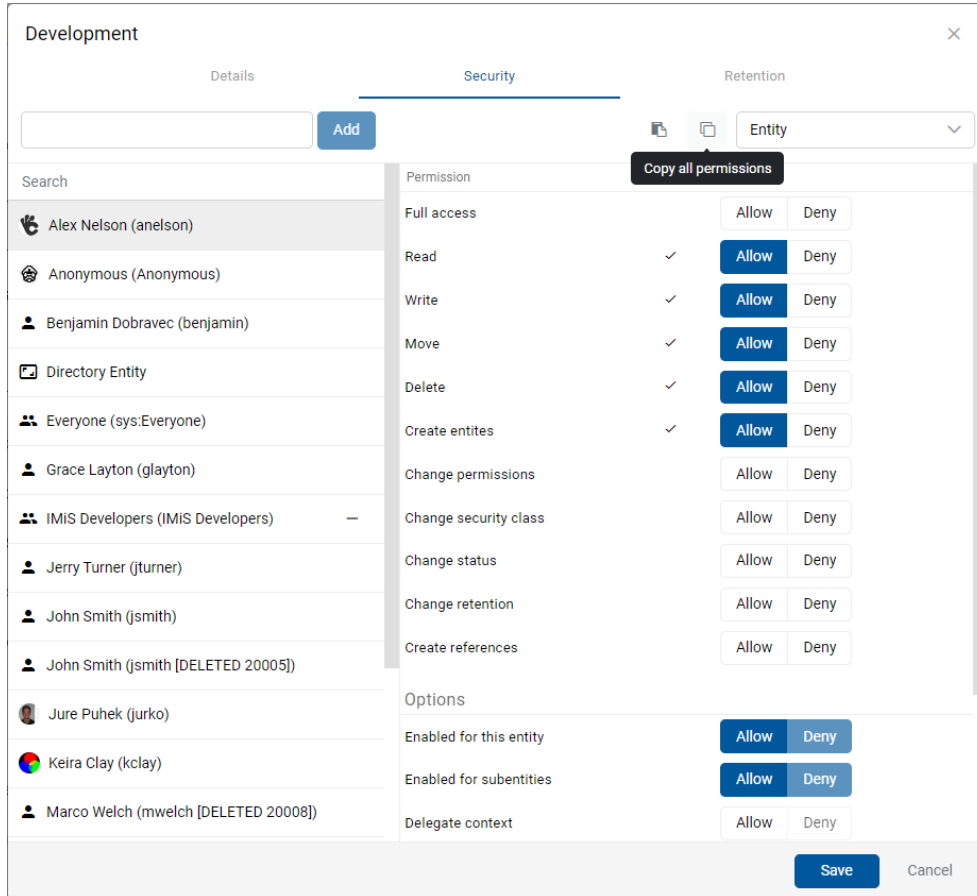



Image 133: Copying access permission settings

By selecting the icon , the user pastes all the copied access permissions for all users to the selected directory entity.

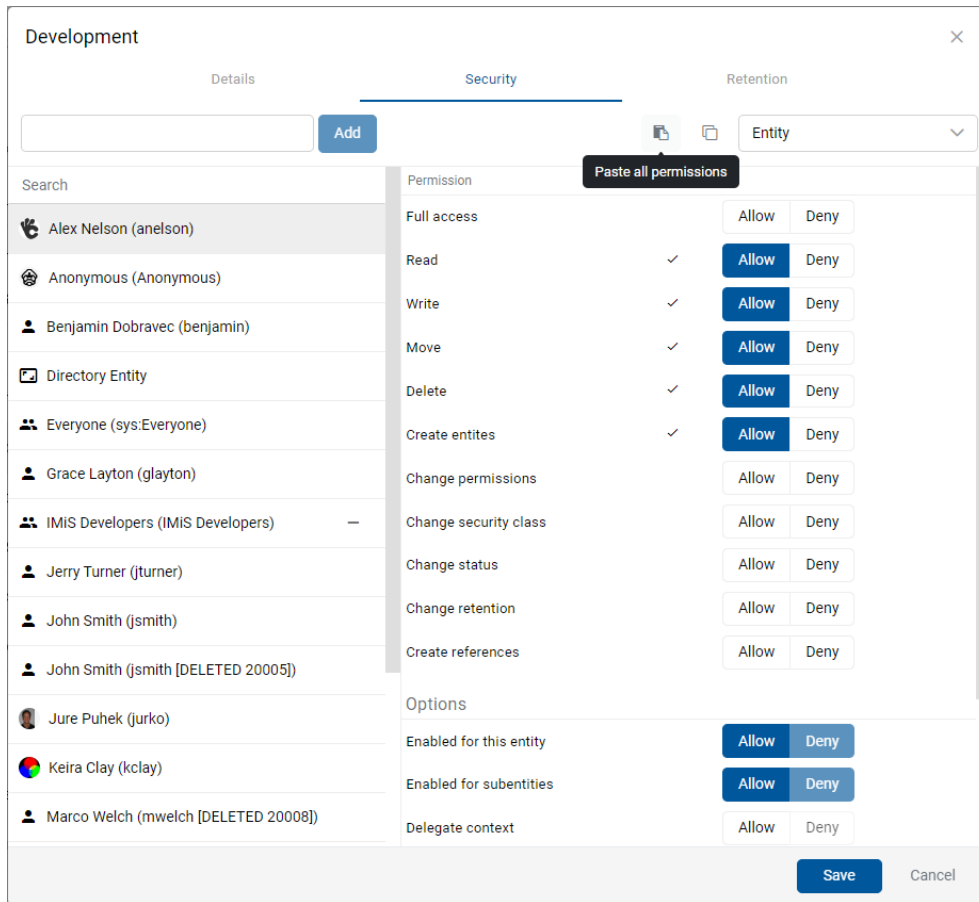
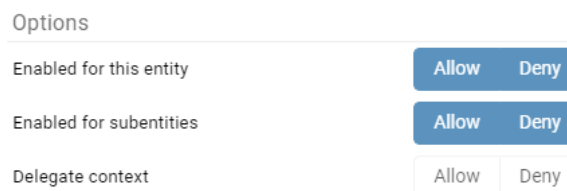


Image 134: Dropping access permissions

In the section Options with a tick the user enables the options for access permissions in the context of Allow or Deny:

- Enabled for this entity: the permissions are enabled on the current entity.
- Enabled for subentities: enables the inheritance of permissions on contained entities.
- Delegate context: the access permissions apply to the user who will log in on behalf of a delegated user.

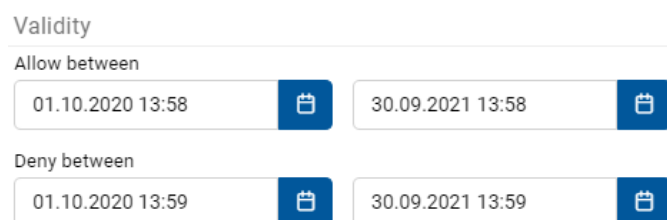


Options	
Enabled for this entity	Allow Deny
Enabled for subentities	Allow Deny
Delegate context	Allow Deny

Image 135: Setting the inheritance of access permissions to contained entities

In the section Validity the user sets a time limit on the validity of entity access permissions for the selected directory entity or for the given directory entity contained in the mentioned attribute of the directory entity type. The user does so by setting the temporal validity of access permissions (Valid from and Valid to) in the date field.

For more information on the date and time format that will be shown in the date fields, see chapter [Entering entity metadata](#).



Validity	
Allow between	
01.10.2020 13:58	30.09.2021 13:58
Deny between	
01.10.2020 13:59	30.09.2021 13:59

Image 136: Setting the temporal validity of access permissions

In the case of the directory entity type attributes, the permission is effective for the respective value in the mentioned attribute in the context of the entity in question. Therefore, a permission does not have the same effect on all child entities, but rather sets the permission for all users and/or user groups mentioned in the value of the attribute to which the access permission refers. Permissions have no effect on system directory entities.

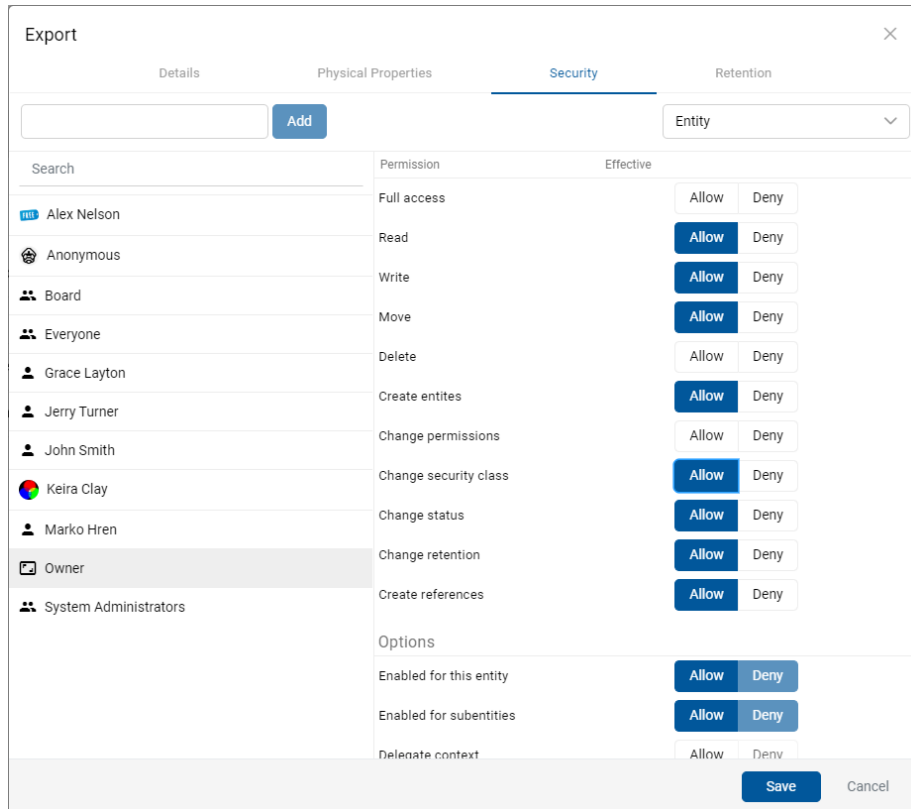


Image 137: A list of access permissions for a specific attribute

4.3.3.4.2 Editing access rights for metadata

The Permissions field is located above the list of editing permissions.

Instead of the Entity default value, the user can select one of the metadata with which the access control list (ACL) is associated.

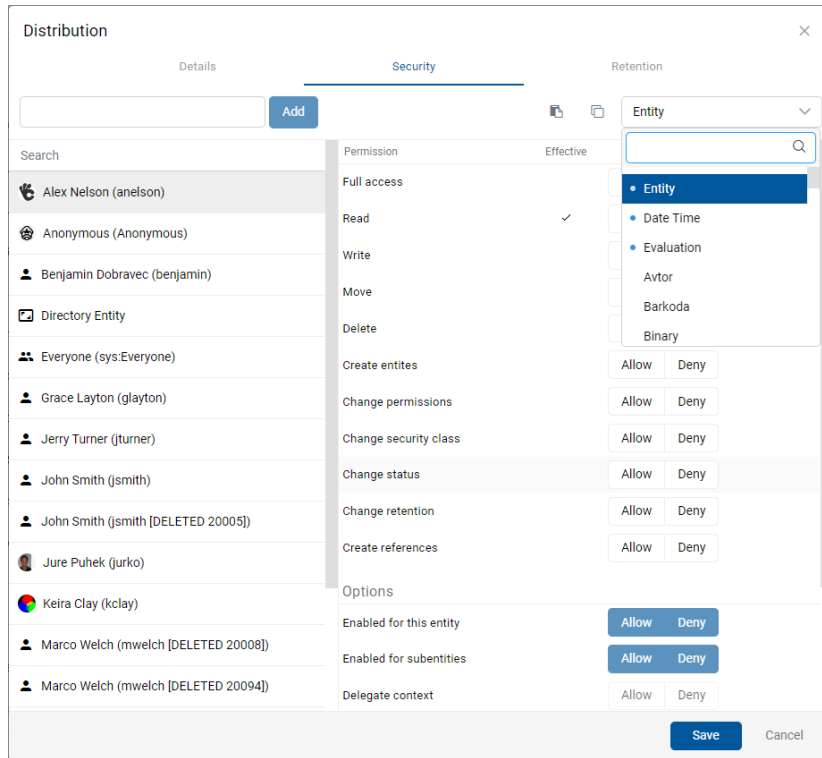


Image 138: Popup menu for selecting access rights to a selected metadata

Note: The selected metadata for which access permissions have been defined are marked in the menu with a blue dot in front of the title. They are sorted in alphabetical order.

The left part of the view contains a list of users with access rights to the selected metadata. User selects a directory entity to which it wants to grant access rights. In the event of a greater number of directory entities, search is enabled via a search box. The user adds it to the list using the Add button.

In the right part of the view a list of metadata editing permissions is shown for the selected directory entity.

To the right of the column Effective permissions, the user selects Allow to add an explicit permission, or Deny to revoke a permission.

In the section Options with a tick the user enables the options for access permissions in the context of Allow or Deny:

- Enabled for this entity: the permissions are enabled on the current entity.
- Enabled for subentities: enables the inheritance of permissions on contained entities.
- Delegate context: the access permissions apply to the user who will log in on behalf of a delegated user.

In the section Validity the user sets a time limit on the validity of metadata access permissions for the selected directory entity or for the given directory entity contained in the mentioned attribute of the directory entity type. The user does so by setting the temporal validity of access permissions (Valid from and Valid to) in the date field.

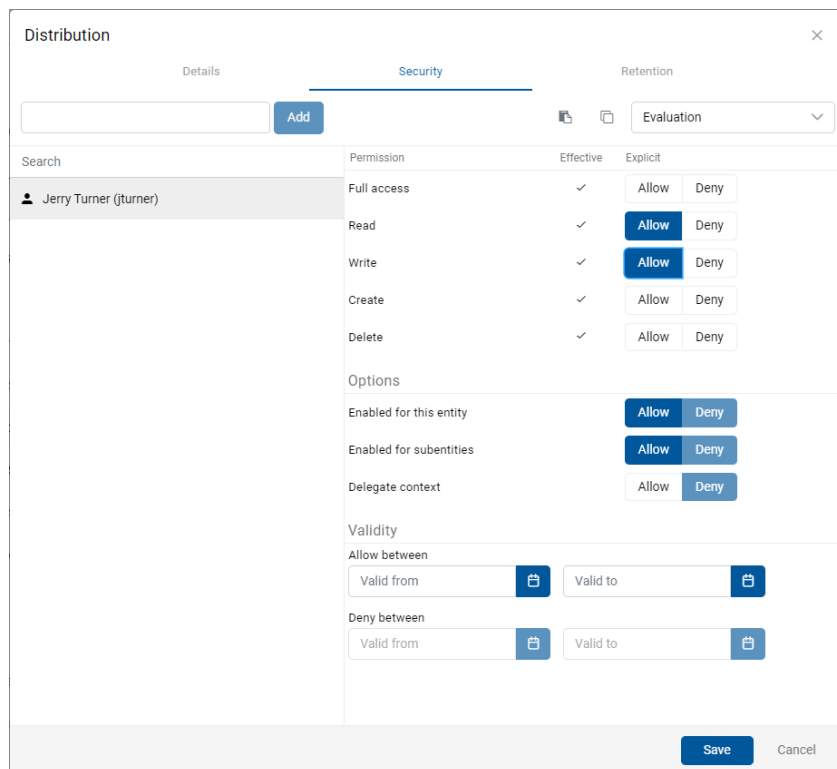


Image 139: List of user permissions on the selected metadata

The list of user permissions on the selected metadata of the entity consists of the following access rights:

- Read: the user has permission to read the value of the selected metadata of the entity.
- Write: the user has permission to edit the value of the selected metadata of the entity.
- Create: the user has permission to create the value of the selected metadata of the entity.
- Delete: the user has permission to delete the value of the selected metadata of the entity.

The user confirms the changes to the explicit permissions with the Save command or cancels them with the Cancel button.

4.3.3.5 Editing retention policies

The user with the Change retention permission can edit the retention periods and disposition holds of the selected entity by selecting the Edit command.

A new window opens containing the tabs:

- Retention policy: entity retention policy list.
- Disposition hold: entity disposition hold list.

In the central view of the contained Retention policy tab is a list of retention periods for the selected entity. The user can edit only the explicit retention periods.

The inherited retention periods cannot be edited.

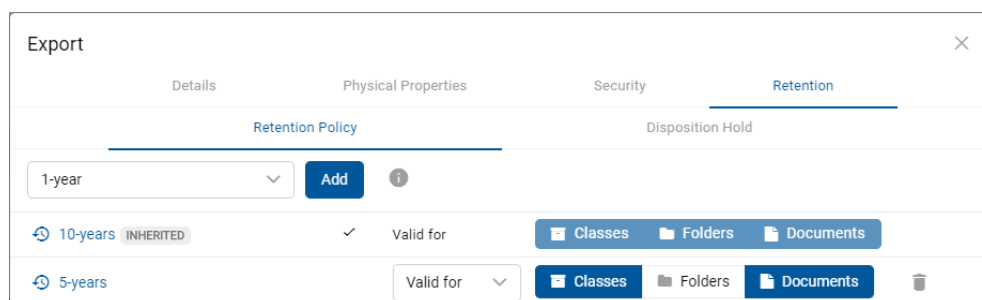



Image 140: The Retention policy tab in editing mode

The user can remove explicit retention periods from the list by clicking on the icon  at the end of the record of an individual retention period.

The user confirms the changes to the retention periods with the Save command or cancels them by selecting the Cancel command.

In the central view of the contained Disposition hold tab is a list of disposition holds for the selected entity.

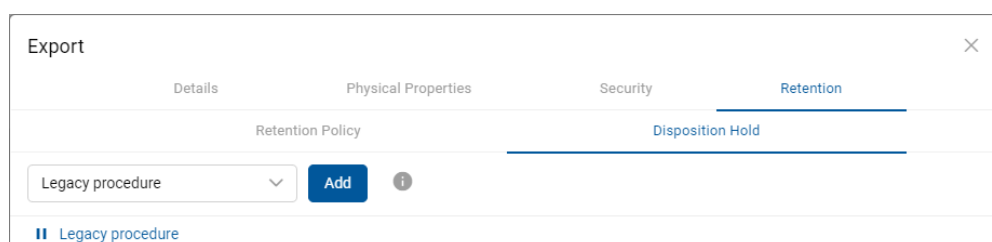



Image 141: The Disposition hold tab in editing mode

If the disposition hold is not given on the list, the user can select and add it using the Add button in the top part of the view.

The user can remove disposition holds from the list by clicking on the icon  at the end of the record of an individual disposition hold.

The user confirms the changes to the disposition holds with the Save command or cancels them by selecting the Cancel command.

4.3.3.6 Changing the classification code of an entity

The user can change the relative entity classification code even after assigning the classification code on entity creation. The classification code can be changed only on entities where the classification code of their parent entity has been set to “Manual” or “Optional”. For more information on setting the parent classification code see chapter [Entry of the classification code](#).

For changing the classification code of an entity, the user has to have the Change entity permission on the entity. The user can change the current classification code on existing entities by selecting the Actions command in the command bar and the Classification code action in the popup menu.

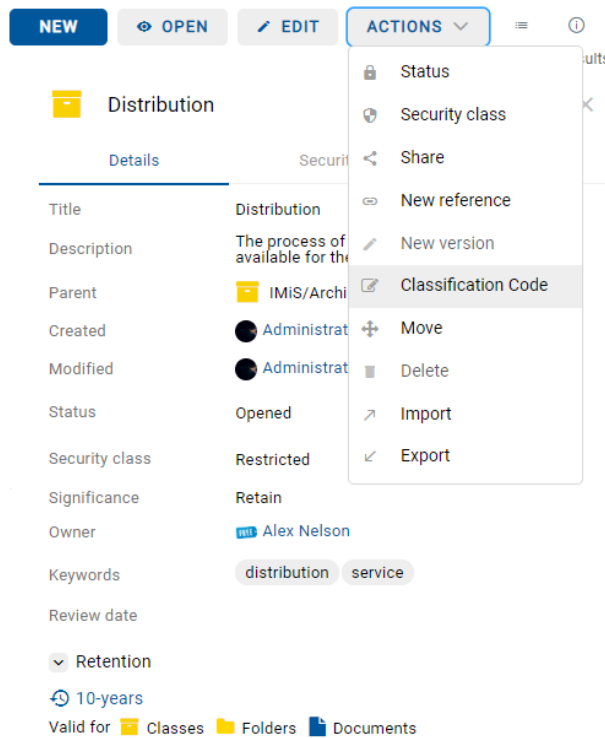


Image 142: Selecting the classification code

In the Change classification code dialog box in the Classification code field the user enters the new relative entity classification code.

The user writes a reason for the classification code change in the Reason to change field. The change of classification code for the selected entity is confirmed using the Save button.

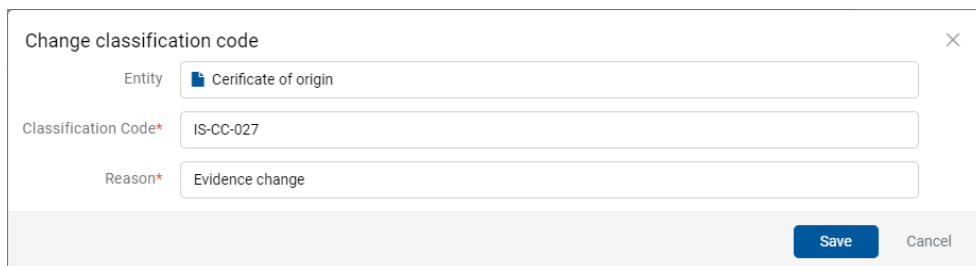


Image 143: Selecting the classification code and giving the reason for the change

4.3.3.7 Changing the status of an entity

For changing the status of an entity, the user has to have the Change status permission on the entity. The user can change the current status on existing entities by selecting the Actions command in the command bar and the Status action in the popup menu.

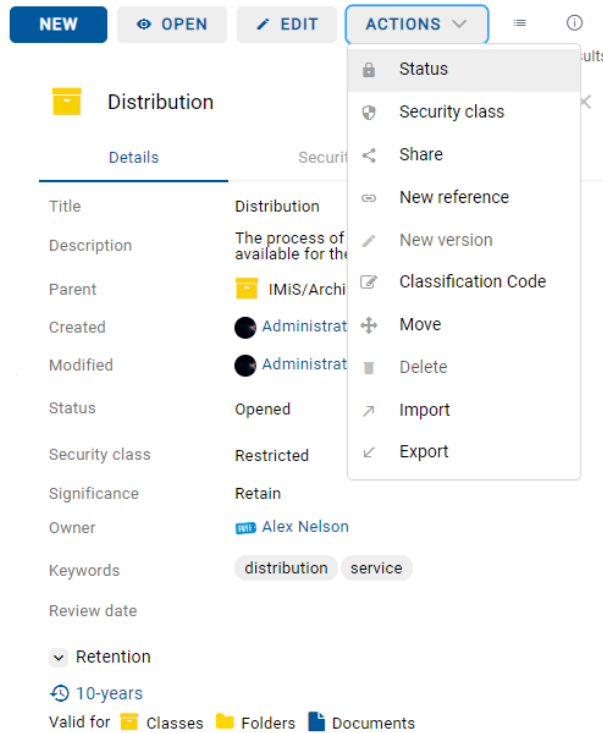


Image 144: The popup menu for selecting the Status command

In the Change status dialog box in the Status field the user selects the desired status from the drop-down menu.

For more information on the set of predefined values for the entity's status see chapter [Entering the status of an entity](#).

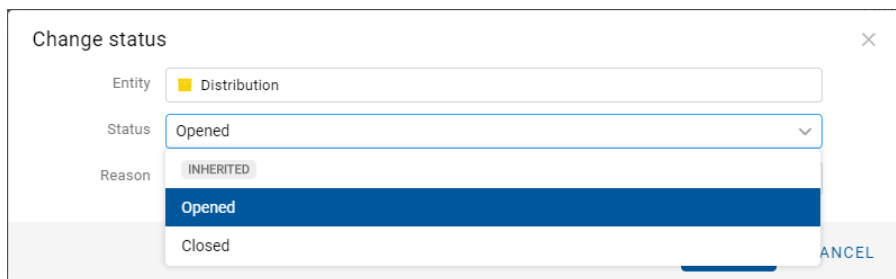


Image 145: Selecting the status

The user writes a reason for the status change in the Reason to change field.

The change of status for the selected entity is confirmed using the Save button.

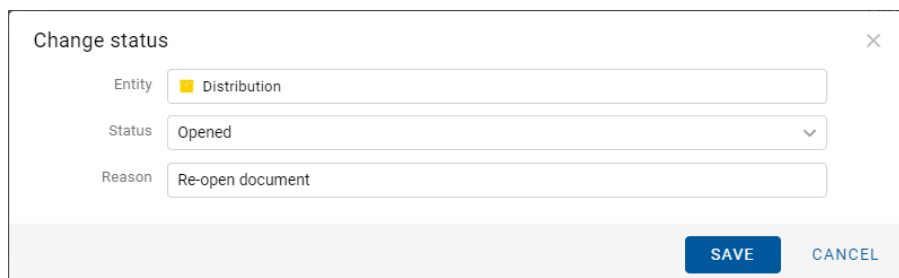


Image 146: Selecting the status and giving the reason for the change

4.3.3.8 Changing the security class

To change an entity's security class, the user must have the Change security class access right on the entity.

The user can change the current security class on existing entities by selecting the Actions command in the command bar and Security class in the popup menu.

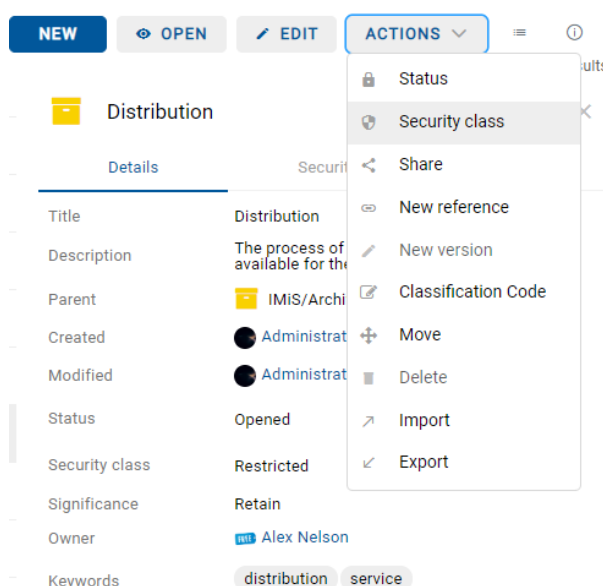


Image 147: The popup menu for selecting the Security class command

In the Change security class dialog box in the Security class field the user selects the desired security class from the drop-down menu.

For more information on the set of predefined values for the entity's security class see chapter [Setting an entity's security class](#).

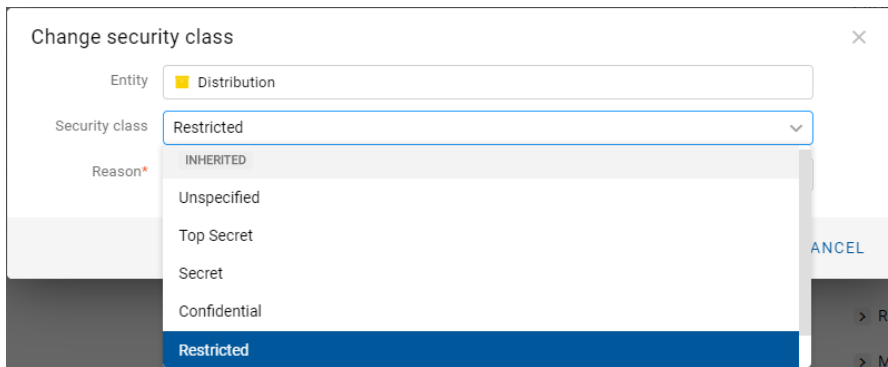


Image 148: Selecting the security class

The user enters the reason for the change of security class into the Reason to change field. The change is confirmed by clicking the Save button.

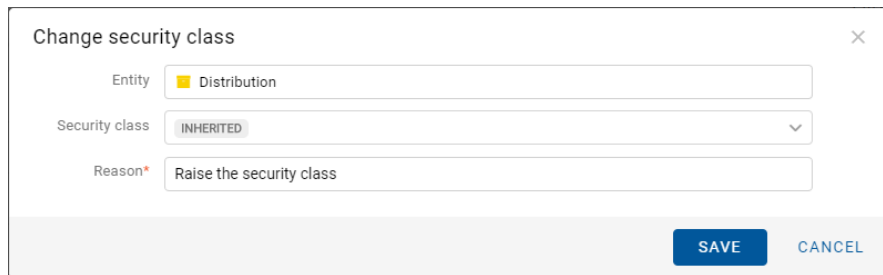


Image 149: Selecting the security class and giving the reason for the change

4.3.3.9 Sharing an entity

An entity can be shared by a user with the Read permission.

The user creates a copy of the link to the entity and saves it to the clipboard.

In open mode, the user selects the entity. By selecting the popup menu on the marked entity, the user selects the command Share.

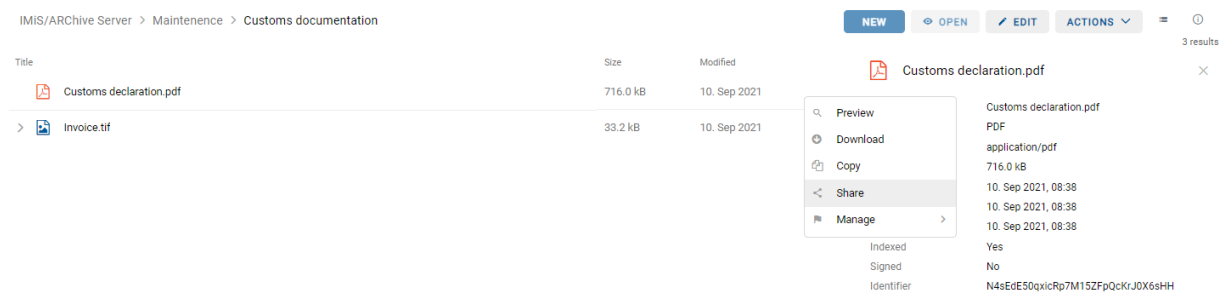


Image 150: Selecting the command Share in the popup menu

A dialog box opens containing the created link to the selected entity or content.

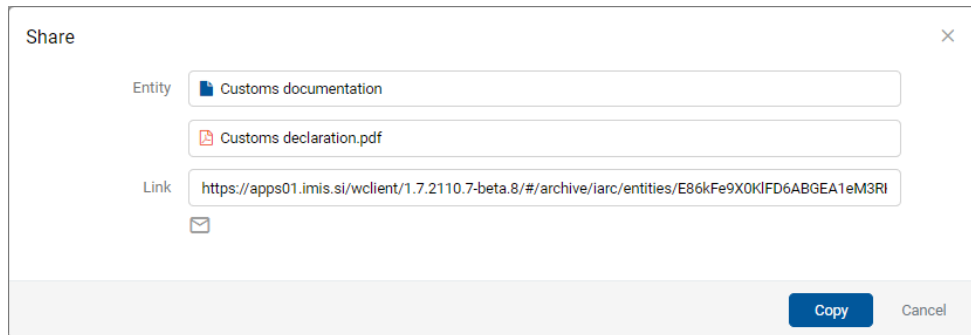


Image 151: Displaying the created link to the selected entity

By clicking on the field, the user can select the full text of the displayed link. Selecting the email icon opens a window for a new email message in the default application. The button Copy copies the link the same as using a right click and Copy over highlighted text or Ctrl+C over highlighted text.

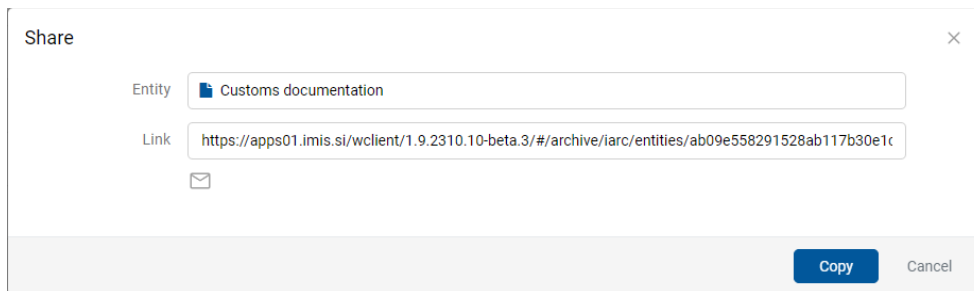



Image 152: Copying the link to the selected entity

By confirming the action Copy, the link to the entity is copied to the clipboard.



Image 153: Notification of copying a link to the clipboard

By selecting the icon , the user is shown the email content in the default messaging client with a link to the entity/content.

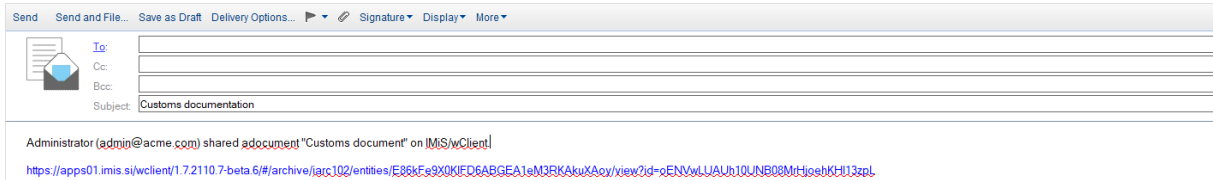


Image 154: Sending a link to the selected entity/content by email

By clicking the link, the email recipient is shown a login window of the IMiS®/wClient. After login, the user is shown the selected entity/content in the preview mode.

4.3.3.10 Adding and editing references

References enable a user to establish connections between entities and instantly move to other entities in the classification scheme.

To add references on an entity the user must have the Create reference permission.

The user can add a reference on existing entities by selecting the Actions command in the command bar and New reference in the popup menu.

Note: Functionality is supported in IMiS/ARChive Server version 9.9 or higher.

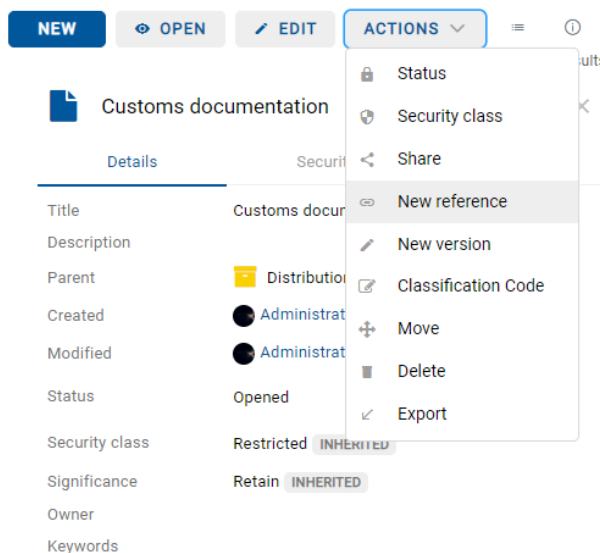


Image 155: The popup menu for selecting the New reference command

The user is shown a dialog box for adding a reference.

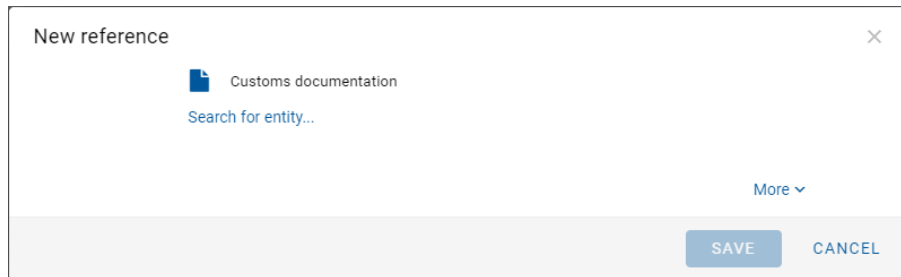


Image 156: The dialog box for adding and editing a reference

By selecting Search for entity, an entity tree opens for the user in the dialog box.

By confirming the selection of the relevant entity (Add), the user establishes a reference between the entities.

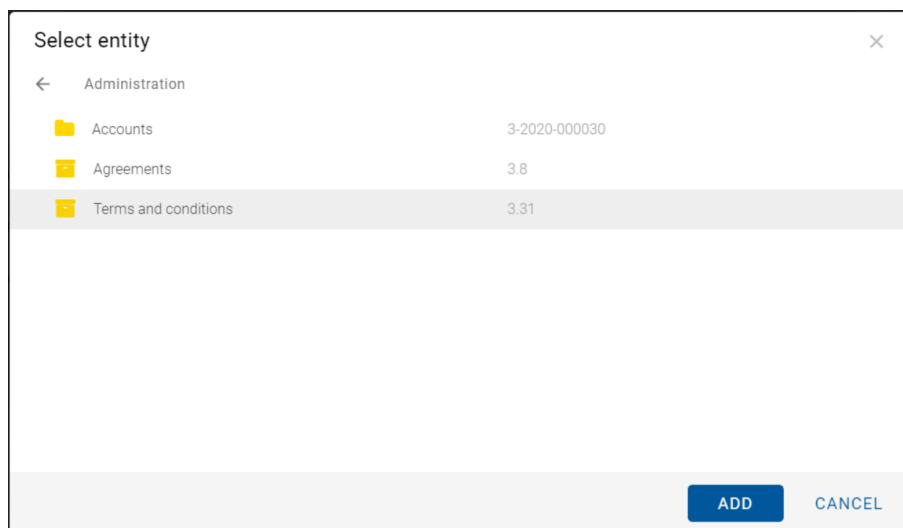
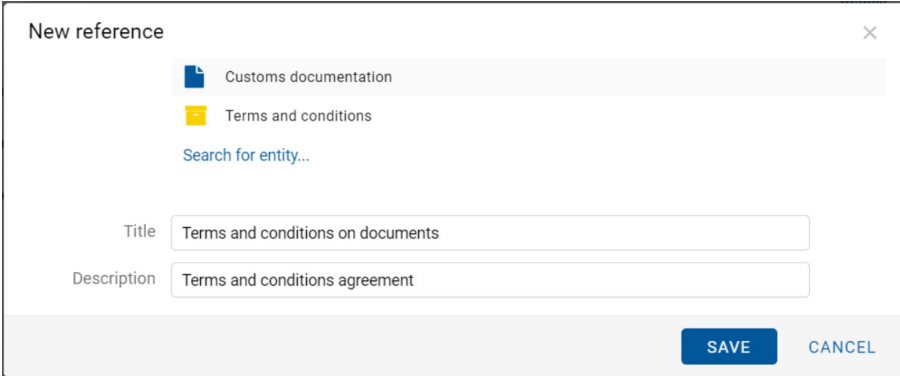


Image 157: Selecting Search for entity« in the New reference dialog box

By selecting More in the dialog box, the user is shown two fields for entering the values of the attributes Title and Description of the reference.


The two attributes are not mandatory. If their values are empty, the fields stay hidden.

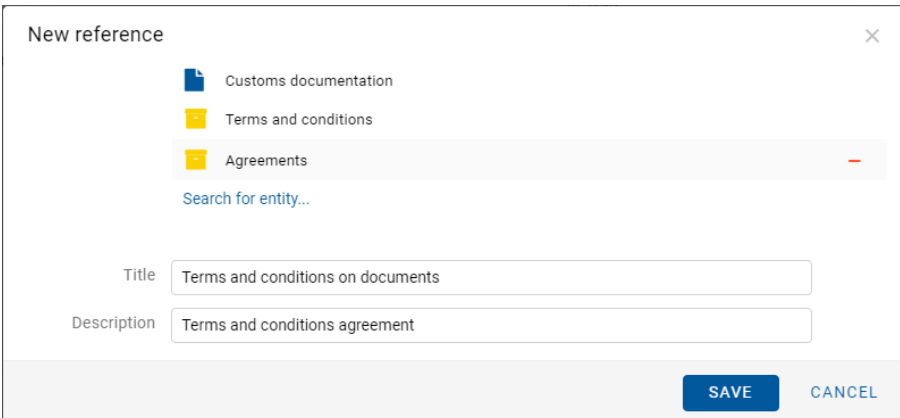
The title of the reference is simply the name of the reference, if there is no reference title and there is only one entity in the reference. If there is more than one entity in the reference, they are shown below the title of the reference.



The screenshot shows a dialog box titled "New reference" with a close button (X) in the top right corner. Below the title, there is a list of entities: "Customs documentation" (with a blue folder icon), "Terms and conditions" (with a yellow folder icon and highlighted), and "Agreements" (with a yellow folder icon). Below the list is a link "Search for entity...". Underneath, there are two input fields: "Title" containing "Terms and conditions on documents" and "Description" containing "Terms and conditions agreement". At the bottom right, there are two buttons: "SAVE" and "CANCEL".

Image 158: Adding the Title and Description in the New reference dialog box

The reference can be removed by selecting the icon  at the end of the record of each reference.



The screenshot shows the same "New reference" dialog box. In this view, the "Agreements" entity (with a yellow folder icon) is selected and highlighted. A red minus icon is visible at the end of the "Agreements" record in the list. The "Title" and "Description" fields remain filled with the same text as in the previous image. The "SAVE" and "CANCEL" buttons are still present at the bottom right.

Image 159: Removing a reference before saving

When adding, modifying or deleting a reference, a notification is shown on save.

The screenshot shows the IMiS/wClient interface. At the top, there is a search bar and a navigation breadcrumb: "IMiS/ARCHIVE Server > Maintenance". A "NEW" button is visible. A notification banner at the top right reads: "Terms and conditions on documents (Customs documentation, Terms and conditions) Entity reference created" with "24 results". Below the notification, a "Details" panel for "Customs documentation" is open, showing fields like Title, Description, Parent (Maintenance), Created (Administrator 28. Aug 2020, 14:12), Modified (Administrator 23. Sep 2021, 08:10), Status (Opened), Security class (Confidential), Significance (Retain), and Owner (Keira Clay). The main area contains a table of entities:

Title ↑	Classification Code	Owner	Significance
Triglav	30-IS-997	Administrator (admin)	Vital
Kanjevec	30-2021-000015	Marko Hren (marko)	Retain
Stol	30-IS-833	Marko Hren (marko)	Retain
Brana	30/IS-812	Keira Clay (kclay)	Delete
Customs documentation	30/000034	Keira Clay (kclay)	Retain
Email: Begunjščica	30/000024	Alex Nelson (anelson)	Retain
Email: Blegoš	30/IS-982	Alex Nelson (anelson)	Retain
Email: Boč	30/000025	Keira Clay (kclay)	Retain
Email: Kladivo	30/000027		Retain
Email: Konj	30/000029	Marko Hren (marko)	Retain
Email: Krim	30/000031	Marko Hren (marko)	Retain
Email: Kum	30/000030		Retain
Email: 複写資料が到着しました【武蔵大学図書館】	30/000038	Alex Nelson (anelson)	Retain
Krn	30/000016	Marko Hren (marko)	Retain
Peca	30/000023	Marko Hren (marko)	Vital

Image 160: Notification about an added, modified or deleted reference

Note: Saving is enabled in the dialog for editing a reference if at least 2 entities are displayed. A reference with a single entity cannot be saved.

References between entities are visible to the user in the set References in the Details tab in the right view. The user can edit the reference in the preview mode or in the open mode by selecting the icon **...** at the end of the reference record.

One exception is a document classified under a folder, in which case the set References is visible only in open mode.

By selecting the Edit command, the user can edit existing references or add new ones.

By selecting the Delete command, the user removes the reference from the list.

The user cannot delete an entity that contains a reference which the user is editing.

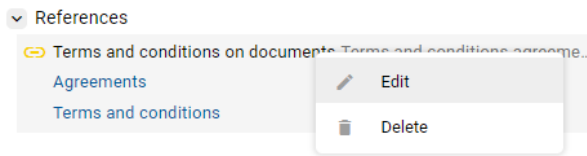


Image 161: A dialog box for selecting an action on the reference

4.3.4 Entity move

The IMiS®/wClient enables the movement of entities across the classification scheme.

To move entities, a user requires the following permissions:

- Move: on the entity he is moving.
- Delete: on the entity he is moving.
- Create entities: on the newly selected parent entity or root class.

To begin moving single or multiple entities within the classification scheme, select the entity you wish to move, and then the Move command, which is available via:

- Actions command in the command bar.

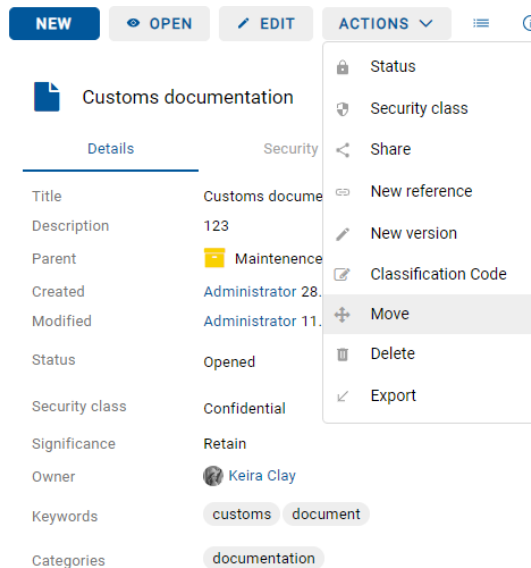


Image 162: Selecting the Move command via the Actions command in the command bar

When selecting the Move command, user will receive the Move dialog box, where he selects new parent entity from the list of entities, and the Reason field to enter the reason for the move. The move of the entity is confirmed using the Move button.

The screenshot shows a 'Move' dialog box with the following fields and content:

- Selected:** Customs documentation
- Target:** IMiS/ARChive Server > Maintenance > Triglav
- Classification Code:** (empty field)
- Reason*:** Move under appropriate class

Below the fields is a list of entities under the 'Maintenance' category:

Entity Name	Classification Code
Prisojnik	30-IS-462
Triglav	30-IS-997
Kanjevec	30-2021-000015
Mojstrovka	30-IS-0'81
Olševa	30-IS-328
Razor	30-2021-000011
Stol	30-IS-833

At the bottom of the dialog, there are three buttons: 'New', 'Move' (highlighted in blue), and 'Cancel'.

Image 163: A dialog box for moving an individual entity

The user can manually set a new classification code for the entity when moving it. In the dialog box for moving, the user enters the new classification code in the field for entering the value of the attribute Classification code.

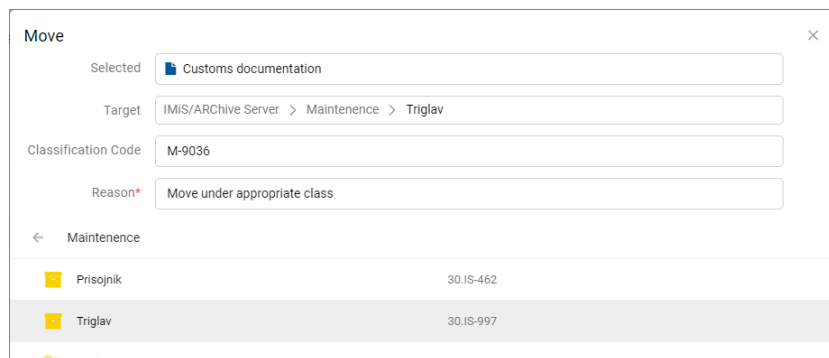


Image 164: Manually assigning the classification code when moving

If multiple entities are being moved, the user marks the entities and selects the action Move in the menu.

In the dialog box, the user specifies the reason for the move and selects the entity to which the selected entities will be moved.

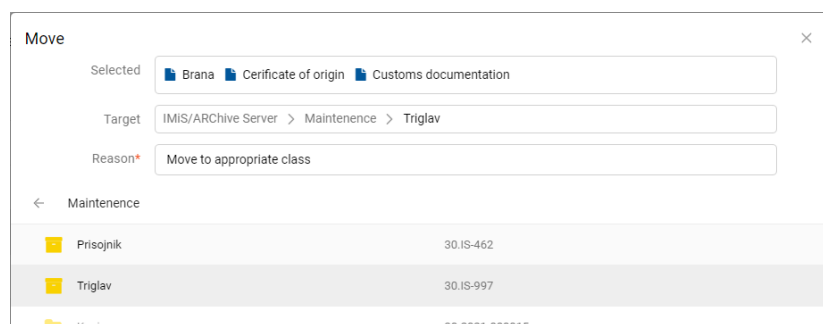


Image 165: A dialog box for moving multiple entities

Before the move, the user can create a new entity by selecting the command New in the dialog box. For more information see chapter [Creating a new entity](#).

The classification code serves as a unique locator of the entity within the classification scheme. It consists of the relative (own) classification codes of the entities.

When moving, the following rules for renumbering the classification code apply depending on the manual, manual (optional) or automatic setting of the entity classification code in the moving entity tree:

- The entities in the moving entity tree, which are located directly under the entity with a manual or manual (optional) setting of classification codes, are not renumbered; all other entities are renumbered if the counter context enables it (automatic creation of a classification code on the entity to which the entity tree is moving).
- Moving an entity with a manually or manually (optional) set classification code under an entity which is set to automatically create a classification code causes that entity to be renumbered; the implementation mentioned in point 1 applies to all other contained entities.
- Moving an entity with a manually, manually (optional) or automatically set classification code under an entity which is set to manually assign a classification code is not possible, if a contained entity exists that has the same partial classification code as the source entity. If the move is possible, the entity tree is moved. Due to an invalid counter context (manual setting of the classification code), the renumbering is not performed for any contained entity.

Note:

The following rules apply to the user when moving:

- *The user can move all entities, regardless of whether they are closed or opened.*
- *The user cannot move documents which are classified directly under a class under folders.
The user likewise cannot move documents which are classified under folders directly into a class.*

4.3.5 Content management

This chapter describes the following actions over document contents:

- [Capturing content](#)
- [Content details](#)
- [Saving content](#)
- [Content preview](#)
- [Downloading content](#)
- [Content update](#)
- [Copying content](#)
- [Moving content](#)
- [Deleting content](#)
- [Indexing content](#)
- [Content conversion.](#)

4.3.5.1 Capturing content

The user captures the content of documents by using the:

- File system command, by selecting the specific content.
- Scanner and the enabled services of IMiS®/Capture Service.

4.3.5.1.1 Capturing content from the file system

The IMiS®/wClient enables the capture of those content, that are supported by the IMiS®/ARChive Server and can be described using the IANA-registered content type (MIME type).

The format of the file is recognized from the file's extension. If the file extension is wrong, it is possible the recognized format will also be wrong.

Example:

- *Long-term content storage formats (TIFF, PDF/A).*
- *Formats related to email (e.g. EML, VCF).*
- *Various text, image and graphics formats (e.g. TXT, JPG, DWG).*
- *Microsoft Office formats (e.g. DOCX, XLSX, PPTX).*
- *Webpage file formats (e.g. HTML, XML).*
- *Compression formats (e.g. ZIP, TGZ).*
- *Audio-video formats (e.g. AVI, MP4).*

By selecting a document, the user is shown a list of contents in the central view, if they exist.

In the case of a new document the list is empty.

In editing mode, the contents are displayed below the field for adding contents.



Image 166: The Content field for adding contents

The user adds contents by first selecting the Edit button in the command bar.

This opens a dialog box with entity details, in which the user drops content in the Content field using the Drag and drop mode or clicks it on the list.

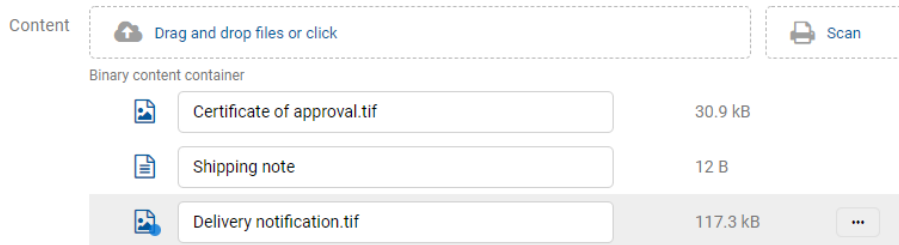


Image 167: The added content before saving


After confirmation the contents are added to the list under the Content field. After the user has finished capturing contents, the document can be saved.

For more information see chapter [Saving an entity](#).



Image 168: The added content after saving

The contents are shown below the bar with the titles of the common attributes in open mode. Description and Size are shown by default.

The user can add or remove the column of selected attributes Modified via the icon  in the command bar.

Note:

Attaching contents is possible only in the Document entity type.

IMIS/ARChive Server > Other > Despatch note




Title	Size	Modified
 Certificate of approval.tif	112.7 kB	7. Sep 2021
 Delivery notification.tif	117.3 kB	7. Sep 2021
 Shipping note	12 B	7. Sep 2021

Image 169: Displaying the list of contents in open mode

4.3.5.1.2 Capturing content from a scanner

If a suitable service key record has been defined in the settings of the IMiS®/Capture Service and the user profile in the IMiS®/wClient, the icon “Scan” appears in the field for adding contents.

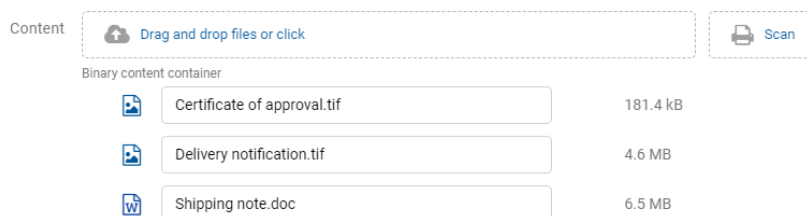


Image 170: Displaying the icon Scan for capturing content from a scanner

Note: If the icon “Scan” is not shown, check the settings:

- of the service key in the “Security” tab of the IMiS®/Capture Service.
For more information see chapter [Security settings in IMiS®/wScan Manual](#).
- of the service and security key address in the IMiS®/wScan section in the “Settings” tab.
For more information see chapter [The Details tab](#).

By selecting the icon Scan, the user is shown an integrated window for scanning using the IMiS®/wScan program module.

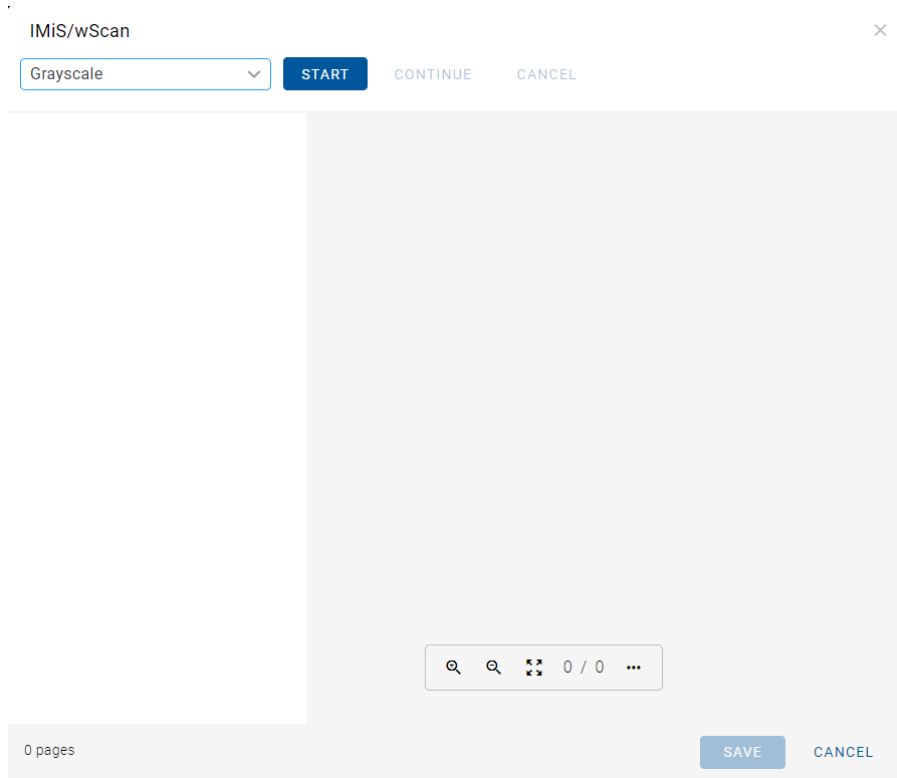


Image 171: Integrated window for scanning with IMiS®/wScan

Note:

If the user has connected or turned on the scanner cable later and the command Start is still disabled, we recommend restarting IMiS®/Capture Service with the command Restart Service.

By selecting the Start command, the scanning of documents is executed. The user receives a report with the basic scanning information.

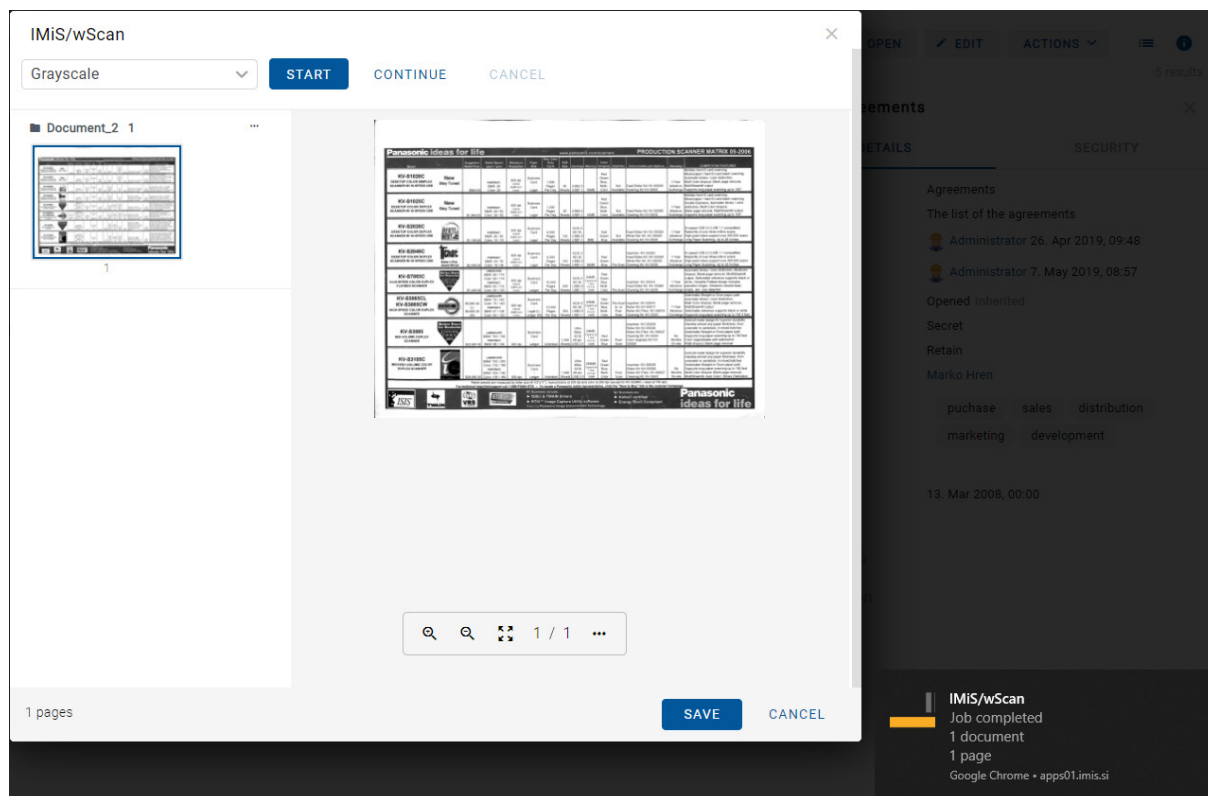


Image 172: Displaying the document after finishing the scan

After finishing the scan, the user adds the scanned document to the list of content pages.

By selecting the popup menu on the view of thumbnails of the scanned document, the user can choose from the following options:

- Download: download an individual page in the PNG format.
- Insert before: Continues scanning before the selected page.
- Insert after: Continues scanning after the selected page.
- Rotate right: rotates page to the right.
- Rotate left: rotates page to the left.
- Delete: deletes an individual page.
- Properties: content properties (this functionality is currently not supported).

By selecting the Save command, the user saves the scanned content to the IMiS®/ARCHive Server.

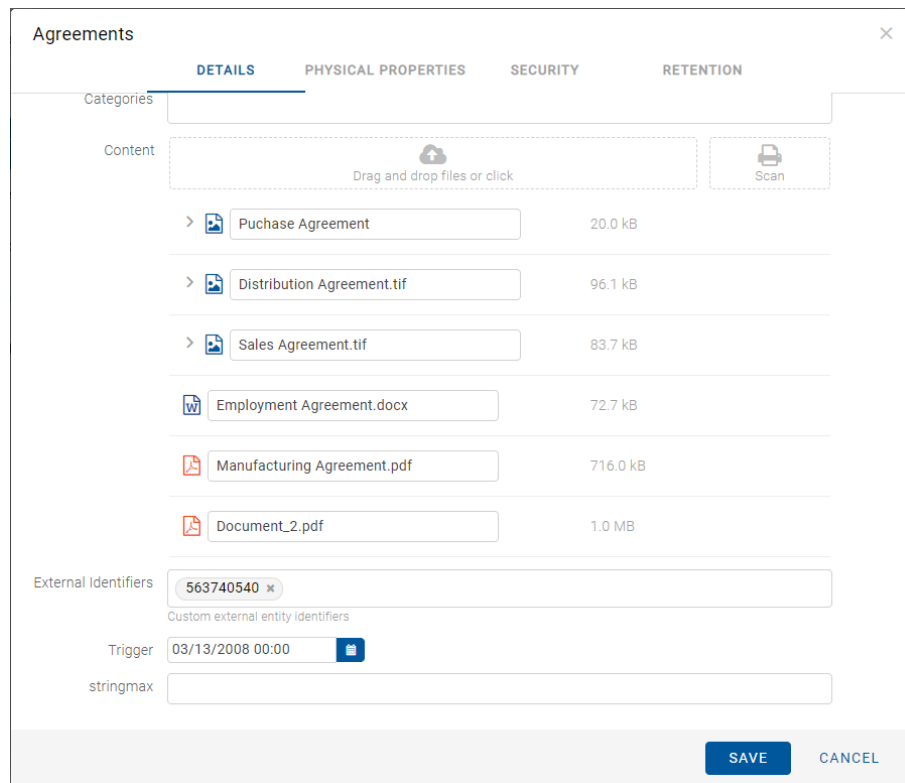


Image 173: A scanned document added to the list

For more information on setting IMiS®/Capture Service see chapter [Application integration in the IMiS®/wScan Manual](#).

***Note:** The scanning settings are located in the Settings tab or in the configuration settings.json under scan.apiKey and scan.url.*

***Troubleshooting:** Most frequent issues when capturing content:*

- The file does not exist.
- Wrong MIME type of file.

4.3.5.2 Content details

The entity content details provide certain information to the user which is otherwise not shown in the list of contents. If the details are not shown in the right view by default, the user can access them by selecting the »Details« command in the popup menu on the tagged content.

Besides the list of contents, the user is also shown the following entity content details in the right view:

- Description: content description.
- Entity: the title of the entity.
- Type: content type.
- Content type: MIME content type.
- Size: content size in kB.
- Created: timestamp of the content creation.
- Modified: timestamp of the last change of the content.
- Accessed: timestamp of the last access to the content.
- Indexed: states whether the content is indexed.
- Signed: a value that registers if the email message was electronically signed.
- Identifier: unique identifier of the content.

The screenshot displays the IMiS/ARChive Server interface. The breadcrumb path is 'IMiS/ARChive Server > Administration > SpaceX'. The main content area shows a table with two entries:

Title	Size	Modified
SpaceX General instructions.docx	2.2 MB	11. Mar 2020
Go-to-Market_SpaceX.pdf	65.5 kB	18. Nov 2020

The right-hand pane shows the details for the selected file 'Go-to-Market_SpaceX.pdf'. The details are as follows:

CustomContent	
Description	Go-to-Market_SpaceX.pdf
Type	PDF
Content Type	application/pdf
Size	65.5 kB
Created	18. Nov 2020, 15:58
Modified	18. Nov 2020, 15:58
Accessed	20. Sep 2021, 16:15
Indexed	Yes
Signed	Yes
Container	CustomContent
Identifier	MBXg_vvoa1dQoUhzmmH20VjW4vuf9kc


Image 174: Content details in the right view

Of all the displayed data the user can change only the description of the content when in entity editing mode.



Image 175: Changing the description of content in editing mode

Note: Depending on the template settings in the IMiS®/ARChive Server administrative interface, the logged-on user also has the option of saving content to the “Custom content container”. For more information see the chapter [Moving content](#).

By selecting the content from the list in the central view, the following options are available to the user in the popup menu  in reading mode (Open):

- Preview: opening content in the preview mode.
- Download: downloading the content to a computer or device.
- Copy: copying content to another document.
- Details: displaying information on the content. These details are displayed if they were not displayed yet.
- Manage: tagging the content for executing specific actions.
 - Queue for Indexing: the selected content is tagged for later indexing.
 - Queue for Conversion: the selected content is tagged for later conversion.

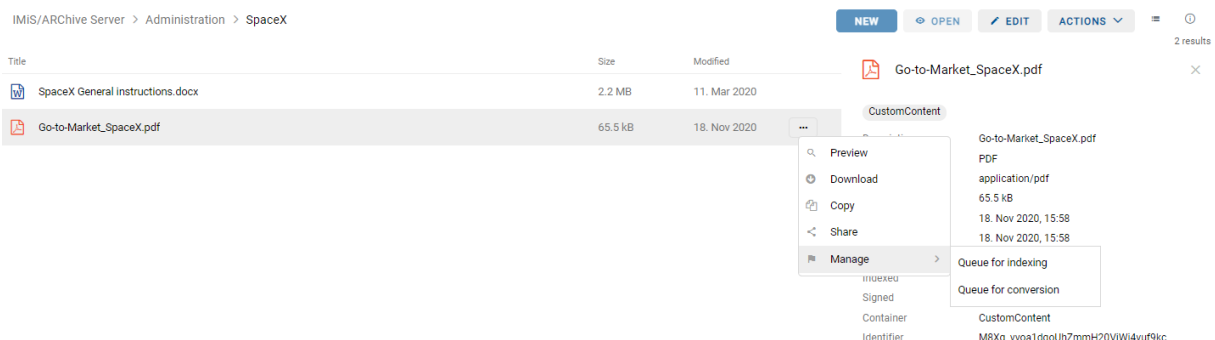


Image 176: Popup menu on the selected content in the reading mode

4.3.5.3 Saving content

When saving document content to the IMiS®/ARChive Server, the following attribute values are automatically recorded into the entity:

- Content type: the type of the content output format (MIME type).

Content Type application/pdf

Image 177: An example of the content type of a document

- Created: the date the document content was created on the server. As long as the content exists, the attribute value does not change.

Created 10. Mar 2020, 08:25

Image 178: An example of the date of creating the document content

- Modified: the date the user changed the document content. As long as the document content exists, the attribute value changes with each change of content.

Modified 30. Jun 2020, 13:34

Image 179: An example of the date of modifying the document content

- Accessed: the date and time the document content was last opened in reading mode or in editing mode. As long as the content exists, the attribute value changes each time the user opens or modifies the content.

Accessed 30. Jun 2020, 13:34

Image 180: An example of the date of the last access to the document content

- Identifier: The unique identifier of the content of the document saved on the server. As long as the content exists, the attribute value does not change.

Identifier UhwTMq4NrM0qw7HjhmVy2s6Z6VGe58kA

Image 181: An example of the document content identifier

- Indexed: A value that shows whether the document content is indexed.

Indexed Yes

Image 182: An example of a display of indexed document content

- Signed: A value that shows whether the document content is electronically signed.

Signed No

Image 183: An example of a display of signed document content

4.3.5.4 Content preview

The content can be previewed by a user with the Read permission.

The user opens the document content by selecting Preview in the popup menu on the tagged content in the reading mode (Open).

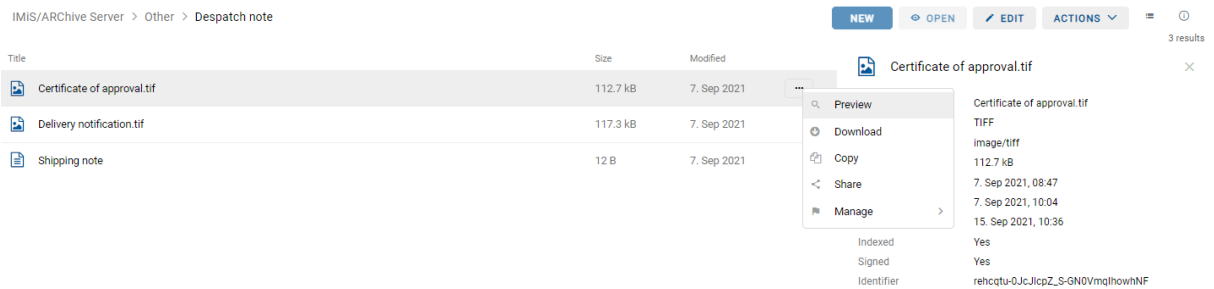


Image 184: Opening document content

An alternative option is that the user simply clicks on the content record.



Image 185: Opening content by clicking on the content

If the logged-on user has the “Write” permission, then in edit mode they can select the command “Preview” in the popup menu on the marked content.

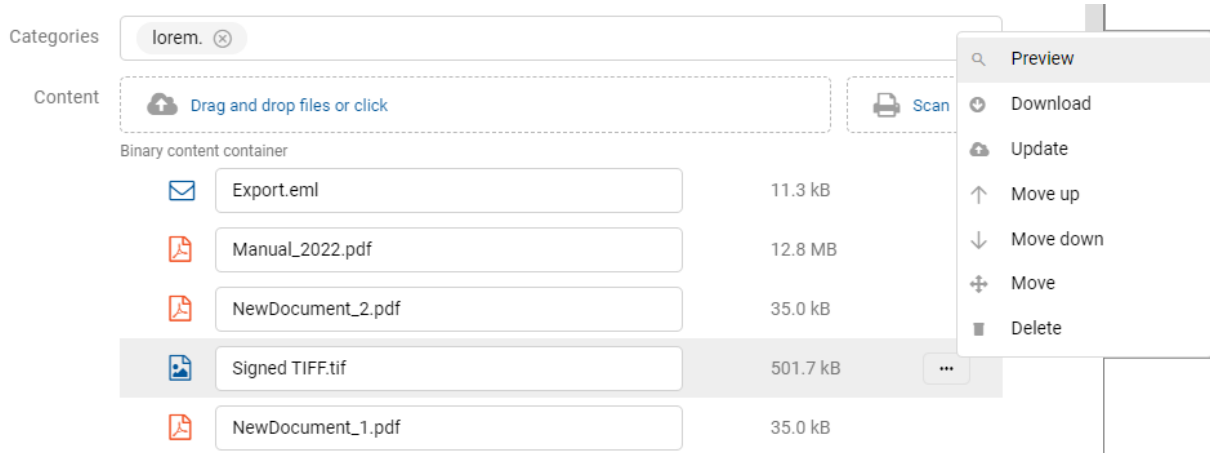


Image 186: Selecting the “Preview” command in the popup menu

Certain contents are opened directly in the browser’s viewer; if that is not possible, the contents are downloaded and opened with an external viewer.

For more information on downloading content see chapter [Downloading content](#).

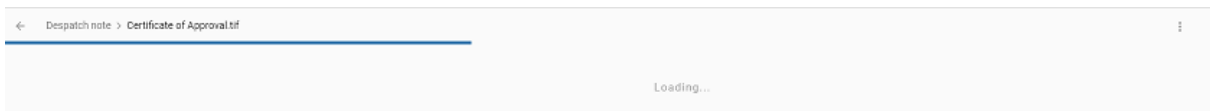


Image 187: Loading content

By selecting the content preview, in the case of multiple contents a menu appears at the bottom for selecting and displaying contents under a specific entity. The user switches between contents by clicking on the title of each content or using the left/right keys on the keyboard.

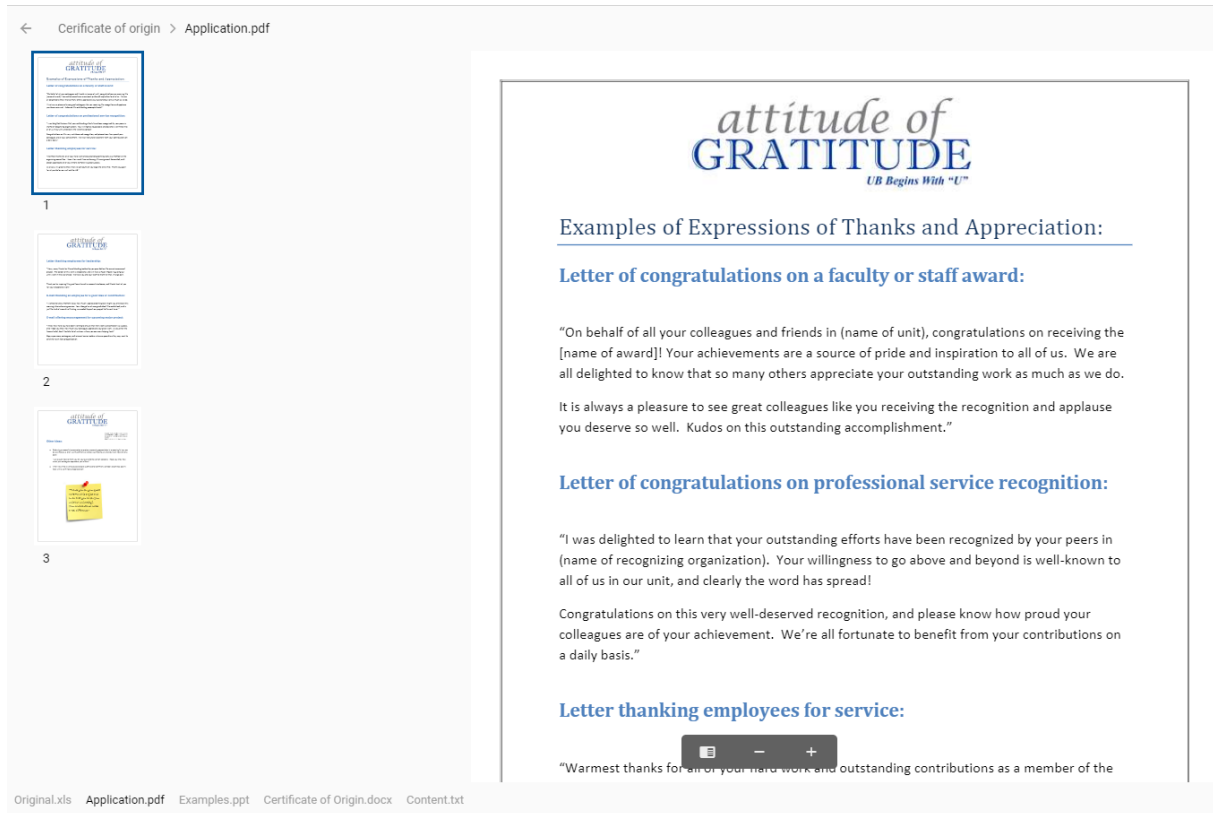


Image 188: Displaying the menu for selecting and previewing content

Note In the content preview, where the text can be marked, the logged-on user can do so by right-clicking and choosing the action "Copy", or with the combination of the Ctrl+C keys.

For easier and faster searching by the pages of the contents of PDF/A and TIFF formats, the user can use the side menu with the thumbnails of document pages.

Located on the displayed content pages is a menu for zooming in or out of the displayed content and the side menu view.

By selecting the top right menu, the user can perform the following:

- Download: downloading the content to a computer or device.
- Share: copies the link to the selected content and shares it with other users.

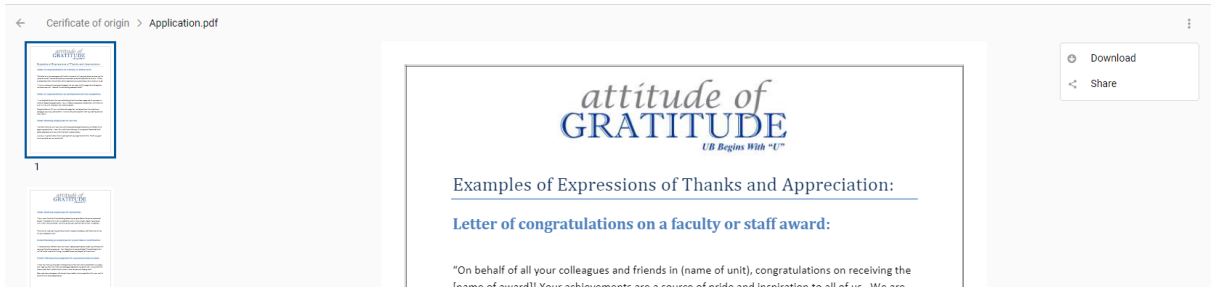


Image 189: Selecting the menu on the content preview

The user has the option of previewing content with the link `archive/:archive/entities/:id/view` with the parameters `index` and `id`.

Example 1: Link with the parameter id

<https://apps01.imis.si/wclient/1.5.2010.5/#/archive/iarc101-x64/entities/BMtozc348swzj1NCSyWXEaUH44UD65j4/view?id=Qgi2oGjJOdcwztmOBE7slvULSbamjyh&ver=4/OBJECTS>

Example 2: Link with the parameter index 1

<https://apps01.imis.si/wclient/1.5.2010.5/#/archive/iarc101-x64/entities/BMtozc348swzj1NCSyWXEaUH44UD65j4/view?id=Qgi2oGjJOdcwztmOBE7slvULSbamjyh&ver=4/OBJECTS/VIEW?INDEX=1>

Example 3: Link without parameters, which opens the first object

<https://apps01.imis.si/wclient/1.5.2010.5/#/archive/iarc101-x64/entities/BMtozc348swzj1NCSyWXEaUH44UD65j4/view?id=Qgi2oGjJOdcwztmOBE7slvULSbamjyh&ver=4/VIEW>

IMiS®/wClient and IMiS®/Storage Connector Services REST use the Web Application Open Platform Interface (WOPI) protocol for integration with Office Online. It defines the mode of interaction between the WOPI server (IMiS®/Storage Connector Services REST) and Office Online. In the settings (assets/settings.json) the addresses of the Office Online server must be defined in order to be able to preview Word, Excel and PowerPoint contents.

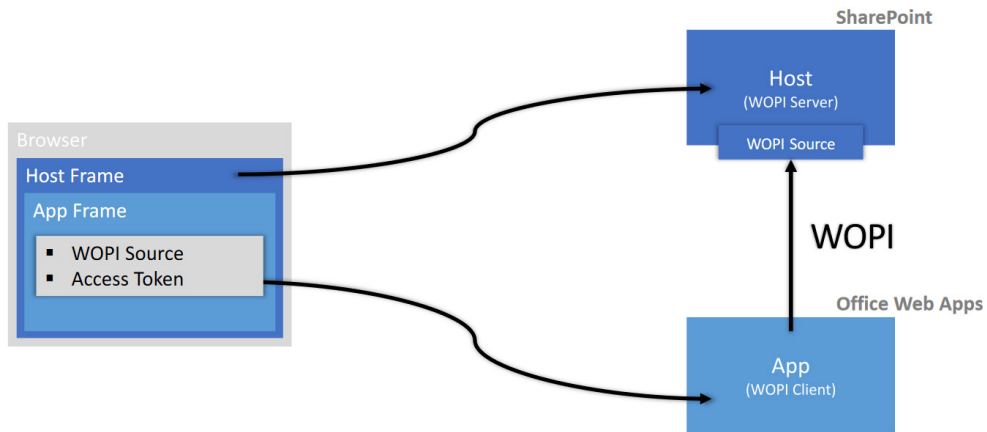


Image 190: WOPI flow chart

It enables the user to preview Word, Excel and PowerPoint contents.



Image 191: Opening MS Office content

In the context of the content formats which are supported on the IMiS®/ARCHive Server and can be described with IANA-registered content types (MIME type; see chapter [Capturing content](#)), the user can play the following audio and video contents in streaming mode:

- Audio (wav, ogg, mpeg)

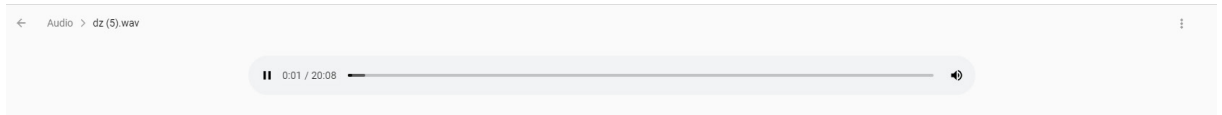


Image 192: Opening audio content

- Video (mp4, webm, ogg)

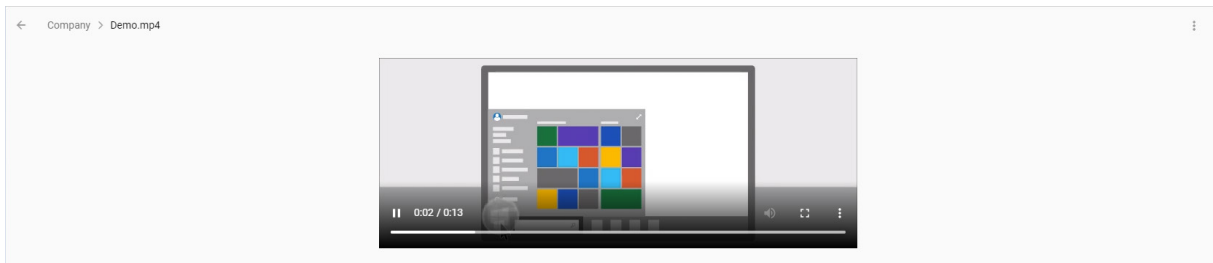


Image 193: Opening video content

Note: Previewing audio and video contents is possible if the content has been optimized for online viewing.

4.3.5.5 Content printing

Content in the PDF, XML, TEXT, JSON, JPEG and PNG formats can be printed from the preview. By selecting the content printing icon (or the shortcut Ctrl + P) in the top right menu, a new tab opens showing the content.

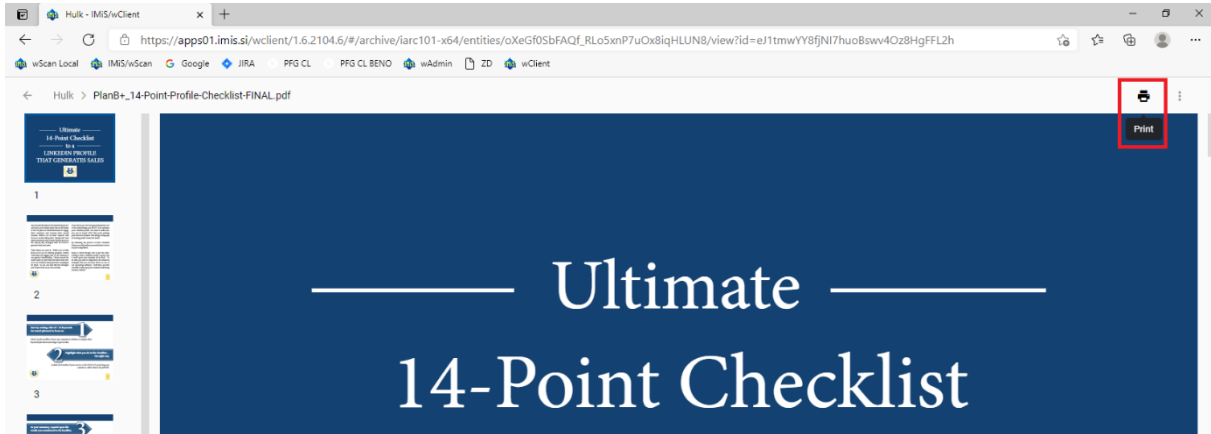


Image 194: Selecting the content printing icon

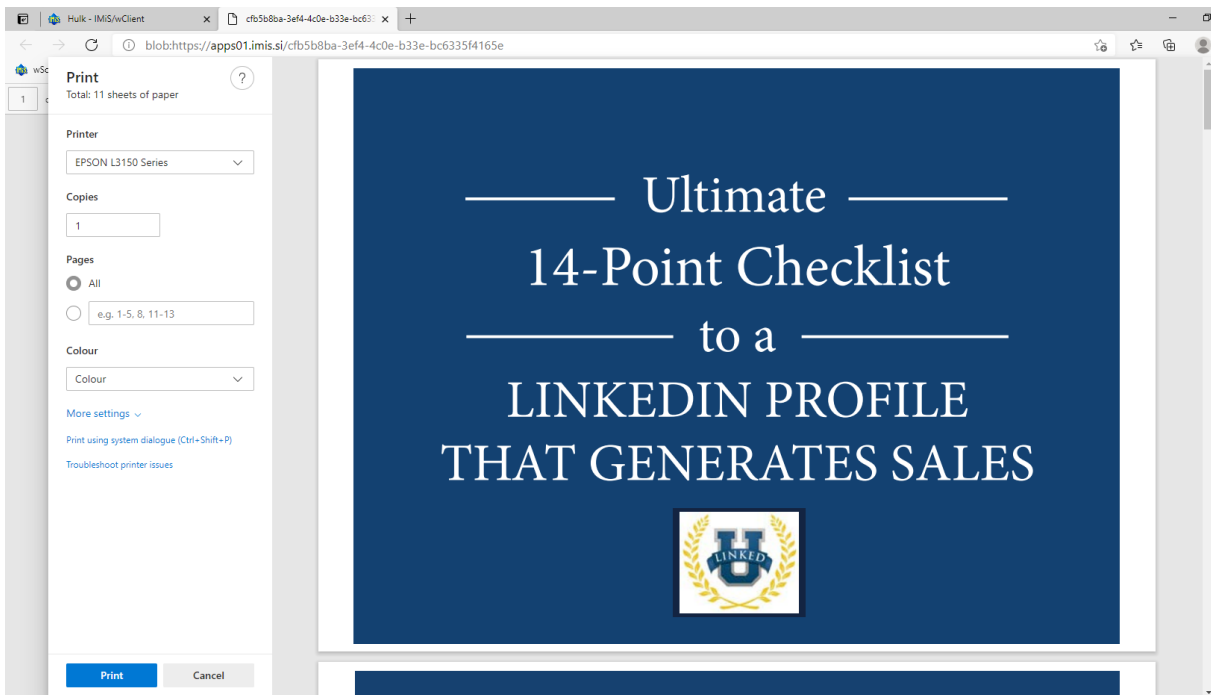


Image 195: Content printing preview and settings

4.3.5.6 Downloading content

The content can be downloaded by a user with the Read permission.

By selecting the Download command in the popup menu on the tagged content in the document reading mode (Open), the user downloads the content to the device.

The content is saved in the selected location on the device.

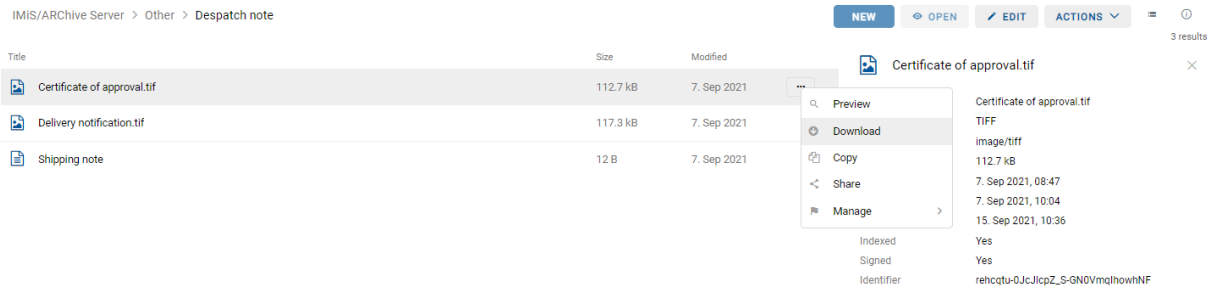


Image 196: Selecting the Download command in the popup menu

In the bottom left corner, the user is shown the progress of the download of content and the Cancel option.

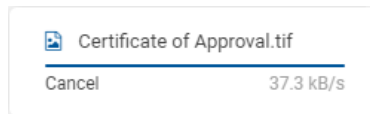


Image 197: Displaying the progress of the download of content

By selecting the popup menu on the notification about downloaded content, the user has the option of selecting actions.

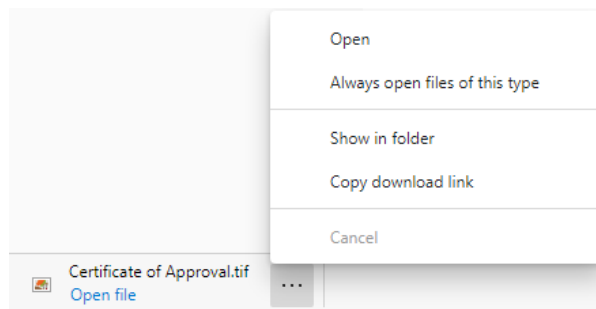


Image 198: Displaying the option of selecting actions on downloaded content

If the logged-on user has the “Write” permission, then in edit mode they can select the command “Download” in the popup menu on the marked content.

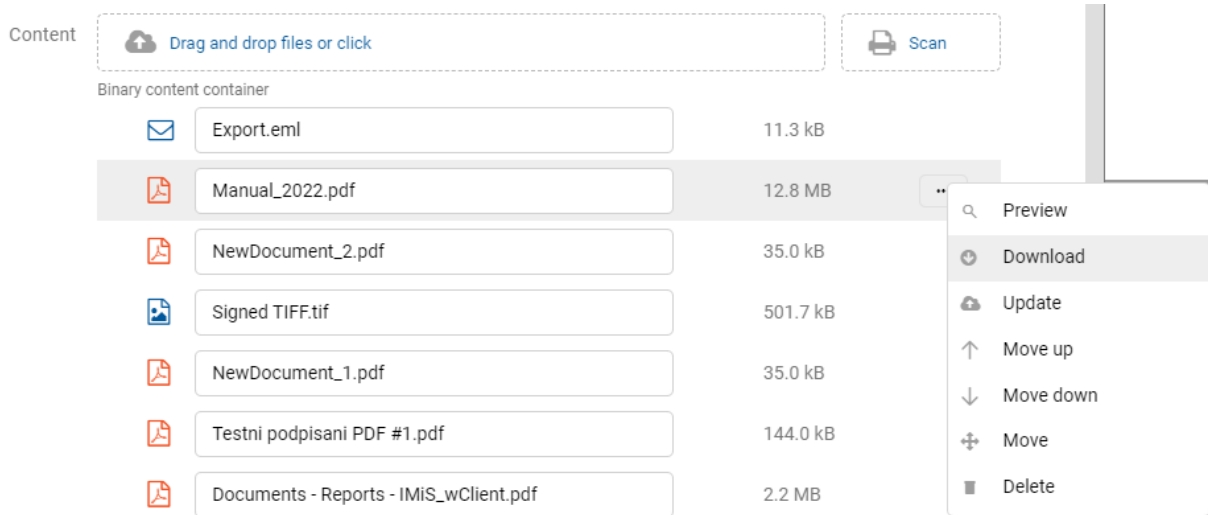


Image 199: Selecting the “Download” command in the popup menu

4.3.5.7 Copying content

Copying content can be performed by the user with the Write right.

The user makes a copy of the entity's content and copies it to another document-type entity. The user selects the content in the Open mode. By selecting the popup menu on the tagged content, the user selects the Copy command.

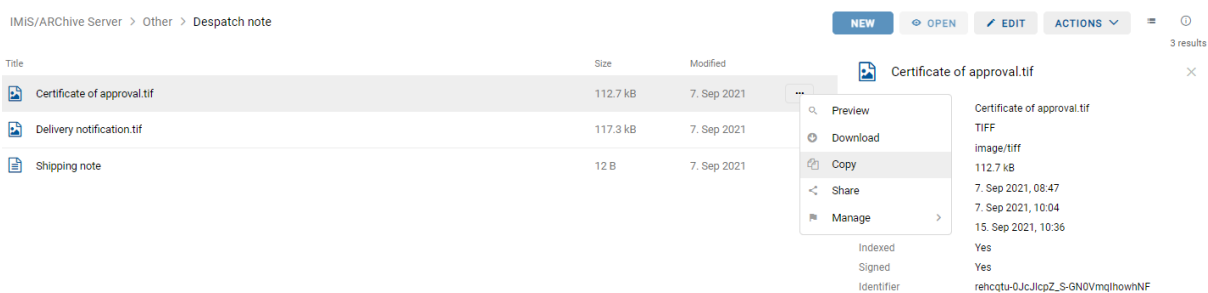


Image 200: Selecting the Copy command in the popup menu

This opens a dialog box for selecting the target document in the classification scheme.

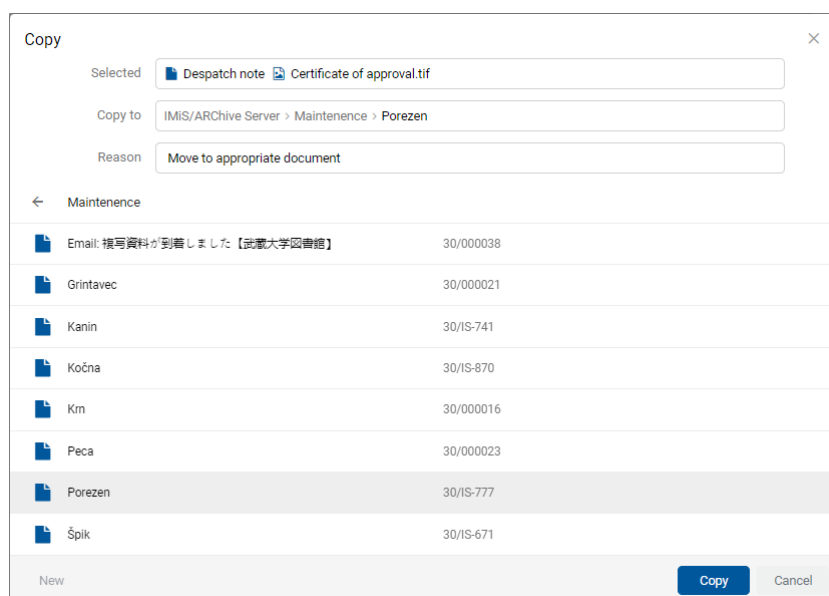


Image 201: Copying the content to another document

After confirming the Copy command, a copy of the content is saved to the selected document. The user is informed of saving a copy of the content.



Image 202: Information about saving a copy of the content

4.3.5.8 Sharing content

The content can be shared by a user with the »Read« permission.

The user creates a copy of the link to the entity's content and saves it to the clipboard.

In open mode, the user selects the content. By selecting the popup menu on the tagged content, the user selects the command Share.

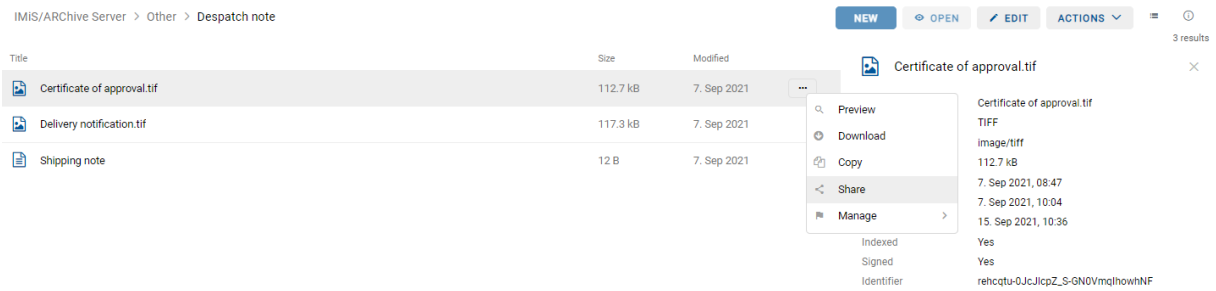


Image 203: Selecting the command Share in the popup menu

A dialog box opens containing the created link to the selected content.

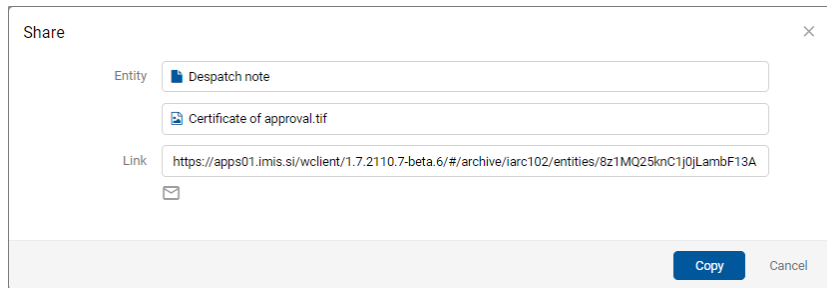


Image 204: Displaying the created link to the selected content

By confirming the action Copy, the link to the content is copied to the clipboard.

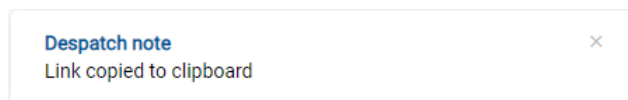


Image 205: Notification of copying a link to the clipboard

4.3.5.9 Content update

Content update can be performed by the user with the Write right.

The user has the option of updating saved content. In editing mode, the user selects the document content. In the popup menu the user selects the Update command.

This opens a dialog box for selecting the content which will replace the existing content. If the user does not change the title of the content, it is preserved.

The user confirms the change to the entity with the Save command or cancels it with the Cancel command.

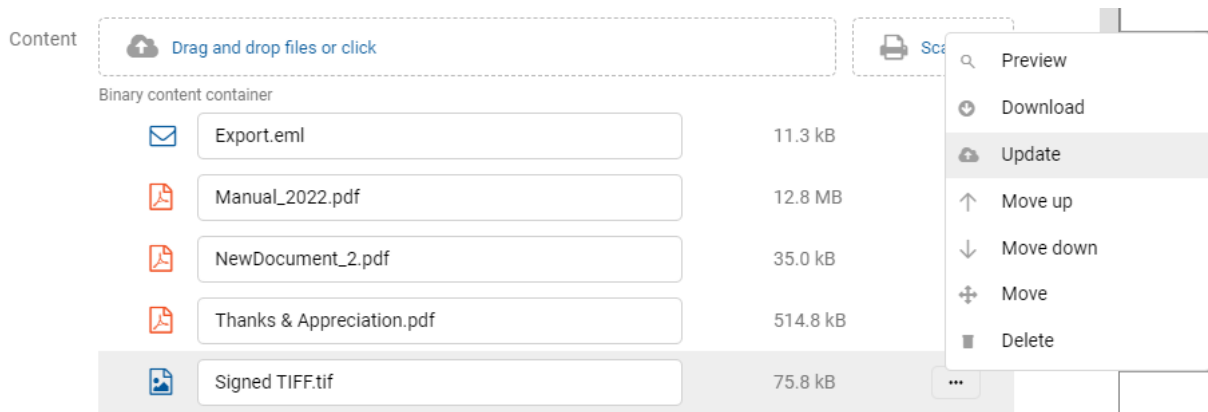


Image 206: Selecting the »Update« command in the popup menu



Image 207: The selected content after update

4.3.5.10 Moving content up/down

The actions “Move up” and “Move down” enable moving content in the list by one position.

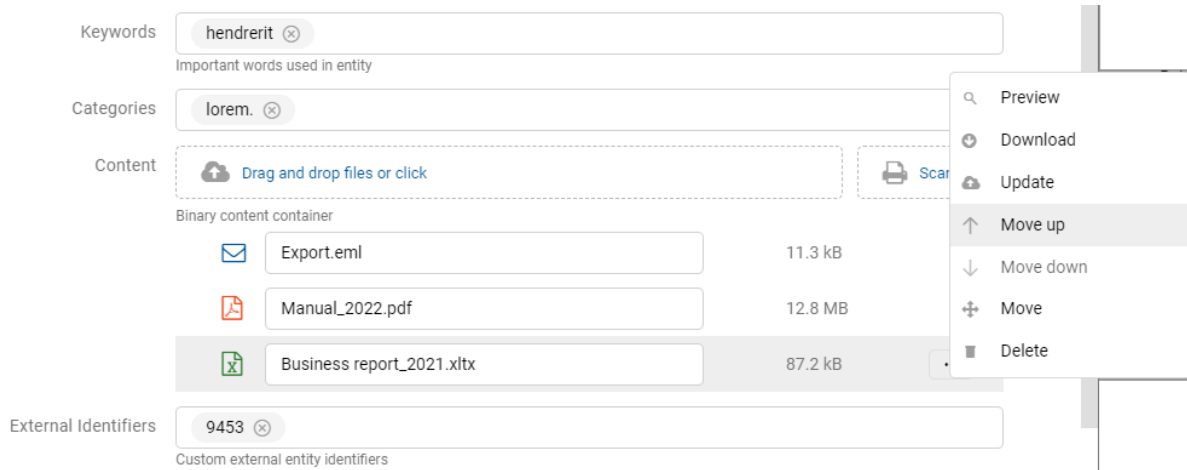


Image 208: Selecting the “Move up” command in the popup menu

4.3.5.11 Moving content between entities

Moving content from one entity to another can be performed by the user with the Write right. The user selects the content in the editing mode. In the popup menu on the tagged content, the user selects the Move command.

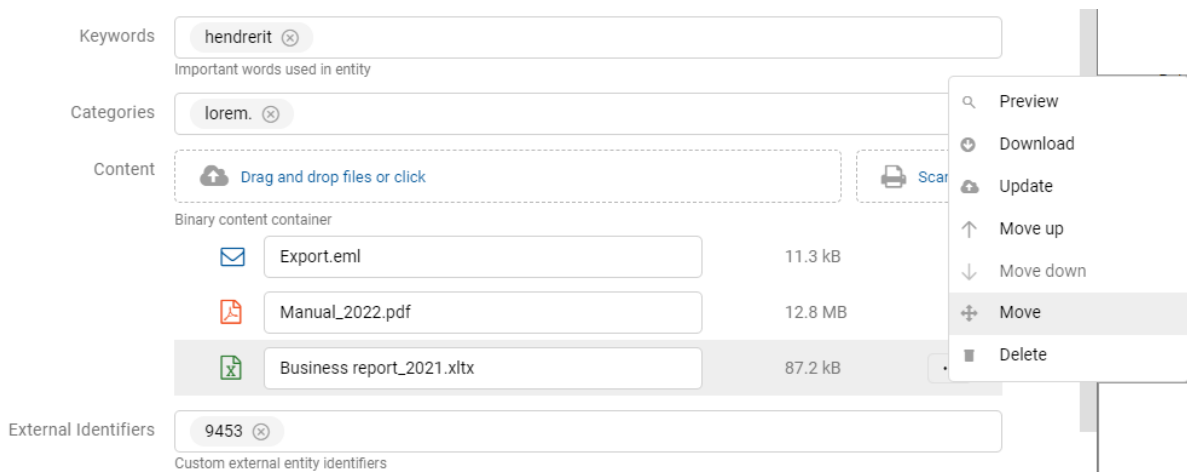


Image 209: Selecting the Move command in the popup menu

This opens a dialog box for selecting the target document in the classification scheme.

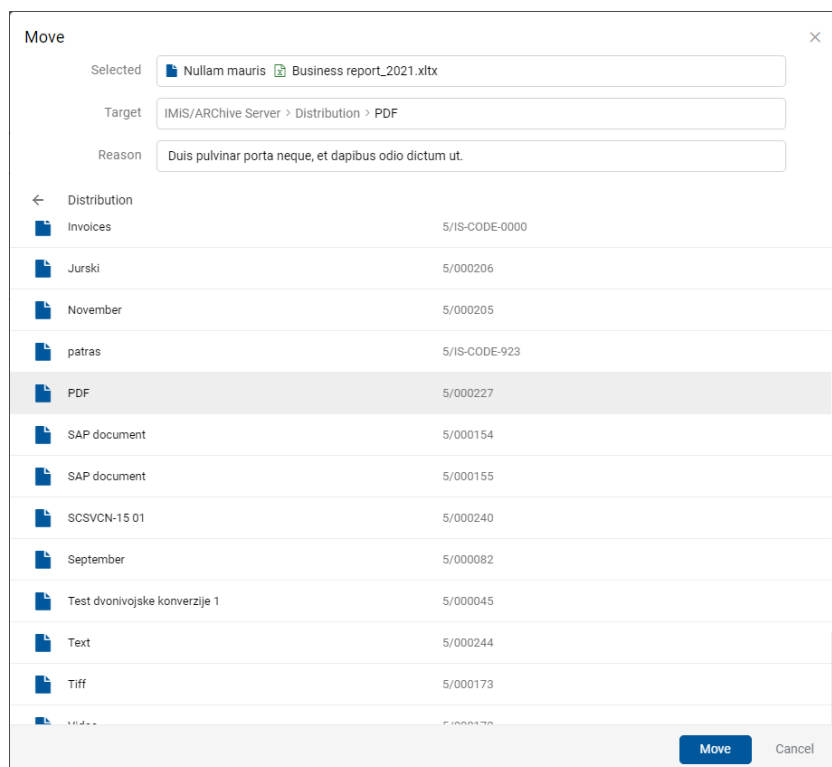


Image 210: Selecting the target document for moving content

By confirming the selection with the Move command, the content is tagged to move.

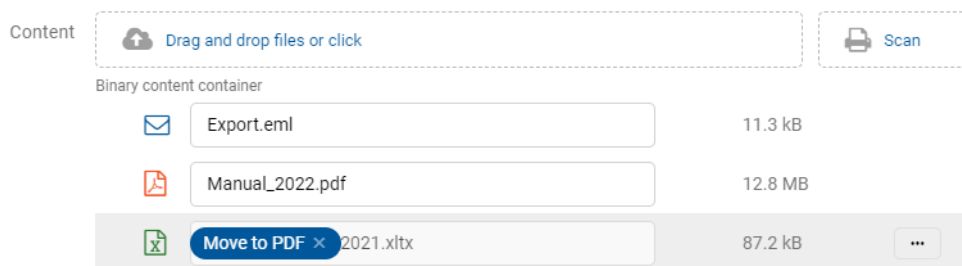


Image 211: Content temporarily removed from the document

Content move is not performed until after saving changes.

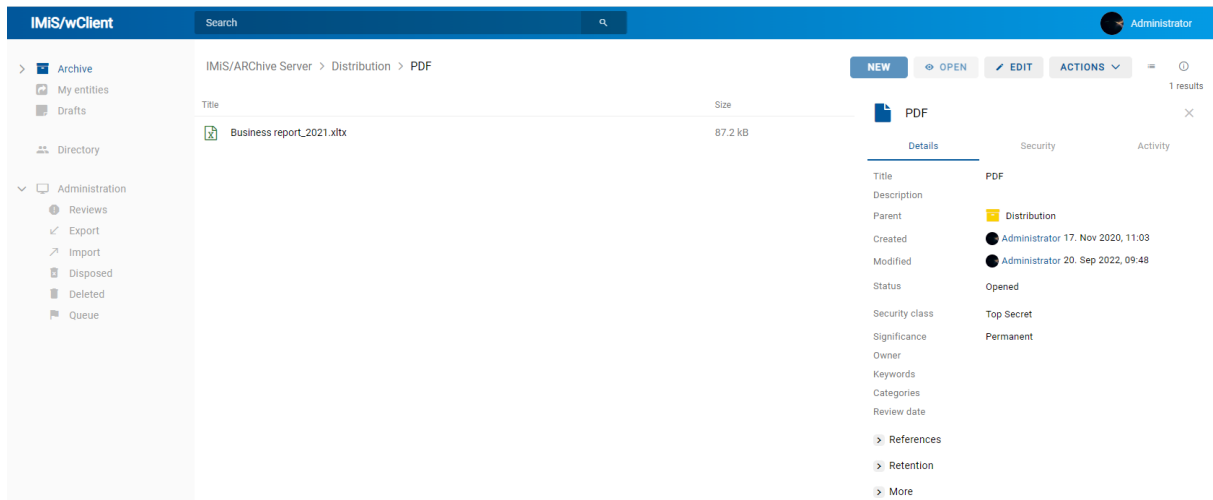


Image 212: Saved document content

The logged-on user can also move content to the “Custom content container”. When selecting the target document for moving content, an additional “Container” attribute is shown if the template contains an attribute of the File type.

The user selects accordingly from the set of values.

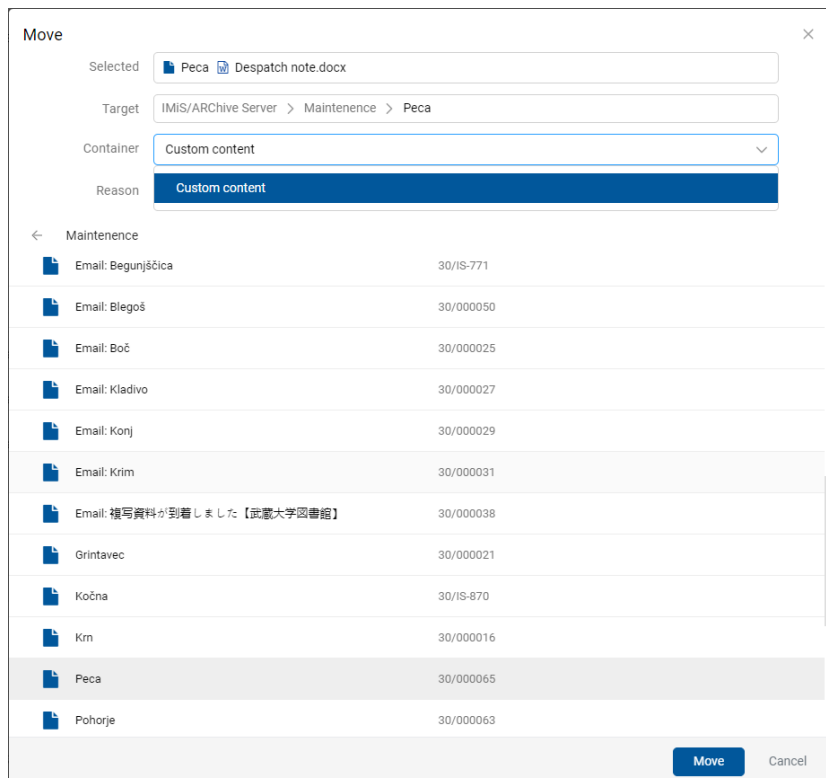


Image 213: Selecting the target document for moving content to the custom content container

By confirming the selection with the Move command, the content is tagged to move to the custom content container.

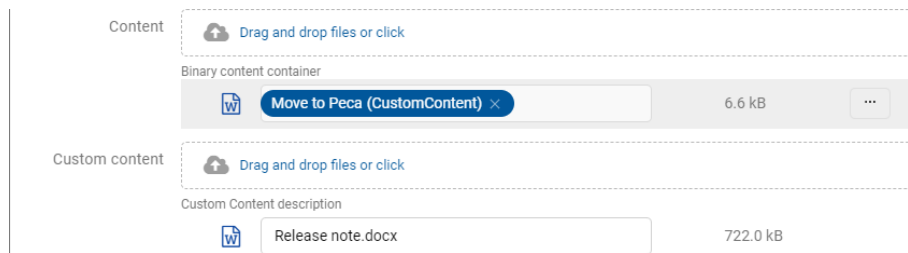


Image 214: Content temporarily removed from the document

Content move to the custom content container is not performed until after saving changes.

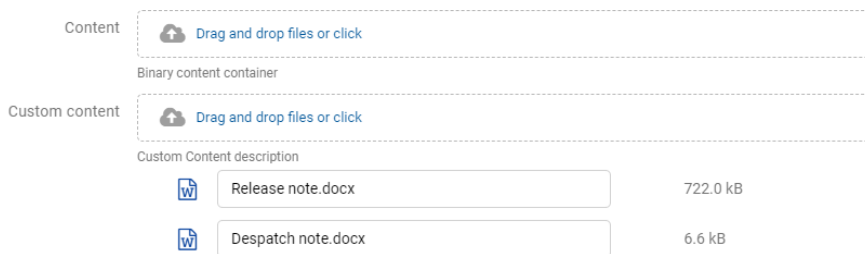


Image 215: Saved document content to the custom content container

4.3.5.12 Deleting content

Deleting content can be performed by the user with the Write right.

The user removes document content by first selecting the document content in Edit mode.

In the popup menu the user selects the Delete command. The content is removed from the list.

The user confirms the change to the entity with the Save command or cancels it with the Cancel command.

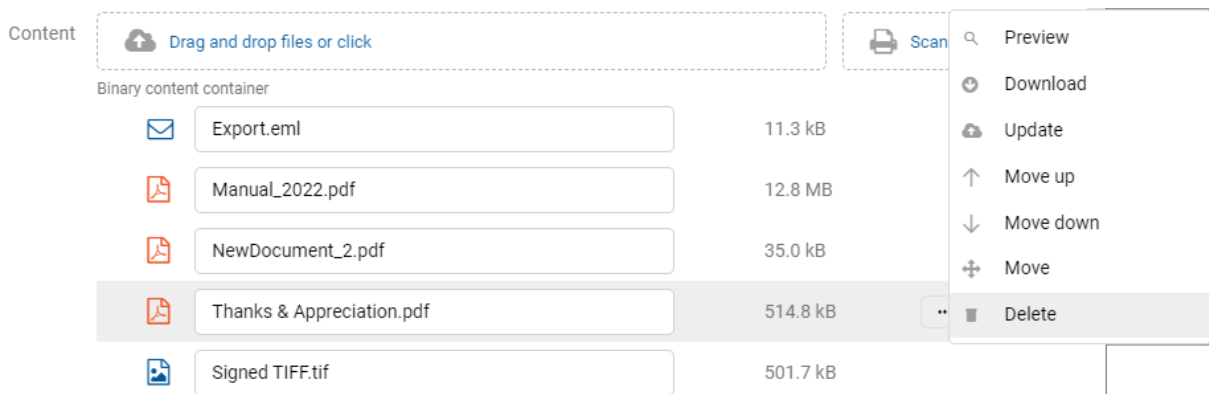


Image 216: The content on the list before deletion

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Title	Size
 Export.eml	11.3 kB
 Manual_2022.pdf	12.8 MB
 NewDocument_2.pdf	35.0 kB
 Signed TIFF.tif	501.7 kB
 NewDocument_1.pdf	35.0 kB
 Testni podpisani PDF #1.pdf	144.0 kB

Image 217: The content on the list after deletion

4.3.5.13 Indexing content

The manual tagging of content for indexing can be performed by the user with the ContentManagement role.

By selecting the popup menu on the tagged content in the document reading mode (Open), the user can select the “Manage” command. By confirming the “Queue for Indexing” command, the selected content is tagged for later indexing.

The indexing of content can be done automatically with the appropriate settings on the IMiS®/ARChive Server or manually for an individual content within the interval specified in the server settings.

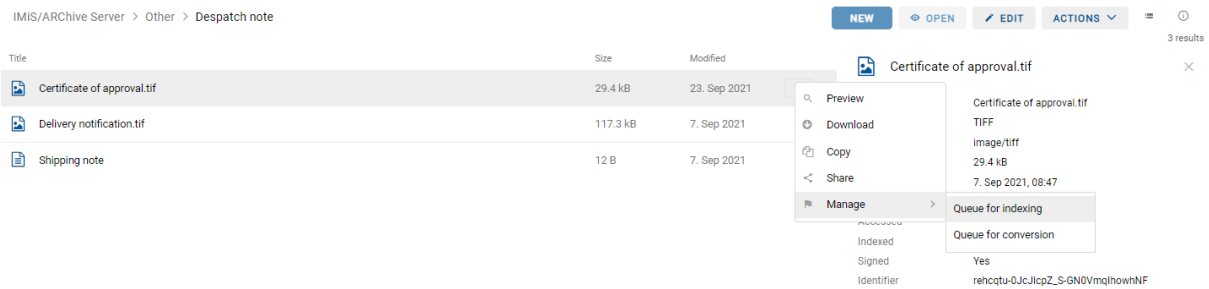


Image 218: Selecting the Queue for Indexing command

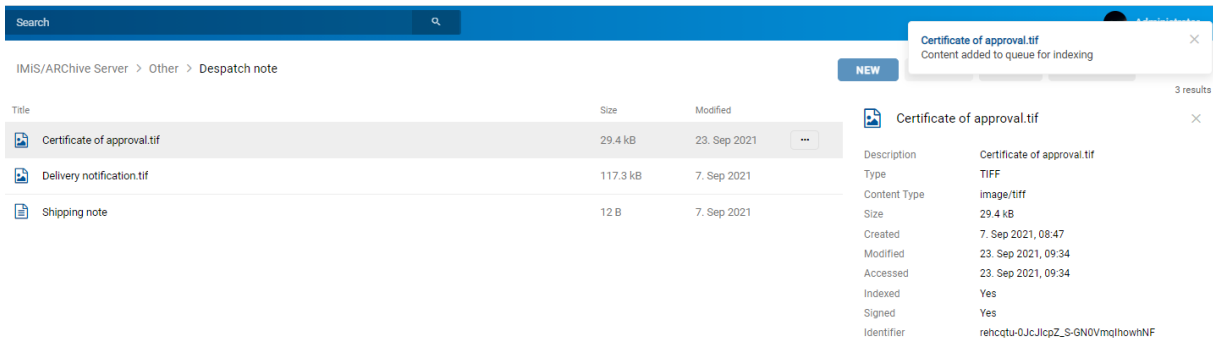


Image 219: Successful adding of content for indexing

4.3.5.14 Content conversion

The IMiS®/ARChive Server enables automatic content conversion. All newly added content can be automatically converted to a long-term storage format after being stored according to the setting in the server configuration (PDF/A, TIFF).

Example: A content created in Microsoft Word that is attached to the document must be converted into the PDF/A file type to ensure long-term storage.

For better visibility, the converted content is displayed in a tree. Content can also be multi-level and enable a view of the conversion history. The conversion of content can be done automatically with the appropriate settings on the IMiS®/ARChive Server or manually for an individual content within the interval specified in the server settings.

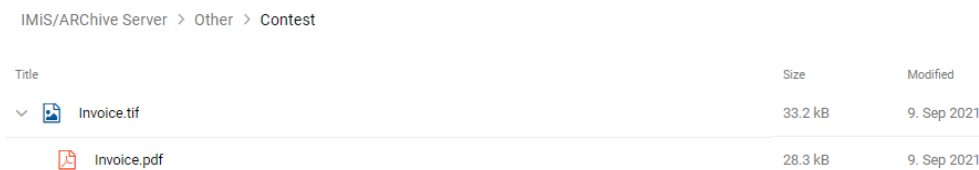


Image 220 Example of automatically converting content on a list

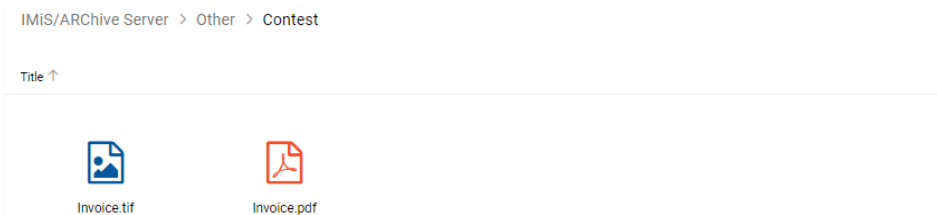


Image 221: Example of automatically converting content in grid view

For the manual tagging of content for conversion the user must have the ContentManagement role.

By selecting the popup menu on the tagged content in the document reading mode (Open), the user can select the “Manage” command. By confirming the “Queue for Conversion” command, the selected content is tagged for later conversion.

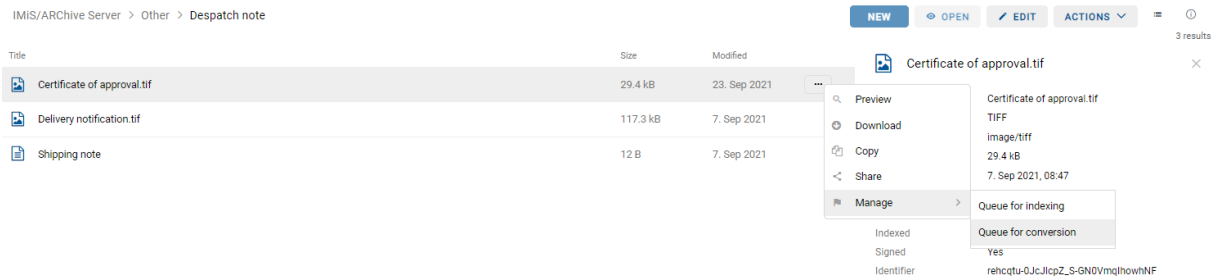


Image 222: Selecting the Queue for Conversion command

The user is informed of successfully tagging the content for later conversion.

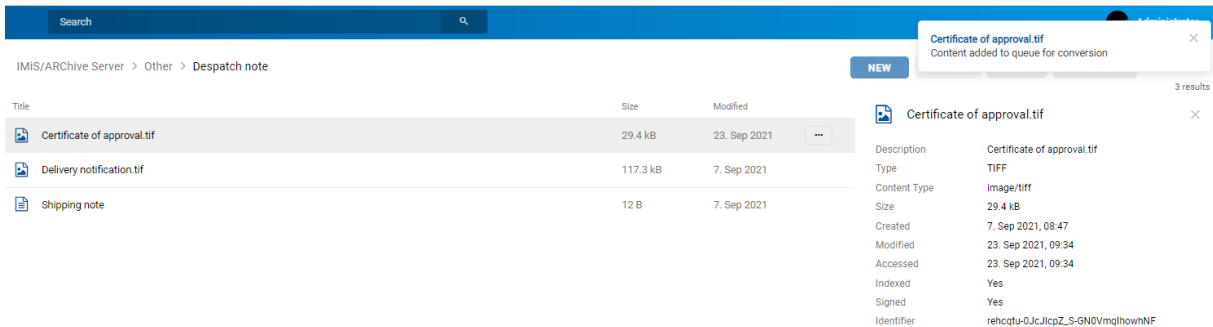


Image 223: Successful tagging of content for later conversion

4.3.5.15 Detaching content

In edit mode the user has the option of detaching the selected converted content.

The user with the Write permission can perform the detachment.

In edit mode the user selects the content. In the popup menu the user selects the Detach command.

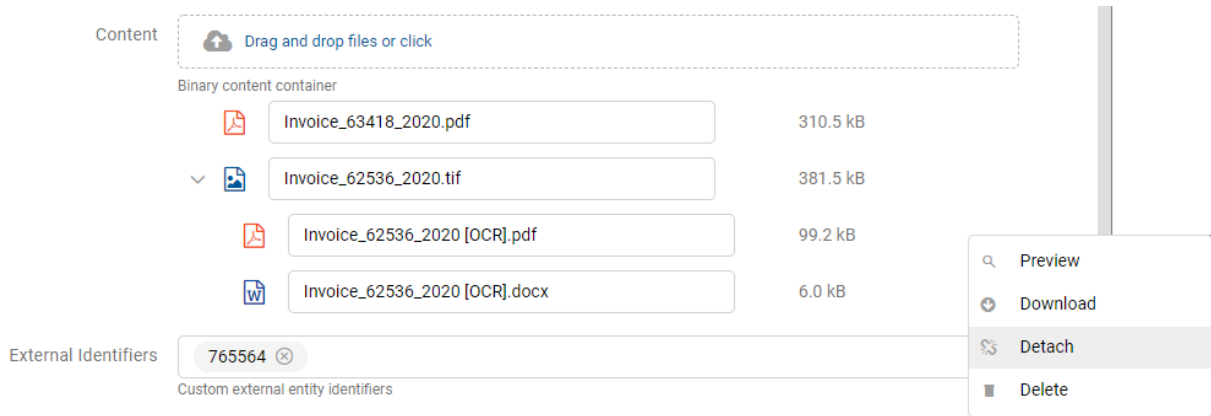


Image 224: Detaching the selected converted content

The detachment is not executed until confirmed with the Save command.

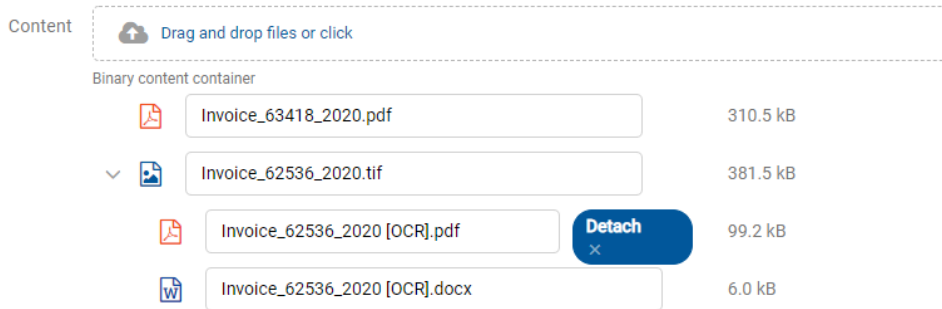


Image 225: Tagging content for detachment

After confirming the detachment of converted content, the selected content is classified under the last content on the list.

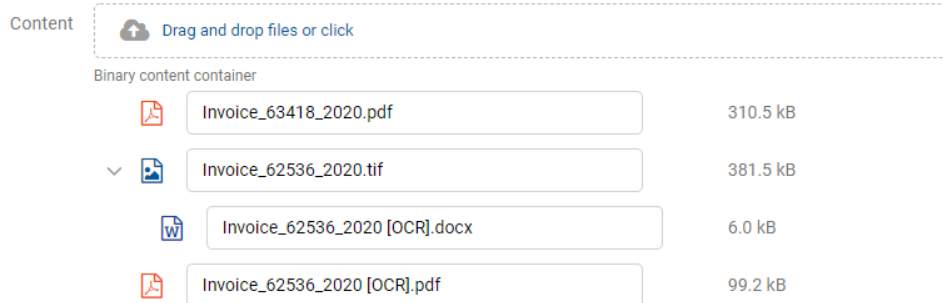


Image 226: Displaying detached content on the list

***Warning:** Removal of source content is possible only after a prior removal of all interpretations of the content. While removing content at individual levels, the entity must be saved.*

4.3.6 Versioning

The user is enabled the versioning of the values of document attributes. The properties that have been modified in individual document versions can be reviewed only on templates that enable versioning. The basic condition is that the template attribute has been marked as “versionable”.

This functionality is supported in IMiS®/ARChive Server version 9.9 or higher.

For more information see chapter [Versioning in the IMiS®/ARChive Server Manual](#).

4.3.6.1 Creating new version

By selecting the action “New version” in the popup menu on the “Actions” button in the command bar or on the document selected from a list, the user is shown a dialog box with the relevant tabs and set of attributes.

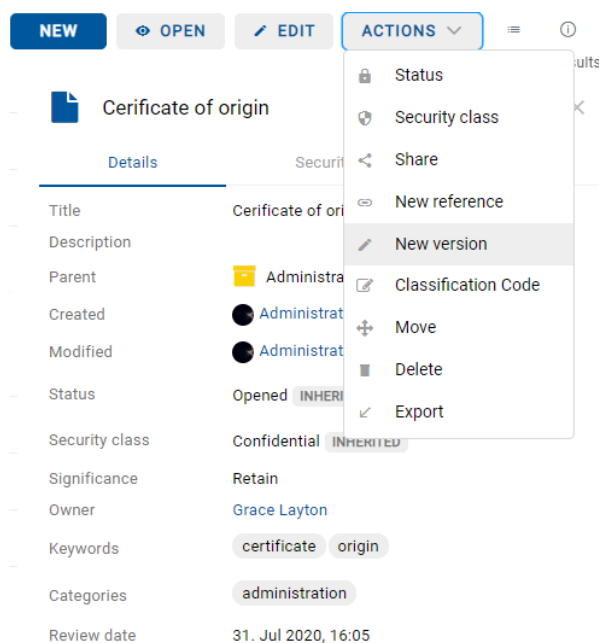


Image 227: Selecting the action “New version” in the popup menu

In the Details tab the following attributes are available to the user:

- Version: selecting a document version. The available options are:
 - Major: signifies major changes to the document.
 - Minor: signifies minor changes to the document.
 - 3rd level: signifies minimum changes to the document.
 - 4th level: signifies the smallest changes to the document.
 - Overwrite: overwrites the existing document version.
- Comment: a comment to the document version.
- Title: the name of the document. This attribute is mandatory.
- Description: a short description of the document.
- Significance: a set of available document significances.
- Owner: the directory entity (user or group) that is responsible for the selected document version (owner).

- Keywords: document-related keywords. This attribute can have multiple values.
- Categories: a collection of document categories.
- Content: document contents.
- External identifiers: a list of the unique external identifier of the document version on the server.

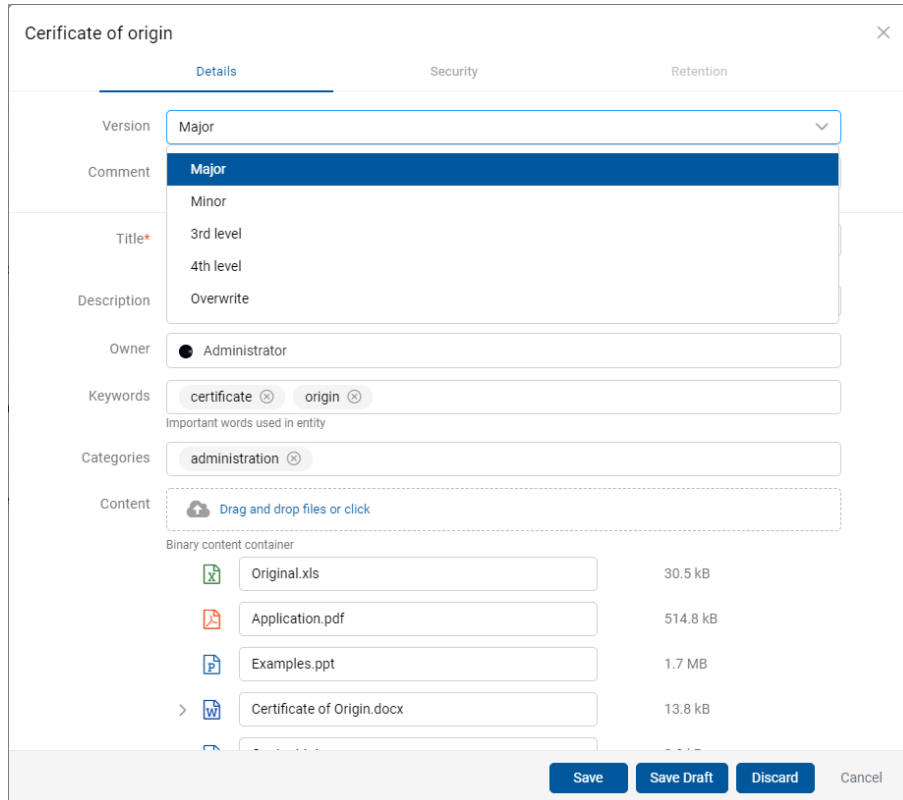


Image 228: Checking out a document version

The user confirms the checking out of a new document version with the Save command or cancels it with the Cancel button.

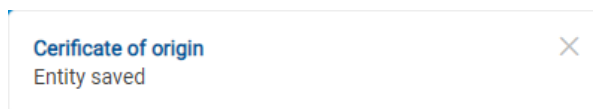


Image 229: Information about saving a document version

Note: While creating a document version, the source document is available to other users only in read-only mode.

4.3.6.2 Reviewing a document version

In the preview mode and open mode, the user can review document versions in the set Versions in the Details tab in the right view.




Image 230: Displaying document versions in the set Versions

Note: The last saved document version is placed at the top of the view. The selected document version is marked in blue.

4.3.6.3 Editing document version

The user can edit only the values of attributes to which he has the appropriate access rights.

By selecting the icon  on the document version record, the user can choose from the following options in the popup menu:

- Open: opens the selected document version in the reading mode.
- Edit: opens the selected document version in the editing mode.
- New version: creates a new version of the document via a dialog box.
- Delete: deletes a document version.

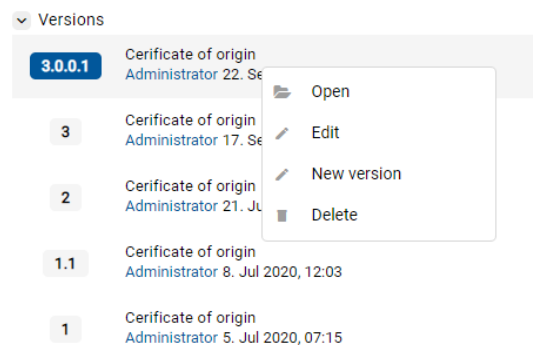


Image 231: A popup menu on the document version

In edit mode the user can change the attribute values.

Image 232: Opening a document version in editing mode

Note: When editing the document version, the values of attributes with the property Versionable will apply only to this version. By changing the values of attributes that do not have this property, the changed values will be saved in all previous versions of the document.

The user can delete an individual version of the document or the versioned document by removing every single version.

4.3.6.4 Creating draft

If the user wants to check in a document version at a later time, he can save it temporarily with the command Save as draft.

Note: While preparing and creating a draft, the value of the draft attribute "Owner" changes to the current user. Thus, the document owner differs from the draft owner.

Depending on the settings for access permissions to the attribute of the directory entity type "sys:Owner", it is possible that the document owner will not see the draft in the Drafts folder but will see it on the list of entities.

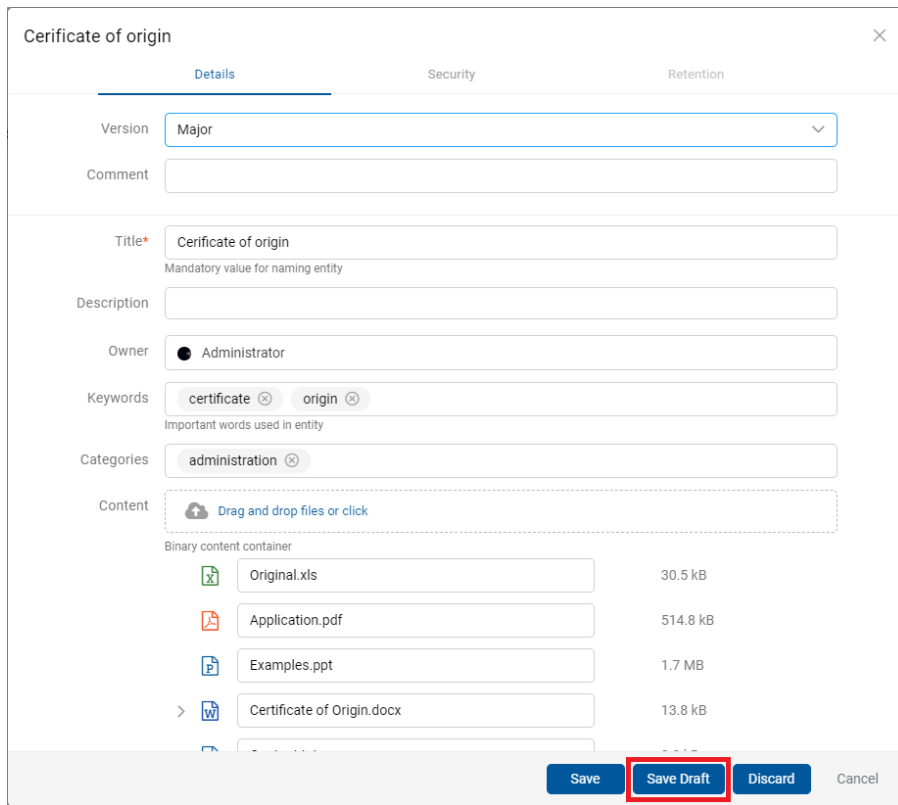


Image 233: Saving a draft for later editing

By selecting the Drafts folder, the left view shows a list of drafts of document versions. The user can review information about the selected document version with the Open command, edit the document draft with the Edit command and remove the draft with the Discard command.

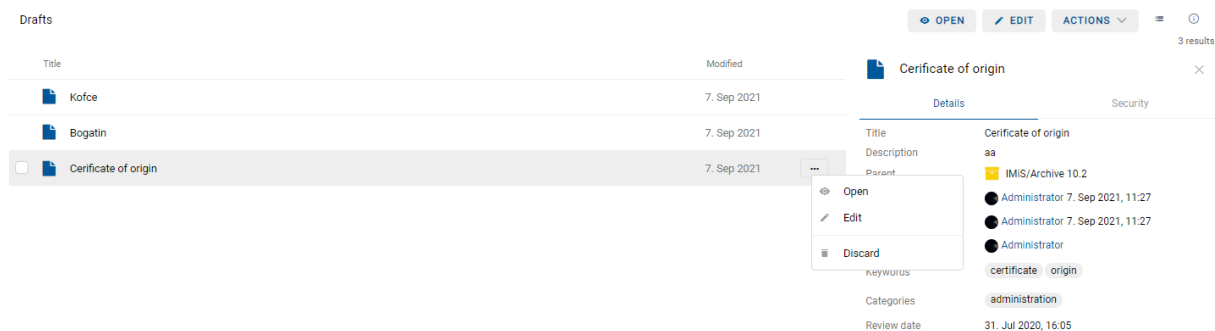



Image 234: A draft of a document version in the Drafts folder

Note: by selecting the  icon, the user defines which columns will be displayed in the review of deleted entities. The user can check or uncheck Description and Modified. The Title of the draft is mandatory.

The created draft is recorded in the list of versions in the section Versions in the display of entity information. The user has the option of opening, editing and discarding the draft.

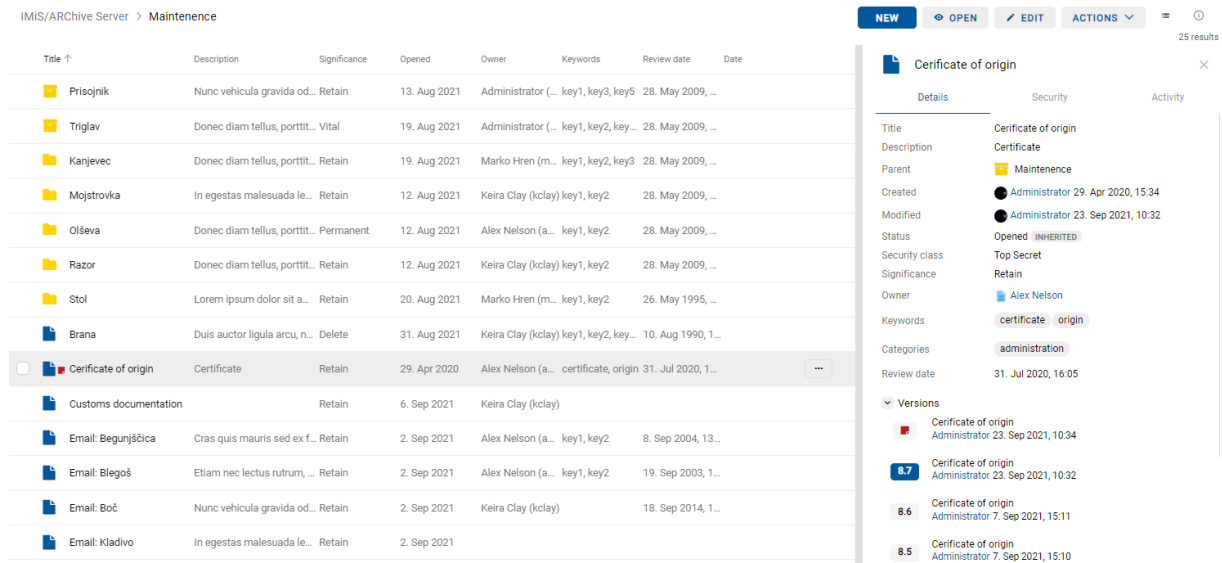


Image 235: Displaying the draft in the list of versions

4.3.6.5 Discarding draft

The user can discard a document draft with the Discard command, thus destroying it.

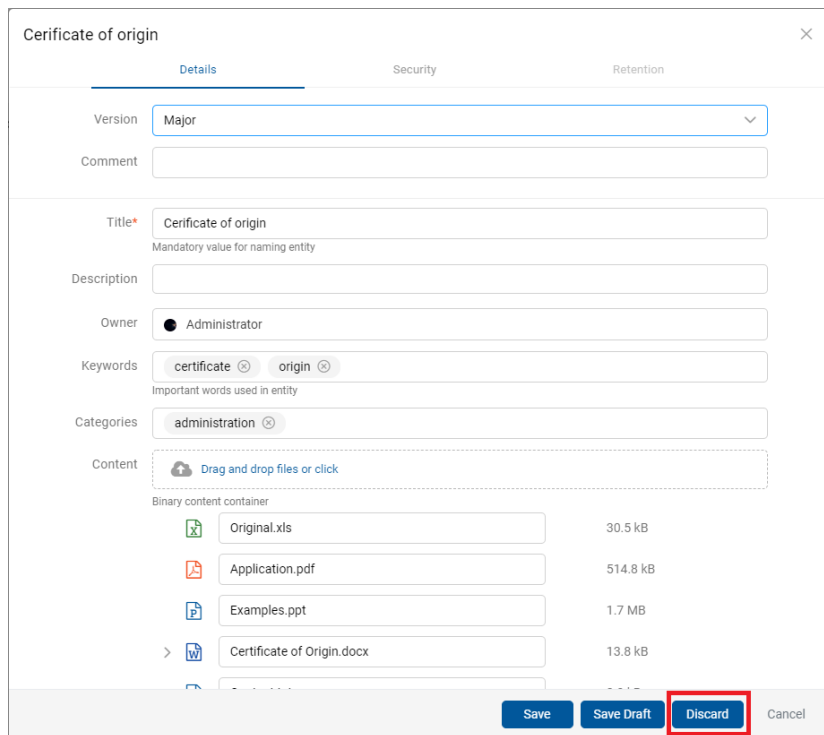
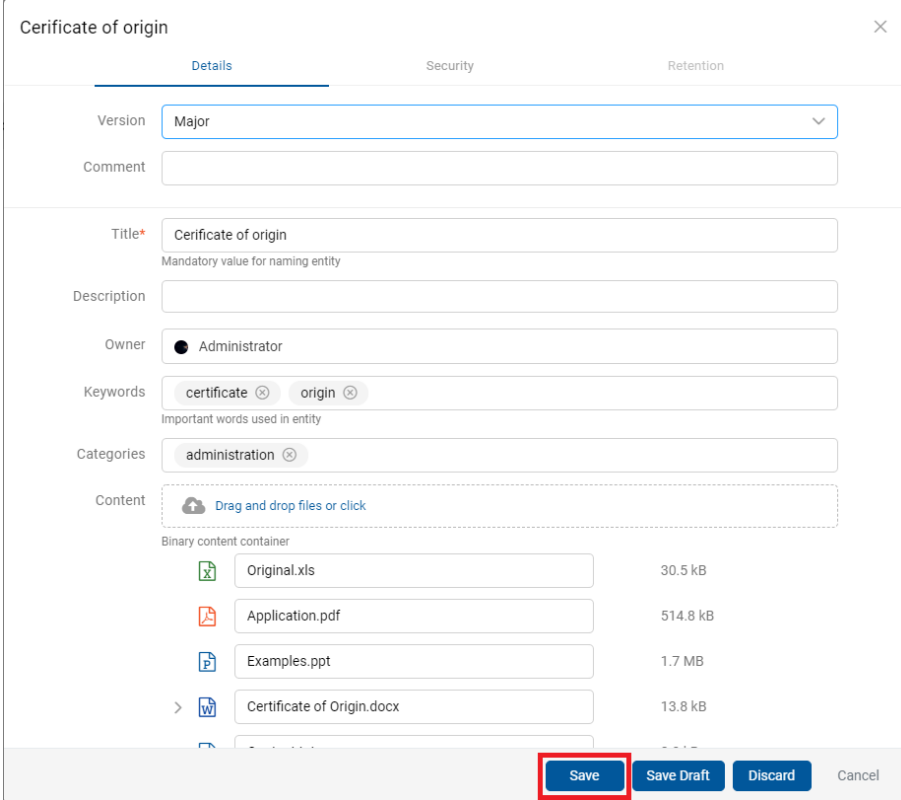


Image 236: Discarding a document draft with the Discard command

4.3.6.6 Checking in draft

The user checks in a version of a document saved in the Drafts folder by selecting the Save command in the bottom command bar.



Certificate of origin

Details Security Retention

Version: Major

Comment:

Title*: Certificate of origin
Mandatory value for naming entity

Description:

Owner: Administrator

Keywords: certificate, origin
Important words used in entity

Categories: administration

Content: Drag and drop files or click

Binary content container

File Name	Size
Original.xls	30.5 kB
Application.pdf	514.8 kB
Examples.ppt	1.7 MB
Certificate of Origin.docx	13.8 kB

Save Save Draft Discard Cancel

Image 237: Reviewing a draft before checking it in with the Save command

After checking in the draft, the user is redirected to the display of the parent document, a version of which was created by checking in the draft.

4.3.7 Search functions

The IMiS®/ARChive Server enables users to search by:

- Metadata of the class, folder and document.
- Actual value of the content metadata.
- Full text of the content attached to the document.
- Title of content contained by the document.
- Metadata and full text of content, simultaneously.

Users may only search entities they are authorized to access. Search functions are available for the selected entity, or the entire server archive.

The search engine is made up of two sets:

- Recent
- Advanced.

Recent

If the user has previously performed searches, the search history is shown by selecting the search box in the section “Recent”. The list contains only the last 5 searches, while older searches are saved to the user profile (chapter [The Search history tab](#)).

The user has the option of deleting the search history with "Remove".

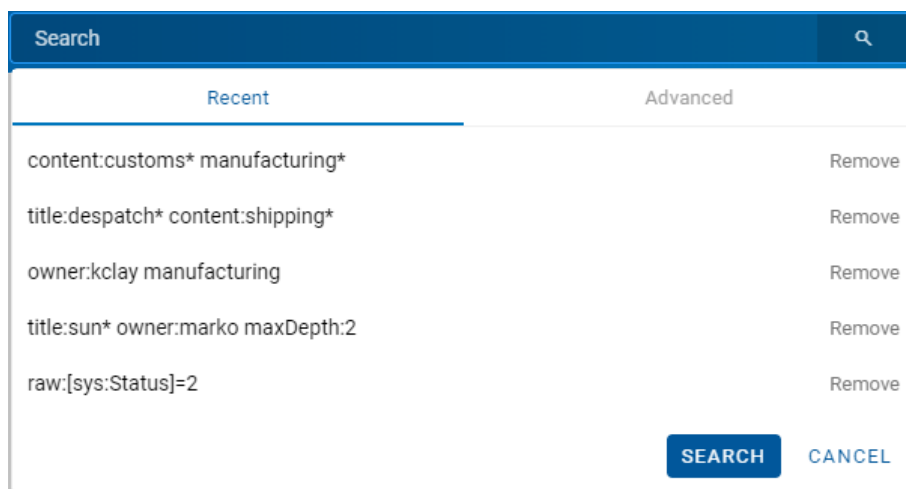


Image 238: Search history

Advanced

The user performs a new search by first selecting the search box. By entering values in the relevant boxes in the section “Advanced” in the dialog box, the user defines the search conditions. The search begins by selecting the action “Search”.

If the user first selects one of the last 5 searches in the section “Recent” and then the section “Advanced”, the search conditions for the selected search appear. These can be modified or supplemented if need be.

The image shows a search settings dialog box with the following fields and options:

- Search** (header)
- Recent** / **Advanced** (tabs)
- Type filter text** (input field)
- Scope**: Search for entity...
- Recursive**:
- Max depth**: (input field)
- Full text search**: (input field)
- Title**: (input field)
- Include**: Classes Folders Documents
- Owner**: (input field)
- Keywords**: (input field)
- Important words used in entity**: (input field)
- Date modified**: Any time (dropdown)
- Content description**: (input field)
- Review date**: After Before
- The review date log**: (input field)
- String 200**: (input field)
- String 10**: (input field)
- Date**: After Before
- Directory**: (input field)
- Search** (button) **Cancel** (button)

Image 239: Advanced search settings

The setting for the selected tab in the search box is saved to the user settings.

After refreshing the page, the last selected tab is shown in the search box.

In the [settings.json](#) file the user with permission can disable the entry of text in the search box, thus enabling only entry in the fields under the tab “Advanced”.

The entry field can be disabled under [search.input_enabled](#) (the default value is “True”).


The default settings for hiding and displaying the order of attributes in the search are defined in the file [settings.json](#), where they can be defined in the elements [search.profiles](#) and [search.views](#).

search.profiles	Description
Id	Profile identifier.
Attributes	Collection of attributes.
filter_type	Type of attribute filter. The set of values: <ul style="list-style-type: none"> - <i>Include</i>: certain attributes will be displayed. - <i>Exclude</i>: certain attributes will not be displayed.

Table 12: Setting a collection of profiles

search.views	Description
profile	Profile identifier from search.profiles.
archives	Collection of archive identifiers.
members	Collection of directory entities.
editable	Defines whether the search view can be edited. The set of values: <ul style="list-style-type: none"> - <i>true</i>: The user modifies the view which is saved to the user settings. Default value. - <i>false</i>: Disables editing the view.

Table 13: Setting the search view

By selecting the icon , a dialog box opens for setting the attributes for defining the custom search conditions. In the menu, the user is offered both the system attributes and the custom attributes.

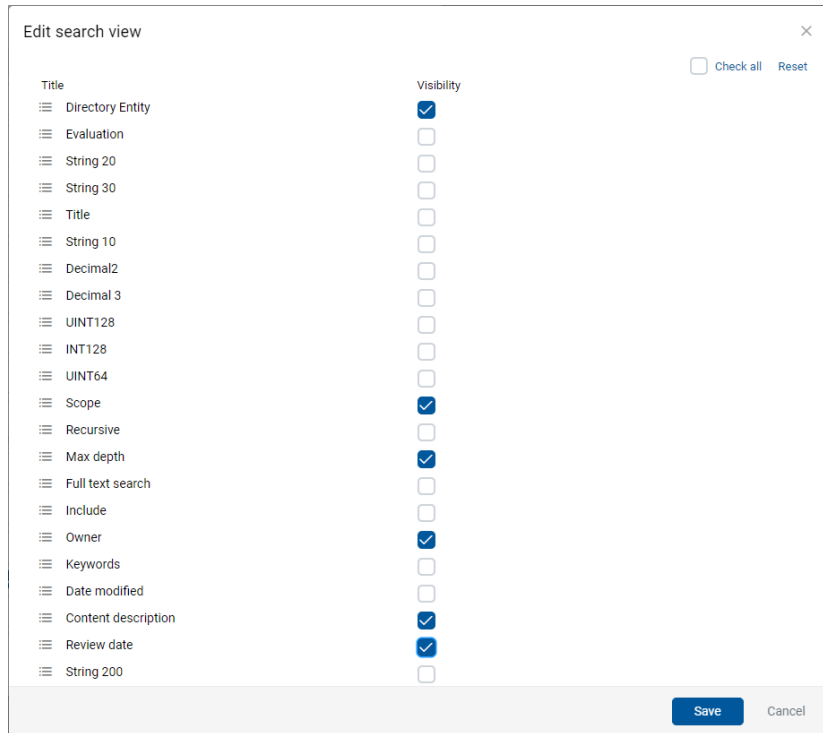



Image 240: Setting the attributes to define the search conditions

By moving the icon  in front of the title of the attribute for defining the search conditions up or down, the user defines the sequence of the display of attributes in the search dialog box.

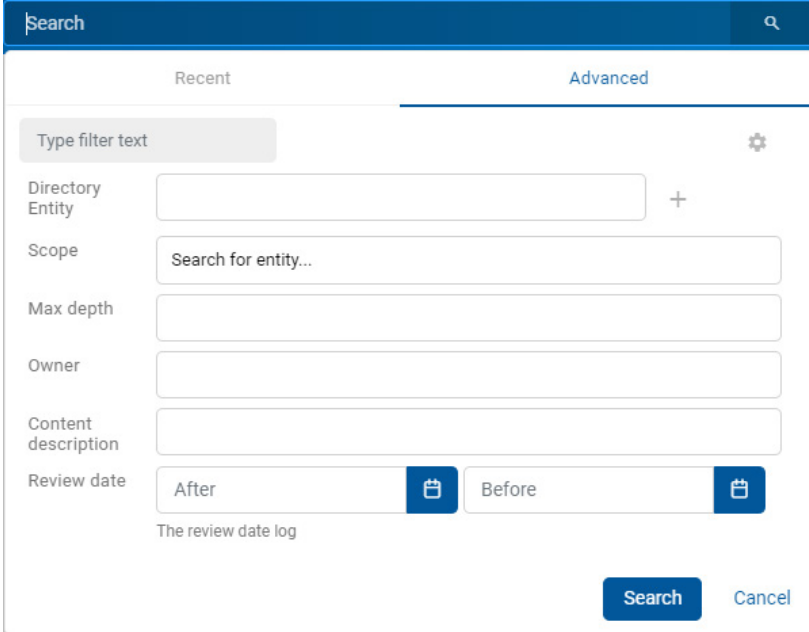
The user has the option of defining a single description for all selected entities.

By checking the checkbox, the user can check or uncheck all attributes for defining the search conditions simultaneously ("Check all").

The user selects "Reset" for the default display settings.

By confirming the selection ("Save"), the display settings are saved to the user profile and the set of displayed attributes for defining the search conditions is adjusted accordingly.

By selecting the "Cancel" button, the settings are not saved.



The screenshot shows a 'Search' window with two tabs: 'Recent' and 'Advanced'. The 'Advanced' tab is selected. At the top, there is a 'Type filter text' input field with a gear icon to its right. Below this, there are several search criteria fields: 'Directory Entity' with an empty text box and a '+' icon; 'Scope' with a text box containing 'Search for entity...'; 'Max depth' with an empty text box; 'Owner' with an empty text box; and 'Content description' with an empty text box. At the bottom, there is a 'Review date' section with two radio buttons: 'After' (selected) and 'Before', each with a calendar icon. Below the radio buttons is the text 'The review date log'. At the bottom right, there are 'Search' and 'Cancel' buttons.

Image 241: Displaying the set of attributes for defining the search conditions

The user has the option of filtering the attributes for defining the search conditions. By entering text in the Type filter text field, the set of displayed attributes is limited accordingly.

***Example 1:** The user previously searched by the value of the attribute Full text search = STATE DEPARTMENT. The user enters the search string "sc" in the Type filter entity field. The set of attributes which will be searched is limited to attributes with titles containing the search string "sc". Additionally, the set of attributes for the search also contains the attribute Full text search with the value STATE DEPARTMENT.*

The image shows a search dialog box with the following fields and settings:

- Search** (Title bar)
- Recent** / **Advanced** (Tabs)
- Type filter text**: (Empty text input)
- Include**: CLASSES, FOLDERS, DOCUMENTS
- Scope**:
- Recursive**:
- Max depth**:
- Title**:
- Full text search**:
- Content description**:
- Owner**:
- Date modified**:
- SEARCH** and **CANCEL** buttons

Image 242: Before entering the text of limiting the set of attributes for the search

The image shows the same search dialog box as in Image 242, but with the following changes:

- Type filter text**: (This field is highlighted with a red border)
- All other settings (Include, Scope, Recursive, Max depth, Title, Full text search, Content description, Owner, Date modified) remain the same.
- SEARCH** and **CANCEL** buttons are at the bottom right.


Image 243: After entering the text of limiting the set of attributes for the search

Example 2: Building on the previous example, the user removes the value GENUINE from the field for entering the value of the attribute Full text search. The user reenters the search string “sc” in the Type filter entity field and performs the search. The set of displayed attributes which will be searched is additionally limited to attributes with titles containing the search string “sc”.



Image 244: Example of limiting the set of attributes for the search

4.3.7.1 Full text search

The user begins searching the full text of the content by entering a search string in the Search field in the header of the user interface. The user confirms it by selecting the icons , which denote a search or “Enter” on the keyboard.

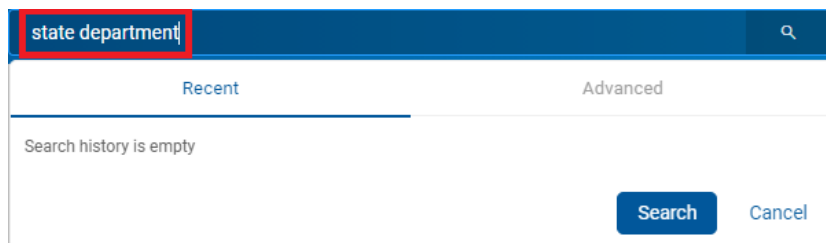


Image 245: Entering a search string in the Search field

An alternative way of searching the full text of the content is by selecting the Search field in the header of the user interface, selecting the section “Advanced” in the Search dialog box and entering the search string in the »Full text search« field in the »Search« dialog box.

The screenshot shows the 'Search' window with the 'Advanced' tab selected. At the top, there are tabs for 'Recent' and 'Advanced'. Below them is a 'Type filter text' field with a gear icon. The 'Scope' field contains 'Search for entity...'. The 'Recursive' checkbox is checked. The 'Max depth' field is empty. The 'Full text search' field is highlighted with a red border and contains the text 'state department'. Below it are fields for 'Title', 'Include' (with buttons for CLASSES, FOLDERS, and DOCUMENTS), 'Owner' (set to Grace Layton), and 'Keywords'. At the bottom right are 'SEARCH' and 'CANCEL' buttons.

Image 246: Entering a search string in the Full text search field

The user has the option of filtering the attributes whose values will be used for the search. By entering text in the Type filter entity field, the set of displayed attributes is limited accordingly.

This screenshot shows the same 'Search' window. The 'Type filter text' field at the top now contains the letter 's'. The 'Full text search' field is now empty. The 'Recursive' checkbox remains checked. The 'Include' buttons are still visible. The 'Search' and 'Cancel' buttons are at the bottom right.

Image 247: Entering text to limit the set of attributes for the search

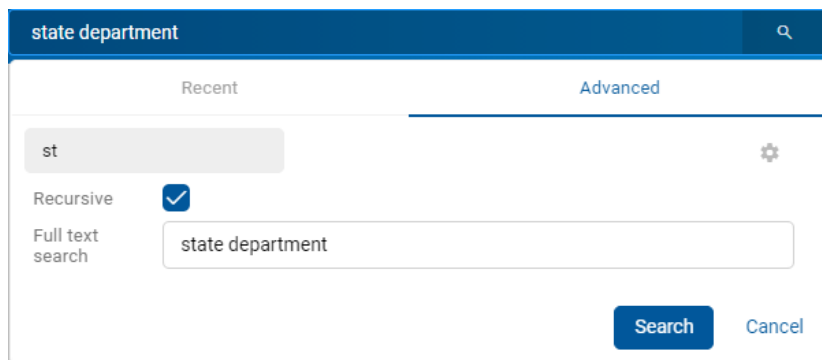


Image 248: Example of limiting the set of attributes for the search

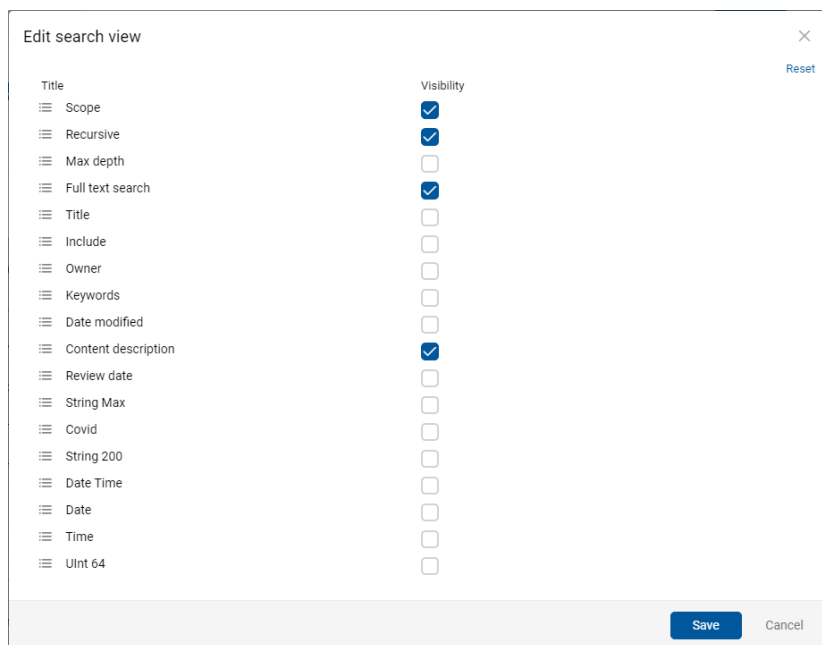


Image 249: Limiting the set of attributes for the search via the menu

After confirming the search, the user is shown the search results list in the central view. For each document containing content with the search string all versions of the content are shown with their titles, content type and icon.

By selecting the title (version) of the content, the document opens and shows the contents in preview mode.

The screenshot shows the IMIS/wClient interface with a search results list. The search criteria is 'state department'. The results are for 'IMIS/ARChive Server' and are sorted by title. The list includes various document versions such as 'patras', 'IMIS_ARChive_Server_Prirocnik_v10.1.2010.docx', and 'General Instructions for Processing Personnel Actions.pdf'.

Title ↑	Creator	Owner
patras	Administrator (admin)	Marko Hren (marko)
2 IMIS_ARChive_Server_Prirocnik_v10.1.2010.docx		
2 IMIS_ARChive_Server_Prirocnik_v10.1.2010.pdf		
2.0.0.1 IMIS_ARChive_Server_Prirocnik_v10.1.2010.docx		
2.0.1 IMIS_ARChive_Server_Prirocnik_v10.1.2010.pdf		
3 IMIS_ARChive_Server_Prirocnik_v10.1.2010.docx		
3.1 IMIS_ARChive_Server_Prirocnik_v10.1.2010.docx		
3.1.1 IMIS_ARChive_Server_Prirocnik_v10.1.2010.docx		
4 IMIS_ARChive_Server_Prirocnik_v10.1.2010.docx		
1 General Instructions for Processing Personnel Actions.pdf		

Image 250: Search results list showing content versions

The user can create a search string from one or multiple simple search conditions. When searching by the full text of the document content, an exact match to the metadata value is not necessary. For more information on searching by partial values see chapter [Wildcard search](#).

Formats supported by the full text search function are:

- HTML, XML and similar formats.
- Microsoft Office, OpenOffice and iWork formats.
- RTF format.
- PDF format.
- Text formats.
- Audio format metadata (metadata of WAV, MIDI, MP3, MP4, OGG).
- Image format metadata (metadata of BMP, GIF, PNG, PSD; EXIF for JPEG, TIFF).
- Video format metadata (metadata of FLV, MP4).
- Email formats (PST, MBOX, EML).
- PKCS7 formats.
- Electronic publication formats (EPUB, FB2).
- Web feed and news formats (RSS, ATOM, IPTC, ANPA).

- DWG format.
- CHM format.
- Font formats (TTF, AFM).
- Scientific formats (HDF, NETCDF, MAT).
- Program and library formats (ELF, PE).
- Compression formats (TAR, CPIO, ZIP, 7ZIP).

4.3.7.2 Searching by Metadata

The user can search by metadata by first selecting the field for entering the search string in the header of the user interface. In the “Search” dialog box in the section “Advanced”, the user has the following fields available:

- Scope: the entity under which the search will be implemented.
- Recursive: checking this parameter means that the search is implemented on the selected entity and on all contained entities. On the contrary, by unchecking this parameter, the user limits the search to the selected entity and the 1st level of contained entities.
- Max depth: the numerical value defines the maximum search depth.

Example: Setting the value “Search depth = 2” means that the search will be performed up to and including level 2 of the selected entity tree.

- Full text search: searching by the text of the content.
- Include: the type of entity for which the search will be performed. All entity types – documents, folders and classes are set by default. If all types or none are selected in the search dialog box, all entities are searched.
- Title: name of the entity.
- Owner: owner of the entity.
- Keywords: keywords related to the entity.
- Date modified: date of the last entity modification.

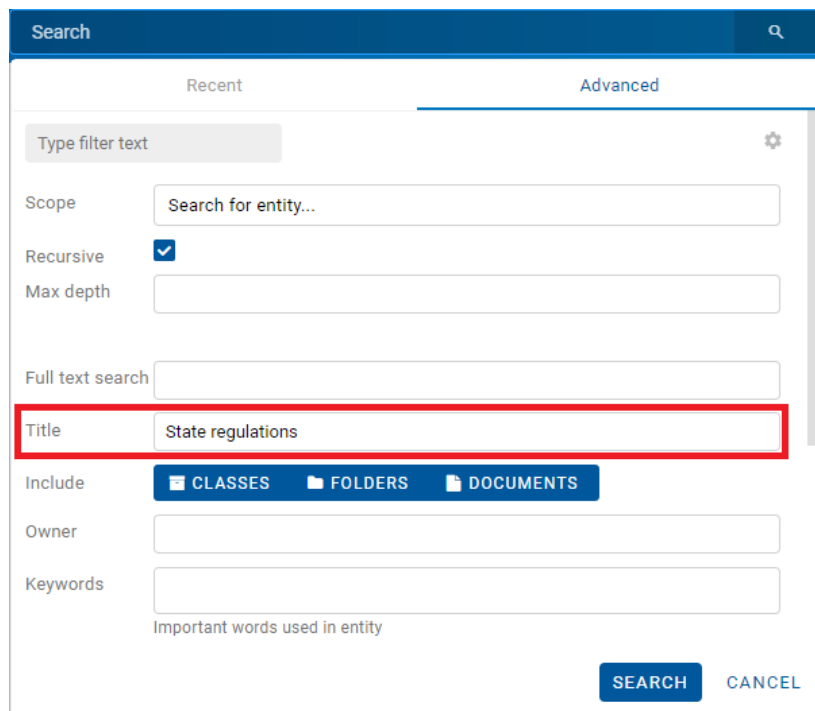


Image 251: A dialog box for searching by metadata

Besides the above-mentioned attributes, the user can also search by Custom attributes. The set comprises the attributes which are used in at least one entity.

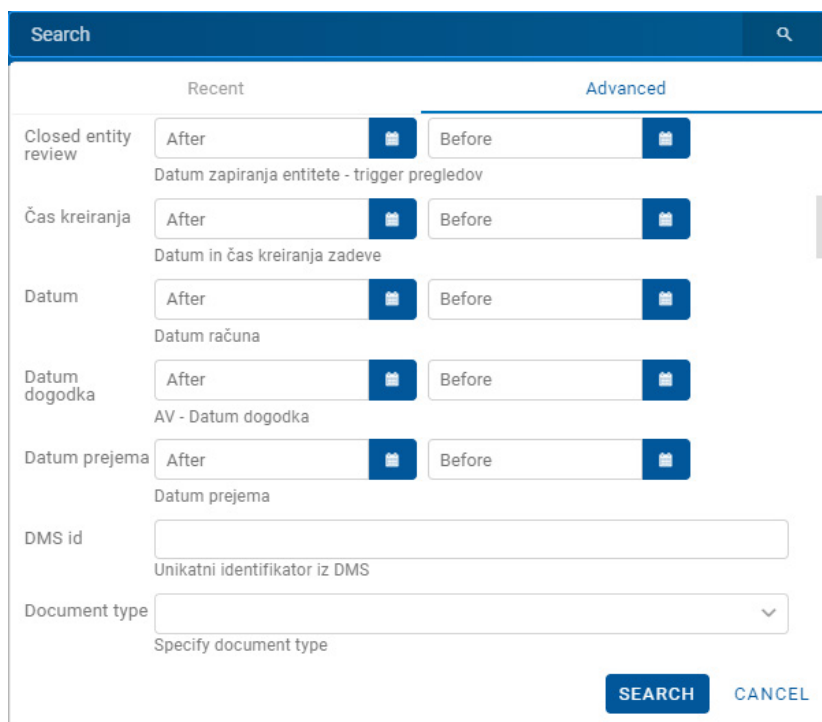
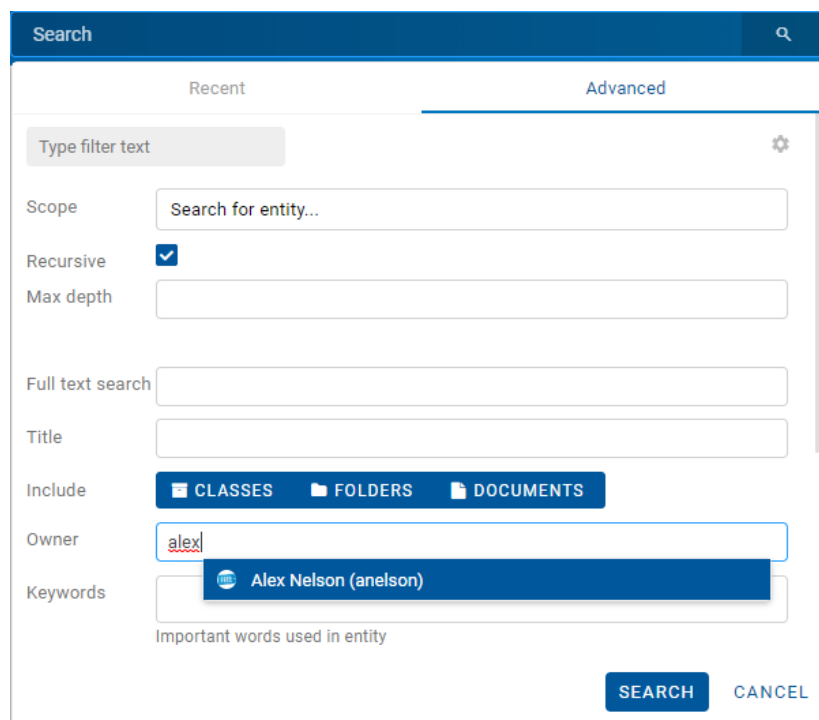


Image 252: A dialog box for searching by custom metadata

When choosing text metadata, the value must be entered. When searching text metadata, the value does not have to be identical. For more information on searching by partial values see chapter [Wildcard search](#).

When searching metadata whose value is represented by the name of an IMiS®/ARChive Server user (for example the metadata Owner) the search string must be identical to the value of the metadata.


Instead of manually entering the title of the owner into the search string, the user selects it from the set of available users. To start the search, it is enough to enter two characters from the search string.



The image shows a 'Search' dialog box with the following fields and options:

- Search** (Title bar)
- Recent** / **Advanced** (Tabs)
- Type filter text** (Input field with gear icon)
- Scope** (Dropdown menu: Search for entity...)
- Recursive** (Checked checkbox)
- Max depth** (Input field)
- Full text search** (Input field)
- Title** (Input field)
- Include** (Buttons: CLASSES, FOLDERS, DOCUMENTS)
- Owner** (Input field: alex, Dropdown: Alex Nelson (anelson))
- Keywords** (Input field)
- SEARCH** / **CANCEL** (Buttons)

Image 253: A dialog box for searching by the metadata Owner

When searching by date, the user selects the icon  or field for defining the value. From the list, the user selects the appropriate date and time of the start and/or end of date validity. For more information on the date and time format that will be shown in the date fields, see chapter [Entering metadata entry](#).

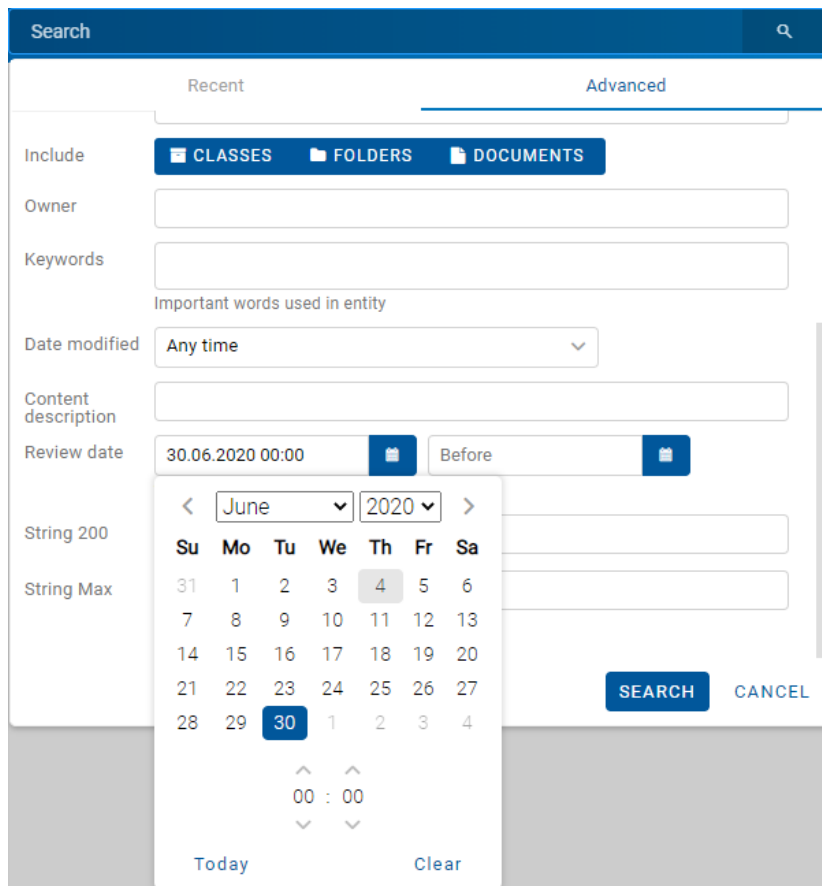


Image 254: Defining the time range for searching by date

4.3.7.3 Searching by Content descriptions

The user searches by the document content by first selecting the field for entering the search string in the header of the user interface. In the “Search” dialog box in the section “Advanced”, the user enters the search string into the Content description field.

Image 255: A dialog box for searching by the content description

4.3.7.4 Wildcard search

The IMiS®/wClient also allow you to perform a Wildcard search by using special characters in the search string:

- “ * ” means zero or more characters of any kind
- “ ? ” means any character.

Image 256: Use of special characters in a search string

Example:

If the user is searching entities by the Title metadata, the search string:

- *"a*"* searches for entities whose title starts with the letter "a".
For example, producing: "aa", "Administration", "authorization", "A-test" and "Auto Service".
- *"*traffic*"* searches for entities that have a string of characters "traffic" in the title.
For example: "traffic light", "havy traffic", "road traffic jam".
- *"*en"* searches for entities whose title ends with a string of characters "en".
For instance: "then", "when", "hen", "maiden".
- *"d?b"* searches for entities whose title has a specified first and third letter (in this case "d" and "b"), while the second letter and all other letters can be random.
For example, producing: »debate«, "Debit", "dab" or "dubious claims"

Examples:

A user is searching for entities in the full text of the content. Based on the search string:

- ***test** returns an error. Such syntax is not allowed.
- **te*st** finds all document contents with words beginning with "te" and ending with "st" (i.e. telephonist, terrorist, ...).
- **te?t** finds all document contents in which the third letter of the word is unknown (i.e. test, text, ...).
- **test*** finds all document contents with the word »test« (i.e. tests, testing, ...).
- **test result** finds all document contents with words »test« or »result«.
The rule is that if there are no logical operators between the words, operator OR will be used.
- **test AND result** finds all document contents with words »test« and »result«. Logical operators must be written in uppercase.
- **test result** finds all document contents with words »test result« written in succession.
- **test result*** finds all document contents with words »test result« written in succession, with the possibility that the second word can also be longer (i.e. results, resultados, ...)

The search result is shown in the central view of the user interface.

4.3.7.5 Searching by actual value

The user searches by actual value by entering the search string in the search box in the header of the user interface. The search string can consist of one or multiple simple search conditions, beginning with the string “raw:”.

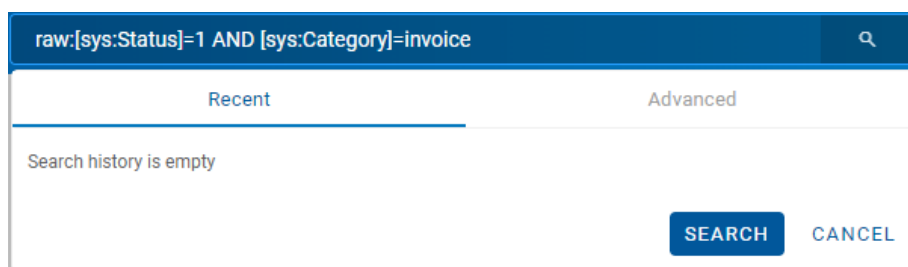


Image 257: The search string and the results of searching by actual value

4.3.7.6 Combined search

The user can also perform the following combinations of searches:

- By metadata and the full text of the content.
- By metadata and the content description.
- By the full text of the content and the content description.

The user performs a combined search by the title of the document content by first selecting the field for entering the search string in the header of the user interface. In the “Search” dialog box in the section “Advanced”, the user enters the search strings into the relevant fields.

Note:

The combined search takes the logical operator AND into account.

4.3.7.6.1 Combined search by Metadata and Full text search

The user can simultaneously search by metadata and by the full text of the content.

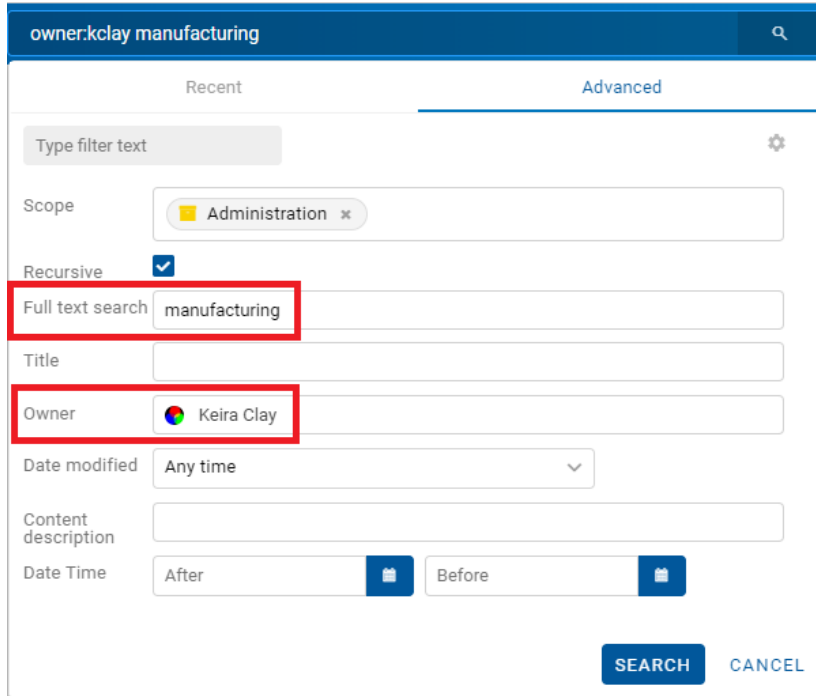


Image 258: Entering a search string in a combined search

The search result is all documents containing the searched metadata (e.g. Owner = Keira Clay) and whose content also contains the searched text (e.g. Full text search = manufacturing).

The searched text can contain one or multiple simple search conditions.

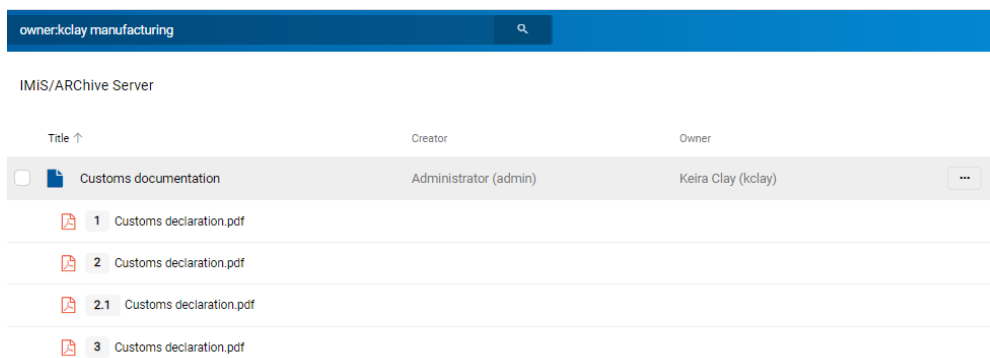


Image 259: Result of searching by metadata and the full text of the content

4.3.7.6.2 Combined search by Metadata and Content descriptions

The user can simultaneously search by metadata and by the content description.

The search result is all documents containing the searched metadata (e.g. Title = despatch*) and whose content descriptions also contain the searched text (e.g. *shipping*).

*Note: When searching for values by content description, the character * (asterisk) must be added before and after the searched value.*

The screenshot shows a search window with the following fields and values:

- Title:** despatch*
- Content description:** *shipping*
- Recursive:**
- Full text search:** (empty)
- Owner:** (empty)
- Keywords:** (empty)
- Important words used in entity:** (empty)
- Review date:** After (selected), Before

Image 260: Entering a search string when searching by metadata and the content description

title:despatch* content:*shipping*

IMiS/ARChive Server

Title ↓	Creator	Owner
Despatch note	Zoran Loncar (zoran)	Alex Nelson (anelson)
Shipping note		

Image 261: Result of searching by metadata and the content description

4.3.7.6.3 Combined search by Content descriptions and Full text search

The user can simultaneously search by the content description and by the full text of the content.

The search result is all documents containing a specific search string in the content description (e.g. Content descriptions = customs*) and whose content also contains the searched text (e.g. Full text search = manufacturing).

The searched text can contain one or multiple simple search conditions.

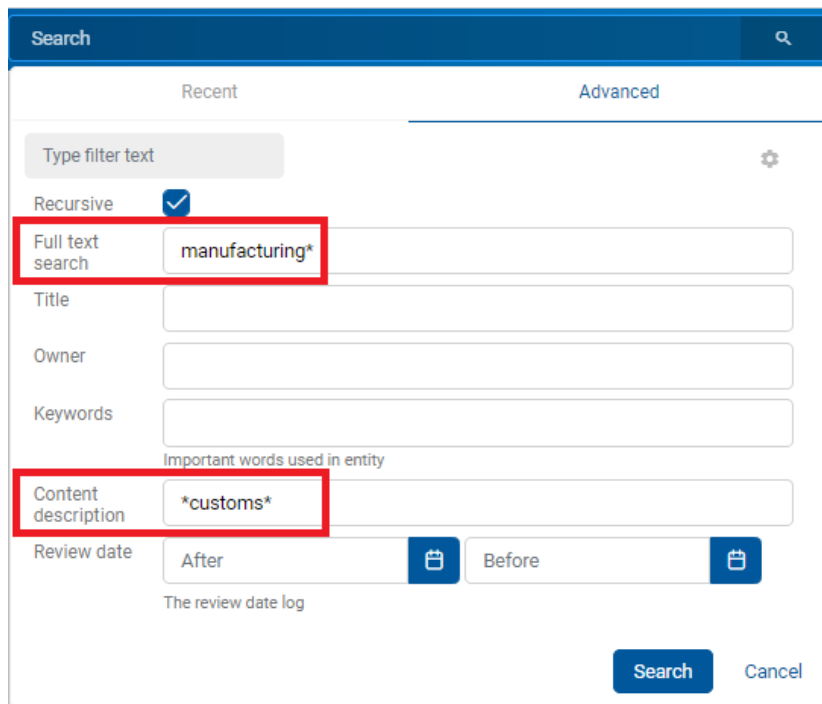


Image 262: Entering a search string when searching by the text of the content and the content description

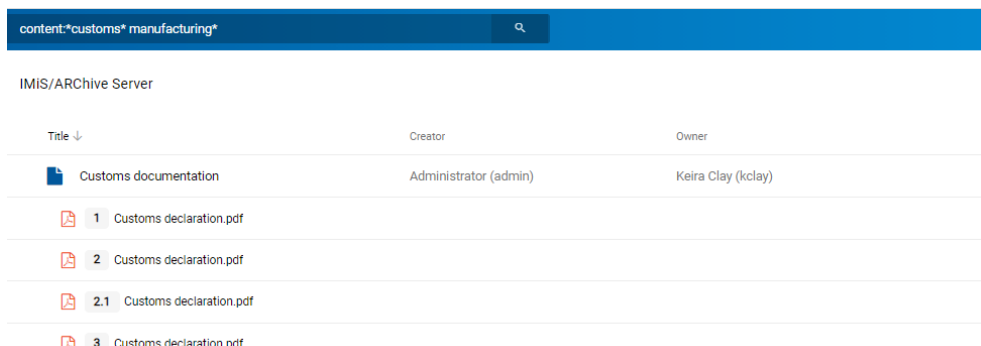


Image 263: Displaying the result of searching by the text of the content and the content description

4.3.7.6.4 Search by Custom metadata

The user performs a combined search by the title of the document content by first selecting the field for entering the search string in the header of the user interface.

The user searches by custom metadata by first selecting the field for entering the search string in the header of the user interface. In the “Search” dialog box in the section “Advanced”, the user enters the search string into the selected custom field.

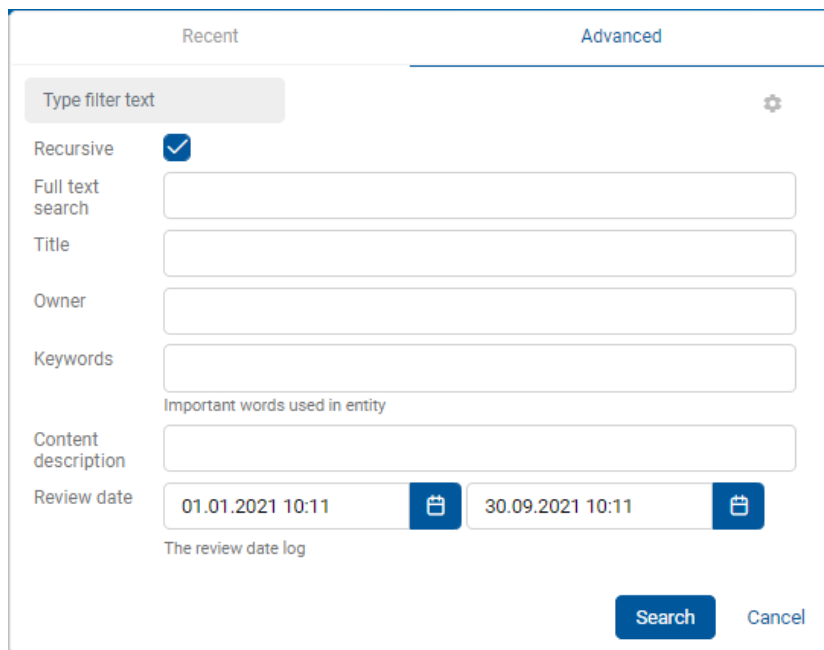


Image 264: Entering the search string when searching by a custom attribute

The search result is all the documents whose date values of the custom attribute “Review date” is between September 1st and September 30th 2021.

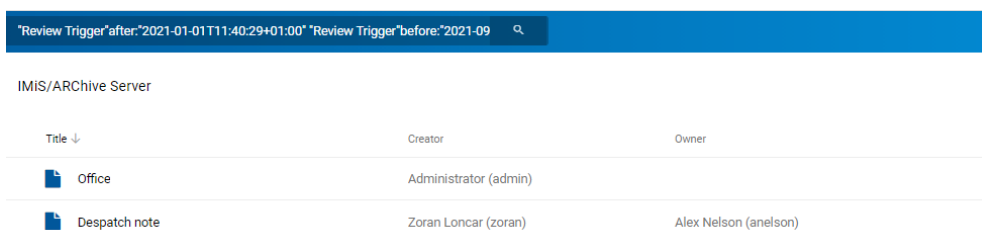


Image 265: Entering the search string when searching by a custom attribute

4.3.7.7 Searching Audit log events

By selecting the username or icon and the action Activity in the popup menu, a dialog box opens for searching for information on audit log events.

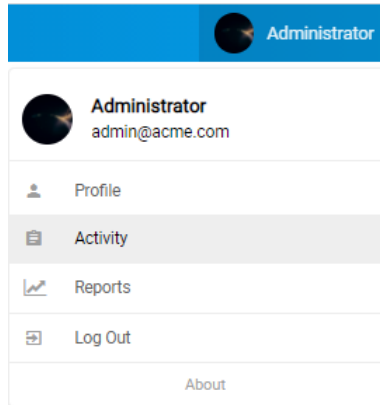


Image 266: Popup menu for reviewing audit log events

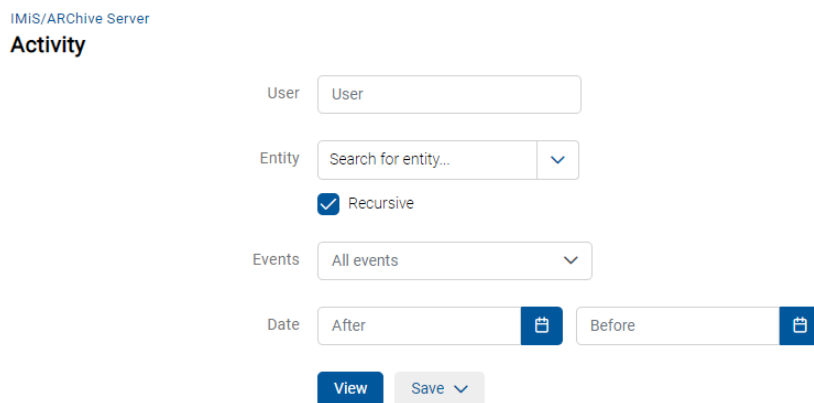


Image 267: Setting the parameters for searching audit log events

The user can specify the following settings:

- User: by entering the search string, the user selects the directory entity from the list to display information on selected audit log events.



Image 268: Selecting a directory entity from a list

- Entity: the user can select or define one of the following search modes based on which the information on selected audit log events will be shown:
 - Browse mode: selects an entity in the entity tree.

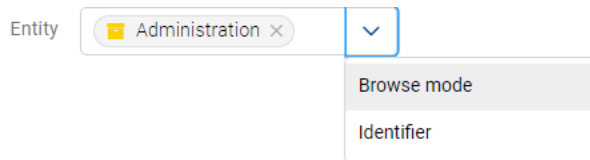


Image 269: Selecting an entity in the entity tree

- Identifier: defines a unique entity identifier on the server.

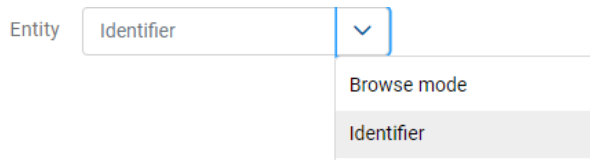


Image 270: Defining an entity identifier

- Recursive: checking this parameter means that the search is implemented on the selected entity and on all contained entities. On the contrary, by unchecking this parameter, the user limits the search to the selected entity and the first level of sub-entities.
- Events: selecting the audit log events for which the information will be displayed.

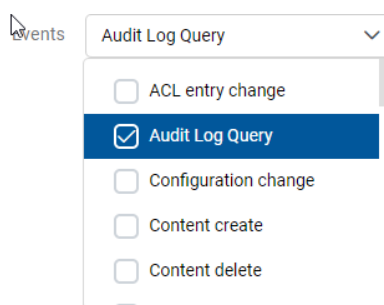


Image 271: Selecting audit log events

- After: start of the time period for displaying information on audit log events.

- Before: end of the time period for displaying information on audit log events.

Date

Image 272: Selecting the time range and save format of audit log events

By selecting the action View, a list of audit log events that match the search criteria is shown by pages.

By selecting the action Save, a popup menu appears with the possible formats (CSV, XML) for saving information on audit log events.

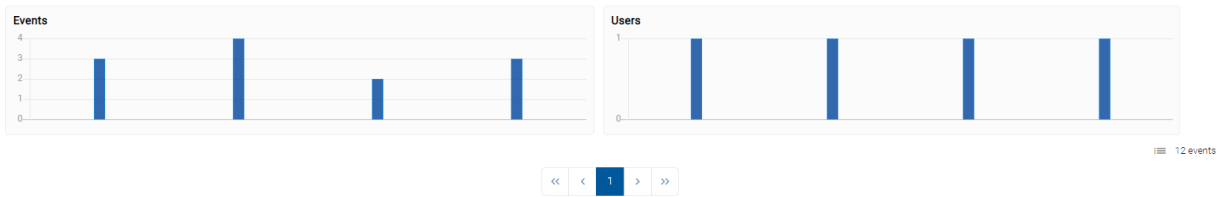
#	A	B	C	D	E	F	G	H	I	J
1	Sequence Time	User	Address	Computer	InternalAddress	Id	ClassificationCode	Event Type	EventDetails	
2	11 2020-04-01T09:00:24Z	anelson	127.0.0.1	SERVER		RSURqVpH7y7_zbalVAJ471ogFuLy1m	C=3^C=8	ENTITY_REVIEWED	Retention policy conflict. No default reason available.	
3	10 2020-04-01T09:00:24Z	anelson	127.0.0.1	SERVER		XB8d_bpjVjUoGxaD_0jm060IDI-R2fk1	C=3^F=2020-000030	ENTITY_REVIEWED	Retention policy conflict. No default reason available.	
4	9 2020-04-01T09:00:24Z	anelson	127.0.0.1	SERVER		ijddH_IP2Tbdj6hQMItOeZLSP4A2SKDr	C=3^F=2020-000030^D=000001	ENTITY_REVIEWED	Retention policy conflict. No default reason available.	
5	8 2020-03-19T13:27:48Z	anelson	192.168.50.15	Mozilla/5.0	2a01:260:4086:1282:100:b	zOGEGUVjgUMJDCOAGhTrkSaqh6nAPV3	C=3^D=000034	ENTITY_OPEN_READ_ONLY		
6	7 2020-03-19T13:27:28Z	anelson	192.168.50.15	Mozilla/5.0	2a01:260:4086:1282:100:b	_a2axJNwA7yNlWeVj19q1XgFqKQWCen	C=3^D=000033	ENTITY_OPEN_READ_ONLY		
7	6 2020-03-17T15:00:13Z	anelson	192.168.50.15	Mozilla/5.0	2a01:260:4086:1282:100:c	RSURqVpH7y7_zbalVAJ471ogFuLy1m	C=3^C=8	ENTITY_OPEN_READ_WRITE		
8	5 2020-03-17T07:55:31Z	anelson	192.168.50.15	Mozilla/5.0	192.168.100.51	UISxIqUKX70ano1FhnLNnV_G2JTJR71	C=3	ENTITY_SAVE		
9	4 2020-03-17T07:55:31Z	anelson	192.168.50.15	Mozilla/5.0	192.168.100.51	UISxIqUKX70ano1FhnLNnV_G2JTJR71	C=3	PROPERTY_VALUE_CHANGE	Changed properties: sys:Externalids	
10	3 2020-03-17T07:55:20Z	anelson	192.168.50.15	Mozilla/5.0	192.168.100.51	UISxIqUKX70ano1FhnLNnV_G2JTJR71	C=3	ENTITY_OPEN_READ_WRITE		
11	2 2020-03-12T14:12:03Z	anelson	192.168.50.15	Mozilla/5.0	2a01:260:4086:1282:100:5	XB8d_bpjVjUoGxaD_0jm060IDI-R2fk1	C=3^F=2020-000030	ENTITY_SAVE		
12	1 2020-03-12T14:12:03Z	anelson	192.168.50.15	Mozilla/5.0	2a01:260:4086:1282:100:5	XB8d_bpjVjUoGxaD_0jm060IDI-R2fk1	C=3^F=2020-000030	PROPERTY_VALUE_CHANGE	Changed properties: sys:Category, sys:Keywords	
13	0 2020-03-12T14:11:33Z	anelson	192.168.50.15	Mozilla/5.0	2a01:260:4086:1282:100:5	XB8d_bpjVjUoGxaD_0jm060IDI-R2fk1	C=3^F=2020-000030	ENTITY_OPEN_READ_WRITE		

Image 273: Saving audit log events in the CSV format

```
<?xml version="1.0" encoding="UTF-8"?>
<auditlog.query.resultset xsi:schemaLocation="http://www.imis.si/imisarc http://www.imis.si/imisarc/auditlog.xsd" xmlns="http://www.imis.si/imisarc" xmlns:xsi="http://www.imis.si/imisarc">
  <sessions>
    <!--Audit query sessions.-->
    <session id="1098" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100:5" dateTimeOpened="2020-03-12T09:10:12Z" username="anelson" computerName="SERVER" />
    <session id="1196" closureReason="0" address="192.168.50.15" internal_address="192.168.100.51" dateTimeOpened="2020-03-17T06:01:08Z" username="anelson" computerName="SERVER" />
    <session id="1222" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100:c" dateTimeOpened="2020-03-17T14:44:31Z" username="anelson" computerName="SERVER" />
    <session id="1357" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100:b" dateTimeOpened="2020-03-19T13:26:57Z" username="anelson" computerName="SERVER" />
    <session id="1954" closureReason="0" address="127.0.0.1" dateTimeOpened="2020-04-01T09:00:24Z" username="anelson" computerName="SERVER" />
  </sessions>
  <events>
    <!--Audit query events.-->
    <!--Sort compare function is QuerySorter::CompareSESS_TS-->
    <event sessionId="1098" type="3" seq="0" dateTime="2020-03-12T14:11:33Z" classificationCode="C=3^F=2020-000030" context="XB8d_bpjVjUoGxaD_0jm060IDI-R2fk1" />
    <event sessionId="1098" type="9" seq="1" dateTime="2020-03-12T14:12:03Z" classificationCode="C=3^F=2020-000030" context="XB8d_bpjVjUoGxaD_0jm060IDI-R2fk1" message="get" />
    <event sessionId="1098" type="4" seq="2" dateTime="2020-03-12T14:12:03Z" classificationCode="C=3^F=2020-000030" context="XB8d_bpjVjUoGxaD_0jm060IDI-R2fk1" />
    <event sessionId="1196" type="3" seq="3" dateTime="2020-03-17T07:55:20Z" classificationCode="C=3" context="UISxIqUKX70ano1FhnLNnV_G2JTJR71" />
    <event sessionId="1196" type="9" seq="4" dateTime="2020-03-17T07:55:31Z" classificationCode="C=3" context="UISxIqUKX70ano1FhnLNnV_G2JTJR71" message="Changed properties: sys:Externalids" />
    <event sessionId="1196" type="4" seq="5" dateTime="2020-03-17T07:55:31Z" classificationCode="C=3" context="UISxIqUKX70ano1FhnLNnV_G2JTJR71" message="get" />
    <event sessionId="1222" type="3" seq="6" dateTime="2020-03-17T15:00:13Z" classificationCode="C=3^C=8" context="RSURqVpH7y7_zbalVAJ471ogFuLy1m" />
    <event sessionId="1357" type="2" seq="7" dateTime="2020-03-19T13:27:28Z" classificationCode="C=3^D=000033" context="_a2axJNwA7yNlWeVj19q1XgFqKQWCen" />
    <event sessionId="1357" type="8" seq="8" dateTime="2020-03-19T13:27:48Z" classificationCode="C=3^D=000034" context="zOGEGUVjgUMJDCOAGhTrkSaqh6nAPV3" />
    <event sessionId="1954" type="26" seq="9" dateTime="2020-04-01T09:00:24Z" classificationCode="C=3^F=2020-000030^D=000001" context="ijddH_IP2Tbdj6hQMItOeZLSP4A2SKDr" />
    <event sessionId="1954" type="26" seq="10" dateTime="2020-04-01T09:00:24Z" classificationCode="C=3^F=2020-000030" context="XB8d_bpjVjUoGxaD_0jm060IDI-R2fk1" message="Retention policy conflict. No default reason available." />
    <event sessionId="1954" type="26" seq="11" dateTime="2020-04-01T09:00:24Z" classificationCode="C=3^C=8" context="RSURqVpH7y7_zbalVAJ471ogFuLy1m" message="Retention policy conflict. No default reason available." />
  </events>
</auditlog.query.resultset>
</?xml>
```


Image 274: Saving audit log events in the XML format

The number of events and users for each day in the selected time period is shown in graphs.



Title	Details	Identifier	Classification Code	User	Delegate	Version	Device name	Address	Internal address	Date ↓
Entity reviewed	Retention policy conflict. No default reason available	RSURqVPl7y7_2baLvAJ471ogfuLy1m	3.8	Alex Nelson			SERVER	127.0.0.1		1. Apr 2020, 11:00
Entity reviewed	Retention policy conflict. No default reason available	XB8d_bpjVjUoGxaD_0jmo60iDi-RZfk1	3-2020-000030	Alex Nelson			SERVER	127.0.0.1		1. Apr 2020, 11:00
Entity reviewed	Retention policy conflict. No default reason available	jjddH_IP2TBd6hQMITqE2LSP4A2SKDr	3-2020-000030/000001	Alex Nelson			SERVER	127.0.0.1		1. Apr 2020, 11:00
Entity open read-only		z0GEGUvlgUMJDCOAghTRkSaghnAPV3_	3/000034	Alex Nelson			Edge on Windows 10	192.168.50.15	2a01:260:4086:1282:100:b	19. Mar 2020, 14:27

Image 275: Result of searching by audit log events

By selecting the icon  the user defines which information will be shown in the columns.

In the top right part of the view, a popup menu appears with the following options:

- Identifier: unique identifier of the entity on the IMiS®/ARChive Server.
- Classification code: the entity classification code for displaying information on audit log events.
- User: the name of the selected user for displaying information on audit log events.
- Delegate: a user presented as a person authorized by another user in the authentication process and who executed an operation on that user's behalf.
- Version: the entity version for which data on selected audit log events will be displayed. If it is not a document, the value is empty.
- Device name: the name of the device from where the request to perform an action on the selected entity came.
- Address: the network address from where the request to perform an action on the selected entity came.
- Internal address: the IP address, which is set by opening a new session.

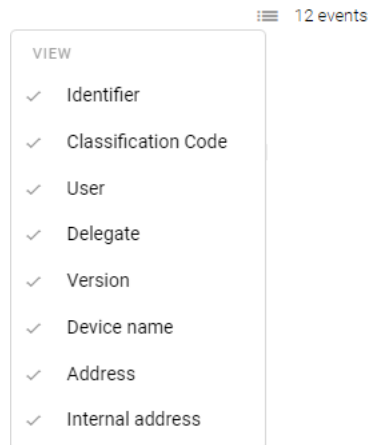


Image 276: Selecting information shown in columns

4.3.8 Archiving email messages

The IMiS®/wClient enables users to:

- Capture the received and sent email messages with corresponding metadata and attachments, depending on the IMiS®/ARChive Server settings.
- Creating and saving email messages based on the template “Email”.

To enable capture, the server must be configured with at least one template that contains email message attributes [Email attributes](#).

4.3.8.1 Capturing received and sent emails

The user can capture a received or sent email directly from the messaging client (MS Outlook, HCL Notes, etc.) and save it to the classification scheme of IMiS®/ARChive Server.

The user arranges the IMiS®/wClient and email client windows so that they are both visible on screen. By holding down the left mouse button, the user drags the selected email messages to the central view of the IMiS®/wClient.

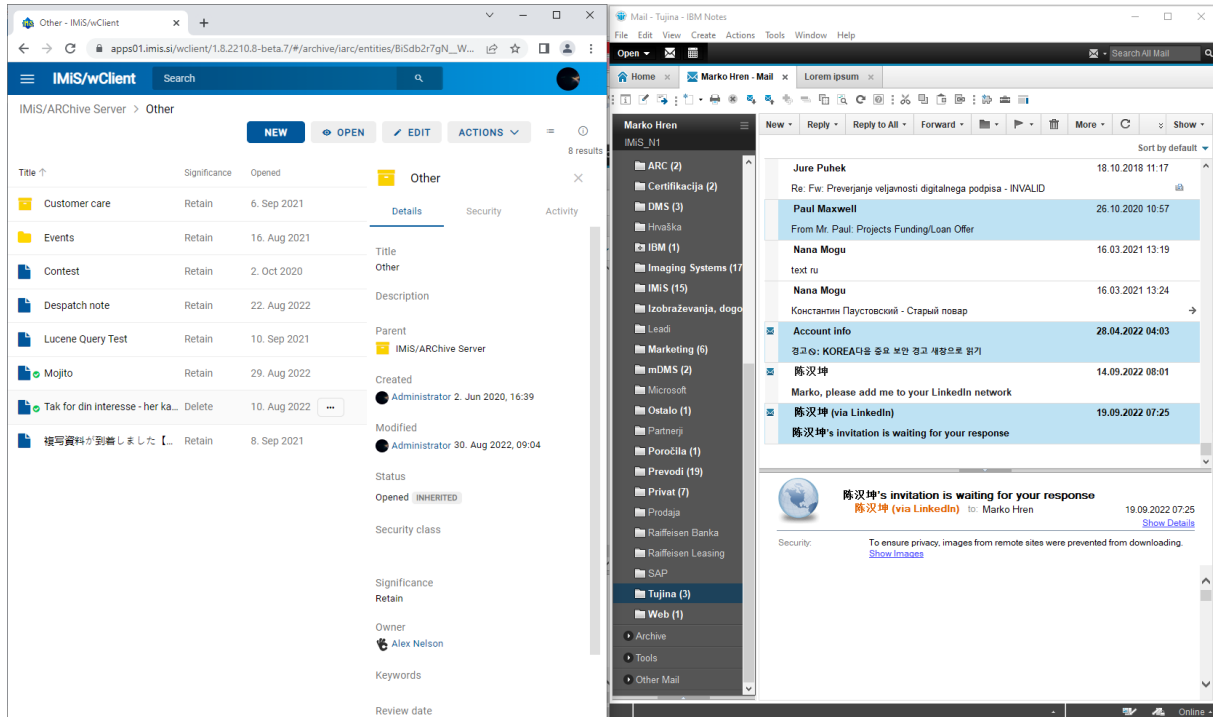


Image 277: Preparing the environment for transferring an email message from the email client to the archive

The user captures email messages by using the Drag and drop functionality.

The user marks one or several email messages, including their attachments, in the email client and drags them to the selected class or folder in the classification scheme in the IMiS®/wClient.

If a window appears notifying user that he can drop the selected email message, this means that a popup window for creating an entity will appear when the email message is dropped. If the email is recognized successfully and it is possible to create entities with a template that enables email, the Email tab will be shown.

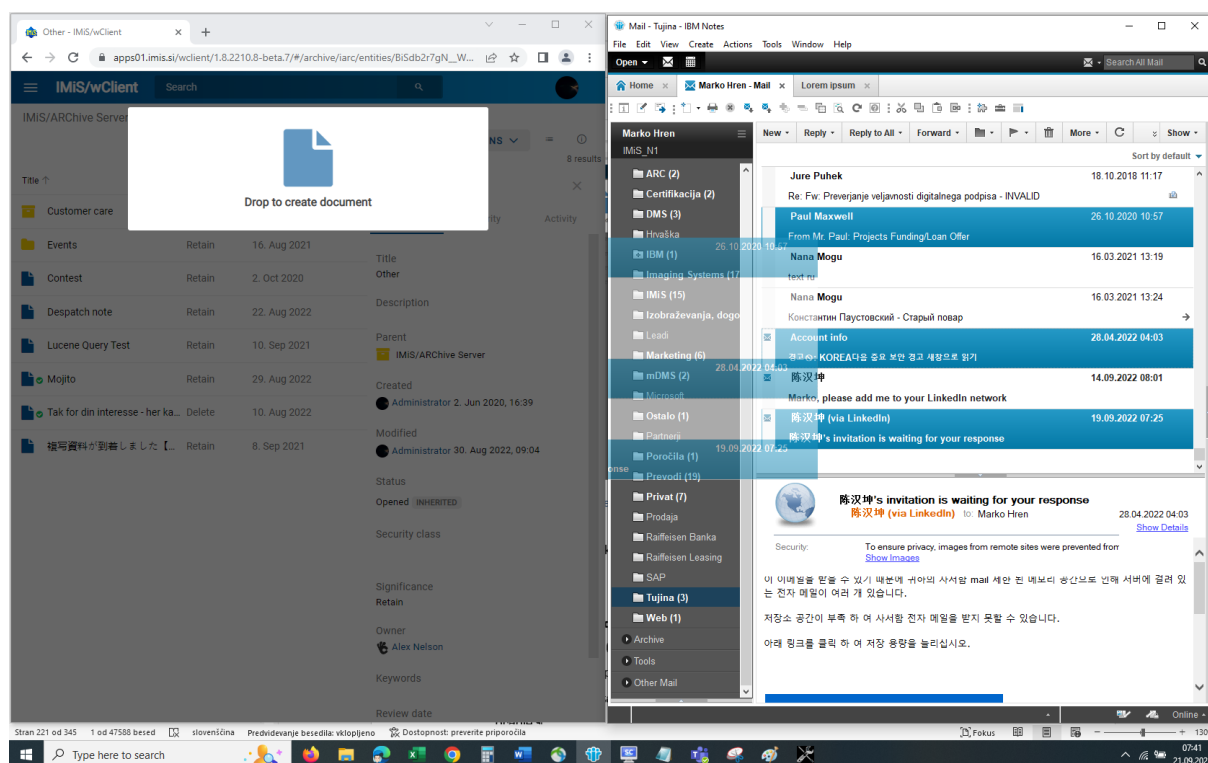


Image 278: Dropping the email message to the selected entity

After releasing the mouse button, a dialog box opens for viewing and editing the details of the email message.

4.3.8.1.1 Editing email message data

In the Details tab the user can view or edit the following metadata of the email message:

- Parent: the title of the parent entity. This attribute is read only.
- Template: a set of available templates for creating allowed entities and classifying them under the selected class or folder. This attribute is mandatory.
- Title: name of the folder or document described. Attribute value is mandatory.
- Classification code: a manually assigned classification code for the selected entity in the classification scheme.
- Description: Short description of the entity.
- Status: the current status of the entity.
- Security class: a set of available entity security classes based on the entity's position in the classification scheme.

- Significance: significance rating of the entity.
- Owner: a directory (user or group) entity that is responsible for the selected entity.
- Keywords: keywords related to the entity. Attribute can have multiple values.
- Categories: the entity view mode.
- Content: the content of the email message and attachment, each in its own content. This attribute is read-only.
- External identifiers: a list of the entity's unique external identifiers on the server.

Create Document

Details | Email | Security | Retention

Parent: Other

Template*: E-mail
Standalone e-mail entity

Title*: 경고: KOREA다음 중요 보안 경고 새창으로 읽기
Mandatory value for naming entity

Description: Nunc vehicula gravida odio, eu rhoncus nunc iaculis at.

Status: INHERITED

Security class: INHERITED

Significance: INHERITED

Owner: Alex Nelson

Keywords: gravida
Important words used in entity

Categories: nunc

Content: Binary content container
OF7CAEEDEA.BA697056-C 11.3 kB

Create another 0A720A6322BAFA91AF873F41CAB42B21.eml **Create** Cancel

Image 279: Viewing and editing the details of an email message before saving

In addition to the above-mentioned attributes, the user can also edit the so-called Custom attributes, which are predefined by the template.

When the selected email message is moved to the IMiS®/wClient, the value of the Title attribute is automatically transferred to the Content field, and contents containing email details are created. If the email contains additional contents, they too are transferred.

If the user is transferring multiple email messages simultaneously, the parameter for editing the next message is enabled by default in the dialog box for editing email messages.

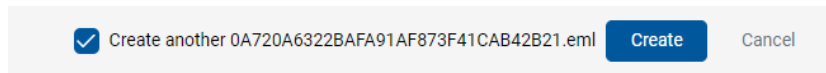


Image 280: Example of selecting the parameter for editing the next email message

If the user wants to create a new entity after creating the last transferred email message in the classification scheme, the user can do so by checking the parameter “Create another”.

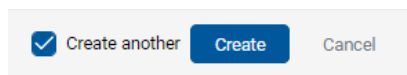


Image 281: Example of selecting the parameter for creating a new entity

After confirming the entry and selection of attribute values with the Create button, the selected messages are automatically transferred to the desired location in the classification scheme together with their metadata and content and are saved to the IMiS®/ARChive Server.

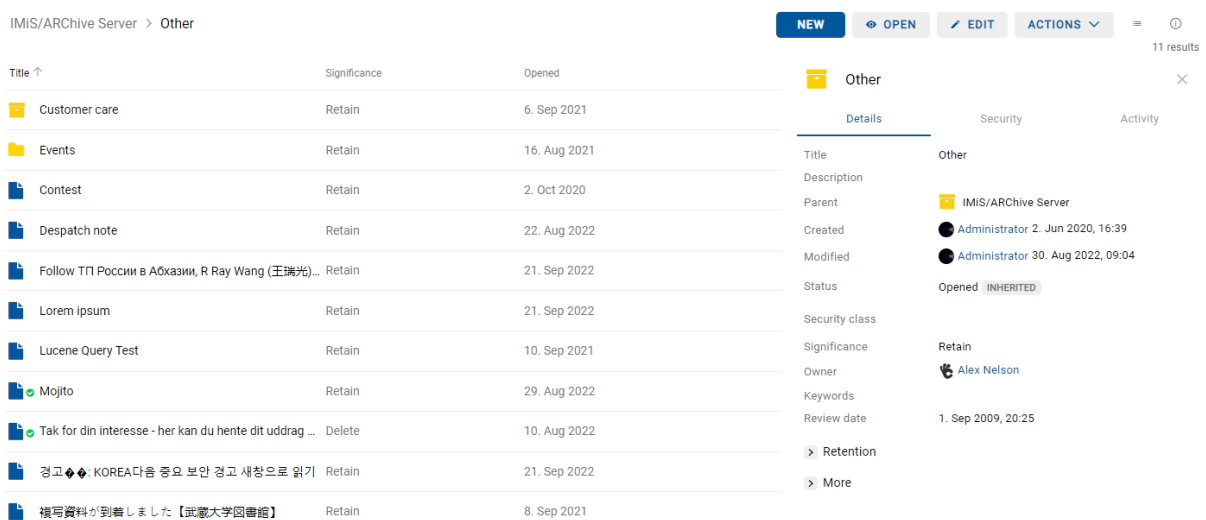


Image 282: Displaying a saved email message on the list of entities

In the Details tab, the user can see all the content that was saved together with the email message in the editing mode. In the Content field the original email message in the EML format and the recognized email attachments are created. Adding new contents is disabled, as is the execution of actions on the contents shown on the list.

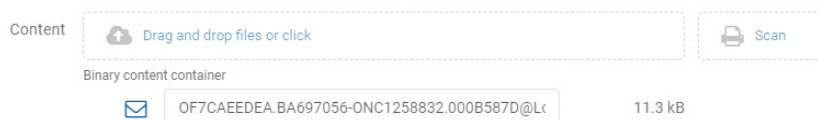


Image 283: Contents of the email message

4.3.8.2 Creating email messages

A user can create an email message by selecting the relevant template from the set of available templates.

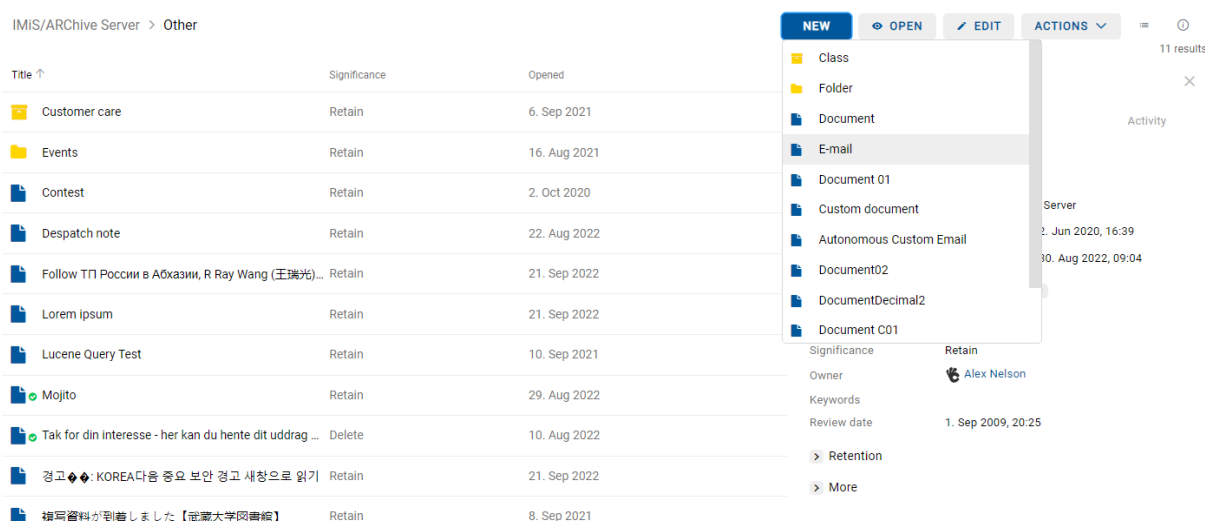


Image 284: Selecting a template for creating an email message

The user selects a file in the EML format from the file system.

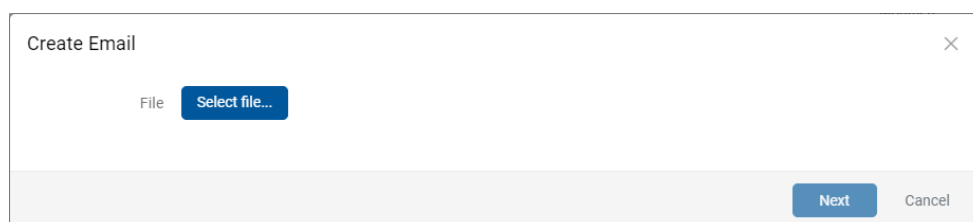


Image 285: Selecting an EML file

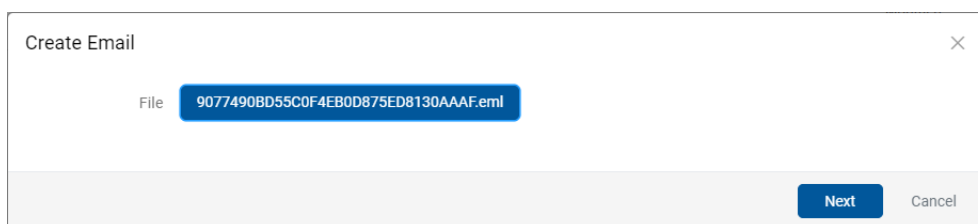


Image 286: Confirming the selection of an EML file

After selecting the action “Next”, the user is shown the email message data, which the user can then review and edit the next entity metadata.

For more information see chapter [Editing email message data](#).

4.3.8.3 Functionality description

After viewing and confirming the email message with the Create button, the content of the email message is parsed at the level of IMiS®/ARChive Server (version 10.1.2010 or above) and is copied to the appropriate location in the classification scheme, in the form of an EML file. For each email message, the IMiS®/wClient creates a new document containing the original message, the metadata and any captured content.

The following metadata (when present) is automatically extracted from the email message and is visible to the user in the Email tab:

- Subject: the subject of the message.
- From: email address of the sender.
- To: email addresses of recipients.
- CC: email addresses of the carbon copy recipients.
- BCC: email addresses of hidden recipients.
- Date: the date and time the message was sent or received.
- Message Id: automatically generated message identifier.
- Priority: priority status of the email.
- Signed: a value that registers if the email message was electronically signed.

The Date and Sender email metadata are mandatory.

If one of these is not successfully captured, the message will not be saved.

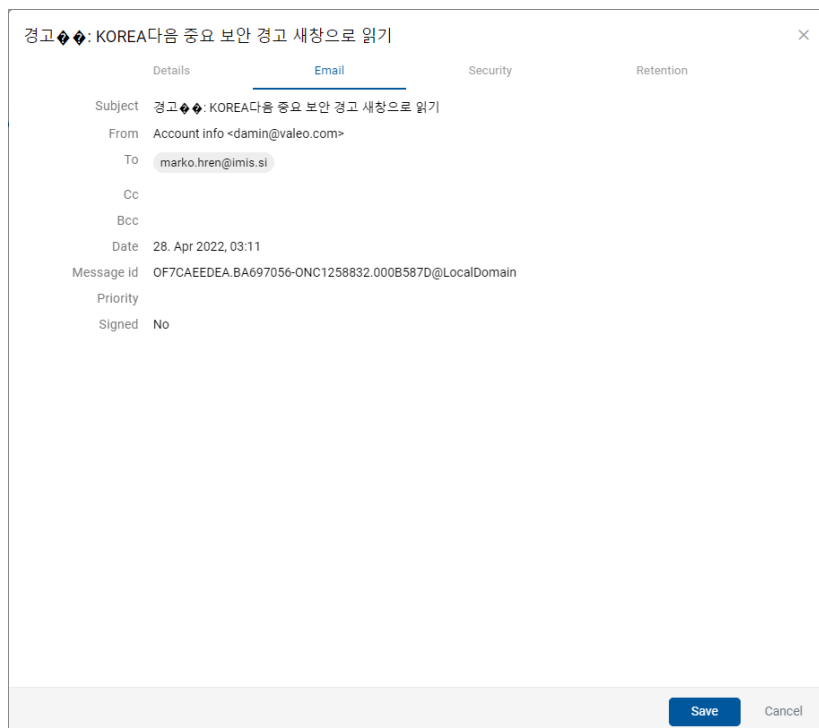


Image 287: Display of the metadata transferred from the email message

In the Physical Content tab the user can add information about the physical content.

In the Security tab the user with the Change permissions permission can change the access permissions of directory entities (users, groups, attributes).

Warning:

E-mail messages can't be saved if the selected template includes Required custom attribute.

4.3.9 Acquiring authenticity evidence


Authenticity evidence is created on the IMiS®/ARChive Server for the entities, whose properties correspond to at least one rule for generating proofs and have at least one metadata or content that is intended for generating proofs.

For additional information on rules for generating and renewing proofs see chapter [Rules in the IMiS®/ARChive Server Manual](#).

Evidence is created in packets, according to predetermined time intervals.

Warning:

Depending on the settings of the IMiS®/ARChive Server, authenticity evidence is created in certain intervals. The default setting is 5 minutes. The evidence thus becomes available when this time period has elapsed.

In case authenticity evidence for the selected entity already exists on the archive, the user can obtain authenticity evidence also by selecting the icon  in the set More of the Details tab in the right view.

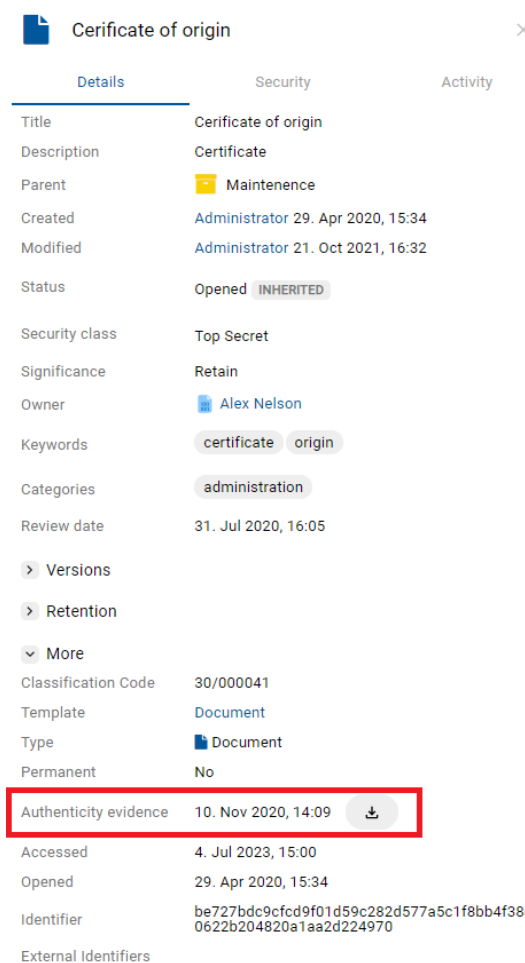


Image 288: Obtaining authenticity evidence in the Details tab

The notification bar in the upper right part of the user interface of the Google Chrome shows the information about saving a file with authenticity evidence.

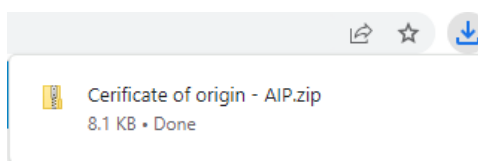


Image 289: Information for the user about saving a directory with authenticity evidence

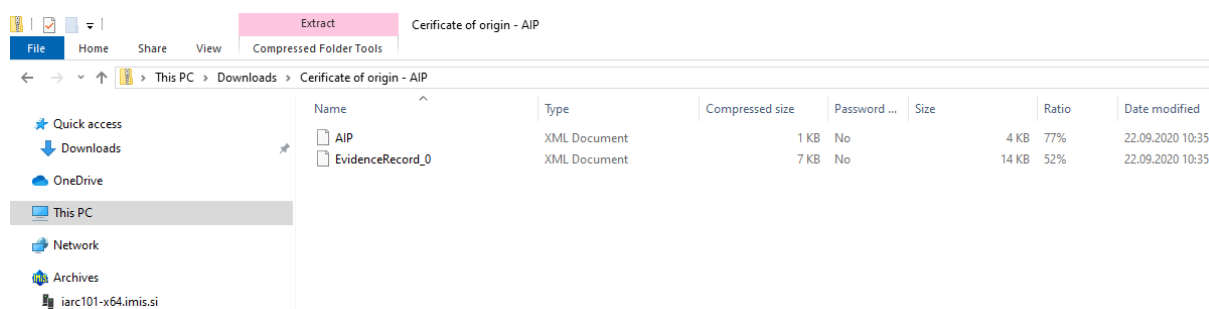


Image 290: A directory with two files containing authenticity evidence

The authenticity evidence includes these two file types:

- AIP.xml: XML file that contains the Archival Information Package – AIP, which is a summary of the entity's metadata and content subject to the authenticity verification procedure.
- EvidenceRecord X.xml: one or more XML files that contain the evidence record of the entity according to the Evidence Record Syntax – ERS standard, which prescribes a system for ensuring the authenticity of long-term archived content. The “X” in the name of the file means the successive number of the record.

```
<?xml version="1.0" encoding="UTF-8"?>
<aip:AIP xmlns:aip="http://www.imis.eu/imisarc/aip"
xmlns:ds="http://www.w3.org/2000/09/xmldsig#">
  <aip:Header Version="1">
    <ds:CanonicalizationMethod Algorithm="http://www.w3.org/TR/2001/REC-xml-c14n-20010315"/>
  </aip:Header>
  <aip:Attribute Id="sys:Closed" Type="16">
    <aip:Value>2014-03-31T16:23:50.401+02:00</aip:Value>
  </aip:Attribute>
  <aip:Attribute Id="sys:Opened" Type="16">
    <aip:Value>2014-03-31T16:23:47.094+02:00</aip:Value>
  </aip:Attribute>
  <aip:Attribute Id="sys:Status" Type="18">
    <aip:Value>Closed</aip:Value>
  </aip:Attribute>
```

```

<aip:Content Id="sys:Content">
  <aip:ContentValue>
    <ds:DigestMethod Algorithm="http://www.w3.org/2001/04/xmenc#sha256"/>
    <ds:DigestValue>ONPJp3qfSkFm...T5irpOT+SrJMp+VE=</ds:DigestValue>
  </aip:ContentValue>
</aip:Content>
</aip:AIP>

```

Image 291: Example archive information package

```

<?xml version="1.0" encoding="UTF-8"?>
<EvidenceRecord xmlns="http://www.setcce.org/schemas/ers" Version="1.0">
  <ArchiveTimeStampSequence>
    <ArchiveTimeStampChain Order="1">
      <DigestMethod Algorithm="http://www.w3.org/2000/09/xmldsig#sha1"/>
      <CanonicalizationMethod Algorithm="http://www.w3.org/TR/2001/REC-xml-c14n-20010315"/>
      <ArchiveTimeStamp Order="1">
        <HashTree>
          <Sequence Order="1">
            <DigestValue>RiHMqqrhrGATA/fDYJVO2IVg4fTw=</DigestValue>
            <DigestValue>dawWHxN2luddA7O+NGHYNd3ApG8=</DigestValue>
          </Sequence>
          <Sequence Order="2">
            <DigestValue>vqBEIqW7kGPUaFB/g6tfUFWwylE=</DigestValue>
          </Sequence>
        </HashTree>
      <TimeStamp>
        <TimeStampToken Type="XMLENTRUST">
          <dsig:Signature xmlns:dsig="http://www.w3.org/2000/09/xmldsig#" Id="TimeStampToken">
            <dsig:SignedInfo>
              <dsig:CanonicalizationMethod Algorithm="http://www.w3.org/TR/2001/REC-xml-c14n-20010315"/>
              <dsig:SignatureMethod Algorithm="http://www.w3.org/2000/09/xmldsig#rsa-sha1"/>
              <dsig:Reference URI="#TimeStampInfo-13ED106F54C2C33ED420000000000007BD7">
                <dsig:DigestMethod Algorithm="http://www.w3.org/2000/09/xmldsig#sha1"/>
                <dsig:DigestValue>fWwSCkWO4udY+/kvwMgL59scG3k=</dsig:DigestValue>
              </dsig:Reference>
              <dsig:Reference URI="#TimeStampAuthority">
                <dsig:DigestMethod Algorithm="http://www.w3.org/2000/09/xmldsig#sha1"/>
                <dsig:DigestValue>j8bwhFukHoD6jcmzgEZtXDF/ko=</dsig:DigestValue>
              </dsig:Reference>
            </dsig:SignedInfo>
            <dsig:SignatureValue>J5Vmm9HR9gYzPouh... ELWNov32qUw==
          </dsig:SignatureValue>
          <dsig:KeyInfo Id="TimeStampAuthority">
            <dsig:X509Data>
              <dsig:X509Certificate>MIIFYDCCBEi...InphHBlzxEkFU3</dsig:X509Certificate>
            </dsig:X509Data>
          </dsig:KeyInfo>
        </dsig:Reference URI="#TimeStampInfo-13ED106F54C2C33ED420000000000007BD7">
        <ts:TimeStampInfo xmlns:ds="http://www.w3.org/2000/09/xmldsig#"
          xmlns:ts="http://www.entrust.com/schemas/timestamp-protocol-20020207">

```

```
<ts:Policy id="http://www.si-tsa.si/dokumenti/SI-TSA-politika-za-casovni-zig-1.pdf"/>
<ts:Digest>
<ds:DigestMethod Algorithm="http://www.w3.org/2000/09/xmldsig#sha1"/>
<ds:DigestValue>kKsYK3bWkp5Zc/wbgssA/XIbNsA=</ds:DigestValue>
</ts:Digest>
<ts:SerialNumber>108487637460...6624147310345175</ts:SerialNumber>
<ts:CreationTime>2014-04-02T09:45:00.093Z</ts:CreationTime>
<ts:Nonce>7949411139179750976</ts:Nonce>
</ts:TimeStampInfo>
</dsig:Object>
</dsig:Signature>
</TimeStampToken>
<CryptographicInformationList>
<CryptographicInformation Order="1"
Type="CERT">MIIEHDCCAwwSgBAglE...z9Oz6gk/2vorAfGEhuB9nBxVeoQp</CryptographicInformation>
<CryptographicInformation Order="2"
Type="CRL">MIISKTCCECAQEwDQYJ...pYO2SYQMkw819LR9I/YOFg</CryptographicInformation>
</CryptographicInformationList>
</TimeStamp>
</ArchiveTimeStamp>
</ArchiveTimeStampChain>
</ArchiveTimeStampSequence>
</EvidenceRecord>
```

Image 292: Example evidence record

4.3.10 Reporting

The user can make reports on:

- [folders](#)
- [documents](#)
- [contents](#)
- [retention](#)
- [reviews](#)
- [access](#)
- [classification scheme](#)
- [entities](#)
- [deleted entities](#)
- [entities waiting for deletion.](#)

The user can access reports by selecting the username or icon and the action "Reports" in the popup menu.

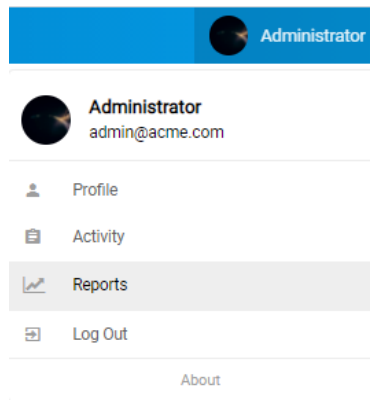
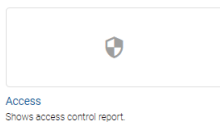
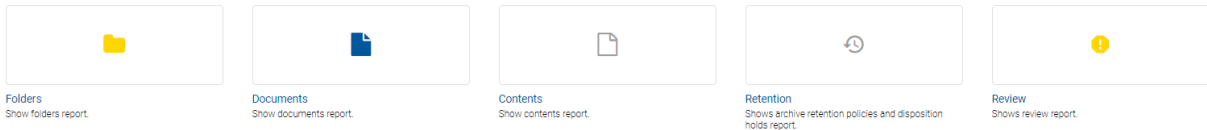


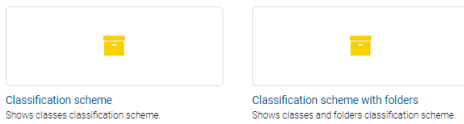
Image 293: Popup menu for selecting a report

Reports

Report types



Classification scheme



Other

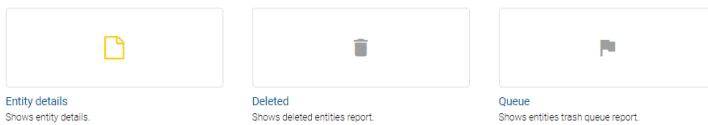



Image 294: Review of available reports

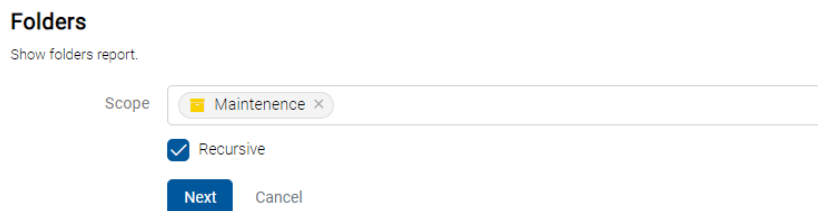
4.3.10.1 The Folder report

A folder report contains information about all the folders inside the selected archive, class or folder. The user creates it by selecting the icon  or the action “Folders” in the “Report types” section.

By selecting the root of the archive or selected entity, the user defines the scope of the report.

By checking of the “Recursive” parameter, the user defines that the report includes the selected entity, and all contained entities. On the contrary, by unchecking this parameter, the user limits the search to the selected entity and the first level of sub-entities.

The report will list all folders for the user throughout the archive or under the selected entity. After selecting the action “Next”, the report is prepared.



Folders
Show folders report.

Scope

Recursive

Image 295: Defining the scope of the folders report

The logged-on user then has the option of choosing how the data is shown in the report. By checking “Summary”, the user defines that the following information is shown in the report header:

- Archive
- Scope: the scope of the report.
- Classification code: the classification code of the selected entity in the classification scheme.
- Number of folders: the number of folders included.

By checking individual attributes in the category “View”, the folder data is shown in the report in the following columns:

- Classification code: the classification code of the folder in the classification scheme.
- Title: the title of the folder.
- Template: the name of the template, on which the folder was created.
- Status: the current status of the folder in the context of the archive.
Status dictates whether certain actions on the folder are allowed or not.
- Significance: the significance of the folder in the context of the archive.
- Security class: the security class of the folder or document. Security class is used for hiding entities from users, that do not have access rights to the entities set by the Security clearance level.
- Current location: the current location of the folder's physical content.
- Home location: the home location of the folder's physical content.
- Number of entities: represents the number of all contained entities.

Folders

Show folders report.

Scope

Recursive

Summary Show

View Classification Code
 Title
 Template
 Status
 Significance
 Security class
 Current location
 Home location
 Number of subentities

Image 296: Defining the scope of the folders report

Note: In the case of a longer report the user is first shown the notification “Preparing report”, followed by an indicative timeframe for preparing the report.

Folders

Show folders report.



Preparing report...

Image 297: The estimated timeframe for preparing the folders report

The report will list all folders for the user throughout the archive or under the selected entity. After selecting the action “Next”, the report is prepared.

Folders

Show folders report.


Print Export

Summary						
Archive:	IMiS/Archive 10.2					
Scope:	Maintenance					
Classification Code:	30					
Number of folders:	7					

Classification Code ↑	Title	Template	Status	Significance	Security class	Number of subtities
30-2021-000011	Razor	Folder	Opened	Retain	Top Secret	0
30-2021-000015	Kanjavec	Folder	Opened	Retain	Restricted	0
30-2022-000065	IAROLIWEB-557	Folder	Opened	Retain	Restricted	1
30-IS-081	Mojstrovka	Folder	Opened	Retain	Secret	2
30-IS-081-00003	Mala	Folder	Opened	Retain	Secret	2
30-IS-328	Olševa	Folder	Opened	Retain	Top Secret	0
30-IS-833	Stol	Folder	Opened		Restricted	1

Image 298: Example folder report

4.3.10.2 The Document report

A document report contains information about all the documents contained inside a selected archive, class or folder. The user creates it by selecting the icon  or the action “Documents” in the “Report types” section.

By selecting the root of the archive or selected entity, the user defines the scope of the report.

By checking of the “Recursive” parameter, the user defines that the report includes the selected entity, and all contained entities. On the contrary, by unchecking this parameter, the user limits the search to the selected entity and the first level of sub-entities.

The logged-on user then has the option of choosing how the data is shown in the report.

By checking “Summary”, the user defines that the following information is shown in the report header:

- Archive
- Scope: the scope of entities in the report.
- Classification code: the classification code of the selected entity in the classification scheme.
- Number of documents: the number of documents contained.
- Documents size: the total size of documents (KB/MB/GB).
- Number of errors: the total number of errors found (this field is shown if at least one error occurs).

By checking individual attributes in the category “View”, the document data is shown in the report in the following columns:

- Classification code: the classification code of the document in the classification scheme.
- Title: the title of the document.
- Template: the name of the template, on which the document was created.
- Status: the current status of the document in the context of the archive.
Status dictates whether certain actions on the documents are allowed or not.
- Significance: the significance of the document in the context of the archive.
- Security class: the security class of the entity. It is used to hide entities from users whose security class does not provide them with access to entities.
- Current location: the current location of the document's physical content.
- Home location: the home location of the document's physical content.
- Number of contents: the total number of content(s) in the documents.
- Size: the total size of the content(s) in the document.

Documents

Show documents report.

Scope

Recursive

Summary Show

View Classification Code

Title

Template

Status

Significance

Security class

Current location

Home location

Number of contents

Size

Image 299: Defining the scope of the documents report

The report will list all documents for the user throughout the archive or under the selected entity. After selecting the action “Next”, the report is prepared.

Documents

Show documents report.


Summary	
Archive:	IMiS/Archive 10.2
Scope:	Maintenance
Classification Code:	30
Number of documents:	42
Documents size:	69.2 MB

Classification Code ↑	Title	Template	Status	Significance	Security class	Current location	Home location	Number of contents	Size
30/000016	Kim	Document	Opened	Retain	Restricted			2	2.8 MB
30/000021	Grintavec	Document	Opened	Retain	Top Secret	G91	K92	1	2.1 MB
30/000023	Peca	Document 01	Opened	Vital	Confidential			5	3.0 MB
30/000025	Email: Boć	Email	Opened	Retain	Restricted			1	11.3 kB
30/000027	Email: Kladiovo	Email	Opened	Permanent	Restricted			1	4.8 kB
30/000029	Email: Korj	Email	Opened	Vital	Restricted			1	29.7 kB
30/000030	Email: Kum	Email	Opened	Retain	Restricted			1	45.7 kB

Image 300: Example of documents report

Note: In the event of errors, an entity error notification is shown below a given entity. All errors that are created if the entity fails to open are logged.

4.3.10.3 The Contents report

The content report contains information about all the files attached to the documents inside the selected archive, class or folder. The user creates it by selecting the icon  or the action “Contents” in the “Report types” section.

By selecting the root of the archive or selected entity, the user defines the scope of the report.

By checking of the “Recursive” parameter, the user defines that the report includes the selected entity, and all contained entities. On the contrary, by unchecking this parameter, the user limits the search to the selected entity and the first level of sub-entities.

The logged-on user then has the option of choosing how the data is shown in the report. By checking “Summary”, the user defines that the following information is shown in the report header:

- Archive
- Scope: the scope of entities in the report.
- Classification code: the classification code of the selected entity in the classification scheme.
- Number of documents: the number of documents contained.
- Documents size: the total size of documents (KB/MB/GB).
- Number of contents: the total number of content(s) in the documents.
- Number of errors: the total number of errors found (this field is shown if at least one error occurs).

By checking individual attributes in the category “View”, the contents data is shown in the report in the following columns:

- Classification code: the classification code of the document in the classification scheme.
- Title: the title of the document.
- Template: the name of the template, on which the document was created.
- Content description: a description of content (files) attached to a document.
- Content type: the types of content (files) attached to a document.
- Size: the sizes of content (files) attached to a document.

Contents

Show contents report.

Scope

Recursive

Summary Show

View Classification Code

Title

Template

Content description

Content Type

Size

Image 301: Defining the scope of the document contents report

The report will list all content(s) in all documents for the user throughout the archive or under the selected entity. After selecting the action “Next”, the report is prepared.

Contents

Show contents report.


Summary					
Archive:	IMiS/ARChive Server				
Scope:	Distribution				
Classification Code:	5				
Number of documents:	58				
Documents size:	1.2 GB				
Number of contents:	232				

Classification Code ↑	Title	Template	Content description	Content Type	Size
5.197/000001	Document 01	Document 01	Binary_1.txt	text/plain	3.1 kB
5.197/000001	Document 01	Document 01	Binary_2.pdf	application/pdf	41.7 kB
5.197/000001	Document 01	Document 01	Binary_2.pdf	application/pdf	41.7 kB
5.197/000001	Document 01	Document 01	Binary_2.pdf	application/pdf	41.7 kB
5.197/000003	Document 03a2	Custom document	Binary_1 (2).txt	text/plain	3.1 kB
5.197/000003	Document 03a2	Custom document	binary_3.mp4	video/mp4	37.8 MB

Image 302: Example of a document contents report

4.3.10.4 The Retention report

The retention report contains information on retention periods and disposition holds on all entities under the selected archive, class or folder. The user creates it by selecting the icon

 or the action “Retention” in the “Report types” section.

By selecting the root of the archive or selected entity, the user defines the scope of the report.

By checking of the “Recursive” parameter, the user defines that the report includes the selected entity, and all contained entities. On the contrary, by unchecking this parameter, the user limits the search to the selected entity and the first level of sub-entities.

The logged-on user then has the option of choosing how the data is shown in the report. By checking “Summary”, the user defines that the following information is shown in the report header:

- Archive.
- Scope: the scope of the report.
- Classification code: the classification code of the selected entity in the classification scheme.
- Number of classes: the number of classes contained.
- Number of folders: the number of folders contained.
- Number of documents: the number of documents contained.

The logged-on user then has the option of choosing how the data is shown in the report. By checking “Summary”, the user defines that the following information is shown in the report header:

- Classification code: the classification code of the entity in the classification scheme.
- Title: the title of the entity being described.
- Type: contains the type of the entity being described.
- Template: the name of the template, on which the entity was created.
- Policy: represents the type of entry (retention policy or disposition hold).
- Name: the name of the retention policy or disposition hold.
- Reason: the reason for the retention policy or disposition hold.
- Description: a description of the retention policy or disposition hold.

Retention

Shows archive retention policies and disposition holds report.

Scope

Recursive

Summary Show

View Classification Code

Title

Type

Template

Retention

Name

Reason

Description

Image 303: Defining the scope of the retention report

The report will list all content(s) in all documents for the user throughout the archive or under the selected entity. After selecting the action “Next”, the report is prepared.

Retention


Shows archive retention policies and disposition holds report.

Summary							
Archive:	IMIS/Archive Server						
Scope:	Administration						
Classification Code:	3						
Number of classes:	18						
Number of folders:	32						
Number of documents:	88						

Classification Code ↑	Title	Type	Template	Retention	Name	Reason	Description
3	Administration	Class	Class	Retention policy	10-years	Dispose after 10 years retention	Dispose after 10 years retention
3.124	AgreementsAgreementsAgreementsAgreementsAgreementsAgreementsAgreementsAgreementsAgreementsAgreements	Class	Class	Retention policy	10-years	Dispose after 10 years retention	Dispose after 10 years retention
3.124-2021-000001	f01	Folder	Folder	Retention policy	10-years	Dispose after 10 years retention	Dispose after 10 years retention
3.124-2021-000002	f02	Folder	Folder	Retention policy	10-years	Dispose after 10 years retention	Dispose after 10 years retention
3.133	AgreementsAgreementsAgreementsAgreementsAgreementsAgreementsAgreementsAgreementsAgreementsAgreements	Class	Class	Retention policy	10-years	Dispose after 10 years retention	Dispose after 10 years retention

Image 304: Example of a review report

4.3.10.5 The Review report

The review report contains information on reviews. The user creates it by selecting the icon  or the action “Review” in the “Report types” section.

By selecting the review, the user defines the scope of the report.

The report will list all reviews for the user throughout the archive or under the selected entity.

After selecting the action “Next”, the report is prepared.

Review

Shows review report.

Scope Review September 2022 x

Next Cancel

Image 305: Defining the scope of the review report

The report header provides the following information to the user:

- Review: the title of the review.
- Entities: the number of entities in the selected review.

Review

Shows review report.

[Print](#)

Review:	Review September 2022
Entities:	18

Image 306: Display of the renewal summary

Information on reviews is listed in the following sections and columns:

The Details section

- Property: the review properties.
- Value: the value of the review properties.

Details

Property	Value
Title	Review September 2022
Scope	
Scope Classification Code	
Description	Regular review 10-years
Status	Opened
Owner	Alex Nelson (anelson)
Creator	Administrator (admin)
Keywords	10y
State	InReview
Message	Review prepared
Members	John Jack Jill
Action	
Comments	May 2021 review
Created	6. May 2021, 13:14
Modified	16. Sep 2022, 08:48
Identifier	Ku6b6W30UBU-VW9Q_KYPPPT2pgLBE2GsFkwwpia509mU

Image 307: Example of a Review report - Properties

The Retention policy section

- Title: the name of the retention policy.
- Reason: the reason for the retention policy.
- Description: a description of the retention policy.

Retention policy

Name	Reason	Description
10years	Dispose after 10 years retention	Dispose after 10 years retention

Image 308: Example of a Review report – Retention policy

The Entities section

- Classification code: the classification code of the entity in the classification scheme.
- Title: the title of the entity being described.
- Type: contains the type of the entity being described.
- Action: an action on the entity.
- Reason: the reason for performing the action on the entity.
- Comment: the comment of the entity.
- Transferred: this parameter means the entity was transferred.
- Transfer identifier: a reference to the transferred entity.
- Identifier: the identifier of the review.

Entities

Classification Code	Title	Type	Action	Reason	Comment	Transferred	Transfer Identifier	Identifier
1.123.532	Class	Class	Review	Default action changed due t o Retain significance of entit y or its children.		No		
16.8.0.0-2020-000002	SUN F4	Folder	Review	Default action changed due t o Retain significance of entit y or its children.		No		
16.8.0.0-2020-000002	SUN F3	Folder	Review	Default action changed due t o Retain significance of entit y or its children.		No		
16.8.0-2020-000002	SUN F2	Folder	Review	Default action changed due t o Retain significance of entit y or its children.		No		
16.8-2020-000002	SUN F1	Folder	Review	Default action changed due t o Retain significance of entit y or its children.		No		

Image 309: Example of a retention report - Entities

The Report section

- Property: the review properties.
- Value: the value of the review properties.
- Review execute report: an XML report on the review.
- Textual review execute report: a textual report on the review.

Review execute report


Property	Value
Title	Review execute report
Description	
Created	16. Sep 2022, 09:12
Modified	16. Sep 2022, 09:12

```
<?xml version="1.0" encoding="UTF-8"?>
<Report-Header-Item>
<Action Id="A0">Dispose</Action>
<Action Id="A1">Permanent</Action>
<Action Id="A2">Transfer</Action>
<Action Id="A3">Review</Action>
</Header-Item>
<Entity Id="C=11\C=123\C=532" IdType="C" Action="A3"/>
<Entity Id="C=16\F=2020-000001" IdType="C" Action="A0" Error="true">
<Message>Processing aborted due to reason that entity is marked as already reviewed.</Message>
</Entity>
<Entity Id="C=16\F=2020-000002" IdType="C" Action="A3"/>
<Entity Id="C=16\C=8\C=0\F=2020-000002" IdType="C" Action="A3"/>
<Entity Id="C=9\C=31" IdType="C" Action="A1" Error="true">
<Message>Processing aborted due to reason that entity is marked as already reviewed.</Message>
</Entity>
<Entity Id="C=16\F=2020-000009" IdType="C" Action="A0" Error="true">
<Message>Processing aborted due to reason that entity is marked as already reviewed.</Message>
</Entity>
<Entity Id="C=16\C=8\C=0\F=2020-000002" IdType="C" Action="A0" Error="true">
<Message>Processing aborted due to reason that entity is marked as already reviewed.</Message>
</Entity>
<Entity Id="C=16\C=8\C=0\F=2020-000002" IdType="C" Action="A0" Error="true">
<Message>Processing aborted due to reason that entity is marked as already reviewed.</Message>
</Entity>
<Entity Id="C=16\F=2020-000014" IdType="C" Action="A0" Error="true">
<Message>Processing aborted due to reason that entity is marked as already reviewed.</Message>
</Entity>
<Entity Id="C=16\F=2020-000014" IdType="C" Action="A0" Error="true">
<Message>Processing aborted due to reason that entity is marked as already reviewed.</Message>
</Entity>
<Entity Id="C=5\D=000056" IdType="C" Action="A3"/>
<Entity Id="C=9\C=5\I=523" IdType="C" Action="A3"/>
<Entity Id="C=9\D=IS=36522" IdType="C" Action="A1" Error="true">
<Message>Processing aborted due to reason that entity is marked as already reviewed.</Message>
</Entity>
</Report>
```

```
Textual review execute report
2022-09-16T07:12:09.887Z Review action Review on entity C=11\C=123\C=532 (id type ClassificationCode) executed.
2022-09-16T07:12:09.887Z Review action Dispose on entity C=16\F=2020-000001 (id type ClassificationCode) FAILED to execute. Reason: Processing aborted due to reason that entity is marked as already reviewed.
2022-09-16T07:12:09.899Z Review action Review on entity C=16\C=8\F=2020-000002 (id type ClassificationCode) executed.
2022-09-16T07:12:09.888Z Review action Review on entity C=16\C=8\F=2020-000002\D=000001 (id type ClassificationCode) executed.
2022-09-16T07:12:09.911Z Review action Review on entity C=16\C=8\C=0\F=2020-000002 (id type ClassificationCode) executed.
2022-09-16T07:12:09.899Z Review action Review on entity C=16\C=8\C=0\F=2020-000002\D=000001 (id type ClassificationCode) executed.
2022-09-16T07:12:09.925Z Review action Review on entity C=16\C=8\C=0\C=0\F=2020-000002 (id type ClassificationCode) executed.
2022-09-16T07:12:09.911Z Review action Review on entity C=16\C=8\C=0\C=0\F=2020-000002\D=000001 (id type ClassificationCode) executed.
2022-09-16T07:12:09.942Z Review action Review on entity C=16\C=8\C=0\C=0\F=2020-000002 (id type ClassificationCode) executed.
2022-09-16T07:12:09.926Z Review action Review on entity C=16\C=8\C=0\C=0\F=2020-000002\D=000001 (id type ClassificationCode) executed.
2022-09-16T07:12:09.942Z Review action Permanent on entity C=3\C=31 (id type ClassificationCode) FAILED to execute. Reason: Processing aborted due to reason that entity is marked as already reviewed.
2022-09-16T07:12:09.942Z Review action Dispose on entity C=16\D=000007 (id type ClassificationCode) FAILED to execute. Reason: Processing aborted due to reason that entity is marked as already reviewed.
2022-09-16T07:12:09.942Z Review action Dispose on entity C=16\F=2020-000009 (id type ClassificationCode) FAILED to execute. Reason: Processing aborted due to reason that entity is marked as already reviewed.
2022-09-16T07:12:09.943Z Review action Dispose on entity C=16\C=Test01 (id type ClassificationCode) FAILED to execute. Reason: Processing aborted due to reason that entity is marked as already reviewed.
2022-09-16T07:12:09.943Z Review action Dispose on entity C=16\F=2020-000014 (id type ClassificationCode) FAILED to execute. Reason: Processing aborted due to reason that entity is marked as already reviewed.
2022-09-16T07:12:09.943Z Review action Dispose on entity C=16\F=2020-000014\F=00001 (id type ClassificationCode) FAILED to execute. Reason: Processing aborted due to reason that entity is marked as already reviewed.
2022-09-16T07:12:09.950Z Review action Review on entity C=9\D=IS=36522 (id type ClassificationCode) FAILED to execute. Reason: Processing aborted due to entity significance value.
2022-09-16T07:12:09.950Z Review action Review on entity C=9\D=IS=36522 (id type ClassificationCode) executed.
2022-09-16T07:12:09.957Z Review action Review on entity C=9\D=000056 (id type ClassificationCode) executed.
2022-09-16T07:12:09.962Z Review action Review on entity C=9\D=IS=36522 (id type ClassificationCode) executed.
2022-09-16T07:12:09.962Z Review action Permanent on entity C=9\D=IS=36522 (id type ClassificationCode) FAILED to execute. Reason: Processing aborted due to reason that entity is marked as already reviewed.
```

Image 310: Example of a retention report - Reput

4.3.10.6 The Access report

The access report contains information about the access rights / permissions of users on all the folders and documents inside a selected archive, class or folder, to which the archive users have access. The user creates it by selecting the icon  or the action "Access" in the "Report types" section.

By selecting the archive's root or selected entity, the user defines the scope of the report.

By checking of the "Recursive" parameter, the user defines that the report includes the selected entity, and all contained entities. On the contrary, by unchecking this parameter, the user limits the search to the selected entity and the first level of sub-entities.

Select the "User" from the list.

If you wish to create an entity access report on all the users of the archive, leave the field with the label "All users" blank. Otherwise, select one or more users from the list ("Select user").

The logged-on user then has the option of choosing how the data is shown in the report.

By checking "Summary", the user defines that the following information is shown in the report header:

- Archive.
- Scope: the scope of entities in the report.
- Classification code: the classification code of the selected entity in the classification scheme.
- Number of classes: the number of classes contained.
- Number of folders: the number of folders contained.
- Number of documents: the number of documents contained.

By checking individual attributes in the category "View", the access data is shown in the report in the following columns:

- Classification code: the classification code of the entity in the classification scheme.
- Title: the title of the entity.
- Type: the type of the entity being described.
- Template: the name of the template, on which the document was created.
- Status: the status of the entity in the context of the archive.
Status dictates whether certain actions on the document are allowed or not.
- Significance: the significance of the entity in the context of the archive.
- Security class: the security class of the entity. Security classes are used to hide entities from users whose clearance level is not high enough to access them.
- Current location: the current location of the entity's physical content.
- Home location: the home location of the entity's physical content.
- User: the name of the user the report is on.
- Read: this value tells if the user has access right to read entities.
- Write: this value tells if the user has access right to edit entities.
- Delete: this value tells if the user has access right to delete entities.

- Move: this value tells if the user has access right to move entities.
- Create entities: this value tells if the user has access right to create entities.
- Change permissions: this value tells if the user has access right to change permissions.
- Change security class: this value tells if the user has access right to change security class.
- Change status: this value tells if the user has access right to change status.
- Change retention: this value tells if the user has access right to change retention.
- Create references: this value tells if the user has access right to create a reference to another reference.

Access

Shows access control report.

Scope

Recursive

User +

Summary Show

View

- Classification Code
- Title
- Type
- Template
- Status
- Significance
- Security class
- Current location
- Home location
- User
- Read
- Write
- Delete
- Move
- Create entites
- Change permissions
- Change security class
- Change status
- Change retention
- Create references

Image 311: Defining the scope of the access report

The report will list all access rights for the user throughout the archive or under the selected entity. After selecting the action “Next”, the report is prepared.

Access

Shows access control report.


Print Export

Summary																			
Archive:															IMiS/ARChive Server				
Scope:															Development				
Classification Code:															14				
Number of classes:															9				
Number of folders:															9				
Number of documents:															482				

Classification Code	Title	Type	Template	Status	Significance	Security class	Current location	Home location	User	Read	Write	Delete	Move	Create entities	Change permissions	Change security classes	Change status	Change retention	Create references	
14	Development	Class	Class	Opened	Retain				Alex Nelson (anelson)	✓										
14.666	AgreementAgreementsAgreementsAgreementsAgreementsAgreements	Class	Class	Opened	Permanent	Confidential			Alex Nelson (anelson)	✓										
14.668	ClassificationCodeTest01	Class	Class	Opened	Retain				Alex Nelson (anelson)	✓										

Image 312: Example access report on the selected user

4.3.10.7 The Classification scheme report

A classification scheme report contains information about all the classes inside the selected archive or class. The user creates it by selecting the icon  or the action “Classification scheme” or “Classification scheme with folders” in the “Classification scheme” section.

Classes in the classification scheme

By selecting the archive's root or selected entity, the user defines the scope of the report.

The logged-on user then has the option of choosing how the data is shown in the report. By checking “Summary”, the user defines that the following information is shown in the report header:

- Archive.
- Scope: the scope of entities in the report.
- Classification code: the classification code of the selected entity in the classification scheme.
- Number of classes: the number of classes contained.

By checking individual attributes in the category “View”, the classification scheme data is shown in the report in the following columns:

- Classification code: the classification code of the class in the classification scheme.
- Title: the title of the class being described.
- Created: the date the entity was created on the server.

Classification scheme

Shows classes classification scheme.

Scope

Summary Show

View Classification Code
 Title
 Created

Image 313: Defining the scope of the classes in the classification scheme report

The report will list all classes for the user throughout the archive or under the selected entity. After selecting the action “Next”, the report is prepared.

Classification scheme

Shows classes classification scheme.

Summary	
Archive:	IMIS/ARChive Server
Scope:	Development
Classification Code:	14
Number of classes:	8

Classification Code	Title	Created
14.666	AgreementsAgreementsAgreementsAgreementsAgreementsAgreementsAgreementsAgreementsAgreementsAgreements	13. Nov 2018, 13:26
14.668	ClassificationCodeTest01	16. Mar 2021, 11:27
14.669	ClassificationCodeTest02	16. Mar 2021, 11:28
14.671	ClassTest03	16. Mar 2021, 14:59
14.684	Road show	3. Jun 2020, 10:12
14.684.0	SMILE C2	3. Jun 2020, 10:12
14.684.0.0	SMILE C3	3. Jun 2020, 10:13
14.684.0.0.0	SMILE C4	3. Jun 2020, 10:13

Image 314: Example of a classification scheme report on the classes

Classes and folders in the classification scheme

By selecting the archive's root or selected entity, the user defines the scope of the report.

The logged-on user then has the option of choosing how the data is shown in the report.

By checking “Summary”, the user defines that the following information is shown in the report header:

- Archive.
- Scope: the scope of the report.
- Classification code: the classification code of the selected entity in the classification scheme.
- Number of classes: the number of classes contained.
- Number of folders: the number of folders contained.

By checking individual attributes in the category “View”, the classification scheme data is shown in the report in the following columns:

- Classification code: the classification code of the class or folder in the classification scheme.
- Title: the title of the class or folder being described.
- Type: the type of the entity being described.
- Created: the date the entity was created on the server.

Classification scheme with folders

Shows classes and folders classification scheme.

Scope

Summary Show

View Classification Code
 Title
 Type
 Created

Image 315: Defining the scope of the classes and folders in the classification scheme report

The report will list all classes and folders for the user throughout the archive or under the selected entity. After selecting the action “Next”, the report is prepared.

Classification scheme with folders

Shows classes and folders classification scheme.


[Print](#) [Export](#)

Summary			
Archive:	IMIS/ARChive Server		
Scope:	Distribution		
Classification Code:	5		
Number of classes:	11		
Number of folders:	13		

Classification Code ↑	Title	Type	Created
5.233	IARCLUIWEB-556	Class	8. Aug 2022, 15:39
5.SCSVCJ-371	SCSVCJ-371	Class	11. Aug 2022, 08:56
5-IS-315	Havana	Folder	11. Aug 2021, 12:30
5.245	Emails	Class	2. Sep 2022, 10:58

Image 316: Example of a classification scheme report on the classes and folders

4.3.10.8 The Entity report

The entity report contains selected entity data. The user creates it by selecting the icon  or the action “Entity details” in the “Other” section.

By selecting the entity, the user defines the scope of the report.

The user can limit the displayed data set with the settings of the following fields and/or parameters:

- Version: entity version.
- Content: content of documents or emails.
- Security: collection of access permissions for directory entities and entity properties.
- Physical content: metadata and location of the physical content.
For more information on physical content see chapter [Physical content](#).
- Email: email information. Available only for documents created using the template “Email”.
For more information see chapter [Email](#).
- Retention: information on retention periods and disposition holds.
For more information see chapter [Retention](#).
- Save log: information on checking the validity of electronic signatures and digital certificates upon capture. For more information see chapter [Save log](#).

- Transfer metadata: information on the transfer of physical content (and the audit log).
- Custom metadata: additional metadata shown based on the type of template.

For more information see chapter [Custom metadata](#).

After selecting the action “Next”, the report is prepared.

Entity details
Shows entity details.

Scope

Version

Content
 Security
 Physical properties
 Email
 Retention
 Save Log
 Transfer metadata
 Review date

Image 317: Defining the scope of the entity report

Information on entity are listed in the following columns:

- Classification code: the classification code of the entity in the classification scheme.
- Template: the name of the template.
- Status: the current status of the entity.
- Significance: the significance of the entity.
- Security class: the security class of the entity.
- Current location: the current location of the document's physical content.
- Home location: the home location of the document's physical content.
- Number of contents: the total number of content(s) in the documents.
- Size: sizes of content (files) attached to a document.

Entity details

Shows entity details.

[Print](#)

Other

Property	Type	Value
Classification Code	STRING200	16
Title	STRING200	Other
Description	STRING200	
Permanent	BOOL	No
Status	UINT32	Opened
Opened	DATE_TIME	2 Jun 2020, 16:39
Closed	DATE_TIME	
Security class	UINT32	
Significance	UINT32	
Owner	DIRECTORY_ENTITY	Alex Nelson (anelson)
Creator	DIRECTORY_ENTITY	Administrator (admin)
Keywords	STRING30	
Template	STRING200	Class
Type	STRING10	
Created	DATE_TIME	2 Jun 2020, 16:39
Modified	DATE_TIME	27 Sep 2020, 20:29
Accessed	DATE_TIME	8 Sep 2021, 14:01
Identifier	STRING100	4e42b9f9-5f1f-4f6b-8018-018016519204
External Identifiers	STRING100 []	
Parent	STRING200	
Review Trigger	DATE_TIME	1 Sep 2009, 20:25

Image 318: Example of the Entities report – Properties

Retention

Name	Reason	Description
10-years	Dispose after 10 years retention	Dispose after 10 years retention
5-years	Dispose after 5 years retention	Dispose after 5 years retention
2-years	Dispose after 2 years retention	Dispose after 2 years retention

Disposition holds

Name	Reason	Description
Legacy procedure	Active legal procedure	Legal procedure in progress, material must be preserved until finished

Image 319: Example of the Entities report –Retention

Security

Name	Type	Permission	Read	Write	Delete	Move	Create entites	Change permis ions	Change security class	Change status	Change retentio n	Create referenc es	Valid from	Valid to
anelson	USER	Allow	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
anelson	USER	Allow, Inherited	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Anonymous	USER	Allow, Inherited	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
board [DELETE D 10004]	GROUP	Allow, Inherited	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
sys Everyone	GROUP	Allow	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
sys Everyone	GROUP	Allow, Inherited										✓		
glayton	USER	Allow, Inherited	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
jturner	USER	Allow, Inherited	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
jsmith [DELETE D 20005]	USER	Allow, Inherited	✓	✓										
iclay	USER	Allow, Inherited	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
marko	USER	Allow, Inherited	✓	✓	✓									
sys Owner	ATTRIBUTE	Allow	✓	✓			✓	✓						
sys Owner	ATTRIBUTE	Allow, Inherited	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
sys Administrat ors	GROUP	Allow, Inherited	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		

Security / DateTime

Name	Type	Permission	Read	Write	Create	Delete	Valid from	Valid to
glayton	USER	Allow, Inherited	✓	✓	✓	✓		

Security / evaluation

Name	Type	Permission	Read	Write	Create	Delete	Valid from	Valid to
jturner	USER	Allow, Inherited	✓	✓	✓	✓		

Image 320: Example of the Entities report – Security

Transfer metadata

Property	Type	Value
Classification Code	STRING100	0
Transfer date	DATE_TIME	10. Mar 2020, 08:25
Transfer system identifier	STRING100	S910_LZK30JTLj9eVj0CaFBRDAa5-Bmm


Transfer audit log

```
<?xml version="1.0" encoding="UTF-8"?>
<auditlog query/resultset xsi:schemaLocation="http://www.imis.si/misarc/http://www.imis.si/misarc/auditlog.xsd" xmlns="http://www.imis.si/misarc" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
<sessions>
<-Audit query sessions-->
<session id="53" closureReason="0" address="192.168.80.64" internal_address="1" dateTimeOpened="2020-02-19T12:16:32Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/80.0.3987.106 Safari/537.36"/>
<session id="139" closureReason="0" address="192.168.80.64" internal_address="1" dateTimeOpened="2020-02-22T14:32:59Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/80.0.3987.106 Safari/537.36"/>
<session id="179" closureReason="0" address="192.168.80.64" internal_address="1" dateTimeOpened="2020-02-25T09:56:53Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/80.0.3987.116 Safari/537.36"/>
<session id="271" closureReason="0" address="192.168.50.15" internal_address="2801260408612807de0410d6e467d0e" dateTimeOpened="2020-02-26T15:28:42Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/79.0.3945.130 Safari/537.36"/>
<session id="328" closureReason="0" address="192.168.50.15" internal_address="192.168.80.64" dateTimeOpened="2020-02-27T15:35:47Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/80.0.3987.122 Safari/537.36"/>
<session id="359" closureReason="0" address="192.168.80.64" internal_address="1" dateTimeOpened="2020-02-28T14:29:59Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/80.0.3987.122 Safari/537.36"/>
<session id="357" closureReason="0" address="192.168.80.64" internal_address="1" dateTimeOpened="2020-02-28T13:57:51Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/80.0.3987.122 Safari/537.36"/>
<session id="358" closureReason="0" address="192.168.80.64" internal_address="1" dateTimeOpened="2020-02-28T13:57:52Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/80.0.3987.122 Safari/537.36"/>
<session id="404" closureReason="0" address="192.168.80.64" internal_address="1" dateTimeOpened="2020-02-28T15:48:58Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/80.0.3987.122 Safari/537.36"/>
<session id="405" closureReason="0" address="192.168.80.64" internal_address="1" dateTimeOpened="2020-02-28T15:48:58Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/80.0.3987.122 Safari/537.36"/>
<session id="415" closureReason="0" address="192.168.50.15" internal_address="192.168.80.64" dateTimeOpened="2020-03-03T12:51:27Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/80.0.3987.122 Safari/537.36"/>
</sessions>
</auditlog>
```

Image 321: Example of the Entities report – Transfer metadata

4.3.10.9 The Deleted entities report

The deleted entities report contains information on entities deleted throughout the archive.

The user creates it by selecting the icon  or the action “Deleted” in the “Other” section.

The logged-on user then has the option of choosing how the data is shown in the report.

By checking “Summary”, the user defines that the following information is shown in the report header:

- Archive.
- Scope: the scope of entities in the report.
- Size: the number of all deleted entities.
- Number of classes: the number of classes contained.
- Number of folders: the number of folders contained.
- Number of Documents: the number of documents contained.

By checking individual attributes in the category “View”, the deleted entities data is shown in the report in the following columns:

- Classification code: the classification code of the deleted entity in the classification scheme.
- Title: The title of the deleted entity being described.
- Type: the type of the deleted entity being described.
- Description: a short description of the deleted entity.
- Agent: the user who executed the delete action.
- Deleted: the date and time of deleting the entity from the archive server.

Deleted

Shows deleted entities report.

Summary Show

View Classification Code

Title

Type

Description

Agent

Deleted

Next

Cancel

Image 322: Decision before preparing the report

After selecting the action “Next”, the report is prepared.

Deleted

Shows deleted entities report.

Print Export

Summary					
Archive:	IMIS/ARChive Server				
Size:	1133				
Number of classes:	263				
Number of folders:	49				
Number of documents:	821				

Classification Code	Title	Type	Description	Agent	Deleted
0	Administration	Class		Administrator (admin)	10. Mar 2020, 10:31
0.10	Class 5	Class		Administrator (admin)	10. Mar 2020, 10:15
0.11	Class 6	Class		Administrator (admin)	10. Mar 2020, 10:15
0.12	Class 7	Class		Administrator (admin)	10. Mar 2020, 10:15
0.16	Categories	Class		Administrator (admin)	10. Mar 2020, 10:31
0.16.6	Class 1	Class		Administrator (admin)	10. Mar 2020, 10:30

Image 323: Example of the Deleted entities report

4.3.10.10 The Delete queue report

The delete queue report contains information on entities placed on the delete queue list.

The user creates it by selecting the icon or the action “Queue” in the “Other” section.

By selecting the root of the archive (leaving the field blank) or selected entity, the user defines the scope of the report.

By checking of the “Recursive” parameter, the user defines that the report includes the selected entity, and all contained entities. On the contrary, by unchecking this parameter, the user limits the search to the selected entity and the first level of sub-entities.

The logged-on user then has the option of choosing how the data is shown in the report. By checking “Summary”, the user defines that the following information is shown in the report header:

- Archive.
- Scope: the scope of entities in the report.
- Classification code: the classification code of the selected entity in the classification scheme.
- Number of classes: the number of classes contained.
- Number of folders: the number of folders contained.
- Number of documents: the number of documents contained.

By checking individual attributes in the category “View”, the delete queue data is shown in the report in the following columns:

- Classification code: the classification code of the class in the classification scheme.
- Type: the type of the entity being described.
- Template: the name of the template used to create the entity.
- Status: the status of the entity in the context of the archive owner.
- Security class: the security class of the entity. It is used to hide entities from users whose security class does not provide them with access to entities.
- Creator: the user who created the entity; meaning the user who was logged in during the session when the entity was created. This metadata never changes throughout the entity's existence.
- Owner: a directory entity (user or group) entity that is responsible for the selected entity (owner).

Queue

Shows entities trash queue report.

Scope

Recursive

Summary Show

View Classification Code

Title

Type

Template

Status

Significance

Security class

Creator

Owner

Image 324: Defining the scope of the delete queue report

After selecting the action "Next", the report is prepared.

Queue

Shows entities trash queue report.

Summary									
Archive:					IMIS/Archive Server				
Scope:					Administration				
Classification Code:					3				
Number of classes:					0				
Number of folders:					1				
Number of documents:					1				
Classification Code ↑	Title	Type	Template	Status	Significance	Security class	Creator	Owner	
3-148/000006	Sombbrero	Document	Custom document	Opened	Delete	Confidential	Administrator (admin)	Alex Nelson (anelson)	
3-2021-000128	Level 1	Folder	Folder	Opened	Delete		Administrator (admin)		

Image 325: Example of the delete queue report

4.3.10.11 Printing the report

The logged-on user can print the report.

By selecting the action “Print”, a print preview is shown. The user prints the report by selecting the action “Print” or cancels it by selecting the action “Cancel”.

The screenshot shows a web interface for a report titled "Deleted". The report content is displayed in a table with columns: Classification Code, Title, Type, Description, Agent, and Deleted. The table lists various classes and documents, all marked as deleted on 10. Mar 2020. To the right of the report is a print settings panel with the following options:

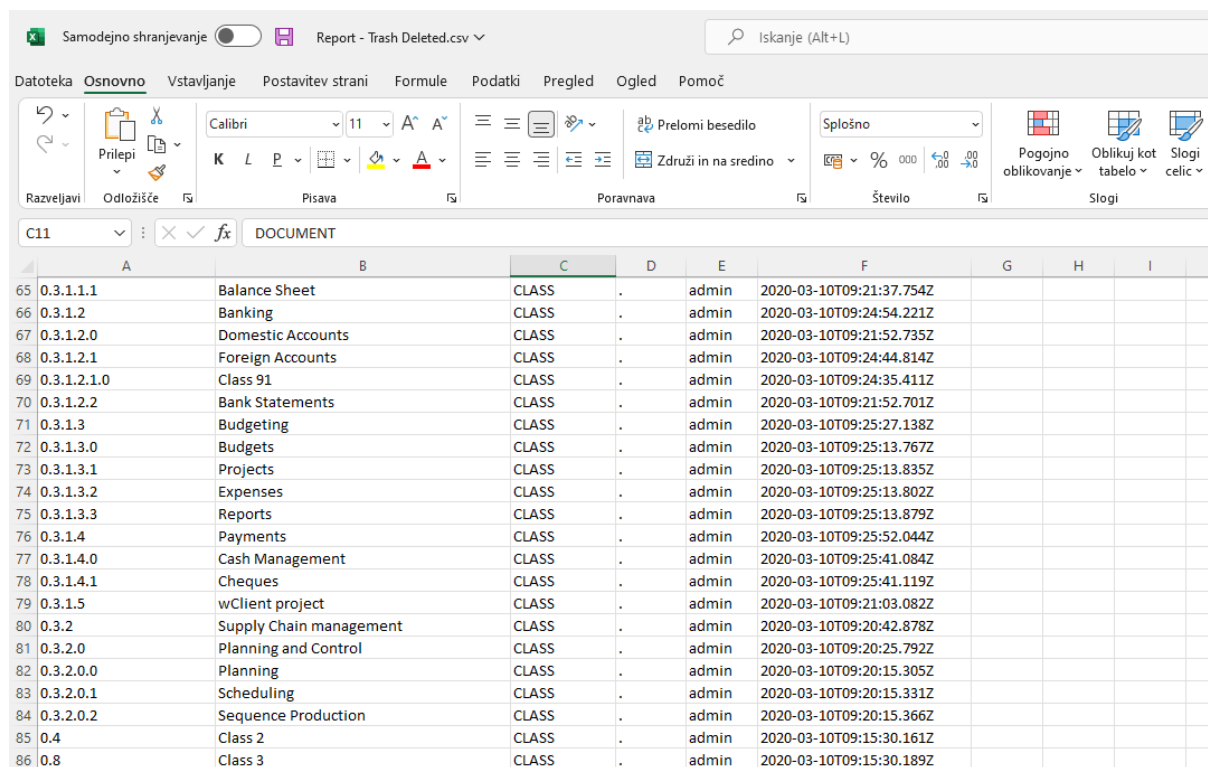
- Print:** 33 sheets of paper
- Destination:** EPSON L3150 Series
- Pages:** All
- Copies:** 1
- Layout:** Portrait
- Color:** Color
- More settings:** (dropdown arrow)

At the bottom of the print settings panel are two buttons: "Print" and "Cancel".

Image 326: A print preview for the delete queue report

4.3.10.12 Exporting the report

By selecting the action “Export” on the created report, a popup menu appears with the possible format (CSV) for saving data. After selecting the CSV format, the deletion queue report opens for the user.



	A	B	C	D	E	F	G	H	I
65	0.3.1.1.1	Balance Sheet	CLASS	.	admin	2020-03-10T09:21:37.754Z			
66	0.3.1.2	Banking	CLASS	.	admin	2020-03-10T09:24:54.221Z			
67	0.3.1.2.0	Domestic Accounts	CLASS	.	admin	2020-03-10T09:21:52.735Z			
68	0.3.1.2.1	Foreign Accounts	CLASS	.	admin	2020-03-10T09:24:44.814Z			
69	0.3.1.2.1.0	Class 91	CLASS	.	admin	2020-03-10T09:24:35.411Z			
70	0.3.1.2.2	Bank Statements	CLASS	.	admin	2020-03-10T09:21:52.701Z			
71	0.3.1.3	Budgeting	CLASS	.	admin	2020-03-10T09:25:27.138Z			
72	0.3.1.3.0	Budgets	CLASS	.	admin	2020-03-10T09:25:13.767Z			
73	0.3.1.3.1	Projects	CLASS	.	admin	2020-03-10T09:25:13.835Z			
74	0.3.1.3.2	Expenses	CLASS	.	admin	2020-03-10T09:25:13.802Z			
75	0.3.1.3.3	Reports	CLASS	.	admin	2020-03-10T09:25:13.879Z			
76	0.3.1.4	Payments	CLASS	.	admin	2020-03-10T09:25:52.044Z			
77	0.3.1.4.0	Cash Management	CLASS	.	admin	2020-03-10T09:25:41.084Z			
78	0.3.1.4.1	Cheques	CLASS	.	admin	2020-03-10T09:25:41.119Z			
79	0.3.1.5	wClient project	CLASS	.	admin	2020-03-10T09:21:03.082Z			
80	0.3.2	Supply Chain management	CLASS	.	admin	2020-03-10T09:20:42.878Z			
81	0.3.2.0	Planning and Control	CLASS	.	admin	2020-03-10T09:20:25.792Z			
82	0.3.2.0.0	Planning	CLASS	.	admin	2020-03-10T09:20:15.305Z			
83	0.3.2.0.1	Scheduling	CLASS	.	admin	2020-03-10T09:20:15.331Z			
84	0.3.2.0.2	Sequence Production	CLASS	.	admin	2020-03-10T09:20:15.366Z			
85	0.4	Class 2	CLASS	.	admin	2020-03-10T09:15:30.161Z			
86	0.8	Class 3	CLASS	.	admin	2020-03-10T09:15:30.189Z			

Image 327: Review of information on entities waiting for deletion in the CSV format

4.3.11 Bulk document capture

Bulk capture is the action of importing a large number of documents without the need for the user to oversee each individual capturing procedure. Bulk capture in the IMiS®/wClient is performed using the “Import” action. By preparing the content correctly before you import it, you can decrease the possibility of encountering errors during the bulk capture procedure. Entities that experience errors during bulk capture are not imported and must be captured manually by the user. For more information on the bulk capture procedure see chapter [Import](#).

4.3.12 Import

The IMiS®/wClient enables the import of entities to the IMiS®/ARChive Server together with their metadata on Audit log and Authenticity evidence if they exist. The entities imported by a user with the ImportExport role have to be compressed (.zip) and prepared in the prescribed XML format.

For more information on roles see chapter [Access in the IMiS®/ARChive Server Manual](#).

Import may be performed into the root class of the classification scheme or into any chosen class or folder. After selecting the action »Import« in the Actions dropdown menu in the command bar or on a given entity, a window opens for selecting the compressed file for entity import (Select file).

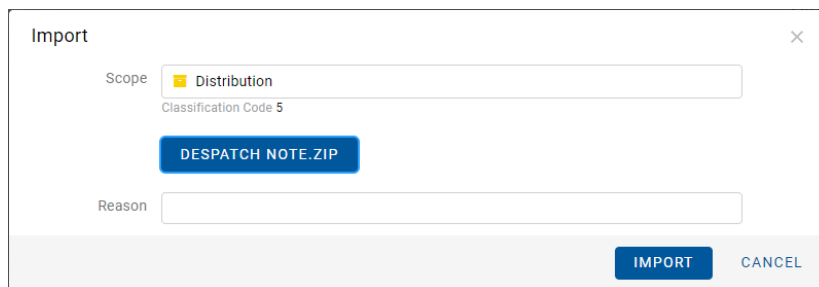


Image 328: Selecting the compressed file with the imported entities

Confirming the action Import starts the entity import.

After the import process is completed, the bottom right part of the view shows an import notification.

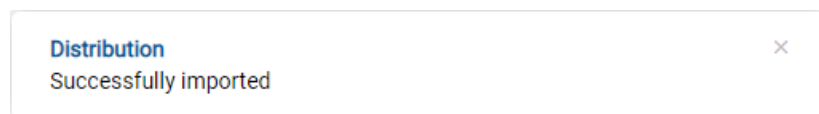


Image 329: Displaying an import notification

Each import action on the IMiS®/ARChive Server is logged in the Import folder contained in the Administration system folder in the left view. This folder can only be accessed by users who have been assigned the Reports role and the appropriate rights to import logs.

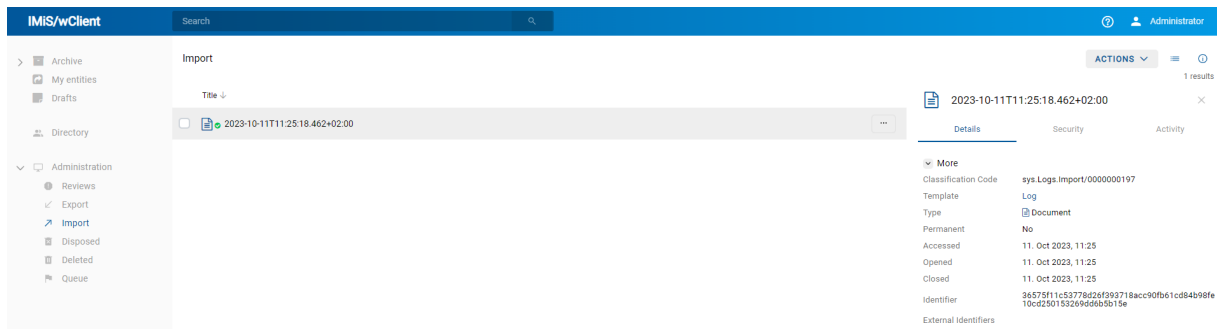


Image 330: Display of the Import folder in the Administration system folder

The IMiS®/wClient enables the review of imported entities on the IMiS®/ARChive Server, including import data. The imported entities reviewed by the user are prepared in the prescribed XML format.

For more information on the file format for import and the file structure see chapter [Format of the import / export file](#).

After creation is completed, the import report is given the status Closed. The user can open the report and perform the following actions:

- Open: opens the selected import report in reading mode.
- Edit: opens the selected entity in editing mode. Enables adding the import report metadata, and modifying and removing the report, metadata and contents.
- Actions: contains commands for various actions on the selected entity:
 - New reference: adding a connection to another report or entity in the classification scheme via a dialog box. For more information see chapter [Reference](#).
 - Move: moving the import report within the classification scheme on the archive.
 - Export: exporting the selected report from the archive.
- Status: modifying the status of the import report via a dialog box which enables giving the reason for the change.
- Security class: modifying the security class of the import report via a dialog box, which requires the user to give the reason for the change.
- Share: copying the link to the selected entity to be shared with other users.
- Delete: deleting the selected import report.

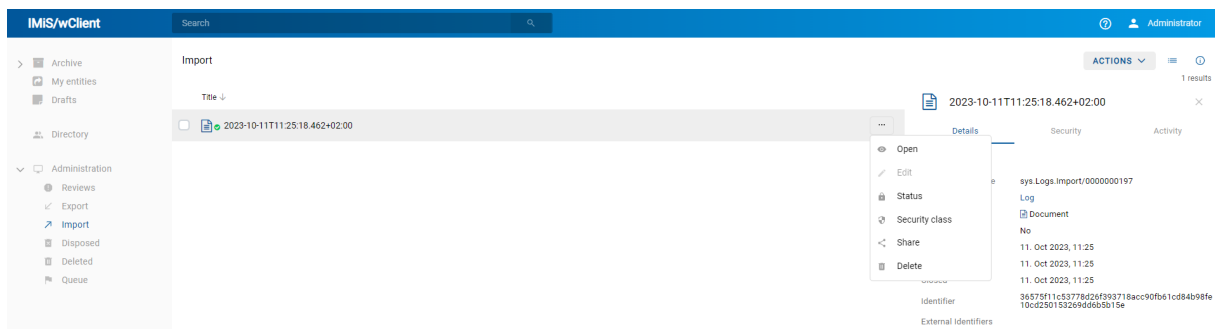


Image 331: Set of available actions on the import/export report

By selecting the popup menu on the import report, the user can choose from the following options:

- Preview: For more information on content preview see chapter [Content preview](#).
- Download: For more information on downloading content see chapter [Downloading content](#).
- Copy: copying the content to another document.
- Share: copying the link to the selected entity to be shared with other users.
- Manage:
 - Queue for Indexing. For more information on indexing content see chapter [Indexing content](#).
 - Queue for Conversion. For more information on content conversion see chapter [Content conversion](#).

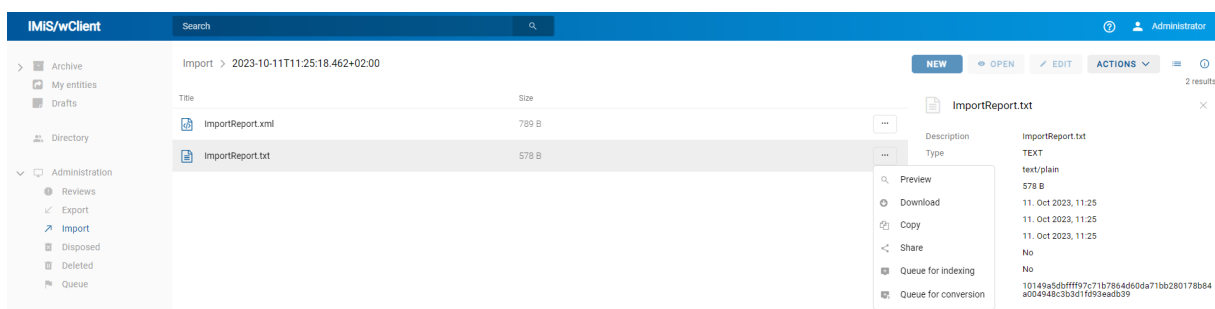


Image 332: Popup menu on a import report

4.3.12.1 Import procedure

At the start of the import procedure, the IMiS®/wClient creates a new document in the folder Import located in the »Administration« system folder. This document contains a report of the import to the archive server.

The title of the document is identical to the date and time of import, in ISO format.

The status of the document is Opened.

During import, the import document is completed with the following three log files:

- ImportReport.xml: XML file that contains:
 - import success rate statistics
 - list of failed import attempts (including the classification codes)
 - list of successfully imported files (including the hash values and full classification codes).
- ImportReport.txt: contains a report for each successfully or unsuccessfully imported entity.
- ErrorReport.txt: contains a report for each failed import attempt including the reason for the import error.

When all entities from the list are imported, the file ImportReport.xml is digitally signed with the selected digital certificate according to the XMLDSIG standard. This ensures that the report's authenticity can be verified.

The status of the document then changes to Closed.

If there is an error while the document is being completed, the import document remains in the system class in its raw form and has the status Open.

If there is an error during the import of an entity on the import list, the sub-entities it contains will not be imported. In case a sub-entity encounters an error, the other sub-entities will still be imported, providing the import of the parent entity was successful.

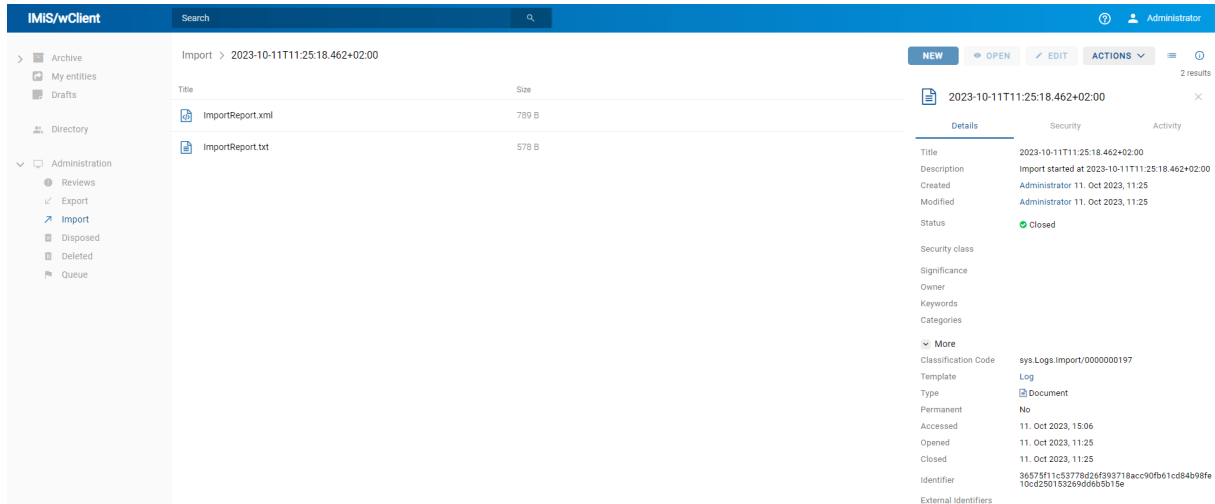


Image 333: Display of the import report in the Import system folder

By selecting the value of the attribute “Get” in the imported entity data (“Transfer audit log”) in open mode, the logged-on user is shown a notification in the bottom bar on the audit log created before importing the entity in the .bin format.

NEW OPEN EDIT ACTIONS 2 results

Despatch note

Details Security Activity

Modified Administrator 13. Mar 2020, 15:11

Status Opened

Security class Confidential

Significance Retain INHERITED

Owner Alex Nelson

Keywords despatch note

Categories distribution logistics

> Email

> Retention

> Save Log

More

Classification Code 5/000003

Template E-mail

Type Document

Permanent No

Accessed 13. Mar 2020, 15:11

Opened 10. Mar 2020, 14:31

Identifier oXixJXGRs-bMMFqMEzBAQqHaA_Yp-B6l

External Identifiers

Transfer date 13. Mar 2020, 14:48

Transfer audit log GET

Transfer system identifier _-a2axJNwA7yNWeVJl9q1XgFqQKQWCEn

Image 334: Information about the audit log created before the entity import

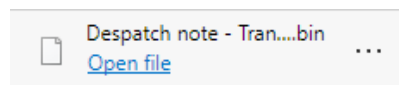


Image 335: Notification on the transfer of the audit log created before the entity import

By opening the file in a suitable application (e.g. Notepad), the user can view the audit log created before the entity import.


```

k?xml version="1.0" encoding="UTF-8"?
<auditlog.query.resultset xsi:schemaLocation="http://www.imis.si/imisarc http://www.imis.si/imisarc/auditlog.xsd" xmlns="http://www.imis.si/imisarc" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <sessions>
    <!--Audit query sessions.-->
    <session id="990" closureReason="0" address="192.168.50.15" internal_address="192.168.80.67" dateTimeOpened="2020-03-10T13:11:59Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64)
    <session id="989" closureReason="0" address="192.168.50.15" internal_address="192.168.80.67" dateTimeOpened="2020-03-10T13:11:43Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64)
    <session id="1041" closureReason="0" address="192.168.80.64" internal_address=":" dateTimeOpened="2020-03-11T09:19:36Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWeb
    <session id="1028" closureReason="0" address="192.168.50.15" internal_address="192.168.80.67" dateTimeOpened="2020-03-11T08:02:54Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64)
    <session id="1084" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::5" dateTimeOpened="2020-03-12T06:37:43Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0
    <session id="1082" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::5" dateTimeOpened="2020-03-12T06:32:11Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0
    <session id="1083" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::5" dateTimeOpened="2020-03-12T06:37:21Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0
    <session id="1086" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::5" dateTimeOpened="2020-03-12T07:21:15Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0
    <session id="1087" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::5" dateTimeOpened="2020-03-12T07:27:50Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0
    <session id="1085" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::5" dateTimeOpened="2020-03-12T07:20:54Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0
    <session id="1090" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::8" dateTimeOpened="2020-03-12T08:04:30Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0
    <session id="1089" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::8" dateTimeOpened="2020-03-12T07:53:47Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0
    <session id="1088" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::8" dateTimeOpened="2020-03-12T07:53:43Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0
    <session id="1134" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::4" dateTimeOpened="2020-03-13T09:35:50Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0
    <session id="1135" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::4" dateTimeOpened="2020-03-13T09:35:50Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0
  </sessions>
  <events>
    <!--Audit query events.-->
    <!--Sort compare function is QuerySorter::Compare08) TS-->
    <event sessionId="1134" type="3" seq="76" dateTime="2020-03-13T10:16:55Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn"/>
    <event sessionId="1134" type="9" seq="77" dateTime="2020-03-13T10:25:34Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn" message="Changed properties: sys:Description, sy
    <event sessionId="1134" type="4" seq="78" dateTime="2020-03-13T10:25:34Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn"/>
    <event sessionId="1134" type="12" seq="79" dateTime="2020-03-13T10:27:00Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn" message="Security Class change occurred from 'U
    <event sessionId="1134" type="5" seq="80" dateTime="2020-03-13T10:27:27Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn" message="Full classification code: 'C-2'D=000008
    <cat1"];[sys:eml:MessageId:&quot;1;OF00A238CE.D687EC98-0MC1258527.004801A1-C1258527.00485070@LocalDomain&quot;];[sys:eml:Date:&quot;2020-03-10T14:10:25Z&quot;];[sys:eml:From:&quot;vesna.zunko@imis
    <event sessionId="1135" type="2" seq="81" dateTime="2020-03-13T10:43:43Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn"/>
    <event sessionId="1135" type="2" seq="82" dateTime="2020-03-13T10:43:50Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn"/>
    <event sessionId="1135" type="5" seq="83" dateTime="2020-03-13T10:44:37Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn" message="Full classification code: 'C-5'D=IS-100
    <event sessionId="1135" type="3" seq="84" dateTime="2020-03-13T10:45:03Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn"/>
    <event sessionId="1135" type="3" seq="85" dateTime="2020-03-13T10:45:07Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn"/>
    <event sessionId="1135" type="22" seq="86" dateTime="2020-03-13T10:45:56Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn" message="Certificate of Approval.tif [InHmhW8UX
    <event sessionId="1135" type="4" seq="87" dateTime="2020-03-13T10:45:56Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn"/>
    <event sessionId="1134" type="2" seq="88" dateTime="2020-03-13T10:45:56Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn"/>
    <event sessionId="1134" type="3" seq="89" dateTime="2020-03-13T11:22:30Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn" message="Move appropriate document"/>
    <event sessionId="1134" type="16" seq="90" dateTime="2020-03-13T11:22:30Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn" message="Content Shipping note [iox1RY46NeRYaQK
    <event sessionId="1135" type="2" seq="91" dateTime="2020-03-13T11:24:03Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn"/>
    <event sessionId="1135" type="3" seq="92" dateTime="2020-03-13T11:40:40Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn"/>
    <event sessionId="1135" type="3" seq="93" dateTime="2020-03-13T11:40:54Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn"/>
    <event sessionId="1135" type="16" seq="94" dateTime="2020-03-13T11:58:01Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn" message="Content Shipping note [iox1RY46NeRYaQK
    <event sessionId="1135" type="4" seq="95" dateTime="2020-03-13T11:58:01Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn"/>
    <event sessionId="1134" type="2" seq="96" dateTime="2020-03-13T11:58:02Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn"/>
    <event sessionId="1134" type="17" seq="97" dateTime="2020-03-13T11:58:05Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn" message="Certificate of Approval.tif [InHmhW8UX
    <event sessionId="1135" type="2" seq="98" dateTime="2020-03-13T11:58:15Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn"/>
    <event sessionId="1134" type="2" seq="99" dateTime="2020-03-13T12:56:15Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn"/>
    <event sessionId="1135" type="3" seq="100" dateTime="2020-03-13T13:01:15Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn"/>
    <event sessionId="1135" type="16" seq="101" dateTime="2020-03-13T13:01:15Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn" message="Content Shipping note [iox1RY46NeRYaQ
    <event sessionId="1135" type="2" seq="102" dateTime="2020-03-13T13:28:42Z" classificationCode="C-8'D-IS-100-419" context="-_a2axJNwA7yMwV19q1XgFqQKQKcEn"/>
  </events>
</auditlog.query.resultset>

```

Image 336: Audit log created before the entity import

4.3.13 Export

Users who have the ImportExport role can export the complete classification scheme or any of its individual parts. Each entity is exported with all its metadata and content, while export of the audit log and additional metadata is optional. User-added metadata is not part of the entity's own metadata and is employed only for the purposes of the archiving procedure. For more information on the export file format and file structure see chapter [Format of the import / export files](#).

For more information on server roles see chapter [Access in the IMiS®/ARChive Server Manual](#).

4.3.13.1 Exporting the entire classification scheme

The user begins the procedure of exporting the entire classification scheme by selecting the Actions command in the command bar and the Export action in the popup menu before selecting the root class.

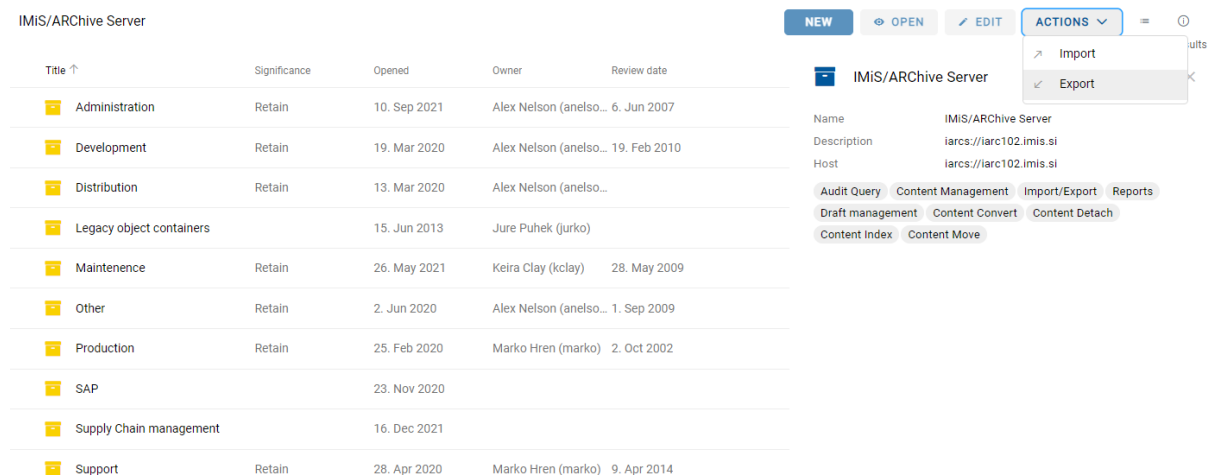


Image 337: Selecting the »Export« command at the level of the entire classification scheme

Opens a dialog box in which the ZIP and ASIC tabs contain the settings of the following export parameters:

- Scope: the user checks whether they want to perform an export on the entity currently selected in the classification scheme.
- Option: selecting additional export options:
 - Recursive
 - Export parents.
- Include: the user can include or exclude the following export settings:
 - Entity type: classes folders, documents.
 - Activity: the audit log of the individual exported entity.
 - Authenticity evidence: evidence on the entity's authenticity, if entity authenticity evidence has been created on the archive.
- Select metadata file: additional metadata from the XML file, which will be included in the export. For a description of the structure of the additional metadata file see chapter [Format of the additional metadata export file](#).

Export
×

Format ZIP ASIC CSV

Export to ZIP file exports selected entities elements and optionally its subtentities

Scope

Options Recursive
 Export parents

Include Classes Folders Documents

Reason

Export
Cancel

Export
×

Format ZIP ASIC CSV

Export to ASIC-E container exports the entity's content elements with their authenticity evidence

Scope

Options Recursive
 Export parents

Include Classes Folders Documents

Reason

Export
Cancel

Image 338: Setting the export parameters on the entire archive in the ZIP and ASIC formats

The CSV tab contains the export parameters settings, where the user selects the properties. The selected properties match those shown in the entities table. In the dialog box the user can add or remove additional properties.

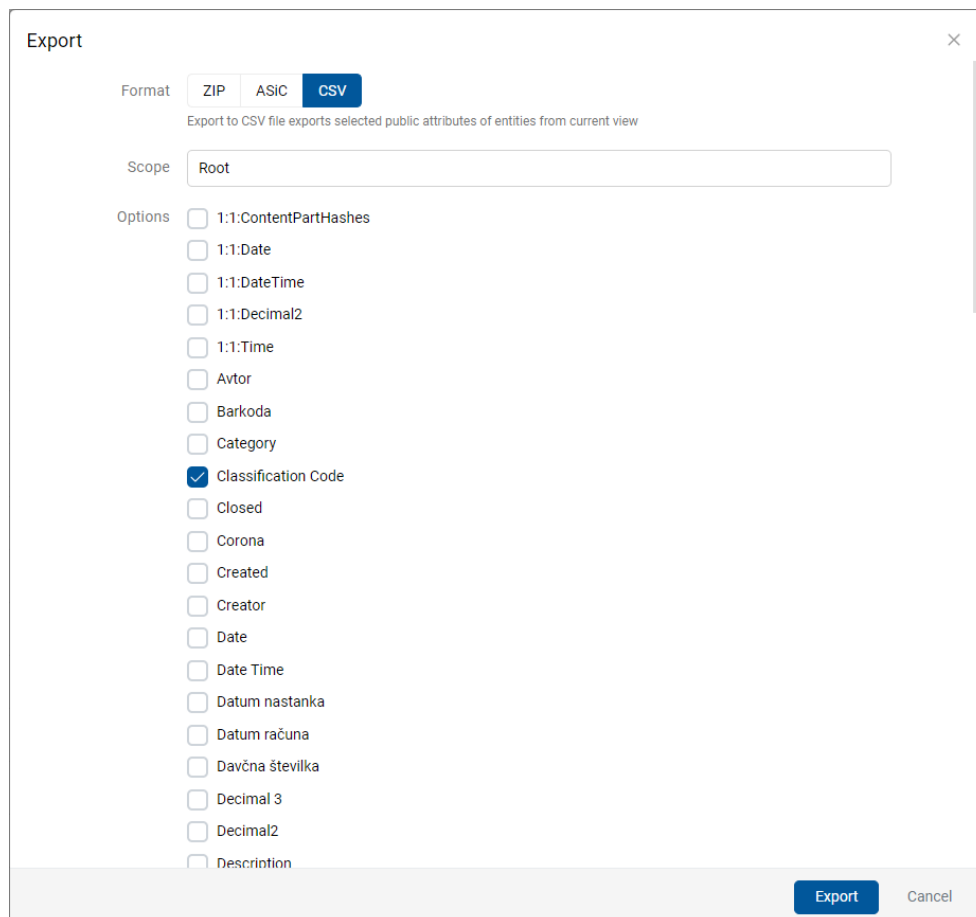


Image 339: Setting the export parameters of the entire archive in the CSV format

After completing the export of the entire classification scheme, the user is shown a notification in the bottom bar about saving the export file (IMiS_ARChive Server.zip).

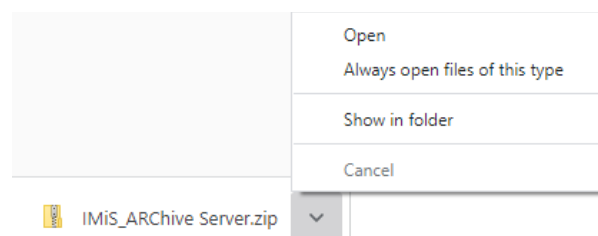


Image 340: Notification about saving a file of exported entities of the entire classification scheme

By selecting the Open command, export reports open for the user.

Name	Type	Compressed size	Password ...	Size	Ratio	Date modified
ExportData	File folder					21.09.2022 10:11
ExportReport.txt	Text Document	1 KB	No	2 KB	76%	21.09.2022 10:11
ExportReport.xml	XML Document	1 KB	No	4 KB	69%	21.09.2022 10:11

Image 341: Information about the export of the entire classification scheme

By selecting the ExportReport, the user is shown a more detailed notification about the export.

```
Exporting scope:'3', subject:'admin', recursive:true, exportParents:false, classes:true, folders:true, documents:true, auditLog:true, evidence:true

2020-09-22T16:08:56.827+0200 - Exported Class '3' into file ExportData/class_1.xml
2020-09-22T16:08:57.254+0200 - Exported Document '3/000033' into file ExportData/document_1.xml
2020-09-22T16:08:57.397+0200 - Exported Document '3/000034' into file ExportData/document_2.xml
2020-09-22T16:08:58.005+0200 - Exported Document '3/000042' into file ExportData/document_3.xml
2020-09-22T16:08:58.379+0200 - Exported Document '3/000044' into file ExportData/document_4.xml
2020-09-22T16:08:58.444+0200 - Exported Class '3.31' into file ExportData/class_2.xml
2020-09-22T16:08:58.578+0200 - Exported Document '3.31/000001' into file ExportData/document_5.xml
2020-09-22T16:08:58.679+0200 - Exported Folder '3-IS' into file ExportData/folder_1.xml
2020-09-22T16:08:59.094+0200 - Exported Document '3-IS/000002' into file ExportData/document_6.xml
2020-09-22T16:08:59.223+0200 - Exported Document '3-IS/000003' into file ExportData/document_7.xml
2020-09-22T16:08:59.314+0200 - Exported Folder '3-IS-IS' into file ExportData/folder_2.xml
2020-09-22T16:08:59.493+0200 - Exported Document '3-IS-IS/000001' into file ExportData/document_8.xml
2020-09-22T16:08:59.630+0200 - Exported Document '3-IS/IS-212' into file ExportData/document_9.xml
2020-09-22T16:08:59.735+0200 - Exported Document '3-IS/IS-514' into file ExportData/document_10.xml
2020-09-22T16:08:59.854+0200 - Exported Document '3-IS/IS-632' into file ExportData/document_11.xml
2020-09-22T16:08:59.976+0200 - Exported Document '3-IS/IS-710' into file ExportData/document_12.xml
2020-09-22T16:09:00.093+0200 - Exported Document '3-IS/Social-2020' into file ExportData/document_13.xml
2020-09-22T16:09:00.161+0200 - Exported Folder '3-IS-417' into file ExportData/folder_3.xml
2020-09-22T16:09:00.495+0200 - Exported Document '3/IS-CC-027' into file ExportData/document_14.xml
2020-09-22T16:09:00.874+0200 - Exported Document '3/IS-EXP-1000' into file ExportData/document_15.xml

Class entities: OK(2) Fail(0)
Folder entities: OK(3) Fail(0)
Document entities: OK(15) Fail(0)
```

Image 342: Display of a more detailed notification about the export of the entire classification scheme

4.3.13.2 Exporting of the classification scheme

The procedure of exporting an individual part of the classification scheme begins by selecting an entity in the classification scheme or from the list of entities.

Image 343: Selecting the Export action on the selected entity

After selecting the Actions command in the command bar and the Export action in the popup menu, the user is shown a dialog box for setting the export parameters.

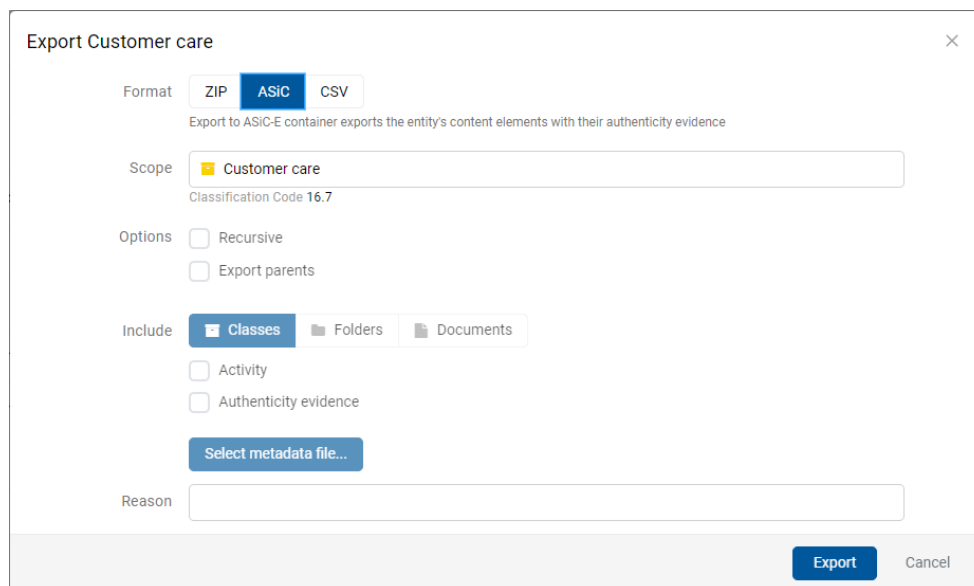
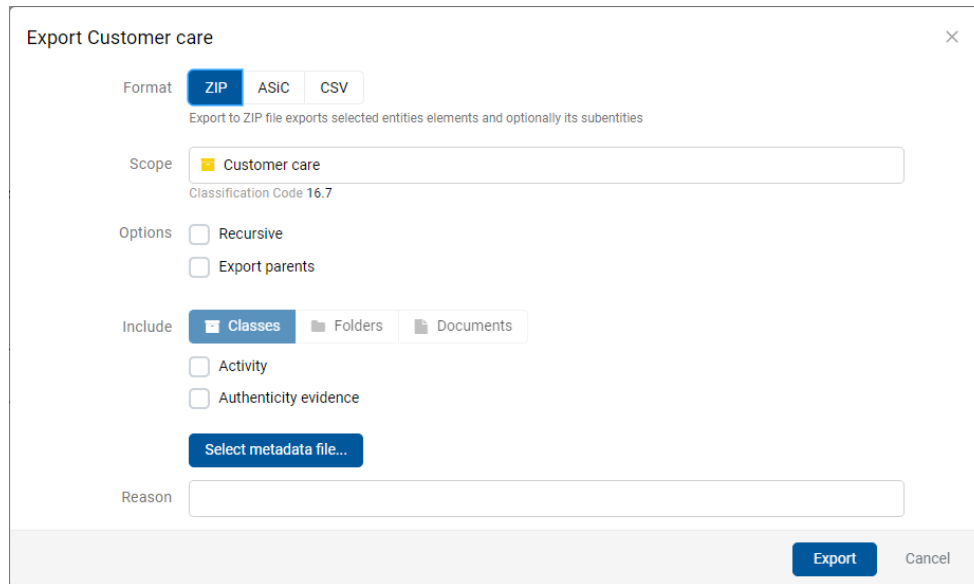
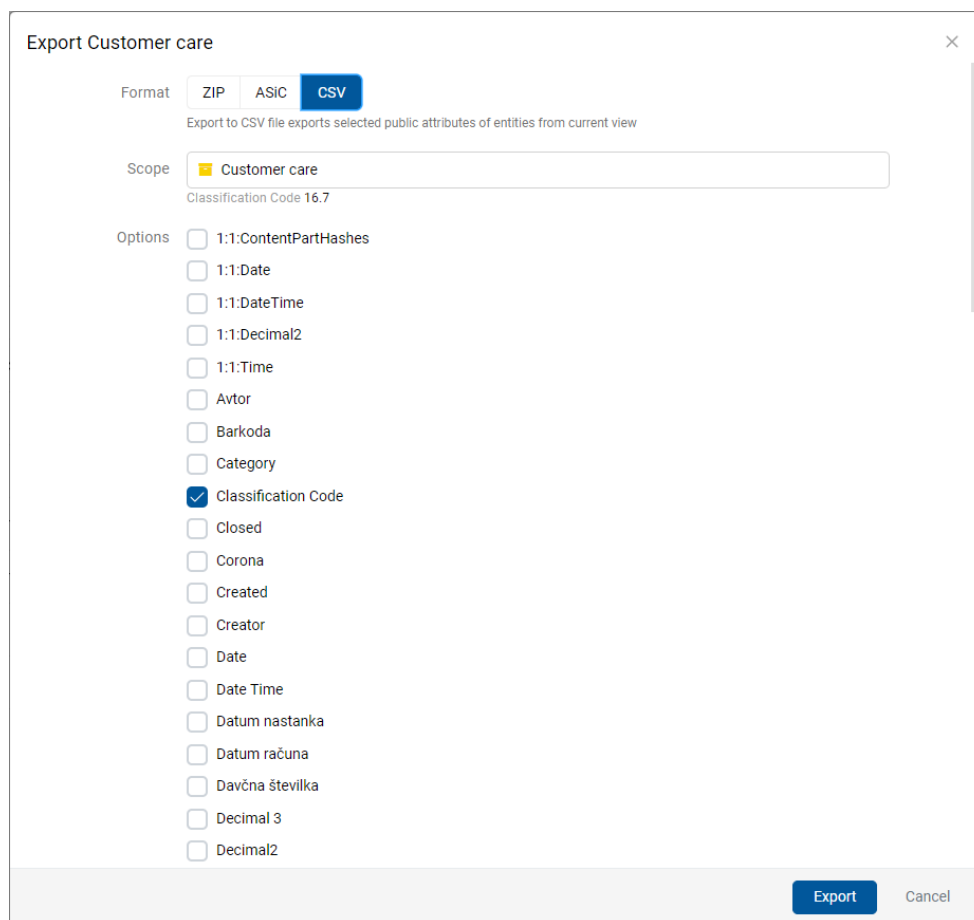


Image 344: Setting the export of the entity tree in the ZIP and ASiC formats



Export Customer care

Format ZIP ASIC CSV

Export to CSV file exports selected public attributes of entities from current view

Scope

Classification Code 16.7

Options

- 1:1.ContentPartHashes
- 1:1.Date
- 1:1.DateTime
- 1:1.Decimal2
- 1:1.Time
- Avtor
- Barkoda
- Category
- Classification Code
- Closed
- Corona
- Created
- Creator
- Date
- Date Time
- Datum nastanka
- Datum računa
- Davčna številka
- Decimal 3
- Decimal2

Image 345: Setting the export of the entity tree in CSV format

The settings are described in the chapter [Exporting the entire classification scheme](#).

By selecting the action "Export", the export process begins. The user can cancel the export process by selecting the "Cancel" command.

The entities are exported in the desired format to the default directory Downloads. The user can access the export details from the notification bar by selecting the action Open in the popup menu.

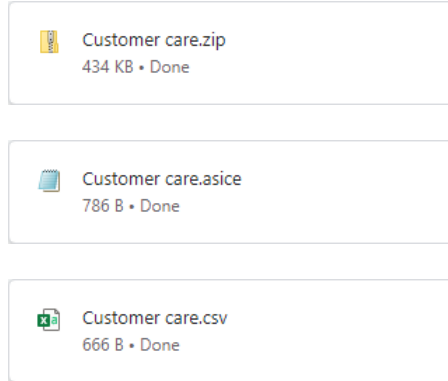


Image 346: Notification about saving a file of individual exported entities

Local Disk (C:) > Temp > Customer care.zip >

Name	Type	Compressed size	Password ...	Size	Ratio	Date modified
ExportData	File folder					5.10.2023 14:15
ExportReport.txt	Text Document	1 KB	No	1 KB	69%	5.10.2023 14:15
ExportReport.xml	XML Document	4 KB	No	6 KB	48%	5.10.2023 14:15

Image 347: Example of data on exporting a part of the classification scheme in the ZIP format

Every export action from the IMiS®/ARChive Server is recorded in the Export folder located in the Administration system folder.

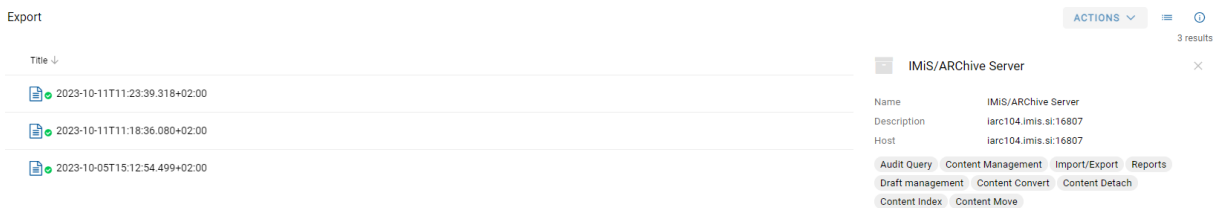


Image 348: Display of the Export folder in the Administration system folder and the document selected for export

The IMiS®/wClient enables the review of exported entities on the IMiS®/ARChive Server, including export data. The exported entities reviewed by the user are prepared in the prescribed XML format.

For more information on the file format for export and the file structure see chapter [Format of the import / export file](#).

After creation is completed, the export report is given the status Closed. The user can open the report and perform the following actions:

- **Open:** opens the selected export report in reading mode.
- **Edit:** opens the selected entity in editing mode. Enables adding the export report metadata, and modifying and removing the report, metadata and contents.
- **Actions:** contains commands for various actions on the selected entity:
 - **New reference:** adding a connection to another report or entity in the classification scheme via a dialog box. For more information see chapter [Reference](#).
 - **Move:** moving the export report within the classification scheme on the archive.
 - **Export:** exporting the selected report from the archive.
- **Status:** modifying the status of the export report via a dialog box which enables giving the reason for the change.
- **Security class:** modifying the security class of the export report via a dialog box, which requires the user to give the reason for the change.
- **Share:** copying the link to the selected entity to be shared with other users.
- **Delete:** deleting the selected export report.

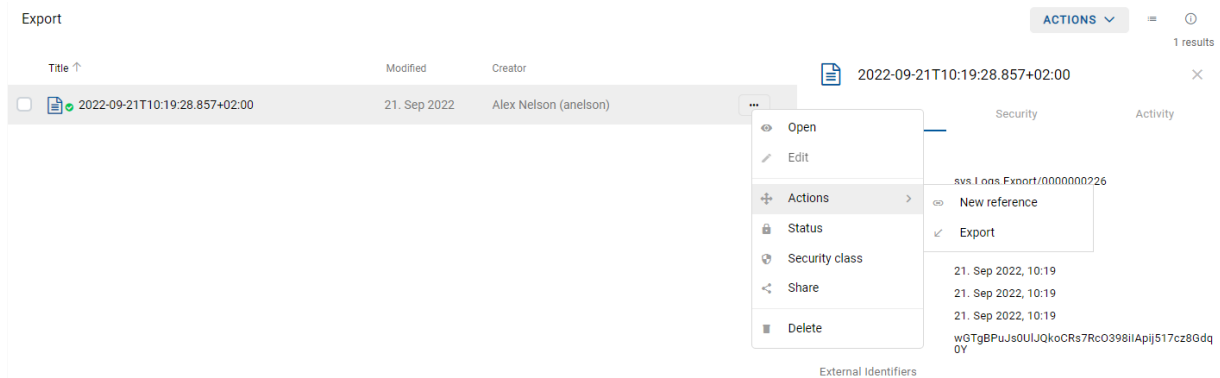


Image 349: Set of available actions on the export report

By selecting the popup menu on the export report, the user can choose from the following options:

- Preview: For more information on content preview see chapter [Content preview](#).
- Download: For more information on downloading content see chapter [Downloading content](#).
- Copy: copying the content to another document.
- Share: copying the link to the selected export report to be shared with other users.
- Manage:
 - Queue for Indexing. For more information on indexing content see chapter [Indexing content](#).
 - Queue for Conversion. For more information on content conversion see chapter [Content conversion](#).

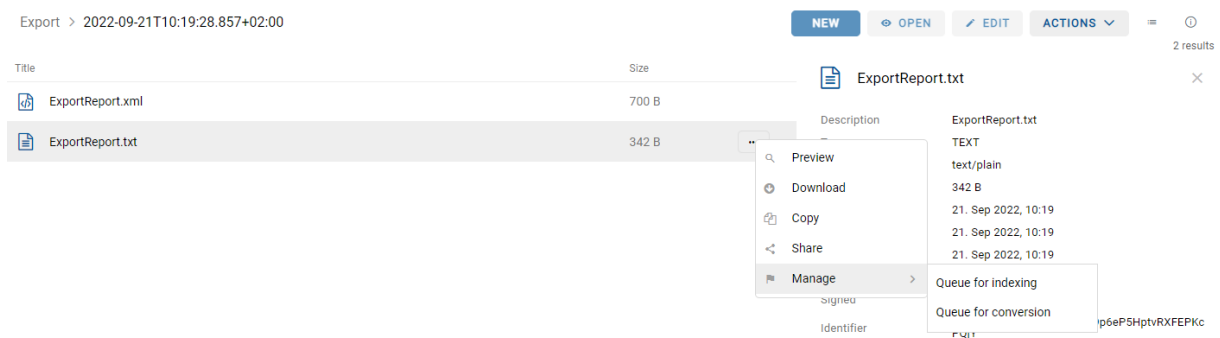


Image 350: Popup menu on the export report

4.3.13.3 Export procedure

At the start of the export procedure, the IMiS®/wClient creates a new document in the folder Export located in the Administration system folder. This document contains a report on the export from the archive server.

The title of the document is identical to the date and time of export, in ISO format. The status of the document is Opened.

During exporting, the export document is completed with the following two or three log files:

- ExportReport.xml: XML file that contains:
 - Statistics of successfully and unsuccessfully exported entities.
 - List of failed export attempts (including the classification codes).
 - List of successfully exported files (including hash values and full classification codes).

- **ExportReport.txt:** which contains a report for each successfully or unsuccessfully exported entity.
- **ExportReport_ERROR.txt:** which contains a report for each failed export attempt, including the error received.

```

← 2020-07-03T08:53:55.743+02:00 > ErrorReport.txt
1 2020-07-03T08:59:04.922+02:00 - ERROR: Unable to export '1/000121' content part 'Ho_27p2kZLI60-XK0ETp66vS4Lskgde'. Error java.net.SocketException: Connection reset Exception class org.apache.catalina.connector.CI
2 at com.lmis.storageconnector.services.utils.Utils.write(Utils.java:123)
3 at com.lmis.storageconnector.services.utils.Utils.write(Utils.java:114)
4 at com.lmis.storageconnector.services.app.EntityExport.exportContentPart(EntityExport.java:458)
5 at com.lmis.storageconnector.services.app.EntityExport.exportEntity(EntityExport.java:729)
6 at com.lmis.storageconnector.services.app.EntityExport.exportAllSubEntities(EntityExport.java:259)
7 at com.lmis.storageconnector.services.app.EntityExport.exportAllSubEntities(EntityExport.java:262)
8 at com.lmis.storageconnector.services.app.EntityExport.exportEntities(EntityExport.java:385)
9 at com.lmis.storageconnector.services.app.EntityExport.build(EntityExport.java:929)
10 at com.lmis.storageconnector.services.io.rest.resource.ArchiveResource$4.write(ArchiveResource.java:2871)
11 Caused by: Exception class java.net.SocketException: Connection reset
12 at com.lmis.storageconnector.services.utils.Utils.write(Utils.java:123)
13 at com.lmis.storageconnector.services.utils.Utils.write(Utils.java:114)
14 at com.lmis.storageconnector.services.app.EntityExport.exportContentPart(EntityExport.java:458)
15 at com.lmis.storageconnector.services.app.EntityExport.exportEntity(EntityExport.java:729)
16 at com.lmis.storageconnector.services.app.EntityExport.exportAllSubEntities(EntityExport.java:259)
17 at com.lmis.storageconnector.services.app.EntityExport.exportAllSubEntities(EntityExport.java:262)
18 at com.lmis.storageconnector.services.app.EntityExport.exportEntities(EntityExport.java:385)
19 at com.lmis.storageconnector.services.app.EntityExport.build(EntityExport.java:929)
20 at com.lmis.storageconnector.services.io.rest.resource.ArchiveResource$4.write(ArchiveResource.java:2871)
21 2020-07-03T08:59:04.926+02:00 - ERROR: Unable to export '1/000121' content part 'Ho_27p2kZLI60-XK0ETp66vS4Lskgde'. Error java.net.SocketException: Broken pipe (Write failed) Exception class org.apache.catalina.co
22 at com.lmis.storageconnector.services.app.EntityExport.exportContentPart(EntityExport.java:467)
    
```

Image 351: An example of an error report in the export procedure

The status of the document then changes to Closed.

If there is an error while the export document is being completed, it will remain in the system class in its raw form and with an Open status.

If there is an error during the export of an entity queued for export, the sub-entities it contains will not be exported. In case a sub-entity encounters an error during import, the other sub-entities will still be exported, providing the export of the parent entity was successful.

The screenshot shows a file management interface with a search bar at the top. Below the search bar, there is a list of files. Two files are listed: 'ExportReport.xml' (603 B, 18. Aug 2021) and 'ExportReport.txt' (350 B, 18. Aug 2021). The 'ExportReport.txt' file is selected, and its details are shown on the right. The details include the title '2021-08-18T15:51:25.852+02:00', description 'Export started at 2021-08-18T15:51:25.852+02:00', created and modified dates (18. Aug 2021, 15:52), and status 'Closed'. The security class is 'sys.Logs.Export/0000000094'. The template is 'Log', and the type is 'Document'. The permanent status is 'No', and it was accessed on 8. Sep 2021, 15:52, opened on 18. Aug 2021, 15:52, and closed on 18. Aug 2021, 15:52. The identifier is '_JHKKWjngB4bdM4iIke2bFJsre1hLDi'.

Image 352: Export report

By selecting the ExportReport, the user is shown a more detailed notification about the export.

```
← 2021-08-18T15:51:25.852+02:00 > ExportReport.txt
1 Exporting scope:'30.IS-999', subject:'admin', recursive:true, exportParents:false, classes:true, folders:true, documents:true, auditLog:true, evidence:true
2
3 2021-08-18T15:51:25.980+02:00 - Exported Class '30.IS-999' into file ExportData/class_1.xml
4
5 Class entities: OK(1) Fail(0)
6 Folder entities: OK(0) Fail(0)
7 Document entities: OK(0) Fail(0)
8
```

Image 353: Display of a more detailed notification about the export

***Warning:** The user can export different entities into the selected export folder several times, without having to delete previous export files. When saving exported entities into the selected folder, the previous export files are overwritten.*

4.3.14 Deletion of an entity

To execute a delete action, the user must have the Delete right on the selected entity.

To learn how to check the effective rights of a user see chapter [Entity information](#).

The IMiS®/wClient enables two ways of removing an entity from the classification scheme:

- Immediate deletion.
- Marking an entity for later deletion (delete queue).

4.3.14.1 Immediate deletion of an entity

Prior to deletion, the user has to make sure the classes or folders he is about to delete do not contain entities. Entities namely cannot be deleted. The same is valid for all closed entities (the value of the Status attribute is Closed).

The user can delete an entity by selecting the Actions command in the command bar and Delete in the popup menu.

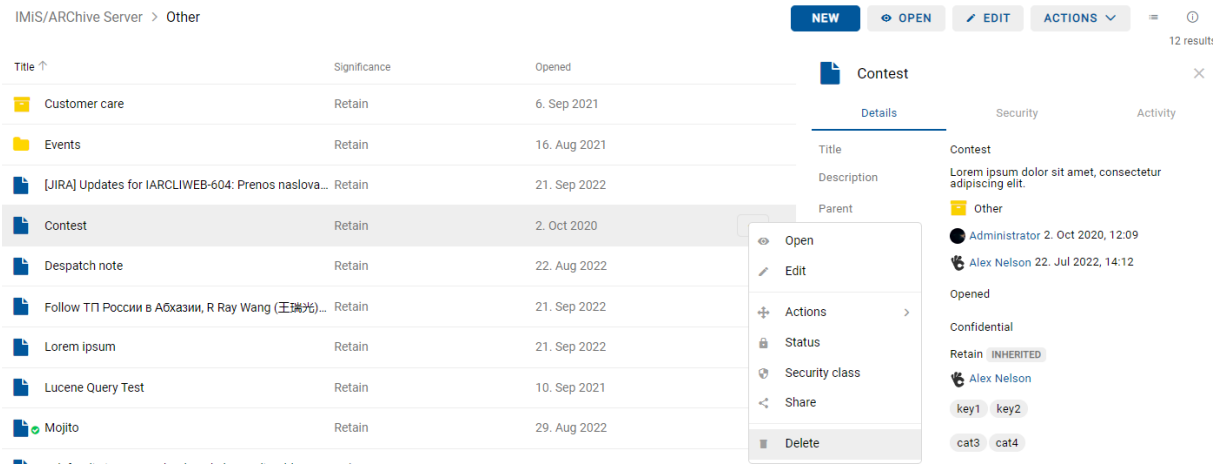


Image 354: Selecting the Delete command

A dialog box opens for giving the Reason to delete and the Description, which are required.

The screenshot shows a 'Delete' dialog box with the following fields:

- Entity: Contest
- Classification Code: 16/IS-563
- Description*: Lorem ipsum dolor sit amet, consectetur adipiscing elit.
- Reason to delete*: In egestas malesuada lectus eget efficitur.

Buttons: Delete, Cancel

Image 355: A dialog box for deleting an individual entity

When deleting multiple entities simultaneously, the user marks the entities and in the menu on one of the entities selects the action Delete. In the dialog box the user gives the reason for the deletion and the potentially missing entity description for each entity.

The dialog box is titled "Delete" and contains a checkbox labeled "Description for all entities" which is checked. Below this are four rows of entity information:

- Entity: Certificate of origin, Classification Code: 3/000035
- Entity: Customs documentation, Classification Code: 3/000032
- Entity: Despatch note, Classification Code: 3/000033
- Entity: Shipping release note, Classification Code: 3/000034

At the bottom, there are two input fields: "Description*" with the value "Administration" and "Reason to delete*" with the value "Obsolete documents". At the very bottom right are two buttons: "DELETE" and "CANCEL".

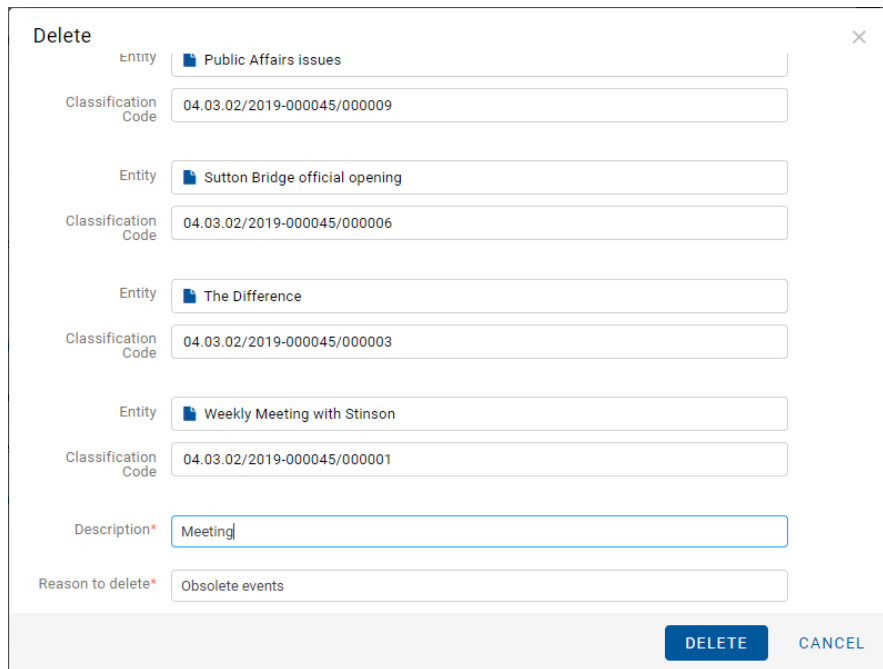
Image 356: A dialog box for deleting multiple entities

The user has the option of defining a single description for all selected entities (“Description for all entities”). The user does that by checking the checkbox.

This is the same dialog box as in Image 356, but with a red rectangular box highlighting the checked checkbox labeled "Description for all entities" in the top right corner.

Image 357: Selecting a single description for all entities selected for deletion

Before confirming the deletion, the user defines a single description for all selected entities (“Description”) and the “Reason to delete”.



The screenshot shows a 'Delete' dialog box with the following fields:

- Entity: Public Affairs issues
- Classification Code: 04.03.02/2019-000045/000009
- Entity: Sutton Bridge official opening
- Classification Code: 04.03.02/2019-000045/000006
- Entity: The Difference
- Classification Code: 04.03.02/2019-000045/000003
- Entity: Weekly Meeting with Stinson
- Classification Code: 04.03.02/2019-000045/000001
- Description*: Meeting
- Reason to delete*: Obsolete events

Buttons: DELETE, CANCEL

Image 358: Selecting a single description for all selected entities

After the reason for the deletion has been entered, the command OK, or Delete in the case of deleting multiple entities, is enabled.

4.3.14.2 Marking an entity for later deletion

If the user has the Write access right on the entity but does not have the Delete access right, user is able to mark the entity for later deletion. For the display of a user's current effective access rights see chapter [The Security tab](#).

All types of entities can be marked for later deletion. The procedure is as follows:

1. User finds and selects the entity he wishes to mark for later deletion.
2. By choosing the Edit command, the selected entity is opened in editing mode.
3. In the first tab Details, select the Significance attribute. Change the value of this attribute to Delete in the pick list of possible attribute values.
4. When the value of the Significance attribute is changed, save the entity using the Save command. The new value Delete is then stored to the server.

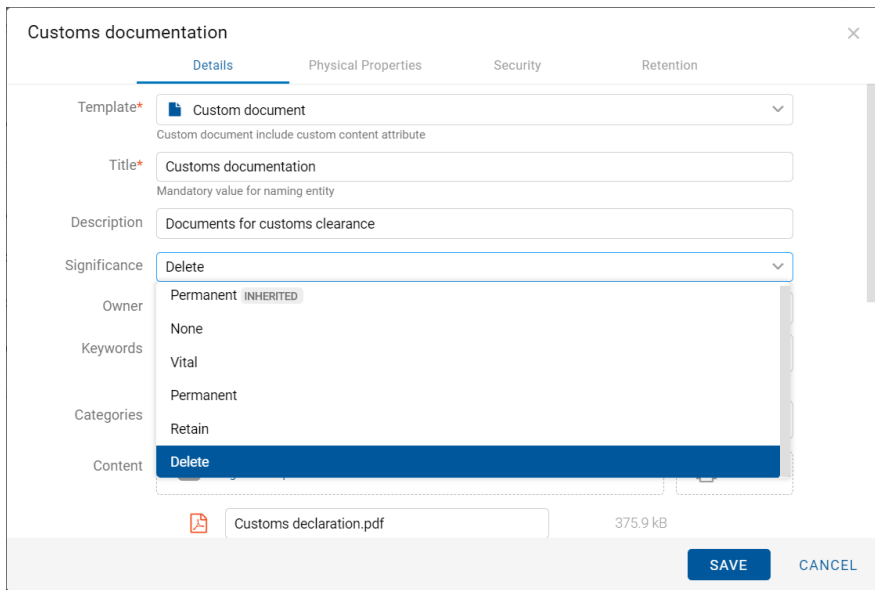


Image 359: Marking an entity for later deletion

4.3.14.3 Managing the delete queue

Entities whose Significance attribute is set to Delete appear in the list of entities waiting for deletion. This list is found in the Queue folder in the Trash folder in the Administration« system folder.

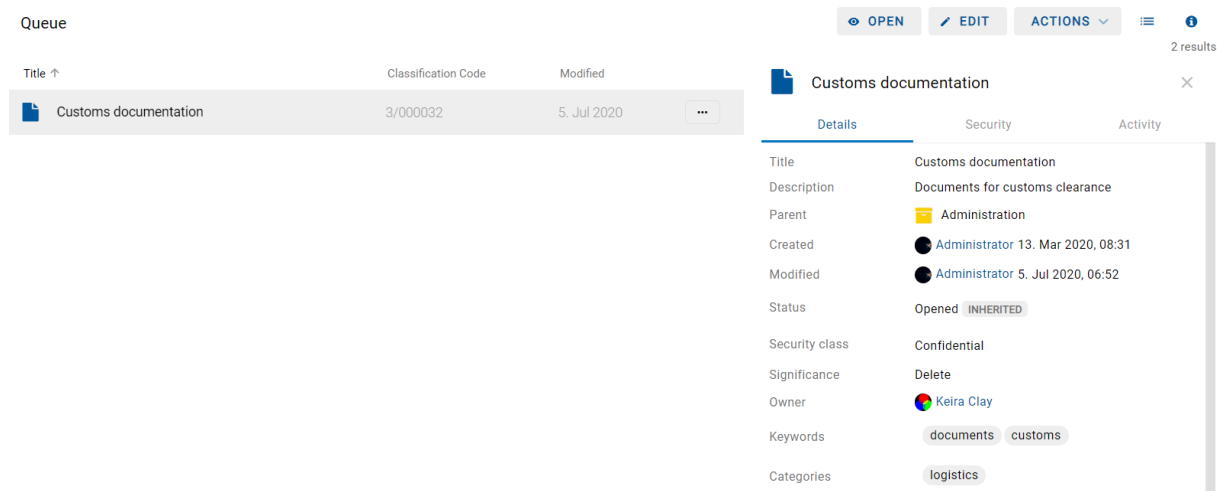


Image 360: A list of entities suggested for deletion in the Delete queue list folder

By selecting the Queue folder, the central view shows all the entities that were marked for deletion by various users.

Besides the title of the entity, the central view also shows the user information about the classification code, description and the last modified date.

A user is responsible for checking the exact content of the entities and making the final decision whether or not to delete them. If deletion is warranted, the entity is deleted by choosing the Delete command in the popup menu on the entity selected from the list.

For more information on deletion procedure see chapter [Immediate deletion of an entity](#).

If a user decides the entity should not be deleted, user can remove it from the delete queue. This is done by changing the Significance attribute of the entity to a value other than the Delete value.

The procedure for removing an entity from the delete queue list is as follows:

1. A user selects the entity to remove from the list.
2. By choosing the Edit command in the top command bar, the selected entity is opened in editing mode.
3. In the first tab Details, the user selects the Significance attribute.
4. The value of this attribute has to be changed from Delete to a different value in the pick list of possible values.
5. When the value is changed, the entity is saved using the Save command.

The new value of the Significance attribute is stored to the server.

The screenshot shows a web application window titled "Customs documentation" with a close button (X) in the top right corner. The window has four tabs: "Details" (selected), "Physical Properties", "Security", and "Retention". The "Details" tab contains the following fields and options:

- Template***: A dropdown menu showing "Custom document" with a small icon to the left and a downward arrow to the right. Below it, the text "Custom document include custom content attribute" is visible.
- Title***: A text input field containing "Customs documentation". Below it, the text "Mandatory value for naming entity" is visible.
- Description**: A text input field containing "Documents for customs clearance".
- Significance**: A dropdown menu with "Retain" selected. The dropdown list is open, showing the following options: "Permanent (INHERITED)", "None", "Vital", "Permanent", "Retain" (highlighted in blue), and "Delete".
- Owner**: A text input field containing "Permanent".
- Keywords**: A text input field containing "Vital".
- Categories**: A text input field containing "Permanent".
- Content**: A text input field containing "Delete".

At the bottom of the form, there is a file upload section with a PDF icon, a text input field containing "Customs declaration.pdf", and a file size indicator "375.9 kB". At the bottom right of the window, there are two buttons: "SAVE" and "CANCEL".

Image 361: Removing an entity from the delete queue list

Once you refresh the delete queue list, the entity will no longer appear there. You can still find it in its old location in the classification scheme.

4.3.14.4 Deleted entities

Each entity deleted by the user is located in its basic form in the Deleted subfolder of the Trash folder in the Administration system folder.

By selecting the Trash folder, the central view will display all the deleted entities.

The list of deleted entities shows the following entity information:

- Title: the title of the deleted entity.
- Classification code: the classification code of the deleted entity.
- Deleted: the date and time of deleting the entity from the archive server.
- Description: a required description of the deleted entity. If an entity had no description before deletion, the delete action requires the input of a description.

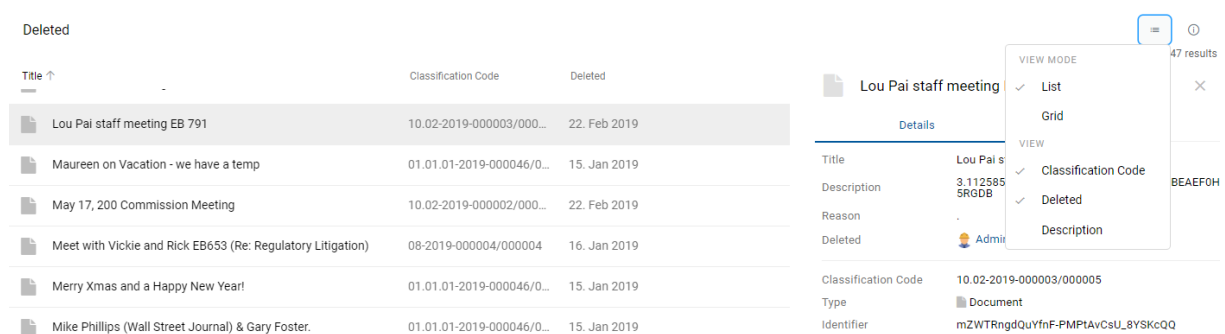



Image 362: Display of the Deleted folder in the Administration system folder

Note: by selecting the  icon, the user defines which columns will be displayed in the review of deleted entities.

The user can check or uncheck Classification code, Deleted and Description. The Title of the draft is mandatory.

The title, description and classification code are the only attributes still preserved when an entity has been deleted. All other metadata of the entity is erased and replaced with the following attributes:

- Reason: the reason for deletion as it was input by the user when removing the entity.
- Deleted: the name of the user who deleted the entity and the date and time of entity deletion.
- Identifier: unique identifier of the deleted entity.

4.4 System attributes

System attributes are predefined. On the IMiS®/ARCHive Server they are specified by the attribute scheme and have prescribed properties.

Attributes can be:

- Publicly accessible: The attribute is accessible to all users no matter what access rights and roles they have.
- Required: The attribute value has to be input before the entity can be saved.
- Read-only: Attributes can be read but not edited.

Attributes can have multiple values, pick list values or any combination of possible properties.

Attribute values can also be inherited.

The table below describes the possible attribute properties.

Name of attribute property	Description
Public	Attribute is publicly accessible to all users.
Required	Attribute value is mandatory.
Unique	Attribute value must be unique.
ReadOnly	Attribute value cannot be changed.
MultiValue	Attribute has multiple values.
PickList	Attribute must have one of the values from the pick list.
Searchable	Attribute is searchable.
Inherited	Attribute values are inherited from the parent entity.
AppendOnly	Attribute values may only be appended.
IncludInAIP	Attribute values are part of the archive information package.
Full text indexed	Attribute values are indexed.

Table 14: Description of possible attribute properties

In addition to limitations that specify attribute properties, certain other system limitations also apply. For example, some attributes are only available for specific types of entities, and some only for entities in a specific location in the classification scheme, or after a specific action has been executed (e.g. transfer)

All the system attributes of the IMiS®/ARChive Server are described below.

4.4.1 General system attributes

The general system attributes of an entity consist of various attributes such as Title, Description and Classification code. They contain mandatory as well as optional attributes.

Most attributes are available for all entities. The exceptions are Status, Opened date and Closed date, which are present for classes, folders, and those documents that are located directly under a class. The table below lists and describes all the general system attributes.

Name	Description
Classification code	<p>Contains the entity's classification code within the classification scheme. The classification code is generated automatically on the archive server.</p> <p><i>Example: The classification code 01-2019-00004/00001 represents document 00001, located inside folder 2019-00004, located inside class 01. The classification code is a publicly accessible type of metadata.</i></p>
Title	Saves/contains the title of the entity. The title is a required, public metadata that enables search.
Description	Saves/contains a short description of the entity. The description is a public metadata.
Status	<p>Saves/contains the status of the entity. The status is a required metadata for all entities that are either classes, folders, or documents directly under classes. It is a public metadata that enables search.</p> <p>The possible values are:</p> <ul style="list-style-type: none"> • Opened: the entity can be edited by a user with the appropriate effective access rights (the right to write) • Closed: the entity cannot be edited.
Opened date	Contains the date and time the status of the entity was changed to Opened. The opened date is public metadata, is read-only and enables search.
Closed date	Contains the date and time the status of the entity was changed to Closed. The closed date is public metadata, is read-only and enables search.

Significance	Saves/contains the significance rating of the entity. Significance is a required metadata for folders and documents. It is public metadata that enables search. The possible values are: <ul style="list-style-type: none"> • Vital: entity is vital. • Permanent: entity is permanent. • Retain: entity should be retained. • Delete: entity is queued for deletion.
Security class	Saves/contains the security class of the entity. The security class is optional metadata for all new entities. Once it is set, it cannot be modified without stating a reason for change. The security class is a public metadata that enables inheriting and enables search. The possible predefined values are: <ul style="list-style-type: none"> • Unclassified: entity is freely accessible. • Restricted: entity is of an internal nature. Can only be accessed by users with clearance level Restricted or higher. • Confidential: entity is confidential. Can only be accessed by users with clearance level Confidential or higher. • Secret: entity is secret. Can only be accessed by users with clearance level Secret or higher. • Top Secret: entity is top secret. Can only be accessed by users with clearance level Top Secret.
Creator	Contains the creator of the entity (name of user who created it). The value is set when an entity is created on the IMiS®/ARChive Server and cannot be changed. The creator is a public metadata, is read-only and enables search.
Owner	Saves/contains the owner of the entity. The value of the attribute is selected from among the currently registered users of the archive server. The owner is a public metadata that enables search.
Keywords	Saves/contains keywords related to the entity. This attribute can have multiple values and is a public metadata that enables search.
External Ids	Saves/contains external identifiers of the entity. This attribute can have multiple unique values and is a public metadata that enables search. <i>Warning: When entering values, keywords should be separated using the Enter key or the semicolon character (;).</i>
Save log	Contains a report on the verification of the electronic signature for digitally signed content. This attribute can have multiple, added values. It is a public metadata that enables search
Timestamped	Contains the information on when the entity was last timestamped.

Table 15: Description of general system attributes

4.4.2 Security class change attributes

Security class change attributes are created by the IMiS®/ARChive Server when an entity's security class is changed. They store the agent of the change, the reason and date of the change, and the value before and after the security class change.

Name	Description
Agent	Contains the agent (user who changed the entity's security class).
Reason	Contains the reason for the security class change.
Modified date	Contains the date and time the security class was changed.
Before change	Contains the security class value prior to the change.
After change	Contains the security class value after the change.

Table 16: Description of security class change attributes

4.4.3 Moved entity attributes

Moved entity attributes are created by the server when an entity is moved. They store the agent of the move, the reason and the date.

Name	Description
Agent	Contains the agent of the move.
Reason	Contains the reason for the move.
Moved date	Contains the date and time the entity was moved.

Table 17: Description of moved entity attributes

4.4.4 Deleted entity attributes

Deleted entity attributes are created by the server when an entity is deleted. They store the agent of deletion, the classification code, the reason for the deletion and its date.

Name	Description
Agent	Contains the agent of the delete action.
Classification code	Contains the classification code of the deleted entity.
Reason	Contains the reason for the entity's deletion.
Deleted date	Contains the date and time the entity was deleted.

Table 18: Description of deleted entity attributes

4.4.5 Transferred entity attributes

Transferred entity attributes are created by the server when an entity is imported.

They store the system identifier, the classification code of the transferred entity, the audit log and the date of import.

Name	Description
System Id	Contains the unique system identifier of the transferred entity.
Classification code	Contains the classification code of the transferred entity.
Audit log	Contains the audit log of the transferred entity.
Imported date	Contains the date and time the entity was transferred.

Table 19: Description of moved entity attributes

4.4.6 Email attributes

Email attributes are only available for documents that have been created using an email template. Email attributes store information about the email such as the sender, recipients, and sent date.

Name	Description
Message Id	Contains the automatically generated message identifier.
From	Contains the address of the sender. This metadata is mandatory.
To	Contains the addresses of the email's recipients.
CC	Contains the addresses of the email's CC recipients.
BCC	Contains the addresses of the email's hidden recipients.
Subject	Contains the subject of the email message.
Priority	Contains the email priority status.
Signed	Contains a value that registers if the email was electronically signed.
Date	Contains the date and time the email was sent. This metadata is mandatory.

Table 20: Description of email attributes

4.4.7 Physical content attributes

Physical content attributes are only available for documents. The existence of physical content is specified by the unique physical content identifier. The physical content has a home location, which changes when it is checked out. The change of location is saved in the Status attribute.

Name	Description
Identifier	Contains the unique identifier of the physical content.
Description	Contains a short description of the physical content.
Status	Contains the current status of the physical content. Possible values are: <ul style="list-style-type: none"> - CheckedIn: the physical content is stored at its home location. - CheckedOut: the physical content has been sent to another location.
Status change date	Contains the date and time of the physical content's last status change.
Home location	Contains the home location of the physical content.
Current location	Contains the current location of the physical content.
Custodian	Contains the name of the physical content's custodian.
Return date	Contains the expected return date of checked out content.

Table 21: Description of physical content attributes

4.4.8 Review process attributes

Review process attributes are available only during review processes.

Name	Description
Members	Users who perform review process.
Action	By selecting one of the valid values, you influence the review process. Valid values: <ul style="list-style-type: none"> • Reviewing: the value represents the action of reviewing entities in the review process and does not influence the server. • Complete: the value represents the action of completing the review process on the server. • Discard: the value represents the action of canceling the review process on the server.
Comments	Optional attribute which is used for entering various comments, explanations and other information that is in any way connected with the review process.
Message	Short error description entered by IMiS®/ARChive Server. In the event of an error during the preparation or implementation phase of the review process. Also recorded in the attribute is the successful completion of the review process.

Name	Description
State	<p>This value is set by IMiS®/ARChive Server during the review process.</p> <p>Valid values:</p> <ul style="list-style-type: none"> • Unknown: this value represents an invalid state of the review process. • Created: this value is set by the server when the user creates a new review. • Preparing: this value is set by the server during the content creation phase for the review process. • InReview: this value is set by the server after successfully creating the entities for the review process. • Completing: this value is set by the server when beginning of the review process. • Completed: this value is set by the server after successfully implementing the review process. • Discarded: this value is set by the server after successfully canceling the review process. • Failed: this value is set by the server if an irreparable error occurred during implementation or cancellation.
Scope	<p>Represents the classification code of the entity under which the preparation phase of the review process will be implemented. If this value is not present, the preparation is implemented on the entire archive.</p>
Query	<p>This value represents the query which will/has captured entities for the review processes. This value is set if the Ad hoc function was selected for creating the process.</p>

Table 22: Description of review process attributes

4.4.9 Entity attributes in the decision-making process

Decision-making entity attributes are available only to the entity undergoing the process.

Name	Description
Classification code	Contains the entity classification code in the classification scheme.
Title	Title of the selected entity.
Action	Contains the action which will be implemented over the selected entity during the execution process. This value is copied from the effective retention policy.
Reason	Contains the reasons for the action to be implemented over the entities. This value is copied from the effective retention policy.
Comment	Contains a random comment which is entered during the transfer process.
Transferred	This attribute value states whether the entity transfer was successful or not. Valid values: "true" or "false".
Transfer id	Contains a value that represents a reference to the transferred entity.

Table 23: Description of entity attributes in the decision-making process

4.5 Authenticity

The IMiS®/wClient ensures the authenticity of stored electronic records for the lifelong duration of storage.

4.5.1 Digital certificate

The digital certificate and the private key are issued by a trusted Certificate Authority (CA) that manages the certificates. The certificate contains information that uniquely identifies the person who owns it. In addition to the private key disclosed only to the holder, it also contains a certified copy of the public key, which is used by third parties to verify the authenticity of content electronically signed using the certificate.

The public key and electronic signature authenticate the identity of the private key's holder.

Qualified digital certificates are used for:

- Secure internet communication using the SSL (Secure Sockets Layer) and TLS (Transport Layer Security) protocols.
- Secure email traffic using the S/MIME (Secure Multipurpose Internet Mail Extensions) protocol.
- Encryption and decryption of data in electronic form.
- Digital signing of data in electronic form, and the verification of the key holder's identity.
- Services or applications that require the use of qualified digital certificates.
- Safe deletion of data in electronic form.

4.5.1.1 Checking the validity of the digital certificate

Each time it saves an electronically signed content in the PDF/A, TIFF or XML formats or an email message in the EML format, the IMiS®/ARChive Server automatically checks the validity of the digital certificate using the Certificate Revocation List (CRL) of the issuing authority.

During the validity checking procedure, the IMiS®/ARChive Server sends the serial number of the certificate to the trusted authority's digital certificate server. The server, which frequently updates certificate revocation lists, then sends electronically signed information about the certificate's status to the user.

4.5.1.2 Revocation of the digital certificate

A trusted certificate authority can revoke their certificate(s), making them invalid.

The authority's digital certificate server contains lists of active and revoked certificates.

The Certificate Revocation List (CRL), based on the X.509 standard, shows a list of certificates (ID code, date and time of revocation) that were revoked by the authority before having expired.

4.5.2 Electronic signature

Electronic signatures are based on asymmetrical cryptography. Users signs content with their own private key. The private key is only accessible to a particular user and is saved in their digital certificate, protected by a password. The password is set by the user upon installation and can also be changed later.

The public key is accessible to anyone, and the trusted certificate authority (CA) guarantees it belongs to a particular organization. Anyone can verify the organization's digital signature by processing it with the corresponding public key.

The electronic signature proves the authenticity and integrity of a signed document. It enables recognition of the signer, confirms the content has not been modified, and provides a link between the signer and the signed content.

Any change to the content of a document or its metadata will make the signature invalid.

4.5.2.1 Process of electronic signing

Using the electronic signature, the user integrates data from the digital certificate with the content of the document. On the basis of a hash algorithm, the complete content of the document is transformed into a unique string of data (digital fingerprint), which is encrypted with the user's private key. The private key is stored in the digital certificate or in a separate private key storage location, depending on the settings.

The digital fingerprint is integrated with the content of the document along with information about the digital certificate and the corresponding public key, but not the private key.

Note: The IMiS®/wClient does not (yet) enable the electronic signing of TIFF and PDF/A-type files.

4.5.2.2 Verifying the validity of the electronic signature

The recipient of a signed document uses the signer's public key to verify the validity of the document. The public key is found in the signer's digital certificate, which is also stored in the signed document. If the signature is valid, this confirms the document was saved by the signer and was not modified since then. The validation procedure also checks the validity of the signer's digital certificate.

The IMiS®/wClient enables the verification of electronic signatures during document capture or when documents are being saved. The entire procedure is performed on the IMiS®/ARChive Server for the document formats PDF/A, TIFF, XML, and for EML email messages.

The server then communicates the verification results to the client.

The verification message is displayed as a popup window in the bottom part of UI.

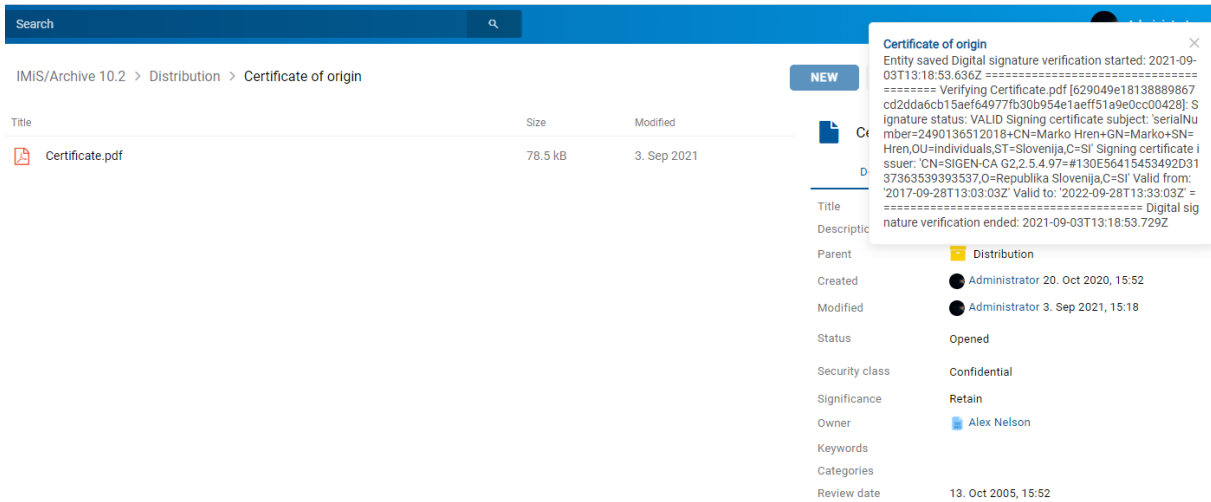


Image 363: Popup window containing the result of the document's electronic signature verification.

The popup window automatically closes after a few seconds. The signature is automatically verified when a document is being archived to the server. The archive server also saves documents with invalid electronic signatures.

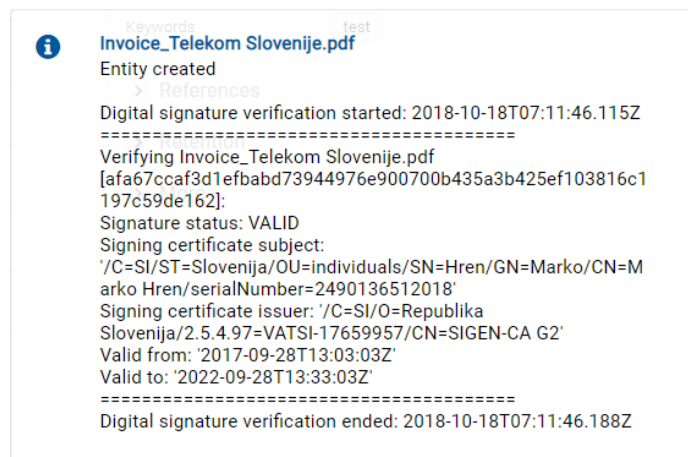


Image 364: Example of a report for a valid electronic signature and valid digital certificate

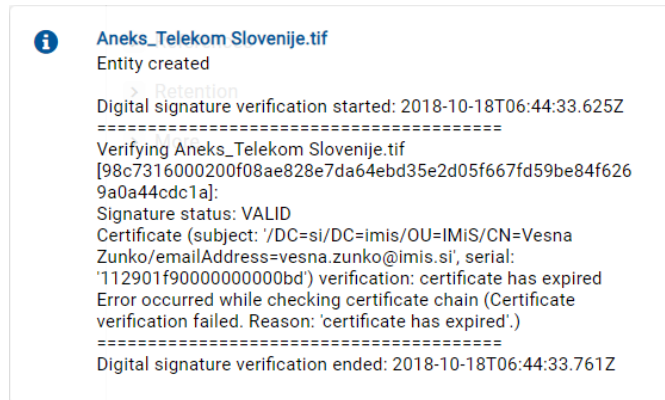


Image 365: Example of a valid electronic signature and an expired digital certificate

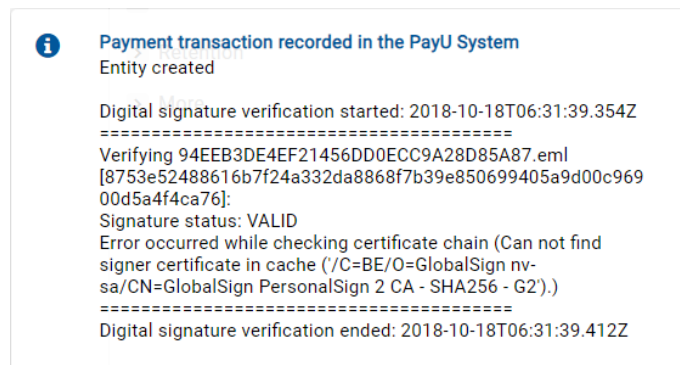


Image 366: Example of a valid electronic signature for which the certification authority could not be verified.

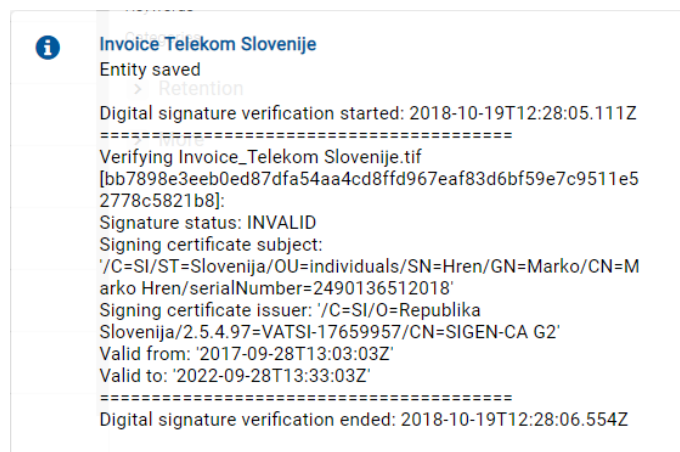


Image 367: Example of an invalid electronic signature due to a modification of the document after signing.

4.6 Review process

Each entity in the classification scheme has its own life span. Each class, folder or document classified directly under a class must have at least one retention period set, which specifies the time frame for the retention of an individual entity in the archive.

In addition to the time frame, the retention policy also contains the default action which will be implemented in the review process. This action can be changed by the team members during a controlled and planned process of implementation the transfer, disposition or permanent retention of the content.

IMiS®/wClient enables the user to:

- Prepare the review process.
- Review and select entities during the decision-making process.
- Implement the review process.
- Transfer selected entities.
- Review the content of documents.
- Review the selected retention periods.
- Transfer save log.

All activities in the review process are implemented in the “Reviews” folder, classified under the Administration system folder.

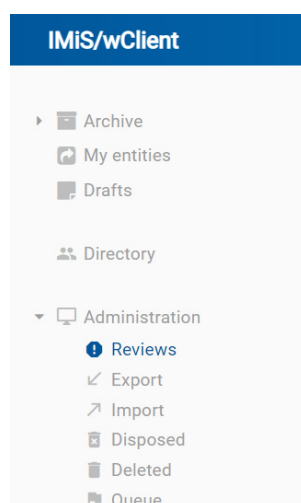


Image 368: The Reviews folder in the left view

The review process can be implemented by users with the Read access rights, which grants them access to the Reviews folder. Creating reviews is enabled for users with the Create entities right.

4.6.1 Preparation phase

In the left view, the user selects the Administration system folder in which the Reviews folder is located. By selecting the folder, the central view shows the already prepared Reviews, if any.

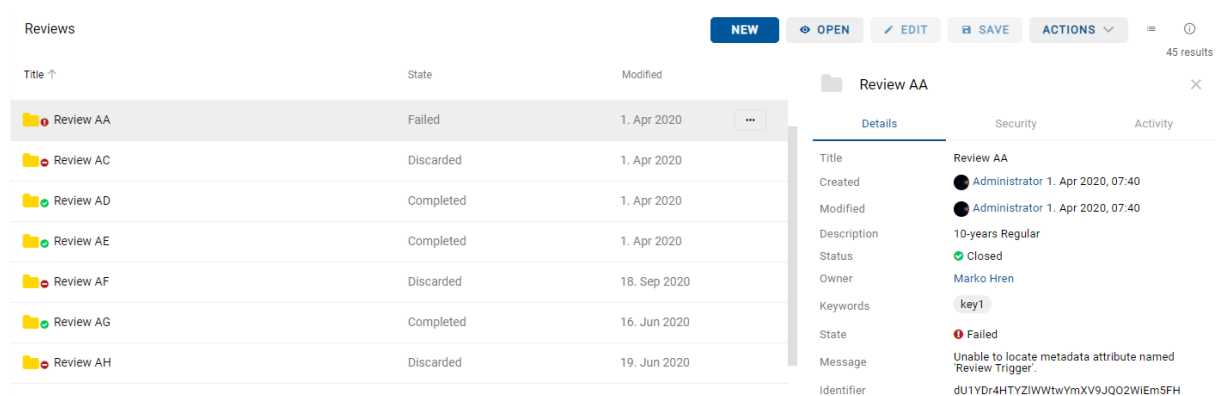


Image 369: A list of reviews in the review process

By selecting the New command, a pop-up menu appears, where the user selects the:

- Type
- Retention policy
- Scope
- Reason.

4.6.1.1 Review types

The user can choose the following two modes for creating a review of selected entities:

- Regular: Preparation of review based on selected retention periods.
- Ad hoc: Preparation of review based on the query provided. It is used when transferring entities to a third archive.



The screenshot shows a 'Create review' dialog box. The 'Type' dropdown menu is open, showing two options: 'Review regular' (which is highlighted in blue) and 'Review ad hoc'. Below the dropdown, there are two radio button options for 'Retention policy': '10 years' and '5 years'.

Image 370: Selecting the review type

4.6.1.1.1 Regular review

When selecting the default value Regular review, the user also selects the:

- Retention policy: a list of retention periods for the review process.

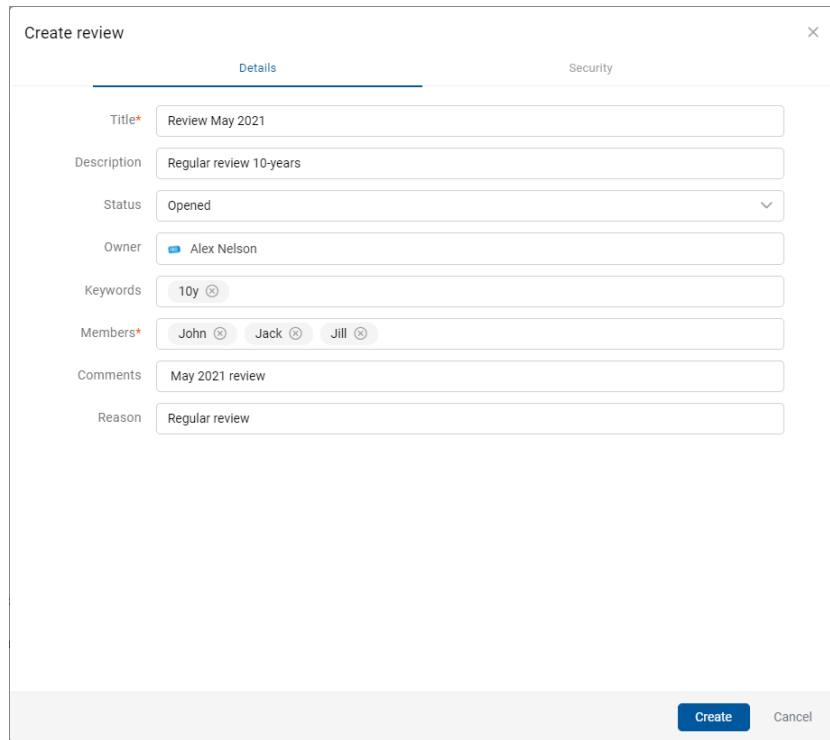


The screenshot shows the 'Create review' dialog box with the following fields filled out: 'Type' is set to 'Review regular'; 'Retention policy' has '10-years' selected with a blue checkmark; 'Scope' is a text input field containing 'Search for entity...'; and 'Reason' is a text input field containing 'Regular review May 2021'.

Image 371: Creating a new Regular review in the preparation phase

- Scope: selecting the entire archive or entity under which the review will be implemented.
- Reason: the reason for creating the review.

After confirmation with the Next command, the user is shown the attributes of a new review in the review process in the Details tab. The user appropriately supplements the review details.



The screenshot shows a 'Create review' dialog box with two tabs: 'Details' (active) and 'Security'. The 'Details' tab contains the following fields:

- Title*: Review May 2021
- Description: Regular review 10-years
- Status: Opened (dropdown menu)
- Owner: Alex Nelson (with a user icon)
- Keywords: 10y (with a close icon)
- Members*: John (with a close icon), Jack (with a close icon), Jill (with a close icon)
- Comments: May 2021 review
- Reason: Regular review

At the bottom right of the dialog, there are two buttons: 'Create' (highlighted in blue) and 'Cancel'.

Image 372: Display of Regular review attributes in the review process

In the Security tab the user with the appropriate rights defines the access permissions for users, groups and attributes of the directory entity type. For more information on defining access permissions see chapter [Entity access](#).

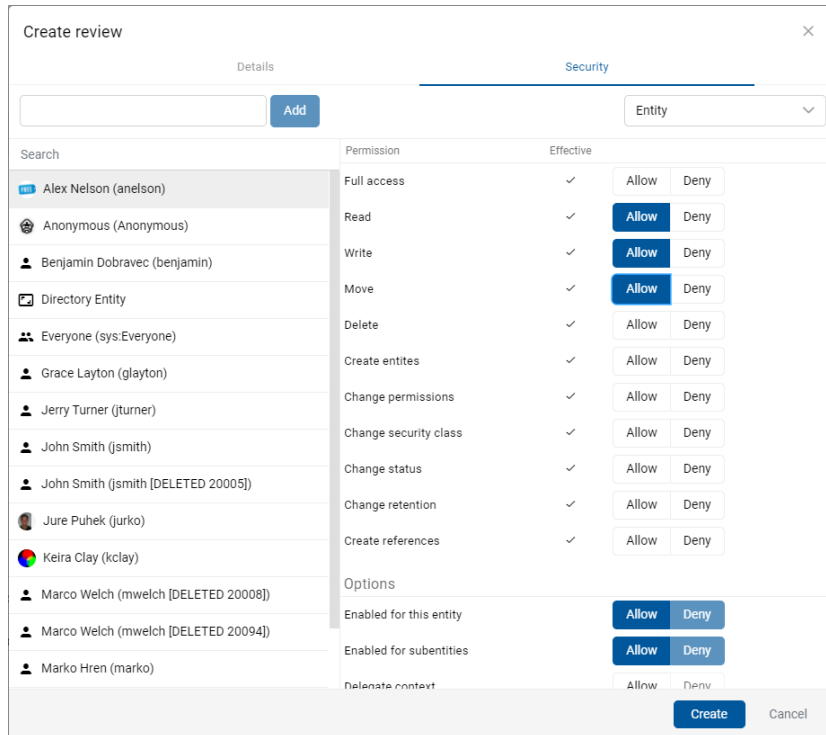


Image 373: Access permissions for Regular review in the Security tab

After entering the metadata, the user saves the review to IMiS®/ARCHive Server by selecting the action Create. While preparing the entities for review, the review status changes to "Preparing".

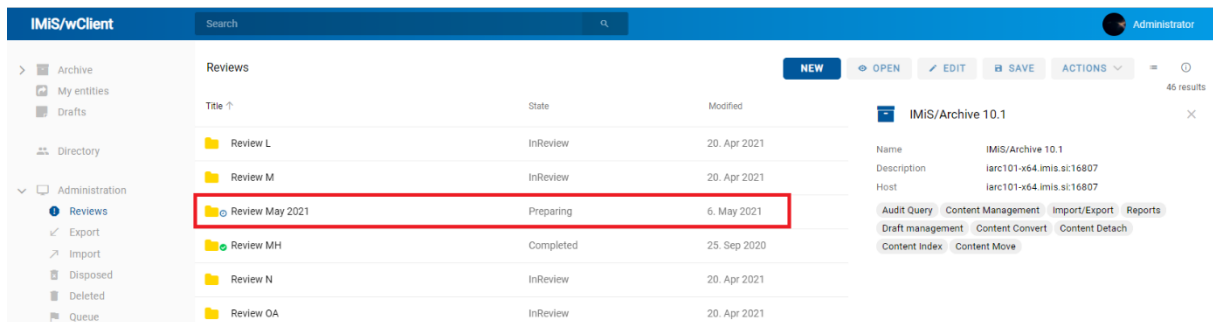



Image 374: Display of the saved Regular review

The Details tab contains the following information on review:

- Title: the title of the review.
- Created: the user that created the review and the date and time of creating the review.
- Modified: the user that last edited the review and the date and time of the last change to the review.
- Description: a short description of the review.
- Status: the status of the review.
- Owner: a directory (user or group) entity that is responsible for the selected review.
- Keywords: keywords related to the review. Attribute can have multiple values.
- State: the state of the review.
- Message: a message to the user regarding the review process.
- Authenticity evidence: obtaining authenticity evidence of the selected review. In case authenticity evidence for the selected review already exists on the archive, the user can obtain authenticity evidence by selecting the icon  in the Details tab in the right view. For more information see chapter [Acquiring the authenticity evidence](#).
- Identifier: the identifier of the review.

The entities imported by a user with the ImportExport role have to be compressed (.zip) and prepared in the prescribed XML format.

4.6.1.1.2 Ad-hoc review

After selecting the Ad hoc command, the following fields for entering the value of the attribute Expression appears to the user:

- Expression: query based on which a list of selected entities will be created.
- Scope: selecting the entire archive or entity under which the custom review will be implemented.
- Reason: the reason for creating the custom review.

Image 375: Entering a search expression in the Ad hoc review

After confirmation by clicking on the Next button, a dialog window shows the tabs of a new review in the ad-hoc review process.

The Attributes tab contains the list of all process attributes which can be entered by the user. For more information on entering metadata see chapter [Entering entity metadata](#).

Image 376: Display of the attributes of the review process in the Ad hoc mode

By creation of the review, two attributes are mandatory: Title and Members performing the entity review.

As in a regular review, the user with the appropriate rights defines the access permissions for users, groups and attributes in the Security tab.

After entering the metadata, the user saves the review to IMiS®/ARChive Server by selecting the action Create.

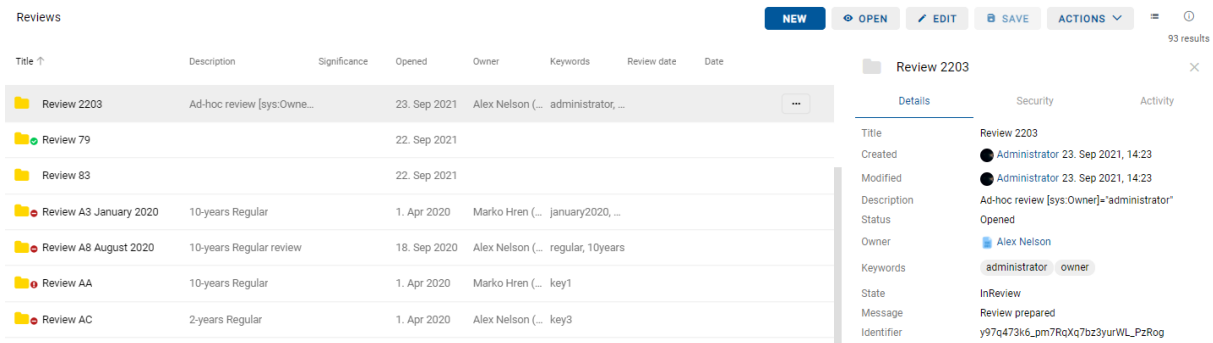


Image 377: Display of a saved ad-hoc review

This starts the transfer of all entered metadata to IMiS®/ARChive Server. After the review has been saved, it is queued for preparation.

Problems: The most common problem during saving is that the value of the mandatory attribute has not been entered.

Problems: The most common problem when creating a new review in the review process is that the user does not have the access right to create new reviews.

4.6.1.2 Canceling the review process

The review process can be discarded by team members at any time with the Discard command. They do that by selecting the Actions command in the command bar and the Discard action in the popup menu.

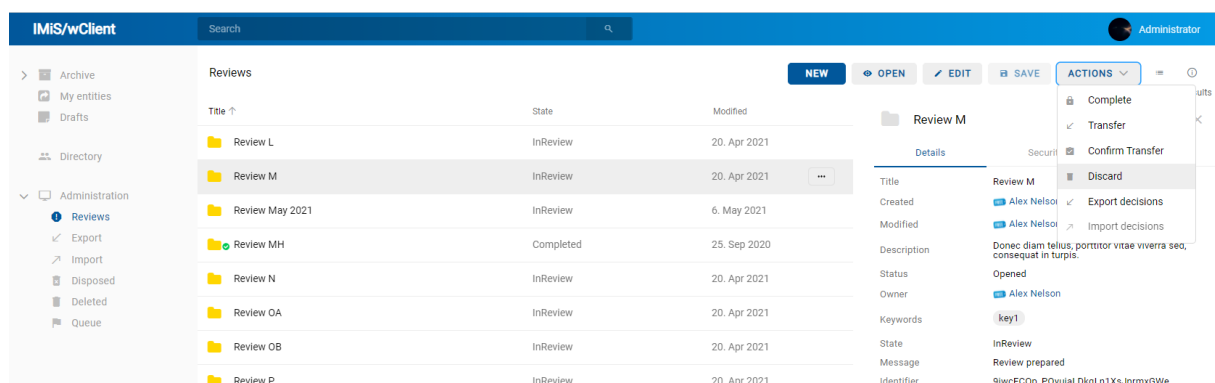


Image 378: Cancellation of the review process using the Discard command

After discarding the review process, the IMiS®/ARChive Server:

- Changes the value of the State attribute to Discarded.
- Changes the value of the Status attribute to Closed.
- It is entered into the Message attribute that the review process has been discarded by the user. In this case the entire review process must be recreated.

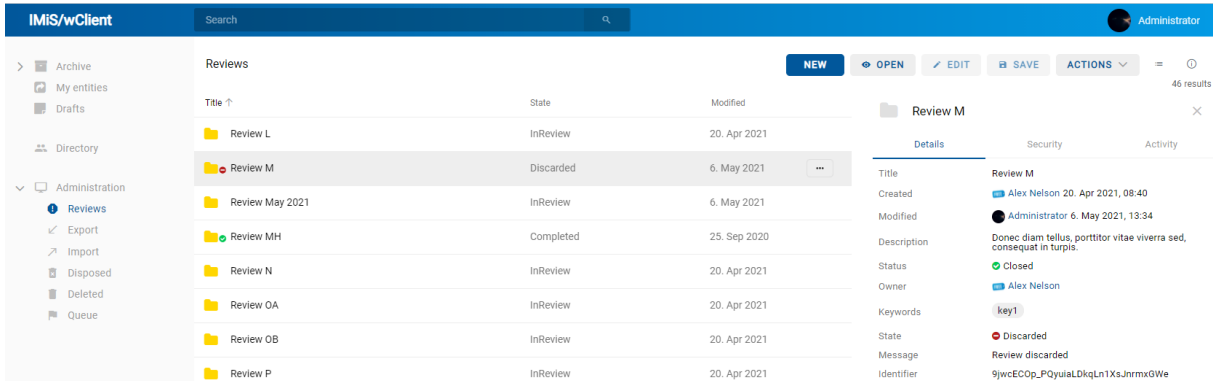


Image 379: A canceled decision-making phase

4.6.1.3 Entity preparation phase

The phase of preparing a list of entities begins when IMiS®/ARChive Server detects that entities are queued for review. The list only shows those entities which meet the condition of the selected retention periods. Other criteria are considered in the process.

For more information see chapter [Filtering process in the IMiS®/ARChive Server Manual](#).

While the review process is in the preparation phase, it cannot be modified.

During that time, its State attribute shows the Preparing value.

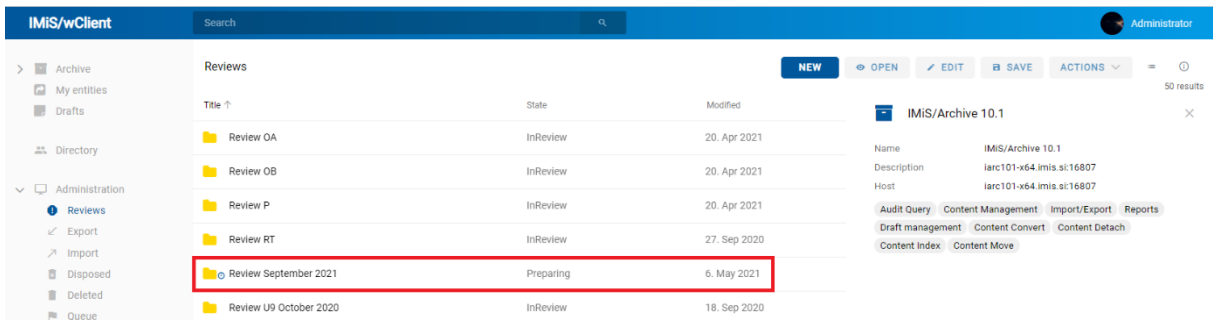


Image 380: Display of the review in the preparation phase in the Preparing state

Once IMiS®/ARChive Server finishes preparing a list of entities, the value of the State attribute changes to InReview. The preparation of a review is completed and awaits the decision-making phase.

The entity placed on the list remains on that list even if its retention period is modified after the list was prepared.

During the preparation phase of the review process an error can occur for various reasons. In the event of an error, the review process is automatically cancelled. Such a process does not contain entities on its list and cannot be prepared again. Such a list also cannot be edited.

The following attributes change their values:

- The value of the Status attribute changes to Closed.
- The value of the State attribute changes to Failed.
- The cause of the cancellation is recorded into the Message attribute.

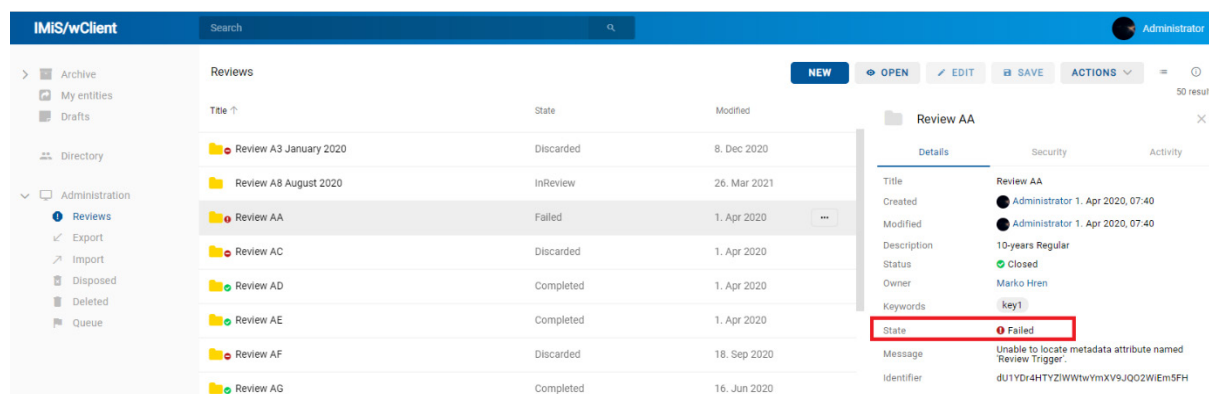


Image 381: Display of an error which occurred during the preparation phase of the review process

4.6.2 Decision-making phase

By selecting the folder, the central view shows all of the reviews created. By selecting the appropriate review, review pages are shown along with the associated documents, which are the object of the review process.

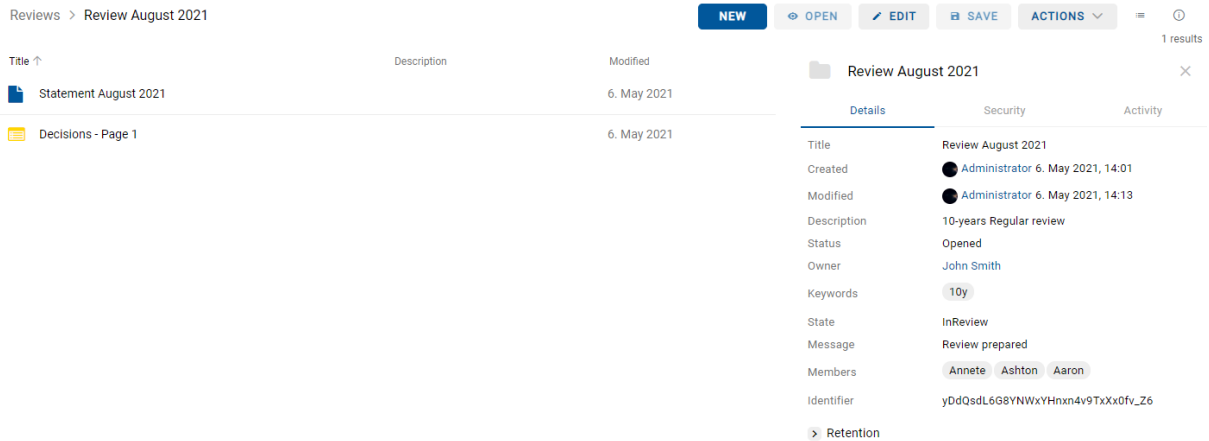


Image 382: Display of the review pages and documents

In the review the following data is visible for each page:

- Sequential title of the review page in the Title line.
- Short description of the review page in the Description line.
- Date of last page modification in the Modified line.

Each page contains the final number of entities. The default value is 2,000 entities.

By clicking on the selected page, the central view shows a list of selected entities.

A feature of this list is a display of the action which will be executed for each entity after the entire review process is completed.

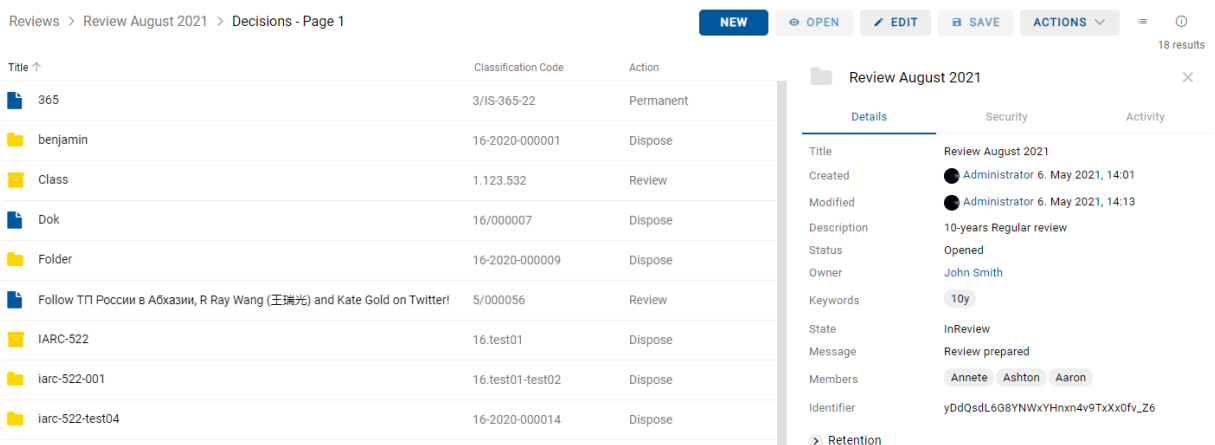



Image 383: A list of selected entities on a specific review page

By selecting the icon  in the right-hand command bar, the user can define which columns of the selected attributes will be shown on the list of selected entities in the central view. The user can add or remove: Classification code, Action and Reason. The column with "Entity titles" is always present.

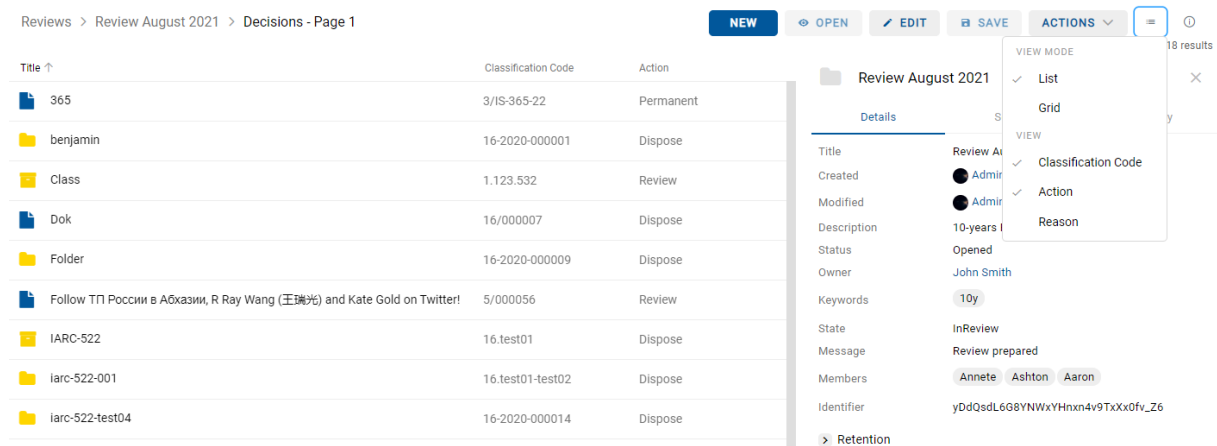


Image 384: Defining the columns of selected attributes in the popup menu

An entity on the list of an individual review page in the right view, has the following tabs:

- Details: a list of the metadata of the selected entity.
- Security: a review of the effective permissions of directory entities for the selected entity.
- Activity: audit log records for the selected entity.

By clicking on the Navigate to button in Details tab, the selected entity is shown in the classification scheme.

The user can return to the review by selecting the back arrow in the browser.

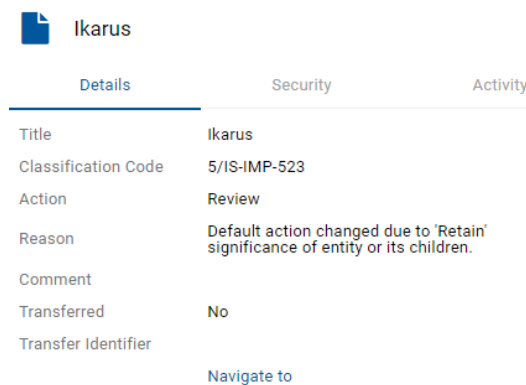


Image 385: Option of viewing an entity from the review

4.6.2.1 Modification of the attribute values in the review

If team members decide that the actions of certain entities must be modified in the review process, they can do so with the Edit command.

For more information on attributes see chapter Attributes in the review process.

In the right view, the user can modify the following attributes:

- Action
- Reason
- Comment
- Transferred
- Transfer identifier.

Meeting w/Rebecca McDonald...		
DETAILS	SECURITY	ACTIVITY
Title	Meeting w/Rebecca McDonald - EB2751	
Action	<input type="text" value="Review"/>	
Reason	<input type="text" value="Retention policy conflict. No default reason av"/>	
Comment	<input type="text"/>	
Transferred	<input type="checkbox"/>	
Transfer Identifier	<input type="text"/>	
Classification Code	C=01*C=01*C=02*F=2019-000021 Navigate to	

Image 386: Adding and modifying attribute values in editing mode

Action

The default value of the »Action« attribute is set by the retention policy in the server's configuration. In the event that the entity undergoing the transfer process has several retention policies which contradict one another, the default value of this attribute is InReview. Such an entity requires a decision from team members on the type of action.

If team members decide that the actions of certain entities must be modified, they can perform one of the following actions in the central or right view:

- **Dispose:** the entity will be disposed of after the process is completed.
- **Permanent:** the entity will never again be selected in the review process. It has been marked for permanent retention.
- **Review:** an action which does not modify the entity's life span. The entity can be selected in the next transfer process.
- **Transfer:** after confirming the transfer and successfully completing the transfer process, the entity will be disposed of.

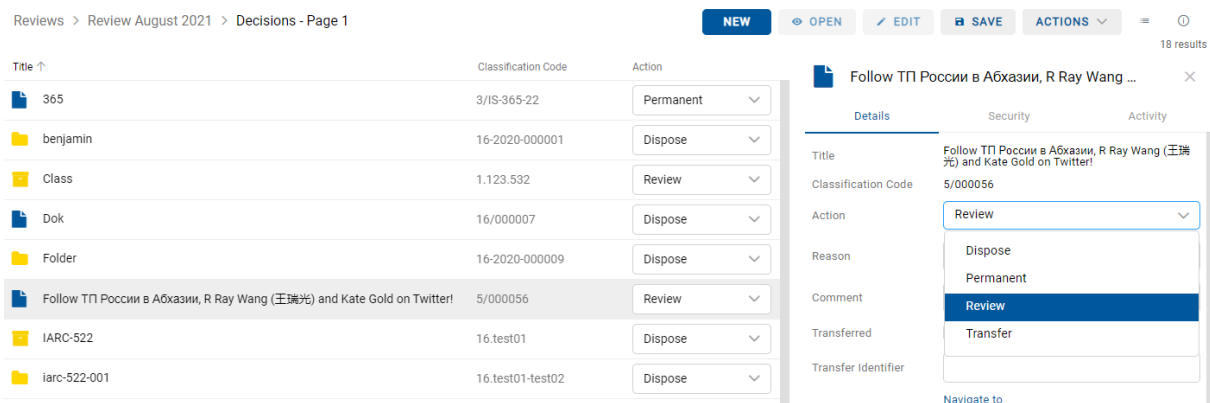


Image 387: Modifying the action of an entity in editing mode

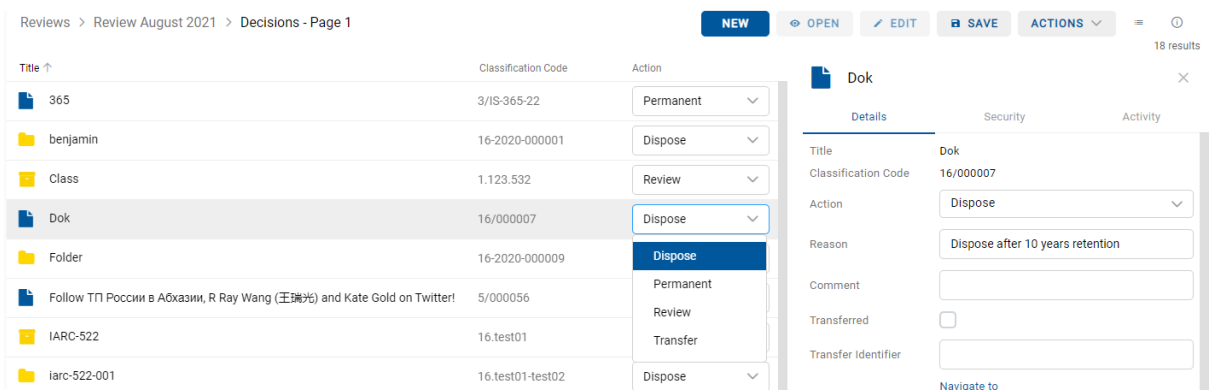


Image 388: Modifying the entity action in the central view

Note: The default value of the "Action" attribute can also be modified using the keyboard (Tab → next; Tab + Shift → previous; arrow keys for selecting the value in the popup menu).

Reason

Every time the »Action« attribute is modified it is recommended that team members also record the reason for the modification in the Reason attribute.

Comment

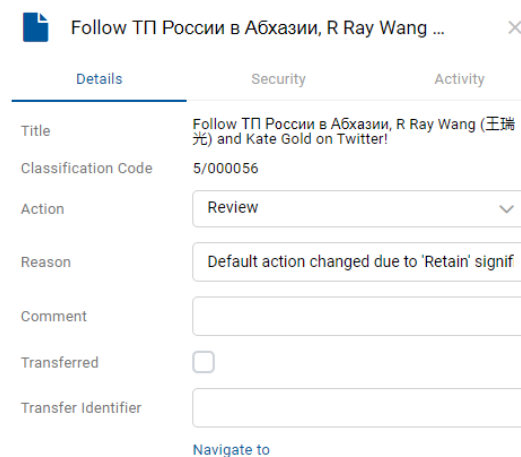
In the decision-making phase the team members can comment on their decisions.

Transferred

Team members must specify for each entity on the list whether it has been transferred. They do so by ticking the box.

Transfer identifier

If they wish, the team members can also enter a reference to the transferred entity by entering the value of the Transfer identifier attribute.



Details	Security	Activity
Title	Follow ТП России в Абхазии, R Ray Wang (王瑞光) and Kate Gold on Twitter!	
Classification Code	5/000056	
Action	Review	
Reason	Default action changed due to 'Retain' signif	
Comment		
Transferred	<input type="checkbox"/>	
Transfer Identifier		

Navigate to

Image 389: Modifying attribute values in the review

After completion, the team members select the Finish command in the top command bar and then by clicking on the Save button save all confirmations to IMiS®/ARChive Server.

After completing the review of entities on the list, they can apply all the modifications by clicking on the Save button or cancel them by returning to the list of reviews.

Modifications of entities are not saved to IMiS®/ARChive Server until the user saves the review page. After saving, the list of reviews reappears. The team members can start working on the next review.

4.6.2.2 Canceling the decision-making process

The review process can be cancelled by team members selecting the Actions command and the Discard operation in the popup menu.

For more information on canceling the review process see chapter [Canceling the review process](#).

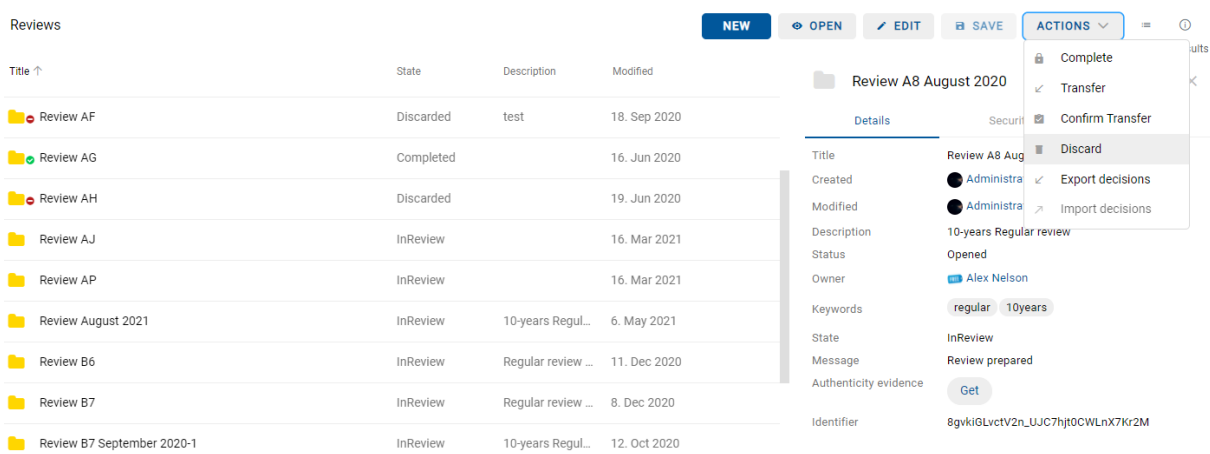


Image 390: Selecting the action "Export decisions" in the popup menu

4.6.2.3 Export decisions

Team members can review, edit and decide on decisions independently of the web client IMiS®/wClient. They can export decisions by selecting the "Actions" command in the command bar and the "Export decisions" action in the popup menu.

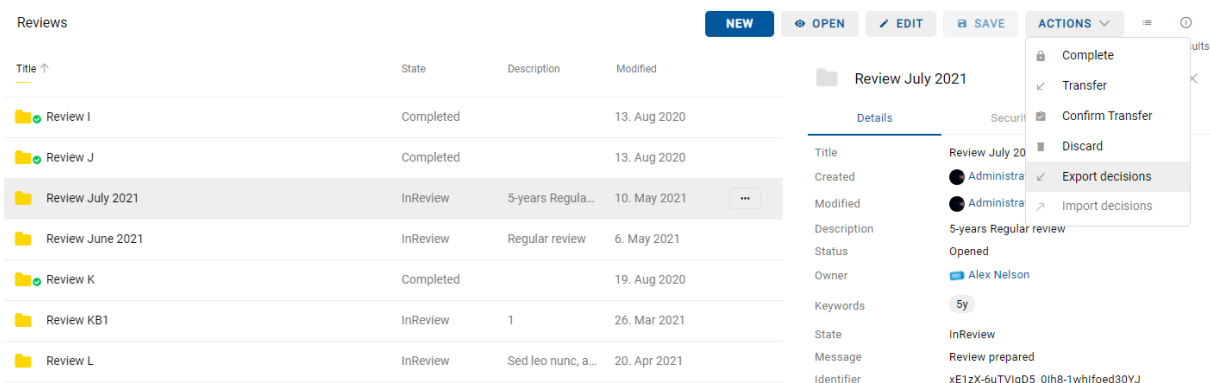


Image 391: Selecting the action "Export decisions" in the popup menu

In the dialog box they define the data on exporting decisions. They can choose between the file formats CSV and XML.

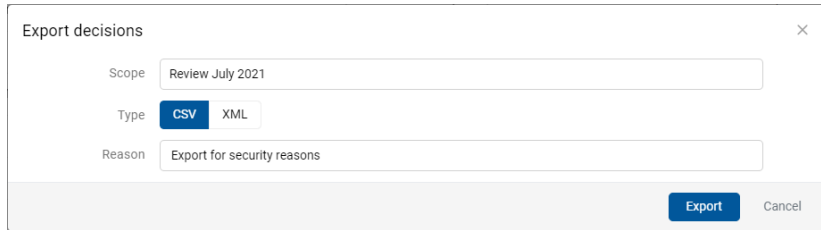


Image 392: Defining export data

After performing the action "Export", a notification is shown about exporting the file containing the decision to the relevant folder in the file system.

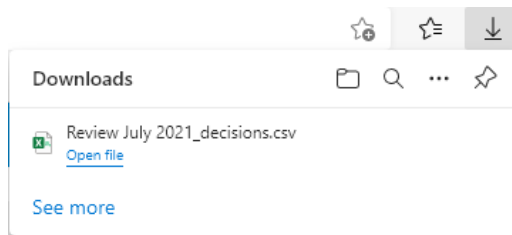


Image 393: Notification about exporting decisions



Image 394: File containing the decision in the file system

	A	B	C	D	E	F	G	H
1	ClassificationCode	Title	Actions	Action	Comment	Reason		
2	C=14*C=669	ClassificationCodeTest02	Dispose,Permanent,Review,Transfer	Review		Default action changed due to 'Retain' significance of entity or its children.	Transferred	TransferId
3	C=14*F=2020-000665	benjamin	Dispose,Permanent,Review,Transfer	Review		Default action changed due to 'Retain' significance of entity or its children.		
4	C=15*D=IS-527	Gibraltar	Dispose,Permanent,Review,Transfer	Transfer		Default action changed due to 'Retain' significance of entity or its children.	TRUE	7498596
5	C=3*D=IS-365-22	365	Permanent,Review	Permanent		Default action changed to 'Permanent' due to significance value of entity or its children.		
6	C=5*D=000056	Follow 0'0z 0 D'0NND, 0, E	Dispose,Permanent,Review,Transfer	Review		Default action changed due to 'Retain' significance of entity or its children.		
7	C=5*D=1	Patras	Dispose,Permanent,Review,Transfer	Review		Default action changed due to 'Retain' significance of entity or its children.		
8	C=5*D=IS-CONTENT-281	Versionable content	Dispose,Permanent,Review,Transfer	Transfer		Default action changed due to 'Retain' significance of entity or its children.	TRUE	7498596
9	C=8*D=000025	Conversion test Marko	Dispose,Permanent,Review,Transfer	Transfer	Manual transfer	Default action changed due to 'Retain' significance of entity or its children.	TRUE	7498596

Image 395: Before reviewing, editing and deciding independently of IMiS®/wClient

	A	B	C	D	E	F	G	H	I	J
1	ClassificationCode	Title	Actions	Action	Comment	Reason				
2	C=14*C=669	ClassificationCodeTest02	Dispose,Permanent,Review,Transfer	Review	Another Review needed	Default action remains.	Transferred	TransferId		
3	C=14*F=2020-000665	benjamin	Dispose,Permanent,Review,Transfer	Review	Another Review needed	Default action remains.				
4	C=15*D=IS-527	Gibraltar	Dispose,Permanent,Review,Transfer	Transfer	Transfer to another IS	Default action changed due to 'Transfer'.	TRUE	737475		
5	C=3*D=IS-365-22	365	Permanent,Review	Review	Another Review needed	Default action changed to 'Review'.				
6	C=5*D=000056	Follow 0'0z 0 D'0NND, 0, E	Dispose,Permanent,Review,Transfer	Review	Another Review needed	Default action remains.				
7	C=5*D=1	Patras	Dispose,Permanent,Review,Transfer	Review	Another Review needed	Default action remains.				
8	C=5*D=IS-CONTENT-281	Versionable content	Dispose,Permanent,Review,Transfer	Dispose	Obsolete	Default action changed to 'Dispose'.				
9	C=8*D=000025	Conversion test Marko	Dispose,Permanent,Review,Transfer	Dispose	Obsolete	Default action changed to 'Dispose'.				

Image 396: After reviewing, editing and deciding independently of IMiS®/wClient

4.6.2.4 Import decisions

After reviewing, editing and deciding, team members can import a decision to the web client IMiS®/wClient. By selecting the relevant review and decision in Edit mode, they select the "Actions" command in the command bar and the action "Import decisions" in the popup menu.

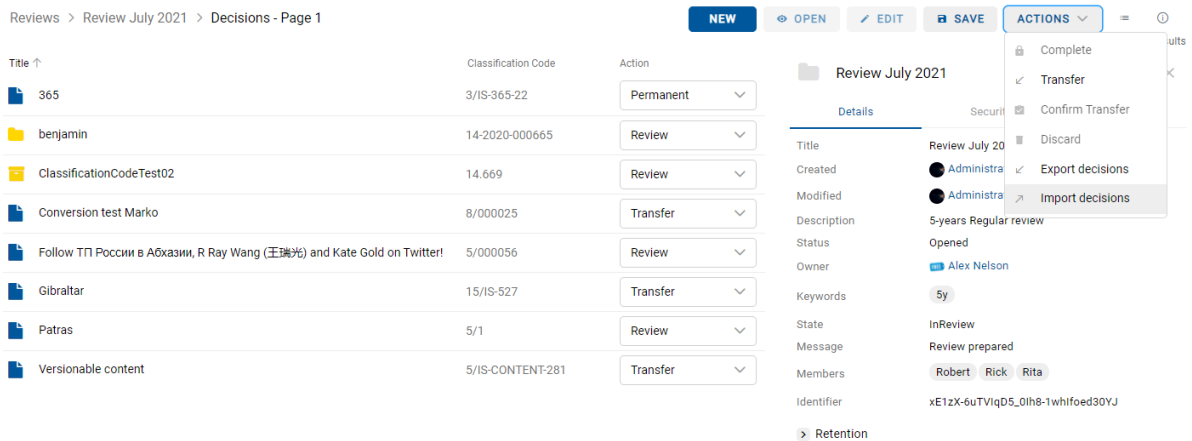


Image 397: Before selecting the action "Import decisions" in the popup menu

In the dialog box they select the file containing data on the decision.

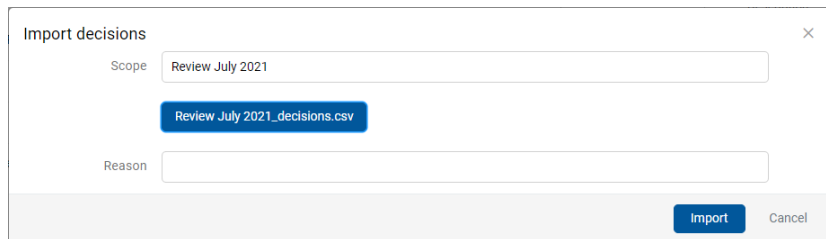


Image 398: Selecting a file for import

After performing the action "Import", a notification is shown about importing the file containing the decision to the relevant review.

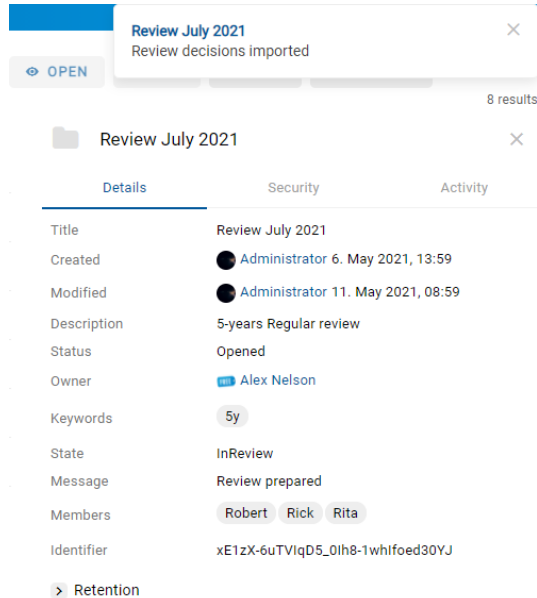


Image 399: Notification about importing decisions

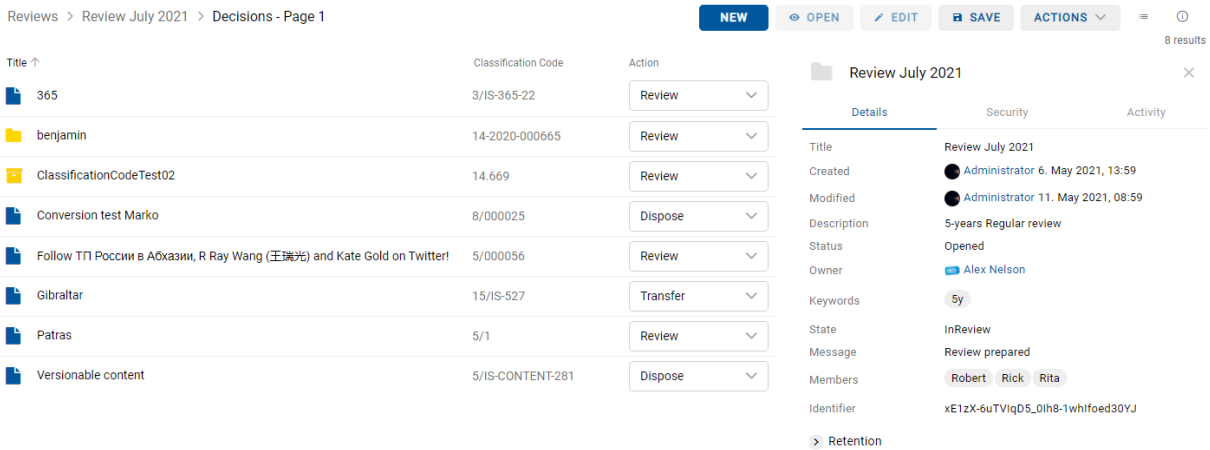


Image 400: After selecting the action "Import decisions" in the popup menu

After importing the decisions, team members save the review with the action "Save" in the command bar.

4.6.3 Implementation phase

The decision-making phase is followed by the implementation phase. Team members complete the review by selecting Actions command and the Complete operation in the popup menu.

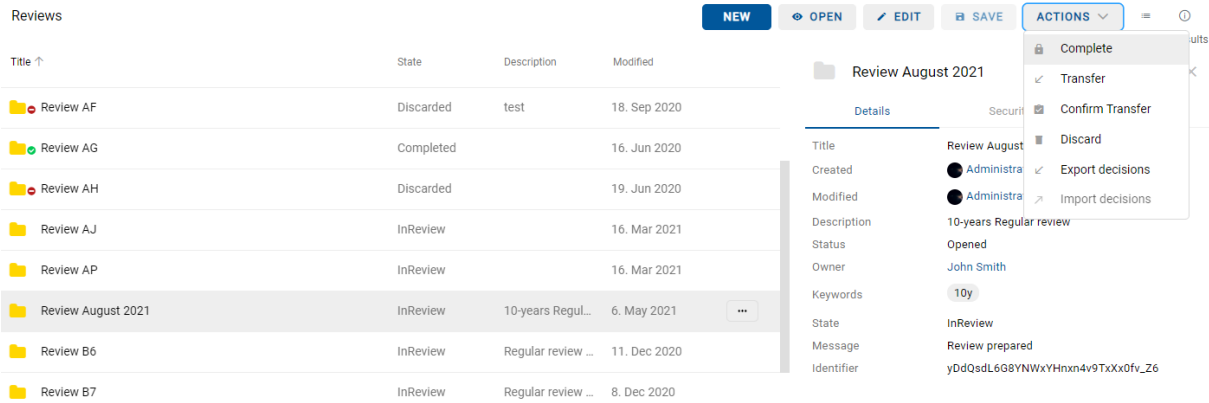


Image 401: Starting the process of completing the review

IMiS®/ARChive Server implements the review process of the disposition, transfer and permanent retention of entities.

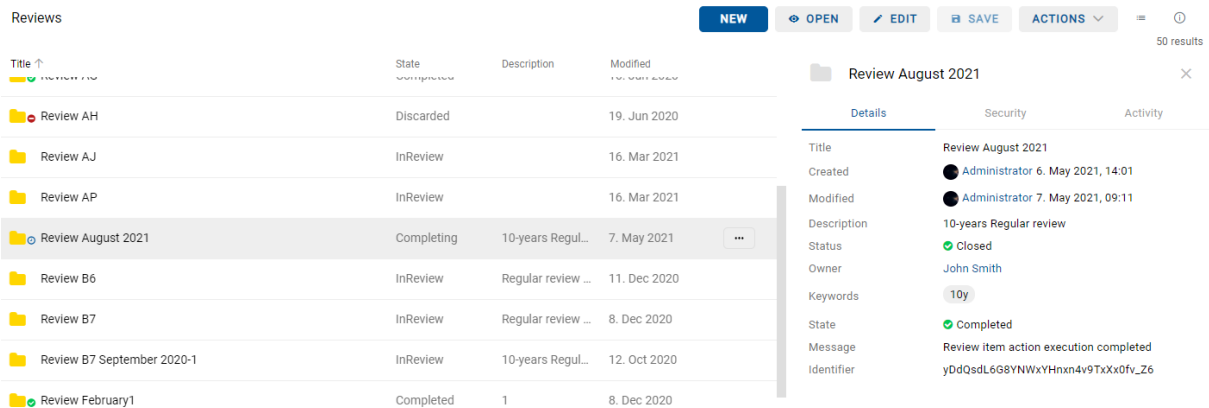


Image 402: During the process of completing the review

It automatically creates a review execute report on the implementation phase and files it among the review contents. For more information see chapter [Reviewing and classifying documents](#).

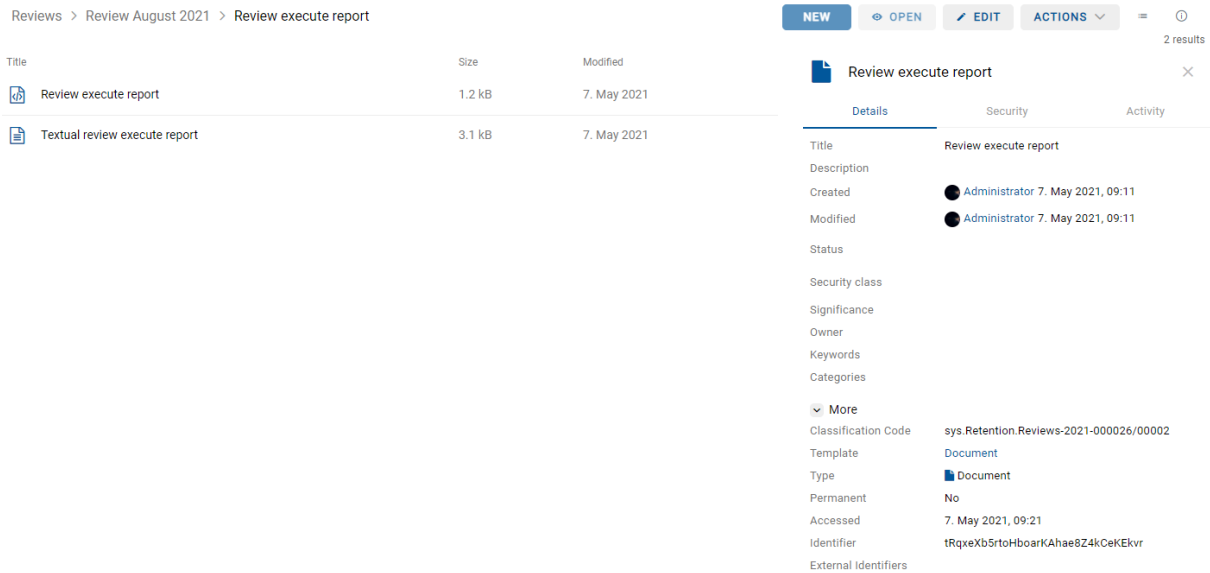


Image 403: Review execute report

This action completes the review process, which cannot be modified or implemented. The value of the Status attribute changes to Closed and the value of the Stat« attribute to Completed.

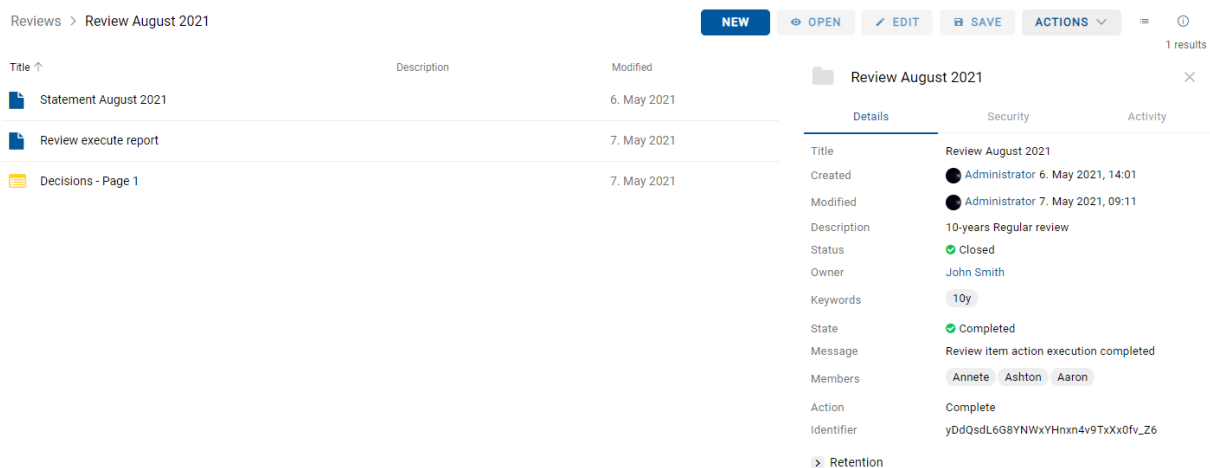


Image 404: Review completed

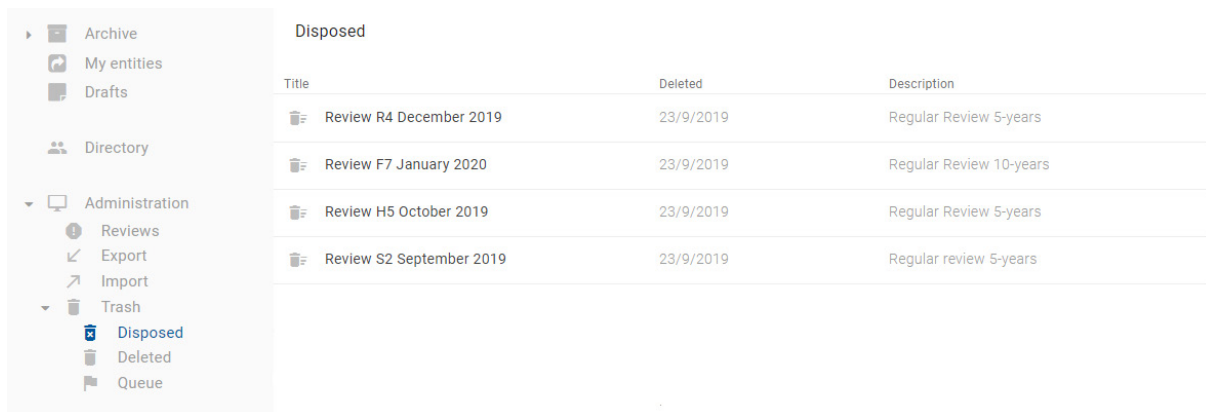
In the event of an error during the review process:

- An error description is recorded in the Message attribute.
- The value of the State attribute changes to Failed.
- The value of the Status attribute changes to Closed.

In this case the entire review process must be recreated.

4.6.4 Disposition

Each entity which was disposed of during the implementation phase of the review process is located in its raw form in the Disposed folder in the Trash folder, which is located in the Administration system folder.



Title	Deleted	Description
Review R4 December 2019	23/9/2019	Regular Review 5-years
Review F7 January 2020	23/9/2019	Regular Review 10-years
Review H5 October 2019	23/9/2019	Regular Review 5-years
Review S2 September 2019	23/9/2019	Regular review 5-years

Image 405: A list of reviews with disposed entities in the review process

By selecting the Disposed folder, the central view shows all of the review processes during which at least one entity was disposed of. By clicking on an individual review page, a list of disposed entities appears, where the following entity information are shown only:

- Title: the title of the disposed entity.
- Classification code: the classification code of the disposed entity.
- Deleted: the date and time of deleting the entity from the archive server.
- Description: a description of the disposed entity.

Title	Classification Co...	Deleted	Description
benjamin	16-2020-000001	7. May 2021	
ETZ_poročanje_tiskanje_2	16-2020-00000...	7. May 2021	
Dok	16/000007	7. May 2021	
Folder	16-2020-000009	7. May 2021	
IARC-522	16.test01	7. May 2021	IARC-522

IMIS/ARChive Server

Name: IMIS/ARChive Server
Description: iarc104.imis.si:16807
Host: iarc104.imis.si:16807

Audit Query Content Management Import/Export Reports
Draft management Content Convert Content Detach
Content Index Content Move

Image 406: A list of disposed entities on the review page

The Title, Classification code and Description of entity are the only attributes still preserved when an entity has been disposed of. All other entity metadata is erased and replaced with the following attributes:

- Reason: The reason for the disposition of the entity, which was entered by the user during the review process.
- Deleted: The date and time of the disposition of the entity.
- Identifier: Unique user identifier.

Title	Classification Co...	Deleted	Description
benjamin	16-2020-000001	7. May 2021	
ETZ_poročanje_tiskanje_2	16-2020-00000...	7. May 2021	
Dok	16/000007	7. May 2021	
Folder	16-2020-000009	7. May 2021	
IARC-522	16.test01	7. May 2021	IARC-522
IARC-522-001	16.test01-test02	7. May 2021	IARC-522-001

IARC-522

Details Activity

Title: IARC-522
Description: IARC-522
Reason: Dispose after 10 years retention
Disposed: Administrator 7. May 2021, 09:11

Classification Code: 16.test01
Type: Class
Identifier: rWgUCec1tkT3b3CnuaQIBB9VcfQYBGT_

Image 407: Metadata of the deleted entity in the right view

4.6.5 Transfer of entities

If the review process was also intended for the transfer of entities from IMiS®/ARChive Server, this action must be executed prior to completing the process.

The transfer action is executed with two separate processes:

- Exporting from IMiS®/ARChive Server to the file system.
- Confirmation of the transfer of entities to a third archive.

4.6.5.1 Exporting to a file system

The user executes the transfer of entities in the selected review selecting the Actions command and the Transfer operation in the popup menu.

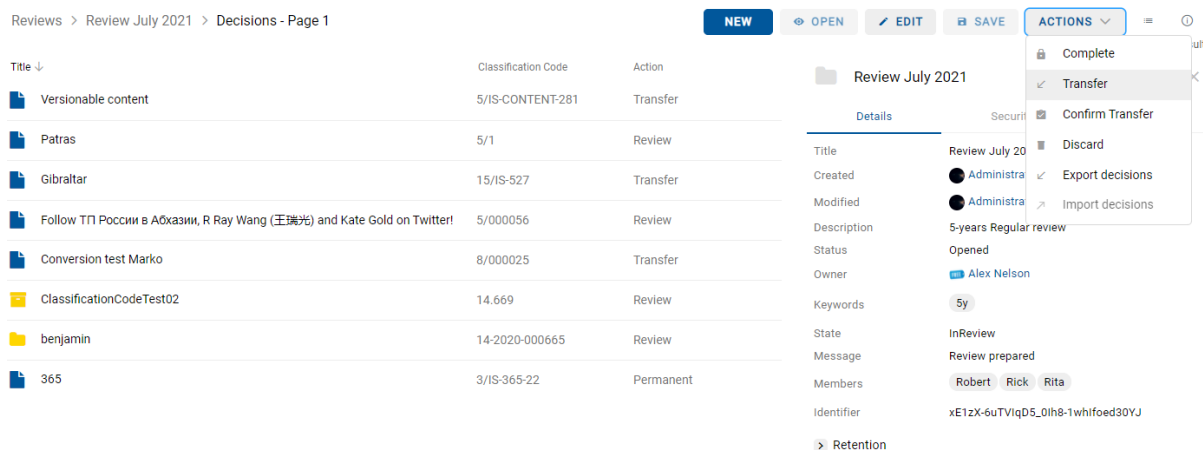


Image 408: Transfer of entities in the review process

After selecting the command, the user is shown a dialog box for setting the transfer parameters.

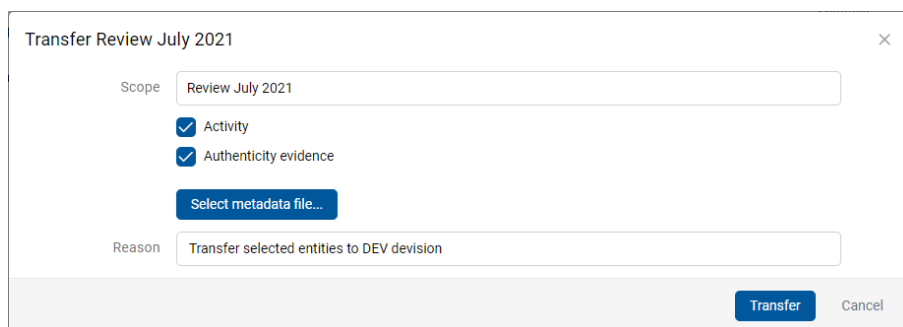


Image 409: Setting the transfer parameters

By selecting the Activity option, the audit log for an individual transferred entity can be included in the transfer.

If entity authenticity evidence has been created on the archive, the user can include it in the transfer by selecting the option Authenticity evidence.

Warning: If the user does not have the AuditLogQuery role and has nevertheless ticked the inclusion of an audit log in the transfer of entities in the transfer dialog box, the transfer is not executed.

In the Include metadata file section, the user invokes a dialog box for selecting an XML file with additional metadata to be included in the transfer.

For a description of the structure of the file with additional metadata see chapter [Format of the additional metadata export file](#).

By selecting the Transfer command, the transfer process begins. Team members can cancel the process by selecting the Cancel command.

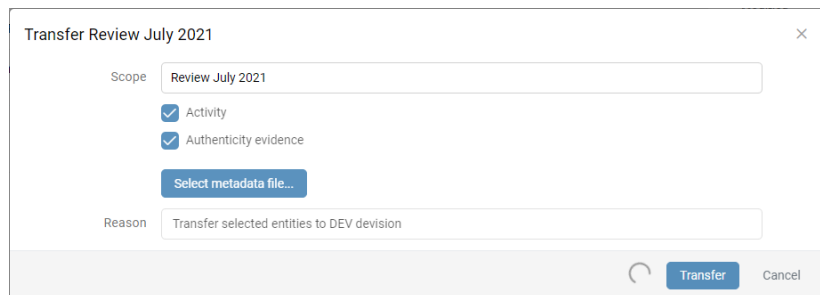


Image 410: Implementing the transfer process

The entities are exported in the XML format to the default directory Downloads. The user can access the transfer information from the notification bar by selecting the action Open file in the popup menu.

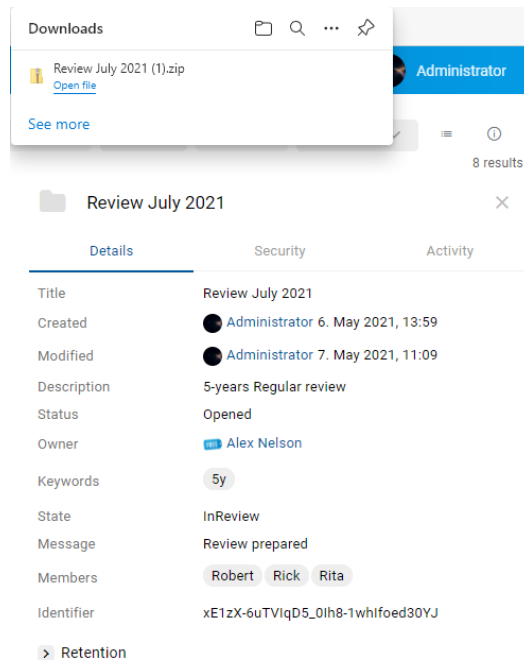


Image 411: Transfer notification

After confirming the selection Open file for the compressed (zip) file, the right view of Windows Explorer shows the export reports and the additional file for the automatic transfer confirmation TransferConfirmation.csv. With it the user of a third archive system can quickly specify which entities will be confirmed as successfully transferred.

For more information see chapter [Format of confirmation file during transfer](#).

Ime	Vrsta	Stisnjena velikost	Zaščiten z geslom	Velikost	Razmerje	Datum spremembe
ExportData	Mapa z datotekami					7.05.2021 11:34
ExportReport	Besedilni dokument	1 KB	Ne	1 KB	62%	7.05.2021 11:34
ExportReport	XML Document	1 KB	Ne	2 KB	62%	7.05.2021 11:34
TransferConfirmation	Microsoft Excelova datoteka z vrednostmi, ločenimi z vejico	1 KB	Ne	1 KB	24%	7.05.2021 11:34

Image 412: Selecting the confirmation file

By selecting the confirmation file TransferConfirmation, information about the entities to be transferred is displayed.

	A	B	C
1	ClassificationCode	Transferred	ReferenceId
2	C=15^D=IS-527	FALSE	
3	C=5^D=IS-CONTENT-281	FALSE	
4	C=8^D=000025	FALSE	

Image 413: Displaying the confirmation file

In the next step the team members can modify the value, which specifies whether the entity has been successfully transferred to a third archive system (FALSE → TRUE), and the reference to the entity transferred to the third archive system (transfer identifier; optional).

	A	B	C
1	ClassificationCode	Transferred	ReferenceId
2	C=15^D=IS-527	TRUE	7498596
3	C=5^D=IS-CONTENT-281	TRUE	7498596
4	C=8^D=000025	TRUE	7498596

Image 414: Confirmation of entities recorded in the confirmation file

Team members select a suitable location for saving the modified confirmation file to the file system with the command Save as.

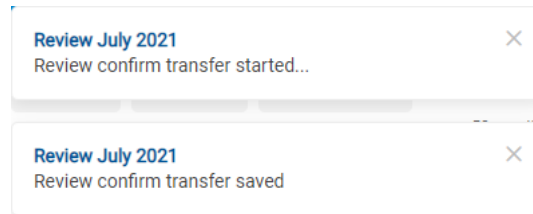


Image 415: Notification of saving the confirmation file

4.6.5.1.1 Export phase

At the start of export IMiS®/wClient creates a new review document.

For more information see chapter [Reviewing and classifying documents](#).

This document represents a report on export from the archive server. It uses the date and time of the start of export in ISO format as the document title.

During export the following two or three log files are created in the file system:

- ExportReport.xml: An XML file which contains:
 - Statistics of successfully and unsuccessfully exported entities.
 - List of unsuccessfully exported entities (including the classification code).
 - List of successfully exported entities (including the compressed value and full classification code).
- ExportReport.txt: contains a report for each successfully or unsuccessfully exported entity.
- ExportReport_ERROR.txt: contains a report for each unsuccessfully exported entity, including the returned error message.

In the event of an error when exporting an entity, the error is recorded in the ExportReport_ERROR.txt file. This file is created only in the event of an error.

After the first transfer phase – export, a new entity is attached to the review contents – a transfer report.

The screenshot shows the IMiS interface for a review entity named 'Review July 2021'. The main table lists the review with the following details:

Title ↓	Description	Modified
2021-05-07T11:34:26.952+02:00	Transfer started at 2021-05-07T11:...	7. May 2021

Below the table, there is a section for 'Decisions - Page 1' with a modified date of 7. May 2021. On the right, a detailed view for 'Review July 2021' is shown, including:

- Title:** Review July 2021
- Created:** Administrator 6. May 2021, 13:59
- Modified:** Administrator 7. May 2021, 12:51
- Description:** 5-years Regular review
- Status:** Opened
- Owner:** Alex Nelson
- Keywords:** 5y
- State:** InReview
- Message:** Review prepared
- Members:** Robert, Rick, Rita
- Identifier:** xE1zX-6uTVIqD5_0Ih8-1whIfod30YJ

A 'Retention' link is also visible at the bottom of the details panel.

Image 416: A report on the transfer between review entities

The transfer report contains the following log files:

- XML report
- Report
- Error report, if an error occurred.

The screenshot shows the IMiS interface for a specific review entity: '2021-05-07T11:34:26.952+02:00'. Below the breadcrumb, a table lists the log files:

Title	Size	Modified
ExportReport.xml	1.6 kB	7. May 2021
ExportReport.txt	837 B	7. May 2021

Image 417: Log files in the transfer report

By selecting the log file ExportReport.txt, the user is shown a report on successfully/unsuccessfully exported entities.

The screenshot shows the content of the 'ExportReport.txt' file. The report details the export process for a review with ID 'xE1zX-6uTVIqD5_0Ih8-1whIfod30YJ'.

```

1 Transfer review id: 'xE1zX-6uTVIqD5_0Ih8-1whIfod30YJ', subject: 'admin', recursive:false, exportParents:true, classes:true, folders:true, documents:true, auditLog:true, evidence:true
2
3 2021-05-07T11:34:27.143+0200 - Exported Class '15' into file ExportData/class_1.xml
4 2021-05-07T11:34:27.553+0200 - Exported Document '15/IS-527' into file ExportData/document_1.xml
5 2021-05-07T11:34:27.714+0200 - Exported Class '5' into file ExportData/class_2.xml
6 2021-05-07T11:34:27.889+0200 - Exported Document '5/IS-CONTENT-281' into file ExportData/document_2.xml
7 2021-05-07T11:34:28.013+0200 - Exported Class '8' into file ExportData/class_3.xml
8 2021-05-07T11:34:28.154+0200 - Exported Document '8/000025' into file ExportData/document_3.xml
9
10 Class entities: OK(3) Fail(0)
11 Folder entities: OK(0) Fail(0)
12 Document entities: OK(3) Fail(0)
13

```

Image 418: An example of an ExportReport.txt report

4.6.5.1.2 Importing to a third archive system phase

All of the previously created files which contain exported entities must be transferred by the authorized user of the target archive to his location and an import of entities must be executed.

A description of the process of importing to a third archive is not covered by this manual.

It is recommended that a confirmation file is created when importing to a third archive, which will enable successful confirmation of the transfer on IMiS®/ARChive Server

For more information see chapter [Format of confirmation file during transfer](#).

4.6.5.2 Transfer confirmation

Prior to completing the transfer, the user must execute transfer confirmation for each entity undergoing the review process which has been marked for transfer.

Confirmation can be executed in one of the following ways:

- Manually for each transferred entity.
- Automatically with a confirmation file.

When the review process is completed, only those entities for which transfer has been confirmed are disposed of.

4.6.5.2.1 Manual transfer confirmation

Manual transfer confirmation is executed similarly to the modification of action on an individual entity in the review process.

For more information see chapter [Modification of the attribute values in the review](#).

The screenshot displays the 'Reviews' section of the IMiS wClient interface. The main table lists various entities with columns for Title, Classification Code, and Action. The 'Conversion test Marko' entity is selected, and its details are shown in a side panel. The 'Action' dropdown menu is open, showing 'Transfer' as the selected option. The side panel shows the 'Details' tab with fields for Title, Classification Code, Action, Reason, Comment, Transferred (checked), and Transfer Identifier.

Title	Classification Code	Action
365	3/IS-365-22	Permanent
benjamin	14-2020-000665	Review
ClassificationCodeTest02	14.669	Review
Conversion test Marko	8/000025	Transfer
Follow ТП России в Абхазии, R Ray Wang (王瑞光) and Kate Gold on Twitter!	5/000056	Review
Gibraltar	15/IS-527	Transfer
Patras	5/1	Review
Versionable content	5/IS-CONTENT-281	Transfer

Conversion test Marko Details

Title	Conversion test Marko
Classification Code	8/000025
Action	Transfer
Reason	Default action changed due to 'Retain' signif
Comment	Manual transfer
Transferred	<input checked="" type="checkbox"/>
Transfer Identifier	7498596

Image 419: Manual transfer confirmation for an individual entity

Team members must specify for each entity on the list whether it has been transferred.

They do so by ticking the box of the Transferred attribute.

If they wish, they can also enter a reference to the transferred entity by entering the value of the “Transfer identifier” attribute.

After completion the team members save all confirmations on the IMiS®/ARChive Server by selecting the Save command.

4.6.5.2.2 Automatic transfer confirmation

If there is a confirmation file from a third archive, team members use it for automatic confirmation of entity transfer. In the Reviews folder they select the review for which they wish the transfer confirmation to be executed. In the command bar they select the Actions command and the action Confirm transfer in the popup menu.

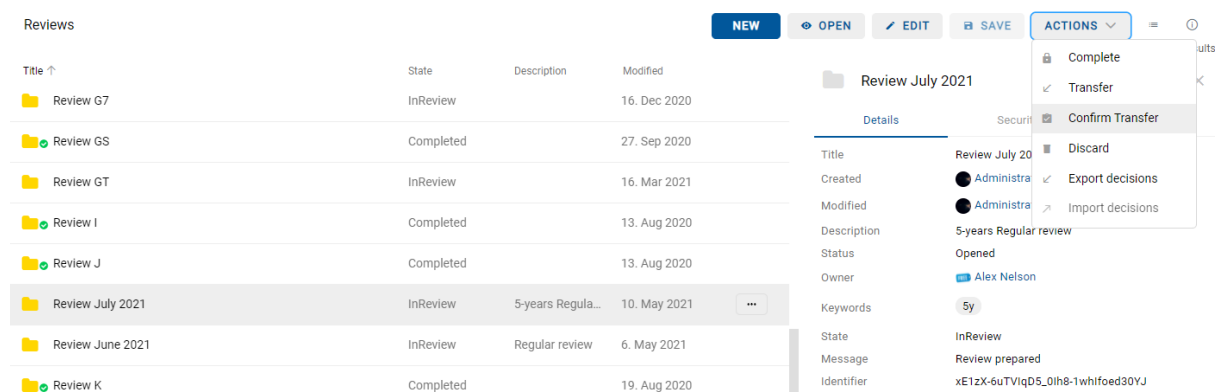


Image 420: Transfer confirmation using a confirmation file

After selecting the command, a dialog box appears for selecting the confirmation file.

They search for the desired file in the file system and confirm their selection with the Open command.



Image 421: Selecting the confirmation file

The confirmation of all entities recorded in the confirmation file begins to be executed.

For more information see chapter [Format of the confirmation file during transfer.](#)

Team members confirm the selection of the confirmation file with Open or cancel it with the Cancel command.

After confirmation the changes are transferred to the relevant review. After refreshing the view of IMiS/wClient the changes are visible to the team members.

4.6.6 Reviewing and classifying documents

An integral part of the review process is the reviewing and classifying of documents, created by team members.

4.6.6.1 Classifying documents

During the review process the team members have the option of adding documents to the review. They select the relevant review from a list and then using the New command in the popup menu they select Document.

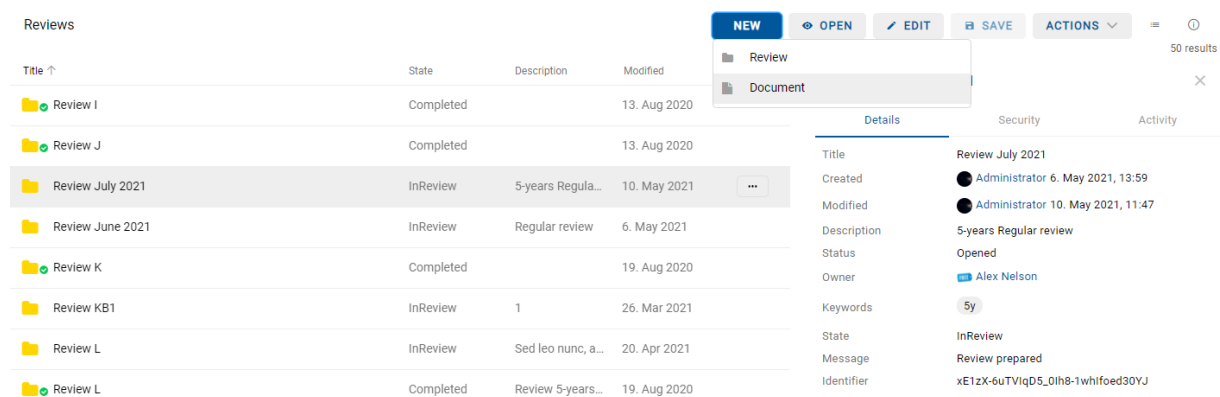


Image 422: Adding documents to the review

The dialog box shows the attributes of the new document.

In the Details tab they define the values of attributes and add contents.

After entering the metadata, they include the document in the review by selecting the action Create.

The 'Create Document' dialog box is shown with the 'Details' tab selected. It contains the following fields and options:

- Parent:** Review July 2021
- Title*:** Review July 2021 document (Mandatory value for naming entity)
- Description:** July entities review
- Security class:** INHERITED
- Significance:** None
- Owner:** Alex Nelson
- Keywords:** (Empty)
- Categories:** review
- Content:** Drag and drop files or click
- External Identifiers:** (Empty)
- Reason:** (Empty)

At the bottom right, there are three buttons: 'Create another' (disabled), 'Create' (active), and 'Cancel'.

Image 423: Adding document metadata

Review July 2021 document

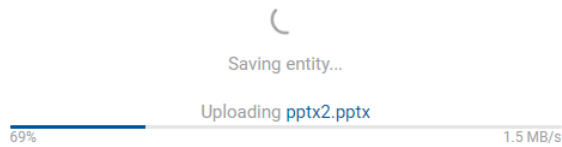


Image 424: Adding a document to the review

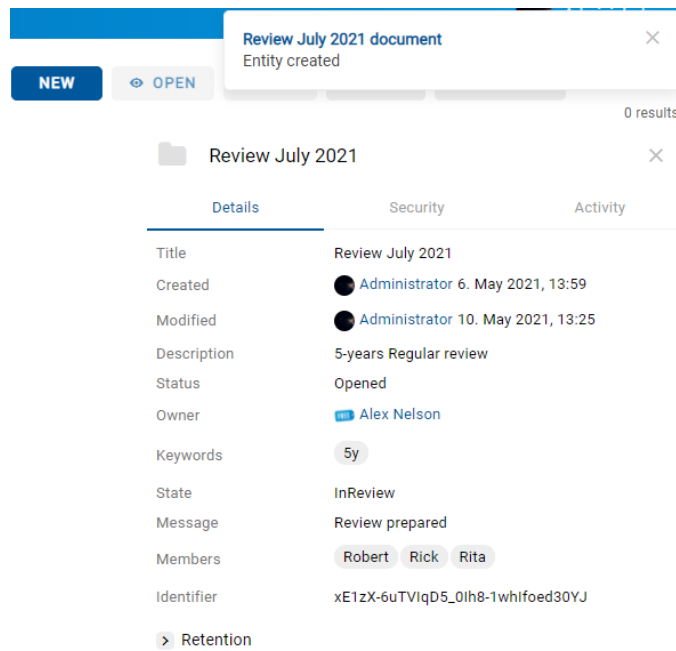


Image 425: Notification about a document added to the review

4.6.6.2 Reviewing documents

The team members can review documents in the review by first selecting the relevant review from the list and opening it. In the center the review pages are shown with the corresponding documents and reports.

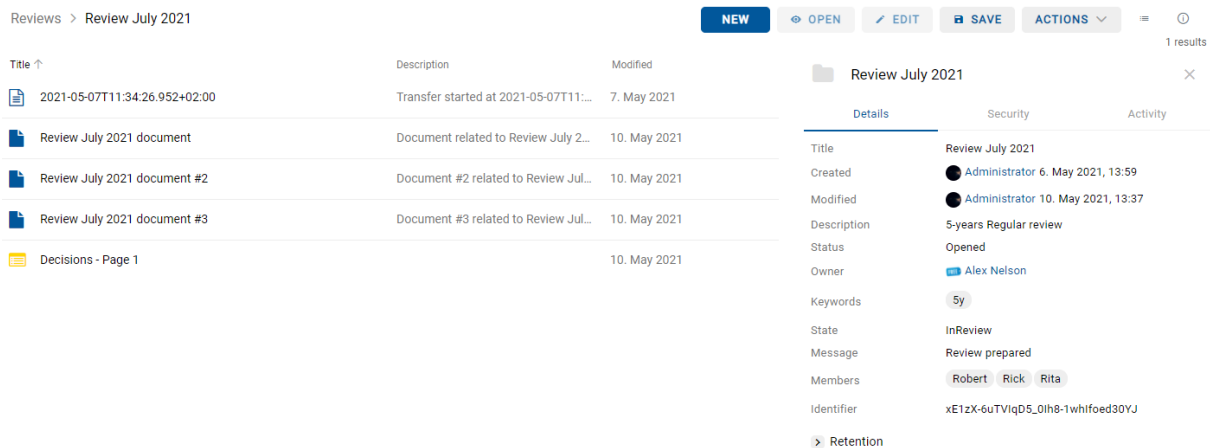


Image 426: Reviewing documents

Examples of classified contents:

- *Review execute report*
- *Transfer report*
- *Team minutes*
- *Attachment*
- *Custom document.*

By selecting the popup menu on the entity selected from the list, the team members have the option of performing various actions on the entity.

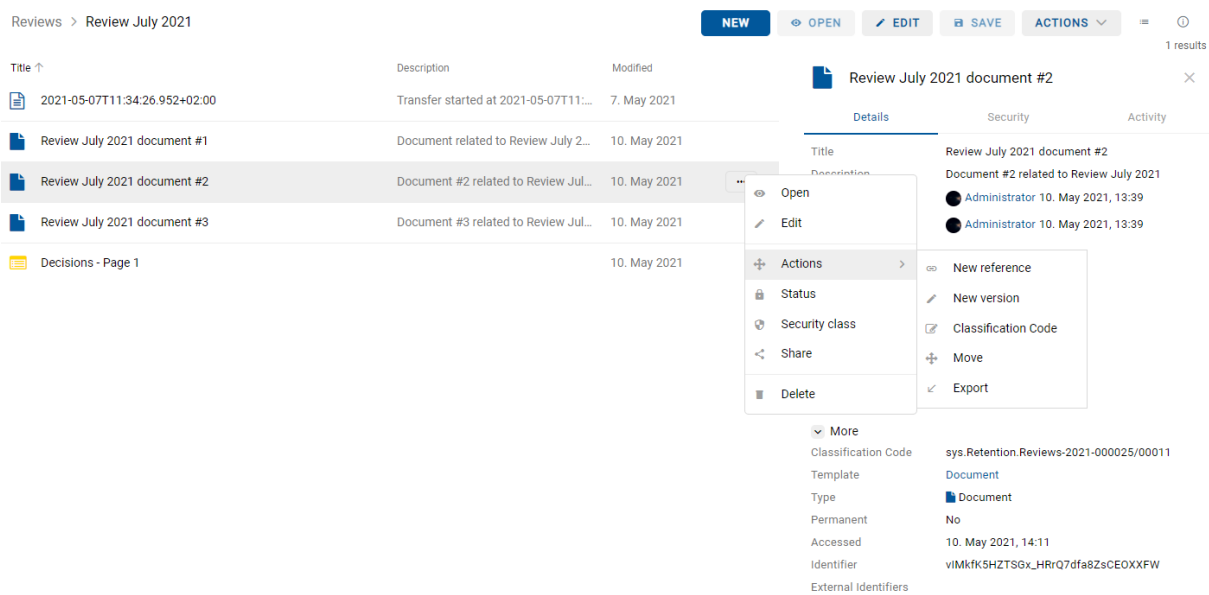


Image 427: Options of performing actions on entities

Warning: A user can export different entities to the same export folder several times without having to delete the export files prior to each export. When saving exported entities to the selected export folder, the previous export files are replaced.

4.7 Roles

A server role is a set of access rights that allow users to execute specific operations on the IMiS®/ARChive Server. An appropriately authorized user can grant the following roles to other users or groups:

- **AuditLogQuery:** allows access to the audit log.
Users with an “AuditLogQuery” role see the Activity tab in the entity information overview and can access the audit trail through this tab.
- **Content management:** The role enables the user to tag content for indexing or conversion.
- **ImportExport:** this role enables the import and export of content. Users with the ImportExport role can perform entity »Import« and Export actions via the popup menu for the entire archive or for an individual entity.
- **Reports:** this role enables the display of system reports on export and import. The Administration folder contains the subfolders Import and Export.
- **DraftManagement:** this role enables viewing and filing/discarding a document draft of other users (combined with the entity access permissions).

5 SYSTEM REQUIREMENTS

System requirements are divided into client requirements and the IMiS®/wClient requirements.

5.1 Hardware

Most current workstations and computers should be able to run the IMiS®/wClient. The workstations and computers being sold on the market today meet the client requirements of the IMiS®/wClient. It needs few resources to operate and works in all of the popular web browsers on Windows, macOS and other operating systems.

5.1.1 Minimum requirements

- Browsers:
 - Chrome ≥ 120
 - Firefox ≥ 121
 - Edge ≥ 120
 - Safari ≥ 17
- Size of available work memory should be about 512 MB larger than the operating system's memory requirements.
- TCP/IP network access (IPv4 or IPv6).

5.1.2 Recommended hardware

- Browsers:
 - Chrome ≥ 120
 - Firefox ≥ 121
 - Edge ≥ 120
 - Safari ≥ 17
- Size of available work memory should be about 1 GB larger than the operating system's memory requirements.
- TCP/IP network access (IPv4 or IPv6).

5.2 Installation requirements

Most current servers should be able to run the IMiS®/wClient.

It needs the IMiS®/Storage Connector Services REST to operate.

5.2.1 Minimum requirements

- IMiS®/Storage Connector Services REST 9.8.2110.110.
- Minimum free disk capacity for installing the IMiS®/wClient is 6GB.
- TCP/IP network access (IPv4 or IPv6).

5.2.2 Recommended requirements

- IMiS®/StorageConnector Services REST 9.10.2310.114.
- Disk capacity for installing the IMiS®/wClient is \geq 6GB.
- Minimum free disk capacity for installing the IMiS®/wClient is 6GB.
- TCP/IP network access (IPv4 or IPv6).

6 INSTALLATION

Below is a description of the installation procedure for the IMiS®/wClient. It can be performed by a user with the appropriate rights (Administrator). The installation is conducted step-by-step and is the same for everyone.

6.1 Installation procedure

The IMiS®/wClient must be installed in an environment that satisfies minimum requirements. The user must have rights on the server on which he is installing the client. The installation package is extracted to a directory on the server selected by the administrator.

Procedure:

1. The administrator extracts the installation package to a directory on the server.
2. He sets the settings.json.

6.1.1 Installation settings

For successful installation the address to the IMiS®/Storage Connector Services REST must be entered into the assets/settings.json as the URL property.

Example of the settings.json:

```
{
  "url": "https://apps.imis.eu/scsvc",
  "requestTimeout": 240000
}
```

url	String	Address of the IMiS®/Storage Connector Services REST.
requestTimeout	Integer	The timeout of an individual request to the service in <i>ms</i> (optional). The default value is 120000.
logLevel	String	Log records level (optional). Set of values: - DEBUG - INFO - WARNING - ERROR (default) - NONE.
entitiesPageSize	Integer	The number of entities loaded when displaying a single page (optional, default value: 50).

search.maxElements	Integer	Maximum number of search results displayed. The user can change this value in the profile settings, where they also have the option to reset it to this value (optional).
search.hideFields	String []	Collection of fields which are hidden in the search dialog by default.
scan.apiKey	String	The key to accessing IMiS®/wScan (optional).
scan.url	String	The address of IMiS®/wScan (optional).
collections.maxSize	Integer	The maximum number for loading the collection. The user can change this value in the profile settings, where they also have the option to reset it to this value.
collections.displaySearchButton	Boolean	Specifies whether the button for showing the search dialog is displayed when the collection does not load.
collections.displayLoadButton	Boolean	Specifies whether the button for loading the collection is displayed when the collection does not load.
preview.word	String	Defines the URL to the Office Online service for previewing Word contents (optional).
preview.excel	String	Defines the URL to the Office Online service for previewing Excel contents (optional).
preview.powerpoint	String	Defines the URL to the Office Online service for previewing PowerPoint contents (optional).
preview.onenote	String	Defines the URL to the Office Online service for previewing OneNote contents (optional).
details.profiles	DetailsProfile []	Profiles collection for configuring the display of entity details.
details.display	DetailsDisplay []	Collection of settings for the display of entity details.
details.virtual_attributes	DetailsVirtualAttribute []	Virtual attributes collection for the display of entity details.

CollectionProfile

This object defines the profile for the columns display in the collections display.

Id	String	Profile identifier.
Columns	String [] or CollectionProfileColumn []	Collection of displayed columns. The collection type can be "object" or "string".

CollectionProfileColumn

This object defines the profile for the column display in the collections display.

id	String	Attribute identifier.
min_width	Number	Minimum width of the table in px, where the column is displayed.
width	Number	Column width in %.

CollectionView

This object represents the settings for the collections view.

archives	String []	Collection of archive identifiers.
profile	String	Profile identifier from collections.profiles.
members	String []	Collection of directory entities.
classification_code	String []	Collection of classification codes.
context	String []	The view context (optional). The set of values: - ARCHIVE - MY_ENTITIES - DRAFTS - DIRECTORY - REVIEWS - EXPORT - IMPORT - DELETED - DISPOSED - QUEUE.

SearchProfile

This object defines the search view profile.

id	String	Profile identifier.
attributes	String []	Collection of attributes.
filter_type	String	Type of attribute filter. The set of values: - Include: certain attributes will be displayed. - Exclude: certain attributes will not be displayed.

SearchView

This object represents the settings for the search view.

profile	String	Profile identifier from search.profiles.
archives	String []	Collection of archive identifiers.
members	String []	Collection of directory entities.
editable	Boolean	Defines whether the search view can be edited. The set of values: - true: The user modifies the view which is saved to the user settings. Default value. - false: Disables editing the view.

DetailsProfile

This object defines the profile for the entity details view.

id	String	Profile identifier.
filter_type	String	Type of attribute filter. The set of values: - Include: certain attributes will be displayed. - Exclude: certain attributes will not be displayed.
attributes	String []	Collection of attributes. If filter_type = Include, the order applies.
sections	String []	Collection of displayed sections. If this element has not been defined, all sections are displayed.

DetailsDisplay

This object represents the settings for the entity details view.

profile	String	Profile identifier from details.profiles.id.
archives	String []	Collection of archive identifiers.
templates	String []	Collection of templates to which the profile applies. If this element has not been defined or is empty, it applies to all templates.
members	String []	Collection of directory entities of type "user" or "group". The "subject" or "alias" is defined for the user. If a group has been defined, the setting applies to all members.

DetailsVirtualAttribute

This object defines the virtual attribute.

id	String	The attribute identifier used in the profile definition in the attributes collection (DetailsProfile / attributes).						
label	Object	This attribute label represents an object where the label can be defined in different languages. <table border="1" data-bbox="874 1227 1375 1473"> <tr> <td>en</td> <td>String</td> <td>Label in the English language.</td> </tr> <tr> <td>sl</td> <td>String</td> <td>Label in the Slovenian language.</td> </tr> </table>	en	String	Label in the English language.	sl	String	Label in the Slovenian language.
en	String	Label in the English language.						
sl	String	Label in the Slovenian language.						
description	String	Attribute description.						
type	String	Attribute type. The set of values: - DATE, - DATE_TIME, - TIME, - STRING.						
value	String	The expression for calculating the value of the attribute where access is enabled to the entity properties (this.entity), the parent entity (this.parent) and the selected language (this.lang).						

6.2 Upgrade procedure

1. The administrator copies the current "assets/settings.json" to a temporary directory.
2. Deletes the directory containing the IMiS®/wClient.
3. Extracts the installation package to the directory.
4. Replaces the settings.json from the temporary directory.

7 MANAGING PRODUCT

The IMiS®/wClient can be managed by a user with the appropriate rights (e.g. administrator).

The user must first log in to access the archive.

For more information on logging in/out see chapter [Login and logout](#).

The user stops the IMiS®/wClient by logging out and closing the tab/window of the web browser.

8 TROUBLESHOOTING

Users of the IMiS®/wClient must know how to handle the product correctly and are advised to follow instructions provided by documentation. If you encounter issues or errors, it is important to follow proper procedures. The first thing that is advised is to contact the IT expert or system administrator of your company.

Administrators are advised to troubleshoot errors with the help of the appropriate manual. If you cannot discover the cause of the issue or find the appropriate fix, feel free to contact IMiS® software support and we'll be glad to offer assistance. Be advised that a layperson's interference can make things worse and further destabilize the system.

8.1 How to avoid problems

Regular updating of the IMiS®/wClient is essential to keep issues at a minimum. Every new version of IMiS® software fixes known bugs and errors.

If you want to make sure things run smoothly, a highly recommended choice is our optional maintenance contract. A valid maintenance contract will protect you from serious errors or system outage. Several kinds of maintenance contracts are available:

- Primary, where the developer takes over the complete process of system maintenance.
- Secondary, where the developer fixes serious or less frequent errors, while users and their IT service perform regular maintenance and troubleshooting.

Maintenance contracts can be tailored to the specific needs of IMiS® software users. Ask for a deal and we'll be happy to assist you.

8.2 Frequent errors

This chapter describes errors that may be frequently encountered while using the IMiS®/wClient. Each error is paired with the possible reasons and the steps that should allow you to fix it.

Error when accessing an archive

Likely cause: There was an error in establishing a connection with the IMiS®/ARChive Server, which can be due to:

- Wrong IP address.
- Invalid network port.
- Firewall on the client, or on the network between the client and the server, that prevents communication between the client and the server.

Solution: First, check the validity of the IP address and the network port. If that's not the cause, check if communication between the client and the server is open and reconfigure any firewalls as necessary.

Invalid Username or password

Likely cause: Invalid username or password.

Solution: Check whether the username and password have been entered correctly (e.g. use of capital/small letters, without initial or end spaces, etc.).

If that does not solve the problem, notify the administrator who will check whether a user with that name is actually registered on the IMiS®/ARChive Server.

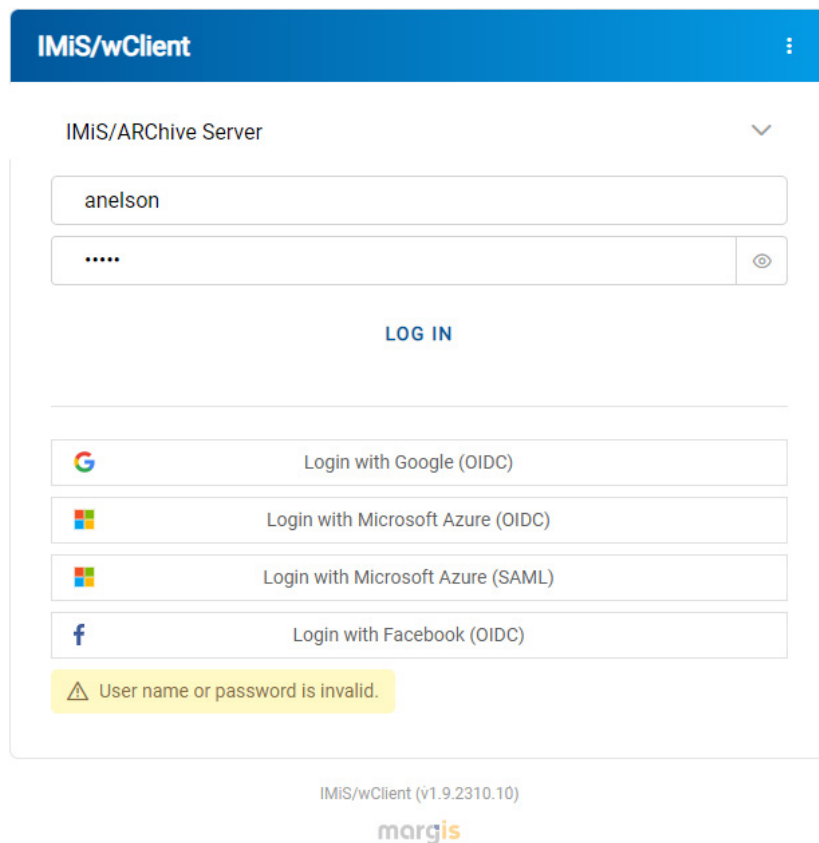


Image 428: An example of the error: User name or password invalid

Entity cannot be created since Classification Code generator is not defined for its hierarchy depth.

Likely cause: Creating a folder in the classification scheme at a too low level.

When saving a new folder, a classification code is automatically generated, however, the classification code generator on the IMiS®/ARChive Server supports the generation only to a certain level in the classification scheme, and not beyond it.

Solution: Creating a folder at a higher level, which is still supported by the classification code generator on the server.

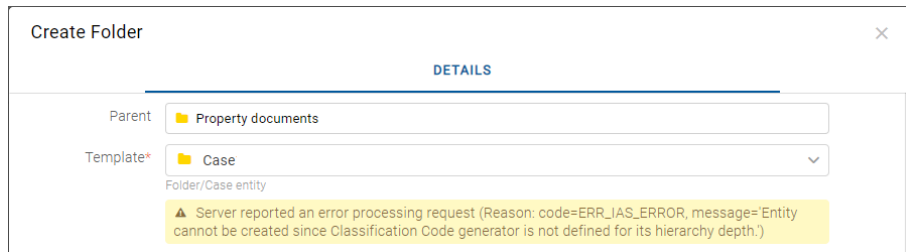


Image 429: An example of an error when saving a new folder

[Class, Folder, Document] <classification code> cannot be edited.

Likely cause: The entity is already open in editing mode on another computer.

Solution: Wait until the other user finishes editing and then open the entity once again.



Image 430: An example of an error when opening an entity in editing mode

Content scanning icon does not appear

Likely cause: Wrong key for accessing the IMiS®/Capture Service.

Solution: In the IMiS®/Capture Service settings check the suitability of the key in the “Security” tab. The service key value in the IMiS®/Capture Service settings must match the API key value in the user profile settings (“Profile / Settings”) of the IMiS®/wClient.

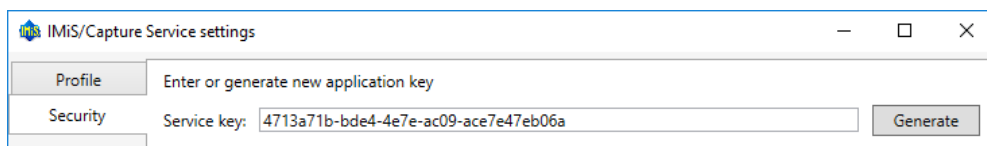


Image 431: Example of defining the service key