



**IMiS[®] /wClient
Manual**

Version 1.4.1910

**IMAGING
SYSTEMS**

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TABLE OF CONTENTS

1	PREFACE	13
1.1	About the manual.....	13
1.2	Target audience.....	13
1.3	Conventions.....	13
1.4	Terms and abbreviations	14
2	INTRODUCTION.....	18
2.1	Features.....	18
2.2	Versioning and numbering	19
2.3	Functionalities	20
2.4	New functionalities in this version.....	21
3	TECHNICAL DOCUMENTATION	23
3.1	Client architecture.....	23
3.2	Format of import / export files	23
3.2.1	File structure	25
3.2.2	List of XML tags and their meaning	25
3.2.3	Format of the additional metadata export file	43
3.3	Format of the confirmation file during transfer	45
4	USER MANUAL.....	46
4.1	Login and Logout.....	46
4.1.1	Cookie Policy.....	46
4.1.2	Localization.....	47
4.1.3	About	48
4.1.4	Login.....	48
4.1.5	Logout	50
4.2	Interface description	50
4.2.1	Classification scheme.....	57
4.2.2	List of entities	61
4.2.3	Entity information	64
4.2.4	Command bar	77
4.2.5	Menu functions	78
4.2.6	Search.....	86
4.3	Actions.....	87
4.3.1	Entity access.....	87
4.3.2	Creating an entity	89
4.3.3	Editing entity data.....	104
4.3.4	Entity move	120
4.3.5	Content management.....	124
4.3.6	Versioning.....	147
4.3.7	Search functions	154

4.3.8	Archiving email messages.....	170
4.3.9	Acquiring authenticity evidence	176
4.3.10	Import.....	181
4.3.11	Export.....	186
4.3.12	Deletion of an entity	194
4.4	System attributes	200
4.4.1	General system attributes.....	201
4.4.2	Security class change attributes	203
4.4.3	Moved entity attributes	203
4.4.4	Deleted entity attributes.....	204
4.4.5	Transferred entity attributes.....	204
4.4.6	Email attributes	204
4.4.7	Physical content attributes.....	205
4.4.8	Review process attributes	205
4.4.9	Entity attributes in the decision-making process.....	206
4.5	Authenticity	207
4.5.1	Digital certificate.....	207
4.5.2	Electronic signature	208
4.6	Review process.....	211
4.6.1	Preparation phase	212
4.6.2	Decision-making phase.....	219
4.6.3	Implementation phase.....	224
4.6.4	Disposition.....	226
4.6.5	Transfer of entities.....	227
4.6.6	Reviewing and classifying documents.....	234
4.7	Roles	238
5	SYSTEM REQUIREMENTS.....	239
5.1	Hardware.....	239
5.1.1	Minimum requirements.....	239
5.1.2	Recommended hardware	239
5.2	Installation requirements.....	240
5.2.1	Minimum requirements.....	240
5.2.2	Recommended requirements.....	240
6	INSTALLATION.....	241
6.1	Installation procedure.....	241
6.1.1	Installation settings	241
6.2	Upgrade procedure.....	242
7	MANAGING PRODUCT.....	242
8	TROUBLESHOOTING.....	243
8.1	How to avoid problems.....	243
8.2	Frequent errors.....	243

TABLE OF IMAGES

Table of images appearing in the manual

Image 1: Client architecture.....	23
Image 2: XPath notation text example	24
Image 3: Example XSD scheme.....	44
Image 4: Example additional metadata export file	44
Image 5: Example of a confirmation file after transfer.....	45
Image 6: Login on archive.....	46
Image 7: Cookie Policy	47
Image 8: Language selection	47
Image 9: About dialog box.....	48
Image 10: A list of available archives	49
Image 11: Logging into the archive	49
Image 12: Log out of the archive.....	50
Image 13: User interface of the IMiS®/wClient.....	50
Image 14: Categories in the left view	51
Image 15: A list of mixed entity types.....	52
Image 16: Movable dividing line between the left and central view	53
Image 17: Entity information	54
Image 18: Display of the command bar	54
Image 19: Header of the user interface	55
Image 20: Hierarchical position of the entity within the tree structure.....	55
Image 21: Narrowing the user interface display.....	56
Image 22: Access to folders in the left view via the menu	57
Image 23: Display of folders in the left view of the web client IMiS®/wClient	58
Image 24: The tree view of the classification scheme in the »Archive« folder	58
Image 25: Selecting the entity in the »My entities« folder in the central view	59
Image 26: Selecting the »Drafts« folder in the left view.....	59
Image 27: The »Directory« folder in the left view	60
Image 28: User data.....	60
Image 29: A list of contained entities of the selected entity.....	62
Image 30: Limiting the display of a greater number of entities on the list.....	62
Image 31: Limiting the set of entities displayed on the list with a search.....	63
Image 32: Selecting the order of displaying the list of entities.....	63
Image 33: Tabs containing entity information in the reading mode	64
Image 34: The »Details« tab in the reading mode	65
Image 35: Custom metadata in the reading mode.....	66
Image 36: »Custom« metadata in edit mode.....	66

Image 37: Specifying multi-value attributes.....	67
Image 38: The »Details« tab in reading mode.....	68
Image 39: References in the »Details« tab.....	68
Image 40: Email data in the reading mode.....	69
Image 41: Email data in the editing mode.....	69
Image 42: Physical content data in the reading mode.....	70
Image 43: Physical content data in the editing mode.....	70
Image 47: A report on checking the validity of electronic signatures and digital certificates.....	71
Image 44: Retention and disposition hold periods in the »Retention« tab.....	71
Image 45: Information on disposition hold	72
Image 46: Retention policy information.....	72
Image 48: The »Security« tab for a logged user in the preview mode	74
Image 49: A list of effective permissions for the logged user in the preview and reading mode	74
Image 50: A list of users/groups with access rights to the entity in the reading mode	75
Image 51: The »Activity« tab in the preview and reading mode.....	76
Image 52: Information about the user who performed an action on the entity.....	76
Image 53: Command bar above the information of the selected entity.....	78
Image 54: Omogočanje/onemogočanje prikaza podatkov o entiteti.....	78
Image 55: Popup menu in the header of the user interface	79
Image 56: Display of the window with user details	79
Image 57: Notification window for entering the reason for performing the action.....	80
Image 58: Dialog box for disabling the entry of the reason for performing actions.....	80
Image 59: Display of the window for changing the user password.....	81
Image 60: Setting the display of entities	82
Image 61: Entities shown on a list	82
Image 62: Entities shown in a grid.....	83
Image 63: Selecting entities for performing actions.....	83
Image 64: Set of actions on selected entities	83
Image 65: An example of an entity with a defined value of the »Categories« attribute	84
Image 66: A categorized »Categories« view	85
Image 67: A categorized »Keywords« view.....	85
Image 68: Display of the columns of the selected attributes of »Title« and »Description«.....	86
Image 69: Modifying a template in editing mode.....	89
Image 70: Creating a root class.....	90
Image 71: Display of contained entities.....	90
Image 72: Display of creating a new document with custom attributes	92
Image 73: Entry of required metadata.....	92
Image 74: Entry of text metadata.....	93
Image 75: Entry of date and time metadata.....	93
Image 76: Displaying the inherited value of the date field of the parent entity	93

Image 77: Entry of metadata with predefined values	93
Image 78: Entry of multiple values into a field.....	94
Image 79: Entering multiple values of an attribute	94
Image 80: Entering the values of multiple directory entities.....	95
Image 81: Selecting the type of classification code entry for the contained entity	96
Image 82: Manual entry of a child entity's classification code	97
Image 83: Display of manually entered classification code.....	97
Image 84: Specifying the security class of a new entity	97
Image 85: Entity information after entering the security class	98
Image 86: Specifying the status of a new entity.....	99
Image 87: Display of the entry of physical content metadata	100
Image 88: The date of the last change of the »Status« attribute.....	100
Image 89: Selecting validity for a specific type of entity	101
Image 90: Display of the »Retention« tab	101
Image 91: Saving a new or modified entity	102
Image 92: Example classification code.....	102
Image 93: Example creator of entity.....	103
Image 94: Example date and time an entity was created	103
Image 95: Example date and time of last changes to the entity	103
Image 96: Example date and time of last access to the entity	103
Image 97: Example date and time an entity was opened.....	103
Image 98: Example date and time an entity was closed.....	104
Image 99: Example entity identifier	104
Image 100: Editing of the physical content metadata.....	105
Image 101: Popup menu for selecting the status of the physical content	105
Image 102: »Security« tab in editing mode.....	106
Image 103: Searching a directory entity on a list	107
Image 104: List of directory entities with access rights to the entity.....	107
Image 105: Setting the inheritance of access permissions to contained entities	108
Image 106: Setting the temporal validity of access permissions.....	108
Image 107: A list of access permissions for a specific attribute	109
Image 108: Popup menu for selecting access rights to a selected metadata	110
Image 109: List of user permissions on the selected metadata.....	111
Image 110: The »Retention policy« tab in editing mode	112
Image 111: The »Disposition hold« tab in editing mode	112
Image 112: The popup menu for selecting the »Status« command.....	113
Image 113: Selecting the status and giving the reason for the change.....	114
Image 114: Selecting the status and giving the reason for the change	114
Image 115: The popup menu for selecting the »Security class« command	115
Image 116: Selecting the security class.....	115
Image 117: Selecting the security class and giving the reason for the change	116

Image 118: Selecting the command »Share« in the popup menu.....	116
Image 119: Displaying the created link to the selected entity	117
Image 120: Copying the link to the selected entity	117
Image 121: Notification of copying a link to the clipboard	117
Image 122: The popup menu for selecting the »New reference« command.....	118
Image 123: The dialog box for adding and editing a reference.....	118
Image 124: Selecting »Search for entity« in the »New reference« dialog box	119
Image 125: Adding the »Title« and »Description« in the »New reference« dialog box.....	119
Image 126: Removing a reference before saving.....	119
Image 127: A dialog box for selecting an action on the reference	120
Image 128: Selecting the »Move« command via the »Actions« command in the command bar.....	121
Image 129: A popup menu on the selected entity for selecting the »Move« command	121
Image 130: A dialog box for moving an individual entity	122
Image 131: Manually assigning the classification code when moving	122
Image 132: A dialog box for moving multiple entities.....	123
Image 133: The »Content« field for adding contents.....	125
Image 134: The added content before saving	125
Image 135: The added content after saving	126
Image 136: Displaying the list of contents in open mode.....	126
Image 137: Displaying the icon »Scan« for capturing content from a scanner.....	127
Image 138: Integrated window for scanning with IMiS®/wScan.....	127
Image 139: Displaying the document after finishing the scan	128
Image 140: A scanned document added to the list.....	129
Image 141: An example of scanning settings.....	129
Image 142: Content details in the right view	130
Image 143: Changing the description of content in editing mode	131
Image 144: Popup menu on the selected content in the reading mode.....	131
Image 145: An example of the content type of a document.....	132
Image 146: An example of the date of creating the document content.....	132
Image 147: An example of the date of modifying the document content.....	132
Image 148: An example of the date of the last access to the document content.....	132
Image 149: An example of the document content identifier	132
Image 150: An example of a display of indexed document content.....	133
Image 151: An example of a display of signed document content.....	133
Image 152: Opening document content	133
Image 153: Opening content by clicking on the content.....	133
Image 154: Loading content.....	134
Image 155: Displaying the menu for selecting and previewing content.....	134
Image 156: Opening audio content	135
Image 157: Opening video content.....	136
Image 158: Selecting the »Download« command in the popup menu.....	136

Image 159: Displaying the progress of the download of content.....	137
Image 160: Displaying the option of selecting actions on downloaded content.....	137
Image 161: Selecting the »Copy« command in the popup menu.....	137
Image 162: Copying the content to another document.....	138
Image 163: Information about saving a copy of the content.....	138
Image 164: Selecting the command »Share« in the popup menu	139
Image 165: Displaying the created link to the selected content.....	139
Image 166: Notification of copying a link to the clipboard	139
Image 167: Selecting the »Update« command in the popup menu.....	140
Image 168: The selected content after update	140
Image 169: Selecting the »Move« command in the popup menu.....	140
Image 170: Selecting the target document for moving content.....	141
Image 171: Content temporarily removed from the document.....	141
Image 172: Saved document content.....	141
Image 173: The content on the list before deletion.....	142
Image 174: Empty list after deletion.....	142
Image 175: Selecting the »Queue for Indexing« command	143
Image 176: Successful adding of content for indexing.....	143
Image 177: Selecting the »Queue for Conversion« command.....	144
Image 178: Successful tagging of content for later conversion.....	145
Image 179: Detaching the selected converted content.....	146
Image 180: Tagging content for detachment.....	146
Image 181: Displaying detached content on the list.....	147
Image 182: Selecting the action »New version« in the popup menu.....	147
Image 183: Checking out a document version.....	148
Image 184: Information about saving a document version	149
Image 185: Displaying document versions in the set »Versions«.....	149
Image 186: A popup menu on the document version	150
Image 187: Opening a document version in editing mode	150
Image 188: Saving a draft for later editing.....	151
Image 189: A draft of a document version in the »Drafts« folder.....	152
Image 190: Displaying the draft in the list of versions	152
Image 191: Discarding a document draft with the »Discard« command.....	153
Image 192: Reviewing a draft before checking it in with the »Save« command.....	154
Image 193: Entering a search string in the »Search« field.....	155
Image 194: A full text search result.....	155
Image 195: Entering a search string in the »Full text search« field	156
Image 196: Entering text to limit the set of attributes for the search	156
Image 197: Example of limiting the set of attributes for the search	157
Image 198: Limiting the set of attributes for the search via the menu	157
Image 199: A wildcard search by using special characters.....	157

Image 200: Searching using operators.....	158
Image 201: A dialog box for searching by metadata	159
Image 202: A dialog box for searching by custom metadata	160
Image 203: Specifying the time range of searching by »Date modified«.....	160
Image 204: Use of special characters in a search string.....	161
Image 205: An example of a result of searching by metadata using special characters.....	161
Image 206: A dialog box for searching by the metadata »Owner«.....	162
Image 207: The search string and the results of searching by actual value.....	163
Image 208: A dialog box for searching by the content description.....	163
Image 209: Use of special characters in a search string.....	164
Image 210: Entering a search string in a combined search	165
Image 211: Entering a search string when searching by metadata and the content description	166
Image 212: Results of searching by metadata and the content description	166
Image 213: Entering a search string when searching by the text of the content and the content description	167
Image 214: Displaying the result of searching by the text of the content and the content description.....	167
Image 215: Entering the search string when searching by a custom attribute.....	167
Image 216: Information on audit log events.....	168
Image 217: List of audit log events.....	169
Image 218: Viewing audit log events in the CSV format	170
Image 219: Viewing audit log events in the XML format.....	170
Image 220: Preparing the environment for transferring an email message from the email client to the archive	171
Image 221: Dropping the email message to the selected entity	172
Image 222: Viewing and editing the details of an email message before saving	173
Image 223: Displaying a saved email message on the list of entities.....	174
Image 224: Contents of the email message.....	175
Image 225: Display of the metadata transferred from the email message	176
Image 226: The popup menu for selecting the »Authenticity evidence« command.....	177
Image 227: Obtaining authenticity evidence in the »Details« tab	178
Image 228: Information for the user about saving a directory with authenticity evidence.....	178
Image 229: A directory with two files containing authenticity evidence	179
Image 230: Example archive information package.....	179
Image 231: Example evidence record	181
Image 232: Selecting the compressed file with the imported entities	181
Image 233: Displaying an import notification	182
Image 234: Display of the »Import« folder in the »Administration« system folder.....	182
Image 235: Set of available actions on the import/export report.....	183
Image 236: Popup menu on a report.....	184

Image 237: Display of the import report in the »Import« system folder	185
Image 238: Selecting the »Export« command at the level of the entire classification scheme	186
Image 239: Setting the export parameters.....	186
Image 240: Notification about saving a file of exported entities of the entire classification scheme	187
Image 241: Information about the export of the entire classification scheme	187
Image 242: Display of a more detailed notification about the export of the entire classification scheme	187
Image 243: Selecting the »Export« action	188
Image 244: Setting the export via a dialog box	188
Image 245: Implementing the export procedure.....	189
Image 246: Notification about saving a file of individual exported entities.....	190
Image 247: Information about the export of a part of the classification scheme	190
Image 248: Display of the »Export« folder in the »Administration« system folder and the document selected for export	190
Image 249: Nabor razpoložljivih dejanj na poročilu o izvozu	191
Image 250: Popup menu on the export report.....	192
Image 251: An example of an error report in the export procedure	193
Image 252: Export report	193
Image 253: Display of a more detailed notification about the export.....	194
Image 254: Selecting the »Delete« command	195
Image 255: A dialog box for deleting an individual entity.....	195
Image 256: A dialog box for deleting multiple entities.....	196
Image 257: Marking an entity for later deletion.....	197
Image 258: A list of entities suggested for deletion in the »Delete queue list« folder.....	197
Image 259: Removing an entity from the delete queue list.....	199
Image 260: Display of the »Deleted« folder in the »Administration« system folder	200
Image 261: Popup window containing the result of the document's electronic signature verification.	209
Image 262: Example of a report for a valid electronic signature and valid digital certificate....	210
Image 263: Example of a valid electronic signature and an expired digital certificate.....	210
Image 264: Example of a valid electronic signature for which the certification authority could not be verified.....	210
Image 265: Example of an invalid electronic signature due to a modification of the document after signing.	211
Image 266: The »Reviews« folder in the left view	212
Image 267: A list of reviews in the review process.....	212
Image 268: Selecting the review type	213
Image 269: Creating a new »Regular review« in the preparation phase.....	213
Image 270: Display of review attributes in the review process	214

Image 271: Access permissions for review in the »Security« tab.....	214
Image 272: Entering a search expression in the »Ad hoc« review.....	215
Image 273: Display of the attributes of the review process in the »Ad hoc« mode.....	215
Image 274: Display of a saved ad-hoc review	216
Image 275: Cancellation of the review process using the »Discard« command	217
Image 276: A canceled decision-making phase.....	217
Image 277: Display of the review in the preparation phase in the »Preparing« state.....	218
Image 278: Display of an error which occurred during the preparation phase of the review process.....	219
Image 279: Display of the review pages and documents.....	219
Image 280: A list of selected entities on a specific review page	220
Image 281: Defining the columns of selected attributes in the popup menu	220
Image 282: Option of viewing an entity from the review	221
Image 283: Adding and modifying attribute values in editing mode.....	221
Image 284: Modifying the action of an entity in editing mode.....	222
Image 285: Modifying attribute values in the review	223
Image 286: Starting the process of completing the review	224
Image 287: During the process of completing the review.....	224
Image 288: Review execute report.....	225
Image 289: Review completed.....	225
Image 290: A list of disposed entities in the review process	226
Image 291: Display of the list of disposed entities on the review page	226
Image 292: Transfer of entities in the review process.....	227
Image 293: Setting the transfer parameters	228
Image 294: Implementing the transfer process	228
Image 295: Transfer notification	229
Image 296: Selecting the confirmation file	229
Image 297: Displaying the confirmation file.....	229
Image 298: Confirmation of entities recorded in the confirmation file	230
Image 299: Notification of saving the confirmation file	230
Image 300: A report on the transfer between review entities	231
Image 301: Log files in the transfer report	231
Image 302: An example of an »ExportReport.txt« report.....	232
Image 303: Manual transfer confirmation for an individual entity	233
Image 304: Transfer confirmation using a confirmation file	233
Image 305: Selecting the confirmation file	234
Image 306: Adding documents to the review	234
Image 307: Adding document metadata.....	235
Image 308: Adding a document to the review	235
Image 309: Notification about a document added to the review	236
Image 310: Reviewing documents.....	237

Image 311: Options of performing actions on entities.....	237
Image 312: An example of the error: Invalid or incorrect password	244
Image 313: An example of an error when saving a new folder	245
Image 314: An example of an error when opening an entity in editing mode	245

LIST OF TABLES

Below is a list of tables appearing in the manual:

Table 1: Manual font types and their meaning	13
Table 2: Definition of abbreviations.....	16
Table 3: List of terms used in the manual.....	17
Table 4: Terminology explanation	24
Table 5: Lists of XML tags	43
Table 6: Description of possible attribute properties.....	201
Table 7: Description of general system attributes.....	203
Table 8: Description of security class change attributes	203
Table 9: Description of moved entity attributes.....	203
Table 10: Description of deleted entity attributes.....	204
Table 11: Description of moved entity attributes.....	204
Table 12: Description of email attributes.....	204
Table 13: Description of physical content attributes	205
Table 14: Description of review process attributes.....	206
Table 15: Description of entity attributes in the decision-making process.....	206

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.1.4.1910.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.
- 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 1.2.1810 of the IMiS®/wClient module:

New functionalities:

- Supports fields for selecting multiple directory entities.
- Entity import.
- Integration with IMiS®/wScan.
- Display of effective permissions for each user.
- Display and management of the inheritance of ACL entries.
- Searching by the attribute »Modified«.
- Sorting by the attribute »Modified«.
- Searching by directory entities.
- Searching a directory entity by the text entered in the search box.
- Faster loading of a greater number of directory entities.
- Searching by actual value.
- Login with impersonalization.
- Modified entity template.
- Selecting multiple entities in the collection to be moved and deleted.
- Supports attributes with multiple values.
- Preview of PDF contents in the Microsoft Edge browser.
- Creating an entity in the dialog box for moving.
- Selecting the displayed columns in deleted entities and drafts.
- Adding the reason for executing an action.
- Displaying all custom attributes in the dialog box for searching.
- Copying the link (URL) to the entity and content.
- Audit log search.
- Setting the inherited value.
- Flexible numbering of entities.
- Filtering fields in the dialog box for searching.
- Limiting the display of larger collections.
- Displaying the date and time of creating and modifying a directory entity.

- Setting the classification code when moving an entity.
- Setting the validity of access permissions for the selected entity, for subentities and in the delegate context.

Improvements:

- Displaying entity details by selecting the icon »Information« in the command bar.
- A clearer view of entity details by narrowing the UI.
- A link to the object preview.
- The menu designed for selecting content in the preview mode.
- Displaying a draft in the versions list.
- Dynamic dividing line between the left and central view.
- A notification window when importing entities.
- Record of the parent entity in the entity details.
- Improved reading of entity collections.
- Framework upgraded to Angular 8.

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.

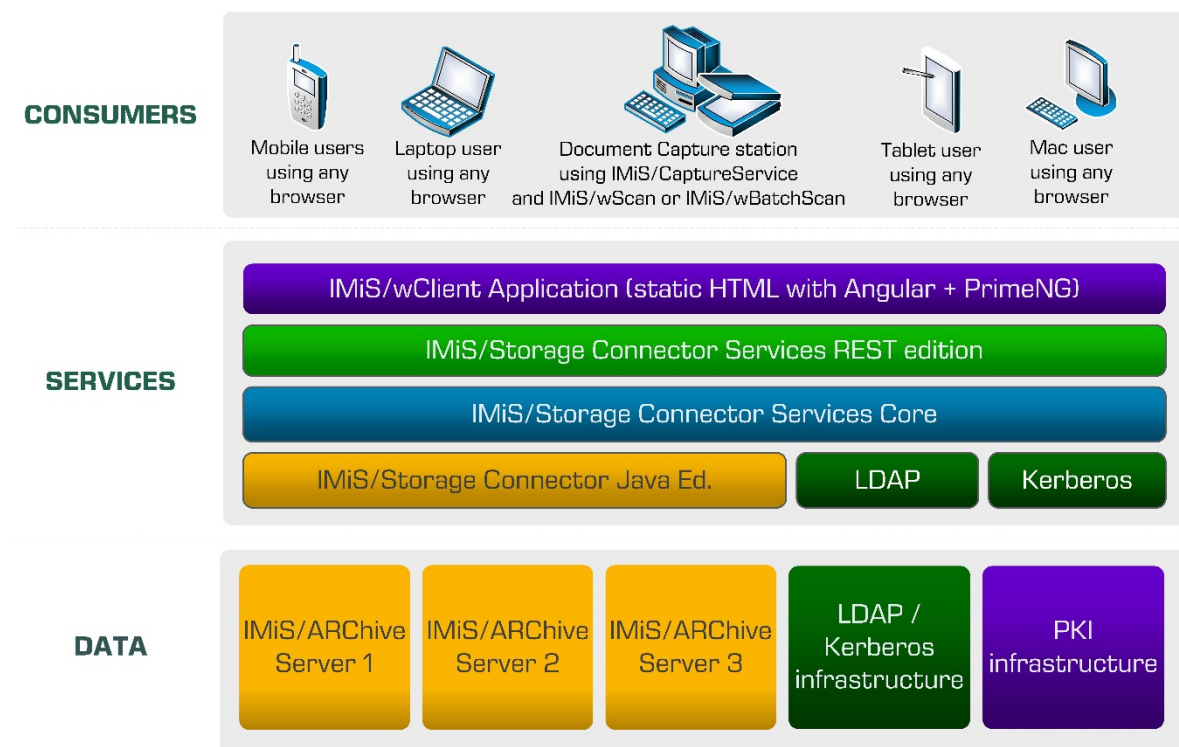


Image 1: Client architecture

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 third 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

Commentary:	<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.				
XMLScheme type:	none	Reference:	ACL	MOREQ2 code:	/

/<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.

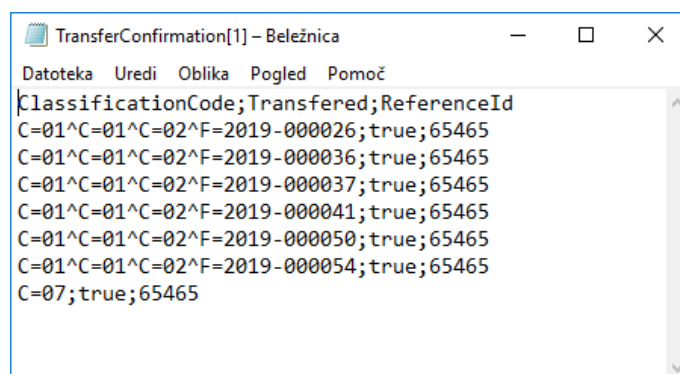


Image 5: Example of a confirmation file after transfer

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.

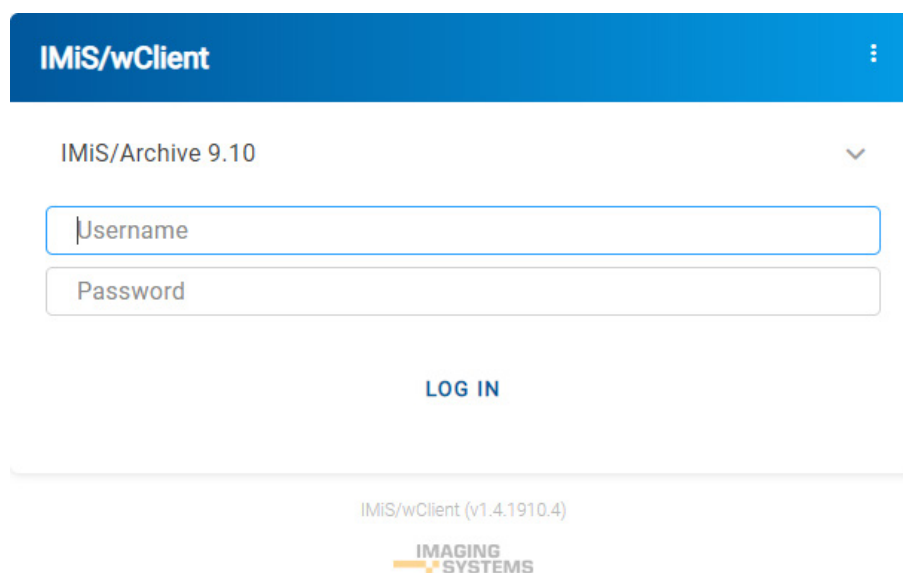


Image 6: Login on archive

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.

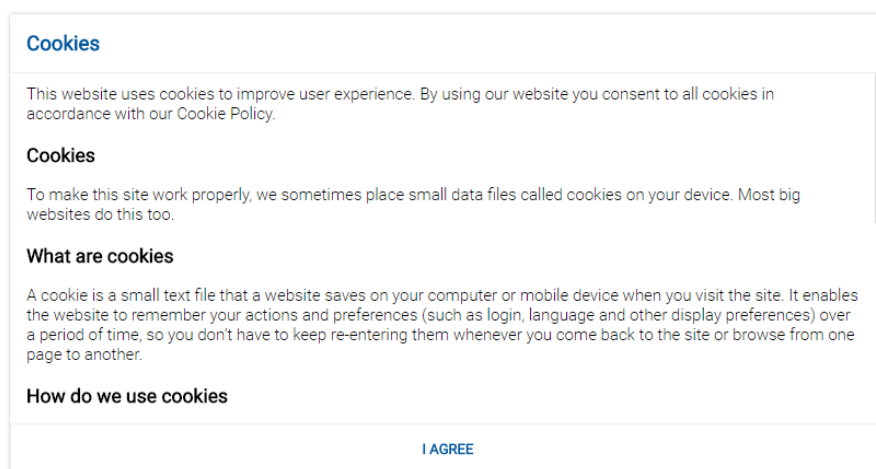



Image 7: Cookie Policy

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 Imaging Systems Inc., the language selection can be expanded as desired.

The languages currently supported are:

- English
- Slovene.

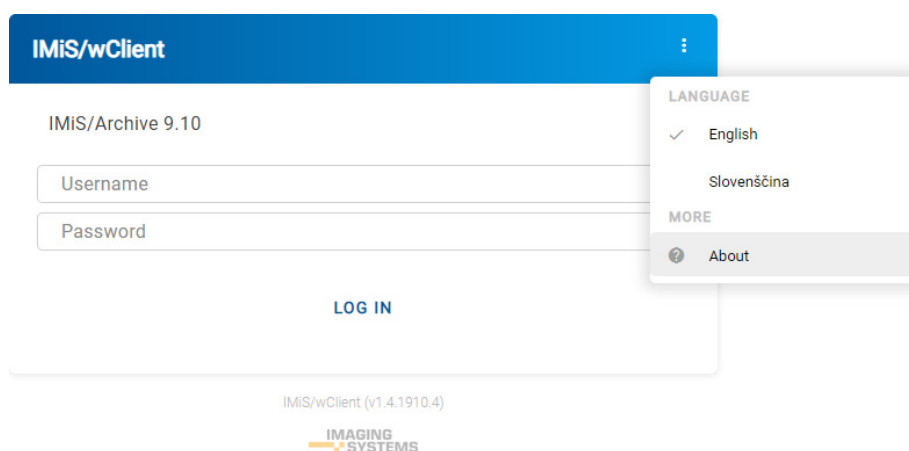


Image 8: Language selection

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.

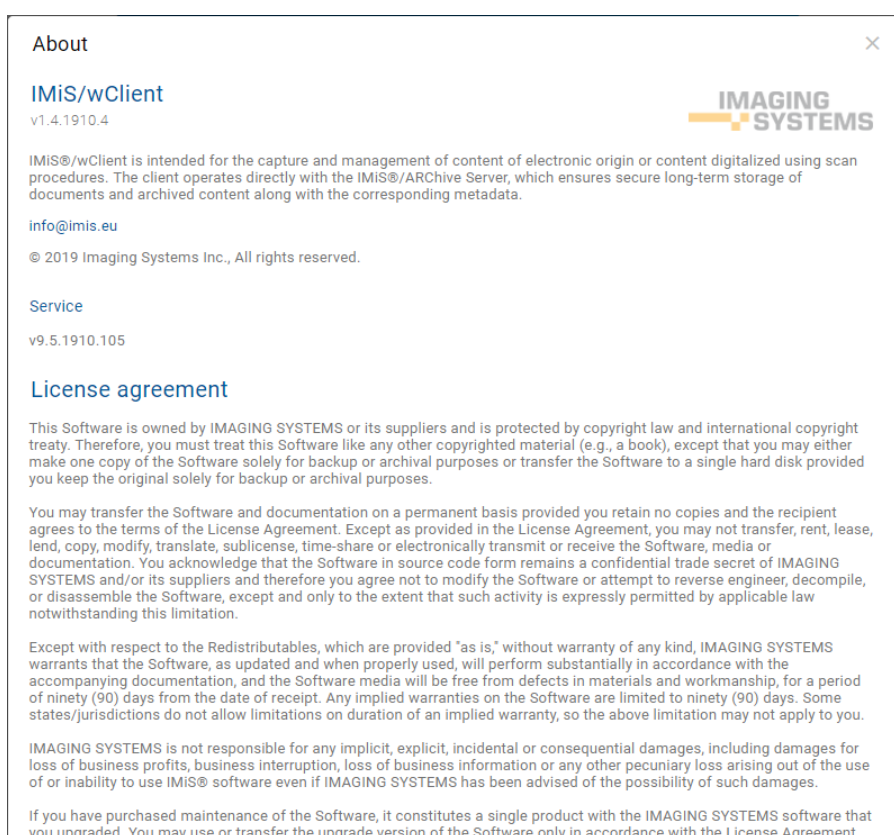


Image 9: About dialog box

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.

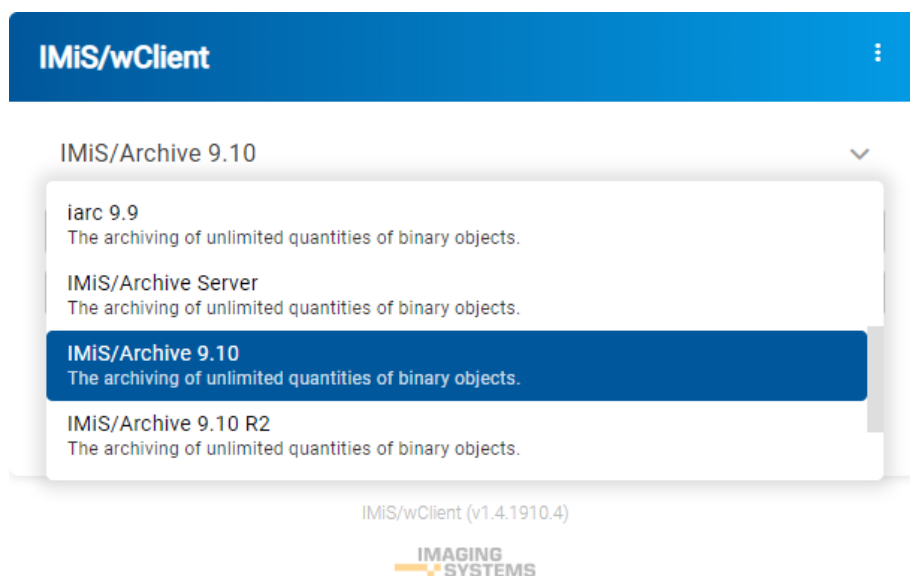


Image 10: A list of available archives

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 user enters his username in the field »Username« and his password in the field »Password«. The user confirms login with the »Log in« button.

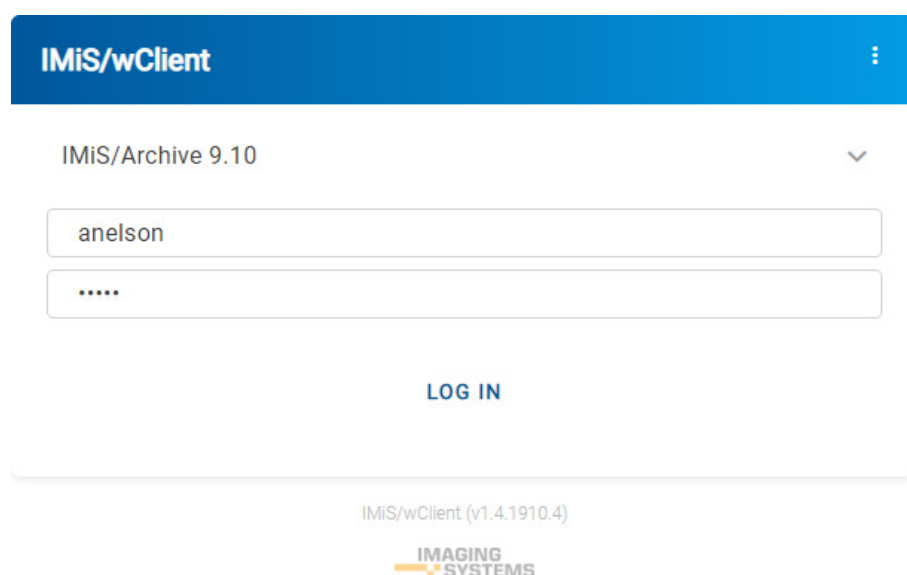


Image 11: Logging into the archive

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.

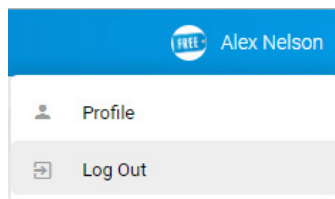


Image 12: Log out of the archive

4.2 Interface description

The user interface of the IMiS®/wClient is designed in accordance with contemporary design trends. It has preserved the concept of displaying the key data on the archive records, following the example of the desktop client IMiS®/Client.

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.

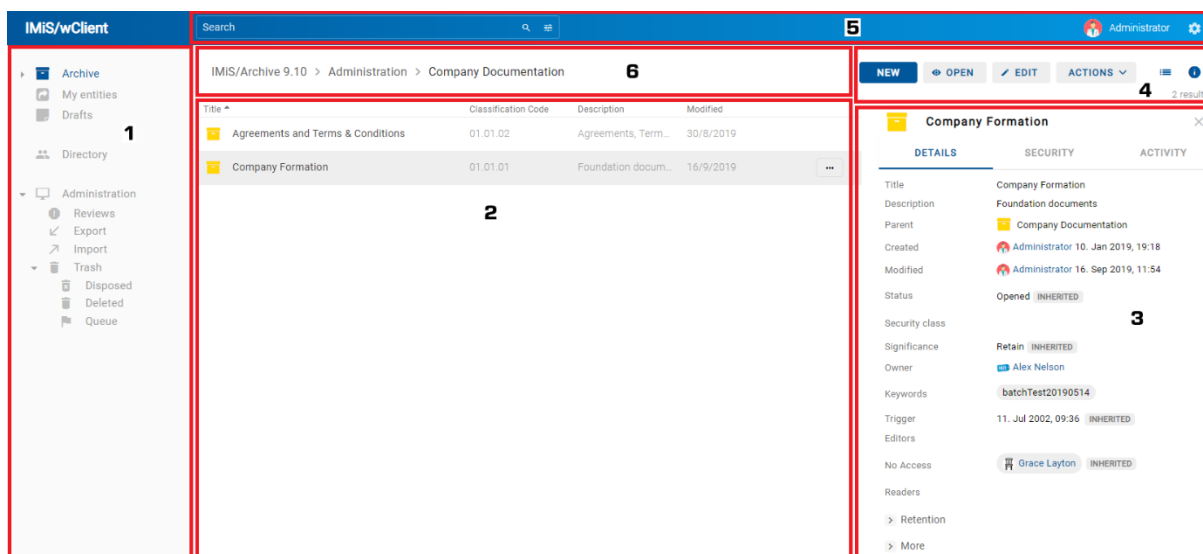


Image 13: User interface of the IMiS®/wClient

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](#).

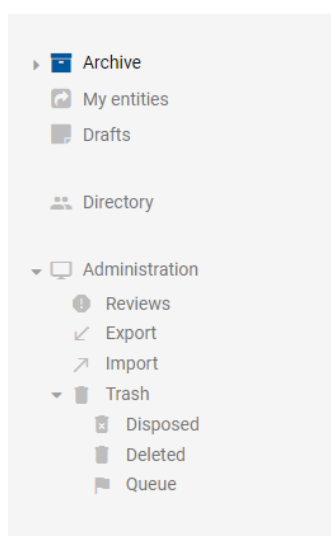


Image 14: Categories in the left view

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.*

IMiS/Archive 9.10 > Documents






Title	Classification Code	Description	Modified ▼
 Certificates	22.05		6/5/2019
 Founding documents	22-2019-000003		6/5/2019
 Correspondence	22-2019-000001		6/5/2019
 Legal matters	22-2019-000002		6/5/2019
 Agreements	22/000004	The list of the a...	6/5/2019

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. If the user has also selected the »Classification code«, »Description« and »Modified« in the settings, the view also shows information on the selected entity.

More on the central view in the chapter [List of entities](#).

***Note:** When displaying a greater number of entities (10,000+), loading all the entities simultaneously would greatly slow down the client. That is why the user can load (directory) entities by pages. When the user reaches the end of the list of entities using the slider, new (directory) entities are added to the end of the list.*

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.

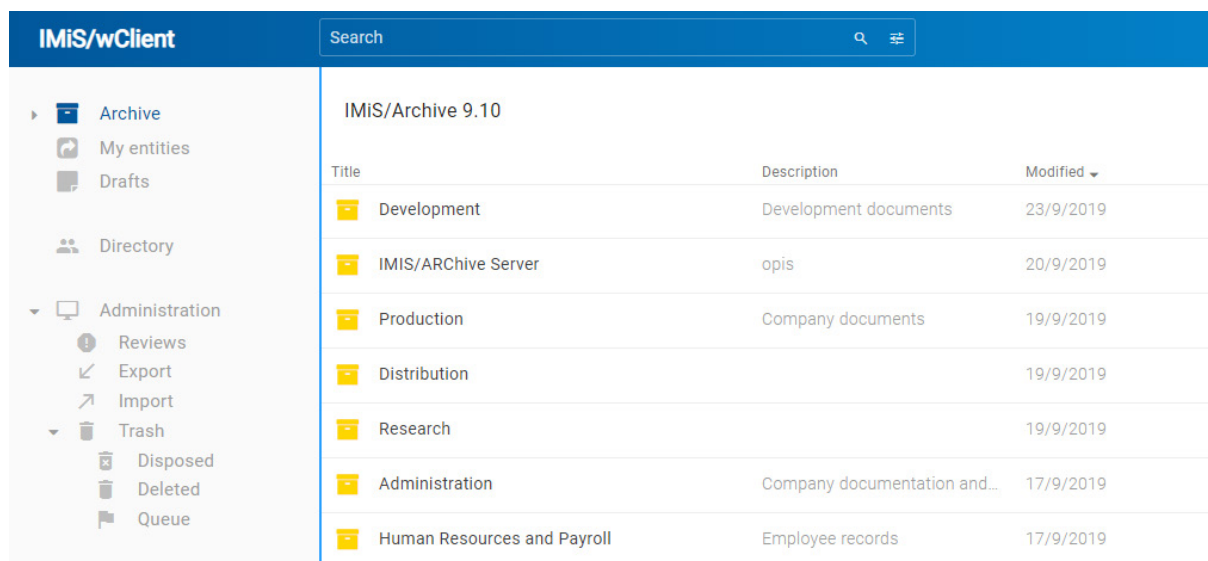


Image 16: Movable dividing line between the left and central view

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](#).

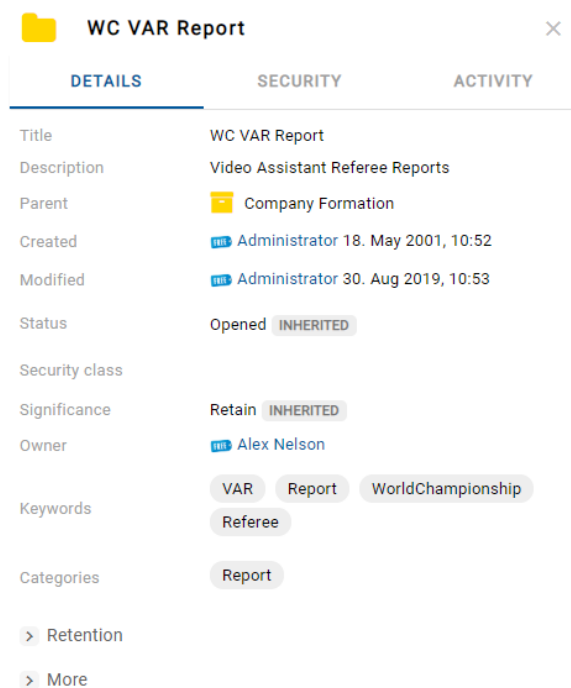


Image 17: Entity information

Note:

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

The command bar (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 (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](#).

- Information on the user's profile and the program module.

For more information see chapter [Menu functions](#).



Image 19: Header of the user interface

To enable quicker access to 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. It enables quick access to the parent entities.

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

Image 20: 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.

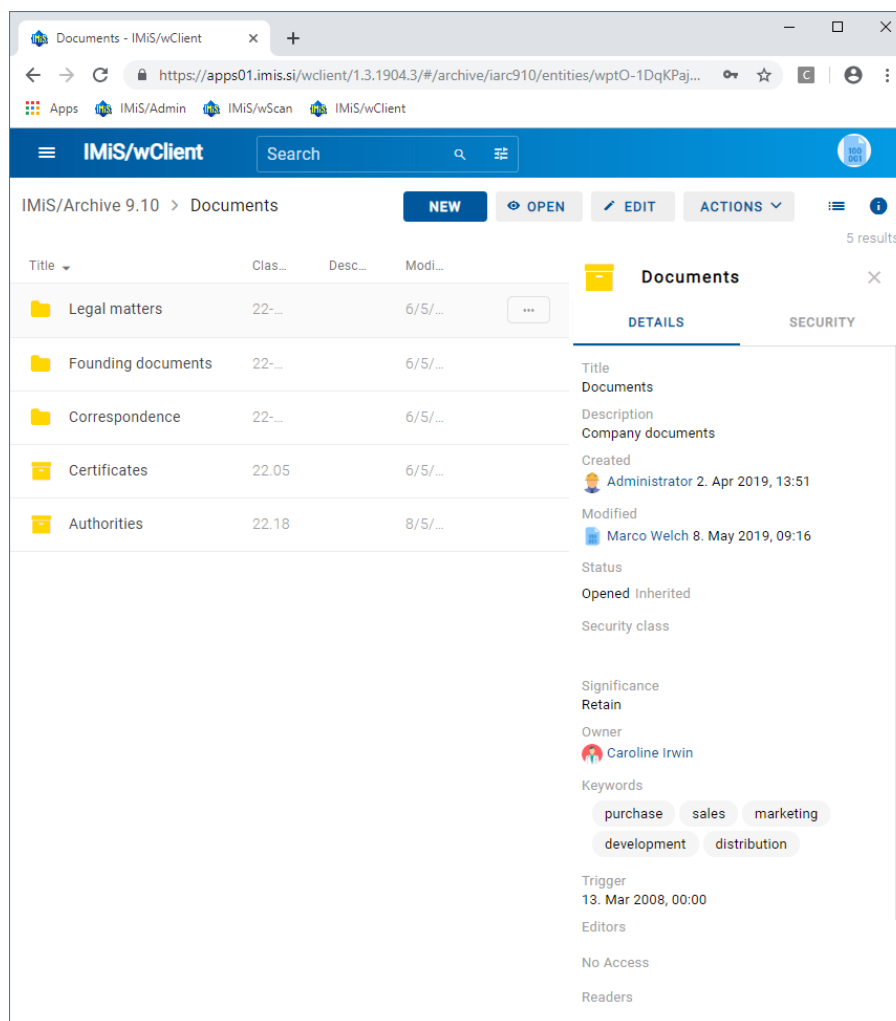



Image 21: Narrowing the user interface display

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 .

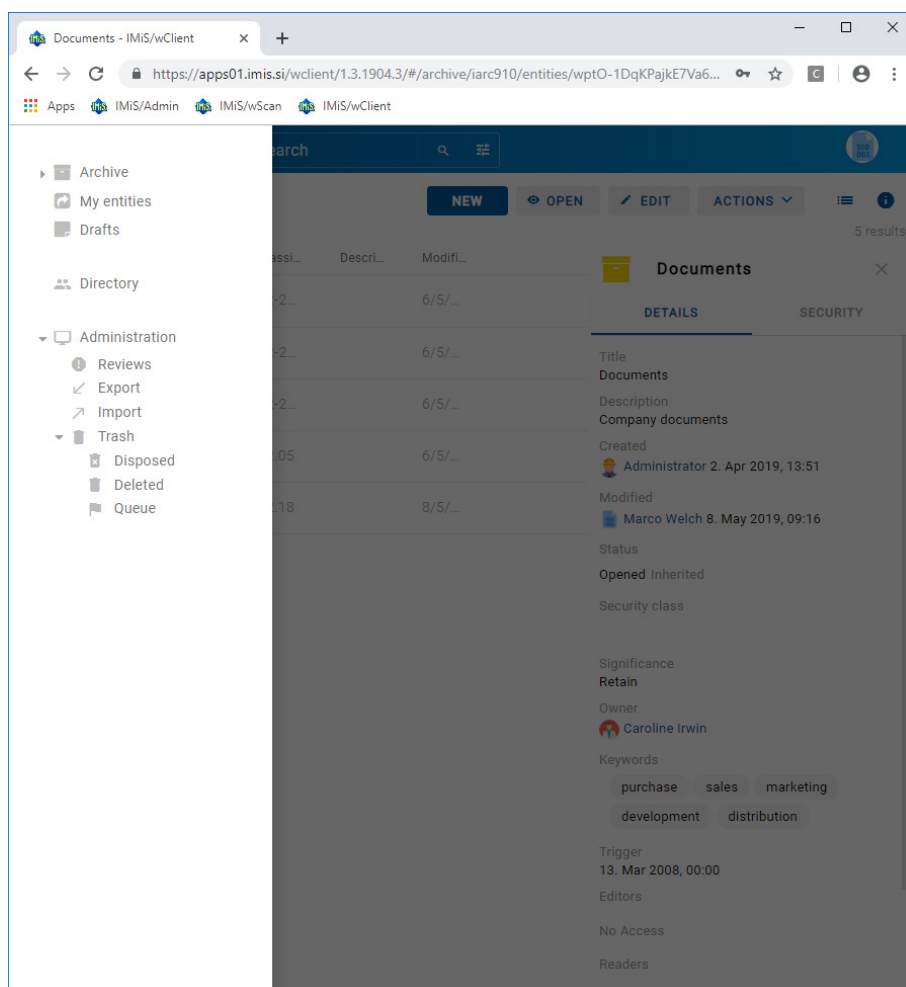


Image 22: Access to folders in the left view via the menu

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.

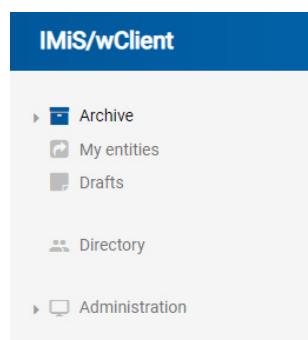


Image 23: Display of folders in the left view of the web client IMiS®/wClient

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.

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.

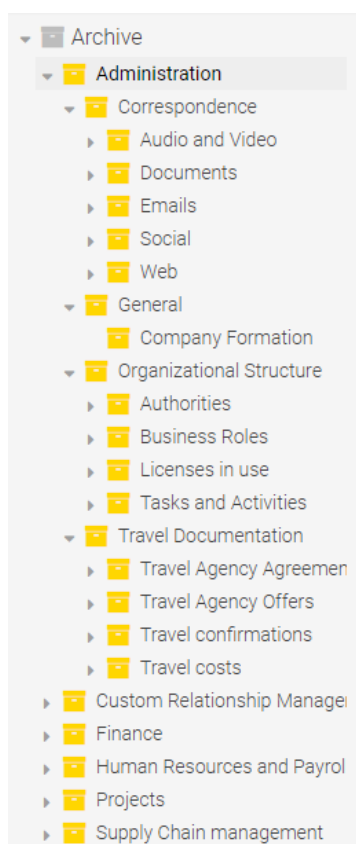


Image 24: The tree view of the classification scheme in the »Archive« folder

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.

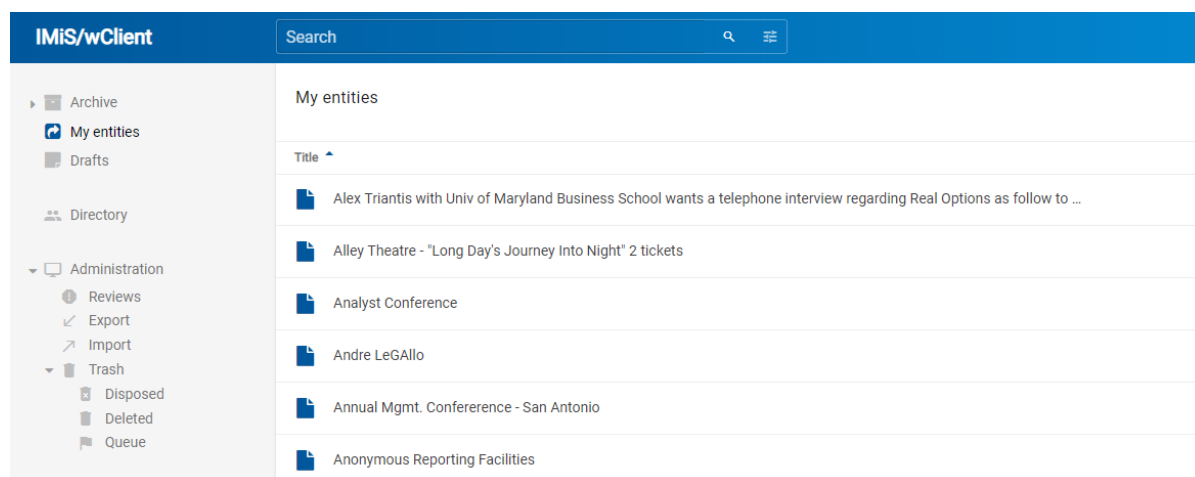


Image 25: Selecting the entity in the »My entities« folder in the central view

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.

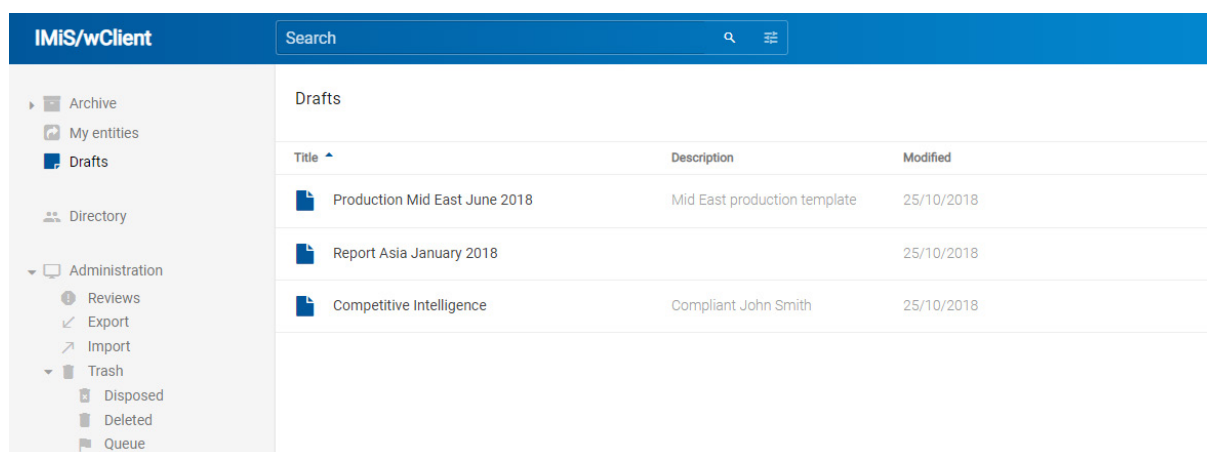


Image 26: Selecting the »Drafts« folder in the left view

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.

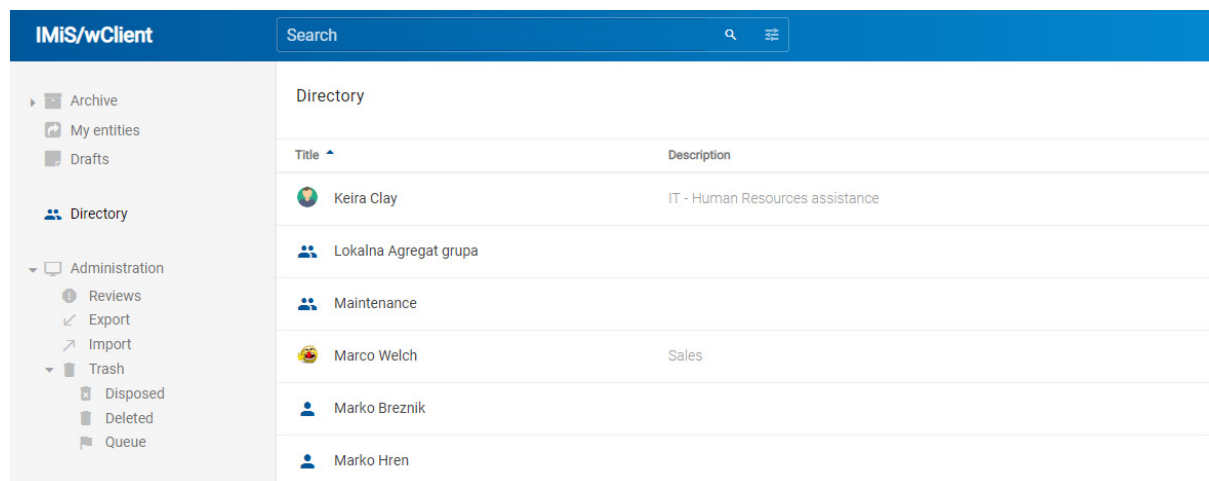


Image 27: The »Directory« folder in the left view

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.

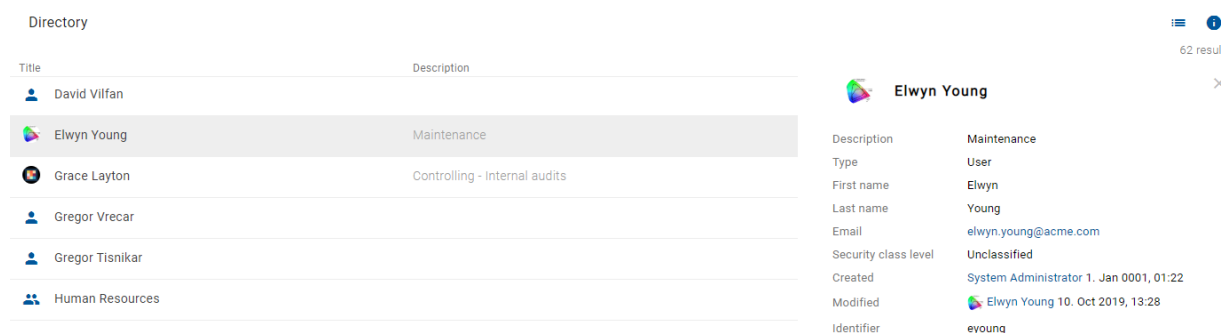


Image 28: User data

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 of the contained entities.

The order of the shown attributes is predefined and is as follows:

1. Title
2. Classification code
3. Description
4. Modified.

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 29: A list of contained entities of the selected entity

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

IMIS/Archive Server > Legacy

Title	Classification Code	Description
 Entity collection is too large to be displayed automatically.		

NEW **ACTIONS**


0 results


Legacy kontejner

DETAILS **SECURITY** **ACTIVITY**

Title: Legacy kontejner

Description:

Parent:  dev-saso1

Created:  Administrator 24. Nov 2015, 10:23

Modified: 24. Nov 2015, 11:11

Status: Opened **INHERITED**

Security class:

Significance:

Owner:

Keywords:

acl:Editors:

acl:Readers:

> Retention

> More

Image 30: 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. For more information on limiting the set of attributes for a search, see chapter [Full text search](#).

Image 31: Limiting the set of entities displayed on the list with a search

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

The user can add or remove the columns of the selected attribute »Classification code«, »Description« and »Modified« with the icon  in the command bar. 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 > Supply Chain management








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

Image 32: 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.

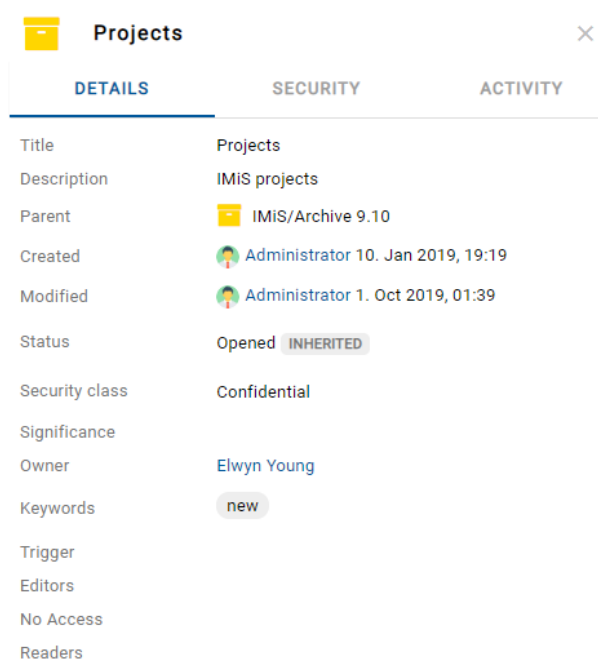


Image 33: Tabs containing entity information in the reading mode

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 see chapter [General system attributes](#).

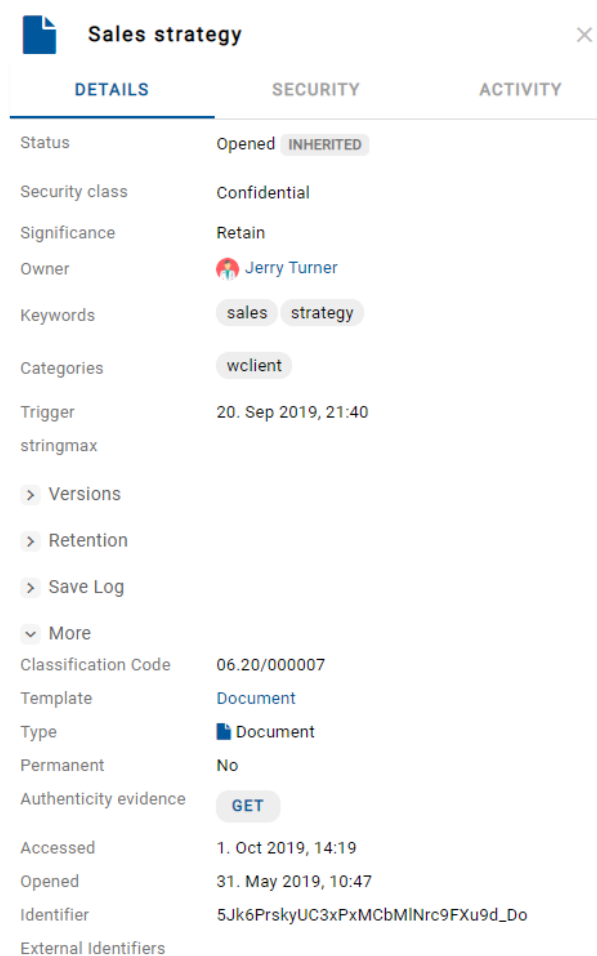


Image 34: The »Details« tab in the reading mode

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.

Custom document

DETAILS SECURITY ACTIVITY

Title	Custom document
Description	Document with custom attributes
Created	Administrator 19. Oct 2018, 08:58
Modified	23. Oct 2018, 14:50
Status	Opened Inherited
Security class	Unclassified Inherited
Significance	Retain Inherited
Owner	Grace Layton
Keywords	
Categories	
Review date	1. Jan 2019
User note	Related to 10 years review procedure

> Retention

> More

Image 35: Custom metadata in the reading mode

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

Custom document

DETAILS PHYSICAL PROPERTIES SECURITY RETENTION

Title*
Mandatory value for naming entity

Description

Significance

Owner

Keywords

Categories

Content

Drag and drop files or click

67.1 kB

External Identifiers

Review date
Expected review date

User note
User can specify some notes

SAVE **CANCEL**

Image 36: »Custom« metadata in edit mode

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

The screenshot shows a 'Create Document' dialog box with four tabs: DETAILS, PHYSICAL PROPERTIES, SECURITY, and RETENTION. The DETAILS tab is active. It contains several attribute groups, each with a label, a list of values, and a '+' icon to add more values. The attributes and their values are:

- binary**: AXNOP.JPG, AIP.XML, ICON_SAMPLE_1.PNG
- bool**: (empty checkbox)
- Date**: 20. September 2019, 13. October 2019
- Date time**: (empty field)
- decimal10**: 0.99887766, 1.22334455, 2.33445566
- double**: (empty field)
- int128**: 7485896896, 2456778893
- attr.string20**: Monday, Tuesday

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

Image 37: Specifying multi-value attributes

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](#).

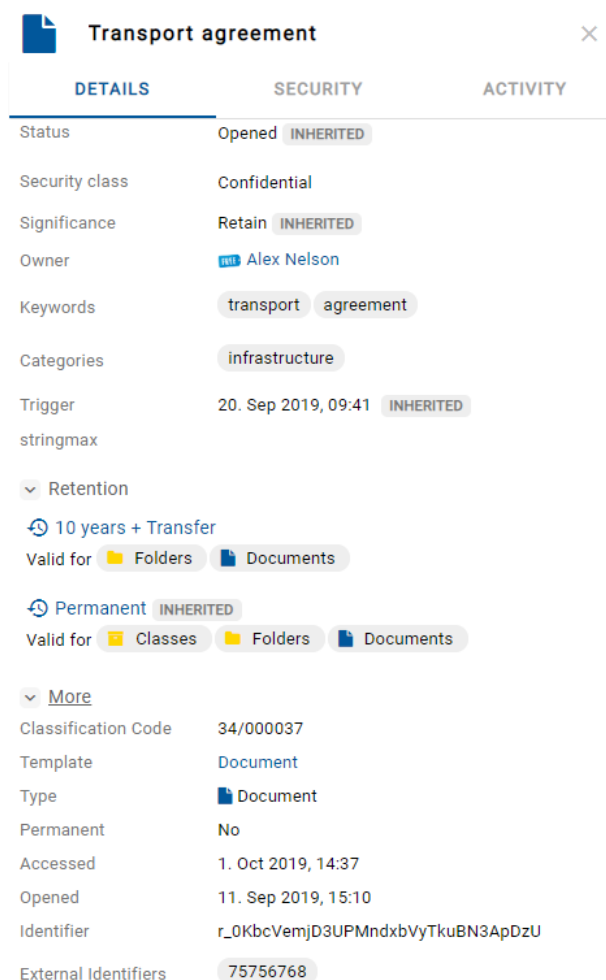


Image 38: The »Details« tab in reading mode

4.2.3.1.4 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.

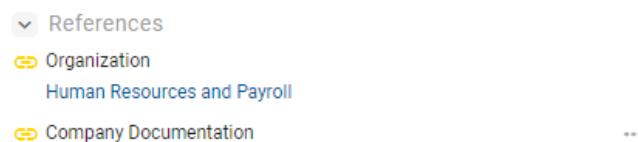


Image 39: References in the »Details« tab

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

4.2.3.1.5 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](#).

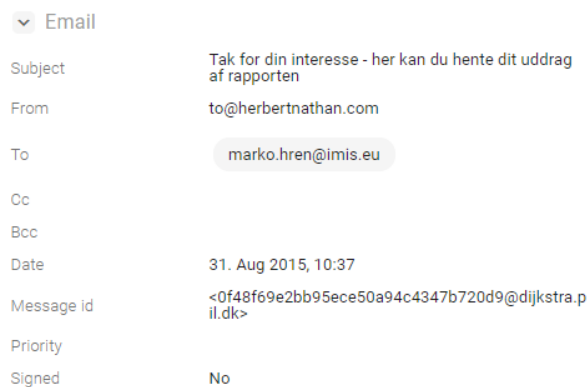


Image 40: Email data in the reading mode

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

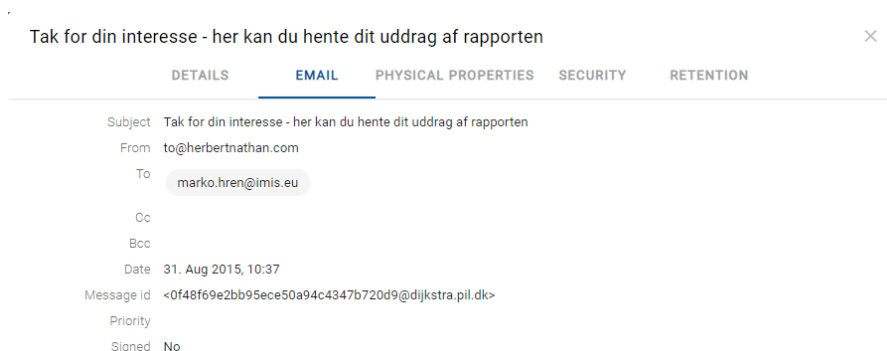


Image 41: Email data in the editing mode

4.2.3.1.6 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 42: 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

ID435

Description

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

Status

CheckedOut

Status change 26. Sep 2018, 11:47

Home location

Brnčičeva 41G

Current location

Dunajska cesta 56

Custodian

Alex Nelson

Return due

09/28/2018

Image 43: Physical content data in the editing mode

4.2.3.1.7 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 arrow in front of the »Save log« closed set.

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

▼ Save Log

```
<?xml version="1.0"?>
<iarc:commitlog xmlns:iarc="http://www.imis.si/imisarc/com
=====
Verifying Go-To-Market report.pdf [bcee4e037007d8e95c9fbb6
Signature status: VALID
Signing certificate subject: '/C=SI/ST=Slovenija/OU=indivi
Signing certificate issuer: '/C=SI/O=Republika Slovenija/
Valid from: '2017-09-28T13:03:03Z'
Valid to: '2022-09-28T13:33:03Z'
=====
Digital signature verification ended: 2018-10-19T07:32:04.
MIIEijCCAvKgAwIBAgINAJCud3YAAAAAVx3QbzANBgkqhkiG9w0BAQsFAI
CQYDVQQGEwJTSTEcMBoGA1UEChMTUmVwdWJsaWthIFNsb3Zlbn1qYTEXME
YRMOVkfFUU0ktMTc2NTk5NTcxZjAUBGNVBAMTDVNJLVRSVVNUIFJvb3QwHk
NDI1MDczODE3WhcNMzcwMjI1MDgwODE3WjBcMQswCQYDVQQGEwJTSTEcME
ChMTUmVwdWJsaWthIFNsb3Zlbn1qYTEXMBUGA1UEYRMOVkfFUU0ktMTc2NT
FjAUBGNVBAMTDVNJLVRSVVNUIFJvb3QwggGiMA0GC5qGS5Ib3DQEBQUAA4
ggGKAoIBgQDTy5wtuAwQ2Ux3P9LsDjZqVPXNdHbt0uTtHKN8cuV0lMrd
PgIG3a9wFaGqzxGHimZ7y8wdcERCj6zK5NbJ7SNo44Qv25UdAhwiPoyS
IN1L6KwEdaWY1YKLG+EgJAdGqwx1NkBni3XuqdmRKRvtby1FwtbiYAGx86
P4W+CPZTK3uiyUwhRIGAZppgOhvEvgzMMBB/ETY4SuaboZZTnJTMEcYETk
4a+MHDX8uZM33/1dPdZrDSdsRMLZZiTwb/8EG/f1acNdwXj+vaFZZC+in2
PHxyJSeYLj4yd1Ndb2rsCJhWAE3KKYgnS5gXPuQvEZDuP5t2MBmIiRrNH
W01IO05MvQF7bj5A6tHCCkKTZ8MmLz8HW8+v4x3o0uJ14YSRP/VmAP2qM6
```

Image 44: A report on checking the validity of electronic signatures and digital certificates

4.2.3.1.8 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.

▼ Retention

II Legacy procedure

↻ 10 years + Transfer

Valid for  Folders  Documents

↻ Permanent **INHERITED**




Valid for  Classes  Folders  Documents

Image 45: 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.

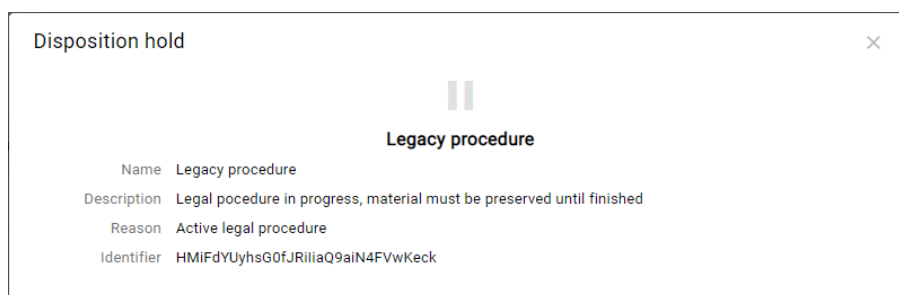


Image 46: Information on disposition hold

By clicking on the »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.

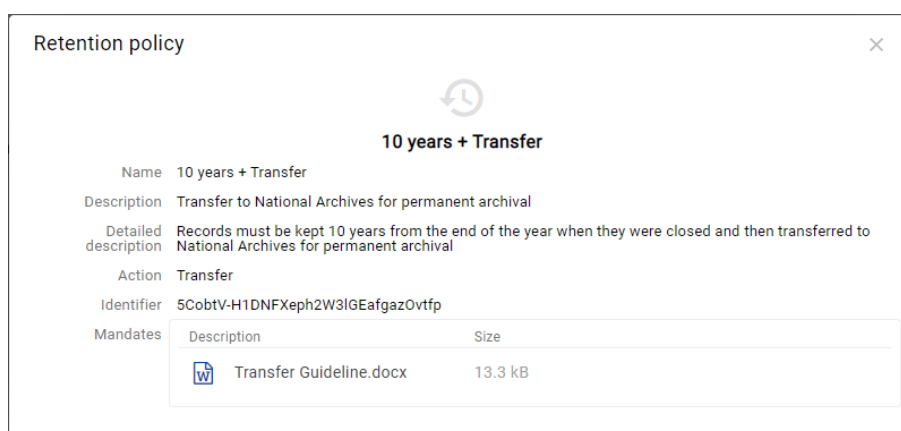


Image 47: Retention policy information

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.

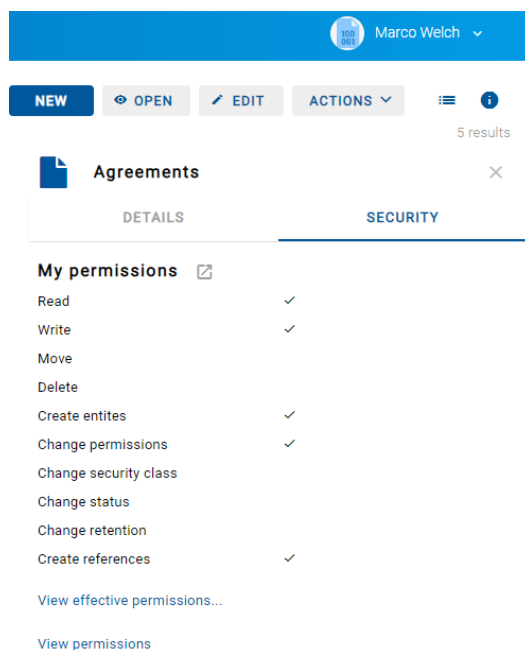


Image 48: The »Security« tab for a logged user in the preview mode

By selecting »View effective permissions« below the list of access permissions, a dialog box shows the current status of »Effective permissions« for the selected entity and the logged user.

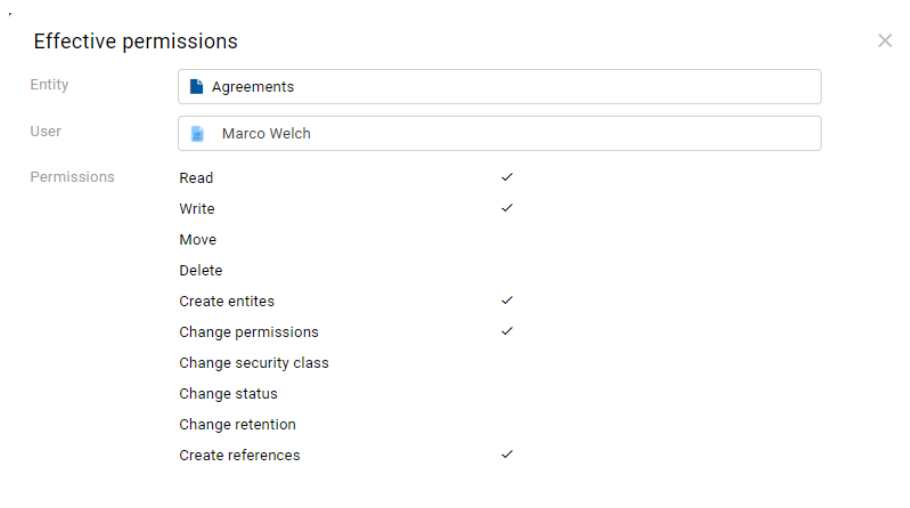


Image 49: A list of effective permissions for the logged user in the preview and reading mode

In the reading mode the user is shown a list of all users or groups that have been granted at least one explicit permission on the selected entity in the access control list (ACL).

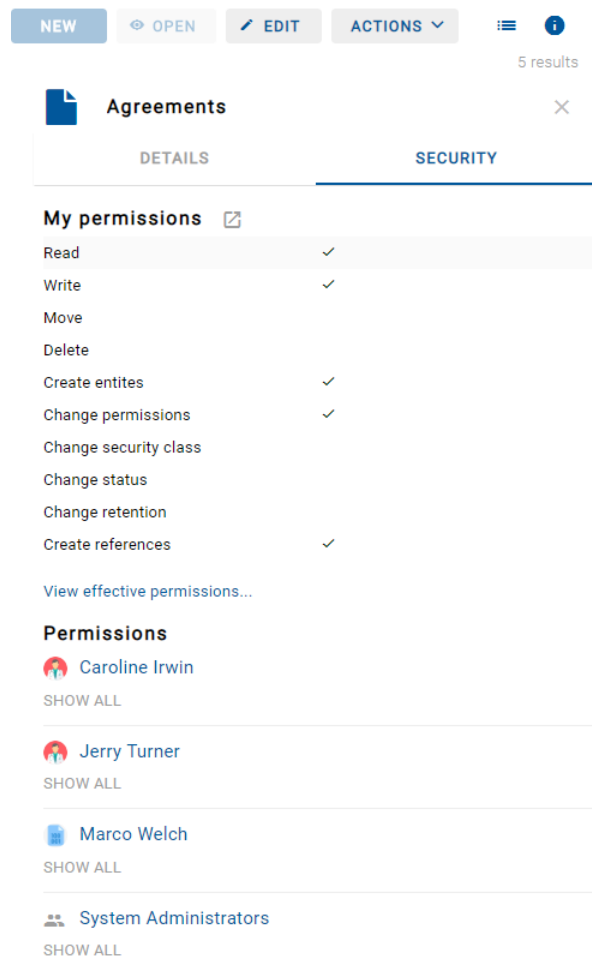


Image 50: A list of users/groups with access rights to the entity in the reading mode

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.

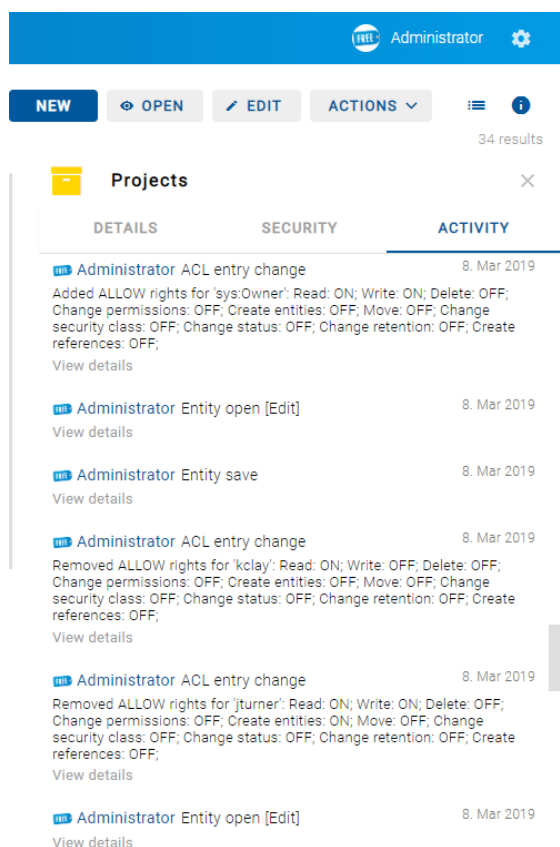


Image 51: The »Activity« tab in the preview and reading mode

The audit log records the following information:

- User: 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: type of event that was performed on the selected entity.

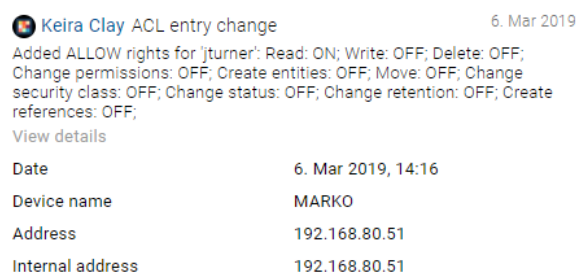


Image 52: Information about the user who performed an action on the entity

- **Date:** time when an action was performed on the selected entity.
- **Device name:** 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. When a format is chosen, a dialog box appears enabling the user to save 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.
 - **»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](#).
 - **»Authenticity evidence«:** retrieves authenticity evidence for 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.

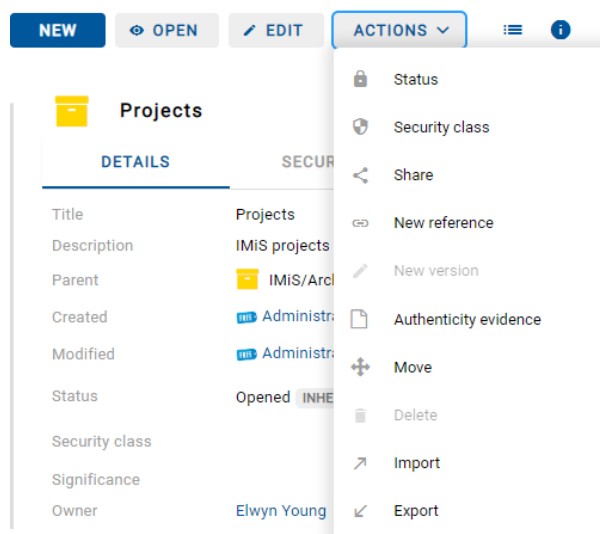


Image 53: Command bar above the information of the selected entity

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 54: Omogočanje/onemogočanje prikaza podatkov o entiteti

4.2.5 Menu functions

4.2.5.1 User and application information

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

- Profile: information about the user.
- 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.

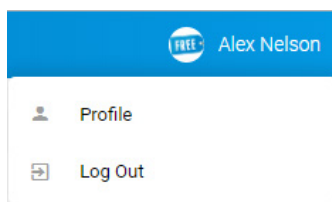


Image 55: Popup menu in the header of the user interface

4.2.5.1.1 User information

By selecting on »Profile«, a dialog window opens, showing the following details in the section »Profile« and the settings in the section »Settings«:

- Description: a short description of the user.
- Type: type of user (user, group).
- 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.
- Created: the date and time of creating the directory entity.
- Modified: the date and time of the last change to the directory entity.
- Identifier: the unique identifier of the user.

ACTIONS ▾

FREE Alex Nelson

Description

Type

First name

Last name

Email

Security class level **Restricted**

Created **System Administrator 1. Jan 0001, 01:22**

Modified **Alex Nelson 11. Oct 2019, 10:56**

Identifier **anelson**

SAVE **CANCEL**

Image 56: Display of the window with user details

In the section »Settings« the user sets the parameter »Display reason dialog«. That enables the display of the dialog box for entering the reason for performing the action. By checking the parameter, 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).

Reason ☒ Display reason dialog

Image 57: Notification window for entering the reason for performing the action

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 58: Dialog box for disabling the entry of the reason for performing actions

By clicking on the »Actions« button in the top right of the window, the following options are available to the user in the popup menu:

- 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.
 - Change password: changing the existing user password with a new one.
- The user confirms the change of password with the »Change password« button.

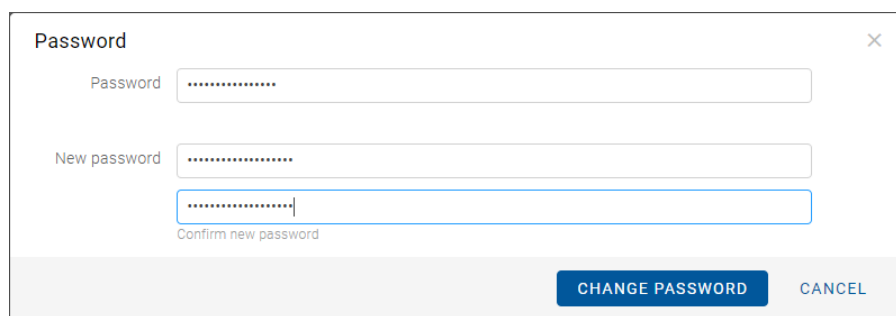



Image 59: Display of the window for changing the user password

4.2.5.1.2 Log out

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](#).

4.2.5.2 Information about audit log events and application

By selecting the icon  next to the user's name, the following actions are available in the popup menu:

- Activity: information about audit log events for the selected user and entity.
- About: information about the application and licensing terms.


4.2.5.2.1 Activity

More information on the »Activity« action is available to the user in the chapter [Searching audit log events](#).

4.2.5.2.2 About

More information on the »About« command is available to the user in the chapter [About](#).

4.2.5.3 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.

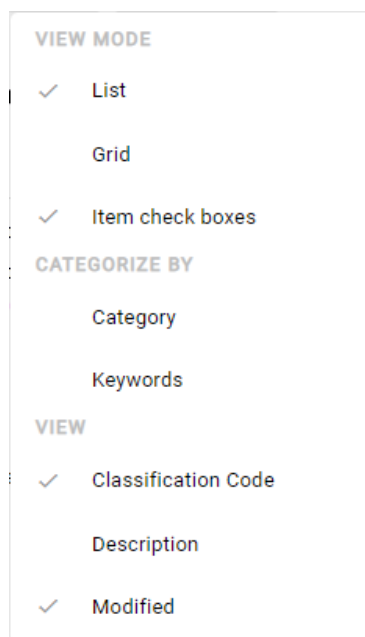


Image 60: Setting the display of entities

4.2.5.3.1 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.

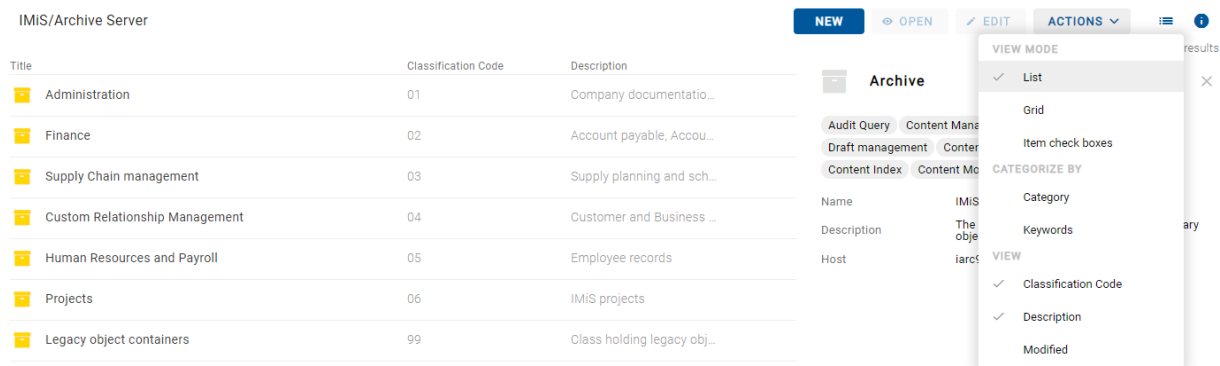


Image 61: Entities shown on a list

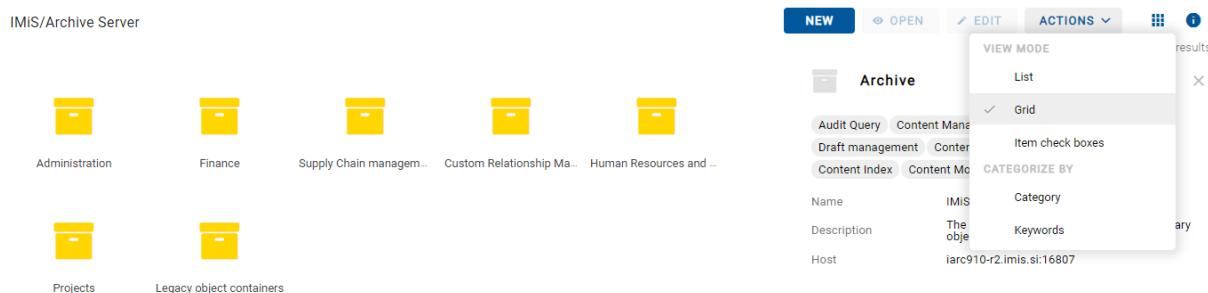


Image 62: Entities shown in a grid

By selecting the option »Item check boxes« in the menu, the user can mark the entities which will be moved or deleted in the next step.

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

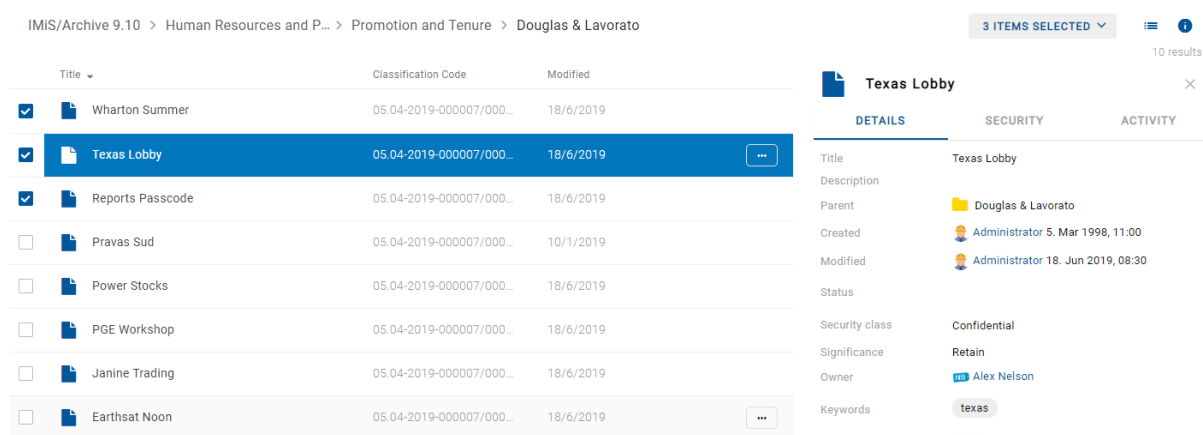


Image 63: Selecting entities for performing actions

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

- »Move«
- »Delete«.
- »Deselect all«.

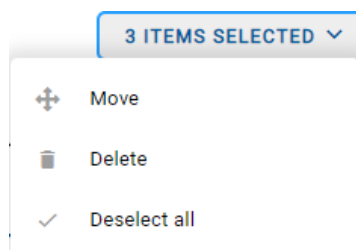


Image 64: Set of actions on selected entities

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](#).

4.2.5.3.2 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.

9 results

Video storm event X

DETAILS SECURITY ACTIVITY

Title	Video storm event
Description	Next generation video storm event
Parent	Audio Video
Created	Administrator 2. Jul 2019, 08:46
Modified	Administrator 30. Aug 2019, 13:46
Status	Opened
Security class	Confidential
Significance	Retain
Owner	Alex Nelson
Keywords	video event
Categories	audio/video
Trigger	2. Jul 2019, 16:16 INHERITED
stringmax	

> Versions

> Retention

> More

Image 65: 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.

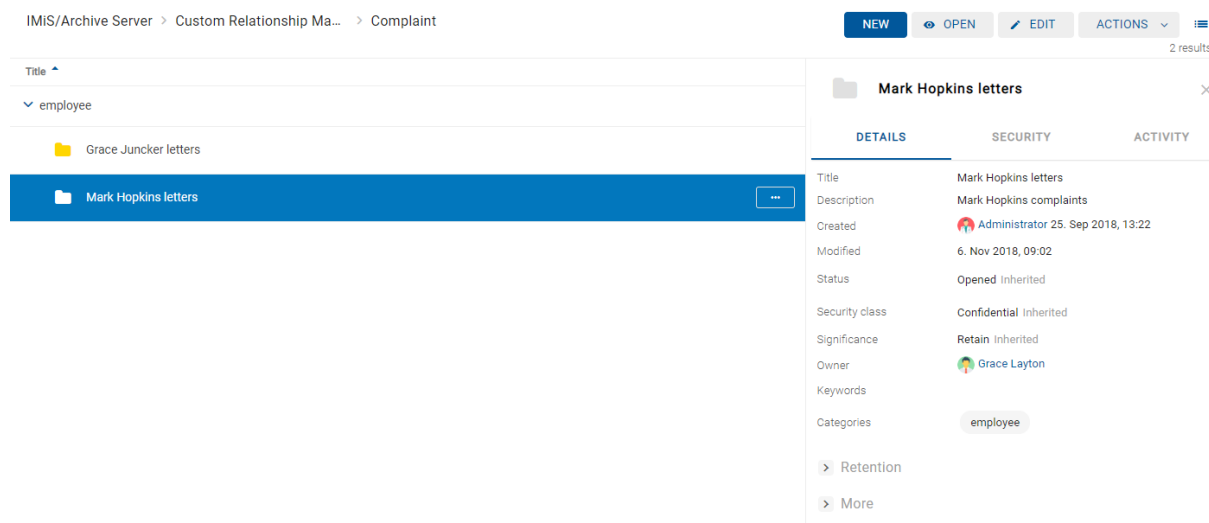


Image 66: A categorized »Categories« view

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.

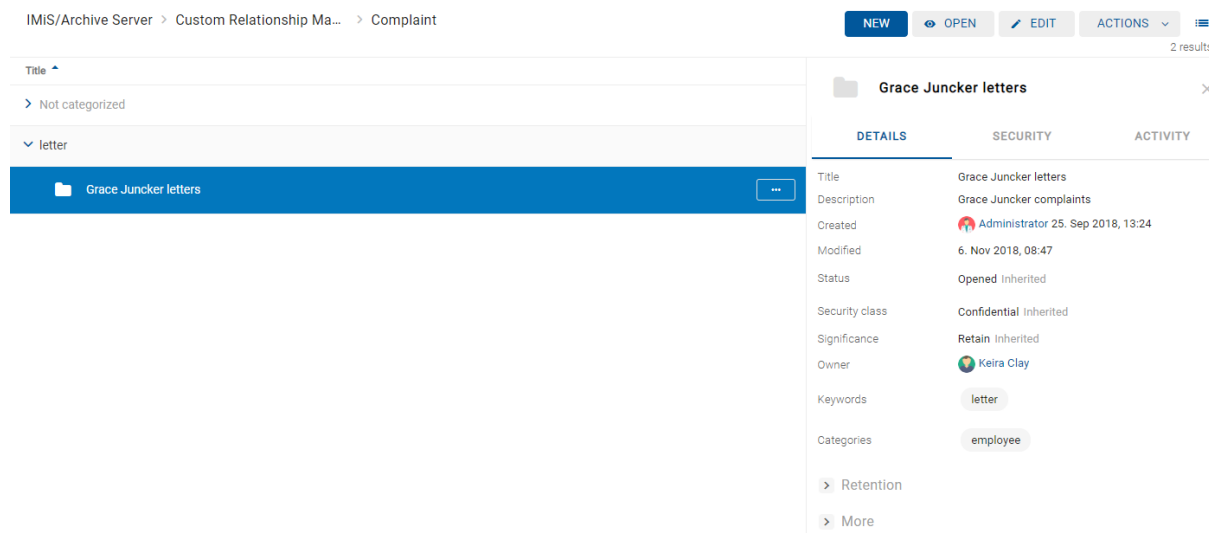
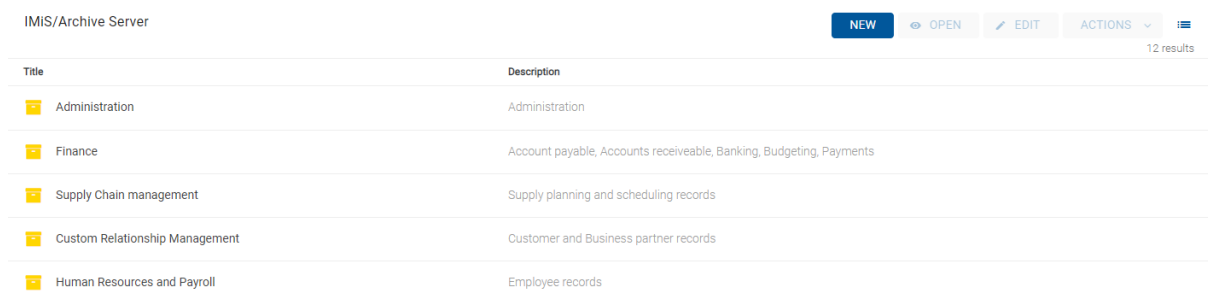


Image 67: A categorized »Keywords« view

4.2.5.3.3 View

In the »View« set the user defines which columns of the selected attributes will be displayed in the central view. The user can add or remove the following columns of the selected attributes:

- Classification code
- Description
- Modified.



IMiS/Archive Server		NEW OPEN EDIT ACTIONS 12 results	
Title	Description		
Administration	Administration		
Finance	Account payable, Accounts receivable, Banking, Budgeting, Payments		
Supply Chain management	Supply planning and scheduling records		
Custom Relationship Management	Customer and Business partner records		
Human Resources and Payroll	Employee records		

Image 68: Display of the columns of the selected attributes of »Title« and »Description«

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 69: 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, entering the values of attributes, defining the retention policy and confirming »Create«.

Create Class

DETAILS SECURITY RETENTION

Parent: root

Template*: Class

Title*:
Mandatory value for naming entity

Description:

Status: Inherited

Security class: Inherited

Significance: Inherited

Owner: Caroline Irwin

Keywords: production ✕
Important words used in entity

External Identifiers:
Custom external entity identifiers

Classification Code Generated: Automatic

CREATE **CANCEL**

Image 70: 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, same as when creating a root class.

IMIS/Archive 9.10 > Administration > Organizational Structure

NEW **OPEN** **EDIT** **ACTIONS** **4 results**

Title	Classification Code	Description	Modified
Class Authorities	01.03.01	A person or organization having p...	18/9/2019
Class Business Roles	01.03.02	A group of related skills with a lev...	18/9/2019
Class Tasks and Activities	01.03.03	A task is an activity or piece of wo...	18/9/2019
Class Licenses in use	01.03.04	Number of licenses that gives you...	18/9/2019

Image 71: 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.
- 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.

Create Document

DETAILS

PHYSICAL PROPERTIES

SECURITY

RETENTION

Mandatory value for naming entity

Description

Development strategies, documents, notes

Status

Opened

INHERITED

Security class

Confidential

INHERITED

Significance

INHERITED

Owner

Alex Nelson

Keywords

development strategy documents

Important words used in entity

Categories

development

Content

Drag and drop files or click

External Identifiers

5289406

Custom external entity identifiers

No Access

Jerry Turner

Inherited

List of directory entities which have no access to the entity

Reason

Development document creation

CREATE

CANCEL

Image 72: Display of creating a new document with custom attributes

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.

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

Title*

Closing deal #451

Mandatory value for naming entity

Image 73: Entry of required metadata

Attribute entry fields are as follows:

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

Description

Image 74: Entry of text metadata

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

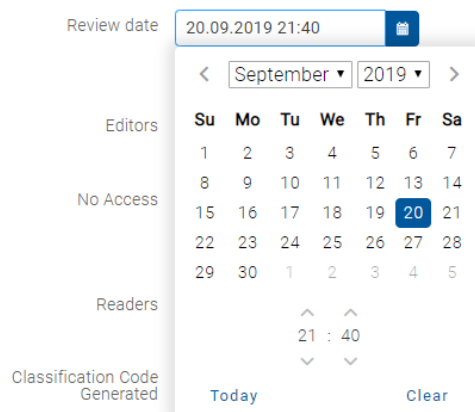


Image 75: Entry of date and time metadata

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.

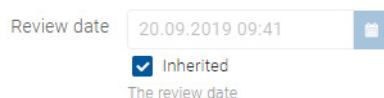


Image 76: Displaying the inherited value of the date field of the parent entity

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

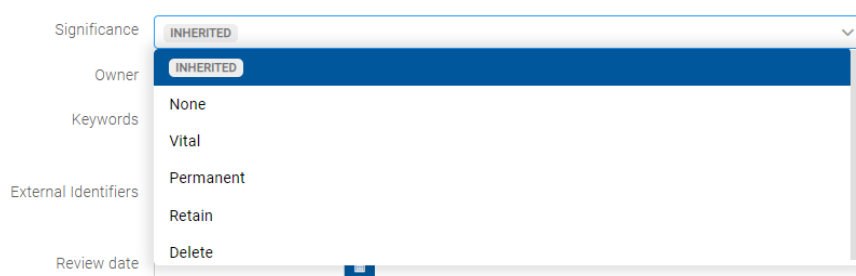


Image 77: Entry of metadata with predefined values

- 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 78: 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 » - «.

Create Document

DETAILS PHYSICAL PROPERTIES SECURITY RETENTION

Editors +

List of directory entities which can modify the entity

binary PDF #1.PDF - PDF #2.PDF - PDF #3.PDF - PDF #4.PDF +

bool ☐ - +

double 100.00 - 10.00 - -10.00 +

attr.label +

time 08:00 - 12:00 - 16:00 +

attr.uint64 +

Reason

CREATE CANCEL

Image 79: 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 » - «.

Create Document

DETAILS PHYSICAL PROPERTIES SECURITY RETENTION

Editors

Alex Nelson -

Jerry Turner -

John Smith -

Keira Clay -

Marco Welch +

List of directory entities which can modify the entity

binary

PDF #1.PDF -

PDF #2.PDF -

PDF #3.PDF -

PDF #4.PDF +

bool ☐ - +

double +

attr:label +

time +

attr:uint64 +

Reason

CREATE CANCEL

Image 80: 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.

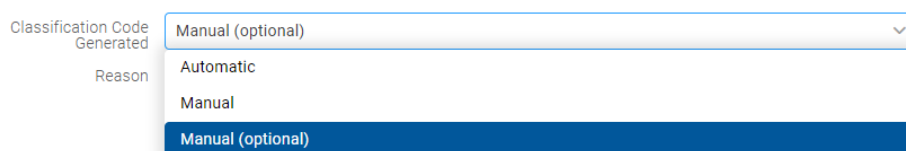


Image 81: Selecting the type of classification code entry for the contained entity

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«.

Create Document

DETAILS

PHYSICAL PROPERTIES

SECURITY

RETENTION

Parent

Manufacturing

Template*

Document

Standalone document entity

Title*

IS-EXP-1000

Mandatory value for naming entity

Description

Export documentation to Angola

Status

Opened

INHERITED

Security class

Confidential

Significance

Retain

Owner

Alex Nelson

Keywords

export document

Important words used in entity

Categories

export

Content

Drag and drop files or click

Export_documentation.pdf429.1 kB

CREATE

CANCEL

Image 82: Manual entry of a child entity's classification code

IMiS/Archive 9.10 > Supply Chain management > Manufacturing

Title	Classification Code	Description	Modified
IS-EXP-1000	03.04/000006	Export documenta...	19/9/2019

Image 83: 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.

Security Class

Significance

Owner

Keywords

External Identifiers

Inherited

Inherited

Unspecified

Top Secret

Secret

Confidential

Restricted

Image 84: 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.

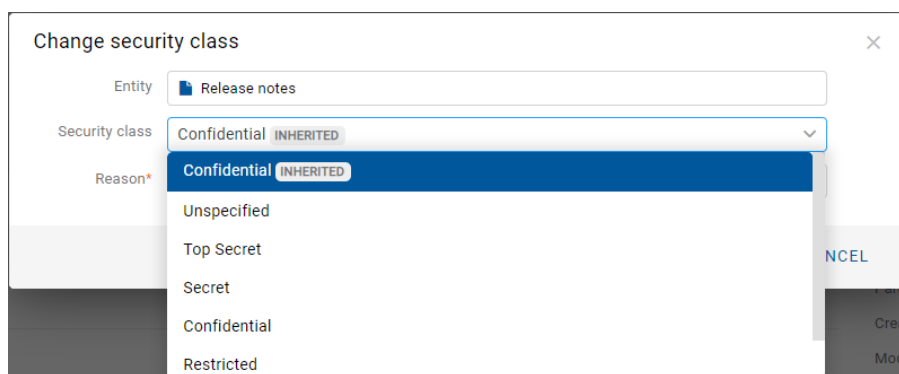


Image 85: Entity information after entering the security class

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«.

Create Document

DETAILS | PHYSICAL PROPERTIES | SECURITY | RETENTION

Parent: wClient project

Template*: Document (Standalone document entity)

Title*: Development strategy (Mandatory value for naming entity)

Description: Total transformation through a right-the-time approach

Status: Opened (INHERITED)

Security class: Opened (INHERITED)

Significance: Opened, Closed

Owner: Alex Nelson

Keywords: development, strategy (Important words used in entity)

Categories: development

Content: Drag and drop files or click

External Identifiers: Custom external entity identifiers

CREATE **CANCEL**

Image 86: 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.

Create Document

DETAILS **PHYSICAL PROPERTIES** SECURITY RETENTION

Identifier: ID534

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

Status: CheckedOut

Home location: Brodway street 1070, Manhattan, New York

Current location: Denver street 500, Denver, Colorado

Custodian: John Cusac

Return due: 31.12.2019

Image 87: 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 »CheckedIn« value.

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

Status: CheckedOut

Status change 19. Sep 2019, 09:06

Image 88: 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.

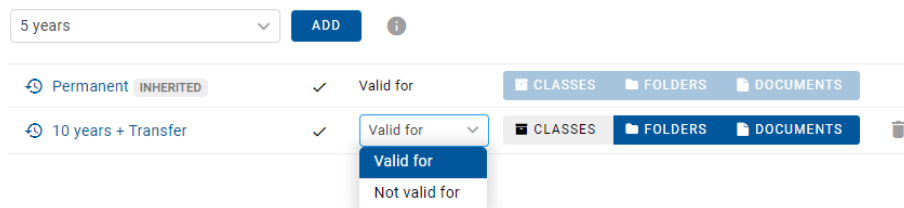


Image 89: Selecting validity for a specific type of entity

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

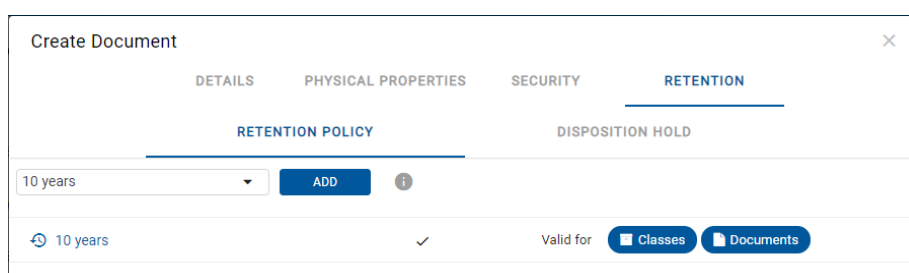


Image 90: Display of the »Retention« tab

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.

Create Document

DETAILS PHYSICAL PROPERTIES SECURITY RETENTION

Parent: Export

Template*: Document

Title*: Product #5127 export to Asia
Mandatory value for naming entity

Classification Code*: IS-EXP-1100
Mandatory entity classification code

Description: Export product #5127 to Asian countries

Status: Opened Inherited

Security class: Restricted Inherited

Significance: Retain Inherited

Owner: Ron Salazar

Keywords: asia

Categories: export

Content: Drag and drop files or click

External Identifiers: Custom external entity identifiers

CREATE **CANCEL**

Image 91: Saving a new or modified 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 92: 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



Image 93: Example creator of entity

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

Created



Image 94: 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 95: 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 96: 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 97: 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 98: Example date and time an entity was closed

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

Identifier Jjgoyu4LBNJkT0HSu9aMalwQt-IYIuzH

Image 99: 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 100: 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.

Development strategy

DETAILS **PHYSICAL PROPERTIES** SECURITY RETENTION

Identifier ID534

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

Status CheckedOut

Home location CheckedIn

Current location CheckedOut

Custodian John Cusack

Return due 31.12.2019

Image 101: 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.

The screenshot shows a dialog box titled 'Development strategy' with a close button (X) in the top right corner. The dialog has four tabs: 'DETAILS', 'PHYSICAL PROPERTIES', 'SECURITY' (selected), and 'RETENTION'. Below the tabs, there is a search bar and an 'ADD' button. To the right of the search bar, there is a 'Permissions' dropdown menu set to 'Entity'. The main area of the dialog is a table with columns 'Permission' and 'Effective'. The table lists various permissions and their status for the selected entity. At the bottom right, there are 'SAVE' and 'CANCEL' buttons.

Permission	Effective
Full access	✓
Read	✓
Write	✓
Move	✓
Delete	✓
Create entities	✓
Change permissions	✓
Change security class	✓
Change status	✓
Change retention	✓
Create references	✓
Options	
Enabled for this	✓
Enabled for subtentities	✓
Delegate Context	✓

Image 102: »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.

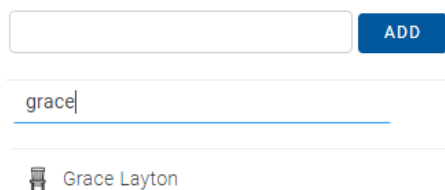


Image 103: Searching a directory entity on a list

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.

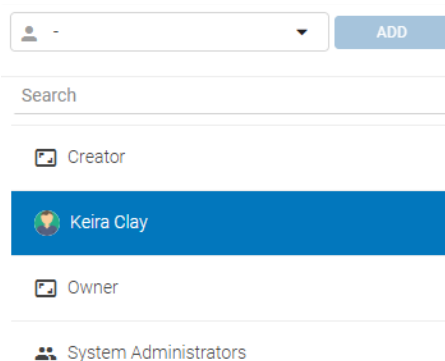


Image 104: List of directory entities with access rights to the entity

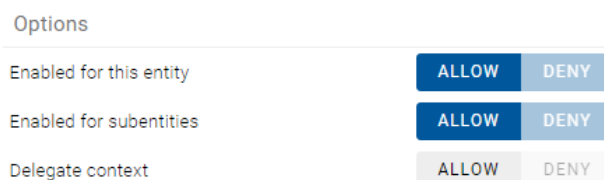
In the right part of the view a list of entity editing permissions is shown in the section »Permissions«, for the selected directory entity or an attribute of directory entity type.

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.

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

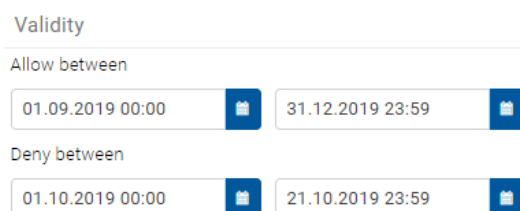
- »Enabled for this entity«: the permissions are enabled on the current entity.
- »Enabled for subentities«: enables the inheritance of permissions on contained entities.
- »Delegate context«: the access permissions apply to the user who will log in on behalf of a delegated user.



Options	
Enabled for this entity	ALLOW DENY
Enabled for subentities	ALLOW DENY
Delegate context	ALLOW DENY

Image 105: 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.



Validity	
Allow between	
01.09.2019 00:00	31.12.2019 23:59
Deny between	
01.10.2019 00:00	21.10.2019 23:59

Image 106: 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.

Development strategy

DETAILS PHYSICAL PROPERTIES **SECURITY** RETENTION

Search

Permissions Entity

Permission	Effective
Full access	ALLOW DENY
Read	ALLOW DENY
Write	ALLOW DENY
Move	ALLOW DENY
Delete	ALLOW DENY
Create entities	ALLOW DENY
Change permissions	ALLOW DENY
Change security class	ALLOW DENY
Change status	ALLOW DENY
Change retention	ALLOW DENY
Create references	ALLOW DENY
Options	
Enabled for this entity	ALLOW DENY
Enabled for subentities	ALLOW DENY
Delegate context	ALLOW DENY

Image 107: 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.

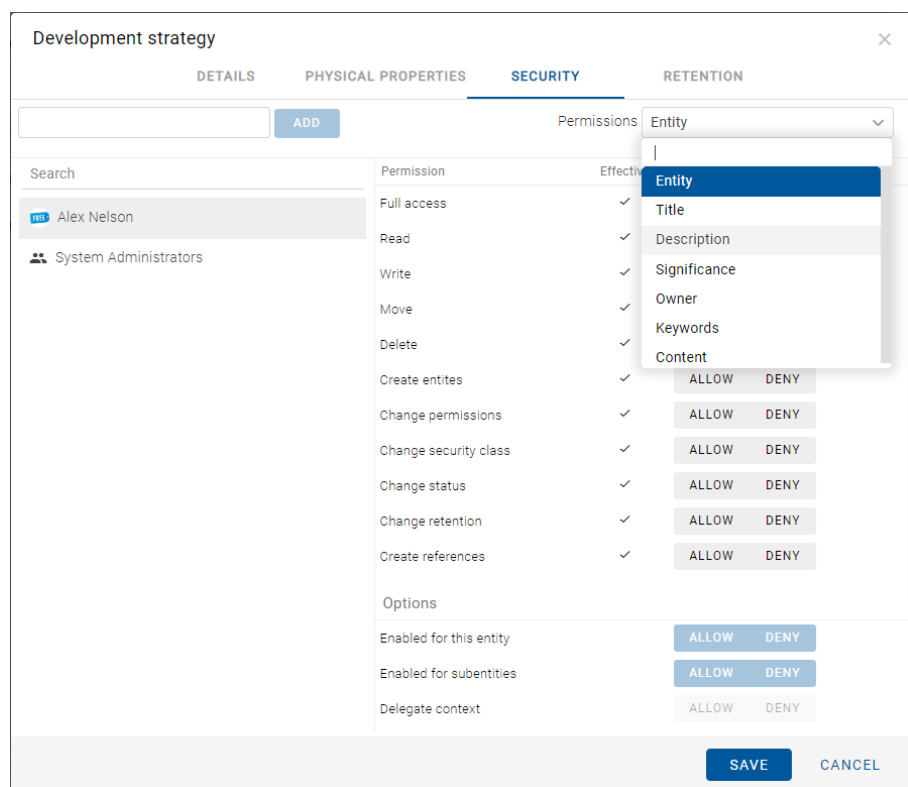


Image 108: Popup menu for selecting access rights to a selected metadata

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.

Development strategy

DETAILS PHYSICAL PROPERTIES SECURITY RETENTION

Permissions Description

Search

Alex Nelson

Permission	Effective	Explicit
Full access		ALLOW DENY
Read		ALLOW DENY
Write		ALLOW DENY
Create		ALLOW DENY
Delete		ALLOW DENY
Options		
Enabled for this entity		ALLOW DENY
Enabled for subentities		ALLOW DENY
Delegate context		ALLOW DENY
Validity		
Allow between		
Valid from		Valid to
Deny between		
Valid from		Valid to

SAVE CANCEL

Image 109: 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.

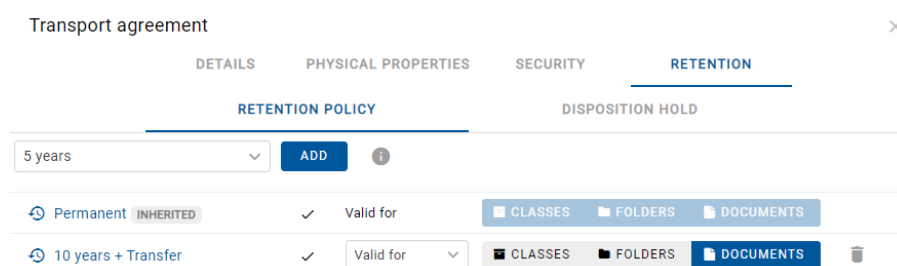



Image 110: The »Retention policy« tab in editing mode

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.

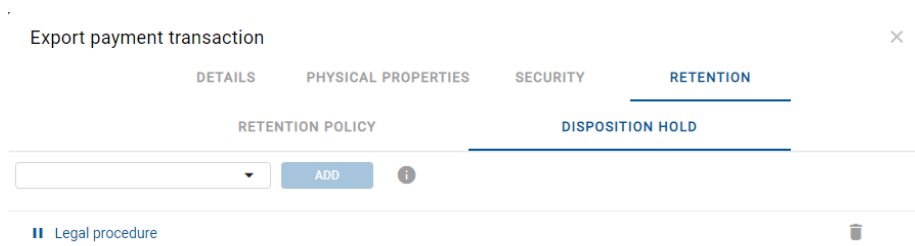



Image 111: The »Disposition hold« tab in editing mode

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 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.

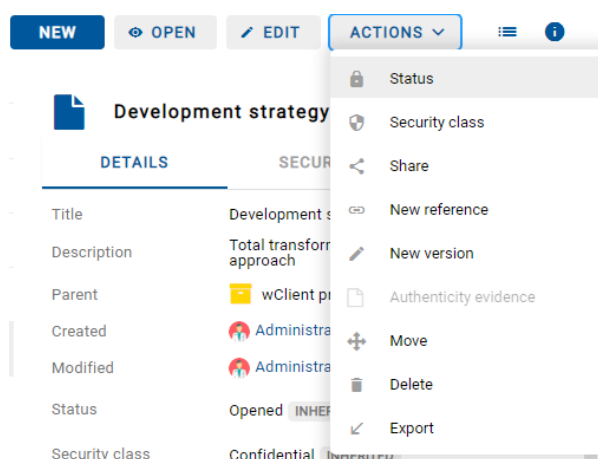


Image 112: The popup menu for selecting the »Status« command

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](#).

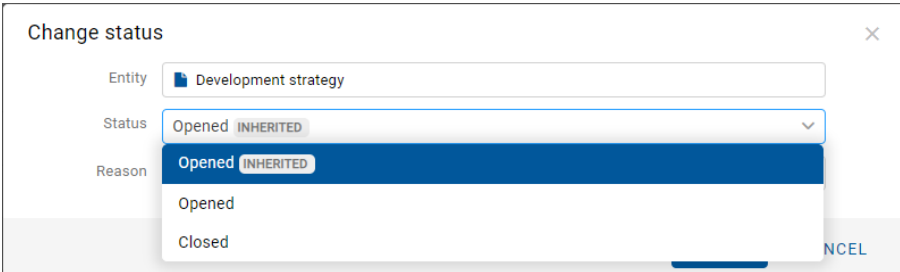
The screenshot shows a 'Change status' dialog box. The 'Entity' field contains 'Development strategy'. The 'Status' dropdown menu is open, showing 'Opened INHERITED' as the selected option. Below it, a list of reasons is visible: 'Opened INHERITED' (highlighted), 'Opened', and 'Closed'. A 'CANCEL' button is visible in the bottom right corner.

Image 113: Selecting the status and giving the reason for the change

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.

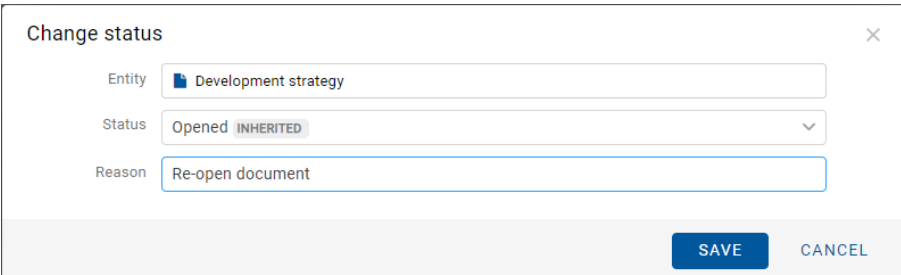
The screenshot shows the 'Change status' dialog box. The 'Entity' field contains 'Development strategy'. The 'Status' dropdown menu is open, showing 'Opened INHERITED' as the selected option. The 'Reason' field is filled with 'Re-open document'. At the bottom, there are 'SAVE' and 'CANCEL' buttons.

Image 114: Selecting the status and giving the reason for the change

4.3.3.7 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.

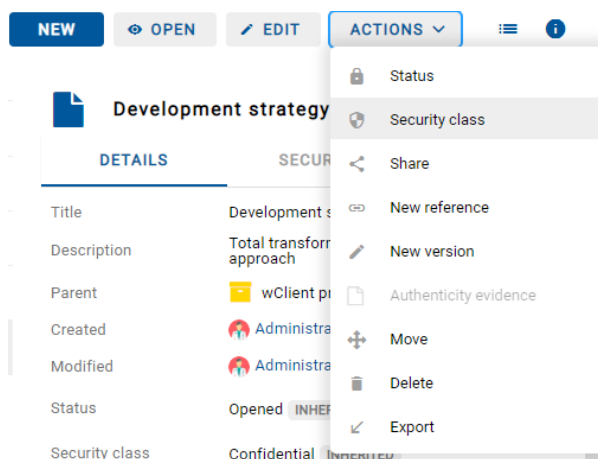


Image 115: The popup menu for selecting the »Security class« command

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](#).

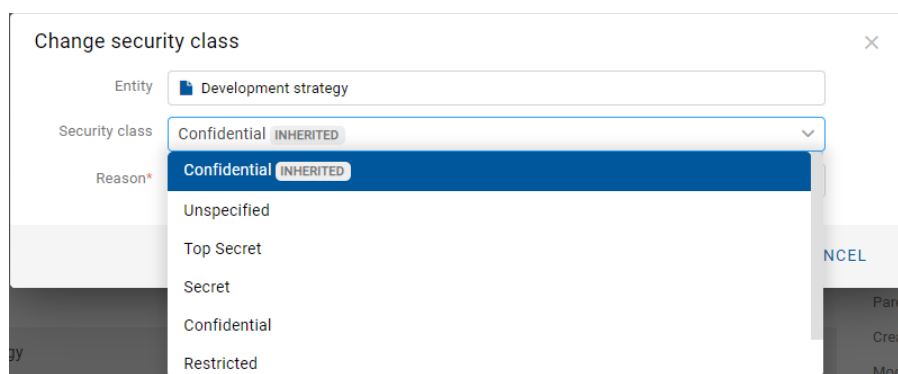


Image 116: Selecting the security class

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.

Change security class

Entity: Development strategy

Security class: Confidential INHERITED

Reason*: Raise the security class

SAVE CANCEL

Image 117: Selecting the security class and giving the reason for the change

4.3.3.8 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«.

IMiS/Archive 9.10 > Invoices > wClient project

Title	Classification Code	Modified
Development notes	38.03/000001	13/6/2019
Sales strategy	38.03/000003	13/6/2019
Release notes	38.03/000002	20/8/2019
Marketing strategy	38.03/000004	20/8/2019

NEW OPEN EDIT ACTIONS 4 results

Marketing strategy

DETAILS SECURITY

Title: Marketing strategy

Description: Description of the marketing strategy

Parent: wClient project

Administrator 3. May 2019, 09:07

Administrator 20. Aug 2019, 09:05

Opened

Top Secret

Retain

Jerry Turner

marketing strategy

wclient

7. Jun 2006, 08:42

stringmax

Retention

More

Open

Edit

Actions

Status

Security class

Share

Delete

Image 118: Selecting the command »Share« in the popup menu

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



Image 119: Displaying the created link to the selected entity

By clicking the mouse button, 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.

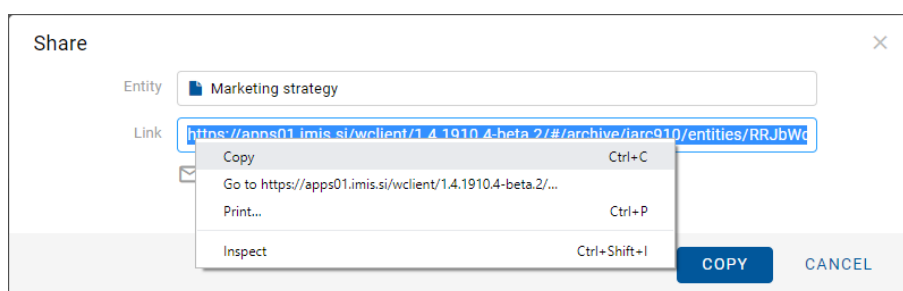


Image 120: Copying the link to the selected entity

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

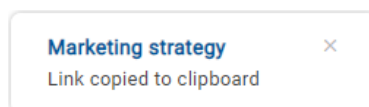


Image 121: Notification of copying a link to the clipboard

4.3.3.9 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.

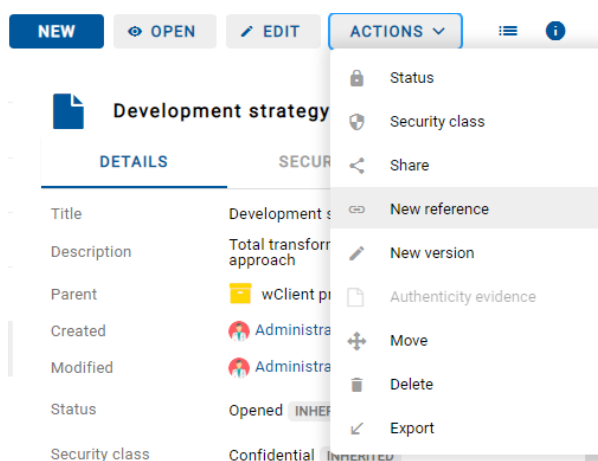


Image 122: The popup menu for selecting the »New reference« command

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

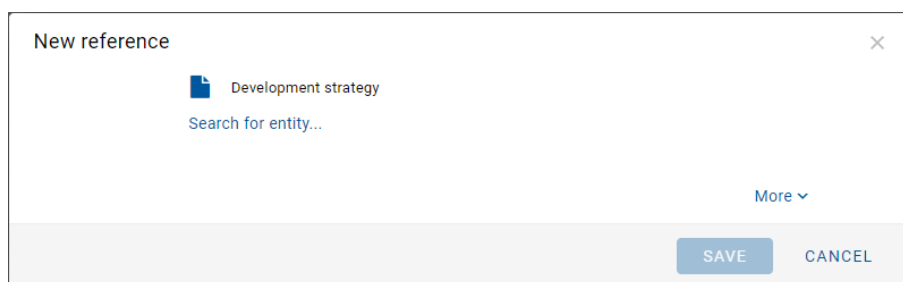


Image 123: The dialog box for adding and editing a reference

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.

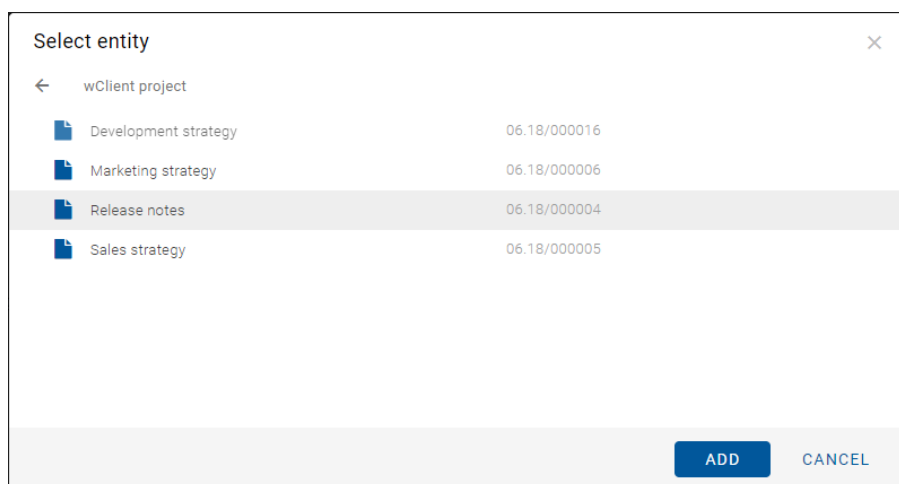


Image 124: Selecting »Search for entity« in the »New reference« dialog box

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.

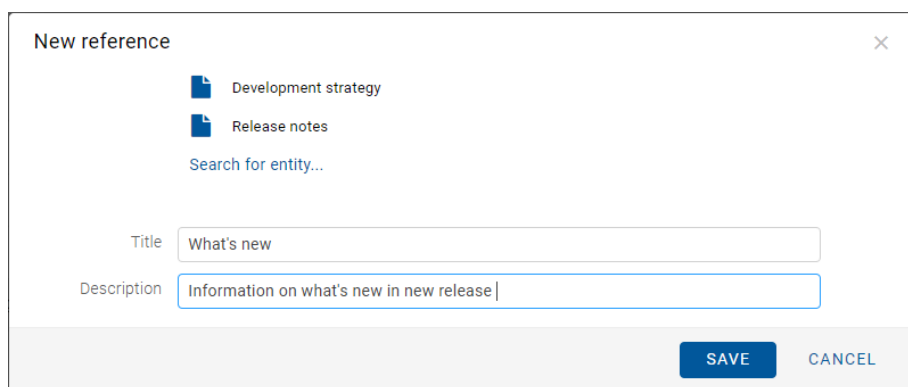



Image 125: Adding the »Title« and »Description« in the »New reference« dialog box

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

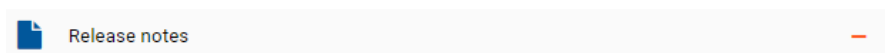



Image 126: Removing a reference before saving

***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.

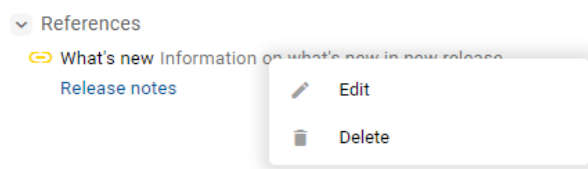


Image 127: A dialog box for selecting an action on the reference

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 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.
- popup menu on the entity chosen from the list of contained entities.

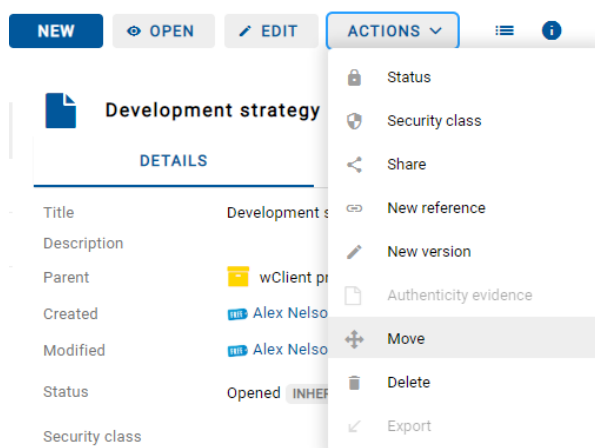


Image 128: Selecting the »Move« command via the »Actions« command in the command bar

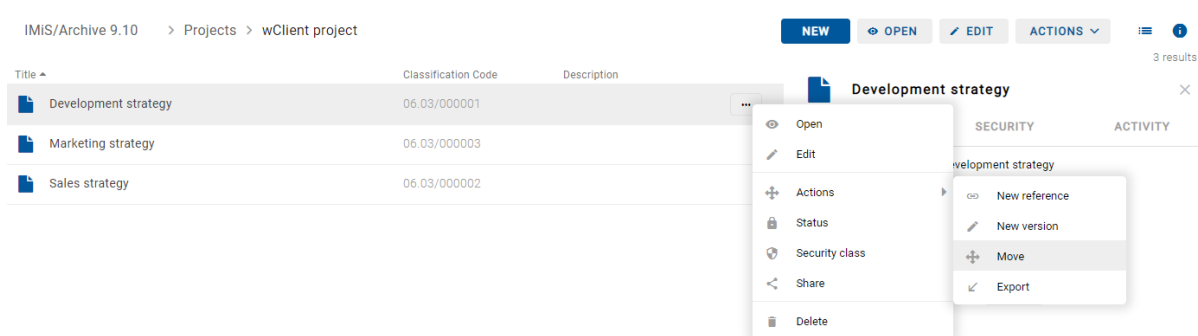


Image 129: A popup menu on the selected entity for selecting the »Move« command

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.

Move		
Selected	Development strategy	
Target	IMiS/Archive 9.10 > Projects > ARChive Server project	
Classification Code		
Reason*	Move to appropriate class	
← Projects		
+	ARChive Server project	06.02
+	AV Content	06.06
+	BatchScan project	06.04
+	Development	06.07
+	ISO Standard 9001	06.05
+	Scan project	06.01
+	wClient project	06.03
<div> NEW MOVE CANCEL </div>		

Image 130: 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«.

Move		
Selected	Development strategy	
Target	IMiS/Archive 9.10 > Projects > ARChive Server project	
Classification Code	Strategy 2025	
Reason*	Move to appropriate class	

Image 131: 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.

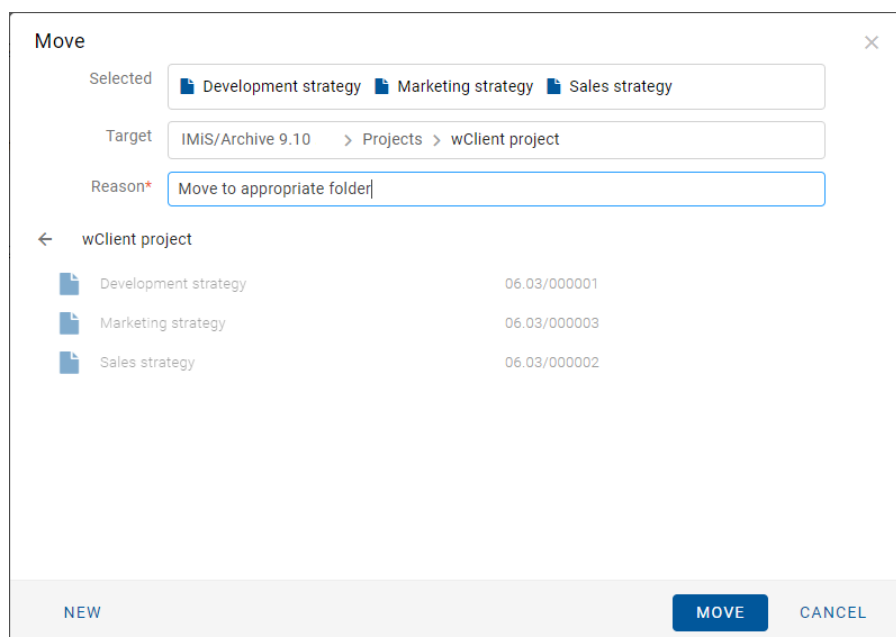


Image 132: A dialog box for moving multiple entities

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.

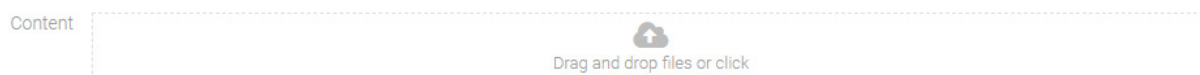


Image 133: The »Content« field for adding contents

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.

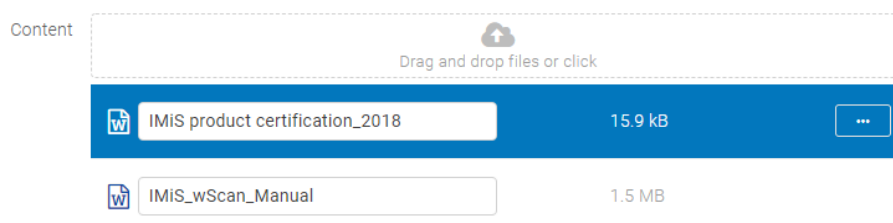


Image 134: The added content before saving

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](#).

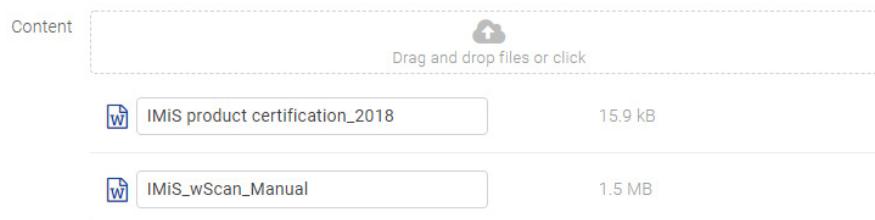



Image 135: The added content after saving

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 columns of selected attributes: »Classification code«, »Description« and »Modified« via the icon  in the command bar.

Note:

Attaching contents is possible only in the Document entity type.

IMiS/Archive 9.10 > Projects > wScan project > IMiS/wScan project doc...



Title	Size	Modified
 IMiS product certification_2018	15.9 kB	12/3/2019
 IMiS_wScan_Manual	1.5 MB	12/3/2019

Image 136: Displaying the list of contents in open mode

4.3.5.1.2 Capturing content from a scanner

If IMiS®/Capture Service is running and the scanner is connected, the icon »Scan« appears in the field for adding contents.

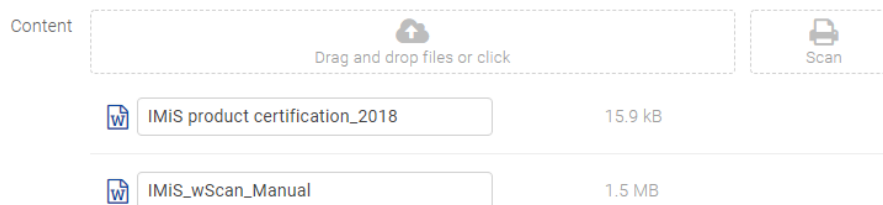


Image 137: Displaying the icon »Scan« for capturing content from a scanner

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

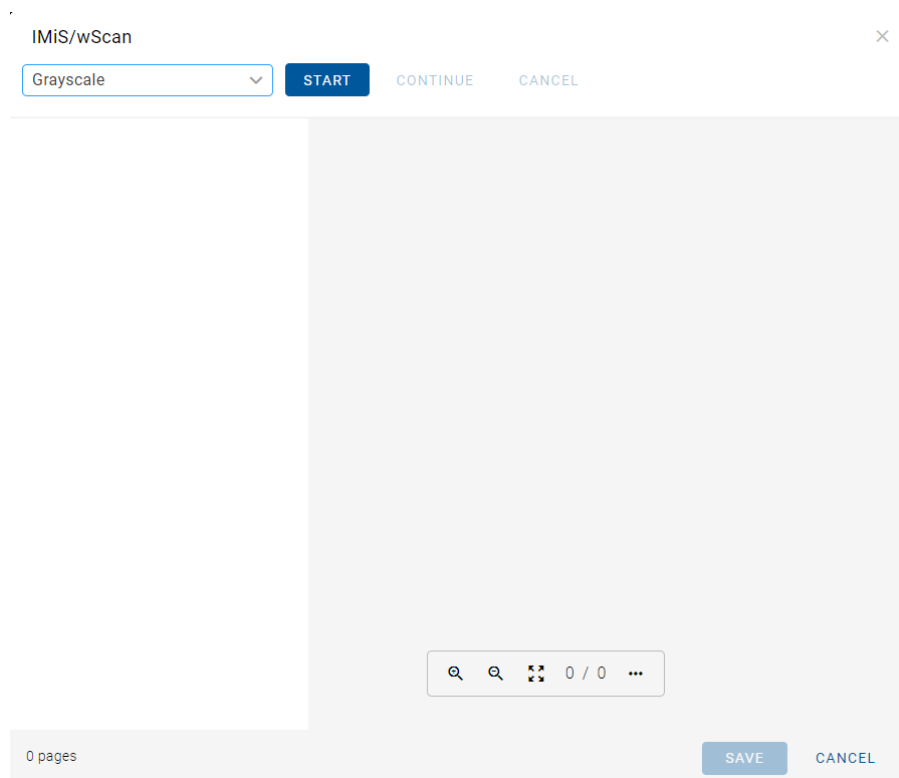


Image 138: Integrated window for scanning with IMiS®/wScan

Note:

If the user has connected or turned on the scanner 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.

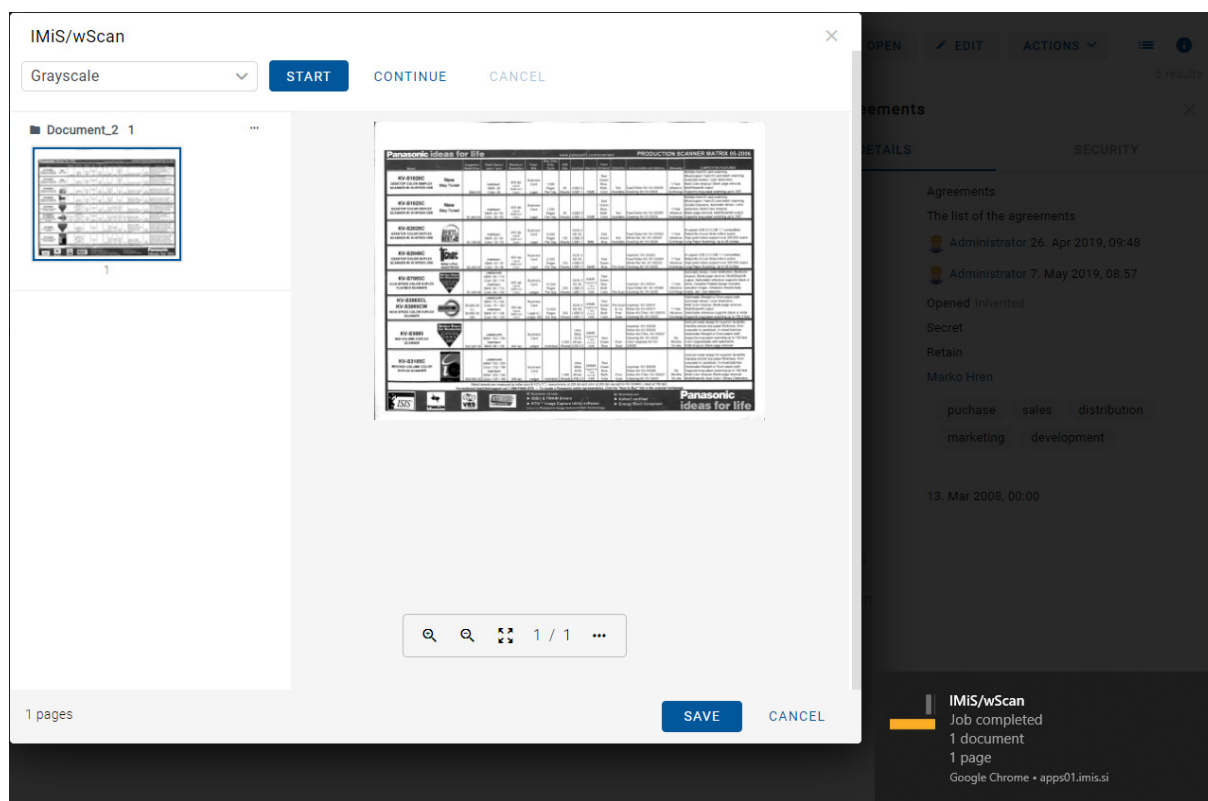


Image 139: Displaying the document after finishing the scan

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

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

Image 140: 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 settings.json under scan.apiKey and scan.url.*

```
{
  "url": "https://apps01.imis.si/isc/api/",
  "requestTimeout": 240000,
  "scan": {
    "apiKey": "imiswscan",
    "url": "http://localhost:5000"
  }
}
```

Image 141: An example of scanning settings

***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.
- 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/wClient interface. On the left, a table lists contents under the breadcrumb 'IMiS/Archive 9.10 > Invoices > wClient project'. The table has columns for Title, Classification Code, and Modified. The 'Marketing strategy' entry is highlighted. On the right, a sidebar shows the details for the 'Marketing strategy' document. The sidebar includes tabs for DETAILS, SECURITY, and ACTIVITY. The DETAILS tab is active, showing fields like Title, Description, Parent, Created, Modified, Status, Security class, Significance, Owner, Keywords, Categories, Trigger, and Retention. The 'Marketing strategy' document is described as 'Description of the marketing strategy' and is owned by 'Jerry Turner'.

Title	Classification Code	Modified
Development notes	38.03/000001	13/6/2019
Sales strategy	38.03/000003	13/6/2019
Release notes	38.03/000002	20/8/2019
Marketing strategy	38.03/000004	20/8/2019

Marketing strategy

DETAILS | SECURITY | ACTIVITY

Title: Marketing strategy
 Description: Description of the marketing strategy
 Parent: wClient project
 Created: Administrator 3. May 2019, 09:07
 Modified: Administrator 20. Aug 2019, 09:05
 Status: Opened
 Security class: Top Secret
 Significance: Retain
 Owner: Jerry Turner
 Keywords: marketing, strategy
 Categories: wclient
 Trigger: 7. Jun 2006, 08:42
 Retention: > Retention
 More: > More

Image 142: 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.

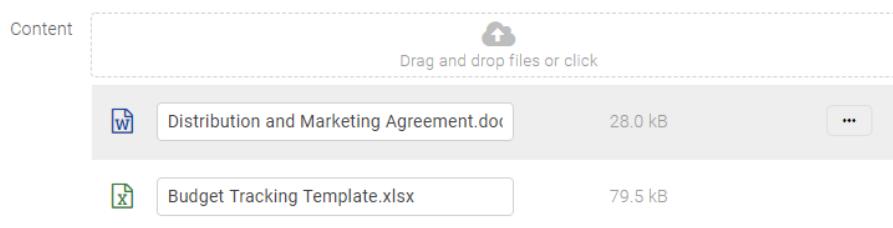



Image 143: Changing the description of content in editing mode

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.

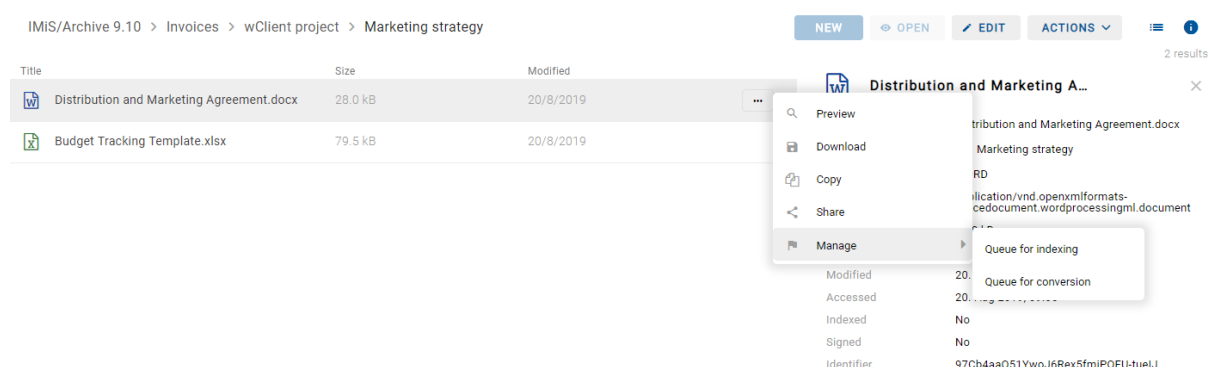


Image 144: Popup menu on the selected content in the reading mode

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 145: 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 8. May 2018, 14:43

Image 146: 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 8. May 2018, 14:43

Image 147: 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 8. May 2018, 14:43

Image 148: 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 1b6cdcdcdc9a7fb3d57851d72500f2cf5440d9b170dd
015ab6140a1da5ed0ace

Image 149: An example of the document content identifier

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

Indexed Yes

Image 150: An example of a display of indexed document content

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

Signed No

Image 151: 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«).

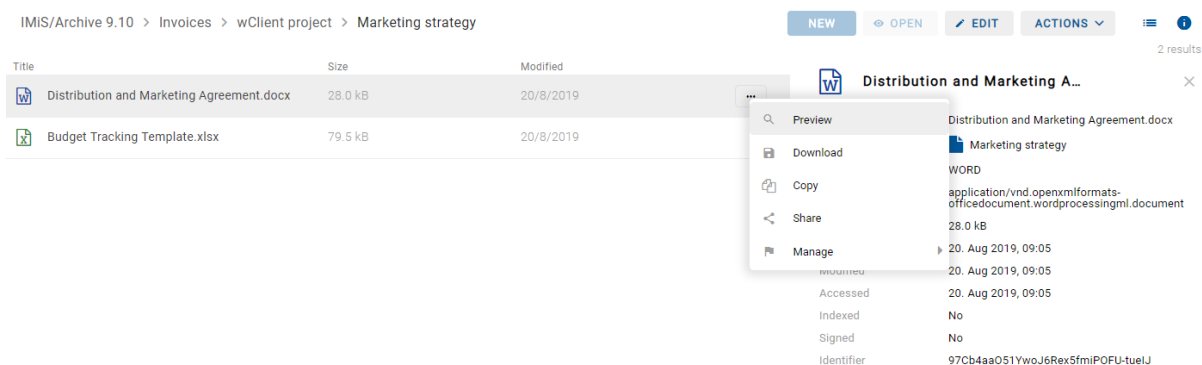


Image 152: Opening document content

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

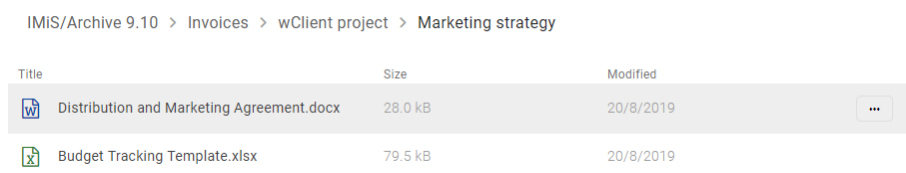


Image 153: Opening content by clicking on the content

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](#).

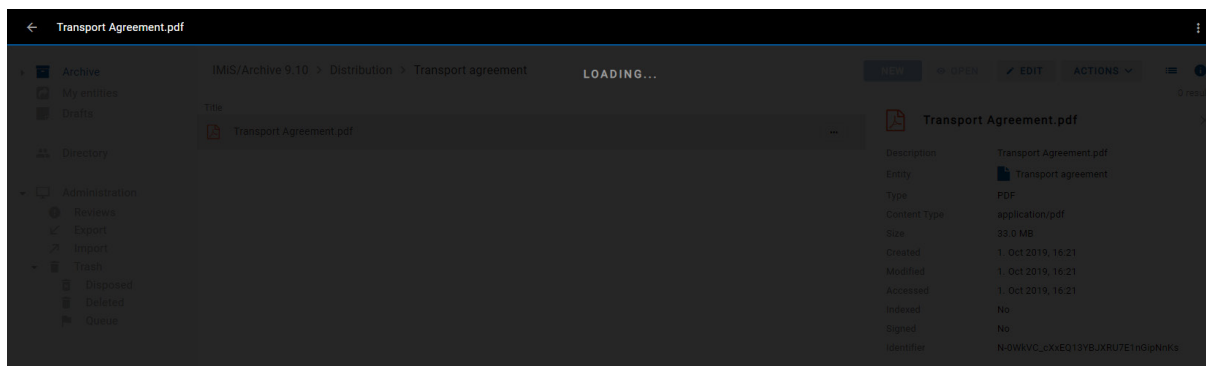


Image 154: Loading content

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.

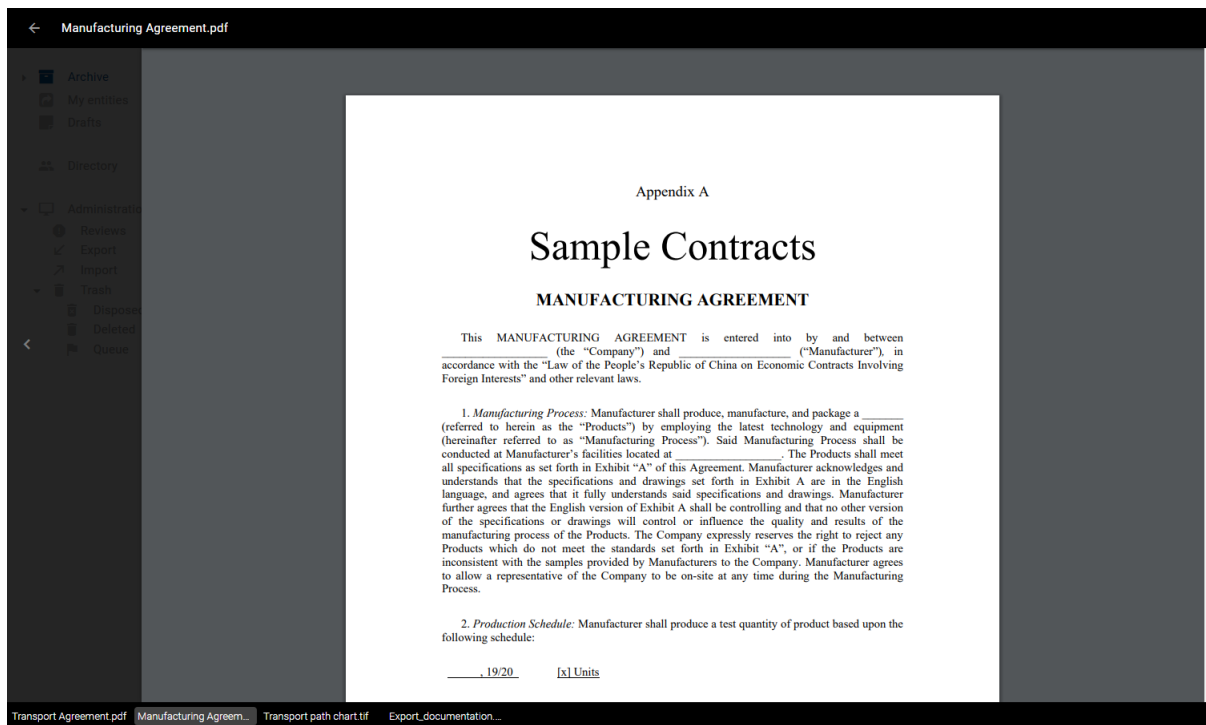


Image 155: Displaying the menu for selecting and previewing content

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/1.4.1910.4/#/archive/iarc910/entities/zfYqFvEAWEmR-3J TNwBSS09QulfNzmx/view?id=Fg2iVnw9UVVr9 aY3lbOafI--Of6R-Zq>

Example 2: Link with the parameter index 1

<https://apps01.imis.si/wclient/1.4.1910.4/#/archive/iarc910/entities/tEN0xhdLKSYeQ7ujK3SAP8Ob9UpjP43 /view?index=1>

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

<https://apps01.imis.si/wclient/1.4.1910.4/#/archive/iarc910/entities/tEN0xhdLKSYeQ7ujK3SAP8Ob9UpjP43 /view>

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 156: Opening audio content

- Video (mp4, webm, ogg)

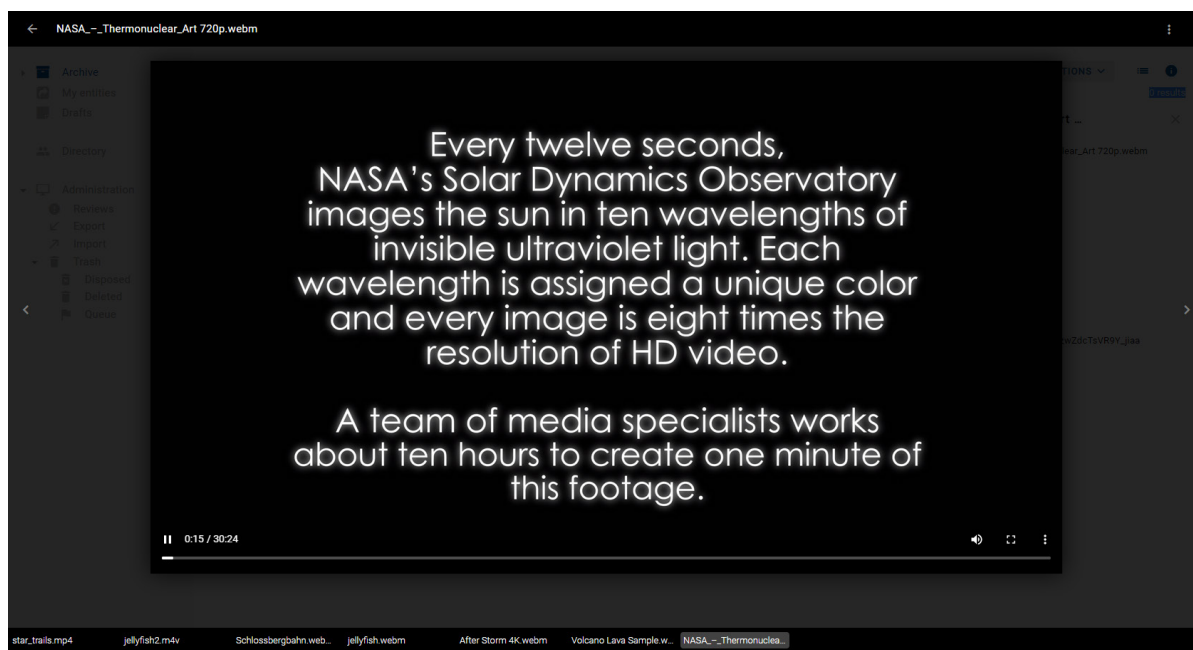


Image 157: Opening video content

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

4.3.5.5 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.

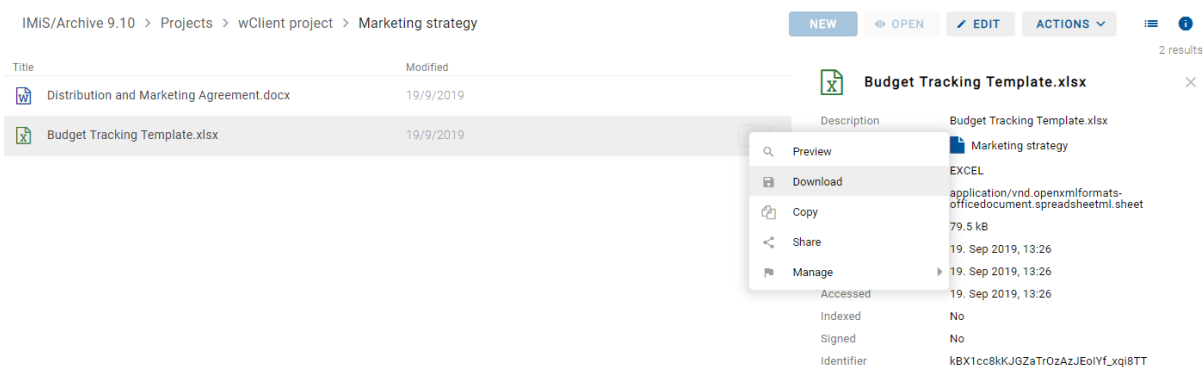


Image 158: Selecting the »Download« command in the popup menu

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

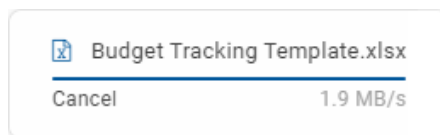


Image 159: Displaying the progress of the download of content

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

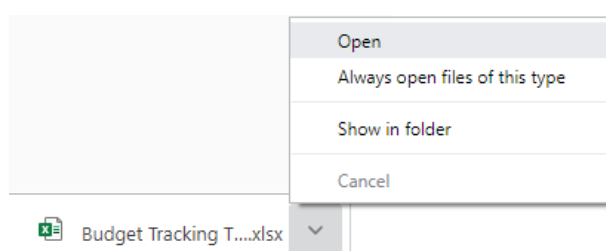


Image 160: Displaying the option of selecting actions on downloaded content

4.3.5.6 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.

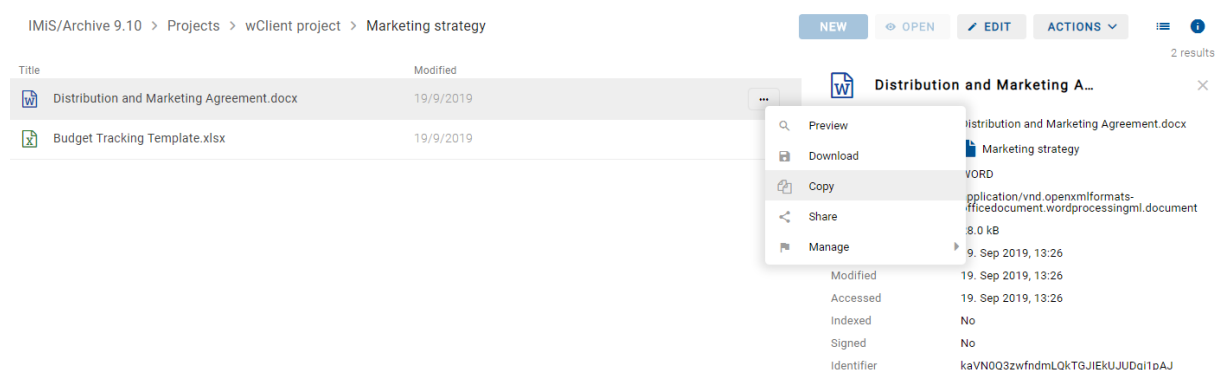


Image 161: Selecting the »Copy« command in the popup menu

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

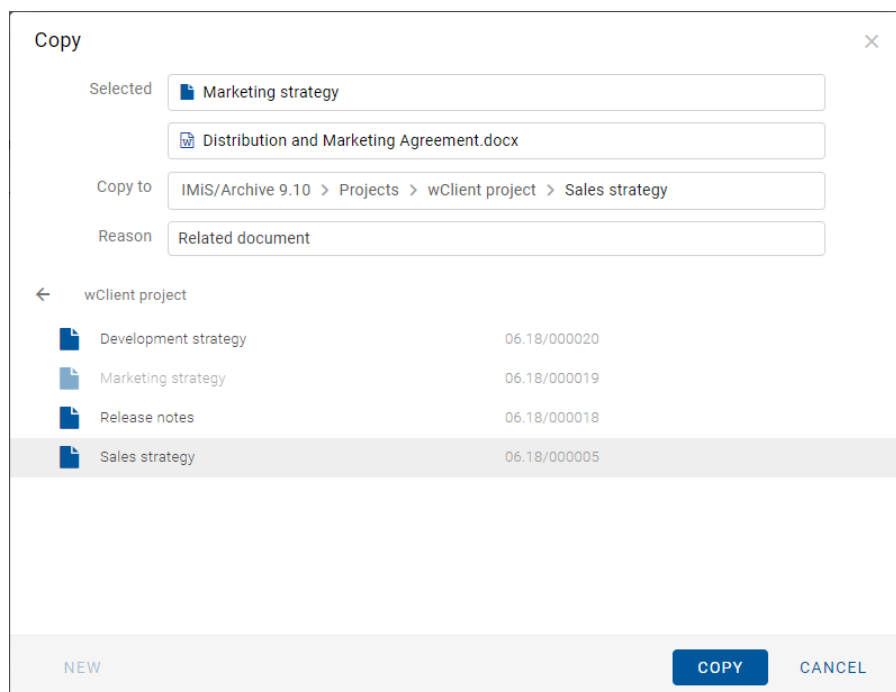


Image 162: Copying the content to another document

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.

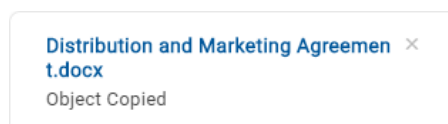


Image 163: Information about saving a copy of the content

4.3.5.7 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«.

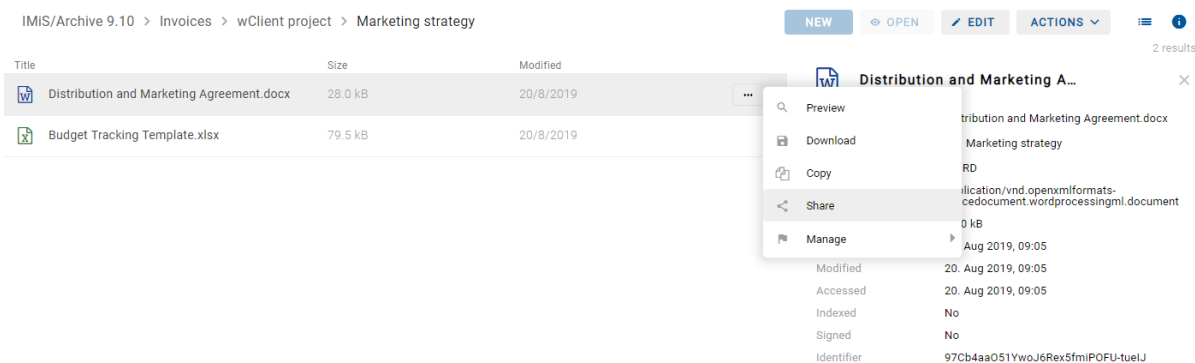


Image 164: Selecting the command »Share« in the popup menu

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

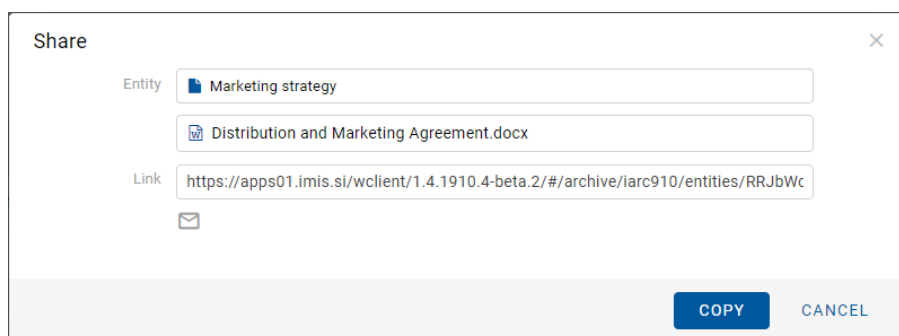


Image 165: Displaying the created link to the selected content

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

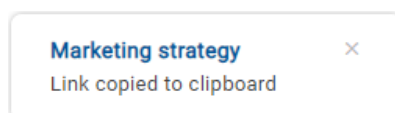


Image 166: Notification of copying a link to the clipboard

4.3.5.8 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.

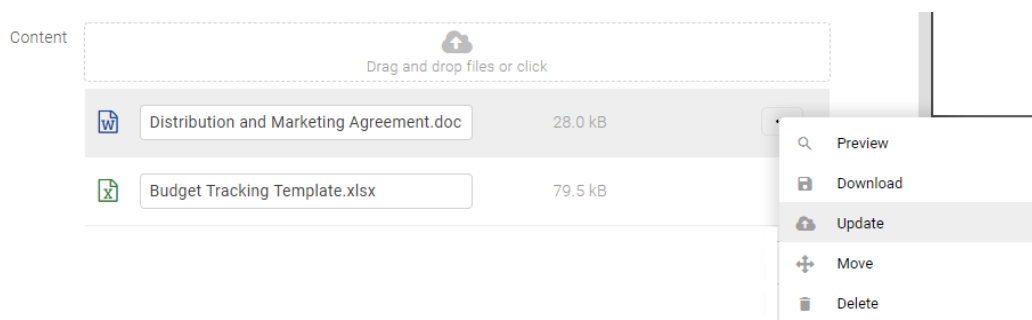


Image 167: Selecting the »Update« command in the popup menu

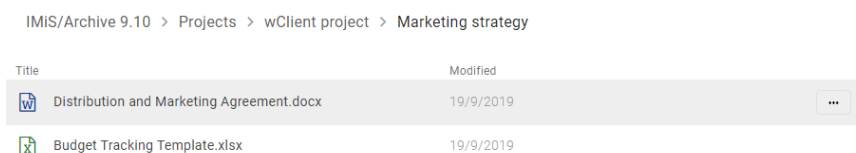


Image 168: The selected content after update

4.3.5.9 Moving content

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.

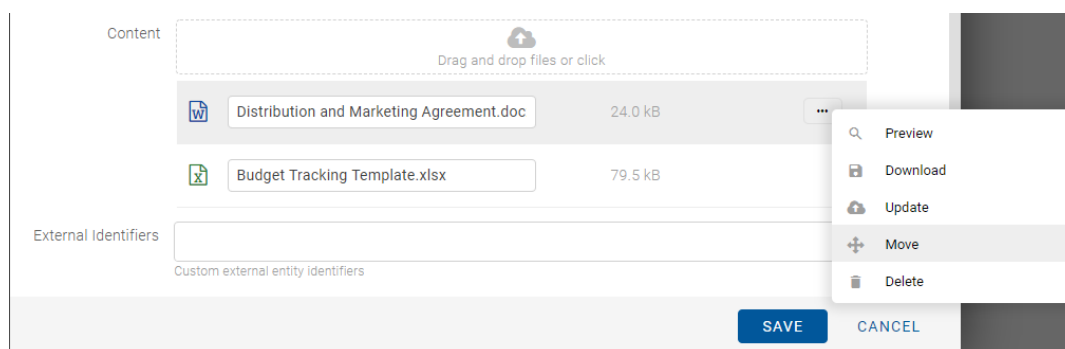


Image 169: Selecting the »Move« command in the popup menu

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

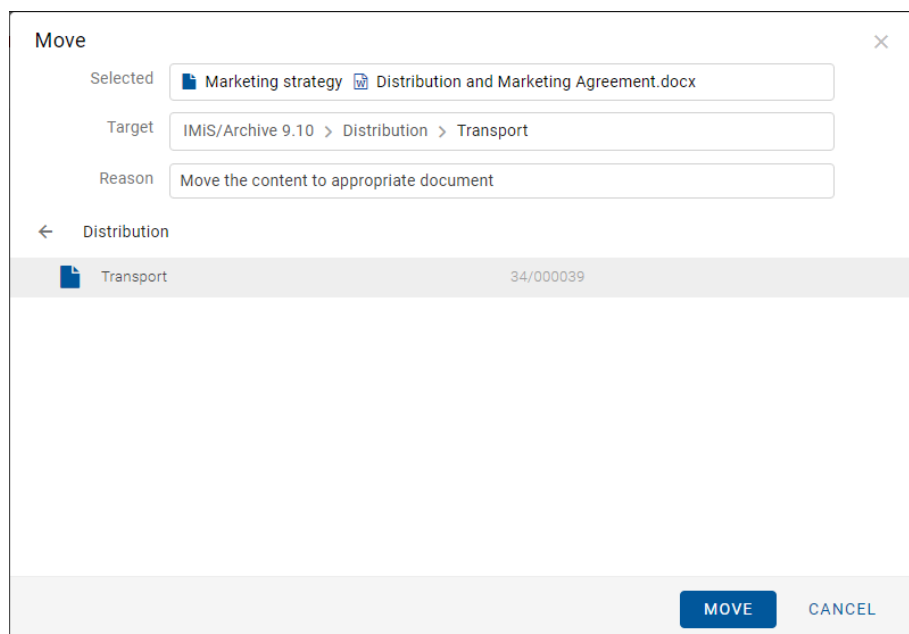


Image 170: Selecting the target document for moving content

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

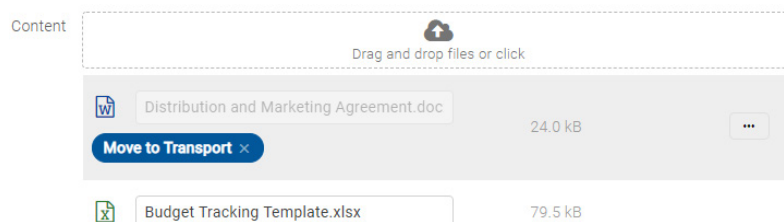


Image 171: Content temporarily removed from the document

Content move is not performed until after saving changes.

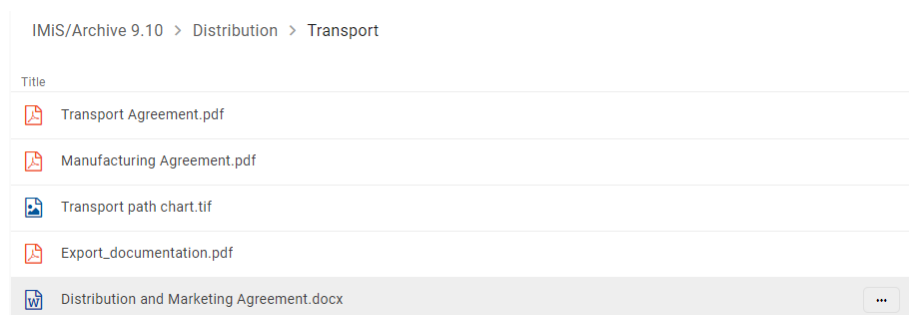


Image 172: Saved document content

4.3.5.10 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.

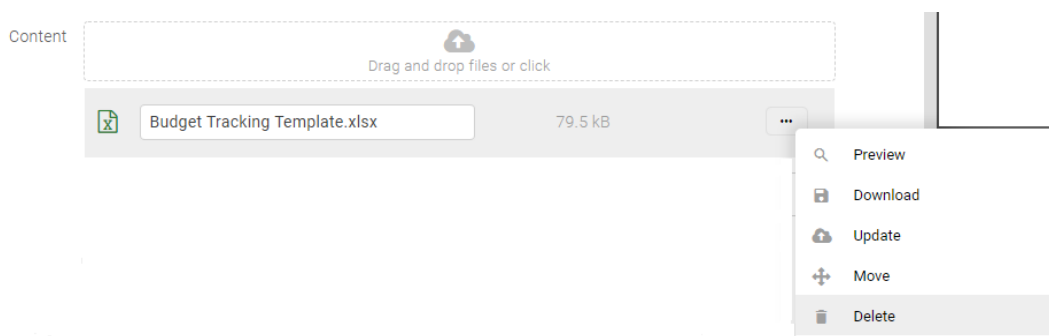


Image 173: The content on the list before deletion

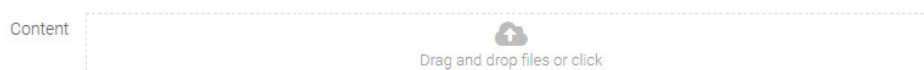


Image 174: Empty list after deletion

4.3.5.11 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.

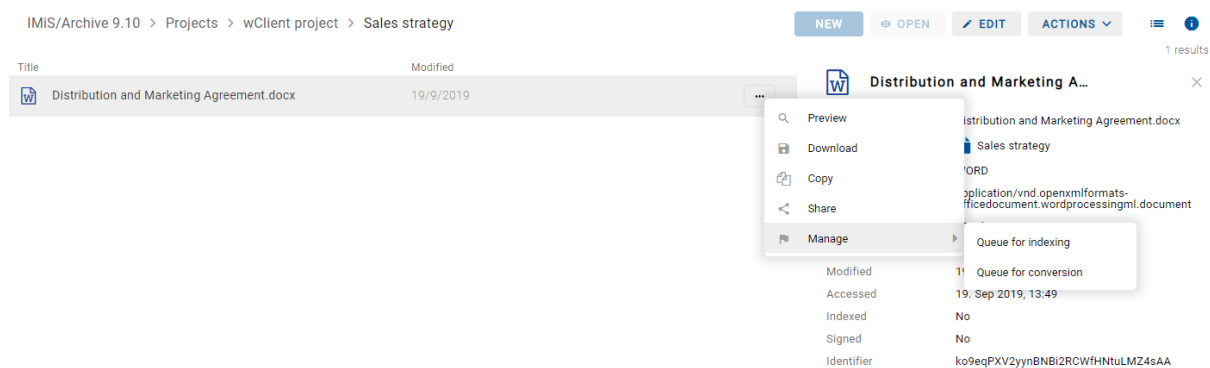


Image 175: Selecting the »Queue for Indexing« command

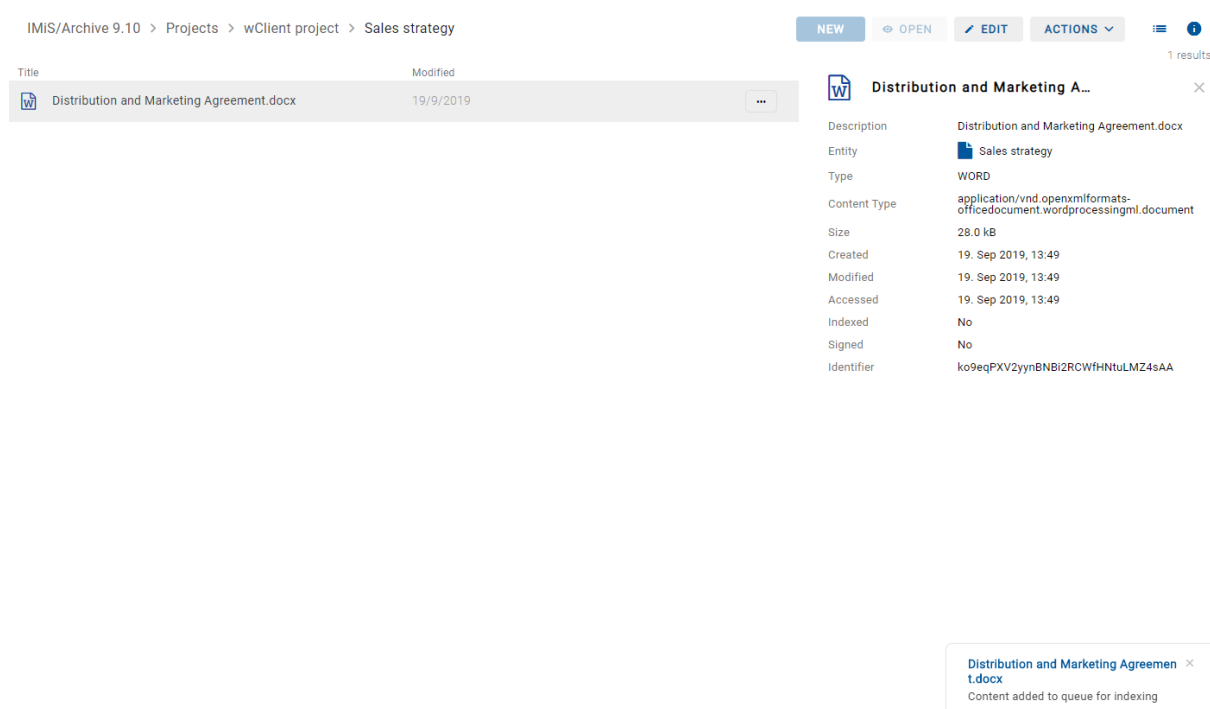


Image 176: Successful adding of content for indexing

4.3.5.12 Content conversion

The IMiS®/ARChive Server enables automatic content conversion. All newly added content is automatically converted to a long-term storage format after being stored according to the period 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.

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.

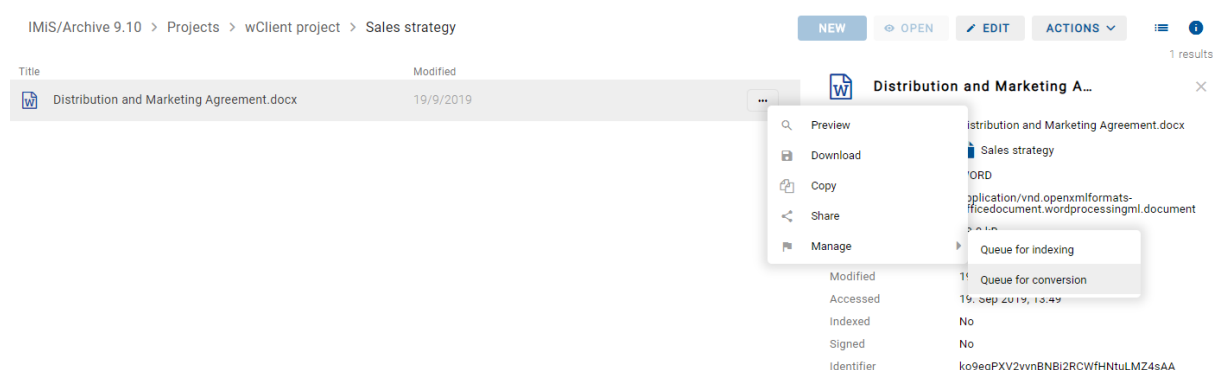


Image 177: Selecting the »Queue for Conversion« command

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

The screenshot displays the IMiS/wClient interface. At the top, the breadcrumb navigation shows 'IMiS/Archive 9.10 > Projects > wClient project > Sales strategy'. The main area is divided into two panels. The left panel shows a table with columns 'Title' and 'Modified', containing one entry: 'Distribution and Marketing Agreement.docx' with a modification date of '19/9/2019'. The right panel shows a detailed view of the selected document, 'Distribution and Marketing A...'. It includes a description, entity ('Sales strategy'), type ('WORD'), content type ('application/vnd.openxmlformats-officedocument.wordprocessingml.document'), size ('28.0 kB'), and creation/modification dates ('19. Sep 2019, 13:49'). A notification box at the bottom right states: 'Distribution and Marketing Agreemen t.docx Content added to queue for conversion'.

Image 178: Successful tagging of content for later conversion

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.

Marketing strategy

DETAILS PHYSICAL PROPERTIES SECURITY RETENTION

Template* Document Standalone document entity

Title* Marketing strategy Mandatory value for naming entity

Description Description of the marketing strategy

Significance None

Owner Jerry Turner

Keywords marketing strategy Important words used in entity

Categories wclient

Content

Drag and drop files or click

File	Size	Actions
Decision Structure.jpg	19.2 kB	
Decision Structure.pdf	25.6 kB	Preview, Download, Detach, Delete
Decision Structure [OCR].docx	9.6 kB	

SAVE

Image 179: Detaching the selected converted content

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

Content

Drag and drop files or click

File	Size	Actions
Decision Structure.jpg	19.2 kB	
Decision Structure.pdf	25.6 kB	Detach

Image 180: Tagging content for detachment

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

IMiS/Archive 9.10 > Production > Marketing strategy





Title	Modified
>  Decision Structure.jpg	20/9/2019
>  General session.png	20/9/2019
>  Mechanical design.tif	20/9/2019
 Decision Structure.pdf	20/9/2019

Image 181: 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 all document-type entities. The properties that have been modified in individual document versions can be reviewed only on templates that enable versioning.

***Note:** This functionality is supported in IMiS®/ARCHive Server version 9.9 or higher.*

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.

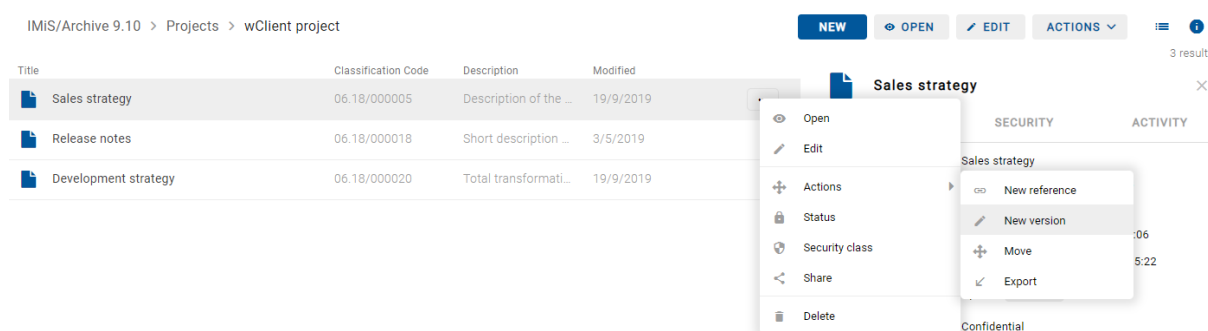


Image 182: Selecting the action »New version« in the popup menu

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.

The screenshot shows a web application window titled "Sales strategy" with a close button (X) in the top right corner. The window has two tabs: "DETAILS" (active) and "SECURITY".

Under the "DETAILS" tab, the following fields are visible:

- Version:** A dropdown menu is open, showing options: "Major" (selected), "Minor", "3rd level", "4th level", and "Overwrite".
- Comment:** A text input field.
- Title*:** A text input field.
- Description:** A text input field with the placeholder text "Description of the sales activities".
- Owner:** A text input field showing "Administrator" with a user icon.
- Keywords:** A text input field containing "sales" and "strategy" as tags.
- Categories:** A text input field containing "wclient" as a tag.
- Content:** A section for uploading files. It includes a dashed box with the text "Drag and drop files or click" and a cloud icon. Below it, a file named "Distribution and Marketing Agreement.doc" is shown with a size of "28.0 kB".
- Trigger:** A text input field showing "20.09.2019 21:40" and a calendar icon.
- stringmax:** A text input field.

At the bottom of the window, there are four buttons: "SAVE DRAFT", "DISCARD", "SAVE", and "CANCEL".

Image 183: 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.

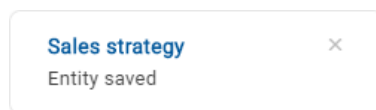


Image 184: Information about saving a document version

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.

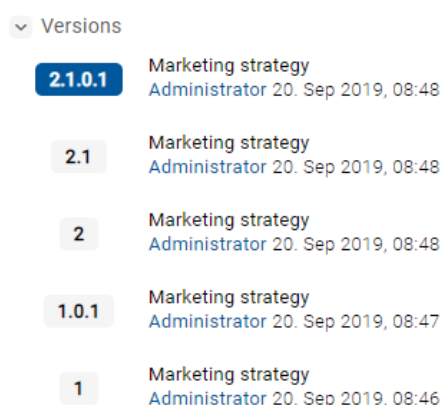



Image 185: Displaying document versions in the set »Versions«

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.

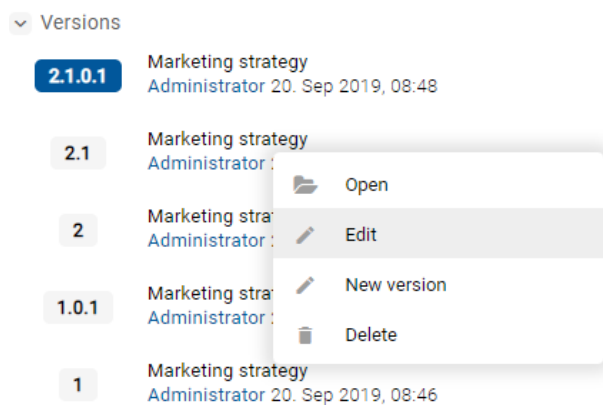


Image 186: A popup menu on the document version

In edit mode the user can change the attribute values.

The image shows the 'Marketing strategy' edit form. The form has tabs for DETAILS, PHYSICAL PROPERTIES, SECURITY, and RETENTION. The DETAILS tab is active, showing fields for Description, Significance, Owner, Keywords, Categories, Content, and External Identifiers. The Content field shows a list of files: Decision Structure.jpg, General session.png, Mechanical design.tif, and Decision Structure.pdf. The form also has a 'SAVE' button and a 'CANCEL' button.

Image 187: 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«.

The screenshot shows a web interface for editing a document titled "Marketing strategy". The "DETAILS" tab is active. A dropdown menu for "Version" is open, showing "Minor" as the selected option. Other options include "Major", "3rd level", "4h level", and "Overwrite". The "Comment" field is empty. The "Title" field has a dropdown with "3rd level" and "4h level". The "Description" field contains the text "Description of the marketing strategy". The "Owner" field shows "Administrator". The "Keywords" field contains "marketing" and "strategy". The "Categories" field contains "wclient". The "Content" section has a file upload area with the text "Drag and drop files or click". Below this, there are three files listed: "Decision Structure.jpg" (19.2 kB), "General session.png" (15.1 kB), and "Mechanical design.tif" (935.2 kB). At the bottom of the form, there are four buttons: "SAVE DRAFT" (highlighted with a red box), "DISCARD", "SAVE", and "CANCEL".

Image 188: 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.

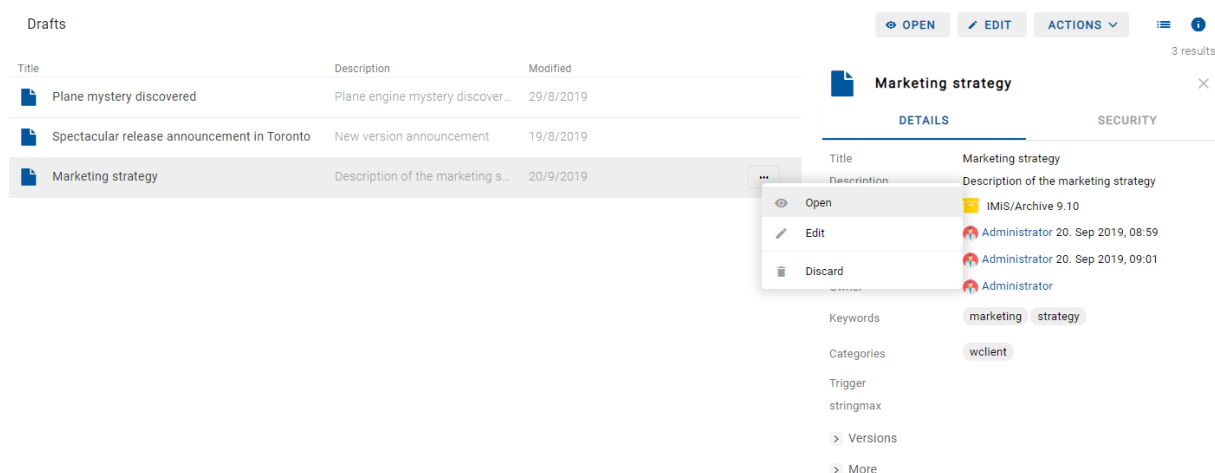



Image 189: A draft of a document version in the »Drafts« folder

***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.

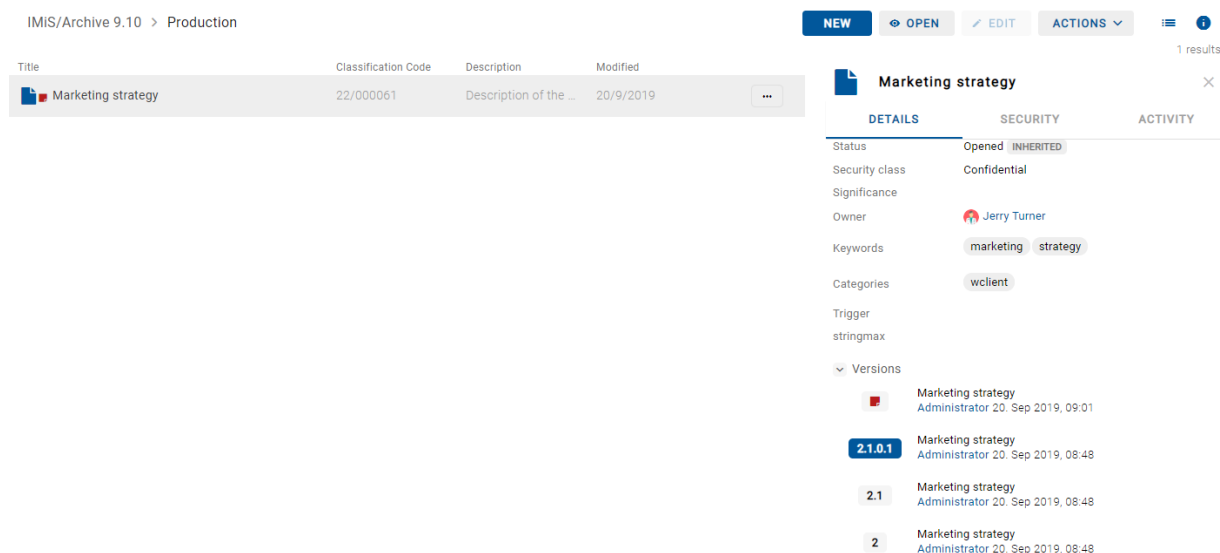


Image 190: Displaying the draft in the list of versions

4.3.6.5 Discarding draft

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

Marketing strategy

DETAILS SECURITY

Version 4h level

Comment

Title* Marketing strategy
Mandatory value for naming entity

Description Description of the marketing strategy

Owner Administrator

Keywords marketing strategy

Categories wclient

Content

Drag and drop files or click

> Decision Structure.jpg 19.2 kB

> General session.png 15.1 kB

> Mechanical design.tif 935.2 kB

SAVE DRAFT DISCARD SAVE CANCEL

Image 191: 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.

The screenshot shows a web-based form for editing a document titled "Marketing strategy". The form is divided into two tabs: "DETAILS" and "SECURITY". The "DETAILS" tab is currently selected. It contains several input fields and a list of files. The "Version" field is set to "3rd level". The "Comment" field contains "3rd level of the document versioning". The "Title*" field is "Marketing strategy" with a note "Mandatory value for naming entity". The "Description" field is "Description of the marketing strategy". The "Owner" field shows a user icon and the name "Administrator". The "Keywords" field contains "marketing" and "strategy". The "Categories" field contains "wclient". The "Content" section shows a list of files: "Decision Structure.jpg" (19.2 kB), "General session.png" (15.1 kB), and "Mechanical design.tif" (935.2 kB). At the bottom of the form, there is a command bar with four buttons: "SAVE DRAFT", "DISCARD", "SAVE", and "CANCEL".

Image 192: 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 which refer to the:

- conditions for searching by metadata
- content descriptions
- full text of document contents.

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.



Image 193: Entering a search string in the »Search« field

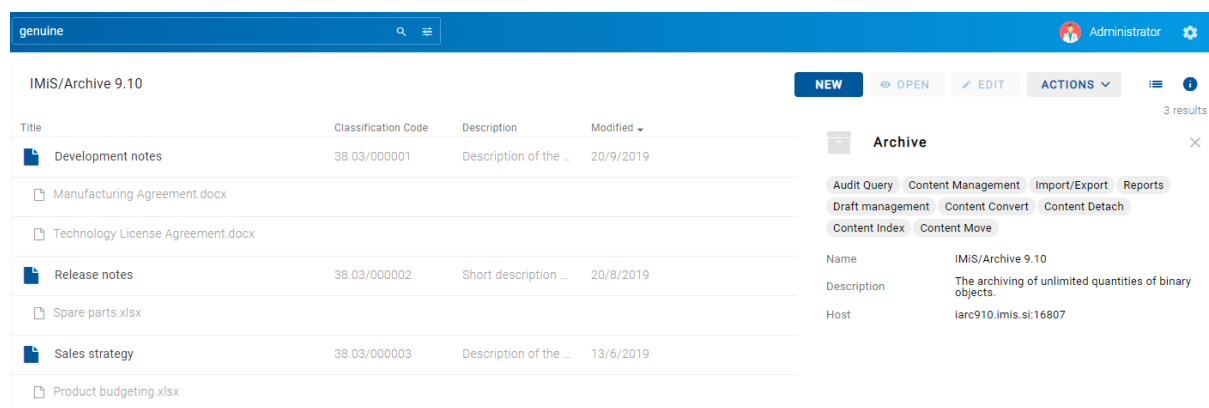

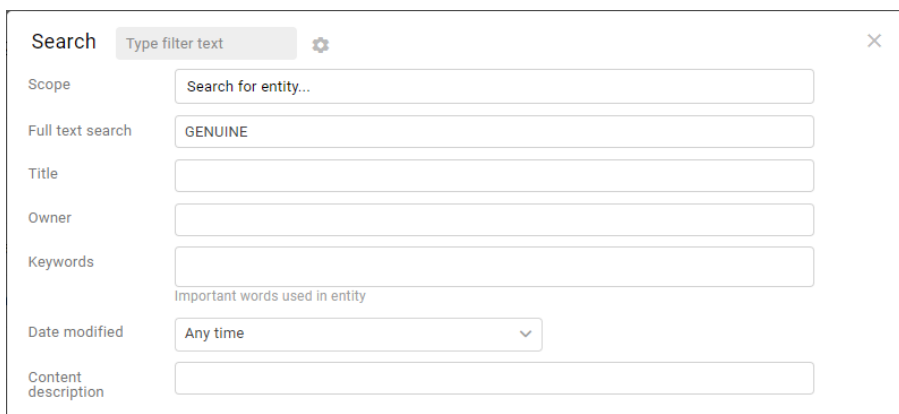


Image 194: A full text search result

An alternative way of searching the full text of the content is by selecting the icon  in the header of the user interface and entering the search string in the »Full text search« field in the »Search« dialog box.

The user can create a search string from one or multiple simple search conditions.

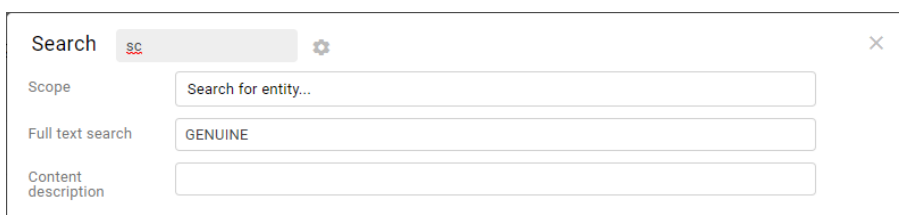


The screenshot shows a 'Search' dialog box with a close button (X) in the top right corner. At the top, there is a 'Type filter text' input field and a gear icon. Below this, several search criteria are listed on the left, each with a corresponding input field on the right:

- Scope: Search for entity...
- Full text search: GENUINE
- Title: (empty)
- Owner: (empty)
- Keywords: (empty)
- Important words used in entity: (empty)
- Date modified: Any time (dropdown menu)
- Content description: (empty)

Image 195: 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' dialog box, but the 'Type filter text' field at the top now contains the text 'sc'. The 'Full text search' field still contains 'GENUINE'. The other search criteria fields remain empty.

Image 196: Entering text to limit the set of attributes for the search

Example 1: The user previously searched by the value of the attribute »Full text search« = GENUINE. 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 GENUINE.

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«.

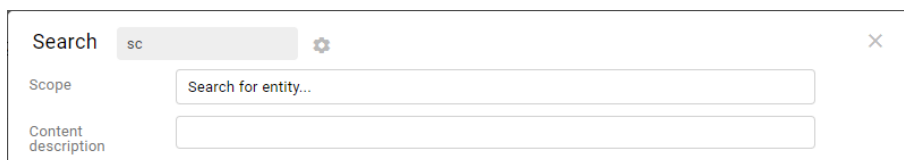



Image 197: Example of limiting the set of attributes for the search

An alternative option for limiting the set of attributes which will be searched is via the menu. By selecting the icon , a menu opens in which the user unchecks the attributes which will not be searched. In the menu, the user is offered only system attributes and not custom attributes.

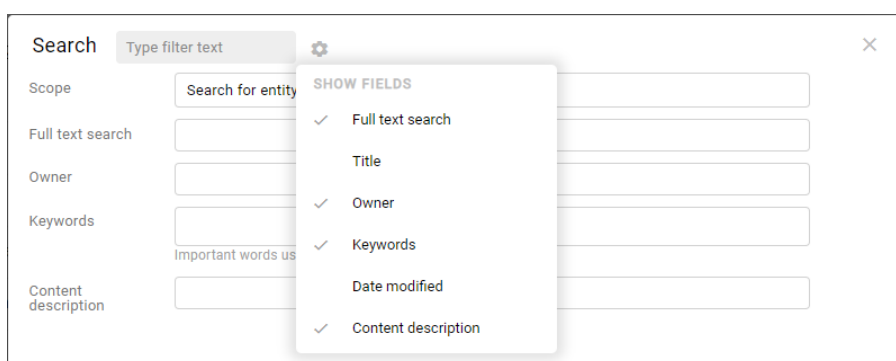


Image 198: Limiting the set of attributes for the search via the menu

The full text search is case insensitive and searches only by the text file formats from which the IMiS®/ARChive Server can extract the text.

The user can also perform a wildcard search by using the special characters »*« and »?« in the search string.



Image 199: A wildcard search by using special characters

Besides values and special characters, the user can also use »Operator« in the search string. It is about the logical operators for chaining simple search conditions into complex search conditions. The available operators are the logical inclusive (AND), the logical interchangeable (OR), and the logical mutually exclusive (XOR).

Image 200: Searching using operators

The search result is shown in the central view of the user interface. It contains only the list of entities or contents to which the user has access.

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, ...)

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 Search by metadata

The user can search by metadata by selecting the icon  in the header of the user interface and selecting the values from the list, or by entering a search string in the following fields in the »Search« dialog box:

- »Scope«: the entity under which the search will be implemented.
- Title: name of the entity.
- Owner: owner of the entity.
- Keywords: keywords related to the entity.
- »Date modified«: date of the last entity modification.

Creates a search string from one or multiple simple search conditions.

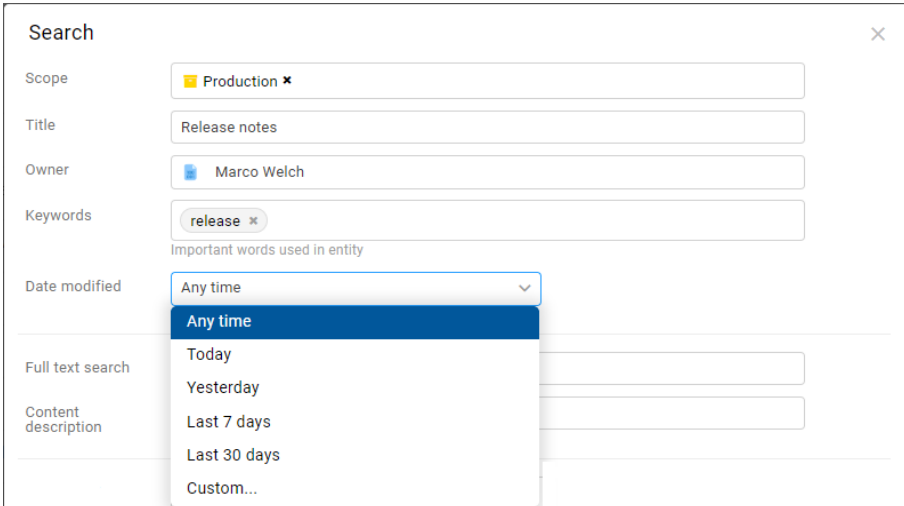


Image 201: A dialog box for searching by metadata

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.

Search [X]

attr:string20

attr:uint64

bool ☐

Date

Date time

Datum nastanka
Datum nastanka gradiva

Datum sklenitve

Datum zaključka
Datum zaključka kreditne pogodbe

decimal10

double

Editors +
List of directory entities which can modify the entity

Enolična številka

ePero Proces
Identifikator procesa iz sistema SETCCE ePero

Končni datum

Labels

Naziv partnerja

SEARCH **CANCEL**

Image 202: A dialog box for searching by custom metadata

Search [X]

Scope

Title

Owner

Keywords
Important words used in entity

Date modified

Between

Full text search

Content description

SEARCH **CANCEL**

Image 203: Specifying the time range of searching by »Date modified«

When choosing text metadata, the search value must be text. When searching text metadata, the value does not have to be exactly identical.

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.

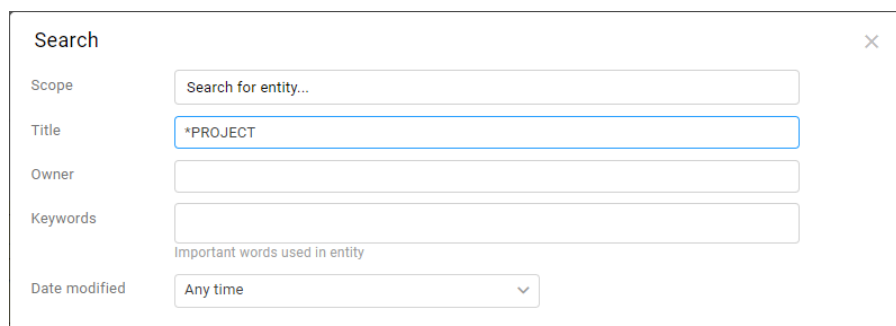
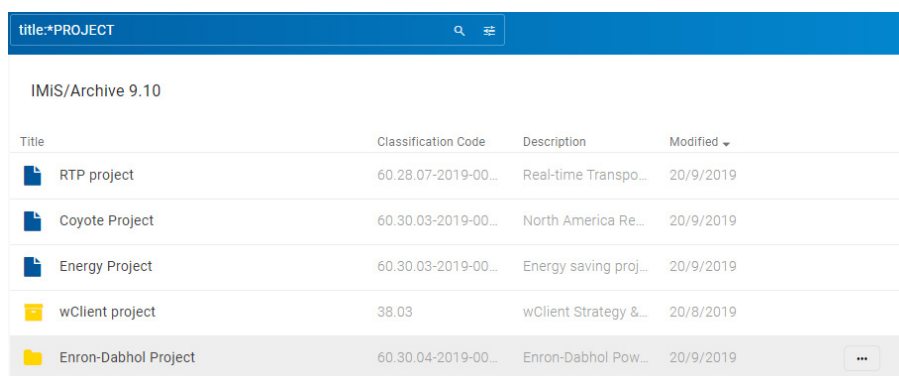


Image 204: Use of special characters in a search string



Title	Classification Code	Description	Modified
RTP project	60.28.07-2019-00...	Real-time Transpo...	20/9/2019
Coyote Project	60.30.03-2019-00...	North America Re...	20/9/2019
Energy Project	60.30.03-2019-00...	Energy saving proj...	20/9/2019
wClient project	38.03	wClient Strategy &...	20/8/2019
Enron-Dabhol Project	60.30.04-2019-00...	Enron-Dabhol Pow...	20/9/2019

Image 205: An example of a result of searching by metadata using special characters

Note:

The user does not have to pay attention to the use of small and capital letters, because the search is case insensitive.

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«.

This does not work when searching metadata whose value is represented by the name of an IMiS®/ARChive Server user (for example the metadata »Owner«).

For these values, 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 a sidebar on the left containing the following labels: Scope, Title, Owner, Keywords, Date modified, Full text search, and Content description. The 'Owner' field is active, displaying a dropdown menu with two options: 'Alex Nelson' (highlighted in blue) and 'Alex Nelson (anelson)' (highlighted in dark blue). The 'Keywords' field also shows 'Alex Nelson (anelson)'. Below the dropdown, there is a section titled 'Important words used in entity'. The 'Date modified' field has a dropdown menu set to 'Any time'. The 'Full text search' and 'Content description' fields are empty text boxes.

Image 206: A dialog box for searching by the metadata »Owner«

Tip:

To make the archive clearer, the administrator should, if possible, recommend a standard structure for naming entities and metadata (upper and lower case, abbreviations...) saved to the server.

4.3.7.3 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:«.







raw:[sys:Status]=1 AND [sys:Category]=w*		
IMIS/Archive 9.10		
Title ^	Classification Code	Description
 Development notes	06.18/000002	Description of the develop...
 Marketing strategy	06.18/000006	Description of the marketin...
 Release notes	06.18/000004	Short description of the rel...
 Sales strategy	06.18/000005	Description of the sales act...

Image 207: The search string and the results of searching by actual value

4.3.7.4 Search by content descriptions

The user searches by the document content description by selecting the icon  in the header of the user interface and entering the search string into the »Content description« field in the »Search« dialog box.

Search ×

Scope  Distribution ✕

Title

Owner

Keywords

Important words used in entity

Date modified Any time ▾

Full text search REGULATIONS.PDF

Content description

Image 208: A dialog box for searching by the content description

The IMiS®/wClient can perform a »wildcard search« by using special characters in the search string:

- »*« means zero or more characters of any kind.
- »?« means any character.

The screenshot shows a 'Search' dialog box with the following fields and values:

- Scope:** Distribution (with a dropdown arrow)
- Title:** (empty text box)
- Owner:** (empty text box)
- Keywords:** (empty text box)
- Important words used in entity:** (empty text box)
- Date modified:** Any time (with a dropdown arrow)
- Full text search:** ASSIGNMENT* (highlighted with a blue border)
- Content description:** (empty text box)

Image 209: Use of special characters in a search string

The user does not have to pay attention to the use of small and capital letters, because the search by the content description is case insensitive.

Example:

If the user is searching entities by the content descriptions, the search string:


- *»a*« searches for entities containing contents whose titles begin with the letter »a«.*
For example, producing: »aa«, »Administration«, »authorization«, »A-test« and »Auto Service«.
- *»*traffic*« searches for entities containing contents whose titles contain the »traffic« character string.*
For example: »traffic light«, »havy traffic«, »road traffic jam «.
- *»*en« searches for entities containing contents whose titles end with the »en« character string.*
For instance: »then«, »when«, »hen«, »maiden«.
- *»d?b« searches for entities containing contents whose titles have a specific 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«.

In the central view the user is shown the search results.

4.3.7.5 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 selecting the icon  in the header of the user interface and entering the search strings into the relevant fields, or by selecting the value of the attribute »ASSIGNMENT« from the list in the »Search« dialog box.

Note:

The combined search takes the logical operator »AND« into account.

4.3.7.5.1 Combined search by metadata and full text search

The user can simultaneously search by metadata and by the full text of the content.

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. ASSIGNMENT).

The searched text can contain one or multiple simple search conditions.

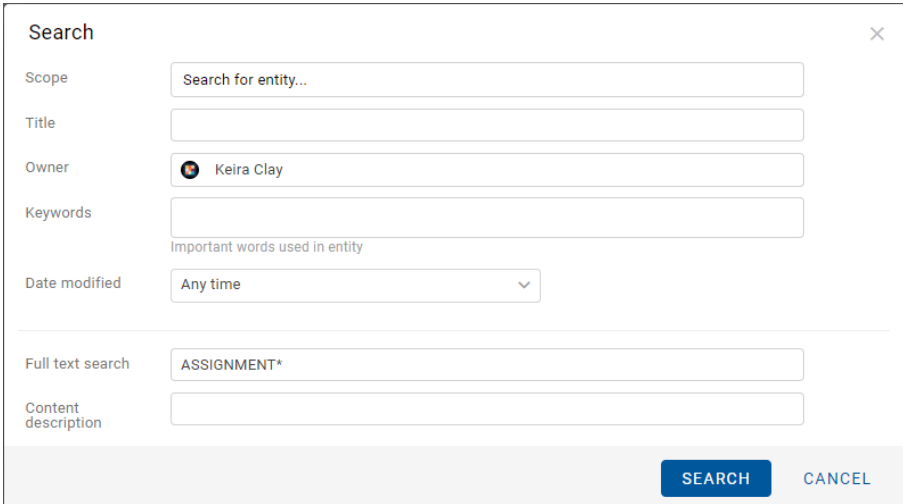


Image 210: Entering a search string in a combined search

4.3.7.5.2 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 = executive) and whose content descriptions also contain the searched text (e.g. IMiS).

Image 211: Entering a search string when searching by metadata and the content description

Title	Classification Code	Description	Modified
Executive committee	01.01.02-2019-00...	3.1064377.JD5VS...	20/9/2019
Hillary Simpson.docx			

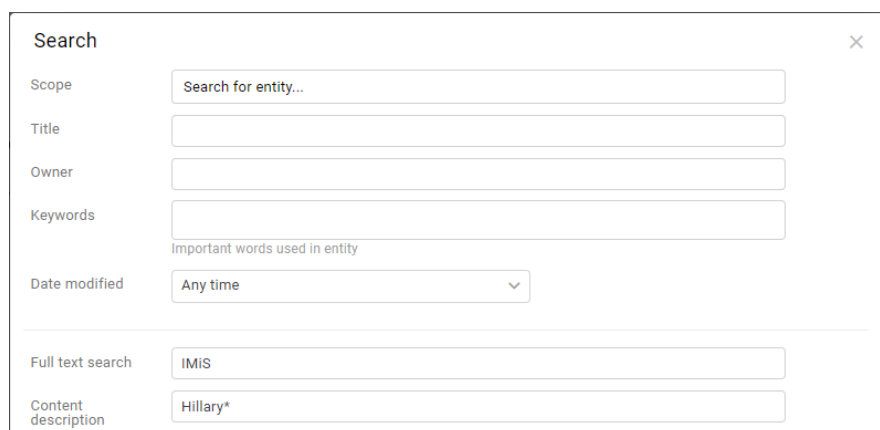
Image 212: Results of searching by metadata and the content description

4.3.7.5.3 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. Hillary) and whose content also contains the searched text (e.g. IMiS).

The searched text can contain one or multiple simple search conditions.



Search [X]

Scope: Search for entity...

Title:

Owner:

Keywords:

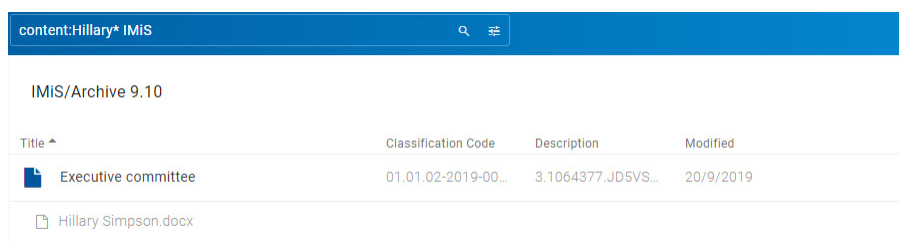
Important words used in entity

Date modified: Any time [v]

Full text search: IMIS

Content description: Hillary*


Image 213: Entering a search string when searching by the text of the content and the content description



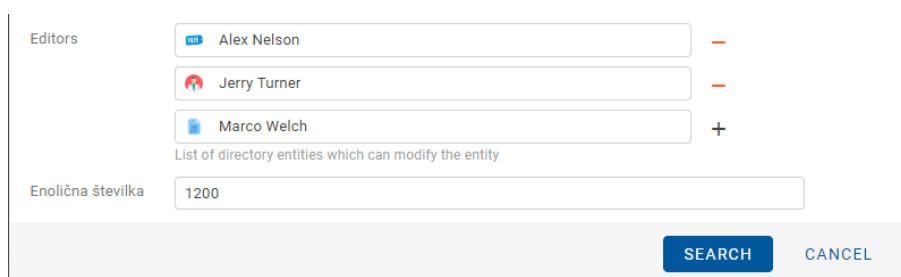
content:Hillary* IMIS			
IMIS/Archive 9.10			
Title ^	Classification Code	Description	Modified
Executive committee	01.01.02-2019-00...	3.1064377.JD5VS...	20/9/2019
Hillary Simpson.docx			

Image 214: Displaying the result of searching by the text of the content and the content description

4.3.7.5.4 Search by metadata

The user searches by custom metadata by selecting the icon  in the header of the user interface, selecting the value of the attribute »Name« from the list, and entering the search string in the field »Value« in the »Search« dialog box.

The search result is all the documents whose values of the custom attribute »Editors« match the search string »Alex Nelson«, »Jerry Turner« or »Marco Welch« AND the value of the custom attribute »Unique number« equals 1200.



Editors: Alex Nelson -

Jerry Turner -

Marco Welch +


List of directory entities which can modify the entity

Enolična številka: 1200

SEARCH **CANCEL**

Image 215: Entering the search string when searching by a custom attribute

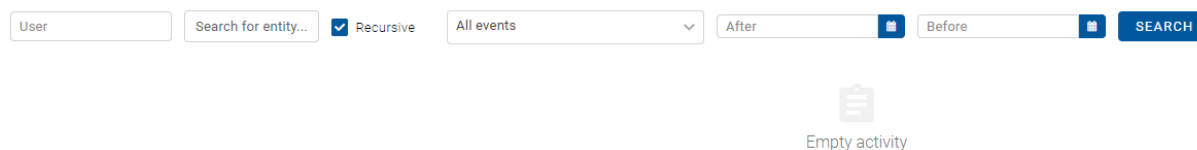
4.3.7.6 Searching audit log events

The user searches for information on audit log events by selecting the icon  next to the user's name in the header of the user interface.

By selecting the action »Activity«, a dialog box opens for searching for information on 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.
- »Entity«: in the entity tree the user selects the entity for which information on selected audit log events will be displayed.
- »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.
- »All events«: selecting the audit log events for which the information will be displayed.
- »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.

Activity



Empty activity

Image 216: Information on audit log events

By selecting the action »Search«, a list of audit log events that match the search criteria is shown by pages. The number of events and users for each day in the selected time period is shown in graphs.

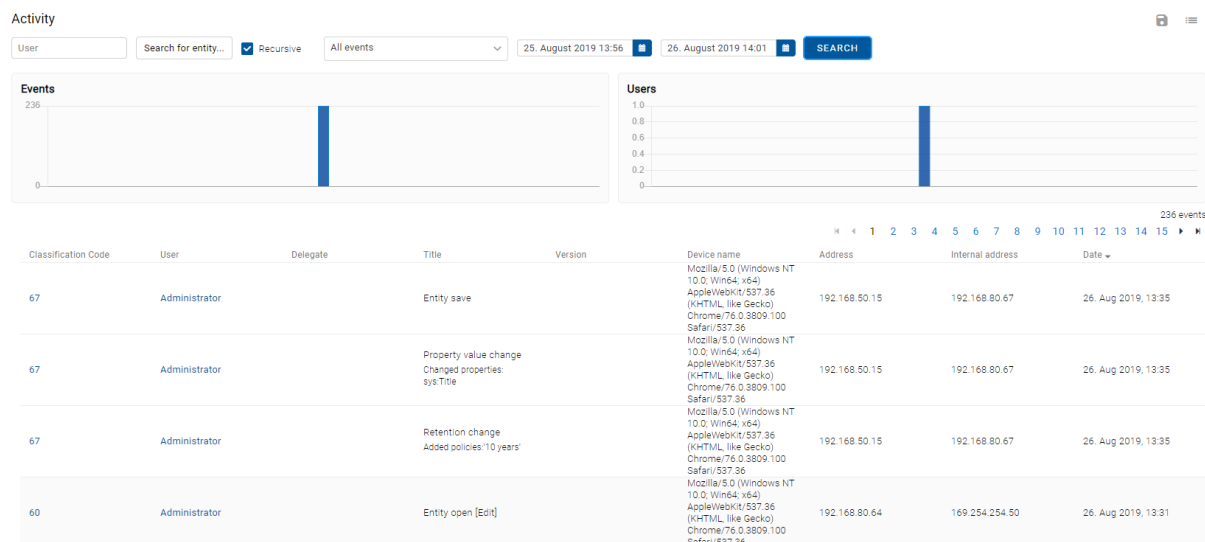




Image 217: List of audit log events

By selecting the icon  in the top right part of the view, a popup menu appears with the following options:

- »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.

By selecting the icon  (Export) in the top right part of the view, 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	K	L	M	N	O	P
	1	Sequence Time	User	Address	Computer	Internal Address Id		Classification	Event Type		Event Desc	Delegate				
2	2	235 2019-08-26T11:35:58Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	Pf3gk6klWvy-b29HcFI8qbuOCCXKDFr	C=67	ENTITY_SAVE	Read: On; Write: Off; Delete: Off; C=67							
3	3	234 2019-08-26T11:35:58Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	Pf3gk6klWvy-b29HcFI8qbuOCCXKDFr	C=67	PROPERTY_VALUE_CHANGE	Read: On; Write: Off; Delete: Off; C=67	Changed properties: sysTitle						
4	4	233 2019-08-26T11:35:58Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	Pf3gk6klWvy-b29HcFI8qbuOCCXKDFr	C=67	RETENTION_CHANGE	Read: On; Write: Off; Delete: Off; C=67	Added policies: '10 years'						
5	5	232 2019-08-26T11:31:14Z	admin	192.168.80.64	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	3m9NS-NVEiGH4HFNPGuLm1bEt9BjYN	C=60	ENTITY_OPEN_READ_WRITE	Read: On; Write: Off; Delete: Off; C=60							
6	6	231 2019-08-26T09:21:38Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Updated ALLOW rights for 'turner' for attribute 'Attribut46': Read: On; Write: Off; Delete: Off; C=67								
7	7	230 2019-08-26T09:21:38Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Added ALLOW rights for 'kayla' for attribute 'ad:Editor': Read: On; Write: Off; Delete: Off; C=67								
8	8	229 2019-08-26T09:21:38Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Added DENY rights for 'sys:Owner': Read: Off; Write: Off; Delete: Off; C=67								
9	9	229 2019-08-26T09:21:38Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Updated ALLOW rights for 'mwehch': Read: On; Write: On; Delete: On; C=67								
10	10	227 2019-08-26T09:21:38Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Updated ALLOW rights for 'controlling': Read: On; Write: On; Delete: On; C=67								
11	11	226 2019-08-26T09:20:23Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Updated ALLOW rights for 'turner' for attribute 'Attribut46': Read: On; Write: Off; Delete: Off; C=67								
12	12	225 2019-08-26T09:20:23Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Updated ALLOW rights for 'kayla' for attribute 'ad:Reader': Read: On; Write: Off; Delete: Off; C=67								
13	13	224 2019-08-26T09:20:23Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Updated DENY rights for 'sys:Owner': Read: Off; Write: Off; Delete: Off; C=67								
14	14	223 2019-08-26T09:20:23Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Updated ALLOW rights for 'mwehch': Read: On; Write: On; Delete: On; C=67								
15	15	222 2019-08-26T09:20:23Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Updated ALLOW rights for 'controlling': Read: On; Write: On; Delete: On; C=67								
16	16	221 2019-08-26T09:18:33Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Updated ALLOW rights for 'turner' for attribute 'Attribut46': Read: On; Write: Off; Delete: Off; C=67								
17	17	220 2019-08-26T09:18:33Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Added DENY rights for 'sys:Owner': Read: Off; Write: Off; Delete: Off; C=67								
18	18	219 2019-08-26T09:18:33Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Updated ALLOW rights for 'mwehch': Read: On; Write: On; Delete: On; C=67								
19	19	218 2019-08-26T09:18:33Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Updated ALLOW rights for 'controlling': Read: On; Write: On; Delete: On; C=67								
20	20	217 2019-08-26T09:18:26Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Updated ALLOW rights for 'turner' for attribute 'Attribut46': Read: On; Write: Off; Delete: Off; C=67								
21	21	216 2019-08-26T09:18:26Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Added DENY rights for 'sys:Owner': Read: Off; Write: Off; Delete: Off; C=67								
22	22	215 2019-08-26T09:18:26Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Updated ALLOW rights for 'mwehch': Read: On; Write: On; Delete: On; C=67								
23	23	214 2019-08-26T09:18:26Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Updated ALLOW rights for 'controlling': Read: On; Write: On; Delete: On; C=67								
24	24	213 2019-08-26T09:18:16Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Updated ALLOW rights for 'turner' for attribute 'Attribut46': Read: On; Write: Off; Delete: Off; C=67								
25	25	212 2019-08-26T09:18:16Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Added DENY rights for 'sys:Owner': Read: Off; Write: Off; Delete: Off; C=67								
26	26	211 2019-08-26T09:18:16Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Updated ALLOW rights for 'mwehch': Read: On; Write: On; Delete: On; C=67								
27	27	210 2019-08-26T09:18:16Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Updated ALLOW rights for 'kayla': Read: On; Write: On; Delete: Off; Char								
28	28	209 2019-08-26T09:18:16Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Updated ALLOW rights for 'controlling': Read: On; Write: On; Delete: On; C=67								
29	29	208 2019-08-26T09:18:12Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Updated ALLOW rights for 'turner' for attribute 'Attribut46': Read: On; Write: Off; Delete: Off; C=67								
30	30	207 2019-08-26T09:18:12Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Added DENY rights for 'sys:Owner': Read: Off; Write: Off; Delete: Off; C=67								
31	31	206 2019-08-26T09:18:12Z	admin	192.168.50.15	Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:68.0) Firefox/68.0	7i2Pj1Qu9gyA2EivADPHHQjOqLCQvq	ACL_ENTRY_CHANGE	Updated ALLOW rights for 'mwehch': Read: On; Write: On; Delete: On; C=67								


```
<?xml version="1.0" encoding="UTF-8"?>
<auditlog-query resultset.xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns="http://www.imis.si/imisarc" xsi:schemaLocation="http://www.imis.si/imisarc http://www.imis.si/imisarc/auditlog.xsd">
  <!--
    <-Audit query sessions-->
    <session computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/76.0.3809.100 Safari/537.36" username="admin" dateTimeClosed="2019-08-26T05:41:56Z" dateTimeOpened="2019-08-26T04:38:40Z" internal_address="192.168.80.67" address="192.168.50.15" closureReason="1" isAdmin="true" IsAuditQuery="true" Id="11115"/>
    <session computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/76.0.3809.100 Safari/537.36" username="admin" dateTimeClosed="2019-08-26T06:21:56Z" dateTimeOpened="2019-08-26T05:16:43Z" internal_address="2a01:260:4086:1280:d9ff:cac:fefe:f3f3" address="192.168.50.15" closureReason="1" isAdmin="true" IsAuditQuery="true" Id="11116"/>
    <session computerName="MARKOPC" username="admin" dateTimeClosed="2019-08-26T06:24:56Z" internal_address="192.168.80.67" address="192.168.80.67" closureReason="0" isAdmin="true" IsAuditQuery="true" Id="11120"/>
    <session computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/76.0.3809.100 Safari/537.36" username="admin" dateTimeClosed="2019-08-26T06:28:54Z" dateTimeOpened="2019-08-26T06:18:26Z" internal_address="192.168.80.67" address="192.168.50.15" closureReason="1" isAdmin="true" IsAuditQuery="true" Id="11117"/>
    <session computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/76.0.3809.100 Safari/537.36" username="admin" dateTimeClosed="2019-08-26T08:31:56Z" dateTimeOpened="2019-08-26T06:29:07Z" internal_address="192.168.80.64" address="192.168.50.15" closureReason="1" isAdmin="true" IsAuditQuery="true" Id="11121"/>
    <session computerName="MARKOPC" username="admin" dateTimeClosed="2019-08-26T07:31:47Z" internal_address="192.168.80.67" address="192.168.80.67" closureReason="0" isAdmin="true" IsAuditQuery="true" Id="11126"/>
    <session computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/76.0.3809.100 Safari/537.36" username="admin" dateTimeClosed="2019-08-26T07:59:25Z" dateTimeOpened="2019-08-26T07:35:38Z" internal_address="192.168.80.64" address="192.168.50.15" closureReason="1" IsAuditQuery="true" Id="11128"/>
    <session computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/76.0.3809.100 Safari/537.36" username="admin" dateTimeClosed="2019-08-26T08:42:09Z" dateTimeOpened="2019-08-26T07:59:28Z" internal_address="192.168.80.64" address="192.168.50.15" closureReason="1" IsAuditQuery="true" Id="11131"/>
    <session computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/76.0.3809.100 Safari/537.36" username="admin" dateTimeClosed="2019-08-26T08:42:09Z" dateTimeOpened="2019-08-26T07:59:28Z" internal_address="192.168.80.64" address="192.168.50.15" closureReason="1" IsAuditQuery="true" Id="11130"/>
    <session computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/76.0.3809.100 Safari/537.36" username="admin" dateTimeClosed="2019-08-26T09:51:56Z" dateTimeOpened="2019-08-26T08:06:10Z" internal_address="2a01:260:4086:1280:d9ff:cac:fefe:f3f3" address="192.168.50.15" closureReason="1" isAdmin="true" IsAuditQuery="true"
```

4.3.8 Archiving email messages

4.3.8.1 Email archiving procedure

The user marks one or several email messages, including their attachments, in the email client (MS Outlook, HCL Notes etc.) and »drags« them to the selected class or folder in the classification scheme in the IMiS®/wClient.

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.

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.

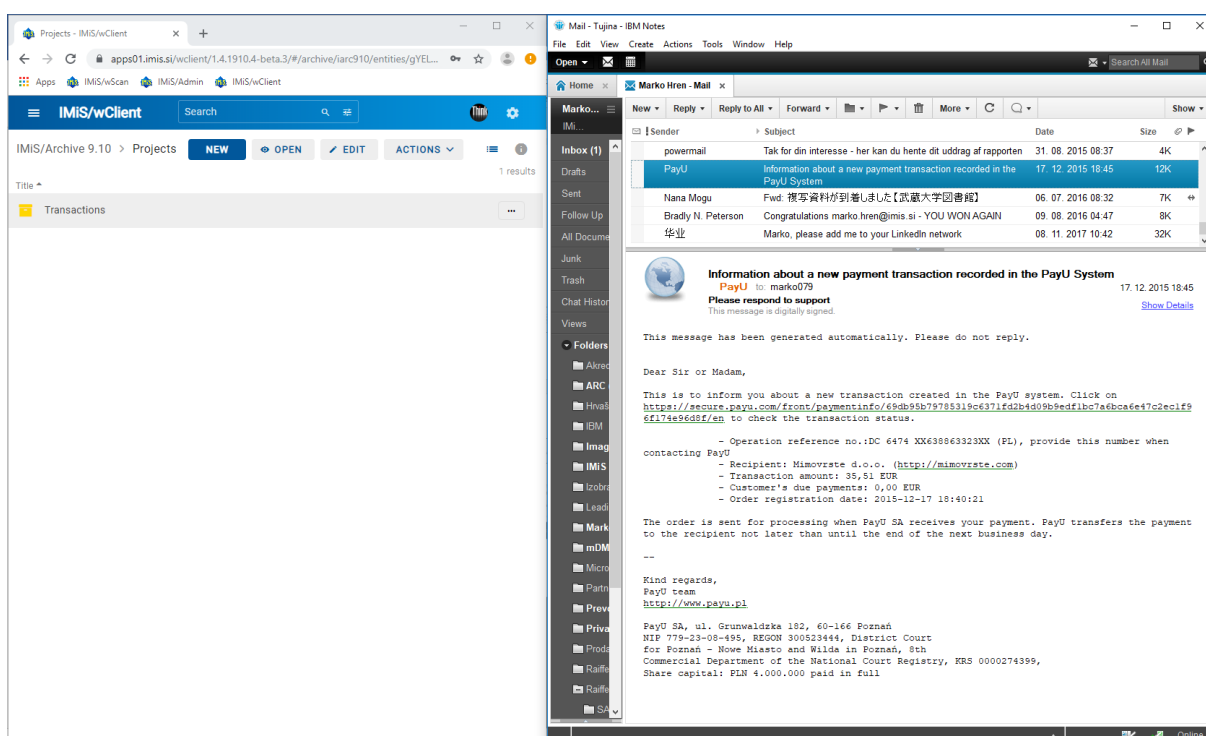


Image 220: Preparing the environment for transferring an email message from the email client to the archive

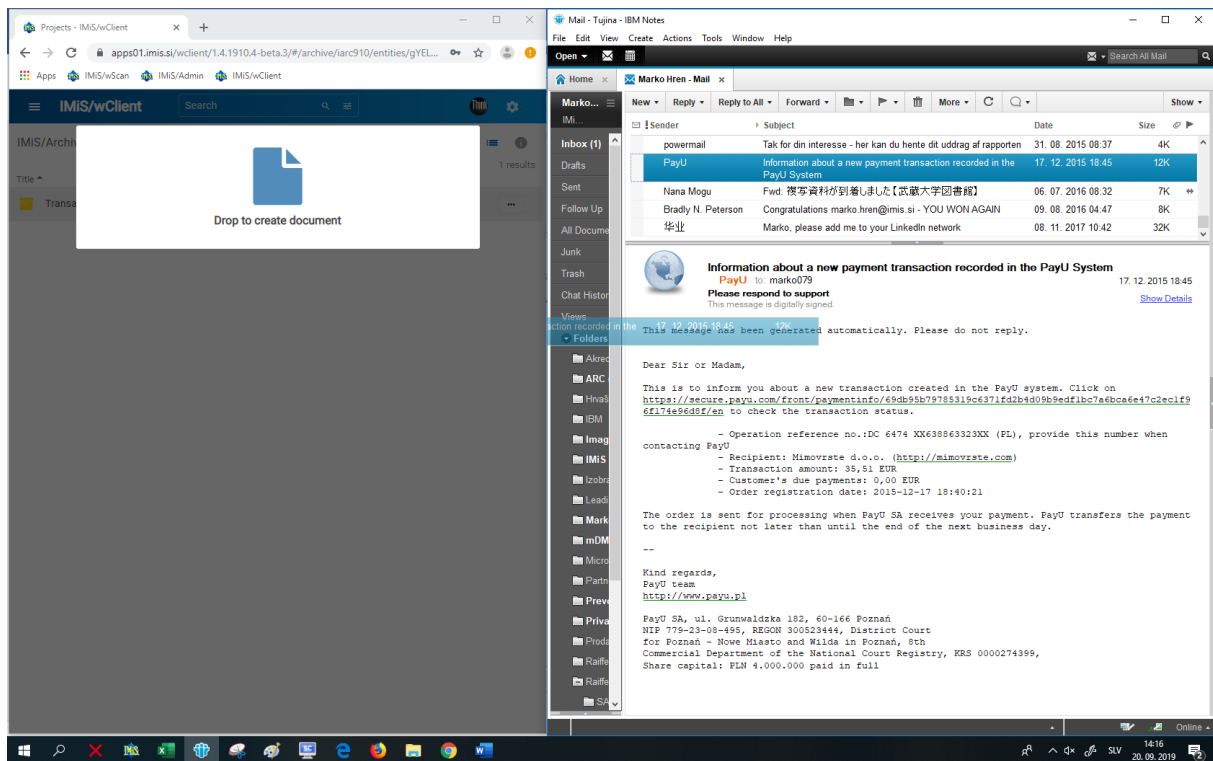


Image 221: Dropping the email message to the selected entity

After releasing the mouse button, a dialog box opens for viewing and editing the details of the email message.

Create Document

DETAILS | EMAIL | PHYSICAL PROPERTIES | SECURITY | RETENTION

Parent:

Template*:
Standalone e-mail entity

Title*:
Mandatory value for naming entity

Description:

Status:

Security class:

Significance:

Owner:

Keywords:
Important words used in entity

Categories:

Content: 1.0 kB

CREATE **CANCEL**

Image 222: Viewing and editing the details of an email message before saving

In the »Details« tab the user can view or edit the following metadata:

- 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.
- Description: Short description 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: document contents. This attribute is available only for document-type entities.
- External identifiers: a list of the entity's unique external identifiers on the server.

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. 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.

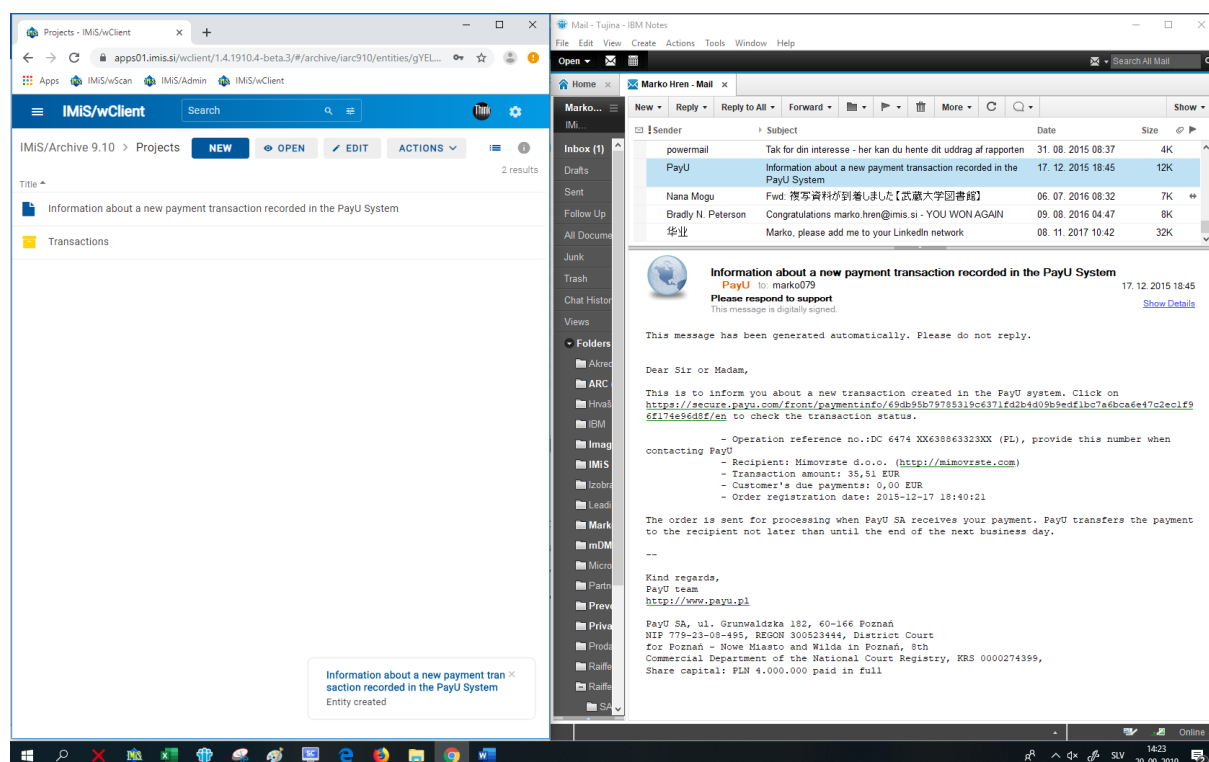


Image 223: Displaying a saved email message on the list of entities

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.

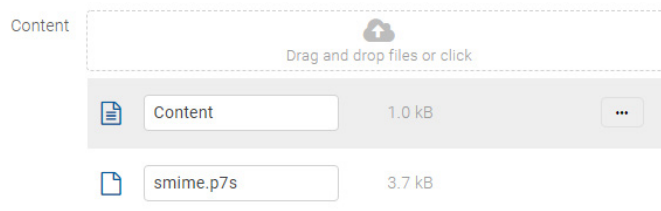


Image 224: Contents of the email message

4.3.8.2 Functionality description

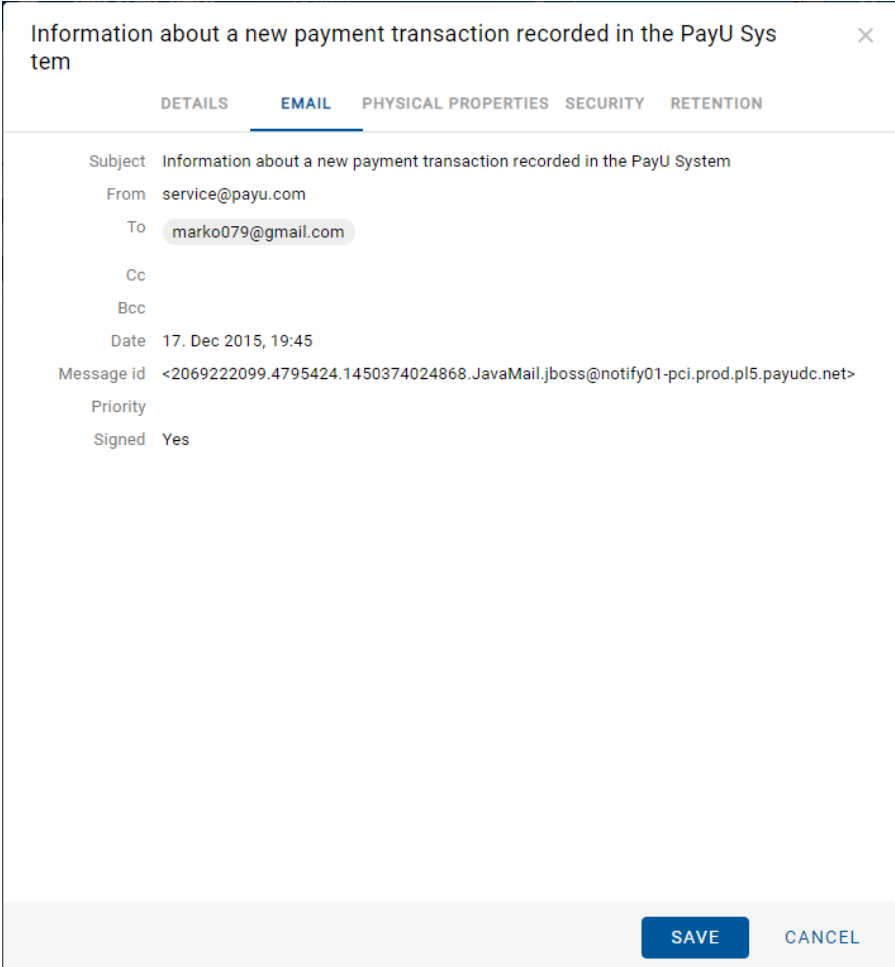
After viewing and confirming the email message with the »Create« button, the selected email messages are copied to the specified location in the classification scheme, in the form of an EML file. For each email message, the IMiS®/wClient creates a new document containing the original message, the metadata 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.



Information about a new payment transaction recorded in the PayU System

DETAILS **EMAIL** PHYSICAL PROPERTIES SECURITY RETENTION

Subject Information about a new payment transaction recorded in the PayU System

From service@payu.com

To marko079@gmail.com

Cc

Bcc

Date 17. Dec 2015, 19:45

Message id <2069222099.4795424.1450374024868.JavaMail.jboss@notify01-pci.prod.pl5.payudc.net>

Priority

Signed Yes

SAVE CANCEL

Image 225: 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 retrieve it by using the »Action« command and »Authenticity evidence« command.

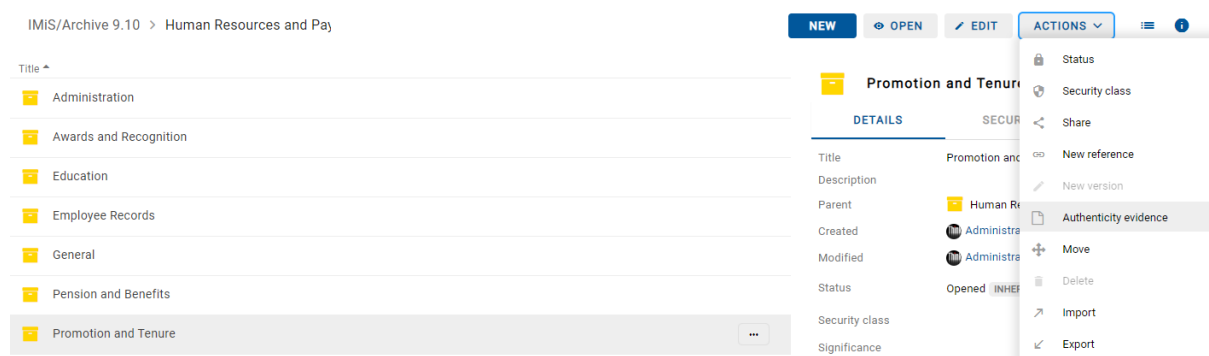



Image 226: The popup menu for selecting the »Authenticity evidence« command

The user can obtain authenticity evidence also by selecting the icon  in the set »More« of the »Details« tab in the right view.

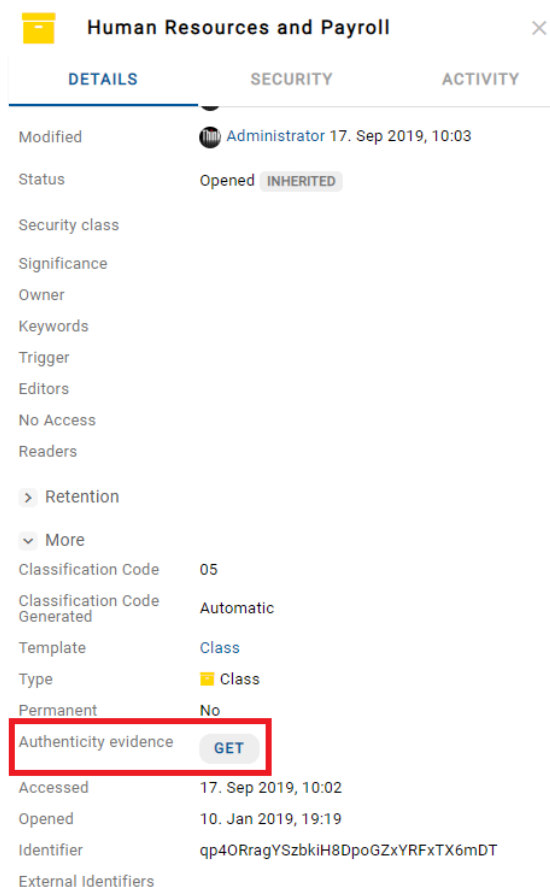


Image 227: Obtaining authenticity evidence in the »Details« tab

The notification bar in the bottom part of the user interface shows the information about saving a file with authenticity evidence.

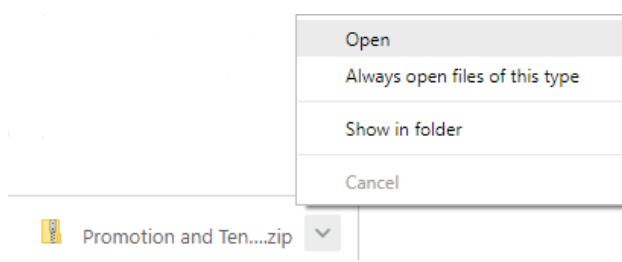


Image 228: Information for the user about saving a directory with authenticity evidence

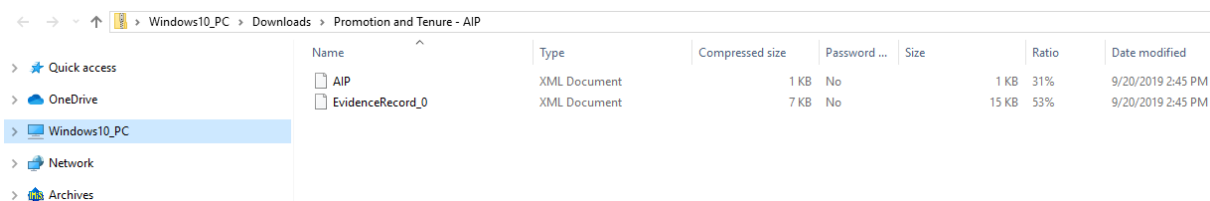


Image 229: A directory with two files containing authenticity evidence

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/xmldsig#sha256"/>
      <ds:DigestValue>ONPJp3qfSkFm...T5irpOT+SrJMp+VE=</ds:DigestValue>
    </aip:ContentValue>
  </aip:Content>
</aip:AIP>
```

Image 230: Example archive information package

```

<?xml version="1.0" encoding="UTF-8"?>
<EvidenceRecord xmlns="http://www.setcpe.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>RiHMqrrhrGATA/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>fWwSCKW04udY+/kvwMgL59scG3k=</dsig:DigestValue>
              </dsig:Reference>
              <dsig:Reference URI="#TimeStampAuthority">
                <dsig:DigestMethod Algorithm="http://www.w3.org/2000/09/xmldsig#sha1"/>
                <dsig:DigestValue>j8bwhFukHoD6jcjmzgEZtXDF/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:KeyInfo>
          <dsig:Object Id="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/Sl-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>
        </TimeStampToken>
      </TimeStamp>
    </ArchiveTimeStampChain>
  </ArchiveTimeStampSequence>
</EvidenceRecord>

```

```

</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 231: Example evidence record

4.3.10 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](#) and [IMiS®/Admin 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.

Image 232: 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.

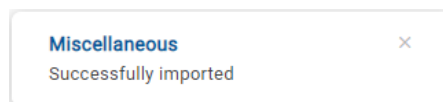


Image 233: Displaying an import notification

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.

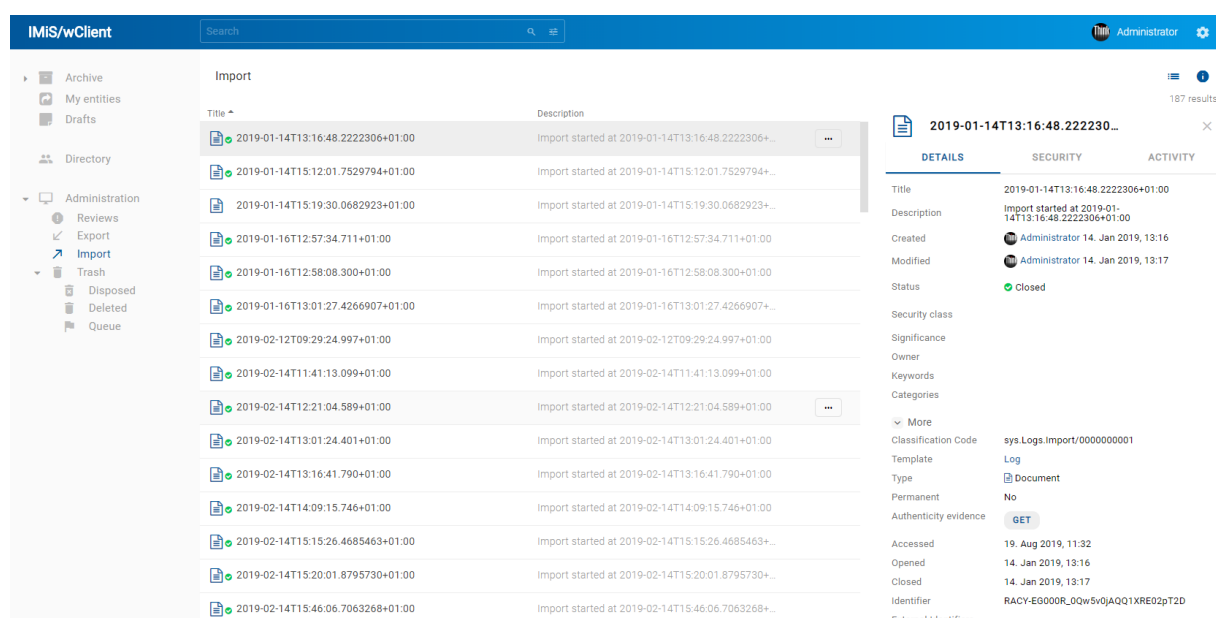


Image 234: Display of the »Import« folder in the »Administration« system folder

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.

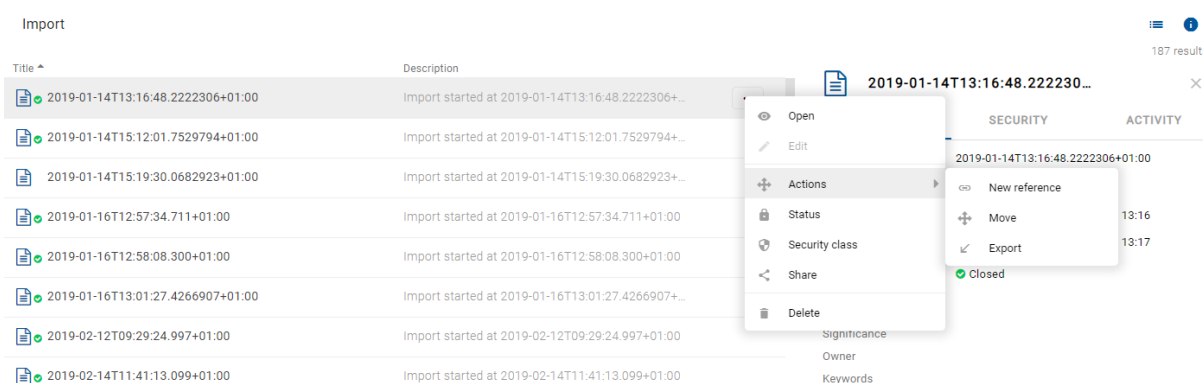


Image 235: Set of available actions on the import/export report

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](#).

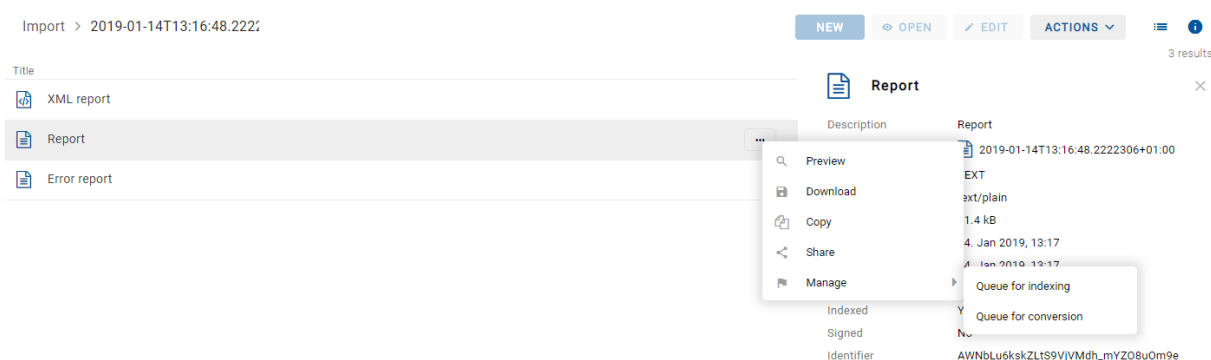


Image 236: Popup menu on a report

4.3.10.1 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.
- »ImportReport_ERROR.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.

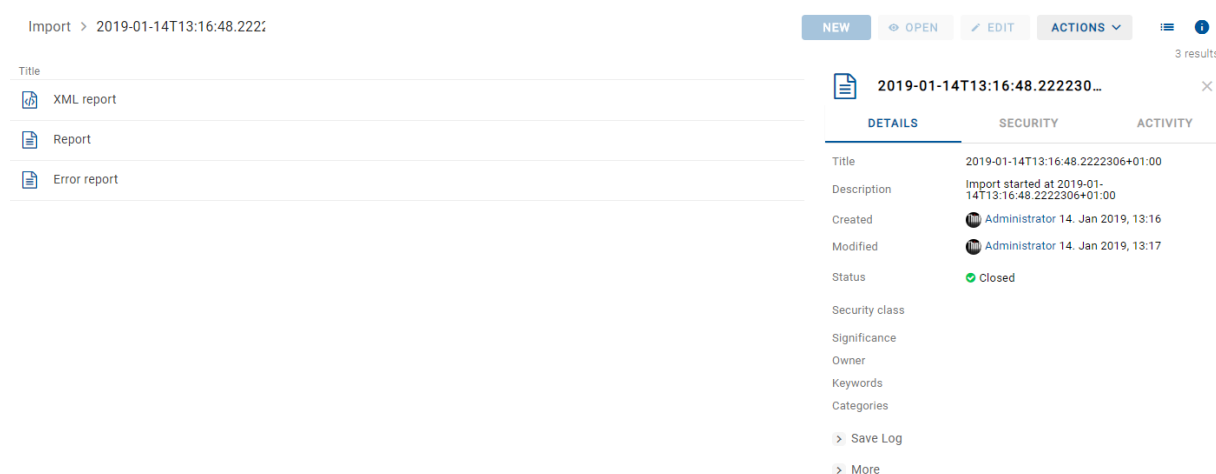


Image 237: Display of the import report in the »Import« system folder

4.3.11 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](#).

4.3.11.1 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.

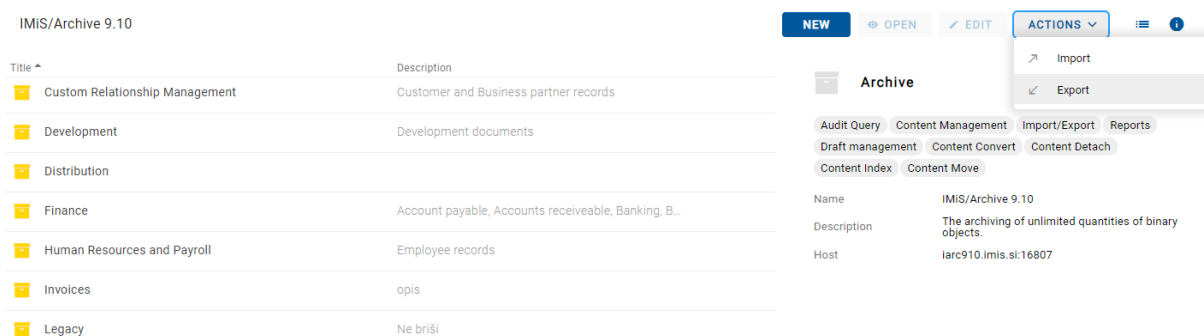


Image 238: Selecting the »Export« command at the level of the entire classification scheme

Opens a dialog box for setting the export parameters.

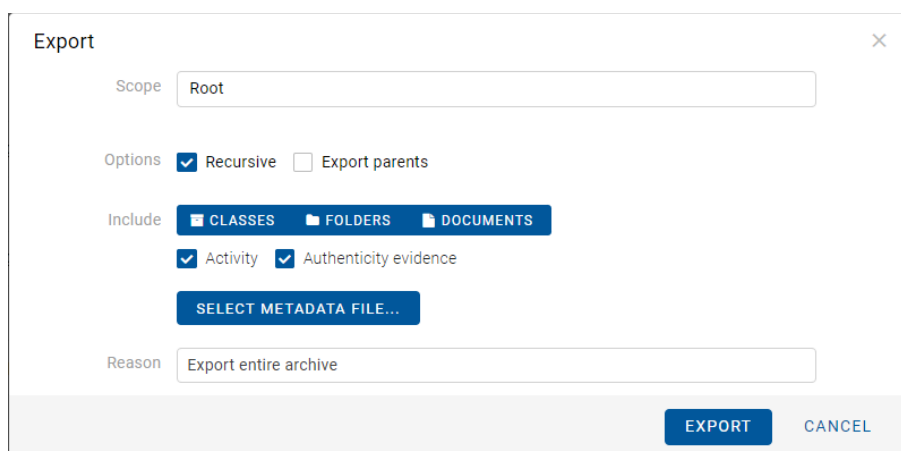


Image 239: Setting the export parameters

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).

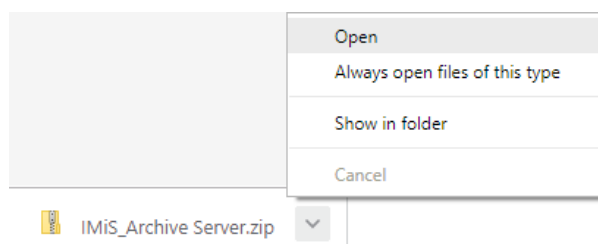


Image 240: Notification about saving a file of exported entities of the entire classification scheme

By selecting the »Open« command, export reports open for the user.

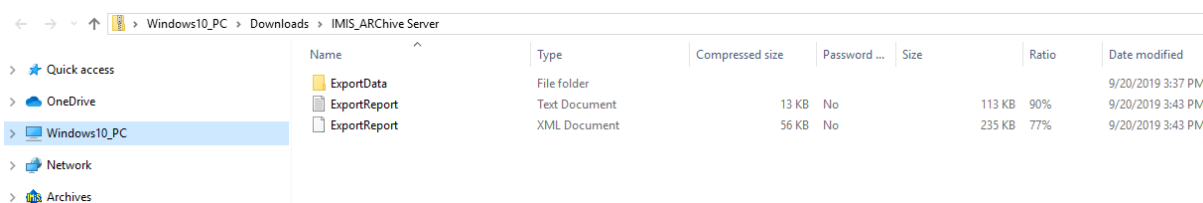


Image 241: Information about the export of the entire classification scheme

By selecting the ExportReport, the user is shown a more detailed notification about the export.

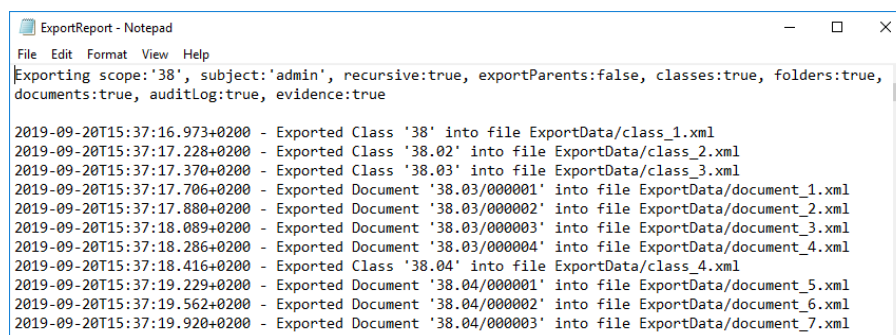


Image 242: Display of a more detailed notification about the export of the entire classification scheme

4.3.11.2 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.

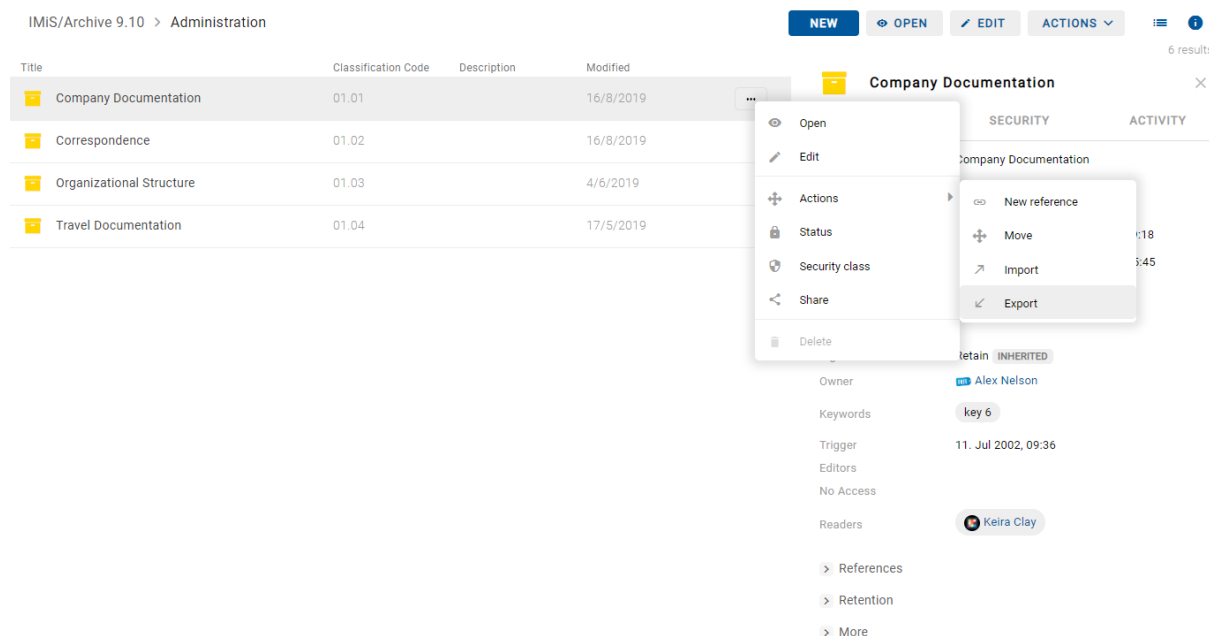


Image 243: Selecting the »Export« action

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.

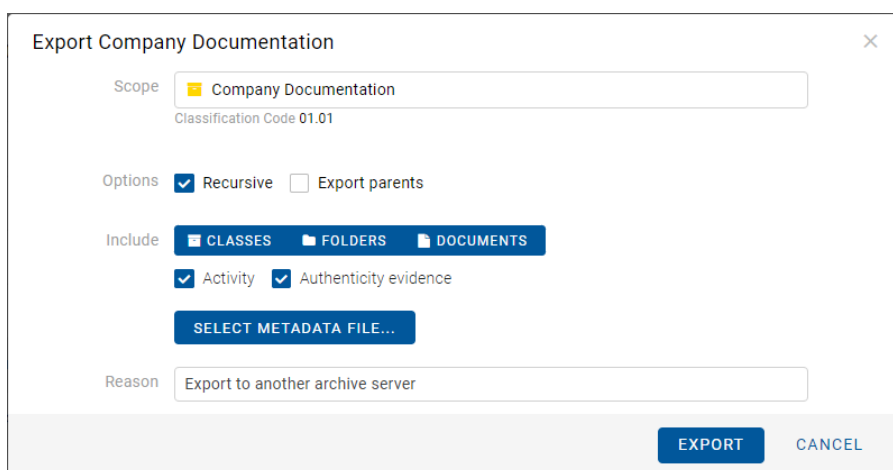


Image 244: Setting the export via a dialog box

In the »Scope« section, the user checks whether he wishes to export to the root class of the archive, or an entity currently selected in the classification scheme.

For greater clarity, the classification code of the selected entity is also available.

In the »Options« section, user can choose to additionally export:

- All the recursively contained entities – »Recursive«.
- All the parent entities – »Export parents«.

In the »Include« section, user can choose the types of entities to be included in the export:

- Classes
- Folders
- Documents.

By choosing »Audit log«, user can also export the audit log for individual exported entities.

In case authenticity evidence for the selected entity already exists on the archive, the user can include them by using the »Authenticity evidence« option.

In the section »Include metadata file« the user opens a dialog box for the selection of an XML file with the additional metadata that should 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](#).

The command »Export« begins the export procedure. The export can be cancelled using the »Cancel« command.

Export Company Documentation

Scope Company Documentation
Classification Code 01.01

Options ☒ Recursive ☐ Export parents

Include CLASSES FOLDERS DOCUMENTS
☒ Activity ☒ Authenticity evidence

[SELECT METADATA FILE...](#)

Reason Export to another archive server

[EXPORT](#) [CANCEL](#)

Image 245: Implementing the export procedure

The entities are exported in the XML 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.

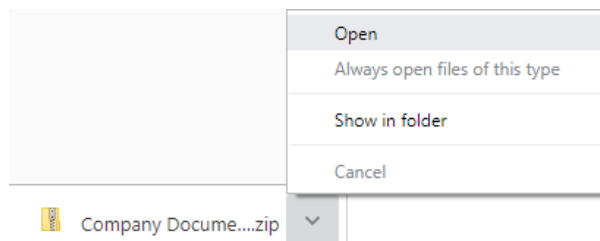


Image 246: Notification about saving a file of individual exported entities

Name	Type	Compressed size	Password ...	Size	Ratio	Date modified
ExportData	File folder					9/25/2019 8:39 AM
ExportReport	Text Document	14 KB	No	134 KB	91%	9/25/2019 8:45 AM
ExportReport	XML Document	59 KB	No	279 KB	79%	9/25/2019 8:45 AM

Image 247: Information about the export of a part of the classification scheme

Every export action from the IMiS®/ARChive Server is recorded in the »Export« folder located in the »Administration« system folder.

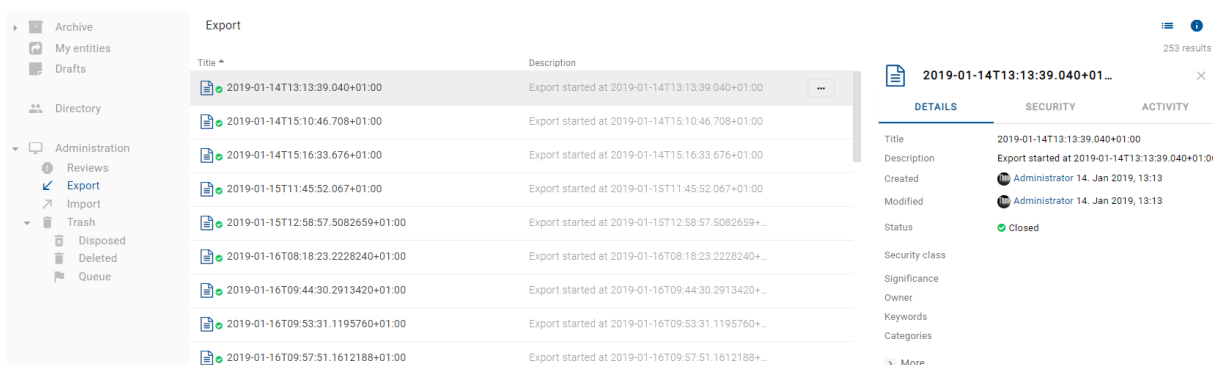


Image 248: Display of the »Export« folder in the »Administration« system folder and the document selected for export

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.

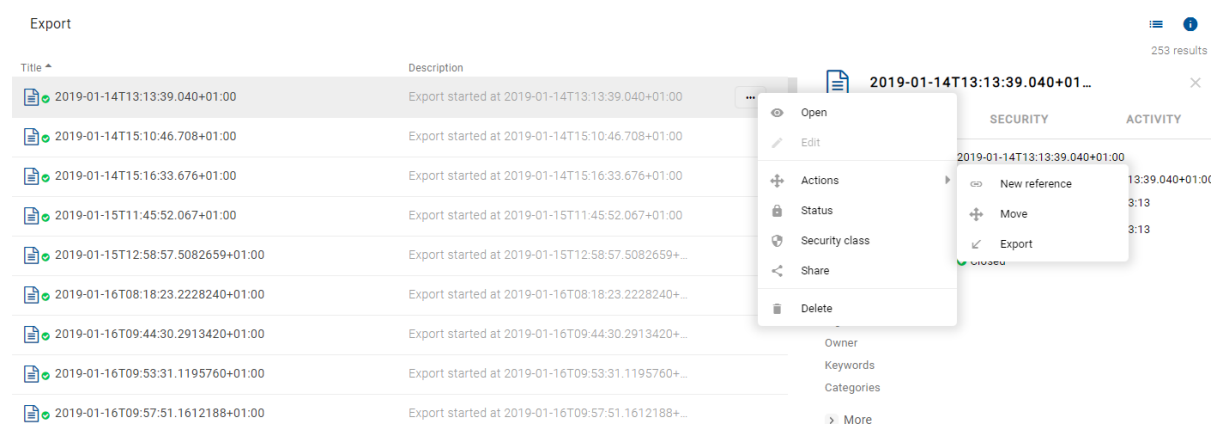


Image 249: Nabor razpoložljivih dejanj na poročilu o izvozu

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](#).

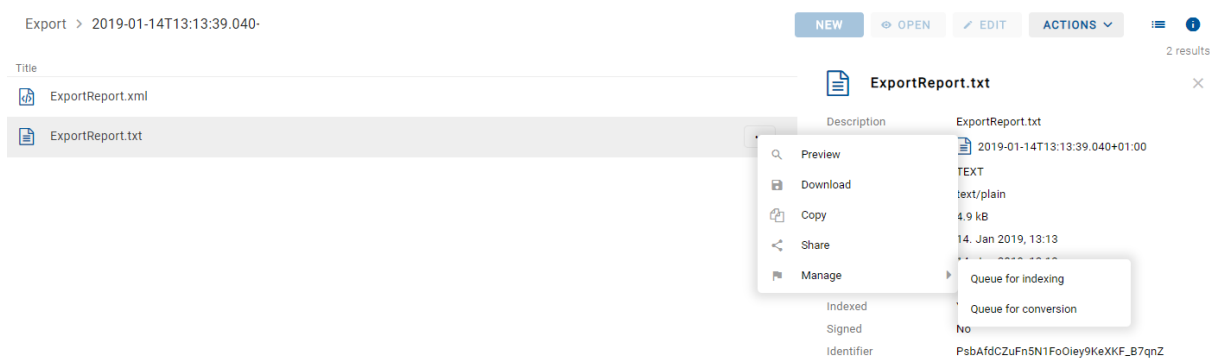


Image 250: Popup menu on the export report

4.3.11.3 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.

```
2018-08-23T13:40:03.6077245+02:00 - ERROR: Unable to export Class "07". Error "key is not is not found.".
2018-08-23T13:40:03.7442354+02:00 - ERROR: Unable to export Document "07/000001". Error "key is not is not found.".
2018-08-23T13:40:03.7852115+02:00 - ERROR: Unable to export Document "07/000002". Error "key is not is not found.".
2018-08-23T13:40:03.8311923+02:00 - ERROR: Unable to export Document "07/000005". Error "key is not is not found.".
2018-08-23T13:40:03.8681634+02:00 - ERROR: Unable to export Document "07/000006". Error "key is not is not found.".
2018-08-23T13:40:03.9061416+02:00 - ERROR: Unable to export Document "07/000007". Error "key is not is not found.".
2018-08-23T13:40:03.9431203+02:00 - ERROR: Unable to export Document "07/000008". Error "key is not is not found.".
2018-08-23T13:40:03.9781000+02:00 - ERROR: Unable to export Document "07/000009". Error "key is not is not found.".
```

Image 251: 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.

Export > 2019-01-16T10:02:01.412079...

3 results

XML report

Report

Error report

2019-01-16T10:02:01.412079...

DETAILS SECURITY ACTIVITY

Title 2019-01-16T10:02:01.4120793+01:00

Description Export started at 2019-01-16T10:02:01.4120793+01:00

Created Administrator 16. Jan 2019, 10:02

Modified Administrator 16. Jan 2019, 10:02

Status Closed

Security class

Significance

Owner

Keywords

Categories

> Save Log

> More

Image 252: Export report

By selecting the ExportReport, the user is shown a more detailed notification about the export.

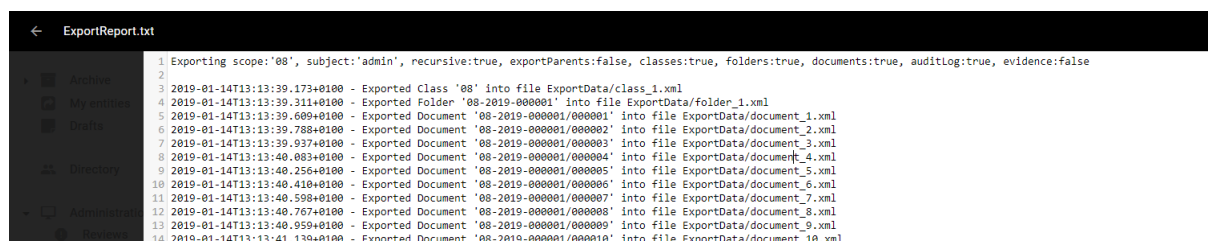


Image 253: Display of a more detailed notification about the export

***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.*

4.3.12 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).

4.3.12.1 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.

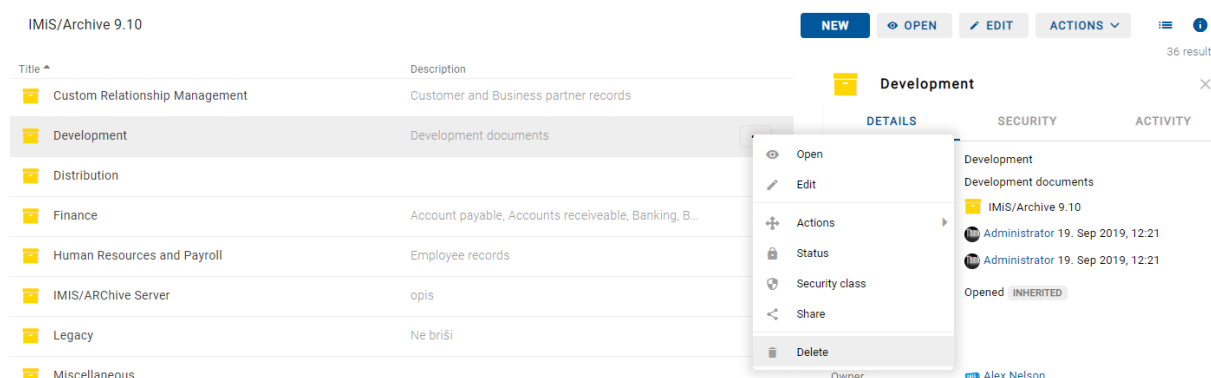


Image 254: Selecting the »Delete« command

A dialog box opens for giving the »Reason to delete« and the »Description«, which are required.

Image 255: 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.

Delete 2 entities

Entity

Classification Code

Description*

Entity

Classification Code

Description*

Reason to delete*

DELETE CANCEL

Image 256: A dialog box for deleting multiple entities

After the reason for the deletion has been entered, the command »OK«, or »Delete« in the case of deleting multiple entities, is enabled. The user can either confirm the deletion or cancel it by selecting the »Cancel« command.

4.3.12.2 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.

Administration

DETAILS SECURITY RETENTION

Template* Class Class entity

Title* Administration Mandatory value for naming entity

Description Company documentation and correspondence

Significance Delete

Owner INHERITED

Keywords None

External Identifiers Vital

Permanent

Retain

Delete

Trigger 22.06.2019 17:25

☐ Inherited

opls

Editors

Caroline Irwin John Smith Ron Salazar IT

SAVE **CANCEL**

Image 257: Marking an entity for later deletion

4.3.12.3 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.

Queue - IMiS/wClient

<https://apps01.imis.si/wclient/1.2.1810.2-beta/#/archive/iarc/trash/queue>

IMiS/wClient

Search

Archive

My entities

Drafts

Directory

Administration

Reviews

Export

Import

Trash

Disposed

Deleted

Queue

Queue

Title	Classification Code	Description	Modified
Administration	05.09	Human resource...	2/10/2018
Other	16	Verious docume...	1/10/2018

Image 258: 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.

Image 259: 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.

4.3.12.4 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.

Deleted		
Title ^	Deleted	Description
Maureen on Vacation - we have a temp	15/1/2019	3.1063613.BZ0TWU058DUH...
May 17, 200 Commission Meeting	22/2/2019	3.1102903.L45N1GX1MTFIM...
Meet with Jim, Luke and Rick re PECO	27/8/2019	3.1092442.GV5QXG1CDT11M...
Meet with Vickie and Rick EB653 (Re: Regula...	16/1/2019	3.1120739.FGYMFNPWKES...
Meeting w/Skilling, McDonald & Buy - EB4903	2/4/2019	.
Meeting w/Skilling, McDonald & Buy - EB4903	2/4/2019	.

Mtg. re buildir

VIEW MODE

☒ List
 ☐ Grid

VIEW

☒ Classification Code
 ☒ Deleted
 ☒ Description

DETAILS

Title

Description

Reason

Deleted

Classification Code

Identifier

Mtg. re buildir

3.1102903.L45N1GX1MTFIM...

.

ADMINISTRATOR 10 Jan 2019, 11:04

09.05-2019-000002/000007

-d96llyez5bBQm6mdrulywffCCX9MDpy

Image 260: 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.
IncludeInAIP	Attribute values are part of the archive information package.
Full text indexed	Attribute values are indexed.

Table 6: 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	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. The possible values are: <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><u>Warning:</u> 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

Table 7: 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 8: 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 9: 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 10: 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 11: 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 12: 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 13: 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	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.
Query	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.

Table 14: 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 15: 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 sign 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.

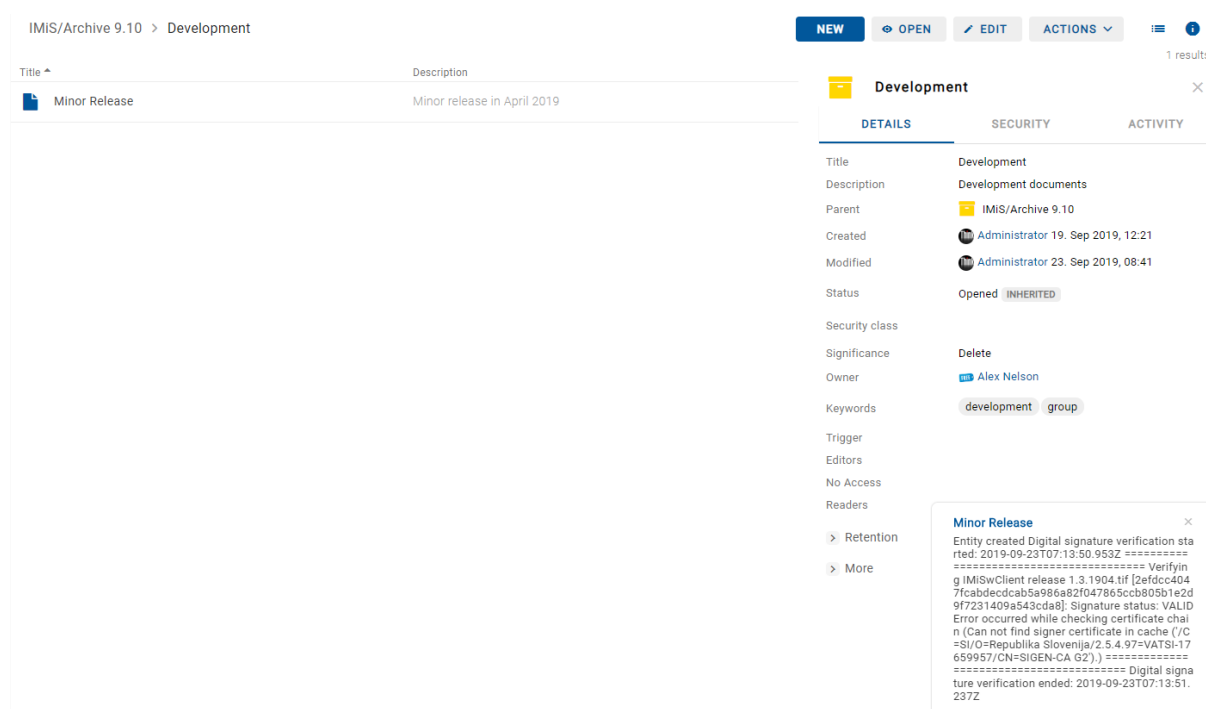


Image 261: Popup window containing the result of the document's electronic signature verification.

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.

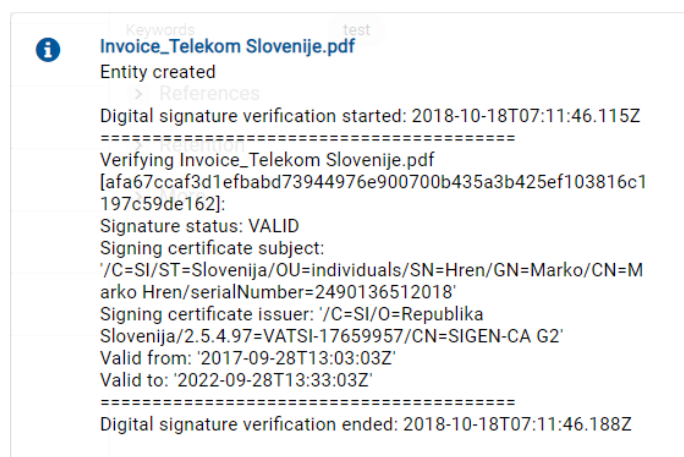


Image 262: Example of a report for a valid electronic signature and valid digital certificate

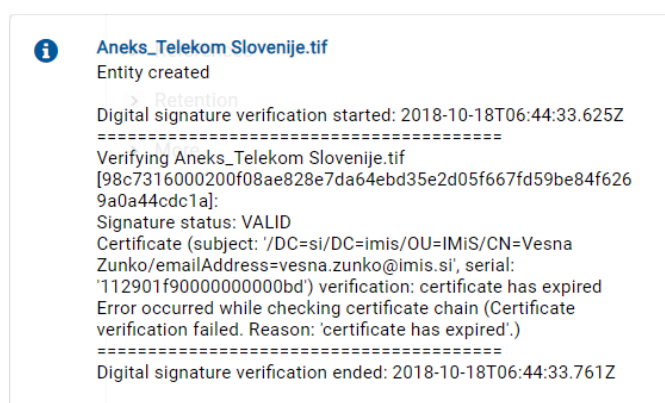


Image 263: Example of a valid electronic signature and an expired digital certificate

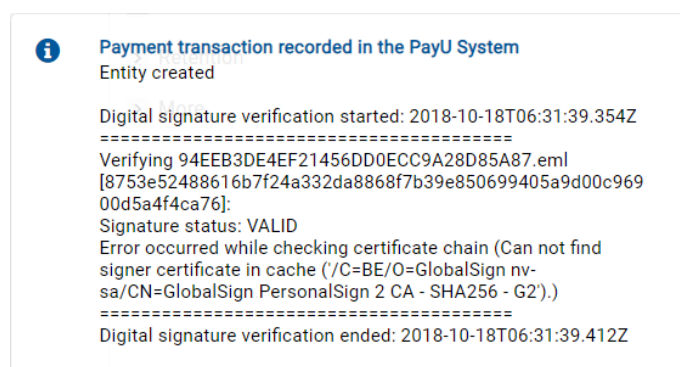


Image 264: Example of a valid electronic signature for which the certification authority could not be verified.

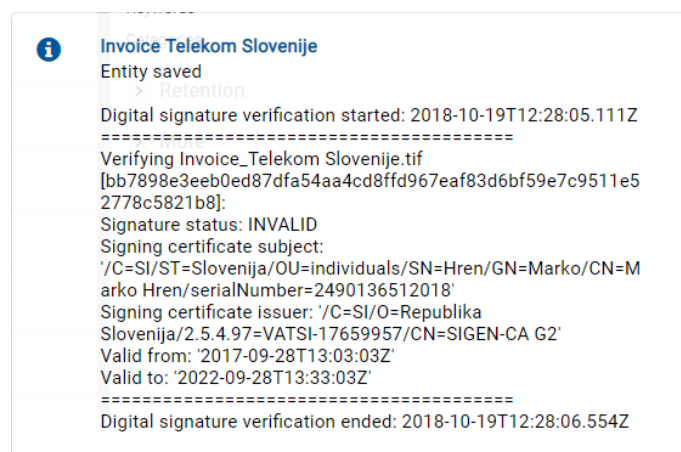


Image 265: Example of an invalid electronic signature due to a modification of the document after signing.

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.

All activities in the review process are implemented in the »Reviews« folder, classified under the »Administration« system folder.

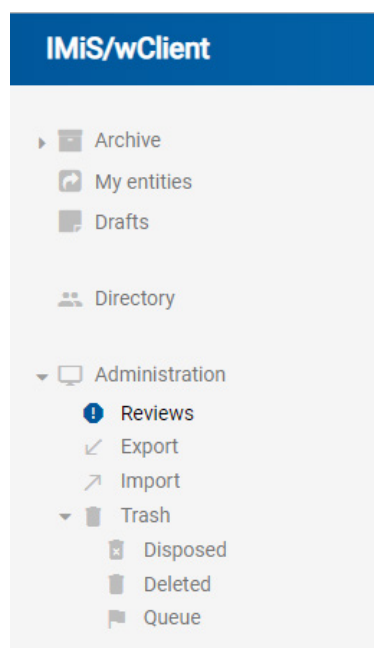


Image 266: The »Reviews« folder in the left view

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.

Reviews

Title	Description	Modified
Review P4 July 2019	Ad-hoc Review [owner=anelso...	23/9/2019
Review A8 June 2019	10-years Regular Review with ...	23/9/2019
Review 2-years D6 May 2019	2-years Regular Review	23/9/2019
Review K12 April 2019	3-years Regular Review	23/9/2019
Review G-3 March 2019	10-years Regular review G3	23/9/2019

Archive

Audit Query Content Management Import/Export Reports
 Draft management Content Convert Content Detach
 Content Index Content Move

Name IMIS/Archive 9.10
 Description The archiving of unlimited quantities of binary objects.
 Host iarc910.imis.si:16807

Image 267: 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.

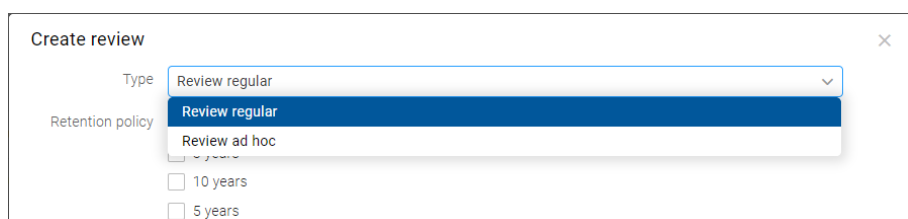


Image 268: Selecting the review type

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.

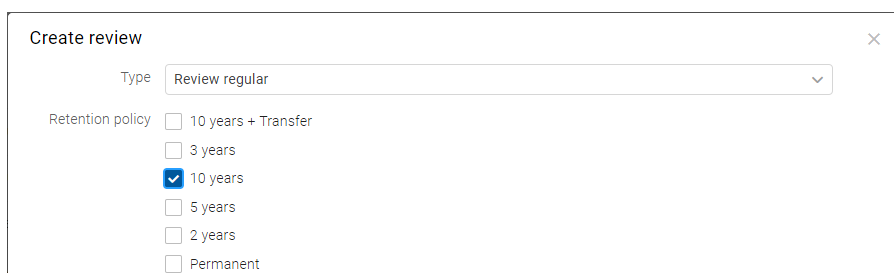


Image 269: Creating a new »Regular review« in the preparation phase

- »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.

Review A8 June 2019

DETAILS SECURITY

Title* Review A8 June 2019

Description 10-years Regular Review with Transfer

Owner Alex Nelson

Keywords regular x 10years x

Members* Jerry x Roger x Albert x

Comments A8 division review

Reason

SAVE CANCEL

Image 270: Display of 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](#).

Review A8 June 2019

DETAILS **SECURITY**

Permissions Entity

Search	Permission	Effective	ALLOW	DENY
Board	Full access		ALLOW	DENY
Controlling	Read	✓	ALLOW	DENY
Everyone	Write	✓	ALLOW	DENY
Grace Layton	Move		ALLOW	DENY
Jerry Turner	Delete		ALLOW	DENY
John Smith	Create entities		ALLOW	DENY
	Change permissions		ALLOW	DENY
	Change security class		ALLOW	DENY

SAVE CANCEL

Image 271: Access permissions for review in the »Security« tab

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 272: 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 273: 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«.

The screenshot displays the 'Reviews' section of the IMiS®/wClient interface. On the left, a table lists several reviews with columns for Title, Description, and Modified date. The selected review is 'Review U9 August 2019'. On the right, a detailed view of this review is shown, including its title, creation and modification dates, description, status (Closed), owner (Alex Nelson), keywords (adhoc, owner), state (Failed), and a message indicating an error in locating the metadata attribute 'sys.owner'.

Title	Description	Modified
Review U9 August 2019	Ad-hoc Review [owner=anelso...	23/9/2019
Review A8 June 2019	10-years Regular Review with ...	23/9/2019
Review P4 July 2019	Ad-hoc Review [owner=anelso...	23/9/2019
Review 2-years D6 May 2019	2-years Regular Review	23/9/2019
Review K12 April 2019	3-years Regular Review	23/9/2019
Review G-3 March 2019	10-years Regular review G3	23/9/2019

Review U9 August 2019

DETAILS	SECURITY	ACTIVITY
Title	Review U9 August 2019	
Created	Administrator 23. Sep 2019, 10:57	
Modified	Administrator 23. Sep 2019, 10:57	
Description	Ad-hoc Review [owner=anelson]	
Status	Closed	
Owner	Alex Nelson	
Keywords	adhoc owner	
State	Failed	
Message	Unable to locate metadata attribute named 'sys.owner'.	
Identifier	LAzLt365apxgWLWdbiescqg7C8ZEnpSJ	

Image 274: 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.

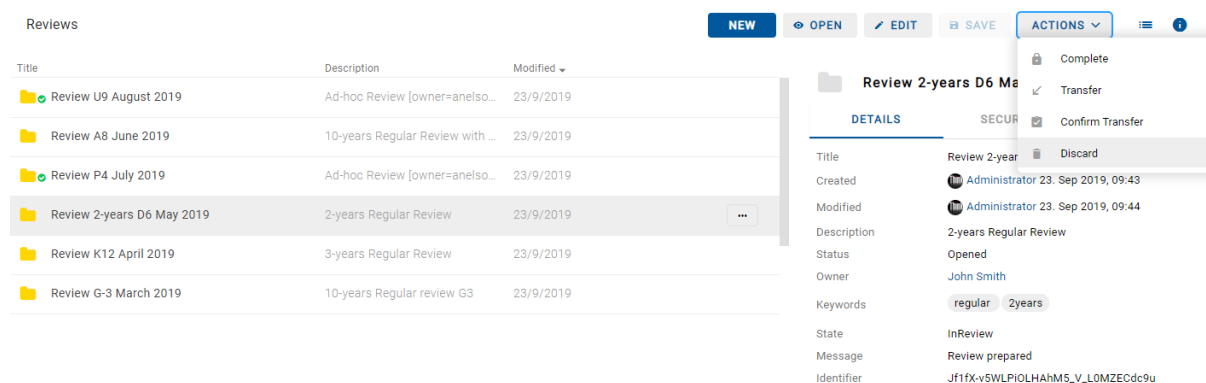


Image 275: Cancellation of the review process using the »Discard« command

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.

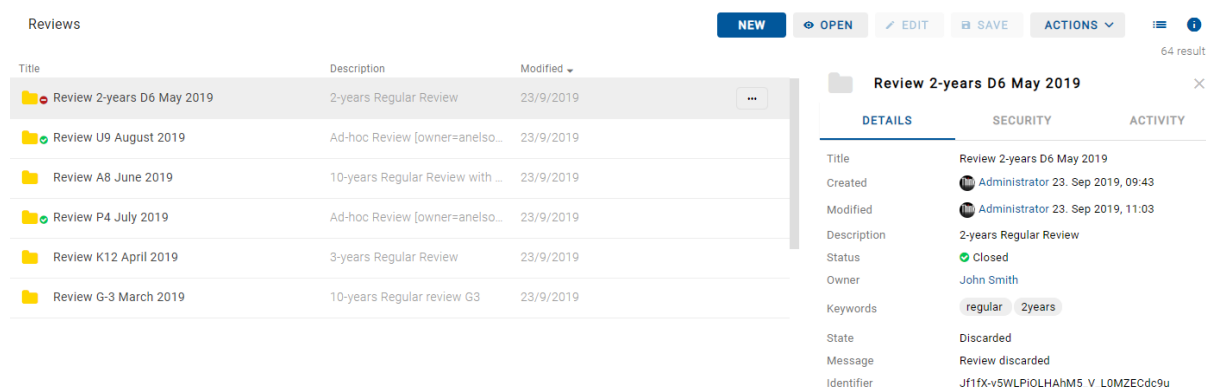


Image 276: A canceled decision-making phase

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.

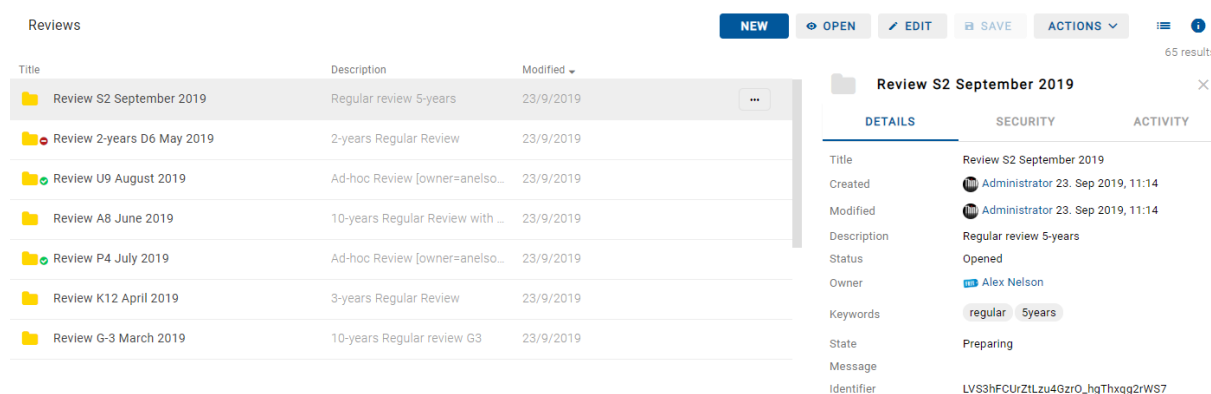


Image 277: Display of the review in the preparation phase in the »Preparing« state

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.

The screenshot displays the 'Reviews' section of the IMiS/wClient interface. On the left, a table lists several reviews. The review 'Review U9 August 2019' is selected, and its details are shown on the right. The details panel includes fields for Title, Created, Modified, Description, Status, Owner, Keywords, State, Message, and Identifier. The 'State' field shows 'Failed' with a message: 'Unable to locate metadata attribute named 'sys:owner''. The 'Identifier' field shows a long alphanumeric string.

Title	Description	Modified
Review 2-years D6 May 2019	2-years Regular Review	23/9/2019
Review U9 August 2019	Ad-hoc Review [owner=anelso...	23/9/2019
Review A8 June 2019	10-years Regular Review with ...	23/9/2019
Review P4 July 2019	Ad-hoc Review [owner=anelso...	23/9/2019
Review K12 April 2019	3-years Regular Review	23/9/2019
Review G-3 March 2019	10-years Regular review G3	23/9/2019

Review U9 August 2019	
DETAILS	SECURITY
Title	Review U9 August 2019
Created	Administrator 23. Sep 2019, 10:57
Modified	Administrator 23. Sep 2019, 10:57
Description	Ad-hoc Review [owner=anelson]
Status	Closed
Owner	Alex Nelson
Keywords	ad hoc owner
State	Failed
Message	Unable to locate metadata attribute named 'sys:owner'.
Identifier	LAzLT1365pxgWLWdblescg7C9ZEnpSJ

Image 278: 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.

The screenshot displays the 'Reviews' section of the IMiS/wClient interface. On the left, a table lists several reviews. The review 'Review S2 September 2019' is selected, and its details are shown on the right. The details panel includes fields for Title, Created, Modified, Description, Status, Owner, Keywords, State, Message, Members, and Identifier. The 'State' field shows 'InReview' with a message: 'Review prepared'. The 'Members' field shows 'Jerry', 'Roger', and 'Albert'. The 'Identifier' field shows a long alphanumeric string.

Title	Description	Modified
S2 Decisions document	Regular review S2 Decisions d...	23/9/2019
Decisions - Page 1		23/9/2019

Review S2 September 2019	
DETAILS	SECURITY
Title	Review S2 September 2019
Created	Administrator 23. Sep 2019, 11:14
Modified	Administrator 23. Sep 2019, 11:16
Description	Regular review 5-years
Status	Opened
Owner	Alex Nelson
Keywords	regular 5years
State	InReview
Message	Review prepared
Members	Jerry Roger Albert
Identifier	LV53hFCUzTLzu4GzrO_hgThxqg2rWS7

Image 279: 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.

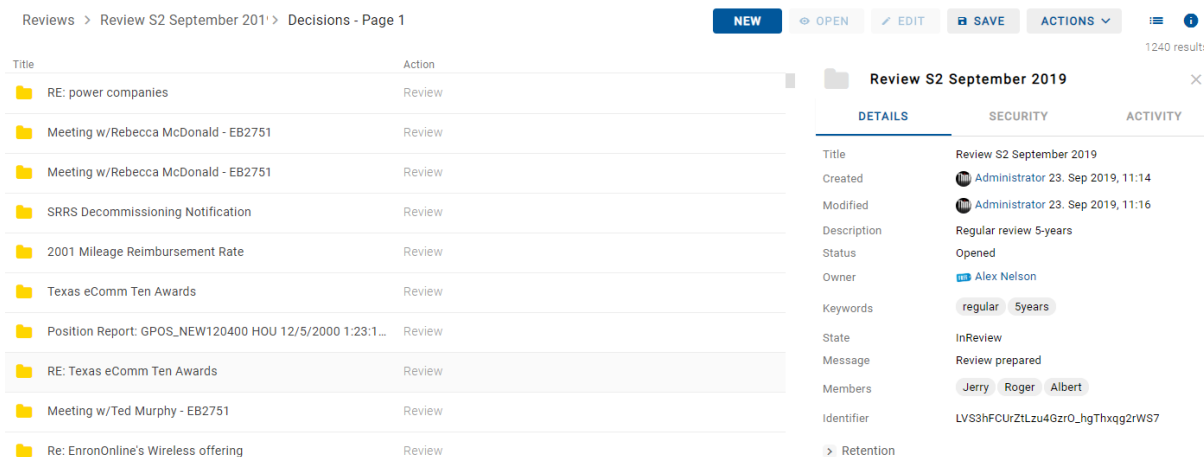



Image 280: A list of selected entities on a specific review page

By selecting the icon  to the right of the 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: »Action«, »Reason« and »Comment«.

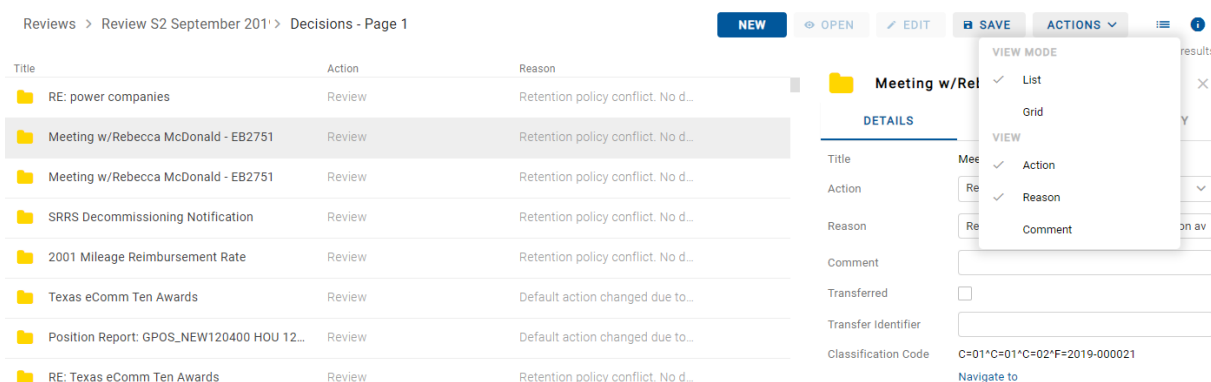


Image 281: Defining the columns of selected attributes in the popup menu

An entity which is included on the list of an individual review page 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 the right view, the selected entity is shown in the classification scheme.

The user can return to the review by selecting the back arrow in the browser.

Classification Code C=01^C=01^C=02^F=2019-000021

[Navigate to](#)

Image 282: 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
Title	Meeting w/Rebecca McDonald - EB2751
Action	Review
Reason	Retention policy conflict. No default reason av
Comment	
Transferred	<input type="checkbox"/>
Transfer Identifier	
Classification Code	C=01^C=01^C=02^F=2019-000021 Navigate to

Image 283: 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:

- »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.

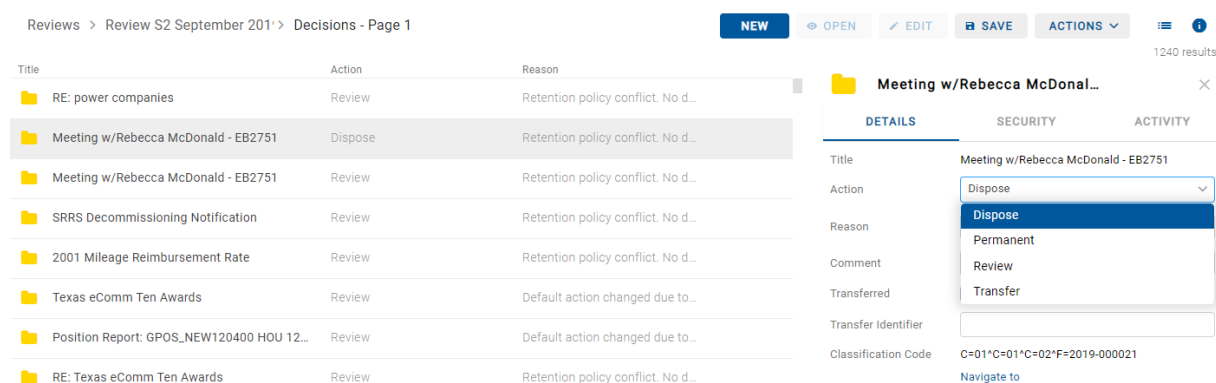


Image 284: Modifying the action of an entity in editing mode

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.

Image 285: 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](#).

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.

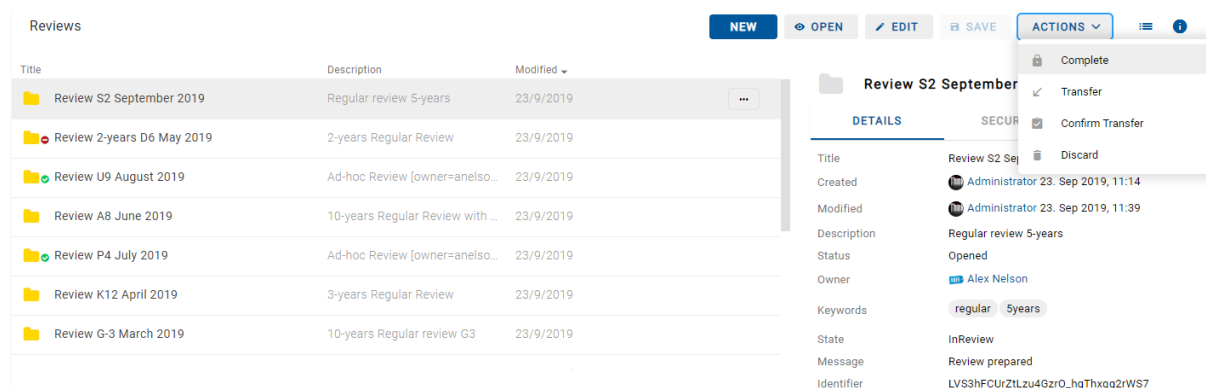


Image 286: Starting the process of completing the review

IMiS®/ARChive Server implements the review process of the disposition, transfer and permanent retention of entities.

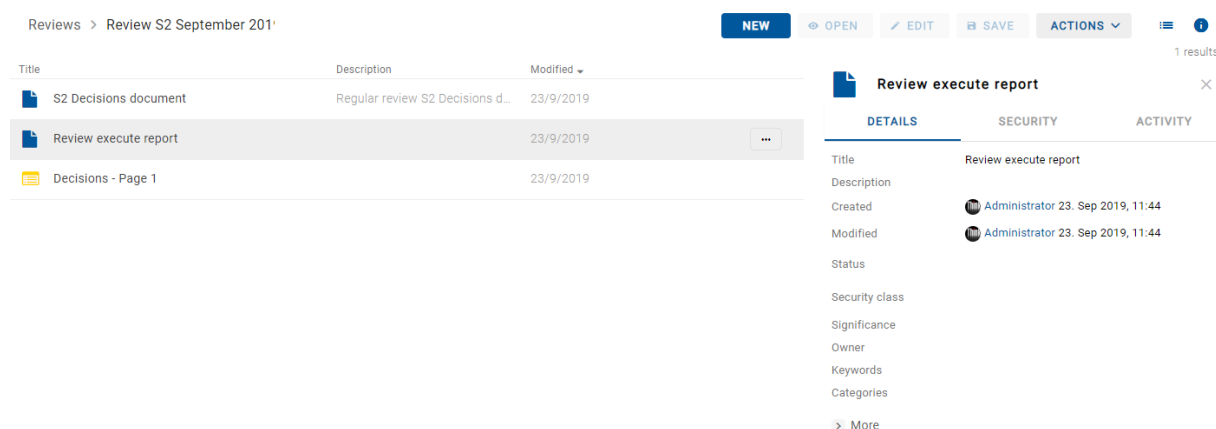


Image 287: During the process of completing the review

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](#).

Reviews > Review S2 September 2019

NEW OPEN EDIT SAVE ACTIONS 1 results

Title	Description	Modified
S2 Decisions document	Regular review S2 Decisions d...	23/9/2019
Review execute report		23/9/2019
Decisions - Page 1		23/9/2019

Review execute report

DETAILS SECURITY ACTIVITY

Title: Review execute report

Description:

Created: Administrator 23. Sep 2019, 11:44

Modified: Administrator 23. Sep 2019, 11:44

Status:

Security class:

Significance:

Owner:

Keywords:

Categories:

More

Image 288: 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 »State« attribute to »Completed«.

Reviews

NEW OPEN EDIT SAVE ACTIONS 65 results

Title	Description	Modified
Review S2 September 2019	Regular review 5-years	23/9/2019
Review 2-years D6 May 2019	2-years Regular Review	23/9/2019
Review U9 August 2019	Ad-hoc Review [owner=anelso...	23/9/2019
Review A8 June 2019	10-years Regular Review with ...	23/9/2019
Review P4 July 2019	Ad-hoc Review [owner=anelso...	23/9/2019
Review K12 April 2019	3-years Regular Review	23/9/2019
Review G-3 March 2019	10-years Regular review G3	23/9/2019
Transfer review test		23/9/2019

Review S2 September 2019

DETAILS SECURITY ACTIVITY

Title: Review S2 September 2019

Created: Administrator 23. Sep 2019, 11:14

Modified: Administrator 23. Sep 2019, 11:44

Description: Regular review 5-years

Status: Closed

Owner: Alex Nelson

Keywords: regular 5years

State: Completed

Message: Review item action execution completed

Identifier: LVS3hFCUrZtLzu4GzrO_hgThxqg2rWS7

Image 289: Review completed

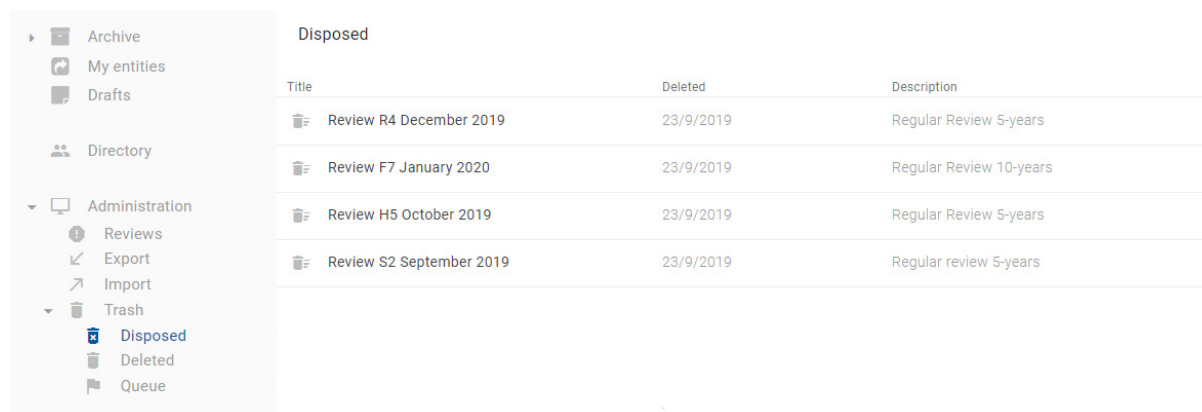
In the event of an error during the review process:

- 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.

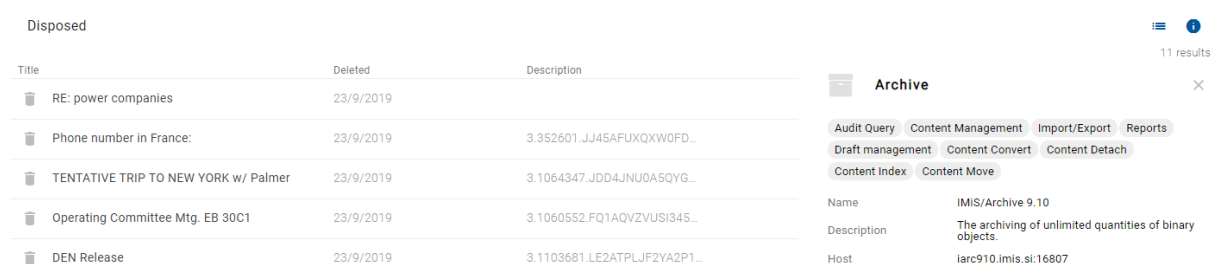


Disposed		
Title	Deleted	Description
Review R4 December 2019	23/9/2019	Regular Review 5-years
Review F7 January 2020	23/9/2019	Regular Review 10-years
Review H5 October 2019	23/9/2019	Regular Review 5-years
Review S2 September 2019	23/9/2019	Regular review 5-years

Image 290: A list of 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.
- Description: a description of the disposed entity.
- Modified: the date of last change.



Disposed		
Title	Deleted	Description
RE: power companies	23/9/2019	
Phone number in France:	23/9/2019	3.352601.JJ45AFUXQXW0FD...
TENTATIVE TRIP TO NEW YORK w/ Palmer	23/9/2019	3.1064347.JDD4JNU0A5QYG...
Operating Committee Mtg. EB 30C1	23/9/2019	3.1060552.FQ1AQVZVUSI345...
DEN Release	23/9/2019	3.1103681.LE2ATPLJF2YA2P1...

Archive
11 results

Audit Query Content Management Import/Export Reports
 Draft management Content Convert Content Detach
 Content Index Content Move

Name	IMIS/Archive 9.10
Description	The archiving of unlimited quantities of binary objects.
Host	larc910.imis.si:16807

Image 291: Display of the 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.

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.

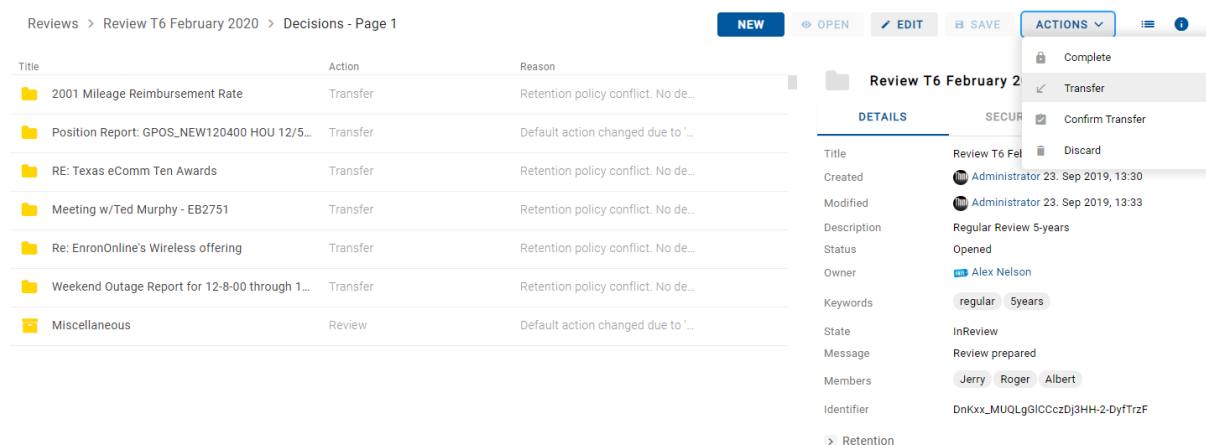


Image 292: Transfer of entities in the review process

After selecting the command, the user is shown a dialog box for setting the transfer parameters.

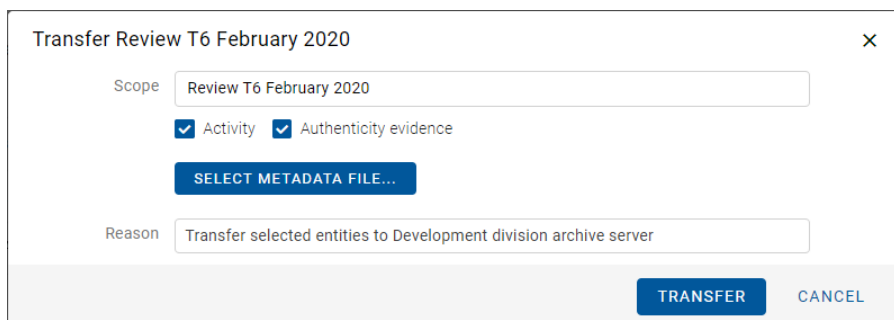


Image 293: Setting the transfer parameters

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.

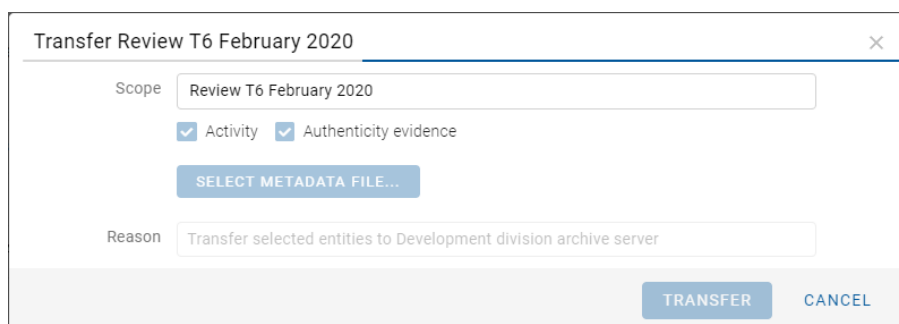


Image 294: Implementing the transfer process

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« in the popup menu.

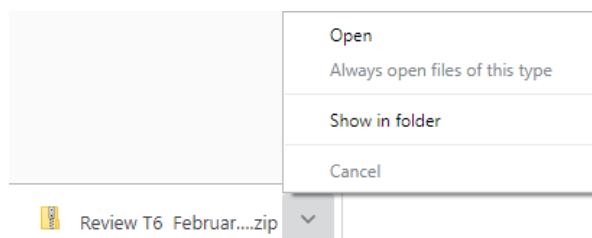


Image 295: Transfer notification

After confirming the selection »Open« 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](#).

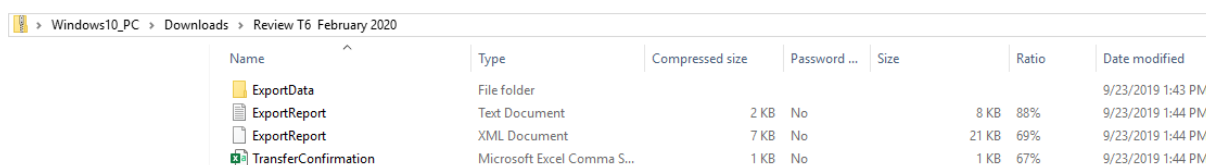


Image 296: Selecting the confirmation file

By selecting the confirmation file »TransferConfirmation«, information about the entities to be transferred is displayed.

	A	B	C
1	ClassificationCode	Transferred	ReferenceId
2	C=01^C=01^C=02^F=2019-000026	FALSE	
3	C=01^C=01^C=02^F=2019-000036	FALSE	
4	C=01^C=01^C=02^F=2019-000037	FALSE	
5	C=01^C=01^C=02^F=2019-000041	FALSE	
6	C=01^C=01^C=02^F=2019-000050	FALSE	
7	C=01^C=01^C=02^F=2019-000054	FALSE	
8			

Image 297: 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
ClassificationCode	Transferred	ReferenceId
C=01^C=01^C=02^F=2019-000026	TRUE	64632738
C=01^C=01^C=02^F=2019-000036	TRUE	64632738
C=01^C=01^C=02^F=2019-000037	TRUE	64632738
C=01^C=01^C=02^F=2019-000041	TRUE	64632738
C=01^C=01^C=02^F=2019-000050	TRUE	64632738
C=01^C=01^C=02^F=2019-000054	TRUE	64632738

Image 298: 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«.

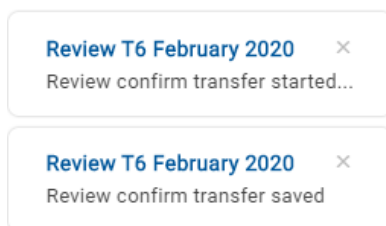


Image 299: Notification of saving the confirmation file

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.

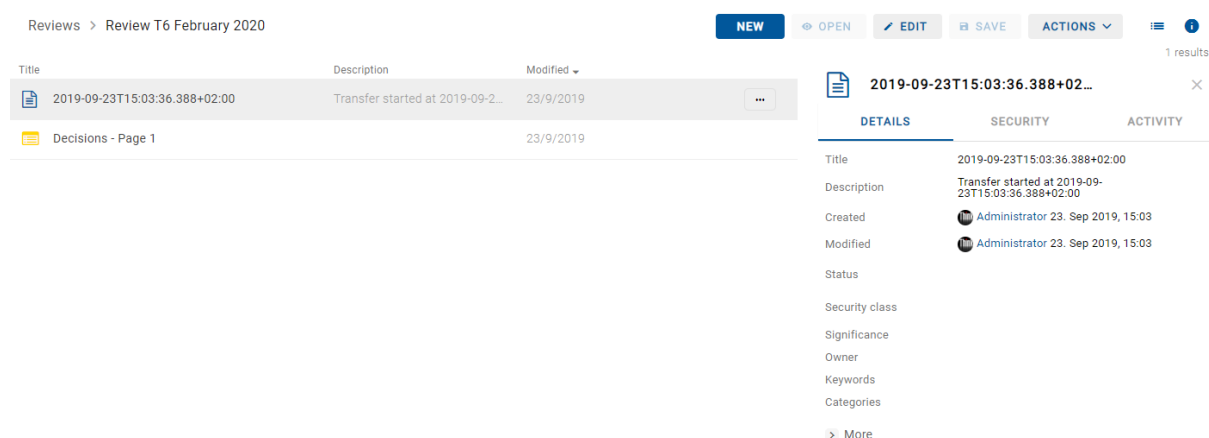


Image 300: A report on the transfer between review entities

The transfer report contains the following log files:

- XML report
- Report
- Error report, if an error occurred.

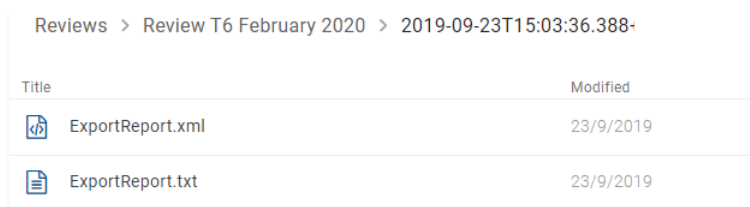


Image 301: Log files in the transfer report

By selecting the log file »ExportReport.txt«, the user is shown a report on successfully/unsuccessfully exported entities.

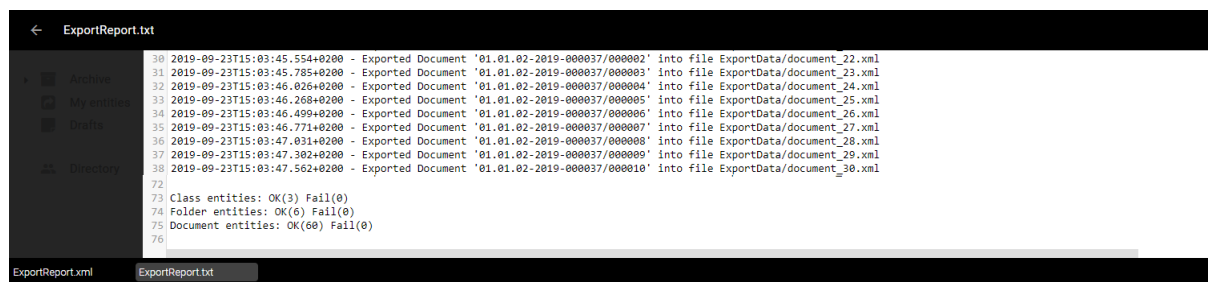


Image 302: An example of an »ExportReport.txt« report

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](#).

Reviews > Review T6 February 2020 > Decisions - Page 1

1235 results

Title	Action	Reason
2001 Mileage Reimbursement Rate	Transfer	Retention policy conflict. No d...
Position Report: GPOS_NEW120400 HOU 12...	Transfer	Default action changed due to...
RE: Texas eComm Ten Awards	Transfer	Retention policy conflict. No d...
Meeting w/Ted Murphy - EB2751	Transfer	Retention policy conflict. No d...
Re: EnronOnline's Wireless offering	Transfer	Retention policy conflict. No d...
Weekend Outage Report for 12-8-00 through ...	Transfer	Retention policy conflict. No d...
Miscellaneous	Transfer	Transfer entities to another ar...

Miscellaneous

DETAILS SECURITY ACTIVITY

Title: Miscellaneous

Action:

Reason:

Comment:

Transferred: ☒

Transfer Identifier:

Classification Code: C=07

Navigate to

Image 303: 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 id« 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.

Reviews

NEW OPEN EDIT SAVE ACTIONS

Title	Description	Modified
Review T6 February 2020	Regular Review 5-years	23/9/2019
Review R4 December 2019	Regular Review 5-years	23/9/2019
Review F7 January 2020	Regular Review 10-years	23/9/2019
Review M8 November 2019	Regular Review 3-years	23/9/2019
Review H5 October 2019	Regular Review 5-years	23/9/2019
Review G-3 March 2019	10-years Regular review G3	23/9/2019
Review K12 April 2019	3-years Regular Review	23/9/2019
Review A8 June 2019	10-years Regular Review with ...	23/9/2019

Review T6 February 2020

DETAILS SECURITY

Title: Review T6 February 2020

Created: Administrator 23. Sep 2019, 13:30

Modified: Administrator 23. Sep 2019, 15:35

Description: Regular Review 5-years

Status: Opened

Owner: Alex Nelson

Keywords: regular 5years

State: InReview

Message: Review prepared

Identifier: DnKxx_MUQLgICcczDj3HH-2-DyfTrzF

Complete

Transfer

Confirm Transfer

Discard

Image 304: 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.

 TransferConfirmation 23. 09. 2019 15:06 Microsoft Excelova ... 1 KB

Image 305: 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.

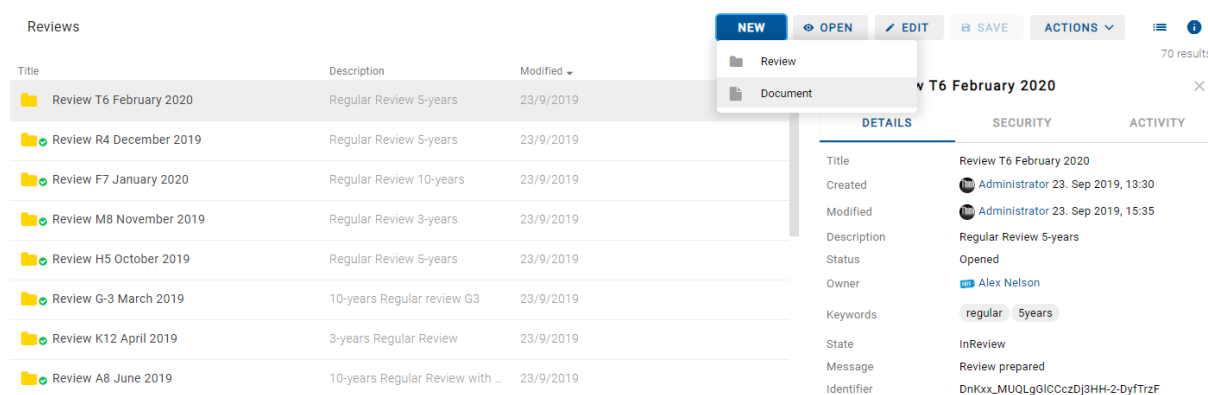
After confirmation the changes are transferred to the relevant review. After refreshing the view of IMiS/wClient the changes are visible to the team members.

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«.



The screenshot shows the 'Reviews' section of the IMiS/wClient interface. A table lists several reviews with columns for Title, Description, and Modified. A 'NEW' button is visible in the top right corner. A popup menu is open, showing options for 'Review' and 'Document'. The 'Document' option is selected. The details of the selected review, 'Review T6 February 2020', are displayed on the right side of the interface.

Title	Description	Modified
Review T6 February 2020	Regular Review 5-years	23/9/2019
Review R4 December 2019	Regular Review 5-years	23/9/2019
Review F7 January 2020	Regular Review 10-years	23/9/2019
Review M8 November 2019	Regular Review 3-years	23/9/2019
Review H5 October 2019	Regular Review 5-years	23/9/2019
Review G-3 March 2019	10-years Regular review G3	23/9/2019
Review K12 April 2019	3-years Regular Review	23/9/2019
Review A8 June 2019	10-years Regular Review with ...	23/9/2019

NEW **OPEN** **EDIT** **SAVE** **ACTIONS** 70 results

Review
Document

Review T6 February 2020

DETAILS **SECURITY** **ACTIVITY**

Title: Review T6 February 2020
Created: Administrator 23. Sep 2019, 13:30
Modified: Administrator 23. Sep 2019, 15:35
Description: Regular Review 5-years
Status: Opened
Owner: Alex Nelson
Keywords: regular 5years
State: InReview
Message: Review prepared
Identifier: DnKxx_MUQLgGICcczDJ3HH-2-DyfTrzF

Image 306: 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 screenshot shows the 'Create Document' dialog box with the 'DETAILS' tab selected. The dialog has three tabs: 'DETAILS', 'PHYSICAL PROPERTIES', and 'SECURITY'. The 'DETAILS' tab contains the following fields and options:

- Parent:** Review T6 February 2020
- Title*:** Review T6 Document (Mandatory value for naming entity)
- Description:** Document related to the T6 review
- Security class:** INHERITED
- Significance:** None
- Owner:** Alex Nelson
- Keywords:** regular, document (Important words used in entity)
- Categories:** review
- Content:** A dashed box with a cloud icon and the text 'Drag and drop files or click'. Below it, a file named 'Document_1.docx' (13.3 kB) is shown with a Word icon and a menu icon.
- External Identifiers:** Custom external entity identifiers
- Reason:**

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

Image 307: Adding document metadata

The screenshot shows the 'Create Document' dialog box with a progress bar indicating the upload status. The progress bar is at 100% and is labeled 'Uploading Document_1.docx (100%)'. A circular arrow icon is positioned above the progress bar.

Image 308: Adding a document to the review

Review T6 February 2020

DETAILS

SECURITY

ACTIVITY

Title

Review T6 February 2020

Created

Administrator

 23. Sep 2019, 13:30

Modified

Administrator

 23. Sep 2019, 16:00

Description

Regular Review 5-years

Status

Opened

Owner

Alex Nelson

Keywords

regular

5years

State

InReview

Message

Review prepared

Members

Jerry

Roger

Albert

Identifier

DnKxx_MUQLgGICczDj3HH-2-DyfTrzF

> Retention

Review T6 Document

Entity created

Image 309: 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.

The screenshot displays the 'Reviews > Review T6 February 2020' section. At the top, there are buttons for 'NEW', 'OPEN', 'EDIT', 'SAVE', and 'ACTIONS'. Below this is a table with columns 'Title', 'Description', and 'Modified'. The table lists several documents, including '2019-09-23T15:03:36.388+02:00', 'Review T6 Document', 'Review T6 Document #2', 'Review T6 Document #3', and 'Decisions - Page 1'. To the right, a detailed view for 'Review T6 February 2020' is shown, including tabs for 'DETAILS', 'SECURITY', and 'ACTIVITY'. The 'DETAILS' tab is active, showing fields like Title, Created, Modified, Description, Status, Owner, Keywords, State, Message, Members, and Identifier.

Image 310: 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.

This screenshot shows the same interface as Image 310, but with a popup menu open for 'Review T6 Document #3'. The menu includes options like 'Open', 'Edit', 'Actions', 'Status', 'Security class', 'Share', and 'Delete'. The 'Actions' option is highlighted, and a sub-menu is visible with options like 'New reference', 'New version', 'Move', and 'Export'. The detailed view on the right shows fields for Title, Description, Created, and others.

Image 311: 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 ≥ 66.0.3359
 - Firefox ≥ 60.0.1
 - Edge ≥ 42.17134
 - Safari ≥ 11.1
 - Internet Explorer 11 ≥ 11.0.10240.16384.
- 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

- Brskalniki:
 - Chrome ≥ 77.0.3865.90
 - Firefox ≥ 69.0.1
 - Edge ≥ 44.18362.1.0
 - Safari ≥ 12.1.2
 - Internet Explorer 11 ≥ 11.0.10240.16384.
- 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 9.4.1910.104.
- 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 9.5.1910.105.
- Disk capacity for installing the IMiS®/wClient is ≥ 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 (optional).
search.hideFields	String []	Collection of fields which are hidden in the search dialog by default.
search.focusField	String	The field which is marked first when displaying the search dialog.
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.
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.

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.

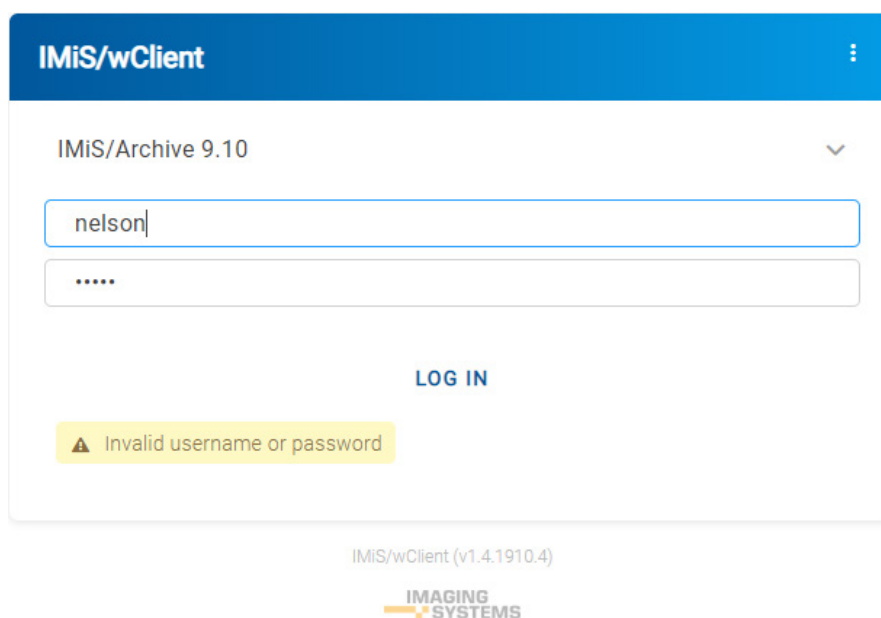


Image 312: An example of the error: Invalid or incorrect password

»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.

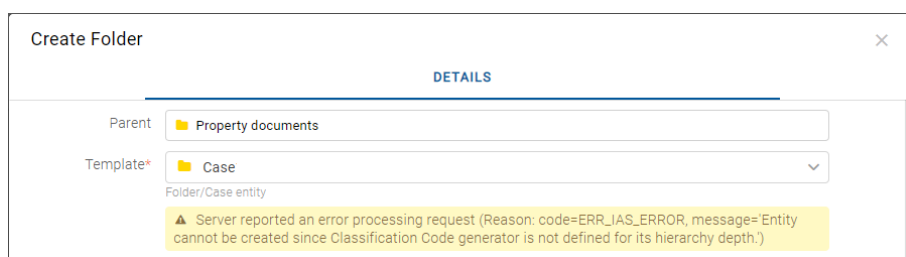


Image 313: An example of an error when saving a new folder

»[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.

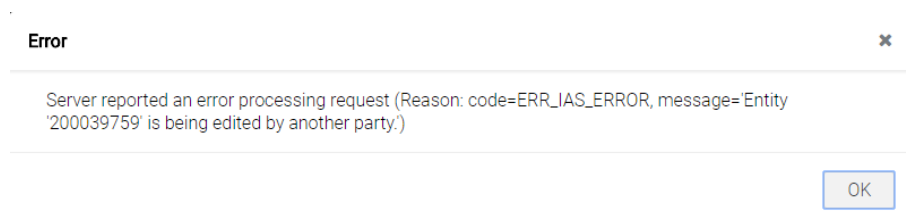


Image 314: An example of an error when opening an entity in editing mode