IMiS®/wClient Manual

Version 1.7.2110

IMAGING SYSTEMS

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1 PREFACE

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

1.1 About the manual

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

1.2 Target audience

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

1.3 Conventions

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

Font type	**Used to denote**
Regular	basic text, images, tables
regular bold	chapter titles (main chapters 1-6 and subchapters)
Italic	advice, examples, tips, instructions
"inside quotation marks"	titles of selectable functions, files or actions
underlined italic	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

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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)

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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)

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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)

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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

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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.

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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.1.7.2110.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.

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2.3 Functionalities

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

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

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2.4 New functionalities in this version

We have implemented the following new functionalities and improvements to the previous certified version 1.5.2010 of the IMiS®/wClient module:

New functionalities:

- Access to converted content in grid view.
- Reading collections with a handle.
- Displays attribute information in entity details.
- Option of selecting the attribute column to be displayed.
- Setting the theme and icon in the header of the user interface.
- Option of hiding and specifying the order of attributes in the search.
- Verifying the validity of wScan settings.
- Printing entity content.
- Export and import of decisions.
- Moving the position of dialogs and notifications.

Improvements:

- Transferring multiple email messages to the classification scheme simultaneously.
- Displays a notification after adding/modifying/deleting a reference.
- Searching for an archive on the login page.
- Dropping email messages to the archive.
- Keyboard use supported in edit mode.
- Removing all tagged attributes in the search settings.
- Displays review entities when editing.
- Refreshing the view in the "Preparing" state.

Small improvements:

- Default display of the "State" column in reviews.
- Physical properties tab disabled for email documents.
- Localization of the date field.
- Empty status value in the document contained in the folder.
- Framework upgraded to Angular 12 and PrimeNG 12.

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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.

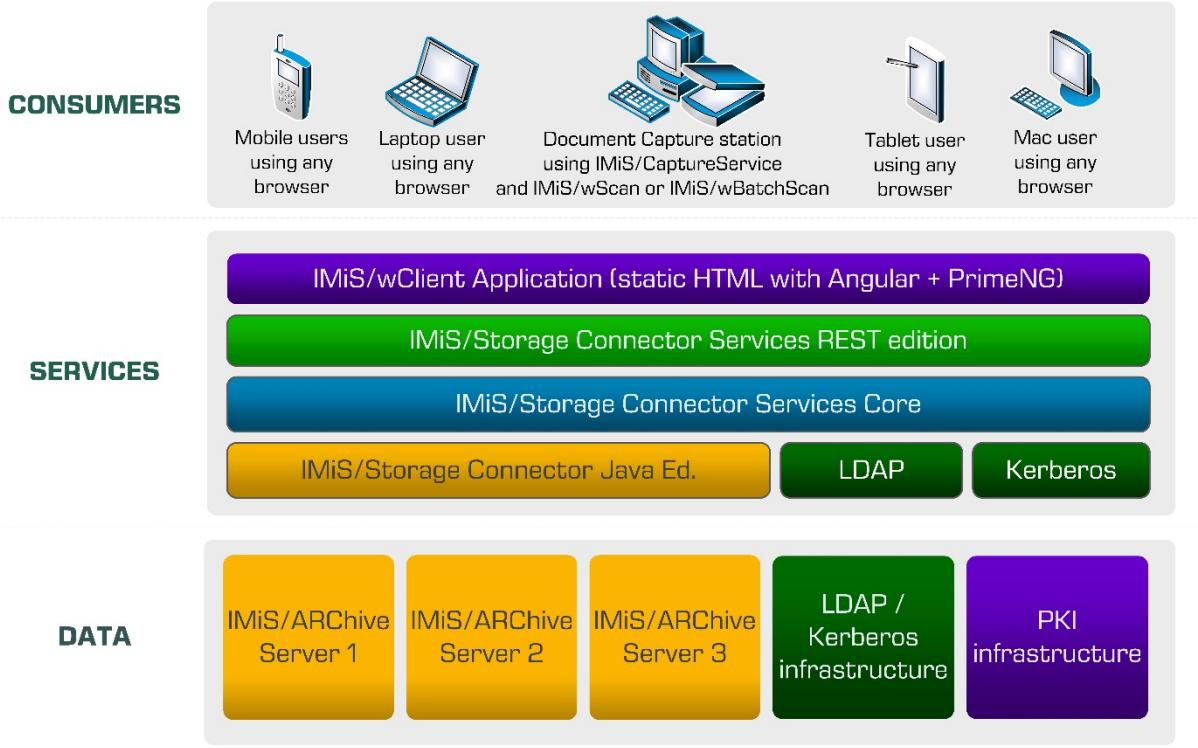

Image 1: Client architecture

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.

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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.

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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		

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/<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	

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/<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:CurrentLocation	**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

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/<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	

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/<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

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/<entity_type>/Event_history/date/opened

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

/<entity_type>/Event_plan/date/return

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

/<entity_type>/Event_plan/status/permanent

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

/<entity_type>/Identity/system_identifier

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

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/<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

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/<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		

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/<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

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Commentary:	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: • 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). 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: • 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. Description of enumerator values for the type of access right: • EXPLICIT_ALLOW: explicit permission. • EXPLICIT_DENY: explicit denial. • INHERITED_ALLOW: inherited permission. • INHERITED_DENY: inherited denial.				
XMLScheme type:	none	**Reference:**	ACL	**MOREQ2 code:**	/

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/<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:**	/

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/<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:	The »part« label contains the name of a separate file, which contains exactly one exported document content, and the following XML attributes: • 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 hash: hash value of the content that is used for verifying the authenticity of a separate file.				
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:**	/

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/<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:**	/

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/<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:	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. Two XML attributes are contained: • Hash_algorithm: »string« type containing the name of the hash algorithm. • Hash: hash value of file with the authenticity evidence. The value of the XML tag contains the name of the authenticity evidence file.				
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:**	/

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/<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:	The "property" label represents the entity attribute together with values. Every »property« label can have the following XML attributes: • "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:	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. 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. For BINARY attributes the »value« label also contains the XML »mime« attribute, which contains data on the content type.					
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:	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.					
XMLSchema type:	complexType	**Reference:**	ACL	**MOREQ2 code:**	/	

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/<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

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/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: • 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

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/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 arhcived 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.

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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

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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.

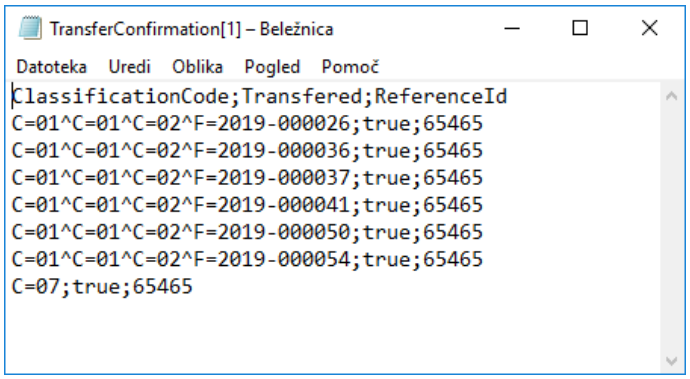

Image 5: Example of a confirmation file after transfer

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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.

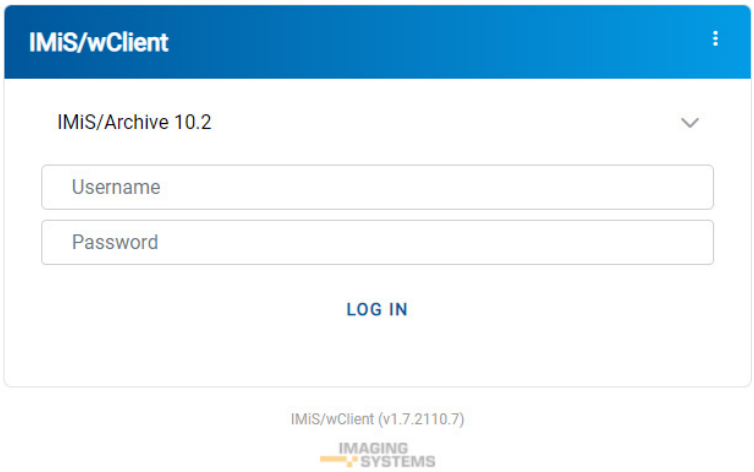

Image 6: Login on archive

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

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- Description visibility
- Sort field
- Sort field descending.

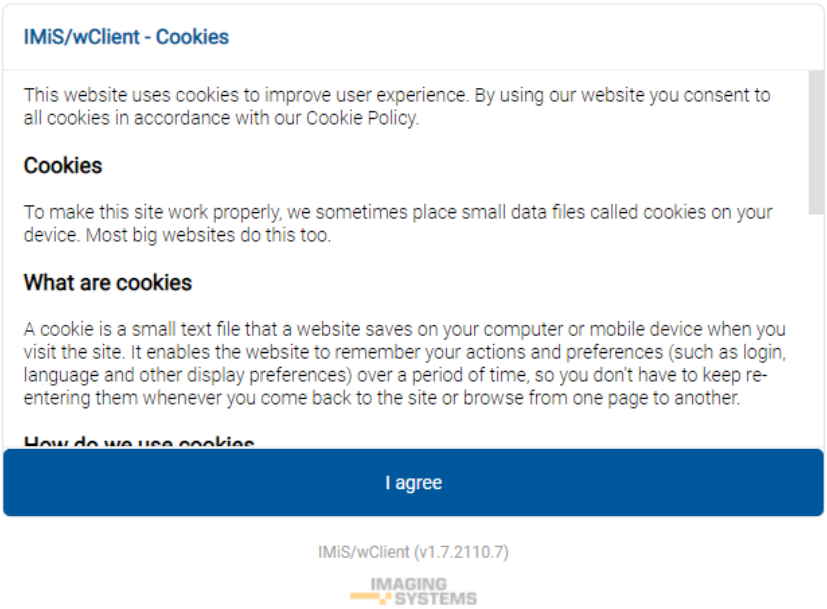

Image 7: Cookie Policy

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.

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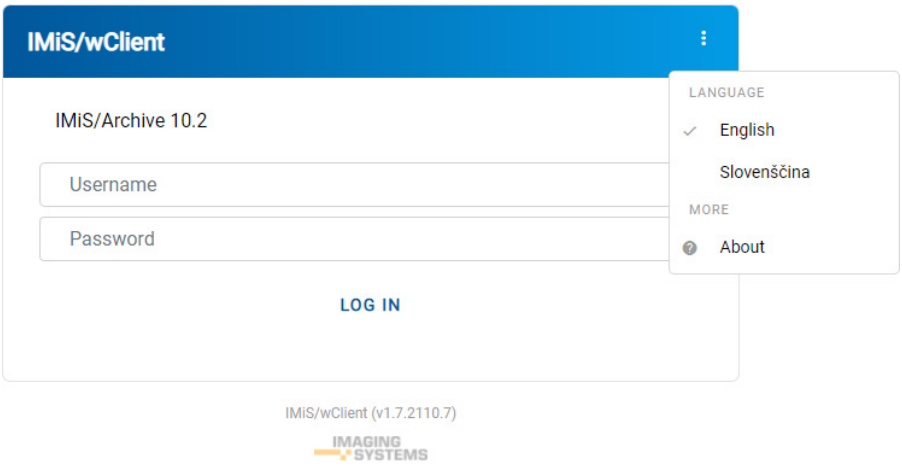

Image 8: Language selection

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.

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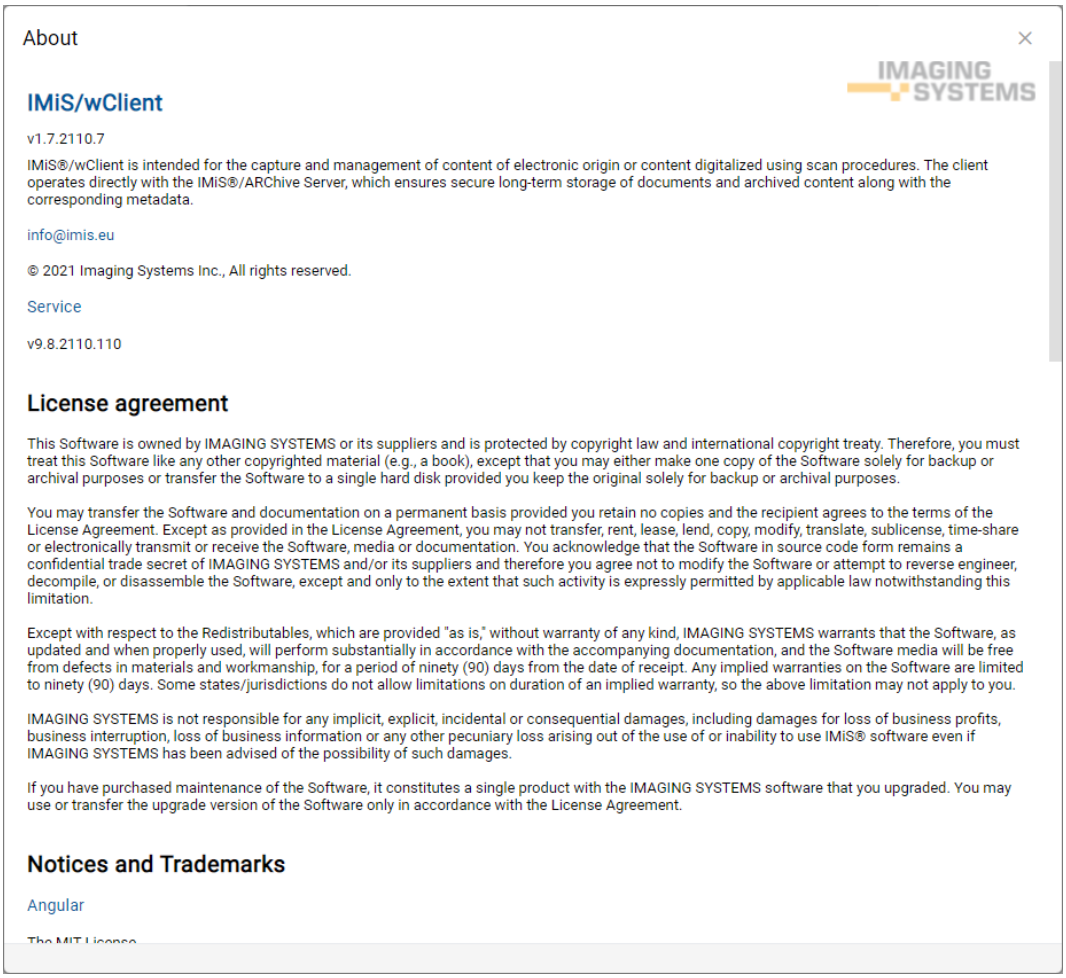

Image 9: About dialog box

4.1.4 Login

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

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

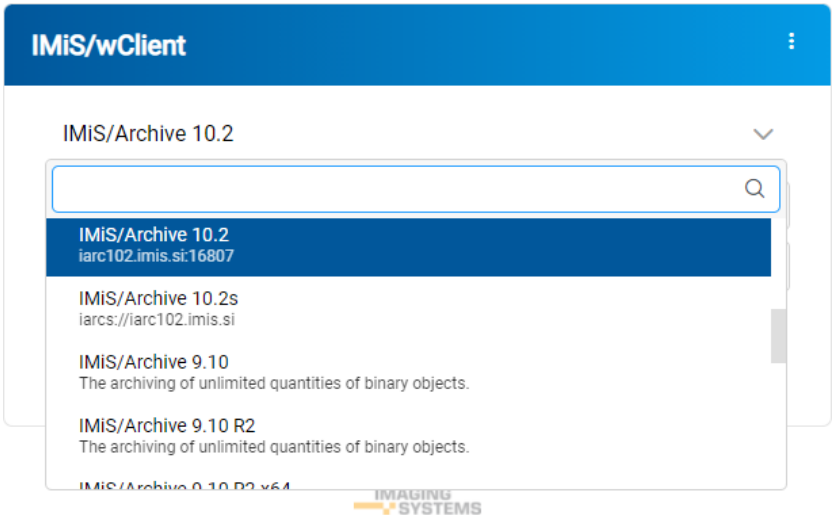

Image 10: A list of available archives

Note:

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

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

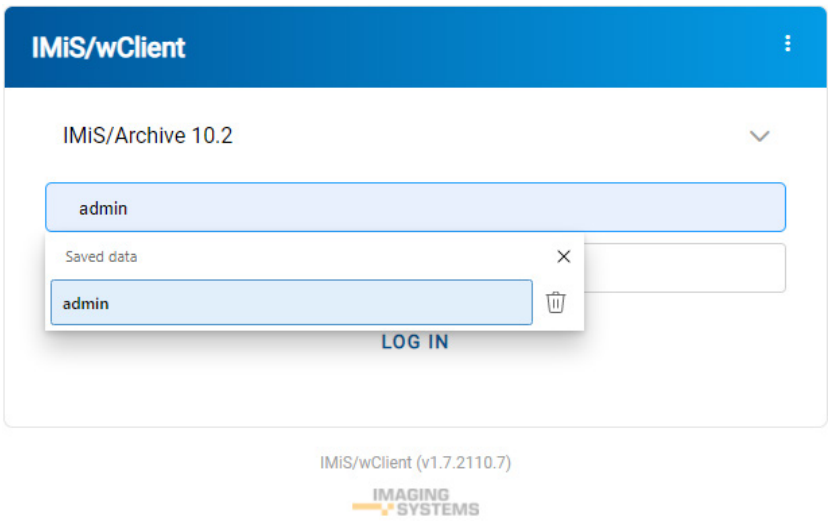

Image 11: Logging into the archive

After entering at least one character of the password, the logged-on user is shown the icon . By selecting the icon, the user is shown the password characters.
The icon next to the input field for entering the password enables displaying the password only when the display button is active (Mousedown). The password that the user enters in the "Password" field is case-sensitive.
The user confirms login with the »Log in« button.

The user can log into multiple archive servers in multiple browser tabs.
When displaying the login page after the user has logged out, the user session remains open.
If the browser is refreshed, the user stays logged into the last archive server.
If the archive identifier does not match the URL after the browser has been refreshed, the login page is shown.

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

4.1.5 Logout

The user logs out of the archive using the »Log out« command in the popup menu.
Access to the popup menu is enabled by clicking the arrow next to the user's name in the top right corner of the user interface.

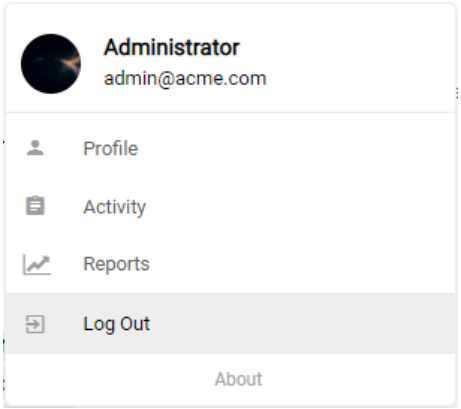

Image 12: Log out of the archive

4.2 Interface description

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

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

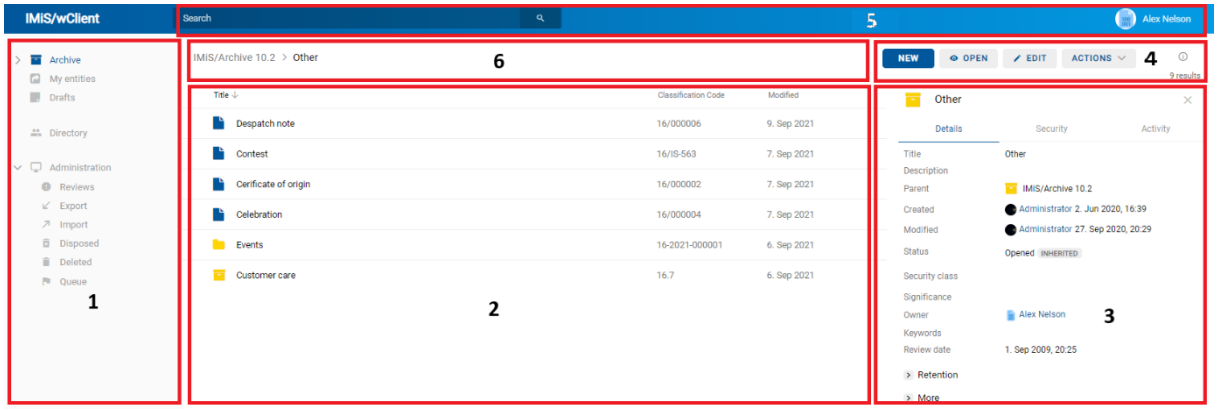

Image 13: User interface of the IMiS®/wClient

Folders

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

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

For more information see chapter Classification scheme.

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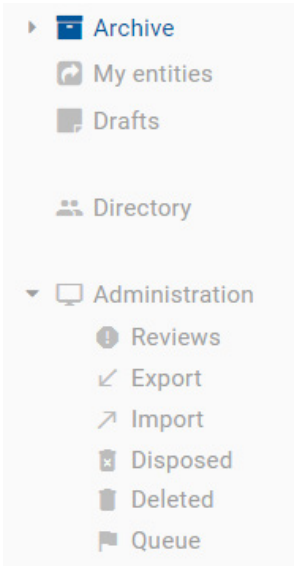

Image 14: Categories in the left view

The central view

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

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

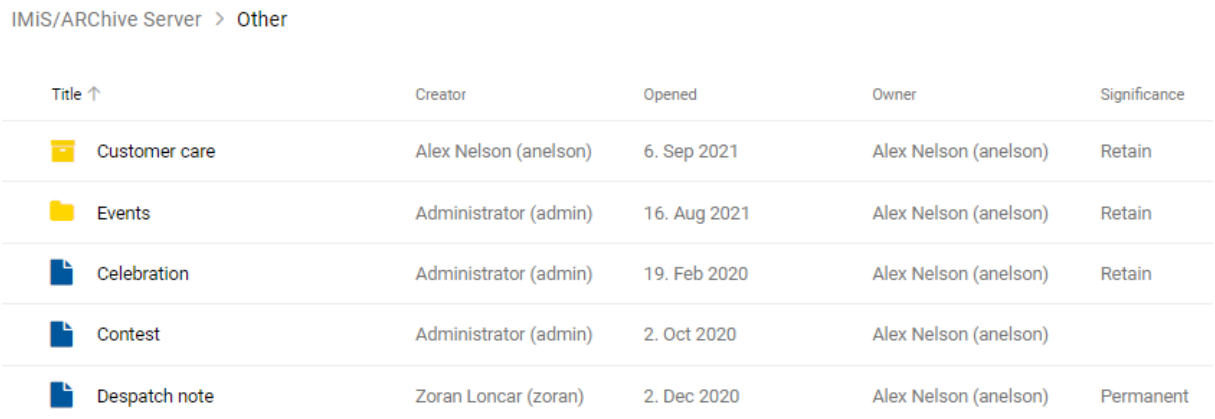

Image 15: A list of mixed entity types

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The contained entities are shown below the bar with the titles of the common attributes. The »Title« is shown by default. More on the central view in the chapter List of entities.

Note: When displaying a greater number of entities, loading all the entities simultaneously would greatly slow down the web client. That is why the user can load (directory) entities by pages.
After showing the first 50 entities, the slider stops halfway; by moving the slider all the way down, 50 new (directory) entities are added.

The user can set the spacing between the left and central view by moving the dividing line. This setting applies while the user is logged into the archive.

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

The right view

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

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

For more information see the chapter Entity information and Entity access.

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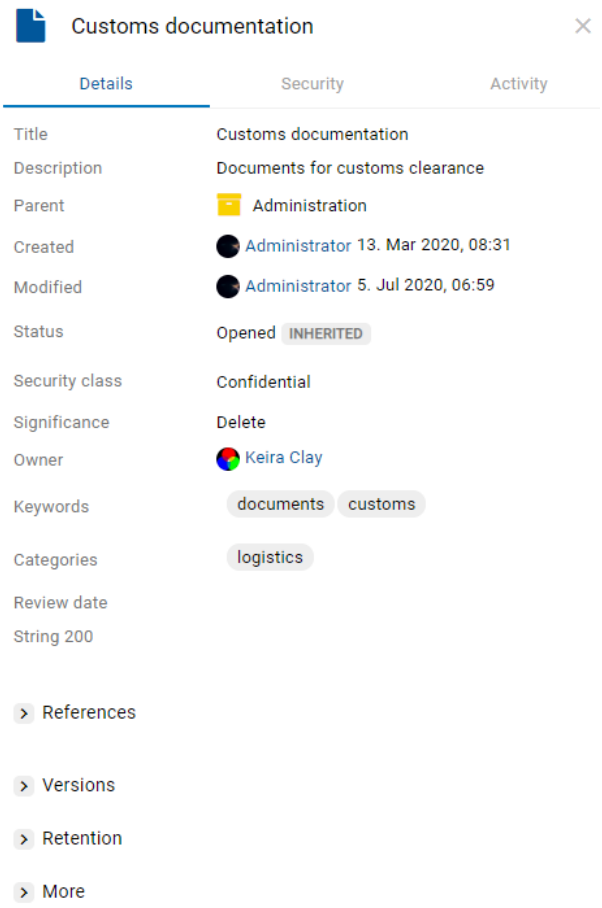

Image 17: Entity information

Note:

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

The command bar

The command bar (number 4 in the image above) contains commands and actions.

They depend on the type and status of the element selected in the classification scheme or of the entity selected from the list of entities, and on the user's rights and role.

For more information see the chapter Command bar.

Image 18: Display of the command bar

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Note:

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

The header of the user interface

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

- Information on the title of the application (IMiS®/wClient).
- A field for entering the search string with the option of selecting the search scope.
  For more information see chapter Search.
- Information on the user's profile and the program module.
  For more information see chapter Menu functions.

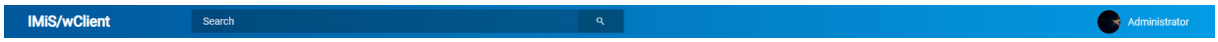

Image 19: Header of the user interface

The user interface can be customized with additional settings for each archive.
The default name "IMiS®/wClient" and theme color can be replaced e.g., with the company's logotype and color.
Below is a list of theme parameters which the user can set in the file settings.json.

themes[]	**Description**
logo	The logotype shown in the top bar.
primary_color	The primary theme color.
primary_color_gradient	The primary gradient color which is used in the top bar as the background color.
primary_color_variant	The primary dark color.
primary_color_text	The primary text color.
focus_color	The focus color which appears as a border around the buttons when clicked and as a border around the text entry box.
archives	The collection of archives in which the theme is used. If this element does not exist or is empty, the theme is global.
class_icon_color	The color of the icon of class-type entities.

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folder_icon_color	The color of the icon of folder-type entities.
document_icon_color	The color of the icon of document-type entities.
directory_entity_icon_color	The color of the icon of directory entities.
secondary_color	The secondary theme color.
secondary _color_variant	The secondary dark color.
secondary _color_text	The secondary text color.
link_color	The color of link text. The default value is primary_color.

Table 6: Theme settings in the file settings.json

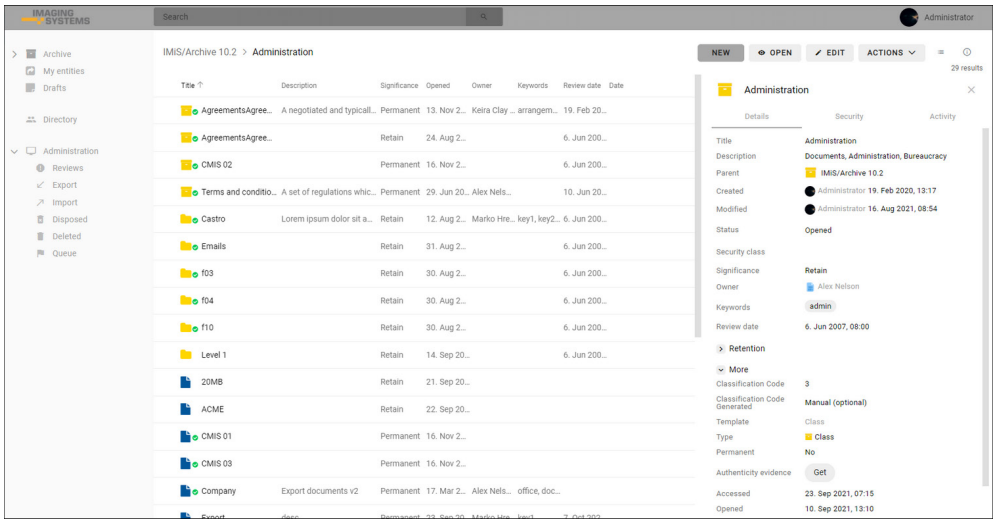

Image 20: Example of changing the theme settings in the file settings.json

The hierarchical view

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

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

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

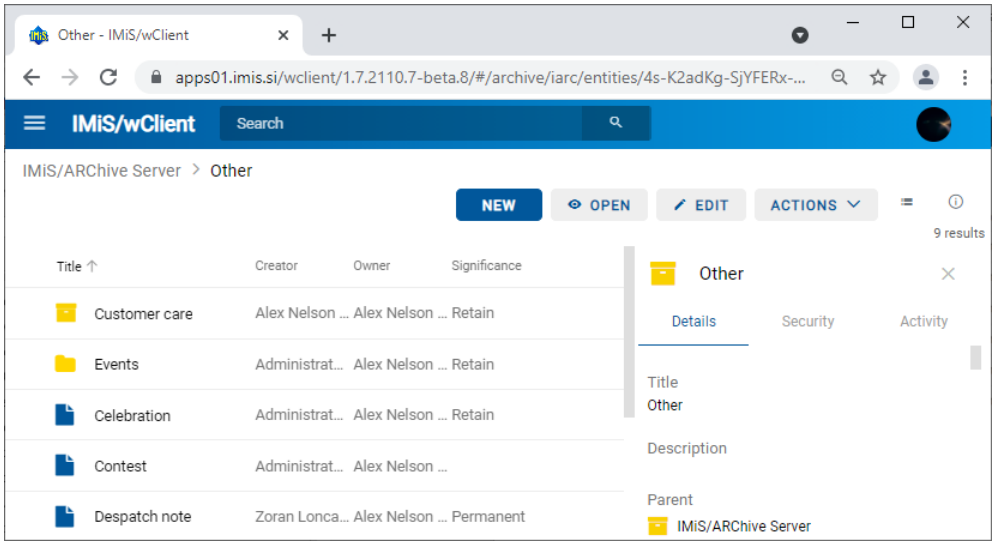

Image 22: Narrowing the user interface display

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

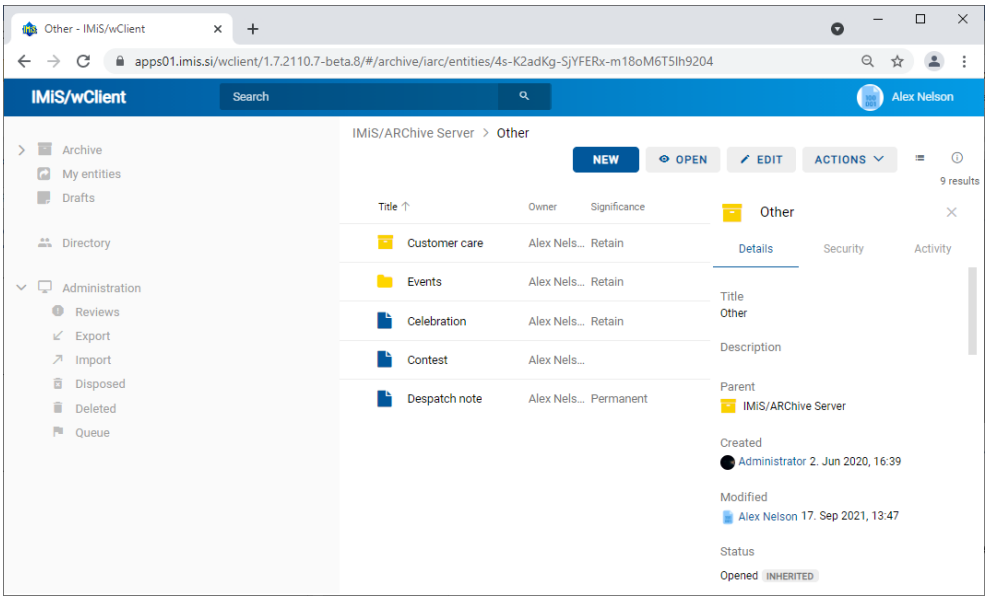

Image 23: Access to folders in the left view via the menu

4.2.1 Classification scheme

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

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

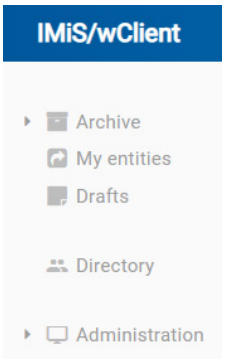

Image 24: Display of folders in the left view of the web client IMiS®/wClient

4.2.1.1 The Archive folder

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

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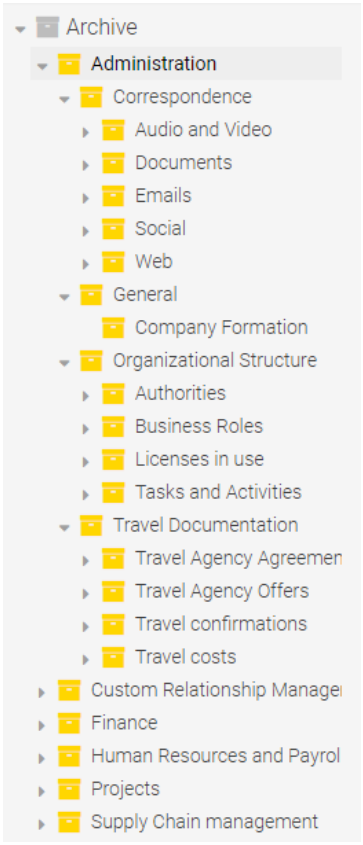

Image 25: The tree view of the classification scheme in the Archive folder

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

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

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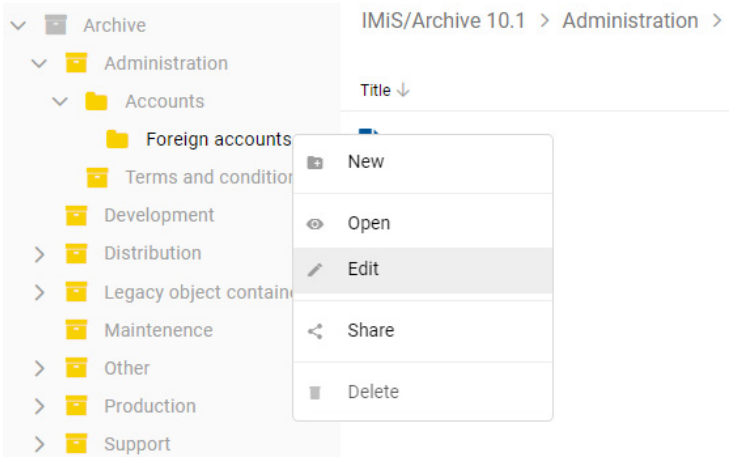

Image 26: Popup menu in the tree view

Note:

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

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

4.2.1.2 The My entities folder

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

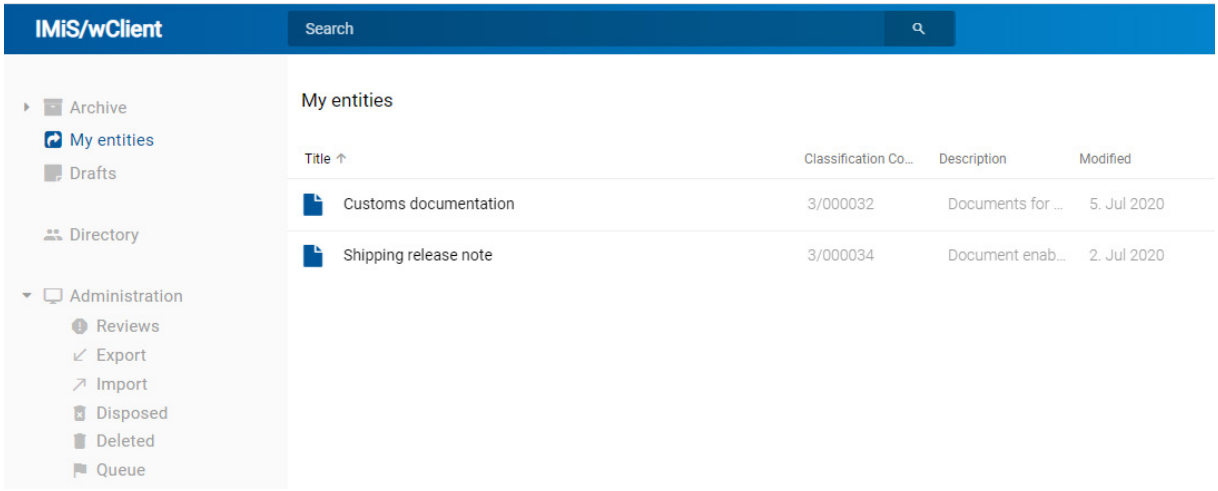

Image 27: Selecting the entity in the My entities folder in the central view

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4.2.1.3 The Drafts folder

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

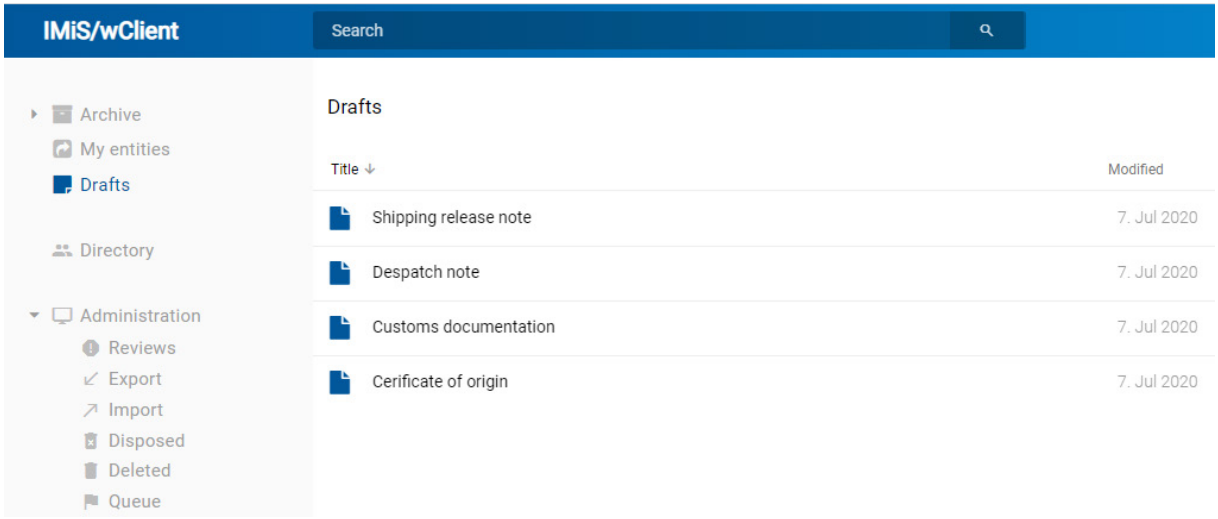

Image 28: Selecting the Drafts folder in the left view

4.2.1.4 The Directory folder

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

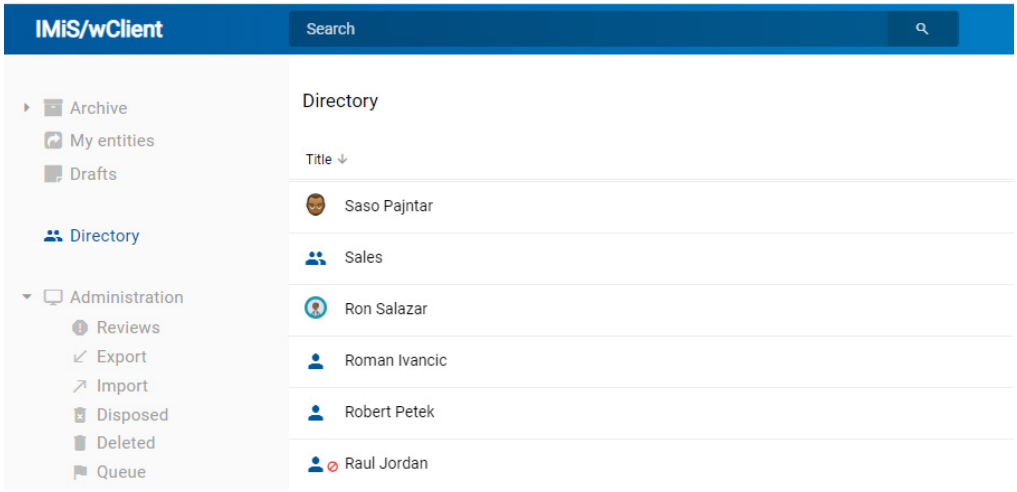

Image 29: The Directory folder in the left view

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.

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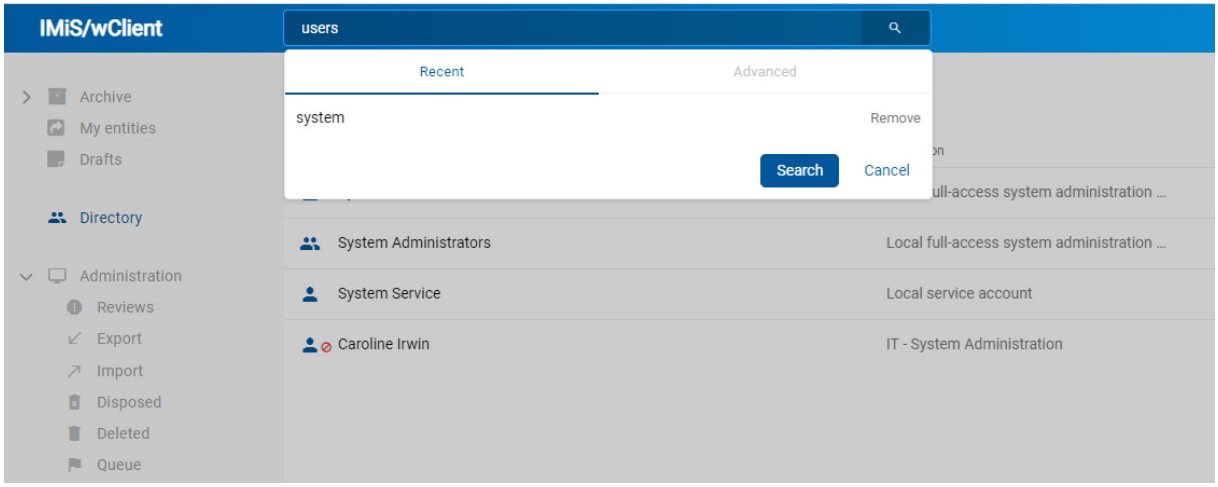

Image 30: Searching by directory entities

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

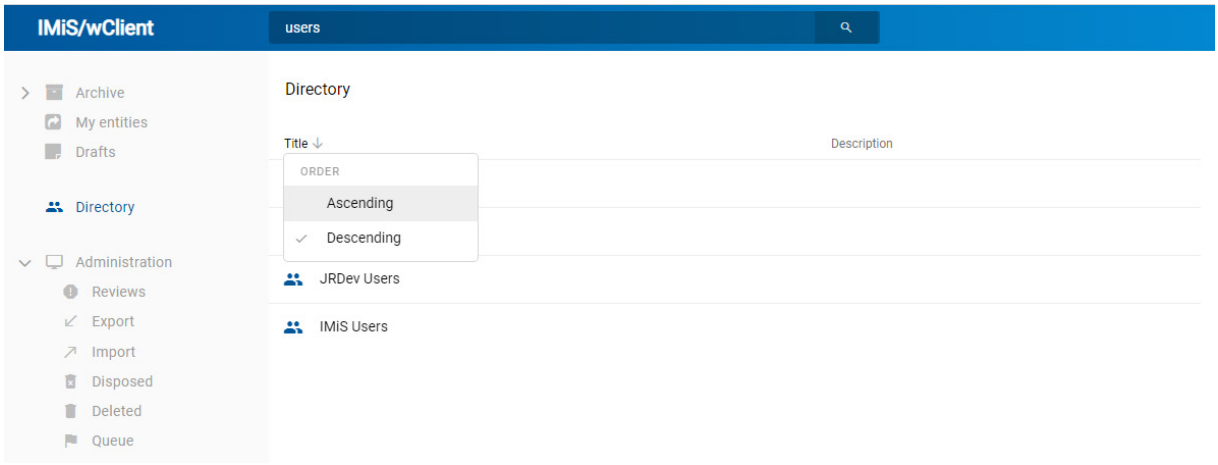

Image 31: Results of searching by directory entities

The right view provides the directory entity information.

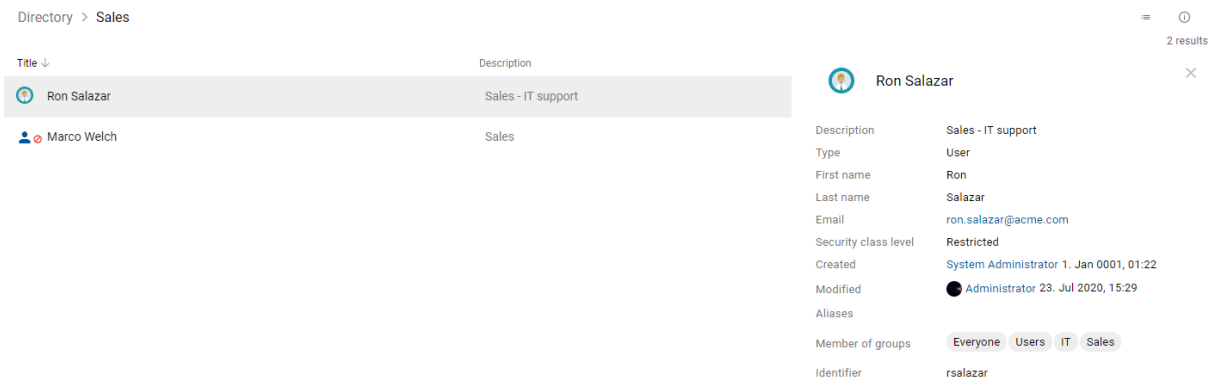

Image 32: User data

4.2.1.5 The Administration folder

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

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

4.2.2 List of entities

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

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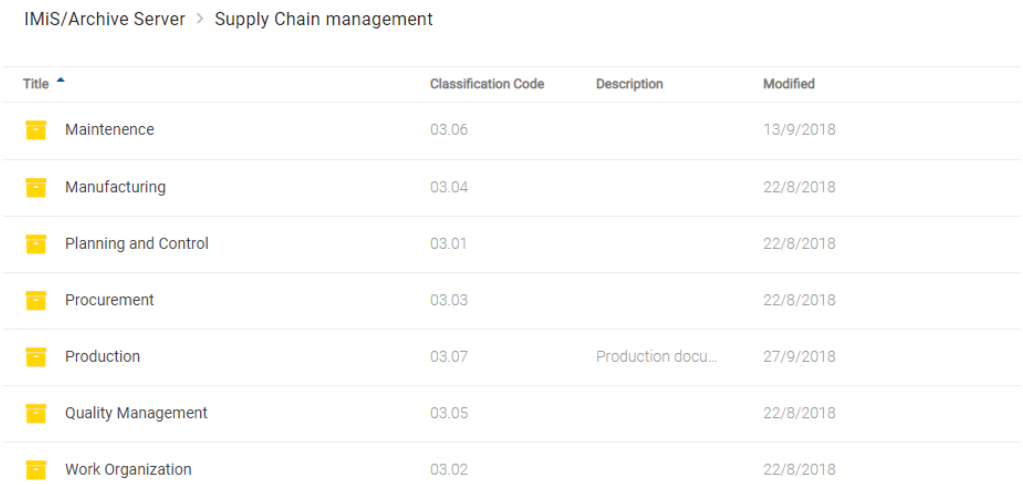

Image 33: A list of contained entities of the selected entity

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

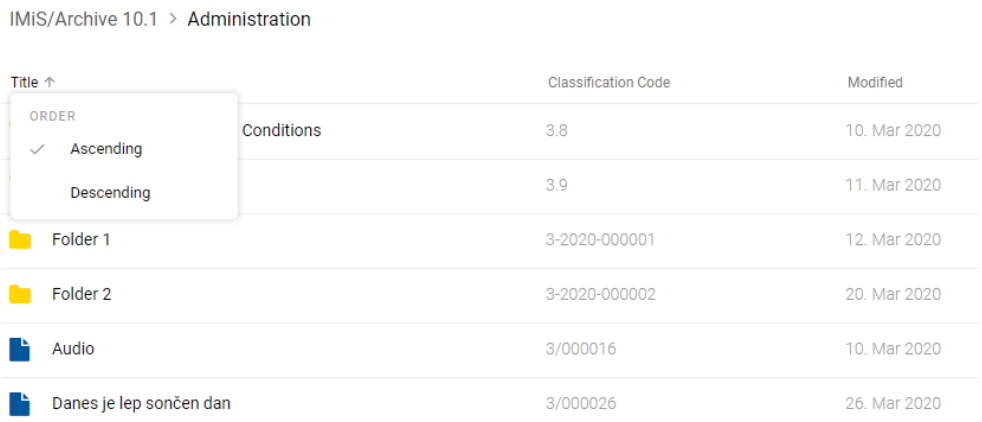

Image 34: Sorting by entity type

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

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

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

For more information on setting the number of entities shown on the list see chapter Installation settings.

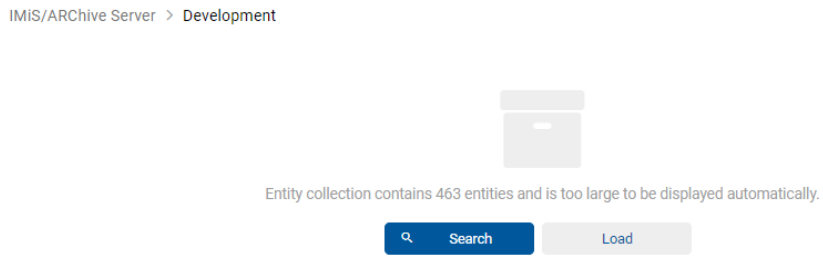

Image 35: Limiting the display of a greater number of entities on the list

The user has two options:

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

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

For more information on limiting the set of attributes for a search, see chapter Full text search.

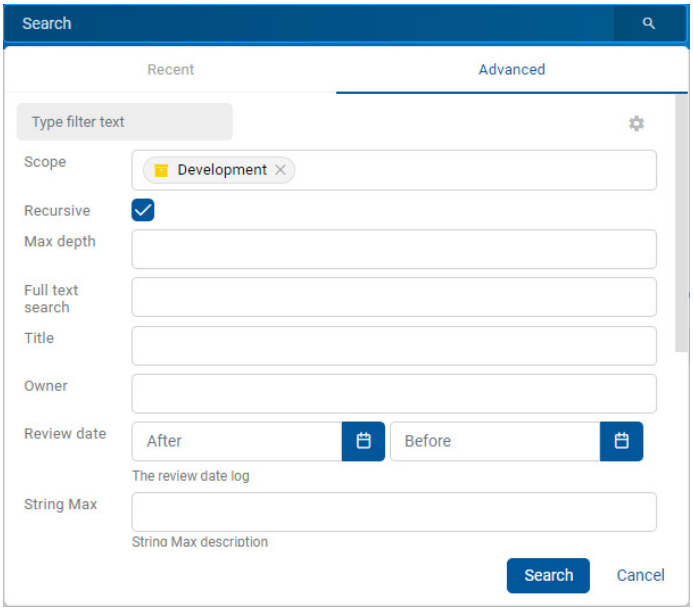

Image 36: Limiting the set of entities displayed on the list with a search

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

The user 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.

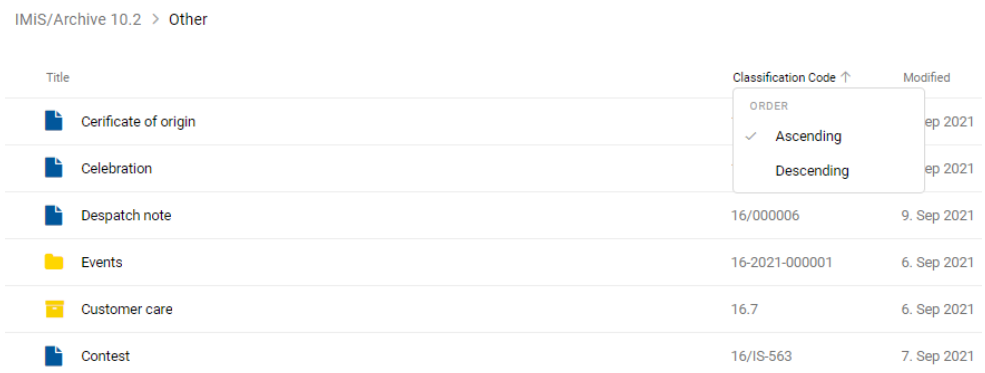

Image 37: Selecting the order of displaying the list of entities

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

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

4.2.3 Entity information

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

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

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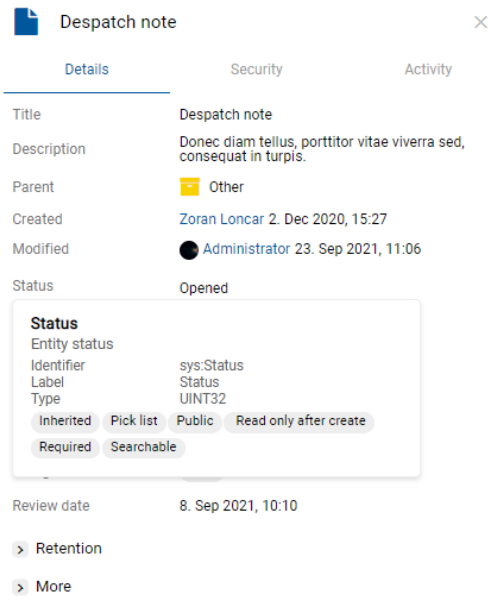

Image 38: Tabs containing entity information in the reading mode

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

4.2.3.1 The Details tab

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

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

4.2.3.1.1 General metadata

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

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

For more information on required and optional attributes see chapter General system attributes.

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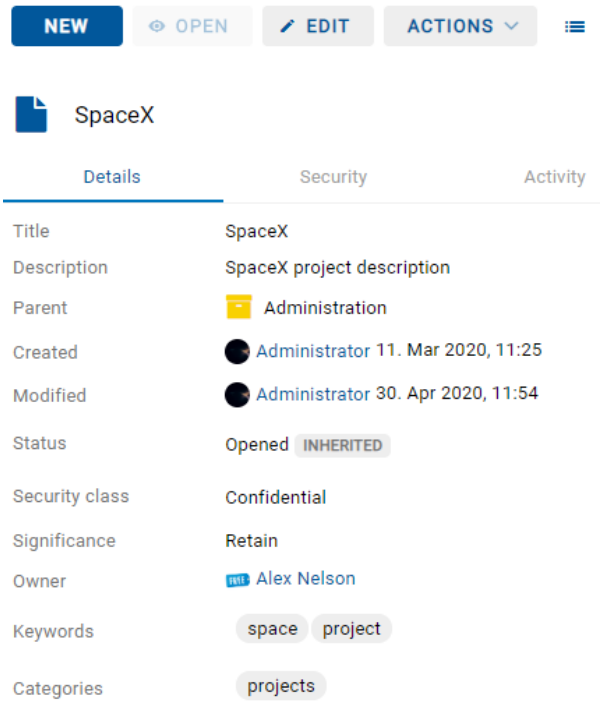

Image 39: The Details tab in the reading mode

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

4.2.3.1.2 Custom metadata

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

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

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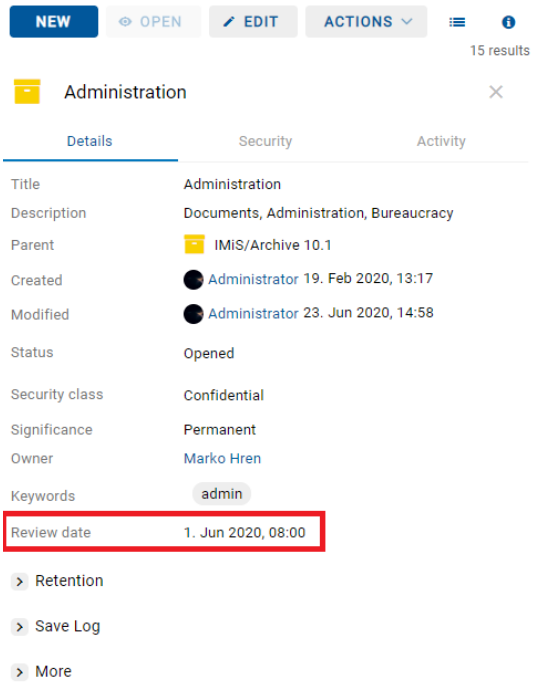

Image 40: Custom metadata in the reading mode

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

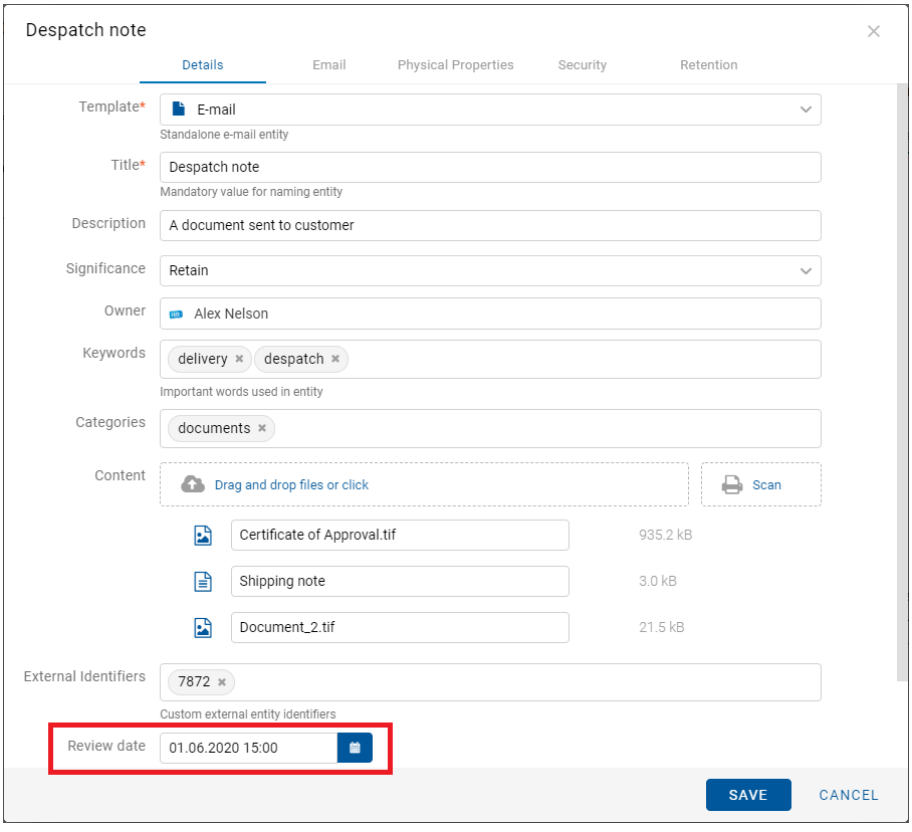

Image 41: Custom metadata in edit mode

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

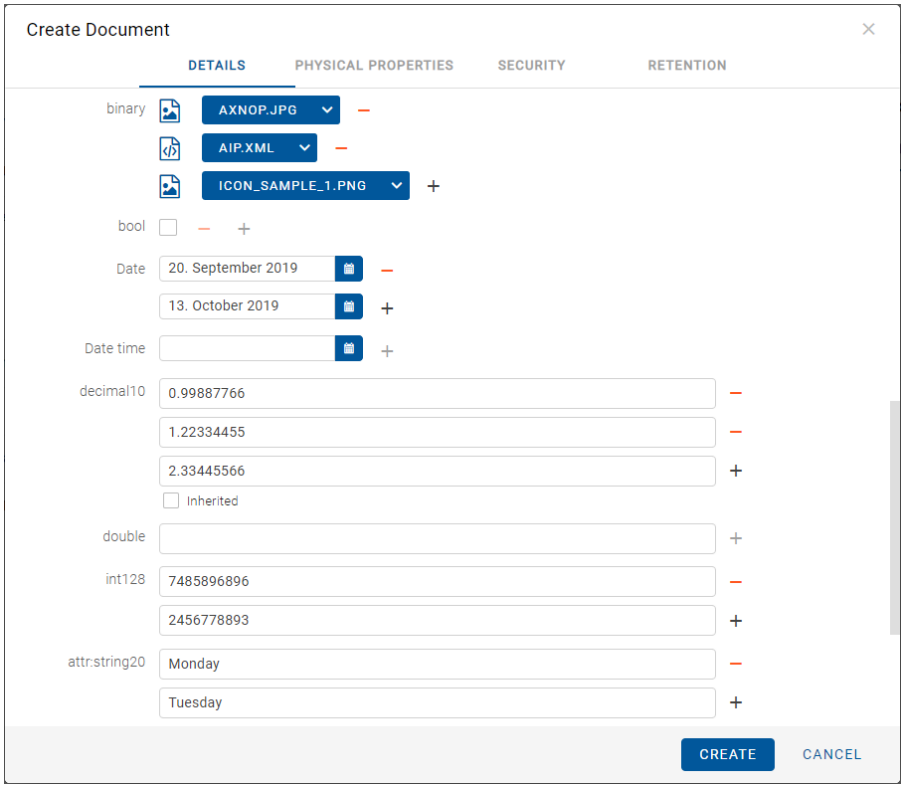

Image 42: Specifying multi-value attributes

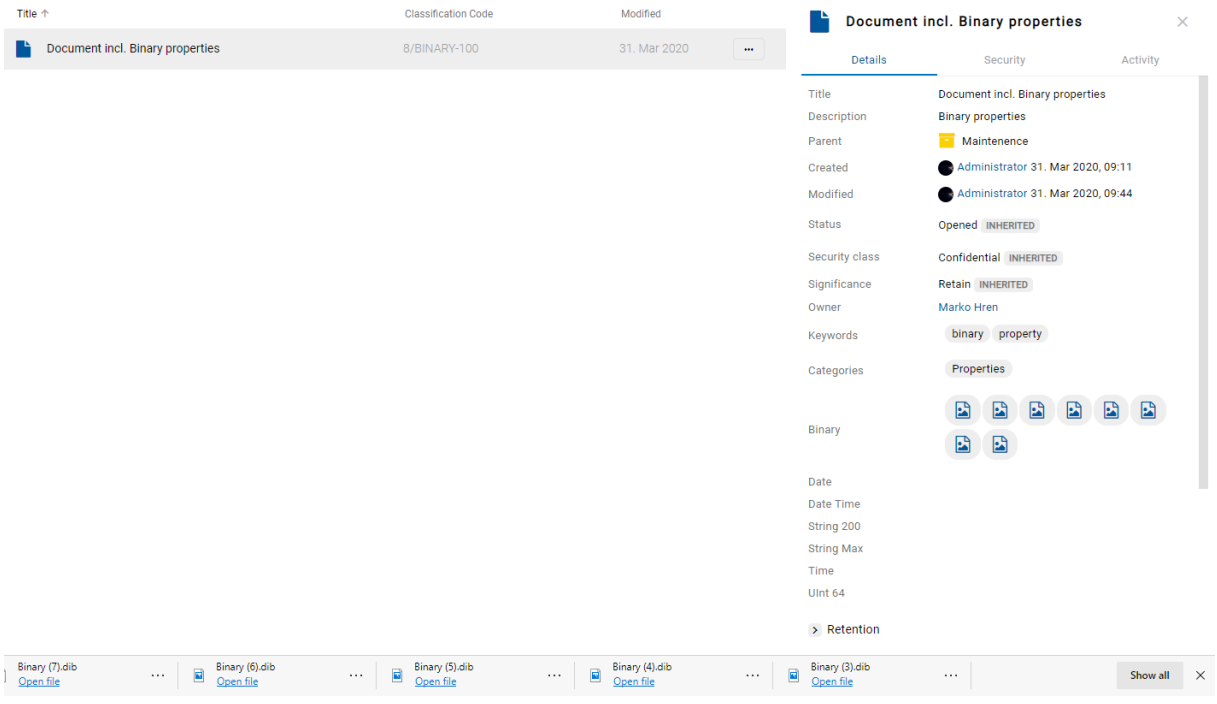

Image 43: Display and selection of binary values

4.2.3.1.3 System metadata

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

For more information see chapter General system attributes.

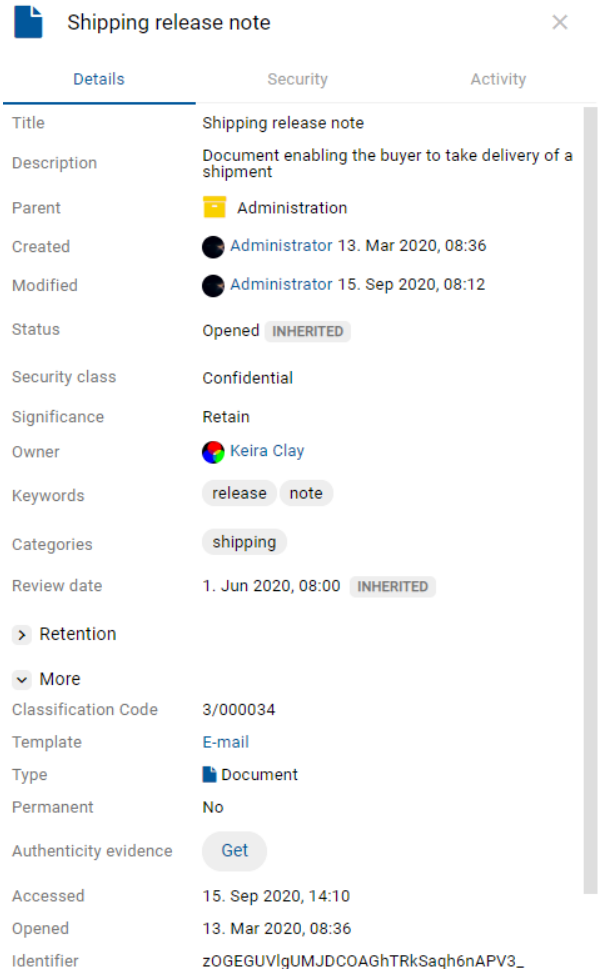

Image 44: The Details tab in reading mode

4.2.3.1.4 Changing the display of metadata

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

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Element "details.profiles.sections"

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

- More
- Retention
- Versions
- References.

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

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

Table 7: Setting the collection of displayed columns

Element "details.display.members"

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

- Members Id
- Alias
- Subject.

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

Element "details.display.archives"

In the element details.display.archives the user defines to which archives the settings apply. The user can define:

- Archive Id.

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

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

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

4.2.3.1.5 Reference

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

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

Image 46: References in the Details tab

For more information on editing a reference see chapter Adding and editing references.

4.2.3.1.6 Email

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

For more information see chapter Email attributes.

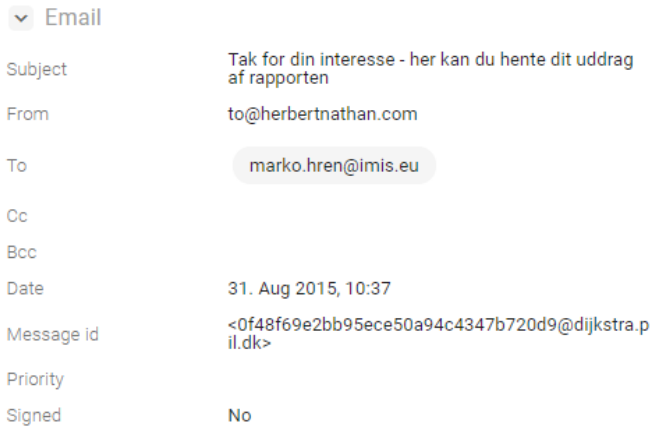

Image 47: Email data in the reading mode

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

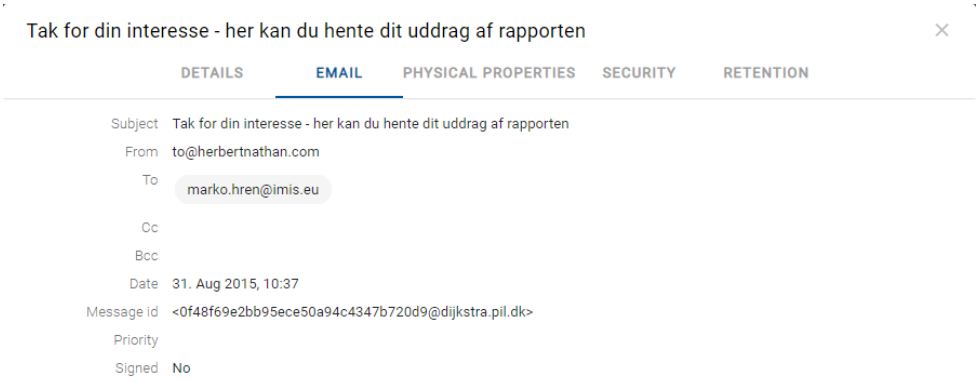

Image 48: Email data in the editing mode

4.2.3.1.7 Physical content

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

For more information see chapter Physical content attributes.

Image 49: Physical content data in the reading mode

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

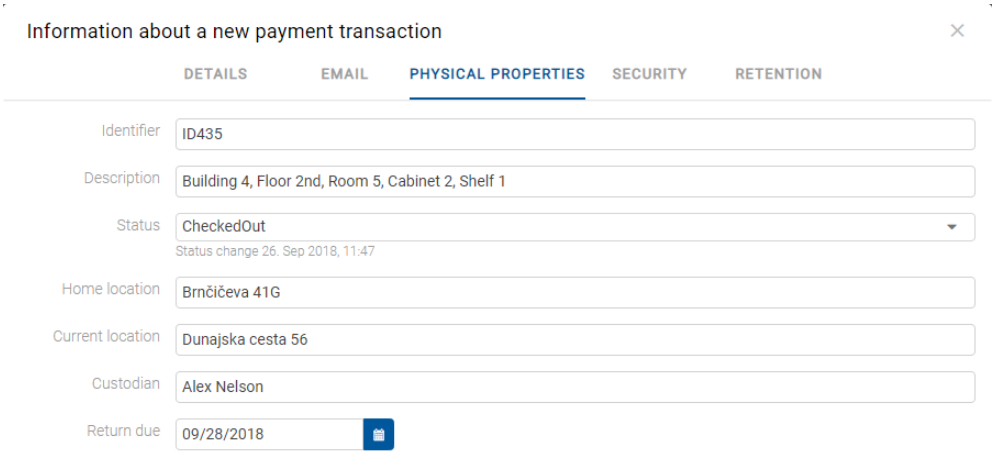

Image 50: Physical content data in the editing mode

4.2.3.1.8 Save log

After checking the validity of electronic signatures and digital certificates upon capture, a Save log is created. The user can review it in the open mode by selecting the Get icon in the More section.

For more information see chapter Checking the validity of the digital certificate.

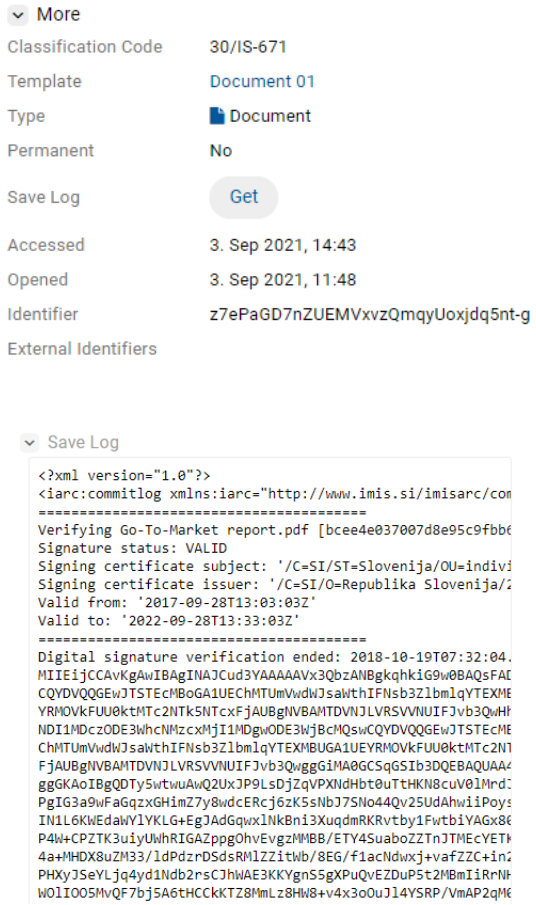

Image 51: A report on checking the validity of electronic signatures and digital certificates

4.2.3.1.9 Retention

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

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

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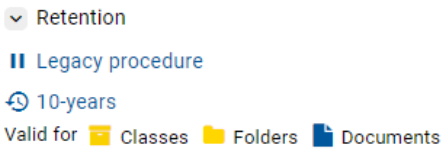

Image 52: Retention and disposition hold periods in the »Retention« tab

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

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

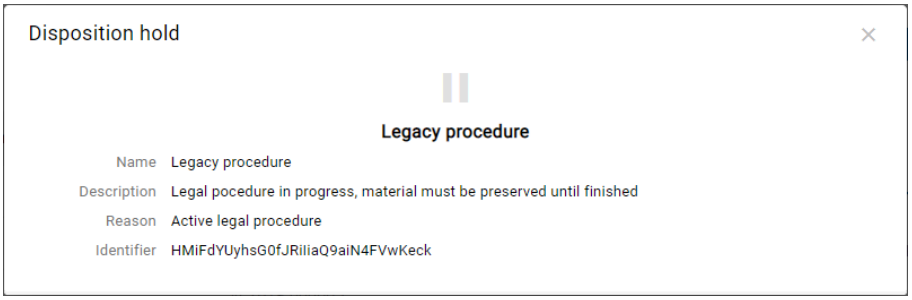

Image 53: Information on disposition hold

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

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

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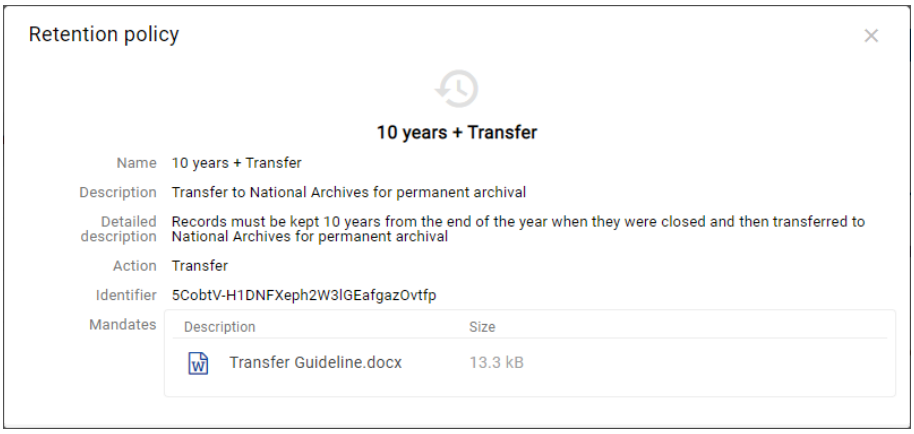

Image 54: Retention policy information

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

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

4.2.3.2 The Security tab

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

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

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

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

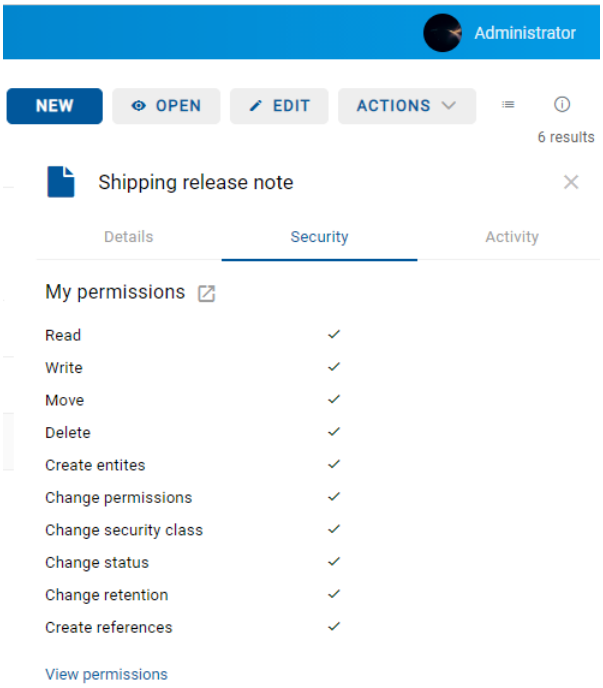

Image 55: The Security tab for a logged user in the preview mode

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

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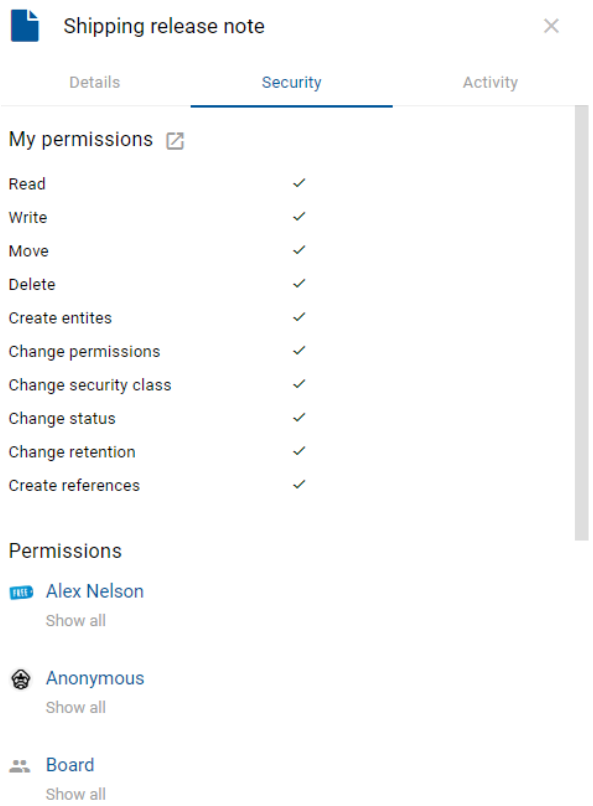

Image 56: A list of directory entities with access rights to the entity in the reading mode

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

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.

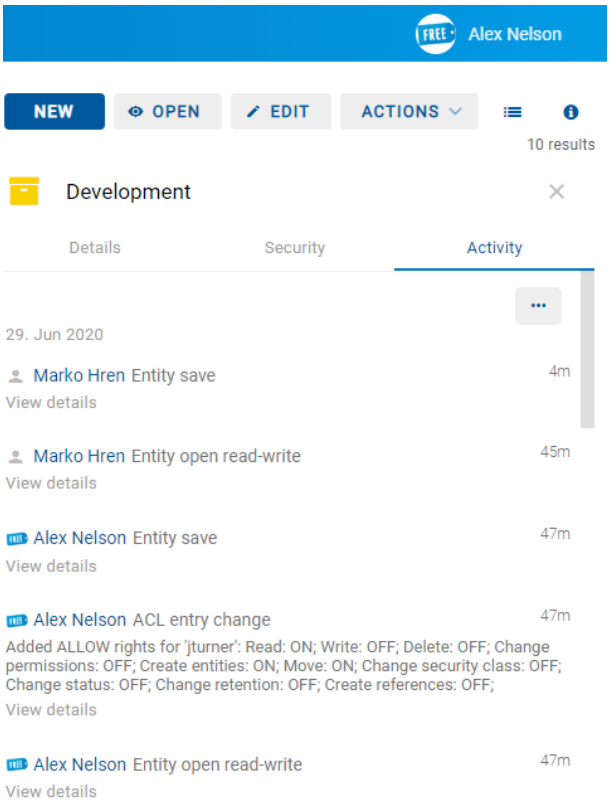

Image 57: The Activity tab in the preview and reading mode

The audit log records the following information:

- User: the name of the user who performed an action on the selected entity.

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

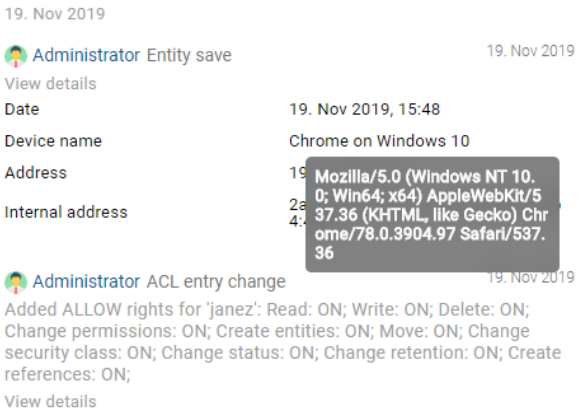

Image 58: Information about the user who performed an action on the entity

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

When choosing the »Export« command in the right upper button, a popup menu appears with the possible audit log export formats for the selected entity. The supported formats are CSV and XML.
After selecting the format, the user is shown a notification in the bottom left corner about the downloaded content.
In the popup menu the user has the option of selecting actions. By selecting the action “Open”, the user has the option of saving the audit log to the file system.

4.2.4 Command bar

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

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

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- 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.

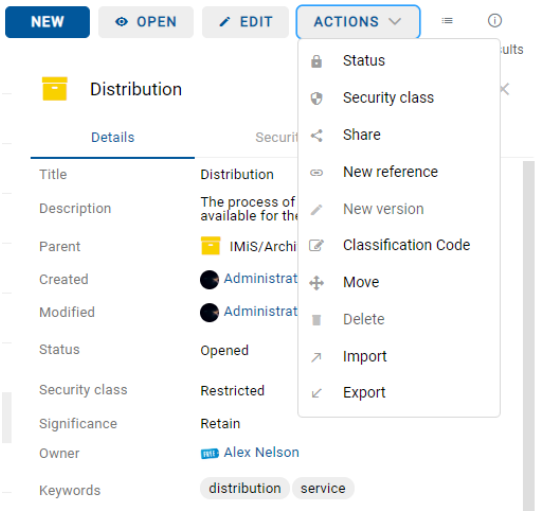

Image 59: Command bar above the information of the selected entity

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 .

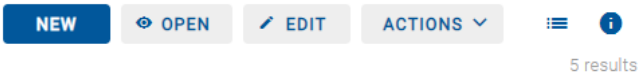

Image 60: Enabling/disabling the display of entity information

4.2.5 Menu functions

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

- Profile: information about the user.

  For more information see chapter User information.
- Activity: information about audit log events for the selected user and entity.

  For more information see chapter Searching audit log events.

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

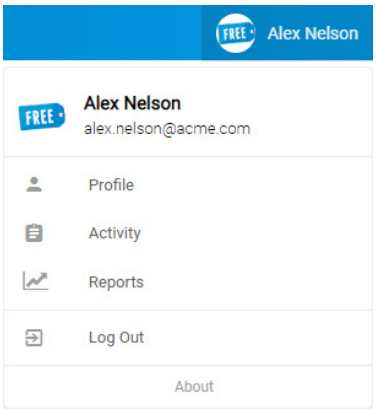

Image 61: Popup menu in the header of the user interface

4.2.5.1 User information

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

- Details
- Security
- Settings
- Search History

Note: The user leaves the profile settings by selecting the name of the IMiS®/wClient application or archive (e.g. IMiS/ARChive 10.2).

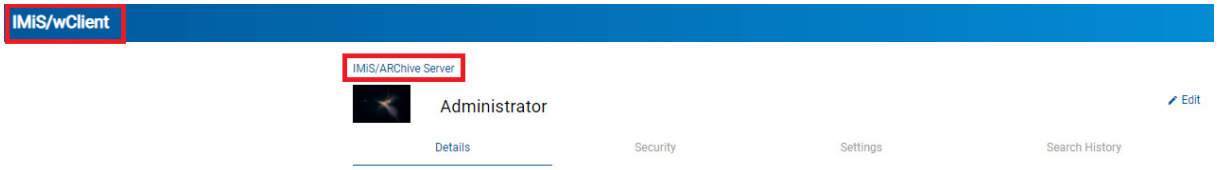

Image 62: Transition from profile settings to the entity review in the archive

4.2.5.1.1 The Details tab

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

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

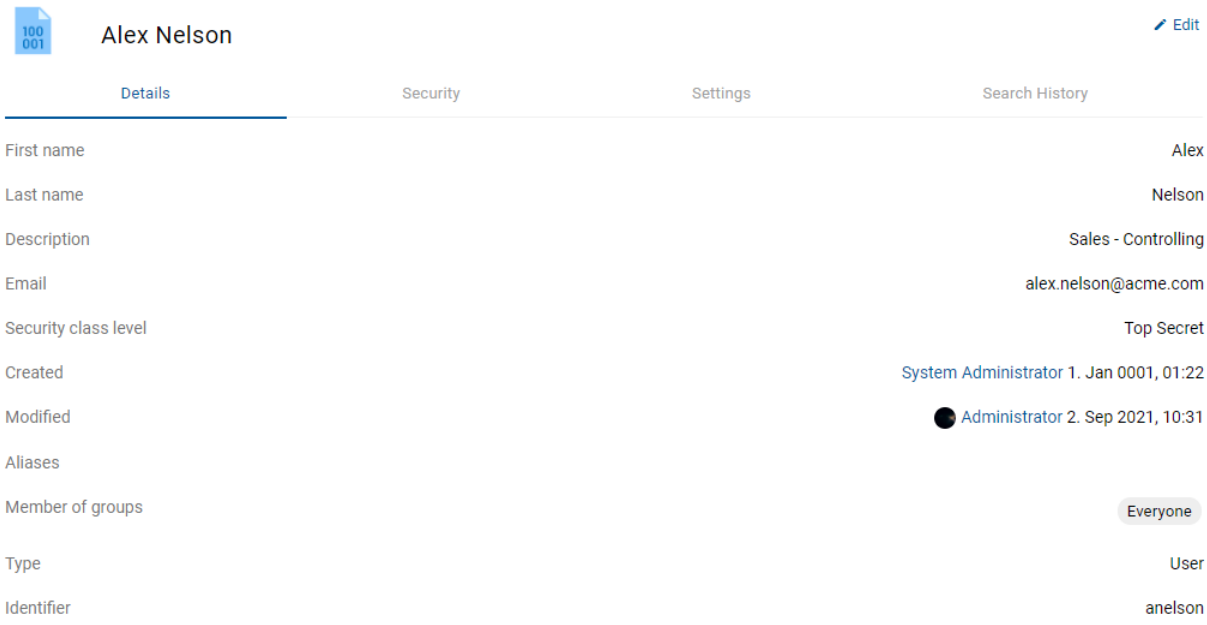

Image 63: Display of the “Basic” tab

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

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

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

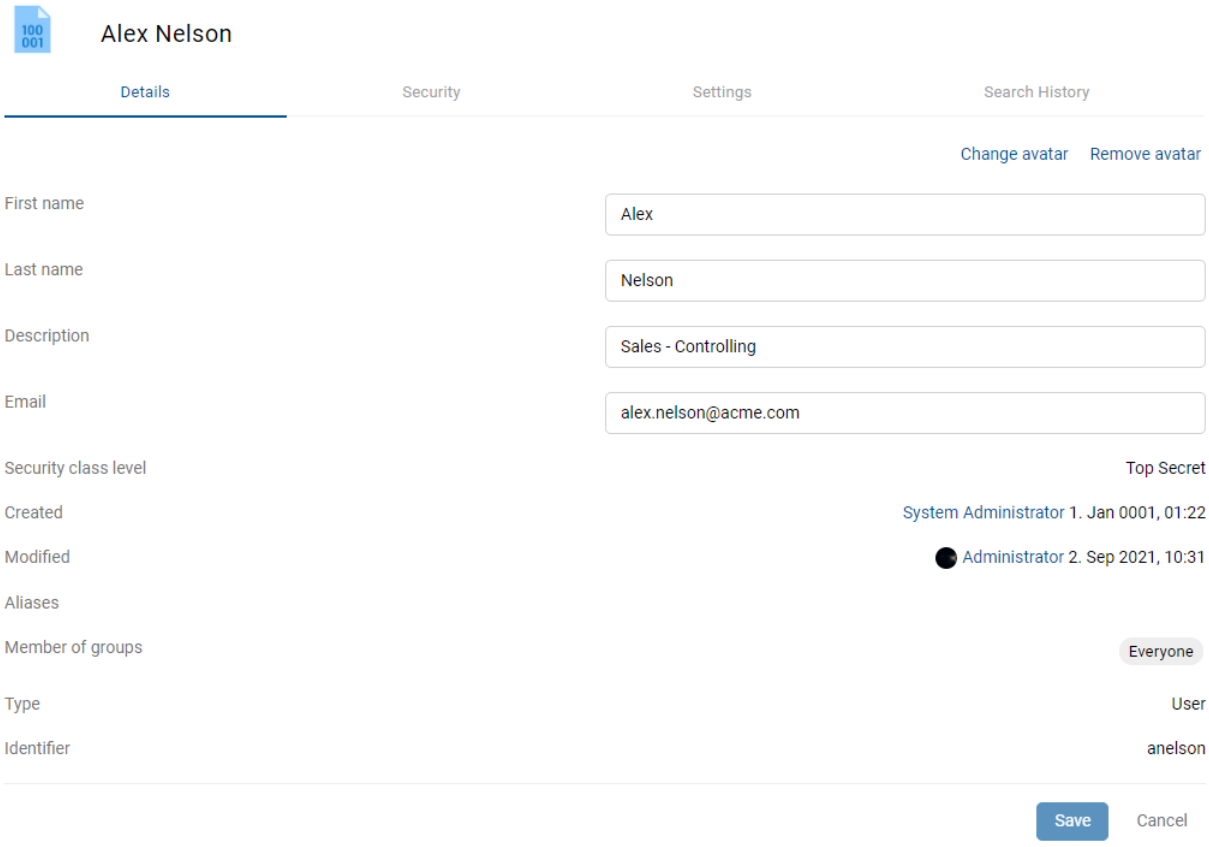

Image 64: Editing user details in edit mode

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

4.2.5.1.2 The Security tab

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

Image 65: Display of the “Security” tab

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

Password

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

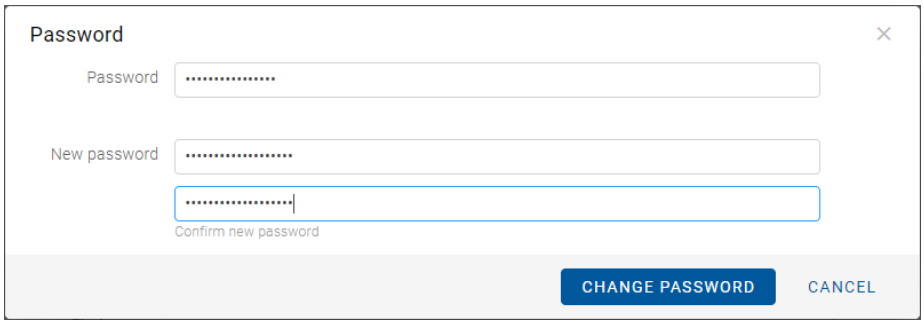

Image 66: Display of the window for changing the user password

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

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

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4.2.5.1.3 The Settings tab

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

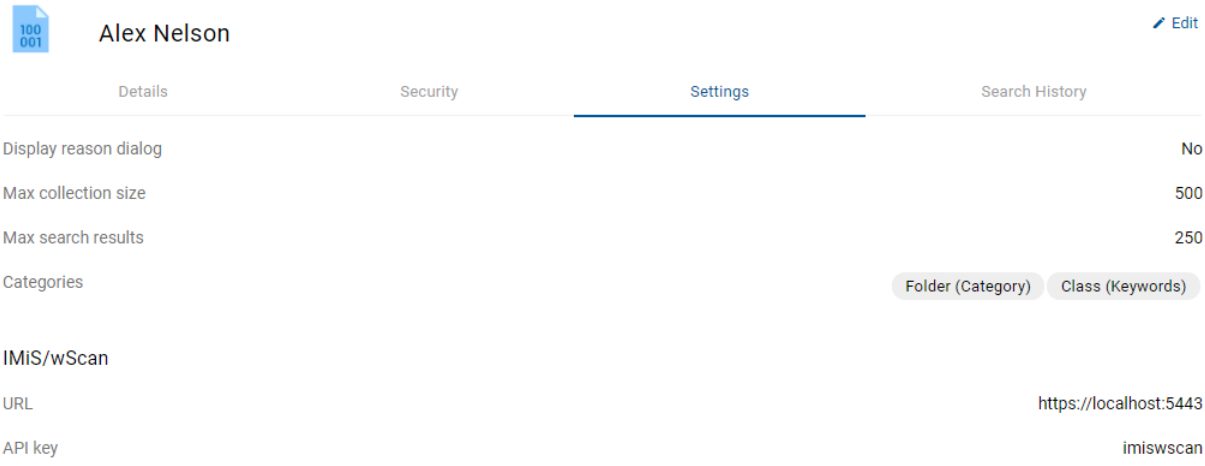

Image 67: View of the “Settings” tab

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

- Display reason dialog

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

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

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

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

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Image 68: Dialog box for disabling the entry of the reason for performing actions

- Max collection size

  By defining the attribute value, the user limits the number of entities shown on the list. The default value is defined in the settings (assets/settings.json).

- Max search results

  By defining the attribute value, the user limits the number of entity search results shown on the list. The default value is defined in the settings (assets/settings.json).

- Categories

  If the user selects a categorized Keywords view (sys:Keywords or sys:Category) in the entity view mode, the categorization settings are saved for the template under which the categorization was performed.

  For more information on categorized views see chapter View mode.

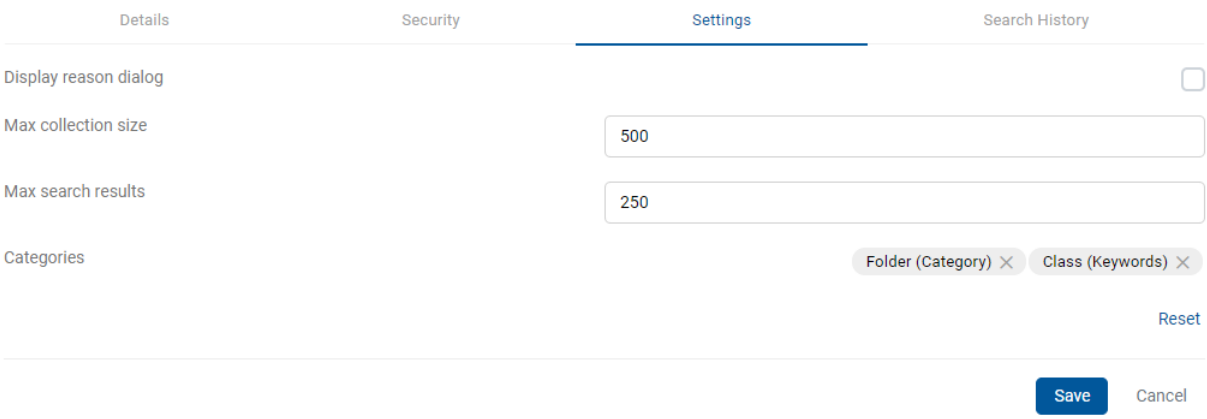

Image 69: Showing the basic settings

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

IMiS®/wScan

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

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

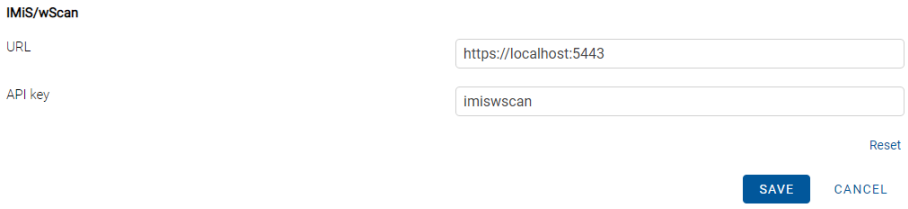

Image 70: Setting the parameters in the "IMiS®/wScan" tab

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

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

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

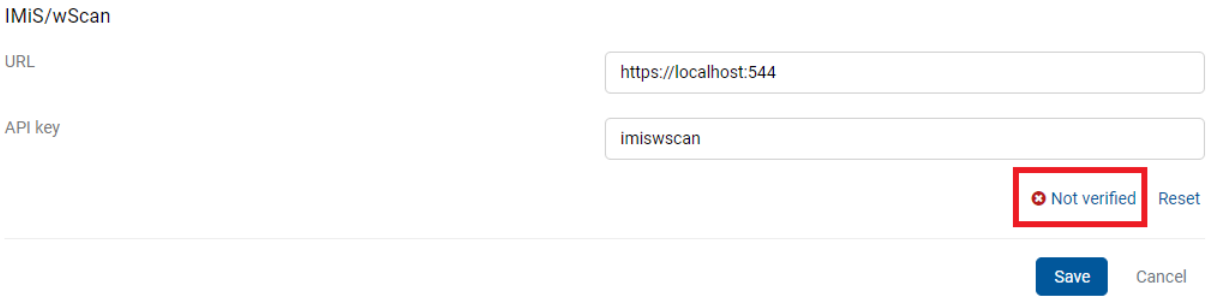

Image 71: Validity of the service address settings not verified

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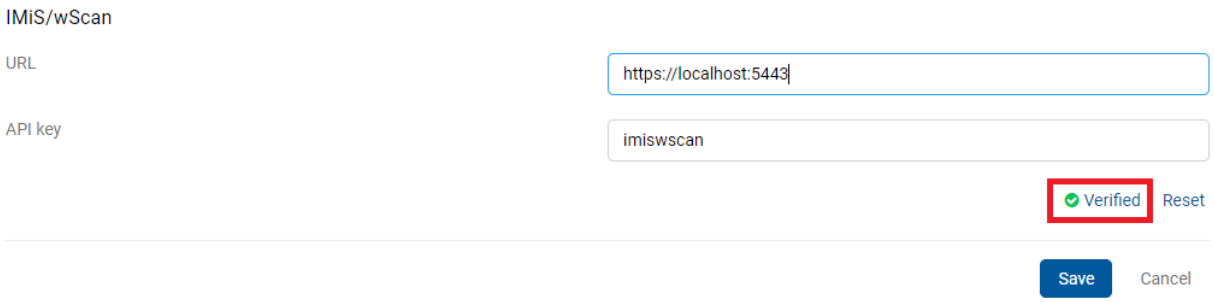

Image 72: Validity of the service address settings verified

4.2.5.1.4 The Search history tab

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

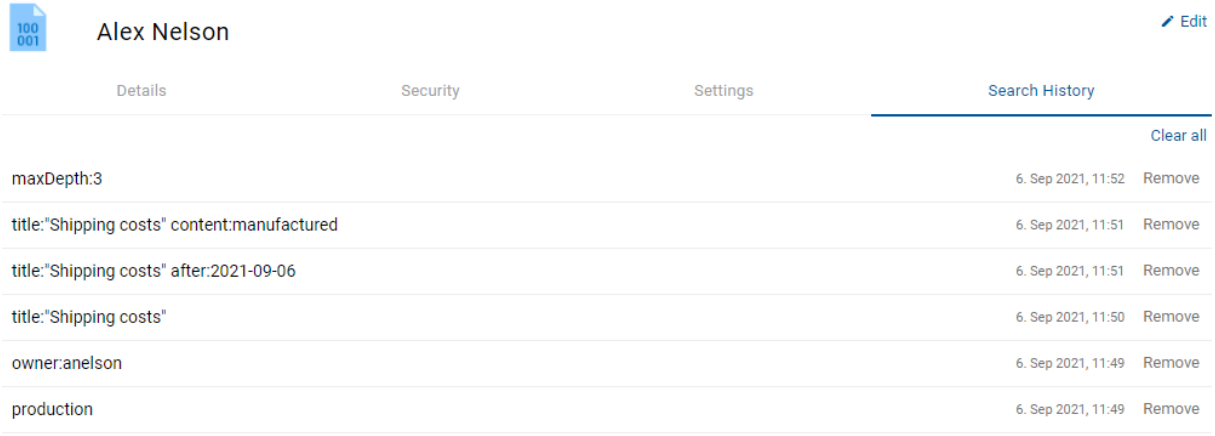

Image 73: View of the “Search history” tab

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

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4.2.5.2 Information about audit log events

By selecting the command “Activity”, the user is shown information about audit log events for the selected user and entity. More information on the Activity action is available to the user in the chapter Searching audit log events.

4.2.5.3 Reports

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

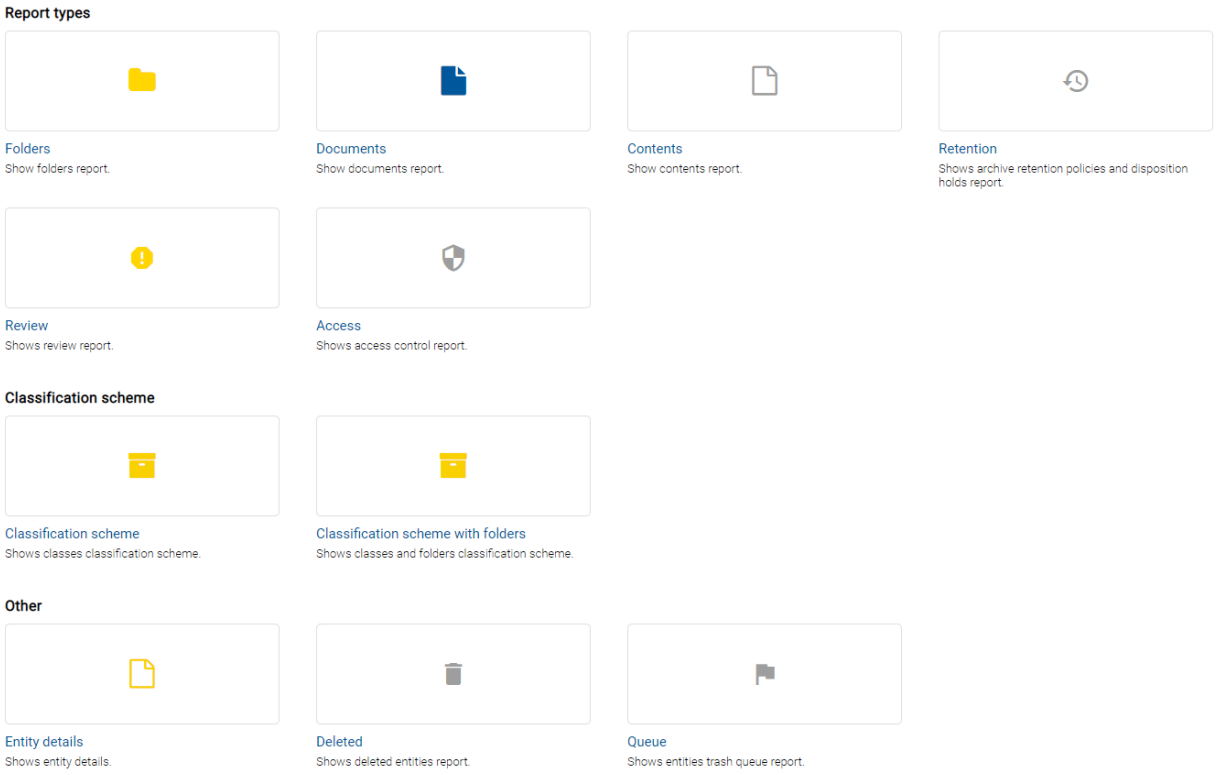

Image 74: Report types

For more information on specific report see chapter Reporting.

4.2.5.4 Logout

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

4.2.5.5 About

By selecting the "About" command, the user is shown information about the application and licensing terms. More information on the About command is available to the user in the chapter About.

4.2.5.6 Display of entities

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

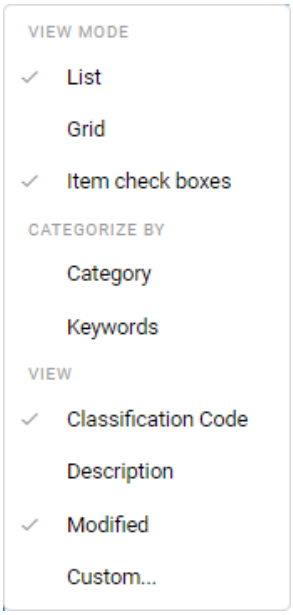

Image 75: Setting the display of entities

4.2.5.6.1 View mode

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

- List
- Grid
- Item check boxes.

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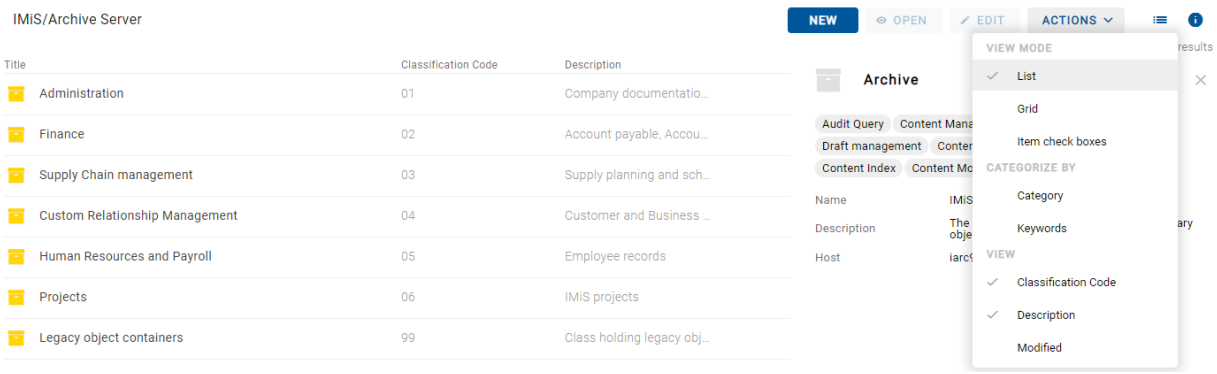

Image 76: Entities shown on a list

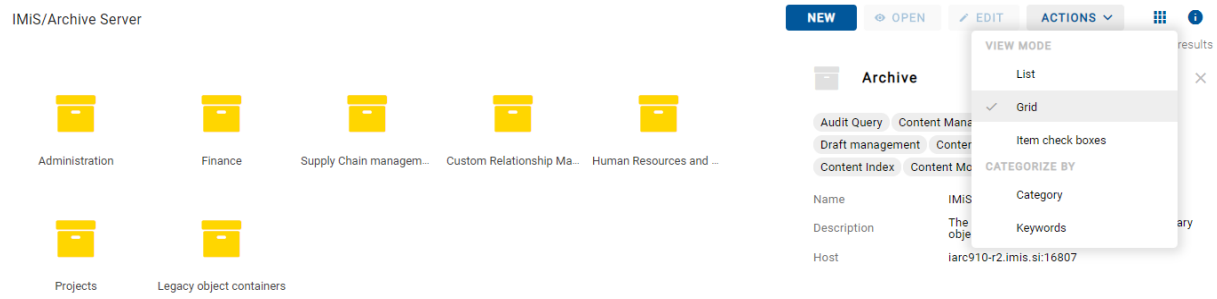

Image 77: Entities shown in a grid

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

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

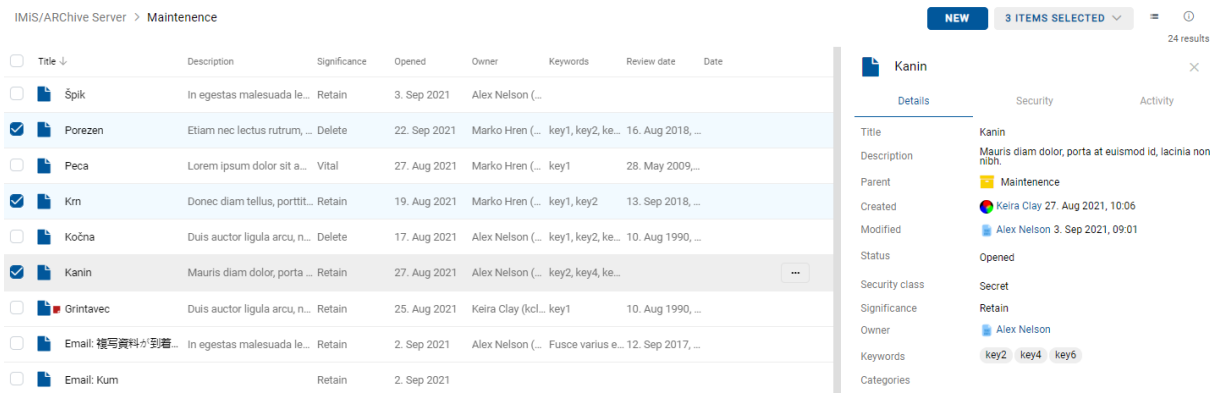

Image 78: Selecting individual entities for move and deletion

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

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

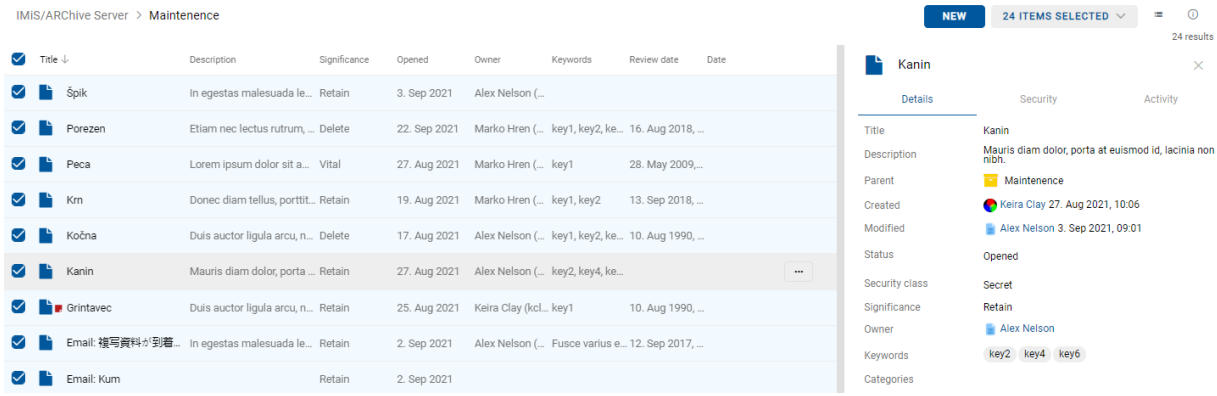

Image 79: Selecting all the loaded entities for move or deletion

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

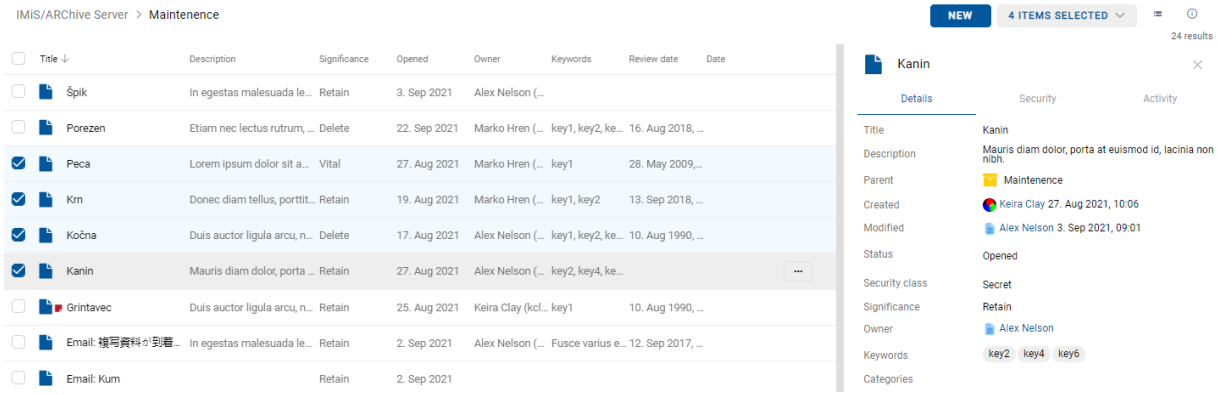

Image 80: Selecting a part of the loaded entities for move or deletion

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

- Move
- Delete
- Deselect all.

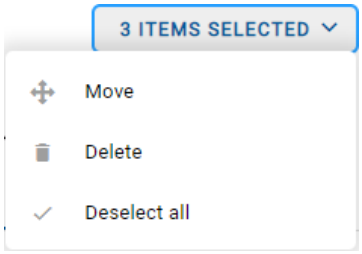

Image 81: Set of actions on selected entities

The procedure of moving multiple entities is the same as the procedure of moving a single entity. For more information see chapter Entity move.
Likewise, the procedure of deleting multiple entities is the same as the procedure of deleting a single entity. For more information see chapter Deletion of an entity.

4.2.5.6.2 Categorization

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

- Category
- Keywords.

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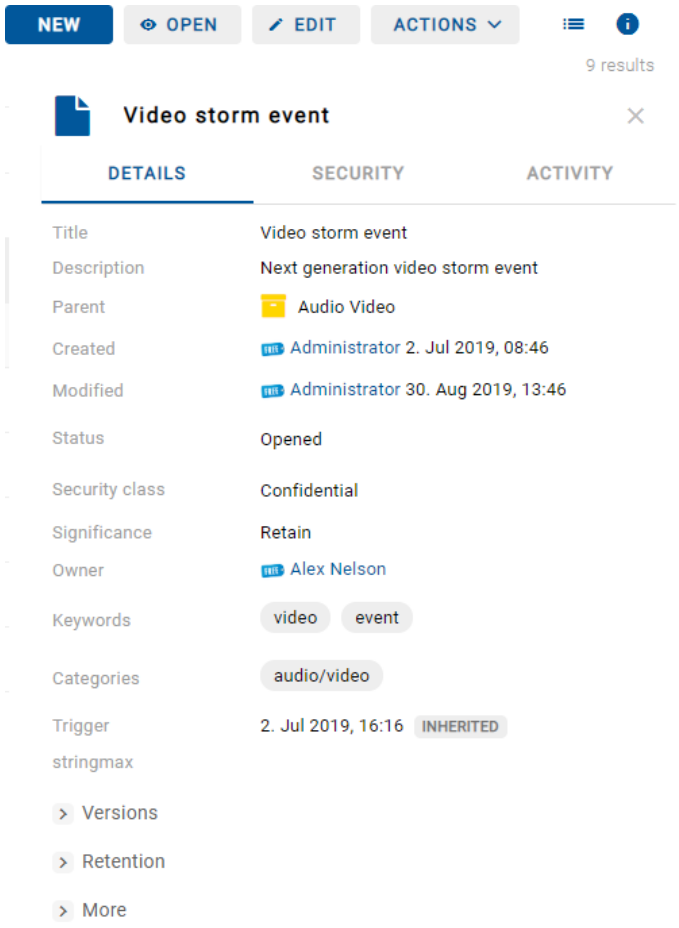

Image 82: An example of an entity with a defined value of the Categories attribute

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.

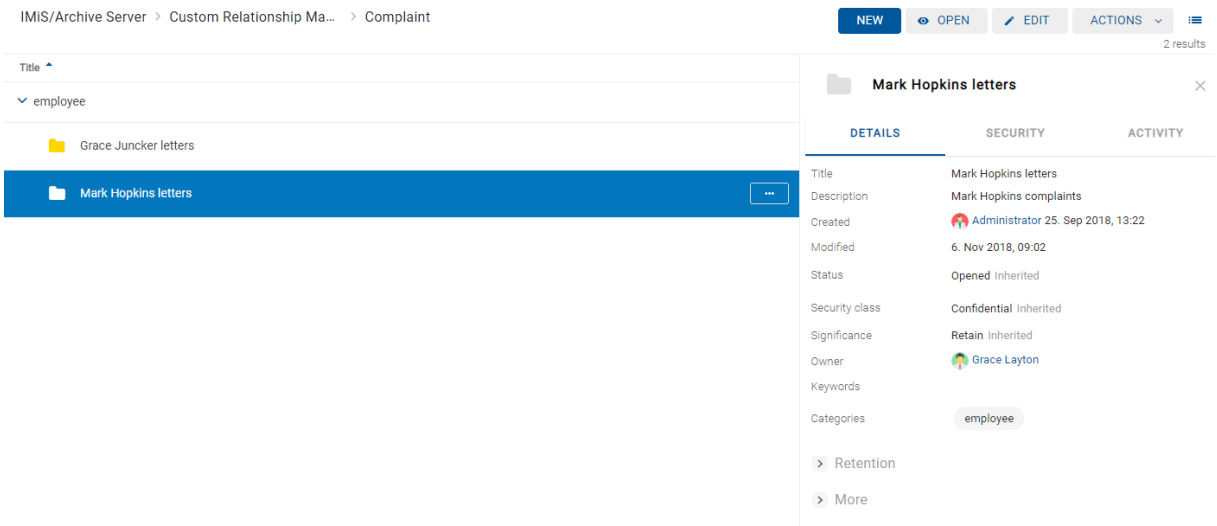

Image 83: A categorized Categories view

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.

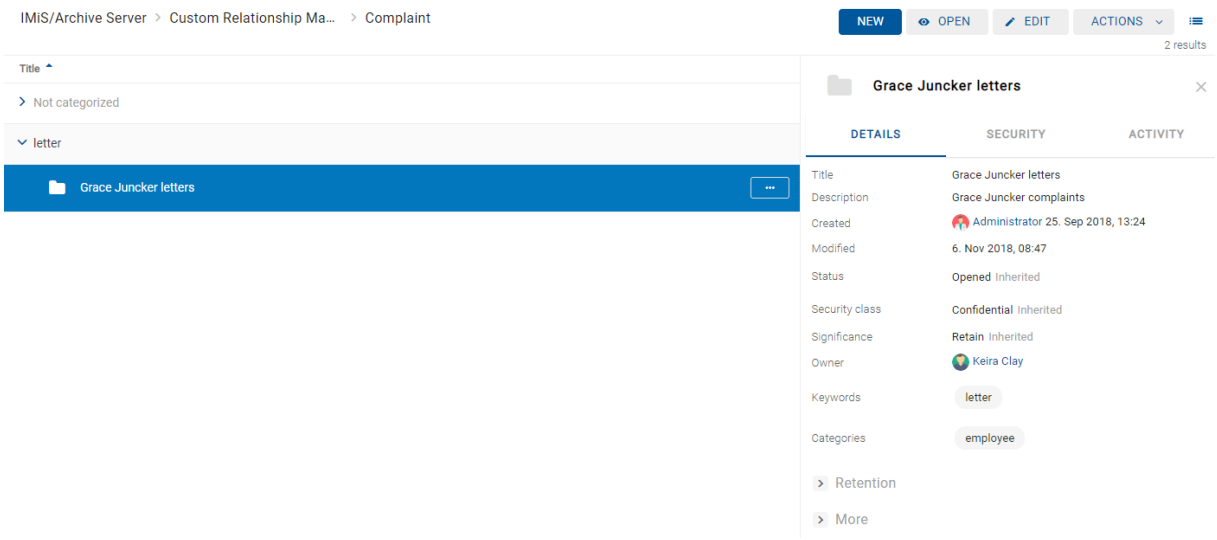

Image 84: A categorized Keywords view

4.2.5.6.3 View

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

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

Table 8: Setting the view of columns

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

Table 9: Setting the width of the displayed column

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collections.views	Description
archives	Collection of archive identifiers.
profile	Profile identifier from collections.profiles.
members	Collection of directory entities.
classification_code	Collection of classification codes.
context	Display context (optional). The set of values: - ARCHIVE - MY_ENTITIES - DRAFTS - DIRECTORY - REVIEWS - EXPORT - IMPORT - DELETED - DISPOSED - QUEUE.

Image 85: Setting the collection of displayed columns

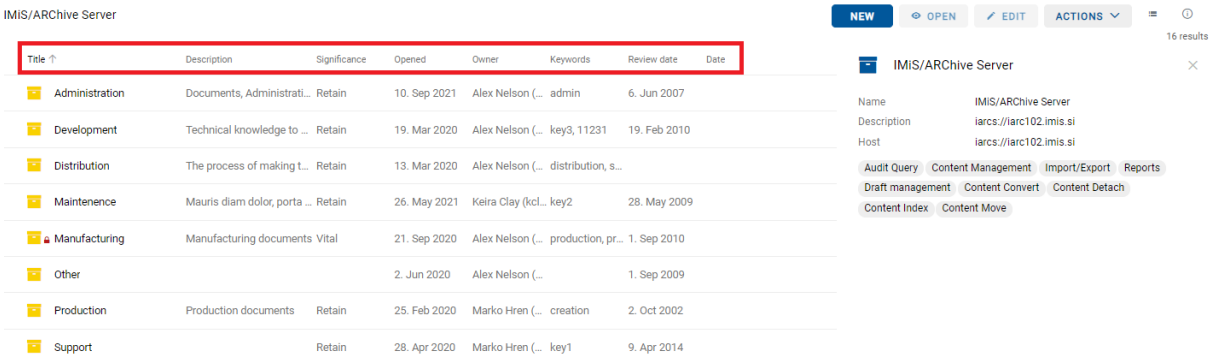

Image 86: Default settings for the view of the columns of selected attributes

In the "View" set the user can freely define which of the following columns of selected attributes will be displayed in the central view:

- Classification code
- Description
- Modified
- Custom.

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If the actions "Classification code", "Description" or "Modified" are selected, the mentioned columns of selected attributes are added to or removed from the view of the entities list. The setting is saved to the user profile to the file client:settings.json and is available to the user until the next modification.

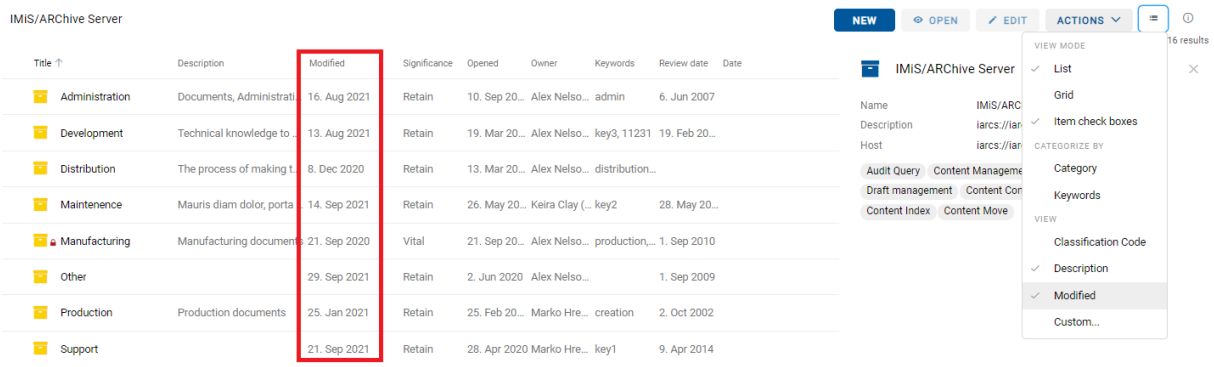

Image 87: View of an added "Modified" column of selected attributes

If the user selects the action "Custom", the user can select the columns of selected custom attributes. The user can define which attributes will be displayed, and the display order and mode:

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

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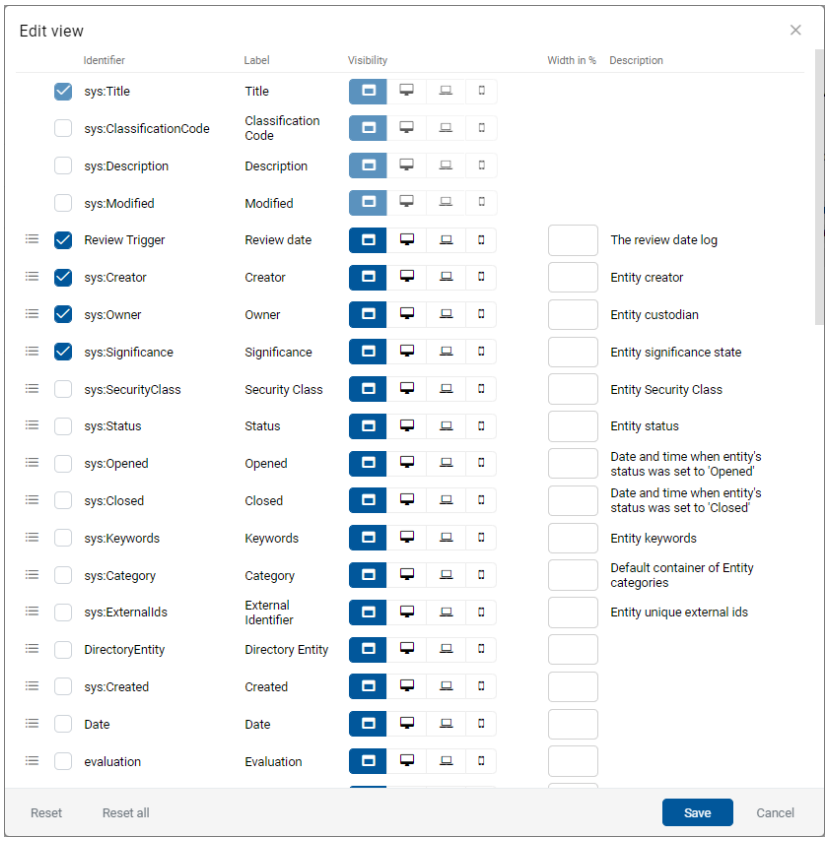

Image 88: Selecting the columns of selected custom attributes

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

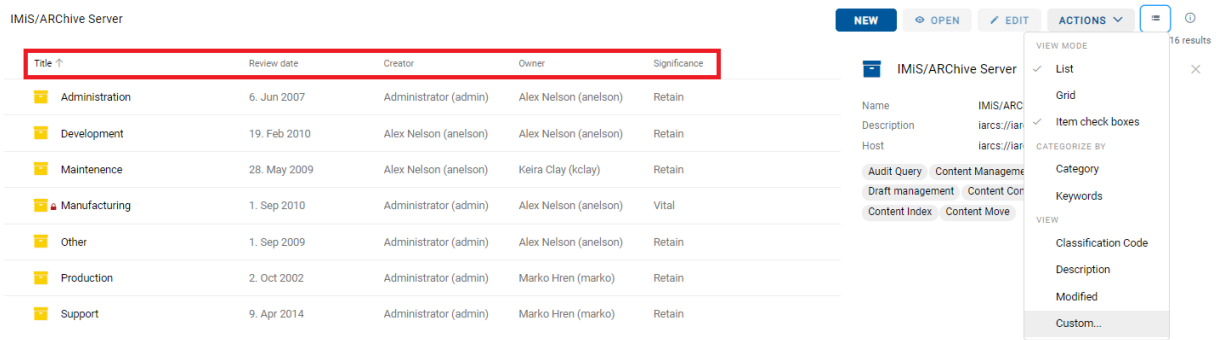

Image 89: View of the columns of selected custom attributes

After saving to the file client:settings.json, the settings will be available to the user until the next modification.

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collections.views	Description
classification_code	The classification code.
context	Display context (optional). The set of values: - ARCHIVE - MY_ENTITIES - DRAFTS - DIRECTORY - REVIEWS - EXPORT - IMPORT - DELETED - DISPOSED - QUEUE.
columns	Collection of displayed columns. The collection type can be object or string.

Table 10: Setting the view

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

Table 11: Setting the collection of displayed columns

4.2.6 Search

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

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

For more information on search options see chapter Search functions.

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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.

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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.

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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.

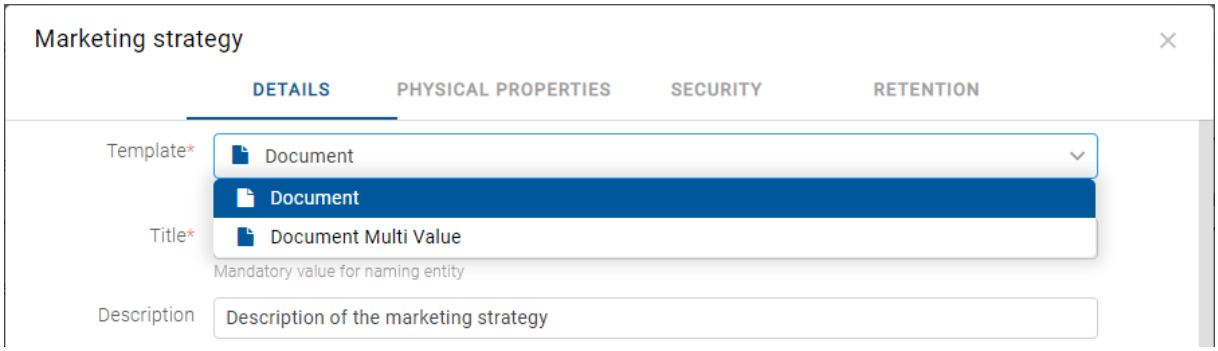

Image 90: Modifying a template in editing mode

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.

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4.3.2.1.1 Creating a root class

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

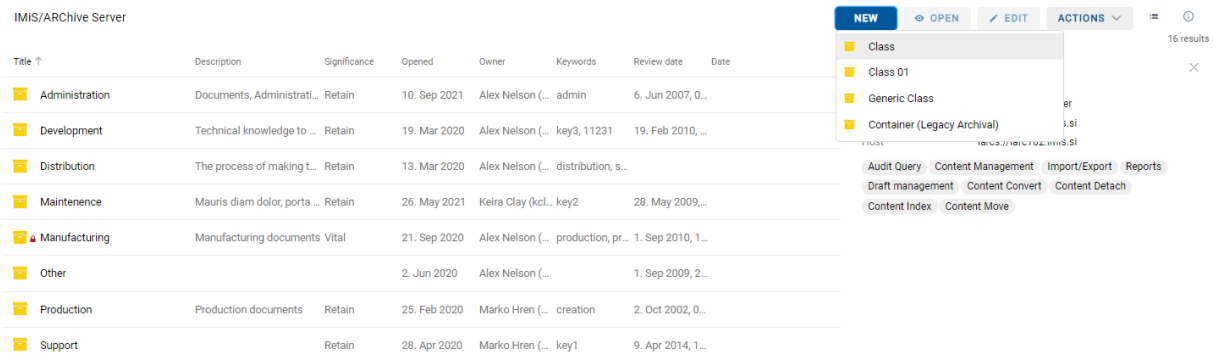

Image 91: Selecting a template from the list

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

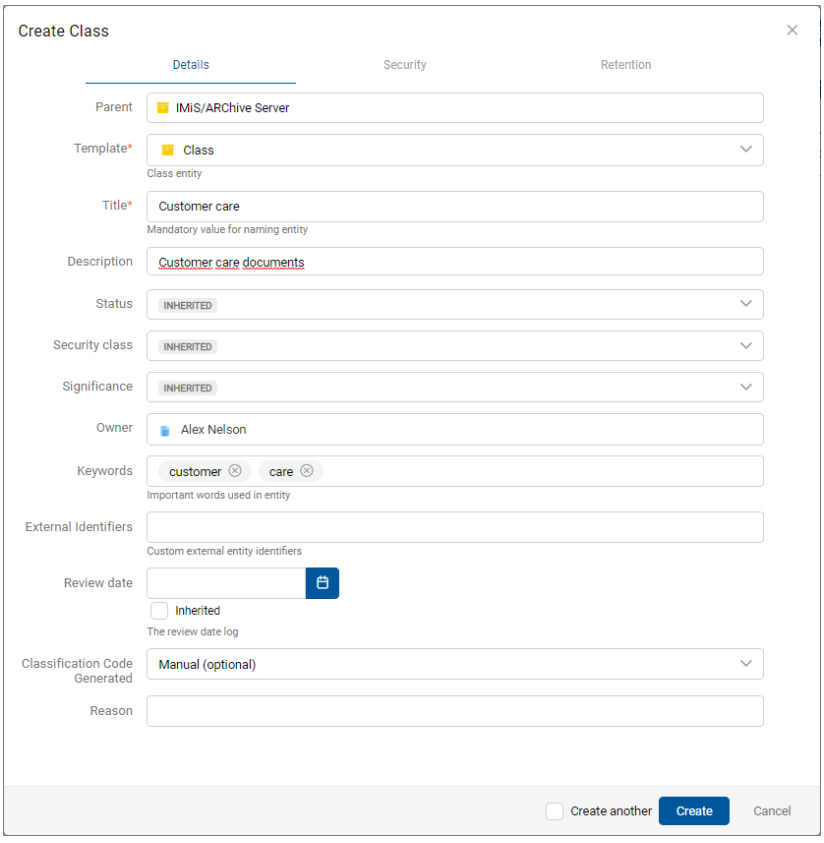

Image 92: Creating a root class

4.3.2.1.2 Creating subentity

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

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

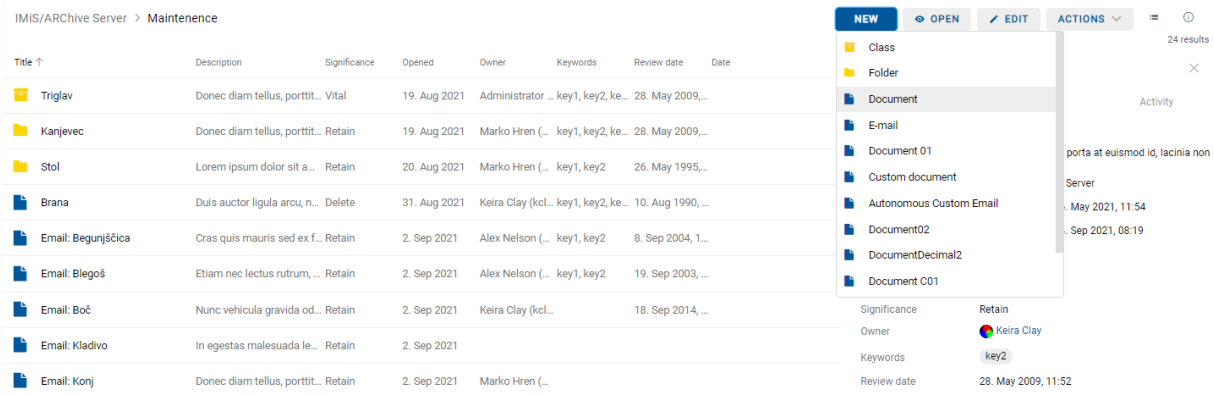

Image 93: Display of contained entities.

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

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

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

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

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

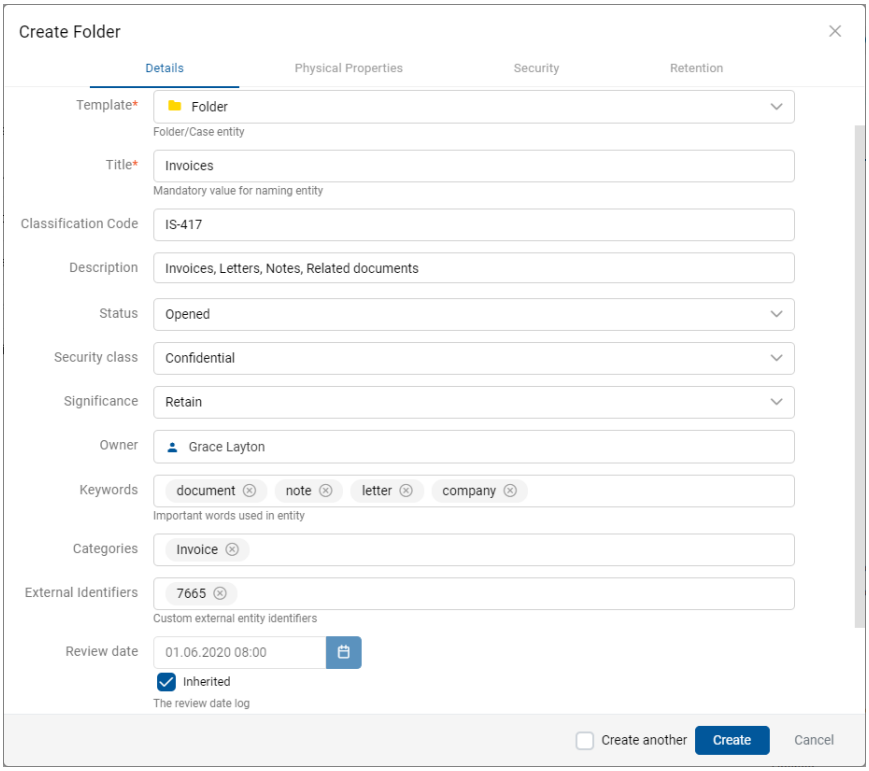

Image 94: Display of creating a new document

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

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

4.3.2.2 Entering entity metadata

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

The order of attributes on the list is defined by the order of the template attributes.
The following can be edited in the web administration interface IMiS®/wAdmin.
For more information see chapter The Template folder in the IMiS®/ARChive Server Manual.

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

Image 95: Entry of required metadata

Attribute entry fields are as follows:

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

Image 96: Entry of text metadata

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

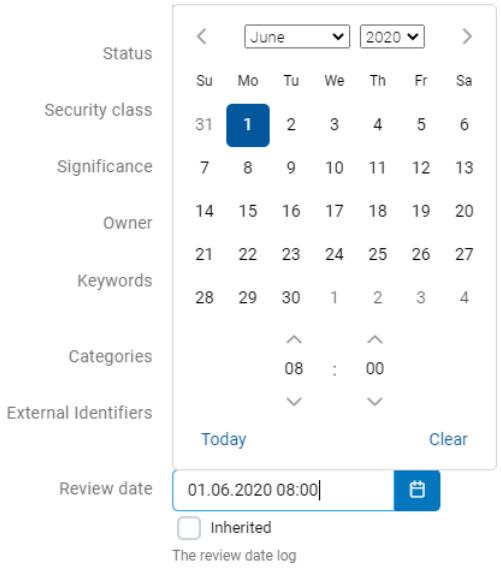

Image 97: Entry of date and time metadata

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.

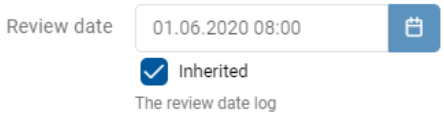

Image 98: Displaying the inherited value of the date field of the parent entity

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

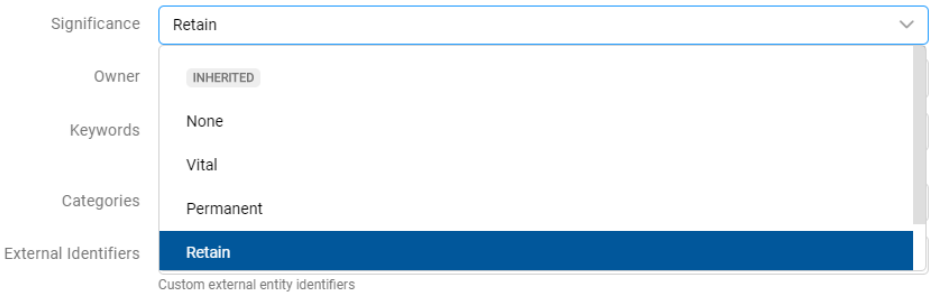

Image 99: Entry of metadata with predefined values

- 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.

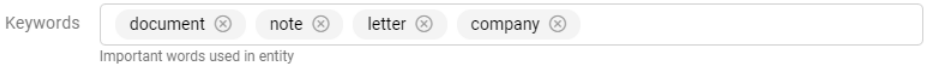

Image 100: Entry of multiple values into a field

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

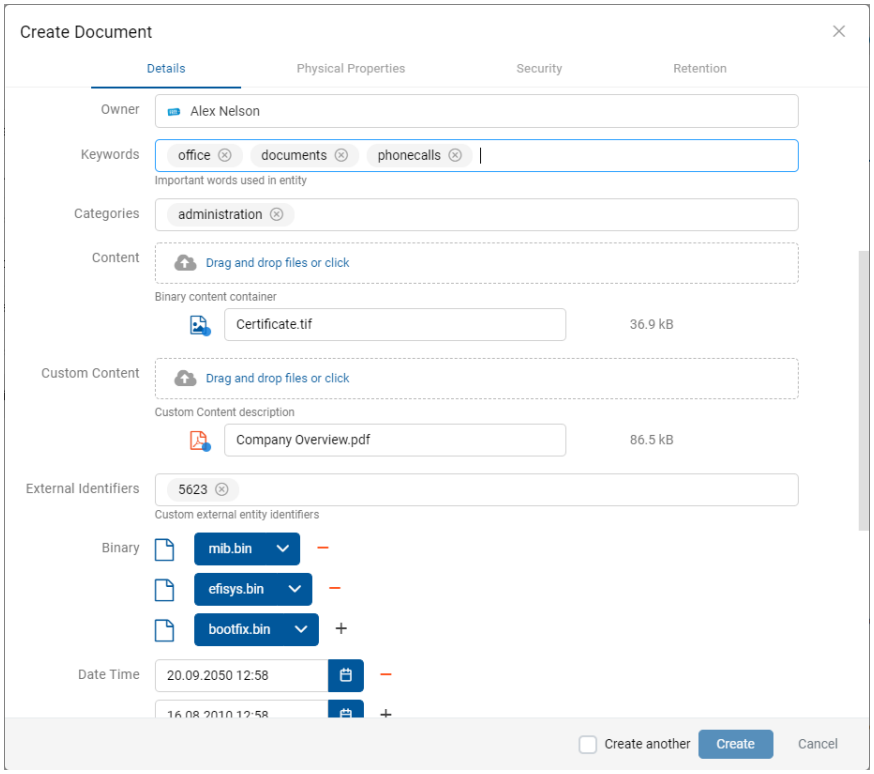

Image 101: Entering multiple values of an attribute

- 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 » - «.

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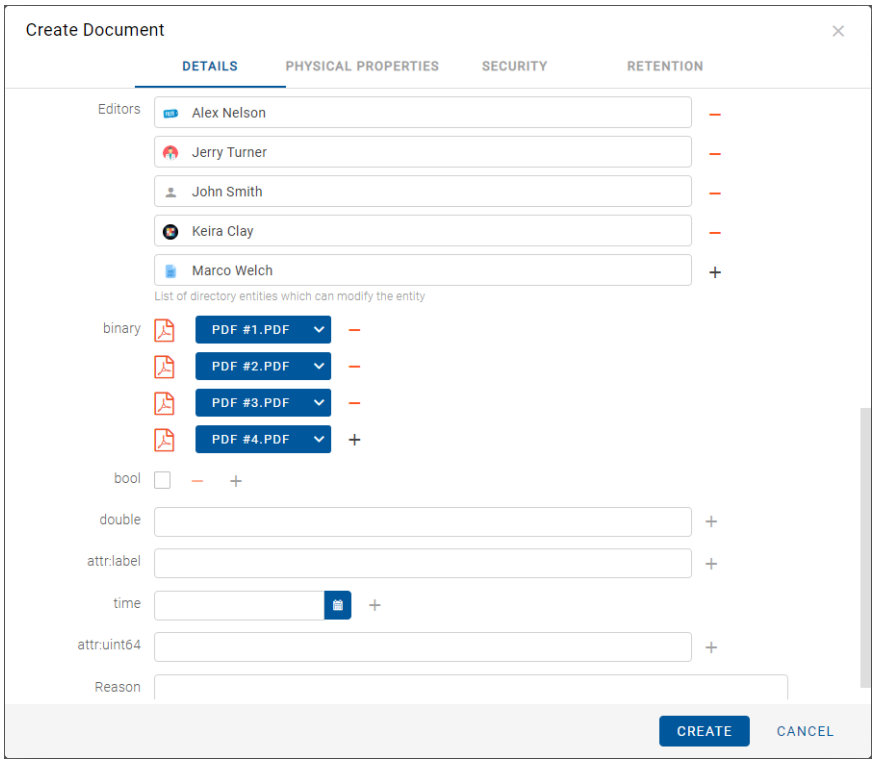

Image 102: Entering the values of multiple directory entities

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.

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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.

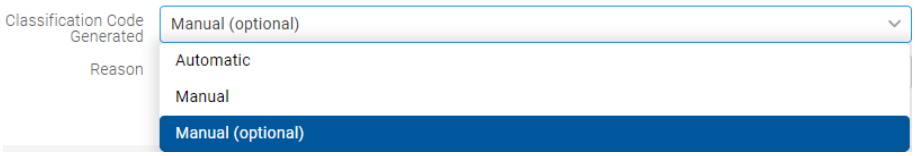

Image 103: Selecting the type of classification code entry for the contained entity

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.

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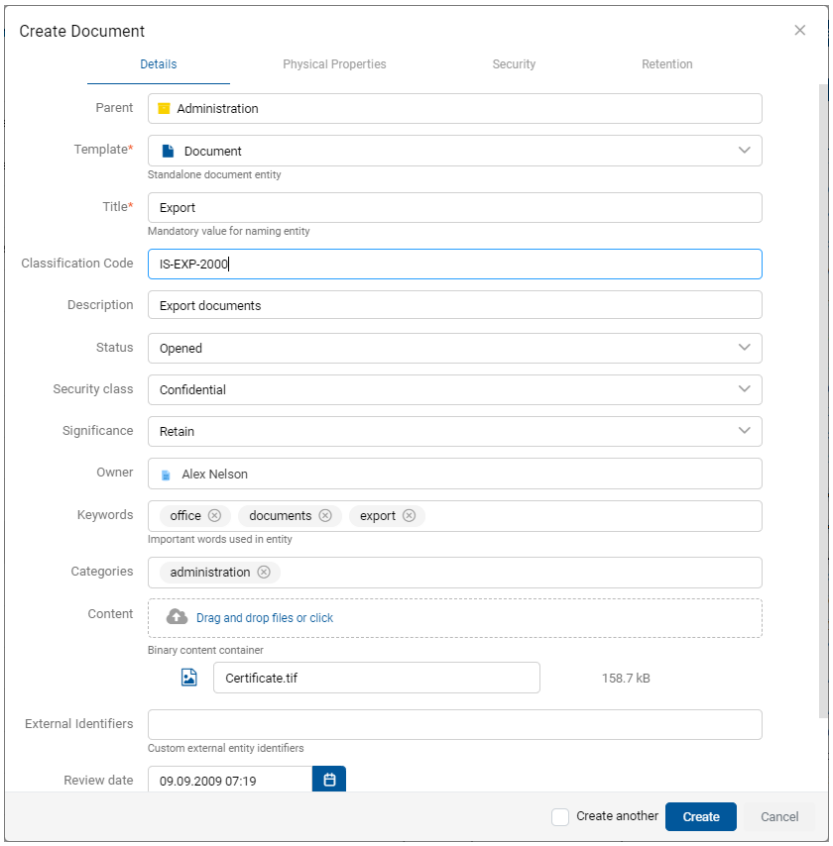

Image 104: Manual entry of a child entity's classification code

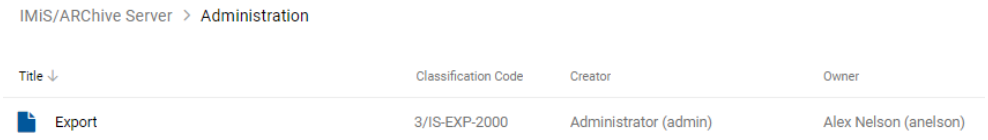

Image 105: Display of manually entered classification code

4.3.2.4 Setting an entity's security class

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

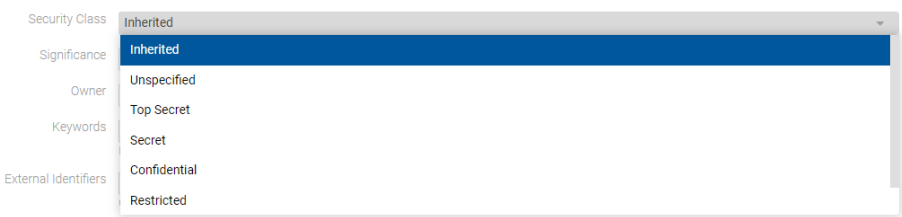

Image 106: Specifying the security class of a new entity

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 107: 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.

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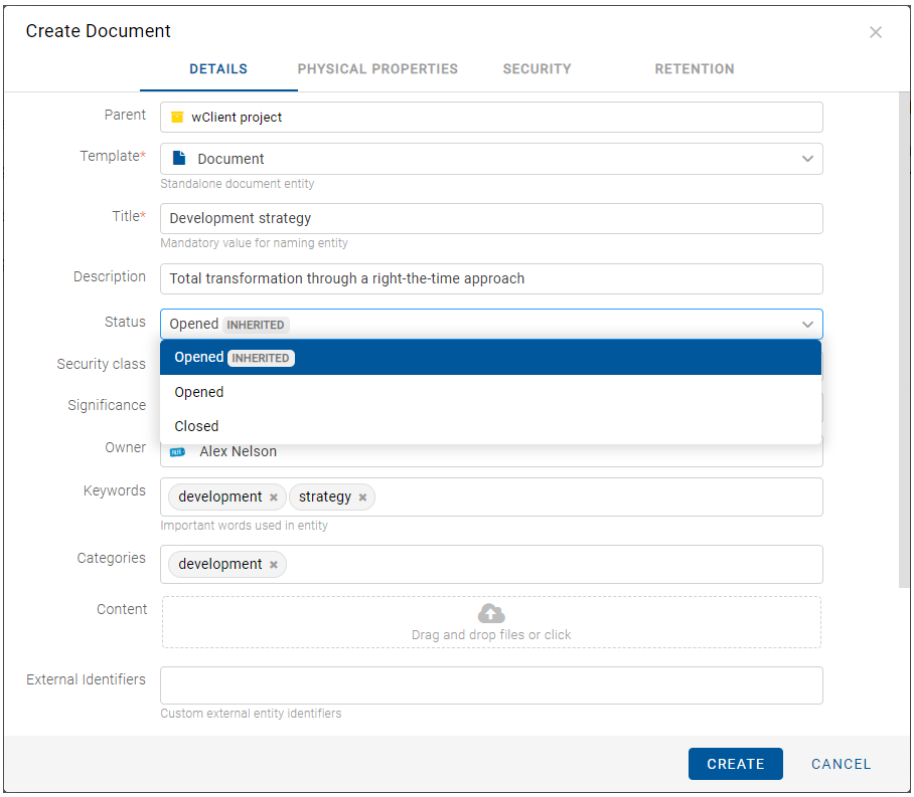

Image 108: Specifying the status of a new entity

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.

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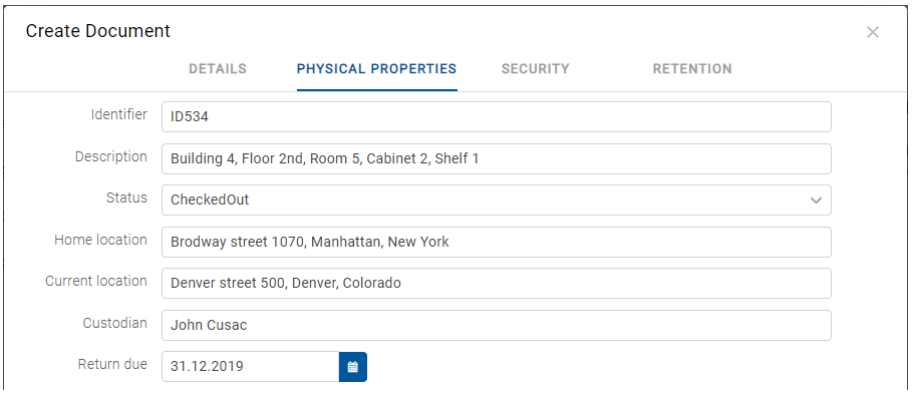

Image 109: Display of the entry of physical content metadata

The user can specify all of the attribute values except for Date of status change, which is automatically filled in with the date of the last change of the Status attribute.
When capturing physical content, set the Status to the Checked-In value.
For more information on physical content attribute description see chapter Physical content attributes.

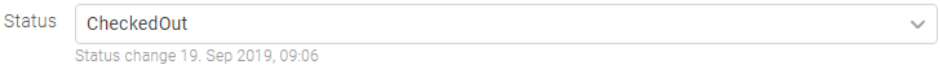

Image 110: The date of the last change of the Status attribute

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.

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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.

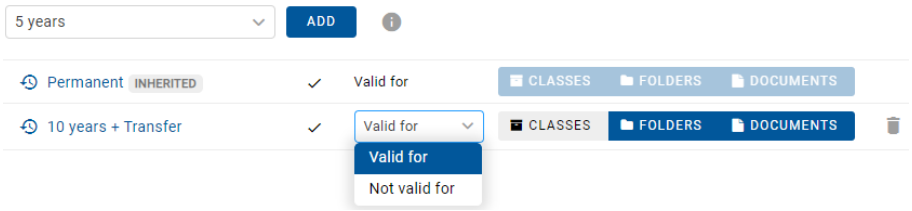

Image 111: Selecting validity for a specific type of entity

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

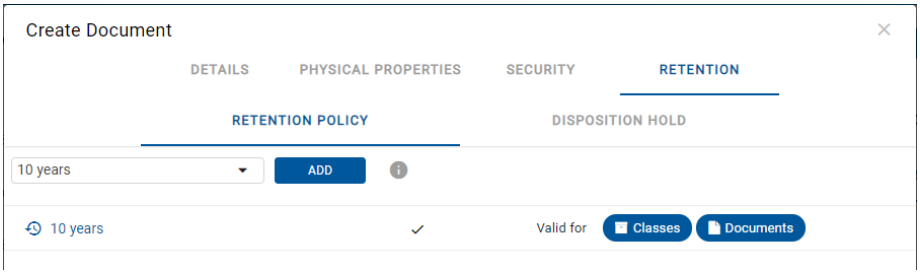

Image 112: Display of the »Retention« tab

4.3.2.8 Saving an entity

Before saving and 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.

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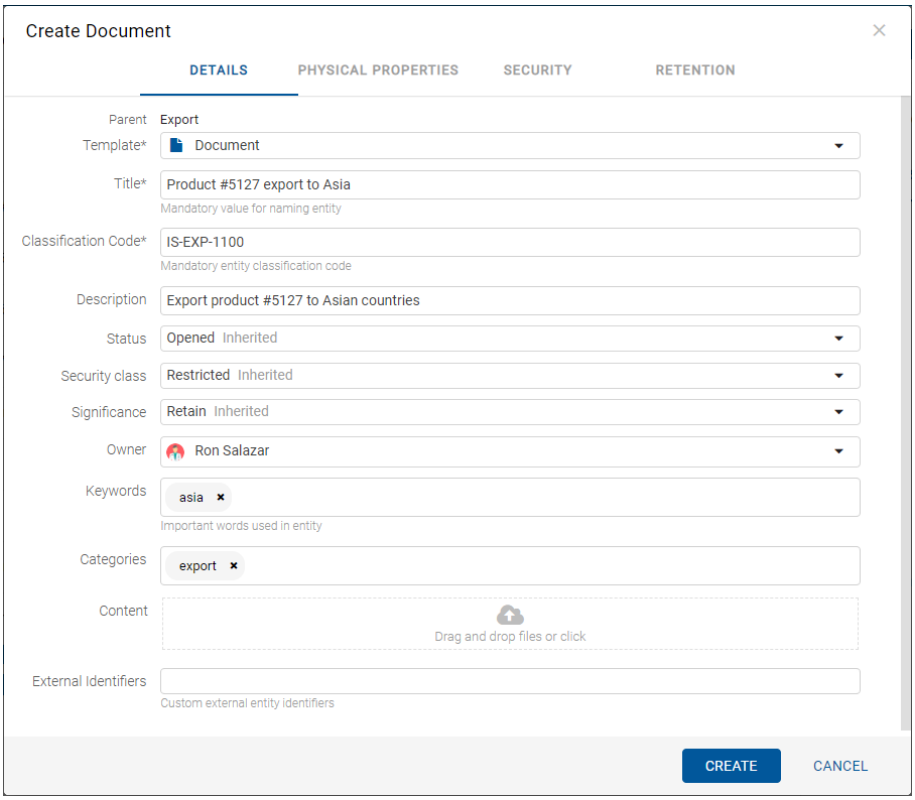

Image 113: Saving a new or modified entity

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.

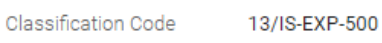

Image 114: Example classification code

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- 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.

Image 115: Example creator of entity

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

Image 116: 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.

Image 117: 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.

Image 118: 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.

Image 119: Example date and time an entity was opened

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

Image 120: Example date and time an entity was closed

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

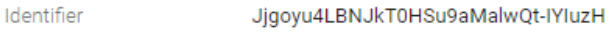

Image 121: Example entity identifier

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.

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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.

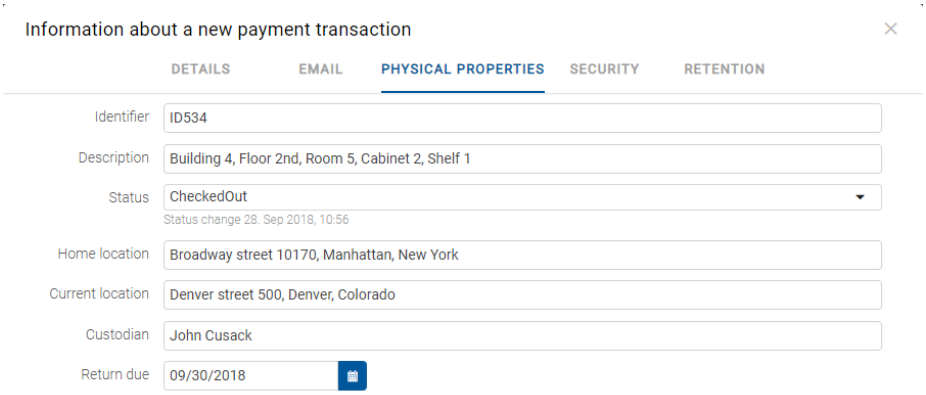

Image 122: Editing of the physical content metadata

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.

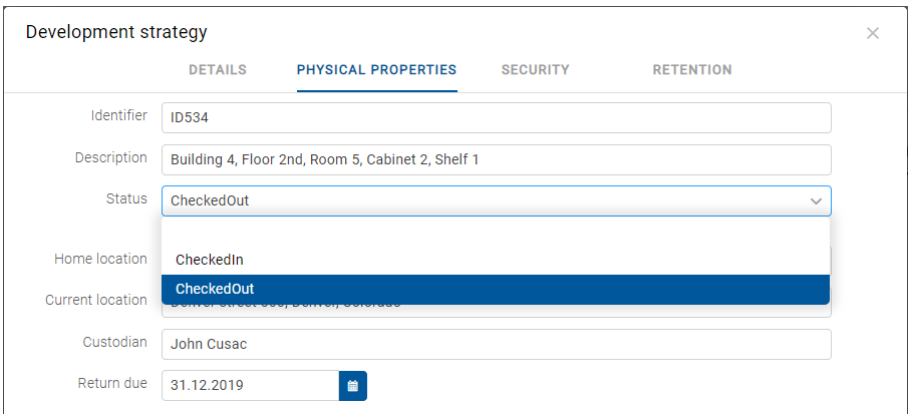

Image 123: Popup menu for selecting the status of the physical content

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4.3.3.4 Editing access rights

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

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

4.3.3.4.1 Editing access rights for an entity

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

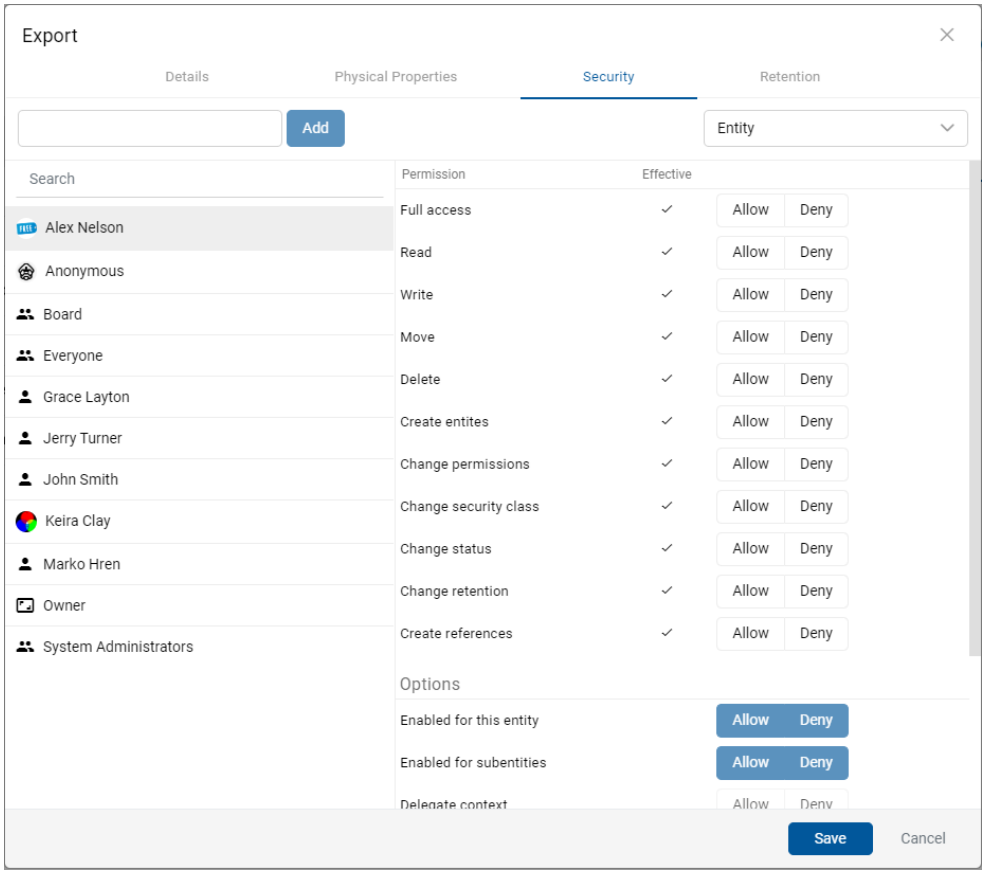

Image 124: Security tab in editing mode

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.

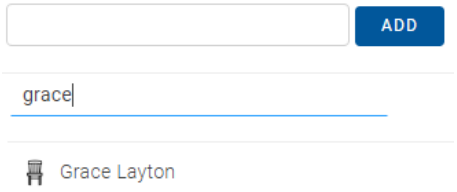

Image 125: Searching a directory entity on a list

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.

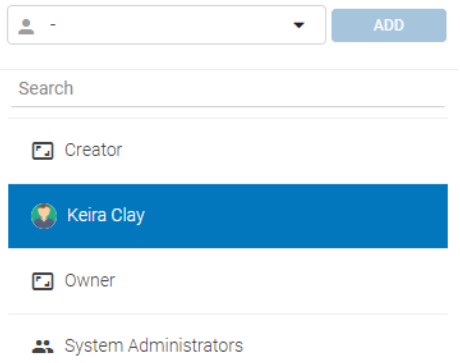

Image 126: List of directory entities with access rights to the entity

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.

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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.

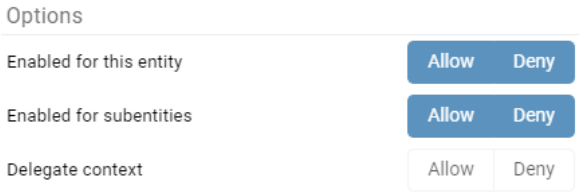

Image 127: Setting the inheritance of access permissions to contained entities

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.

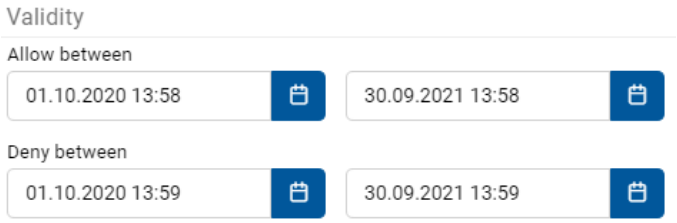

Image 128: Setting the temporal validity of access permissions

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

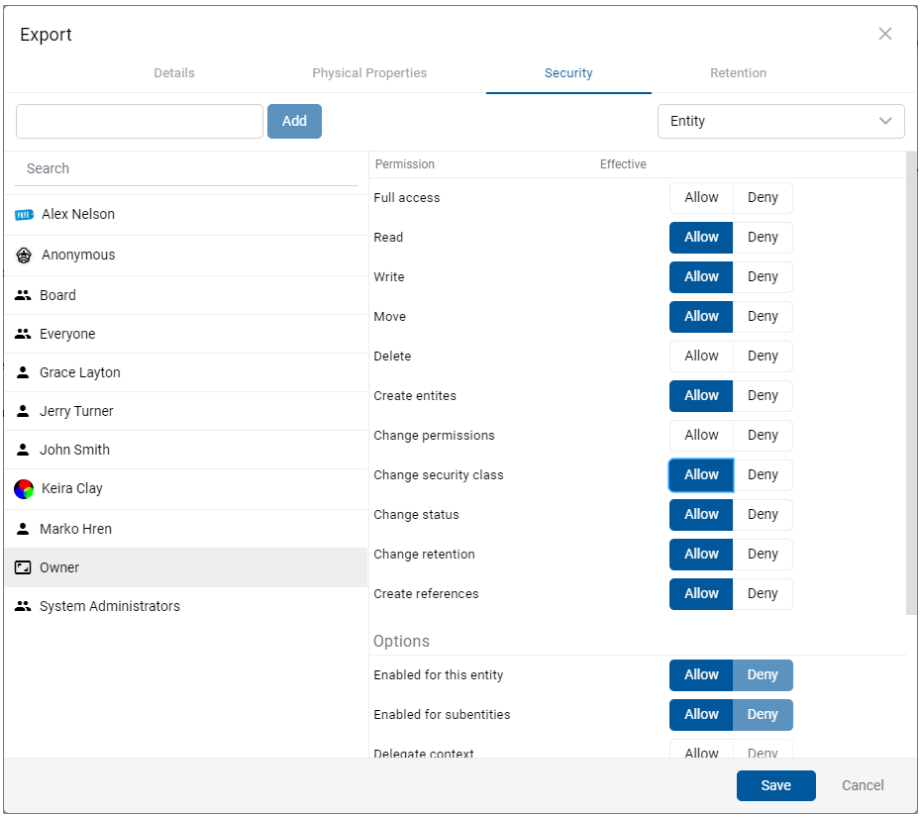

Image 129: A list of access permissions for a specific attribute

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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.

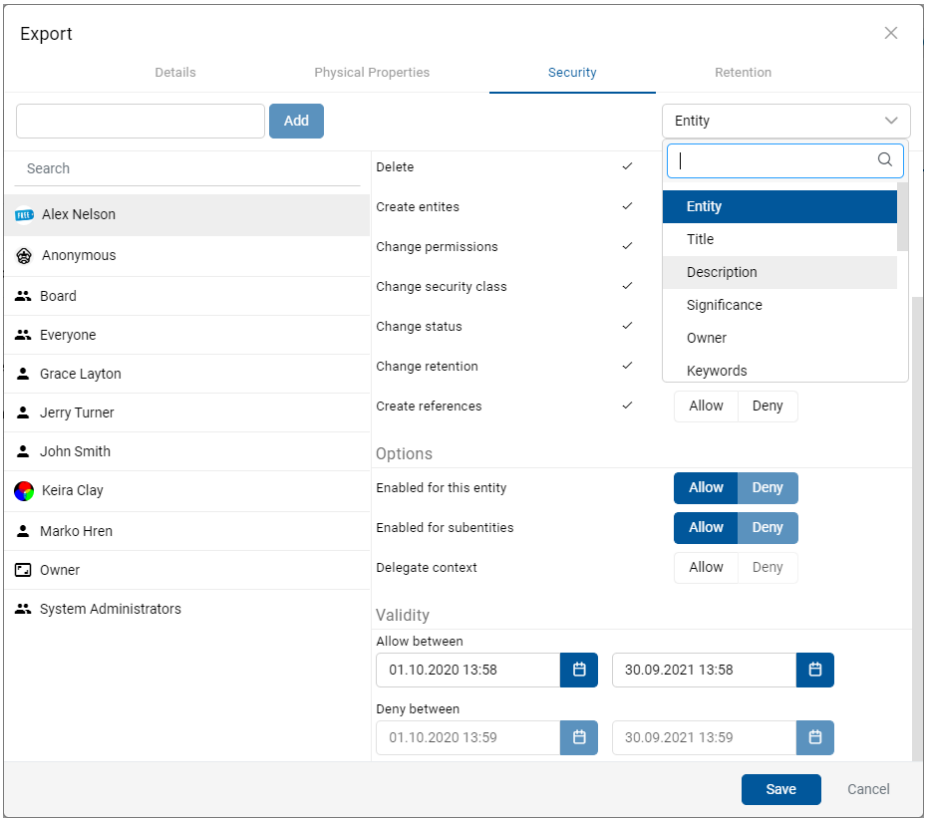

Image 130: Popup menu for selecting access rights to a selected metadata

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.

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

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

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

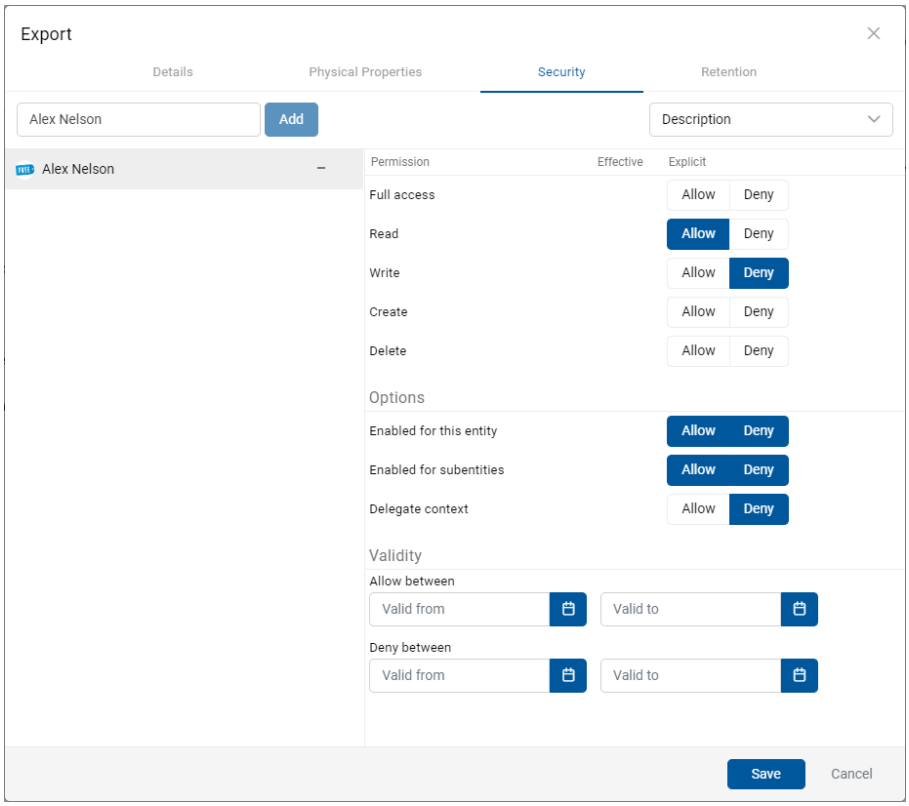

Image 131: List of user permissions on the selected metadata

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.

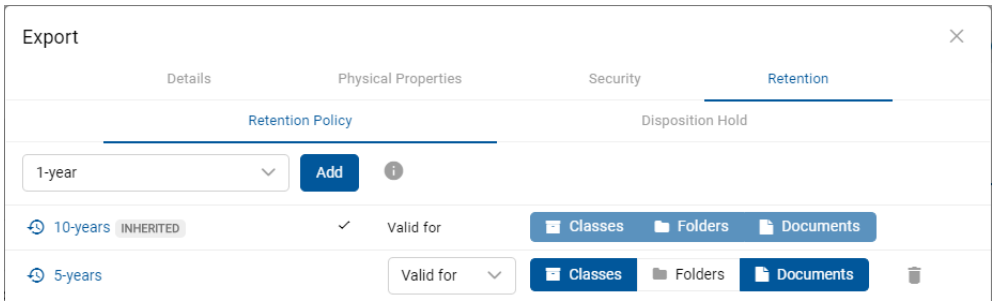

Image 132: The Retention policy tab in editing mode

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.

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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.

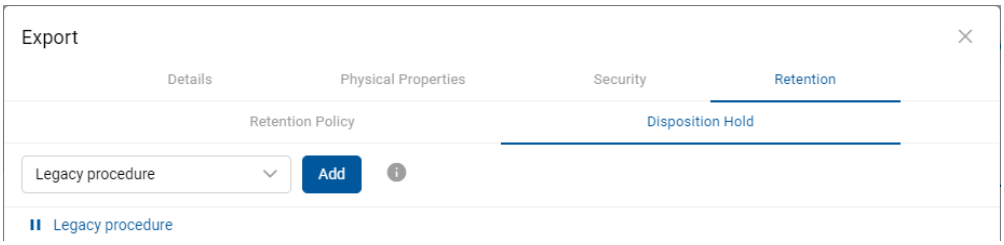

Image 133: The Disposition hold tab in editing mode

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

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

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

4.3.3.6 Changing the classification code of an entity

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

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

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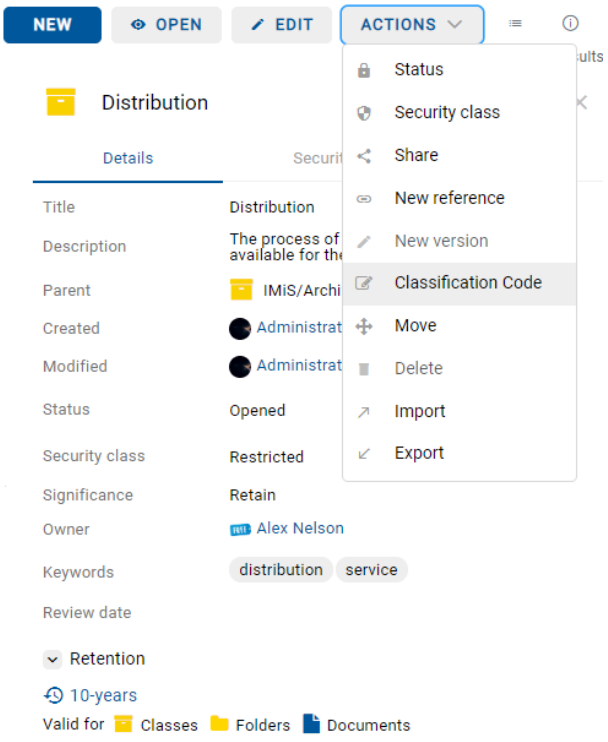

Image 134: Selecting the classification code

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

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

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

Image 135: Selecting the classification code and giving the reason for the change

4.3.3.7 Changing the status of an entity

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

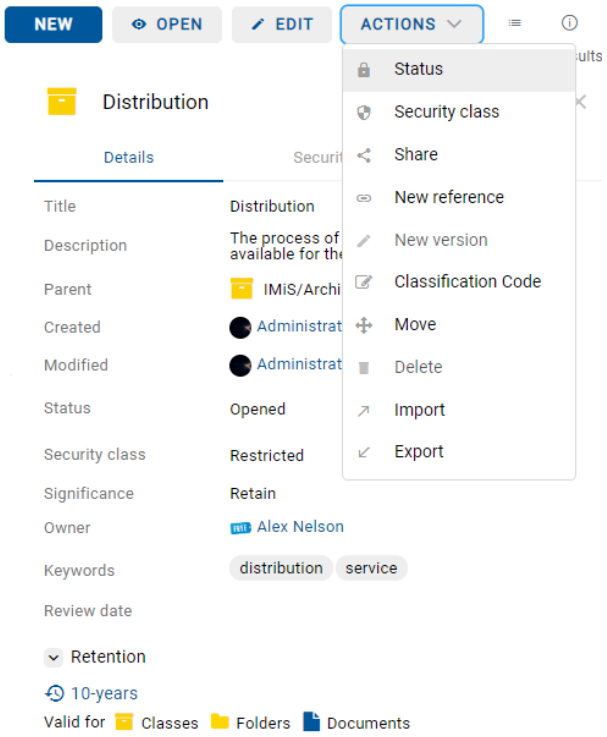

Image 136: The popup menu for selecting the Status command

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

For more information on the set of predefined values for the entity's status see chapter Entering the status of an entity.

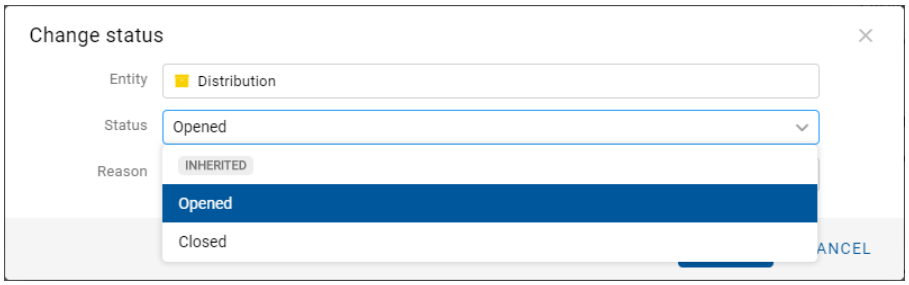

Image 137: Selecting the status

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

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

Image 138: Selecting the status and giving the reason for the change

4.3.3.8 Changing the security class

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

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

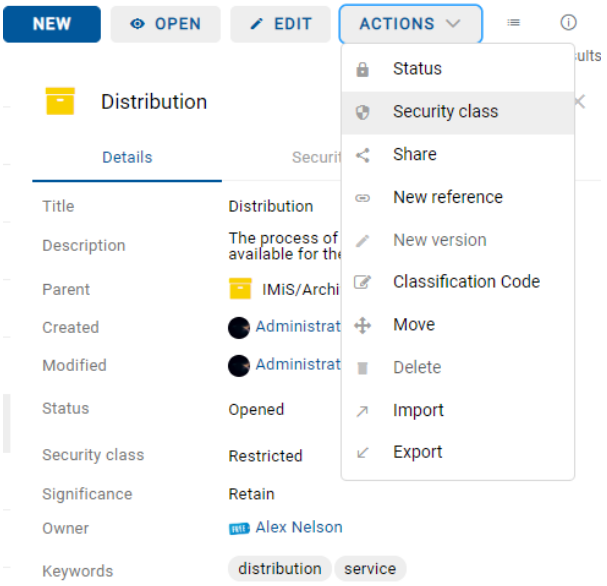

Image 139: The popup menu for selecting the Security class command

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.

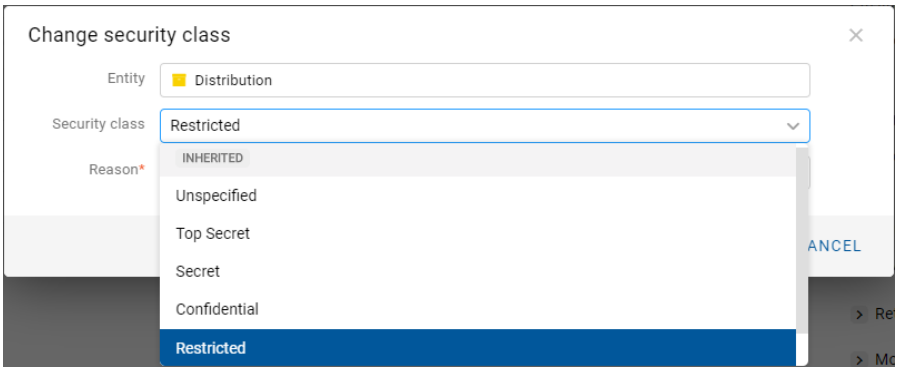

Image 140: Selecting the security class

The user enters the reason for the change of security class into the Reason to change field.

The change is confirmed by clicking the Save button.

Image 141: Selecting the security class and giving the reason for the change

4.3.3.9 Sharing an entity

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

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

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

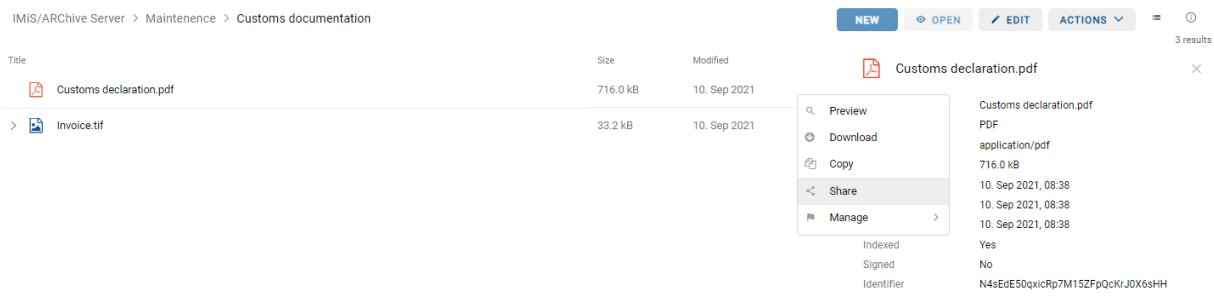

Image 142: Selecting the command Share in the popup menu

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

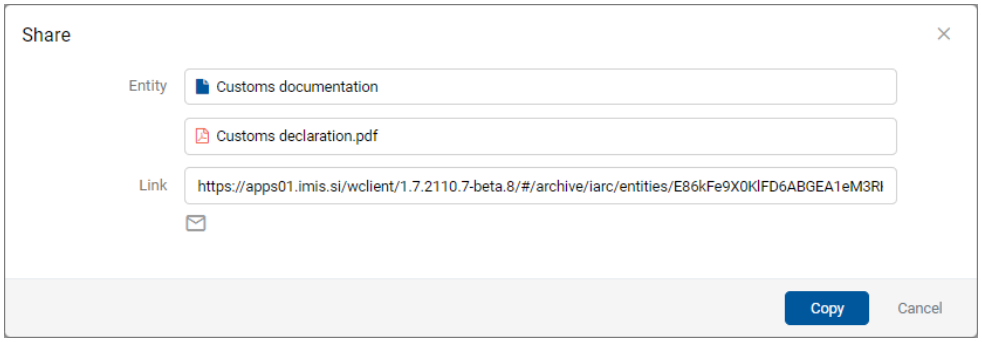

Image 143: Displaying the created link to the selected entity

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

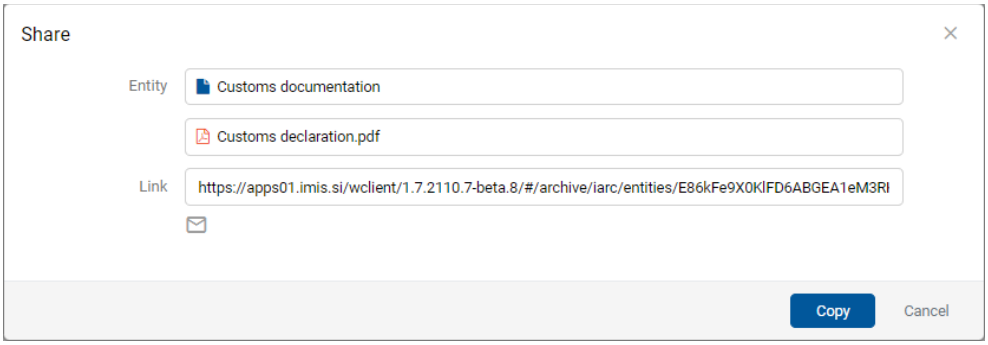

Image 144: Copying the link to the selected entity

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

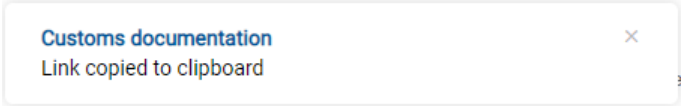

Image 145: Notification of copying a link to the clipboard

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

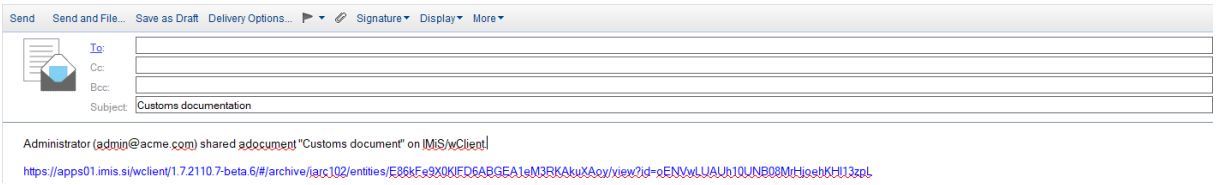

Image 146: Sending a link to the selected entity/content by email

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

4.3.3.10 Adding and editing references

References enable a user to establish connections between entities and instantly move to other entities in the classification scheme.
To add references on an entity the user must have the Create reference permission.
The user can add a reference on existing entities by selecting the Actions command in the command bar and New reference in the popup menu.

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

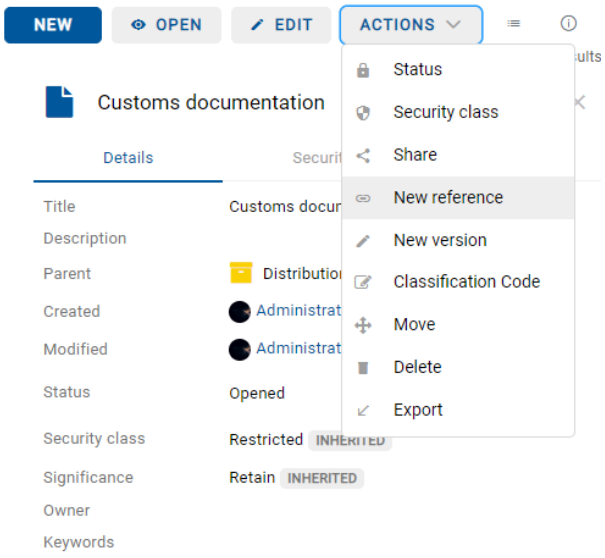

Image 147: The popup menu for selecting the New reference command

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

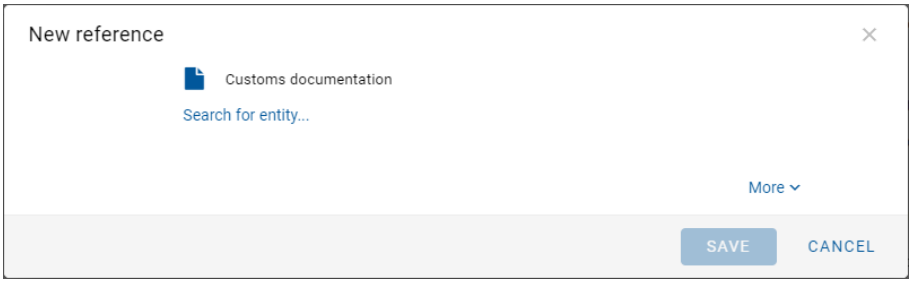

Image 148: The dialog box for adding and editing a reference

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.

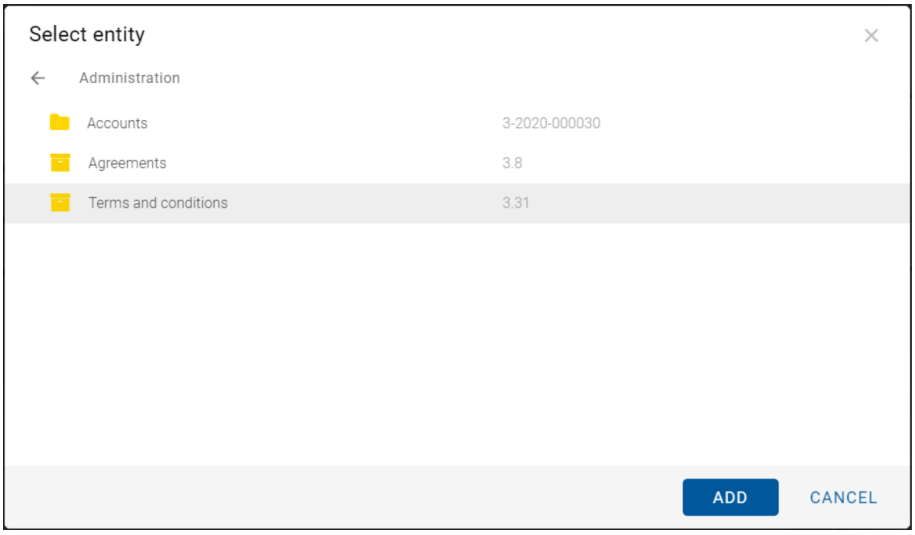

Image 149: Selecting Search for entity« in the New reference dialog box

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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.

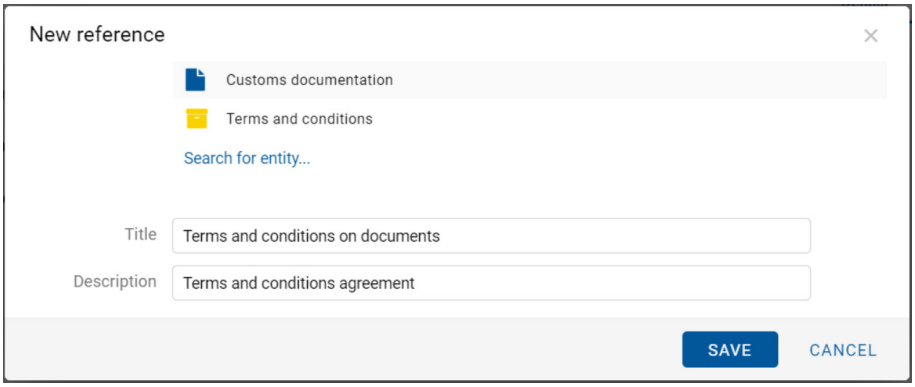

Image 150: Adding the Title and Description in the New reference dialog box

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

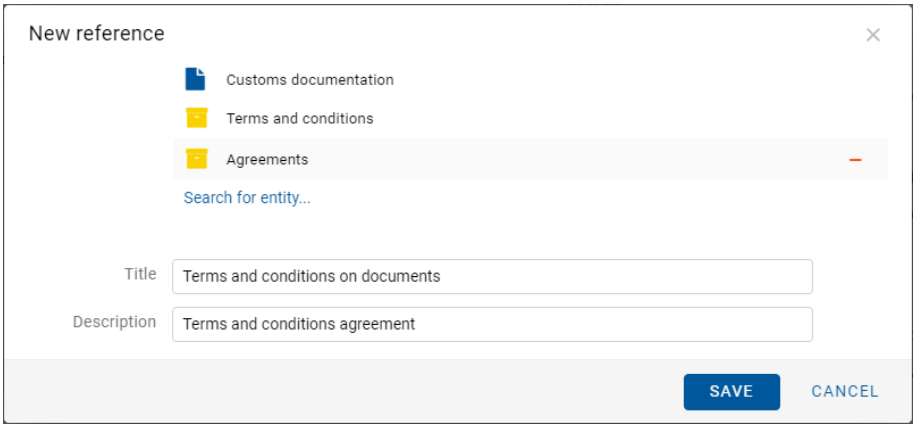

Image 151: Removing a reference before saving

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

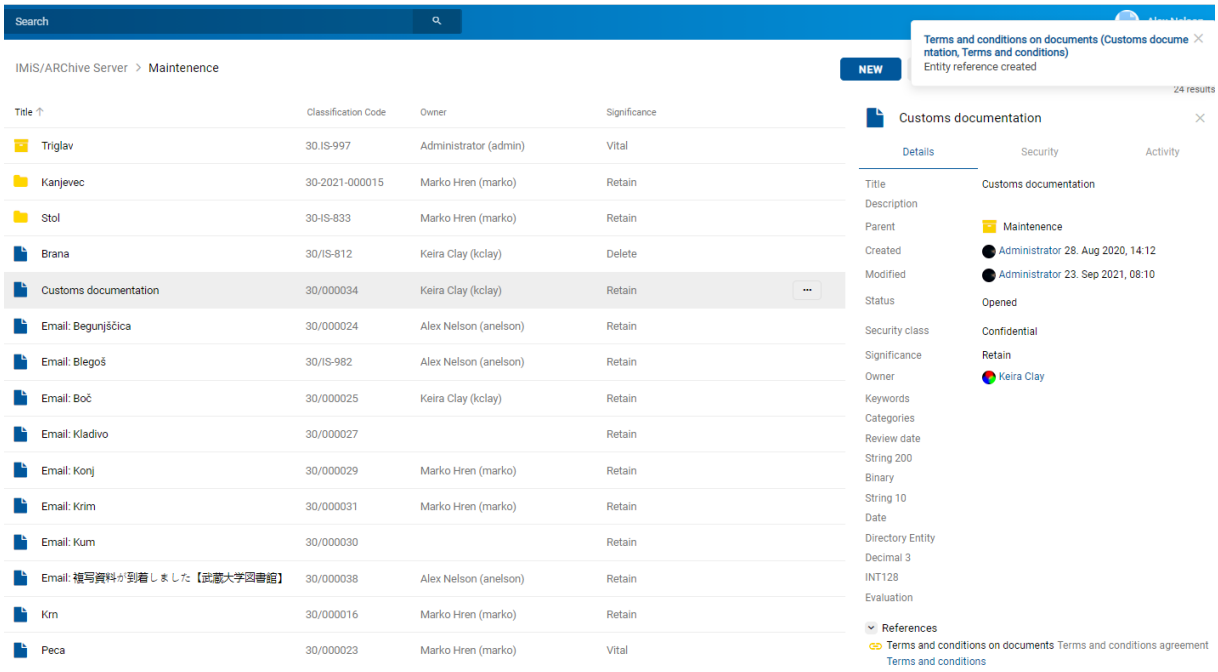

Image 152: Notification about an added, modified or deleted reference

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

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

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

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

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

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

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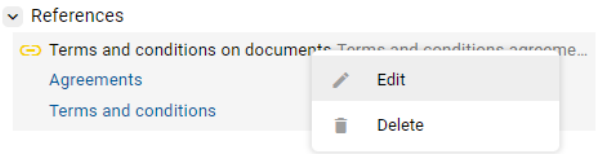

Image 153: A dialog box for selecting an action on the reference

4.3.4 Entity move

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

To move entities, a user requires the following permissions:

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

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

- Actions command in the command bar.
- popup menu on the entity chosen from the list of contained entities.

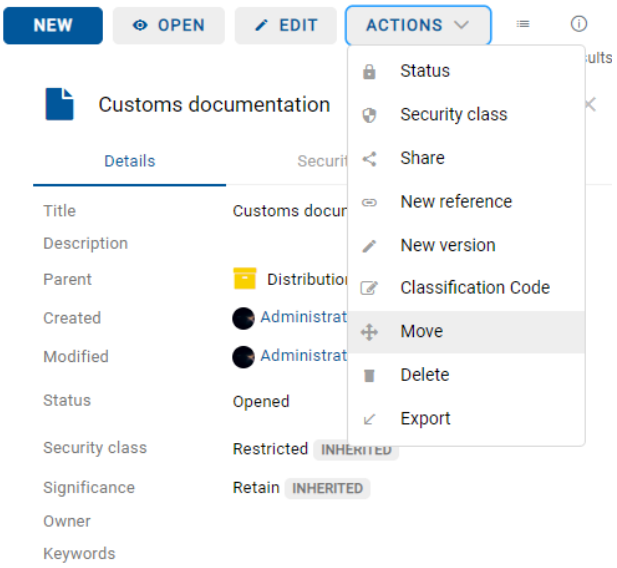

Image 154: Selecting the Move command via the Actions command in the command bar

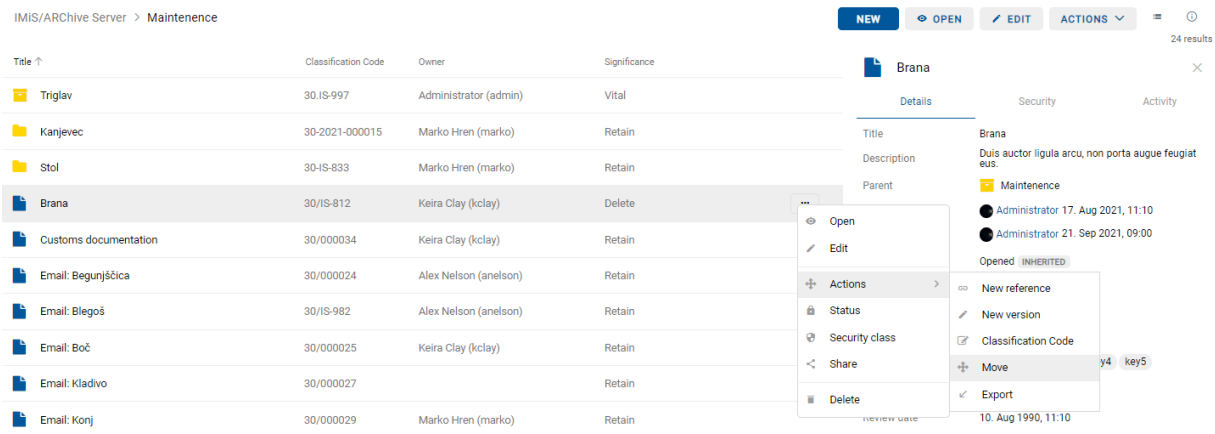

Image 155: A popup menu on the selected entity for selecting the Move command

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.

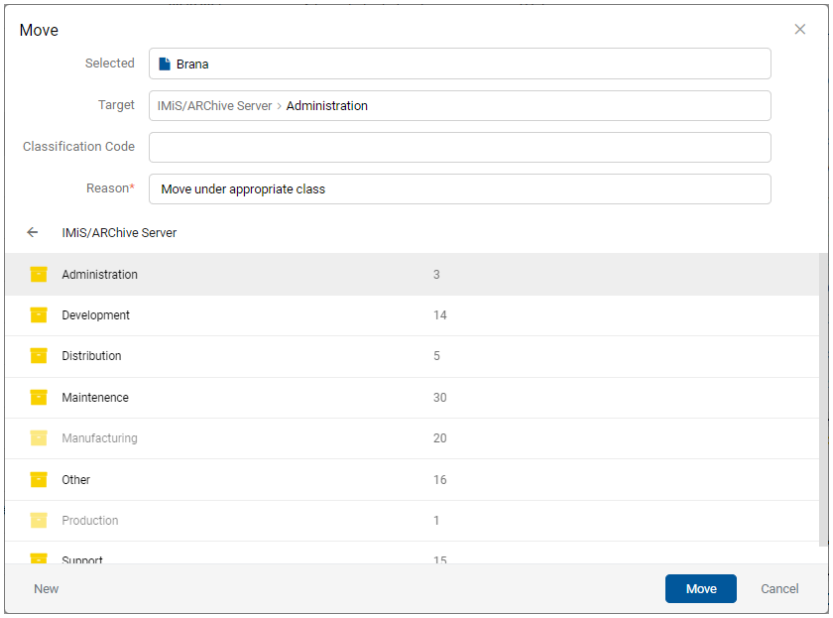

Image 156: A dialog box for moving an individual entity

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.

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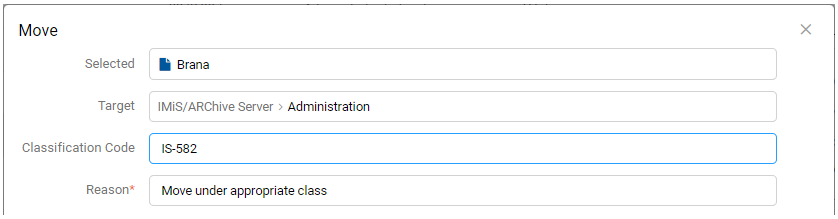

Image 157: Manually assigning the classification code when moving

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.

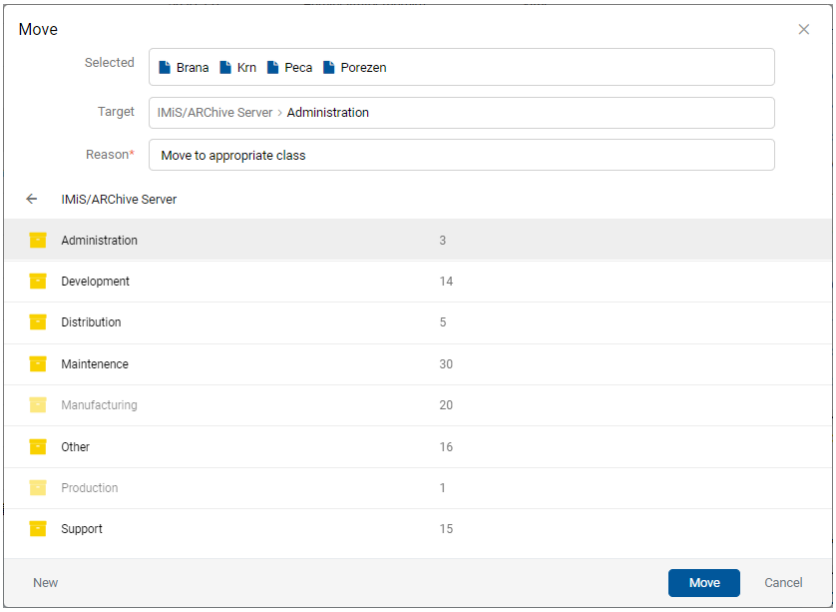

Image 158: A dialog box for moving multiple entities

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.

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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.

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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).*

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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 159: 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.

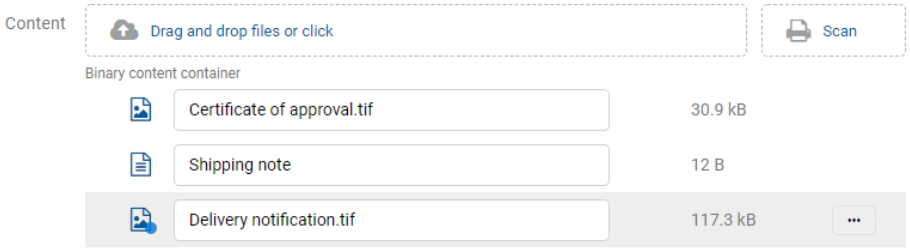

Image 160: The added content before saving

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 161: The added content after saving

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

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

Note:

Attaching contents is possible only in the Document entity type.

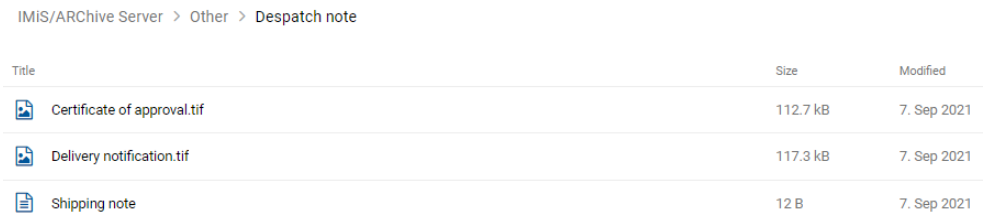

Image 162: Displaying the list of contents in open mode

4.3.5.1.2 Capturing content from a scanner

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

Image 163: Displaying the icon Scan for capturing content from a scanner

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

- *of the service key in the "Security" tab of the IMiS®/Capture Service..*
  For more information see chapter Security settings in IMiS®/wScan Manual.
- *of the service and security key address in the IMiS®/wScan section in the "Settings" tab.*
  For more information see chapter The Details tab.

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

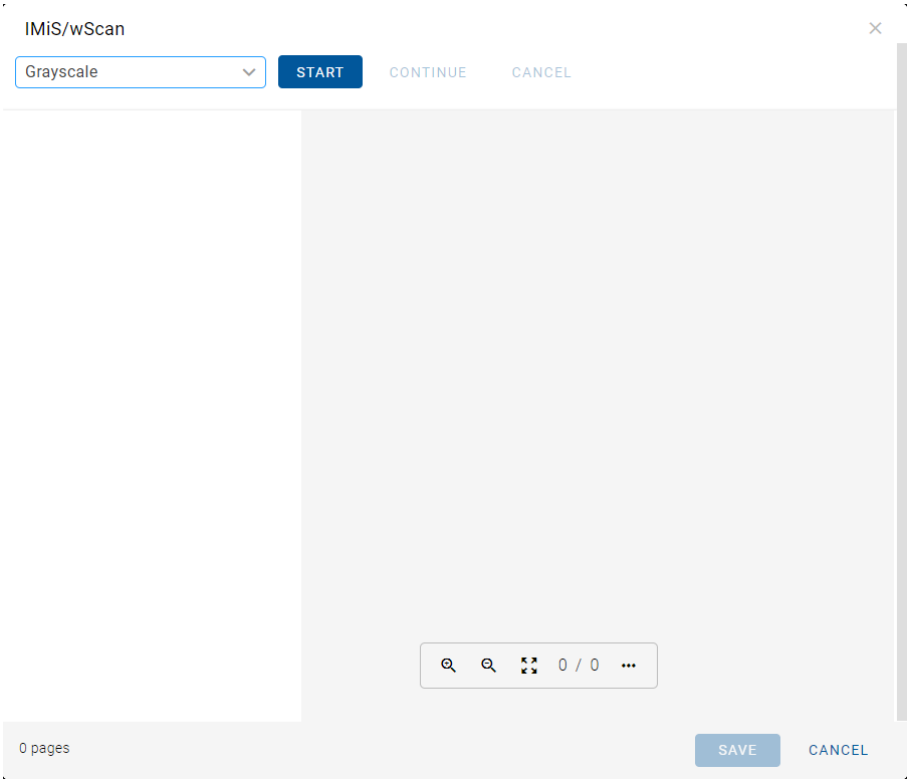

Image 164: Integrated window for scanning with IMiS®/wScan

Note:

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

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

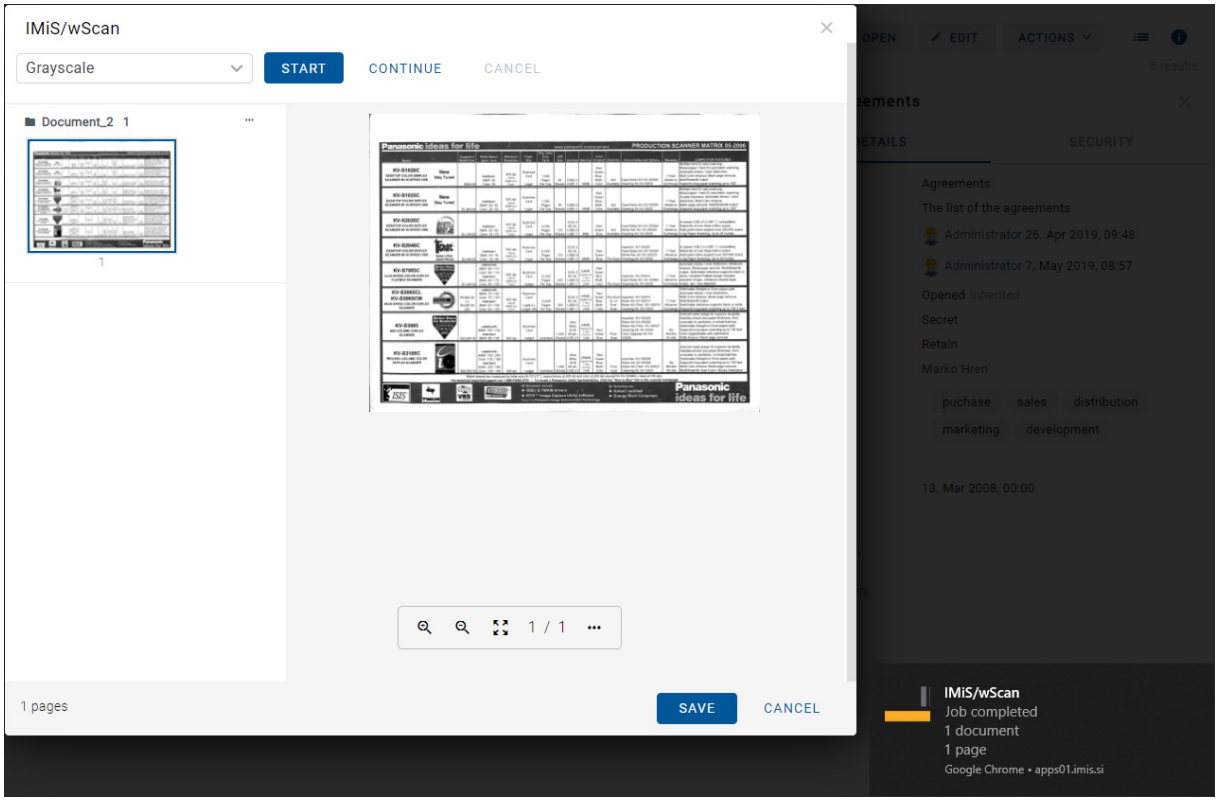

Image 165: Displaying the document after finishing the scan

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

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

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

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

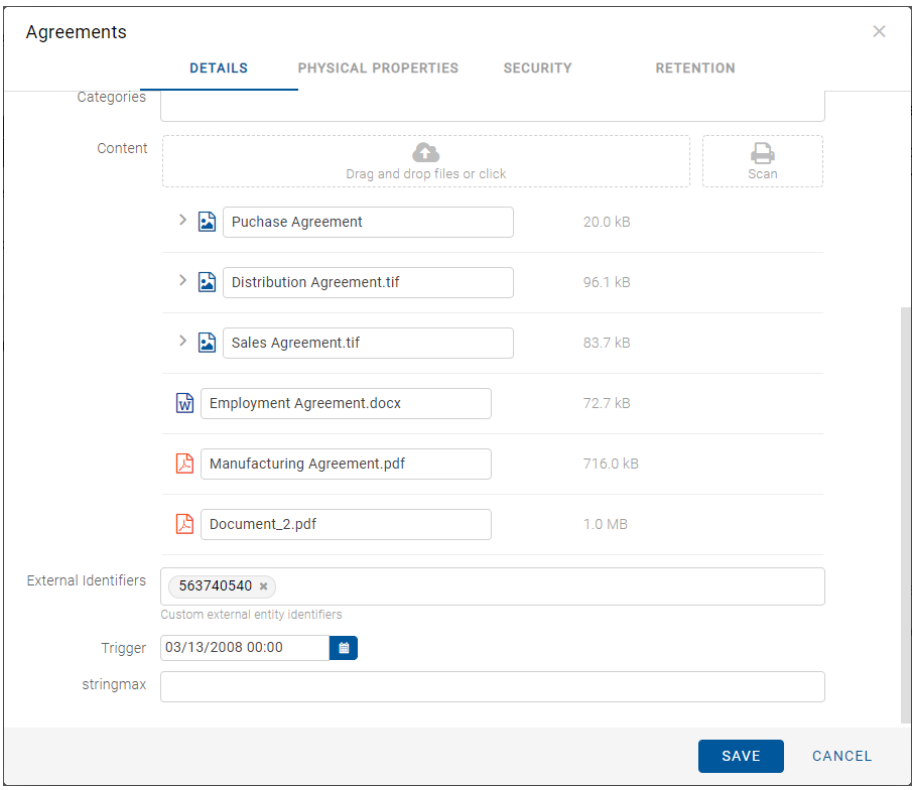

Image 166: A scanned document added to the list

For more information on setting IMiS®/Capture Service see chapter Application integration in the IMiS®/wScan Manual.

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

Troubleshooting: Most frequent issues when capturing content:

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

4.3.5.2 Content details

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

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

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

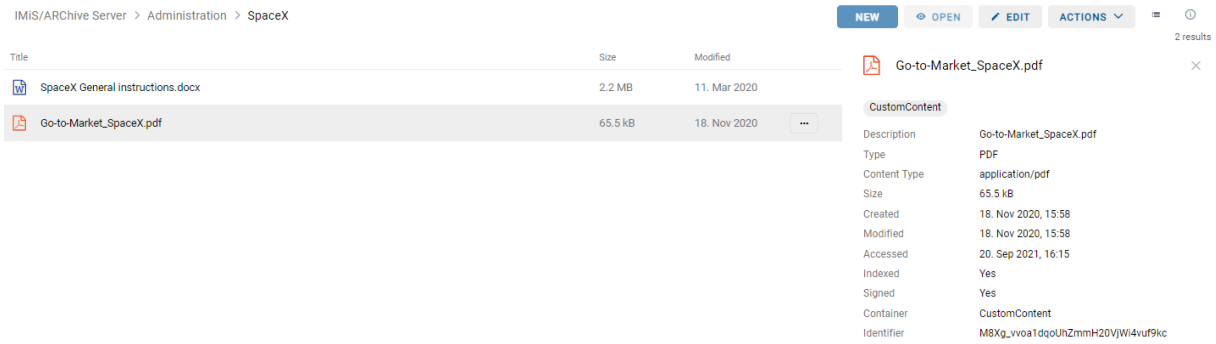

Image 167: Content details in the right view

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

Image 168: Changing the description of content in editing mode

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

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

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

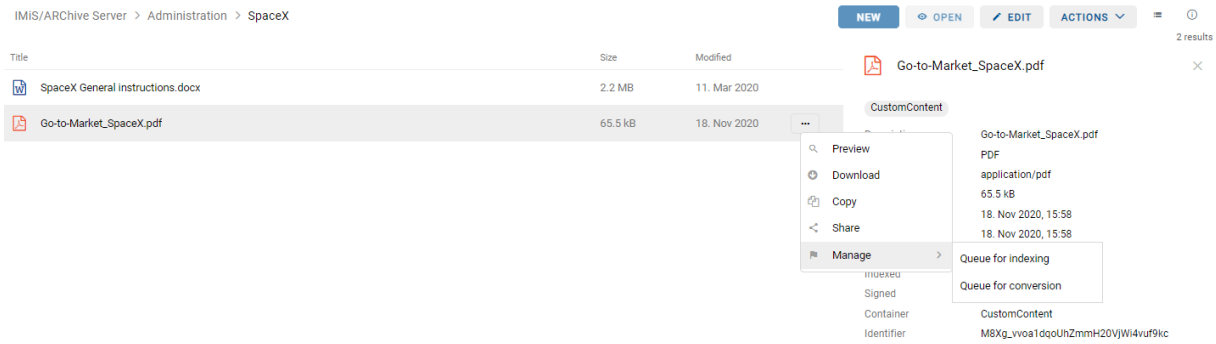

Image 169: Popup menu on the selected content in the reading mode

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).

Image 170: 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.

Image 171: 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.

Image 172: 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.

Image 173: 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.

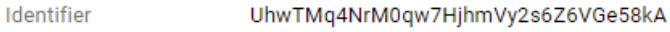

Image 174: An example of the document content identifier

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

Image 175: An example of a display of indexed document content

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

Image 176: An example of a display of signed document content

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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).

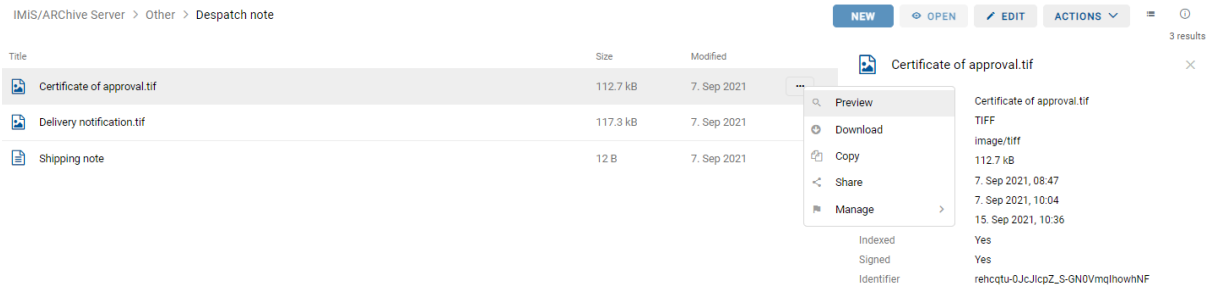

Image 177: Opening document content

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

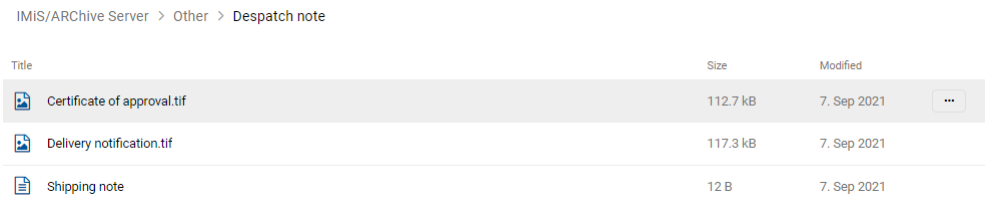

Image 178: Opening content by clicking on the content

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.

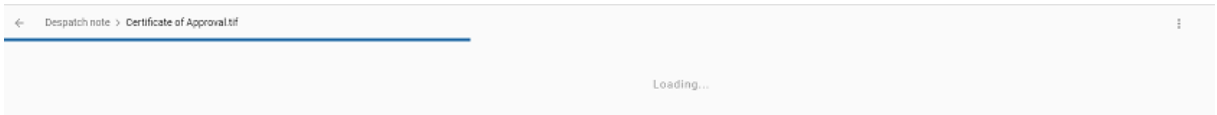

Image 179: Loading content

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.

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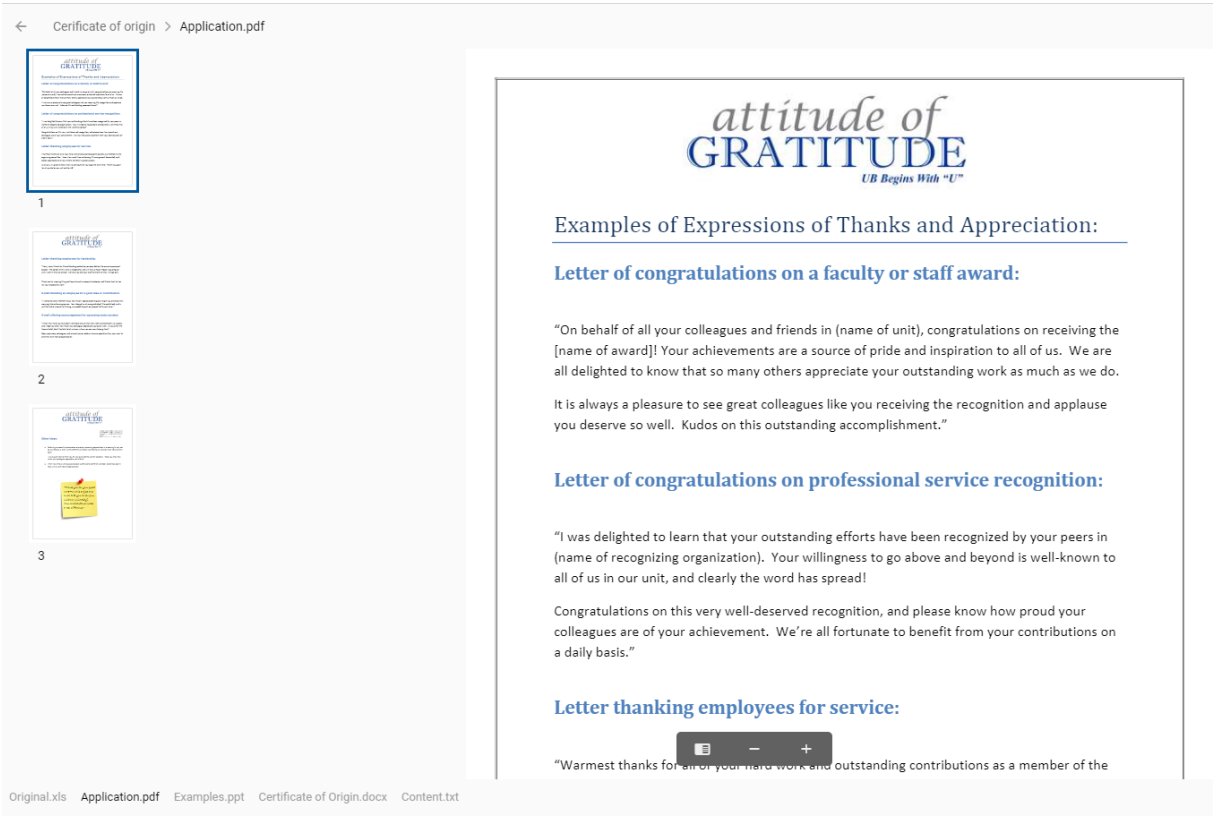

Image 180: Displaying the menu for selecting and previewing content

For easier and faster searching by the pages of the contents of PDF/A and TIFF formats, the user can use the side menu with the thumbnails of document pages.
Located on the displayed content pages is a menu for zooming in or out of the displayed content and the side menu view.

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

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

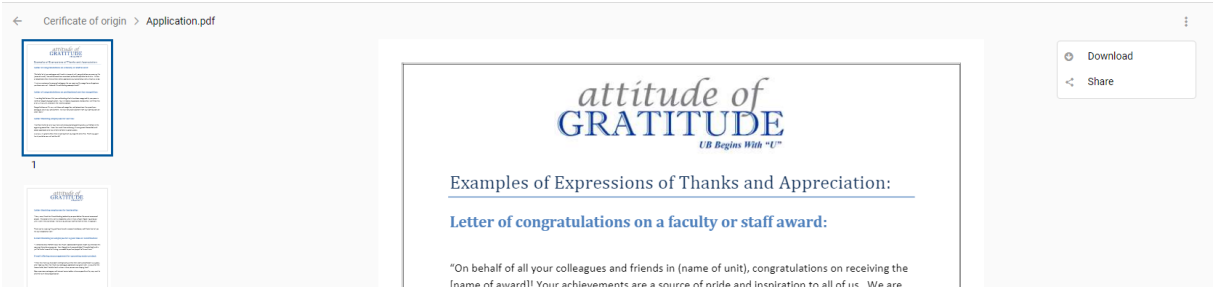

Image 181: Selecting the menu on the content preview

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

Example 1: *Link with the parameter id*
https://apps01.imis.si/wclient/1.5.2010.5/#/archive/iarc101-x64/entities/BMtozc348swzj1NCSyWXEaUH44UD65j4/view?id=Qgi2oGjJOdcwztm0BE7slvULSbamjykh&ver=4/OBJECTS

Example 2: *Link with the parameter index 1*
https://apps01.imis.si/wclient/1.5.2010.5/#/archive/iarc101-x64/entities/BMtozc348swzj1NCSyWXEaUH44UD65j4/view?id=Qgi2oGjJOdcwztm0BE7slvULSbamjykh&ver=4/OBJECTS/VIEW?INDEX=1

Example 3: *Link without parameters, which opens the first object*
https://apps01.imis.si/wclient/1.5.2010.5/#/archive/iarc101-x64/entities/BMtozc348swzj1NCSyWXEaUH44UD65j4/view?id=Qgi2oGjJOdcwztm0BE7slvULSbamjykh&ver=4/VIEW

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

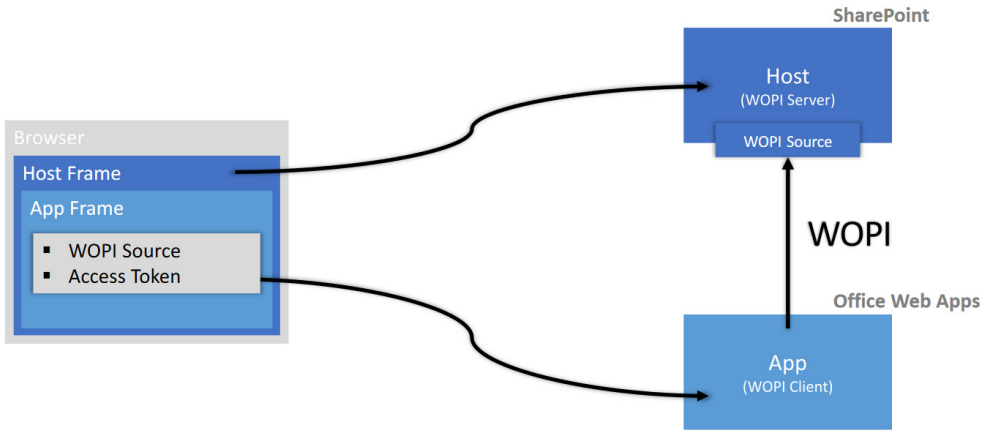

Image 182: WOPI flow chart

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

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Image 183: Opening MS Office content

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

- Audio (wav, ogg, mpeg)

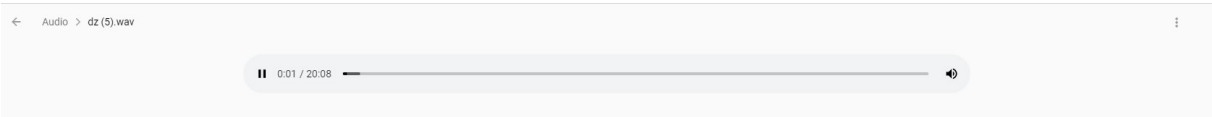

Image 184: Opening audio content

- Video (mp4, webm, ogg)

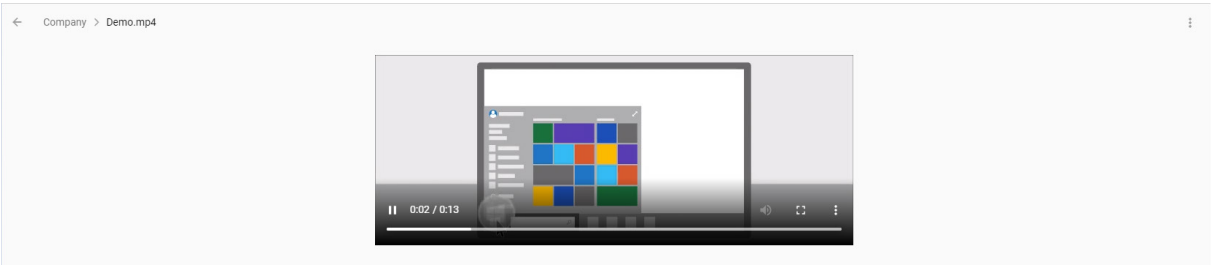

Image 185: Opening video content

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

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4.3.5.5 Content printing

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

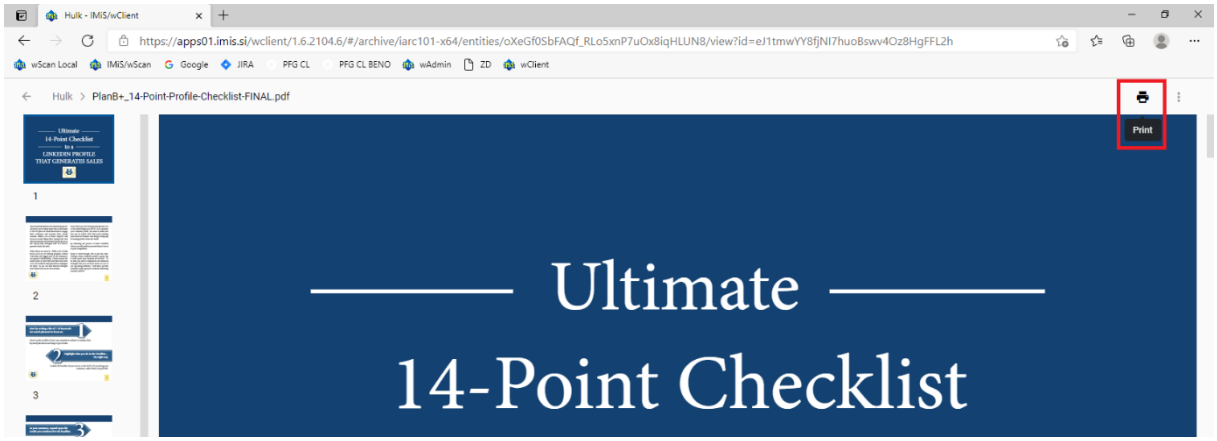

Image 186: Selecting the content printing icon

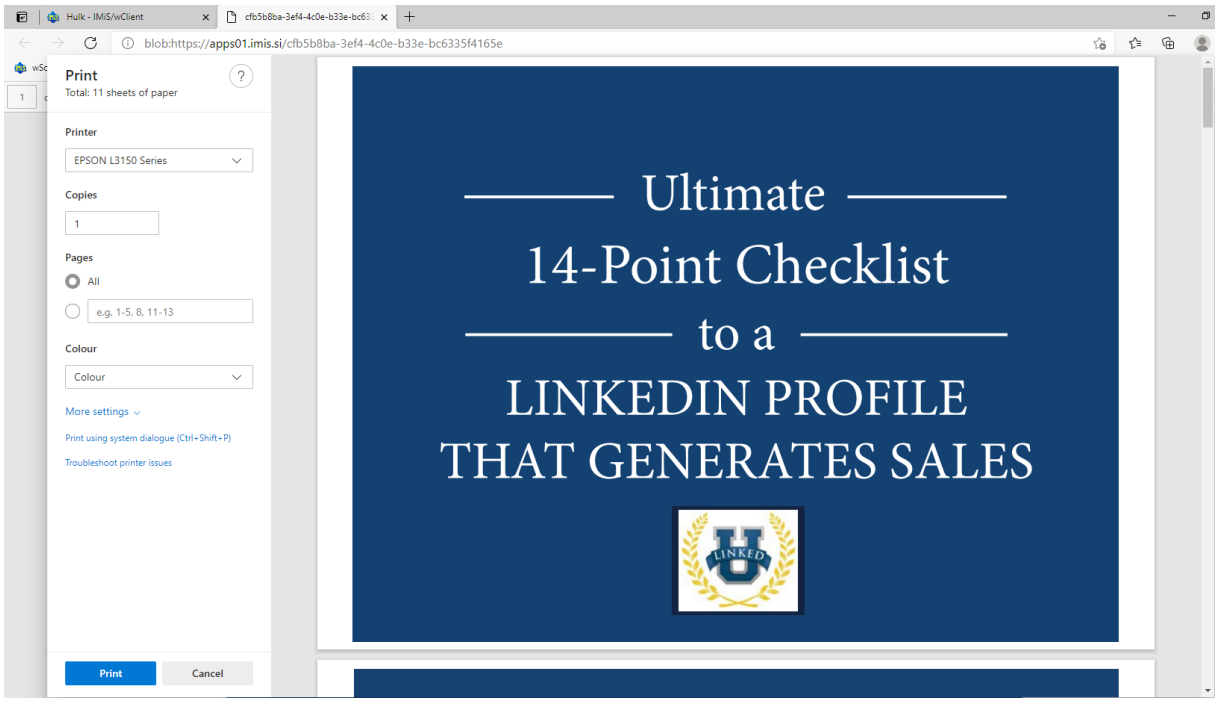

Image 187: Content printing preview and settings

4.3.5.6 Downloading content

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

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

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

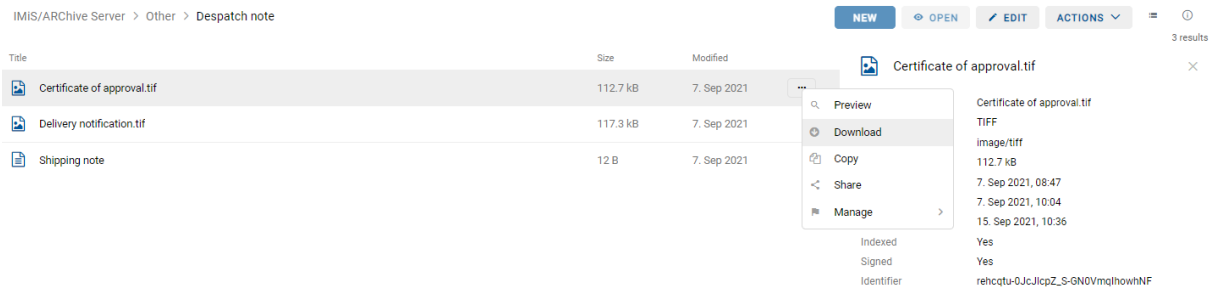

Image 188: Selecting the Download command in the popup menu

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

Image 189: 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.

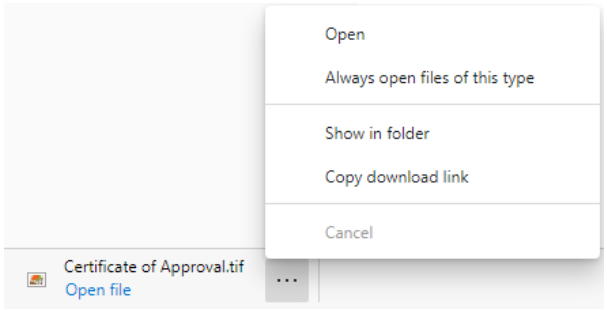

Image 190: Displaying the option of selecting actions on downloaded content

4.3.5.7 Copying content

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

The user makes a copy of the entity's content and copies it to another document-type entity.

The user selects the content in the Open mode. By selecting the popup menu on the tagged content, the user selects the Copy command.

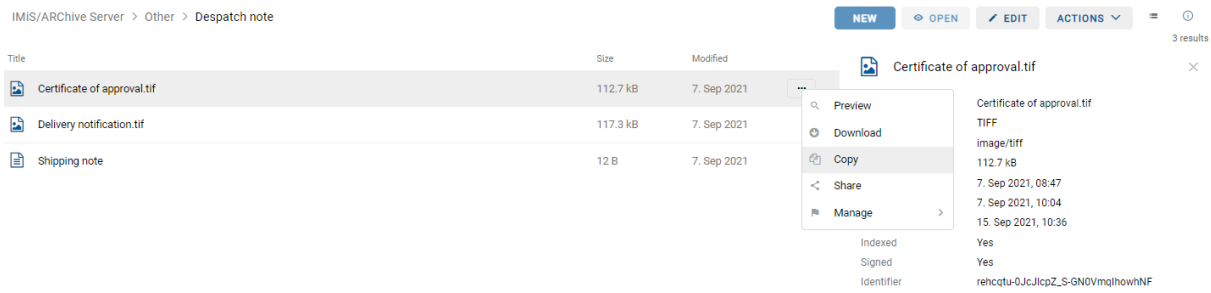

Image 191: Selecting the Copy command in the popup menu

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

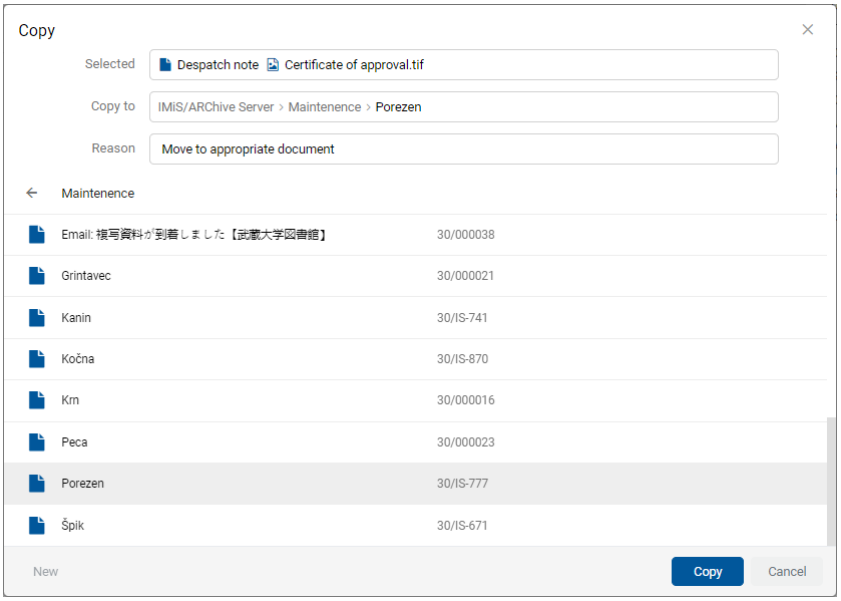

Image 192: Copying the content to another document

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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.

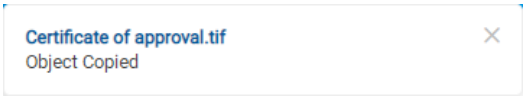

Image 193: Information about saving a copy of the content

4.3.5.8 Sharing content

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

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

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

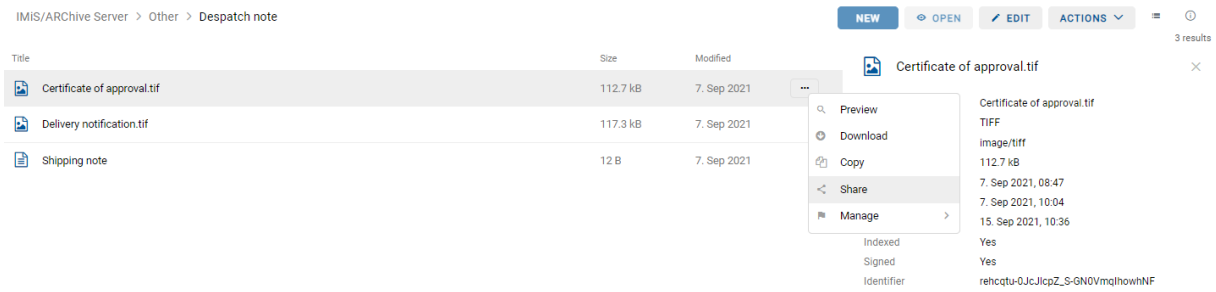

Image 194: Selecting the command Share in the popup menu

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

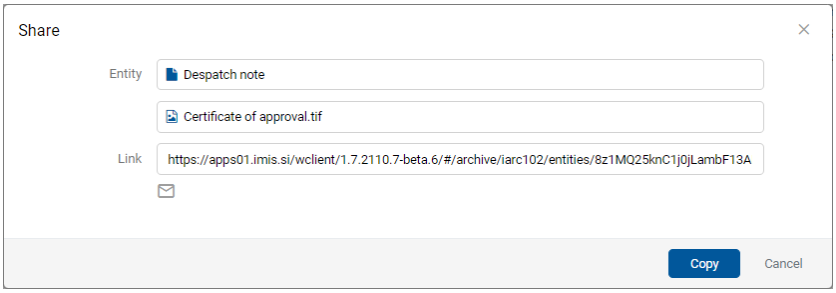

Image 195: Displaying the created link to the selected content

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

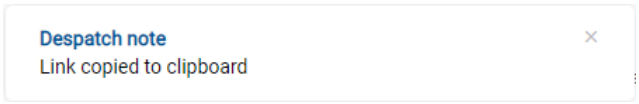

Image 196: Notification of copying a link to the clipboard

4.3.5.9 Content update

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

The user has the option of updating saved content. In editing mode, the user selects the document content. In the popup menu the user selects the Update command.
This opens a dialog box for selecting the content which will replace the existing content.
If the user does not change the title of the content, it is preserved.

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

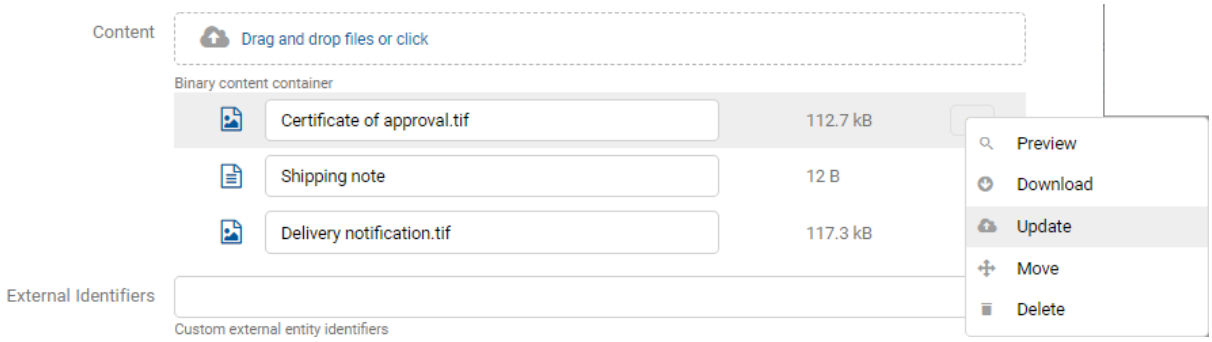

Image 197: Selecting the »Update« command in the popup menu

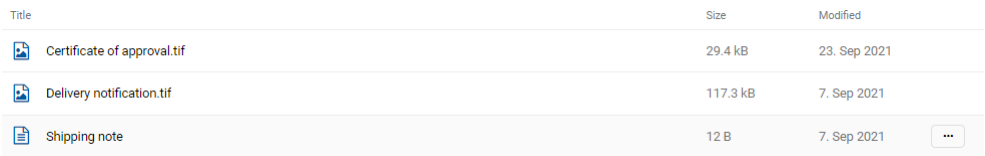

Image 198: The selected content after update

4.3.5.10 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.

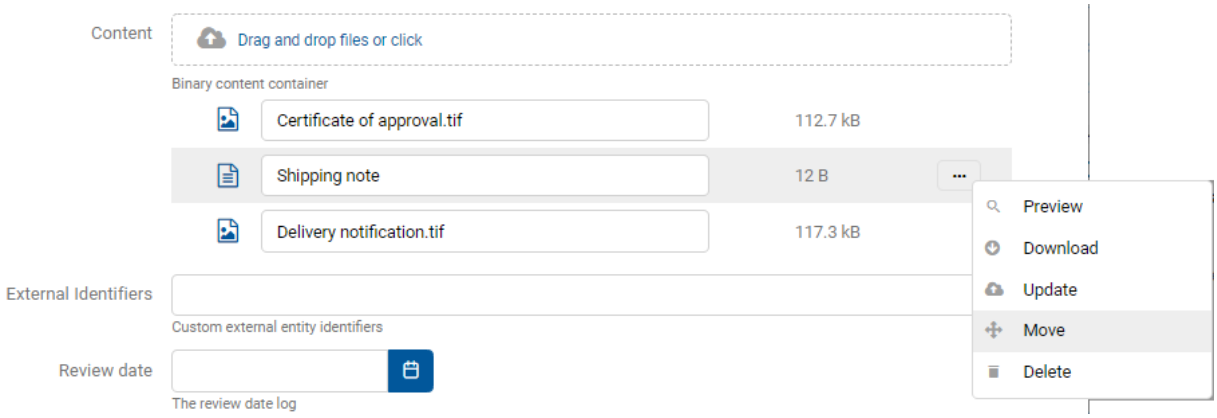

Image 199: Selecting the Move command in the popup menu

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

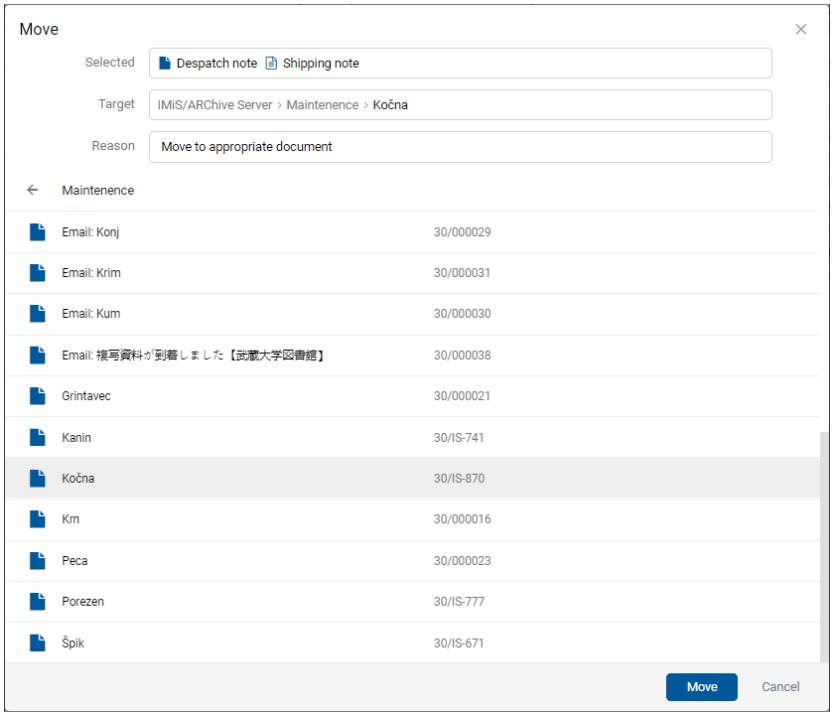

Image 200: Selecting the target document for moving content

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

Image 201: Content temporarily removed from the document

Content move is not performed until after saving changes.

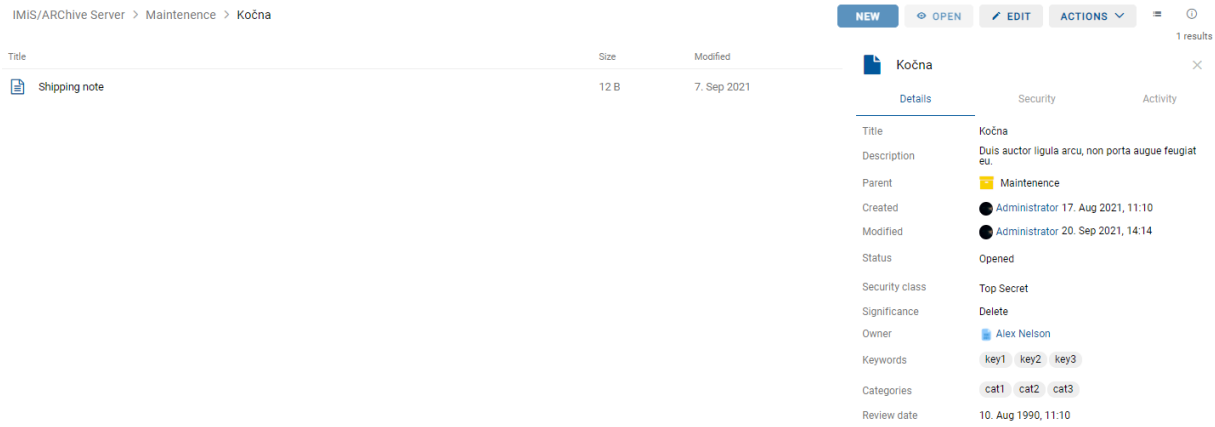

Image 202: Saved document content

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

The user selects accordingly from the set of values.

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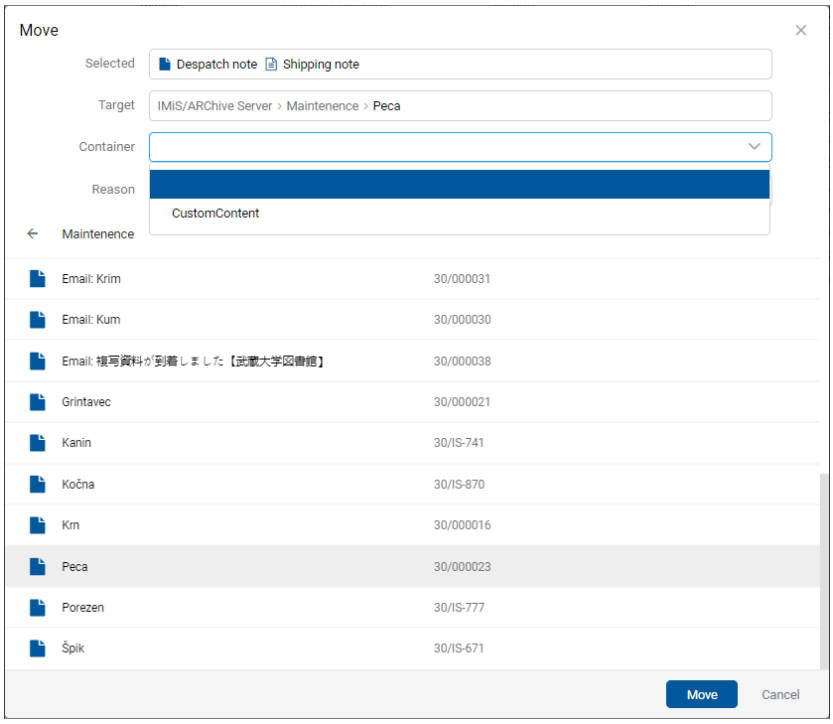

Image 203: Selecting the target document for moving content to the custom content container

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

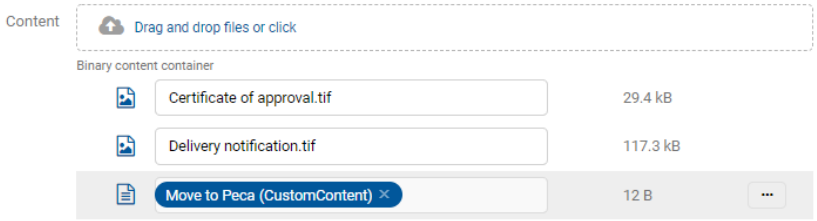

Image 204: Content temporarily removed from the document

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

Image 205: Saved document content to the custom content container

4.3.5.11 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.

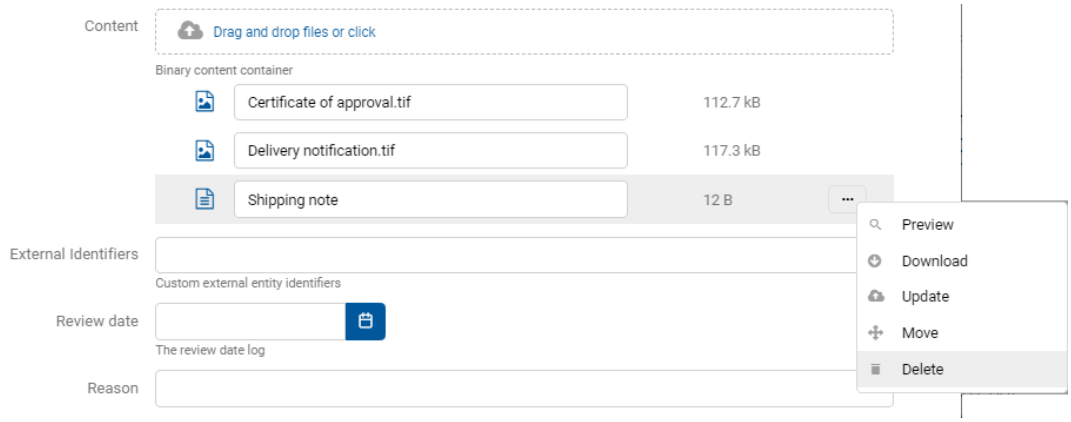

Image 206: The content on the list before deletion

Image 207: The content on the list after deletion

4.3.5.12 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.

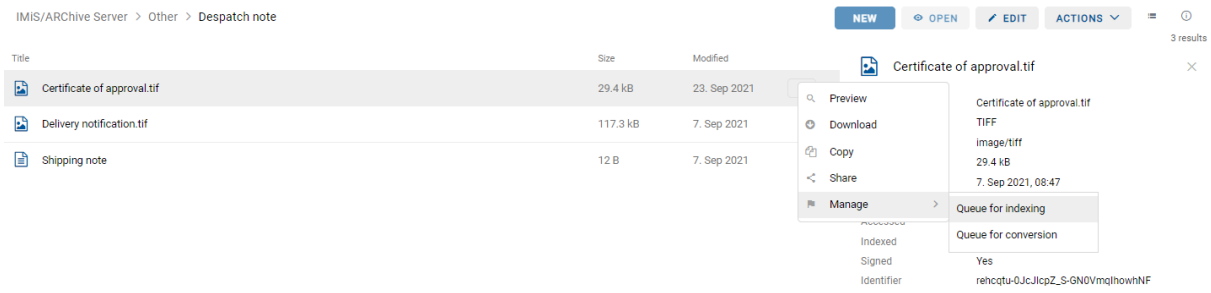

Image 208: Selecting the Queue for Indexing command

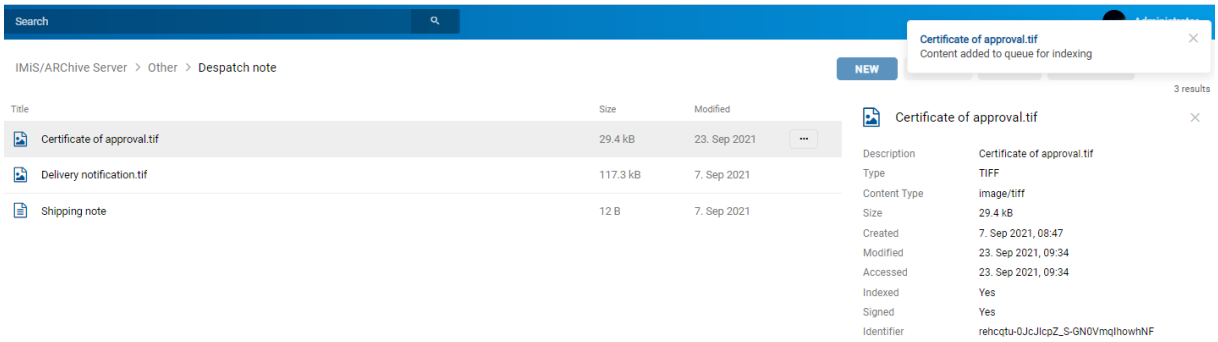

Image 209: Successful adding of content for indexing

4.3.5.13 Content conversion

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

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

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

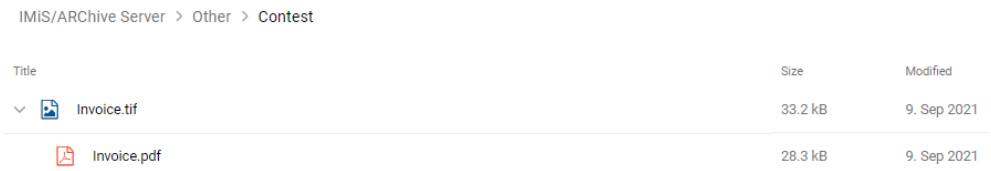

Image 210 Example of automatically converting content on a list

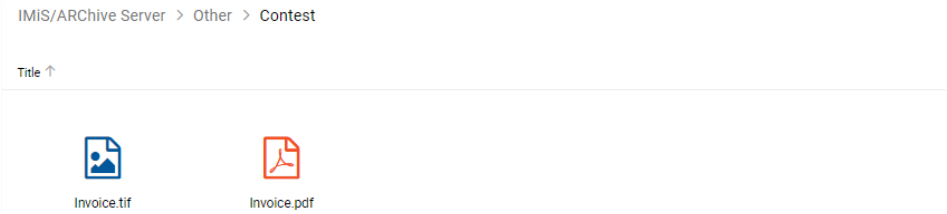

Image 211: Example of automatically converting content in grid view

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

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

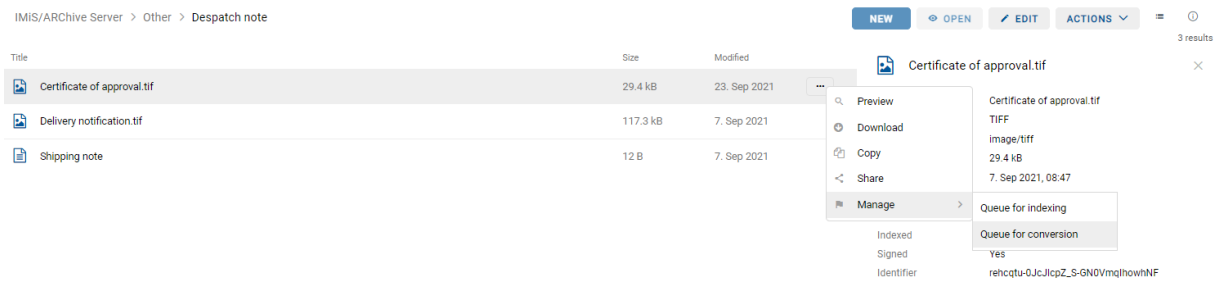

Image 212: Selecting the Queue for Conversion command

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

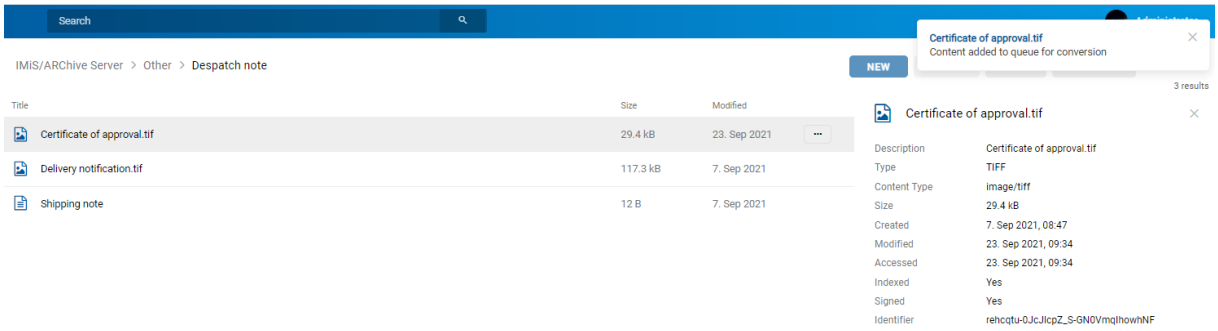

Image 213: Successful tagging of content for later conversion

4.3.5.14 Detaching content

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

The user with the Write permission can perform the detachment.

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

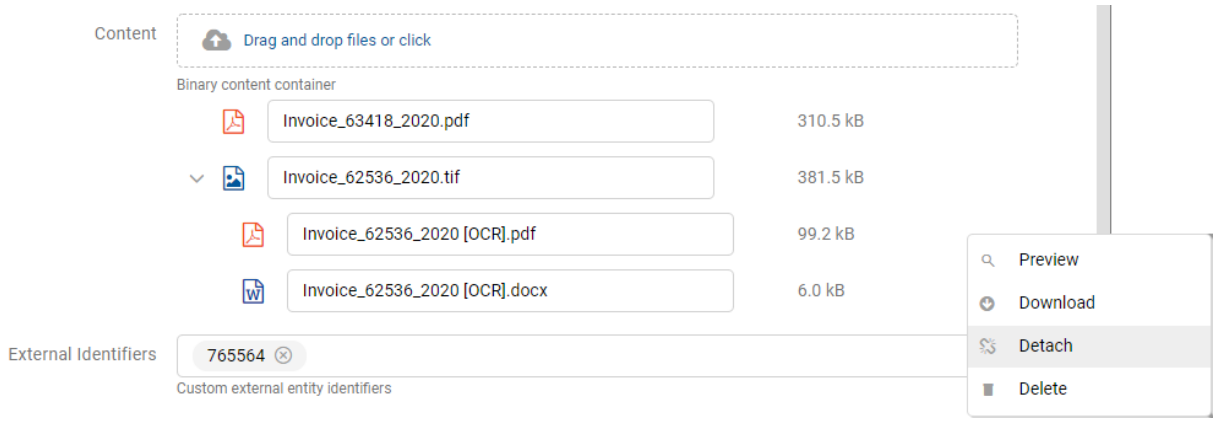

Image 214: Detaching the selected converted content

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

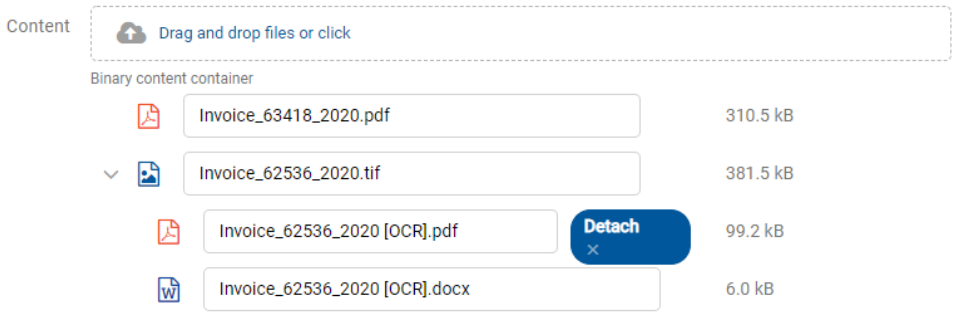

Image 215: Tagging content for detachment

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

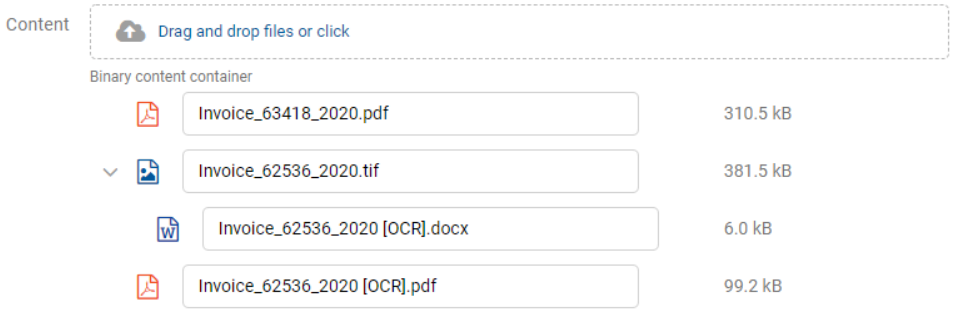

Image 216: Displaying detached content on the list

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

4.3.6 Versioning

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

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

For more information see chapter Versioning in the IMiS®/ARChive Server Manual.

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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.

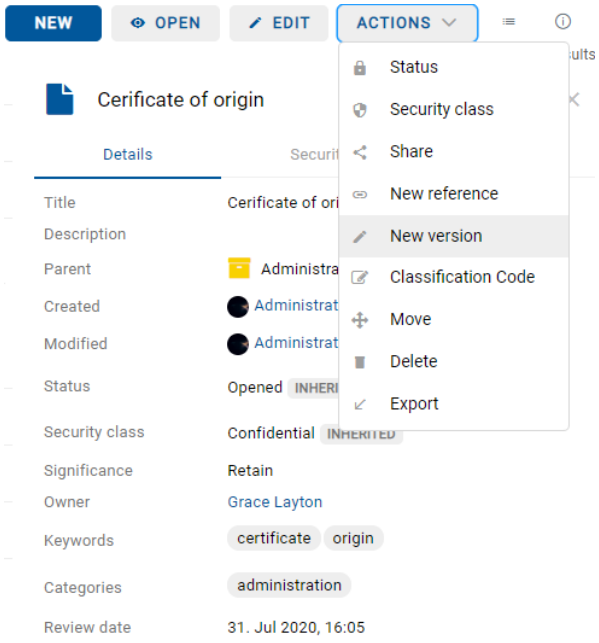

Image 217: Selecting the action New version in the popup menu

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).

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

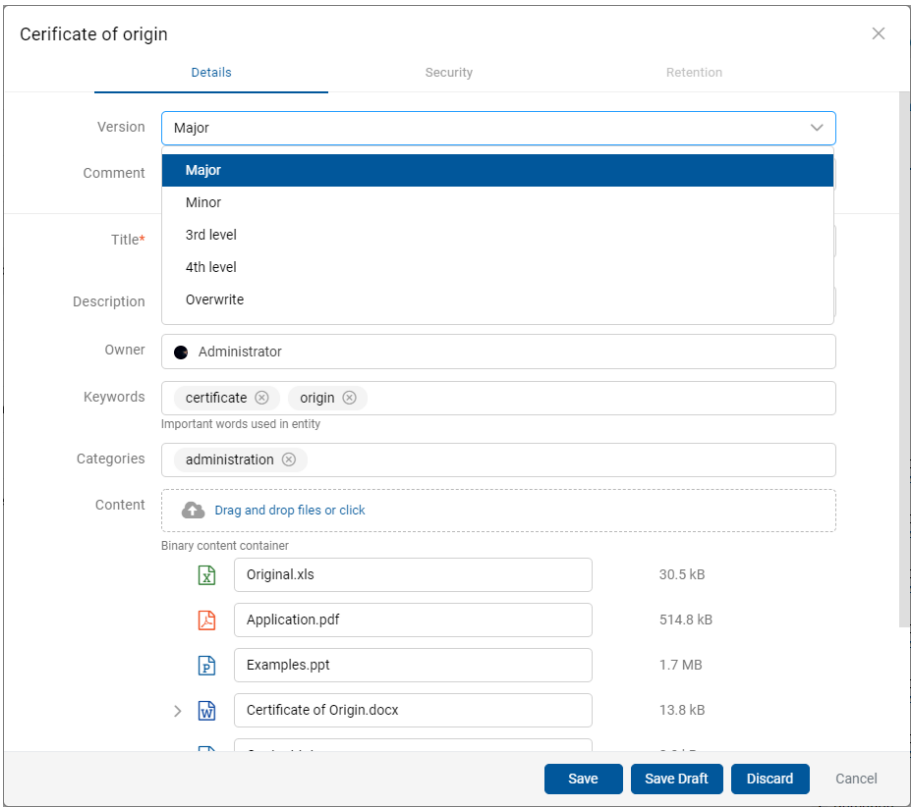

Image 218: Checking out a document version

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

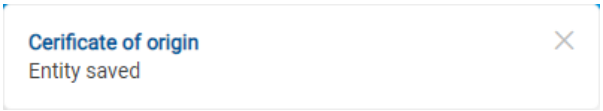

Image 219: Information about saving a document version

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 220: 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.

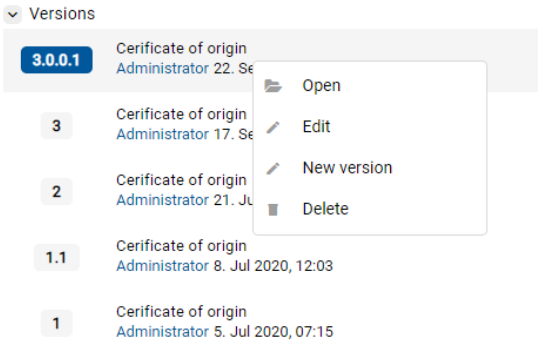

Image 221: A popup menu on the document version

In edit mode the user can change the attribute values.

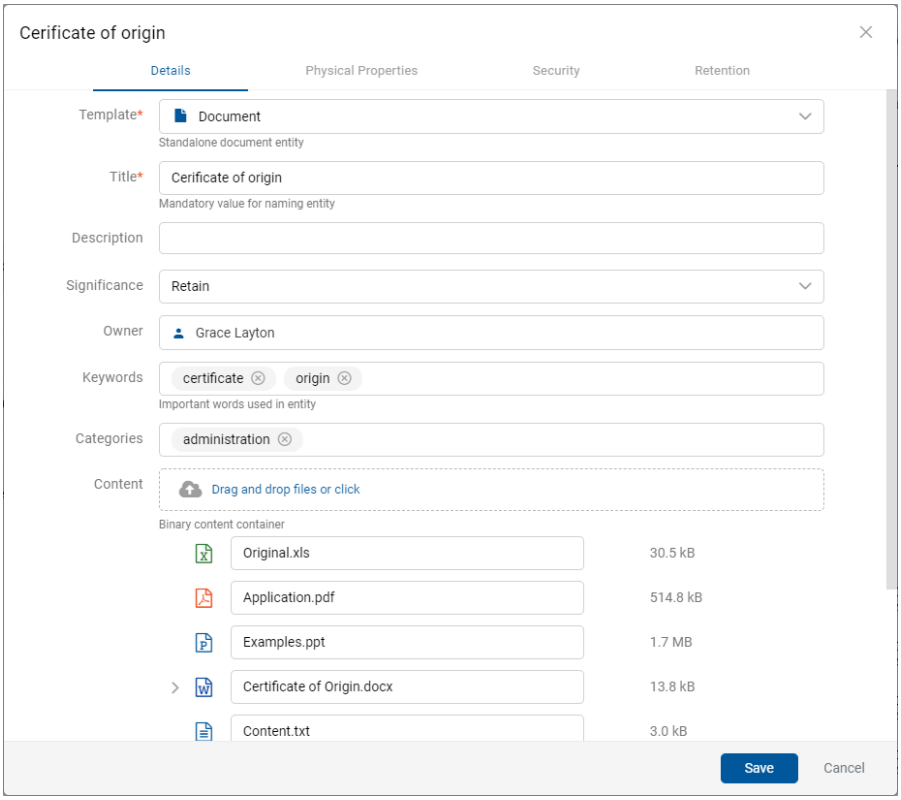

Image 222: Opening a document version in editing mode

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

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

4.3.6.4 Creating draft

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

Note: While preparing and creating a draft, the value of the draft attribute "Owner" changes to the current user. Thus, the document owner differs from the draft owner.
Depending on the settings for access permissions to the attribute of the directory entity type "sys:Owner", it is possible that the document owner will not see the draft in the Drafts folder but will see it on the list of entities.

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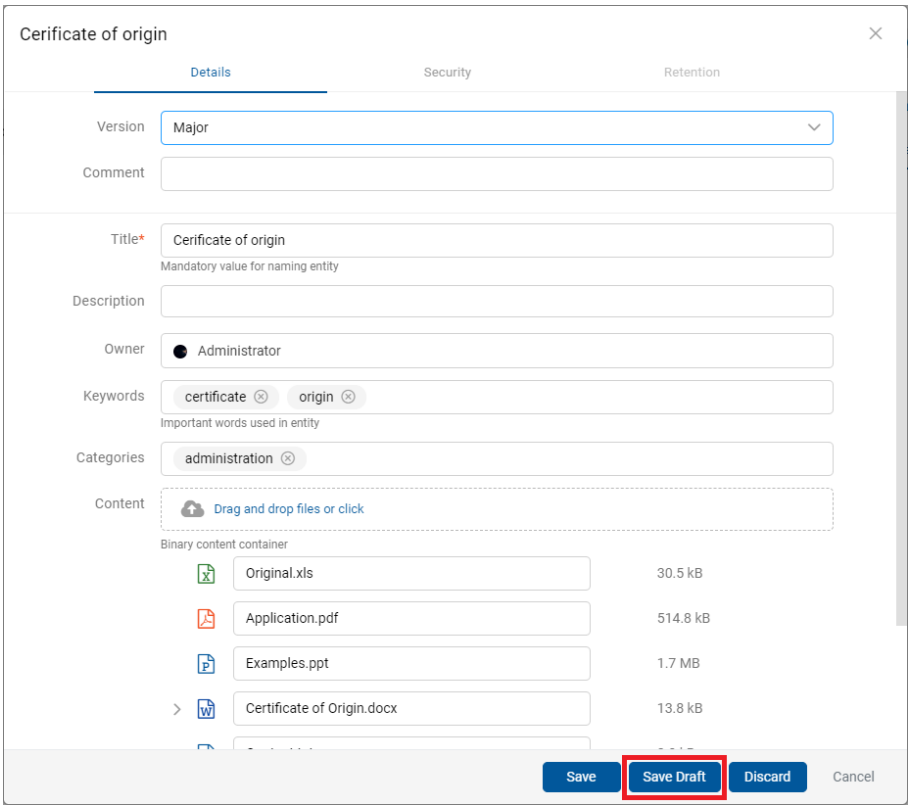

Image 223: Saving a draft for later editing

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.

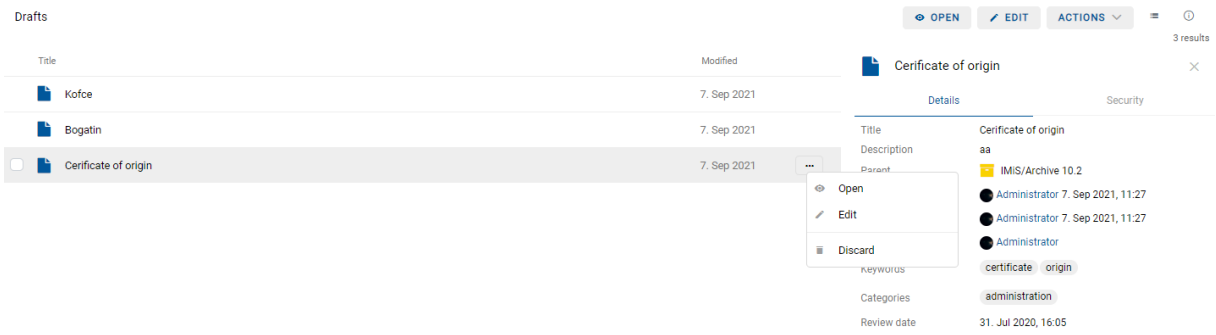

Image 224: A draft of a document version in the Drafts folder

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.

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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.

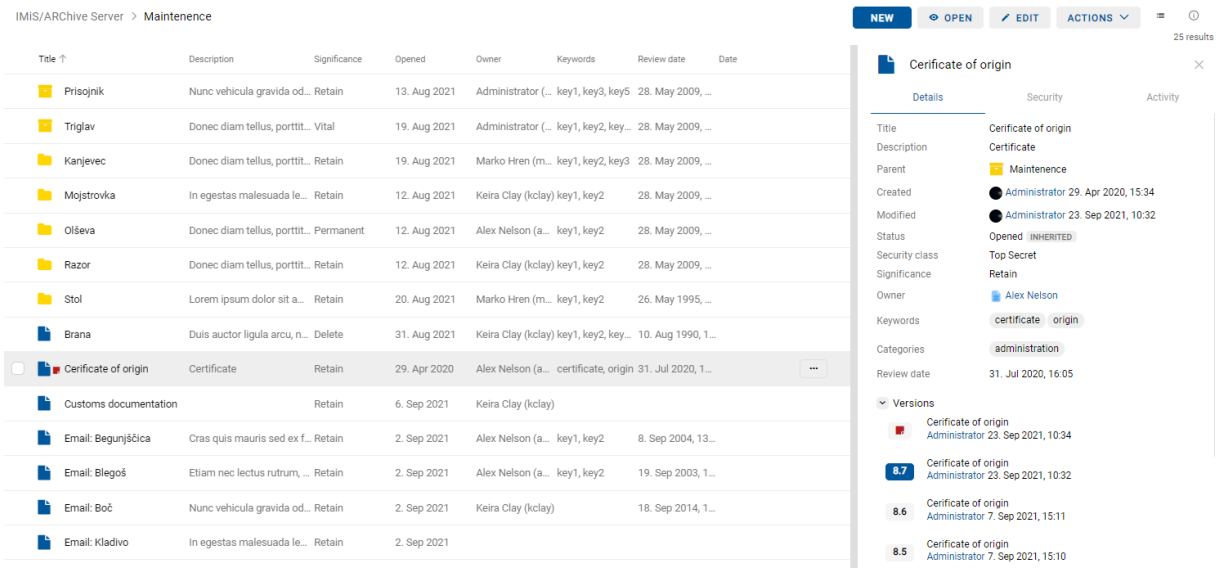

Image 225: Displaying the draft in the list of versions

4.3.6.5 Discarding draft

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

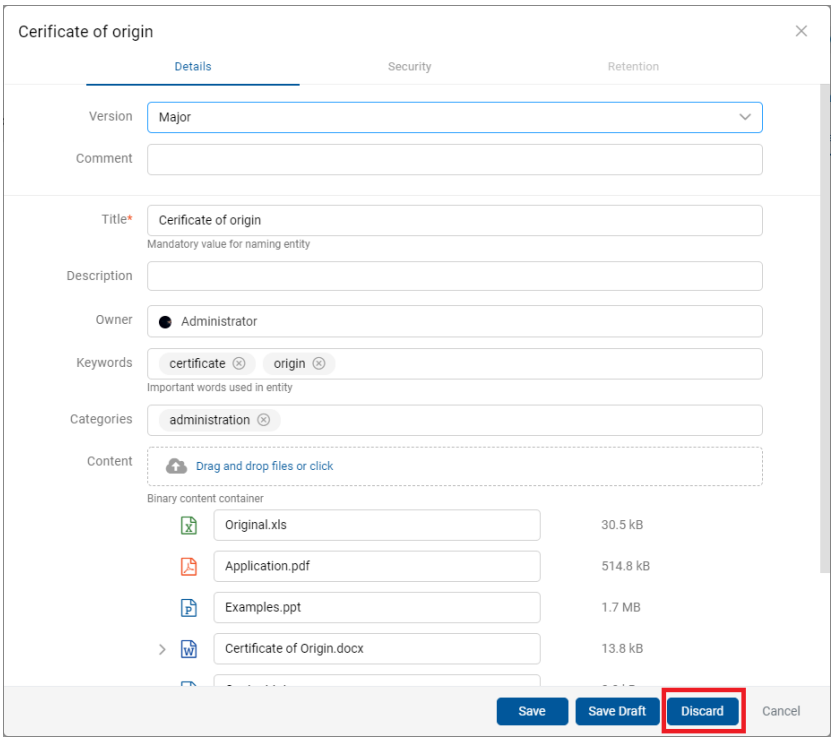

Image 226: Discarding a document draft with the Discard command

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.

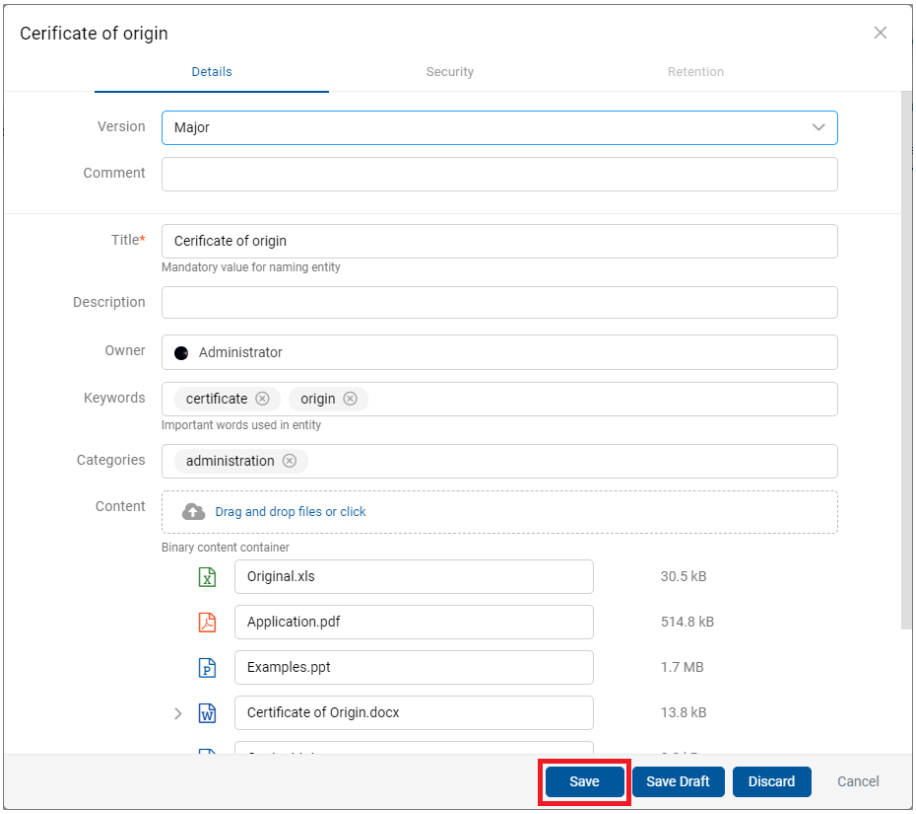

Image 227: Reviewing a draft before checking it in with the Save command

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.

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Users may only search entities they are authorized to access. Search functions are available for the selected entity, or the entire server archive.

The search engine is made up of two sets:

- Recent
- Advanced.

Recent

If the user has previously performed searches, the search history is shown by selecting the search box in the section “Recent”. The list contains only the last 5 searches, while older searches are saved to the user profile (chapter The Search history tab).
The user has the option of deleting the search history with "Remove".

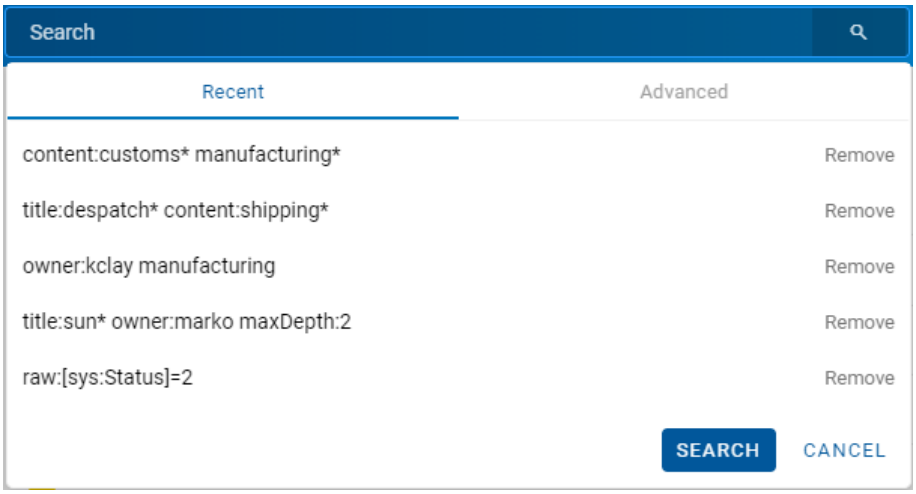

Image 228: Search history

Advanced

The user performs a new search by first selecting the search box. By entering values in the relevant boxes in the section “Advanced” in the dialog box, the user defines the search conditions. The search begins by selecting the action “Search”.

If the user first selects one of the last 5 searches in the section “Recent” and then the section “Advanced”, the search conditions for the selected search appear. These can be modified or supplemented if need be.

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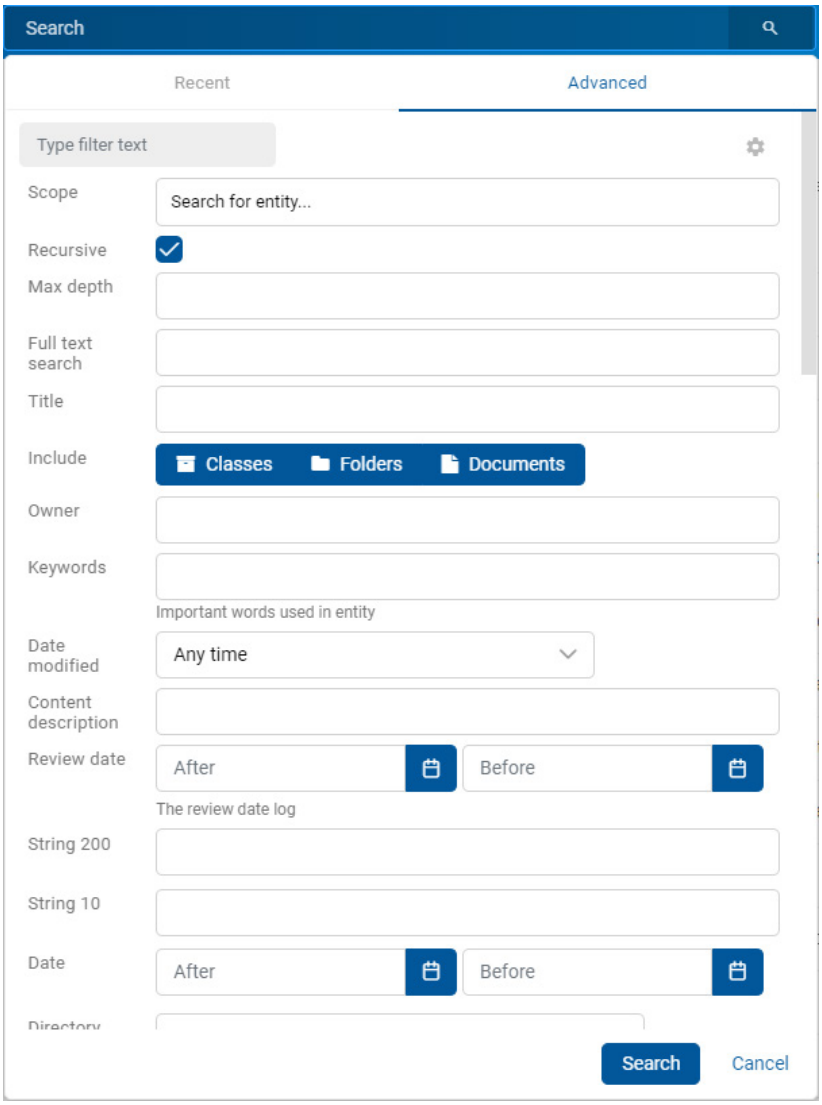

Image 229: Advanced search settings

The default settings for hiding and displaying the order of attributes in the search are defined in the file settings.json, where they can be defined in the elements search.profiles and search.views.

search.profiles	**Description**
id	Profile identifier.
attributes	Collection of attributes.
filter_type	Type of attribute filter. The set of values: - *Include*: certain attributes will be displayed. - *Exclude*: certain attributes will not be displayed.

Table 12: Setting a collection of profiles

search.views	Description
profile	Profile identifier from search.profiles.
archives	Collection of archive identifiers.
members	Collection of directory entities.
editable	Defines whether the search view can be edited. The set of values: - *true*: The user modifies the view which is saved to the user settings. Default value. - *false*: Disables editing the view.

Table 13: Setting the search view

By selecting the icon ⚙, a dialog box opens for setting the attributes for defining the custom search conditions. In the menu, the user is offered both the system attributes and the custom attributes.

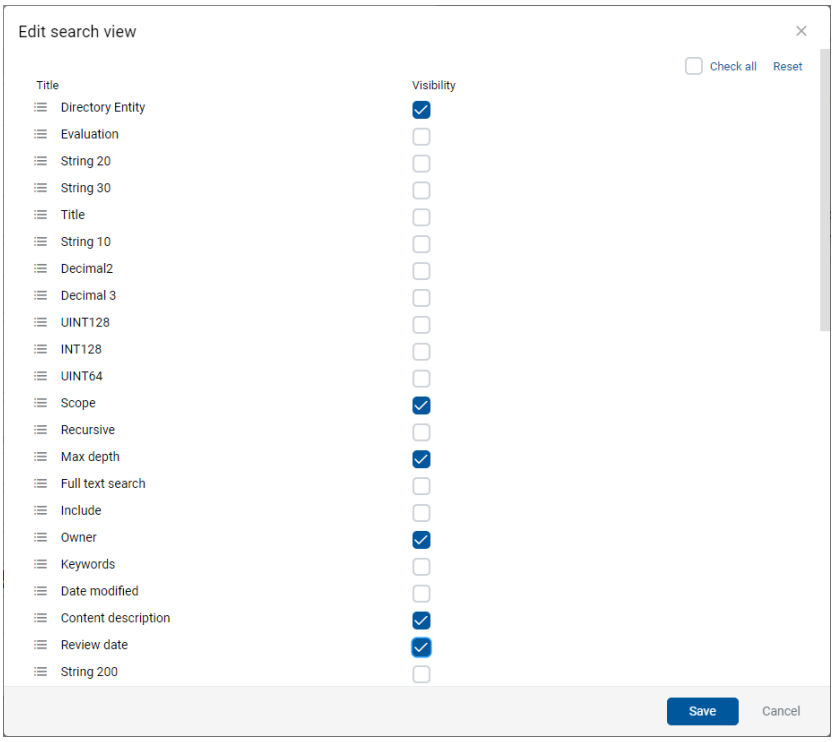

Image 230: Setting the attributes to define the search conditions

By moving the icon in front of the title of the attribute for defining the search conditions up or down, the user defines the sequence of the display of attributes in the search dialog box.

The user has the option of defining a single description for all selected entities.
By checking the checkbox, the user can check or uncheck all attributes for defining the search conditions simultaneously ("Check all").

The user selects “Reset” for the default display settings.

By confirming the selection (“Save”), the display settings are saved to the user profile and the set of displayed attributes for defining the search conditions is adjusted accordingly.

By selecting the “Cancel” button, the settings are not saved.

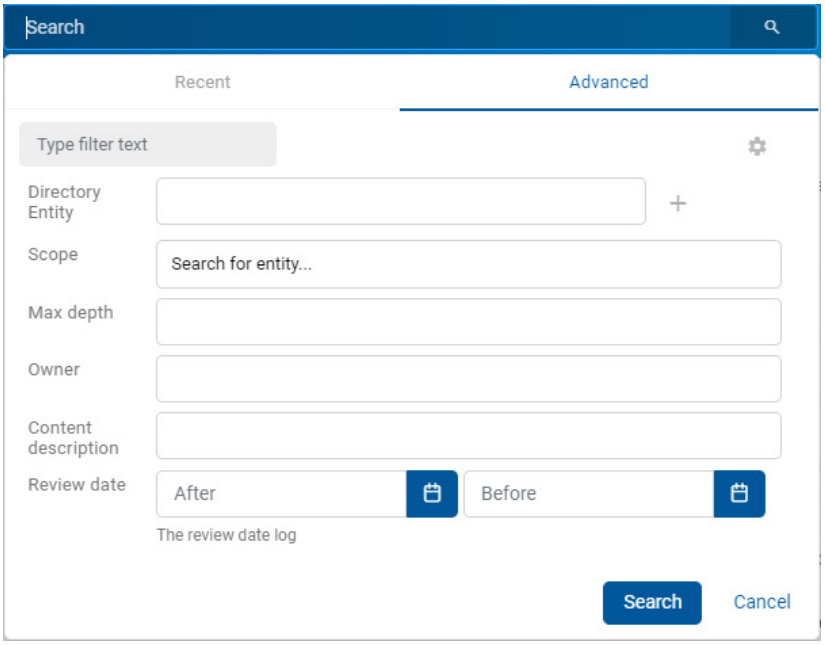

Image 231: Displaying the set of attributes for defining the search conditions

The user has the option of filtering the attributes for defining the search conditions.
By entering text in the Type filter text field, the set of displayed attributes is limited accordingly.

Example 1: The user previously searched by the value of the attribute Full text search = STATE DEPARTMENT. The user enters the search string "sc" in the Type filter entity field.
The set of attributes which will be searched is limited to attributes with titles containing the search string "sc". Additionally, the set of attributes for the search also contains the attribute Full text search with the value STATE DEPARTMENT.

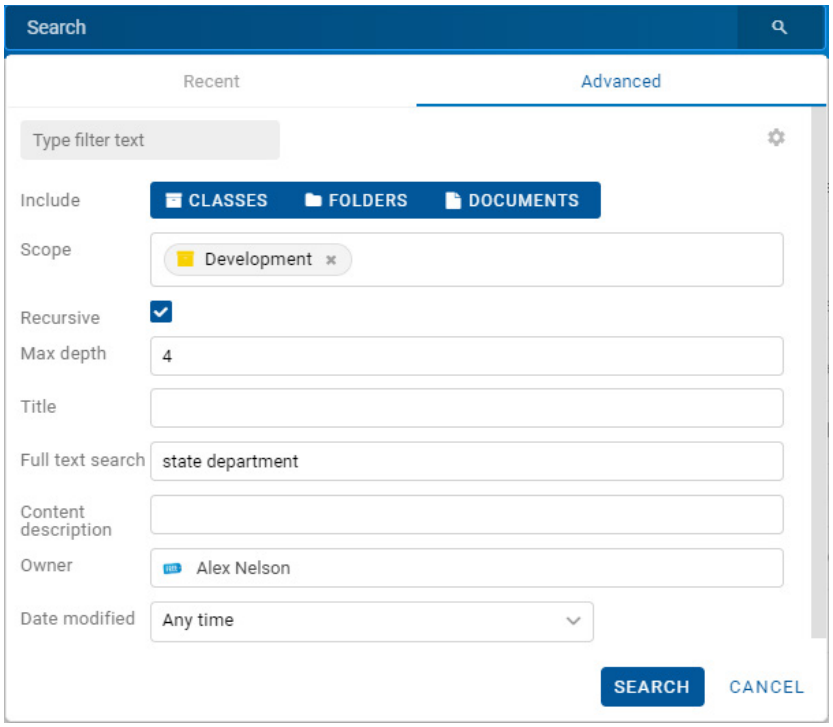

Image 232: Before entering the text of limiting the set of attributes for the search

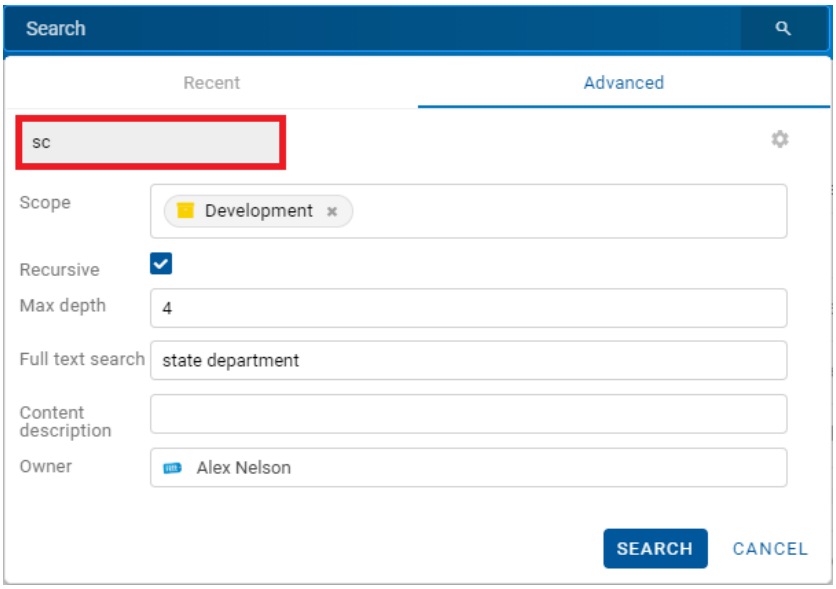

Image 233: After entering the text of limiting the set of attributes for the search

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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 234: Example of limiting the set of attributes for the search

4.3.7.1 Full text search

The user begins searching the full text of the content by entering a search string in the Search field in the header of the user interface. The user confirms it by selecting the icons , which denote a search or "Enter" on the keyboard.

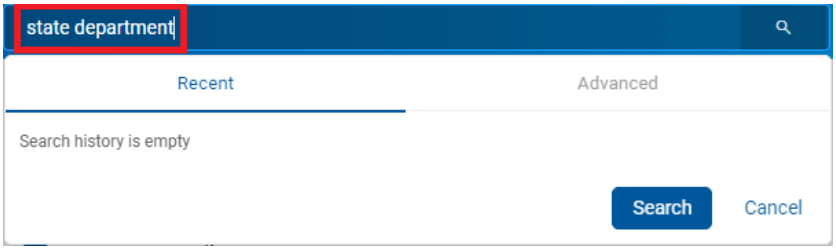

Image 235: Entering a search string in the Search field

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

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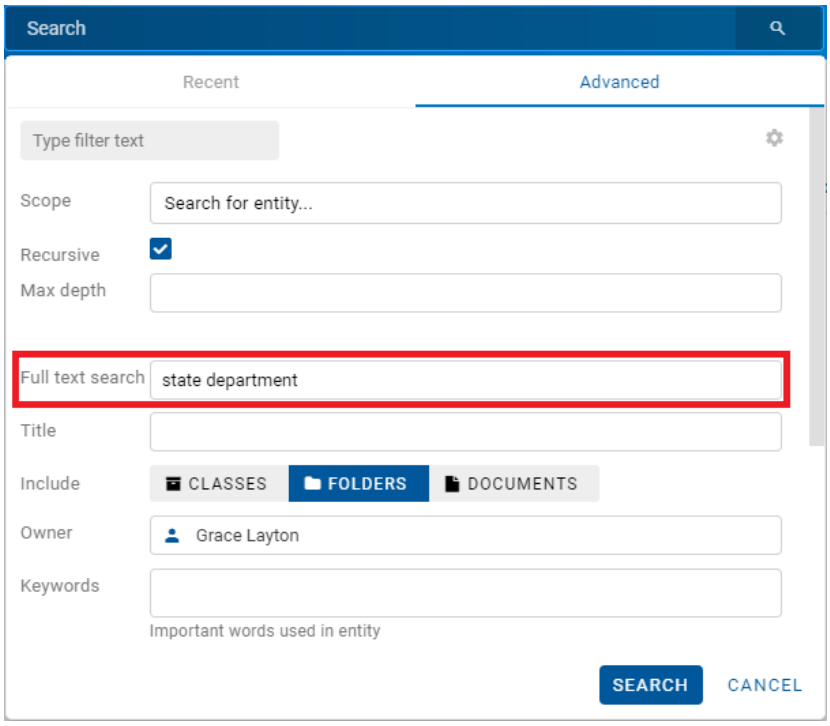

Image 236: Entering a search string in the Full text search field

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.

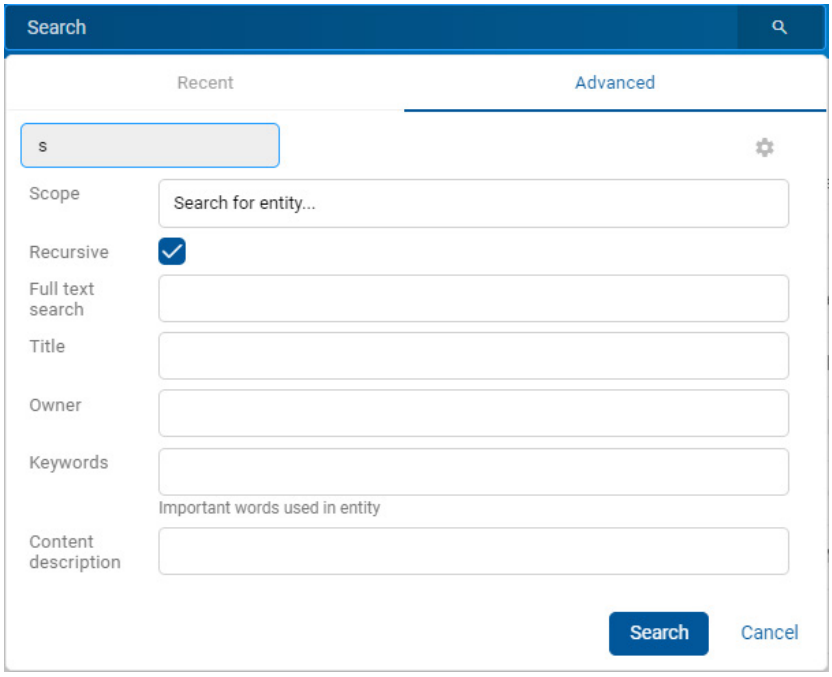

Image 237: Entering text to limit the set of attributes for the search

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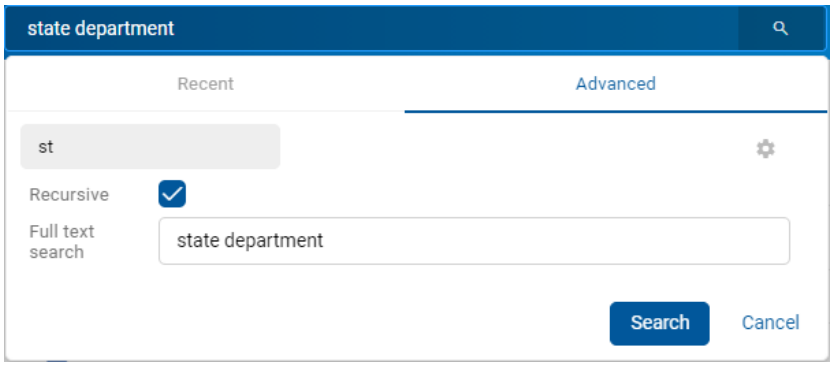

Image 238: Example of limiting the set of attributes for the search

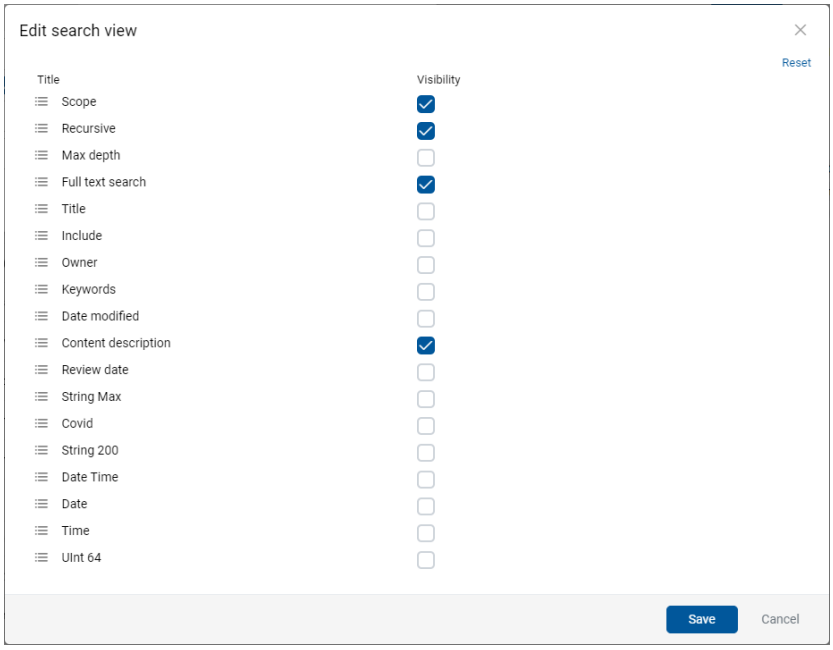

Image 239: Limiting the set of attributes for the search via the menu

After confirming the search, the user is shown the search results list in the central view. For each document containing content with the search string all versions of the content are shown with their titles, content type and icon.

By selecting the title (version) of the content, the document opens and shows the contents in preview mode.

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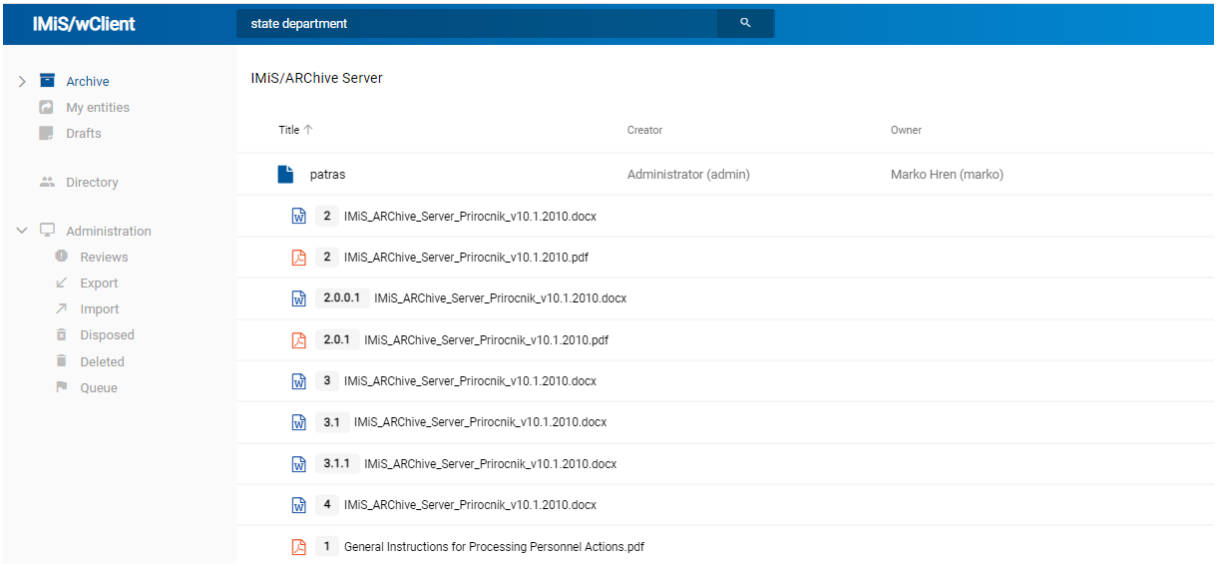

Image 240: Search results list showing content versions

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

When searching by the full text of the document content, an exact match to the metadata value is not necessary. For more information on searching by partial values see chapter Wildcard search.

Formats supported by the full text search function are:

- HTML, XML and similar formats.
- Microsoft Office, OpenOffice and iWork formats.
- RTF format.
- PDF format.
- Text formats.
- Audio format metadata (metadata of WAV, MIDI, MP3, MP4, OGG).
- Image format metadata (metadata of BMP, GIF, PNG, PSD; EXIF for JPEG, TIFF).
- Video format metadata (metadata of FLV, MP4).
- Email formats (PST, MBOX, EML).
- PKCS7 formats.
- Electronic publication formats (EPUB, FB2).
- Web feed and news formats (RSS, ATOM, IPTC, ANPA).

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- DWG format.
- CHM format.
- Font formats (TTF, AFM).
- Scientific formats (HDF, NETCDF, MAT).
- Program and library formats (ELF, PE).
- Compression formats (TAR, CPIO, ZIP, 7ZIP).

4.3.7.2 Searching by Metadata

The user can search by metadata by first selecting the field for entering the search string in the header of the user interface. In the "Search" dialog box in the section "Advanced", the user has the following fields available:

- Scope: the entity under which the search will be implemented.
- Recursive: checking this parameter means that the search is implemented on the selected entity and on all contained entities. On the contrary, by unchecking this parameter, the user limits the search to the selected entity and the 1st level of contained entities.
- Max depth: the numerical value defines the maximum search depth.

  Example: Setting the value "Search depth = 2" means that the search will be performed up to and including level 2 of the selected entity tree.

- Full text search: searching by the text of the content.
- Include: the type of entity for which the search will be performed. All entity types – documents, folders and classes are set by default. If all types or none are selected in the search dialog box, all entities are searched.
- Title: name of the entity.
- Owner: owner of the entity.
- Keywords: keywords related to the entity.
- Date modified: date of the last entity modification.

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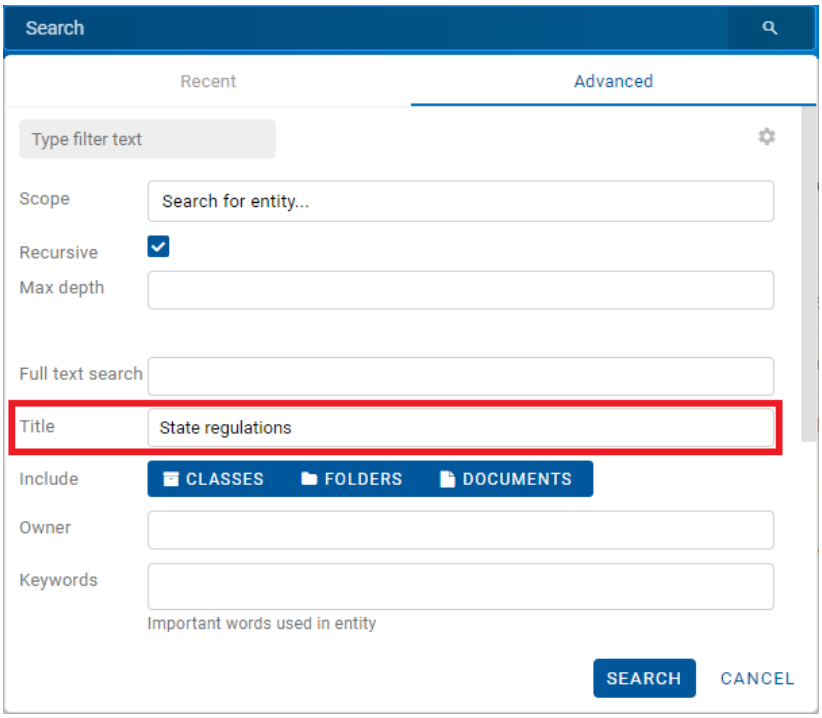

Image 241: A dialog box for searching by metadata

Besides the above-mentioned attributes, the user can also search by Custom attributes. The set comprises the attributes which are used in at least one entity.

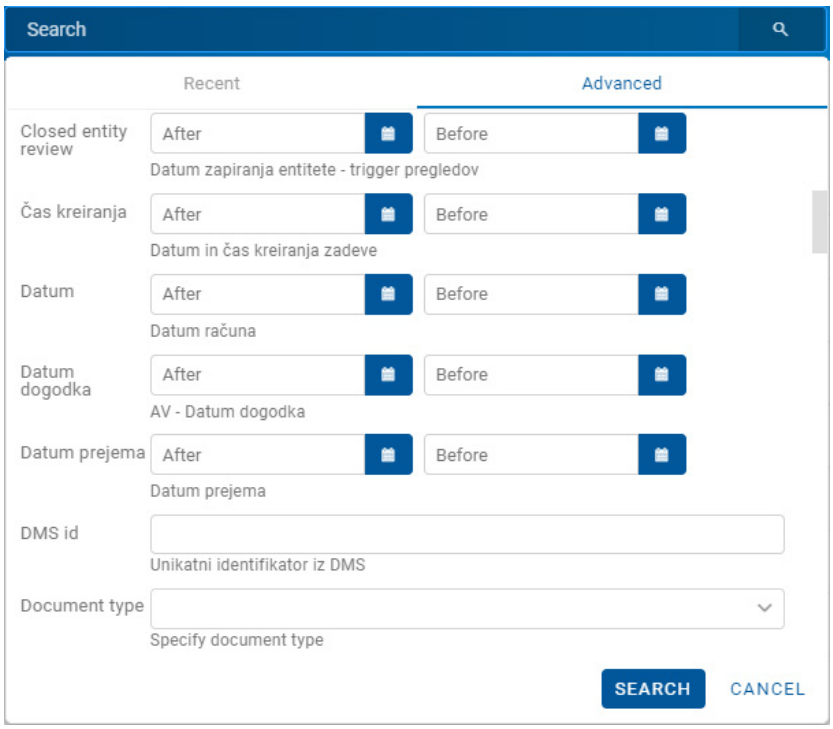

Image 242: A dialog box for searching by custom metadata

When choosing text metadata, the value must be entered. When searching text metadata, the value does not have to be identical. For more information on searching by partial values see chapter Wildcard search.

When searching metadata whose value is represented by the name of an IMiS®/ARChive Server user (for example the metadata Owner) the search string must be identical to the value of the metadata.
Instead of manually entering the title of the owner into the search string, the user selects it from the set of available users. To start the search, it is enough to enter two characters from the search string.

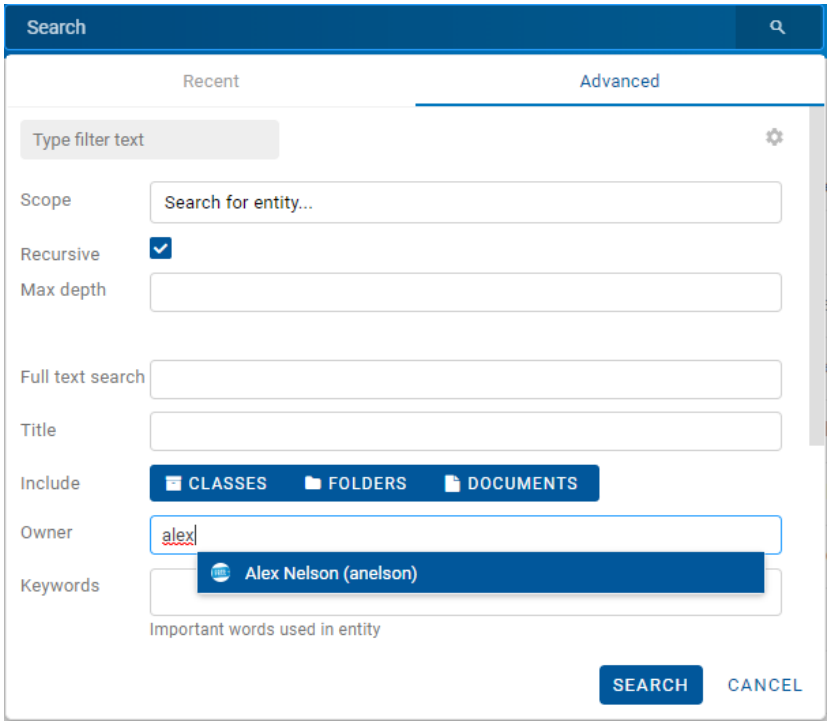

Image 243: A dialog box for searching by the metadata Owner

When searching by date, the user selects the icon or field for defining the value. From the list, the user selects the appropriate date and time of the start and/or end of date validity.

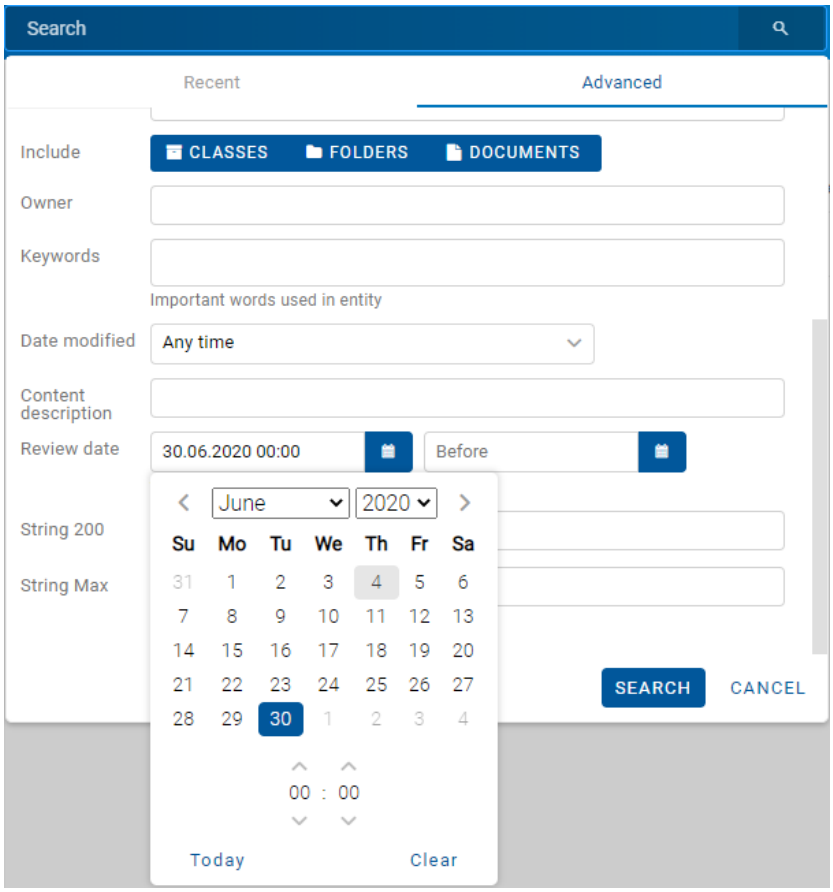

Image 244: Defining the time range for searching by date

4.3.7.3 Searching by Content descriptions

The user searches by the document content by first selecting the field for entering the search string in the header of the user interface. In the “Search” dialog box in the section “Advanced”, the user enters the search string into the Content description field.

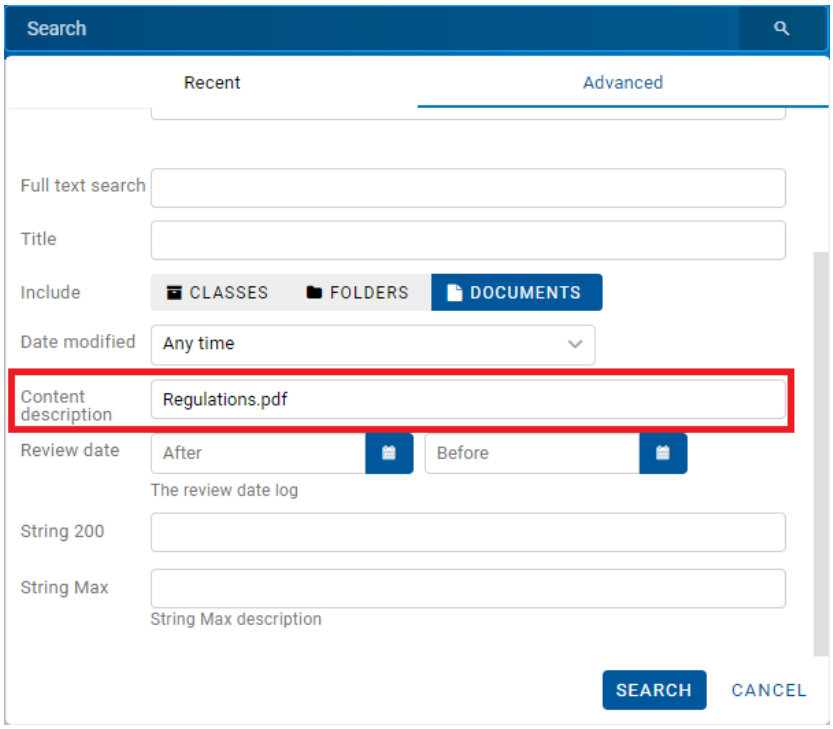

Image 245: A dialog box for searching by the content description

4.3.7.4 Wildcard search

The IMiS®/wClient also allow you to perform a Wildcard search by using special characters in the search string:

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

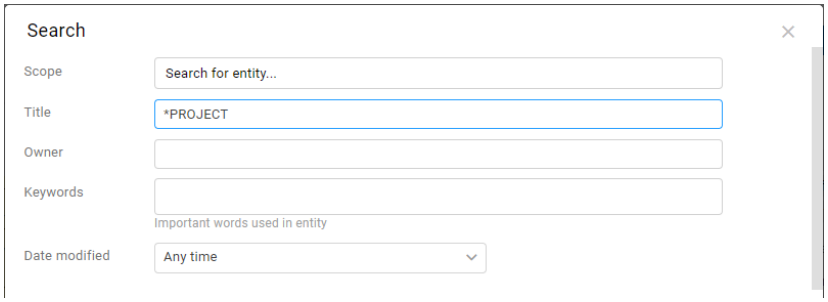

Image 246: Use of special characters in a search string

Example:

If the user is searching entities by the Title metadata, the search string:

- *"a*" searches for entities whose title starts with the letter "a".*
  For example, producing: "aa", "Administration", "authorization", "A-test" and "Auto Service".
- *" *traffic* " searches for entities that have a string of characters "traffic" in the title.*
  For example: "traffic light", "havy traffic", "road traffic jam".
- *"*en" searches for entities whose title ends with a string of characters "en".*
  For instance: "then", "when", "hen", "maiden".
- *"d?b" searches for entities whose title has a specified first and third letter (in this case "d" and "b"), while the second letter and all other letters can be random.*
  For example, producing: »debate«, "Debit", "dab" or "dubious claims"

Examples:

A user is searching for entities in the full text of the content. Based on the search string:

- ****test** returns an error. Such syntax is not allowed.*
- ***te*st** finds all document contents with words beginning with "te" and ending with "st" (i.e. telephonist, terrorist, ...).*
- ***te?t** finds all document contents in which the third letter of the word is unknown (i.e. test, text, ...).*
- ***test*** finds all document contents with the word »test« (i.e. tests, testing, ...).*
- ***test result** finds all document contents with words »test« or »result«.*
  The rule is that if there are no logical operators between the words, operator OR will be used.
- ***test AND result** finds all document contents with words »test« and »result«. Logical operators must be written in uppercase.*
- ***test result** finds all document contents with words »test result« written in succession.*
- ***test result*** finds all document contents with words »test result« written in succession, with the possibility that the second word can also be longer (i.e. results, resultados, ...)*

The search result is shown in the central view of the user interface.

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4.3.7.5 Searching by actual value

The user searches by actual value by entering the search string in the search box in the header of the user interface. The search string can consist of one or multiple simple search conditions, beginning with the string “raw:”.

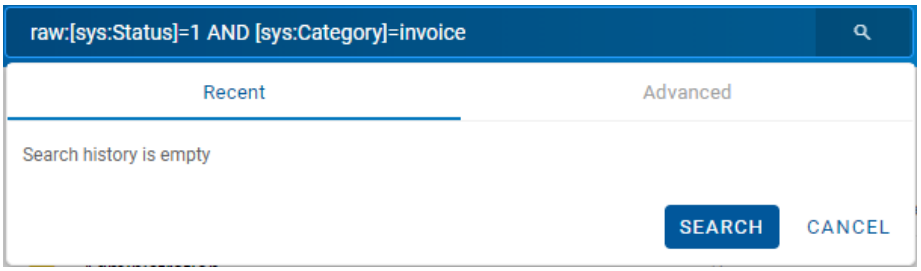

Image 247: The search string and the results of searching by actual value

4.3.7.6 Combined search

The user can also perform the following combinations of searches:

- By metadata and the full text of the content.
- By metadata and the content description.
- By the full text of the content and the content description.

The user performs a combined search by the title of the document content by first selecting the field for entering the search string in the header of the user interface. In the “Search” dialog box in the section “Advanced”, the user enters the search strings into the relevant fields.

Note:

The combined search takes the logical operator AND into account.

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4.3.7.6.1 Combined search by Metadata and Full text search

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

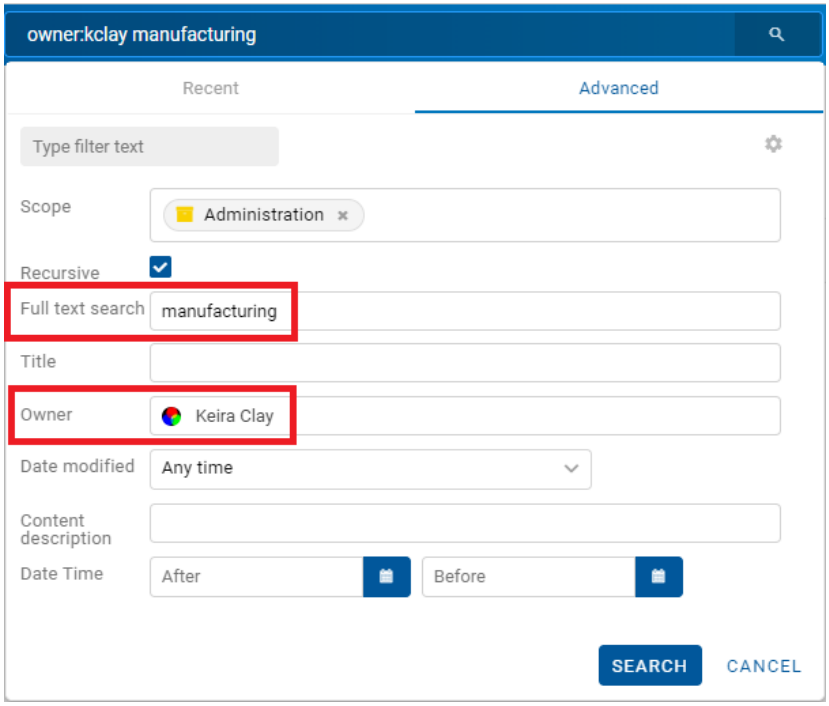

Image 248: Entering a search string in a combined search

The search result is all documents containing the searched metadata (e.g. Owner = Keira Clay) and whose content also contains the searched text (e.g. Full text search = manufacturing). The searched text can contain one or multiple simple search conditions.

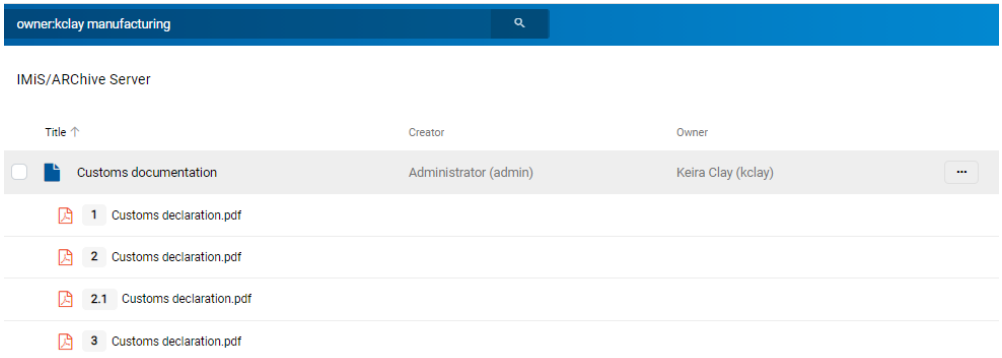

Image 249: Result of searching by metadata and the full text of the content

4.3.7.6.2 Combined search by Metadata and Content descriptions

The user can simultaneously search by metadata and by the content description.

The search result is all documents containing the searched metadata (e.g. Title = dispatch*) and whose content descriptions also contain the searched text (e.g. *shipping*).

*Note: When searching for values by content description, the character * (asterisk) must be added before and after the searched value.*

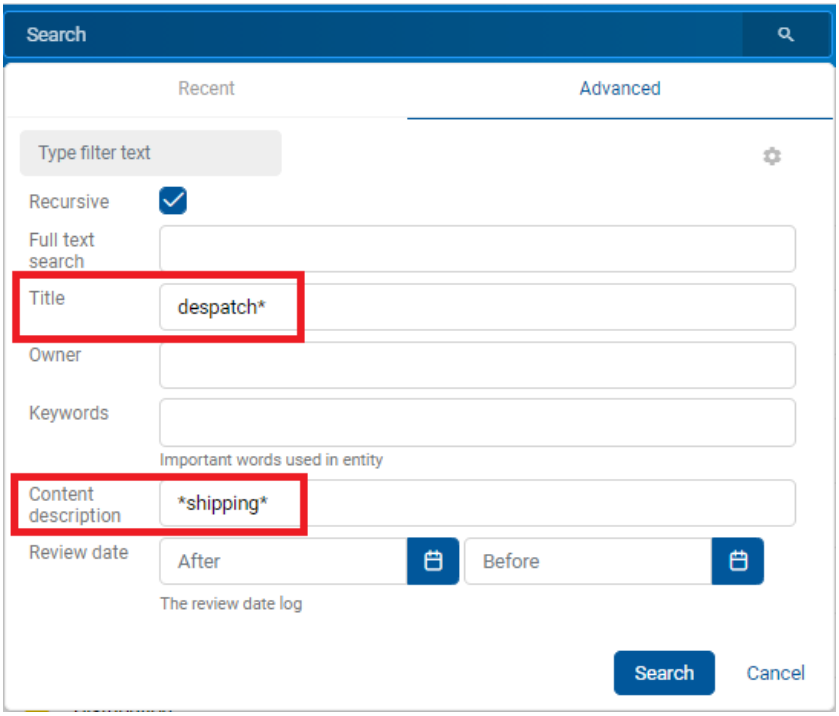

Image 250: Entering a search string when searching by metadata and the content description

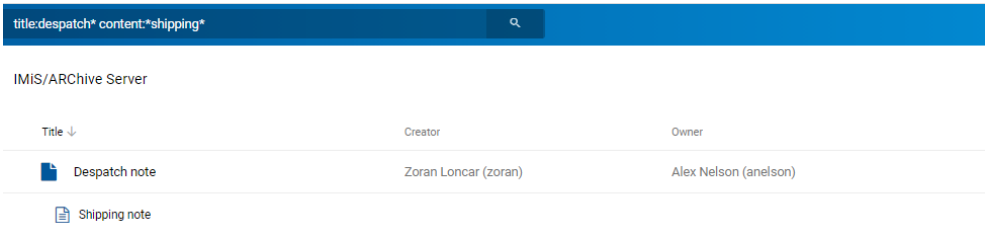

Image 251: Result of searching by metadata and the content description

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4.3.7.6.3 Combined search by Content descriptions and Full text search

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

The search result is all documents containing a specific search string in the content description (e.g. Content descriptions = customs*) and whose content also contains the searched text (e.g. Full text search = manufacturing).

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

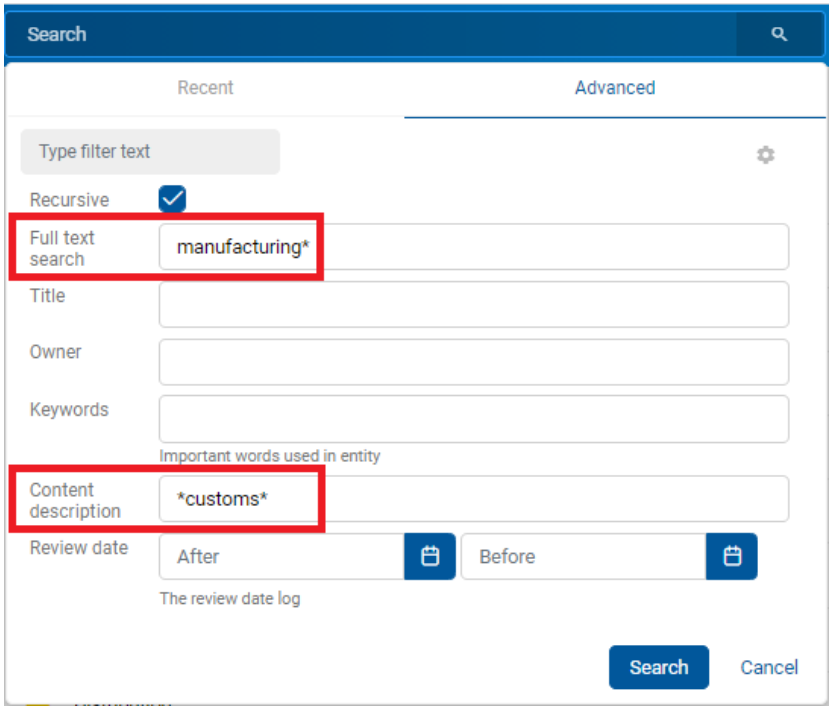

Image 252: Entering a search string when searching by the text of the content and the content description

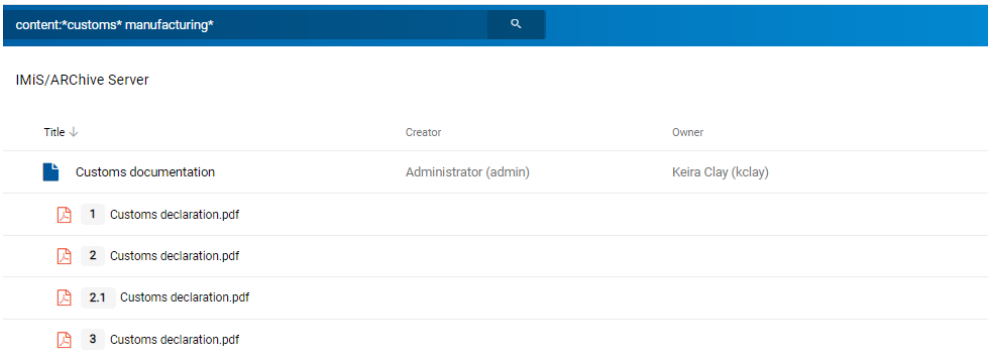

Image 253: Displaying the result of searching by the text of the content and the content description

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4.3.7.6.4 Search by Custom metadata

The user performs a combined search by the title of the document content by first selecting the field for entering the search string in the header of the user interface.

The user searches by custom metadata by first selecting the field for entering the search string in the header of the user interface. In the “Search” dialog box in the section “Advanced”, the user enters the search string into the selected custom field.

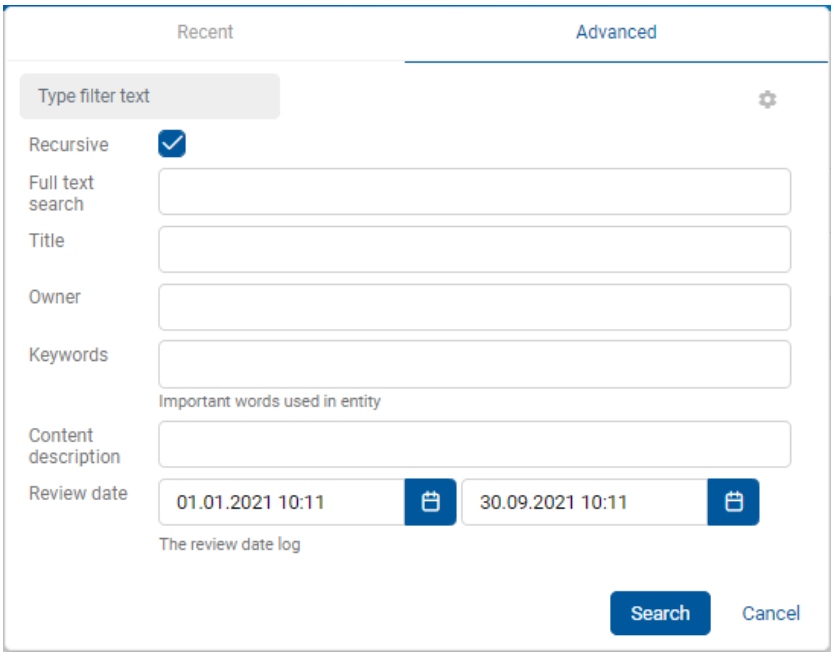

Image 254: Entering the search string when searching by a custom attribute

The search result is all the documents whose date values of the custom attribute “Review date” is between September 1st and September 30th 2021.

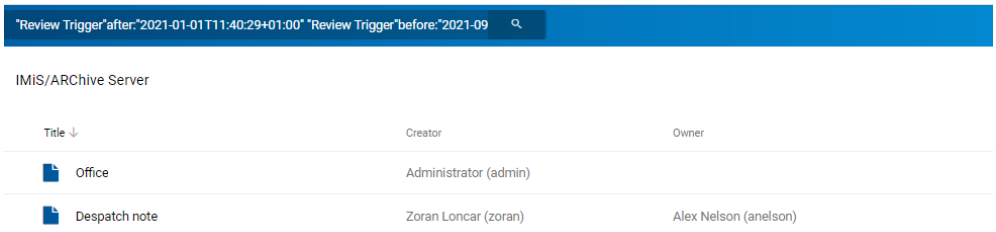

Image 255: Entering the search string when searching by a custom attribute

4.3.7.7 Searching Audit log events

By selecting the username or icon and the action Activity in the popup menu, a dialog box opens for searching for information on audit log events.

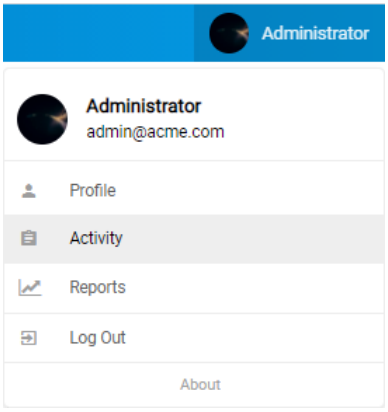

Image 256: Popup menu for reviewing audit log events

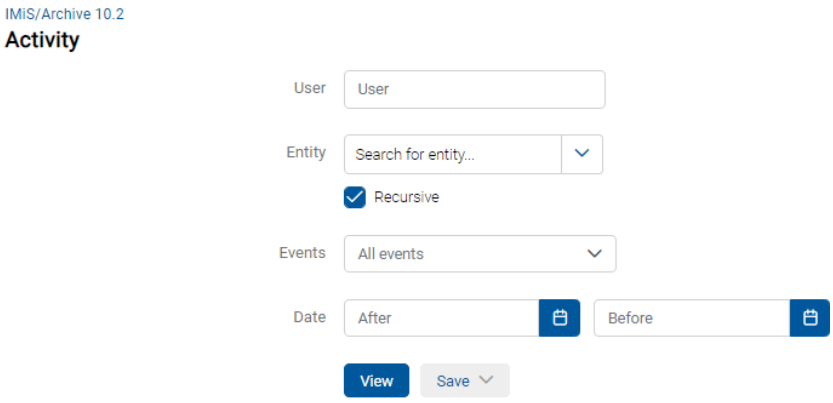

Image 257: Setting the parameters for searching audit log events

The user can specify the following settings:

- User: by entering the search string, the user selects the directory entity from the list to display information on selected audit log events.

Image 258: Selecting a directory entity from a list

- Entity: the user can select or define one of the following search modes based on which the information on selected audit log events will be shown:
  - Browse mode: selects an entity in the entity tree.

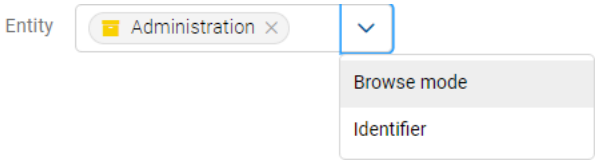

Image 259: Selecting an entity in the entity tree

  - Identifier: defines a unique entity identifier on the server.

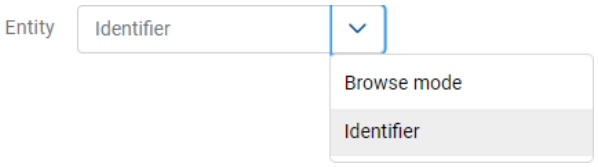

Image 260: Defining an entity identifier

- Recursive: checking this parameter means that the search is implemented on the selected entity and on all contained entities. On the contrary, by unchecking this parameter, the user limits the search to the selected entity and the first level of sub-entities.

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- Events: selecting the audit log events for which the information will be displayed.

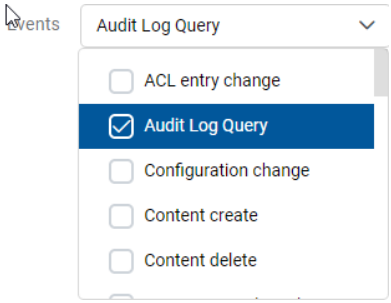

Image 261: Selecting audit log events

- After: start of the time period for displaying information on audit log events.
- Before: end of the time period for displaying information on audit log events.

Image 262: Selecting the time range and save format of audit log events

By selecting the action View, a list of audit log events that match the search criteria is shown by pages.

By selecting the action Save, a popup menu appears with the possible formats (CSV, XML) for saving information on audit log events.

Sequence	Time	User	Address	Computer	InternalAddress	Id	ClassificationCode	EventType	EventDetails
11	2020-04-01T09:00:24Z	anelson	127.0.0.1	SERVER		RSUtRqVPti7y7_zbaLvAJ471ogfuLy1m	C=3^C=8	ENTITY_REVIEWED	Retention policy conflict. No default reason available.
10	2020-04-01T09:00:24Z	anelson	127.0.0.1	SERVER		XB8d_bpJVjUoGxaD_0jm06OIDi-R2fk1	C=3^F=2020-000030	ENTITY_REVIEWED	Retention policy conflict. No default reason available.
9	2020-04-01T09:00:24Z	anelson	127.0.0.1	SERVER		ijddH_IP2TBdj6hQMITOEzLSP4A2SKDr	C=3^F=2020-000030^D=000001	ENTITY_REVIEWED	Retention policy conflict. No default reason available.
8	2020-03-19T13:27:48Z	anelson	192.168.50.15	Mozilla/5.0	2a01:260:4086:1282:100::b	zOGEGUVlgUMJDCOAGhTRkSaqh6nAPV3_	C=3^D=000034	ENTITY_OPEN_READ_ONLY	
7	2020-03-19T13:27:28Z	anelson	192.168.50.15	Mozilla/5.0	2a01:260:4086:1282:100::b	_-a2axJNwA7yNWeVJl9q1XgFqQKQWCEn	C=3^D=000033	ENTITY_OPEN_READ_ONLY	
6	2020-03-17T15:00:13Z	anelson	192.168.50.15	Mozilla/5.0	2a01:260:4086:1282:100::c	RSUtRqVPti7y7_zbaLvAJ471ogfuLy1m	C=3^C=8	ENTITY_OPEN_READ_WRITE	
5	2020-03-17T07:55:31Z	anelson	192.168.50.15	Mozilla/5.0	192.168.100.51	UI5xIqUKX70ano1FhnLNNnV_G2TJTR71	C=3	ENTITY_SAVE	
4	2020-03-17T07:55:31Z	anelson	192.168.50.15	Mozilla/5.0	192.168.100.51	UI5xIqUKX70ano1FhnLNNnV_G2TJTR71	C=3	PROPERTY_VALUE_CHANGE	Changed properties: sys:ExternalIds
3	2020-03-17T07:55:20Z	anelson	192.168.50.15	Mozilla/5.0	192.168.100.51	UI5xIqUKX70ano1FhnLNNnV_G2TJTR71	C=3	ENTITY_OPEN_READ_WRITE	
2	2020-03-12T14:12:03Z	anelson	192.168.50.15	Mozilla/5.0	2a01:260:4086:1282:100::5	XB8d_bpJVjUoGxaD_0jm06OIDi-R2fk1	C=3^F=2020-000030	ENTITY_SAVE	
1	2020-03-12T14:12:03Z	anelson	192.168.50.15	Mozilla/5.0	2a01:260:4086:1282:100::5	XB8d_bpJVjUoGxaD_0jm06OIDi-R2fk1	C=3^F=2020-000030	PROPERTY_VALUE_CHANGE	Changed properties: sys:Category, sys:Keywords
0	2020-03-12T14:11:33Z	anelson	192.168.50.15	Mozilla/5.0	2a01:260:4086:1282:100::5	XB8d_bpJVjUoGxaD_0jm06OIDi-R2fk1	C=3^F=2020-000030	ENTITY_OPEN_READ_WRITE	

Image 263: Saving audit log events in the CSV format

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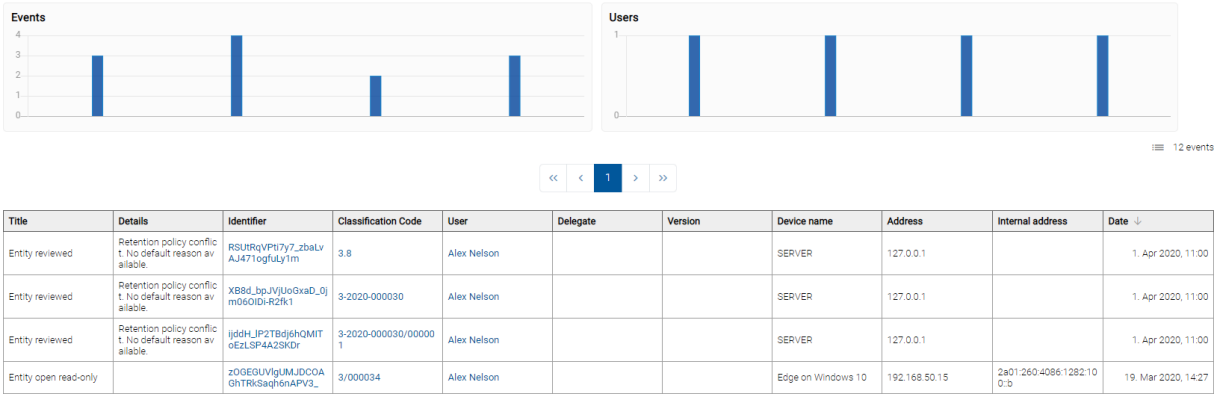
```
<?xml version="1.0" encoding="UTF-8"?>
<auditlog.query.resultset xsi:schemaLocation="http://www.imis.si/imisarc http://www.imis.si/imisarc/auditlog.xsd" xmlns="http://www.imis.si/imisarc" xmlns:xsi="http:/
  <sessions>
    <!--Audit query sessions.-->
    <session id="1098" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::5" dateTimeOpened="2020-03-12T09:10:12Z" username="anelson"
    <session id="1196" closureReason="0" address="192.168.50.15" internal_address="192.168.100.51" dateTimeOpened="2020-03-17T06:01:08Z" username="anelson" computerNa
    <session id="1222" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::c" dateTimeOpened="2020-03-17T14:44:31Z" username="anelson"
    <session id="1357" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::b" dateTimeOpened="2020-03-19T13:26:57Z" username="anelson"
    <session id="1954" closureReason="0" address="127.0.0.1" dateTimeOpened="2020-04-01T09:00:24Z" username="anelson" computerName="SERVER"/>
  </sessions>
  <events>
    <!--Audit query events.-->
    <!--Sort compare function is QuerySorter::CompareSESS_TS-->
    <event sessionId="1098" type="3" seq="0" dateTime="2020-03-12T14:11:33Z" classificationCode="C=3^F=2020-000030" context="XB8d_bpJVjUoGxaD_0jm06OIDi-R2fk1"/>
    <event sessionId="1098" type="9" seq="1" dateTime="2020-03-12T14:12:03Z" classificationCode="C=3^F=2020-000030" context="XB8d_bpJVjUoGxaD_0jm06OIDi-R2fk1" message
    <event sessionId="1098" type="4" seq="2" dateTime="2020-03-12T14:12:03Z" classificationCode="C=3^F=2020-000030" context="XB8d_bpJVjUoGxaD_0jm06OIDi-R2fk1"/>
    <event sessionId="1196" type="3" seq="3" dateTime="2020-03-17T07:55:20Z" classificationCode="C=3" context="UI5xIqUKX70ano1FhnLNNnV_G2TJTR71"/>
    <event sessionId="1196" type="9" seq="4" dateTime="2020-03-17T07:55:31Z" classificationCode="C=3" context="UI5xIqUKX70ano1FhnLNNnV_G2TJTR71" message="Changed prop
    <event sessionId="1196" type="4" seq="5" dateTime="2020-03-17T07:55:31Z" classificationCode="C=3" context="UI5xIqUKX70ano1FhnLNNnV_G2TJTR71" message="get"/>
    <event sessionId="1222" type="3" seq="6" dateTime="2020-03-17T15:00:13Z" classificationCode="C=3^C=8" context="RSUtRqVPti7y7_zbaLvAJ471ogfuLy1m"/>
    <event sessionId="1357" type="2" seq="7" dateTime="2020-03-19T13:27:28Z" classificationCode="C=3^D=000033" context="_-a2axJNwA7yNWeVJl9q1XgFqQKQWCEn"/>
    <event sessionId="1357" type="2" seq="8" dateTime="2020-03-19T13:27:48Z" classificationCode="C=3^D=000034" context="zOGEGUV1gUMJDCOAGhTRkSaqh6nAPV3_"/>
    <event sessionId="1954" type="26" seq="9" dateTime="2020-04-01T09:00:24Z" classificationCode="C=3^F=2020-000030^D=000001" context="ijddH_lP2TBdj6hQMITOEzLSP4A2SKD
    <event sessionId="1954" type="26" seq="10" dateTime="2020-04-01T09:00:24Z" classificationCode="C=3^F=2020-000030" context="XB8d_bpJVjUoGxaD_0jm06OIDi-R2fk1" messa
    <event sessionId="1954" type="26" seq="11" dateTime="2020-04-01T09:00:24Z" classificationCode="C=3^C=8" context="RSUtRqVPti7y7_zbaLvAJ471ogfuLy1m" message="Retent
  </events>
```

Image 264: Saving audit log events in the XML format

The number of events and users for each day in the selected time period is shown in graphs.



Title	Details	Identifier	Classification Code	User	Delegate	Version	Device name	Address	Internal address	Date
Entity reviewed	Retention policy conflict. No default reason available.	RSUtRqVPti7y7_zbaLvAJ471ogfuLy1m	3.8	Alex Nelson			SERVER	127.0.0.1		1. Apr 2020, 11:00
Entity reviewed	Retention policy conflict. No default reason available.	XB8d_bpJVjUoGxaD_0jm06OIDi-R2fk1	3-2020-000030	Alex Nelson			SERVER	127.0.0.1		1. Apr 2020, 11:00
Entity reviewed	Retention policy conflict. No default reason available.	ijddH_lP2TBdj6hQMITOEzLSP4A2SKDr	3-2020-000030/000001	Alex Nelson			SERVER	127.0.0.1		1. Apr 2020, 11:00
Entity open read-only		zOGEGUVlgUMJDCOAGhTRkSaqh6nAPV3_	3/000034	Alex Nelson			Edge on Windows 10	192.168.50.15	2a01:260:4086:1282:100::b	19. Mar 2020, 14:27

Image 265: Result of searching by audit log events

By selecting the icon the user defines which information will be shown in the columns.

In the top right part of the view, a popup menu appears with the following options:

- Identifier: unique identifier of the entity on the IMiS®/ARChive Server.
- Classification code: the entity classification code for displaying information on audit log events.
- User: the name of the selected user for displaying information on audit log events.
- Delegate: a user presented as a person authorized by another user in the authentication process and who executed an operation on that user's behalf.
- Version: the entity version for which data on selected audit log events will be displayed. If it is not a document, the value is empty.

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- Device name: the name of the device from where the request to perform an action on the selected entity came.
- Address: the network address from where the request to perform an action on the selected entity came.
- Internal address: the IP address, which is set by opening a new session.

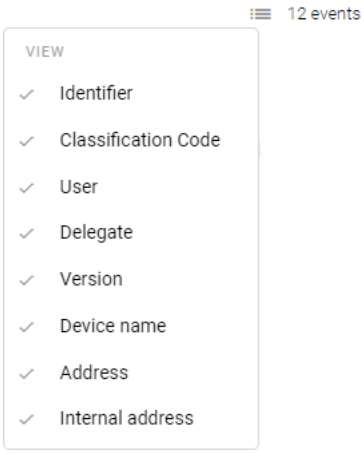

Image 266: Selecting information shown in columns

4.3.8 Archiving email messages

The IMiS®/wClient enables users to:

- Capture the received and sent email messages with corresponding metadata and attachments, depending on the IMiS®/ARChive Server settings.
- Creating and saving email messages based on the template “Email”.

To enable capture, the server must be configured with at least one template that contains email message attributes Email attributes.

4.3.8.1 Capturing received and sent emails

The user can capture a received or sent email directly from the messaging client (MS Outlook, HCL Notes, etc.) and save it to the classification scheme of IMiS®/ARChive Server.

The user arranges the IMiS®/wClient and email client windows so that they are both visible on screen. By holding down the left mouse button, the user drags the selected email messages to the central view of the IMiS®/wClient.

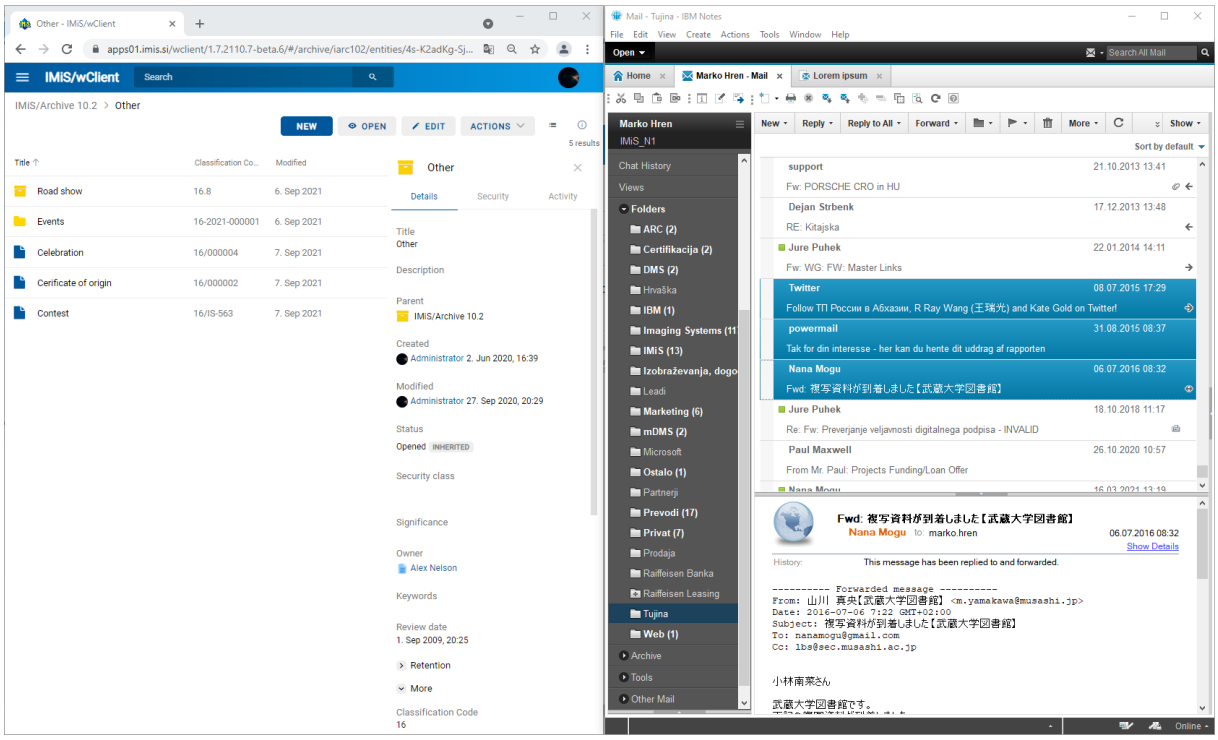

Image 267: Preparing the environment for transferring an email message from the email client to the archive

The user captures email messages by using the Drag and drop functionality.
The user marks one or several email messages, including their attachments, in the email client and drags them to the selected class or folder in the classification scheme in the IMiS®/wClient.

If a window appears notifying user that he can drop the selected email message, this means that a popup window for creating an entity will appear when the email message is dropped. If the email is recognized successfully and it is possible to create entities with a template that enables email, the Email tab will be shown.

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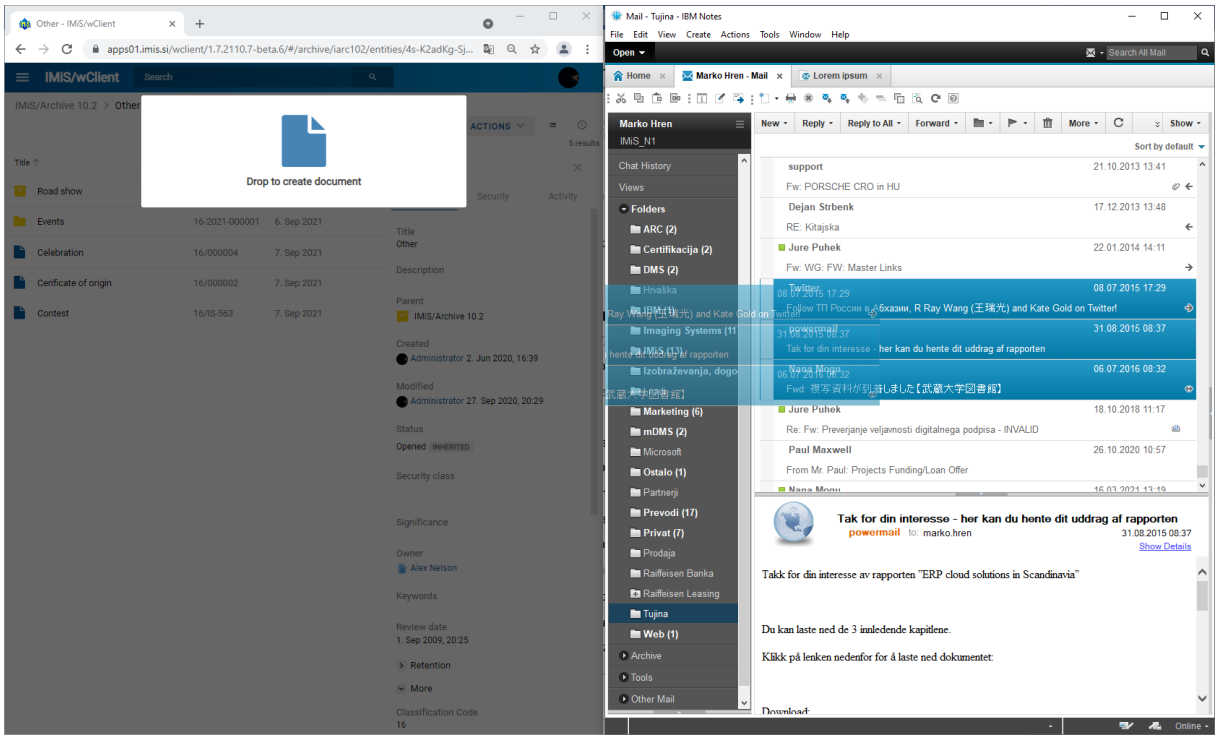

Image 268: Dropping the email message to the selected entity

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

4.3.8.1.1 Editing email message data

In the Details tab the user can view or edit the following metadata of the email message:

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

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- Keywords: keywords related to the entity. Attribute can have multiple values.
- Categories: the entity view mode.
- Content: the content of the email message and attachment, each in its own content. This attribute is read-only.
- External identifiers: a list of the entity's unique external identifiers on the server.

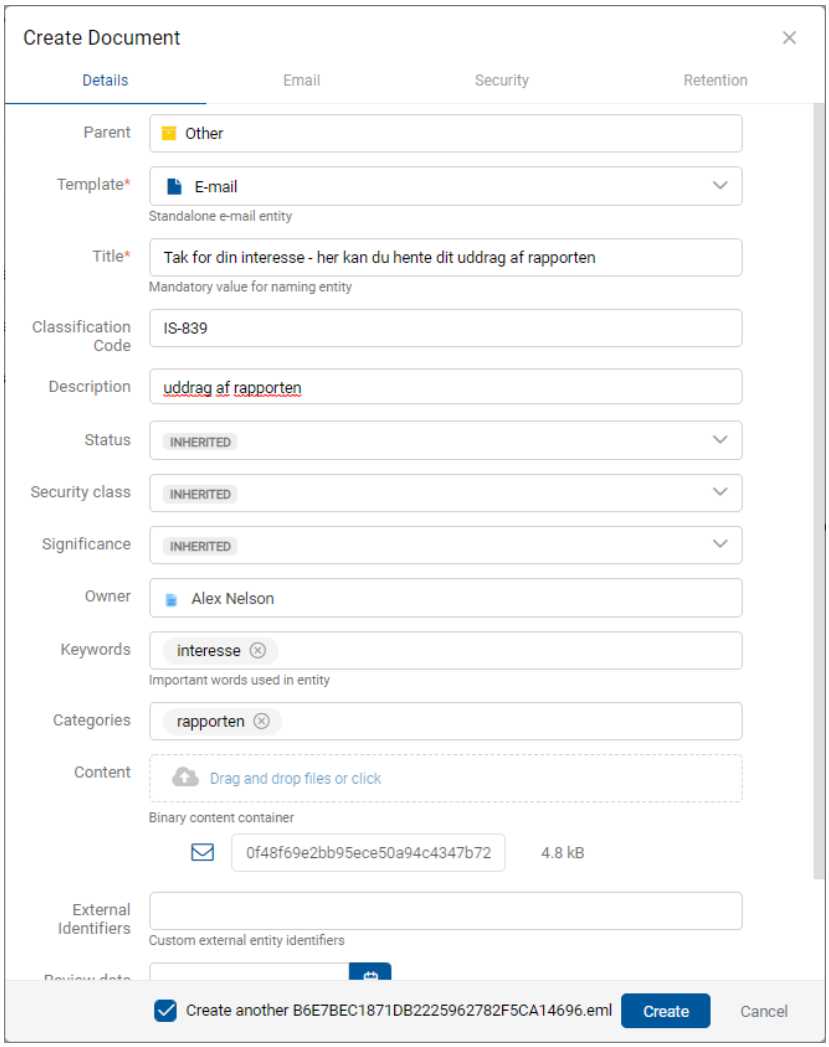

Image 269: Viewing and editing the details of an email message before saving

In addition to the above-mentioned attributes, the user can also edit the so-called Custom attributes, which are predefined by the template.

When the selected email message is moved to the IMiS®/wClient, the value of the Title attribute is automatically transferred to the Content field, and contents containing email details are created. If the email contains additional contents, they too are transferred.

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If the user is transferring multiple email messages simultaneously, the parameter for editing the next message is enabled by default in the dialog box for editing email messages.

Image 270: Example of selecting the parameter for editing the next email message

If the user wants to create a new entity after creating the last transferred email message in the classification scheme, the user can do so by checking the parameter “Create another”.

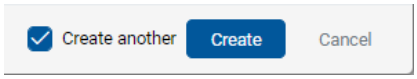

Image 271: Example of selecting the parameter for creating a new entity

After confirming the entry and selection of attribute values with the Create button, the selected messages are automatically transferred to the desired location in the classification scheme together with their metadata and content and are saved to the IMiS®/ARChive Server.

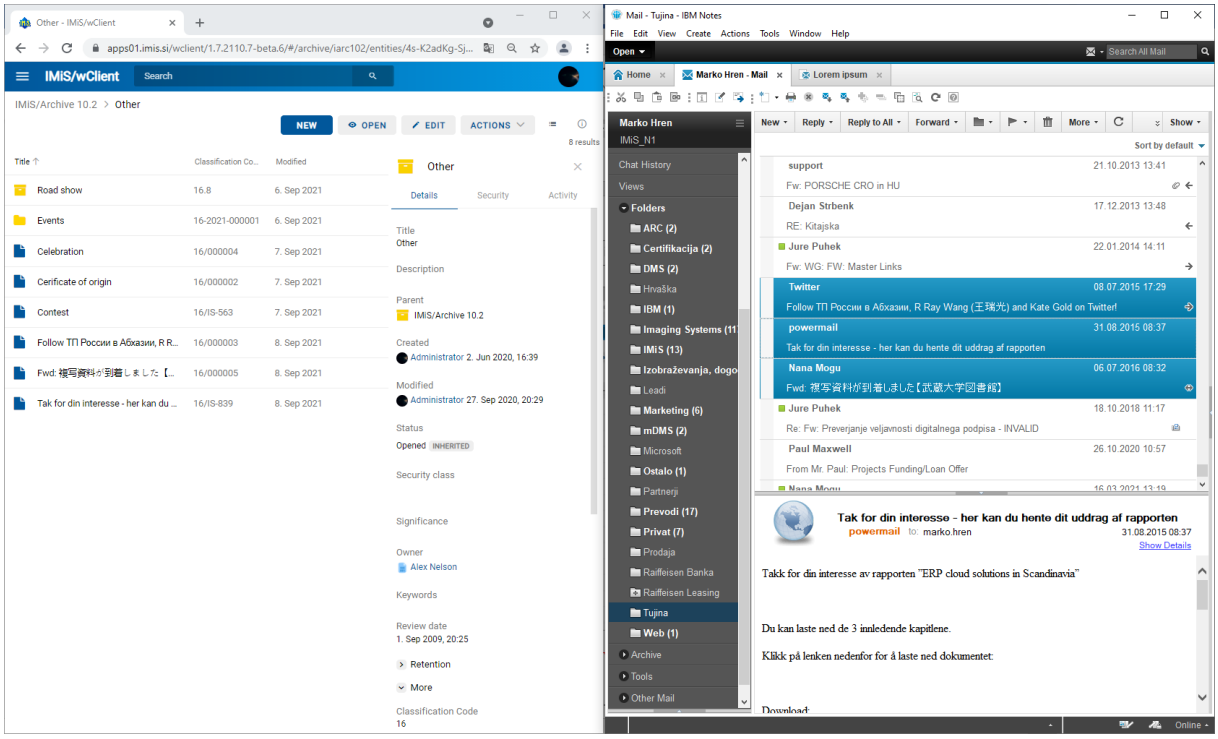

Image 272: Displaying a saved email message on the list of entities

In the Details tab, the user can see all the content that was saved together with the email message in the editing mode. In the Content field the original email message in the EML format and the recognized email attachments are created. Adding new contents is disabled, as is the execution of actions on the contents shown on the list.

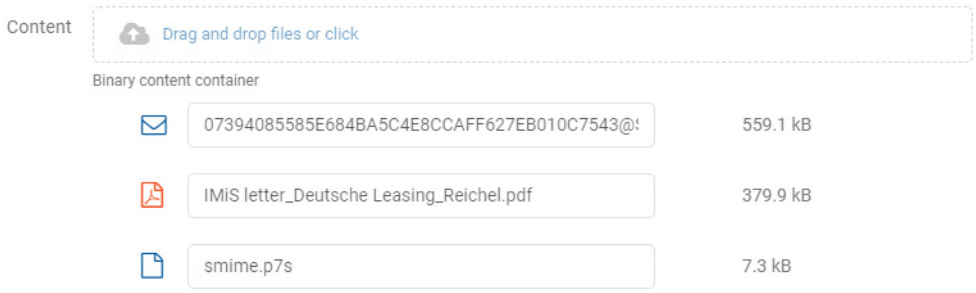

Image 273: Contents of the email message

4.3.8.2 Creating email messages

A user can create an email message by selecting the relevant template from the set of available templates.

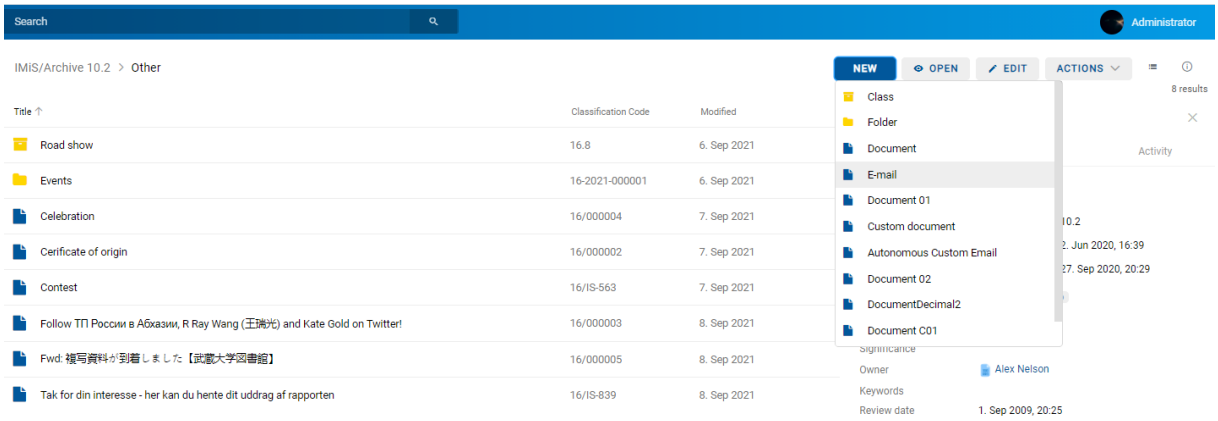

Image 274: Selecting a template for creating an email message

The user selects a file in the EML format from the file system.

Image 275: Selecting an EML file

Image 276: Confirming the selection of an EML file

After selecting the action “Next”, the user is shown the email message data, which the user can then review and edit the next entity metadata.
For more information see chapter Editing email message data.

4.3.8.3 Functionality description

After viewing and confirming the email message with the Create button, the content of the email message is parsed at the level of IMiS®/ARChive Server (version 10.1.2010 or above) and is copied to the appropriate location in the classification scheme, in the form of an EML file. For each email message, the IMiS®/wClient creates a new document containing the original message, the metadata and any captured content.

The following metadata (when present) is automatically extracted from the email message and is visible to the user in the Email tab:

- Subject: the subject of the message.
- From: email address of the sender.
- To: email addresses of recipients.
- CC: email addresses of the carbon copy recipients.
- BCC: email addresses of hidden recipients.
- Date«: the date and time the message was sent or received.
- Message Id: automatically generated message identifier.
- Priority: priority status of the email.
- Signed: a value that registers if the email message was electronically signed.

The Date and Sender email metadata are mandatory.
If one of these is not successfully captured, the message will not be saved.

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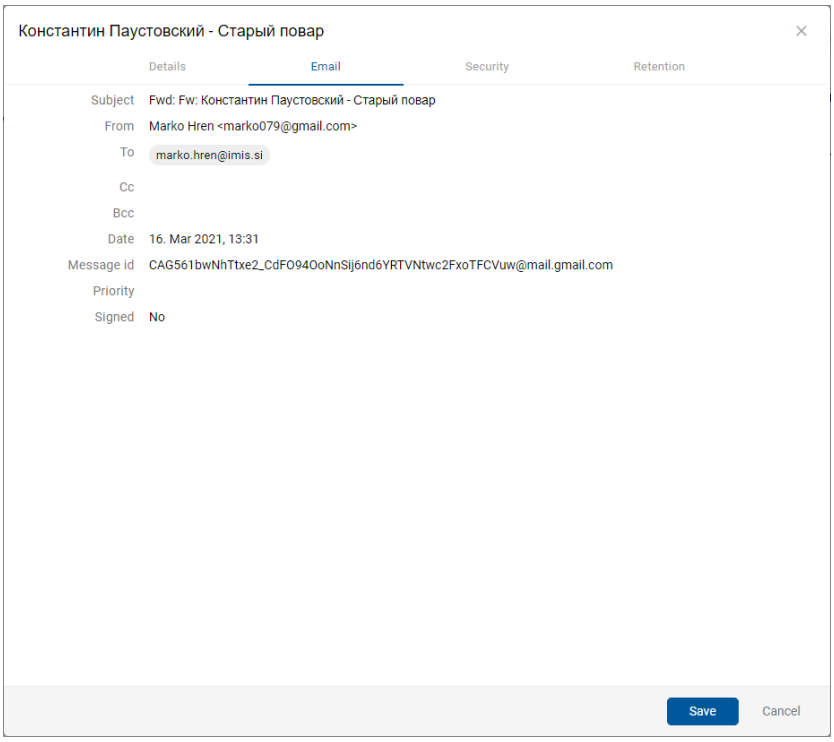

Image 277: Display of the metadata transferred from the email message

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.

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Warning:

Depending on the settings of the IMiS®/ARChive Server, authenticity evidence is created in certain intervals. The default setting is 5 minutes. The evidence thus becomes available when this time period has elapsed.

In case authenticity evidence for the selected entity already exists on the archive, the user can obtain authenticity evidence also by selecting the icon GET in the set More of the Details tab in the right view.

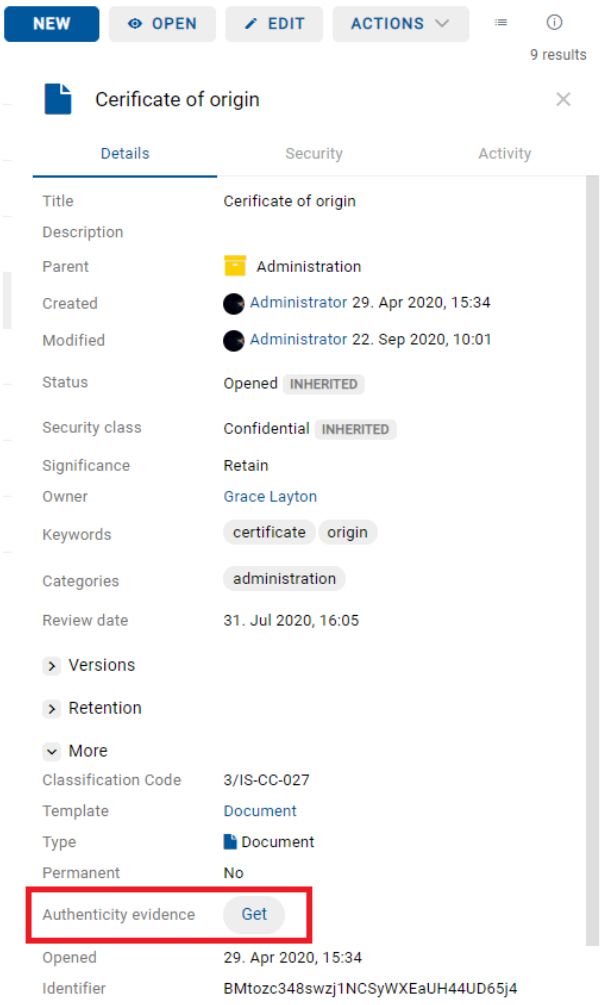

Image 278: Obtaining authenticity evidence in the Details tab

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

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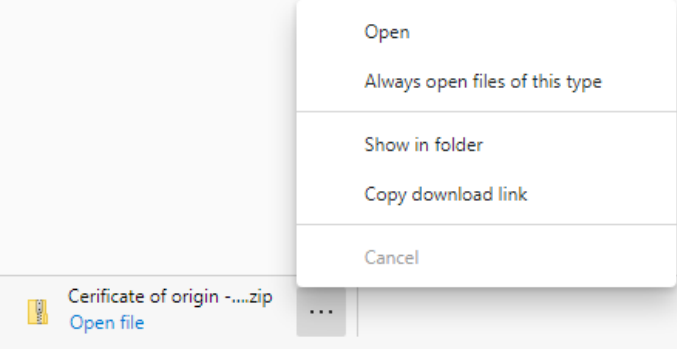

Image 279: Information for the user about saving a directory with authenticity evidence

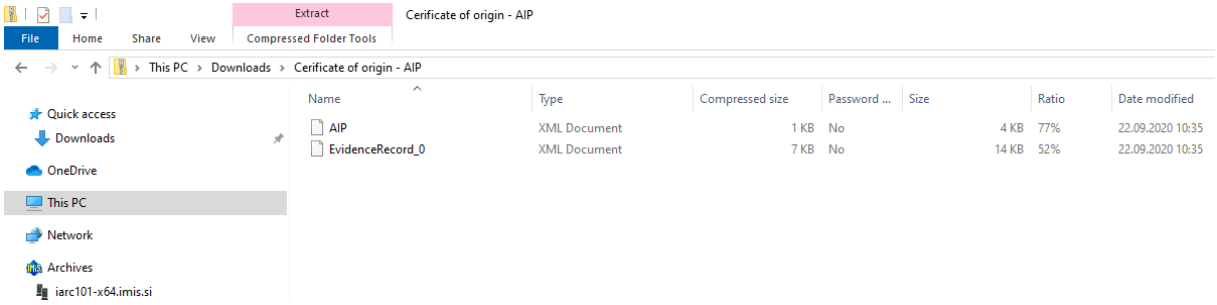

Image 280: A directory with two files containing authenticity evidence

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

Image 281: Example archive information package

```
<?xml version="1.0" encoding="UTF-8"?>
<EvidenceRecord xmlns="http://www.setcce.org/schemas/ers" Version="1.0">
<ArchiveTimeStampSequence>
<ArchiveTimeStampChain Order="1">
<DigestMethod Algorithm="http://www.w3.org/2000/09/xmldsig#sha1"/>
<CanonicalizationMethod Algorithm="http://www.w3.org/TR/2001/REC-xml-c14n-20010315"/>
<ArchiveTimeStamp Order="1">
<HashTree>
<Sequence Order="1">
<DigestValue>RiHMqrhrGATA/fDYJVO2lVg4fTw=</DigestValue>
<DigestValue>dawWHxN2luddA7O+NGHYNd3ApG8=</DigestValue>
</Sequence>
<Sequence Order="2">
<DigestValue>vqBElqW7kGPUaFB/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: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/SI-TSA-politika-za-casovni-zig-1.pdf"/>
<ts:Digest>
<ds:DigestMethod Algorithm="http://www.w3.org/2000/09/xmldsig#sha1"/>
<ds:DigestValue>kKsYK3bWkp5Zc/wbgssA/XIbNsA=</ds:DigestValue>
</ts:Digest>
<ts:SerialNumber>108487637460...6624147310345175</ts:SerialNumber>
<ts:CreationTime>2014-04-02T09:45:00.093Z</ts:CreationTime>
<ts:Nonce>7949411139179750976</ts:Nonce>
</ts:TimeStampInfo>
</dsig:Object>
</dsig:Signature>
</TimeStampToken>
<CryptographicInformationList>
<CryptographicInformation Order="1"
Type="CERT">MIIEHDCCAwSgBAgIE...z9Oz6gk/2vorAfGEhuB9nBxVeoQp</CryptographicInformation>
<CryptographicInformation Order="2"
Type="CRL">MIISKTCCERECAQEwDQYJ....pYO2SYQMkw819LR9I/YOFg</CryptographicInformation>
</CryptographicInformationList>
</TimeStamp>
</ArchiveTimeStamp>
</ArchiveTimeStampChain>
</ArchiveTimeStampSequence>
</EvidenceRecord>

Image 282: Example evidence record

4.3.10 Reporting

The user can make reports on:

- folders
- documents
- contents
- retention
- reviews
- access
- classification scheme
- entities
- deleted entities
- entities waiting for deletion.

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The user can access reports by selecting the username or icon and the action "Reports" in the popup menu.

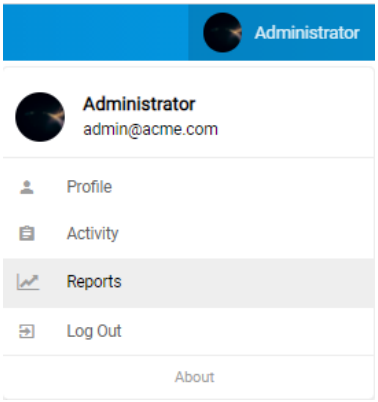

Image 283: Popup menu for selecting a report

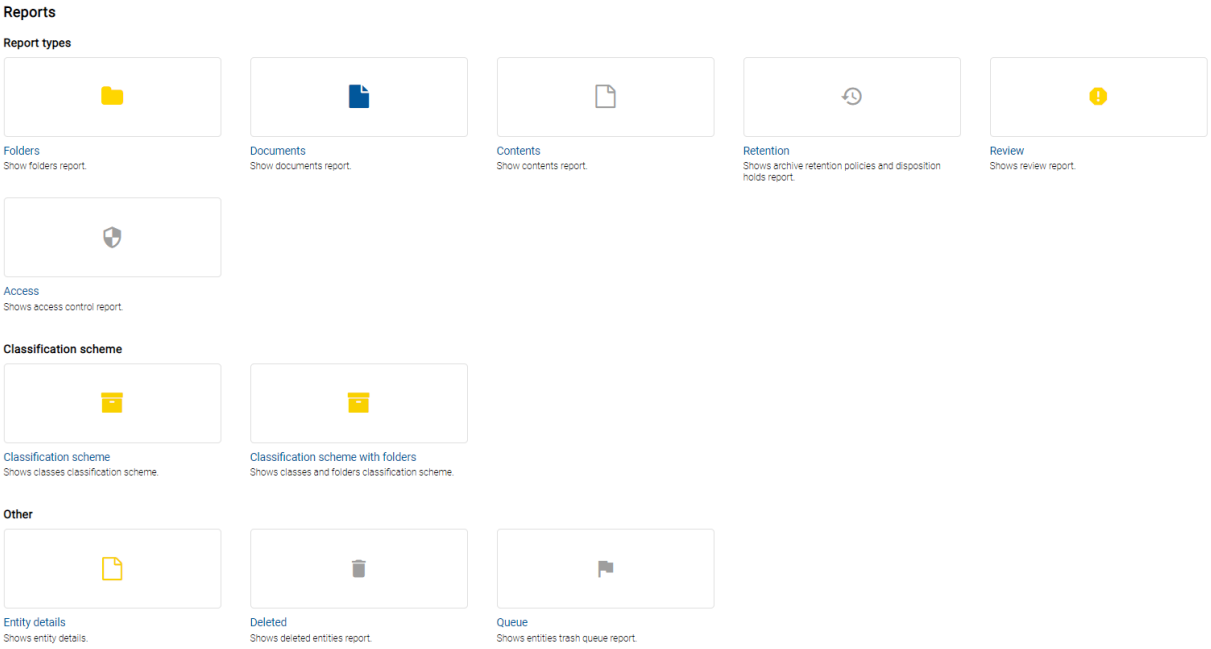

Image 284: Review of available reports

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4.3.10.1 The Folder report

A folder report contains information about all the folders inside the selected archive, class or folder. The user creates it by selecting the icon or the action “Folders” in the “Report types” section.

By selecting the root of the archive or selected entity, the user defines the scope of the report.

By checking of the “Recursive” parameter, the user defines that the report includes the selected entity, and all contained entities. On the contrary, by unchecking this parameter, the user limits the search to the selected entity and the first level of sub-entities.
The report will list all folders for the user throughout the archive or under the selected entity.
After selecting the action “Next”, the report is prepared.

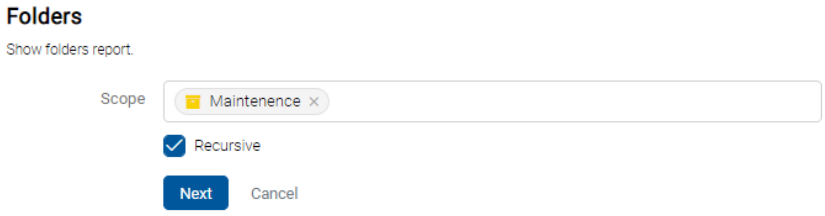

Image 285: Defining the scope of the folders report

Note: In the case of a longer report the user is first shown the notification “Preparing report”, followed by an indicative timeframe for preparing the report.

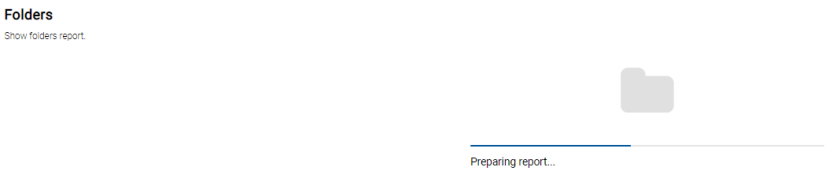

Image 286: The estimated timeframe for preparing the folders report

The report header provides the following information to the user:

- Scope: the scope of the report.
- Classification code: the classification code of the selected entity in the classification scheme.
- Number of folders: the number of folders included.

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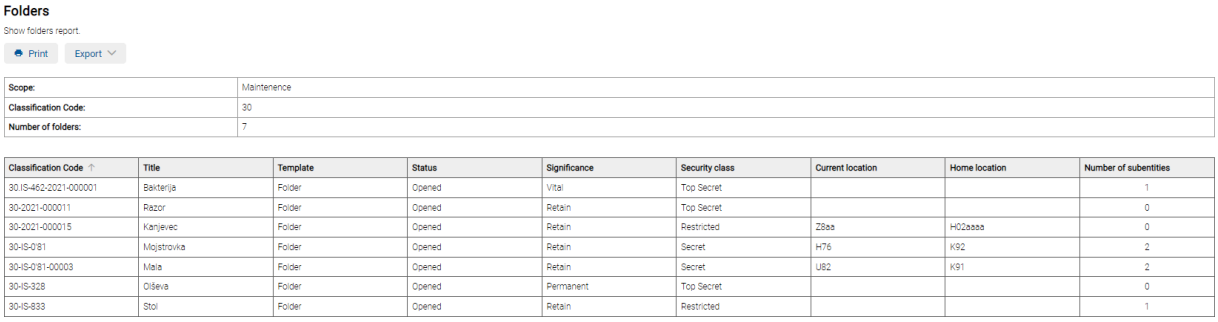
Information about folders is listed in the following columns:

- Classification code: the classification code of the folder in the classification scheme.
- Title: the title of the folder.
- Template: the name of the template, on which the folder was created.
- Status: the current status of the folder in the context of the archive.
  Status dictates whether certain actions on the folder are allowed or not.
- Significance: the significance of the folder in the context of the archive.
- Security class: the security class of the folder or document. Security class is used for hiding entities from users, that do not have access rights to the entities set by the Security clearance level.
- Current location: the current location of the folder's physical content.
- Home location: the home location of the folder's physical content.
- Number of entities: represents the number of all contained entities.



Folders

Show folders report.

Print Export

Scope:	Maintenence
Classification Code:	30
Number of folders:	7

Classification Code	Title	Template	Status	Significance	Security class	Current location	Home location	Number of subentities
30.IS-462-2021-000001	Bakterija	Folder	Opened	Vital	Top Secret			1
30-2021-000011	Razor	Folder	Opened	Retain	Top Secret			0
30-2021-000015	Kanjevec	Folder	Opened	Retain	Restricted	Z8aa	H02aaaa	0
30-IS-081	Mojstrovka	Folder	Opened	Retain	Secret	H76	K92	2
30-IS-081-00003	Mala	Folder	Opened	Retain	Secret	U82	K91	2
30-IS-328	Olševa	Folder	Opened	Permanent	Top Secret			0
30-IS-833	Stol	Folder	Opened	Retain	Restricted			1

Image 287: Example folder report

4.3.10.2 The Document report

A document report contains information about all the documents contained inside a selected archive, class or folder. The user creates it by selecting the icon or the action “Documents” in the “Report types” section.

By selecting the root of the archive or selected entity, the user defines the scope of the report. By checking of the “Recursive” parameter, the user defines that the report includes the selected entity, and all contained entities. On the contrary, by unchecking this parameter, the user limits the search to the selected entity and the first level of sub-entities.

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The report will list all documents for the user throughout the archive or under the selected entity. After selecting the action “Next”, the report is prepared.

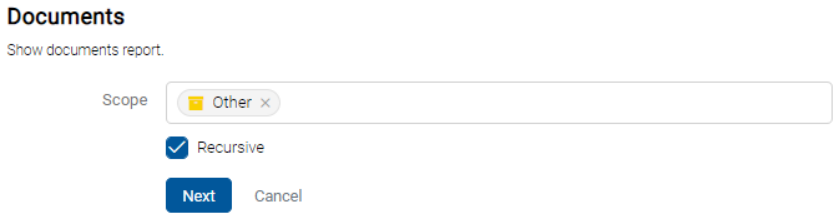

Image 288: Defining the scope of the documents report

The report header provides the following information to the user:

- Scope: the scope of the report.
- Classification code: the classification code of the selected entity in the classification scheme.
- Number of documents: the number of documents contained.
- Documents size: the total size of documents (KB/MB/GB).
- Number of errors: the total number of errors found (this field is shown if at least one error occurs).

Information about documents is listed in the following columns:

- Classification code: the classification code of the document in the classification scheme.
- Title: the title of the document.
- Template: the name of the template, on which the document was created.
- Status: the current status of the document in the context of the archive.
  Status dictates whether certain actions on the documents are allowed or not.
- Significance: the significance of the document in the context of the archive.
- Security class: the security class of the entity. It is used to hide entities from users whose security class does not provide them with access to entities.
- Current location: the current location of the document's physical content.
- Home location: the home location of the document's physical content.
- Number of contents: the total number of content(s) in the documents.
- Size: the total size of the content(s) in the document.

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Documents

Show documents report.

Print Export

Scope:	Other
Classification Code:	16
Number of documents:	6
Documents size:	817.3 kB

Classification Code	Title	Template	Status	Significance	Security class	Current location	Home location	Number of contents	Size
16/000002	Cerificate of origin	Document	Opened	Retain	Confidential			1	223.7 kB
16/000003	Follow ТП России в Абхазии, R Ray Wang (王瑞光) and Kate Gold on Twitter!	E-mail	Opened					1	45.6 kB
16/000004	Celebration	Document 01	Opened	Retain	Confidential	B41g	CnB79	3	537.0 kB
16/000005	Fwd: 複写資料ご到着しました【武蔵大学図書館】	E-mail	Opened					1	6.2 kB
16/IS-563	Contest	Document 01	Opened					0	0 B
16/IS-839	Tak for din interesse - her kan du hente dit uddrag af rapporten	E-mail	Opened					1	4.8 kB

Image 289: Example of documents report

Note: In the event of errors, an entity error notification is shown below a given entity. All errors that are created if the entity fails to open are logged.

4.3.10.3 The Contents report

The content report contains information about all the files attached to the documents inside the selected archive, class or folder. The user creates it by selecting the icon or the action "Contents" in the "Report types" section.

By selecting the root of the archive or selected entity, the user defines the scope of the report. By checking of the "Recursive" parameter, the user defines that the report includes the selected entity, and all contained entities. On the contrary, by unchecking this parameter, the user limits the search to the selected entity and the first level of sub-entities.

The report will list all content(s) in all documents for the user throughout the archive or under the selected entity. After selecting the action "Next", the report is prepared.

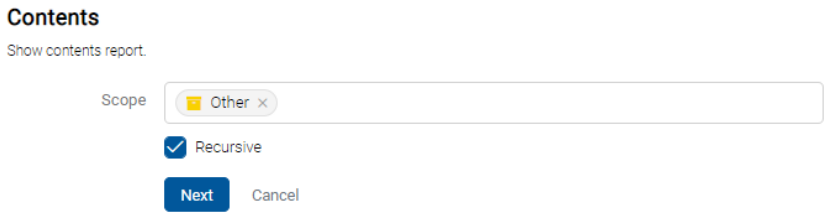


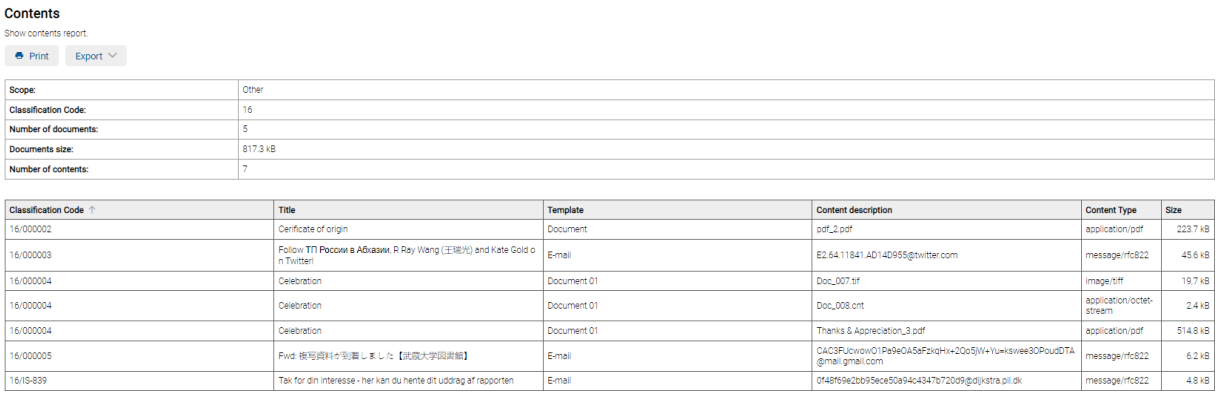
Image 290: Defining the scope of the document contents report

The report header provides the following information to the user:

- Scope: the scope of the report.
- Classification code: the classification code of the selected entity in the classification scheme.
- Number of documents: the number of documents contained.
- Documents size: the total size of documents (KB/MB/GB).
- Number of contents: the total number of content(s) in the documents.
- Number of errors: the total number of errors found (this field is shown if at least one error occurs).

Information about document contents is listed in the following columns:

- Classification code: the classification code of the document in the classification scheme.
- Title: the title of the document.
- Template: the name of the template, on which the document was created.
- Content description: a description of content (files) attached to a document.
- Content type: the types of content (files) attached to a document.
- Size: the sizes of content (files) attached to a document.



Contents

Show contents report.

Print Export

Scope:	Other
Classification Code:	16
Number of documents:	5
Documents size:	817.3 kB
Number of contents:	7

Classification Code	Title	Template	Content description	Content Type	Size
16/000002	Cerificate of origin	Document	pdf_2.pdf	application/pdf	223.7 kB
16/000003	Follow ТП России в Абхазии, R Ray Wang (王瑞光) and Kate Gold on Twitter!	E-mail	E2.64.11841.AD14D955@twitter.com	message/rfc822	45.6 kB
16/000004	Celebration	Document 01	Doc_007.tif	image/tiff	19.7 kB
16/000004	Celebration	Document 01	Doc_008.cnt	application/octet-stream	2.4 kB
16/000004	Celebration	Document 01	Thanks & Appreciation_3.pdf	application/pdf	514.8 kB
16/000005	Fwd: 複写資料ご到着しました【武蔵大学図書館】	E-mail	CAC3FUcwowO1Pa9eOA5aFzkqHv+2Oo5jW+Yu=kswee3OPoudDTA@mail.gmail.com	message/rfc822	6.2 kB
16/IS-839	Tak for din interesse - her kan du hente dit uddrag af rapporten	E-mail	0f48f59e2bb95ece50a94c4347b720d9@dijkstra.pil.dk	message/rfc822	4.8 kB

Image 291: Example of a document contents report

4.3.10.4 The Retention report

The retention report contains information on retention periods and disposition holds on all entities under the selected archive, class or folder. The user creates it by selecting the icon or the action “Retention” in the “Report types” section.

By selecting the root of the archive or selected entity, the user defines the scope of the report. By checking of the “Recursive” parameter, the user defines that the report includes the selected entity, and all contained entities. On the contrary, by unchecking this parameter, the user limits the search to the selected entity and the first level of sub-entities.

The report will list all content(s) in the all documents for the user throughout the archive or under the selected entity. After selecting the action “Next”, the report is prepared.

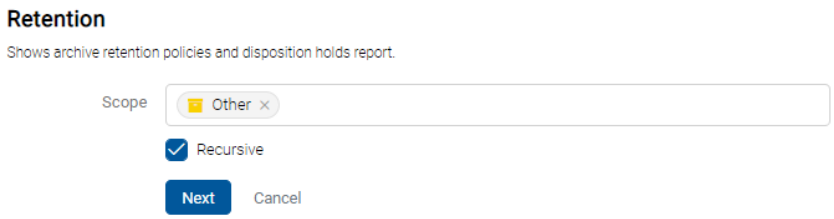


Image 292: Defining the scope of the retention report

The report header provides the following information to the user:

- Scope: the scope of the report.
- Classification code: the classification code of the selected entity in the classification scheme.
- Number of classes: the number of classes contained.
- Number of folders: the number of folders contained.
- Number of documents: the number of documents contained.

Information on retention is listed in the following columns:

- Classification code: the classification code of the entity in the classification scheme.
- Title: the title of the entity being described.
- Type: contains the type of the entity being described.
- Template: the name of the template, on which the entity was created.
- Policy: represents the type of entry (retention policy or disposition hold).
- Name: the name of the retention policy or disposition hold.
- Reason: the reason for the retention policy or disposition hold.
- Description: a description of the retention policy or disposition hold.

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Retention

Shows archive retention policies and disposition holds report.

Print Export

Scope:	Other
Classification Code:	16
Number of classes:	1
Number of folders:	1
Number of documents:	6

Classification Code	Title	Type	Template	Retention	Name	Reason	Description
16	Other	Class	Class	Retention policy	10-years	Dispose after 10 years retention	Dispose after 10 years retention
16/000002	Cerificate of origin	Document	Document	Retention policy	10-years	Dispose after 10 years retention	Dispose after 10 years retention
16/000002	Cerificate of origin	Document	Document	Retention policy	1-year	Dispose after 1 year retention	Dispose after 1 year retention
16/000002	Cerificate of origin	Document	Document	Retention policy	5-years	Dispose after 5 years retention	Dispose after 5 years retention
16/000003	Follow ТП России в Абхазии, P Ray Wang (王瑞光) and Kate Gold on Twitter!	Document	E-mail	Retention policy	10-years	Dispose after 10 years retention	Dispose after 10 years retention
16/000004	Celebration	Document	Document 01	Retention policy	10-years	Dispose after 10 years retention	Dispose after 10 years retention
16/000004	Celebration	Document	Document 01	Retention policy	1-year	Dispose after 1 year retention	Dispose after 1 year retention
16/000004	Celebration	Document	Document 01	Retention policy	5-years	Dispose after 5 years retention	Dispose after 5 years retention
16/000004	Celebration	Document	Document 01	Retention policy	2-years	Dispose after 2 years retention	Dispose after 2 years retention
16/000004	Celebration	Document	Document 01	Retention policy	Permanent	Permanent retention	
16/000005	Fwd: 複写資料が到着しました【武蔵大学図書館】	Document	E-mail	Retention policy	10-years	Dispose after 10 years retention	Dispose after 10 years retention
16/IS-563	Contest	Document	Document 01	Retention policy	10-years	Dispose after 10 years retention	Dispose after 10 years retention
16/IS-839	Tak for din interesse - her kan du hente dit uddrag af rapporten	Document	E-mail	Retention policy	10-years	Dispose after 10 years retention	Dispose after 10 years retention
16-2021-000001	Events	Folder	Folder	Retention policy	10-years	Dispose after 10 years retention	Dispose after 10 years retention
16-2021-000001	Events	Folder	Folder	Retention policy	5-years	Dispose after 5 years retention	Dispose after 5 years retention

Image 293: Example of a review report

4.3.10.5 The Review report

The review report contains information on reviews. The user creates it by selecting the icon or the action “Review” in the “Report types” section.

By selecting the review, the user defines the scope of the report.

By checking of the “Recursive” parameter, the user defines that the report includes the selected entity, and all contained entities. On the contrary, by unchecking this parameter, the user limits the search to the selected entity and the first level of sub-entities.

The report will list all reviews for the user throughout the archive or under the selected entity. After selecting the action “Next”, the report is prepared.

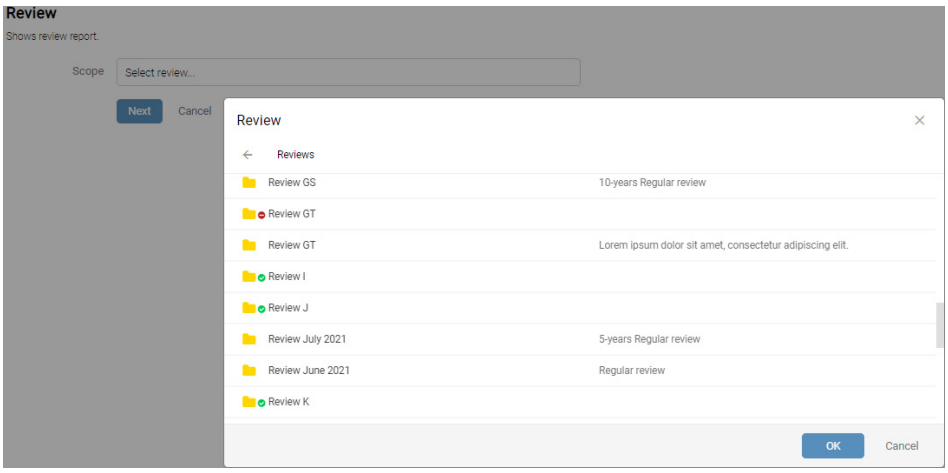

Image 294: Selecting the review

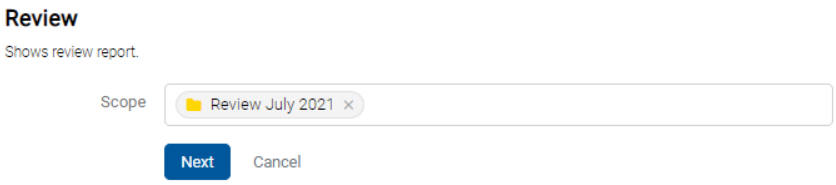

Image 295: Defining the scope of the review report

The report header provides the following information to the user:

- Review: the title of the review.
- Entities: the number of entities in the selected review.

Information on reviews are listed in the following sections and columns:

The Details section

- Property: the review properties.
- Value: the value of the review properties.

Details

Property	Value
Title	Review AD
Scope	Administration
Scope Classification Code	3
Description	2-years Regular
Status	Closed
Owner	John Smith (jsmith [DELETED 20005])
Creator	Administrator (admin)

Image 296: Example of a Review report - Properties

The Retention policy section

- Title: the name of the retention policy.
- Reason: the reason for the retention policy.
- Description: a description of the retention policy.

Retention policy

Name	Reason	Description
2-years	Dispose after 2 years retention	Dispose after 2 years retention

Image 297: Example of a Review report – Retention policy

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The Entities section

- Classification code: the classification code of the entity in the classification scheme.
- Title: the title of the entity being described.
- Type: contains the type of the entity being described.
- Action: an action on the entity.
- Reason: the reason for performing the action on the entity.
- Comment: the comment of the entity.
- Transferred: this parameter means the entity was transferred.
- Transfer identifier: a reference to the transferred entity.
- Identifier: the identifier of the review.

Entities

Classification Code	Title	Type	Action	Reason	Comment	Transferred	Transfer Identifier	Identifier
3.8	Agreements and Terms & Conditions	Class	Review	Retention policy conflict. No default reason available.		No		
3.8.0	Finance	Class	Review	Retention policy conflict. No default reason available.		No		
3.8.0.0	Accounts Payable	Class	Review	Retention policy conflict. No default reason available.		No		

Image 298: Example of a retention report - Entities

The Report section

- Property: the review properties.
- Value: the value of the review properties.
- XML review execute report: an XML report on the review.
- Textual review execute report: a textual report on the review.

Review execute report

Property	Value
Title	Review execute report
Description	
Created	1. Apr 2020, 11:00
Modified	1. Apr 2020, 11:00

Review execute report

<Report><Header Version="1"><Action Id="A0">Dispose</Action><Action Id="A1">Permanent</Action><Action Id="A2">Transfer</Action><Action Id="A3">Review</Action></Header><Entity Id="C=3°F=2020-000001" IdType="C" Action="A3" Error="true"><Message>Processing aborted due to reason that entity is marked as already reviewed.</Message></Entity><Entity Id="C=3°F=2020-000002" IdType="C" Action="A3" /><Entity Id="C=3°C=8" IdType="C" Action="A3" /><Entity Id="C=3°C=8°C=0" IdType="C" Action="A3" /><Entity Id="C=3°C=8°C=0°C=0" IdType="C" Action="A3" /><Entity Id="C=3°C=8°C=0°C=0°C=1" IdType="C" Action="A3" /><Entity Id="C=3°C=8°C=0°C=1" IdType="C" Action="A3" /><Entity Id="C=3°C=8°C=0°C=1°C=0" IdType="C" Action="A3" /><Entity Id="C=3°C=8°C=0°C=1°C=1" IdType="C" Action="A3" /><Entity Id="C=3°C=8°C=0°C=2" IdType="C" Action="A3" /><Entity Id="C=3°C=8°C=0°C=2°C=0" IdType="C" Action="A3" /><Entity Id="C=3°C=8°C=0°C=2°C=1" IdType="C" Action="A3" /><Entity Id="C=3°C=8°C=0°C=2°C=1°C=0" IdType="C" Action="A3" /><Entity Id="C=3°C=8°C=0°C=2°C=2" IdType="C" Action="A3" /><Entity Id="C=3°C=8°C=0°C=3" IdType="C" Action="A3" /><Entity Id="C=3°C=8°C=0°C=3°C=0" IdType="C" Action="A3" /><Entity Id="C=3°C=8°C=0°C=3°C=1" IdType="C" Action="A3" /><Entity Id="C=3°C=8°C=0°C=3°C=2" IdType="C" Action="A3" /><Entity Id="C=3°C=8°C=0°C=3°C=3" IdType="C" Action="A3" /><Entity Id="C=3°C=8°C=0°C=4" IdType="C" Action="A3" /><Entity Id="C=3°C=8°C=0°C=4°C=0" IdType="C" Action="A3" /><Entity Id="C=3°C=8°C=0°C=4°C=1" IdType="C" Action="A3" /><Entity Id="C=3°D=000016" IdType="C" Action="A3" /><Entity Id="C=3°D=000019" IdType="C" Action="A3" /><Entity Id="C=3°D=000020" IdType="C" Action="A3" /><Entity Id="C=3°D=000024" IdType="C" Action="A3" /><Entity Id="C=3°D=000026" IdType="C" Action="A3" /></Report>

Textual review execute report

2020-04-01T09:00:24.270Z Review action 'Review' on entity 'C=3°F=2020-000001' (id type 'ClassificationCode') FAILED to execute. Reason: Processing aborted due to reason that entity is marked as already reviewed.
2020-04-01T09:00:24.275Z Review action 'Review' on entity 'C=3°F=2020-000002' (id type 'ClassificationCode') executed.
2020-04-01T09:00:24.270Z Review action 'Review' on entity 'C=3°F=2020-000002'D=000001' (id type 'ClassificationCode') executed.
2020-04-01T09:00:24.338Z Review action 'Review' on entity 'C=3°C=8' (id type 'ClassificationCode') executed.
2020-04-01T09:00:24.336Z Review action 'Review' on entity 'C=3°C=8°C=0' (id type 'ClassificationCode') executed.
2020-04-01T09:00:24.285Z Review action 'Review' on entity 'C=3°C=8°C=0' (id type 'ClassificationCode') executed.
2020-04-01T09:00:24.279Z Review action 'Review' on entity 'C=3°C=8°C=0°C=0°C=0' (id type 'ClassificationCode') executed.
2020-04-01T09:00:24.282Z Review action 'Review' on entity 'C=3°C=8°C=0°C=0°C=1' (id type 'ClassificationCode') executed.
2020-04-01T09:00:24.294Z Review action 'Review' on entity 'C=3°C=8°C=0°C=1' (id type 'ClassificationCode') executed.
2020-04-01T09:00:24.288Z Review action 'Review' on entity 'C=3°C=8°C=0°C=1°C=0' (id type 'ClassificationCode') executed.
2020-04-01T09:00:24.291Z Review action 'Review' on entity 'C=3°C=8°C=0°C=1°C=1' (id type 'ClassificationCode') executed.

Image 299: Example of a retention report - Repot

4.3.10.6 The Access report

The access report contains information about the access rights / permissions of users on all the folders and documents inside a selected archive, class or folder, to which the archive users have access. The user creates it by selecting the icon or the action “Access” in the “Report types” section.

By selecting the archive's root or selected entity, the user defines the scope of the report.
By checking of the “Recursive” parameter, the user defines that the report includes the selected entity, and all contained entities. On the contrary, by unchecking this parameter, the user limits the search to the selected entity and the first level of sub-entities.

Select the “User” from the list.
If you wish to create an entity access report on all the users of the archive, leave the field with the label “All users” blank. Otherwise, select one or more users from the list (“Select user”).
The report will list all access rights for the user throughout the archive or under the selected entity. After selecting the action “Next”, the report is prepared.

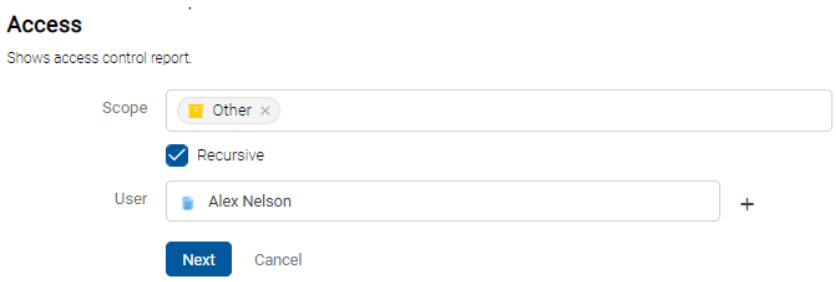

Image 300: Defining the scope of the access report

The report header provides the following information to the user:

- Scope: the scope of the report.
- Classification code: the classification code of the selected entity in the classification scheme.
- Number of classes: the number of classes contained.
- Number of folders: the number of folders contained.
- Number of documents: the number of documents contained.

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Information on the users' rights on individual folders and documents is listed in the following columns:

- Classification code: the classification code of the entity in the classification scheme.
- Title: the title of the entity.
- Type: the type of the entity being described.
- Template: the name of the template, on which the document was created.
- Status: the status of the entity in the context of the archive.
  Status dictates whether certain actions on the document are allowed or not.
- Significance: the significance of the entity in the context of the archive.
- Security class: the security class of the entity. Security classes are used to hide entities from users whose clearance level is not high enough to access them.
- Current location: the current location of the entity's physical content.
- Home location: the home location of the entity's physical content.
- User: the name of the user the report is on.
- Read: this value tells if the user has access right to read entities.
- Write: this value tells if the user has access right to edit entities.
- Delete: this value tells if the user has access right to delete entities.
- Move: this value tells if the user has access right to move entities.
- Create entities: this value tells if the user has access right to create entities.
- Change permissions: this value tells if the user has access right to change permissions.
- Change security class: this value tells if the user has access right to change security class.
- Change status: this value tells if the user has access right to change status.
- Change retention: this value tells if the user has access right to change retention.
- Create references: this value tells if the user has access right to create a reference to another reference.

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Access

Shows access control report.

Print Export

Scope:	Other
Classification Code:	16
Number of classes:	1
Number of folders:	1
Number of documents:	6

Classification Code	Title	Type	Template	Status	Significance	Security class	Current location	Home location	User	Read	Write	Delete	Move	Create entities	Change permissions	Change security class	Change status	Change retention	Create references
16	Other	Class	Class	Opened					Alex Nelson (anelson)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
16/000002	Cerificate of origin	Document	Document	Opened	Retain	Confidential			Alex Nelson (anelson)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
16/000003	Follow TTI Pocom s ADxas ии, R Ray Weng (王瑞光) and Kate Gold on Twitter!	Document	E-mail	Opened					Alex Nelson (anelson)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
16/000004	Celebration	Document	Document 01	Opened	Retain	Confidential	B41g	CnB79	Alex Nelson (anelson)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
16/000005	Fwd: 検索資料が到着しました【武蔵大学図書館】	Document	E-mail	Opened					Alex Nelson (anelson)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
16/IS-563	Contest	Document	Document 01	Opened					Alex Nelson (anelson)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
16/IS-839	Tak for din interesse - her kan du hente dit uddrag af rapporten	Document	E-mail	Opened					Alex Nelson (anelson)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
16-2021-000001	Events	Folder	Folder	Opened	Retain	Confidential	U82	K91	Alex Nelson (anelson)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Image 301: Example access report on the selected user

4.3.10.7 The Classification scheme report

A classification scheme report contains information about all the classes inside the selected archive or class. The user creates it by selecting the icon or the action “Classification scheme” or “Classification scheme with folders” in the “Classification scheme” section.

Classes in the classification scheme

By selecting the archive's root or selected entity, the user defines the scope of the report. The report will list all classes for the user throughout the archive or under the selected entity. After selecting the action “Next”, the report is prepared.

Image 302: Defining the scope of the classes in the classification scheme report

The report header provides the following information to the user:

- Scope: the scope of the report.
- Classification code: the classification code of the selected entity in the classification scheme.
- Number of classes: the number of classes contained.

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Information on individual classes are listed in the following columns:

- Classification code: the classification code of the class in the classification scheme.
- Title: the title of the class being described.
- Created: the date the entity was created on the server.

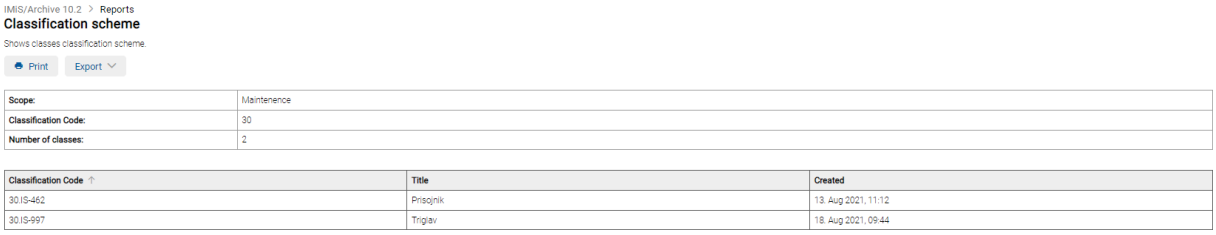

Image 303: Example of a classification scheme report on the classes

Classes and folders in the classification scheme

By selecting the archive's root or selected entity, the user defines the scope of the report. The report will list all classes and folders for the user throughout the archive or under the selected entity. After selecting the action “Next”, the report is prepared.

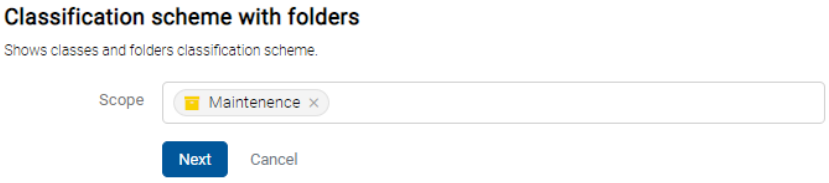

Image 304: Defining the scope of the classes and folders in the classification scheme report

The report header provides the following information to the user:

- Scope: the scope of the report.
- Classification code: the classification code of the selected entity in the classification scheme.
- Number of classes: the number of classes contained.
- Number of folders: the number of folders contained.

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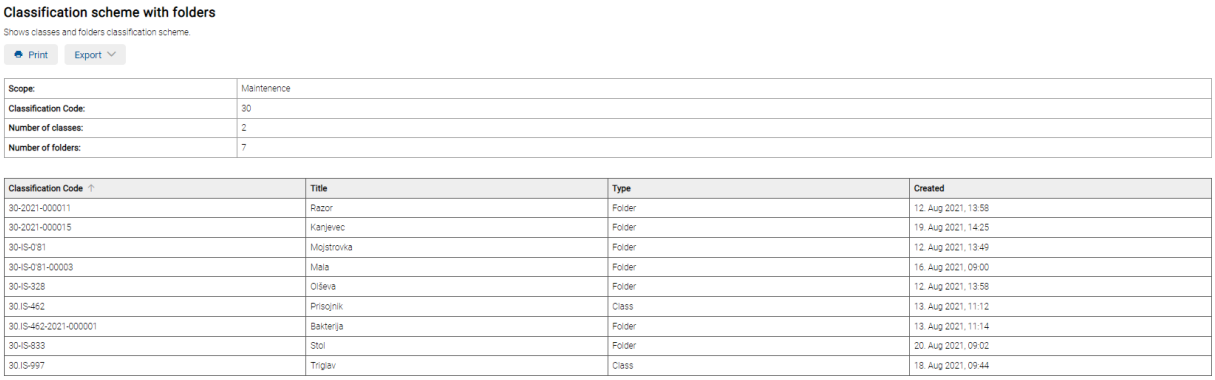
Information on individual classes and folders are listed in the following columns:

- Classification code: the classification code of the class or folder in the classification scheme.
- Title: the title of the class or folder being described.
- Type: the type of the entity being described.
- Created: the date the entity was created on the server.



Classification scheme with folders

Shows classes and folders classification scheme.

Print Export

Scope:	Maintenence
Classification Code:	30
Number of classes:	2
Number of folders:	7

Classification Code	Title	Type	Created
30-2021-000011	Razor	Folder	12. Aug 2021, 13:58
30-2021-000015	Kanjevec	Folder	19. Aug 2021, 14:25
30-IS-081	Mojstrovka	Folder	12. Aug 2021, 13:49
30-IS-081-00003	Mala	Folder	16. Aug 2021, 09:00
30-IS-328	Olševa	Folder	12. Aug 2021, 13:58
30.IS-462	Prisojnik	Class	13. Aug 2021, 11:12
30.IS-462-2021-000001	Bakterija	Folder	13. Aug 2021, 11:14
30-IS-833	Stol	Folder	20. Aug 2021, 09:02
30.IS-997	Triglav	Class	18. Aug 2021, 09:44

Image 305: Example of a classification scheme report on the classes and folders

4.3.10.8 The Entity report

The entity report contains selected entity data. The user creates it by selecting the icon or the action “Entity details” in the “Other” section.

By selecting the entity, the user defines the scope of the report.
The user can limit the displayed data set with the settings of the following fields and/or parameters:

- Version: entity version.
- Content: content of documents or emails.
- Security: collection of access permissions for directory entities and entity properties.
- Physical content: metadata and location of the physical content.
  For more information on physical content see chapter Physical content.
- Email: email information. Available only for documents created using the template “Email”.
  For more information see chapter Email.
- Retention: information on retention periods and disposition holds.
  For more information see chapter Retention.

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- Save log: information on checking the validity of electronic signatures and digital certificates upon capture. For more information see chapter Save log.
- Transfer metadata: information on the transfer of physical content (and the audit log).
- Custom metadata: additional metadata shown based on the type of template.
  For more information see chapter Custom metadata.

After selecting the action “Next”, the report is prepared.

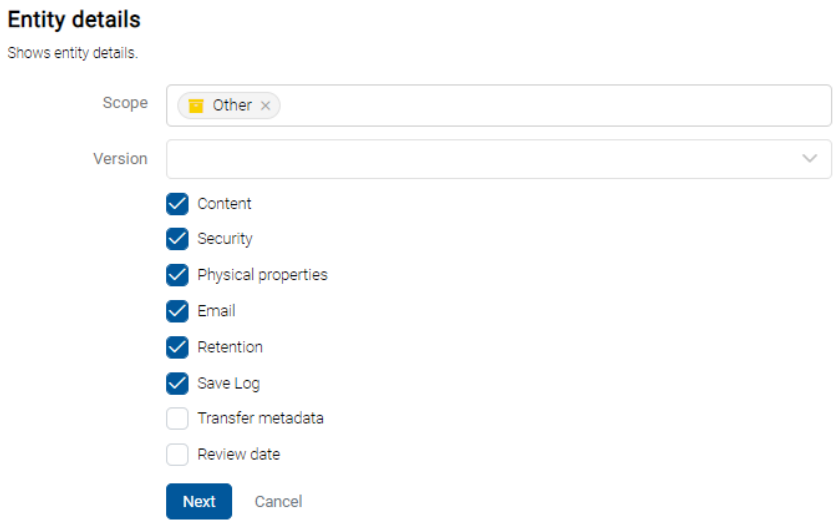

Image 306: Defining the scope of the entity report

Information on entity are listed in the following columns:

- Classification code: the classification code of the entity in the classification scheme.
- Template: the name of the template.
- Status: the current status of the entity.
- Significance: the significance of the entity.
- Security class: the security class of the entity.
- Current location: the current location of the document's physical content.
- Home location: the home location of the document's physical content.
- Number of contents: the total number of content(s) in the documents.
- Size: sizes of content (files) attached to a document.

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Entity details

Shows entity details.

Print

Other

Property	Type	Value
Classification Code	STRING200	16
Title	STRING200	Other
Description	STRING200	
Permanent	BOOL	No
Status	UINT32	Opened
Opened	DATE_TIME	2. Jun 2020, 16:39
Closed	DATE_TIME	
Security class	UINT32	
Significance	UINT32	
Owner	DIRECTORY_ENTITY	Alex Nelson (anelson)
Creator	DIRECTORY_ENTITY	Administrator (admin)
Keywords	STRING30	
Template	STRING200	Class
Type	STRING10	
Created	DATE_TIME	2. Jun 2020, 16:39
Modified	DATE_TIME	27. Sep 2020, 20:29
Accessed	DATE_TIME	8. Sep 2021, 14:01
Identifier	STRING100	4s-K2adKg-SjYFERx-m18oM6T5In9204
External Identifiers	STRING100 [ ]	
Parent	STRING200	
Review Trigger	DATE_TIME	1. Sep 2009, 20:25

Image 307: Example of the Entities report – Properties

Retention

Name	Reason	Description
10-years	Dispose after 10 years retention	Dispose after 10 years retention
5-years	Dispose after 5 years retention	Dispose after 5 years retention
2-years	Dispose after 2 years retention	Dispose after 2 years retention

Disposition holds

Name	Reason	Description
Legacy procedure	Active legal procedure	Legal pocedure in progress, material must be preserved until finished

Image 308: Example of the Entities report –Retention

Security

Name	Type	Permission	Read	Write	Delete	Move	Create entites	Change permissions	Change security class	Change status	Change retention	Create references	Valid from	Valid to
anelson	USER	Allow	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
anelson	USER	Allow, Inherited	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Anonymous	USER	Allow, Inherited	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
board [DELETED 10004]	GROUP	Allow, Inherited	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
sys:Everyone	GROUP	Allow	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
sys:Everyone	GROUP	Allow, Inherited										✓		
glayton	USER	Allow, Inherited	✓	✓	✓	✓	✓	✓	✓		✓	✓		
jturner	USER	Allow, Inherited	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
jsmith [DELETED 20005]	USER	Allow, Inherited	✓	✓										
kclay	USER	Allow, Inherited	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
marko	USER	Allow, Inherited	✓	✓	✓									
sys:Owner	ATTRIBUTE	Allow	✓	✓			✓	✓						
sys:Owner	ATTRIBUTE	Allow, Inherited	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
sys:Administrators	GROUP	Allow, Inherited	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		

Security / DateTime

Name	Type	Permission	Read	Write	Create	Delete	Valid from	Valid to
glayton	USER	Allow, Inherited	✓	✓	✓	✓		

Security / evaluation

Name	Type	Permission	Read	Write	Create	Delete	Valid from	Valid to
jturner	USER	Allow, Inherited	✓	✓	✓	✓		

Image 309: Example of the Entities report – Security

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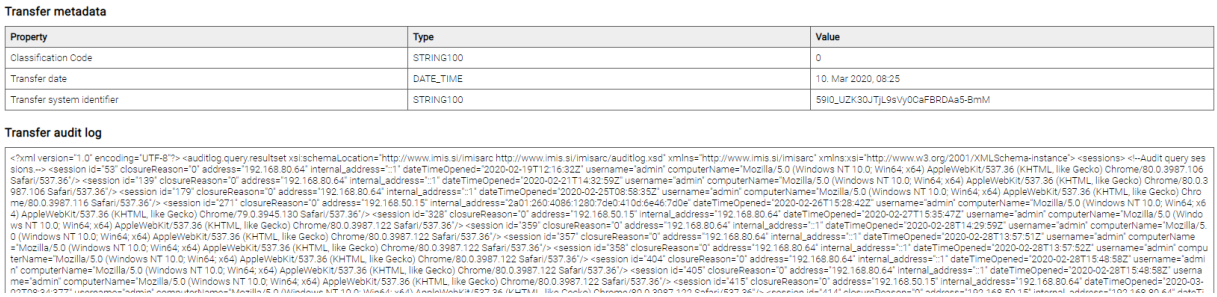

Transfer metadata

Property	Type	Value
Classification Code	STRING100	0
Transfer date	DATE_TIME	10. Mar 2020, 08:25
Transfer system identifier	STRING100	59I0_UZK30JTjL9sVy0CaFBRDAa5-BmM

Transfer audit log

<?xml version="1.0" encoding="UTF-8"?> <auditlog.query.resultset xsi:schemaLocation="http://www.imis.si/imisarc http://www.imis.si/imisarc/auditlog.xsd" xmlns="http://www.imis.si/imisarc" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"> <sessions> <!--Audit query sessions.--> <session id="53" closureReason="0" address="192.168.80.64" internal_address="::1" dateTimeOpened="2020-02-19T12:16:32Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/80.0.3987.106 Safari/537.36"/> <session id="139" closureReason="0" address="192.168.80.64" internal_address="::1" dateTimeOpened="2020-02-21T14:32:59Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/80.0.3987.106 Safari/537.36"/> <session id="179" closureReason="0" address="192.168.80.64" internal_address="::1" dateTimeOpened="2020-02-25T08:58:35Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/80.0.3987.116 Safari/537.36"/> <session id="271" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1280:7de0:410d:6e46:7d0e" dateTimeOpened="2020-02-26T15:28:42Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/79.0.3945.130 Safari/537.36"/> <session id="328" closureReason="0" address="192.168.50.15" internal_address="192.168.80.64" dateTimeOpened="2020-02-27T15:35:47Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/80.0.3987.122 Safari/537.36"/> <session id="359" closureReason="0" address="192.168.80.64" internal_address="::1" dateTimeOpened="2020-02-28T14:29:59Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/80.0.3987.122 Safari/537.36"/> <session id="357" closureReason="0" address="192.168.80.64" internal_address="::1" dateTimeOpened="2020-02-28T13:57:51Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/80.0.3987.122 Safari/537.36"/> <session id="358" closureReason="0" address="192.168.80.64" internal_address="::1" dateTimeOpened="2020-02-28T13:57:52Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/80.0.3987.122 Safari/537.36"/> <session id="404" closureReason="0" address="192.168.80.64" internal_address="::1" dateTimeOpened="2020-02-28T15:48:58Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/80.0.3987.122 Safari/537.36"/> <session id="405" closureReason="0" address="192.168.80.64" internal_address="::1" dateTimeOpened="2020-02-28T15:48:58Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/80.0.3987.122 Safari/537.36"/> <session id="415" closureReason="0" address="192.168.50.15" internal_address="192.168.80.64" dateTimeOpened="2020-03-

Image 310: Example of the Entities report – Transfer metadata

4.3.10.9 The Deleted entities report

The deleted entities report contains information on entities deleted throughout the archive.

The user creates it by selecting the icon or the action “Deleted” in the “Other” section.

After selecting the action “Next”, the report is prepared.

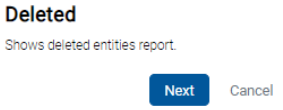

Image 311: Decision before preparing the report

The report header provides the following information to the user:

- Scope: the scope of the report.
- Size: the number of all deleted entities.
- Number of classes: the number of classes contained.
- Number of folders: the number of folders contained.
- Number of Documents: the number of documents contained.

Information on entity are listed in the following columns:

- Classification code: the classification code of the deleted entity in the classification scheme.
- Title: The title of the deleted entity being described.
- Type: the type of the deleted entity being described.
- Description: a short description of the deleted entity.
- Agent: the user who executed the delete action.
- Deleted: the date and time of deleting the entity from the archive server.

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Deleted

Shows deleted entities report.

Print Export

Scope:	IMiS/Archive 10.2
Size:	843
Number of classes:	252
Number of folders:	41
Number of documents:	550

Classification Code	Title	Type	Description	Agent	Deleted
0	Administration	Class	.	Administrator (admin)	10. Mar 2020, 10:31
0.10	Class 5	Class	.	Administrator (admin)	10. Mar 2020, 10:15
0.11	Class 6	Class	.	Administrator (admin)	10. Mar 2020, 10:15
0.12	Class 7	Class	.	Administrator (admin)	10. Mar 2020, 10:15
0.16	Categories	Class	.	Administrator (admin)	10. Mar 2020, 10:31
0.16.6	Class 1	Class	.	Administrator (admin)	10. Mar 2020, 10:30
0.16/000001	1	Document	.	Administrator (admin)	10. Mar 2020, 10:30
0.16/000002	2	Document	.	Administrator (admin)	10. Mar 2020, 10:30

Image 312: Example of the Deleted entities report

By selecting the action “Print”, the user is shown a print preview for the deleted entities report. The user prints the report by selecting the action “Print” or cancels it by selecting the action “Cancel”.

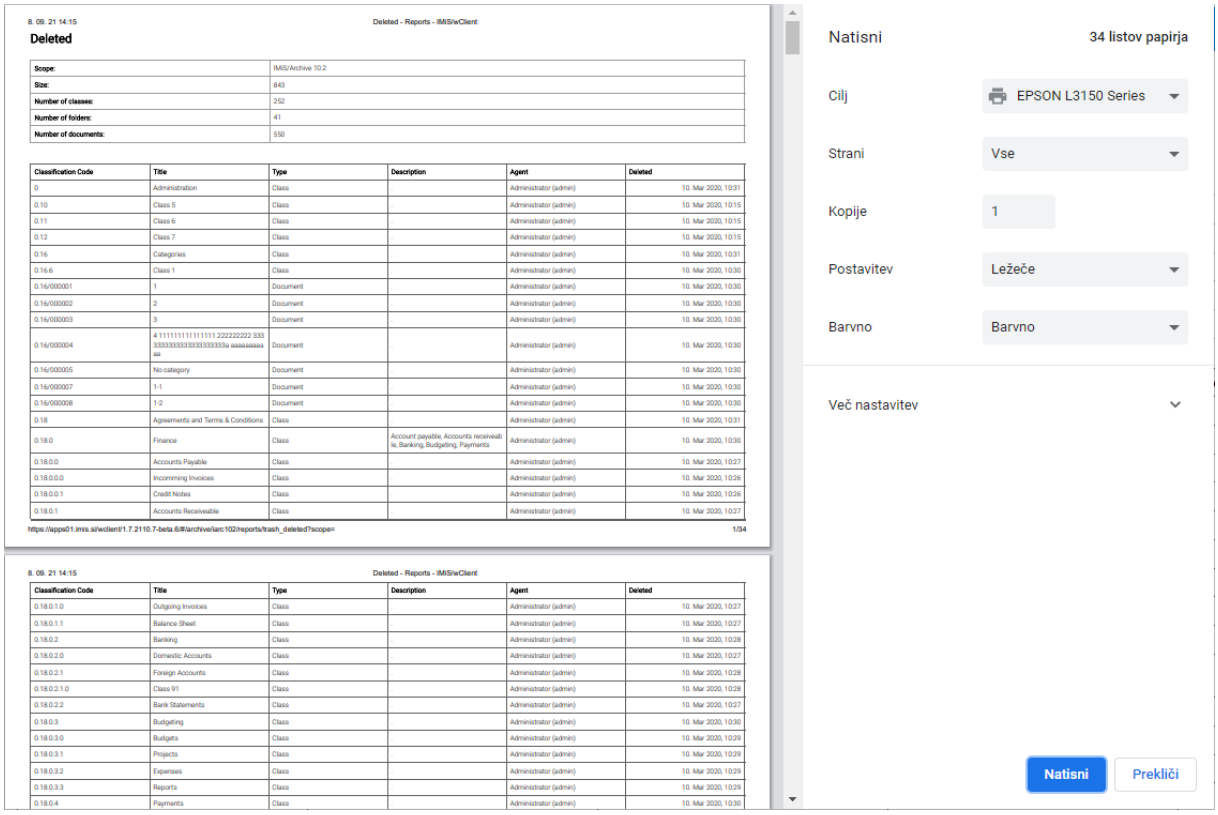
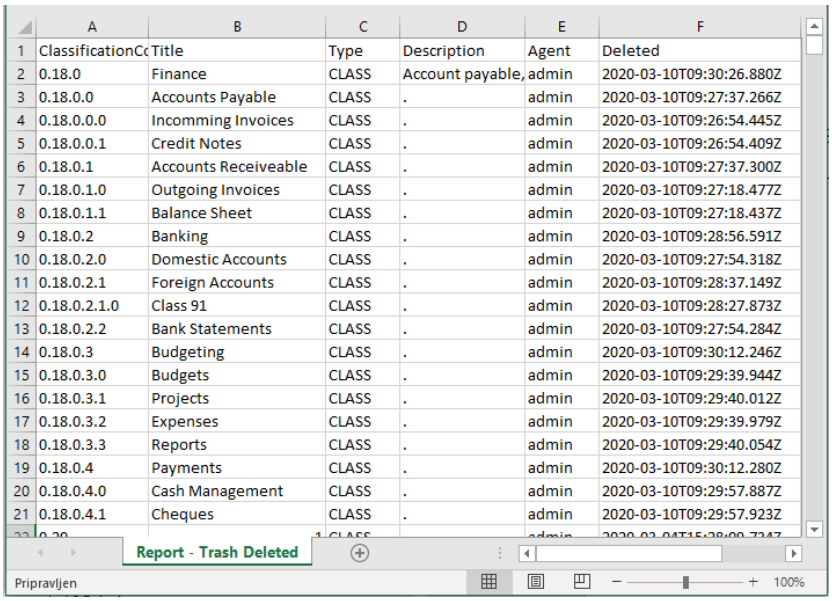


Image 313: A print preview for the deleted entities report

By selecting the action “Export”, a popup menu appears with the possible format (CSV) for saving data on deleted entities. After selecting the CSV format, the deleted entities report opens for the user.



	A	B	C	D	E	F
1	ClassificationCo	Title	Type	Description	Agent	Deleted
2	0.18.0	Finance	CLASS	Account payable,	admin	2020-03-10T09:30:26.880Z
3	0.18.0.0	Accounts Payable	CLASS	.	admin	2020-03-10T09:27:37.266Z
4	0.18.0.0.0	Incomming Invoices	CLASS	.	admin	2020-03-10T09:26:54.445Z
5	0.18.0.0.1	Credit Notes	CLASS	.	admin	2020-03-10T09:26:54.409Z
6	0.18.0.1	Accounts Receiveable	CLASS	.	admin	2020-03-10T09:27:37.300Z
7	0.18.0.1.0	Outgoing Invoices	CLASS	.	admin	2020-03-10T09:27:18.477Z
8	0.18.0.1.1	Balance Sheet	CLASS	.	admin	2020-03-10T09:27:18.437Z
9	0.18.0.2	Banking	CLASS	.	admin	2020-03-10T09:28:56.591Z
10	0.18.0.2.0	Domestic Accounts	CLASS	.	admin	2020-03-10T09:27:54.318Z
11	0.18.0.2.1	Foreign Accounts	CLASS	.	admin	2020-03-10T09:28:37.149Z
12	0.18.0.2.1.0	Class 91	CLASS	.	admin	2020-03-10T09:28:27.873Z
13	0.18.0.2.2	Bank Statements	CLASS	.	admin	2020-03-10T09:27:54.284Z
14	0.18.0.3	Budgeting	CLASS	.	admin	2020-03-10T09:30:12.246Z
15	0.18.0.3.0	Budgets	CLASS	.	admin	2020-03-10T09:29:39.944Z
16	0.18.0.3.1	Projects	CLASS	.	admin	2020-03-10T09:29:40.012Z
17	0.18.0.3.2	Expenses	CLASS	.	admin	2020-03-10T09:29:39.979Z
18	0.18.0.3.3	Reports	CLASS	.	admin	2020-03-10T09:29:40.054Z
19	0.18.0.4	Payments	CLASS	.	admin	2020-03-10T09:30:12.280Z
20	0.18.0.4.0	Cash Management	CLASS	.	admin	2020-03-10T09:29:57.887Z
21	0.18.0.4.1	Cheques	CLASS	.	admin	2020-03-10T09:29:57.923Z

Report - Trash Deleted

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Image 314: Review of information on deleted entities in the CSV format

4.3.10.10 The Delete queue report

The delete queue report contains information on entities placed on the delete queue list.

The user creates it by selecting the icon or the action “Queue” in the “Other” section.

After selecting the action “Next”, the report is prepared.

By selecting the root of the archive (leaving the field blank) or selected entity, the user defines the scope of the report.

By checking of the “Recursive” parameter, the user defines that the report includes the selected entity, and all contained entities. On the contrary, by unchecking this parameter, the user limits the search to the selected entity and the first level of sub-entities.

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After selecting the action “Next”, the report is prepared.

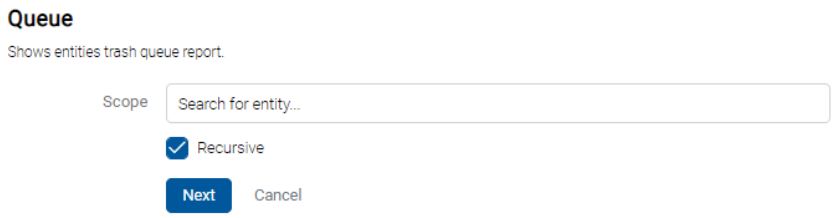

Image 315: Defining the scope of the delete queue report

The report header provides the following information to the user:

- Scope: the scope of the report.
- Classification code: the classification code of the selected entity in the classification scheme.
- Number of classes: the number of classes contained.
- Number of folders: the number of folders contained.
- Number of documents: the number of documents contained.

Information on the entities waiting for deletion are listed in the following columns:

- Classification code: the classification code of the class in the classification scheme.
- Type: the type of the entity being described.
- Template: the name of the template used to create the entity.
- Status: the status of the entity in the context of the archive owner.
- Security class: the security class of the entity. It is used to hide entities from users whose security class does not provide them with access to entities.
- Creator: the user who created the entity; meaning the user who was logged in during the session when the entity was created. This metadata never changes throughout the entity’s existence.
- Owner: a directory entity (user or group) entity that is responsible for the selected entity (owner).

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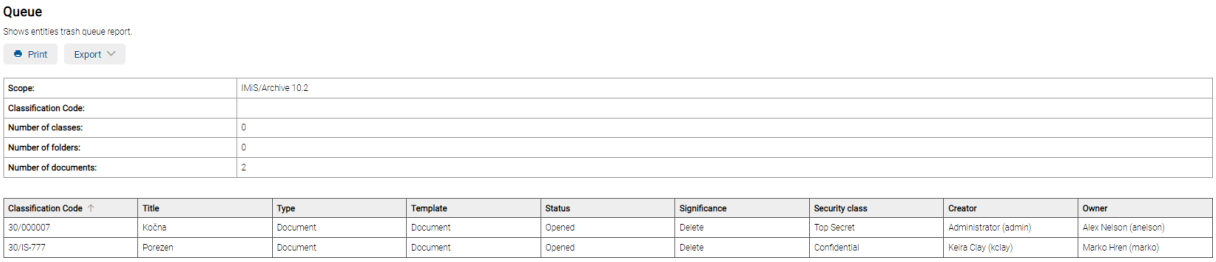

Queue

Shows entities trash queue report.

Print Export

Scope:	IMiS/Archive 10.2
Classification Code:	
Number of classes:	0
Number of folders:	0
Number of documents:	2

Classification Code	Title	Type	Template	Status	Significance	Security class	Creator	Owner
30/000007	Kočna	Document	Document	Opened	Delete	Top Secret	Administrator (admin)	Alex Nelson (anelson)
30/IS-777	Porezen	Document	Document	Opened	Delete	Confidential	Keira Clay (kclay)	Marko Hren (marko)

Image 316: Example of the delete queue report

By selecting the action “Print”, the user is shown a print preview for the deleted entities report. The user prints the report by selecting the action “Print” or cancels it by selecting the action “Cancel”.

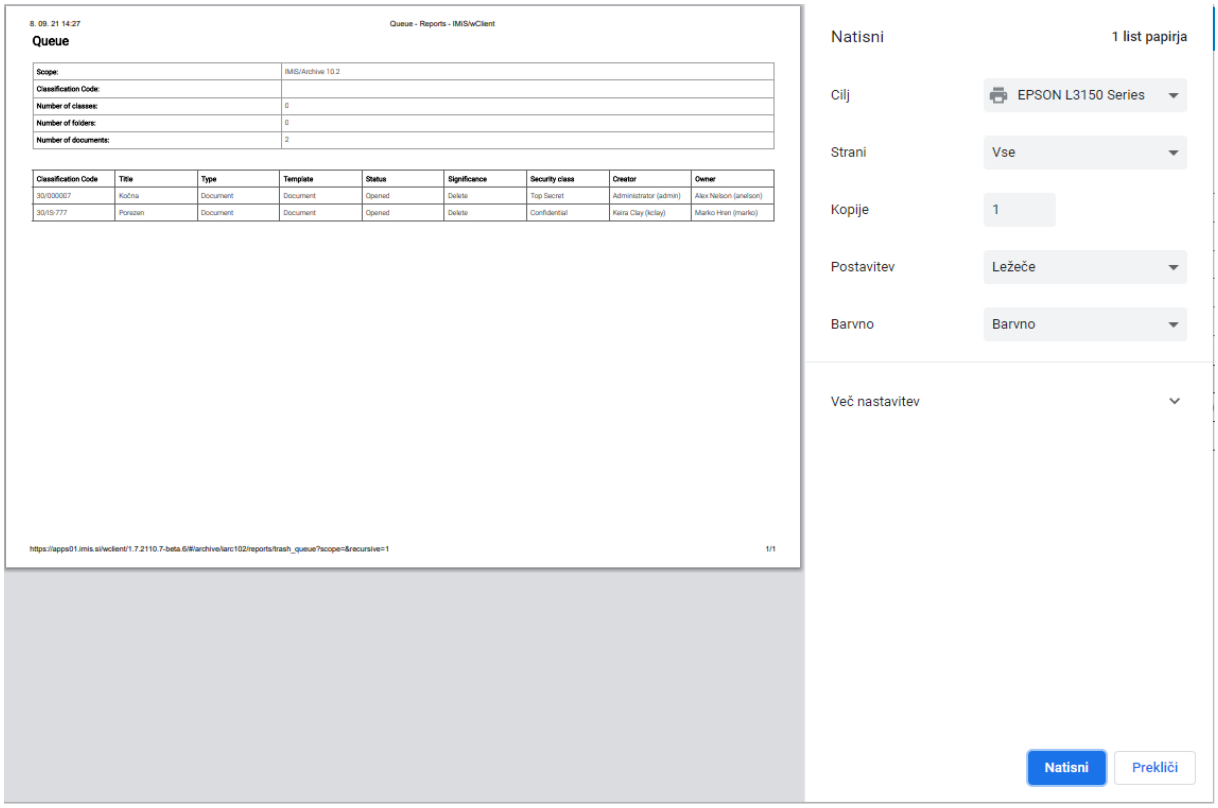

Image 317: A print preview for the delete queue report

By selecting the action “Export”, a popup menu appears with the possible format (CSV) for saving data on the entities waiting for deletion. After selecting the CSV format, the deletion queue report opens for the user.

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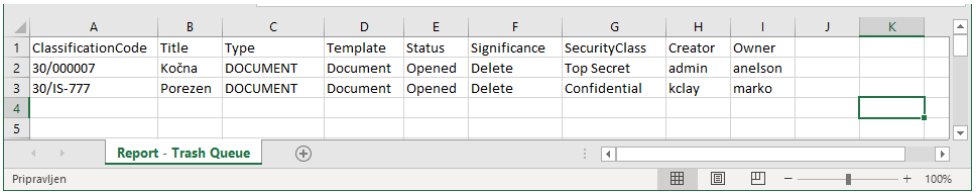
After selecting the action “Open”, the information on the entities waiting for deletion is shown.



	A	B	C	D	E	F	G	H	I	J	K
1	ClassificationCode	Title	Type	Template	Status	Significance	SecurityClass	Creator	Owner		
2	30/000007	Kočna	DOCUMENT	Document	Opened	Delete	Top Secret	admin	anelson		
3	30/IS-777	Porezen	DOCUMENT	Document	Opened	Delete	Confidential	kclay	marko		
4											
5											

Report - Trash Queue

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Image 318: Review of information on entities waiting for deletion in the CSV format

4.3.11 Bulk document capture

Bulk capture is the action of importing a large number of documents without the need for the user to oversee each individual capturing procedure. Bulk capture in the IMiS®/wClient is performed using the “Import” action. By preparing the content correctly before you import it, you can decrease the possibility of encountering errors during the bulk capture procedure. Entities that experience errors during bulk capture are not imported and must be captured manually by the user. For more information on the bulk capture procedure see chapter Import.

4.3.12 Import

The IMiS®/wClient enables the import of entities to the IMiS®/ARChive Server together with their metadata on Audit log and Authenticity evidence if they exist. The entities imported by a user with the ImportExport role have to be compressed (.zip) and prepared in the prescribed XML format.

For more information on roles see chapter Access in the IMiS®/ARChive Server Manual.

Import may be performed into the root class of the classification scheme or into any chosen class or folder. After selecting the action »Import« in the Actions dropdown menu in the command bar or on a given entity, a window opens for selecting the compressed file for entity import (Select file).

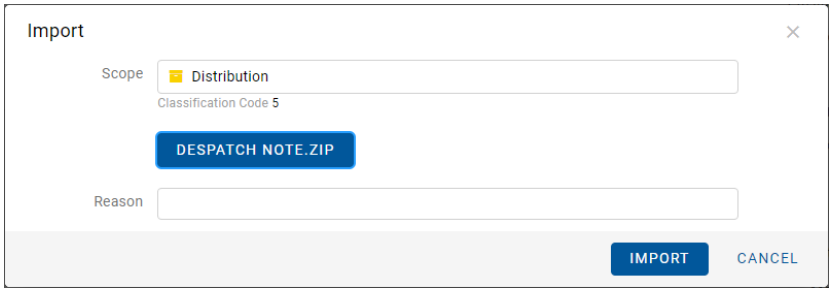

Image 319: Selecting the compressed file with the imported entities

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.

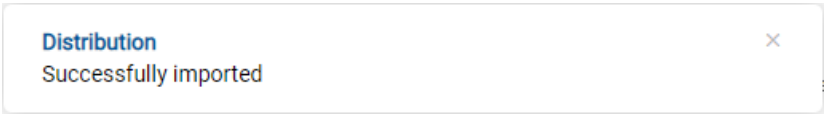

Image 320: Displaying an import notification

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.

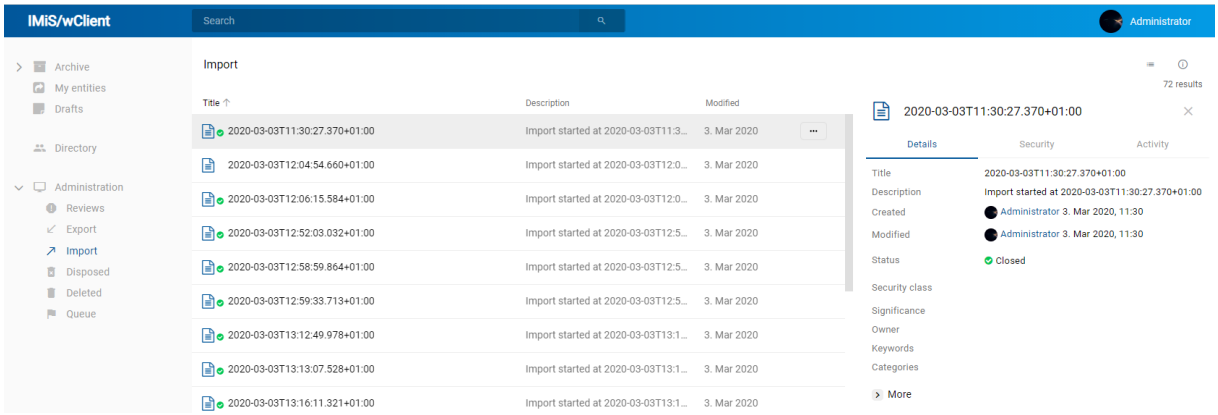

Image 321: Display of the Import folder in the Administration system folder

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.

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- 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.

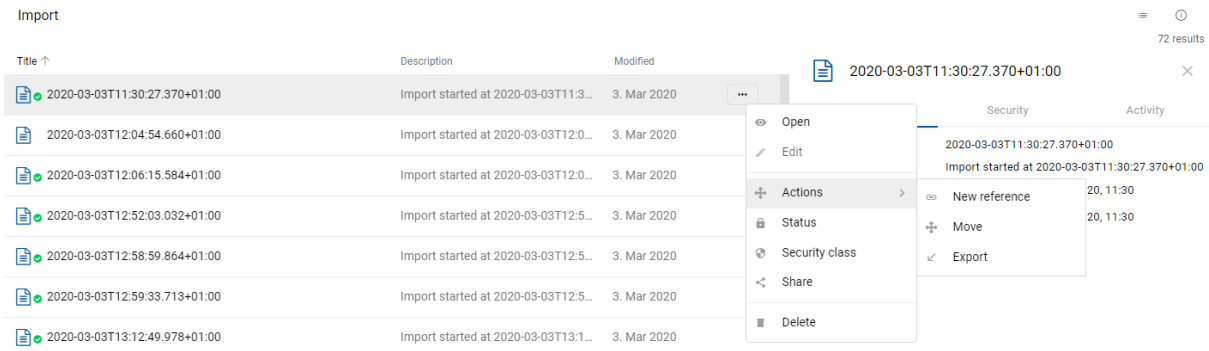

Image 322: Set of available actions on the import/export report

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.

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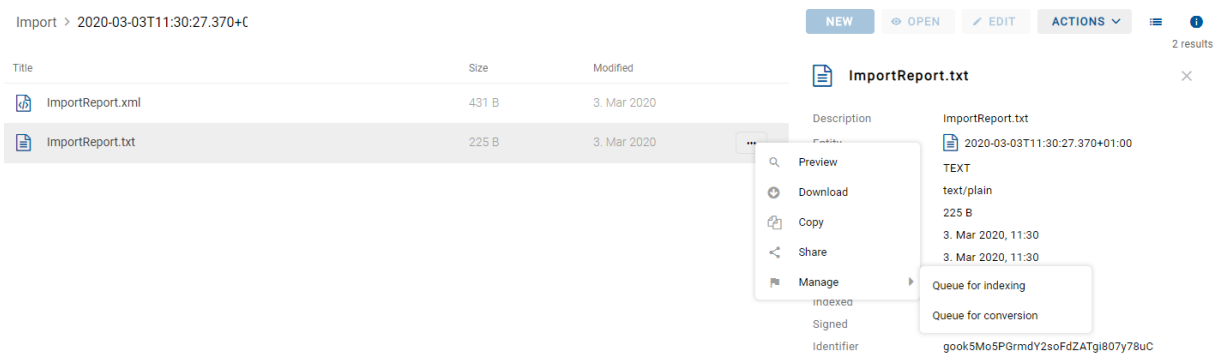

Image 323: Popup menu on a import report

4.3.12.1 Import procedure

At the start of the import procedure, the IMiS®/WClient creates a new document in the folder Import located in the »Administration« system folder. This document contains a report of the import to the archive server.

The title of the document is identical to the date and time of import, in ISO format.

The status of the document is Opened.

During import, the import document is completed with the following three log files:

- ImportReport.xml: XML file that contains:
  - import success rate statistics
  - list of failed import attempts (including the classification codes)
  - list of successfully imported files (including the hash values and full classification codes).
- ImportReport.txt: contains a report for each successfully or unsuccessfully imported entity.
- ErrorReport.txt: contains a report for each failed import attempt including the reason for the import error.

  When all entities from the list are imported, the file ImportReport.xml is digitally signed with the selected digital certificate according to the XMLDSIG standard. This ensures that the report's authenticity can be verified.

The status of the document then changes to Closed.

If there is an error while the document is being completed, the import document remains in the system class in its raw form and has the status Open.

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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.

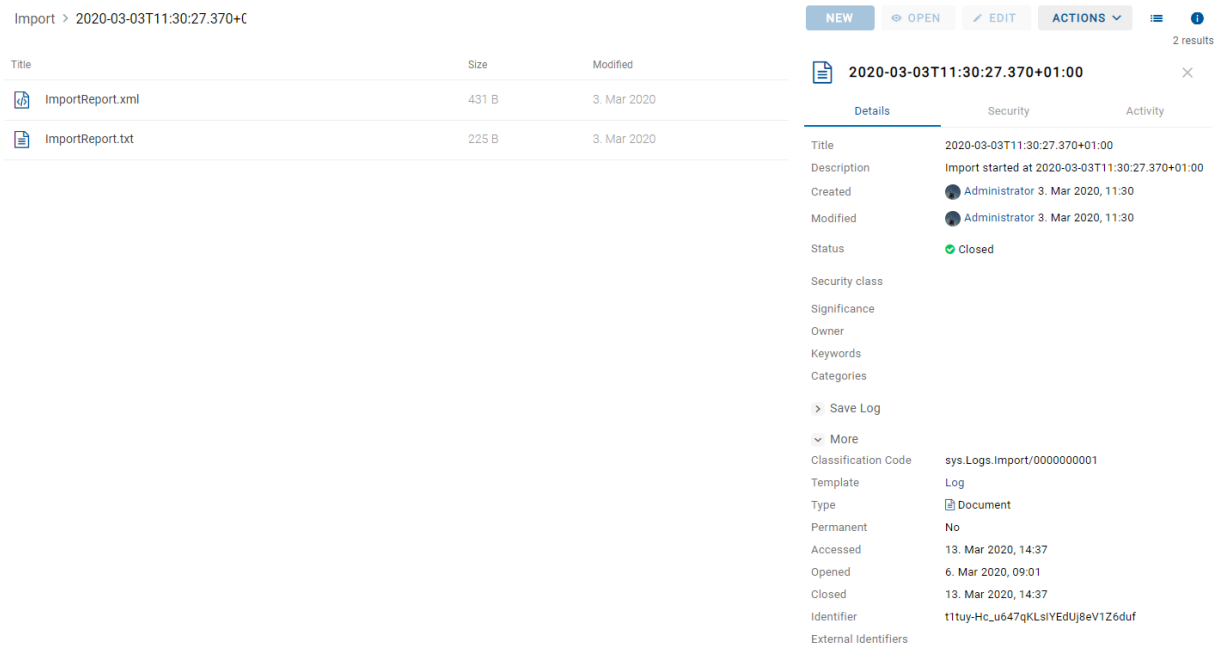

Image 324: Display of the import report in the Import system folder

By selecting the value of the attribute “Get” in the imported entity data (“Transfer audit log”) in open mode, the logged-on user is shown a notification in the bottom bar on the audit log created before importing the entity in the .bin format.

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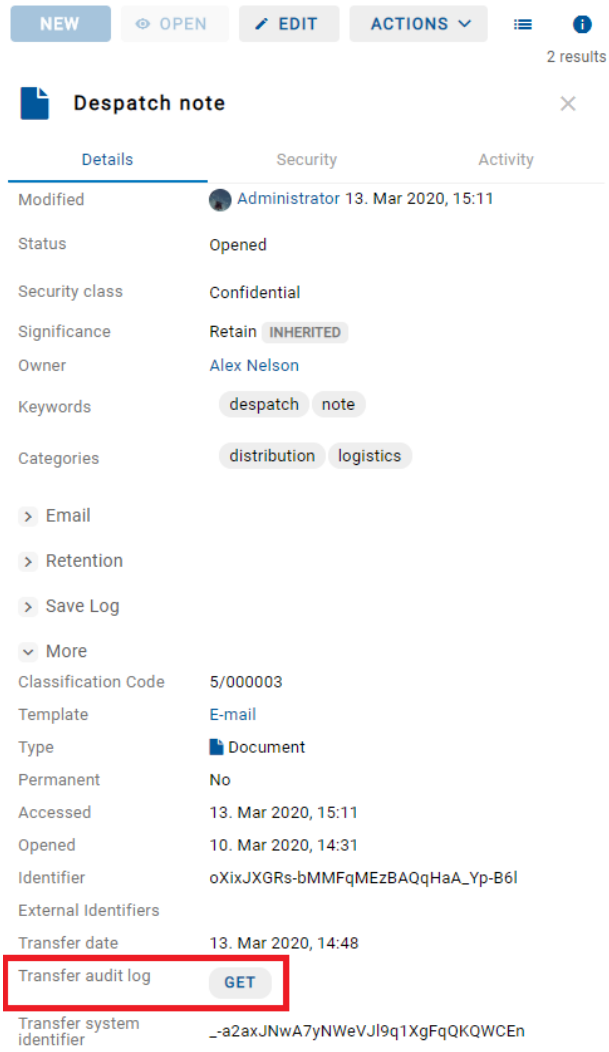

Image 325: Information about the audit log created before the entity import

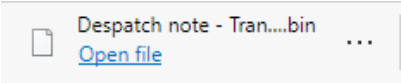

Image 326: Notification on the transfer of the audit log created before the entity import

By opening the file in a suitable application (e.g. Notepad), the user can view the audit log created before the entity import.

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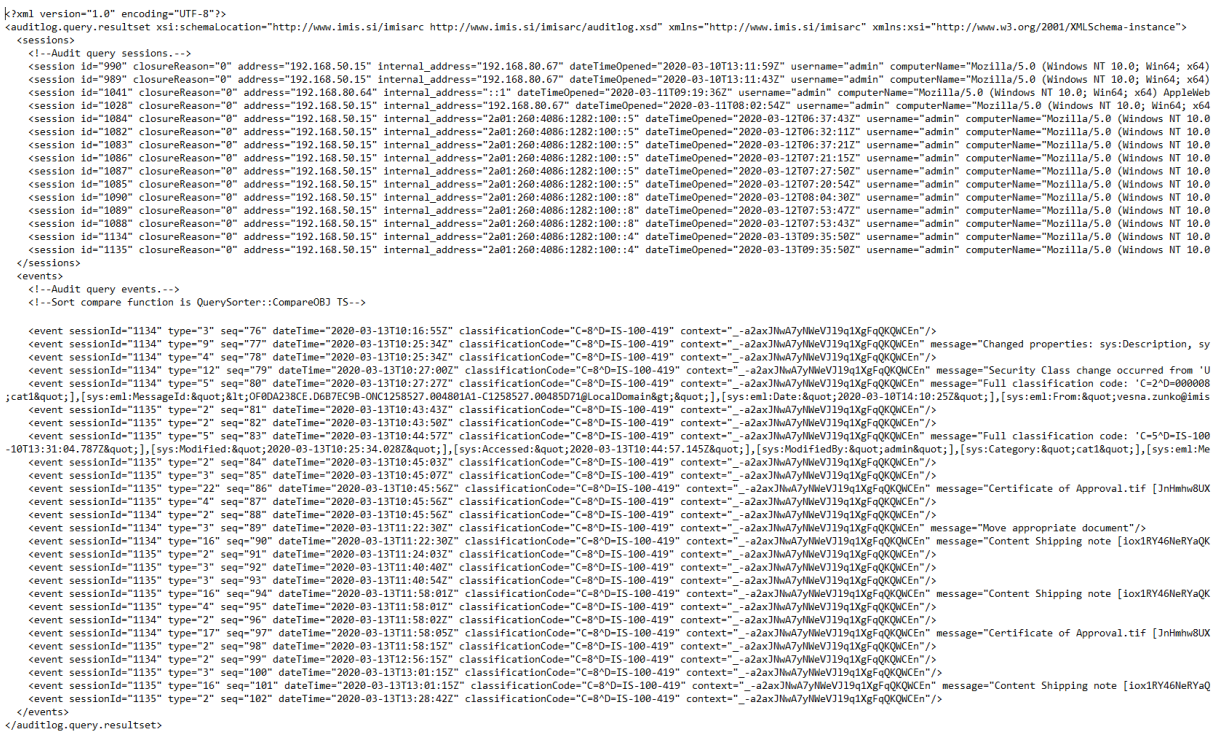

```
<?xml version="1.0" encoding="UTF-8"?>
<auditlog.query.resultset xsi:schemaLocation="http://www.imis.si/imisarc http://www.imis.si/imisarc/auditlog.xsd" xmlns="http://www.imis.si/imisarc" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <sessions>
    <!--Audit query sessions.-->
    <session id="990" closureReason="0" address="192.168.50.15" internal_address="192.168.80.67" dateTimeOpened="2020-03-10T13:11:59Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64)
    <session id="989" closureReason="0" address="192.168.50.15" internal_address="192.168.80.67" dateTimeOpened="2020-03-10T13:11:43Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64)
    <session id="1041" closureReason="0" address="192.168.80.64" internal_address="::1" dateTimeOpened="2020-03-11T09:19:36Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWeb
    <session id="1028" closureReason="0" address="192.168.50.15" internal_address="192.168.80.67" dateTimeOpened="2020-03-11T08:02:54Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0; Win64; x64
    <session id="1084" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::5" dateTimeOpened="2020-03-12T06:37:43Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0
    <session id="1082" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::5" dateTimeOpened="2020-03-12T06:32:11Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0
    <session id="1083" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::5" dateTimeOpened="2020-03-12T06:37:21Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0
    <session id="1086" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::5" dateTimeOpened="2020-03-12T07:21:15Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0
    <session id="1087" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::5" dateTimeOpened="2020-03-12T07:27:50Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0
    <session id="1085" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::5" dateTimeOpened="2020-03-12T07:20:54Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0
    <session id="1090" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::8" dateTimeOpened="2020-03-12T08:04:30Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0
    <session id="1089" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::8" dateTimeOpened="2020-03-12T07:53:47Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0
    <session id="1088" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::8" dateTimeOpened="2020-03-12T07:53:43Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0
    <session id="1134" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::4" dateTimeOpened="2020-03-13T09:35:50Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0
    <session id="1135" closureReason="0" address="192.168.50.15" internal_address="2a01:260:4086:1282:100::4" dateTimeOpened="2020-03-13T09:35:50Z" username="admin" computerName="Mozilla/5.0 (Windows NT 10.0
  </sessions>
  <events>
    <!--Audit query events.-->
    <!--Sort compare function is QuerySorter::CompareOBJ TS-->

    <event sessionId="1134" type="3" seq="76" dateTime="2020-03-13T10:16:55Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn"/>
    <event sessionId="1134" type="9" seq="77" dateTime="2020-03-13T10:25:34Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn" message="Changed properties: sys:Description, sy
    <event sessionId="1134" type="4" seq="78" dateTime="2020-03-13T10:25:34Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn"/>
    <event sessionId="1134" type="12" seq="79" dateTime="2020-03-13T10:27:00Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn" message="Security Class change occurred from 'U
    <event sessionId="1134" type="5" seq="80" dateTime="2020-03-13T10:27:27Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn" message="Full classification code: 'C=2^D=000008
;cat1&amp;quot;],[sys:eml:MessageId:&amp;quot;&amp;lt;OF0DA238CE.D6B7EC9B-ONC1258527.004801A1-C1258527.00485D71@LocalDomain&amp;gt;&amp;quot;],[sys:eml:Date:&amp;quot;2020-03-10T14:10:25Z&amp;quot;],[sys:eml:From:&amp;quot;vesna.zunko@imis
    <event sessionId="1135" type="2" seq="81" dateTime="2020-03-13T10:43:43Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn"/>
    <event sessionId="1135" type="2" seq="82" dateTime="2020-03-13T10:43:50Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn"/>
    <event sessionId="1135" type="5" seq="83" dateTime="2020-03-13T10:44:57Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn" message="Full classification code: 'C=5^D=IS-100
-10T13:31:04.787Z&amp;quot;],[sys:Modified:&amp;quot;2020-03-13T10:25:34.028Z&amp;quot;],[sys:Accessed:&amp;quot;2020-03-13T10:44:57.145Z&amp;quot;],[sys:ModifiedBy:&amp;quot;admin&amp;quot;],[sys:Category:&amp;quot;cat1&amp;quot;],[sys:eml:Me
    <event sessionId="1135" type="2" seq="84" dateTime="2020-03-13T10:45:03Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn"/>
    <event sessionId="1135" type="3" seq="85" dateTime="2020-03-13T10:45:07Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn"/>
    <event sessionId="1135" type="22" seq="86" dateTime="2020-03-13T10:45:56Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn" message="Certificate of Approval.tif [JnHmhw8UX
    <event sessionId="1135" type="4" seq="87" dateTime="2020-03-13T10:45:56Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn"/>
    <event sessionId="1134" type="2" seq="88" dateTime="2020-03-13T10:45:56Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn"/>
    <event sessionId="1134" type="3" seq="89" dateTime="2020-03-13T11:22:30Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn" message="Move appropriate document"/>
    <event sessionId="1134" type="16" seq="90" dateTime="2020-03-13T11:22:30Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn" message="Content Shipping note [iox1RY46NeRYaQK
    <event sessionId="1135" type="2" seq="91" dateTime="2020-03-13T11:24:03Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn"/>
    <event sessionId="1135" type="3" seq="92" dateTime="2020-03-13T11:40:40Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn"/>
    <event sessionId="1135" type="3" seq="93" dateTime="2020-03-13T11:40:54Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn"/>
    <event sessionId="1135" type="16" seq="94" dateTime="2020-03-13T11:58:01Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn" message="Content Shipping note [iox1RY46NeRYaQK
    <event sessionId="1135" type="4" seq="95" dateTime="2020-03-13T11:58:01Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn"/>
    <event sessionId="1134" type="2" seq="96" dateTime="2020-03-13T11:58:02Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn"/>
    <event sessionId="1134" type="17" seq="97" dateTime="2020-03-13T11:58:05Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn" message="Certificate of Approval.tif [JnHmhw8UX
    <event sessionId="1135" type="2" seq="98" dateTime="2020-03-13T11:58:15Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn"/>
    <event sessionId="1134" type="2" seq="99" dateTime="2020-03-13T12:56:15Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn"/>
    <event sessionId="1135" type="3" seq="100" dateTime="2020-03-13T13:01:15Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn"/>
    <event sessionId="1135" type="16" seq="101" dateTime="2020-03-13T13:01:15Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn" message="Content Shipping note [iox1RY46NeRYaQ
    <event sessionId="1135" type="2" seq="102" dateTime="2020-03-13T13:28:42Z" classificationCode="C-8^D-IS-100-419" context="_-a2axJNwA7yNWeVJ19q1XgFqQKQWCEn"/>
  </events>
</auditlog.query.resultset>
```


Image 327: Audit log created before the entity import

4.3.13 Export

Users who have the ImportExport role can export the complete classification scheme or any of its individual parts. Each entity is exported with all its metadata and content, while export of the audit log and additional metadata is optional. User-added metadata is not part of the entity's own metadata and is employed only for the purposes of the archiving procedure.

For more information on the export file format and file structure see chapter Format of the import / export files.

For more information on server roles see chapter Access in the IMiS®/ARChive Server Manual.

4.3.13.1 Exporting the entire classification scheme

The user begins the procedure of exporting the entire classification scheme by selecting the Actions command in the command bar and the Export action in the popup menu before selecting the root class.

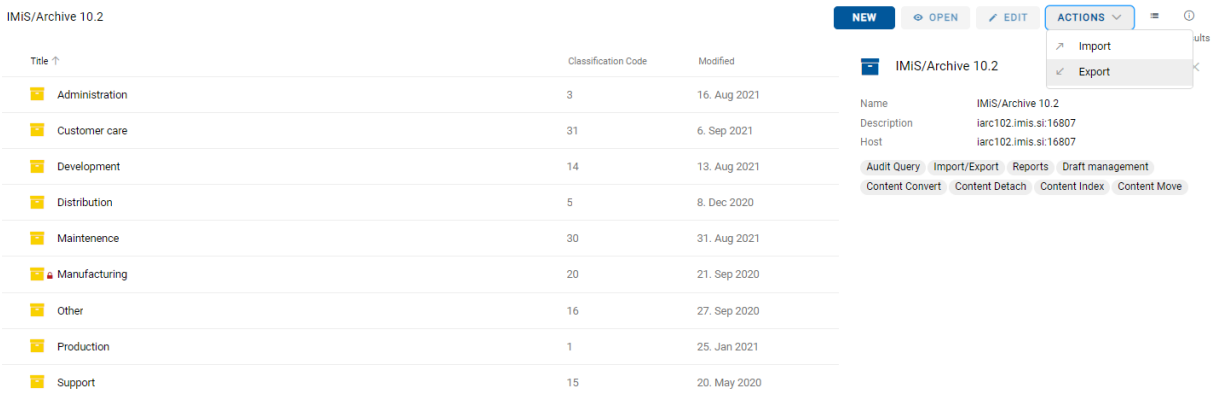

Image 328: Selecting the »Export« command at the level of the entire classification scheme

Opens a dialog box for setting the following export parameters:

- Scope: the user checks whether they want to perform an export on the entity currently selected in the classification scheme.
- Option: selecting additional export options:
  - Recursive
  - Export parents.
- Include: the user can include or exclude the following export settings:
  - Entity type: classes folders, documents.
  - Activity: the audit log of the individual exported entity.
  - Authenticity evidence: evidence on the entity's authenticity, if entity authenticity evidence has been created on the archive.
- Select metadata file: additional metadata from the XML file, which will be included in the export. For a description of the structure of the additional metadata file see chapter Format of the additional metadata export file.

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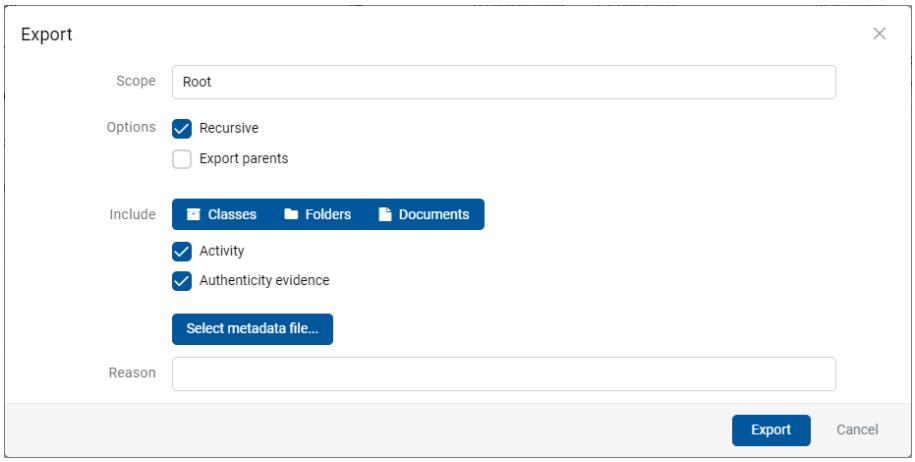

Image 329: Setting the export parameters on the entire archive

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).

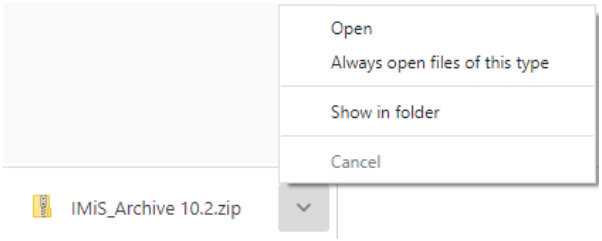

Image 330: Notification about saving a file of exported entities of the entire classification scheme

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

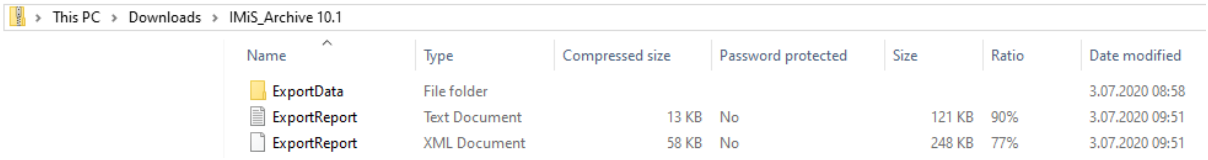

Image 331: Information about the export of the entire classification scheme

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

```
Exporting scope:'3', subject:'admin', recursive:true, exportParents:false, classes:true, folders:true, documents:true, auditLog:true, evidence:true

2020-09-22T16:08:56.827+0200 - Exported Class '3' into file ExportData/class_1.xml
2020-09-22T16:08:57.254+0200 - Exported Document '3/000033' into file ExportData/document_1.xml
2020-09-22T16:08:57.397+0200 - Exported Document '3/000034' into file ExportData/document_2.xml
2020-09-22T16:08:58.005+0200 - Exported Document '3/000042' into file ExportData/document_3.xml
2020-09-22T16:08:58.379+0200 - Exported Document '3/000044' into file ExportData/document_4.xml
2020-09-22T16:08:58.444+0200 - Exported Class '3.31' into file ExportData/class_2.xml
2020-09-22T16:08:58.578+0200 - Exported Document '3.31/000001' into file ExportData/document_5.xml
2020-09-22T16:08:58.679+0200 - Exported Folder '3-IS' into file ExportData/folder_1.xml
2020-09-22T16:08:59.094+0200 - Exported Document '3-IS/000002' into file ExportData/document_6.xml
2020-09-22T16:08:59.223+0200 - Exported Document '3-IS/000003' into file ExportData/document_7.xml
2020-09-22T16:08:59.314+0200 - Exported Folder '3-IS-IS' into file ExportData/folder_2.xml
2020-09-22T16:08:59.493+0200 - Exported Document '3-IS-IS/000001' into file ExportData/document_8.xml
2020-09-22T16:08:59.630+0200 - Exported Document '3-IS/IS-212' into file ExportData/document_9.xml
2020-09-22T16:08:59.735+0200 - Exported Document '3-IS/IS-514' into file ExportData/document_10.xml
2020-09-22T16:08:59.854+0200 - Exported Document '3-IS/IS-632' into file ExportData/document_11.xml
2020-09-22T16:08:59.976+0200 - Exported Document '3-IS/IS-710' into file ExportData/document_12.xml
2020-09-22T16:09:00.093+0200 - Exported Document '3-IS/Social-2020' into file ExportData/document_13.xml
2020-09-22T16:09:00.161+0200 - Exported Folder '3-IS-417' into file ExportData/folder_3.xml
2020-09-22T16:09:00.495+0200 - Exported Document '3/IS-CC-027' into file ExportData/document_14.xml
2020-09-22T16:09:00.874+0200 - Exported Document '3/IS-EXP-1000' into file ExportData/document_15.xml

Class entities: OK(2) Fail(0)
Folder entities: OK(3) Fail(0)
Document entities: OK(15) Fail(0)
```

Image 332: Display of a more detailed notification about the export of the entire classification scheme

4.3.13.2 Exporting of the classification scheme

The procedure of exporting an individual part of the classification scheme begins by selecting an entity in the classification scheme or from the list of entities.

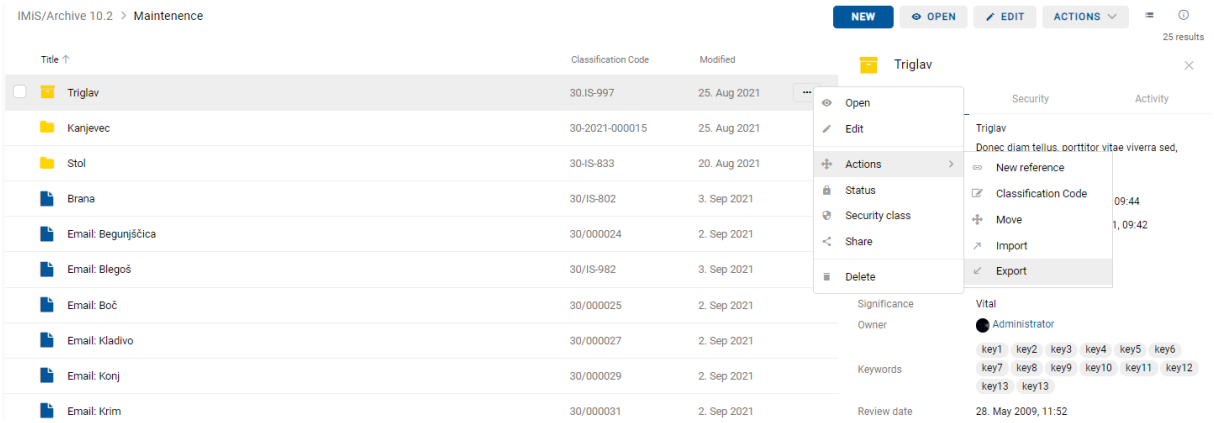

Image 333: Selecting the Export action on the selected entity

After selecting the Actions command in the command bar and the Export action in the popup menu, the user is shown a dialog box for setting the export parameters.

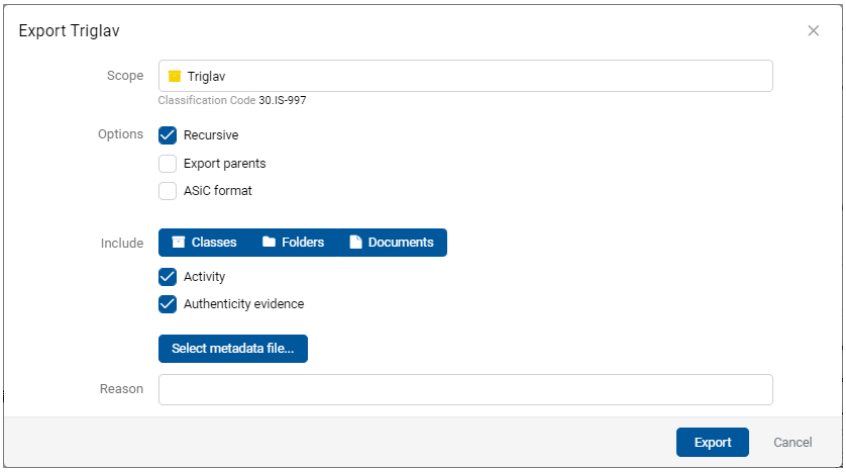

Image 334: Setting the export of the entity tree via a dialog box

In the Options section, in addition to the export settings described in chapter Exporting the entire classification scheme, the user is also provided the following:

- ASiC format: interoperable forms of content export with the associated authenticity evidence. Export in the ASiC format enables only the export of a single selected entity. The ASiC format is in the "Extended" form, where multiple evidence is possible for the exported contents. The basic information is available at https://en.wikipedia.org/wiki/Associated_Signature_Containers.

By selecting the action "Export", the export process begins. The user can cancel the export process by selecting the "Cancel" command.

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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.

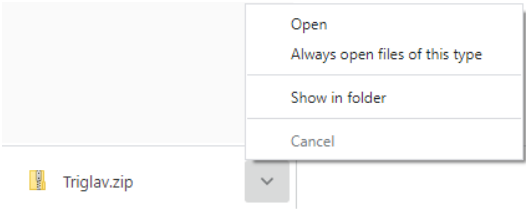

Image 335: Notification about saving a file of individual exported entities

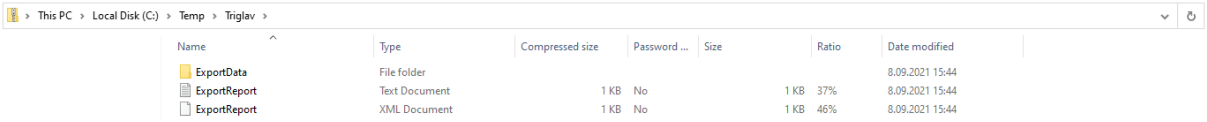

Image 336: Information about the export of a part of the classification scheme

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

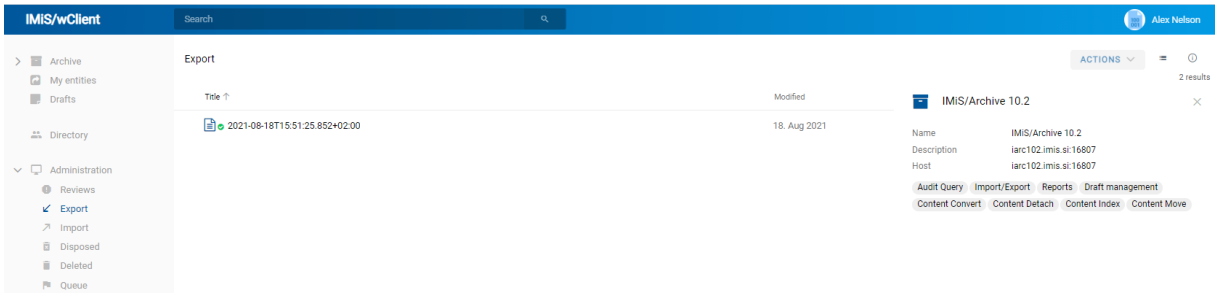

Image 337: Display of the Export folder in the Administration system folder and the document selected for export

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.

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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.

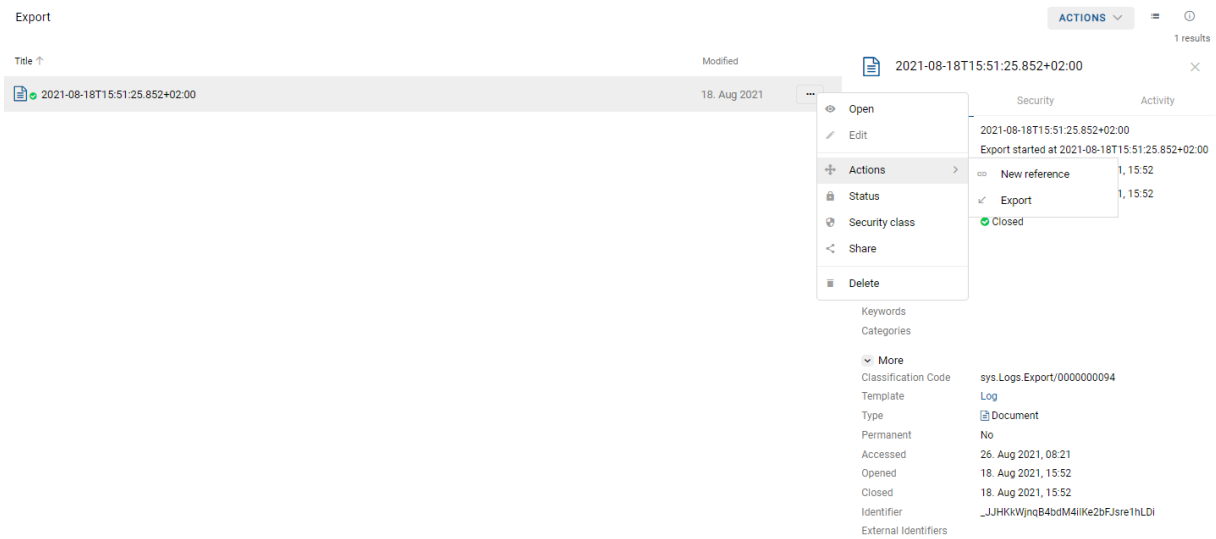

Image 338: Set of available actions on the export report

By selecting the popup menu on the export report, the user can choose from the following options:

- Preview: For more information on content preview see chapter Content preview.
- Download: For more information on downloading content see chapter Downloading content.
- Copy: copying the content to another document.
- Share: copying the link to the selected export report to be shared with other users.
- Manage:
  - Queue for Indexing. For more information on indexing content see chapter Indexing content.
  - Queue for Conversion. For more information on content conversion see chapter Content conversion.

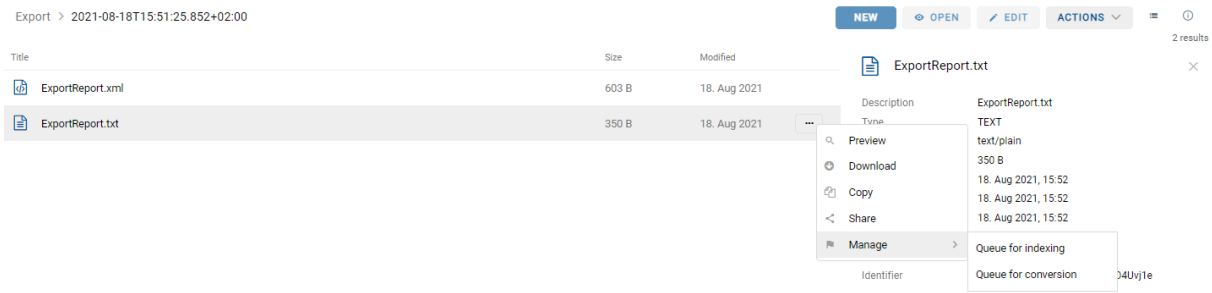

Image 339: Popup menu on the export report

4.3.13.3 Export procedure

At the start of the export procedure, the IMiS®/wClient creates a new document in the folder Export located in the Administration system folder. This document contains a report on the export from the archive server.

The title of the document is identical to the date and time of export, in ISO format. The status of the document is Opened.

During exporting, the export document is completed with the following two or three log files:

- ExportReport.xml: XML file that contains:
  - Statistics of successfully and unsuccessfully exported entities.
  - List of failed export attempts (including the classification codes).
  - List of successfully exported files (including hash values and full classification codes).

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- 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.

Image 340: 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.

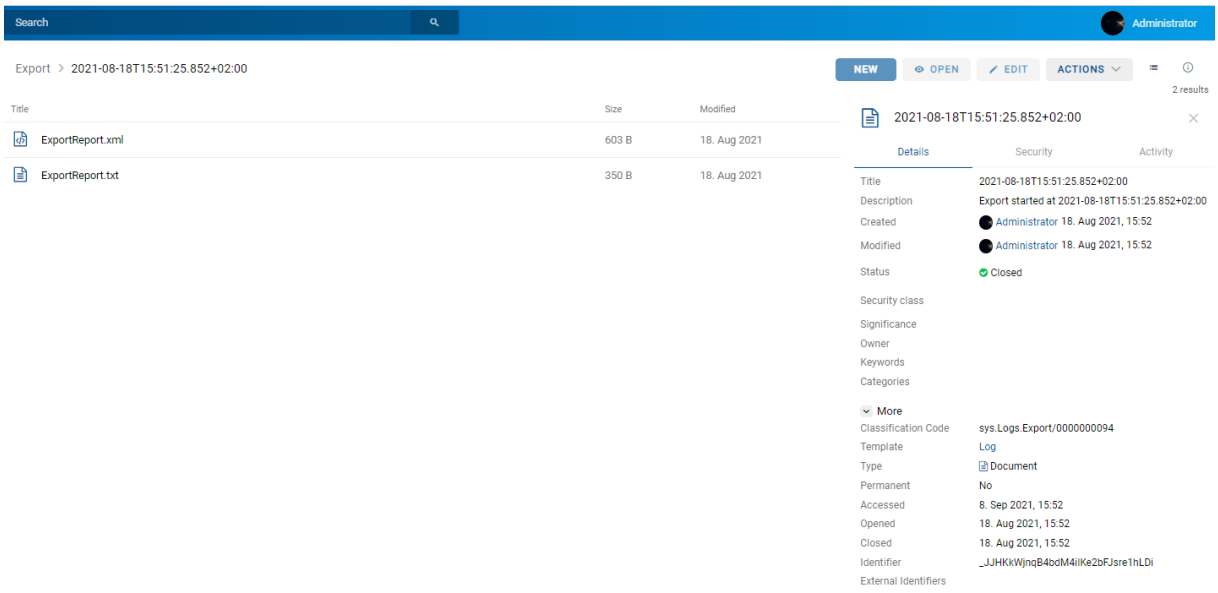

Image 341: Export report

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

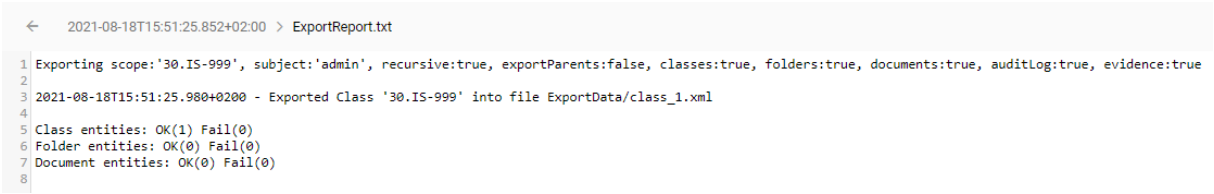

Image 342: Display of a more detailed notification about the export

Warning: The user can export different entities into the selected export folder several times, without having to delete previous export files. When saving exported entities into the selected folder, the previous export files are overwritten.

4.3.14 Deletion of an entity

To execute a delete action, the user must have the Delete right on the selected entity.

To learn how to check the effective rights of a user see chapter Entity information.

The IMiS®/wClient enables two ways of removing an entity from the classification scheme:

- Immediate deletion.
- Marking an entity for later deletion (delete queue).

4.3.14.1 Immediate deletion of an entity

Prior to deletion, the user has to make sure the classes or folders he is about to delete do not contain entities. Entities namely cannot be deleted. The same is valid for all closed entities (the value of the Status attribute is Closed).

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The user can delete an entity by selecting the Actions command in the command bar and Delete in the popup menu.

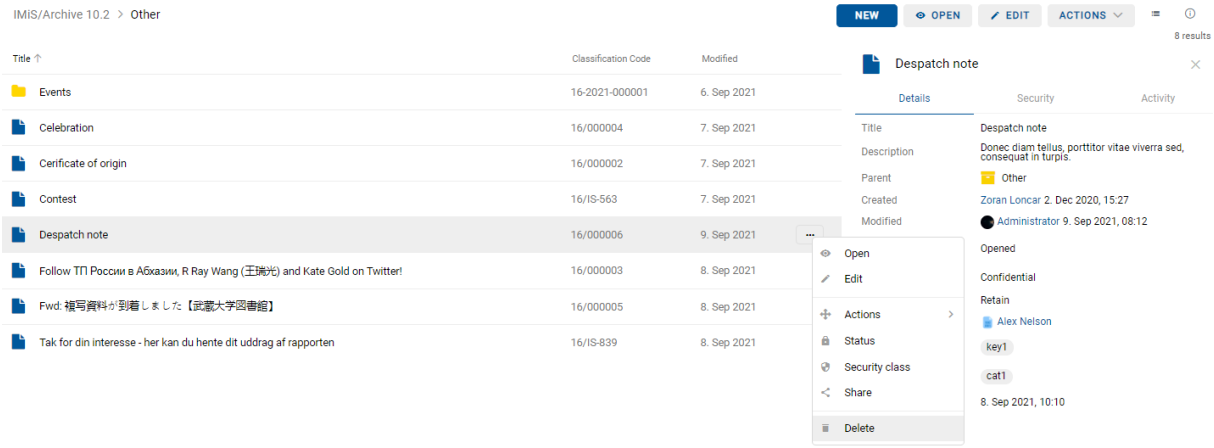

Image 343: Selecting the Delete command

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

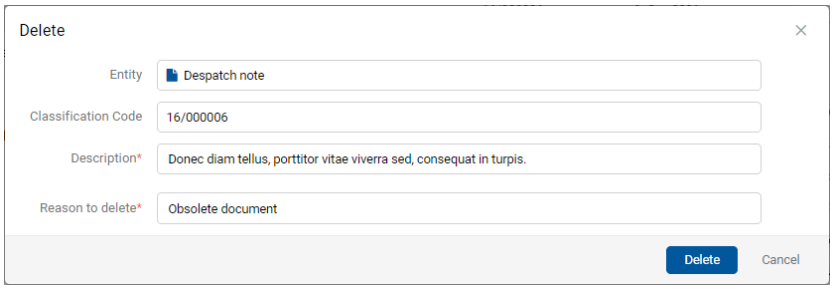

Image 344: A dialog box for deleting an individual entity

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.

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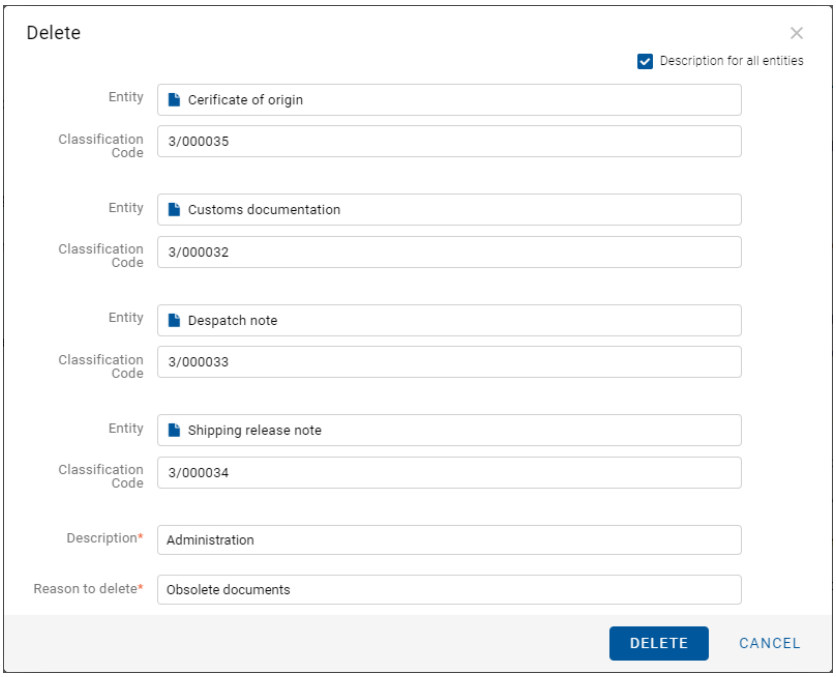

Image 345: A dialog box for deleting multiple entities

The user has the option of defining a single description for all selected entities ("Description for all entities"). The user does that by checking the checkbox.

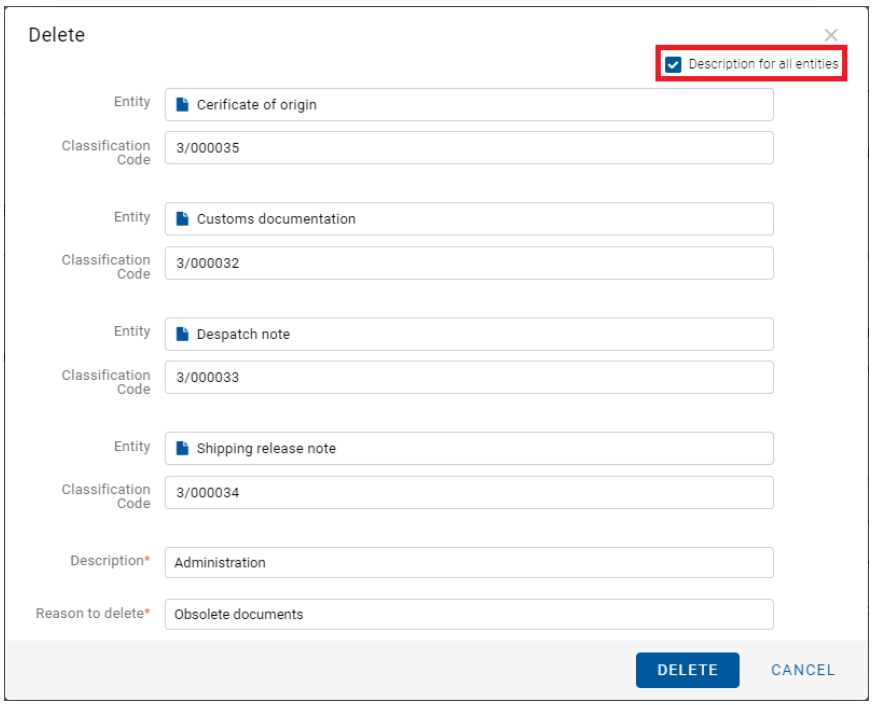

Image 346: Selecting a single description for all entities selected for deletion

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Before confirming the deletion, the user defines a single description for all selected entities ("Description") and the "Reason to delete".

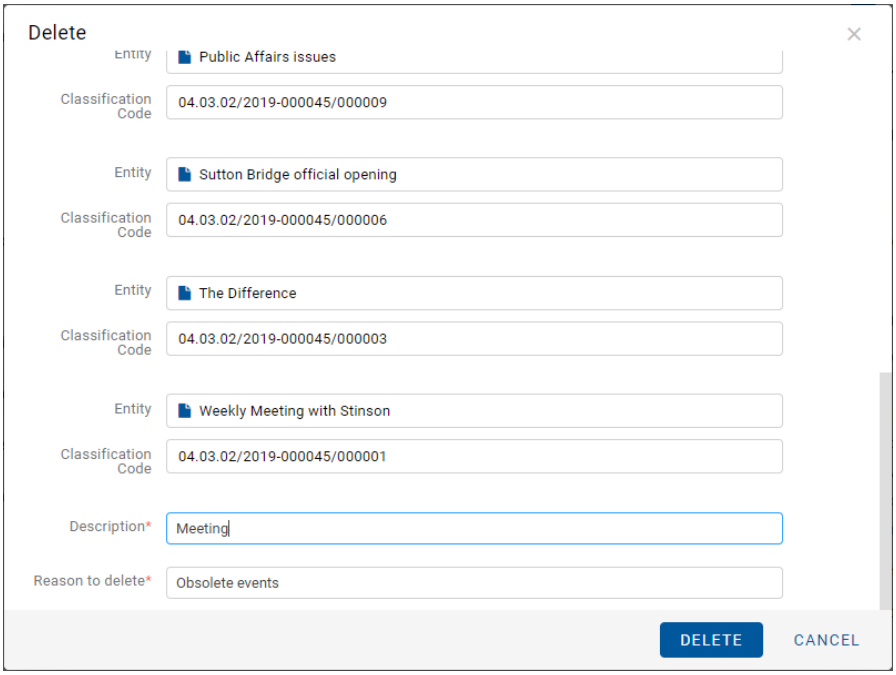

Image 347: Selecting a single description for all selected entities

After the reason for the deletion has been entered, the command OK, or Delete in the case of deleting multiple entities, is enabled.

4.3.14.2 Marking an entity for later deletion

If the user has the Write access right on the entity but does not have the Delete access right, user is able to mark the entity for later deletion. For the display of a user's current effective access rights see chapter The Security tab.

All types of entities can be marked for later deletion. The procedure is as follows:

1. User finds and selects the entity he wishes to mark for later deletion.
2. By choosing the Edit command, the selected entity is opened in editing mode.
3. In the first tab Details, select the Significance attribute. Change the value of this attribute to Delete in the pick list of possible attribute values.
4. When the value of the Significance attribute is changed, save the entity using the Save command. The new value Delete is then stored to the server.

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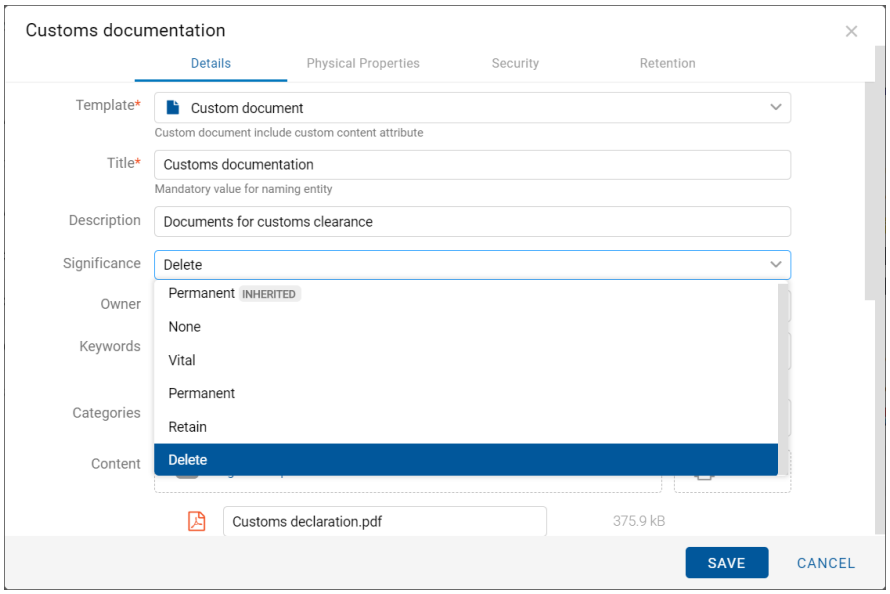

Image 348: Marking an entity for later deletion

4.3.14.3 Managing the delete queue

Entities whose Significance attribute is set to Delete appear in the list of entities waiting for deletion. This list is found in the Queue folder in the Trash folder in the Administration« system folder.

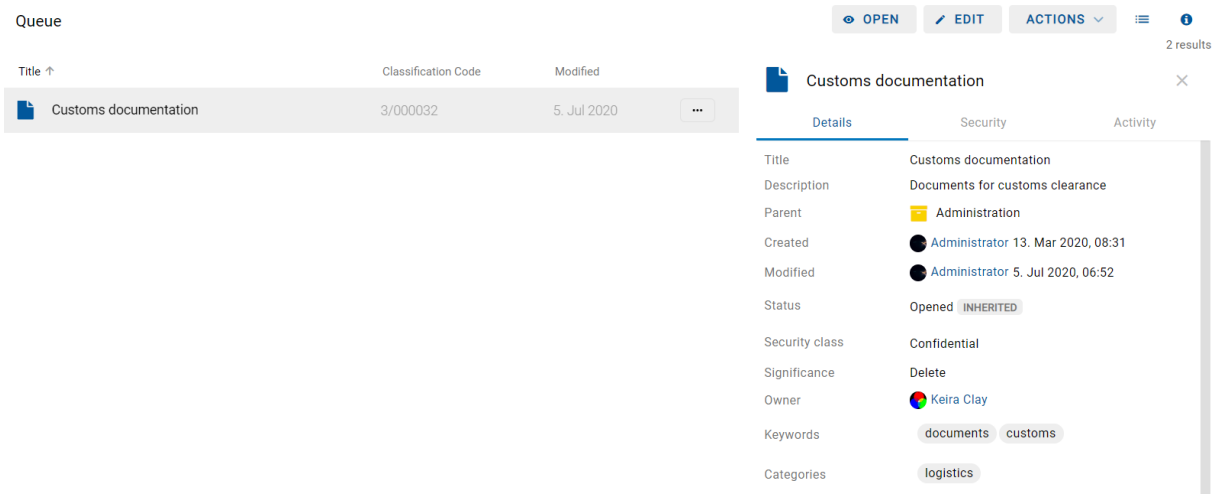

Image 349: A list of entities suggested for deletion in the Delete queue list folder

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.

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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.

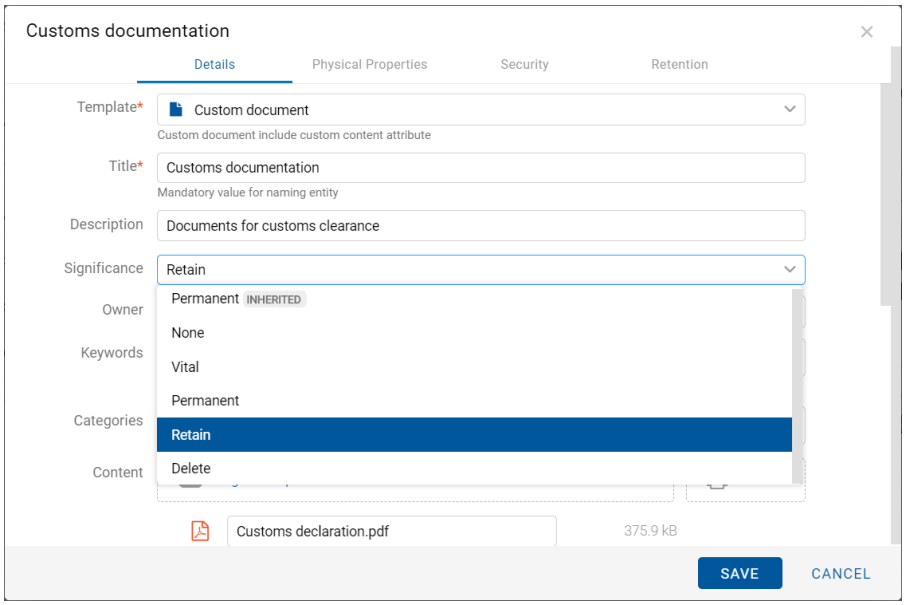

Image 350: Removing an entity from the delete queue list

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.

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4.3.14.4 Deleted entities

Each entity deleted by the user is located in its basic form in the Deleted subfolder of the Trash folder in the Administration system folder.

By selecting the Trash folder, the central view will display all the deleted entities.
The list of deleted entities shows the following entity information:

- Title: the title of the deleted entity.
- Classification code: the classification code of the deleted entity.
- Deleted: the date and time of deleting the entity from the archive server.
- Description: a required description of the deleted entity. If an entity had no description before deletion, the delete action requires the input of a description.

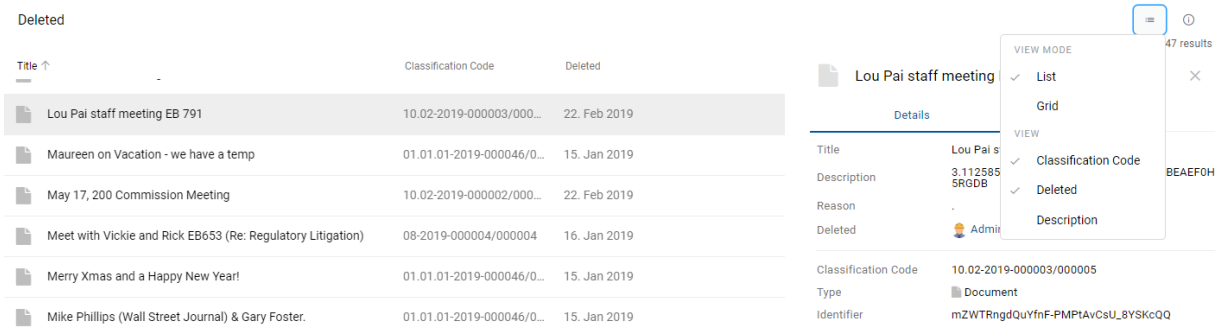

Image 351: Display of the Deleted folder in the Administration system folder

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.

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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 14: Description of possible attribute properties

In addition to limitations that specify attribute properties, certain other system limitations also apply. For example, some attributes are only available for specific types of entities, and some only for entities in a specific location in the classification scheme, or after a specific action has been executed (e.g. transfer)

All the system attributes of the IMiS®/ARChive Server are described below.

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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	Contains the entity's classification code within the classification scheme. The classification code is generated automatically on the archive server. *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.*
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: • 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: • Vital: entity is vital. • Permanent: entity is permanent. • Retain: entity should be retained. • Delete: entity is queued for deletion.

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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: • 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. *Warning: When entering values, keywords should be separated using the Enter key or the semicolon character (;).*
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 15: Description of general system attributes

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4.4.2 Security class change attributes

Security class change attributes are created by the IMiS®/ARChive Server when an entity's security class is changed. They store the agent of the change, the reason and date of the change, and the value before and after the security class change.

Name	Description
Agent	Contains the agent (user who changed the entity's security class).
Reason	Contains the reason for the security class change.
Modified date	Contains the date and time the security class was changed.
Before change	Contains the security class value prior to the change.
After change	Contains the security class value after the change.

Table 16: Description of security class change attributes

4.4.3 Moved entity attributes

Moved entity attributes are created by the server when an entity is moved. They store the agent of the move, the reason and the date.

Name	Description
Agent	Contains the agent of the move.
Reason	Contains the reason for the move.
Moved date	Contains the date and time the entity was moved.

Table 17: Description of moved entity attributes

4.4.4 Deleted entity attributes

Deleted entity attributes are created by the server when an entity is deleted. They store the agent of deletion, the classification code, the reason for the deletion and its date.

Name	Description
Agent	Contains the agent of the delete action.
Classification code	Contains the classification code of the deleted entity.
Reason	Contains the reason for the entity's deletion.
Deleted date	Contains the date and time the entity was deleted.

Table 18: Description of deleted entity attributes

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4.4.5 Transferred entity attributes

Transferred entity attributes are created by the server when an entity is imported.

They store the system identifier, the classification code of the transferred entity, the audit log and the date of import.

Name	Description
System Id	Contains the unique system identifier of the transferred entity.
Classification code	Contains the classification code of the transferred entity.
Audit log	Contains the audit log of the transferred entity.
Imported date	Contains the date and time the entity was transferred.

Table 19: Description of moved entity attributes

4.4.6 Email attributes

Email attributes are only available for documents that have been created using an email template. Email attributes store information about the email such as the sender, recipients, and sent date.

Name	Description
Message Id	Contains the automatically generated message identifier.
From	Contains the address of the sender. This metadata is mandatory.
To	Contains the addresses of the email's recipients.
CC	Contains the addresses of the email's CC recipients.
BCC	Contains the addresses of the email's hidden recipients.
Subject	Contains the subject of the email message.
Priority	Contains the email priority status.
Signed	Contains a value that registers if the email was electronically signed.
Date	Contains the date and time the email was sent. This metadata is mandatory.

Table 20: Description of email attributes

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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: - CheckedIn: the physical content is stored at its home location. - CheckedOut: the physical content has been sent to another location.
Status change date	Contains the date and time of the physical content's last status change.
Home location	Contains the home location of the physical content.
Current location	Contains the current location of the physical content.
Custodian	Contains the name of the physical content's custodian.
Return date	Contains the expected return date of checked out content.

Table 21: Description of physical content attributes

4.4.8 Review process attributes

Review process attributes are available only during review processes.

Name	Description
Members	Users who perform review process.
Action	By selecting one of the valid values, you influence the review process. Valid values: • 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.

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Name	Description
State	This value is set by IMiS®/ARChive Server during the review process. Valid values: • 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 22: Description of review process attributes

4.4.9 Entity attributes in the decision-making process

Decision-making entity attributes are available only to the entity undergoing the process.

Name	Description
Classification code	Contains the entity classification code in the classification scheme.
Title	Title of the selected entity.
Action	Contains the action which will be implemented over the selected entity during the execution process. This value is copied from the effective retention policy.
Reason	Contains the reasons for the action to be implemented over the entities. This value is copied from the effective retention policy.
Comment	Contains a random comment which is entered during the transfer process.
Transferred	This attribute value states whether the entity transfer was successful or not. Valid values: “true” or “false”.
Transfer id	Contains a value that represents a reference to the transferred entity.

Table 23: Description of entity attributes in the decision-making process

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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.

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4.5.1.2 Revocation of the digital certificate

A trusted certificate authority can revoke their certificate(s), making them invalid.
The authority's digital certificate server contains lists of active and revoked certificates.
The Certificate Revocation List (CRL), based on the X.509 standard, shows a list of certificates (ID code, date and time of revocation) that were revoked by the authority before having expired.

4.5.2 Electronic signature

Electronic signatures are based on asymmetrical cryptography. Users signs content with their own private key. The private key is only accessible to a particular user and is saved in their digital certificate, protected by a password. The password is set by the user upon installation and can also be changed later.

The public key is accessible to anyone, and the trusted certificate authority (CA) guarantees it belongs to a particular organization. Anyone can verify the organization's digital signature by processing it with the corresponding public key.

The electronic signature proves the authenticity and integrity of a signed document. It enables recognition of the signer, confirms the content has not been modified, and provides a link between the signer and the signed content.

Any change to the content of a document or its metadata will make the signature invalid.

4.5.2.1 Process of electronic signing

Using the electronic signature, the user integrates data from the digital certificate with the content of the document. On the basis of a hash algorithm, the complete content of the document is transformed into a unique string of data (digital fingerprint), which is encrypted with the user's private key. The private key is stored in the digital certificate or in a separate private key storage location, depending on the settings.

The digital fingerprint is integrated with the content of the document along with information about the digital certificate and the corresponding public key, but not the private key.

Note: The IMiS®/wClient does not (yet) enable the electronic signing of TIFF and PDF/A-type files.

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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.

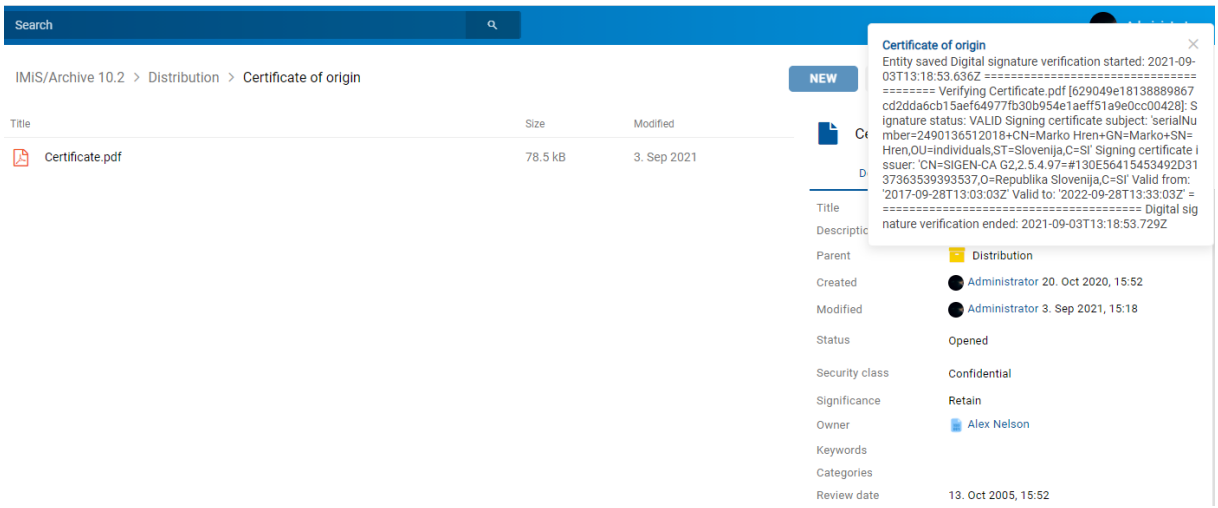

Image 352: Popup window containing the result of the document's electronic signature verification.

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.

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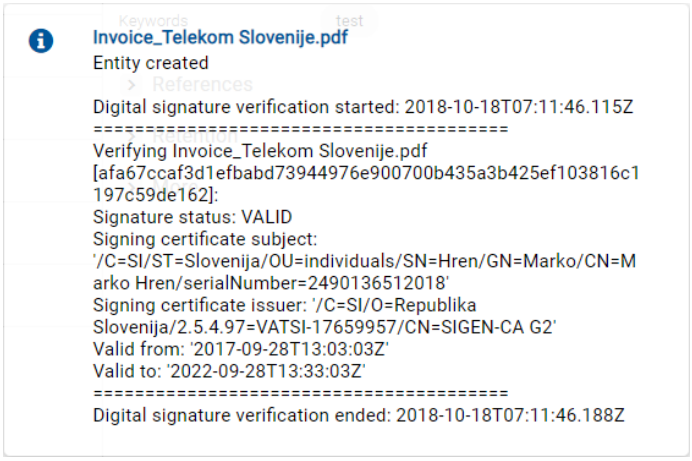

Image 353: Example of a report for a valid electronic signature and valid digital certificate

Image 354: Example of a valid electronic signature and an expired digital certificate

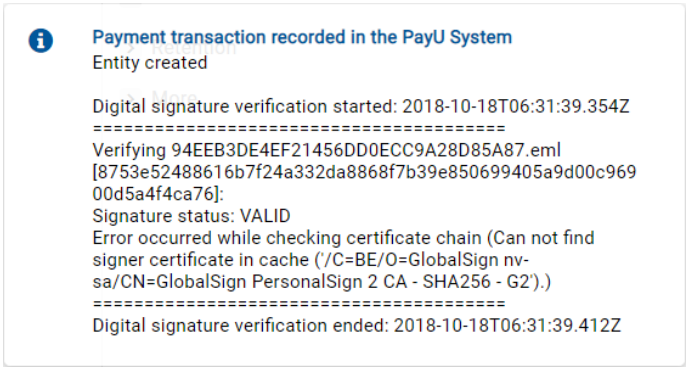

Image 355: Example of a valid electronic signature
for which the certification authority could not be verified.

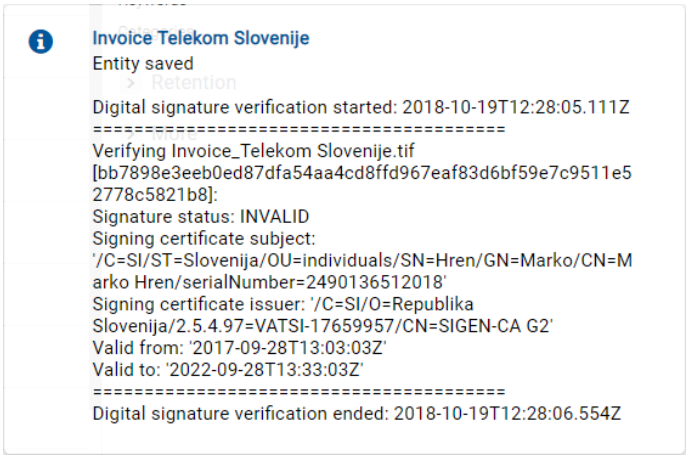

Image 356: Example of an invalid electronic signature due to a modification of the document after signing.

4.6 Review process

Each entity in the classification scheme has its own life span. Each class, folder or document classified directly under a class must have at least one retention period set, which specifies the time frame for the retention of an individual entity in the archive.

In addition to the time frame, the retention policy also contains the default action which will be implemented in the review process. This action can be changed by the team members during a controlled and planned process of implementation the transfer, disposition or permanent retention of the content.

IMiS®/wClient enables the user to:

- Prepare the review process.
- Review and select entities during the decision-making process.
- Implement the review process.
- Transfer selected entities.
- Review the content of documents.
- Review the selected retention periods.
- Transfer save log.

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

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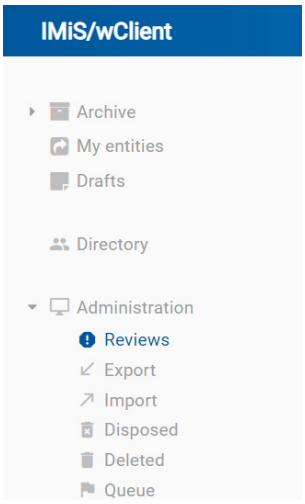

Image 357: The Reviews folder in the left view

The review process can be implemented by users with the Read access rights, which grants them access to the Reviews folder. Creating reviews is enabled for users with the Create entities right.

4.6.1 Preparation phase

In the left view, the user selects the Administration system folder in which the Reviews folder is located. By selecting the folder, the central view shows the already prepared Reviews, if any.

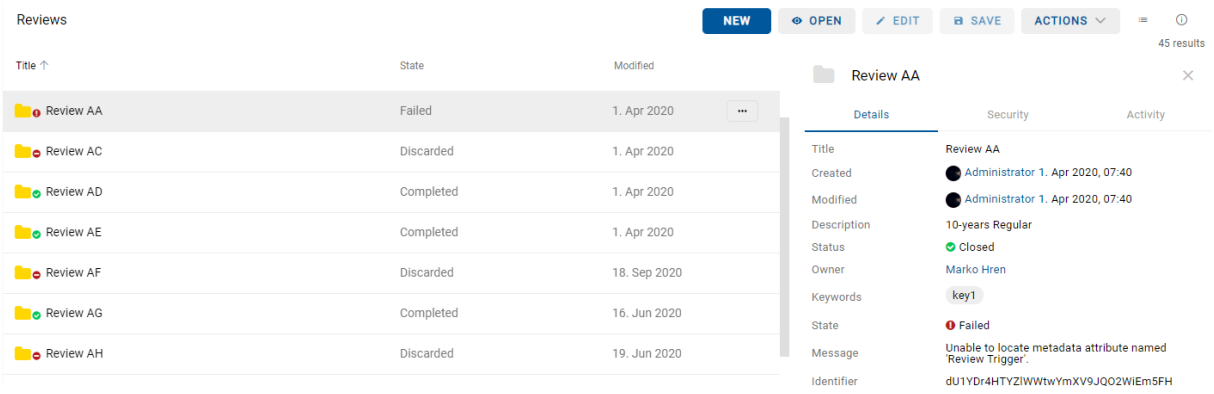

Image 358: A list of reviews in the review process

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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.

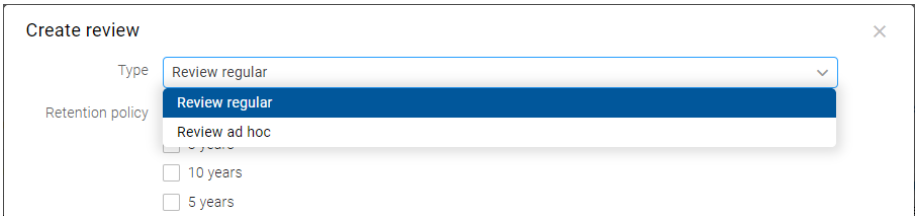

Image 359: Selecting the review type

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.

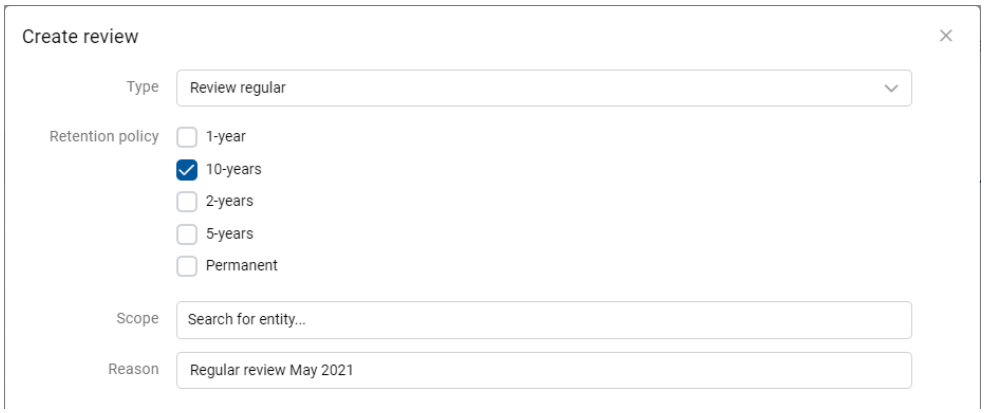

Image 360: Creating a new Regular review in the preparation phase

- Scope: selecting the entire archive or entity under which the review will be implemented.
- Reason: the reason for creating the review.

After confirmation with the Next command, the user is shown the attributes of a new review in the review process in the Details tab. The user appropriately supplements the review details.

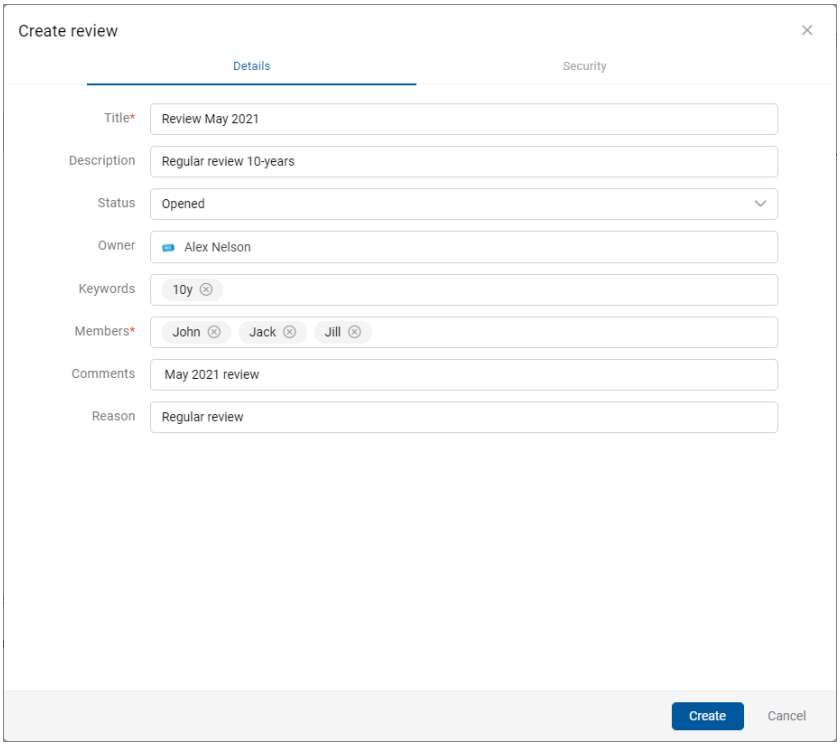

Image 361: Display of Regular review attributes in the review process

In the Security tab the user with the appropriate rights defines the access permissions for users, groups and attributes of the directory entity type. For more information on defining access permissions see chapter Entity access.

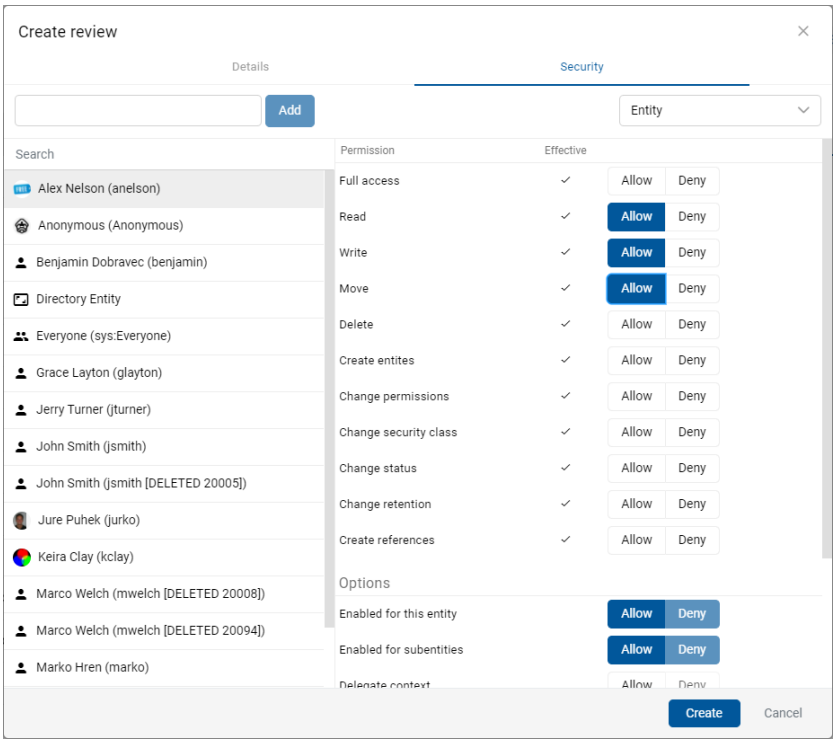

Image 362: Access permissions for Regular review in the Security tab

After entering the metadata, the user saves the review to IMiS®/ARChive Server by selecting the action Create. While preparing the entities for review, the review status changes to "Preparing".

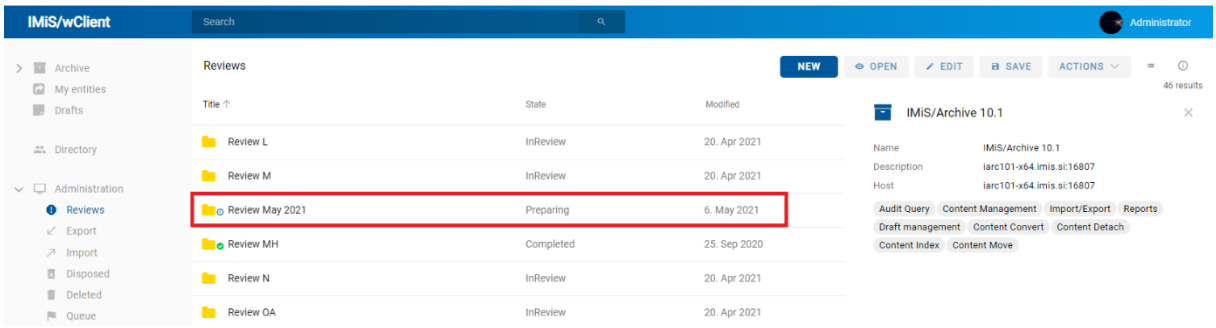

Image 363: Display of the saved Regular review

The Details tab contains the following information on review:

- Title: the title of the review.
- Created: the user that created the review and the date and time of creating the review.
- Modified: the user that last edited the review and the date and time of the last change to the review.
- Description: a short description of the review.
- Status: the status of the review.
- Owner: a directory (user or group) entity that is responsible for the selected review.
- Keywords: keywords related to the review. Attribute can have multiple values.
- State: the state of the review.
- Message: a message to the user regarding the review process.
- Authenticity evidence: obtaining authenticity evidence of the selected review. In case authenticity evidence for the selected entity already exists on the archive,

  the user can obtain authenticity evidence by selecting the icon GET in the Details tab in the right view. For more information see chapter Acquiring the authenticity evidence.
- Identifier: the identifier of the review.

The entities imported by a user with the ImportExport role have to be compressed (.zip) and prepared in the prescribed XML format.

4.6.1.1.2 Ad-hoc review

After selecting the Ad hoc command, the following fields for entering the value of the attribute Expression appears to the user:

- Expression: query based on which a list of selected entities will be created.
- Scope: selecting the entire archive or entity under which the custom review will be implemented.
- Reason: the reason for creating the custom review.

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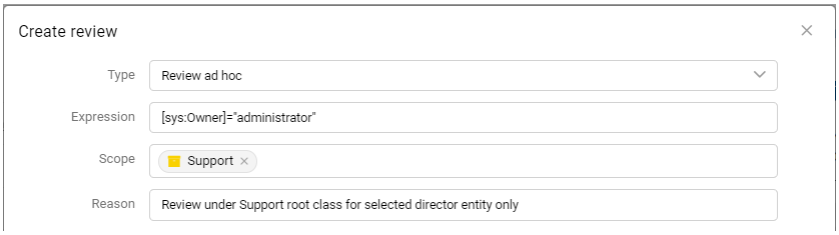

Image 364: Entering a search expression in the Ad hoc review

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.

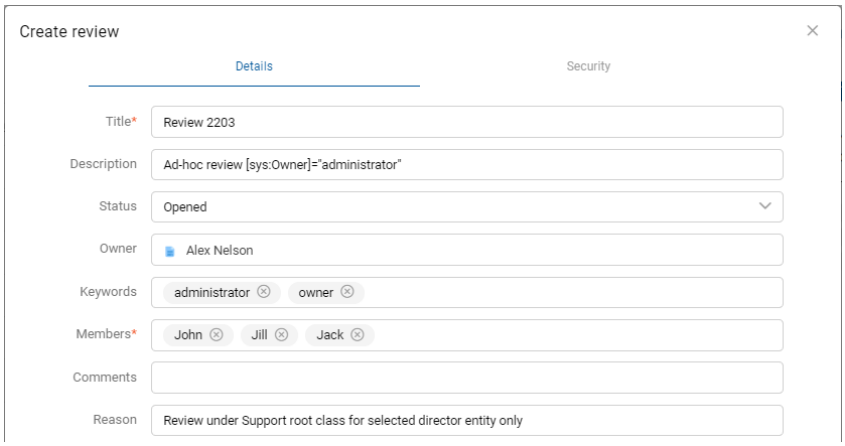

Image 365: Display of the attributes of the review process in the Ad hoc mode

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.

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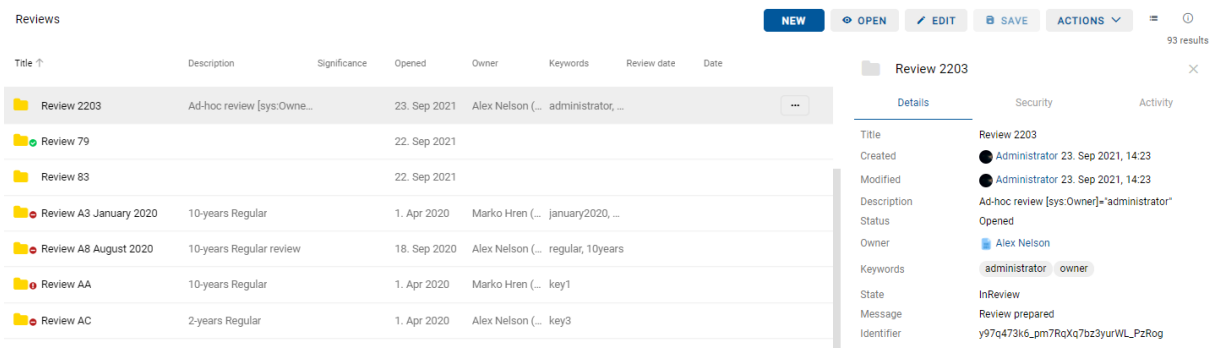

Image 366: Display of a saved ad-hoc review

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.

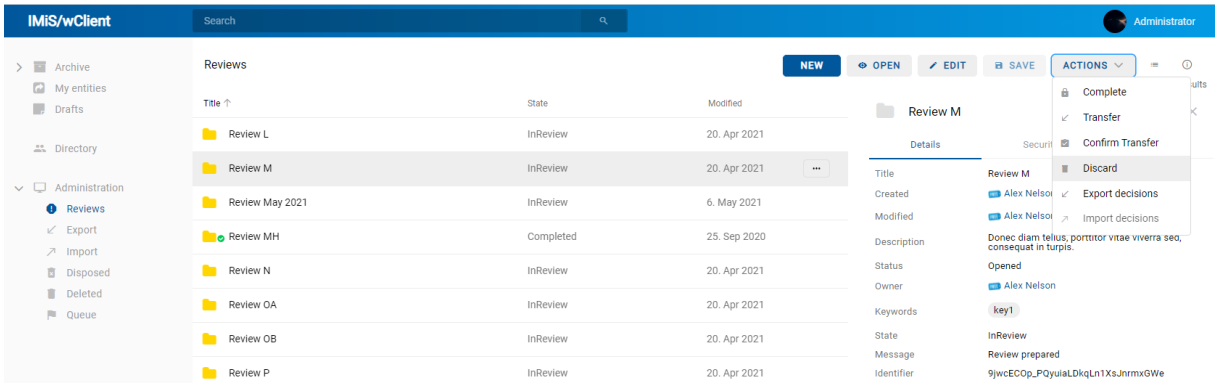

Image 367: Cancellation of the review process using the Discard command

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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.

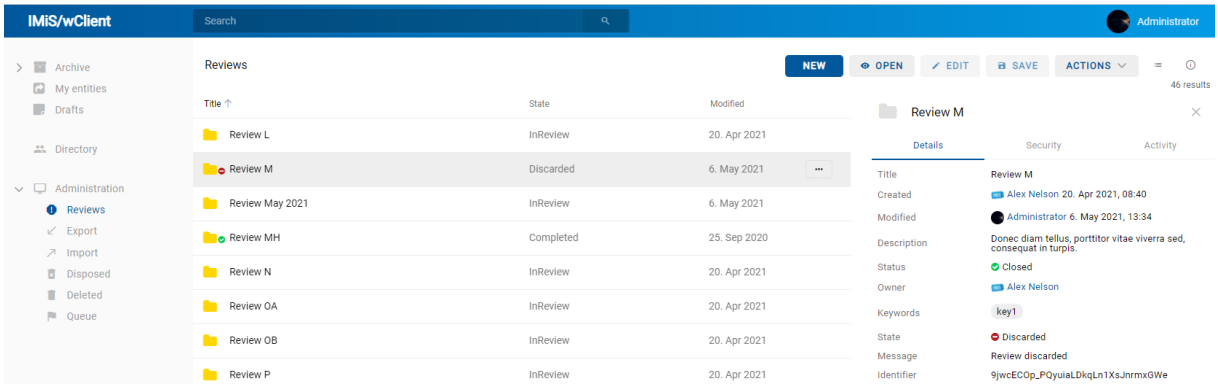

Image 368: A canceled decision-making phase

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.

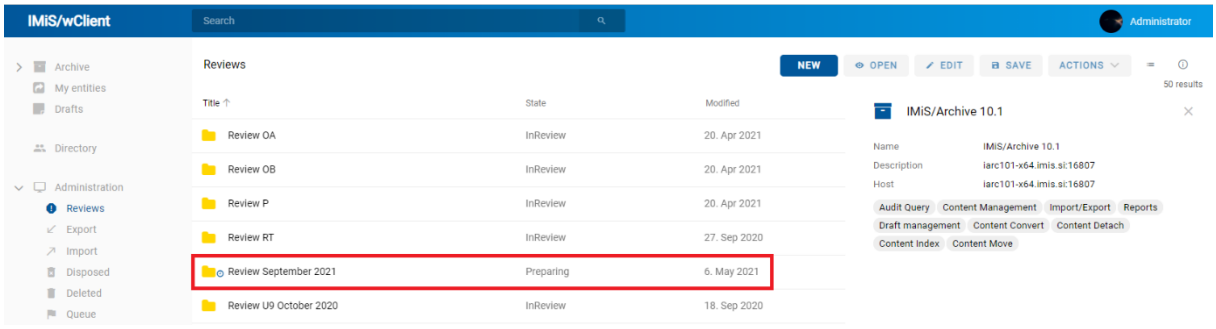

Image 369: Display of the review in the preparation phase in the Preparing state

Once IMiS®/ARChive Server finishes preparing a list of entities, the value of the State attribute changes to InReview. The preparation of a review is completed and awaits the decision-making phase.

The entity placed on the list remains on that list even if its retention period is modified after the list was prepared.

During the preparation phase of the review process an error can occur for various reasons. In the event of an error, the review process is automatically cancelled. Such a process does not contain entities on its list and cannot be prepared again. Such a list also cannot be edited.

The following attributes change their values:

- The value of the Status attribute changes to Closed.
- The value of the State attribute changes to Failed.
- The cause of the cancellation is recorded into the Message attribute.

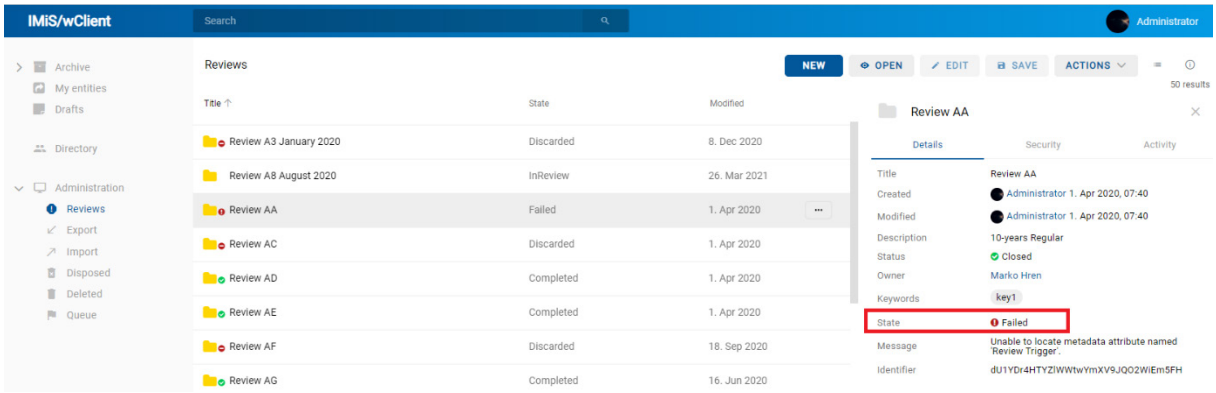

Image 370: Display of an error which occurred during the preparation phase of the review process

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.

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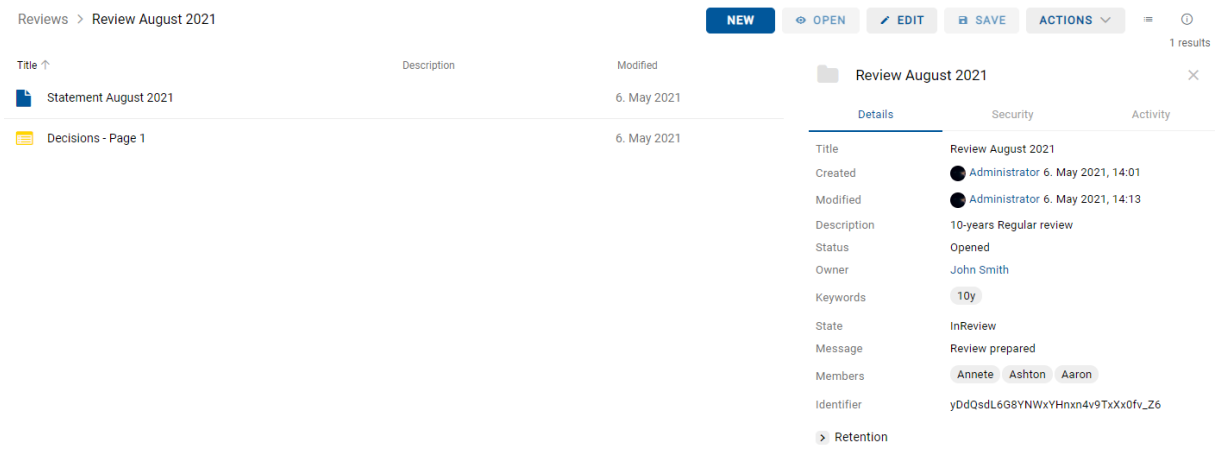

Image 371: Display of the review pages and documents

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.

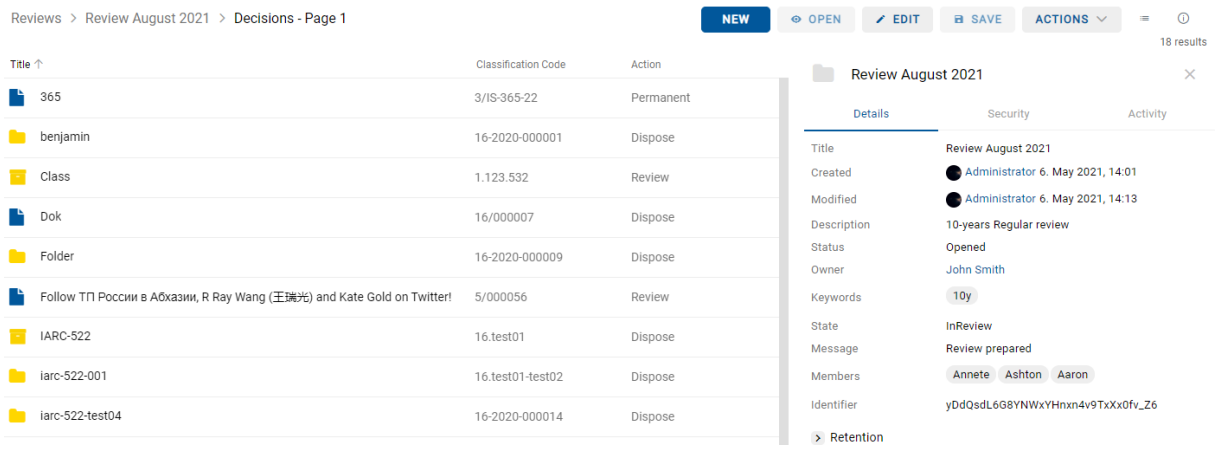

Image 372: A list of selected entities on a specific review page

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By selecting the icon in the right-hand command bar, the user can define which columns of the selected attributes will be shown on the list of selected entities in the central view.

The user can add or remove: Classification code, Action and Reason.

The column with "Entity titles" is always present.

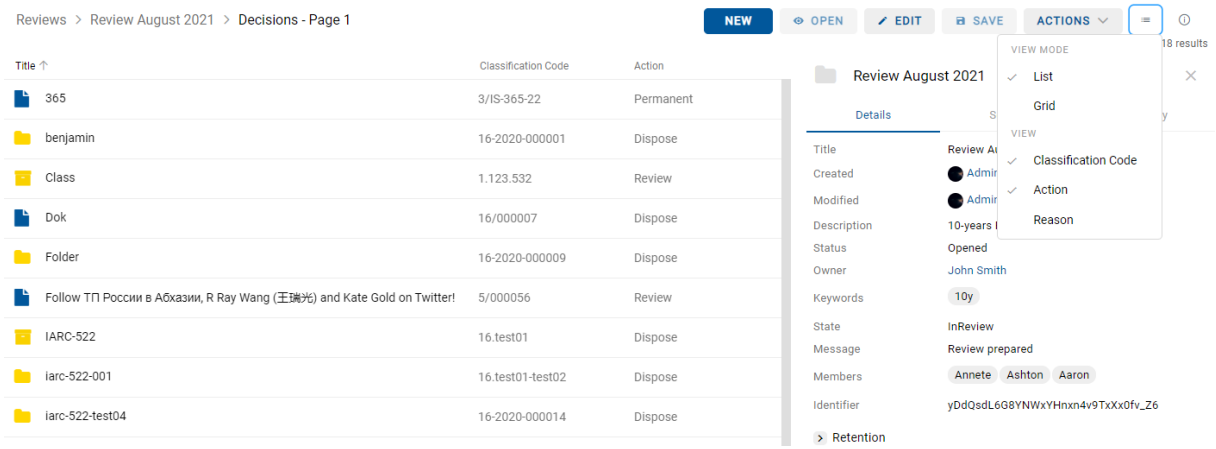

Image 373: Defining the columns of selected attributes in the popup menu

An entity on the list of an individual review page in the right view, has the following tabs:

- Details: a list of the metadata of the selected entity.
- Security: a review of the effective permissions of directory entities for the selected entity.
- Activity: audit log records for the selected entity.

By clicking on the Navigate to button in Details tab, the selected entity is shown in the classification scheme.

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

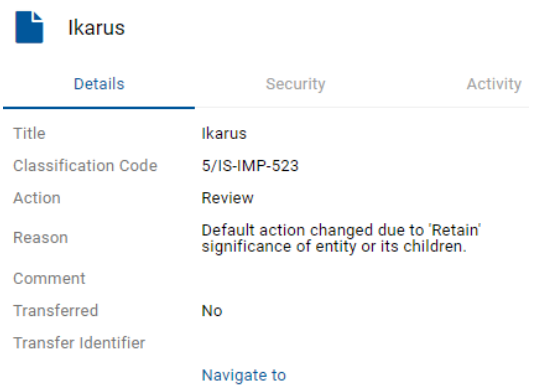

Image 374: Option of viewing an entity from the review

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.

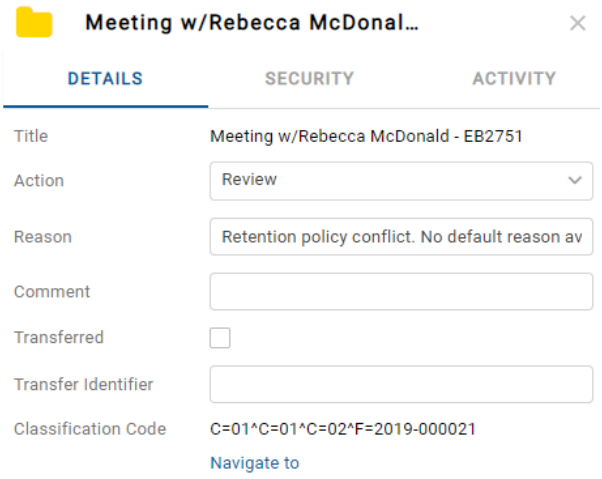

Image 375: Adding and modifying attribute values in editing mode

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.

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If team members decide that the actions of certain entities must be modified, they can perform one of the following actions in the central or right view:

- Dispose: the entity will be disposed of after the process is completed.
- Permanent: the entity will never again be selected in the review process. It has been marked for permanent retention.
- Review: an action which does not modify the entity's life span. The entity can be selected in the next transfer process.
- Transfer: after confirming the transfer and successfully completing the transfer process, the entity will be disposed of.

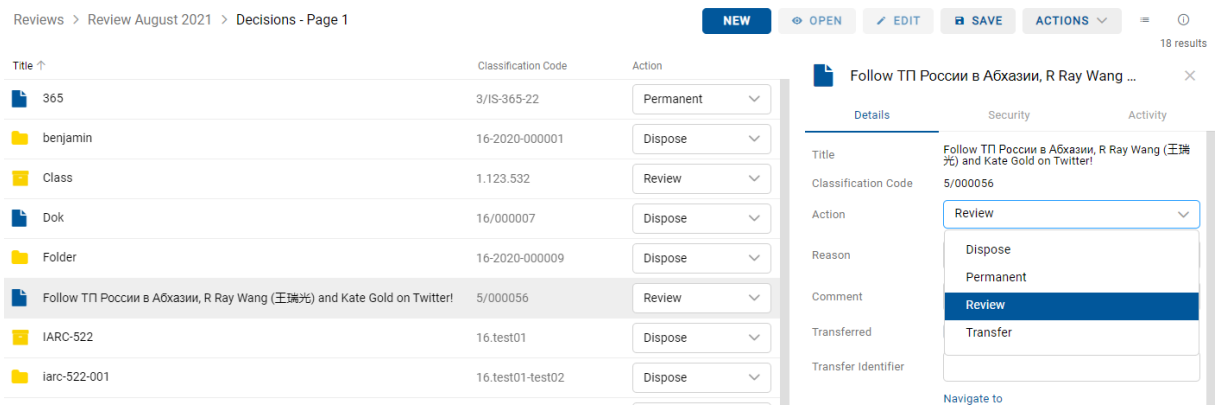

Image 376: Modifying the action of an entity in editing mode

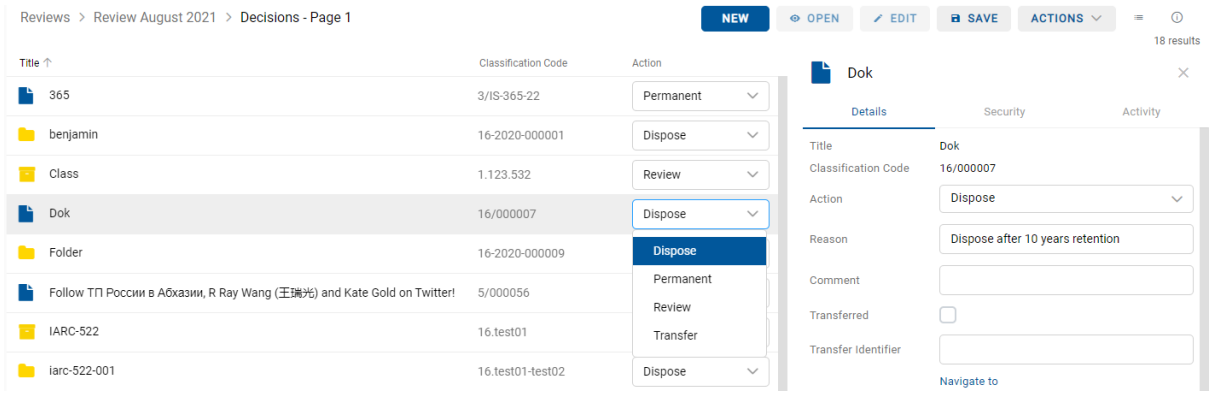

Image 377: Modifying the entity action in the central view

Note: The default value of the "Action" attribute can also be modified using the keyboard (Tab → next; Tab + Shift → previous; arrow keys for selecting the value in the popup menu).

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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.

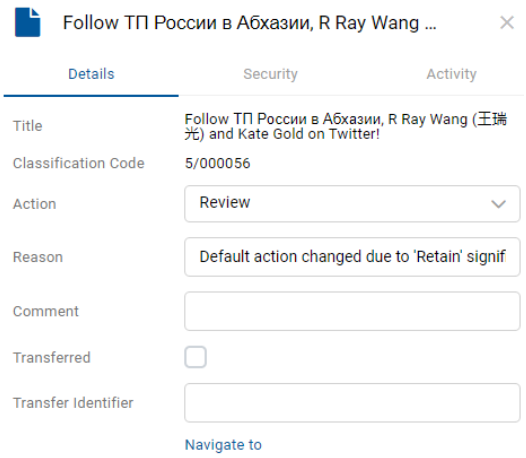

Image 378: Modifying attribute values in the review

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.

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Modifications of entities are not saved to IMiS®/ARChive Server until the user saves the review page. After saving, the list of reviews reappears. The team members can start working on the next review.

4.6.2.2 Canceling the decision-making process

The review process can be cancelled by team members selecting the Actions command and the Discard operation in the popup menu.

For more information on canceling the review process see chapter Canceling the review process.

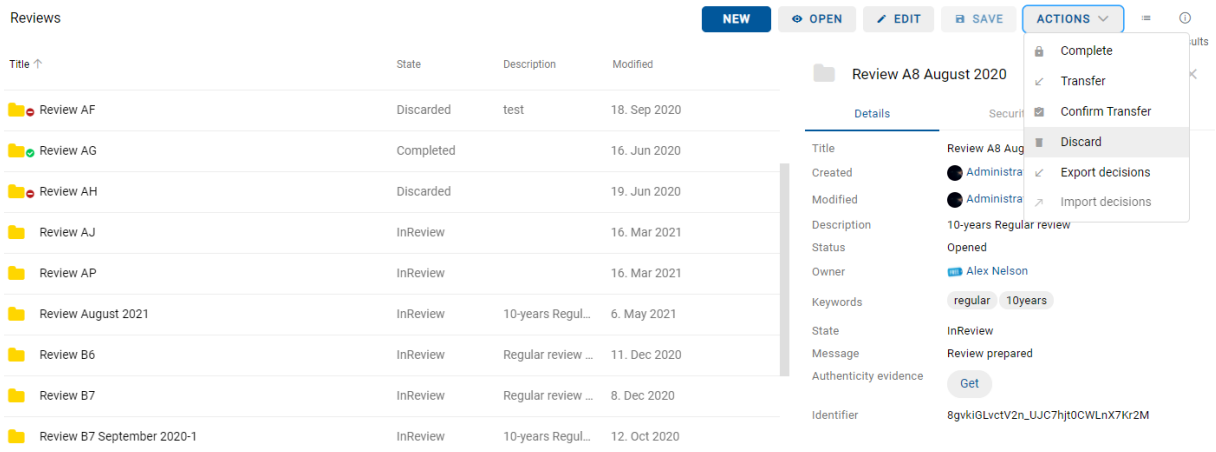

Image 379: Selecting the action "Export decisions" in the popup menu

4.6.2.3 Export decisions

Team members can review, edit and decide on decisions independently of the web client IMiS®/wClient. They can export decisions by selecting the "Actions" command in the command bar and the "Export decisions" action in the popup menu.

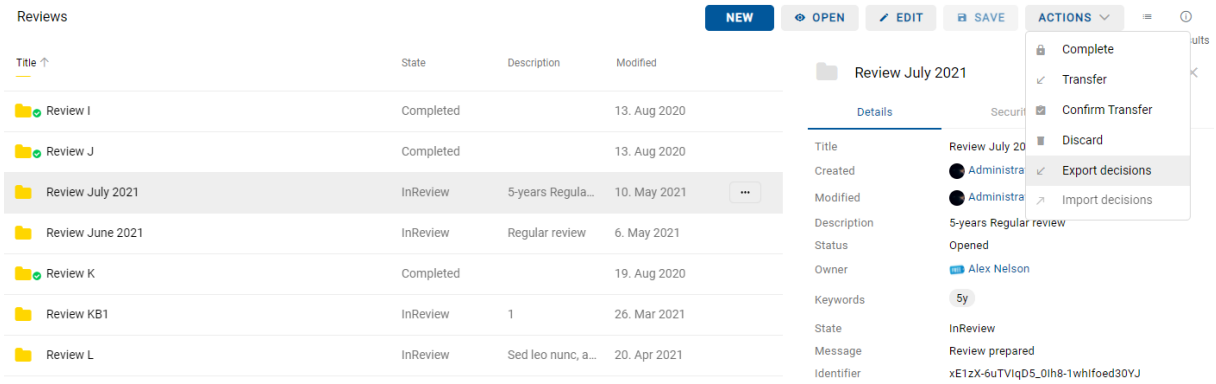

Image 380: Selecting the action "Export decisions" in the popup menu

In the dialog box they define the data on exporting decisions. They can choose between the file formats CSV and XML.

Image 381: Defining export data

After performing the action "Export", a notification is shown about exporting the file containing the decision to the relevant folder in the file system.

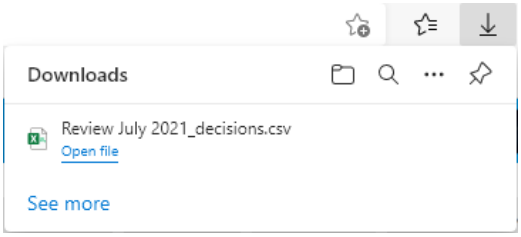

Image 382: Notification about exporting decisions

Image 383: File containing the decision in the file system

	A	B	C	D	E	F	G	H
1	ClassificationCode	Title	Actions	Action	Comment	Reason	Transferred	TransferId
2	C=14^C=669	ClassificationCodeTest02	Dispose,Permanent,Review,Transfer	Review		Default action changed due to 'Retain' significance of entity or its children.		
3	C=14^F=2020-000665	benjamin	Dispose,Permanent,Review,Transfer	Review		Default action changed due to 'Retain' significance of entity or its children.		
4	C=15^D=IS-527	Gibraltar	Dispose,Permanent,Review,Transfer	Transfer		Default action changed due to 'Retain' significance of entity or its children.	TRUE	7498596
5	C=3^D=IS-365-22	365	Permanent,Review	Permanent		Default action changed to 'Permanent' due to significance value of entity or its children.		
6	C=5^D=000056	Follow Đ˜Đź Đ ĐĪŃŃĐ¸Đ¸ Đ	Dispose,Permanent,Review,Transfer	Review		Default action changed due to 'Retain' significance of entity or its children.		
7	C=5^D=1	Patras	Dispose,Permanent,Review,Transfer	Review		Default action changed due to 'Retain' significance of entity or its children.		
8	C=5^D=IS-CONTENT-281	Versionable content	Dispose,Permanent,Review,Transfer	Transfer		Default action changed due to 'Retain' significance of entity or its children.	TRUE	7498596
9	C=8^D=000025	Conversion test Marko	Dispose,Permanent,Review,Transfer	Transfer	Manual transfer	Default action changed due to 'Retain' significance of entity or its children.	TRUE	7498596

Image 384: Before reviewing, editing and deciding independently of IMiS®/wClient

	A	B	C	D	E	F	G	H	I	J
1	ClassificationCode	Title	Actions	Action	Comment	Reason	Transferred	TransferId		
2	C=14^C=669	ClassificationCodeTest02	Dispose,Permanent,Review,Transfer	Review	Another Review needed	Default action remains.				
3	C=14^F=2020-000665	benjamin	Dispose,Permanent,Review,Transfer	Review	Another Review needed	Default action remains.				
4	C=15^D=IS-527	Gibraltar	Dispose,Permanent,Review,Transfer	Transfer	Transfer to another IS	Default action changed due to 'Transfer'.	TRUE	737475		
5	C=3^D=IS-365-22	365	Permanent,Review	Review	Another Review needed	Default action changed to 'Review'.				
6	C=5^D=000056	Follow Đ˜Đź Đ ĐĪŃŃĐ¸Đ¸ Đ	Dispose,Permanent,Review,Transfer	Review	Another Review needed	Default action remains.				
7	C=5^D=1	Patras	Dispose,Permanent,Review,Transfer	Review	Another Review needed	Default action remains.				
8	C=5^D=IS-CONTENT-281	Versionable content	Dispose,Permanent,Review,Transfer	Dispose	Obsolete	Default action changed to 'Dispose'.				
9	C=8^D=000025	Conversion test Marko	Dispose,Permanent,Review,Transfer	Dispose	Obsolete	Default action changed to 'Dispose'.				

Image 385: After reviewing, editing and deciding independently of IMiS®/wClient

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4.6.2.4 Import decisions

After reviewing, editing and deciding, team members can import a decision to the web client IMiS®/wClient. By selecting the relevant review and decision in Edit mode, they select the "Actions" command in the command bar and the action "Import decisions" in the popup menu.

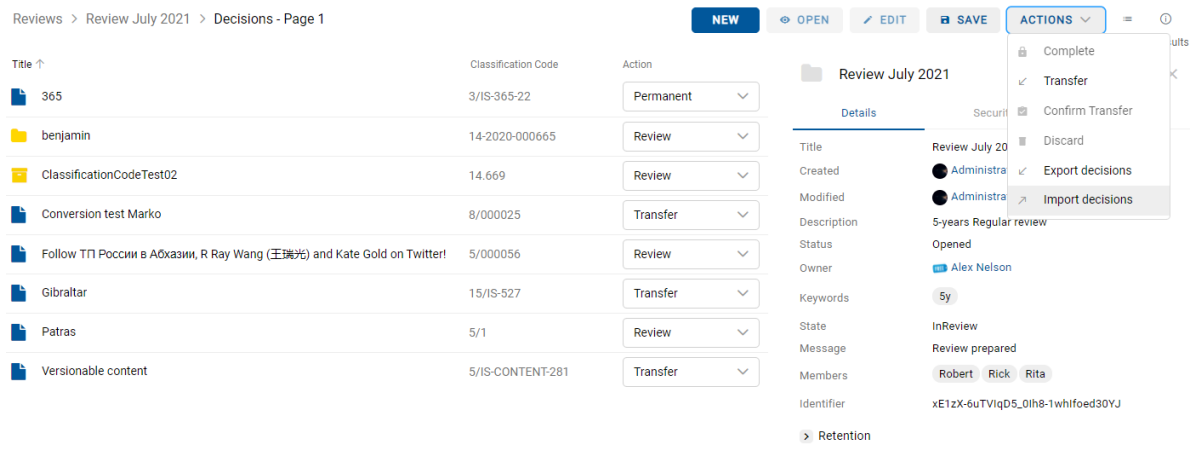

Image 386: Before selecting the action "Import decisions" in the popup menu

In the dialog box they select the file containing data on the decision.

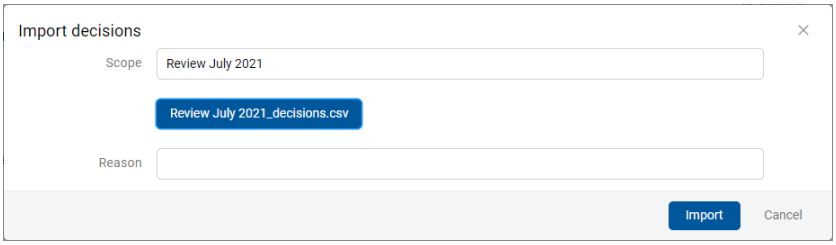

Image 387: Selecting a file for import

After performing the action "Import", a notification is shown about importing the file containing the decision to the relevant review.

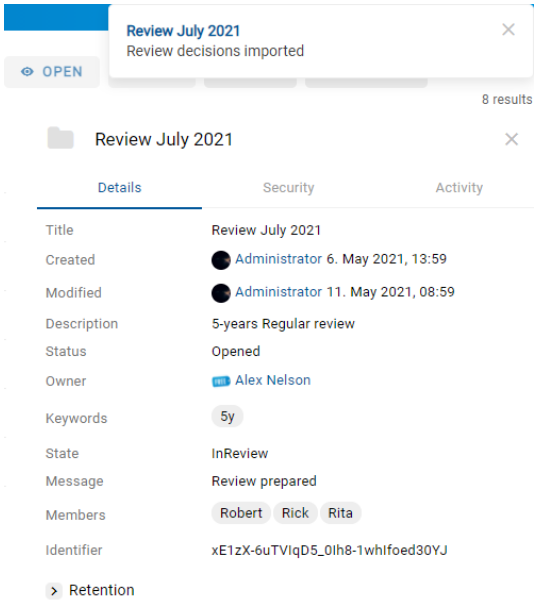

Image 388: Notification about importing decisions

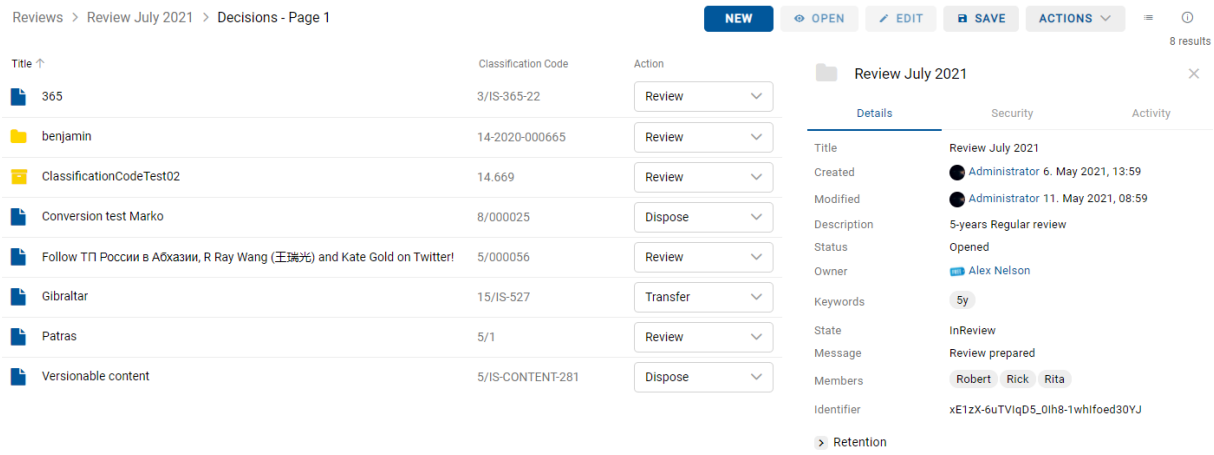

Image 389: After selecting the action "Import decisions" in the popup menu

After importing the decisions, team members save the review with the action "Save" in the command bar.

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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.

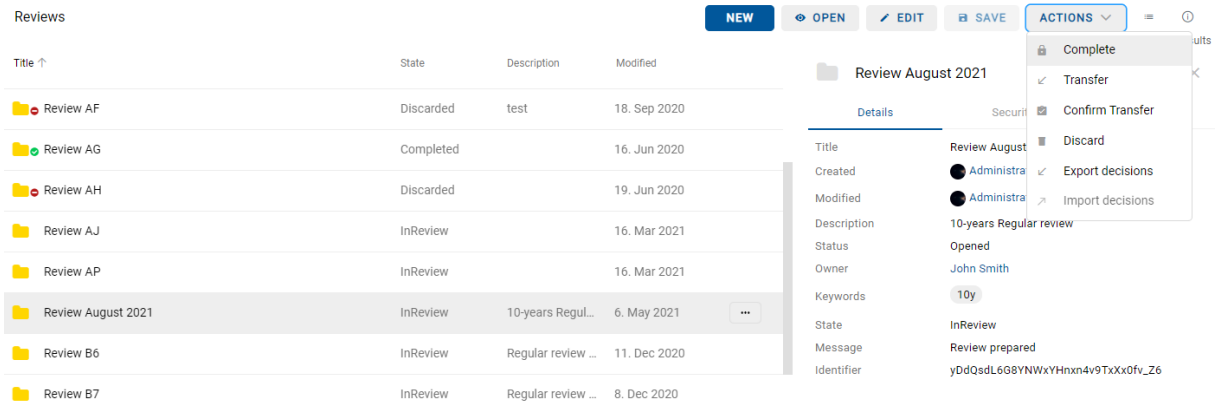

Image 390: Starting the process of completing the review

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

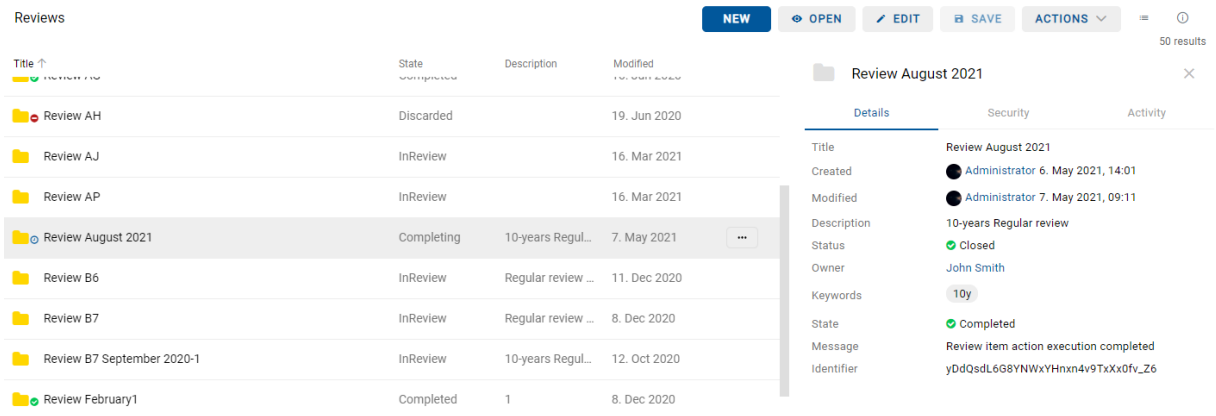

Image 391: During the process of completing the review

It automatically creates a review execute report on the implementation phase and files it among the review contents. For more information see chapter Reviewing and classifying documents.

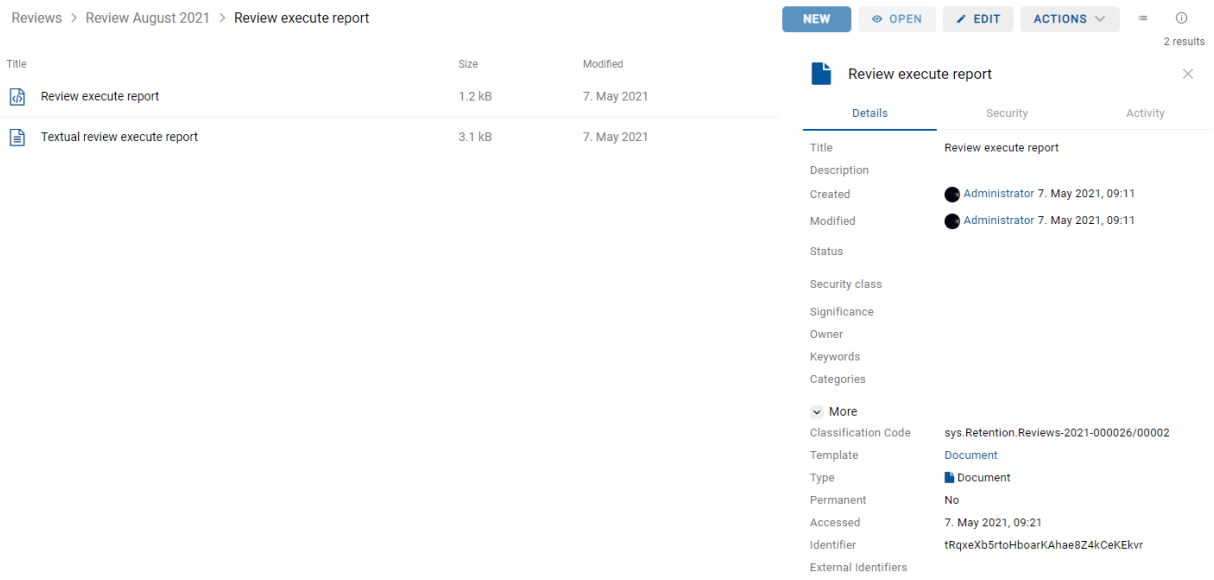

Image 392: Review execute report

This action completes the review process, which cannot be modified or implemented.
The value of the Status attribute changes to Closed and the value of the Stat« attribute to Completed.

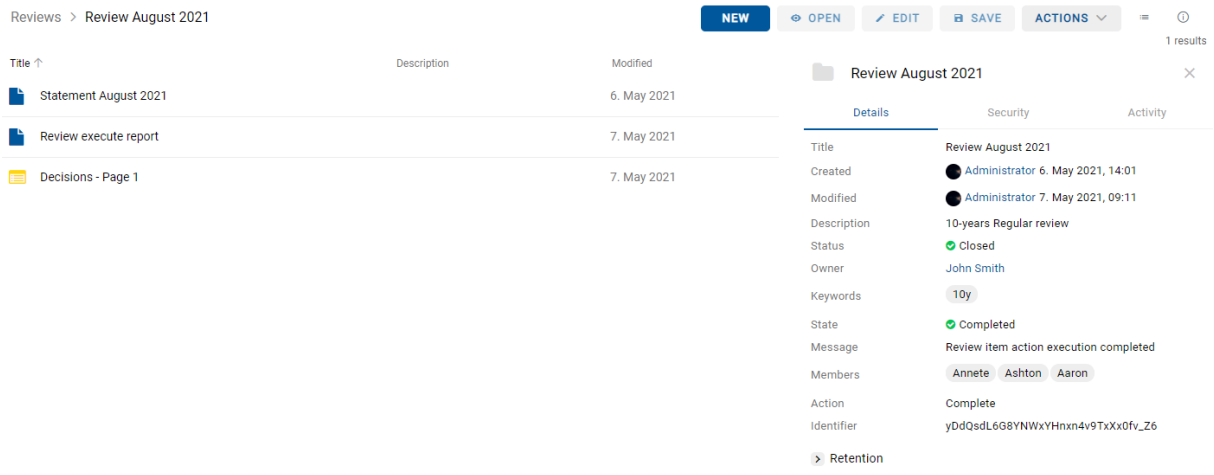

Image 393: Review completed

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.

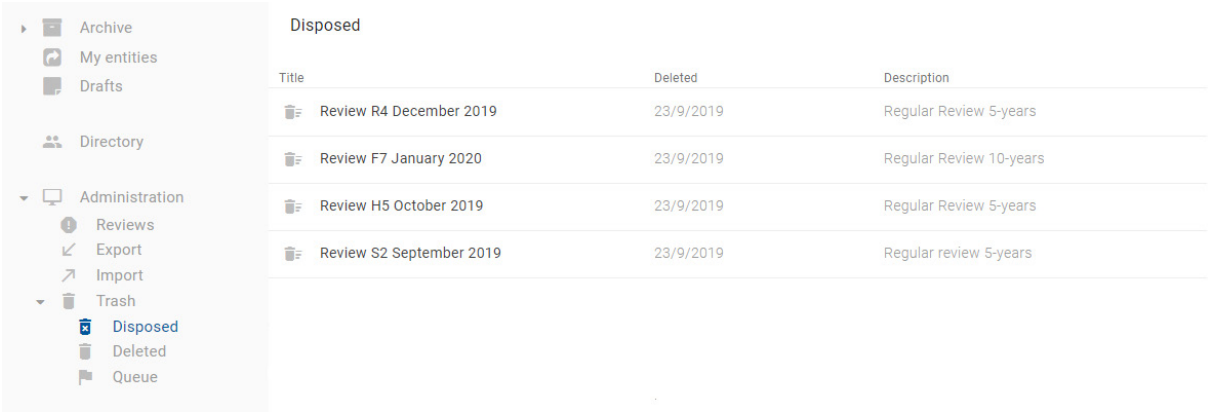

Image 394: A list of reviews with disposed entities in the review process

By selecting the Disposed folder, the central view shows all of the review processes during which at least one entity was disposed of. By clicking on an individual review page, a list of disposed entities appears, where the following entity information are shown only:

- Title: the title of the disposed entity.
- Classification code: the classification code of the disposed entity.
- Deleted: the date and time of deleting the entity from the archive server.
- Description: a description of the disposed entity.

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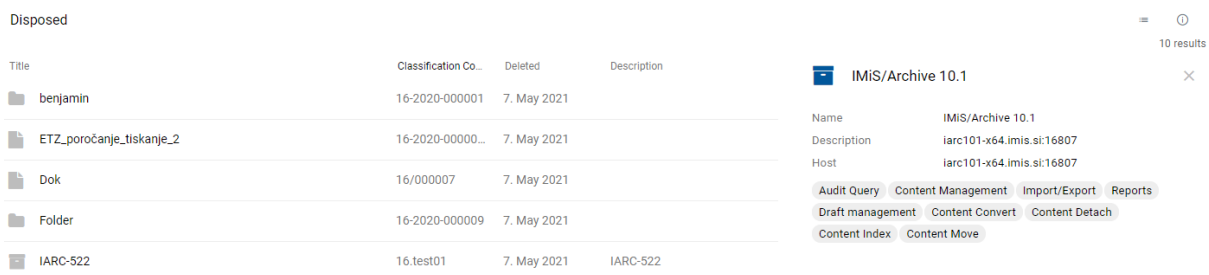

Image 395: A list of disposed entities on the review page

The Title, Classification code and Description of entity are the only attributes still preserved when an entity has been disposed of. All other entity metadata is erased and replaced with the following attributes:

- Reason: The reason for the disposition of the entity, which was entered by the user during the review process.
- Deleted: The date and time of the disposition of the entity.
- Identifier: Unique user identifier.

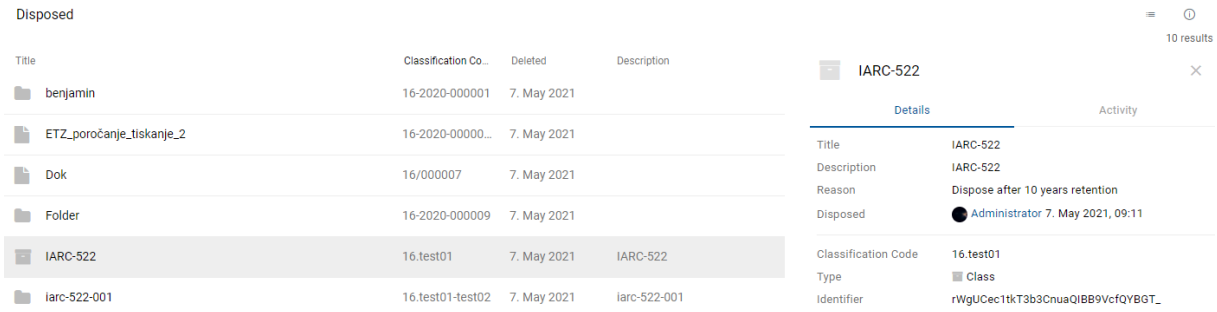

Image 396: Metadata of the deleted entity in the right view

4.6.5 Transfer of entities

If the review process was also intended for the transfer of entities from IMiS®/ARChive Server, this action must be executed prior to completing the process.

The transfer action is executed with two separate processes:

- Exporting from IMiS®/ARChive Server to the file system.
- Confirmation of the transfer of entities to a third archive.

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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.

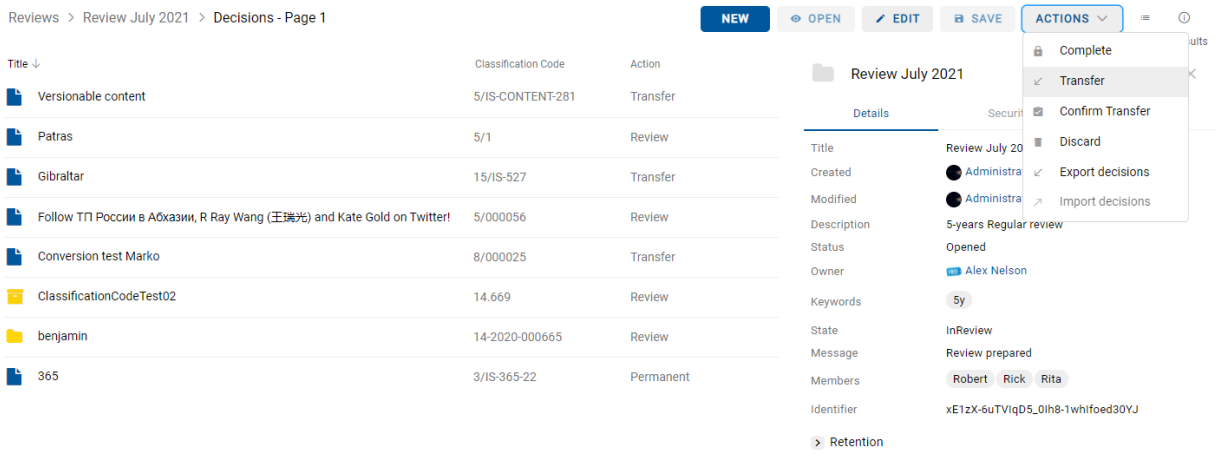

Image 397: Transfer of entities in the review process

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

Image 398: 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.

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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.

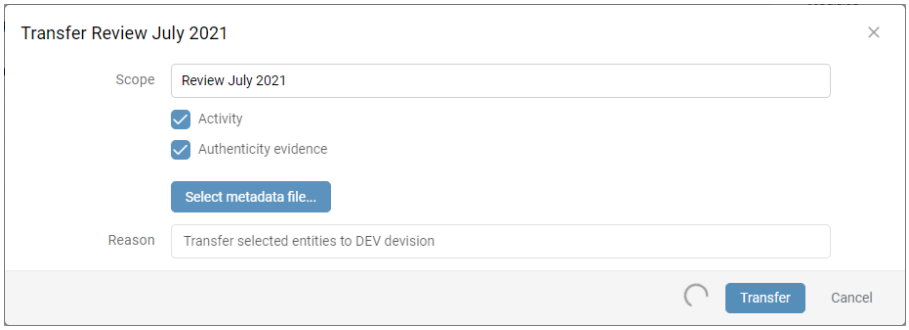

Image 399: Implementing the transfer process

The entities are exported in the XML format to the default directory Downloads. The user can access the transfer information from the notification bar by selecting the action Open file in the popup menu.

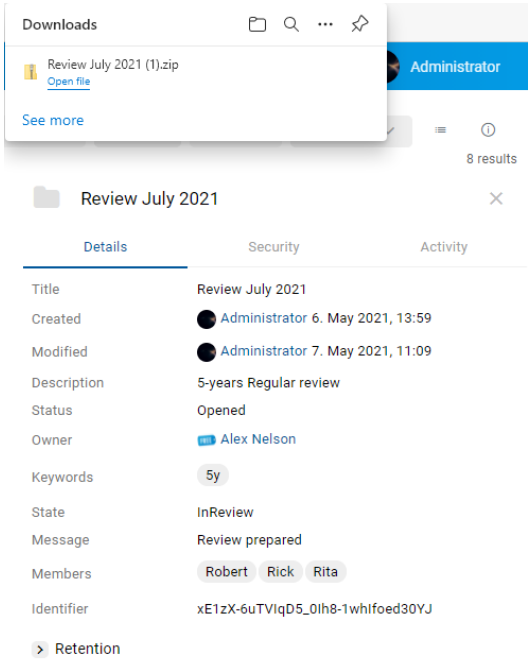

Image 400: Transfer notification

After confirming the selection Open file for the compressed (zip) file, the right view of Windows Explorer shows the export reports and the additional file for the automatic transfer confirmation TransferConfirmation.csv. With it the user of a third archive system can quickly specify which entities will be confirmed as successfully transferred.
For more information see chapter Format of confirmation file during transfer.

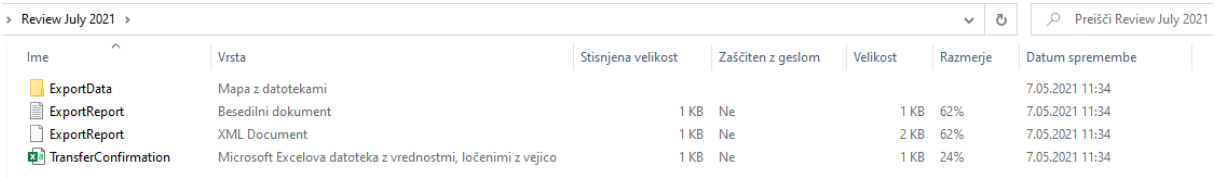

Image 401: Selecting the confirmation file

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

	A	B	C
1	ClassificationCode	Transfered	ReferenceId
2	C=15^D=IS-527	FALSE	
3	C=5^D=IS-CONTENT-281	FALSE	
4	C=8^D=000025	FALSE	

Image 402: Displaying the confirmation file

In the next step the team members can modify the value, which specifies whether the entity has been successfully transferred to a third archive system (FALSE → TRUE), and the reference to the entity transferred to the third archive system (transfer identifier; optional).

	A	B	C
1	ClassificationCode	Transfered	ReferenceId
2	C=15^D=IS-527	TRUE	7498596
3	C=5^D=IS-CONTENT-281	TRUE	7498596
4	C=8^D=000025	TRUE	7498596

Image 403: Confirmation of entities recorded in the confirmation file

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Team members select a suitable location for saving the modified confirmation file to the file system with the command Save as.

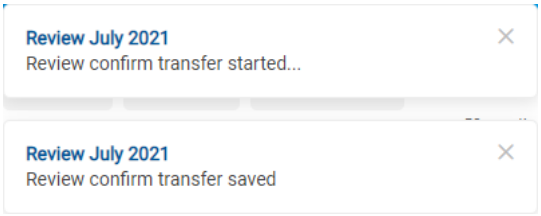

Image 404: Notification of saving the confirmation file

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.

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After the first transfer phase – export, a new entity is attached to the review contents – a transfer report.

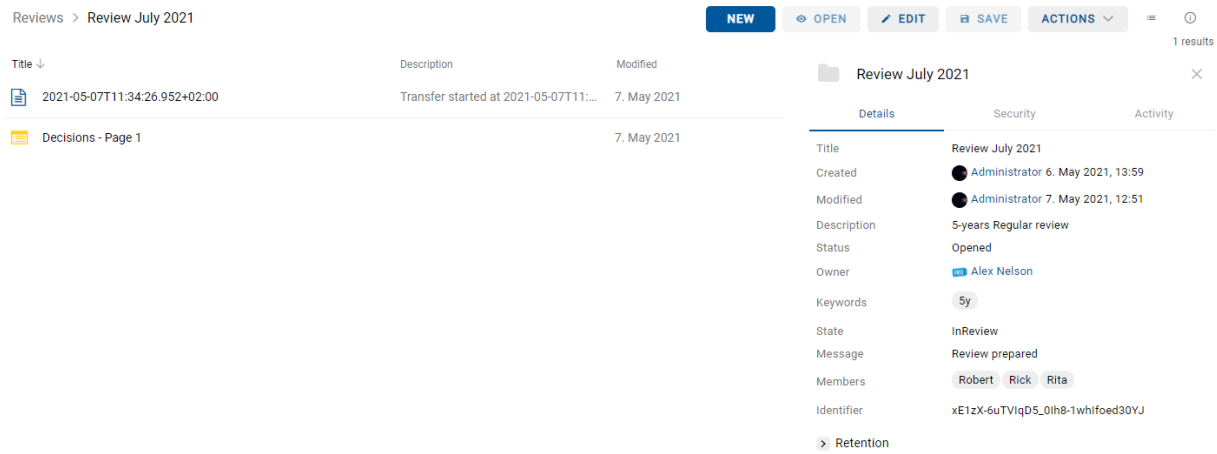

Image 405: A report on the transfer between review entities

The transfer report contains the following log files:

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

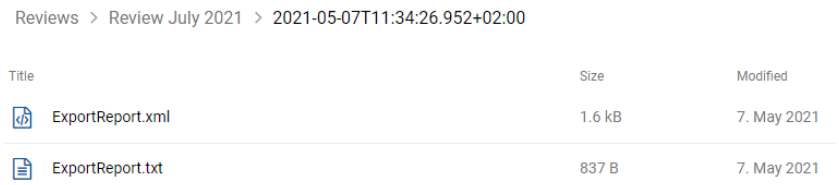

Image 406: Log files in the transfer report

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

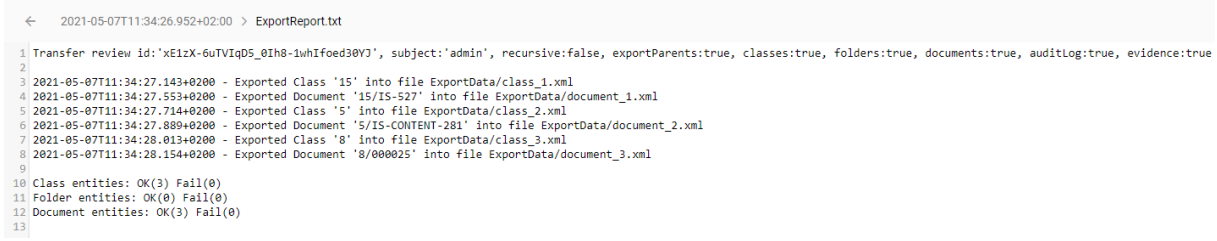

Image 407: An example of an ExportReport.txt report

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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.

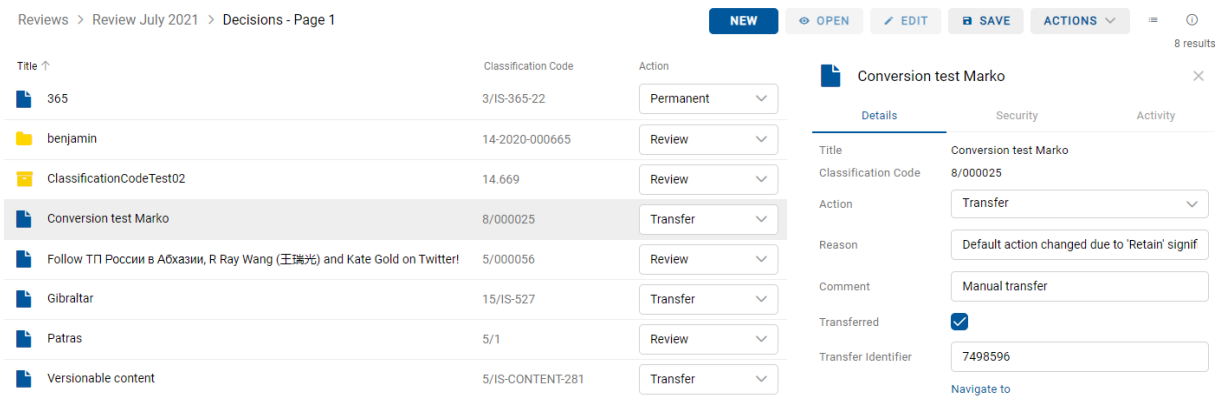

Image 408: Manual transfer confirmation for an individual entity

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Team members must specify for each entity on the list whether it has been transferred. They do so by ticking the box of the Transferred attribute.
If they wish, they can also enter a reference to the transferred entity by entering the value of the “Transfer identifier” attribute.

After completion the team members save all confirmations on the IMiS®/ARChive Server by selecting the Save command.

4.6.5.2.2 Automatic transfer confirmation

If there is a confirmation file from a third archive, team members use it for automatic confirmation of entity transfer. In the Reviews folder they select the review for which they wish the transfer confirmation to be executed. In the command bar they select the Actions command and the action Confirm transfer in the popup menu.

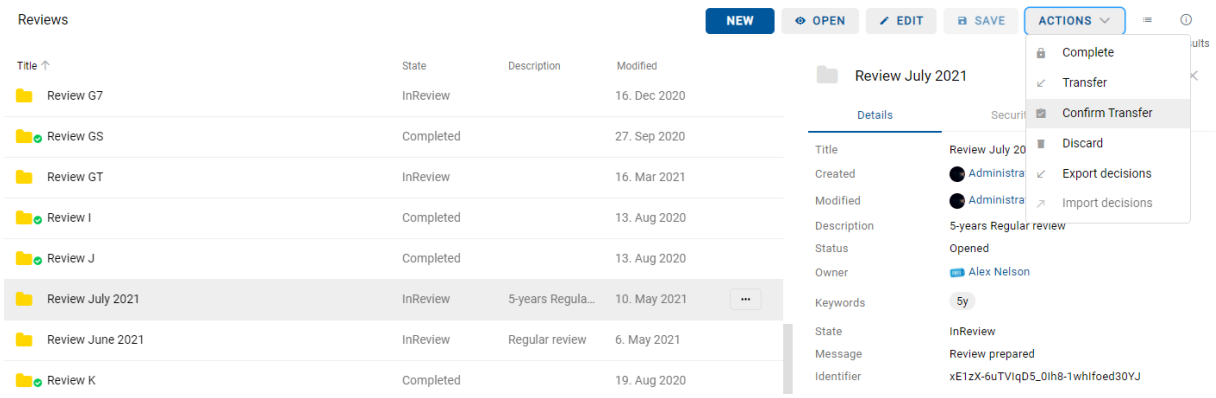

Image 409: Transfer confirmation using a confirmation file

After selecting the command, a dialog box appears for selecting the confirmation file.
They search for the desired file in the file system and confirm their selection with the Open command.

Image 410: 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.

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Team members confirm the selection of the confirmation file with Open or cancel it with the Cancel command.

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

4.6.6 Reviewing and classifying documents

An integral part of the review process is the reviewing and classifying of documents, created by team members.

4.6.6.1 Classifying documents

During the review process the team members have the option of adding documents to the review. They select the relevant review from a list and then using the New command in the popup menu they select Document.

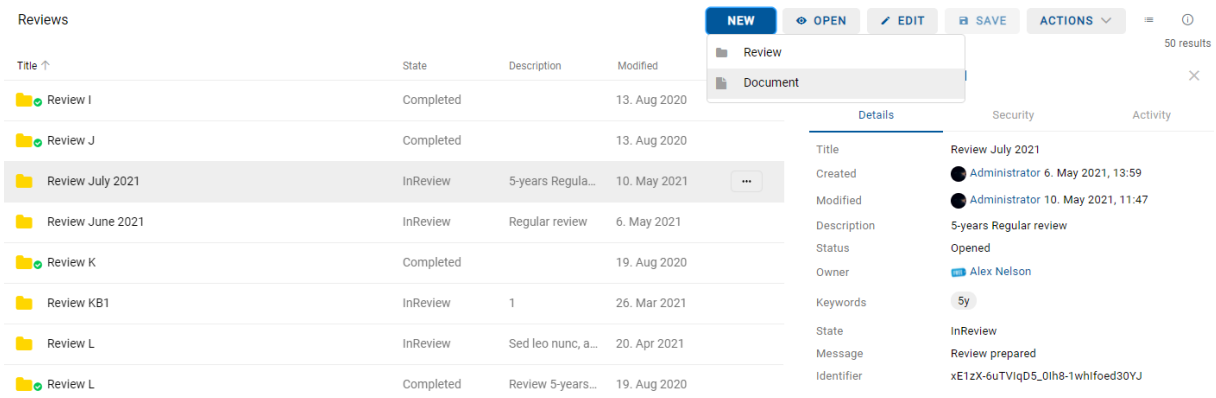

Image 411: Adding documents to the review

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.

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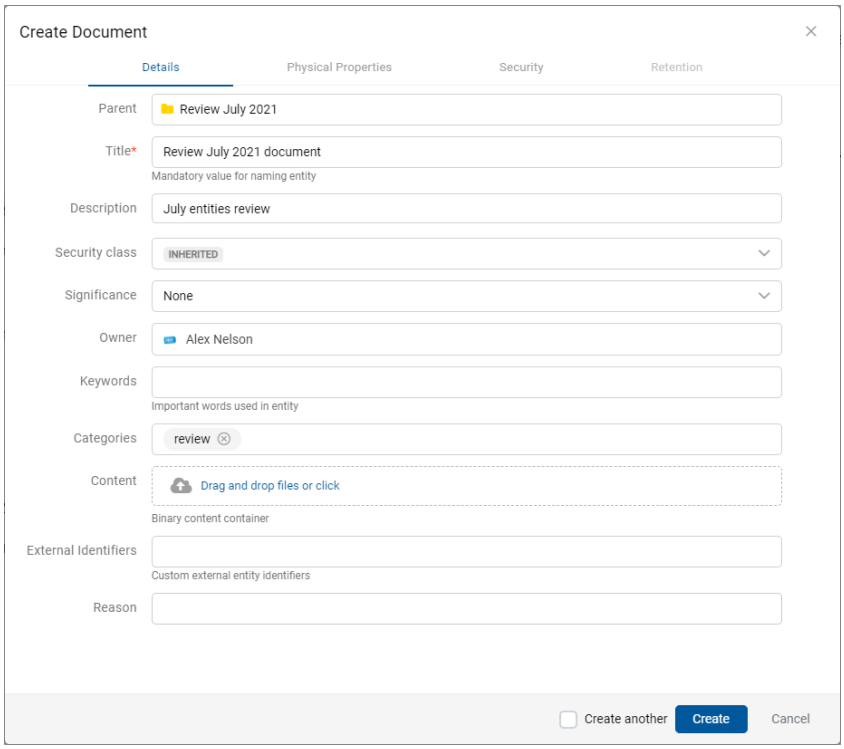

Image 412: Adding document metadata

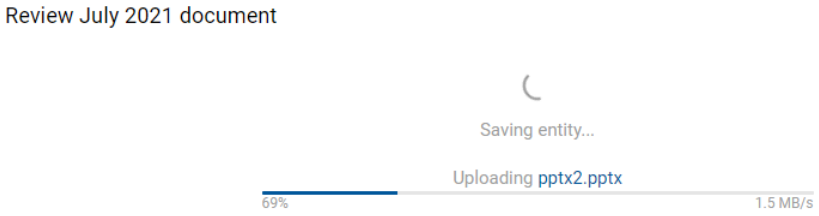

Image 413: Adding a document to the review

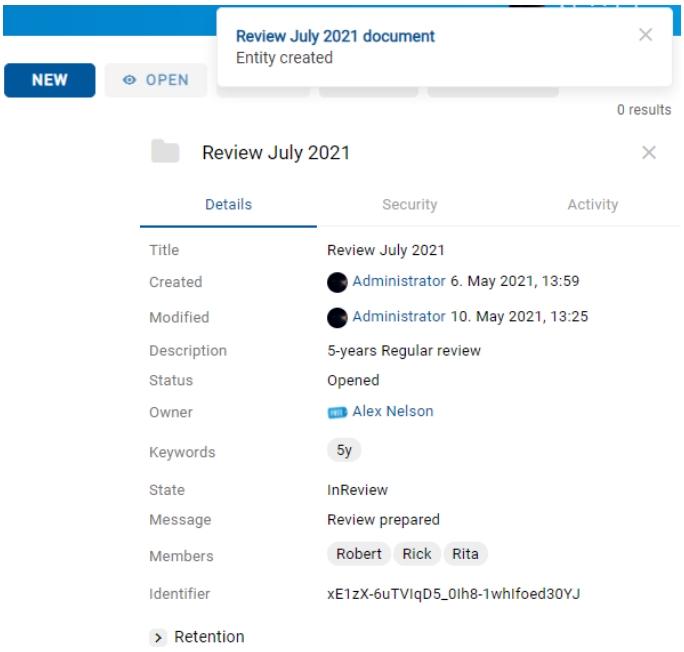

Image 414: Notification about a document added to the review

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.

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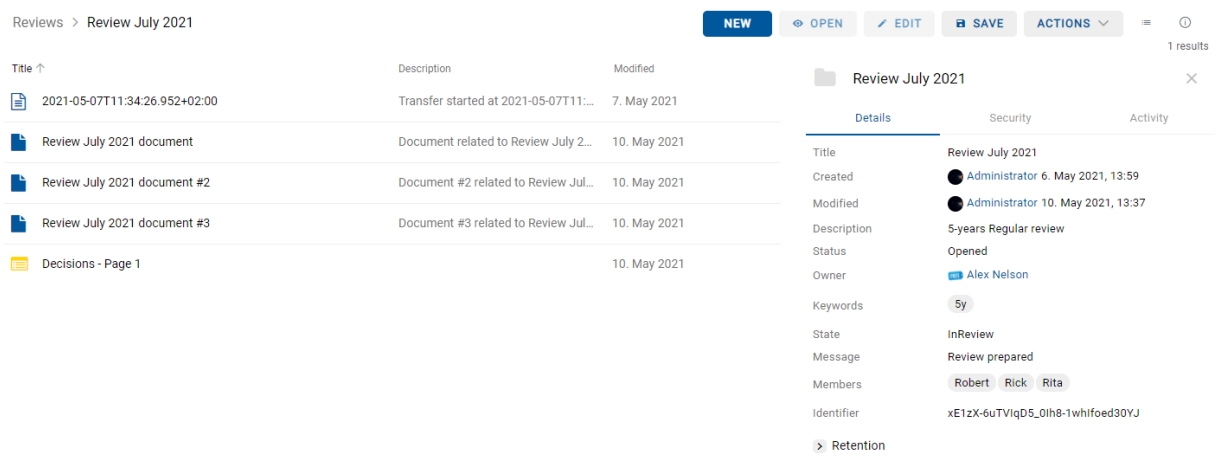

Image 415: Reviewing documents

Examples of classified contents:

- *Review execute report*
- *Transfer report*
- *Team minutes*
- *Attachment*
- *Custom document.*

By selecting the popup menu on the entity selected from the list, the team members have the option of performing various actions on the entity.

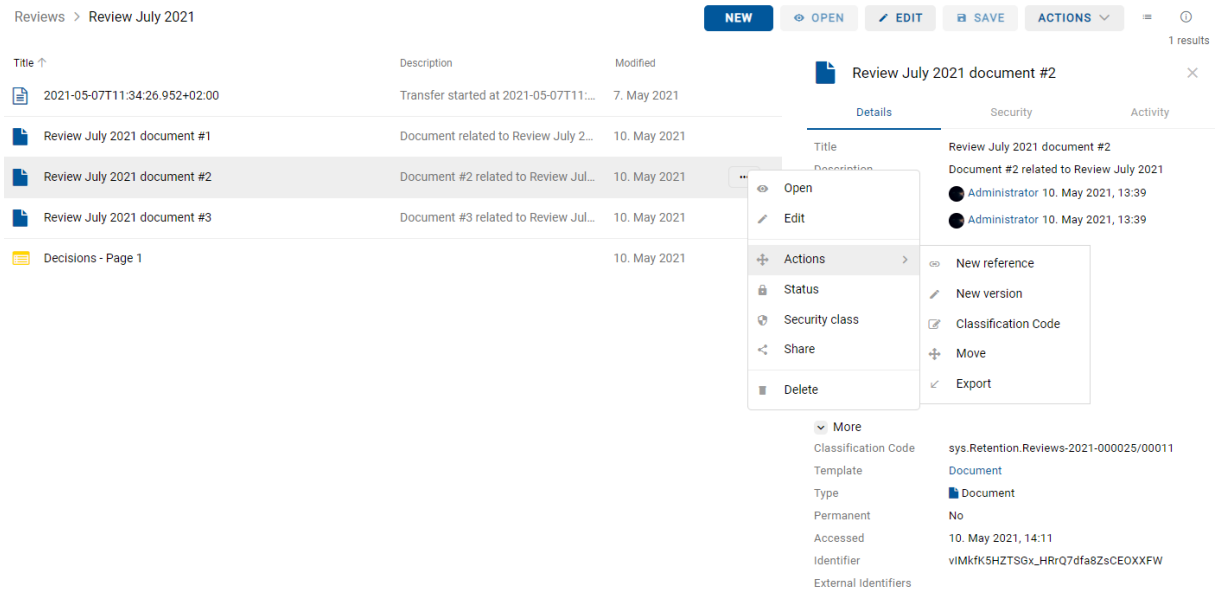

Image 416: Options of performing actions on entities

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).

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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).

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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).

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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 setttings.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 *ms* (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).

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search.maxElements	Integer	Maximum number of search results displayed. The user can change this value in the profile settings, where they also have the option to reset it to this value (optional).
search.hideFields	String []	Collection of fields which are hidden in the search dialog by default.
scan.apiKey	String	The key to accessing IMiS®/wScan (optional).
scan.url	String	The address of IMiS®/wScan (optional).
collections.maxSize	Integer	The maximum number for loading the collection. The user can change this value in the profile settings, where they also have the option to reset it to this value.
collections.displaySearchButton	Boolean	Specifies whether the button for showing the search dialog is displayed when the collection does not load.
collections.displayLoadButton	Boolean	Specifies whether the button for loading the collection is displayed when the collection does not load.
preview.word	String	Defines the URL to the Office Online service for previewing Word contents (optional).
preview.excel	String	Defines the URL to the Office Online service for previewing Excel contents (optional).
preview.powerpoint	String	Defines the URL to the Office Online service for previewing PowerPoint contents (optional).
preview.onenote	String	Defines the URL to the Office Online service for previewing OneNote contents (optional).

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.

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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.

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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.

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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.

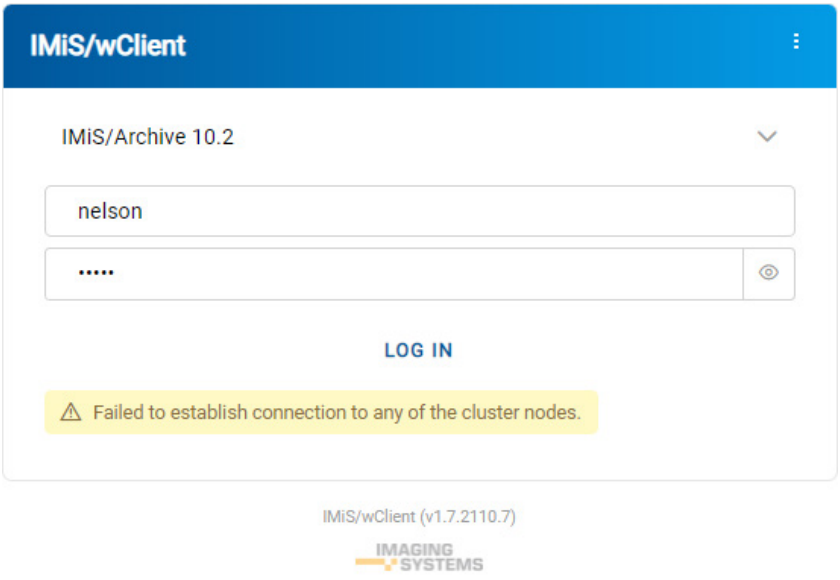

Image 417: An example of the error: Invalid or incorrect password

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.

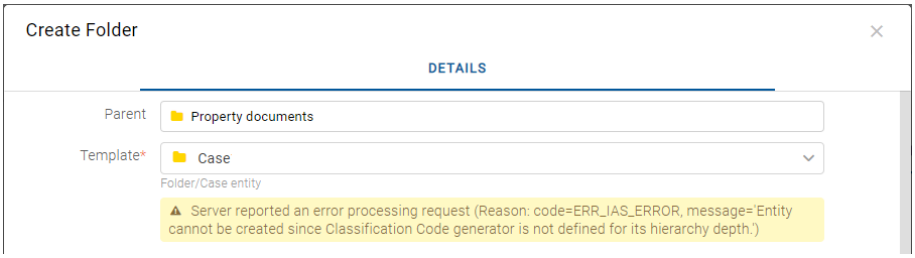

Image 418: An example of an error when saving a new folder

[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 419: An example of an error when opening an entity in editing mode

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Content scanning icon does not appear

Likely cause: Wrong key for accessing the IMiS®/Capture Service.

Solution: In the IMiS®/Capture Service settings check the suitability of the key in the "Security" tab. The service key value in the IMiS®/Capture Service settings must match the API key value in the user profile settings ("Profile / Settings") of the IMiS®/wClient.

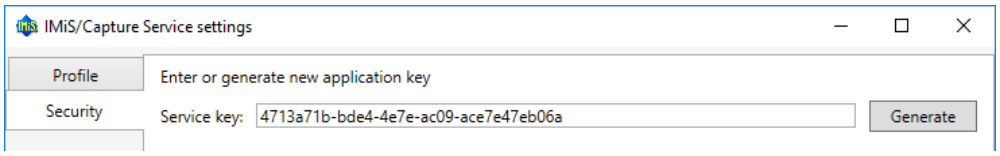

Image 420: Example of defining the service key