

OpenIMS® Open Information Management Server

OpenIMS®

Fast, Easy to use and  
On-demand  
A Content Platform from the  
21st Century



## Document Management Server Overview

# TABLE OF CONTENT

<b>1</b>	<b>INTRODUCTION</b> .....	<b>1</b>
<b>2</b>	<b>OVERVIEW</b> .....	<b>2</b>
<b>3</b>	<b>FUNCTIONAL SPECIFICATIONS</b> .....	<b>3</b>
	3.1 Scanning .....	3
	3.2 Storage & Archive .....	3
	3.3 Search & Query.....	5
	3.4 Share & View.....	5
<b>4</b>	<b>TECHNICAL SPECIFICATIONS</b> .....	<b>6</b>
	4.1 Operating system and webserver .....	6
	4.2 Hardware requirements.....	6
	4.3 Hosting .....	6
	4.4 Support service .....	6
<b>5</b>	<b>TRAINING</b> .....	<b>7</b>
<b>6</b>	<b>CONTACT</b> .....	<b>8</b>

# 1 INTRODUCTION

Open Information Management Server (OpenIMS®) is a server based solution which can be used for managing and maintaining unstructured information such as documents, letters, faxes, notes, tenders, policy pieces, minutes, drawings, e-mail, internet content and intranet content, within every organisation.

OpenIMS® consists of five server based products. These are :

- Portal Server (PS),
- Document Management Server (DMS),
- Content Management Server (DMS),
- Business Process Management Server (BPMS) and
- E-mail Management Server (EMS).

These products can, in combination, also be used for:

- Enterprise Content Management (ECM),
- Contract Management (CM),
- Knowledge Management (KM),
- Electronic Record Management (ERMS),
- Product Data Management (PDM, EDMS).

OpenIMS® is based on Open Source technology, is simple to use, easy to learn, fast to implement, has powerful functionality, is very fast and has low hardware requirements.

This document is an overview of OpenIMS® Document Management Server.

A demonstration of this product is available at: [www.openims.com/demo](http://www.openims.com/demo).

## 2 OVERVIEW

OpenIMS® - Document Management Server (DMS) – has a lot of functionality. It can be tailor made according to the wishes of any organisation. The list of standard functionality is continuously expanding.

- **Document management.** You can manage all kinds of files such as all Microsoft Office products, Adobe Illustrator, Photoshop, PageMaker, Acrobat (pdf), Autodesk AutoCAD, Microstation CAD, Corel Draw, WordPerfect, Paradox, Labview, Lotus 123, Tiff, JPG, BMP, Macromedia Director, Flash and a lot of other standard document types. OpenIMS® DMS is browser based and can therefore be used from any location. Version management, workflow management and security are an integral part of the product. OpenIMS® DMS is fully integrated with all open solutions for scanning (e.g. HP) and OCR (e.g. ScanSoft OmniPage).
- **Directory management.** You can manage directories, or other structures like projects, on the document server. You can manage things like structure, users, groups and access rights.
- **Users and groups.** With this module you can manage all users groups and the underlying users. A user group has certain rights within the OpenIMS® system. Examples of supported rights are: read, edit, publish and delete.
- **Search.** This functionality is used to find documents within the document management system. The search engine of OpenIMS® has similar facilities as the popular search engine Google. It searches full-text and/or in the metadata of the documents. Found search terms are marked within the results. It is also possible to define the ranking of the results.
- **Security.** With this functionality all sessions (connections to OpenIMS®) are protected. For example all passwords are stored encrypted (MD5 crypto hash). OpenIMS® can cooperate with security technology like SSL and VPN to provide for optimal security.
- **Template management.** With this functionality it is possible to manage document templates for easy and quick production of standard compliant documents such as contracts and proposals.
- **Audit trail (history).** OpenIMS® has excellent history management functionality. For each document it is possible to see who did what and when it was done with a certain document.
- **Workflow.** Each document is linked to a workflow profile in which certain users are allowed to perform certain tasks on the document. There is a webbased workflow designer to manage these workflows. Management of workflows will usually be performed by the application and/or system management department.
- **Development (Flex).** With this functionality IT professionals can extend the functionality of OpenIMS. For example the development of an interface with local CRM or ERP systems.
- **Multilingual.** By default the user interface of OpenIMS® is multilingual. Dutch and English language packages are included in the standard product.

See also the OpenIMS® website ([www.openims.com](http://www.openims.com)) and whitepapers for additional information.

## 3 FUNCTIONAL SPECIFICATIONS

### 3.1 Scanning

OpenIMS<sup>®</sup> does not limit your options in choosing a fitting scanning and/or OCR solution. It integrates with various standard scanning solutions. Scanning and converting documents by means of OCR and to process them is possible among other things with OmniPage; a solution which is supported by a lot of scan equipment.

#### Scan to PDF

OpenSesame ICT recommends usage of the pdf-on-text format for scanned documents. Each document will then be converted to the pdf format and be identical to the original, including signatures and drawings, while it can also be indexed by the OpenIMS<sup>®</sup> search engine so that full-text retrieval is available for each document.

#### Scanning users

Scanning is possible for users with rights to add documents to the OpenIMS<sup>®</sup> system and from any location where this access is granted.

### 3.2 Storage & Archive

#### 3.2.1 Indexing

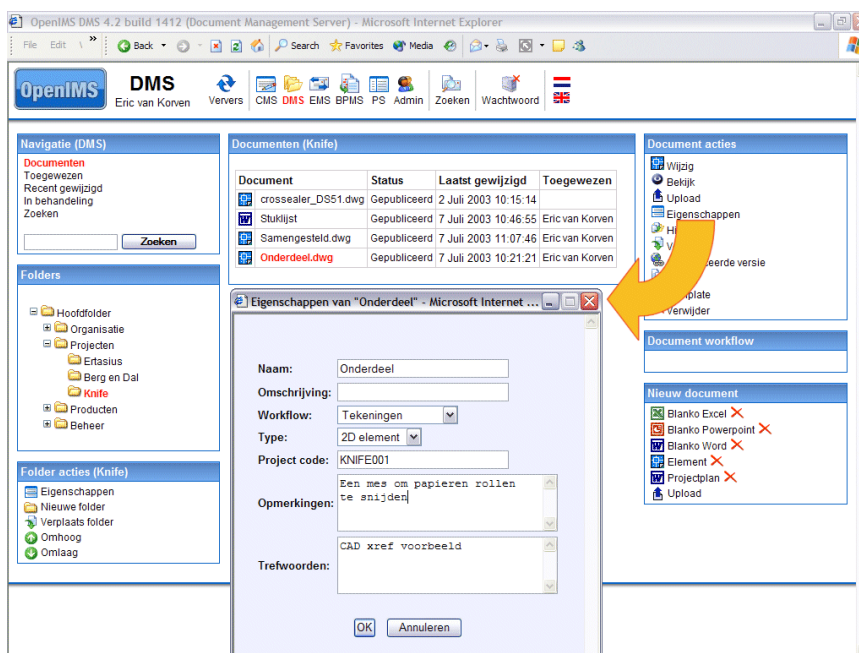
Each document within the OpenIMS<sup>®</sup> system can be provided with metadata, information which describes the information inside the document such as vessel name, location, reference numbers, trade, country, terminal et cetera.

The metadata can be managed with the metadata editor which is included in OpenIMS<sup>®</sup>.

The metadata also can be provided by other systems such as an ERP or CRM applications. In the properties dialog (see picture) the metadata can be viewed and edited by authorised users

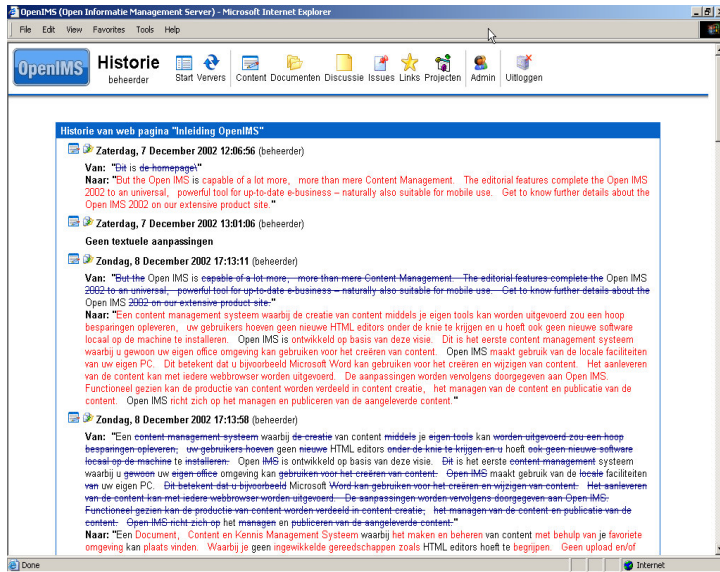
All documents are full-text indexed in real-time by the search engine. The metadata is also indexed in the same process.

This way documents can be found quickly by means of the metadata (for example all documents related to a certain vessel) and/or by text inside the document.



### 3.2.2 Document version control

OpenIMS® has excellent history functionality. For each document it is possible to see who did what and when they did it with a certain document. In the following picture you can see an overview of all changes made to a certain document.



It is also possible to view previous versions of a document and to reverse changes.

All documents can have version numbers which are configurable to match company standards.

All versions of documents are stored indefinitely unless specified otherwise.

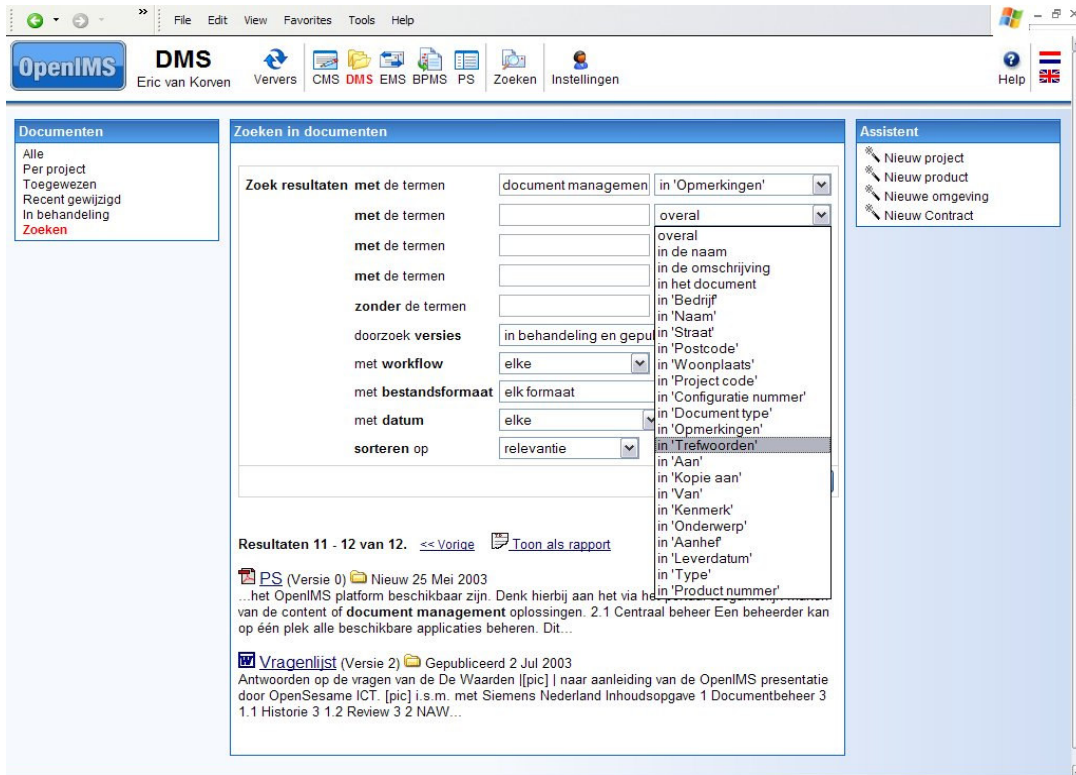
### 3.2.3 Filing period

Both rule based and manual configuration of a filing period is possible. By default the filing period is unlimited.

## 3.3 Search & Query

### 3.3.1 Search and retrieval keys

The full-text and meta search engine of OpenIMS® has similar facilities as the popular search engine Google. It searches full-text and/or in the metadata of the documents. When a document is placed in the DMS it is indexed instantly so it can be found seconds after it has been added (real-time indexing). Found search terms (simple and advanced search) are marked within the results. It is also possible to define weighing factors for ranking of the results. In the picture below the advanced search dialog is presented.



### 3.3.2 Multiple search queries

In the picture of paragraph 4.3.1. the advanced search dialog is shown. In that example a multiple search query is defined based on metadata. Since OpenIMS® is 100% webbrowser based it is possible to save search queries as favourite in your browser. This allows for re-use and sharing of search queries.

## 3.4 Share & View

### 3.4.1 Downloadable through export function

OpenIMS® DMS is a webbased document management system in which every document has his own secured (256 bits encrypted) hyperlink or URL. This hyperlink gives access to a certain document. The document can be downloaded and stored locally. Documents can be made accessible from every PC with an Internet connection.

### 3.4.2 Access control list

Authorisation is standard. Access is secured with a login id and password, which can be connected to a LDAP compliant directory service. Also unified logon is available. All sessions (connections to OpenIMS®) are protected. For example all passwords are stored encrypted (MD5 crypto hash). OpenIMS® can also cooperate with security technology such as SSL and VPN.

## 4 TECHNICAL SPECIFICATIONS

### 4.1 Operating system and webserver

#### Operating systems

OpenIMS® runs under Apache Webserver (version 1.3.28 or higher) which runs under Windows (NT, 2000, XP, 2003), Linux (Redhat, Suse), Apple, IBM AIX, HP/UX and Sun Solaris. Linux is the recommended platform for OpenIMS®.

#### Database platforms

Because OpenIMS® uses an integrated XML data store to store all information a database server is not required. Use of a database is optional. All common database servers are supported by OpenIMS®.

OpenIMS® works with sophisticated XML objects. These can be stored in Oracle, Microsoft SQL-Server, MySQL, Sybase and ODBC compliant databases.

#### Integration

OpenIMS® integrates, among other things, with SOAP, WebServices, (D)COM(+), Java, JSP, J2EE, XML, XSLT, ASP, PHP and Perl. For the Apache platform many standard components are available.

#### Customer platforms

OpenIMS® is 100% webbrowser based and can be used with many different Internet browsers.

### 4.2 Hardware requirements

OpenIMS® DMS is based upon Apache and requires the following minimum Linux server configuration: 1 GB RAM, 2 GHz processor and sufficient SCSI storage (preferably RAID). Example configuration:

Dell PowerEdge 600SC SCSI, Intel® Pentium® 4, 2.4GHz  
1 GB Memory  
2 x 73GB 10,000rpm Ultra 3 160 SCSI hard drive  
RAID 1 using a PERC 4/SC RAID Controller (32MB)

OpenSesame ICT assumes that backup equipment is already available.

### 4.3 Hosting

OpenIMS® is 100% web based so it can be hosted on any server and be made accessible from any PC with a webbrowser (LAN, WAN or regular Internet). Access is secured with a login id and password, which can be connected to a LDAP compliant directory service. Also unified logon is available. It is also possible to increase security by using SSL and/or VPN.

### 4.4 Support service

#### Standard support

Standard support consists of updates and technical support on the standard product. During the duration of the support contract the license holder is entitled to patches, updates, new versions and e-mail helpdesk support. Patches, updates and new versions are distributed by means of an Internet connection to our master server.

#### Service Level agreement (SLA)

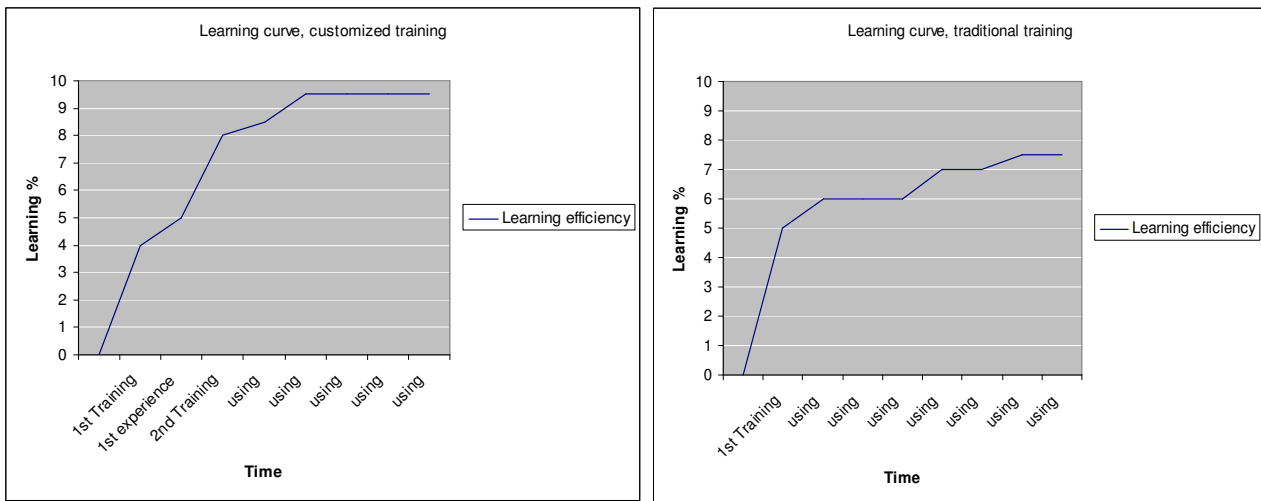
The standard support can be extended. In that case a Service Level Agreement (SLA) which describes addition support is made. The SLA defines which helpdesk support has been agreed upon (for example 8x5 or 24x7 support) and, if an ASP model is deployed, which availability is required.

# 5 TRAINING

For all users to work efficiently with the OpenIMS® DMS application they can receive training.

In order to achieve the best possible result the trainees will receive customised training. This training will simulate the real situation users can expect during their daily working routine. The goal of the training is to teach all trainees to learn to work with the application conforming their own working environment and procedures. This will result into a much more efficient training.

The first training will be 4 hours in week 1, this training will be continued for another 4 hours in week 2 (or later). The time in between can be used by trainees for self study and further familiarising with the application. This way the second training will be much more productive and interactive, resulting in a higher learning curve (see pictures).



### Pre-assessment

Based on our experience combined with unique characteristics of your organisation the training can be customised. There is also the possibility for differentiating based on trainees background, current function and/or experience.

### Study plan

A detailed study plan will be put together in the course of the project. Classes are minimal 6 – maximal 12 trainees. To train all 250 users an estimate of 50 training sessions of 4 hours will be needed, depending on availability of the trainees.

### Location

Location is at customer local offices. If a suitable trainings location is unavailable another location will be chosen.



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