Dokmee ECM 7

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1 Introduction

1.1 About Dokmee

What is Dokmee?

Dokmee Enterprise Content Manager, or simply Dokmee ECM, is a web-based software application developed by Office Gemini LLC that provides a variety of features to enable users to search, store, share, and digitize their business process.

Learning to use the software is intuitive assuming users are familiar with the concepts and functions presented in the Dokmee ECM User's Manual. All users should review the user guide document thoroughly before implementing the software into business processes.

This user guide provides an overview of the application's features and gives guidance for completing certain tasks and objectives.

1.2 Highlights

Highlights

- Dokmee offers support for multiple web browsers: Google Chrome, Microsoft Internet Explorer Edge, FireFox, and Safari.
- Dokmee offers a concurrent based licensing structure.
- Quick & Advanced Searching Options
- Unlimited File Cabinets & Folders
- Unlimited and Automatic Imports
- Integration with Microsoft Office 365
- Multi-Level Security Features
- Detailed Audit Logs

- Powerful Workflow Tool
- Organization & Retention
- Active Directory & ADFS Compatibility
- Document Version Control
- File Sharing & Collaboration
- Personalized Notifications
- Customizations
- Integrations with third party software vendor systems via API

1.3 Technical Assistance & Contacts

Contact Us

Online Form

Track Support Ticket

SysAid

Video Tutorials

To view videos on how to use Dokmee, click the button below and then select Dokmee.

Video Tutorials

Technical Support

support@dokmee.com

2 Installation & Configuration

2.1 Prerequisites

Before installation ensure all prerequisites are installed properly on the machine that will be hosting Dokmee ECM. Please refer to our document below as a reference to have your server and features ready for the
installation of Dokmee ECM.

DOKMEE ecm

SYSTEM SPECIFICATIONS

Enterprise – Version 7

Server Application	
CPU Requirements:	Minimum: 4 cores, 2.1GHz or higher Recommended: 8 cores, 2.1GHz or higher
Memory Requirements:	Minimum: 16GB of RAM Recommended: 32GB of RAM
Client Operating Systems:	Minimum: Windows 8.1 Recommended: Windows 10
Server Operating Systems:	Minimum: Windows Server 2012 Recommended: Windows Server 2016 or higher
Storage:	50GB and above (*this is subjective to the number of files being stored in ECM 7*)
Web Application	
Browser Requirements:	Microsoft Edge, Google Chrome, Firefox, Safari Recommended: Google Chrome
Memory Requirements:	Minimum: 8GB of RAM Recommended: 12GB of RAM
Mobile Application	
Required Components:	Dokmee ECM 7
Device OS Compatibility:	iOS 10 or higher Android 4.4 or higher
Microsoft SQL Server requirements	
Microsoft SQL 2016 SP1 or higher	Minimum: SQL Express 2016 SP1 or higher Recommended: SQL Standard 2016 SP1 or higher
Microsoft SQL Database Engine Collation	SQL_Latin1_General_CP1_CI_AI

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SYSTEM SPECIFICATIONS

Enterprise – Version 7

Server Application

Installation Prerequisites

Must be installed by a user with Administrative Rights.

Microsoft .NET 4.5

Microsoft SQL 2016 SP1 or higher.

- Must have Administrative access to install.
- SQL may have other requirements IIS 7 and up (Internet Information Services)
- .NET Framework 4.5 (includes .NET 2.0 and 3.0)
  - o Windows Communication Foundation HTTP Activation
  - o Windows Communication Foundation Non-HTTP Activation
- .NET Framework 4.5 Advanced Services
  - o ASP .NET 4.5
  - o WCF Services
    - HTTP Activation
    - TCP Port Sharing
- Internet Information Services
  - o Web Management Tools
    - IIS 6 Management Compatibility
      - ◊ IIS 6 Management Console
      - ◊ IIS Metabase and IIS 6 configuration compatibility
    - IIS Management Console
  - o World Wide Web Services
    - Application Development Features
      - ◊ NET Extensibility 3.5
      - ◊ .NET Extensibility 4.0 ASP

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SYSTEM SPECIFICATIONS

Enterprise – Version 7

◊ ASP .NET 3.5

◊ ASP.NET 4.5

◊ ISAPI Extensions

◊ ISAPI Filters

Common HTTP Features

◊ Default Document

◊ Static Content

Security

◊ Basic Authentication

◊ Request Filtering

◊ Windows Authentication

Repository Requirements

-Repository folder must be given Windows "Users" account with Modify rights

-If the repository folder needs to be restricted from a certain user account, that user must have at least modify rights to the contents of the folder

-In a Multi-User Dokmee environment, the repository folder must be shared out to everyone on the network. If a user account is created to log into the repository, these login credentials must be entered in the Repository settings of Dokmee.

Licensing

-Dokmee ECM requires an internet connection to activate licenses.

-If behind a proxy server of firewall blocking port 80, Dokmee will not be able to activate. Must open the connection for that computer or contact the Office Gemini support team to activate manually.

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2.2 Dokmee Installation

Dokmee ECM 7 supports Windows 64-bit Operating System with 64 bit machines.

How to Install the Dokmee Application

How to Install the Application:

Refer to the System Specifications for server pre-requisites, IIS components and MS SQL database requirements.

Ensure that the following server pre-requisites are met before running the Installer:

- Verify a supported version of Windows is installed (Various Windows 64-bit operating systems are supported).
- Install Internet Information Services (IIS) Features.
- Install MSSQL server for windows. Use MSSQL Server 2016 SP1 or higher.

Running the Dokmee ECM Installer

1. Download the installer from http://update.dokmee.com/DokmeeECM/DokmeeECM.exe.
2. Run the Dokmee installer as an administrator (Right click on the installer and select "Run as administrator").
3. On the language selection screen, select the desired language and click 'Ok'.
4. On the Welcome screen, click 'Next'.
5. Select 'I accept the terms in the License Agreement' and click 'Next'.
6. On the 'Destination Folder' screen select a desired destination path. The default and recommended path are: C:\Program Files\OfficeGemini\Dokmee ECM and click next.
7. After the installer is completed, Click 'Finish'.

Remarks:

- The installer automatically deploys the Dokmee Application to IIS and names it: "DokmeeECM" under the Default Web Site. If the installer does not add the

DokmeeECM Application to IIS, it must be added manually.

- IIS uses the following path to serve the Dokmee Application: C:\Program Files\Office Gemini\Dokmee ECM\webApp.
- The Dokmee ECM Installer also creates a 64-bit Application Pool in IIS named: DokmeeECMAppPool.
- The Installer deploys a multitude of services that are needed for Dokmee ECM to function with all its features.
- Windows Service Names: Dokmee ECM (Active Directory, Data Extraction, Email, Import, Notification, OCR, Recycle, Retention.

2.3 Getting Started Wizard

How to Configure Dokmee using the Getting Started Wizard

Complete the following steps after running the Dokmee installer and after the Dokmee Web Application is added to IIS. The Getting Started Wizard allows to configure the application by applying the license, configuring SQL, setting up the repository, configuring SMTP settings and Creating the Dokmee Admin Account.

1. Navigate to the Dokmee Getting Started wizard by using the URL configured in IIS. The URL may vary depending on the name given in IIS.

The default URLs are listed below:
- Internal Getting Started URLs samples: http://localhost/dokmeeecm or http://<IP>//dokmeeecm or http://<ComputerName>/dokmeeecm.
- External Getting Started URLs sample: https://www.<DomainName.com>/dokmeeecm.

Remark: If the Connections settings are missing, upon entering http://localhost/dokmeeecm the application will redirect to http://localhost/dokmeeecm/gettingstarted.

2. Welcome: Select the desired language and click "Setup".
3. Licensing: Enter a Permanent or Offline License key.

Remarks:
<u>Permanent keys:</u> Can be obtained from a sales representative; Prices vary depending on the modules and number of users.
<u>Trial keys:</u> Can be obtained by contacting a sales representative to request a trial key.
<u>Offline keys:</u> Do not require an internet connection to be activated. To obtain an offline key

the user must buy a permanent key and then convert it to an offline key by requesting it from support at support@dokmee.com. This request will be sent for approval before an offline key is generated.

4. SQL: Enter the server's name (e.g., localhost or localhost,1433), Enter MS SQL database name, username and password. We recommend using the Default Database Name. (The database account being used to create connection must have proper ownership/rights to SQL.)

5. Repository: Enter the path of the repository. The repository can be located locally or in another Computer/Server.

- Local path E.g., C:\DokmeeRepository
- Network path. E.g., \\<computeName or IP>\\DokmeeRepository

Remark: Use "Login Required" if the repository path requires to be accessed ONLY by a particular windows user.

6. SMTP Optional: Select an Email SMTP server from the drop down or enter the email SMTP settings; Notice that the SMTP settings can be skipped and updated at a later time.

- Mail Server (SMTP) – When users select the mail server form the dropdown the default settings get automatically populated.
- Port Number
- Email Address
- Password
- Select/Unselect "Use SSL"

Remark: Notice that the Email SMTP settings mentioned here are global SMTP settings.

7. Account: Enter the following Administrator information:

- Username
- Password (Confirmation is required)

8. Complete: On the Complete window, click "Sign in" to navigate to the Dokmee Login Screen.

9. Sign in using the Administrator Account created in step 7.

10. After signing in to the Dokmee Web Application, completing the following steps to get set up quickly is recommended:

1. Create at least one File Cabinet: Click here to learn how to create a File Cabinet.
2. Upload a document. Click here to learn how to upload a document.
3. Index a Document. Click here to learn how to Index Document from the upload module or Click here how to Index a document that is already in the system.
4. Create Role(s)and/or User (s): Click here to learn how to create Roles/Users.

Remarks: It is highly recommended to use an SSL certificate in IIS to secure the communication between the Browser Client and the Server.

2.4 License

To activate a permanent license on a server, the server must have an internet connection. An Offline Key can also be activated upon request and approval via support ticket creation at support@dokmee.com

How to Activate a Dokmee ECM License

- The license key can be activated during the initial Getting Started setup wizard.

Changing a License

To change license keys (Must have internet connection to activate a permanent license):

1. Log into Dokmee ECM Web Client.
2. Click "Configurations" then click "Licensing".
3. Click the Deactivate button next to the active license.
4. Copy and Paste the new license into the "License Key" text box.
5. Click "Activate".

How to View the License Agreement

Click here to view the License Agreement.

3 How to Use: Tour/Guide

3.1 Sign In

3.1.1 Sign In

Once you have completed your installation, the first page that you will see is the login page. There, you will add your recently created username and password to access the platform. Only users with a valid credentials can access the system.

How to Login to Dokmee

1. Open a web browser and enter the configured Dokmee ECM URL.

2. Enter the Username and Password

3. Click 'Sign-In' Note: If you select the Remember Me option, the system will keep the latest user ID added to the Sign In page.

Note: It is possible to customize the logo at the login page on the configurations (Theme within the software.

How to Recover Forgotten Password

If the user has forgotten their password, it is possible to retrieve it with the following:

1. From the Sign In screen, click the "Forgot password?" hyperlink
2. Type in Username and Email Address
3. Click 'Ok' A temporary password will be sent to the email associated to the User

Note: SMTP settings need to be configured in order to receive the email sent by the forgot password wizard.

How to Change Password

Users can change their password at any time once logged into the system.

Steps to change password while logged in:

1. After your login, at the top right of the main screen, click the User Profile logo to the right of the user's name and from the 'User Settings', click on 'My Profile.'
2. Click 'Change Password'
3. Type in the old/current password
4. Type in a new password
5. Click 'Save'

3.2 Dashboard

3.2.1 Dashboard

Upon logging into Dokmee ECM, users will be brought to the Dashboard. From the Dashboard, users will have direct access to the most frequently used functions within Dokmee ECM, as well as customizable information about your system. Users can add or remove widgets and reposition them by dragging and dropping the widgets based on preferences.

How to Add and Remove Widgets

1. Above the Dashboard widgets, users will see a Dashboard tab with a Dashboard icon resembling four squares.
2. Click on this icon to prompt a new window on the right-side listing all the available widgets.
3. From this list, users can use the check boxes to add or remove the following widgets: Cabinets, Favorites, Recent Files, My Activity, and Notifications.
4. Once users select the preferred Dashboard widgets to display, click on "Save" in the bottom right.

How to Arrange Widgets

The widget's settings are configured based on each user’s preferences; By logging in to a different user account, the widget settings may be changed based on the configured settings for the logged in user. To rearrange your widgets, users click on them to drag and drop them into the desired location. This will automatically shift other widgets to accommodate the change.

What types of Widgets are Available

Dokmee ECM has 5 different widgets that users can customize to easily access distinct functions within the application. The widgets available are Cabinets, Favorites, Recent Files, Notifications, and My Activity

Cabinets
The Cabinets widget displays the list of File Cabinets that the user has access to. This widget displays the name of the file cabinet, the number of files stored (excluding the files in the recycle bin), and the storage size in Megabyte (MB) of the entire File Cabinet. The refresh button at the top right corner will update any changes in the information displayed in this section. Users can navigate to their file cabinets using the scroll bar and the arrows found to the right and towards the bottom of the widget. With a single click, users can open the selected File Cabinet.

Favorites
The Favorites widget displays all the files in the selected cabinet that are in the Favorites folder. These can be organized and displayed by cabinets that the user has access to. Users can mark a document as a favorite directly from the main file repository, as well as from a dynamic folder. Once users access the file location, they can select one or multiples files to favorite. Once the desired files are highlighted, click the ellipses menu to the right of the file to access the Favorites function.

Recent Files
The Recent Files widget displays the most recently accessed documents by the user. The

most recently accessed documents will be presented at the top of the list with the filename, cabinet name, date and time of the user's last access.

My Activity

The My Activity widget allows users to view their own activities and actions performed by the user. The activity log shows the date, time, entity, entity name, action, description, and the entity GUID. Users can filter the activity log by system or Cabinet specific activities and by period. The user can navigate between all the pages of the activity report using the arrows located at the bottom of the report.

To run a My Activity report, follow the steps below:

1. Select a specific Cabinet or select "System" to view actions in all Cabinets in the top right corner of the widget
2. Select a time period for the report (Today, Week, Month, Quarter, Year, All Dates, etc.)
3. Click Refresh in the top right corner of the widget to ensure all data is current

Notifications

The Notifications widget provides users with notifications about important actions within the application. Users can receive and configure many notifications, so users are notified when specified actions are carried out by other users in the system. For example, a user may set a notification configured to notify them when files in a specific cabinet or specific files are printed, downloaded, emailed, edited, and/or deleted. This ensures that users are made aware of important actions taken and improves collaboration and accountability.

Types of Notification:

Email: Email Notifications require SMTP configuration before the Email Notifications option can be setup. Without SMTP, the email will fail to send. This notification will provide a reminder via email that a document has gone through one of the trigger actions that has been selected.

Notification Widget: The widgets notification option will display the notification in your dashboard and the bell icon next to the left of the User at the top right of the application.

ECM Mobile Application: The ECM Mobile Application notification option will display the notification on your Dokmee ECM Mobile Application.

Configuring the Notification Widget Settings

Once enabled, users will see the notifications widget on the user's dashboard. To configure the user's notifications, follow the steps below:

1. Click the gear icon in the top left corner of the widget.
2. In the Notifications Settings page, select the Cabinet or Documents tab.
    a. Cabinet: This function will set notifications for all files in a specific cabinet.
    b. Documents: This function will set notifications for a specific file or set of files.
3. To set Cabinet level notifications, select a Cabinet from the drop-down menu.

a. To set a Document level notification, click the Documents tab to select a Cabinet from the drop down menu.
b. Select a specific file from the Select Files drop down menu.

4. Click on the "Add Rule" button.
5. Under the Trigger Actions section of the new rule, check each action that requires a notification to be sent:
   a. Print
   b. Download
   c. Email
   d. Edit
   e. Delete
6. Under the Notifications section of the new rule, check each type of notification to be sent:
   a. Email
   b. Notifications Widget
   c. ECM Mobile Application
7. Click Apply
8. Click OK

3.3 My Profile

3.3.1 My Profile

The profile options will be located at the top right by clicking on the user's name. This allows users to edit their profile info, including their first name last name, and password. It will also provide access to the following features: signature, email settings, manage sessions, tools, language, and sign out. This gives the user the ability to make changes without involving the user's system administrator.

How to change information in My Profile

1. To expand the profile menu at the top right of any page in Dokmee ECM click on your username to access the drop-down menu.
2. Click 'My Profile' in the drop-down.
3. Within the popup, the user can change their First Name, Last Name, Email Address, and password.
4. When changing your password, users will be required to enter their old/current password and then the new one. Once you finish it, click on Save.
5. Click the 'Save' icon at the bottom of the My Profile popup to apply any changes

My Signature

By selecting “My Signature” from the Profile Menu users can view a list of all the signatures that have been configured for their user profile. It will also allow the user to create an electronic signature.

To create a customized electronic signature

1. Click on the My Signature option and a new window will pop-up.
2. The first window presented is your list of current signatures.
3. When clicking on any of the existing signatures, a menu will be displayed at the end of the line and you can either edit or delete the selected signature.
4. From this menu, users can add a new signature by clicking on the Plus Icon in the top right of the Signatures page.
5. A new window tab named Properties will be displayed right next to the Signatures tab.
6. In the properties tab, you will be able to configure a new electronic signature.
    a. Enter a name for the signature profile
    b. Check the desired properties of the signature (See the section below for details)
    c. Select the input option: Freehand, Image Upload, or Text

Properties:

1. Name: Name of the signature that is being created. This will help you to identify your signature by displaying the entered name on the Signatures tab, and on the signatures feature within the file viewer.
2. Password: This checkbox if selected allows the user to protect their signature with their system password.
3. Date: If selected the date that the signature stamp was applied to the document being signed will display on the signature.
4. Time: Like the Date option if the time option is selected the signature will display the exact hourly time the signature was applied.
5. Username: The user’s username will be displayed on the signature, right below the message “Electronically Signed by.”
6. Once all the desired data is selected towards the middle of the window above the signature text box you will see 3 input options.
    a. Freehand: use your mouse or touchpad to write your signature.
    b. Image: upload an image from your computer and use it as your signature stamp.
    c. Text: you can type the name that will be displayed on the signature.
7. A preview of your signature will be displayed in the main window.
8. You can click on clear and restart your signature (Freehand, Image, or Text).
9. If you want to cancel the operation, click on cancel.
10. Once you are finished, click on Apply and Ok.

My Mail Settings

My Mail Settings allow a user to configure the user level SMTP and Email Options including email signatures and download link expiration settings.

Edit an Email Signature

1. Expand the user profile dropdown menu at the top right.
2. Select 'My Mail Settings'
3. Under the Options tab, users can edit the default email signature when emails are sent from ECM 7.
4. Choose the check box on the popup to receive a BCC of all outgoing Emails.
5. Set up the expiration date of shared links.
6. Select 'Save' to apply any changes made in 'My Mail Settings'.

My Sessions

From this option the user can see all open sessions that are open under the same username. The date and time of when the session was started will be displayed, as well as the device that session was using. The user can select the specific session that needs to close with the three ellipses menu towards the right side of the page.

My Tools

This option allows the user to access the connections file for the Dokmee ECM Hub Applications as well as the installer for the Dokmee ECM Hub Application.

Downloads

Tools Connection (XML): This will download the Tools Connection (XML) file. This file is used to configure the connection settings for integration with the Dokmee Hub as well as the Dokmee Capture application.
Hub (32-bit): This option will download the Dokmee ECM Hub in a 32-bit format.
Hub (64-bit): This option will download the Dokmee ECM Hub Installer in a 64-bit format.

Dokmee ECM Hub

The Dokmee ECM Hub is used to download and install all provided addons and the Import application. Once the installer is downloaded and installed from My Tools menu. The user will be able to see the Dokmee ECM Hub on the desktop and open the application.

Steps to configure Dokmee ECM Hub Connection:

1. Once open, the user will need to configure the connection settings by navigating to the Connections tab towards the top left of the Dokmee ECM Hub.
2. In the connections tab the user can create a new connection to a Dokmee ECM

instance by clicking on the button labeled “New”.
3. The application will prompt the user to select the Tools Connection (XML) for the desired Dokmee ECM connection.
4. Once the XML file is selected the connection setting for Dokmee ECM will automatically populate and the Dokmee ECM hub will prompt the user for credentials to the Dokmee ECM instance.
5. Once the user enters the credentials and clicks on “OK” the new connection to the installation of Dokmee ECM will be listed in the Connections Tab.

Note: Users can configure multiple connections to Different Installation of Dokmee ECM if necessary.

Dokmee ECM Hub Tools:

Virtual PDF Printer: This virtual printer will allow users to upload to Dokmee ECM by using the print feature on any document, website, or application and selecting the “Dokmee Virtual Printer”. The user will be able to select the cabinet and manually index the document.

Word Add-in: This Add-in enables the ability to upload into Dokmee ECM directly from Word. It will have a user interface that allows the user to select which cabinet to upload to as well as the ability to manually index the document.

Outlook Add-in: This Add-in enables the ability to upload into Dokmee ECM directly from Outlook. It will have a user interface that will allow the user to select what cabinet to upload to as well as the ability to manually index the document.

Excel Add-in: This Add-in enables the ability to upload into Dokmee ECM directly from Excel. It will have a user interface that will allow the user to select which cabinet to upload to as well as the ability to manually index the document.

Import App: The import application allows users to set up complex and advanced import jobs of files and metadata to a Dokmee ECM installation. The user can configure manual import jobs of files, files with metadata, and files in a folder structure. The import application also allows users to configure automatic import jobs that are scheduled to import files from a watch folder.

Language

In this option, the user will see all available languages for the application. This is a user level setting so any language selected will be displayed only for the user that is selecting the desired language.

Available Languages: English, Spanish, French, Portuguese, Arabic, Bahasa Indonesia.

Sign Out

This will sign out a user and free up a concurrent license if that is the used license model for the License key activated.

1. Click the User Settings icon.
2. Click "Sign out".
3. The user will be taken to the “Sign In” Page.

3.4 Files

3.4.1 File Explorer

Users can expand the full list of modules by clicking the ellipsis (three horizontal lines) in the top left corner of the Dashboard. The user can access each module with a single click. Click Files to display a list with all file cabinets available for this specific user. Each Cabinet consists of 4 options to view files: Favorites, Recycle Bin, Files, and Folders.

View a Full List of Files in a Cabinet

1. Click Files in the list of modules
2. Click on the desired cabinet name
   a. The 4 viewing options will be displayed: Favorites, Recycle Bin, Files, Folders
3. Click "Files"
4. The full list of the cabinet’s files will be displayed
5. By default, the field Headers include the Document Title, each index field for the file cabinet, the original file name, Created date, Modified date, and the Size of each file.
6. From the Files view, users can open a file by double-clicking the desired document.
7. Highlight one or multiple files, and an ellipsis will be displayed on the right.
8. Click the ellipsis to access the following options in a drop-down menu:
   a. Favorite: Save documents as favorites and they can either be seen on the favorites list within the cabinet, or on the dashboard’s Favorites widget.
   b. Email: Users can share one or multiple documents by email either as an attachment or as a link.
      i. The advantage of sending files as a link is that there is no limitation in terms of the file size.
   c. Download: As single files or as zip
   d. Index: Here is a shortcut to see or edit the list of indexes of this specific file
      i. This option is not available when multiple files are selected
   e. Clone: Easily duplicate your files
      i. This option is not available when multiple files are selected
   f. Notifications > This is a shortcut to add notifications to the specific selected file
   g. View: Open a document from this option. You can also open a file by double

clicking in it
  i. This option is not available when multiple files are selected
h. Delete: The file will be removed from the Files list and will be stored on the recycle bin of the cabinet.

Index Fields: View and update Index Fields for a specific file.

1. Double-click a file to open the file viewer
2. Click the Index fields tab (top option) in the panel to the right of the document to view the Index values
3. Enter new values or edit existing values in the Index fields as needed
4. Click Save

Page Navigation: Navigate a multi-page file

1. Double-click a file to open the file viewer
2. Click the Pages tab in the panel to the right of the document to view the pages of a file
3. Scroll through the pages of a file using the mouse or scrollbar to the right
4. Add, extract, split, and delete pages from a file
5. Double-click a file to open the file viewer
6. Click the Pages tab in the panel to the right of the document to view the pages
7. Click Check Out on the file viewer
8. Highlight the pages to be edited
9. Select one of the multi-page edit tools in the top right corner above the multi-page viewer
   a. Add Pages
      i. In the prompt, select Before or After to specify if the pages being added should be inserted before or after the highlighted page
      ii. Click Upload to add the desired pages

iii. Confirm the pages were added correctly

iv. Click Check In

v. Save as a new version or Upload as a new version

b. Extract Pages

i. Click the Extract Pages function

ii. Confirm the selected pages are indexed correctly

iii. Click Extract

c. Split Pages

i. Select page where split should occur and click the Split function

ii. Confirm index values for the new document

iii. Click Save as New Version

d. Delete Pages

i. Select the pages to be deleted

ii. Click Delete Pages

iii. Click Yes

iv. Click Save or Upload to save the changes

Comments: Enter and search comments on a file

1. Double-click a file to open the file viewer
2. Click the Comments tab in the panel to the right
3. Type comments in the bottom-left text boxes labeled “Enter Note” to leave comments
    a. To search existing comments, enter a text value in the search bar at the top of the comments section
    b. Click the Print/Save icons to the left of the search bar to print and save comments

Versions: View all versions of a file

1. Click the Versions tab in the panel to the right of the file viewer
2. Use the scrollbar on the far right to navigate all saved versions
3. To revert back to a previous version, users can click the “revert arrow” below each prior version
    a. Note: This will remove the most recent version and cannot be undone

Text: View the OCR text of a specific file

1. Double-click the file to open the file viewer
2. Click the Text tab below the Versions tab
3. The full OCR text from the file can be viewed to the right

File Info Panel

1. Double-click the file to open the file viewer.
2. Click the Info tab below the Text tab.
3. The original file information from the file can be viewed to the right.

Check In/Out

The Check In and Check Out functions are designed to prevent multiple users from editing the most recent version of a file simultaneously. Once a document is checked out, other users will not be able to edit the document until it is checked in. Users will still be able to view the file even when it is checked out.

1. Double-click the file to open the file viewer
2. Click Check Out to access editing tools
3. Edit/modify as needed
4. Click Check In

   a. Click Save
   b. Click as Save New Version
      i. Save As option will save the modifications as a new file in ECM
   c. Select Major or Minor for the new version
      i. Enter any necessary comments for the new version
5. Click Save New Version

Annotations: Access annotations for editing a document

1. Double-click the file to open the file viewer
2. Click Check In
3. Annotation functions are now accessible on the far left of the file viewer
   a. Stamps: Click to access available stamps
   b. Signature: Password required
      i. Setup a user signature by clicking the user profile in the top right of the dashboard view and go to My Signature in the drop down menu
   c. Freehand
   d. Lines
   e. Line Connector
   f. Rectangle: This can be used for retracting sensitive information
   g. Ellipse
   h. Polygon
   i. Sticky Note
   j. Textbox
   k. Highlight
4. Select the annotation function desired
5. Click directly on the file where the annotation should be inserted
6. Click Unlock or Check In to save changes

3.4.2 Uploading Files

Users have several options to upload new files into a cabinet. New files will automatically include the original file name, created date, modified date, and file size.

Manual

Users can manually upload files by using the upload button in the "Files" module. This will allow the user to select multiple files to upload from the computer's file system.

Drag and Drop: Users can also drag and drop files directly into an open cabinet.

Automatic

To automatically upload files to Dokmee ECM the user will need to configure the Dokmee ECM Hub and Dokmee Import Application in order to schedule jobs for automatic import.

3.4.3 Top Menu

The top menu is located at the top of the "Files" module directly above the Document Title index field column. Here the user will find a multitude of functions and features that will help organize, manage, and maintain the documents in the file cabinet. Below is a list of all the functions located in this menu section.

Select All

The select all function will select all visible documents on the page. This allows the user to favorite, email, download, add notifications, and delete all the documents on the page.

Upload Button

How to upload files directly from the file list within a cabinet

1. Select a cabinet
2. Click Files to open the files list
3. Click the Upload function above the Document Title column header
4. Select files to upload

Find & Replace

How to find and replace values of index fields for multiple documents

1. Select a cabinet

2. Click Files to open the files list
3. Click the Find and Replace button above the Document Title column
4. Enter the Index field to be updated
   a. Click Advanced to add specific parameters or filter the applicable files
   b. Replace Null Values: check this box to update the selected index for all applicable files instead of finding a specific value to replace
5. Find What: Enter the value to be replaced
6. Replace With: Enter the value desired for the selected index field
7. Click Replace All
8. Confirm the Replace With value was correctly updated for applicable files

Merge Files

1. Select a cabinet
2. Click Files to open the files list
3. Click the Merge Files button above the Document Title column
4. Highlight the files that should be merged into one new document by clicking each document once
   a. At least 2 files must be selected in order to merge
5. Click Options at the top of the merge page
   a. Use the green arrow icons to the left to place the documents in the correct order in which they should be merged
      i. Check the Delete Original Files checkbox to delete the existing files after merging
6. Click Index at the top of the merge page
   a. Edit the index fields as needed
7. Click Merge in the bottom right of the merge page
8. The selected files should be merged into one new document
   a. The original files may still exist as separate documents if the user did not specify to delete in step 5a.

Sort

1. Select a cabinet
2. Click Files to open the files list
3. Click the arrow icons beside the index field headers to sort by each index field from A-Z or smallest to largest

3.4.4 Cabinet Tree

The cabinet tree is to the left side of the 'Files' modules. Here the user will be able to navigate to all the cabinets that are available to the user respecting rights and permissions. Here the user will be able to expand the cabinet and view their Favorites, Recycle Bin, Files, and folders. The user will also be able to refresh the cabinets to apply any changes that have been made.

Favorites

All documents marked as favorites will be accessible in the favorites list option. Users can easily access, view, search, and modify favorited files from this view.

Recycle Bin

All documents deleted from your cabinet will be stored in this view option. Users can search, delete, and restore recycled documents.

1. Open a cabinet
2. Select the Recycle Bin view option
3. Highlight a file to restore or delete
4. Restore a file:
    a. Click the ellipsis on the far right of the selected file
    b. Click Restore from the dropdown menu
5. Delete a file:
    a. Click the ellipsis on the far right of the selected file
    b. Click Delete from the dropdown menu

Folders and Dynamic Foldering

Dokmee ECM utilizes Dynamic Foldering which allows users to create folder structures based on index values. The folder structure for each cabinet is set to a default structure for all users in the cabinet settings. Users may have the option to temporarily customize a folder structure to accommodate specific searching and categorization needs.

Within the Folders view option, files will be stored and organized into folders based on two scenarios:

Default

1. When creating the file cabinet under Cabinet Manager (create hyperlink to take the user to this section), the user must inform what index fields will be part of that cabinet.
2. Once the index fields are created, the user can define the default structure of folders based on the values in the index fields.
3. If the "Allow user customization" checkbox was selected in the Folders tab of the cabinet manager, then users with access to the cabinet will also have the following option.

Custom

1. From the main repository, click on the Folders view option
2. Click the setting wheel icon above the cabinet name
3. Once you click this icon, a new window will appear on the right and the list of index fields will be displayed
4. On the drop-down list, you can change the view mode between default and custom
5. If you select Custom, you will be able to drag and drop any index field created within the cabinet and the custom folder structure will be organized according to the order of the index fields in the "Folders" box.
   a. The index field at the top of the list will be the first index value used for foldering.
   b. The index field at the bottom of the list will be the last index value for foldering.
6. Click Save once the custom folder structure is in the desired order.
   a. This will only change the folder structure for the user making changes. All other users will continue to see this cabinet in the default folder structure.
7. The user should now be able to view the custom cabinet folder structure

Notes: You can create folders and sub-folders to organize your files. The amount of folder and subfolders will be determined by the amount of Index fields created within the cabinet. Once you upload a file into the Dynamic Folder, a new window will pop-up and it will automatically be indexed with all values of the folder hierarchy it is uploaded to. If an Index Field Value is missing, the file(s) will be placed in the folder structure with the available index fields. You can edit the index information. If a file index value is changed, the folder structure will be sorted into different folders accordingly.

i. A Dokmee ECM user who does have rights to Upload files, but does not have rights to Index, will be granted with rights to Index the files he is uploading into the system. This Indexing exception is only done while uploading.

3.4.5 Search Within a Cabinet

On the right side of the top menu, you will find the search bar where you can quick search your files based on all fields, All Fields + Full Text, any Index field, or through the file name.

a. Select the option on the drop-down menu.
b. Type the search reference and click enter.
c. The list with the results will be displayed.

3.5 Search

3.5.1 Performing a Search

The search module will provide multi constraint advanced search for files found in the file cabinet of choice. Search Templates can be created for frequent search queries. The search module works with multi line conditional statements, allowing users to perform extensive and detailed searches within file cabinets.

Performing a Search

- Expand the menu on the left side of the window.
- Click on the ‘Search’ option labeled by a magnifying glass icon.
- Select the cabinet you will be using as the base of the search.
- On the search criteria area, the user can select the field that he wants to use as reference for his search:
  - Document Title > The tile of the document within ECM.
  - Index Fields > Any index Field created within the file cabinet that is the subject of the search.
  - Comments > Comments added into the document.

- Text > Allows you to search full-text data within the document.
- File Info > Type, GUID, Last Modified Date, Date of Creation, Original Filename, and Size.
- Email Info > You can perform search by the criteria of From, To, CC, Subject, and Sent.

Templates

Saving a Template:

- Now that you have created your conditional search you can click the save button . This will save your template, allowing you to re-use the search. This is commonly used for searches you might have to do within the system often.
- You can overwrite a template by changing the conditional statements and pressing save.
- To select the template you saved, you click on the 'Template' drop down and select it.
- Deleting a Template:
- If you want to delete a template you have created, you can click the delete button .

Clear

To clear your search results, you can select the 'Clear Report' button . Doing this will clear your search results from the result pane.

Reset

To reset your conditional templates and cabinet, you can select the 'Reset' button which is found on the top right-hand side of the screen. Clicking this button will clear out your conditional statements, and selected cabinet. This does not remove your saved template; you can reselect the template within the 'Template' drop down.

Export CSV

To export your search result's metadata information, you can click the 'Export CSV' button . This will export your report to a CSV file.

3.6 Inbox

3.6.1 Inbox

1. Accessing the Workflow Inbox
   - Locate and click on the horizontal ellipse menu available in the top left side of the application.
   - This will expand the menu options.

   - Click on the Inbox menu option.
   - By default, the Inbox list view will be displayed.
2. Inbox
   - Layout
     - The inbox section will display all file(s) currently in tasks assigned to the current user.
     - The following Informational columns are provided in the Inbox window: Task entry date, Document Title, Task, Workflow, File Cabinet, Status and start date.
     - Additional Cabinet, Workflow and Task filters are included in the top right area of the Inbox view.
   - Viewing Files
     - To open a file, either double click on the file to open the file viewer or select the vertical ellipses menu and click on View.
   - Workflow Viewer
     - By default, the selected file will open with workflow task options for Decisions on the right side of the screen.
     - Available Workflow Tabs
       - History
         - Provides a workflow audit history of actions for the selected file.
       - To-do List
         - Displays the custom to-do list configured with the workflow task.
         - This Workflow Tab is only display with tasks containing To-Do lists.
         - Depending on the decision rule, the To-Do list may be required.
       - Decisions
         - Enumerates the available decisions for the current workflow task.
         - The decision drop down may vary based on the workflow task.
         - A comment section is available to supply any additional remarks before approving.
         - Depending on the decision rules, comments may be necessary for the file to successfully be processed.
   - How to Process a File to the Next Task
     - Carry out the required modifications, to-do lists and commentary.
     - From the decision drop down menu select the decision you wish to apply.
     - Click on the Submit button in the bottom right area of the screen to complete the task.
3. History
   - The workflow history tab in Inbox allows individual users to perform search filters for any workflow/task they have processed in the past.
     - By default, the list will be empty.
     - To conduct a search, first select the File Cabinet.
     - Next, select the Workflow.
     - Lastly, select the Task to display.
     - This will automatically list all files previously processed by the current user.

3.7 Workflow

3.7.1 Workflow

The workflow module allows administrators to create and design a sequence of tasks that processes documents through pre-defined business rules.

Workflow Pre-requisites

1. You must be a File Cabinet owner to create or delete workflows.
2. File Cabinet owners must add and save user roles to the file cabinet rights before they are able to add members to a workflow job function.
3. If email notifications will be used for the workflow, then SMTP settings must be properly configured for the ECM system.
   - SMTP System Settings may be configured from Configuration > SMTP.
4. Confirm the File Cabinet contains suitable index fields to trigger file entry into the workflow.

3.7.2 Workflow Manager

The workflow manager is an administration tool which allows File Cabinet owners the ability to create, edit and delete workflows. This includes designing the flowchart, trigger rules, and job functions which determine who will be assigned to decisions within each individual workflow task.

How to Create a Workflow

1. Select the down arrow option next to the New text to expand all options.
2. Provide the workflow a name in the Name field.
3. A description may be entered but is not required.
4. Next select the File Cabinet the workflow should be assigned to.
5. Click the Create button to create the new Workflow.

How to Access Workflow Settings

1. Locate the desired workflow to edit.
2. There are three ways to access the settings options for a Workflow.

- Settings gear icon (⚙): You may access this option by hovering over the far right of the workflow row and click on the icon.
- The vertical ellipses menu (⋮): Can be accessed on the far right of the workflow row > Click the vertical ellipses and select Settings.
- Double click function: Double click on the desired workflow > This opens the Process Builder > Click on the Settings button on the top right are of the screen.

Workflow Settings

1. Workflow Info
   - Provides general information about the workflow.
   - This information may be modified by the workflow admins and file cabinet owners.
2. Admins
   - By default, file cabinet owners will be automatically assigned as workflow admins.
     - File Cabinets cannot be removed from the admins list unless they are removed from File Cabinet ownership.
   - General users may be promoted to admins for the selected workflow.
     - Users will first need to be assigned rights to the File Cabinet by the File Cabinet owner.
3. Triggers
   - Triggers are required events that start workflows.
     - You cannot manually start a workflow.
   - On new files
     - This option must be checked and saved to be enabled.
     - Adds any new file added to the file cabinet to the workflow.
   - On update index of existing files
     - This option must be checked and saved to be enabled.

- Adds files which either contain all or any of the set index criteria.
- Admins may edit the Any/All option from the drop-down menu next to “If”.

o Active Instances

- Displays a list of all active files which are still in progress.
- Workflow Admins have the right to open and act on active instances if need be.

o Completed Instances

- Displays a list of all files which have been completed.

How to Create Job Function

1. Locate the Job Function area in the bottom area of the Workflow Manager.
2. Select the down arrow option next to the New text to expand all options.
3. Provide the Job Function name in the Name field.
4. Select the File Cabinet the Job Function should be assigned to.
5. Click the Create button to create the new Job Function.

How to Open and Add Users to the Job Function

1. Locate the desired Job Function.
2. You may open the Job Function any of the following three ways:
   - o Settings gear icon (⚙): You may access this option by hovering over the far right of the job function row and click on the icon.
   - o The vertical ellipses menu (⋮): Can be accessed on the far right of the job function row > Click the vertical ellipses and select Settings.
   - o Double click function: Double click on the desired job function.
3. Job Function Interface Option:
   - o Change the Job Function Name by editing the name value and saving.
   - o View the Available pane based on All, Roles and Users
   - o View the Assigned pane based on All, Roles and Users.
   - o Both the available and assigned list have Filter search options which may be used to locate a specific user or role.
4. Adding Roles and Users to a Job Function:
   - o Using the search filter or drop-down menu, select the desired user or role and select the Right Arrow button (>) to add them to the Assigned pane.

How to Access the Process Builder and Edit a Workflow

Accessing the Process Builder

1. Locate the desired Workflow.
2. You may open the Process Builder any of the following three ways:
   - Process Builder icon: You may access this option by hovering over the far right of the job function row and click on the icon.
   - The vertical ellipses menu (): Can be accessed on the far right of the workflow row > Click the vertical ellipses and select Process Builder.
   - Double click function: Double click on the desired workflow.
3. Once opened, the Process Builder information will be presented.
   - By default, the workflow will include one unpublished workflow design whenever the workflow is initially created.
   - This Process Builder screen will list all available workflow designs which were previously cloned in order based on the most recently created.
4. To load a workflow design, click on any available workflow design from the available list in the Process Builder.
5. This will open and display the Process Builder (workflow designer) in the bottom half of the screen.

Process Builder Layout and Description

1. The Process Builder includes Activity functions on the left pane of the screen which may be added to the diagram via drag and drop.
   - Tasks
     - Are activity item which is assigned to a specific user(s) or role(s), indicating specific actions to be performed on a document(s) added to the task.
     - Tasks include To-do Lists, Multi- User or Specific User Reviewer Assignment, Email Notifications and Decisions.
   - Actions
     - Actions are activities/functions which take effect immediately after a decision is made on a task.
     - Email
       - Allows workflow admins to create a default email template which is automatically sent if routed through the decision the email action is assigned to.
       - The processed workflow file may be attached to the workflow by selecting the “Attach File” option.
     - Stamp
       - Allows workflow admins to assign a default Stamp, page number and saving option when routed through the decision the action is added to.
       - You may save as a new Major or Minor version.
     - Clone

- Allows file cloning upon decision routing.
- Admins may decide to include original indexing information or leave the indexing blank.

- Update Indexes
  - Allows Index Field updating on the selected field.
  - Admins may choose a Fixed Value, Prompt the User or Delete the Value upon the routing decision.

- End Points
  - End Points are defined closing actions to a workflow process.
  - Send to Workflow
    - Automatically routes to another workflow.
    - At least two workflows must exit to use this end point.
  - Delete File
    - Deletes files automatically when the process reaches this end point.
  - End Workflow
    - Removes the file from the workflow once it reaches this end point.

2. Toolbar Options
   - Save Button
     - Allows workflow admins to manually save workflow design layout.
   - Rotate Buttons
     - Allows workflow admins to rotate the workflow design.
   - Export SVG
     - Allows workflow admins to export an SVG file with the workflow design.
   - Export PNG
     - Captures an image in PNG format of the workflow design.
   - Print
     - Allows workflow admins to print the workflow design.
   - Bring To Front
     - Allows workflow admins to move an activity forward.
     - This is a helpful option in situations where activity items are layered together, and an item need to be sent to the front.
   - Send to Back
     - Allows workflow admins to move an activity back.
     - This is a helpful option in situations where activity items are layered together, and an item needs to be sent to the back.
   - Auto Layout Graph
     - Automatically sets a diagram layout.
     - This is designed to group activity items close together.
   - Zoom Functions
     - Zoom To Fit: Auto zooms into the area of the diagram which “fits” the entire workflow design in the process builder.
     - Zoom: Allow manual zoom selection in and out.
       - By default, it is set to 100%
     - Grid Size: Allows adjustments of the locating points on the diagram,

referring to the lines of the grid in the workflow diagram.
  - Snap Lines: Allows a workflow admin to manipulate control objects on a common design surface to define matching alignment.

3. Presentation and Text
    - This area allows workflow admins to modify the Fill and Outline properties of a task.
    - This includes color for the Fill, Outline, Outline style and Outline thickness.
    - Font size, font type, font color and thickness may be selected from the Text area.

4. Workflow Diagram Navigation
    - In the bottom right corner of the workflow, admins may easily navigate through the workflow diagram.
    - To navigate, simply click in the white square to drag across the square to change the diagram view.
    - This is a helpful option in situations where the workflow design is large and includes many tasks and actions.

Editing and Creating New Tasks

1. Starting Point
    - By default, the Process Builder will include a Start Point and a task containing the Workflow Name.
    - The task name is automatically set, based on the workflow name.
    - You may edit the name of newly created tasks by double clicking on the task and modifying the name from the General options in the Task Window.
2. Creating a new Task
    - Locate the Task option in the Activities area in the left pane.
    - Click and hold the left button over the Task option.
    - Drag and drop the task onto the Workflow diagram grid.
3. Editing a Task
    - Double click on the task to view all Task Options.
        - General
            - Allows admins to modify the Task name.
            - Allows admins to set a To-do List for the specific task.
                - To-do lists may be re-ordered by simply dragging each individual list value and inserting before/after other available items.
        - Assignment
            - Allows admins to assign available Job Functions to the Assigned area for the select Task.
            - Users a part of a Job Function which is added to the assigned area will automatically receive the workflow inox notification and email notification if properly setup.

- The Specific Reviewer check box option, when selected, allows proceeding workflow users to specify which of the added individual users should receive the document specifically.
  - This option is available at the decision moment.

- Notifications
  - *Note* SMTP settings must be properly setup for notifications to work.
  - Allows admins to set a notification email template for new entry and reminder emails.
  - Task Entry email notification is the initial email sent to the user(s) or role(s) assigned to the task.
  - Reminders email notification may be enabled to reminder user(s) or role (s) assigned to the task.
  - Preset Field Selections are available in the right side of the notification screen to select workflow attributes more conveniently for the: To, Subject Line, and Message Body.
    - Enable Radio Button
      - Enables or disables the notification email service for task entry and/or reminders.
    - To Field
      - Admins may manually enter email recipients or select from the Emails option in the right pane.
      - To add a present option, click on the purple selection within the Emails section in the right pane.
    - Subject Field
      - Admins may manually enter a subject line or select from the Workflow and File Info section in the right pane.
      - To add a present option, click on the purple selection within the Emails section in the right pane.
    - Message Body
      - Admins may manually enter a subject line or select from the Workflow, File Info and System Info section in the right pane.
      - To add a present Email option, click on the purple selection within the Emails section in the right pane.
    - Attach File
      - Adds the current file within the workflow task to the email notification.
      - This option may be added to both the initial email notification and reminder.
    - Reminder Options
      - Frequency: Numeric Value Entry
      - Unit of Time: Minutes, Hours, Days
- Decisions
  - Decisions is a user action of deciding the routing fate of the document after it has been reviewed in the current task.

- Info
  - Adding a decision
    - To add a decision, click on the plus symbol (+) on the right are of the screen.
    - Once added, admins may enter a decision name.
      - This is the name that will be displayed at the time of making the decision.
    - You may update the number of approvals which are required for the decision rule to be executed.
      - By default, it will require at least 1 decision.
  - To-do list must be completed to make this decision.
    - You may require the set To-do list be completed from the General area to proceed to the next task.
    - This option is unchecked by default.
  - Comment Required
    - You may require a comment when executing a decision.
    - This option is unchecked by default.
  - Removing a decision
    - Click on the desired decision from the left side of the screen and click the blue Delete text on the top right of the Info tab.

- Rules
  - Rules are conditions assigned to a workflow decision which define where a document is routed to.
  - This area will only display existing rule(s) for the selected decision.
  - To create, edit or delete a rule, you must edit/create a routing connection between two tasks.

- Creating a Routing Rule.
  - To create, edit or delete a rule, you must connect a task using the “route” connector to another task within the workflow process builder.
    - To view the route option, single click on the desired task to display additional options such as rotate, delete and route.
    - Drag the routing connector to the target task.
    - Upon selecting the target task, it should display a yellow square to indicate connection.
    - Once connected, users will be presented with the following information:
      - Decision field
        - This field will display any existing routing decision.
        - To select an existing decision, click on the field to show available options.
      - Name field
        - May be used to provide a new rule name.
      - Color Picker

        - You may select a routing color for the routing rule.
      - Conditions
        - Select the rule condition to be applied to the routing decision.
        - When If, Else if or Else are selected, a description for that rule must entered before saving.
          - This description value will be displayed on the routing link between two tasks.
        - If and Else If conditions will require admins to provide routing statements based on the available index fields for the File Cabinet, the workflow is assigned to.
      - Available Rule Conditions
        - Always
          - Route's file(s) to a linked workflow task when the decision is executed.
        - If
          - Route's file(s) to a linked workflow task based on a conditional value.
          - Only one if condition may be setup on a decision.
        - Else If
          - Route's file(s) to a linked workflow task based on a second level condition after the if condition.
          - Multiple else if conditions can be setup on a decision.
        - Else
          - Route's file(s) to a linked workflow task if the if or subsequent else if conditions are not met.
        - Only one else condition may be setup on a decision.
- Editing or deleting a routing rule
  - Editing a rule
    - Locate the routing rule link description you wish to edit.
    - Double click on the routing rule description that was added to the condition.
    - This will open the Edit Rule options to edit.
  - Deleting a rule
    - Locate the routing rule link you wish to delete or reassign.
    - Hover over the routing rule link and select the red x to delete the link.
    - Once selected, it will prompt a Delete Rule screen.
      - You may reassign the rule in place of deleting.
      - Reassign to another decision.
        - You may select this option if reassignment is possible in place of deletion.
        - When selected, you may choose the decision to reassign to.
      - To delete the rule, simply click the Ok button.
- Editing Else If conditional sequences
  - In scenarios where multiple else if conditions exist, it may be necessary to

specify which rule should run first.
  - By default, it will add else if conditions in order based on when they were created.
  - To edit the else if order, locate the task the multiple conditions were created for.
    - Select the Decisions option.
    - Select the Rules tab.
    - Locate the Else If conditions.
    - Within this section you may click, drag, and reorder any of the else if conditions within the rules area.
      - Only Else If conditions may be reordered.
      - Moving an else if condition to the top of the list will prioritize the condition over subsequent else if conditions.
      - Click the Apply or Ok button to save changes.

4. Publishing a Workflow
   - Locate the desired workflow to publish from the Process Builder.
   - Hover over the far-right side of the Workflow row to view the play button.
     - Click the button icon to Publish.
     - You may also use the vertical ellipses to view the Publish.
   - Notes
     - Once a workflow is Published, it can no longer be edited.
     - You may open tasks and routing conditions in read only mode.
     - If editing is required while a
5. Unpublish a Workflow
   - All files added to a published workflow must either be processed or removed from the workflow to Unpublish.
   - If files are still active within a published workflow, admins may intervene and manually remove those active file(s) within the active instances area of the workflow settings.
   - To remove active files, select the file from the active instance list and use the vertical ellipses menu and select the Remove option.

Workflow Inbox

1. Accessing the Workflow Inbox
   - Locate and click on the horizontal ellipse menu available in the top left side of the application.
   - This will expand the menu options.
   - Click on the Inbox menu option.
   - By default, the Inbox list view will be displayed.
2. Inbox
   - Layout
     - The inbox section will display all file(s) currently in tasks assigned to the

current user.
    - The following Informational columns are provided in the Inbox window: Task entry date, Document Title, Task, Workflow, File Cabinet, Status and start date.
    - Additional Cabinet, Workflow and Task filters are included in the top right area of the Inbox view.
  - Viewing Files
    - To open a file, either double click on the file to open the file viewer or select the vertical ellipses menu and click on View.
  - Workflow Viewer
    - By default, the selected file will open with workflow task options for Decisions on the right side of the screen.
    - Available Workflow Tabs
      - History
        - Provides a workflow audit history of actions for the selected file.
      - To-do List
        - Displays the custom to-do list configured with the workflow task.
        - This Workflow Tab is only display with tasks containing To-Do lists.
        - Depending on the decision rule, the To-Do list may be required.
      - Decisions
        - Enumerates the available decisions for the current workflow task.
        - The decision drop down may vary based on the workflow task.
        - A comment section is available to supply any additional remarks before approving.
        - Depending on the decision rules, comments may be necessary for the file to successfully be processed.
  - How to Process a File to the Next Task
    - Carry out the required modifications, to-do lists and commentary.
    - From the decision drop down menu select the decision you wish to apply.
    - Click on the Submit button in the bottom right area of the screen to complete the task.
3. History
  - The workflow history tab in Inbox allows individual users to perform search filters for any workflow/task they have processed in the past.
    - By default, the list will be empty.
    - To conduct a search, first select the File Cabinet.
    - Next, select the Workflow.
    - Lastly, select the Task to display.
    - This will automatically list all files previously processed by the current user.

3.8 Cabinet Manager

3.8.1 Cabinet Manager

All documents are stored in electronic file cabinets, giving you a safe place to store your files. Each file cabinet will have its corresponding index fields that once filled will have relevant information corresponding to a document.

The Cabinet Manager allows you to customize the criteria for your file cabinet. Basic information such as file cabinet name and a description. You can encrypt your file cabinet using AES-256. This allows your cabinet to have an added level of security. In the configuration menu, you will also have the capability to assign proper access rights, and function rights to users or ECM roles.

Cabinet Creation

1. From the modules tab click the Cabinet Manager tab
2. Click ‘New’ and give a Name and Description of the file cabinet you are creating.
3. If you choose to have your file cabinet encrypted, click the ‘Encrypted’ check box. (Once the file cabinet is created you can’t change this setting).
4. You can edit the cabinet settings by clicking the 'Settings' icon to the right of the cabinet.

3.8.2 Settings

The Cabinet owners and users have access to create their own dynamic folder structure based on index values. Cabinet owners can also set pre-defined folder structures for the cabinet.

Cabinet Info

Cabinet Info will give the user general information about a specific cabinet.

1. From the modules tab, click Cabinet Manager
2. Select the desired cabinet and click the setting icon.
3. Select the 'Cabinet Info' tab where you can edit the cabinet name and description as well as view cabinet disk space and number of files within the cabinet.

Index Fields

Indexing a file allows you to store criteria relevant to the document, as well as assist in doing searches within ECM. Cabinet Owners can create and remove index fields.

How to Create Index Fields:

1. From the modules tab click the Cabinet Manager tab
2. Select the desired cabinet from the File Cabinet list and click the ‘Settings’ icon on the right.
3. Select the ‘Index Fields’ tab.
4. Click the 'Plus' Icon to the right of 'Add Index' to add an index field.
5. Name your index field.
6. Select the data type.
   - Note: Data Types: Text (alpha/255 characters), Text (numeric/255), Text (alpha numeric/255), Text (all characters/255), Text (Select List/255), Text (memo/unlimited), Number (integer/10), Number (decimal/15), Date
7. Use the checkbox to select if the index value is a required field.
8. Selecting the 'Restricted' check box will only allow a cabinet owner to edit that specific index field.
   - Note: If selecting 'select list' data type click on the pencil icon to add items to the list. You cannot have an empty select list.
   - Note: If selecting 'Required' for an index value, the user is forced to input a value for that field before storing or saving the document.

Editing Index Fields:

1. From the modules tab click the Cabinet Manager tab.
2. Select the desired cabinet from the File Cabinet list and click the 'Settings' icon on the right.
3. Select the 'Index Fields’ tab.
4. Click the 'Edit' button next to the Index Field.
5. Type the Index Field name

How to Delete Index Fields from a File Cabinet:

1. From the modules tab click the Cabinet Manager tab
2. Select the desired cabinet from the File Cabinet list and click the 'Settings' icon on the right.
3. Select the 'Index Fields’ tab.
4. Use the 'Remove' icon to the right of the Index Fields to remove

How to Change Document Title Based on Index Fields:

1. From the modules tab click the Cabinet Manager tab.
2. Select the desired cabinet from the File Cabinet list and click the 'Settings' icon on the right.
3. Select the ‘Index Fields’ tab.
4. Click the edit icon by 'Document Title'.
5. Select the index field for the file to be named. By clicking the 'add' icon in the top right you can add index fields to the document title. Up to 10 index fields can be added.

- Note: When using multiple index fields for Document Title choose a delimiter for what will be displayed between the index values. "None" will concatenate the index values, "Space" will add a space between values and "Text" allows the Cabinet Owner to choose a pre-defined text.
- Note: Memo and Date fields are restricted from being used for Document Title.

Folders

Cabinet owners can set pre-defined folder structures for the cabinet. Users have access to create their own dynamic folder structure based on index values within the ‘Files’ module.

How to set predefined dynamic folders (Cabinet Owners):

1. From the modules tab click the Cabinet Manager tab.
2. Select the desired cabinet from the File Cabinet list and click the ‘Settings’ icon on the right.
3. Under 'Cabinet Settings' select the 'Folders' tab.
4. Select “Allow user customization” if you want users to be able to create their own dynamic folder structure.
   a. Note: If you this option isn’t checked, users will only see the default folder structure.
5. Under the Folders tab, two columns are displayed, "Index Fields" and "Default Folders".
   a. "Index Field" will show you all the fields assigned to the cabinet.
   b. Default Folders specifies the default folder structure for all users in the system. The index field listed at the top will be the first folder and the bottom index field listed will be the last folder in the default folder structure.
6. You can use drag and drop to order the folder based on the cabinet fields.
   - Note: The order in which you drag the fields will create the order of the folder structure.

OCR

File cabinets offer the ability to OCR new documents that are added to the cabinet. This allows the conversion of images of text into machine-encoded text, allowing you to do full-text searches, and copy/paste functionality.

Enabling Cabinet OCR:

- From the modules tab click the Cabinet Manager Tab.
- Select the desired cabinet from the File Cabinet list and click the ‘Settings’ icon on the right.
- Under ‘Cabinet Settings’ select the OCR tab in the accordion.
- You can switch ‘Enable OCR’ on. This allows for new documents to be

processed by the engine.
- You select your Primary Language, Secondary Language, and PDF Compression desired.
- Check 'Ignore Previously OCR'd Files' if you do not want to process documents that have already been processed by an OCR engine.

Owners

Cabinet owners can make edits to the configuration of a file cabinet and create workflows that will correspond to it.

Add or Remove a Cabinet Owner:
- From the modules tab click the Cabinet Manager Tab.
- Select the desired cabinet from the File Cabinet list and click the 'Settings' icon on the right.
- Select the 'Owners' tab in the accordion.
- Here you can add or remove cabinet owners

Rights

Cabinet owners can choose from a predefined list of rights to apply to the cabinet. Multiple Roles can be assigned to a cabinet. Here you will be able to assign both file access, and function rights. Function rights limits what functions can be done within a file cabinet, such as uploading and deleting files.

Cabinet Function Rights:
Note: Any right with the symbol '*' allows for restrictions based on specified index values.
- Upload Files - Allows cabinet users to download all file types within the cabinet. The cabinet owner can allow or deny rights to upload new files
- Download Files - Allows cabinet users to download a file from the cabinet. *
- Print Files - Allows cabinet users to print files in the cabinet. *
- Email Files - Allows cabinet users to email documents directly from the cabinet. *
- Clone Files - Allow cabinet users to create clones of files within the cabinet. *
- Split/Merge Files - Allows cabinet users to split/merge two or more documents into one document within the cabinet.
- Update File Index - Allows cabinet users to update a documents index values within the cabinet. *
- Delete Files - Allows cabinet users to delete files from the cabinet. *
- View Recycle Bin - Allows cabinet users to view the recycle bin and its contents. *
  - Restore Recycle Bin – Allows user to restore the contents of a recycle bin to its corresponding file cabinet.

- Empty Recycle Bin – Allows user to empty the content of a recycle bin, permanently deleting the contents from ECM.
- View Comments - Allows cabinet users to view comments associated with documents within the cabinet.
  - Add Comments: Allows user to add new comments to the document.
  - Print/Save Comments: Allows user to print/save comments.
- File Check In/Out - Allows cabinet users to check in and out documents.
  - The cabinet user who has checked out the document will be the only user allowed to make changes to the document assuming they have permissions from the cabinet owner.
  - Overwrite - Allows a cabinet user to overwrite previous revisions to a document. *
- Save As - Allows a cabinet user to save a document as a sperate new document. *
- Save New Version - Allows a cabinet user to save a new version of a document. New versions will all be linked to the original document. *
- Reorder/Add/Remove Pages (TIFF/PDF)- Allows a cabinet user to reorder, add or remove pages from a TIFF or PDF document. *
- Annotations - Allows a cabinet user the ability to add annotations to a document. *
- eSignatures - Allows a cabinet user the ability to add a custom eSignature to a document. *
- Stamps - Allows a cabinet user the ability to add a custom/default stamp to a document. *
- Burn Layers - Allows a cabinet user the ability to burn layers onto the document. Layers can be anything applied to the document within document such as annotations, eSignatures or stamps. *
- View Versions - Allows cabinet users to access different versions of files within the cabinet. If the cabinet owner denies a user rights to view a version the user will only see the most current version of the file
  - Manage Versions - Allows a cabinet user the right to manage different version of the file. This includes saving or deleting versions of the file. The cabinet owner can allow a user to view versions of the file but deny rights to manage versions.

How to Edit Cabinet Rights

1. From the modules tab click the Cabinet Manager tab.
2. Select the desired cabinet from the File Cabinet list and click the ‘Settings’ icon on the right.
3. Under the Cabinet Settings click the 'Rights' Tab in the accordion.
4. On the Rights Tab you can add one or more roles associated with the cabinet.
5. You can allow no file restriction on file access or you can click the green button next to the word ‘Allow’, now it should change to ‘Limit’ and a yellow button. Click on the gear icon, you can click the plus button on the top right and add

restrictions based on index fields allowing you to hide certain files from the role.

6. You can also set function rights with predefined templates (Power User, Editor or Read Only) or set 'Custom' function rights using the icon to the right of the drop down.
7. Clicking the 'Remove' Icon on the right can remove a role from the cabinet rights.
8. Clicking the drop-down menu in the top right labeled 'Filter' and selecting 'Users with Access' will allow you to see all users with access to the cabinet.

3.9 File Retention

3.9.1 File Retention

The file retention module allows you to create scheduled jobs for specific cabinets to automatically manage files that have exceeded a specified retention period with customizable conditions and constraints.

Retention Job Creation

Required Permissions: Only file cabinet owners will be able to set-up and configure file retention for the cabinet they desire. If you do not have proper permissions to configure File Retention the module will not appear as an available module.

Steps to Configure:

1. Click on "File Retention" from within the left menu
2. Name the File retention job and Select the Desired File Cabinet within the drop down.
3. Click create and you will be prompted with the file retention wizard.
4. Set the desired retention period and Date field you wish the job to observe.
5. Click Next for the optional Conditions tab.
6. After clicking next on the conditions tab you will be asked to set the expiration action. This will move the documents to the desired location once the period and conditions have been met.
7. On the confirmation screen you will see a summary with the retentions setting that were just created. Verify and confirm the settings to have the File Retention job created.

Retention Period

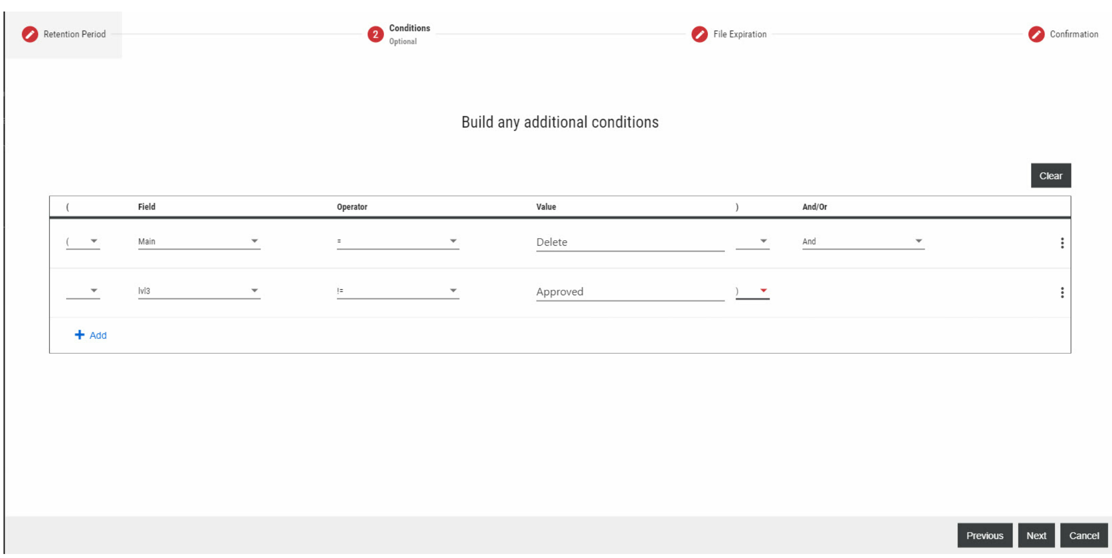
The Retention period is the period you wish to keep/store your files in a file cabinet. In this tab of the File Retention wizard you will be able to set the period in the format of years, months, or day(s).
The retention period also has the ability to watch the created or modified date fields.

Selecting the Created Date field the retention job will be looking for documents older than the period you selected based on the Created Date Field. The Modified Date Field Option will watch documents that are older than the period selected based on the Date the Document was modified.

Conditions (Optional)

Conditions are an optional layer of prerequisites you wish to configure for the File Retention Job. With configured condition in order for the job to process a document the document must meet all the conditions that have been applied to the job.

Conditions have multiple parts that need to be configured the Field, Operator, and Value. There is also an option to add multiple conditions using the And/Or conditions.



File Expiration

In the File Expiration tab of the File Retention Wizard the user will have the ability to select what will be done to the documents when the configured File Retention Job meets the configured criteria. The user will have the option to choose from Send To Retention Bin, Delete Permanently, and Update Index(es).

Send To Retention Bin: The document is moved to the retention bin for the cabinet that was selected. You can restore documents from the retention bin if wrongfully moved.
Delete Permanently: The document will be removed from the cabinet and will be unable to be recovered.
Update Index(es): The desired index will be updated to the set value that was configured.

Confirmation

The confirmation page is there to display a summary of all the items that have been configured in the File Retention Job. In the confirmation page the user will have the ability to change the File Retention Job name or navigate to a previous tab within the File Retention Wizard to make the changes that are required.

Managing The File Retention Service

The File Retention service will be managed on the server that is hosting the application. In windows services you will have the ability to Start, Stop, and manage permissions of the service. Note: this is not the same as managing the service from the service tab under configurations in the application. When managing the service within the application you will not have the ability to start or stop the windows service. This option only stops communication from ECM to the service. I order to apply changes and maintenance on the file retention service ensure to manage it from Windows Services on the Host Server of Dokmee ECM.

3.10 Security

3.10.1 Roles

Create and manage groups within the system. Manage access rights, system rights and users assigned to the role.

Role Creation

A role can be created by using the Add Role button on the top left of the Roles page.

1. The administrator will be prompted to input a name and a description of the role.

2. After inputting the role information, the administrator will be prompted to add users to the role.
3. Click the ‘Add User’ drop down and select the user you wish to add to the role. Click next to go on to the next part.
4. On the ‘System Rights’ page you will select which rights you want the users in this role to have.
   I. Security: Access to the Security module, allowing you to manage users and roles.
   II. Configuration: Access to the Configuration module, allowing you to manage system configurations.
   III. Create File Cabinets
   IV. System Audit Log: Access to the System Audit, within the Audit Log.

Role Deletions

1. Open the Role page in the accordion within the Security module.
2. You can use the search bar to search the role you are trying to delete, or find it manually.
3. You can use the ellipses menu and select delete or click the delete button next to the menu.

3.10.2 Users

Users are accounts that are created to provide access to the Dokmee ECM Application. In this list the admin user of the application will be able to create new users, delete old ones, and edit the system rights that user has configured.

User Creation

When the user clicks on the Security module in the left pane of the application the user will be greeted with a list of the roles. Towards the top of the page the user will be able to click on the "Users" which will display a list of currently created users within the system. The list can be filtered by user status or searched.

A user can be created by using the Add User button at the top left of the Users page.

1. The administrator will be prompted to input User ID, First Name, Last Name, Email, Email confirmation, and status.
2. After inputting user information, the administrator will be prompted to add the user to a role in order to provide security permissions of the desired role.
3. After role assignment there will be a confirmation page stating “A temporary pass will be sent to provided email. Once the new user signs in with the newly created credentials they will be able to assign their desired password.

User Deletion

To manage users from the same users page the administrator or user with the proper privileges will be able to select a user and to the right of that user in the ellipses menu the options available will be edit and delete. When edit is selected the administrator will be able to reset the password, view the User GUID, change the status of the user, and manage the assigned roles. Using the delete option will prompt the administrator with a confirmation page assuring the administrator that the user will be permanently deleted from the application.

3.11 Audit

3.11.1 Audit

The audit module allows you to track and report all activity that has taken place in a given timeframe on the system with detailed information of the action performed.

Template (Create, Delete, Clear)

Templates are particularly useful for recurring reporting requirements. The default template is Today’s Activity, and it will be selected whenever you access Audit module. Create templates with multi-line constraints and rules to allow you to view and create reports of specific types of activity and or filters.

Steps to Create:

1. Select the blank template from the dropdown.
2. Select the type of report you would like to generate. It can be all system activity

or specific file cabinet activity.
3. Select the report period to filter activities performed within a certain period. Predetermined time periods are available as well as a custom option that will allow users to select a certain period using dates.
4. Add any conditions you wish to apply to the report entries by clicking on the "Add" button to add a line of configurable conditions.
5. Once fully configured, the user can click on the Save button to create and save the new template with the configured settings. If the user is modifying a pre-existing template, the save option will also appear allowing the user to save the modifications made to the current template.

Steps to Delete:
1. To delete a template, the user will have to select the desired template to delete from the Template drop down menu.
2. Once the desired template to be deleted is selected from the dropdown, click the Trash icon below the Template dropdown menu.
3. Click OK to confirm the delete action.

Steps to Clear:
1. The user can clear the results by clicking on the clear button that replaced create report button to the right of the trash can.
2. Clearing the report will clear the entries of the result and keep the template that was selected or the report settings that were used to create the results.

Reset

The Reset button located towards the top right of the Audit module will reset the module to its defaults. This will clear the report area and return to the default Blank template.

Export CSV

The user has the option of exporting results as a CSV file for further review and/or as a documentation tool. Once the user has configured and ran the audit report or template, an export CSV button above the results will appear. When the user clicks the button an automatic download of the CSV file with the results will download to the default download directory configured in the browser.

How to read: Date, Entity, Entity Name, Action, Username, Description, Entity GUID, User GUID

Different activity and information is displayed based on the report type the user selects for the report.

- A cabinet report will display: Original Filename, File Version, Function, Action Source, File GUID.
- A system report will display: Entity, Entity Name, Action, Entity GUID, User GUID.
- Global information displayed on both report types: Date, Username, Description.

3.12 Configurations

3.12.1 Connection Settings

How to Change Connection Settings

- SQL: Provides information on the SQL connections settings. Here you can see the Host Name/IP and database username that is being used.
- Repository: Allows you to manage the repository location and folder.
  - You can select the 'Login Required' check mark if you want to use a specific windows user for ECM to access files.
- Websites: Provides the website information for the instance of Dokmee ECM.
  - IP or Public Domain hosting ECM.
  - Website Name: DokmeeECM by default.
  - Web Client: URL used to access the client.

3.12.2 SMTP

Allows you to configure SMTP settings for the application for the users to receive emails for the following features: Notifications, Password Reset, and Workflow.

Definitions

- Download Link Expiration: You can set a download link expiration to have control over download links sent within the system. You can increase or decrease the expiration by units of days.
- Enable SMTP: This switch is used to enable your SMTP connection.

- Mail Server: Select the type of mail server you are using. Once you select which mail server you are using, it will automatically populate the mail server URL, and port number.
- Email Address: This is the email address that will be used to send the emails from the ECM System.
- Password: Credentials to the email address.

3.12.3 Theme

Allows you to change the Color, Application Name, Application Language and Logo for Dokmee ECM.

Theme Options

- Color: Selecting a color will change the fill color for ECM.
- Application Name: Application name will change the text shown over the tab in your browser that corresponds to ECM.
- Application Language: Select the default language for ECM.
- Logos: Upload a PNG, JPG, or GIF file so it can be used for your logo, as well as your favicon. On the ellipses menu, you can select to preview or delete a logo/favicon.
  - Changing the ‘Logo’ will replace the Dokmee ECM logo in the header and login screen.
  - Changing the ‘Favicon’ will replace the Dokmee logo in the browser tab.
    - Favicons are recommended to be 16x16 for proper rendering.

Note: Available colors are dark grey, light grey, blue, navy, green, yellow, orange, red, pink, purple

3.12.4 Tools

Allows you to enable or disable the additional tools and add-ons provided by the application.

Enable/Disable

- To enable/disable a tool, users can click on the icon of the specific add-in.
- Enabling a tool allows for imports to come into the system from the specified solution.

3.12.5 Identity Management

Brief Description of Identity Management- Include server settings and information

Configuring Active Directory

Server Settings:

1. You can toggle the “First and Last Name Required” option. Once on, this will not allow import of users from your Active Directory server if they do not have a First Name, and Last Name field populated.

Active Directory Initial Setup:

1. On the first drop-down menu within Server Information, select Active Directory as your external connection.
2. For “Domain Connections” select New. (Domain Connections also allows a view of previous connections that has been made for quick access.)
3. Fill in the following fields:
   a. Hostname/IP
   b. Domain
   c. Username
   d. Password
4. Toggle “Enable”
5. Click Save

Assigning Roles:

1. In the “Server Information” dialog box, you will be able to see your Active Directory organizational units. (You can only assign ECM Roles to an Active Directory Group type.)
2. To find your group you can navigate through the different container types, or simply utilize the search box.
3. Once you find your group within the directory, you can either double click the group within the window or select the map button that will be on the right-hand side of the dialog.
4. A window will pop-up which allow you to assign your ECM role to the group. Here you will click the ECM role, and click the red button with an arrow that is signaling to the right.
5. Once the role appears under the “Assigned”, you can click save.
6. After this is complete, you will now see your connection under “Role Assignment.”

Role Assignment:

1. Here you will be able to see existing role assignments that have been made.
2. To edit the assignment, you can click on the gear icon on the right of the dialog. This will allow you to remove or add new roles to the Active Directory group.
3. To delete a role assignment, you can select the trash bin button.

Exceptions:

1. In this dialog, you will find any users that were not able to be added to ECM. For example, a user will not be added if a user with the same email address already exists within the solution.
2. You can choose to “resolve” by clicking the resolve button on the right side of the dialog.
3. This will allow for the AD user to replace the current ECM user.

Syncing:

1. In the server information section, you will see a button that is labeled “Sync”. This button is used to refresh your connection to the Active Directory server. This allows for any changes made on the server to be transmitted and applied on ECM. This is a manual trigger for the synchronization.
2. There is an Active Directory service that allows for this process of synchronization to be done automatically on a schedule.

Configuring Federation Services (SAML 2.0)

Configuring Federation Services (SAML 2.0):

1. On the first drop down menu within Server Information, select Federation Services (SAML 2.0).
2. You will need to supply your sign-in, sign-out URL, Public Certificate.
3. Click the browse button to find the Private Key within your directory.
4. Supply password in the password field.

Attributes:
You will want to get the appropriate attributes for the SAML configuration. Required attributes are: FirstName, LastName, Email, and Groups.

1. Place the appropriate attribute URL in their corresponding fields.
2. Click ‘Save” so the configuration is saved.
3. 'Delete’ option is there in case you want to delete this configuration/connection.

3.12.6 Services

Allows you to enable and disable services that run in the background for certain features in Dokmee ECM. Also provides the queue and logs for some of the services.

How to Toggle Services from Dokmee

- To enable/disable a service simply click on the dialog box of the service.
- To access the queue and logs for the services, make sure you selecting a service that offers the ‘More’ option on the bottom right to the dialog box.

- Queue: Pending items that are set to be processed by the service will show up in this list. Here you can see the status.
- Log: Processed items will show here. You will be able to see information relevant to the process, as well as see the status. This assist in troubleshooting since you will be able to see the status as 'Error' if something didn't process properly.
  - Clearing the log is done by hitting the 'Clear' button on the top left of the dialog within the log tab in the 'More' menu.
  - Searching within a log is done easily by using the search bar within the log tab in the 'More' menu.

NOTE: Enabling the services in Dokmee ECM will only enable the connection to the Windows service. The connection must be manually started within Windows Services. A icon will

3.12.7 Session Manager

The session manager allows users to manage session timeout period and active sessions of Dokmee ECM.

Session Timeout:

- You can select the time out limit for a session. This allows for sessions with no activity to be closed after a certain time to allow for licenses to become available.
  - Click 'Save' so configuration is stored.
  - IIS needs to be restarted for any changes to take effect.

NOTE: A cabinet owner can choose to have sessions anywhere from 5 min to 600 minutes

Sessions

You can view active sessions within the system.

- Session Start: Time stamp for login done by the user.
- Username: ECM username that corresponds to the session.

- First Name: First name of user that corresponds to the session.
- Last Name: Last name of user that corresponds to the session.
- Device: Webclient that is being used to access ECM.'

Closing a Session:

- To close a session, select the ellipses menu on the right of the dialog, and select 'End'.

3.12.8 Licensing

Provides detailed information about the installation of Dokmee ECM. The information includes version number, License information, Modules included concurrencies available, and maintenance expiration date.

Activating/Deactivating a License:

- Next to your license key there will be a 'Deactivate' button, pressing this will deactivate the key and allow you to enter a new one. For information on changing a key please refer to the installation portion in the user guide.

4 EULA - End User License Agreement

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VII. General Provisions

1. This Agreement will be governed by and construed in accordance with the laws of the State of Texas, United States. Exclusive legal venue for all disputes arising out of the Agreement shall be the courts of Texas.
2. Neither this Agreement nor any rights or obligations hereunder shall be assignable or otherwise transferable, in whole or in part, by either party without the prior written consent of the other party, except for an assignment of this Agreement in its entirety to a party that acquires all of the assets, equity and operations of either party hereto, provided that prior

written notice of any such assignment is provided to the other party and that the assignee and assignor in such assignment shall promptly execute all documents reasonably required by the other party to confirm the assignment.
3. Failure by either party to enforce any provision of this Agreement will not be deemed a waiver of future enforcement of that or any other provision.
4. If for any reason a court of competent jurisdiction finds any provision of this Agreement, or portion thereof, to be unenforceable, that provision of the Agreement will be enforced to the maximum extent permissible so as to affect the intent of the parties, and the remainder of this Agreement will continue in full force and effect.
5. The prevailing party in any action to enforce the Agreement shall be entitled to recover costs and expenses including, without limitation, reasonable attorneys' fees.
6. The parties agree that a material breach of this Agreement adversely affecting Office Gemini's Intellectual Property Rights in the Software or Documentation would cause irreparable injury for which monetary damages would not be an adequate remedy and Office Gemini shall be entitled to equitable relief in addition to any remedies it may have hereunder or at law.