

## User guide

Open Bee™  
Portal





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- [Description](#)
- [Release notes](#)
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**Open Bee™ Portal is a software solution that can unite, through a single interface and a single infrastructure, all the company's information and documents. Designed to store and index thousands of paper and electronic documents, Open Bee™ Portal provides a quick and easy access to company's information via a simple Internet browser such as Internet Explorer or Google Chrome.**

The Open Bee™ Portal user guide includes recommendations, tips and suggestions to get the best out of Open Bee™ Portal. Please make sure to familiarize yourself with the concepts and configuration procedures described in this guide and the Open Bee™ Scan documentation, a document filing module.

For more information, or to access folders dealing with topics raised in this document, please also refer to the Open Bee™ website at the following address: <http://www.myopenbee.com/http://www.openbee.com>

This manual has been written and published under the Open Bee™ control, it covers the latest product descriptions and specifications.

All terms, product references, recommendations, and the content can be changed without prior notice.

Open Bee™ reserves the right to change, without prior notice, the specifications and information contained in this manual and will not be held responsible for any damages (including consequential) caused by the information presented here, including, and without being limited, to typographical and other errors related to the manual.





# 1 ADMINISTRATOR GUIDE

The Administration interface allows you to create users and groups of users, to manage deleted documents and customize the general configuration of Open Bee™ Portal.

To access the Administration module, click on the "**Administration**" icon.

System	Users	Documents	Workflow
<ul style="list-style-type: none"><li> <b>DMS Settings</b> Set general parameters of your Document Management Solution</li><li> <b>Customization</b> Customize background picture...</li><li> <b>Email customisation</b> Change sent emails content</li><li> <b>License</b> View and edit license details</li><li> <b>Emails</b> Preview and send again all emails generated by the system</li><li> <b>Transactions</b> View transactions and check their integrity</li></ul>	<ul style="list-style-type: none"><li> <b>Users</b> Add, edit or delete users</li><li> <b>Groups</b> Manage group</li><li> <b>Roles</b> Manage user roles</li><li> <b>LDAP Servers</b> Add, edit and delete LDAP servers used to import users and groups</li><li> <b>Alias</b> View and edit users alias</li><li> <b>Users notifications</b> View and edit users notifications</li><li> <b>Extranet</b> Manage communication spaces with external users</li></ul>	<ul style="list-style-type: none"><li> <b>Filing categories</b> View and edit document types</li><li> <b>Secured Conservation Spaces</b> Add or view Secured Conservation Spaces</li><li> <b>Folder types</b> Add, edit, delete the folders types</li><li> <b>Links</b> View and edit dynamic links between document types</li><li> <b>Stamps</b> View and edit workflow stamps</li><li> <b>Open Bee™ Scan O.C.S</b> View and edit Open Bee™ Scan O.C.S settings</li><li> <b>Share</b> View and modify shared documents</li><li> <b>Recycle bin</b> View and manage deleted documents and folders</li><li> <b>Digital signature</b> Manage a company signing certificate and the rules of associated application</li></ul>	<ul style="list-style-type: none"><li> <b>Workflow Designer</b> View and edit document approval workflows</li><li> <b>List of tasks</b> Manage pending tasks or process in Workflow (Validation, rejection, participant change...)</li><li> <b>Working hours</b> Manage working hours and bank holidays</li></ul>



## 1.1 Users

The administrator can :

- add
- remove
- modify the users.

This function is essential, it allows to give every person :

- a user account,
- a password
- manage access rights to documents

Click on **"Users"**, from **"Administration"** \ **"Users"**

### Administration

System	Users	Documents	Workflow
<ul style="list-style-type: none"><li> <b>DMS Settings</b> Set general parameters of your Document Management Solution</li><li> <b>Customization</b> Customize background picture...</li><li> <b>Email customisation</b> Change sent emails content</li><li> <b>License</b> View and edit license details</li><li> <b>Emails</b> Preview and send again all emails generated by the system</li><li> <b>Transactions</b> View transactions and check their integrity</li></ul>	<ul style="list-style-type: none"><li> <b>Users</b> Add, edit or delete users</li><li> <b>Groups</b> Manage group</li><li> <b>Roles</b> Manage user roles</li><li> <b>LDAP Servers</b> Add, edit and delete LDAP servers used to import users and groups</li><li> <b>Alias</b> View and edit users alias</li><li> <b>Users notifications</b> View and edit users notifications</li><li> <b>Extranet</b> Manage communication spaces with external users</li></ul>	<ul style="list-style-type: none"><li> <b>Filing categories</b> View and edit document types</li><li> <b>Secured Conservation Spaces</b> Add or view Secured Conservation Spaces</li><li> <b>Folder types</b> Add, edit, delete the folders types</li><li> <b>Links</b> View and edit dynamic links between document types</li><li> <b>Stamps</b> View and edit workflow stamps</li><li> <b>Open Bee™ Scan O.C.S</b> View and edit Open Bee™ Scan O.C.S settings</li><li> <b>Share</b> View and modify shared documents</li><li> <b>Recycle bin</b> View and manage deleted documents and folders</li><li> <b>Digital signature</b> Manage a company signing certificate and the rules of associated application</li></ul>	<ul style="list-style-type: none"><li> <b>Workflow Designer</b> View and edit document approval workflows</li><li> <b>List of tasks</b> Manage pending tasks or process in Workflow (Validation, rejection, participant change...)</li><li> <b>Working hours</b> Manage working hours and bank holidays</li></ul>






## Administration

System ▾ Users ▾ Documents ▾ Workflow ▾

Users

Actions on the selection ▾ **Add a user** Import ▾

Display 25 ▾ items per page


Actions	Full name ▾	Login ▾	Email ▾	Group	Role ▾	Last connection ▾	LDAP Server	Status ▾
<input type="checkbox"/>	 Andrew Smith	Andrew	asmith@myopenbee.org	Users	user			Enabled
<input type="checkbox"/>	 John Dumond	John	jdumond@myopenbee.org	Users	user			Enabled
<input type="checkbox"/>	 Natasha St Martin	Natasha	nstmartin@myopenbee.org	Users	user			Enabled
<input type="checkbox"/>	 Patricia Durand	Patricia	pdurand@myopenbee.org	Users	user			Enabled
<input type="checkbox"/>	 Peter Martin	Peter	pmartin@myopenbee.org	Users	user			Enabled
<input type="checkbox"/>	 Romain Arpin	r.arpin@openbee.com	r.arpin@openbee.com	Administrators, Users	administrator	2016-04-15 16:19		Enabled
<input type="checkbox"/>	 Sandra Dujardin	Sandra	sdujardin@myopenbee.org	Users	user			Enabled

## 1.1.1 Add a user

Click on the "Add a user" icon.

## Administration

System ▾ Users ▾ Documents ▾ Workflow ▾

 Add a user

Full name:


Email:

☒ Use the email address as the username

☒ Manage user password and picture

Password:

Re password:

Picture: 

Role:

☐ Manage user notification parameters

A new user can be added using two different ways :

- The new user's email address is known : fill the required fields and click « **Save** ».
- The new user's email address is unknown : uncheck the box (use the email address as user name), fill the user name which will be used to generate a unique user name in the database.





**Note :** If the new user's password is not specified by the administrator, a default password (*init*) will be assigned to him.

The user receives an email notification as below :

**Email preview**

From:  admin@openbeecloud.com

Date: 2016-03-28 13:10

To:  myopenbee@openbee.com

Carbon copy:

Subject: Confirmation nouveau compte utilisateur

Bonjour arthur,

Votre compte utilisateur a été créé dans **Open Bee™ Portal**

Vous pouvez vous connecter en utilisant les informations suivantes :

Adresse Email : myopenbee@openbee.com

Veuillez cliquer sur ce lien pour définir votre mot de passe :

<https://userguide-en.openbeecloud.com/resetPassword/8a3540842f37f7bda10c5d96154ac0dd>

Send again


### 1.1.2 Request a user's password change

Ability to force the user to change their password at next login.








#### 1. Click on the user name

Administration

System ▾ Users ▾ Documents ▾ Workflow ▾

 Users

Actions on the selection ▾ Add a user Import ▾ Display 25 ▾ Items per page

<input type="checkbox"/>	Actions	Full name ▴ ▾	Login ▴ ▾	Email ▴ ▾	Group	Role ▴ ▾	Last connection ▴ ▾	LDAP Server	Status ▴ ▾
<input type="checkbox"/>		Andrew Smith	Andrew	asmith@myopenbee.org	Users	user			Enabled
<input checked="" type="checkbox"/>		John Dumond	John	jdumond@myopenbee.org	Users	user			Enabled
<input type="checkbox"/>		Natasha St Martin	Natasha	nstmartin@myopenbee.org	Users	user			Enabled
<input type="checkbox"/>		Patricia Durand	Patricia	pdurand@myopenbee.org	Users	user			Enabled
<input type="checkbox"/>		Peter Martin	Peter	pmartin@myopenbee.org	Users	user			Enabled
<input type="checkbox"/>		Romain Arpin	r.arpin@openbee.com	r.arpin@openbee.com	Administrators, Users	administrator	2016-04-11 10:48		Enabled
<input checked="" type="checkbox"/>		Sandra Dujardin	Sandra	sdujardin@myopenbee.org	Users	user			Enabled



**2. The window appears, check the "Force the user to change password at next login" box and click "Save".**

Subscriptions notification frequency

Comments notification frequency

Assign the User to Groups

Administrators  
External users  
Users

>  
<

Administrators  
Users

☐ Force the user to change password at next login

Save

**3. A confirmation message indicates that the information is successfully updated.**

**4. Then log in as user, then enter the username / password, before clicking on "Save"**

Password

---

Current password

The password must contain 8 characters minimum, at least one uppercase, one lowercase, and one digit or one special character.

New password

Confirm new password

Save

**5 . A confirmation message is displayed when connecting: "Password changed successfully"**



### 1.1.3 Modify user preferences

The user can modify his preferences by clicking on "**Preferences**".

Andrew Smith

My profil   Manage reminders   Manage subscriptions   My documents

Login	<input type="text" value="Andrew"/>
Full name	<input type="text" value="Andrew Smith"/>
Password	<input type="password"/>
Confirm new password	<input type="password"/>
Email	<input type="text" value="asmith@myopenbee.org"/>
Telephone	<input type="text" value="450640551"/>
Workflow tasks notification frequency	<input type="text" value="Immediately"/>
Reminders notification frequency	<input type="text" value="Immediately"/>
Subscriptions notification frequency	<input type="text" value="Immediately"/>
Comments notification frequency	<input type="text" value="Immediately"/>

Profil picture (minimum 150 x 150)

[Browse...](#)



[Save configuration](#)

Modify preferences and click "**Save**" to save the modification.

The confirmation message appears "Preferences successfully updated"

**Note :**

If the user checks email notification, he will receive email notifications for folders which he has subscribed for.


In order to use it, it is mandatory that the settings for sending emails via SMTP server have been configured from the administration interface.





### 1.1.4 De-activate a user

Check the user's box to de-activate it. A de-activated user can be reactivated at any time.

 Open Bee™ Portal does not allow to delete a user ; Any de-activated user will be placed at the end of the list in order to facilitate the navigation. This functional choice allows to keep a history of all actions performed by all users.

### 1.1.5 Users integration from a LDAP source

Users and groups integration from a LDAP source

### 1.1.6 Importing a CSV file

This feature allows to create multiple users in a CSV file and then import it.

Users will automatically be saved when the import is completed.

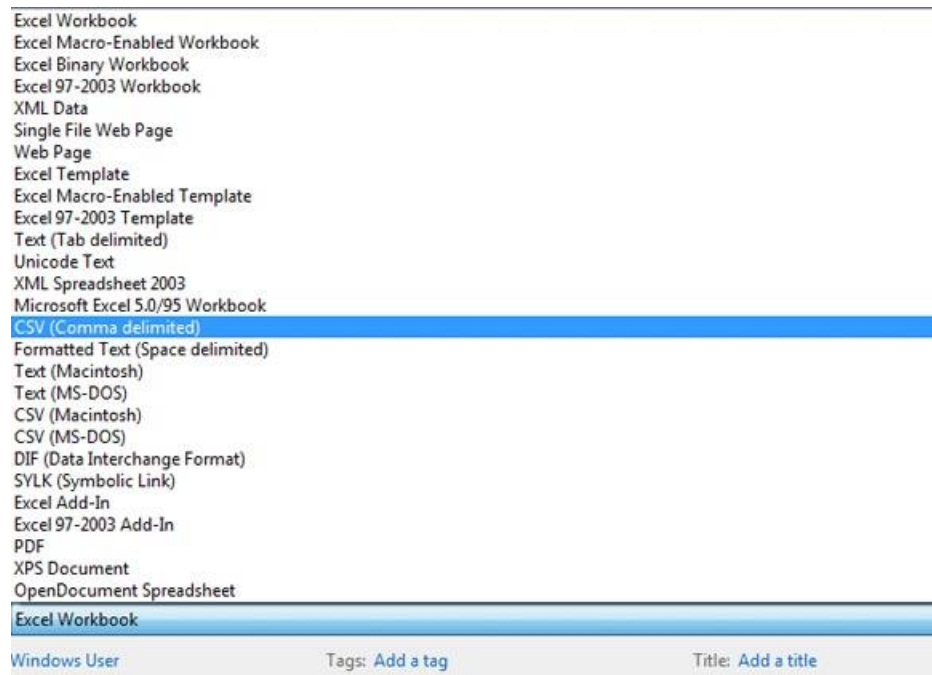
To import a CSV file, simply click on "CSV"

**Example of requested CSV file :**

**User name - Full name - Email - Phone number - Password**

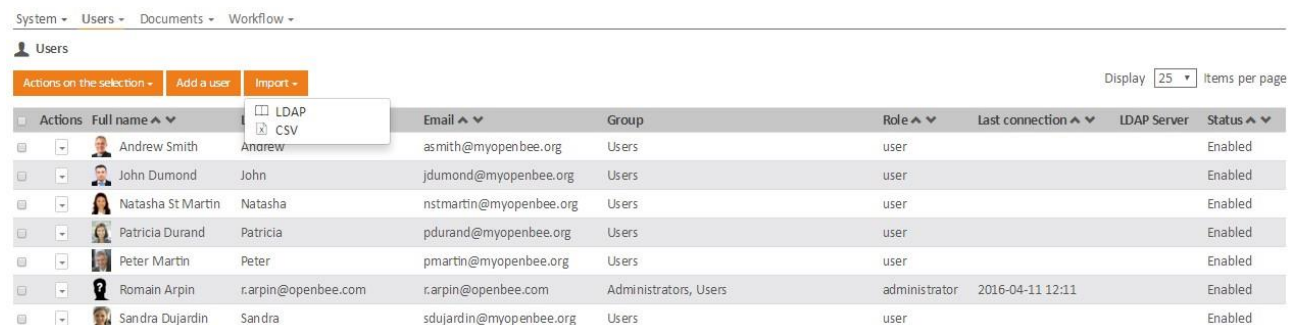
	A	B	C	D	E	F
1	Login	Full name	Email	Phone	Password	
2	Andrew	Andrew Smith	<a href="mailto:adrew@bijou.com">adrew@bijou.com</a>	33450640551		
3	John	John Dumond	<a href="mailto:john@bijou.com">john@bijou.com</a>	33450640553		
4	Natasha	Natasha St Martin	<a href="mailto:natasha@bijou.com">natasha@bijou.com</a>	33450640554		
5	Peter	Peter Martin	<a href="mailto:peter@bijou.com">peter@bijou.com</a>	33450640555		
6	Sandra	Sandra Dujardin	<a href="mailto:sandra@bijou.com">sandra@bijou.com</a>	33450640556		
7						
8						
9						
10						
11						
12						

Save your document by selecting CSV for the file type :



From the "Users" menu select "Import" \ "CSV".

## Administration



Load the CSV file from the "**Browse**" button



## Administration

System ▾ Users ▾ Documents ▾ Workflow ▾

### Import users from CSV file

Upload a CSV File

Browse...

☐ Check this box if the CSV file contains a header

Separator

;

Import

Import Users from a CSV file

Important: the CSV file structure must resemble the following

- Login
- Full name
- Email
- Mobile
- Password
- Role (optional)
- Group ID (optional)
- Alias (optional)

Check the box if the document contains a header and select the separator from the drop-down menu.

Click "**Import**".

Once the operation is done, the confirmation message "**Import from CSV File successfully done**" appears

Users will automatically be added in the "**Users**" list.

Utilisateurs				LDAP   CSV ▾	
<input type="checkbox"/> Nom complet	<input type="checkbox"/> Nom d'utilisateur	<input type="checkbox"/> Email	<input type="checkbox"/> Téléphone portable		
<input type="checkbox"/> Administrator	admin				
<input type="checkbox"/> Celine Jamet	Celine	c.jamet@myopenbee.org			
<input type="checkbox"/> Ali Ismail	Ali	a.ismail@myopenbee.org			



## 1.2 Groups

The administrator can:

- add
- remove
- modify the groups of users.

It is essential to associate the created users to one or several group(s).

The membership in a group will allow to define users roles and permissions.

Click on **"Groups"**, from **"Administration"** \ **"Groups"**

### Administration

The screenshot shows the 'Administration' menu with four main sections: System, Users, Documents, and Workflow. The 'Users' section is expanded, and the 'Groups' option is highlighted with a red box. The 'Groups' option has a sub-menu item 'Manage group'.

### Administration

The screenshot shows the 'Groups' page in the Open Bee Administration interface. The 'Add group' button is highlighted with a red box. Below the button is a table listing the existing groups.

Actions	Group name	Users	LDAP Server
<input type="checkbox"/>	Administrators	2	
<input type="checkbox"/>	External users	0	
<input type="checkbox"/>	Users	8	






### 1.2.1 Add a group

Click on the **"Add a group"** icon.

## Administration

System ▾ Users ▾ Documents ▾ Workflow ▾

 Add a new group

Group name :

Save

Enter the group name and click **"Save"**

A message confirms the creation of the group : **"Group successfully saved"**


### 1.2.2 Remove a group

Select the group to be removed then click on the **"Remove"** icon.

A message confirms the group removal.

### 1.2.3 Assign users to a given group

Click on the group to which users will be assigned.

 Manage group

Group name

Administrators

Romain Arpin ( r.arpin@openbee.com )



Romain Arpin ( r.arpin@openbee.com )

Save



Select the users to assign to the group by using the button ">" then click **"Save"** to validate.

A confirmation message appears **" Group successfully updated"**.

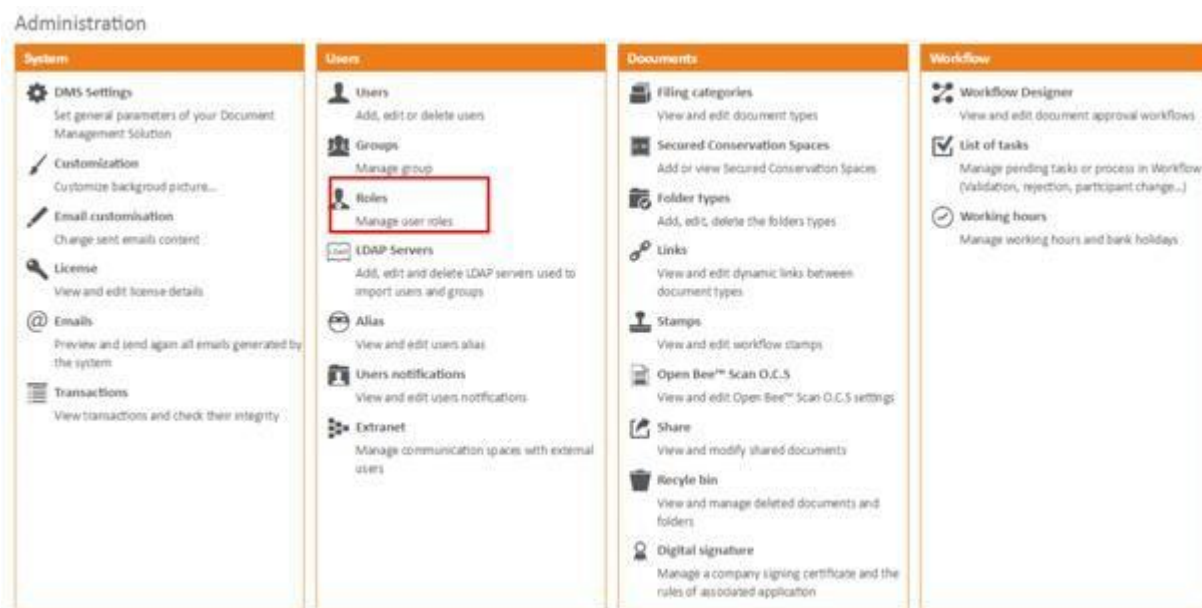
## 1.2.4 Users and group of users integration from an LDAP source

[Users and groups integration from a LDAP source](#)

## 1.3 Roles

Roles are used to define different users typologies and limit access to some features of the application.

Click on **"Administration \ Roles"**





### 1.3.1 System Roles

By default, Open Bee™ Portal includes all " System " roles :

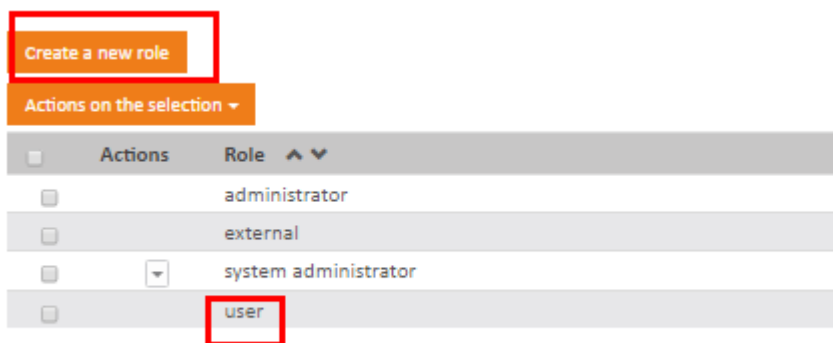
- **Administrator** : provides a complete access to all the application and administration features ,except Espace Sécurisé de Conservation.
- **Functional Administrator** : allows access to the administration of a Espace Sécurisé de Conservation and other administrative functions: filing rules, extranet, transactions and editing of users who do not have the Administrator's role or Functional Administrator's role ,
- **User** : provides an access to all features, except the ones related to administration.
- **External** : only provides an access to documents. Besides, this particular role limits the user to a sub-folder of the folder tree, which strongly limits its ability to use the product. The users created for an [Extranet](#) possess this role.

System roles are not removable, but can be modified to some extent.

### 1.3.2 Add and modify a role

#### 2.9.3

- To add a new role, click on the "**Create a new role**" button.
- To modify a role, click on the role name.





In both cases, the following form appears:

Role modified

Name

Default group

Permissions

- ☒ Documents
- ☒ Dashboard
- ☒ Filing
- ☒ Assignment of users in groups
- ☐ Administration
- ☐ Assign role to users
- ☐ DMS Settings
- ☐ Customization
- ☐ License
- ☐ Emails
- ☐ Users
- ☐ Groups
- ☐ Alias
- ☐ Users notifications
- ☐ Extranet
- ☐ Digital signature
- ☐ Filing categories
- ☐ Folder types
- ☐ Stamps
- ☐ Open Bee™ Scan O.C.S
- ☐ Share
- ☐ Recycle bin
- ☐ Workflow Designer
- ☒ List of tasks
- ☐ Working hours
- ☐ Links
- ☐ Transactions
- ☐ Roles
- ☐ Secured Conservation Spaces
- ☐ MANAGE\_LDAP

- **Name** : role name, as it appears afterwards in the user creation form.
- **Default Group** : group to which a user is automatically assigned when created with this role.
- **Permissions** : application features that the user assigned to this role can use .
- **Permissions details**
- **Dashboard** : access to the dashboard
- **Documents** : access to the navigation in the documents tab
- **Filing** : access to the filing zone and the "drop zone"



- **Administration** : mandatory for an access to the administration section. Checking this role alone allows to only display the "**Administration**" menu. Each of the administration sub-sections has a corresponding permission.
- **Manage a group of users** : allows to assign users to a group
- **Manage an administrator account** : allows to modify the users accounts with the "**administrator**" and "**functional administrator**" roles.
- Other permissions correspond exactly to the different sections of the [Administrator Guide](#)

## 1.4 Users and groups integration from a LDAP source

### 1.4.1 Introduction

Instead of manually creating users in Open Bee™ Portal, these can be imported from an LDAP authentication source (typically an [Active Directory](#)).

It insures that the users and the groups are correctly configured, involving a limited intervention from the administrator.

The user doesn't need to remember an additional password for the EDM system as its authentication will be deported on the LDAP directory.

### 1.4.2 Functioning and different import modes

Several import modes are available :

1. Import all groups and users present in the LDAP
2. Import certain groups
3. Import certain groups and all users belonging to these groups
4. Import certain users
5. Import certain users and all the groups to which they belong

Depending on the chosen mode during the import, all or part of the changes made in the LDAP directory will be automatically reflected in Open Bee™ Portal:



- User name modification
- Group name modification
- Modification of the users from a group
- Modification of the groups for a user
- Groups addition
- Users addition

### 1.4.3 Import

The import function concerns the groups and users. It is accessible from the "**Users**" or "**Groups**" sections in the "**Administration**" section.

## Administration

System ▾ Users ▾ Documents ▾ Workflow ▾


 Users

Actions on the selection ▾

Add a user


Import ▾

<input type="checkbox"/>	Actions	Full name ^ ▾			E
<input type="checkbox"/>		 Andrew Smith	Andrew		a

 LDAP  
 CSV

## Administration




System ▾ Users ▾ Documents ▾ Workflow ▾

 Groups

Actions on the selection ▾

Add group

Import ▾

<input type="checkbox"/>	Actions	Group name ^ ▾		Users	LDAP Server
<input type="checkbox"/>		Administrators		1	
<input type="checkbox"/>		External users		0	
<input type="checkbox"/>		Users		7	

 LDAP





If your LDAP server is already registered in the system (in a previous import), select it from the list of available servers.

Otherwise, register a new server by clicking the **"Add"** button, which will open a window allowing you to fill in the login information.

The LDAP servers list is editable at any time in the **"Administration \ LDAP servers"** section.

## Administration

System ▾ Users ▾ Documents ▾ Workflow ▾

### Import users from LDAP Directory

LDAP Server :

Enter Keyword(s) :

☐ Use e-mail as username

☐ Import and automatically update all the LDAP server groups and users

☒ Import users: manually select users to import and update automatically

☐ Automatically import the groups associated with selected users

☐ Import groups: manually select the groups to import and update automatically



## Add

Domain suffix :

Domain controller :

☐ Use SSL

Login :

Password :

- Import all groups and users present in the LDAP (case 1. described above):
  - Check the **"Import and automatically update all the LDAP server groups and users"** box
- Import only certain groups or users:
  - Uncheck the **"Import and automatically update all the LDAP server groups and users"** box
  - Select users or groups to be imported

## Import users

- ☐ Import and automatically update all the LDAP server groups and users
- ☒ Import users: manually select users to import and update automatically
- ☐ Automatically import the groups associated with selected users
- ☐ Import groups: manually select the groups to import and update automatically



### Import groups

- ☐ Import and automatically update all the LDAP server groups and users
- ☐ Import users: manually select users to import and update automatically
- ☒ Import groups: manually select the groups to import and update automatically
- ☐ Automatically import users belonging to the selected groups

Validate

Click "**Validate**" to finish the operation.

**Note :** It is possible to import automatically:

- Groups associated to the selected users
- Users associated to the selected groups

## 1.5 Single Sign On in an Active Directory environment

This function allows a user to access Open Bee™ Portal without entering his password, providing that the user is logged in to his Windows session.

### 1.5.1 Prerequisites for SSO connection in Open Bee™ Portal

- The server is part of an Active Directory domain
- The user is imported from the Active Directory LDAP
- Users logged in the domain, on their Windows device
- The user's browser has been configured as described below
- The SSO authentication is activated in the [General configuration](#)



## 1.5.2 Configure browsers for SSO

### 1.5.2.1 Internet Explorer

Make sure that "**Activate Windows integrated authentication**" into the advanced Internet Explorer options is checked.

Consider adding the URL to the list of trusted websites of the local Intranet under the "**Security**" tab in the Internet Explorer options.

### 1.5.2.2 Firefox

Type "**about:config**" in the address bar and press enter.

Modify the "network.negotiate-auth.delegation.uris" value and add the domain name for which you want to activate the automatic sending of information.

**Note** : it may be necessary to also change the value "network.automatic-ntlm-auth.trusted-uris" and add https:// or http:// follow by the name of the server on the domain.

## 1.5.3 Frequent problems

On Windows Vista or Seven :

- The navigator sends back an Internal Server Error
- Add a value in the register base : HKEY\_LOCAL\_MACHINE/SYSTEM/CurrentControlSet/Control/Lsa
- Add a new value DWORD
- Rename it « LmCompatibilityLevel » put it to « 1 »

## 1.6 Users notifications

### [Users notifications](#)

A dedicated section of the administration allows to view and manage users notifications.



## Administration

System	Users	Documents	Workflow
<ul style="list-style-type: none"><li><b>DMS Settings</b> Set general parameters of your Document Management Solution</li><li><b>Customization</b> Customize background picture...</li><li><b>Email customisation</b> Change sent emails content</li><li><b>License</b> View and edit license details</li><li><b>Emails</b> Preview and send again all emails generated by the system</li><li><b>Transactions</b> View transactions and check their integrity</li></ul>	<ul style="list-style-type: none"><li><b>Users</b> Add, edit or delete users</li><li><b>Groups</b> Manage group</li><li><b>Roles</b> Manage user roles</li><li><b>LDAP Servers</b> Add, edit and delete LDAP servers used to import users and groups</li><li><b>Alias</b> View and edit users alias</li><li><b>Users notifications</b> View and edit users notifications</li><li><b>Extranet</b> Manage communication spaces with external users</li></ul>	<ul style="list-style-type: none"><li><b>Filing categories</b> View and edit document types</li><li><b>Secured Conservation Spaces</b> Add or view Secured Conservation Spaces</li><li><b>Folder types</b> Add, edit, delete the folders types</li><li><b>Links</b> View and edit dynamic links between document types</li><li><b>Stamps</b> View and edit workflow stamps</li><li><b>Open Bee™ Scan O.C.S</b> View and edit Open Bee™ Scan O.C.S settings</li><li><b>Share</b> View and modify shared documents</li><li><b>Recycle bin</b> View and manage deleted documents and folders</li><li><b>Digital signature</b> Manage a company signing certificate and the rules of associated application</li></ul>	<ul style="list-style-type: none"><li><b>Workflow Designer</b> View and edit document approval workflows</li><li><b>List of tasks</b> Manage pending tasks or process in Workflow (Validation, rejection, participant change...)</li><li><b>Working hours</b> Manage working hours and bank holidays</li></ul>

This interface works the same way as the one allowing a user to manage [ses souscriptions](#), with some particularities:

- All users notifications are displayed, it is possible to filter by user.



- To add a notification, it is necessary to select a user in the first place.




## Administration


System ▾ Users ▾ Documents ▾ Workflow ▾

 Turn notification on

User:

Select a folder

- ▾  Root folder
  -  My documents
  -  Bijou Ltd

 **Romain Arpin**  
r.arpin@openbee.com

Get notifications





## 1.7 Extranet

The "**Extranet**" section simplifies the availability of documents to external users.

Customer Relation or HR Relation Portals are the most common Extranet use cases.

The use of an extranet requires a license allowing the creation of external users.

Click on "**Administration**" \ "**Extranet**" to access the administration space.

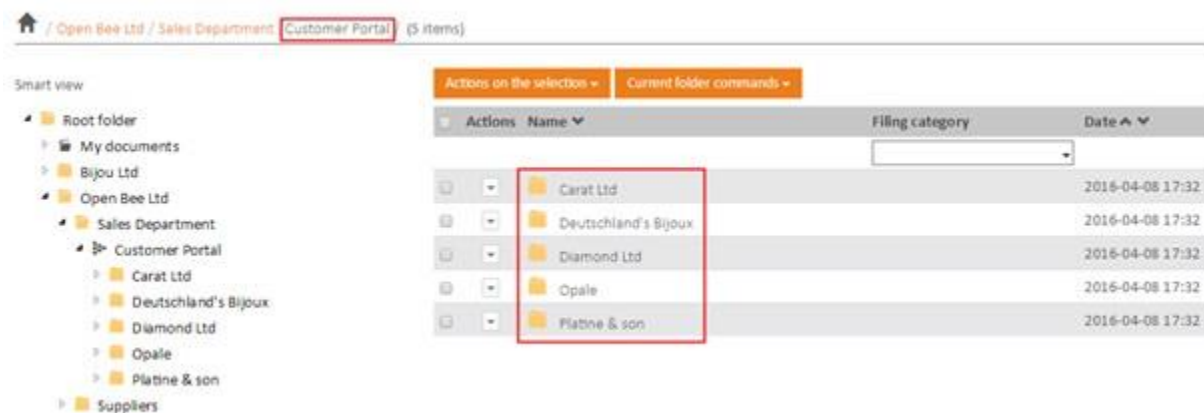
### 1.7.1 Prerequisites and operating principle

An extranet requires a personal folder for each user having access to the extranet.

These folders must meet several prerequisites:

- Being grouped in a "parent" folder called the extranet "**root folder**".
- Being named in order to identify the user in a unique way. Example: a serial number or social security number. Using a "name" is not recommended due to the risk of having two users with the same name. The combination of an identifier and a name is ideal since it allows both to ensure the uniqueness of the file while ensuring that the name is speaking for a user.

Below is an example of an extranet tree structure: "**Customer Portal**" is the extranet root folder and contains users' folders.



Extranet functions as follows:

- Publish documents towards users in their own folders.
- Create accounts for those users and associate them with the corresponding folders by automatically applying the necessary permissions.



## 1.7.2 Create a new extranet

Click on **"Add an extranet"**

### Administration

System ▾ Users ▾ Documents ▾ Workflow ▾

 Extranet

**Add an extranet**

Select the root folder of the extranet:

 / Open Bee Ltd / Sales Department / Customer Portal / (5 items)

Smart view

- Root folder
  - My documents
  - Bijou Ltd
  - Open Bee Ltd
    - Sales Department
      - Customer Portal
        - Carat Ltd
        - Deutschland's Bijoux
        - Diamond Ltd
        - Opale
        - Platine & son

## 1.7.3 Extranet users

### 1.7.3.1 Create users

Once created, the extranet automatically detects users' folders and suggests to create external users for those folders.



Administration

System ▾ Users ▾ Documents ▾ Workflow ▾

Extranet

**Add an extranet**

**Extranet list**

Customer Portal

Root folder : /Open Bee Ltd/Sales Department/Customer Portal/

Users to be created: [Users](#)

Folders not linked to any user have been detected in this extranet.  
Use the form below to create new external users to be associated to these folders.

**Edit using Excel**

Folder Name	Full name	Email	Password (optional)
Carat Ltd	<input type="text" value="Carat Ltd"/>	<input type="text"/>	<input type="text"/>
Deutschland's Bijoux	<input type="text" value="Deutschland's Bijoux"/>	<input type="text"/>	<input type="text"/>
Diamond Ltd	<input type="text" value="Diamond Ltd"/>	<input type="text"/>	<input type="text"/>
Opale	<input type="text" value="Opale"/>	<input type="text"/>	<input type="text"/>
Platine & son	<input type="text" value="Platine &amp; son"/>	<input type="text"/>	<input type="text"/>

**Submit**

**From the interface:**

- For all or some of the folders of the extranet, enter the name, email and an optional password for the user to create.
- Click on **"submit"**.

**For excel import:**

- Click on **"Edit using Excel"** then on **"Export to CSV"**.

**Edit using Excel**

**Export to CSV**

Import from CSV

Folder Name	Full name	Email	Password (optional)
Carat Ltd	<input type="text" value="Carat Ltd"/>	<input type="text"/>	<input type="text"/>
Deutschland's Bijoux	<input type="text" value="Deutschland's Bijoux"/>	<input type="text"/>	<input type="text"/>
Diamond Ltd	<input type="text" value="Diamond Ltd"/>	<input type="text"/>	<input type="text"/>
Opale	<input type="text" value="Opale"/>	<input type="text"/>	<input type="text"/>
Platine & son	<input type="text" value="Platine &amp; son"/>	<input type="text"/>	<input type="text"/>

**Submit**

- A CSV file containing the list of files is downloaded :
- Open the file in Excel and complete columns "Full Name", "Email" and "Password" (optional).

Folder Name	Full name	Email	Password
Carat Ltd	John Smith	<a href="mailto:john@carat.com">john@carat.com</a>	
Deutschland's Bijoux	Peter Pfeiffer	<a href="mailto:ppfeiffer@bijoux.de">ppfeiffer@bijoux.de</a>	
Diamond Ltd	Mike Jackson	<a href="mailto:mj@diamond.co.uk">mj@diamond.co.uk</a>	
Opale	Danni Basco	<a href="mailto:purchase@opale.com">purchase@opale.com</a>	
Platine & son	Natasha McKenzie	<a href="mailto:natasha@platine-son.com">natasha@platine-son.com</a>	



- Save the file .
- Click again on **"Edit using Excel"** then on **"Import from CSV"**.

Full name	
Carat Ltd	<input type="text" value="Carat Ltd"/>
Deutschland's Bijoux	<input type="text" value="Deutschland's Bijoux"/>
Diamond Ltd	<input type="text" value="Diamond Ltd"/>
Opale	<input type="text" value="Opale"/>
Platine & son	<input type="text" value="Platine &amp; son"/>

- Select the CSV file that you have completed. The users are created and associated to the extranet folders.

Users will receive their access codes by email.

**Extranet users belong to the group " External users " . For data privacy reasons, by default, this group does not have access to any folder.**

**It is thus necessary to add reading permissions on the extranet root folder (apply recursively on the sub-folders) before the users can consult the content.**

### 1.7.3.2 Create multiple users for the same Extranet folder

It is possible to associate several external users to the same extranet folder by using the CSV import.

To do this, duplicate the line associated to the folder in the CSV file and enter the users' information to create additional users.

In the example below, two users «John Smith» and «Mickael Parker» will be created and will have access to the same folder: «Carat Ltd».

Folder Name	Full name	Email	Password
Carat Ltd	John Smith	<a href="mailto:john@carat.com">john@carat.com</a>	
Carat Ltd	Mickael Parker	<a href="mailto:mickael@carat.com">mickael@carat.com</a>	



### 1.7.3.3 Attach and detach users from a folder

Once created, the users attached to the folder can be consulted from the **"Folders"** tab.

Extranet

Add an extranet

Extranet list

TEST

Root folder : /TEST/

Users to be created Folders Suivi Automatic reminder Permissions Configuration

Folder Name ^ v	Users
TEST1	newtestopenbee
Test2	Please select a user

Click on the pencil to modify the users attached to the folder. You can also add or delete users with access to the folder.

A simple click on the user allows to change it the same way as described in **"Administration \Users"** section.

### 1.7.3.4 Creating users automatically

The **"Configuration"** tab allows to define two metadata which will be used to identify the name and the email of the users. If this configuration is enabled, the extranet will automatically create the user if it does not exist when filing/archiving the first document.

Extranet

Add an extranet

Extranet list

TEST

Root folder : /TEST/

Users to be created Folders Suivi Automatic reminder Permissions Configuration

To create users automatically, select the metadata that define the user email address and full name.

Filing category

Metadata : Email

Metadata : Full name

Save

This feature allows 100% automation of document distribution to customers or employees.

### 1.7.3.5 Permissions

The **"Permissions"** tab allows to configure permissions that will be automatically applied to different users when creating extranet folders.

1. By default, only a set of permissions is defined for the external user who will be associated with the extranet folder. You can change it.



2. The "+" button allows you to assign permissions for other users of Open Bee™ Portal. Consider adding permissions here for "standard" users who will have to access the various files on the extranet.
3. You can change the Extranet folder manager. This option is visible only if you have a license that includes the [Digital Safe Box](#). It allows you to set up an Extranet, each folder is a Secure Space of Conservation.

#### Permission configuration

Define here default permissions that will be apply on extranet folders

Extranet users	All	View	Edit	Administration
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Read <input type="checkbox"/> Apply watermark <input checked="" type="checkbox"/> Print <input checked="" type="checkbox"/> Download <input checked="" type="checkbox"/> Preview <input type="checkbox"/> History	<input checked="" type="checkbox"/> Add folder <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Delete <input checked="" type="checkbox"/> Add a document <input type="checkbox"/> Thread <input checked="" type="checkbox"/> Manage versions	<input type="checkbox"/> Manage permissions <input type="checkbox"/> Digital signature <input type="checkbox"/> Export metadata
Carat S.a.r.l	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Read <input type="checkbox"/> Apply watermark <input checked="" type="checkbox"/> Print <input checked="" type="checkbox"/> Download <input checked="" type="checkbox"/> Preview <input checked="" type="checkbox"/> History	<input type="checkbox"/> Edit <input type="checkbox"/> Add folder <input type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/> Add a document <input type="checkbox"/> Thread <input type="checkbox"/> Manage versions	<input type="checkbox"/> Administration <input type="checkbox"/> Manage permissions <input type="checkbox"/> Digital signature <input type="checkbox"/> Export metadata

☐ Manager of extranet folders

By default every extranet folders are accessible through the extranet's parent folder manager. You can specify a different user here.

Save

#### 1.7.3.6 Follow-up of consultations and reminders

Once the documents have been published in an Extranet, it is possible to follow which documents have been consulted or not by the users of the extranet from the **"Follow-up"** tab.

Filters by **"View"** ( viewed or never seen ) and by **"User"** are available.

It is possible to send a reminder by email to a user who has not consulted one or more documents.





Users to be created   Folders   **Suivi**   Automatic reminder   Permissions   Configuration

Actions on the selection ▾ Display  Items per page

@ Send reminder

	Name ▲ ▼	Filing category	Send date ▲ ▼	View ▲ ▼	User
<input type="checkbox"/>	HSBC (2)	Default	2017-07-19 14:39	-	newtestopenbee
<input checked="" type="checkbox"/>	Newnewtest	Default	2017-07-20 10:09	-	newtestopenbee
<input checked="" type="checkbox"/>	HSBC test	Default	2017-07-20 10:10	-	newtestopenbee

Reminders can be automated from the "**Automatic reminder**" tab.

Users to be created   Folders   Suivi   **Automatic reminder**   Permissions   Configuration

**Automatic reminder**

Number of reminders

Interval

Criteria for automatically reminder of unread documents [+ Add a criteria](#)

The number of reminders indicates the number of times that a dunning email will be sent to the user as long as the user has not consulted certain documents available on his extranet.

The frequency is used to define the interval at which reminders are sent.

The reminder's criteria make it possible to limit the reminder to certain typologies of documents.

#### 1.7.4 Rename an Extranet

Click on the extranet in the list. It is then possible to rename it. During this operation the extranet root folder will also be renamed.



### 1.7.5 Remove an extranet

It is possible to remove an extranet.

This operation :

- Retains all documents and /foldersrecords of the extranet
- Disables the extranet users

Once an extranet is removed, it is possible to restore access to the extranet to a user by reactivating it from the " **Administration \ Users** " section.

## 1.8 Filing categories

Filing categories are a fundamental notion of the Open Bee™ Portal solution.

This feature allows to manage the filing and renaming, in a uniform and centralized way, of all the documents which will be classified, regardless of the user and the connected application.

By defining filing categories based on document types, you make sure that your tree classifying structure is homogeneous.

In order to manage filing categories, click on "**Administration**" \ "**Filing categories**"

Administration

System	Users	Documents	Workflow
<b>DMS Settings</b> Set general parameters of your Document Management Solution	<b>Users</b> Add, edit or delete users	<b>Filing categories</b> View and edit document types	<b>Workflow Designer</b> View and edit document approval workflows
<b>Customization</b> Customize background picture...	<b>Groups</b> Manage group	<b>Secured Conservation Spaces</b> Add or view Secured Conservation Spaces	<b>List of tasks</b> Manage pending tasks or process in Workflow (Validation, rejection, participant change...)
<b>Email customisation</b> Change sent emails content	<b>Roles</b> Manage user roles	<b>Folder types</b> Add, edit, delete the folders types	<b>Working hours</b> Manage working hours and bank holidays
<b>License</b> View and edit license details	<b>LDAP Servers</b> Add, edit and delete LDAP servers used to import users and groups	<b>Links</b> View and edit dynamic links between document types	
<b>@ Emails</b> Preview and send again all emails generated by the system	<b>Alias</b> View and edit users alias	<b>Stamps</b> View and edit workflow stamps	
<b>Transactions</b> View transactions and check their integrity	<b>Users notifications</b> View and edit users notifications	<b>Open Bee™ Scan O.C.S</b> View and edit Open Bee™ Scan O.C.S settings	
	<b>Extranet</b> Manage communication spaces with external users	<b>Share</b> View and modify shared documents	
		<b>Recycle bin</b> View and manage deleted documents and folders	
		<b>Digital signature</b> Manage a company signing certificate and the rules of associated application	

Open Bee™ Portal comes with preconfigured filing categories.



**i** Using metadata that have been entered when filing a document, Open Bee™ Portal will :

- Automatically rename the document
- Dynamically classify the document in a tree of folders and sub folders automatically created
- Store the metadata in a database in order to later find the document.

### 1.8.1 Create a filing category

There are default filing categories. You can adjust them depending on your needs (editing the indexing metadata and the corresponding filing categories). See the "**Editing a filing category**" section.

Click on "**Administration**" \ "**Filing categories**"



## Administration

System ▾ Users ▾ Documents ▾ Workflow ▾

### Filing categories

Add a document filing category

Actions on the selection ▾

<input type="checkbox"/>	Actions	Filing category ^ ▾
<input type="checkbox"/>	<input type="checkbox"/>	Construction
<input type="checkbox"/>	<input type="checkbox"/>	Default
<input type="checkbox"/>	<input type="checkbox"/>	Education
<input type="checkbox"/>	<input type="checkbox"/>	Employment
<input type="checkbox"/>	<input type="checkbox"/>	Finance
<input type="checkbox"/>	<input type="checkbox"/>	Government
<input type="checkbox"/>	<input type="checkbox"/>	Healthcare
<input type="checkbox"/>	<input type="checkbox"/>	Home office
<input type="checkbox"/>	<input type="checkbox"/>	Insurance
<input type="checkbox"/>	<input type="checkbox"/>	Legal
<input type="checkbox"/>	<input type="checkbox"/>	Logistic
<input type="checkbox"/>	<input type="checkbox"/>	Non profit organization
<input type="checkbox"/>	<input type="checkbox"/>	Real estate
<input type="checkbox"/>	<input type="checkbox"/>	Retail
<input type="checkbox"/>	<input type="checkbox"/>	Supplier invoices

Change filing categories language

It is possible to change the filing category language and its associated metadata by using the **"Change filing categories language"** function. This function is located at the bottom left of the filing category administration screen shown above.

Click on **"Add a document filing category"**, type a name.



### Add a document filing category

Name

Submit

[Create metadata](#)

## 1.8.2 Dynamic directory

Click on "**Administration**" \ "**Filing categories**".

Select the filing category to be modified.

### Edit filing category

Name

Education

Read permission

Administrators Users

Edit permission

Administrators

☒ Please tick the box to start the scanning workflow

☐ Apply the filing category again when metadatas are modified

Set up library folder from this parent directory

/

Browse ...

Organize library folder by subdirectories as

Education/<Document issuer>/<Filing category>

Rename documents as

<Filing category>\_<Document issuer>\_<Document date>

Submit



### 1.8.2.1 Permission

Select the groups or users authorized to use this filing category.

### 1.8.2.2 Dynamic filing directory and automatic renaming

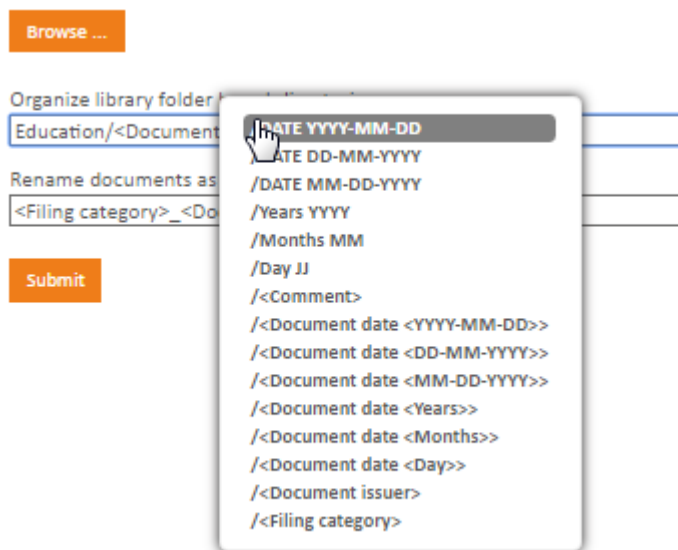
Check "Please tick the box to start the scanning workflow".

Click "**Browse**" to select the filing root folder.

Select the filing folder and click "**Submit**".

By clicking in the renaming and archiving text zones, available metadata will appear.

Then build the dynamic classification tree and the documents renaming by using these metadata.



Select the document renaming filing rule



**Browse ...**

Organize library folder by subdirectories as

Rename documents as

**Submit**

DATE YYYY-MM-DD

DATE DD-MM-YYYY

DATE MM-DD-YYYY

Years YYYY

Months MM

Day JJ

<Comment>

<Document date <YYYY-MM-DD>>

<Document date <DD-MM-YYYY>>

<Document date <MM-DD-YYYY>>

<Document date <Years>>

<Document date <Months>>

## Dates

Two types of dates are available :

- the "system" date, characterized by the keyword "**DATE<...>**"
- a date type metadata characterized by the metadata name which is surrounded by chevrons. Example : "**<date de reception<...>>**"

In both cases, the part between chevrons "**<...>**" allows to define the date format which will be used in the dynamic directory creation.

All formats supported by PHP are accepted : <http://php.net/manual/fr/function.date.php>

Example : a file classified on **15/05/2015** and containing a metadata "**reception date**" whose value is on **04/04/2015**.

systemDate<Y>	2015
<reception date<Y_m_d>>	2015_04_04
<reception date<Y_n_j>>	2015_4_4
reception date<Ym>>	201504
systemDate<d-m-Y>	15-05-2015





## 1.8.3 Edit or delete a filing category

Click on "Administration" \ "Filing categories".

### 1.8.3.1 Edition

- Select the filing category (the title can be changed)
- Modify its metadata (1)
- Select again the filing rule
- Modify the dynamic classification tree and access authorizations of the filing category (2).

#### 1) Metadata edition

Filing categories

Add a document filing category

Actions on the selection

Actions	Filing category
<input type="checkbox"/>	Construction
<input type="checkbox"/>	Customer records
<input type="checkbox"/>	Default
<input type="checkbox"/>	Education
<input type="checkbox"/>	Employment
<input type="checkbox"/>	Finance
<input type="checkbox"/>	Government
<input type="checkbox"/>	Healthcare
<input type="checkbox"/>	Home office
<input type="checkbox"/>	Insurance
<input type="checkbox"/>	Legal
<input type="checkbox"/>	Logistic
<input type="checkbox"/>	Non profit organization
<input type="checkbox"/>	Real estate
<input type="checkbox"/>	Retail
<input type="checkbox"/>	Supplier invoices

Add a metadata

Actions on the selection

Actions	Metadata
<input type="checkbox"/>	Comment
<input type="checkbox"/>	Document date
<input type="checkbox"/>	Document issuer
<input type="checkbox"/>	Document type

Edit metadata

Name

Document type

☒ Mandatory

Type

List

Construction

List name

Construction

Values

Bidding paper  
Bill of quantities  
Building certificate  
Building plan

Submit

#### 2) Filing category edition

Administration

System - Users - Documents - Workflow

Filing categories

Add a document filing category

Actions on the selection

Actions	Filing category
<input type="checkbox"/>	Construction
<input type="checkbox"/>	Default
<input type="checkbox"/>	Education
<input type="checkbox"/>	Employment
<input type="checkbox"/>	Finance
<input type="checkbox"/>	Government
<input type="checkbox"/>	Healthcare
<input type="checkbox"/>	Home office
<input type="checkbox"/>	Insurance
<input type="checkbox"/>	Legal
<input type="checkbox"/>	Logistic
<input type="checkbox"/>	Non profit organization
<input type="checkbox"/>	Real estate
<input type="checkbox"/>	Retail
<input type="checkbox"/>	Supplier invoices

Add a metadata

Actions on the selection

Actions	Metadata
<input type="checkbox"/>	Comment
<input type="checkbox"/>	Document date
<input type="checkbox"/>	Document issuer
<input type="checkbox"/>	Filing category

Edit filing category

Name

Education

Read permission

Administrators Users

Edit permission

Administrators

☒ Please tick the box to start the scanning workflow

☐ Apply the filing category again when metadatas are modified

Set up library folder from this parent directory

/

Browse

Organize library folder by subdirectories as

Education/<Document issuer>/<Filing category>

Rename documents as

<Filing category>\_<Document issuer>\_<Document date>

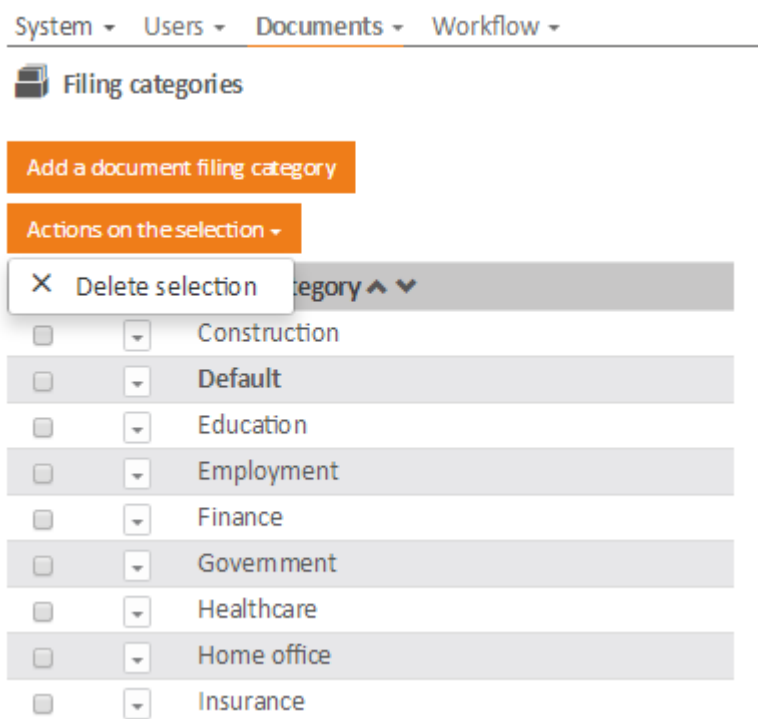
Submit



### 1.8.3.2 Deletion

To delete one or several filing categories :

- Check the filing category to be modified
- Click on the "**Delete selection**" menu



A confirmation message for deletion appears.

Click "**Submit**"



All the subsequent metadata will be automatically deleted in cascade.



## 1.8.4 Lists

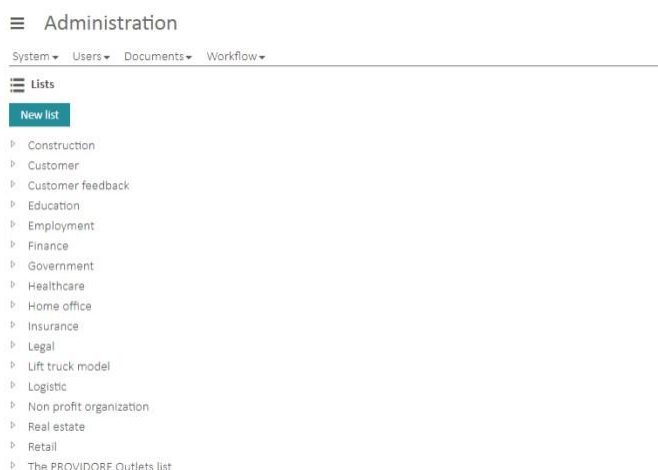
Lists linked to Open Bee™ Portal metadata can be managed directly from the filing categories administration.

Another way to manage those lists is available in "**Administration**" \ "**Lists**".

This section enables to define sublists that can then be used in metadata filing.

### 1.8.4.1 Simple lists

The left part of the screen displays all available lists.



To view a list or edit it, click on its name.

To add a new list, click on the "New list" button. Enter the name of the list and its values (one per line)

New list

List name Countries

Values France  
Germany  
Thailand

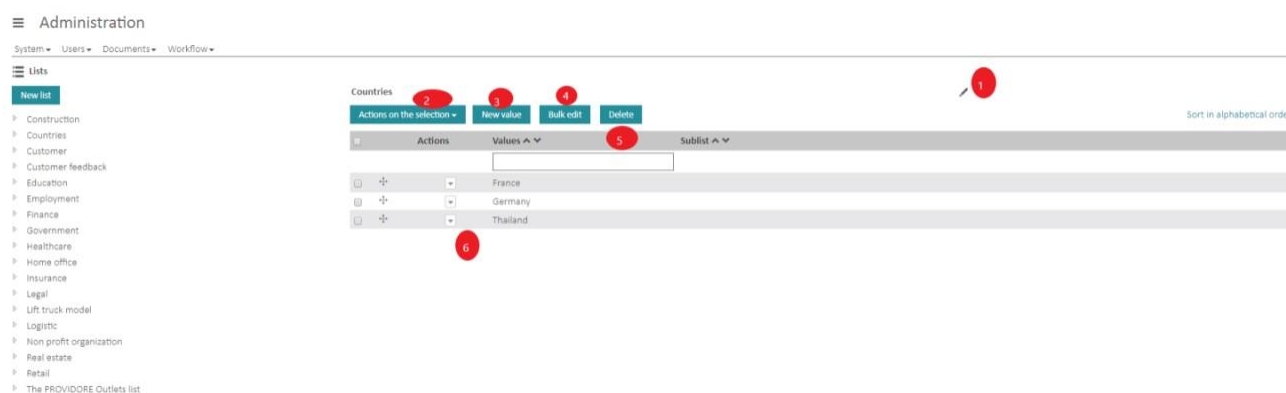
Validate



Once created, the list is displayed at the section center.

Different actions are available in the selected list :

1. The pen to rename the list
2. The selectbox and "Actions on the selection" button enable to delete several elements from the list
3. The "Add value" button enables to enter a new value to add to the list
4. The "Bulk Edition" button enables to edit all the list value in the same text field (one value per line)
5. The "Delete" button enables to delete the list and its values
6. The context menu linked to the list values enables to : edit this value, delete it and link it to a sublist



It is possible to import lists from external database [Consulter le guide pratique sur ce sujet pour plus de détails.](#)

#### 1.8.4.2 Sublists

Before creating and editing sublists, it is important to know that :

- A list is defined by a name and composed of different values (ex : a list named country contains the values France and Germany)
- A sublist is a list linked to one and only value from another list (ex : the list named Ile-de-France is linked to the value Region de France in the Region list)

To create a sublist, use the context menu on a list value and select the sublist entry. A window enables you to define a new list and to select an existing list that will be linked to the value of the parent list.



### Sublist

List

New list ▼

List name

Cities

Values

Annecy

Nice

Lyon

Marseille

Validate

Once validated, the sublist can be viewed :

1. In the list tree, as a sublist of the parent list
2. In the lists tree as a simple list (a sublist remains a list)
3. In the list details, linked to its parent value

Administration

System ▾ Users ▾ Documents ▾ Workflow ▾

Lists

New list

Construction

Countries

Cities

Customer

Customer feedback

Education

Employment

Finance

Government

Healthcare

Home office

Insurance

Legal

Lift truck model

Logistic

Non profit organization

Real estate

Retail

The PROVIDORE Outlets list

Countries

Actions on the selection ▾ New value Bulk edit Delete

Sort in alphabetical order

Actions	Values ▾	Sublist ▾
<div>+</div>	France	Cities <div>3</div>
<div>+</div>	Germany	
<div>+</div>	Thailand	

A sublist can only be linked to one parent list.

Once the sublists are defined, you need to define the metadata that will use them.

In the "**Administration / Filing categories**" section :

- Create a list type metadata with the parent list (Country for instance)



- Create a sublist type metadata and select as parent metadata "Country"

**Add a metadata**

**Name**

☒ **Mandatory**

**Type**

☐ **Multiple**

☐ **Allow to add value in the list when filing a document**

**Parent metadata**

**Submit**

This link between the parent metadata will enable the system to propose the sublist "France regions" for the "Region" metadata when the user selects "France" in the "Country" metadata.



**Fill in**

**Filing categories**  

Customer records

**customer name \***  

abc Grenat pour toi

**reference**  

abc BC00006

**date**  

2019-01-10

**document title \***  

abc Purchase order

**countries \***  

France

**cities \***  

Anancy

/ext  
 Paris  
Gre Strasbourg  
Fil **Anancy**  
Nice  
Lyon  
Marseille



## 1.8.5 Create metadata

In order to create metadata:

- Click on the "**Administration**" \ "**Filing categories**" tab
- Select the filing category
- Click on "**Add a metadata**"

### Add a metadata

Name

☐ **Mandatory**

Type

☐ **Multiple**

List



List name

Values

☐ **ADD\_LIST\_VALUE\_IN\_DOCUMENT\_CREATION**

Submit

Enter a name for the metadata to be created

Check the "**Mandatory**" box to make this index as mandatory, in order to force users fill this field in. If left unchecked, the index can then be left blank when filing documents.

Choose the type of metadata from the following drop-down list:





### Type

If "**List**" is selected as metadata type, choose :

- Either an existing list from the menu
- Or create a new list and add values to it



It is possible to import lists from external databases. [Consult the practical guide on this subject for more details.](#)

The checkbox "**Multiple**" allows you to enter several values in the same metadata.

For example, a "**Delivery form**" metadata will be able to store multiple delivery note numbers if the "**Multiple**" checkbox is checked.

Repeat this operation as often as needed.

You can then modify your filing category to define the associated dynamic tree structure.



## 1.9 Digital Safe Box

The Open Bee™ Portal permissions' system on folders is configured to allow members of the **"Administrators"** group to visualize all files and documents.

This behavior is sometimes problematic, for example when archiving sensitive documents (for example : pay slips) that the administrator should not be able to see.

The Digital Safe Box concept was built to address this problem. A **"Digital Safe Box"** is a folder that is not accessible by the **"Administrators"** group. Besides, a **"Digital Safe Box"** is a main component for the use of Open Bee™ Portal such as defined in the NF LOGICIEL - CCFN norm ( [dans le cadre de la norme NFLOGICIEL - CCFN.](#) )

### 1.9.1 Create a Digital Safe Box

Prerequisites :

- A user account with the role of **"Functional Administrator"**
- A user who will become the manager of the **" Digital Safe Box "**
- Your Open Bee Portal license includes the **" Digital Safe Box "** option .

A **" Digital Safe Box "** requires that only its manager (and potential guest(s)) can access its content. This behavior is provided by the *Open Bee™ Portal Digital Safe Box concept*.

Sign in with a **" Functional Administrator "** account .

1. From the **"Administration \ Digital Safe Box"** section, click on **"Add a Digital Safe Box"**
2. Select the **"Digital Safe Box"** manager (the **"Digital Safe Box"** owner)
3. Select the folder that will be transformed into a **" Digital Safe Box "** . It is possible to create this folder at this stage if it does not exist yet .  
In the screen below, we chose the folder **"RH"** at the root of the tree.
4. Define the permissions that the manager will have on the **" Digital Safe Box "** .



**Create a Digital Safe Box**

Select a folder Browse... RH Only one item can be selected

Digital Safe Box manager Sandra Dujardin

Folder's manager permissions

<input checked="" type="checkbox"/> All >	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Administration
	<input checked="" type="checkbox"/> Read	<input checked="" type="checkbox"/> Add folder	<input checked="" type="checkbox"/> Manage permissions
	<input type="checkbox"/> Apply watermark	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Give back
	<input checked="" type="checkbox"/> Print	<input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> Digital signature
	<input checked="" type="checkbox"/> Download	<input checked="" type="checkbox"/> Add a document	<input checked="" type="checkbox"/> Export metadata
	<input checked="" type="checkbox"/> Preview	<input checked="" type="checkbox"/> Thread	
	<input checked="" type="checkbox"/> History	<input checked="" type="checkbox"/> Manage versions	

**Validate**

Once this operation is done, the manager of the " Digital Safe Box " becomes the only user who can access the folder.

Once created, a "**Digital Safe Box**" can neither be modified, nor be deleted by a "**Functional administrator**". This limitation, which may appear as a functional lack, is in fact the absolute guarantee that the solution administrators cannot consult the "**Digital Safe Box**" content.

The manager's permissions can therefore only be modified by the manager himself, provided he has the necessary permissions to do so.

If you do not grant the user the necessary permissions when creating the " **Digital Safe Box** ", make sure that this configuration will not cause problems because it is **irreversible** .

Creating the " **Digital Safe Box** " also has the effect of automatically activating:

- Encryption of documents stored in the " **Digital Safe Box** " , even if this option is not enabled in the general configuration of Open Bee™ Portal
- A second factor of authentication by email during the authentication of the manager of the " **Digital Safe Box** " .
- Prevent administrators from changing/modifying the user manager password.



### 1.9.2 Check the "Digital Safe Box" Integrity

Although he can not consult the documents, a functional administrator has the possibility to check the integrity of the stored documents of/in a " **Digital Safe Box** " .

This function is accessible via the contextual menu associated with each " **Digital Safe Box** " in the section " **Administration \ Digital Safe Box** " .

The operation carried out is identical to that performed by a manager of a " **Digital Safe Box** " , especially for the result that will appear in notifications.

Administration

System ▾ Users ▾ Documents ▾

Digital Safe Box

Add a Digital Safe Box

Actions	Digital Safe Box manager	Name ^ ▾	Path
	Sandra Dujardin	RH	/RH/

- Check integrity
- Consult the logs



### 1.9.3 Consult the transactions/logs of a "Digital Safe Box"

A functional administrator is able to consult the transactions/logs of the operations performed in a Digital Safe Box .

This function is accessible from the contextual menu associated with each Digital Safe Box in the section **"Administration \ Digital Safe Box"**.

#### Administration

System ▾ Users ▾ Documents ▾

##### Digital Safe Box

Add a Digital Safe Box

Actions	Digital Safe Box manager	Name ^ ▾	Path
<div><div>▾</div><div><div>✓ Check integrity</div><div>☰ Consult the logs</div></div></div>	Sandra Dujardin	RH	/RH/

The same result can be obtained by navigating to the section **"Administration \ Transactions"** and selecting a **"Digital Safe Box"** using the filter at the top of the table .

#### Administration

System ▾ Users ▾ Documents ▾

##### Transactions

Transactions Time stamp Time stamp parameters

Transactions list 1 items

Actions on the selection ▾

Check integrity for all transactions

RH - Sandra Dujardin ▾

Actions	Element ^ ▾	Actions ^ ▾	User ^ ▾	Date ^	Description ^ ▾	Comment ^
<div><div>▾</div></div>	<div><div>▾</div></div>	<div><div>▾</div></div>	<div><div>▾</div></div>	<div><div></div> to <div></div></div>		
<div><div>▾</div></div>	1322	digital safe box added	Ameni Chabaane	2017-09-26T16:35:18+0200	/RH/	



## 1.10 Dynamic Links

This administration section allows to configure the manner in which Open Bee™ Portal suggests documents to be linked with one another.

In order to manage dynamic links, click on "**Administration**" \ "**Links**".

The selection algorithm is based on relations between documents' metadata . The configuration consists in linking the metadata of two filing categories between them.

**Example:** Let's figure that you want to link your invoices to the corresponding orders.

There are two filing rules called "**Invoices**" and "**Orders**" with the following metadata :

Invoice	Purchase Order
amount	amount
supplier	supplier
date	date

We will configure relations between the metadata :


1. *amount* of invoice and *amount* of purchase order
2. *supplier* of invoice and *supplier* of purchase order

Click the "**Add a link**" button to add a relation between the two filing categories/rules .



## Administration

System ▾ Users ▾ Documents ▾ Workflow ▾

 Set a dynamic file linking between two document types

Warning! The document linking feature may not proceed correctly if the two selected metadata are not of the same nature.

☒ Automatically link documents that satisfy these criteria

Operator	Filing category 1	Filing category 2
AND ▾	Invoice ▾	Purchase Order ▾
	Amount ▾	Amount ▾ 
	Supplier ▾	Supplier ▾ 

Validate

The "Automatically link documents that satisfy these criteria" checkbox allows to automatically link documents without manual operation. If it is not checked, the link will only be suggested and a user will have to validate it manually.

The "AND / OR" operator allows to determine the behavior if multiple metadata are used. In this example, it will be necessary for the metadata "Amount" AND the metadata "Supplier" to be identical for the documents to be linked.

The "OR" is typically used when the link is not automatic to provide as many suggestions as possible to the user. The "AND" is to be preferred in case of automatic links.

Once this configuration has been setup, if a user wants to file/archive a 1000 € invoice from Open Bee™ and if a purchase order of 1000 € from the company Open Bee™ is available, documents will be automatically linked .

In the Link screen, by default, five suggestions per page are displayed. This parameter can be modified from the "/ administration / config" screen.  
Change the "docBySearchPage" parameter and save.



## 1.11 Links

This administration section allows to configure the manner in which Open Bee™ Portal suggests documents to be linked with one another.

In order to manage the links, click on "**Administration**" \ "**Links**".

Administration

The screenshot shows the Administration menu with four main categories: System, Users, Documents, and Workflow. The 'Documents' category is highlighted with a red box, and the 'Links' option is selected within it. The 'Links' option is described as 'View and edit dynamic links between document types'.

System	Users	Documents	Workflow
<b>DMS Settings</b> Set general parameters of your Document Management Solution	<b>Users</b> Add, edit or delete users	<b>Filing categories</b> View and edit document types	<b>Workflow Designer</b> View and edit document approval workflows
<b>Customization</b> Customize background picture...	<b>Groups</b> Manage group	<b>Secured Conservation Spaces</b> Add or view Secured Conservation Spaces	<b>List of tasks</b> Manage pending tasks or process in Workflow (Validation, rejection, participant change...)
<b>Email customisation</b> Change sent emails content	<b>Roles</b> Manage user roles	<b>Folder types</b> Add, edit, delete the folders types	<b>Working hours</b> Manage working hours and bank holidays
<b>License</b> View and edit license details	<b>LDAP Servers</b> Add, edit and delete LDAP servers used to import users and groups	<b>Links</b> View and edit dynamic links between document types	
<b>@ Emails</b> Preview and send again all emails generated by the system	<b>Alias</b> View and edit users alias	<b>Stamps</b> View and edit workflow stamps	
<b>Transactions</b> View transactions and check their integrity	<b>Users notifications</b> View and edit users notifications	<b>Open Bee™ Scan O.C.S</b> View and edit Open Bee™ Scan O.C.S settings	
	<b>Extranet</b> Manage communication spaces with external users	<b>Share</b> View and modify shared documents	
		<b>Recycle bin</b> View and manage deleted documents and folders	
		<b>Digital signature</b> Manage a company signing certificate and the rules of associated application	

The selection algorithm is based on relations between document metadata. The configuration consists in linking the metadata of two filing categories between them.

**Example:** Let's imagine that you want to link your invoices to the corresponding orders.

There are two document types called "**Invoices**" and "**Orders**" with the following metadata :

Invoice	Purchase order
amount	amount
supplier	supplier
date	date






We will configure relations between the metadata :

1. *amount* of invoice and *amount* of purchase order
2. *supplier* of invoice and *supplier* of purchase order

Click the "**Add a link**" button to add a relation between the two filing categories :

## Administration

System ▾ Users ▾ Documents ▾ Workflow ▾

 Set a dynamic file linking between two document types

Warning! The document linking feature may not proceed correctly if the two selected metadata are not of the same nature.

Filing category 1

Education ▾

Comment ▾

Filing category 2

Education ▾

Comment ▾



Validate

Once this configuration has been setup, if a user wants to link a \$100 invoice from Open Bee™ to another document, all the orders from Open Bee™ for \$100 will be available from the "Suggested documents" area.



## 1.12 Share

Open Bee™ Portal allows to share documents towards external contacts by sharing a link towards a document (see the dedicated section in the User Guide).

This administration section allows to view the shared documents and set up sharing.

Click on **"Administration" \ "Share"**

Administration

System	Users	Documents	Workflow
<b>DMS Settings</b> Set general parameters of your Document Management Solution	<b>Users</b> Add, edit or delete users	<b>Filing categories</b> View and edit document types	<b>Workflow Designer</b> View and edit document approval workflows
<b>Customization</b> Customize background picture...	<b>Groups</b> Manage group	<b>Secured Conservation Spaces</b> Add or view Secured Conservation Spaces	<input checked="" type="checkbox"/> <b>List of tasks</b> Manage pending tasks or process in Workflow (Validation, rejection, participant change...)
<b>Email customisation</b> Change sent emails content	<b>Roles</b> Manage user roles	<b>Folder types</b> Add, edit, delete the folders types	<input type="radio"/> <b>Working hours</b> Manage working hours and bank holidays
<b>License</b> View and edit license details	<b>LDAP Servers</b> Add, edit and delete LDAP servers used to import users and groups	<b>Links</b> View and edit dynamic links between document types	
<b>@ Emails</b> Preview and send again all emails generated by the system	<b>Alias</b> View and edit users alias	<b>Stamps</b> View and edit workflow stamps	
<b>Transactions</b> View transactions and check their integrity	<b>Users notifications</b> View and edit users notifications	<b>Open Bee™ Scan O.C.S</b> View and edit Open Bee™ Scan O.C.S settings	
	<b>Extranet</b> Manage communication spaces with external users	<b>Share</b> View and modify shared documents	
		<b>Recycle bin</b> View and manage deleted documents and folders	
		<b>Digital signature</b> Manage a company signing certificate and the rules of associated application	

### 1.12.1 Approval of shares

#### Administration

System ▾ Users ▾ Documents ▾ Workflow ▾

Share

Settings

☒ Wait until the administrator has approved the sharing of the document or folder

Validate

**"Wait until the administrator has approved the sharing of the document or folder"** : allows to submit all shared documents and folders in Open Bee™ Portal to an administrator validation.




When documents or folders sharing are waiting for approval, a notification in the administrators' **"Dashboard"** is displayed. They are also informed by email.


## Dashboard

 0

Documents to be filed

 0


Folder(s) to complete

 0

Shared items pending for approval

 1

Reminders

 1

Notifications

This notification redirects the administrators towards the list of shared documents / folders described below.



### 1.12.2 Shared documents / folders list

The shared documents / folders list allows administrators:

- To approve in batches the shared documents / folders waiting for approval (Actions on the selection)
- To delete shared documents / folders in batch (active or not)
- To modify the sharing details

#### Administration

System ▾ Users ▾ Documents ▾ Workflow ▾

Share

Settings

☐ Wait until the administrator has approved the sharing of the document or folder Validate

List of shared documents

Actions on the selection ▾ Display 25 items per page

Actions	State ▾	Approval date ▾	Expiration date ▾	Type ▾	Name ▾	folder path	User ▾
<input type="checkbox"/>	Expired	2016-04-04 15:07	2016-04-06 15:07	Folder	Carat Ltd	/Bijou Ltd/Sales Dpt/Customers files/	Romain Arpin

## 1.13 Automatic Sharing

The automatic sharing function triggers document sharing automatically based on metadata values.

To set up automatic sharing, click on "**Administration**" \ "**Share**", then on the tab "**Partage automatique**"(automatic sharing).

#### Administration

System ▾ Users ▾ Documents ▾ Workflow ▾

Share Partage automatique

Partage automatique

Actions on the selection ▾ New auto sharing criteria

Actions	Filing category ▾	Password	Attach file to email	Shared item expiration time	Metadata
---------	-------------------	----------	----------------------	-----------------------------	----------

Then add a new triggering criterion for automatic sharing by clicking the "**New Auto Sharing criteria**" button




### New auto sharing criteria

Filing category	Education ▼
Metadata	▼
Email metadata	▼
Shared item expiration time	1 day(s) ▼

☒ Protect access to document with a password

☒ Attach file to email

Save

- **Filing rule and metadata** : select the criterion that will trigger the automatic sharing. In the screen above, all documents classified with the "**Education**" filing rule will be shared automatically.
- **Email metadata** : select the metadata which will contain the emails to which the share will be sent.  
 It is possible to provide multiple emails in this field separated by commas ","

The other parameters are the same as those requested [during manual sharing](#).

Once validated, automatic sharing is available and can be modified at any time in the list of the same screen:

#### ≡ Administration

System ▼ Users ▼ Documents ▼ Workflow ▼

Share Partage automatique

 Partage automatique

Actions on the selection ▼ **New auto sharing criteria**

<input type="checkbox"/>	Actions	Filing category ▲ ▼	Password	Attach file to email	Shared item expiration time	Metadata
<input type="checkbox"/>	▼	Education	Yes	Yes	1 day(s)	Type de document



## 1.14 Recycle bin

This section from the administration allows you to permanently erase or restore documents deleted by users.

Administration

System	Users	Documents	Workflow
<ul style="list-style-type: none"><li><b>DMS Settings</b> Set general parameters of your Document Management Solution</li><li><b>Customization</b> Customize background picture...</li><li><b>Email customisation</b> Change sent emails content</li><li><b>License</b> View and edit license details</li><li><b>Emails</b> Preview and send again all emails generated by the system</li><li><b>Transactions</b> View transactions and check their integrity</li></ul>	<ul style="list-style-type: none"><li><b>Users</b> Add, edit or delete users</li><li><b>Groups</b> Manage group</li><li><b>Roles</b> Manage user roles</li><li><b>LDAP Servers</b> Add, edit and delete LDAP servers used to import users and groups</li><li><b>Alias</b> View and edit users alias</li><li><b>Users notifications</b> View and edit users notifications</li><li><b>Extranet</b> Manage communication spaces with external users</li></ul>	<ul style="list-style-type: none"><li><b>Filing categories</b> View and edit document types</li><li><b>Secured Conservation Spaces</b> Add or view Secured Conservation Spaces</li><li><b>Folder types</b> Add, edit, delete the folders types</li><li><b>Links</b> View and edit dynamic links between document types</li><li><b>Stamps</b> View and edit workflow stamps</li><li><b>Open Bee™ Scan O.C.S</b> View and edit Open Bee™ Scan O.C.S settings</li><li><b>Share</b> View and modify shared documents</li><li><b>Recycle bin</b> View and manage deleted documents and folders</li><li><b>Digital signature</b> Manage a company signing certificate and the rules of associated application</li></ul>	<ul style="list-style-type: none"><li><b>Workflow Designer</b> View and edit document approval workflows</li><li><b>List of tasks</b> Manage pending tasks or process in Workflow (Validation, rejection, participant change...)</li><li><b>Working hours</b> Manage working hours and bank holidays</li></ul>

One or several folders and/or documents can be deleted from Open Bee™ Portal, voluntarily or involuntarily, by users having permissions to do so.

Once it has been deleted, a document is not accessible to any user.

**"Actions on the selection"**: allows the administrator to erase (delete) the selected document(s), or to restore them to their original location (it is possible to select several documents).

**"Erase all documents"**: allows to erase without selecting from the documents list.

**"Restore all"**: allows to restore without selecting in the documents list.

It is possible to visualize when and who deleted the documents in the first place.

Administration

System > Users > Documents > Workflow >

Recycle bin

Actions on the selection > Erase all documents > Restore all

Display 25 Items per page

Actions	Name	File path	Deleted by	Suppression date
	Accounting dpt	/My documents/Accounting dpt/	Romain Arpin	March 28, 2016 12:16 PM




## 3 USER GUIDE

### 3.1 Login to the software

#### 3.1.1 Login as administrator

To launch Open Bee™ Portal, follow one of the procedures here under :

- In the menu « Start \ All programs \ Open Bee™ \ Open Bee™ Portal »  
OR
- Launch the Internet browser and enter the following URL: <http://xxx.xxx.xxx.xxx:yyyy> where xxx.xxx.xxx.xxx corresponds to the IP address or to the server name and yyyy to the port on which Open Bee™ Portal has been installed.

 Open Bee™ Portal is installed by default on the port **8000** under Windows and **80** under Linux

The Open Bee™ Portal login page appears.



Username

Password

[Forgotten your password ?](#)

Login

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## Choose the language

Several languages are available as soon as logged in. By default the language of your browser is pre-selected. You can also choose another language in the bottom left of the screen.

Besides French and English , the following languages are available:

- German
- Dutch
- Italian
- Portuguese
- Spanish
- Simplified Chinese
- Traditional Chinese
- Japanese
- Korean
- Arabic

**Language change :** The language can be changed on all the application's pages. The drop-down menu is at the bottom left of the page. To change the language, simply select the language. It will be immediately taken into account and will change automatically.

Enter the username and password and click on " **Login** "

The Open Bee™ Portal dashboard opens, all relevant informations are accessible (documents to be filed, folders to be completed, Shared documents / folders pending for approval, reminders, notifications, documents and favorite folders, as well as the latest searches and recent documents).



By default:

- Administrator account : **admin**
- Administrator password : **admin**





### 3.1.2 Log in as user

In order to log in Open Bee™ Portal, launch your Internet browser and enter the address that was communicated to you by your network administrator:

For example: <http://192.168.5.97:8000><http://192.168.5.97:8000/>

The following window opens, asking you to enter your username and password:

Log in with the username and password provided to you by your administrator and click on "**Login**"

You are now logged in Open Bee™ Portal.

The directories that appear are those which you have access to, either as single reader or with advanced permissions.

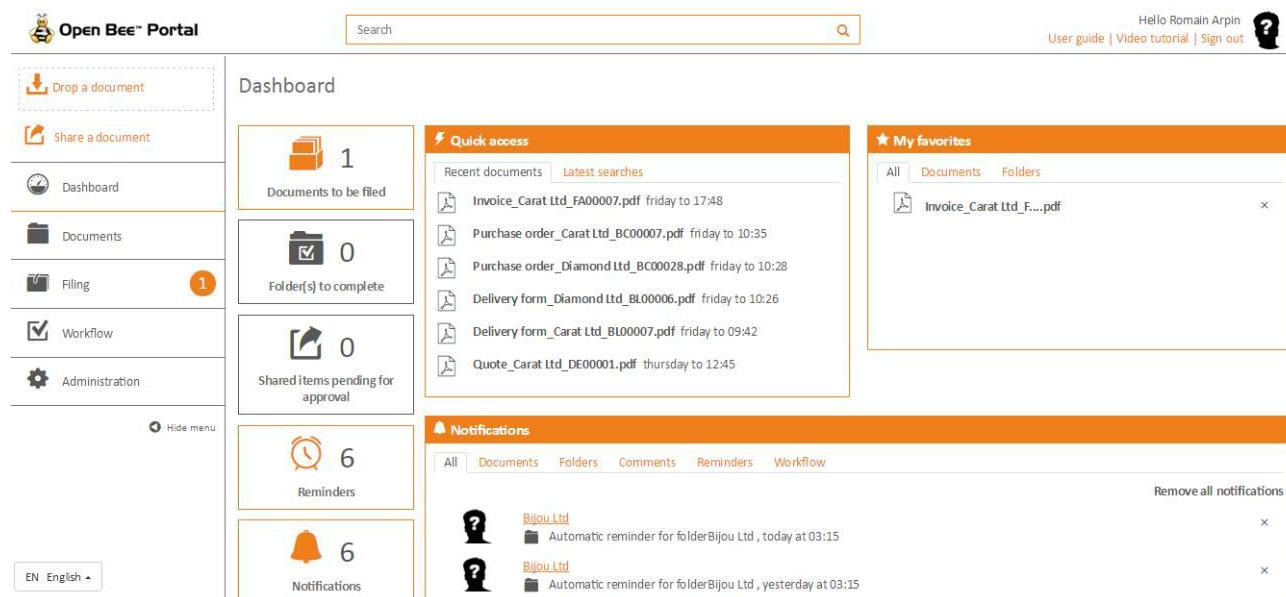
**Note:** Entering the username and password is case-sensitive (upper / lower case). Make sure that the "SHIFT" key is not activated before entering the information.

In case of prolonged inactivity during a session, the "**session expired**" message appears, the username and password must be entered again from the login interface.



## 3.2 Dashboard

Once properly logged in, you arrive on the dashboard or home page :



This interface allows you to access the following features:

- Documents and folders exploration
- Documents search (simple / advanced search)
- Quick access to documents and / or folders from the **"My Favorites"** window.
- Notifications on documents and folders (The user can subscribe to a folder to be automatically notified when the subfolders and documents it contains are modified).
- Notifications on the discussions to which the logged in user contributed

### 3.2.1 Different dashboard sections

#### 3.2.1.1 "My favorites"

You will find in this window all the documents and folders you've added to your favorites.

You can simply access these documents and folders from this window by clicking on it.



### 3.2.1.2 "Quick access"

**"Recent Documents"** : list of documents and folders recently modified (Amendment, addition).

**"Latest searches"** : list of the latest documents searched.

### 3.2.1.3 "Notifications"

**"Documents"** : notifications triggered when actions are performed on the documents in a parent folder to which the connected user subscribed to.

The actions that trigger notifications are:

- Adding a document
- Modifying a document
- Deleting a document
- Adding a new version of a document
- Modifying an existing version
- Deleting a version
- Copying a document
- Moving a Document

**"Folders"** : notifications triggered when actions performed on the documents in a parent folder to which the connected user subscribed to.

The actions that trigger notifications are:

- Adding a folder
- Modifying a folder
- Deleting a folder
- Moving a folder

**"Comments"** : contains notifications triggered when adding a comment to a discussion thread to which the connected user has contributed.

**"Reminders"** : contains all the documents to which you added a reminder.

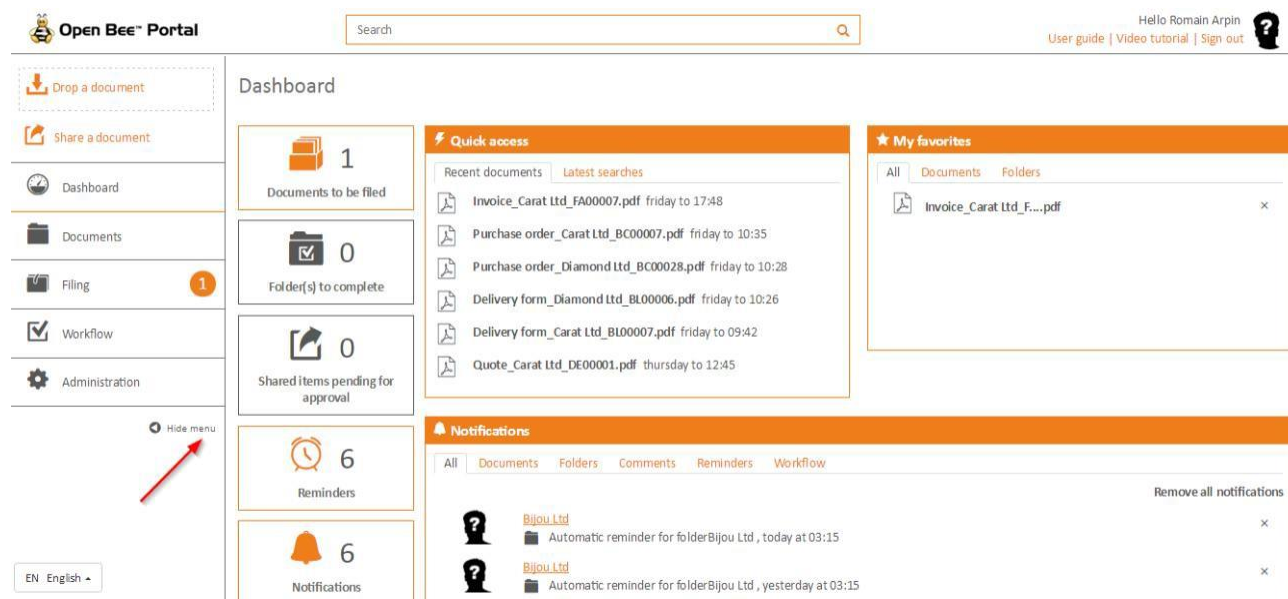
**"Workflow"** : provides access to all the documents present in a workflow which you are associated to.

You will also find in the dashboard:

- the overdue and current tasks
- the number of documents to be filed
- the number of folders to complete
- the number of reminders and the number of notifications



Simply click on one of the tiles to automatically be redirected to the corresponding page.



By clicking on "Hide menu" you can hide the left column to navigate more easily on your dashboard

## 3.3 Documents

### 3.3.1 The filing categories

A *filing category* allows to define metadata associated to documents. A *filing category* is always associated to the same metadata.

**Example:** The **Supplier invoice** filing category has these metadata: **amount, supplier, date**. For each document with the **Supplier invoice** type, values for these three metadata may be associated.

The stored documents in Open Bee™ Portal are all associated to a *filing category*. It is defined when archiving the document.

If the documents were archived in Open Bee™ Portal via Open Bee™ Scan, then the *filing category* will correspond to a Open Bee™ Scan *filing category*.

If the documents were archived in Open Bee™ Portal via Open Bee™ ERP Manager, then the *filing category* will match the *document type* into Open Bee™ ERP Manager.



If the document was archived manually or imported, it is the user who determines the *filing category* when adding the document. If he does not define a specific *filing category*, the "default" category will then be used.

### 3.3.2 Files and documents view mode

#### 3.3.2.1 The « Documents » interface

Open Bee™ Portal uses metadata and flexible documents filing structure, in the form of folders.

The Open Bee™ Portal organization has been designed to allow users to access relevant documents depending on their profile and function, grouping them by group.

By default, the system is free of users and documents.

It is therefore necessary to follow the steps in this manual to add documents, folders and sub-folders.

You can sort the files and documents by their names, by clicking on the arrows in the header of the list.

#### 3.3.2.2 "Breadcrumb" navigation

The "**breadcrumb**" shows the folders / sub-folders tree structure to one or more document(s) from the root folder.

**Example :**

The screenshot displays the Open Bee™ Portal interface. The breadcrumb navigation path is highlighted in red: **/ Bijou Ltd / Sales Dpt / Customers files / Carat Ltd / Purchase orders / (2 items)**. A red arrow points to this path. The interface includes a sidebar with navigation options (Dashboard, Documents, Filing, Workflow, Administration) and a main content area showing a list of documents under the selected path. The document list has columns for Actions, Name, Filing category, Date, and Status.

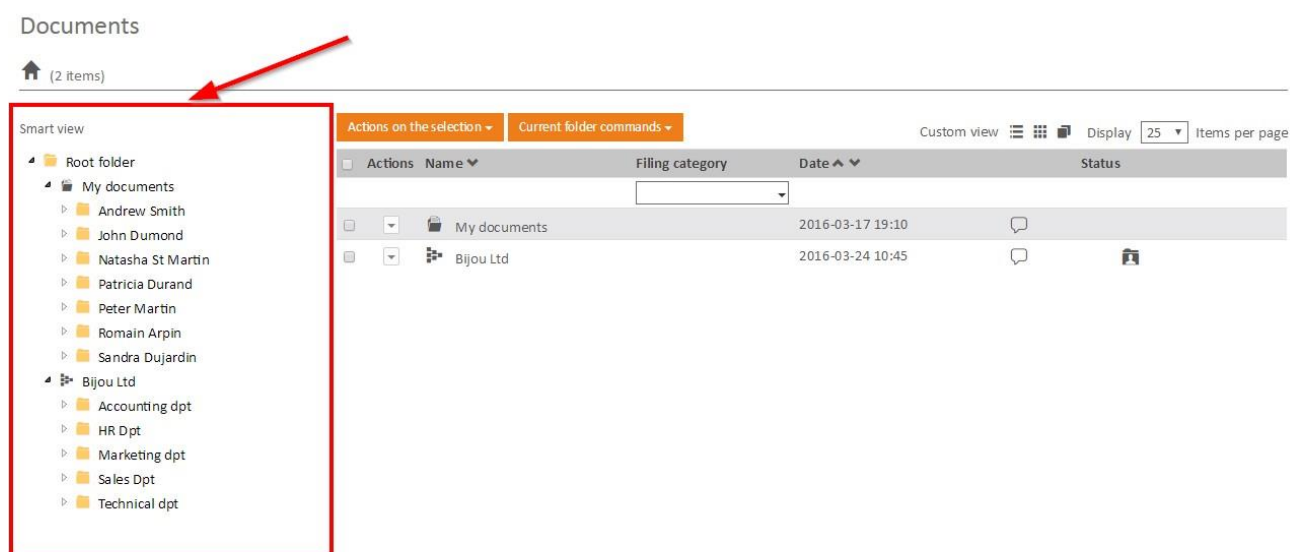
Actions	Name	Filing category	Date	Status
	Purchase order_Carat Ltd_BC00007	Default	2016-03-31 11:30	
	Purchase order_Carat Ltd_BC00032	Default	2016-03-31 11:30	



This navigation mode allows to move easily in the folder tree structure by clicking on the desired destination.

### 3.3.2.3 Smart view

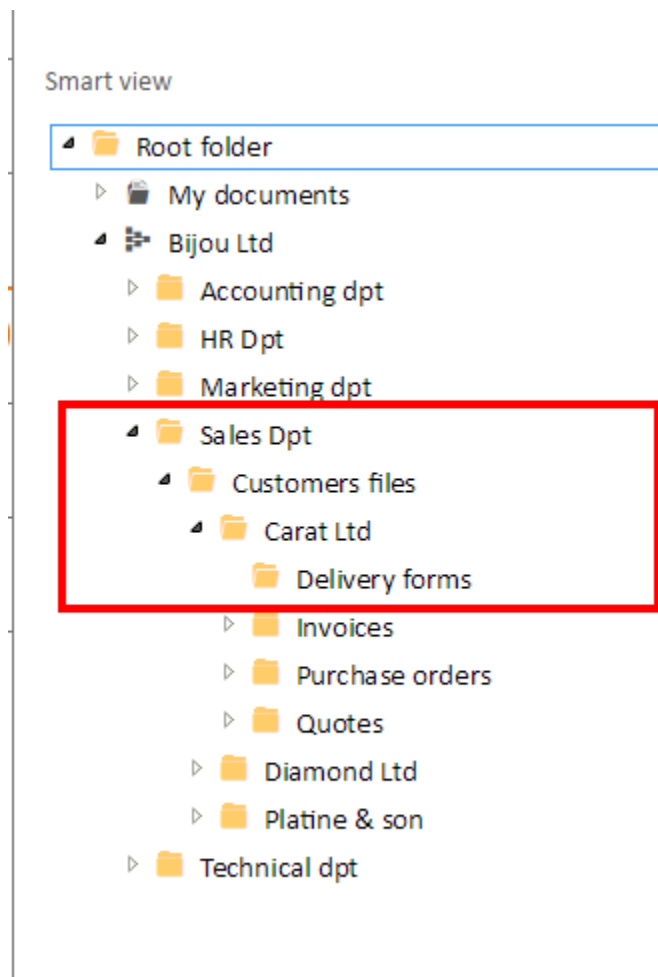
The **smart view** navigation allows to display the folders and sub-folders list under a tree structure format to facilitate access to different levels.



To expand or hide the tree structure, just click on the icons "▶" and "▲".



**Example :**



#### **3.3.2.4 The display by filter**

This feature allows to filter the documents display according to their type.

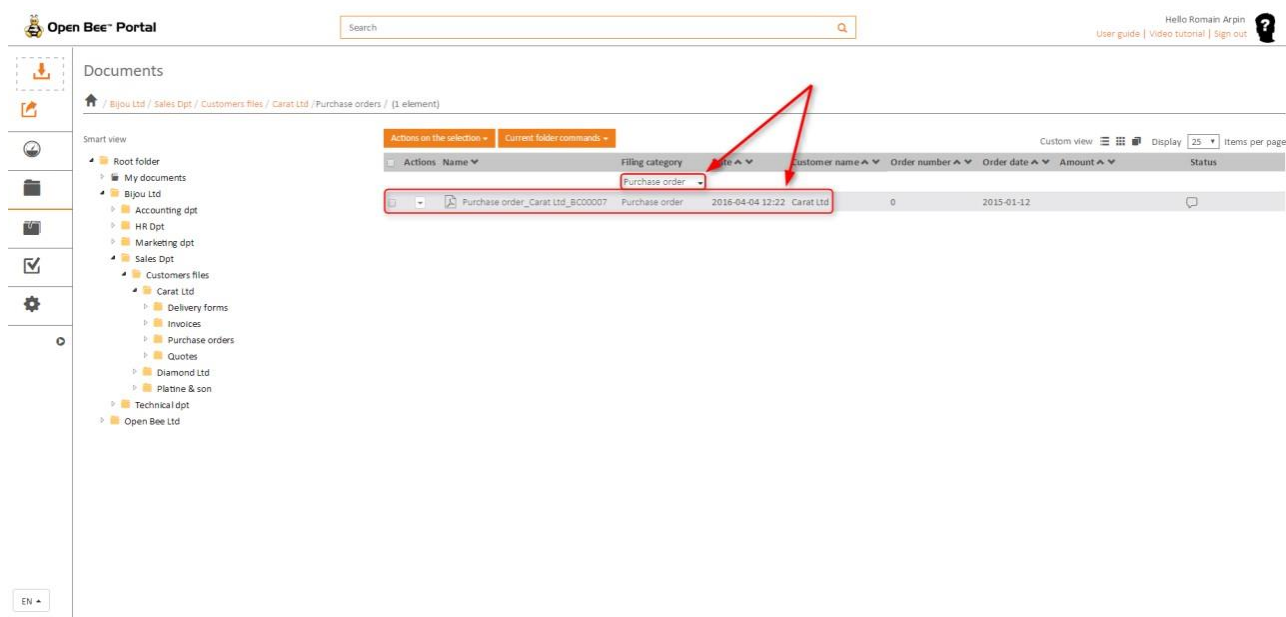
The name of a filter corresponds to the filing category name set from Open Bee™ Scan.

**Example :**

A filing category "Purchase order" has been created from the Open Bee™ Scan application.



If you select the filter "Purchase order" from the drop-down list, only the "Purchase order" document type will be displayed.



In this example, we only see the documents indexed with the "Purchase order" filing category existing in Open Bee™ Scan.

The column headers (in bold) corresponds to the metadata created from Open Bee™ Scan. The metadata values associated to the documents are displayed below.

**Note :** To disable a filter (back to the default display), just select "**No Filter**" from the drop-downlist.





### 3.3.2.5 The 3 display modes in Open Bee™ Portal

Open Bee™ Portal provides the ability to view folders / documents in three different ways:

- Traditional display
- Thumbnail display
- «Documents slide» display

These display modes are described in the sections below:

- **Traditional display**

The traditional display (or list mode), displays all the folders and documents present in the consulted folder, in list form.

#### Documents

Home / Open Bee Ltd / Sales Department / Customer records / Carat Ltd / (4 Items)

Smart view

Actions on the selection - Current folder commands - Custom view [List Icon] [Grid Icon] [Slide Icon] Display [25] Items per page

Actions	Name	Filing category	Date	Status
<input type="checkbox"/>	Delivery forms		2016-04-08 17:32	
<input type="checkbox"/>	Invoices		2016-04-08 17:32	
<input type="checkbox"/>	Purchase orders		2016-04-08 17:32	
<input type="checkbox"/>	Quotes		2016-04-08 17:32	

Smart view

- Root folder
  - My documents
  - Bijou Ltd
    - Open Bee Ltd
      - Sales Department
        - Customer records
          - Carat Ltd
            - Delivery forms
            - Invoices
            - Purchase orders
            - Quotes
          - Deutschland's Bijoux
          - Diamond Ltd
          - Opale
          - Platine & son



- **Thumbnail display**

This view mode displays the folders / documents as thumbnails:

#### Documents

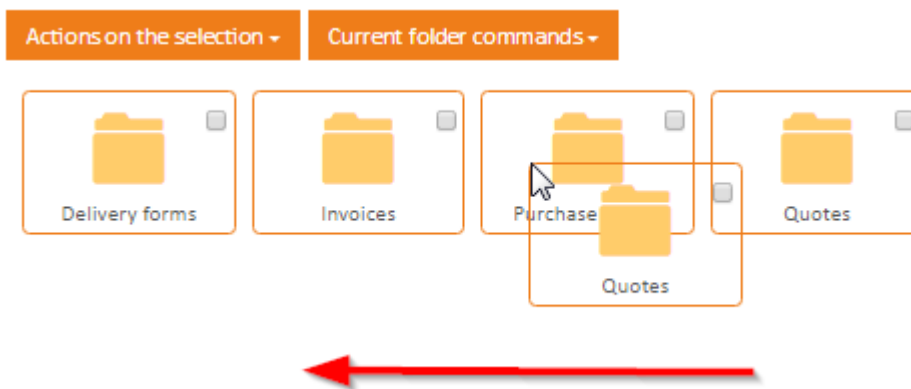


Thumbnails are automatically generated for document types such as [gif](#), [png](#), [jpeg](#), [jpg](#)

Using this mode, the user can:

- Move items (folders or documents) by a simple drag / drop to the folder of his choice.

**Example :**



- Open a folder or download a document by double-clicking it.
- « Document Slide » display






This display mode allows you to view folders and documents as icons or thumbnails.

You can scroll through the images as a slide show with the mouse cursor or the left / right arrows on your keyboard.

## Documents

🏠 / Open Bee Ltd / Sales Department / Customer records / Carat Ltd / (4 items)

Current folder commands ▾

Custom view   



This display mode is particularly useful for scrolling and / or viewing pictures.

### 3.3.2.6 Preview a document

When you click a document from the different views or from a search result, a document preview screen appears.

Document preview : Purchase order\_Carat Ltd\_BC00007

Page: 1 of 1

Automatic Zoom

Bijou SA  
Bijouterie - Joaillerie  
70, rue des Orfèvres  
BP 312  
75009 Paris

Numéro

BC00007

Date

12/01/15

N°télécopie client

02 40 48 67 90

Référence

df152

N°intracommunautaire client

FR373087844356

Carat Ltd  
Yves Debarne  
144, route de Vannes  
BP 14  
44000 NANTES

Purchase order

Date de livraison

mardi 10 février 2015

Adresse de livraison

Carat S.a.r.l  
144, route de Vannes  
BP 14  
44000 NANTES  
France

Cher Client,

Document properties

Parent folder

Actions on the document ▾

Document name

Purchase order\_Carat Ltd\_BC00007

Status

Metadata

No metadata associated to this document

Format - Size

Application PDF - 8.99 KB

Description

Last consultation

?

Romain Arpin 2016-04-01 10:35

Creation

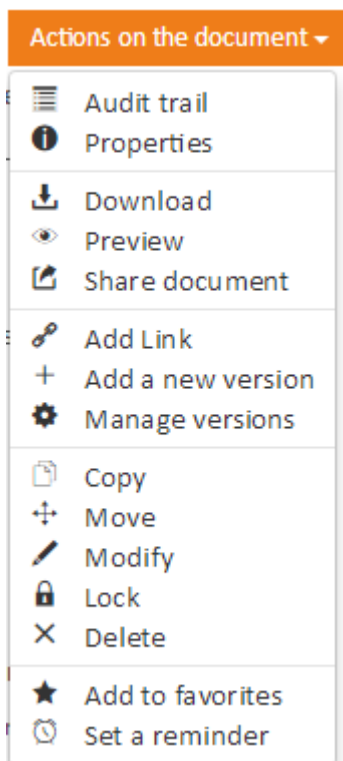
?

Romain Arpin 2016-03-31 11:30

Less info



- The document preview is available for PDF and image documents.
- The **"Parent folder"** button allows you to navigate in the document's parent folder.
- The **"Actions"** button provides access to all possible actions on the document:



- The toolbar displays the status of the document (favorites, status in the workflow, comments ...)
- It is possible to edit the document metadata thanks to the metadata form

#### Métadonnées

Client

Numéro de BC

Date



MS Office documents filed in Open Bee™ Portal are available for consultation directly from the software interface thanks to **Open Bee™ Scan OCS** . You can preview but not edit them.

The user can only edit the metadata if he has the "Change" permission on the parent folder of the document.

The metadata are automatically saved when editing.

### 3.3.3 Documents access permissions

Open Bee™ Portal permission system unables to limit access and features available on documents depending on the user.

Let's take an example :

- Admin : "Administrators" group member
- Sandra : "Marketing" group member
- John : "Sales" group member

#### 3.3.3.1 Permissions when a folder is created

When a folder is created, the folder creator is the only one who can view it

*Sandra creates the Marketing folder, she will be the only one to view it*

But admin group members can access all folders and documents, whereas Patricia can't.

*Admin can view the folder created by Natasha, whereas John can't.*



If you wish to hide some folders to the "Administrators" group members, view the Digital Safe Box section.



### 3.3.3.2 Documents permissions

Permissions apply at the folders level. Documents have the same permission that the folder they're stored in.

*When Sandra adds a document in the Marketing folder, all users who can view the marketing folder can view the document she added.*

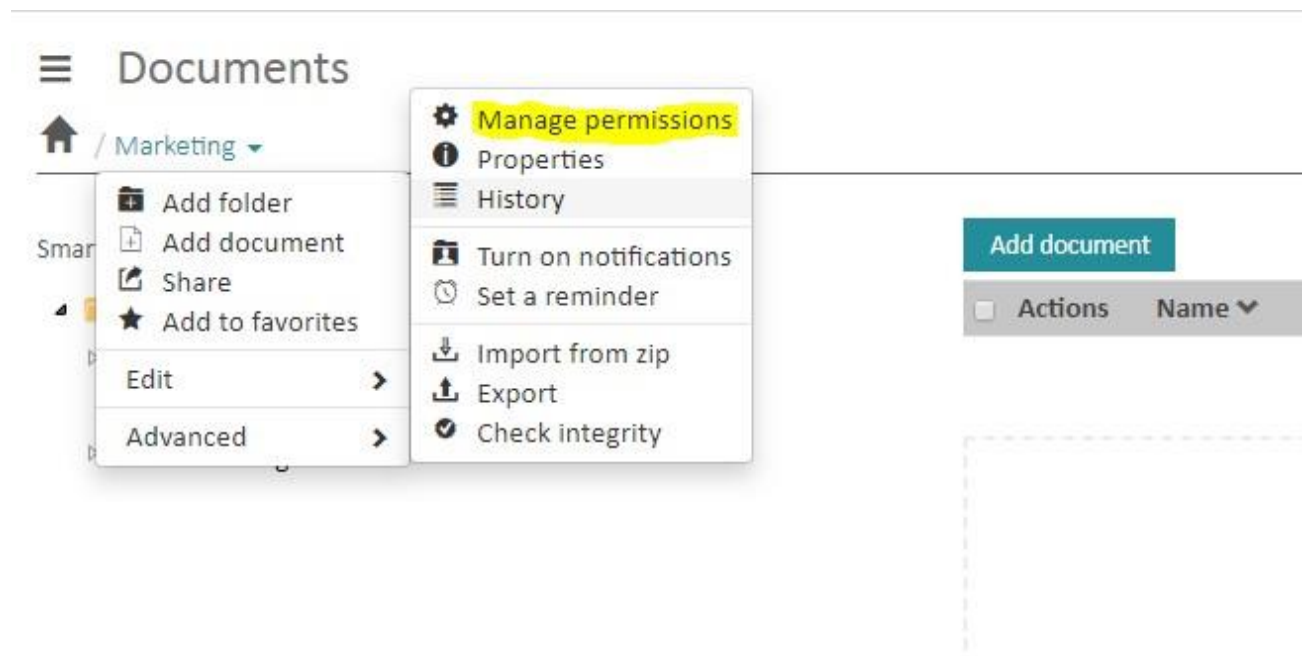
### 3.3.3.3 Change permissions

*Sandra wishes to give access to all the sales persons to the Marketing folder.*

Permissions on a folder can be changed in the menu "Action on the folder" > "Advanced". It is then possible to give access to the folder to more users or groups. To change the permissions to a folder, the connected user must have the "Manage permissions" permission on this folder !

As for the view permission, the folder creator and the Admin group have this permission by default.

*Sandra will add permission to the "sales group" with a "View" only permission. "John" will then view the Marketing folder.*





**Edit permissions for: /Marketing**

This folder is available for the following groups and users

Administrators	<input checked="" type="checkbox"/> All >	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Administration	-
Sandra Dujardin	<input checked="" type="checkbox"/> All >	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Administration	-
Sales	<input checked="" type="checkbox"/> All v	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Edit	<input type="checkbox"/> Administration	-

☒ Read  
☐ Apply a watermark  
☒ Print  
☒ Download  
☒ Display  
☒ History  
☒ Share  
☒ Properties  
☒ Assign a task  
☒ Create a workflow on the fly

☐ Add folder  
☐ Edit  
☐ Delete  
☐ Add a document  
☐ Thread  
☐ Manage versions

☐ Manage permissions  
☐ Digital signature  
☐ Export metadata  
☐ Check integrity

☐ Apply those permissions to all subfolders (existing and created later on)

Inherit permissions from parent folder

**Save permissions**

Even if Open Bee™ Portal enables to manage permissions per user, we strongly recommend to use the groups in the permission definition. The use of group enables an easier maintenance when changes are made on your document management system lifecycle.

#### 3.3.3.4 Permissions inheritance

*Natasha then creates a subfolder "Prices" in the Marketing folder and drops document in it. She thinks Patricia can access it but she won't be able to.*

When a folder is created, the folder creator is the only one who can view it (with the administrators). This behavior is perfect to ensure that a user won't give access to a folder to other users without noticing. But it is then complicated when you wish to give access to an entire folder tree without redefining permissions at each folder creation. The permissions inheritance enables to fix this issue by applying the parent folder permission to all created folders.

*Natasha will then update the Marketing folder permissions by clicking the checkbox "inherit permissions".*



**Edit permissions for: /Marketing**

This folder is available for the following groups and users

Administrators	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Administration
Sandra Dujardin	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Administration
Sales	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Edit	<input type="checkbox"/> Administration

☒ Read  
☐ Apply a watermark  
☒ Print  
☒ Download  
☒ Display  
☒ History  
☒ Share  
☒ Properties  
☒ Assign a task  
☒ Create a workflow on the fly

☐ Add folder  
☐ Edit  
☐ Delete  
☐ Add a document  
☐ Thread  
☐ Manage versions

☐ Manage permissions  
☐ Digital signature  
☐ Export metadata  
☐ Check integrity

☒ Apply those permissions to all subfolders (existing and created later on)

Inherit permissions from parent folder

**Save permissions**

### 3.3.3.5 Permissions details

#### View permissions

- View : access to folders and documents
- Preview : view the document in Open Bee™ Portal
- Print: print documents from Open Bee™ Portal
- Upload : get a document copy
- Watermark : a digital watermark including the connected user name will be displayed on the document
- History : view all the actions operated on documents

#### Editing permissions

- Add folder : create folders and subfolders
- Change : change name and folder properties, also enables to comment the folder and documents
- Delete : delete folders or documents
- Add document
- Manage versions : change or delete different documents versions



In order to be able to move a document a user should have the deletion suppression on the parent folder and the add folder in the target folder.





### Administration permissions

- Manage permissions : change a folder permissions
- Digital signature : enables to sign electronically documents with the company server certificate
- Export metadata

#### 3.3.3.6 Permissions & API

All the calls made from the API require that you identify with a Open Bee™ Portal user account.

Documents and folders returned by the API are only visible for the user used during the API calls.

### 3.3.4 Actions on the document

#### 3.3.4.1 Downloading

This feature allows to save the document on your computer.

Select the document, then click "**Download**" in the menu.

#### Documents

🏠 / Bijou Ltd / Sales Dpt / Customers files / Carat Ltd / Invoices / (1 element)

Smart view

Actions on the selection ▾ Current folder commands ▾ Custom view [Grid Icon] [List Icon] [Table Icon] Display [25] Items per page

Actions	Name ▾	Filing category	Date ▴ ▾	Status
▢ ▾	Invoice_Carat Ltd_FA00007	Default	2016-03-31 11:30	💬

- Audit trail
- Properties
- Download
- Preview
- Share document
- Add Link**
- Add a new version
- Manage versions
- Copy
- Move
- Modify
- Lock
- Delete
- Add to favorites
- Set a reminder



Open Bee™ Portal

Search

Hello Romain Arpin  
[User guide](#) | [Video tutorial](#) | [Sign out](#)

Drop a document

Share a document

Dashboard

Documents

Filing

Workflow

Administration

Hide menu

EN English

Purchase order\_Cara....pdf

Afficher tous les téléchargements...

### Documents

/ Bijou Ltd / Sales Dpt / Customers files / Carat Ltd / Purchase orders / (2 items)

Smart view

Actions on the selection - Current folder commands -

Custom view Display 25 Items per page

Actions	Name	Filing category	Date	Status
	Purchase order_Carat Ltd_BC00007	Default	2016-03-31 11:30	
	Purchase order_Carat Ltd_BC00032	Default	2016-03-31 11:30	

Root folder

My documents

Bijou Ltd

- Accounting dpt
- HR Dpt
- Marketing dpt
- Sales Dpt
  - Customers files
    - Carat Ltd
      - Delivery forms
      - Invoices
      - Purchase orders
      - Quotes
    - Diamond Ltd
    - Platine & son
  - Technical dpt

### 3.3.4.2 Preview

This feature lets you view your documents without having to download them first.

#### Documents

/ Bijou Ltd / Sales Dpt / Customers files / Carat Ltd / Delivery forms / (1 element)

Smart view

Actions on the selection - Current folder commands -

Custom view Display 25 Items per page

Actions	Name	Filing category	Date	Status
	Delivery form_Carat Ltd_BL00007	Default	2016-03-31 11:29	

- Audit trail
- Properties
- Download
- Preview
- Share document
- Add Link
- Add a new version
- Manage versions
- Copy
- Move
- Modify
- Lock
- Delete
- Check integrity
- Give back
- Destroy
- Add to favorites
- Set a reminder



## Documents

🏠 / Bijou Ltd / Sales Dpt / Customers files / Carat Ltd / Purchase orders /

Document preview : Purchase\_order\_Carat Ltd\_BC00007

Page: 1 of 1 Automatic Zoom

**Bijou SA**  
Bijouterie - Joaillerie  
70, rue des Orlévières  
BP 312  
75009 Paris

Numéro	Date	N°télécopie client	<b>Carat Ltd</b> Yves Debanne 144, route de Vannes BP 14 44000 NANTES
BC00007	12/01/15	02 40 48 67 90	
Référence	N°intracommunautaire client		
df152	FR373087844356		

**Purchase order**

Date de livraison	Adresse de livraison
mardi 10 février 2015	<b>Carat S.a.r.l</b> 144, route de Vannes BP 14 44000 NANTES France

Cher Client,

Monsieur le client, nous vous remercions de votre confiance. Nous vous adressons ci-joint le bon de commande et le bon de livraison.

**Document properties**

Parent folder Actions on the document

Document name  
Purchase\_order\_Carat Ltd\_BC00007

Status  
🗨

Metadata  
No metadata associated to this document

Format - Size  
Application PDF - 8.99 KB

Description

Last consultation  
👤 Romain Arpin 2016-04-01 10:35

Creation  
👤 Romain Arpin 2016-03-31 11:30

Less info 📄

### 3.3.4.3 Send and share

[Share documents and folders](#)

### 3.3.4.4 Audit trail

[Documents and folders history](#)

### 3.3.4.5 Properties

This feature gives you the ability to view information related to the document:

- ID: unique document identifier
- Path: Storage document path in the Open Bee™ Portal tree structure.
- Description
- Creator
- Creation / modification date
- File path : Storage path on the file server associated to the document
- Document size



- Document type

To access the properties, select the document and click "**Properties**" from the drop-down menu.

The following window appears and gives you all the document information.

Documents

🏠 / Bijou Ltd / Sales Dpt / Customers files / Carat Ltd / Purchase orders / (2 items)

Smart view

Actions on the selection • Current folder commands •

Custom view [icon] [icon] Display [25] items per page

Actions	Name	Filing category	Date	Status
	Purchase order_Carat Ltd_BC00007	Default	2016-03-31 11:30	
	Audit trail_Carat Ltd_BC00032	Default	2016-03-31 11:30	

Properties

- Download
- Preview
- Share document
- Add Link
- Add a new version
- Manage versions
- Copy
- Move
- Modify
- Lock
- Delete
- Add to favorites
- Set a reminder

### Document properties

Document ID : 29

Path : /Bijou Ltd/Sales Dpt/Customers files/Carat Ltd/Purchase orders/

Description :

Created by: Romain Arpin

Created on: 2016-03-31 11:30

Modified on: 2016-03-31 11:30

File path: /var/www/vhosts/userguide-en.openbeeccloud.com/httpdocs/data/Documents/00/3

File size: 8.99 KB

Filing category: Default

Md5: 509c705441fd70f86aaaa7a42f482303

Sha256: fc344b845604b0ac2354aa66c7292c179026b7090e248ce2d08c9f9c45fad488

To delete an item, you must:

- Select the document and click "**Delete**" from the drop-down list.



- A message appears asking to confirm the deletion. Click **"OK"** or **"Cancel"**.
- Once the document is deleted, a confirmation message appears.

### 3.3.4.6 Manage versions

This feature lets you view the version history of a document and change the current version.

#### Documents

Home / Bijou Ltd / Sales Dpt / Customers files / Carat Ltd / Purchase orders / (2 items)

Smart view

Actions on the selection - Current folder commands - Custom view [Grid] Display [25] Items per page

Actions	Name	Filing category	Date	Status
	Purchase order_Carat Ltd_BC00007	Default	2016-03-31 11:30	
	Carat Ltd_BC00032	Default	2016-03-31 11:30	

Left sidebar (Smart view):

- Root folder
- My documents
- Bijou Ltd
  - Accounting dpt
  - HR Dpt
  - Marketing dpt
  - Sales Dpt
    - Customers files
      - Carat Ltd
        - Delivery forms
        - Invoices
        - Purchase orders
        - Quotes
        - Diamond Ltd
        - Platine & son
- Technical dpt

Context menu (right-click on 'Carat Ltd\_BC00032'):

- Audit trail
- Properties
- Download
- Preview
- Share document
- Add Link
- Add a new version
- Manage versions**
- Copy
- Move
- Modify
- Lock
- Delete
- Add to favorites
- Set a reminder

The document different versions' list appears:

#### Manage versions

Version	Name	Created on	Modified on	Created by
<input checked="" type="radio"/> 1	Purchase order_Carat Ltd_BC00007	2016-03-31 11:30	2016-03-31 11:30	Romain Arpin X

**Set as current version**

- Choose the version you want to use as current version
- Select it by checking it (Version column)
- Click **"Use as current version"**



### 3.3.4.7 Add a new version

This feature adds a new version of a document.

Documents

🏠 / Bijou Ltd / Sales Dpt / Customers files / Carat Ltd / Purchase orders / (2 items)

Smart view

Actions on the selection **Current folder commands** Custom view Display 25 Items per page

Actions Name Filing category Date Status

	Purchase order_Carat Ltd_BC00007	Default	2016-03-31 11:30	
	Carat Ltd_BC00032	Default	2016-03-31 11:30	

📁 Root folder

- 📁 My documents
- 📁 Bijou Ltd
  - 📁 Accounting dpt
  - 📁 HR Dpt
  - 📁 Marketing dpt
  - 📁 Sales Dpt
    - 📁 Customers files
      - 📁 Carat Ltd
        - 📁 Delivery forms
        - 📁 Invoices
        - 📁 Purchase orders
        - 📁 Quotes
        - 📁 Diamond Ltd
        - 📁 Platine & son
      - 📁 Technical dpt

Context menu for 'Carat Ltd\_BC00032':

- Audit trail
- Properties
- Download
- Preview
- Share document
- Add Link
- + Add a new version**
- Manage versions
- Copy
- Move
- Modify
- Lock
- Delete
- Add to favorites
- Set a reminder

You can then choose a new file on your computer:

### Add a new version

Document to download **Browse...**

Document description

**Save**

Once saved, this file will become the current version.

openbee THE OPEN SOURCE SOFTWARE COMPANY

📁 Documents

🏠 / extranet customer records / Grenat pour toi / Purchase order

the New version has been successfully added (1 element)

Smart view

Add document

Actions Name Filing category Date Status

	Grenat pour toi_Purchase order_10-01-2019	Customer records	2019-05-24 14:01	
--	---	------------------	------------------	--

📁 Root folder

- 📁 My documents
- 📁 extranet customer records
  - 📁 Grenat pour toi
    - 📁 Purchase order
    - 📁 Forms
    - 📁 Marketing
    - 📁 Purchasing
    - 📁 Sales



### 3.3.4.8 Copy

This feature provides the ability to make a copy of a document in a folder of your choice.

- Select the document,
- Click **"Copy"** from the drop down list.

Documents

The screenshot shows the Open Bee Portal interface. At the top, a breadcrumb trail reads: [Home](#) / [Bijou Ltd](#) / [Sales Dpt](#) / [Customers files](#) / [Carat Ltd](#) / [Delivery forms](#) / (1 element). Below this, there are two tabs: 'Actions on the selection' and 'Current folder commands'. The main area displays a table with columns: Actions, Name, Filing category, Date, and Status. A single document is listed: 'Delivery form\_Carat Ltd\_BL00007' with a filing category of 'Default' and a date of '2016-03-31 11:29'. A context menu is open over this document, listing various actions. The 'Copy' action is highlighted with a red rectangle. Other actions include Audit trail, Properties, Download, Preview, Share document, Add Link, Add a new version, Manage versions, Move, Modify, Lock, Delete, Check integrity, Give back, Destroy, Add to favorites, and Set a reminder.

- Choose the destination folder in which you want to copy your document
- Click on **"Copy."**

The screenshot shows a dialog box titled 'Select destination folder'. It contains a tree view with the following structure: Root folder, My documents, Bijou Ltd, and Open Bee Ltd. At the bottom of the dialog, there is an 'Add folder' button with a plus icon and a 'Copy' button.

A confirmation message indicates that your document has been copied successfully.



### 3.3.4.9 Move

This feature provides the ability to move a document to another folder of your choice.

- Select the document,
- Click on **"Move"** from the drop-down list.

#### Documents

Home / Bijou Ltd / Sales Dpt / Customers files / Carat Ltd / Purchase orders / (2 items)

Smart view

Actions on the selection Current folder commands

Custom view Display 25 Items per page

Actions	Name	Filing category	Date	Status
	Purchase order_Carat Ltd_BC00007	Default	2016-03-31 11:30	
	Purchase order_Carat Ltd_BC00032	Default	2016-03-31 11:30	

Left sidebar (Smart view):

- Root folder
  - My documents
  - Bijou Ltd
    - Accounting dpt
    - HR Dpt
    - Marketing dpt
    - Sales Dpt
      - Customers files
        - Carat Ltd
          - Delivery forms
          - Invoices
          - Purchase orders
          - Quotes
          - Diamond Ltd
          - Platine & son
        - Technical dpt

Right-click context menu (highlighted 'Move'):

- Audit trail
- Properties
- Download
- Preview
- Share document
- Add Link
- Add a new version
- Manage versions
- Copy
- Move**
- Modify
- Lock
- Delete
- Add to favorites
- Set a reminder

- Choose the destination folder in which you want to move your document
- Click on **"Move"**.

Select destination folder

Left sidebar:

- Root folder
  - My documents
  - Bijou Ltd

Bottom buttons:

- Add folder
- Move

A confirmation message indicates that your document has been moved successfully.





### 3.3.4.10 Modify

You can modify a document if you have reading and modifying permissions.

To do this:

- Move to the document to be edited.
- Click on **"Modify"**

Documents

🏠 / Bijou Ltd / Sales Dpt / Customers files / Carat Ltd / Invoices / (1 element)

Smart view

Actions on the selection ▾ Current folder commands ▾

Custom view Display 25 ▾ Items per page

Actions	Name ▾	Filing category	Date ▲ ▾	Status
	Invoice_Carat Ltd_FA00007	Default	2016-03-31 11:30	

- Audit trail
- Properties
- Download
- Preview
- Share document
- Add Link
- Add a new version
- Manage versions
- Copy
- Move
- Modify**
- Lock
- Delete
- Add to favorites
- Set a reminder

Enter the new name and click **"Save"** to finish.

### Edit document properties

Name	<input type="text" value="Purchase order_Carat Ltd_BC00007"/>
Description	<input type="text"/>
Filing category	<input type="text" value="Supplier invoices"/>
Supplier name	<input type="text" value="abc"/>
Invoice number	<input type="text" value="abc"/>
Invoice date	<input type="text"/>
Amount	<input type="text" value="0,1"/>

Save

This feature is also useful to change a document metadata following an indexing error.



### 3.3.4.11 Edit online

This operation is only available for Microsoft Office documents.

See : [Edition d'un document Microsoft Office](#)

### 3.3.4.12 Delete

This feature allows to delete a document. A deleted document is moved in a global recycle bin and can be restored by an administrator.

#### Documents

Home / Bijou Ltd / Sales Dpt / Customers files / Carat Ltd / Purchase orders / (2 items)

Smart view

Actions on the selection Current folder commands

Custom view Display 25 Items per page

Actions	Name	Filing category	Date	Status
	Purchase order_Carat Ltd_BC00007	Default	2016-03-31 11:30	
	Carat Ltd_BC00032	Default	2016-03-31 11:30	

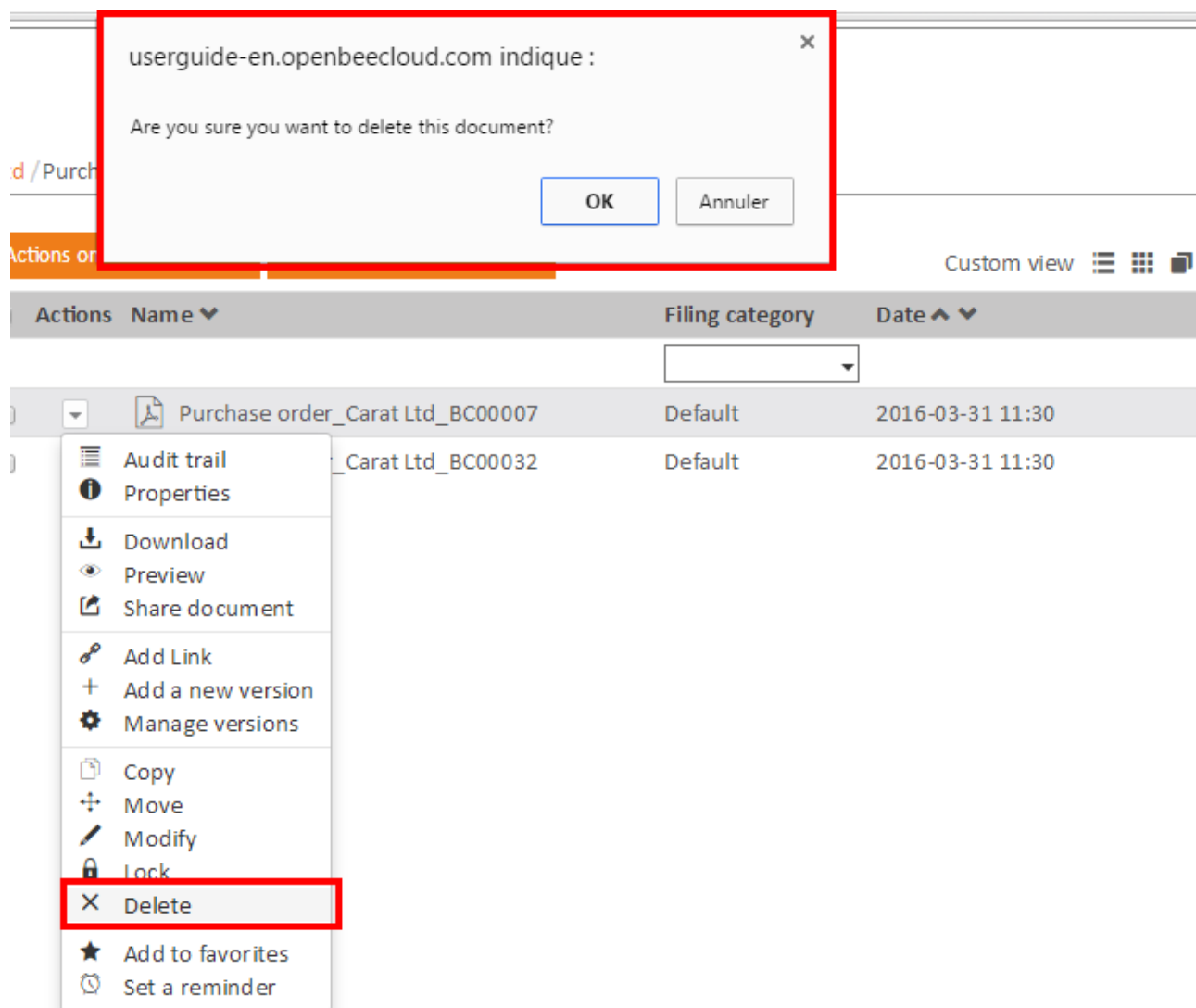
Left sidebar (Smart view):

- Root folder
  - My documents
  - Bijou Ltd
    - Accounting dpt
    - HR Dpt
    - Marketing dpt
    - Sales Dpt
      - Customers files
        - Carat Ltd
          - Delivery forms
          - Invoices
          - Purchase orders
          - Quotes
          - Diamond Ltd
          - Platine & son
        - Technical dpt

Context menu (right-clicked on 'Carat Ltd\_BC00032'):

- Audit trail
- Properties
- Download
- Preview
- Share document
- Add Link
- Add a new version
- Manage versions
- Copy
- Move
- Modify
- Lock
- Delete**
- Add to favorites
- Set a reminder

A confirmation window appears. Click "OK" to confirm the deletion:



### 3.3.4.13 Add link

The "Add Link" feature allows to define links between documents.

Indeed, it may be useful to connect two or more documents between them, especially if they deal with the same subject, but are stored in different locations.

To add a link:

- Select the document you want to link to another.
- Select "Add a link" from the drop-down menu.



### Add Link

Suggested documents :

No suggested item

If related documents are detected, they will be suggested in the **"Suggested documents"** section.

To function, the automatic document suggestion must first be [setup by the administrator](#).





Example :

A user wants to link a 100 € invoice issued by the Open Bee™ company.



If a 100 € purchase order of the Open Bee™ company is archived, it will appear in the "Suggested documents" section.



**Add Link**



Suggested documents :



Document name	Metadata	
<input type="checkbox"/>  Natasha cover letter	Document issuer-Document issuer: Natasha	



[Search document](#) [Add document](#)



  Root folder

  My documents

  Construction

  Factures

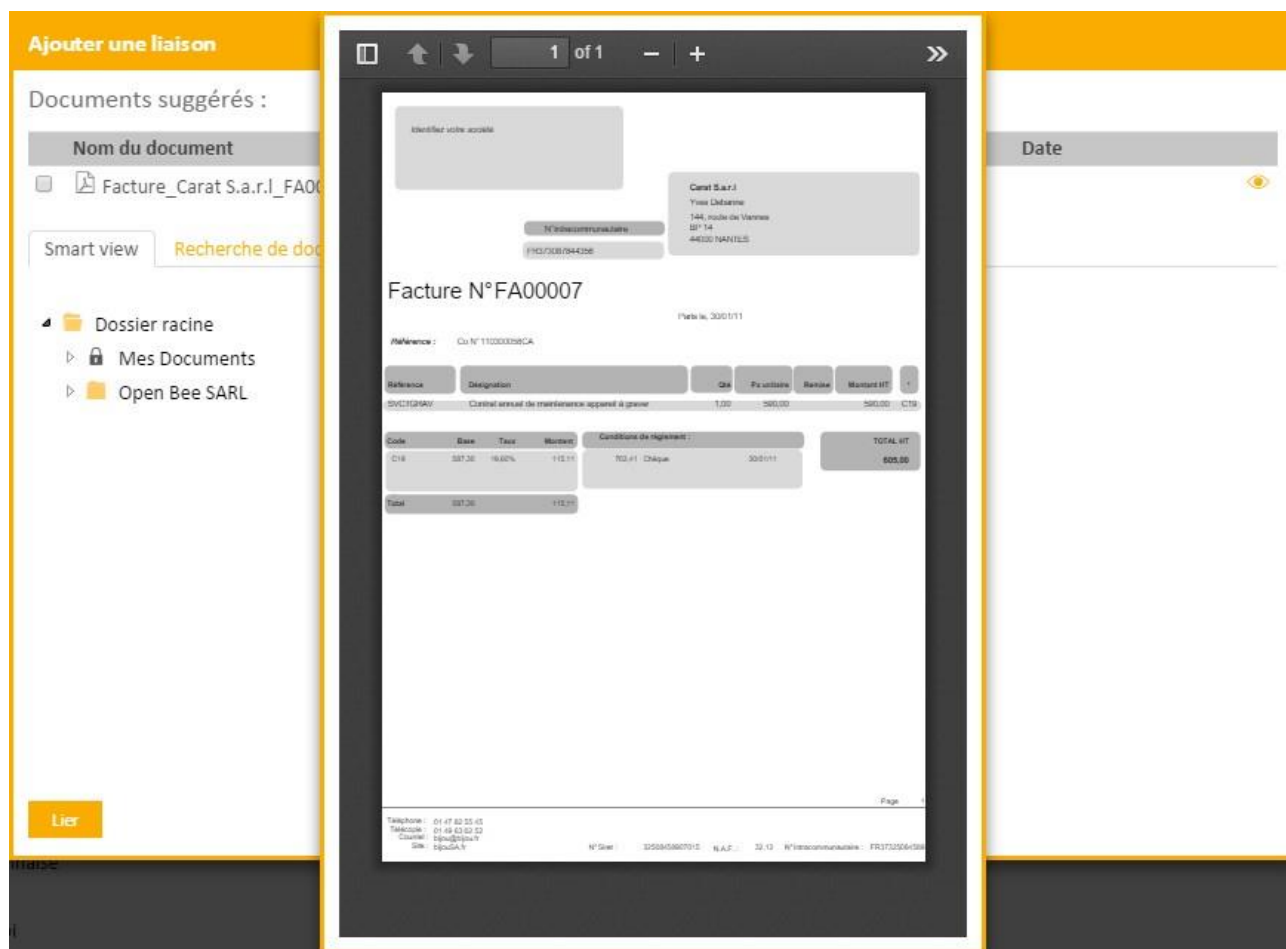
  HR department

  Sales department

**Link**



Suggested documents can be viewed by clicking on the icon located to the right of the screen:



To link a document that has not been "suggested", three options are available :

1. Browse your files tree structure to select the document you want to bind your document to (by checking them)



**Add Link**

Suggested documents :

Document name	Metadata	
<input type="checkbox"/> Natasha cover letter	Document issuer-Document issuer: Natasha	

[Search document](#) [Add document](#)

- Root folder
  - My documents
  - Construction
  - Factures
  - HR department
    - Employee File Management
      - ☐ Natasha cover letter
      - ☐ Natasha response to CV
    - Employee Onboarding
    - Employee Separation
    - Policies and Procedures
    - Recruiting & Selection
  - Sales department

[Link](#)

2. Use the document search. Click on the « **Search document** » tab, choose the search criteria, then validate and select the document of your choice.



**Add Link**

Suggested documents :

Document name	Metadata
<input type="checkbox"/> Natasha cover letter	Document issuer-Document issuer: Natasha

**Smart view** Search document **Add document**

Document content

natasha

Filing category

Employment

Comment

equal

Document date

equal

Document issuer

equal

Type of document

Validate

3. Add a new document. Click on the **"Add document"** tab, and click browse to retrieve the document to be added.  
The added document will automatically be linked.





**Add Link**

Suggested documents :

Document name	Metadata
Natasha cover letter	Document issuer-Document issuer: Natasha

Smart view   Search document   Add document

Root folder

My documents

Construction

Factures

HR department

Sales department

File to upload \*

Browse...

Filing category

Default

Document name \*

Advanced settings ▼

Save



The paperclip icon appears automatically. This indicates that a link was created on the document.

#### 3.3.4.14 Lock

It is sometimes necessary to make changes to a document contained in Open Bee™ Portal.

In this case, it is more careful to lock the document to prevent other users from changing it simultaneously.

To lock a document, click on **"Lock"** from the dropdown menu. To unlock, click **"Unlock"** from the dropdown menu.



## Documents

🏠 / Bijou Ltd / Sales Dpt / Customers files / Carat Ltd / Invoices / (1 element)

Smart view

- Root folder
  - My documents
  - Bijou Ltd
    - Accounting dpt
    - HR Dpt
    - Marketing dpt
    - Sales Dpt
      - Customers files
        - Carat Ltd
          - Delivery forms
          - Invoices
          - Purchase orders
          - Quotes
          - Diamond Ltd
          - Platine & son
  - Technical dpt

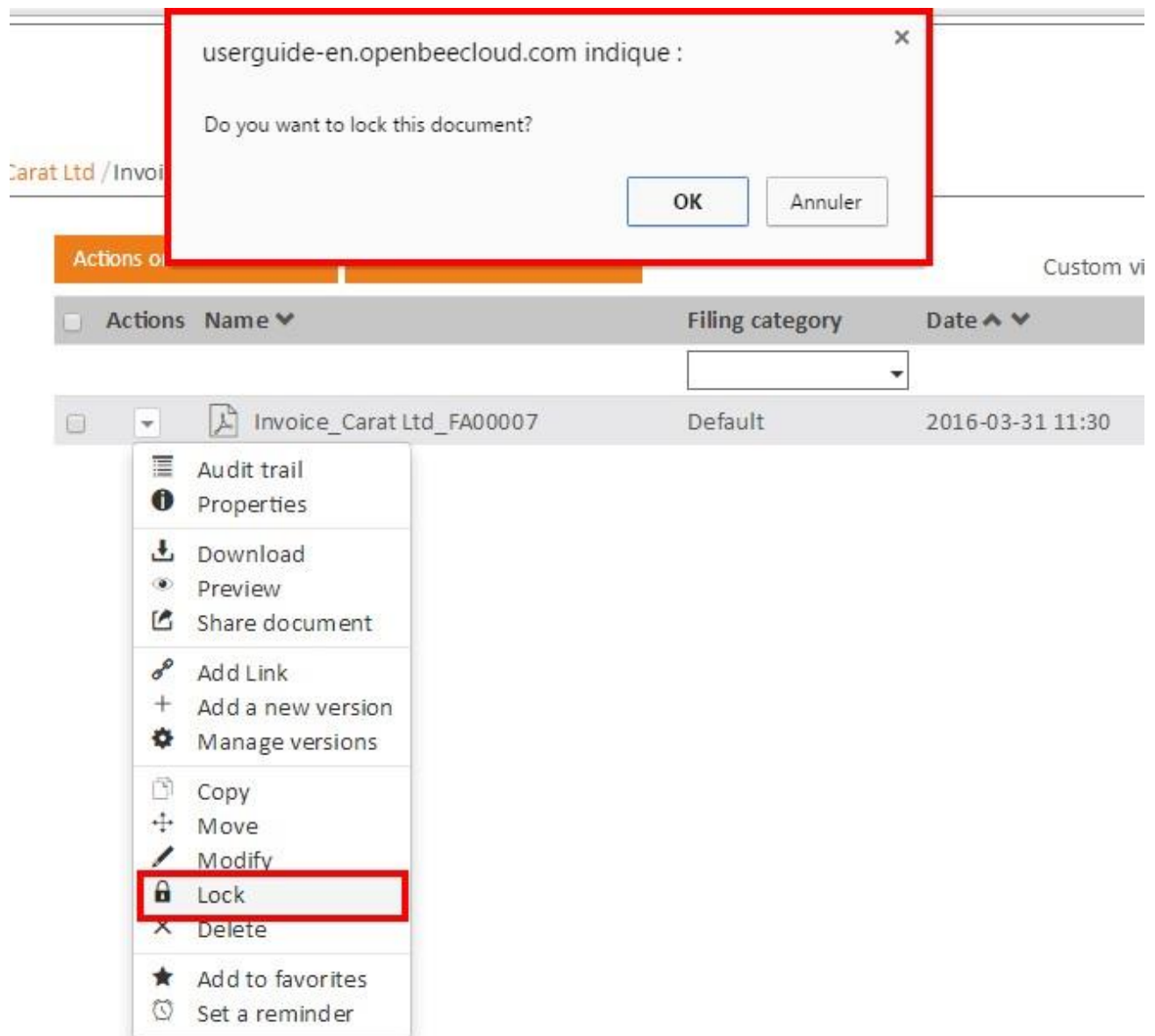
Actions on the selection ▾ Current folder commands ▾

Custom view Display 25 ▾ Items per page

<input type="checkbox"/>	Actions	Name ▾	Filing category	Date ▲ ▾	Status
<input type="checkbox"/>		Invoice_Carat Ltd_FA00007	Default	2016-03-31 11:30	

- Audit trail
- Properties
- Download
- Preview
- Share document
- Add Link
- Add a new version
- Manage versions
- Copy
- Move
- Modify
- Lock**
- Delete
- Add to favorites
- Set a reminder

Confirm the action by clicking on "OK":



A confirmation message appears.

The only users that can unlock a document are:

- The user who locked it
- An administrator



On a locked document, the following actions are only accessible to **the user who locked the document**:

- Edit the document name and description
- Edit document index
- Add a version
- Change the version
- Download the document
- Delete the document

Other users can not download or edit a locked document.

#### **3.3.4.15      Add to favorites**

[Favorites management](#)

#### **3.3.4.16      Set a reminder**

[Reminders on documents and folders](#)

#### **3.3.4.17      Add a comment**

[Comments on documents and folders](#)

### **3.3.5          Actions on the folder**

#### **3.3.5.1        History**

[Documents and folders history](#)



### 3.3.5.2 Add a folder

#### Documents

🏠 / Bijou Ltd / (4 items)

Smart view

Actions on the selection ▾ Current folder commands ▾ Custom view Display 25 ▾ Items per page

<input type="checkbox"/>	Actions	Name ▾	Filing category	Date ▴ ▾	Status
<input type="checkbox"/>	▾	HR Dpt		2016-03-24 10:46	
<input type="checkbox"/>	History			2016-03-24 17:03	
<input type="checkbox"/>	Share			2016-03-24 10:46	
<input type="checkbox"/>	Add folder			2016-03-24 17:03	
<input type="checkbox"/>	Add document				
<input type="checkbox"/>	Import from zip				
<input type="checkbox"/>	Copy				
<input type="checkbox"/>	Move				
<input type="checkbox"/>	Modify this folder				
<input type="checkbox"/>	Delete				
<input type="checkbox"/>	Add to favorites				
<input type="checkbox"/>	Turn on notifications				
<input type="checkbox"/>	Set a reminder				
<input type="checkbox"/>	Manage permissions				
<input type="checkbox"/>	Export to zip				

To add a folder in the current folder or the root folder, click **"Add folder"** from the **"Actions"** column's drop-down list in Open Bee™ Portal

The following window appears:

### Add a folder to HR Dpt

Name

Folder type

Default ▾

Description

Add folder

- Enter a name for the folder and its description if you want
- Click on "Add folder" to complete the operation



### Folders names' length

A folder name's length is limited to 255 characters. Adding a document with a greater name length is possible but the **name will be truncated**.

Open Bee™ Portal is "**case insensitive**", meaning that **it is not possible** to create two folders with the same name, using a different combination of lowercase / uppercase.

Example : « Invoices » and « invoices ».

#### 3.3.5.3 Add a document

Click "**Add document**" in the "**Actions**" column's drop-downlist.

##### Documents

/ Bijou Ltd / (4 items)

Smart view

- Root folder
- My documents
- Bijou Ltd
  - HR Dpt
  - Marketing dpt
  - Sales Dpt
  - Technical dpt

Actions on the selection		Current folder commands		Custom view		Display	25	Items per page
Actions	Name	Filing category	Date	Status				
	HR Dpt		2016-03-24 10:46					
	History		2016-03-24 17:03					
	Share		2016-03-24 10:46					
	Add folder		2016-03-24 17:03					
	Add document							
	Import from zip							
	Copy							
	Move							
	Modify this folder							
	Delete							
	Add to favorites							
	Turn on notifications							
	Set a reminder							
	Manage permissions							
	Export to zip							



The following window appears:

**Add document**

Document to download

Filing category

Document name

Document description

- Enter the document name and description
- Click "**Browse ....**"
- Select the file to be added
- Choose the document type (default or other)
- Click "**Add document**"
- The confirmation message: "**The folder has been successfully added**" appears

### Supported formats for indexing

The document content is automatically indexed by Open Bee™ Portal for the following formats :

- .pdf (Pdf text)
- .doc, .docx (Word)
- .xls, .xlsx, .csv (Excel)
- .pptx (Power Point 2007 Presentation)
- .txt (Text document)
- .rtf (Rich Text Format)
- .odt, .ods, .odp, .odg (Open Office)



### Name's length

The document name's length is limited to 255 characters. Adding a greater document name's length is possible but the **name will be truncated**.

#### 3.3.5.4 Import from Zip

##### Documents

/ Bijou Ltd / (4 items)

Smart view

- Root folder
- My documents
- Bijou Ltd
  - HR Dpt
  - Marketing dpt
  - Sales Dpt
  - Technical dpt

Actions on the selection ▾ Current folder commands ▾ Custom view Display 25 Items per page

Actions	Name ▾	Filing category	Date ▴ ▾	Status
	HR Dpt		2016-03-24 10:46	
	History		2016-03-24 17:03	
	Share		2016-03-24 10:46	
	Add folder		2016-03-24 17:03	
	Add document			
	Import from zip			
	Copy			
	Move			
	Modify this folder			
	Delete			
	Add to favorites			
	Turn on notifications			
	Set a reminder			
	Manage permissions			
	Export to zip			

### Import from zip file

Document to download

Browse...

Import

This module provides the ability to import a folder tree structure and mass documents from a ZIP file.





To do this:

- Move to the folder in which you want to import your files and folder tree
- Click "**Import from ZIP**" from the drop-down menu "**Actions**"
- Click "**Browse**" to locate on your PC the ZIP file to import
- Click "**Import**" to complete the operation

**NB:** ZIP files created with WinRar use encoding that is not fully recognized by Open Bee™ Portal.

We recommend using 7Zip or Windows Explorer to create the files to import.

### 3.3.5.5 Export to ZIP

Documents

/ Bijou Ltd / (5 items)

Smart view

- Root folder
- My documents
- Bijou Ltd
  - Accounting dpt
  - HR Dpt
  - Marketing dpt
  - Sales Dpt
  - Technical dpt
  - Open Bee Ltd

Actions on the selection - Current folder commands - Custom view [icon] [icon] [icon] Display [25] Items per page

Actions	Name	Filing category	Date	Status
[icon]	Accounting dpt		2016-03-28 12:16	[icon]
[icon]	History		2016-03-24 10:46	[icon]
[icon]	Share		2016-03-24 17:03	[icon]
[icon]	Add folder		2016-03-24 10:46	[icon]
[icon]	Add document		2016-03-24 17:03	[icon]
[icon]	Import from zip			

[icon] Copy  
[icon] Move  
[icon] Modify this folder  
[icon] Delete  
[icon] Destroy  
[icon] Check integrity  
[icon] Export the inventory  
[icon] Add to favorites  
[icon] Turn on notifications  
[icon] Set a reminder  
[icon] Manage permissions  
[icon] Export to zip



**Open Bee™ Portal**  Hello Romain Arpin [User guide](#) | [Video tutorial](#) | [Sign out](#)

[Drop a document](#)  
[Share a document](#)

[Dashboard](#)  
[Documents](#)  
[Filing](#)  
[Workflow](#)  
[Administration](#)

Hide menu

EN English

HR Dptzip

### Documents

/ Bijou Ltd / (4 items)

Smart view Actions on the selection Current folder commands Custom view Display 25 Items per page

Actions	Name	Filing category	Date	Status
<input type="checkbox"/>	HR Dpt		2016-03-24 10:46	
<input type="checkbox"/>	Marketing dpt		2016-03-24 17:03	
<input type="checkbox"/>	Sales Dpt		2016-03-24 10:46	
<input type="checkbox"/>	Technical dpt		2016-03-24 17:03	

[Afficher tous les téléchargements...](#)

### 3.3.5.6 Copy a folder

### Documents

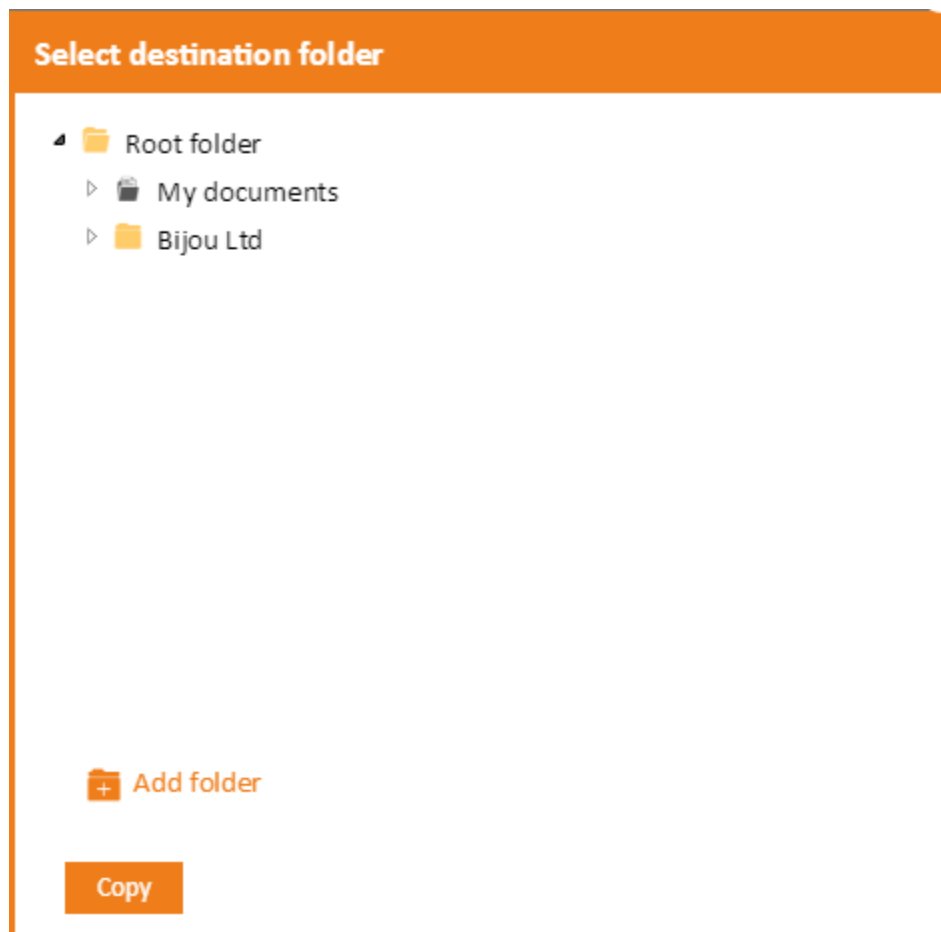
/ Bijou Ltd / (5 items)

Smart view Actions on the selection Current folder commands Custom view Display 25 Items per page

Actions	Name	Filing category	Date	Status
<input type="checkbox"/>	Accounting dpt		2016-03-28 12:16	
<input type="checkbox"/>	History		2016-03-24 10:46	
<input type="checkbox"/>	Share		2016-03-24 17:03	
<input type="checkbox"/>	Add folder		2016-03-24 10:46	
<input type="checkbox"/>	Add document		2016-03-24 17:03	
<input type="checkbox"/>	Import from zip		2016-03-24 17:03	

**Copy**

Move  
Modify this folder  
Delete  
Destroy  
Check integrity  
Export the inventory  
Add to favorites  
Turn off notifications  
Set a reminder  
Manage permissions  
Export to zip



### 3.3.5.7 Modify a folder

You can change a folder (if you have the rights).

To do so :

- Click the drop-down menu (below the "**Actions**" column)



## Documents

🏠 / Bijou Ltd / (4 items)

Smart view

- Root folder
  - My documents
  - Bijou Ltd
    - HR Dpt
    - Marketing dpt
    - Sales Dpt
    - Technical dpt

Actions on the selection ▾

Current folder commands ▾

Custom view Display 25 Items per page

<input type="checkbox"/>	Actions	Name ▾	Filing category	Date ▲ ▾	Status
<input type="checkbox"/>		HR Dpt		2016-03-24 10:46	
<input type="checkbox"/>		History		2016-03-24 17:03	
<input type="checkbox"/>		Share		2016-03-24 10:46	
<input type="checkbox"/>		Add folder		2016-03-24 17:03	
<input type="checkbox"/>		Add document			
<input type="checkbox"/>		Import from zip			
<input type="checkbox"/>		Copy			
<input type="checkbox"/>		Move			
<input type="checkbox"/>		Modify this folder			
<input type="checkbox"/>		Delete			
<input type="checkbox"/>		Add to favorites			
<input type="checkbox"/>		Turn on notifications			
<input type="checkbox"/>		Set a reminder			
<input type="checkbox"/>		Manage permissions			
<input type="checkbox"/>		Export to zip			

- Click on "**Modify this folder**"
- Make changes
- Click on "**Save**" to complete the operation

### Edit folder properties

Name	<input type="text" value="HR Dpt"/>
Folder type	<input type="text" value="Default"/>
Description	<div></div>
<div>Save</div>	



### 3.3.5.8 Delete a folder

#### Documents

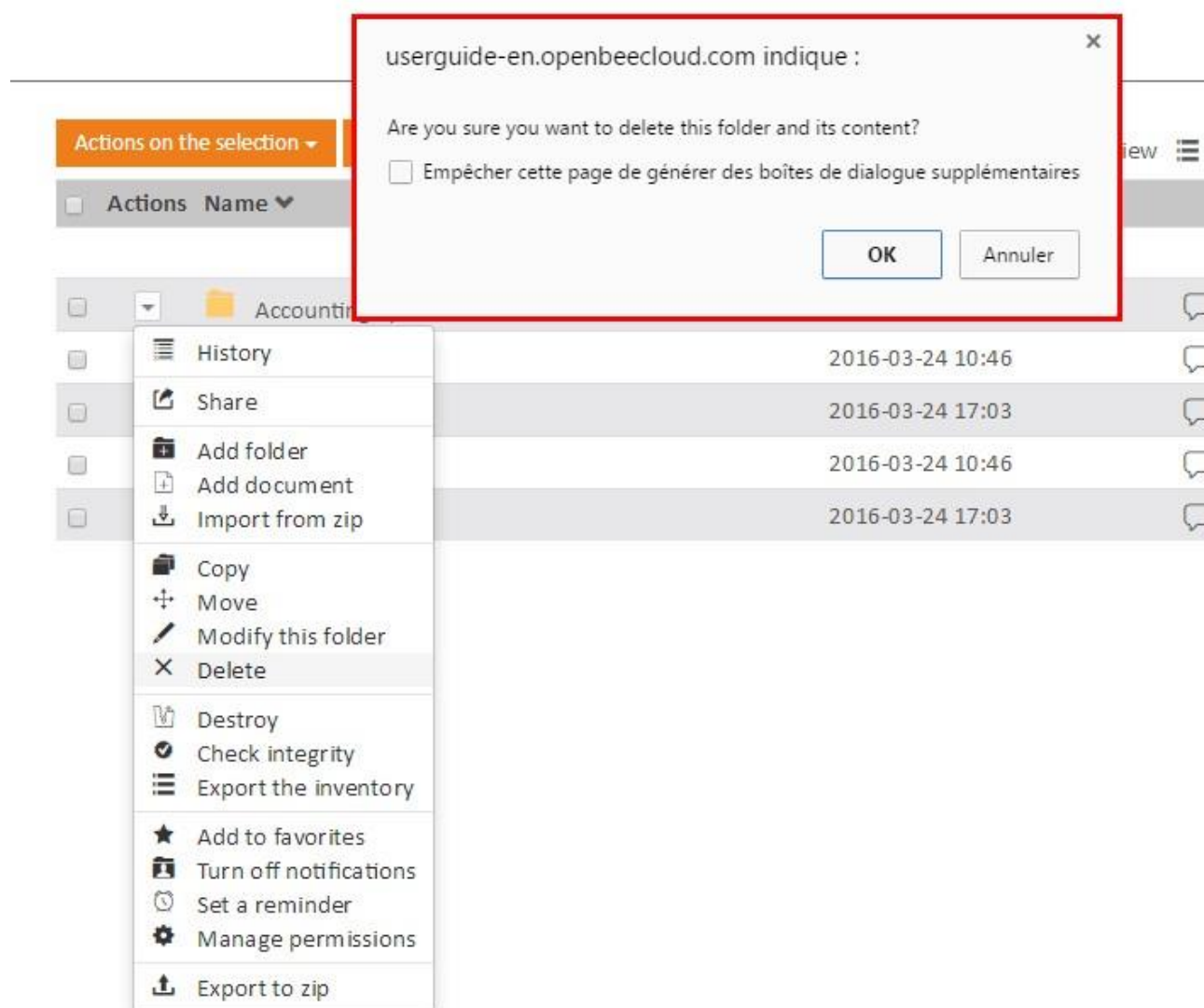
🏠 / Bijou Ltd / (5 items)

Smart view

- Root folder
  - My documents
    - Accounting dpt
    - Andrew Smith
    - John Dumond
    - Natasha St Martin
    - Patricia Durand
    - Peter Martin
    - Romain Arpin
    - Sandra Dujardin
  - Bijou Ltd
    - Accounting dpt
    - HR Dpt
    - Marketing dpt
    - Sales Dpt
      - Customers files
      - Technical dpt
  - Open Bee Ltd
    - Sales Department
      - Customer records

Actions on the selection ▾ Current folder commands ▾ Custom view Display 25 ▾ Items per page

<input type="checkbox"/>	Actions	Name ▾	Filing category	Date ▲ ▾	Status
<input type="checkbox"/>	▾	Accounting dpt		2016-03-28 12:16	
<input type="checkbox"/>	History			2016-03-24 10:46	
<input type="checkbox"/>	Share			2016-03-24 17:03	
<input type="checkbox"/>	Add folder			2016-03-24 10:46	
<input type="checkbox"/>	Add document			2016-03-24 17:03	
<input type="checkbox"/>	Import from zip				
<input type="checkbox"/>	Copy				
<input type="checkbox"/>	Move				
<input type="checkbox"/>	Modify this folder				
<input type="checkbox"/>	Delete				
<input type="checkbox"/>	Destroy				
<input type="checkbox"/>	Check integrity				
<input type="checkbox"/>	Export the inventory				
<input type="checkbox"/>	Add to favorites				
<input type="checkbox"/>	Turn off notifications				
<input type="checkbox"/>	Set a reminder				
<input type="checkbox"/>	Manage permissions				
<input type="checkbox"/>	Export to zip				





### 3.3.5.9 Move a folder

#### Documents

/ Bijou Ltd / (4 items)

Smart view

- Root folder
  - My documents
    - Bijou Ltd
      - HR Dpt
      - Marketing dpt
      - Sales Dpt
      - Technical dpt

Actions on the selection ▾ Current folder commands ▾

Custom view Display 25 ▾ Items per page

<input type="checkbox"/>	Actions	Name ▾	Filing category	Date ▴ ▾	Status
<input type="checkbox"/>		HR Dpt		2016-03-24 10:46	
<input type="checkbox"/>		History		2016-03-24 17:03	
<input type="checkbox"/>		Share		2016-03-24 10:46	
<input type="checkbox"/>		Add folder		2016-03-24 17:03	
<input type="checkbox"/>		Add document			
<input type="checkbox"/>		Import from zip			
<input type="checkbox"/>		Copy			
<input type="checkbox"/>		Move			
<input type="checkbox"/>		Modify this folder			
<input type="checkbox"/>		Delete			
<input type="checkbox"/>		Add to favorites			
<input type="checkbox"/>		Turn on notifications			
<input type="checkbox"/>		Set a reminder			
<input type="checkbox"/>		Manage permissions			
<input type="checkbox"/>		Export to zip			

#### Select destination folder

- Root folder
  - My documents
  - Bijou Ltd

Add folder

Move



### 3.3.5.10 Subscribe to a folder

#### Documents

🏠 / Bijou Ltd / Sales Dpt / Customers files / (3 items)

Smart view

- Root folder
- My documents
- Bijou Ltd
  - Accounting dpt
  - HR Dpt
  - Marketing dpt
  - Sales Dpt
    - Customers files
      - Carat Ltd
      - Diamond Ltd
      - Platine & son
    - Technical dpt

Actions on the selection - Current folder commands - Custom view [Grid Icon] [List Icon] [Table Icon] Display [25] Items per page

Actions	Name	Filing category	Date	Status
	Carat Ltd		2016-03-24 10:46	
	History		2016-03-24 11:10	
	Share		2016-03-24 11:09	

- Add folder
- Add document
- Import from zip
- Copy
- Move
- Modify this folder
- Delete
- Add to favorites
- Turn on notifications**
- Set a reminder
- Manage permissions
- Export to zip

#### Documents

🏠 / Bijou Ltd / Sales Dpt / Customers files / (3 items)

Smart view

- Root folder
- My documents
- Bijou Ltd
  - Accounting dpt
  - HR Dpt
  - Marketing dpt
  - Sales Dpt
    - Customers files
      - Carat Ltd
      - Diamond Ltd
      - Platine & son
    - Technical dpt

Notifications for this folder are now turned on

Actions on the selection - Current folder commands - Custom view [Grid Icon] [List Icon] [Table Icon] Display [25] Items per page

Actions	Name	Filing category	Date	Status
	Carat Ltd		2016-03-24 10:46	
	Diamond Ltd		2016-03-24 11:10	
	Platine & son		2016-03-24 11:09	

### 3.3.5.11 Share a folder

[Share documents and folders](#)

### 3.3.5.12 Add to favorites

[Favorites management](#)

### 3.3.5.13 Add a reminder

[Reminders on documents and folders](#)

### 3.3.5.14 Add a comment

[Comments on documents and folders](#)





### 3.3.5.15 Manage permissions

#### Documents

/ Bijou Ltd / (4 items)

Smart view

Actions on the selection ▾ Current folder commands ▾ Custom view ▾ Display 25 ▾ Items per page

Root folder  
My documents  
Bijou Ltd  
HR Dpt  
Marketing dpt  
Sales Dpt  
Technical dpt

Actions Name ▾ Filing category Date ▾ Status

HR Dpt 2016-03-24 10:46 ★

History 2016-03-24 17:03

Share 2016-03-24 10:46

Add folder  
Add document  
Import from zip

Copy  
Move  
Modify this folder  
Delete

Remove from my favorites  
Turn on notifications  
Set a reminder  
**Manage permissions**  
Export to zip

Edit permissions for: /Bijou Ltd/HR Dpt

This folder is available for the following groups and users

	Read	Add folder	Delete	Edit	Manage permissions	Add a document	Version of the document	Export metadata	Give back	Digital signature
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Romain Arpin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

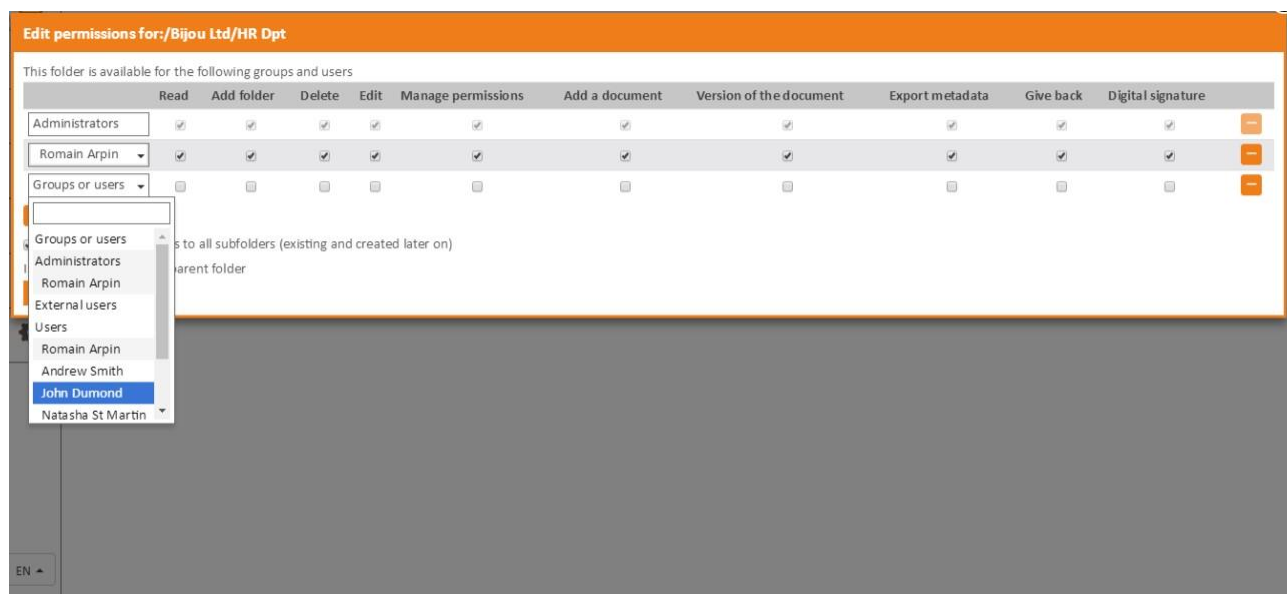
+ ☒ Apply those permissions to all subfolders (existing and created later on)  
Inherit permissions from parent folder  
Save permissions

Edit permissions for: /Bijou Ltd/HR Dpt

This folder is available for the following groups and users

	Read	Add folder	Delete	Edit	Manage permissions	Add a document	Version of the document	Export metadata	Give back	Digital signature
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Romain Arpin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Groups or users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

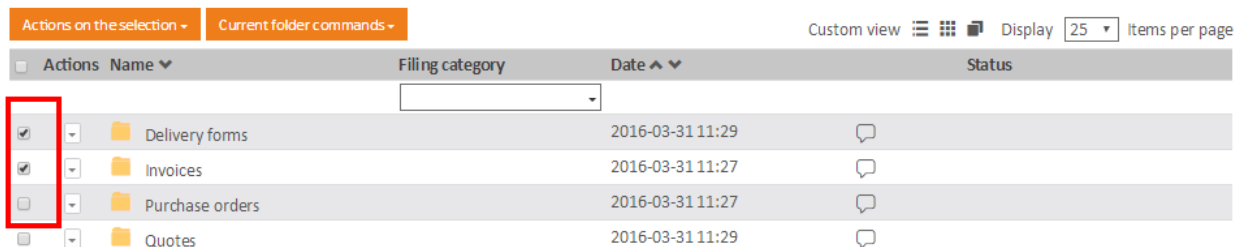
+ ☒ Apply those permissions to all subfolders (existing and created later on)  
Inherit permissions from parent folder  
Save permissions



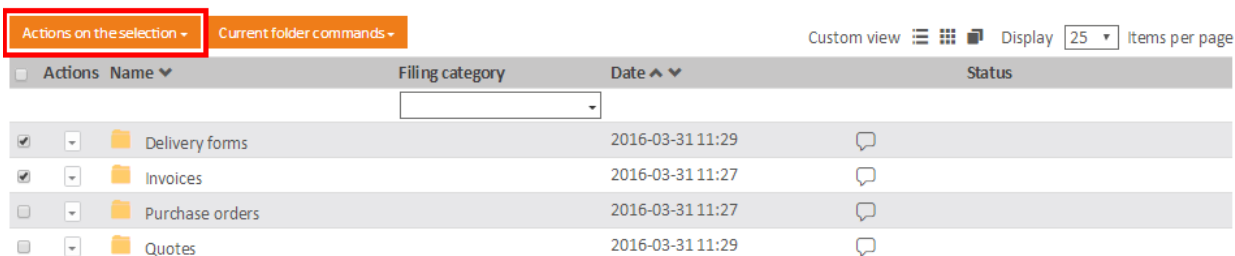
### 3.3.6 Actions on the selection

It is possible to perform actions on batches of folders and documents:

1. Select the folders and / or documents



2. Choose an action from the menu "Action on the selection":





The following actions are available:

### 3.3.6.1 Copy the selection

#### Documents

Home / Bijou Ltd / (5 items)

Smart view

- Root folder
  - My documents
    - Andrew Smith
    - John Dumond
    - Natasha St Martin
    - Patricia Durand
    - Peter Martin
    - Romain Arpin
    - Sandra Dujardin
  - Bijou Ltd
    - Accounting dpt
    - HR Dpt
    - Marketing dpt
    - Sales Dpt
    - Technical dpt

Actions on the selection

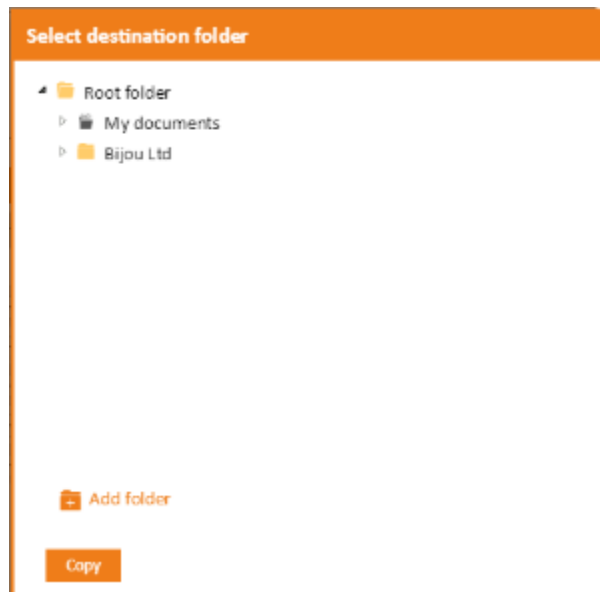
- Copy selected item(s)
- Move selected items
- Delete selected items
- Add selection to favorites
- Remove selection from favorites
- Subscribe to selected folders
- Unsubscribe from selected folders
- Export to zip

Current folder commands

Custom view [icon] [icon] Display [25] Items per page

Filing category	Date	Status
	2016-03-24 17:03	[icon]
	2016-03-24 10:46	[icon]
	2016-03-24 17:03	[icon]
	2016-03-24 10:46	[icon]
Technical dpt	2016-03-24 17:03	[icon]

The following window appears:



- Select the destination folder and click on the **"Copy"** button
- Once the items have been moved, a confirmation message appears.



### 3.3.6.2 Move the selection

#### Documents

🏠 / Bijou Ltd / (5 items)

Smart view

- Root folder
- My documents
- Bijou Ltd
  - Accounting dpt
  - HR Dpt
  - Marketing dpt
  - Sales Dpt
  - Technical dpt
  - Open Bee Ltd

Actions on the selection ▾

Current folder commands ▾

Custom view Display  Items per page

- Copy selected item(s)
- Move selected items
- Delete selected items
- Add selection to favorites
- Remove selection from favorites
- Subscribe to selected folders
- Unsubscribe from selected folders
- Export to zip

☒ ☐ Technical dpt

Filing category	Date ^ ▾	Status
<input type="text"/>		
	2016-03-28 12:16	
	2016-03-24 10:46	
	2016-03-24 17:03	
	2016-03-24 10:46	
	2016-03-24 17:03	

The following window appears:



- Select the destination folder and click on the **"Move"** button
- Once the items are moved, a confirmation message appears.



### 3.3.6.3 Delete the selection

Documents

🏠 / Bijou Ltd / (5 items)

Smart view

- Root folder
- My documents
- Bijou Ltd
  - Accounting dpt
  - HR Dpt
  - Marketing dpt
  - Sales Dpt
  - Technical dpt

Actions on the selection ▾ Current folder commands ▾

- Copy selected item(s)
- Move selected items
- Delete selected items**
- Add selection to favorites
- Remove selection from favorites
- Subscribe to selected folders
- Unsubscribe from selected folders
- Export to zip

Custom view ▢ ▢ ▢ Display 25 Items per page

Filing category	Date ^ ▾	Status
	2016-03-24 17:03	
	2016-03-24 10:46	
	2016-03-24 17:03	
	2016-03-24 10:46	
	2016-03-24 17:03	

A confirmation message appears. Click "OK" to confirm the deletion of elements.

userguide-en.openbeeccloud.com indique :

Are you sure you want to delete these items and their content?

OK Annuler

Actions on the selection ▾ Current folder commands ▾

- Copy selected item(s)
- Move selected items
- Delete selected items**
- Check integrity for selected documents
- Destroy selected item(s)?
- Add selection to favorites
- Remove selection from favorites
- Subscribe to selected folders
- Unsubscribe from selected folders
- Export to zip

Filing category	Date ^ ▾
000007	Default 2016-03-31 11:30
000032	Default 2016-03-31 11:30

**i** Deleted items are moved in a global system gecycle bin, which makes a restoration by the administrator



### 3.3.6.4 Add the selection to favorites

[Favorites management](#)

### 3.3.6.5 Remove the selection from favorites

[Favorites management](#)

### 3.3.6.6 Subscribe to selected folders

[Notifications management](#)

### 3.3.6.7 Unsubscribe from selected folders

[Notifications management](#)

### 3.3.6.8 Export to zip

[ZIP export](#)

## 3.3.7 Favorites management

This feature allows quick access to folders and documents you frequently consult thanks to the dashboard **"My Favorites"** zone .

To add an element to **"My Favorites"**:

- Click on **"Add to favorites"** from the document or folder's drop-down menu.

Documents

Documents

Root folder

My documents

Bigou Ltd

Accounting dpt

Web dpt

Marketing dpt

Sales dpt

Customers files

Carat Ltd

Delivery forms

Invoices

Purchase orders

Quotes

Diamond Ltd

Phone & son

Technical dpt

Actions on the selection of

Current folder command

Actions

Name

Filing category

Date

Status

Invoice\_Carat Ltd\_FAO0007

Default

2016-03-31 11:30

• Add to favorites

• Set a reminder

Custom view

Display

25

Items per

Folders

Documents

Root folder

My documents

Bigou Ltd

Accounting dpt

Web dpt

Marketing dpt

Sales dpt

Technical dpt

Open Bee Ltd

Actions on the selection of

Current folder command

Actions

Name

Filing category

Date

Status

Accounting dpt

2016-03-28 12:58

History

2016-03-24 10:46

Share

2016-03-24 17:03

Add folder

2016-03-24 10:46

Add document

2016-03-24 17:03

Import from zip

2016-03-24 17:03

Copy

Move

Modify this folder

Delete

Destiny

Check integrity

Export the inventory

Add to favorites

Turn off notifications

Set a reminder

Manage permissions

Export to zip

Custom view

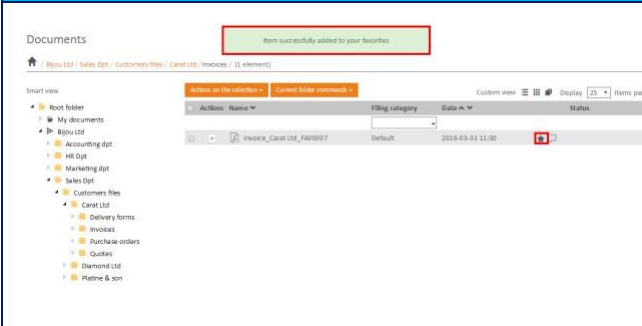
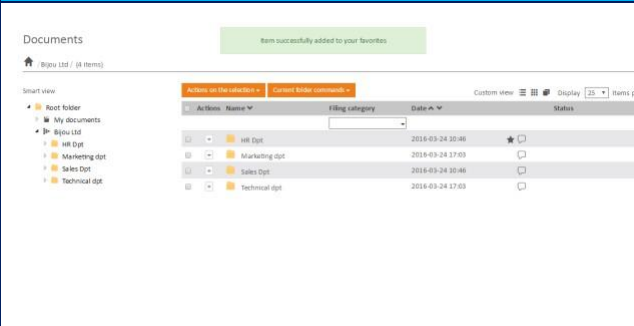
Display

25

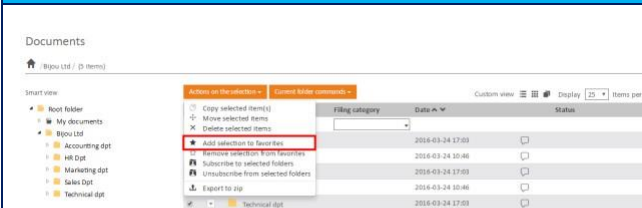
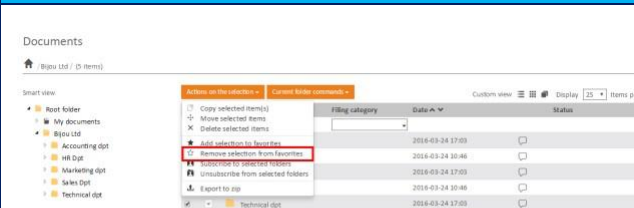
Items per



- A message confirms that the document has been added to favorites. The star icon means that the element is accessible from the favorites.

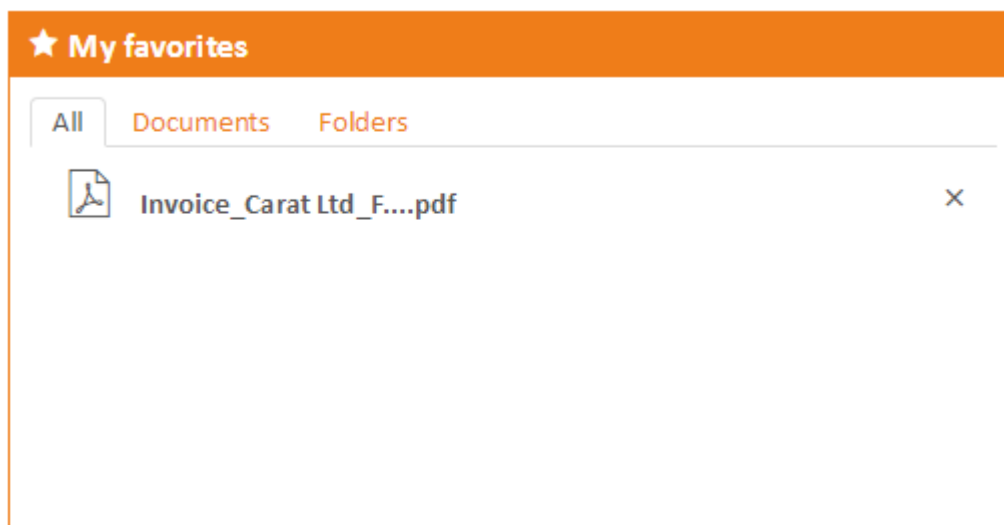
Documents	Folders
	

It is possible to add or remove more documents / folders from the favorites using an action on the selection:

Addition	Removal
	
<p><b>i</b> This operation has no effect on elements already belonging to favorites.</p>	<p><b>i</b> This operation has no effect on elements that do not belong to the favorites.</p>



To check the display of your items in **"My Favorites"**, go to the dashboard and check for items in **"My Favorites"**.



If you want to remove an item from your favorites, simply click on the cross on the right of the window or use the menu **"Remove from my favorites"**

#### Documents

🏠 / Bijou Ltd / Sales Dpt / Customers files / Carat Ltd / Invoices / (1 element)

Smart view

- Root folder
  - My documents
  - Bijou Ltd
    - Accounting dpt
    - HR Dpt
    - Marketing dpt
    - Sales Dpt
      - Customers files
        - Carat Ltd
          - Delivery forms
          - Invoices
          - Purchase orders
          - Quotes
          - Diamond Ltd
          - Platine & son
  - Technical dpt

Actions on the selection

Current folder commands

Custom view Display 25 Items per

Actions	Name	Filing category	Date	Status
	Invoice_Carat Ltd_FA00007	Default	2016-03-31 11:30	★
<div> Audit trail</div> <div> Properties</div> <div> Download</div> <div> Preview</div> <div> Share document</div> <div> Add Link</div> <div> Add a new version</div> <div> Manage versions</div> <div> Copy</div> <div> Move</div> <div> Modify</div> <div> Lock</div> <div> Delete</div> <div> Remove from my favorites</div> <div> Set a reminder</div>				



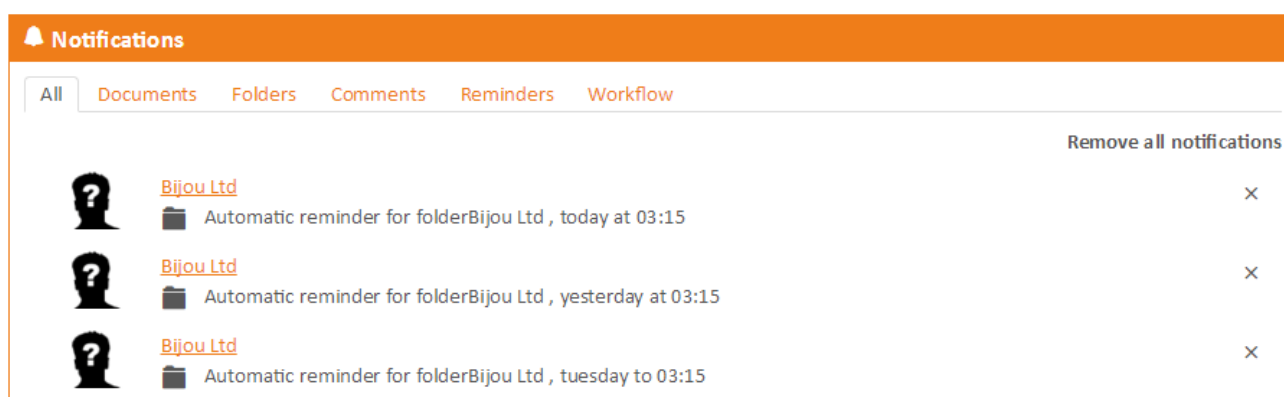


## 3.3.8 Notifications management

### 3.3.8.1 Subscription and notification

The concept of subscription is to automatically notify one or more users that an event has taken place on a chosen document or folder.

Every time these events will occur, users will receive a new notification in the dashboard and a message via email (if enabled in user preferences) to inform them.



### 3.3.8.2 Triggering notifications

The actions that trigger notifications on files and documents are:

- Adding a folder or a document
- Modifying a folder or a document
- Removing a folder or a document
- Moving a folder or a document
- Adding a new version of a document
- Modifying an existing version
- Deleting a document version
- Downloading a document
- Copying a document



### 3.3.8.3 Manage Subscriptions from the folders browsing interface or the search result

#### View subscriptions

An icon allows to identify subscribed folders during the browsing in the folders tree structure.

Actions on the selection

Current folder commands

Custom view

Display


25

Items per page

Actions	Name	Filing category	Date	Supplier name	Invoice number	Invoice date	Amount	Status
Supplier invoices								
<input type="checkbox"/>	<div><div></div><div>Carat Ltd</div></div>		2016-03-24 10:46					<div><div></div><div></div></div>
<input type="checkbox"/>	<div><div></div><div>Diamond Ltd</div></div>		2016-03-24 11:10					<div><div></div><div></div></div>
<input type="checkbox"/>	<div><div></div><div>Platine &amp; son</div></div>		2016-03-24 11:09					<div><div></div><div></div></div>

#### Turn on notifications

You will be then informed by notification in the dashboard and by email (if enabled in the users preferences) of any changes made in the future on the documents located in that folder.

 Open Bee™ Portal

Search

Hello Natasha St Martin  
[User guide](#) | [Video tutorial](#) | [Sign out](#)

Drop a document

Share a document

Dashboard

Documents

Filing

Workflow 6

Hide menu

Documents

(2 items)

Smart view

Root folder

My documents

Bijou Ltd

Actions on the selection



Current folder commands

Custom view

Display

25

Items per page

Actions	Name	Filing category	Date	Status
<input type="checkbox"/>	My documents		2016-03-17 19:10	
<input type="checkbox"/>	Bijou Ltd		2016-03-24 10:45	

History

Share

Add folder

Add document

Import from zip

Copy

Move

Modify this folder

Add to favorites

Turn on notifications

Set a reminder

Export to zip

Subscriptions on folders are recursive .When you subscribe to a folder you also subscribe to all its sub-folders .

#### Turn off notifications



To disable a subscription to a folder, select the folder and select **"Turn off notifications"** from the drop-down menu.

## Add or delete batch subscriptions

You can add or delete subscriptions in batches:

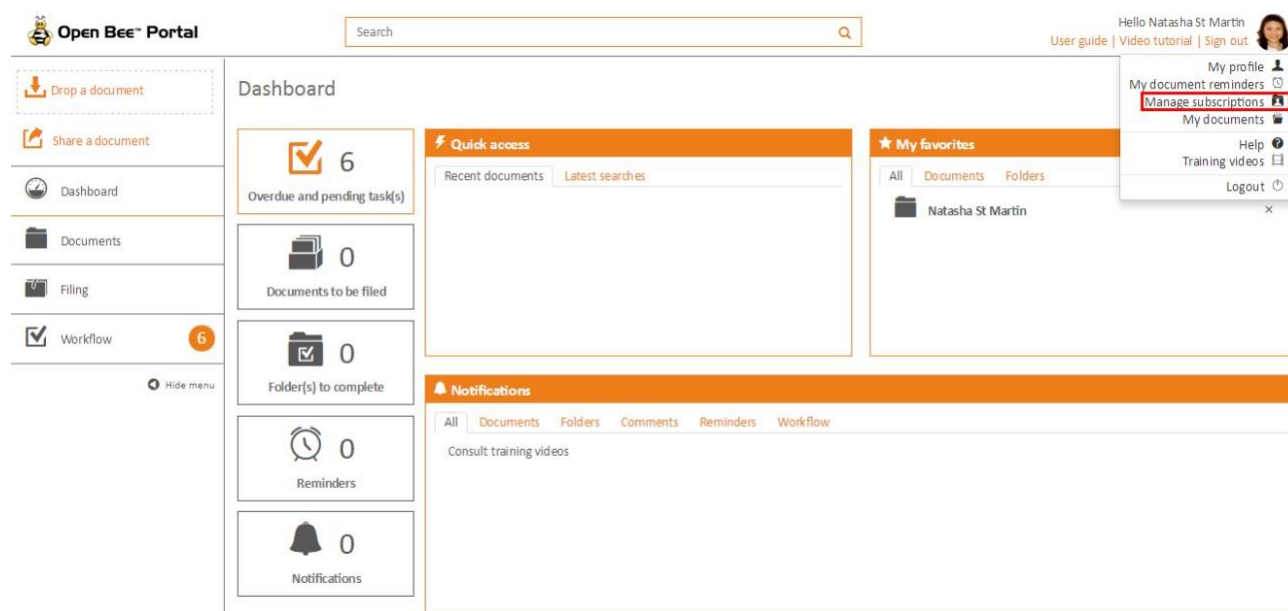
Subscribe to selected folders	Unsubscribe from selected folders
<p><b>i</b> This operation has no effect on:</p> <ul style="list-style-type: none"><li>the documents</li><li>folders to which you have subscribed</li></ul>	<p><b>i</b> This operation has no effect on:</p> <ul style="list-style-type: none"><li>The documents</li><li>folders to which you have not subscribed</li></ul>



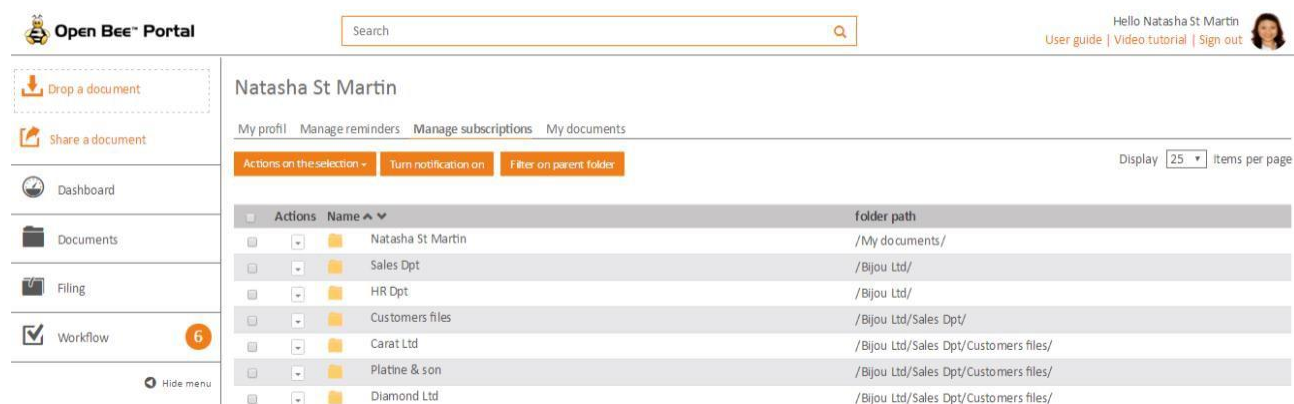
### 3.3.8.4 Manage the subscriptions from the preferences

#### View all the subscriptions

A page allows to view all your subscriptions. Click on your profile photo and select **"Manage subscriptions"** from the drop-down menu.



This page appears:



You can also filter the display to show only the subscriptions of a selected folder and sub-folders, using the button **"Filter on parent folder"**.

#### Delete a subscription



Select the folder, in the Actions menu select "**Unsubscribe from the folder**"

Subscriptions on folders are recursive .When you delete a subscription to a folder, you also delete the subscription to all its sub-folders.

You can delete multiple subscriptions at the same time .For that select multiple folders. Then in the "**Actions**" column click on "**Actions on the selection**" and select "**Unsubscribe from selected folders**".

### Subscribe to a folder

Simply click on "**Turn on notifications** " and select the folder to subscribe in the tree structure.

Subscriptions on folders are recursive .When you subscribe to a folder you also subscribe to all its sub-folders .

## 3.3.9 Reminders on documents and folders

Reminders allow to be notified at a preset date.

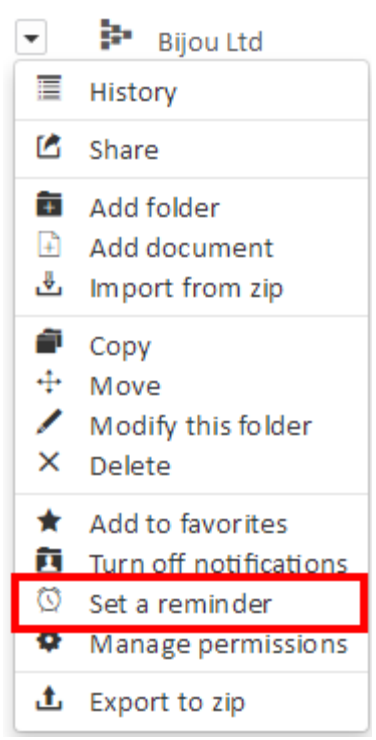
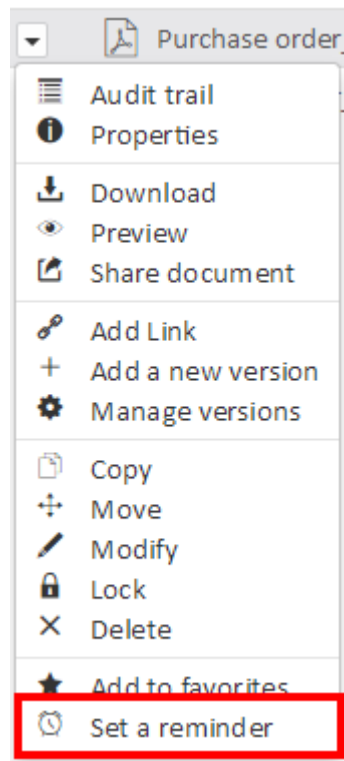
A reminder is associated to a folder or a document. It is an ideal tool for managing subscriptions and recurring contracts or for an automatic renewal.



### 3.3.9.1 Create a reminder

A reminder is created using the menu on the documents or folders.

This menu is accessible in the interface "**Documents**", by choosing the traditional display mode or by list:

Menu on a folder	Menu on a document
	

In both cases, the reminder creation form contains the following fields:

- Reminder date
- Reminder time
- An optional recurrence
- An additional message that will be displayed in the reminder



**Set a reminder**

Date: 2016-03-28

Schedule: 03 15

Recurrence: Every day

Message:

Save

Never  
Every day  
Every week  
Every two weeks  
Every month  
Every year

### 3.3.9.2 Edit or delete a reminder

To edit a reminder, click on your profile picture and select **"My document reminders"** from the drop-down menu.

Open Bee™ Portal

Search

Hello Romain Arpin  
User guide | Video tutorial | Sign out

My profile  
My document reminders  
Manage subscriptions  
My documents  
Help  
Training videos  
Logout

Documents

(2 items)

Smart view

Root folder

- My documents
- Bijou Ltd

Actions on the selection | Current folder commands

Actions	Name	Filing category	Date	Status
	My documents		2016-03-17 19:10	
	Bijou Ltd		2016-03-24 10:45	

A screen allows you then to view all your reminders.

To delete or edit a reminder, simply click on the corresponding icon in the **"Actions"** column.



Romain Arpin

[My profil](#) [Manage reminders](#) [Manage subscriptions](#) [My documents](#)

Actions on the selection ▾

Set a reminder

Display  Items per page

1 reminder

<input type="checkbox"/>	Actions	Reminder date ▴ ▾	Name ▴ ▾	folder path	Message
<input type="checkbox"/>	<div><div>▾</div><div>Edit Delete</div></div>	2016-04-05 03:15	Bijou Ltd	/	

### 3.3.9.3 Reminders notification

When a reminder is activated by Open Bee™ Portal, the user is notified:

- In the dashboard: "Reminders" tile

Notifications

All Documents Folders Comments Reminders Workflow

[Bijou Ltd](#)  
 Automatic reminder for folderBijou Ltd , today at 03:15

[Bijou Ltd](#)  
 Automatic reminder for folderBijou Ltd , yesterday at 03:15

[Bijou Ltd](#)  
 Automatic reminder for folderBijou Ltd , saturday to 03:15

Remove all notifications

- By email, if the user activated the notification function by email in his preferences

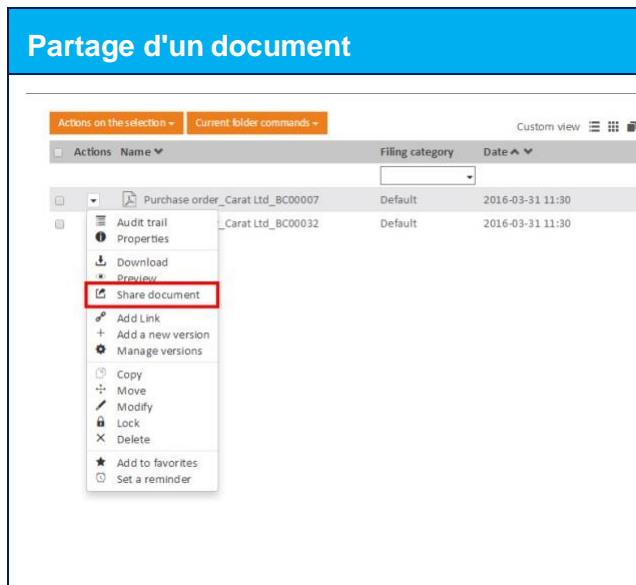




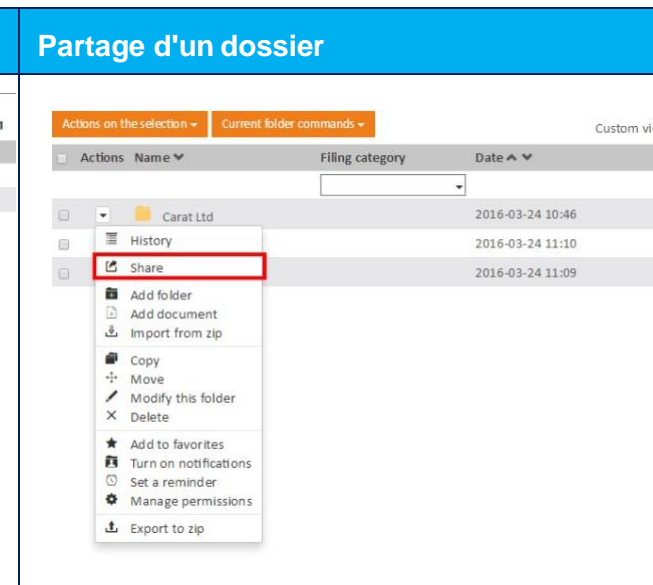
### 3.3.10 Share documents and folders

This feature allows to send an email containing a secured sharing link of a document or a folder to a list of recipients .

#### Partage d'un document

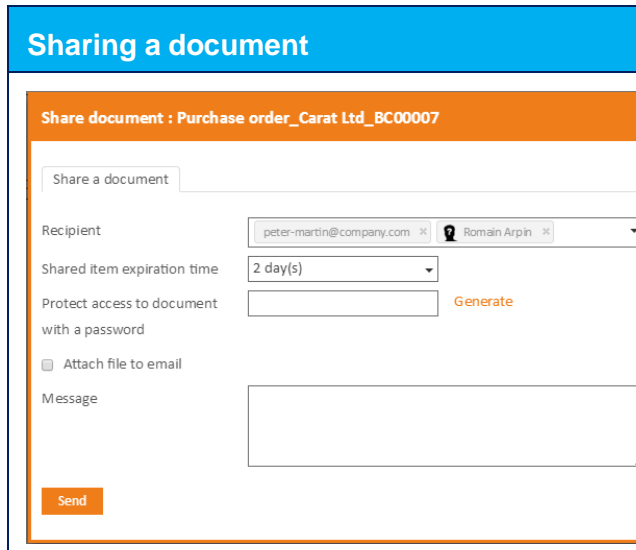


#### Partage d'un dossier

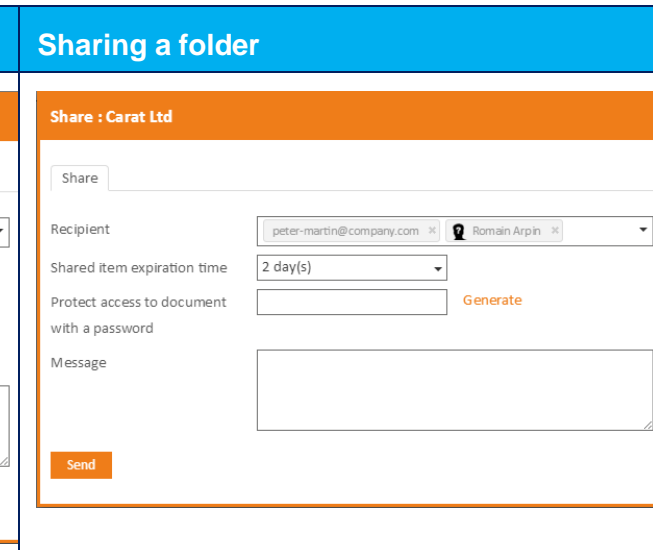


The next window allows to define the parameters of sharing for the document :

#### Sharing a document



#### Sharing a folder




- Recipients :choose one or more contacts from:
  - groups
  - users
  - external contacts by entering their email addresses




- Expiration time: It is possible to revoke the access to the document at the end of a predefined duration
- Password: this password will be required for users to access the shared documents / folders
- Attach the file to the email: check this box to include the document as an attachment to the email. In this case, the "**Expiration time**" and "**Password**" options will not be applicable because the document will be communicated in the form of an attachment rather than in the form of secure Web link.
- Message: the entered text will be added in the sent email

Example of recieved e-mail:

**Email preview**

From:  admin@openbeecloud.com

Date: 2016-04-08 12:43

To:  nstmartin@myopenbee.org

Carbon copy:

Subject: Document en attente de validation dans le workflow *Supplier invoices*

Bonjour Natasha St Martin,

Le document **Invoice\_Flashbay\_5484135489\_04-01-2015** du workflow *Supplier invoices* est en attente de validation .

Send again

- The external contacts can consult the document / folder without a user account via a secure link
- Users of the solution must identify themselves with their user account before consulting the document / folder.

### 3.3.11 Comments on documents and folders

The « **Add comment** » feature, allows to create threads around documents or folders.

This feature was created to provide a virtual space for conversation. Everyone may put comments and information on a document or folder.

Each user can read at any time, the interventions of other colleagues and make his own contribution in the form of a comment.



Adding a comment allows to create a discussion on a document / folder or participate in it.

Adding comments can be made by an administrator or user (if the user has the necessary permissions).

To add a comment

- Click the tool-tip in the "**Status**" column of the concerned file or document,
- Add a comment

## Documents

Home / Bijou Ltd / Sales Dpt / Customers files / Carat Ltd / Purchase orders / (2 items)

Smart view

Actions on the selection Current folder commands Custom view Display 25 Items per page

Actions	Name	Filing category	Date	Status
	Purchase order_Carat Ltd_BC00007	Default	2016-03-31 11:30	
	Purchase order_Carat Ltd_BC00032	Default	2016-03-31 11:30	

Add comment

1

2

- If you want to « **Reply** », « **Modify** » or « **Delete** » your comment, click the links at the bottom of the comment
- Once completed, the tool-tip indicates the number of comments added to the document.

Romain Arpin 2016-04-04 12:19:44  
NEW  
to verify before sending

Reply Modify Delete

Add comment



### 3.3.12 Documents links

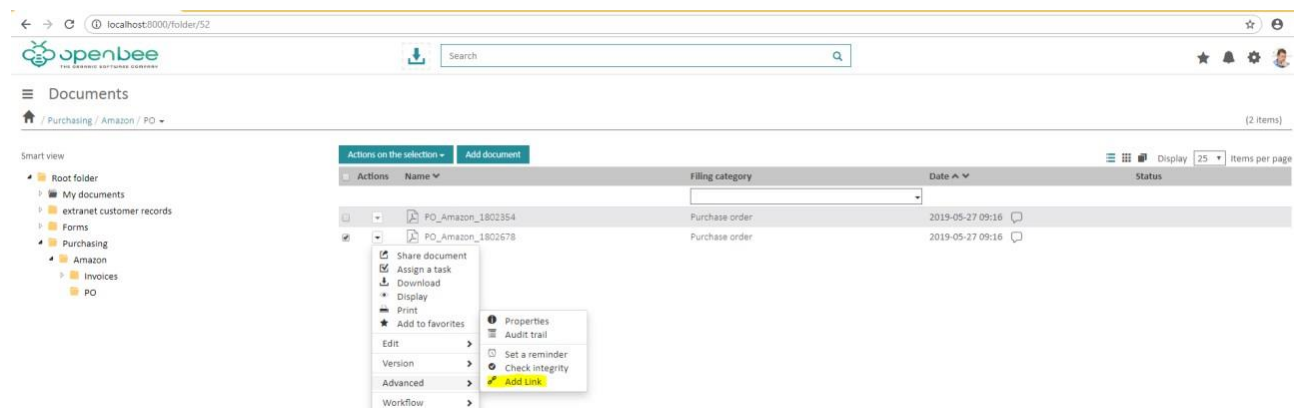
It can be useful to link two or several documents between them, especially if then concern a same subject but are stored in different folders.

The "Link" feature enables to answer to this need.

#### 3.3.12.1 Link documents manually

To add a link :



- Select the document you wish to link to another.
- Select "Add a link" in the context menu





**Ajouter une liaison**

Documents suggérés :


Nom du document	Client	Numéro de BC	Date
<input type="checkbox"/>  Facture_Carat S.a.r.l_FA00007_30_01_11			


Smart view

Recherche de documents

Ajout d'un document

▲ Dossier racine

▸  Mes Documents

▸  Open Bee SARL

Lier

If similar documents are detected, they will be proposed in the Suggested Documents section.

To operate, the automatic document suggestion must be setup by an administrator.

Exemple :

A user wished to link an 100 € invoice from the Open Bee™ company.

If a 100 € purchase order from Open Bee™ company is stored Open Bee™ Portal, it will appear in the suggestes documents section.



**Ajouter une liaison**

Documents suggérés :

Nom du document	Client	Numéro de BC	Date
Facture_Carat S.a.r.l._FA00007_30_01_11			

Smart view

Recherche de documents

Ajout d'un document

▾ Dossier racine

▸ Mes Documents

▸ Open Bee SARL

Lier

The suggested documents can be viewed by clicking on the eye icon on the screen right

To link a document that was not suggested, 3 options are available :



1. Browsing in the folders tree in order to select the documents to which you wish to link your document

**Add Link**

Suggested documents :  
*No suggested item*

**Smart view** Search document Add document

- Root folder
  - My documents
  - extranet customer records
  - Forms
  - Purchasing
    - Amazon**
      - Invoices
        - ☒ Invoice\_Amazon\_3567326\_2015-05-24
        - ☐ Invoice\_Amazon\_3567879\_2015-10-26
      - PO

**Link**

2. Use the documents search, click on the "search documents" tab and select the search criteria and then validate

**Add Link**

Suggested documents :  
*No suggested item*

Smart view **Search document** Add document

Document content

Filing category

**Validate**

	Name	File path	Date
	Invoice_Amazon_3567326_2015-05-24	/Purchasing/Amazon/Invoices/Invoice_Amazon_3567326_2015-05-24	2019-05-27 09:17:16

**Link**

3. Add a new document, click on a "Add a document" from which you will find the add document form. The added document will then automatically be linked.



## Add Link

Suggested documents :

*No suggested item*

Smart view

Search document

Add document

- Root folder
  - My documents
  - extranet customer rec
  - Forms
  - Purchasing

File to upload \*

Browse...

Filing category

Default

Document name \*

Advanced settings

Save

Link



The clip icon appears automatically. This indicates that a link was done on this document.

### 3.3.12.2 Batch documents linking

The dynamic link feature enables

- the documents suggestions when linking a document manually (see above)
- the batch documents linking analyzed as similar by the system. In that case, a clip icon with the number of documents "To link" appears on the dashboard. Click on this icon to access to the batch linking screen.

This screen enables to view all the linked documents and documents awaiting to be linked, depending on the rules defined in the dynamic links administration.

- You can add a filter by dynamic link rule
- The action on the selection enables to batch link or unlink documents. Select the documents you wish with the checkboxes.





3. The documents to link are displayed in two statuses : to link or linked, you can add filter on the display depending on this status.
4. A "lonely" document is a document for which the system is expecting a document to link but no document was found. You can use the context menu to add a new document and link it, in the same way described in the manual link described above.
5. A document with one or several documents and with a "to link" status is a document for which the system thinks to have found the linked document. You then only have to check, click on the checkbox and batch link. Or simply click on the "Link" link.
6. A document with one or several documents and with a "linked" status is an already linked document. You can unlink it.

### 3.3.13 Documents and folders history

This history is available from the menu on documents and folders.

The figure illustrates the difference between document and folder views in a file management system. The left panel, titled 'Document', shows a list of documents with columns for Actions, Name, Filing category, Date, and Status. A context menu is open for the 'Audit trail' document, showing options like Download, Preview, Share, Add Link, Copy, Move, Modify, Lock, Delete, Add to favorites, and Set a reminder. The right panel, titled 'Folder', shows a list of folders with similar columns. A context menu is open for the 'Bipw Ltd' folder, showing options like Accounting dpt, HR dpt, Marketing dpt, Sales dpt, Customers files, Root folder, My documents, and various actions like Add folder, Add document, Import from zip, Copy, Move, Modify this folder, Delete, Destroy, Check integrity, Export the inventory, Add to favorites, Turn off notifications, Set a reminder, Manage permissions, and Export to zip.

A window allows to view the various actions performed on the item as well as the date and the user who performed the operation.

Document

Audit trail

Date	User	Actions on the selection
2016-04-01 10:35	Romain Arpin	Document viewed
2016-04-01 10:26	Romain Arpin	Document downloaded
2016-04-01 10:24	Romain Arpin	Document downloaded
2016-03-31 11:30	Romain Arpin	Document added

Folder

Audit trail

Date	User	Actions on the selection
2016-03-25 17:29	Romain Arpin	Moved
2016-03-24 17:03	Romain Arpin	Folder created



### 3.3.14 ZIP export

The ZIP export allows to download documents and folders to a ZIP archive.

- This feature **is not** intended to provide a way to export mass data. Other tools such as [WebDAV](#) connectivity are more suitable for this kind of operation.
- To ensure optimum functioning, the export volume is limited to 10MB.

#### 3.3.14.1 Export a folder

The export is recursive: all sub-folders and documents contained in the folder will be exported.

Documents

🏠 / Bijou Ltd / (5 items)

Smart view

- Root folder
- My documents
- Bijou Ltd
  - Accounting dpt
  - HR Dpt
  - Marketing dpt
  - Sales Dpt
  - Technical dpt
  - Open Bee Ltd

Actions on the selection ▾ Current folder commands ▾ Custom view ▾ Display 25 ▾ Items per page

Actions	Name ▾	Filing category	Date ▲ ▾	Status
📁	Accounting dpt		2016-03-28 12:16	🗨
📄	History		2016-03-24 10:46	🗨
📄	Share		2016-03-24 17:03	🗨
📄	Add folder		2016-03-24 10:46	🗨
📄	Add document		2016-03-24 10:46	🗨
📄	Import from zip		2016-03-24 17:03	🗨

📄

Copy

➦ Move

✏️ Modify this folder

✖ Delete

🗑 Destroy

🔍 Check integrity

📦 Export the inventory

★ Add to favorites

🔔 Turn on notifications

🕒 Set a reminder

⚙ Manage permissions

📦 Export to zip



The ZIP archive is automatically downloaded by your Web browser:

Open Bee™ Portal

Search

Hello Romain Arpin  
User guide | Video tutorial | Sign out

Drop a document

Share a document

Dashboard

Documents

Filing

Workflow

Administration

Hide menu

EN English

HR Dpt.zip

Documents

/ Bijou Ltd / (4 items)

Smart view

Actions on the selection

Current folder commands

Custom view

Display 25 Items per page

Actions	Name	Filing category	Date	Status
	HR Dpt		2016-03-24 10:46	
	Marketing dpt		2016-03-24 17:03	
	Sales Dpt		2016-03-24 10:46	
	Technical dpt		2016-03-24 17:03	

Afficher tous les téléchargements...

### 3.3.14.2 Export a selection

The created ZIP archive will contain all selected documents and folders.

The export is recursive: all sub-folders and documents contained in the selected folders will also be exported.

Open Bee™ Portal

Search

Hello Romain Arpin  
User guide | Video tutorial | Sign out

Drop a document

Share a document

Dashboard

Documents

Filing

Workflow

Administration

Hide menu

EN English

Bijou Ltd.zip

Documents

/ Bijou Ltd / (5 items)

Smart view

Actions on the selection

Current folder commands

Custom view

Display 25 Items per page

Actions	Name	Filing category	Date	Status
Copy selected item(s)				
Move selected items				
Delete selected items				
Add selection to favorites			2016-03-24 17:03	
Remove selection from favorites			2016-03-24 10:46	
Subscribe to selected folders			2016-03-24 17:03	
Unsubscribe from selected folders			2016-03-24 10:46	
Export to zip			2016-03-24 17:03	

Afficher tous les téléchargements...



### 3.3.15 Metadata CSV export

This feature allows to recover, in a CSV file (editable by Excel) information and a set of documents metadata.

#### 3.3.15.1 Metadata export from search results

1. Make a search using a filter on a filing category,
2. Select the documents to be exported and click on **"Export metadata of the selected documents(CSV)"**
3. A CSV file is downloaded by your browser

The screenshot shows the 'Recherche' (Search) interface with 8 elements. The left sidebar contains filters for document name, description, and content. The main area displays a list of documents with columns for 'Chemin' and 'Date'. A red box highlights the 'Exporter les métadonnées des documents sélectionnés (CSV)' option under 'Actions sur la sélection'. A red arrow points to the 'Règle de classement' dropdown menu, which is set to 'Bon de Commande'. Another red arrow points to the 'metadatas.csv' file download link at the bottom of the page.

Open the file to edit it in Excel:

Extension	Nom	Chemin	Date	Règle de classement	Client	Numéro de BC	Date
pdf	Bon de Commande_Grenat pour toi_BC00006_10_01_11	/Open Bee SARL/COMM	25/03/2014 09:23	Bon de Commande	Grenat pour toi	BC00006	10/01/2011
pdf	Bon de Commande_Platine & fils_BC00010_23_01_11	/Open Bee SARL/COMM	25/03/2014 09:23	Bon de Commande	Platine & fils	BC00010	23/01/2011
pdf	Bon de Commande_La Topaze Lyonnaise_BC00014_04_01_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	La Topaze Lyonnaise	BC00014	04/01/2011
pdf	Bon de Commande_Perles parisiennes_BC00016_01_02_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	Perles parisiennes	BC00016	01/02/2011
pdf	Bon de Commande_Horlogerie Ceram_BC00019_16_01_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	Horlogerie Ceram	BC00019	16/01/2011
pdf	Bon de Commande_Directy Sarl_BC00020_20_01_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	Directy Sarl	BC00020	20/01/2011
pdf	Bon de Commande_Opale_BC00022_12_01_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	Opale	BC00022	12/01/2011
pdf	Bon de Commande_Deutschland's Bijoux_BC00031_05_03_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	Deutschland's Bijoux	BC00031	05/03/2011



If the search isn't carried out to a filing category, the export will not be available.



### 3.3.15.2 Metadata export from a folder

Select a filing category:

Export metadata from the menu on the folder or the "Actions on the selection" menu:

Sur une sélection	Sur tout le dossier

The CSV file is automatically downloaded by your Web browser and edited in Excel.

A	B	C	D	E	F	G	H	I
1	Extension	Nom	Chemin	Date	Règle de classement	Client	Numéro de BC	Date
2	pdf	Bon de Commande_Grenat pour toi_BC00006_10_01_11	/Open Bee SARL/COMM	25/03/2014 09:23	Bon de Commande	Grenat pour toi	BC00006	10/01/2011
3	pdf	Bon de Commande_Platine & fils_BC00010_23_01_11	/Open Bee SARL/COMM	25/03/2014 09:23	Bon de Commande	Platine & fils	BC00010	23/01/2011
4	pdf	Bon de Commande_La Topaze Lyonnaise_BC00014_04_01_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	La Topaze Lyonnaise	BC00014	04/01/2011
5	pdf	Bon de Commande_Perles parisiennes_BC00016_01_02_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	Perles parisiennes	BC00016	01/02/2011
6	pdf	Bon de Commande_Horlogerie Ceram_BC00019_16_01_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	Horlogerie Ceram	BC00019	16/01/2011
7	pdf	Bon de Commande_Directy Sarl_BC00020_20_01_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	Directy Sarl	BC00020	20/01/2011
8	pdf	Bon de Commande_Opale_BC00022_12_01_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	Opale	BC00022	12/01/2011
9	pdf	Bon de Commande_Deutschland's Bijoux_BC00031_05_03_11	/Open Bee SARL/COMM	25/03/2014 09:24	Bon de Commande	Deutschland's Bijoux	BC00031	05/03/2011
10								
11								
12								
13								



### 3.3.16 User folder

A **"My Documents"** folder is automatically created in Open Bee™ Portal. It contains a personal folder for each user of Open Bee™ Portal.

**Only the user** has access to his personal folder. Other users therefore have no access to his folder. The administrator can also access this folder.

**Seen from a user account**, this one has only access to his folder:

Documents

🏠 (3 éléments)

Smart view

Actions sur la sélection Actions sur le dossier courant

Afficher par [grid icon] [list icon] [table icon] Voir [25] éléments par page

📁 Dossier racine

- 🔒 Secure zone
- 📁 Natasha St Martin
- 📁 Open Bee SARL
- 📁 Carat S.a.r.l

Actions	Nom	Règle de classement	Date	Statut
<input type="checkbox"/>	Secure zone		14/03/2014 15:12:32	
<input type="checkbox"/>	Carat S.a.r.l		16/04/2015 16:20:15	★
<input type="checkbox"/>	Open Bee SARL		09/02/2015 17:02:48	

**Seen from an administrator account**, this one has access to all users' personal folders and sub-folders :

Documents

🏠 / My documents / (7 items)

Smart view

Actions on the selection Current folder commands

Custom view [grid icon] [list icon] [table icon] Display [25] Items per page

📁 Root folder

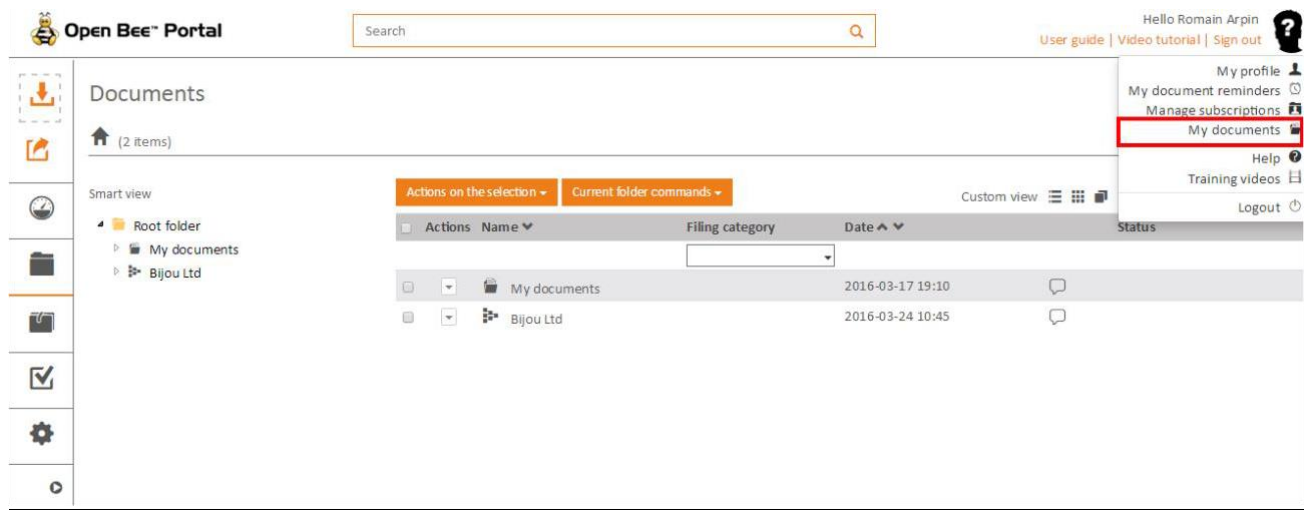
- 📁 My documents
  - 📁 Andrew Smith
  - 📁 John Dumond
  - 📁 Natasha St Martin
  - 📁 Patricia Durand
  - 📁 Peter Martin
  - 📁 Romain Arpin
  - 📁 Sandra Dujardin
- 📁 Bijou Ltd
  - 📁 Accounting dpt
  - 📁 HR Dpt
  - 📁 Marketing dpt
  - 📁 Sales Dpt
  - 📁 Technical dpt

Actions	Name	Filing category	Date	Status
<input type="checkbox"/>	Andrew Smith		2016-03-24 16:57	
<input type="checkbox"/>	John Dumond		2016-03-24 16:57	
<input type="checkbox"/>	Natasha St Martin		2016-03-24 16:57	
<input type="checkbox"/>	Patricia Durand		2016-03-24 16:57	
<input type="checkbox"/>	Peter Martin		2016-03-24 16:57	
<input type="checkbox"/>	Romain Arpin		2016-03-17 19:10	★
<input type="checkbox"/>	Sandra Dujardin		2016-03-24 16:57	

✓ The administrator can change this setting in [permission management on folder](#)



**i** The user folder is also available from the user menu



### 3.3.17 Acces via the WebDav protocol

Open Bee™ Portal is compatible with the **WebDAV** protocol.

#### 3.3.17.1 The WebDav tool configuration

**Example:** *CarotDAV* allows managing its files to various cloud services in addition to the uploading and downloading.

**Downloading:** [http://rei.to/carotdav\\_en.html#download](http://rei.to/carotdav_en.html#download)

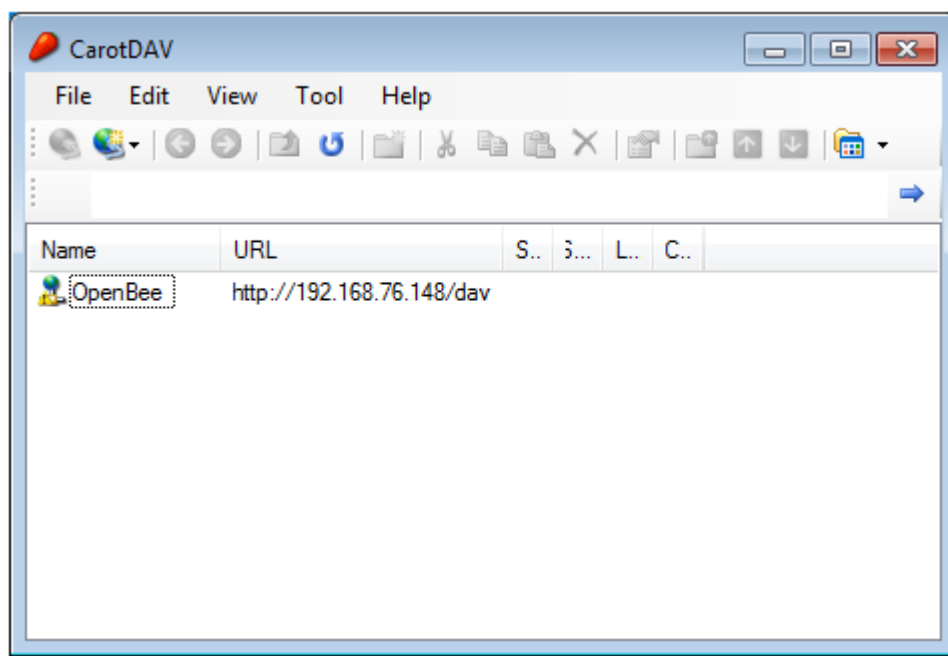
Start the application and create a new WebDav connection

In the configuration fields, enter the parameters of your Open Bee™ Portal





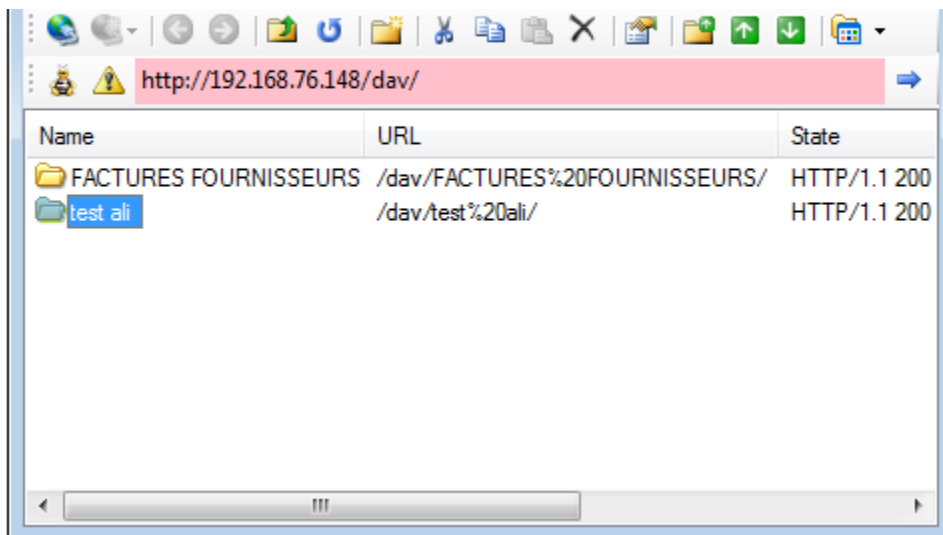
Thereby the connection is created



Double-clicking allows you to list your Open Bee™ Portal directories.

Browse in the tree structure, until reaching the required folder.

Slide in the destination directory (or just on the desktop)



A





### 3.3.18 Microsoft Office documents edition

This feature allows you to edit an Office document located in Open Bee™ Portal from your workstation.

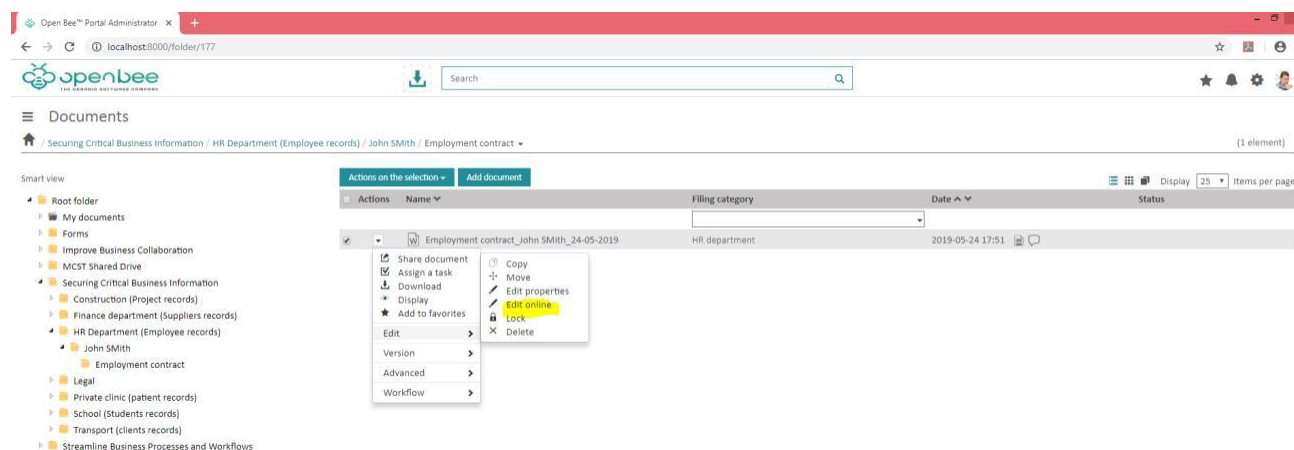
#### 3.3.18.1 Prerequisites

One of the following versions of Microsoft Office must be installed on your workstation.

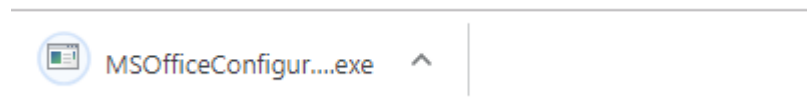
- Microsoft Office Enterprise 2007
- Microsoft Office Standard 2010
- Microsoft Office Professional 2010
- Microsoft Office Professional Plus 2010
- Microsoft Office Professional 2013
- Microsoft Office Standard 2013
- Microsoft Office Home and Business 2013
- Microsoft Office Home and Student 2013

#### 3.3.18.2 First use: configuration of your workstation

From the menu on the document click "Edit online":



Your browser downloads the utility allowing to configure your workstation.





Execute the utility.

**"Administrator"** Windows rights are necessary to apply the configuration.

```
C:\Users\openbee\Downloads\MSOfficeConfiguration.exe

Checking configuration of MS Office 2010 ...
Checking configuration of MS Office 2013 ...
The operation completed successfully.
The operation completed successfully.

Checking configuration of MS Office 2016 ...

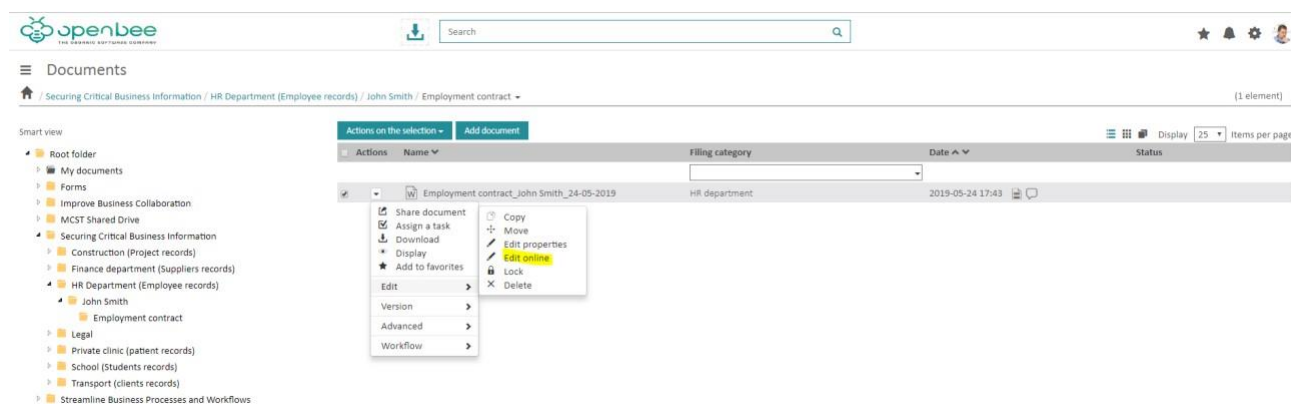
Restarting WebClient service ...
The WebClient service is starting.
The WebClient service was started successfully.

Install OBP Client ...
1 file(s) copied.
Install OBP Protocol ...
The operation completed successfully.
The operation completed successfully.
The operation completed successfully.
The operation completed successfully.
The operation completed successfully.
Done.
Press any key to continue . . .
```

Verify that no error appears. Your workstation is now configured.

### 3.3.18.3 Following uses: document edition with Microsoft Office

From the menu on the document click "Edit online":



Your Internet browser displays a warning. Allow to launch the application and check the box to memorize your choice.



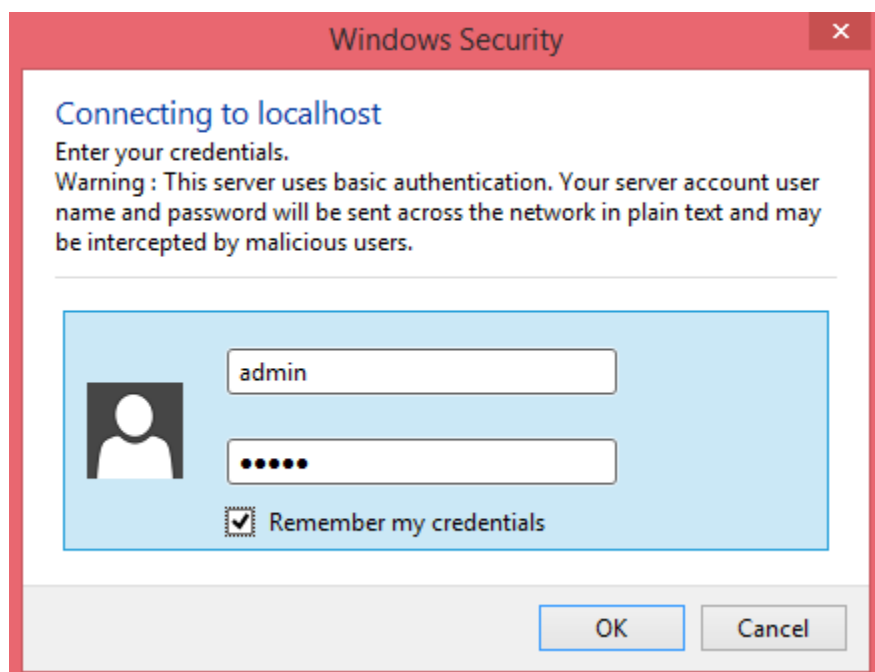
Open client\_obp?

☒ Always open these types of links in the associated app

Open client\_obp

Cancel

Microsoft Office launches and asks you to authenticate. Here, enter your Open Bee™ Portal credentials.



The document opens. By Default Microsoft Office does not allow document edition stored on an Internet space such as Open Bee™ Portal, therefore you have to activate modification manually:



## Open Bee™ Portal 6 - User guide

Open Bee\_Grille de prix Smart Packs (Revendeurs)\_25022013.xlsx [Mode protégé] - Excel

FICHIER ACCUEIL INSERTION MISE EN PAGE FORMULES DONNÉES RÉVISION AFFICHAGE

MODE PROTÉGÉ Attention aux fichiers provenant d'un emplacement Internet, car ils peuvent contenir des virus. Il est recommandé de garder le mode protégé sauf si vous devez effectuer des modifications. [Activer la modification](#)

G53

Référence	Solution	Prix Licence recommandé (HT)	Référence	Options	Prix Licence recommandé (HT)
OB36SPVGPED	<b>Open Bee Smart Pack Workgroup Edition</b> Solution logicielle GED complète pour une sérénité maximale Comprend : - 1 licence Open Bee Portal (Gestion Electronique de Documents - nombre d'utilisateurs illimité) - 1 licence Open Bee Scan pour 1 poste (solution de classement de documents électroniques) - 1 licence Open Bee Scan OCR Pro (agent de conversion) - 1 licence Open Bee Scan Word (agent de conversion) - 1 licence Open Bee Scan PDF/A (agent de conversion) - 1 licence Open Bee Scan Windows Agent Folder (classement dans une arborescence Windows) - 10 licences Open Bee Doc Office Manager (classement à partir d'applications Microsoft Office) - 3 ans de maintenance logicielle et support technique (2 heures par téléphone / télémaintenance / an)		OB36ERPMAN01	1 Licence du module ERP Manager pour Open Bee Portal + 3 Ans de contrat de maintenance logicielle	
			OB36SPVIM01	1 Licence du module 'Workflow' pour Open Bee Portal + 3 Ans de contrat de maintenance logicielle	
			OB36SPVLMUP01	1 Licence d'upgrade du module 'Workflow' linéaire vers le module 'Workflow' conditionnel pour Open Bee Portal + 3 an de contrat de maintenance logicielle offert	
			OB36SPVLCM01	1 Licence du module 'Workflow linéaire conditionnel' pour Open Bee Portal + 3 an de contrat de maintenance logicielle offert	
OB36SPPROED	<b>Open Bee Smart Pack Professional Edition</b> Solution GED complète et clés en main (avec serveur et prestation d'installation incluse) Comprend : 1 licence Open Bee Portal (Gestion Electronique de Documents - nombre d'utilisateurs illimité) incluant 1 Licence 'Workflow' Linéaire + 1 Licence Mobilité Smart Access (SmartPhone/Tablet PC) - 5 licences Open Bee Scan pour 5 postes (solution de classement de documents électroniques) - 5 licences Open Bee Scan OCR Pro (agent de conversion) - 5 licences Open Bee Scan Word (agent de conversion) - 5 licences Open Bee Scan PDF/A (agent de conversion) - 5 licences Open Bee Scan Windows Agent Folder (classement dans une arborescence Windows) - 20 licences Open Bee Doc Office Manager (classement à partir d'applications Microsoft Office) - 3 ans de maintenance logicielle et support technique (2 heures par téléphone / télémaintenance / an) 1 serveur IBM, Enterprise, 500 Go - 2 Go RAM, Linux		OB12MSUP01	1 An de contrat de maintenance logicielle supplémentaire	
			OBDEVSP01	1 journée de développement spécifique	
			OB01INST01	1 journée d'installation, formation sur site *	
			OB01AUDIT01	1 journée d'audit sur site + rédaction d'un cahier des charges *	
			PASS003	Pack Assistance (3 heures)	265 €
			OB36SCAN01	1 Licence Open Bee Scan (Poste supplémentaire) + 3 Ans de contrat de maintenance logicielle	490 €

1-SMART PACK Solutions **TARIF** BON DE COMMANDE 2-SaaS INFRASTRUCTURE TARIFICATION BON DE COMMANDE SaaS...

PRÊT 70 %

\*

You can then edit your document. When you click "Save" in Microsoft Office your changes will automatically be transferred to Open Bee™ Portal where a new document version will be created. This operation monitoring is shown in the status bar of Microsoft Office.




## 3.4 Documents search

This feature provides the ability to perform searches on documents and folders.


Starting from any page, you have access to a search engine offering two modes of search on documents, simple search and advanced search.



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### 3.4.1 Simple search

#### 3.4.1.1 Search by typing words







To search for a document, enter one or more words / character strings in the frame and press "Enter" or on  to launch the search.

In this context, you can search for one or more documents based on words in:

- the title
- the content or document body
- document metadata

Once the search done, a page opens, displaying all the documents that match your query.

Actions on the selection ▾				Display 25 ▾ Items per page
Actions	Name ▾	Path	Filing category	
	Carat Ltd	/Bijou Ltd/Sales Dpt/Customers files/Carat Ltd		
	Delivery form_Carat Ltd_BL00007	/Bijou Ltd/Sales Dpt/Customers files/Carat Ltd/Delivery forms/Delivery form_Carat Ltd_BL00007	Default	
	Invoice_Carat Ltd_FA00007	/Bijou Ltd/Sales Dpt/Customers files/Carat Ltd/Invoices/Invoice_Carat Ltd_FA00007	Default	
	Purchase order_Carat Ltd_BC00007	/Bijou Ltd/Sales Dpt/Customers files/Carat Ltd/Purchase orders/Purchase order_Carat Ltd_BC00007	Default	
	Purchase order_Carat Ltd_BC00032	/Bijou Ltd/Sales Dpt/Customers files/Carat Ltd/Purchase orders/Purchase order_Carat Ltd_BC00032	Default	
	Quote_Carat Ltd_DE00001	/Bijou Ltd/Sales Dpt/Customers files/Carat Ltd/Quotes/Quote_Carat Ltd_DE00001	Default	



### 3.4.1.2 Behavior and search operators

By default the search exactly looks for the word you typed.

- **Operator +**: Default Operator. Whether or not indicated it is always added.
- **Operator -**: Search for documents that do not contain the word xyz. by typing -xyz.
- **Operator \***: Search for word variations by adding an asterisk at the end of the word.
- **Operator "**:
  - single use: If multiple words are entered, the search returns documents containing all the words (not necessarily continuously). To search with continuous words, you can put your phrase in between quotation marks, such as **"French Industry"**
  - multiple use: enclose each search term with " characters allows using the " OR " operator instead of "AND" between the terms. " french" "industry" will therefore return all documents containing" " french" or "industry".

Summary table of possibilities:

Terms	Actions
<b>Industry</b>	All documents containing exactly the word <b>Industry</b>
<b>Industry*</b>	All documents containing a word starting by <b>Indus</b> , such as <b>Industrial</b>
<b>French Industry</b>	All documents containing the word <b>French</b> and the word <b>Industry</b>
<b>+French Industry</b>	
<b>"French Industry"</b>	All documents containing the exact sequence <b>French Industry</b>
<b>"French" "Industry"</b>	All documents containing the word <b>"French"</b> or <b>"Industry"</b>
<b>French -Industry</b>	All documents containing the word <b>Industry</b> and not containing the word <b>French</b>
<b>+French -Industry</b>	
<b>"French" "Industry"</b>	

These rules also apply to the "Content" field of the advanced research



## 3.4.2 Advanced search

### 3.4.2.1 Introduction

#### Filter

☐ Include the folders

#### Creation date

to

#### Modification date

to

#### Created by

☒ All types of document

#### Filing category

#### Workflow

#### Status in the workflow

#### Comment in workflow

Search

The advanced search allows you to search one or more documents by entering one or more search criteria (document name, creation date, document type, ...).


If you run a search using multiple criteria, the search results will only show you the documents that match all search criteria.



### 3.4.2.2 Search by document name

The search engine works with one or more character strings.

It means that in order to find a document, you can enter one or more words (or characters strings contained in the name).

<div><b>Filter</b></div> <div><input type="text" value="BC00007"/></div> <div><input type="text" value="Document description"/></div> <div><input type="text" value="Document content"/></div> <div><input checked="" type="checkbox"/> Include the folders</div> <div><b>Creation date</b> <input type="text"/> to <input type="text"/></div> <div><b>Modification date</b> <input type="text"/> to <input type="text"/></div> <div><b>Created by</b> <input type="text"/></div> <div><input checked="" type="checkbox"/> All types of document</div> <div><b>Filing category</b> <input type="text"/></div> <div><b>Workflow</b> <input type="text"/></div> <div><b>Status in the workflow</b> <input type="text" value="All"/></div> <div><b>Comment in workflow</b> <input type="text"/></div> <div><input type="button" value="Search"/></div>	<p>For example with « <b>BC00007</b> » we find the following document:</p> <div> Purchase order_Carat Ltd_BC00007 /Open Bee Ltd/Sales Department/</div> <p>There is one document that contains the characters string « <b>BC00007</b> » in its name</p>
---	--





Edit document properties	
Name	<input type="text" value="Purchase order_Carat Ltd_BC00007"/>
Description	<input type="text" value="Purchase order_Carat Ltd_BC00007"/>
Filing category	<input type="text" value="Default"/>
<input type="button" value="Save"/>	

To find the document on the left, you can enter the following strings in the "Name" field:

- Purchase order
- BC00007
- BC00007 CARAT

With «[purchase](#)» we find the following documents:

### Search

(4 items)

**Filter**

☐ Include the folders

**Creation date**  
 to

**Modification date**  
 to

**Created by**

☒ All types of document

**Filing category**

**Workflow**

**Status in the workflow**

**Comment in workflow**

Actions	Name	Path
	Purchase order_Carat Ltd_BC00007	/Bjou Ltd/Sales Opt/Customers files/Carat Ltd/Purchase orders/Purchase order_Carat Ltd_BC00007
	Purchase order_Carat Ltd_BC00032	/Customers files/Bjou Ltd/Purchase orders/Purchase order_Carat Ltd_BC00032
	Purchase order_Diamond Ltd_BC00028	/Bjou Ltd/Sales Opt/Customers files/Diamond Ltd/Purchase orders/Purchase order_Diamond Ltd_BC00028
	Purchase order_Platine & son_BC00010	/Bjou Ltd/Sales Opt/Customers files/Platine & son/Purchase orders/Purchase order_Platine & son_BC00010

There are 4 documents whose names contain the character string «[purchase](#)».



### 3.4.2.3 Search by the document description

The search engine works with one or more characters strings.

Edit document properties	
Name	<input type="text" value="Carat S.a.r.l_Purchase order_12-01-2015"/>
Description	<input type="text"/>
Filing category	<input type="text" value="Customer records"/>
customer name *	<input type="text" value="abc Carat S.a.r.l"/>
reference	<input type="text" value="abc BC00007"/>
date	<input type="text" value="2015-01-12"/>
document title *	<input type="text" value="abc Purchase order"/>
<input type="button" value="Save"/>	

To find the document on the left, you can enter the following strings in the "Description" field:

- Order
- Order Carat
- Purchase order



Search

(2 items)

Filing category

Less criteria

Filter

Document description

purchase order carat

☒ Include the folders

Creation date

to

Modification date

to

Created by

☒ All types of document

Workflow

Status in the workflow

All

Comment in workflow

Recherche par Lot

Search for documents with the name or a metadatas match to the values entered (one per line). When using this field, other search criterias are ignored.

Search

Add to favorites

Actions on results

Display 25 Items per page

Actions	Name	Filing category	Path	Modified on	Status	SCORE
<div></div>	<div>Carat S.a.r.l_Purchase order_04-03-2015</div>	Customer records	/extranet customer records/Carat S.a.r.l/Purchase order/Carat S.a.r.l_Purchase order_04-03-2015	2019-05-27 09:33	<div></div>	2.77
<div></div>	<div>Carat S.a.r.l_Purchase order_12-01-2015</div>	Customer records	/extranet customer records/Carat S.a.r.l/Purchase order/Carat S.a.r.l_Purchase order_12-01-2015	2019-05-27 09:32	<div></div>	2.68

### 3.4.2.4 Search by document content


The search by document content allows, like the simple search, to search several words or characters strings in filed documents content.

**Example :** Search for a document that contains the word "Nantes" and the reference "df152".

In this case you must enter both information in this field (see the image below).



## Search

 (0 element)

### Filter

☐ Include the folders

### Creation date

 to 

### Modification date

 to 

### Created by

☒ All types of document

### Filing category

### Workflow


### Status in the workflow

### Comment in workflow

Search

Actions on the selection ▾

Display  Items per page

<input type="checkbox"/>	Actions	Name ▾	Path	Filing category
<input type="checkbox"/>		Purchase order_Carat Ltd_BC00007	/Bijou Ltd/Sales Dpt/Customers files/Carat Ltd/Purchase orders/Purchase order_Carat Ltd_BC00007	Default



Document preview : Purchase order\_Carat Ltd\_BC00007

Page: 1 of 1 Automatic Zoom

Bijou SA  
Bijouterie - Joaillerie  
70, rue des Orfèvres  
BP 312  
75009 Paris

Numéro	Date	N°télécopie client	Carat Ltd Yves Debanne 144, route de Vannes BP 14 44000 NANTES
BC00007	12/01/15	02 40 48 67 90	
Référence	N°intracommunautaire client		
df152	FR373087844356		

### Purchase order

Date de livraison	Adresse de livraison
mardi 10 février 2015	Carat S.a.r.l 144, route de Vannes BP 14 44000 NANTES



### 3.4.2.5 Search by creation date

The search by "Creation date" allows to find documents using their creation date.

You can select a creation period from the calendar.

Filter

Document name

Document description

Document content

☐ Include the folders

Creation date

2016-01-04

to

2016-01-18

« January 2016 »

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Today

Comment in workflow

Search

**Example** : from 4th to 18th of January 2016  
(see image on left)

the application will display all documents created  
between January 4th, 2016 at 0:00 and January 18th, 2016 at 23:59.



### 3.4.2.6 Search by modification date

The search by "Modification date" allows to find documents using their modification date.

You can select the modification period using calendars.

**Filter**

☐ Include the folders

**Creation date**  
 to

**Modification date**  
 to 

« February 2016 »

Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	1	2	3	4	5
6	7	8	9	10	11	12

Today

**Example** :choice of 8th February 2016 to 8th February, 2016

(See image on left) the application will display all modified documents on the 8th February, 2016.



### 3.4.2.7 Search by creator

This search will find one or more documents created by one person.

#### Filter

☐ Include the folders

#### Creation date

 to 

#### Modification date

 to 

#### Created by



Romain Arpin

r.arpin@openbee.com



arthur

openbee@openbee.com

#### Workflow

#### Status in the workflow

#### Comment in workflow

Search





### 3.4.2.8 Search by type

The search can be limited to one or more types of documents.

You can choose between these different types:

- Office documents
- PDF Documents
- Image documents

Selecting "All types of document" show all documents without restriction.

**Filter**

☐ Include the folders

**Creation date**

to

**Modification date**

to

**Created by**

☐ All types of document  
☐ Office documents  
☐ PDF documents  
☐ Image documents

**Filing category**

**Workflow**

**Status in the workflow**

**Comment in workflow**



### 3.4.2.9 Search by filing category

Search by filing category allows you to perform a search on the documents' metadata value (previously filled in with Open Bee™ Scan or Open Bee™ Doc Office Manager or other)

**Filtrer**

Nom du document

Description du document

Contenu du document

☐ Inclure les dossiers

**Date de création**

à

**Date de modification**

à

**Créateur**

☒ Tout les types de documents

**Règle de classement**

Bon de Commande

**Client**

Carat S.a.r.l.

Carat S.a.r.l.

Ciselure

Cleen Bijoux

Cristaux liquides

Deutschland's Bijoux

Diamant Vert

Directy Sarl

Grenat pour toi

Horlogerie Ceram

La Topaze Lyonnaise

Opale

Perles parisiennes

Platine & fils

It is also possible to do a search on a value range.

Example :All amounts from 1000 to 2000. This type of search is very useful on numeric metadata, but may be unreliable on metadata containing character strings.

Depending on the needs you can search with one or more document type fields.

If you search by multiple criteria the search results will only display the documents that match all entered search criteria.



### 3.4.2.10 Search by workflow status

This search option brings out documents that have been processed through a workflow before being filed.

**Filter**

Document name

Document description

Document content

☐ Include the folders

**Creation date**

to

**Modification date**

to

**Created by**

☒ All types of document

**Filing category**

**Workflow**

**Status in the workflow**

All

All

Pending

Approved

Rejected

It is therefore possible to search "Rejected", "Approved" or "Pending" documents in a workflow.



#### 3.4.2.11 Search by workflow

This field allows you to search only the documents that have been processed by a workflow before being filed.

### 3.4.3 Actions and browsing in search results

#### 3.4.3.1 Actions

The available actions on documents and folders when browsing, are also available on a search results.

It is possible to sort the folders and documents by their names, by clicking on the arrows in the list header

#### Grouped permissions and actions

The search results can display documents from multiple folders and therefore having different permissions.

During a bulk action on documents with different permissions, only documents for which the user has the necessary permissions will be processed.

#### Example :

The user "John", did a search on "invoice". The documents "Invoice A" and "Invoice B" are returned.

John only has the permissions to delete "Invoice A". When trying to remove the two invoices using a grouped action, only "invoice A" will be deleted.

#### 3.4.3.2 Browsing

When you display a document after a search, it is possible to view the next or previous document from the search without going back to the search results by clicking on the arrows to the right and the left of the screen:



The screenshot displays the Open Bee Portal 6 interface. At the top, there is a search bar and a navigation menu. The main content area shows a document preview titled "Document preview: Carat S.a.r.l. Purchase order\_04-03-2015". The document content includes a header with the company name "Bijou SA" and its address. Below this, there are several data fields organized into a form, including "Number", "Date", "client fax number", "Reference", "client identification number", "Carat S.a.r.l.", "Delivery date", and "delivery address". The document is titled "Purchase order". On the right side, there is a "Document properties" panel showing details such as "Parent folder", "Actions on the document", "Document name", "Status", "Filing category", "Metadata", "customer name", "reference", "date", "document title", "Format - Size", "Description", "Last modification", and "Last consultation".

### 3.5 Filing

Thanks to the filing tab, you can preview and dynamically file your uploaded documents in Open Bee™ Portal. Click on **"Filing"** from the menu on the left of the screen, you will find all your pending documents awaiting for filing.

These are located in the **"Documents to be filed"**. In the column **"Document preview"** you will see a preview of the selected document.

The screenshot displays the Open Bee Portal 6 interface with the "Filing" tab selected. The interface is divided into three main sections: "Documents to be filed", "Document preview", and "Fill in". The "Documents to be filed" section shows a list of documents, including "Purchase o...pdf". The "Document preview" section shows a preview of the selected document, which is a purchase order from "Bijou SA" to "Carat Ltd". The "Fill in" section contains a form for filing the document, including fields for "Filing categories", "Document name", and a "File" button. The "Document preview" section also shows a table with columns for "Reference", "Designation", "Qty", "Conditionnement", "Pu HT", and "Montant HT".

Two filing modes are possible:



These steps imply that a document pending for filing is selected in the "Filing" section

### 3.5.1 Filing a document using the default filing category

In the right part of the **"Filing document"** screen, select the filing category **"Default"**.

Enter the name of the document and click **"File"**

**Fill in**

**Filing categories**

Default

**Document name**

Purchase order\_Carat Ltd\_BC00007

**File**

Select the folder in which you want to file the document.

**File the document**

- Root folder
  - My documents
  - Bijou Ltd**

**File**

When selecting a folder, its sub-folders appear if you click on the small white arrow in front of it.



## File the document

- Root folder
  - My documents
- Bijou Ltd
  - Accounting dpt
  - HR Dpt
  - Marketing dpt
  - Sales Dpt
  - Technical dpt
- Open Bee Ltd

File

Click on the button "File" at the bottom of the page.

Your document is then filed to the location selected earlier:

Open Bee™ Portal

Search

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Drop a document

Share a document

Dashboard

Documents

Filing **1**

Workflow

Administration

Hide menu

### Documents

[Bijou Ltd](#) / [Sales Dpt](#) / [Customers files](#) / [Carat Ltd](#) / Purchase orders / (2 items)

Smart view

Actions on the selection

Current folder commands

Custom view Display 

25

 Items per page

	Actions	Name	Filing category	Date	Status
		Purchase order_Carat Ltd_BC00007	Default	2016-03-31 11:30	
		Purchase order_Carat Ltd_BC00032	Default	2016-03-31 11:30	

Root folder

- My documents
- Bijou Ltd
  - Accounting dpt
  - HR Dpt
  - Marketing dpt
  - Sales Dpt
    - Customers files
      - Carat Ltd
        - Delivery forms
        - Invoices
        - Purchase orders
        - Quotes
      - Diamond Ltd
      - Platine & son



### 3.5.2 Filing a document using a filing category

Select the filing category of your choice.

The screenshot displays the Open Bee Portal interface. On the left is a sidebar menu with options: 'Drop a document', 'Share a document', 'Dashboard', 'Documents', 'Filing' (highlighted with a red circle and a '1' badge), 'Workflow', and 'Administration'. At the top of the main area is a 'Filing' section with a 'Documents to be filed' list containing 'Purchase order\_C...' and a 'Document preview' window showing a 'Purchase order' document. On the right is a 'Fill in' section with a 'Filing categories' dropdown menu. The dropdown is open, showing a list of categories: Default, Healthcare, Home office, Insurance, Legal, Logistic, Non profit organization, Real estate, Retail, and 'Supplier Invoices' (which is highlighted in blue).

Fill in the document metadata that are dynamically displayed based on the filing category selected.





**Fill in**

**Filing categories**  

Supplier invoices

**Supplier name**  

abc

**Invoice number**  

abc

**Invoice date**

**Amount**  

0,1

Your document will be filed in the following folder :  
/My documents/Accounting dpt/Supplier files/Supplier name/Invoices/

Your document will be renamed as :  
Invoice\_Supplier name\_Invoice number\_Invoice date < MM-DD-YYYY>

**File**

Then fill in the supplier name, the invoice number and the amount.

Once all fields are filled in, you will be able to see the path where the document will be stored and the name of the document.



**Fill in**

**Filing categories**  

Supplier invoices

**Supplier name**  

abc

**Invoice number**  

abc

**Invoice date**

**Amount**  

0,1

Your document will be filed in the following folder :  
/My documents/Accounting dpt/Supplier files/Supplier name/Invoices/

Your document will be renamed as :  
Invoice\_Supplier name\_Invoice number\_Invoice date < MM-DD-YYYY>

**File**

Click on the button **"File"**.

A notification tells you that your document has been properly filed.

Your document is then indexed correctly thanks to the filing categories and renamed automatically:



Open Bee™ Portal

Search

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Drop a document

Share a document

Dashboard

Documents

Filing 1

Workflow

Administration

Hide menu

Documents

/ Bijou Ltd / Sales Dpt / Customers files / Carat Ltd / Invoices / (1 element)

Smart view

Actions on the selection Current folder commands

Custom view Display 25 Items per page

Actions	Name	Filing category	Date	Status
	Invoice_Carat Ltd_FA00007	Default	2016-03-31 11:30	★

Root folder

- My documents
- Bijou Ltd
  - Accounting dpt
  - HR Dpt
  - Marketing dpt
  - Sales Dpt
    - Customers files
      - Carat Ltd
        - Delivery forms
        - Invoices
        - Purchase orders
        - Quotes

The document will be filed according to the filing category parameters.  
 For more information, please refer to "Create a filing category".

A document has to be filed in order to be accessible to other users. Any document awaiting filing will not be visible outside of the filing section.

There are multiple ways to add documents in the filing zone:

### 3.5.3 From a PC software (Sync)

**Open Bee™ Sync** is a synchronization tool that allows every collaborator with a Open Bee™ Portal user account to:

**- Automatically send scanned paper documents from his scanning solution to the Open Bee™ Portal filing zone.**

The synchronization tool monitor a specific folder, to which scanning devices will send scanned paper documents. Each time a new file appears, it will automatically be sent to the "Filing" section in Open Bee™ Portal.

**- Synchronize documents from his workstation (on the user's computer) with Open Bee™ Portal.**

The synchronization tool updates your Open Bee™ Portal online, based on documents contained on your workstation and vis-versa. It also compares the files on your workstation with those present in Open Bee™ Portal in order to ensure that you benefit from the latest version of the file you want to work on.



**- Transferring mass documents**

The "drag-and-drop" function in Open Bee™ Sync allows you, in a simple drag and drop, to send one or more documents from your desktop to the Open Bee™ Portal folder tree structure online.

- **Consult the Open Bee™ Sync documentation in order to know more about this tool.**

### 3.5.4 From a WebDav digitization button

Most scanners or printers are compatible with the [WebDav](#) protocol.

Please consult your multi-function documentation in order to create a WebDav digitization button. This will allow you to send a scanned document directly to Open Bee™ Portal.

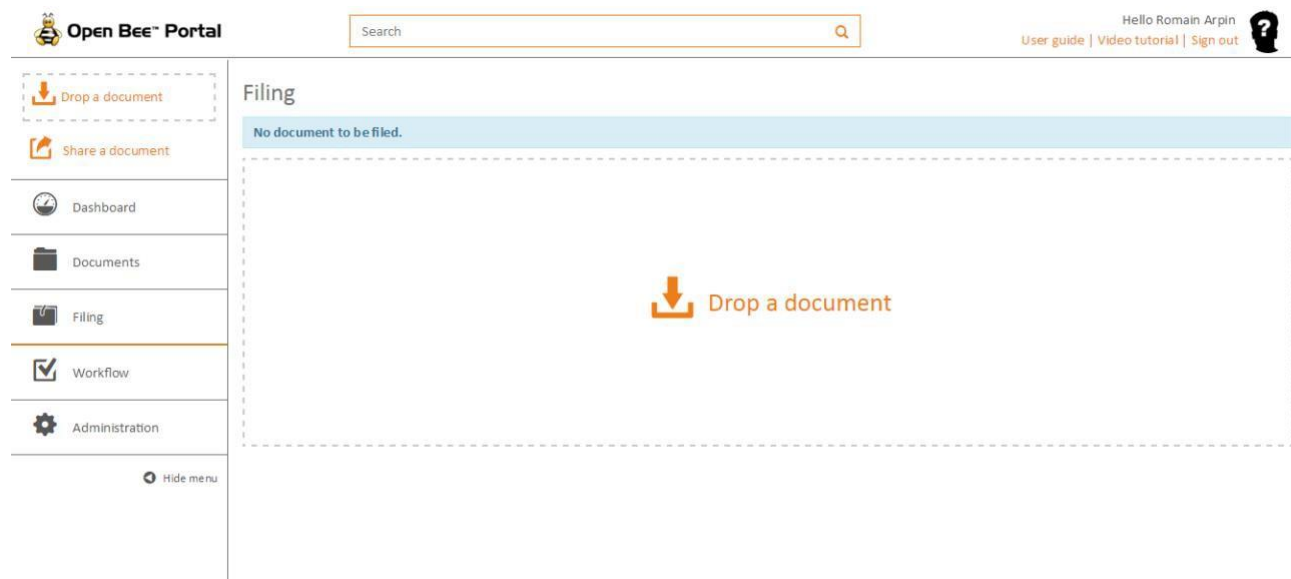
Here are the information you need (assuming that your solution can be accessed at the address <http://localhost:8000/>)

- Webdav server URL : <http://localhost:8000/davq/>
- Login: your Open Bee™ Portal login
- Password: your Open Bee™ Portal password

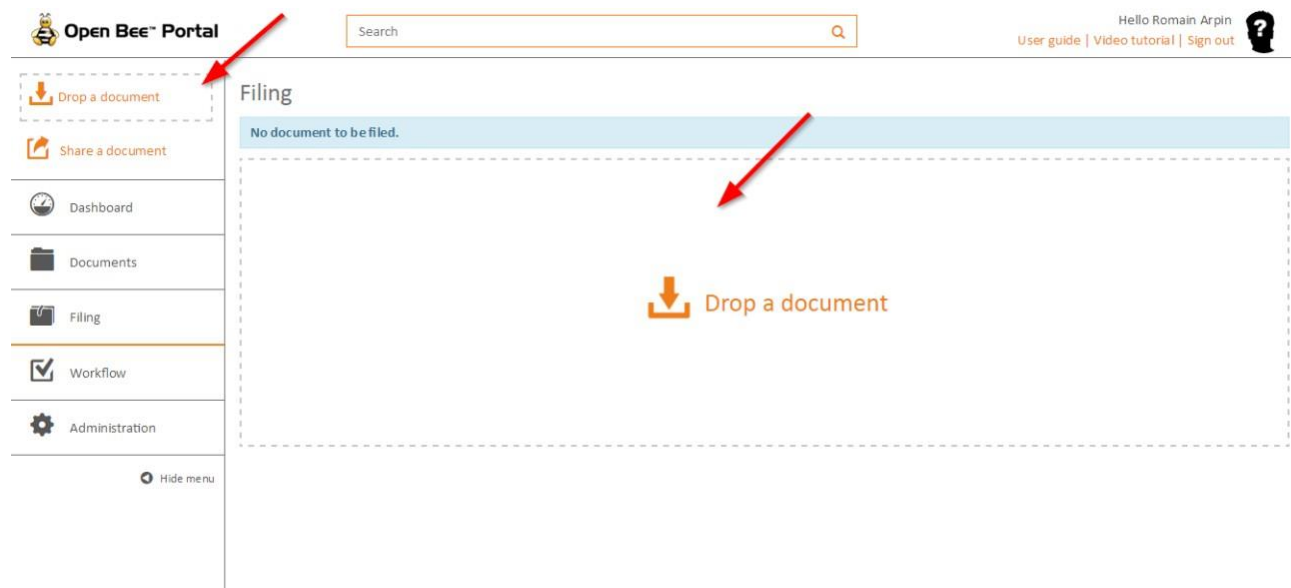
Once transmitted by your printer to Open Bee™ Portal, your document is waiting in the filing zone and may be filed with the Open Bee™ Portal filing categories.



### 3.5.5 From the Web interface with a drag / drop



From the "Filing" tab of the Open Bee™ Portal interface, you can directly file your documents using a drag / drop in the box provided for it.



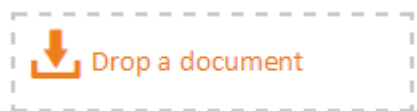
When you drop your files into this area, they appear in the column **"Documents to be filed"**:  
You can see the preview of the selected document in the dedicated area for this purpose.



Select the filing category that you want to use from the **"Fill in"** column  
 You have two options, file it by "Default" or use an advanced filing category.

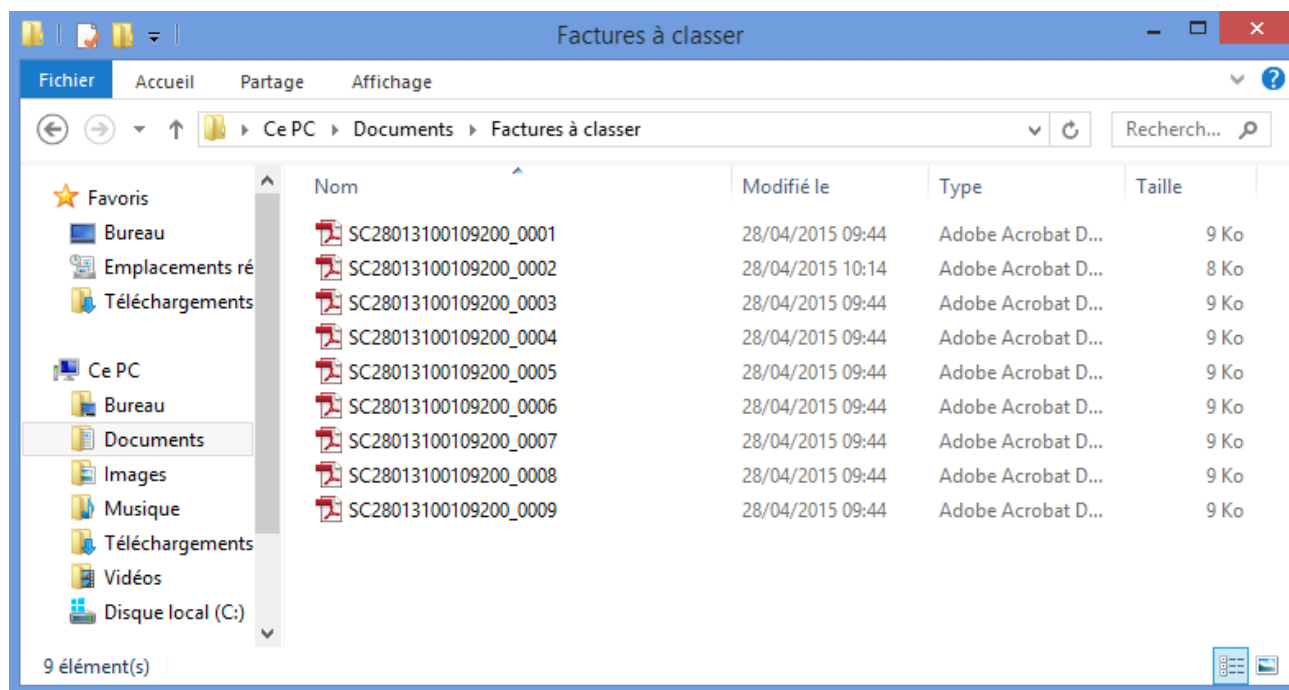
### ✔ Alternative :

You can also directly click on the download area

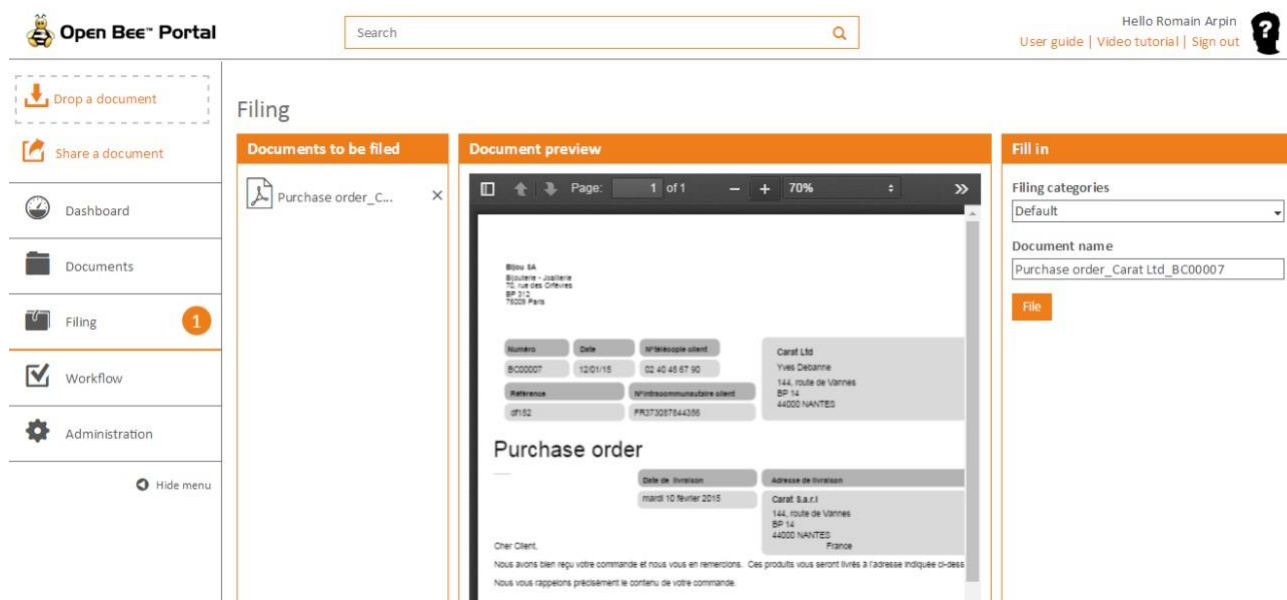




A Windows Explorer window opens:



Select the file(s) and click **"Open"**. The document(s) will appear in the **"Documents to be filed"** column of your DMS interface.



Your documents are therefore ready to be filed. Go to the **"File a document"** section to learn more about the filing categories.



## 3.6 Workflow

### Definition of a workflow

A "**workflow**" consists of an orchestrated and repeatable pattern of business activity enabled by the systematic organization of resources into processes that transform materials, provide services, or process information. It can be depicted as a sequence of operations, declared as work of a person or group, an organization of staff, or one or more simple or complex mechanisms.

From a more abstract or higher-level perspective, "**workflow**" may be considered a view or representation of real work. The flow being described may refer to a document, service or product that is being transferred from one step to another.

**Workflows** may be viewed as one fundamental building block to be combined with other parts of an organization's structure such as information technology, teams, projects and hierarchies.

Source : wikipedia <https://en.wikipedia.org/wiki/Workflow> <http://fr.wikipedia.org/wiki/workflow>

In this definition, an important point for the development of a workflow is noted: **The workflow describes the approval circuit, the tasks between the different process participants, deadlines, validation modes, and provides to each of the participants the necessary information to carry out its task.**

A comprehensive study of one or more business processes is therefore essential before creating a workflow.

Functional workflow automation (e.g.: the superior validation) is generally outcoming from homogenization, rationalization and optimization of communication desire within the company.

#### **When studying a workflow, we must distinguish and highlight:**

- Objects that are part of the business process: paper document, electronic, or other ...
- The different states of objects: created, modified, being validated, validated, ...
- The participants that interact with the workflow: validation, correction ...
- Processing deadlines of a task
- The automated actions



**Suggestions to read:**

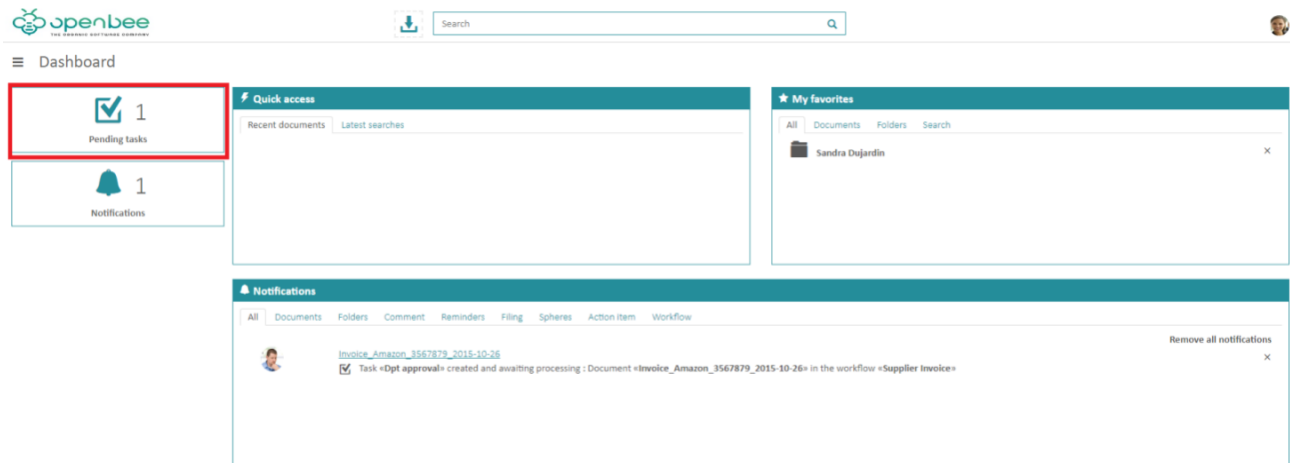
- [Supervision du Workflow](#)
- [Workflow administration](#)

## 3.6.1 Using the Workflow

### 3.6.1.1 Notifications of tasks to be processed

A user is notified of tasks to be processed in a workflow:

- by email
- from the dashboard
- from the "Workflow" menu



Clicking one of these elements will redirect the user on the "**Workflow \ List of tasks**" screen

### 3.6.1.2 List of tasks to be processed

Workflow

Liste des tâches Liste des Workflows





Voit 25 éléments par page

Actions	Statut	Date d'entrée	Echéance	Nom	Tâches	Acteur	Nom du document	Règle de classement	Fournisseur	Numéro de facture	Date de facture	Montant HT	Commentaires
	En attente			Validation factures fournisseurs	All			All					
		17/04/2015 18:54:17	-8 jour(s) 21:41	Validation factures fournisseurs	Réception facture	Natasha St Martin	20110726170156	Facture Fournisseur	KALI	123456	2015-04-28	150	(0)
		17/04/2015 18:55:27	-8 jour(s) 21:40	Validation factures fournisseurs	Réception facture	Natasha St Martin	Facture_IMPO_05/05/2015	Facture Fournisseur	IMPO	1234569775	2015-05-05	95.56	(0)
		17/04/2015 18:55:05	-8 jour(s) 21:40	Validation factures fournisseurs	Réception facture	Natasha St Martin	Facture_IMPO_05/05/2015	Facture Fournisseur	IMPO	1234569775	2015-05-05	95.56	(0)
		17/04/2015 18:55:34	-8 jour(s) 21:40	Validation factures fournisseurs	Réception facture	Natasha St Martin	Facture_Flashbay_01/04/2015	Facture Fournisseur	Flashbay	5484135489	2015-04-01	328	(0)
		17/04/2015 18:55:23	-8 jour(s) 21:40	Validation factures fournisseurs	Réception facture	Natasha St Martin	Facture_IMPO_05/05/2015	Facture Fournisseur	IMPO	1234569775	2015-05-05	95.56	(0)
		17/04/2015 18:56:18	-8 jour(s) 21:39	Validation factures fournisseurs	Réception facture	Natasha St Martin	Facture_KALI_21/04/2015	Facture Fournisseur	KALI	15-109076	2015-04-23	107	(0)
		27/04/2015 16:35:27	23:59	Validation factures fournisseurs	Réception facture	Natasha St Martin	Facture_Flashbay_06/05/2015	Facture Fournisseur	Flashbay	154512458485	2015-05-06	1245	(0)



It is possible to sort all the columns. Some columns also allow a filter to view the tasks assigned to a particular user.

Column description:

- **Status:** "Pending", "Overdue task(s)", "Approved" or "Rejected". By default, the "Pending" and "Overdue tasks" are displayed
- **Entry date:** date the task was assigned
- **Deadline:** remaining time before the task is overdue
- **Name:** the name of the workflow to which the task belongs
- **Tasks:** the task name.  If the connected user is the task participant, he can click on the task to display the detailed view.
- **Participant:** person in charge of the task.
- **Document name:** name of the document having triggered the task.  Click on the document name to open a preview in a pop-up
- **Filing category:** Filing category with which the document that triggered the task was filled.
- **Metadata:** metadata associated to the document. To keep low heights lines, only the first two metadata are displayed.  Click on the arrow to display the other metadata.
- **Comments:** number of comments related to the document.  Click on the number to view comments and add new ones.

By selecting a filter on a filing category or the name of a workflow triggered by a filing category, columns corresponding to the metadata category are added. This allows you to sort the tasks on metadata values.

Administration

Système » Utilisateurs » Documents » Workflow »

Liste des tâches Liste des Workflows

Actions sur la sélection: Valider Annuler

Voir 25 éléments par page

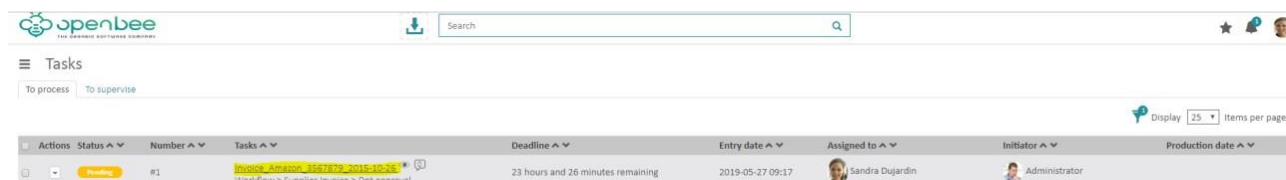
Actions	Statut	Date d'entrée	Echéance	Nom	Tâches	Acteur	Nom du document	Règle de classement	Fournisseur	Nom de facture	Date de facture	Montant HT	Commentaires
	En attente			Validation factures fournisseurs	All			All					
		17/04/2015 18:54:17 23:54		All	Réception facture	Natasha St Martin	20110726170136	Facture Fournisseur	KALI	123456	2015-04-28	190	
		17/04/2015 18:55:27 23:55		Validation factures fournisseurs	Réception facture	Natasha St Martin	Facture_IMPO_05/05/2015	Facture Fournisseur	IMPO	1234569775	2015-05-05	95.56	
		17/04/2015 18:55:05 23:55		Validation factures fournisseurs	Réception facture	Natasha St Martin	Facture_IMPO_05/05/2015	Facture Fournisseur	IMPO	1234569775	2015-05-05	95.56	
		17/04/2015 18:55:54 23:55		Validation factures fournisseurs	Réception facture	Natasha St Martin	Facture_Flashbay_01/04/2015	Facture Fournisseur	Flashbay	5484135489	2015-04-01	328	
		17/04/2015 18:55:23 23:55		Validation factures fournisseurs	Réception facture	Natasha St Martin	Facture_IMPO_05/05/2015	Facture Fournisseur	IMPO	1234569775	2015-05-05	95.56	
		17/04/2015 18:56:18 23:56		Validation factures fournisseurs	Réception facture	Natasha St Martin	Facture_KALI_23/04/2015	Facture Fournisseur	KALI	15-109076	2015-04-23	107	



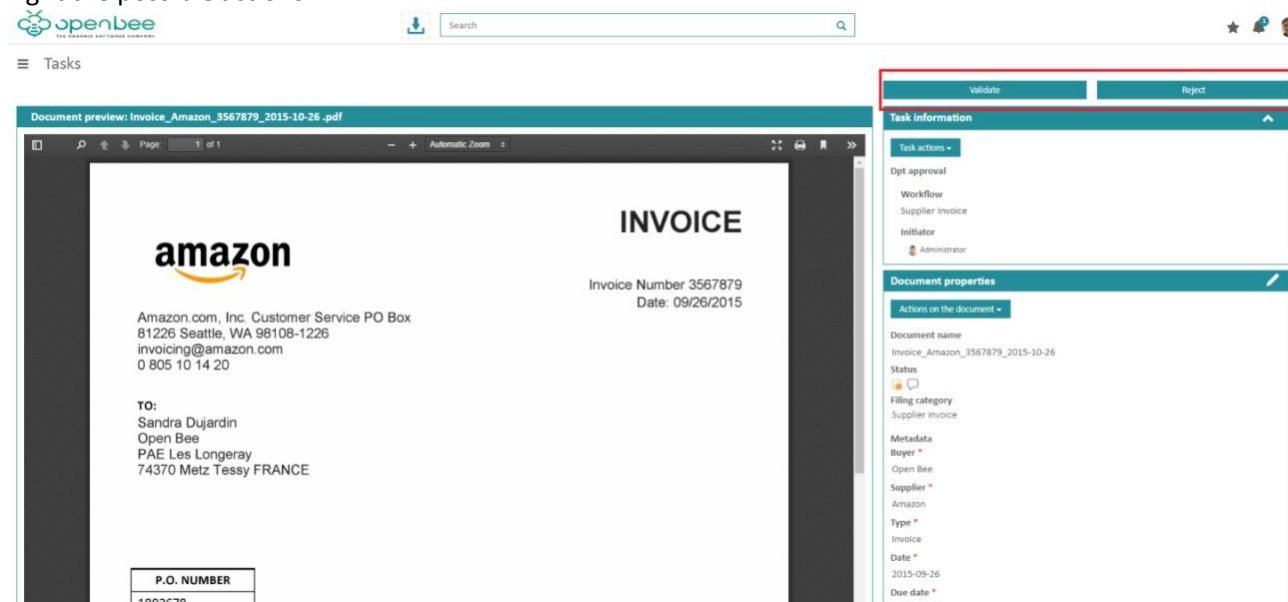
### 3.6.1.3 Tasks processing

#### Unitary serial processing

To carry out the assigned task, the participant can click on the task's name:



A window opens, offering him on the left, a preview of the document concerned by the workflow. On the right the possible actions:



If the administrator, when setting the workflow, selected a group of users for the next task, then the participant must, at this stage, select the next participant among this group of users.



**Choix de la tâche suivante**

Sélectionner la tâche suivante pour le document  
20110726170141

Validation niveau 1 ▼

Claude Dumond

Valider

Depending on how the workflow was [configured by the administrator](#), you may have to choose the next task and / or the next task's participant.

### Processing tasks in chain

After a task approval, the next task will automatically be presented to the user.

### Batch processing

It is possible to "Approve" or "Reject" tasks in batches from the list of tasks:

Workflow

Liste des tâches Liste des Workflows

Valider Rejeter

Voir 25 éléments par page

Actions	Statut	Date d'entrée	Echéance	Nom	Tâches	Acteur	Nom du document	Règle de classement
	En attente			Validation factures fournisseurs				
<input type="checkbox"/>		17/04/2015 18:54:17	-8 jour(s) 21:41	Validation factures fournisseurs	Réception facture		20110726170156	Facture Fournisseur
<input type="checkbox"/>		17/04/2015 18:55:27	-8 jour(s) 21:40	Validation factures fournisseurs	Réception facture		Facture_IMPD_05/05/2015	Facture Fournisseur
<input type="checkbox"/>		17/04/2015 18:55:05	-8 jour(s) 21:40	Validation factures fournisseurs	Réception facture		Facture_IMPD_05/05/2015	Facture Fournisseur
<input type="checkbox"/>		17/04/2015 18:55:54	-8 jour(s) 21:40	Validation factures fournisseurs	Réception facture		Facture_Flashbay_01/04/2015	Facture Fournisseur
<input type="checkbox"/>		17/04/2015 18:55:23	-8 jour(s) 21:40	Validation factures fournisseurs	Réception facture		Facture_IMPD_05/05/2015	Facture Fournisseur
<input type="checkbox"/>		17/04/2015 18:56:18	-8 jour(s) 21:39	Validation factures fournisseurs	Réception facture		Facture_KALI_23/04/2015	Facture Fournisseur
<input type="checkbox"/>		27/04/2015 16:35:27	23:59	Validation factures fournisseurs	Réception facture		Facture_Flashbay_06/05/2015	Facture Fournisseur



### 3.6.1.4 Notify users that a task is done

This feature is available only if the workflow administrator authorized it when [setting up the current task](#).

During the task's validation or rejection, you can choose to send an email notification to a group or a user.

**Notifier des personnes par email**

Vous pouvez sélectionner ici un utilisateur ou un groupe à notifier lorsque vous validez ou refusez ce document

**Administrateur**

**André Dupond**  
adupond@myopenbee.org

### 3.6.1.5 Actions on the document before a task processing

All actions usually available on the document are available from the task's approval screen:

Réception facture

**Actions sur le document**

- Téléchargement
- Prévisualisation
- Envoyer le document
- Historique
- Propriétés
- Gérer les versions
- Ajouter une nouvelle version
- Copier
- Déplacer
- Editer
- Supprimer
- Ajouter une liaison
- Verrouiller
- Ajouter aux favoris
- Ajouter un rappel

726170156.pdf

1 of 1

Automatic Zoom

**FACTURE**  
TVA intracom : FR69504389446  
N° : 115-101678 du 05/05/2011  
OPEN BEE  
FUMEX delphine  
5 avenue du pre félin  
74940 ANNECY LE VIEUX  
France (Métropolitaine)

TVA n° FR31 399 452 473 / APE 7311Z  
www.kalico.com

Mode de Règlement : Carte Bancaire  
Référence de la commande : RF530085

Descriptif	Quantité	Prix unitaire	Montant HT
Impression et livraison de RF XBanner / Impression Recto Seul Format : 80x180 pack Duo M1 Quantité : 4 ex Chromatisme : CMYK	1	199	199

Conforme Ignorer Non-conforme

**Propriétés du document**  
Nom du document  
20110726170156  
Statut  
Métadonnées  
Fournisseur  
KALI  
Numéro de facture  
123456  
Date de facture  
28/04/2015  
Montant HT  
150  
Plus d'infos

**Notifier des personnes par email**  
Vous pouvez sélectionner ici un utilisateur ou un groupe à notifier lorsque vous validez ou refusez ce document



Only actions authorized by the user's permissions on the document are accessible.

In case the task administrator allows it, versions management, management actions and adding versions are available even if the logged in user does not have permission for these actions on the document

### 3.6.2 Status of a document exiting the workflow

Once the last task in the workflow is completed, the document is displayed in the "Documents" tab.

An icon allows to identify that the document went through a workflow.

Add document		Display 25 Items per page	
Actions	Name	Filing category	Date
			Status
	Invoice_Amazon_3567326_2015-05-24	Supplier invoice	2019-05-27 09:17
	Invoice_Amazon_3567879_2015-10-26	Supplier invoice	2019-05-27 09:54



Approved document	Rejected document	Document in process
 The document has been approved in the workflow.	 A participant refused for various reasons to validate his task and the document is rejected from the workflow.	 The document is awaiting processing by a user in the workflow. This state is only available if the the workflow administrator has enabled the preview of documents when being processed in the workflow.

A click on this icon displays the history of actions performed on the document while it is being processed by the workflow engine.

History during an approval:

**Document : Invoice\_Amazon\_3567879\_2015-10-26**

&lt; Workflow : Supplier Invoice

Task	Task status	Assigned to	Comments	Production date
Dpt approval	Approved	 Sandra Dujardin		2019-05-27 09:54
Accounting	Approved	 Alison Jerry		2019-05-27 09:54

History with a rejection:**Document : Invoice\_Amazon\_3567326\_2015-05-24**

&lt; Workflow : Supplier Invoice

Task	Task status	Assigned to	Comments	Production date
CFO approval	Rejected	 Andrew Martin		2019-05-27 09:58

2267

If during the workflow, a participant refused for various reasons to validate his task, the document will then still be filed in the proper folder according to the filing category. Unless the workflow administrator has configured the workflow to move the document to a particular folder during a refusal.

### 3.6.3 Emails sent by the workflow

This page regroups the various cases for which the workflow is going to send an email to one or several user(s).

**How to receive emails**

- These emails will only be sent if the related users checked the box " **Notification by email** " in their preferences



- The SMTP parameters must be correctly configured in the administration.

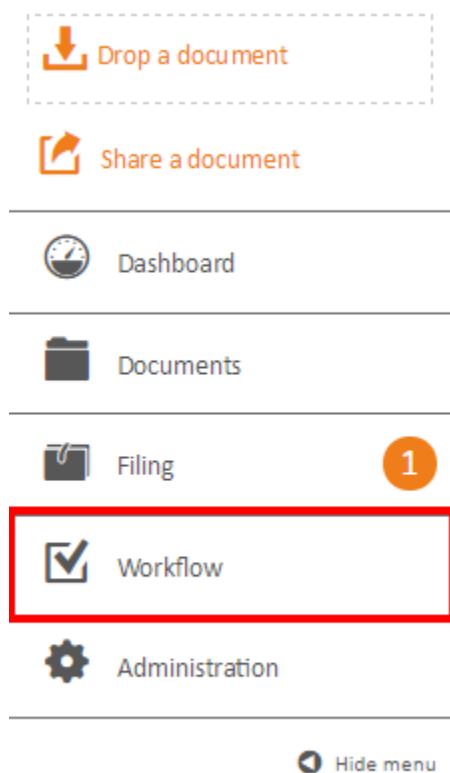
Event	Email recipient
<b>New</b> document pending in a workflow task	User in charge of validating the document
Exiting document from the workflow due to <b>refusal</b>	<ul style="list-style-type: none"><li>• Workflow supervisor</li><li>• User to notify selected in the workflow configuration (Preferences Management)</li></ul>
Exiting document from the workflow due to <b>approval</b>	<ul style="list-style-type: none"><li>• Workflow supervisor</li><li>• User to notify selected in the workflow configuration (Preferences Management)</li></ul>
A <b>user</b> validates a task and chooses a user or a group to notify	The user or group chosen during the task approval.

### 3.6.4 Workflow monitoring

The supervisor is a user with access to workflow monitoring features. He has access to a tab to monitor the workflow and perform various operations on the workflow.

The supervisor is defined by the administrator during the workflow configuration.



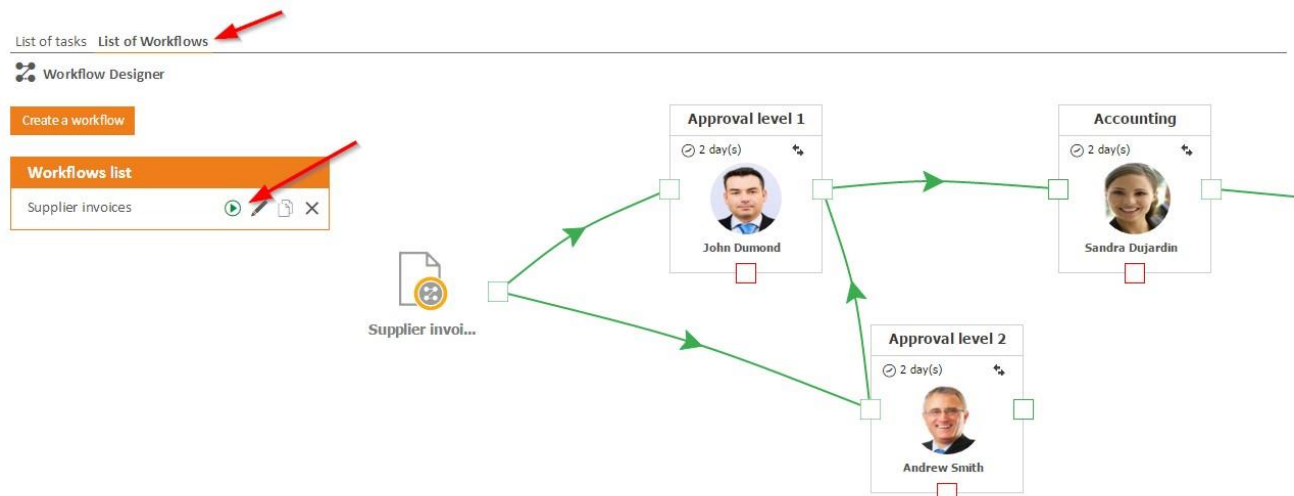


#### Available features for a supervisor:

##### 3.6.4.1 Starting and stopping the workflow

To start processing documents through the created workflow, it is necessary that the workflow supervisor starts the workflow (If it has not already been done by the administrator who created the workflow).

To do this, click on "List of workflows" and click on the green arrow in front of the workflow to be started.



An orange icon indicates that the workflow is started.



Clicking on this same icon then allows to stop / pause the Workflow.

When stopping a workflow, a message appears offering to associate or not the documents at the next restart of this Workflow.

The documents submitted to the workflow while it's stopped can either:

- be put in a waiting list and be processed when restarting the workflow
- never be processed



**During the pause of the workflow, do you want to:**

- ☐ **Continue associating new incoming documents with this workflow**  
(new incoming documents during the paused workflow will be dealt with when it is restarted)
- ☐ **Stop associating new incoming documents with this workflow**  
(new incoming documents during the paused workflow will not be dealt with when it is restarted)

Validate

You have the ability to pause or stop the workflow at anytime.

Pending documents in the workflow can be processed by the users, but no new documents will be added to the workflow.

A workflow's stopping and restarting functions are also accessible from the workflow management interface.

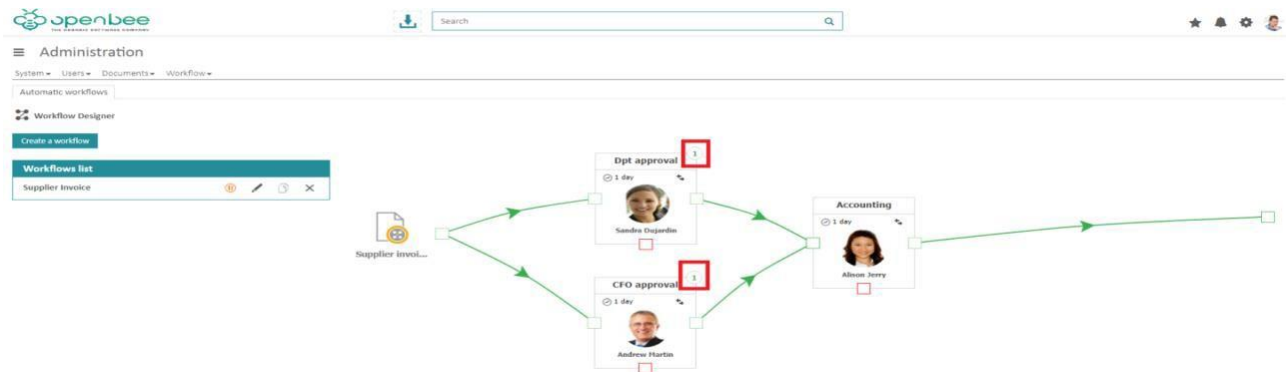


### 3.6.4.2 Tasks tracking

#### List of workflows

Click on the "**Workflow \ List of Workflows**" menu.

At any time, the workflow supervisor can have a clear view of the number of documents in the workflow and at what stages they are in :



A simple click on the pop-up (green or red) gives the supervisor a specific status:

**Task**

Overdue Task(s)

Processing

Documents	Participants	Duration of the task	
Invoice_Amazon_3567...	Sandra Dujardin ✕	24 hours remaining	<input type="checkbox"/>

Erase documents

Follow up by e-mail

Change participant

From this screen, you can perform the following operations:


- **Change participant:** You must first change the participant in the "Participant" column for the changes to be applied.
- **Erase documents** : the documents will exit the workflow with the "Rejected" status.
- **Follow up by e-mail**: selected tasks participants will receive a follow up e-mail



## List of tasks

Click on the "**Workflow \ Liste des tâches**" menu.


The same information on a Workflow is available from the "List of tasks":

List of tasks  List of Workflows

Actions on the selection + Validate Reject Display 25 Items per page

Actions	Status	Entry date	Deadline	Production date	Name	Tasks	Assigned to	Document name	Filing category
<input type="checkbox"/>	Pending				All	All			All
<input type="checkbox"/>		2016-04-08 12:40	-2 day (s) 23:36		Supplier invoices	Invoice reception	Natasha St Martin	Invoice_KALI_123456_04-28-2015	Supplier invoices
<input type="checkbox"/>		2016-04-08 12:41	-2 day (s) 23:35		Supplier invoices	Invoice reception	Natasha St Martin	Invoice_IMPO_1234569775_05-05-2015	Supplier invoices
<input type="checkbox"/>		2016-04-08 12:43	-2 day (s) 23:33		Supplier invoices	Invoice reception	Natasha St Martin	Invoice_IMPO_1234569775_05-06-2015	Supplier invoices
<input type="checkbox"/>		2016-04-08 12:43	-2 day (s) 23:33		Supplier invoices	Invoice reception	Natasha St Martin	Invoice_Flashbay_5484135489_04-01-2015	Supplier invoices
<input type="checkbox"/>		2016-04-08 12:44	-2 day (s) 23:32		Supplier invoices	Invoice reception	Natasha St Martin	Invoice_IMPO_1234569775_05-07-2015	Supplier invoices
<input type="checkbox"/>		2016-04-08 12:45	-2 day (s) 23:31		Supplier invoices	Invoice reception	Natasha St Martin	Invoice_KALI_15-109076_04-23-2015	Supplier invoices

From this screen a supervisor can perform the following operations:

The "**Validate**" and "**Reject**" buttons allow to process tasks in batches.  Only tasks assigned to the connected user can be processed.

The "**Actions on the Selection**" button allows operations on several tasks at the same time:

Tasks


To process To supervise

Actions on the selection

- Change participant
- Erase selection
- Follow up by e-mail

Number	Tasks
#1	Invoice_Amazon_3567879_2015-10-26 Workflow > Supplier Invoice > Dpt approval
#2	Invoice_Amazon_3567326_2015-05-24 Workflow > Supplier Invoice > CFO approval

☒ Pending

- **Change participant:**  You must first change the participant in the "Participant" column for the changes to be applied.
- **Erase documents :** the documents will exit the workflow with the "Rejected" status.
- **Follow up by e-mail:** selected tasks participants will receive a follow up e-mail



### 3.6.4.3 Changing a task participant

#### Changing a task participant

The workflow supervisor can change a participant of a workflow task.

From the "**Workflow \ List of workflows**", click on the "Change participant" button.



It is then possible to select any user or group as a new task participant.

#### Changing participant retroactivity

If documents are pending in the task, you will be asked whether those documents should be allocated to the new participant, or remain assigned to the previous participant.

#### Changing participant for pending documents

It is also possible to change the participant for pending documents, without changing the task participant.

Thanks to this feature, a supervisor may decide to delegate the processing of one or more documents to a particular user.

Refer to the [Tasks tracking](#) section for this operation.



## 3.7 Using a digital safe box

### 3.7.1 Management of digital items

#### 3.7.1.1 Filing a digital item

To add a document (digital item) in a Secured ConservationSpace:

1. Click on the "**Documents**" tab
2. Navigate through the folder tree to the Secured Conservation Space folder
3. Click on "**add document**"

Open Bee™ Portal

Search

Hello Romain Arpin  
[User guide](#) | [Video tutorial](#) | [Sign out](#)

Drop a document

Share a document

Dashboard

Documents **1**

Filing

Workflow

Administration

Hide menu

Documents

(2 items)

Smart view

Root folder

My document **2**

Bijou Ltd

Actions on the selection

Current folder commands

Custom view

Display 25 Items per page

Date	Status
2016-03-17 19:10	
2016-03-24 10:45	



### Deposit in uncontrolled mode

Select the document from your PC and click "**Save**":

**Add document**

Document to download

1 Browse...

Filing category

Default

Document name

Document description

Save

2

### Deposit in controlled mode

1. Select the document from your PC as for the uncontrolled mode
2. Enter the document hash
3. Enter the algorithm that was used to calculate the hash
4. Click on "**Save**"





The screenshot shows the 'Add document' form with the following fields and steps:

- Step 1:** 'Document to download' field with a 'Browse...' button.
- Filing category:** A dropdown menu set to 'Default'.
- Document name:** A text input field.
- Document description:** A large text area.
- Hash:** A text input field, marked with **Step 2**.
- Algorithm used to compute the hash:** A dropdown menu set to 'sha256', marked with **Step 3**.
- Save:** An orange button at the bottom, marked with **Step 4**.

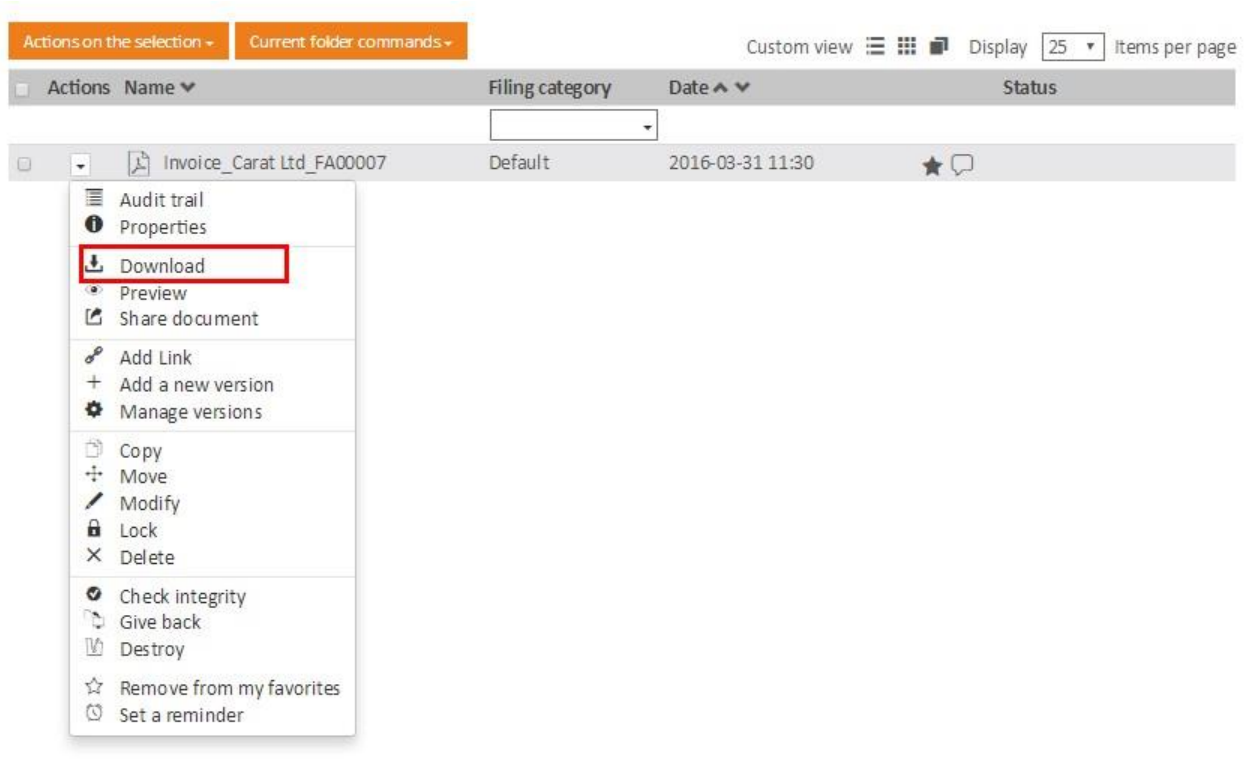
If the hash does not match the uploaded document, the deposit will be refused

The screenshot shows the 'Add document' form with an error message at the top: 'file : Document path is mandatory'. The fields are the same as in the previous screenshot, but the 'Save' button is no longer highlighted with a step number.



### 3.7.1.2 Reading a digital item

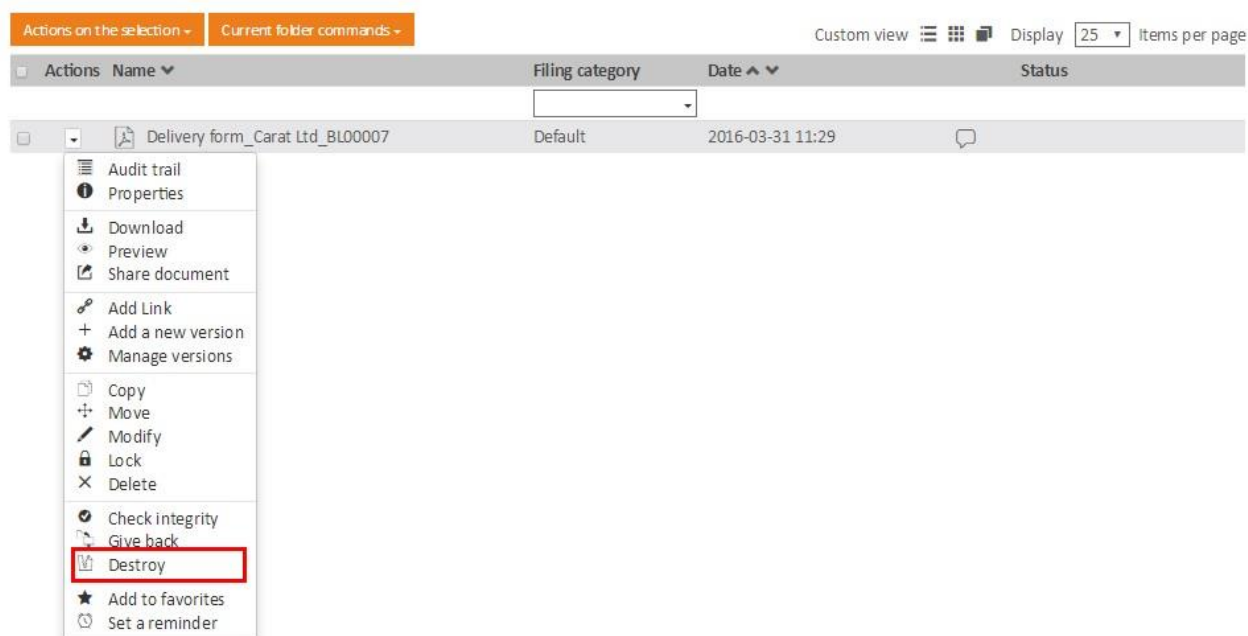
To read a document, click "**Download**" from the menu on the document and consult the document from your workstation.



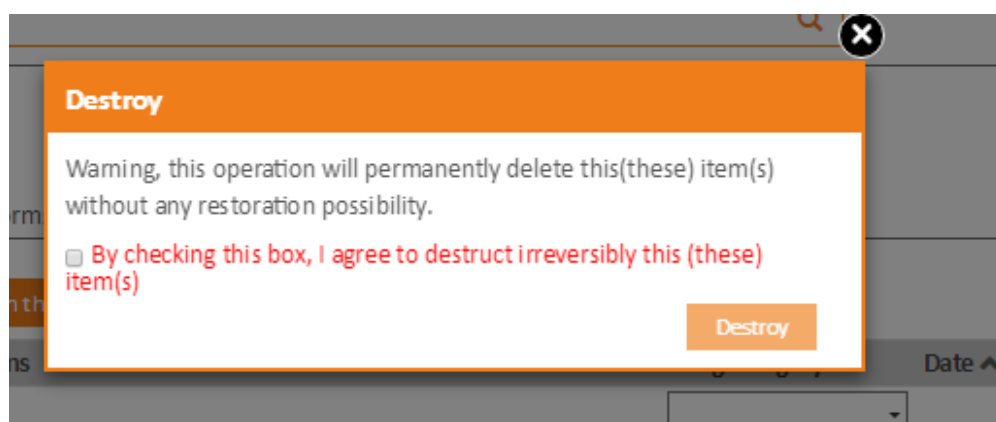
### 3.7.1.3 Destroying a digital item

To permanently remove a document without the possibility of restoration, click "**Destroy**" from the menu on the document.

This operation is non-reversible. No one will be able to restore your documents once it has been destroyed.



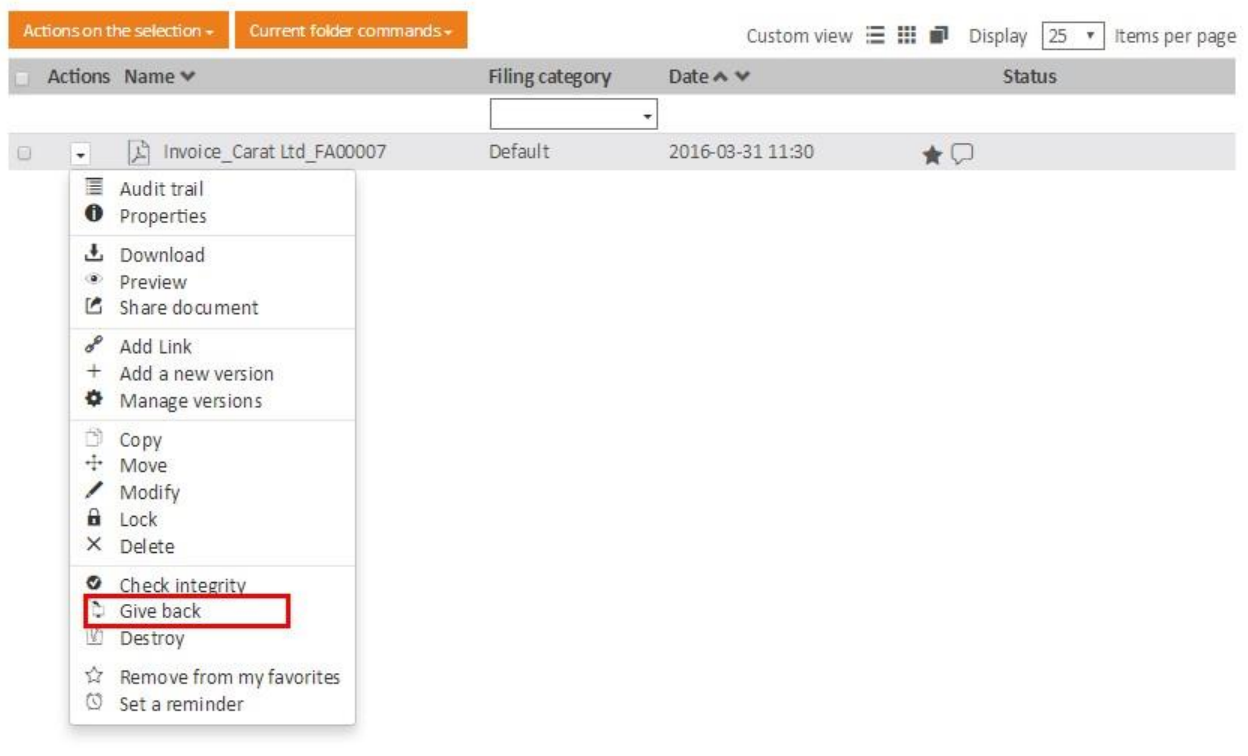
A confirmation window appears, it is necessary to tick the check box before validating the destruction.



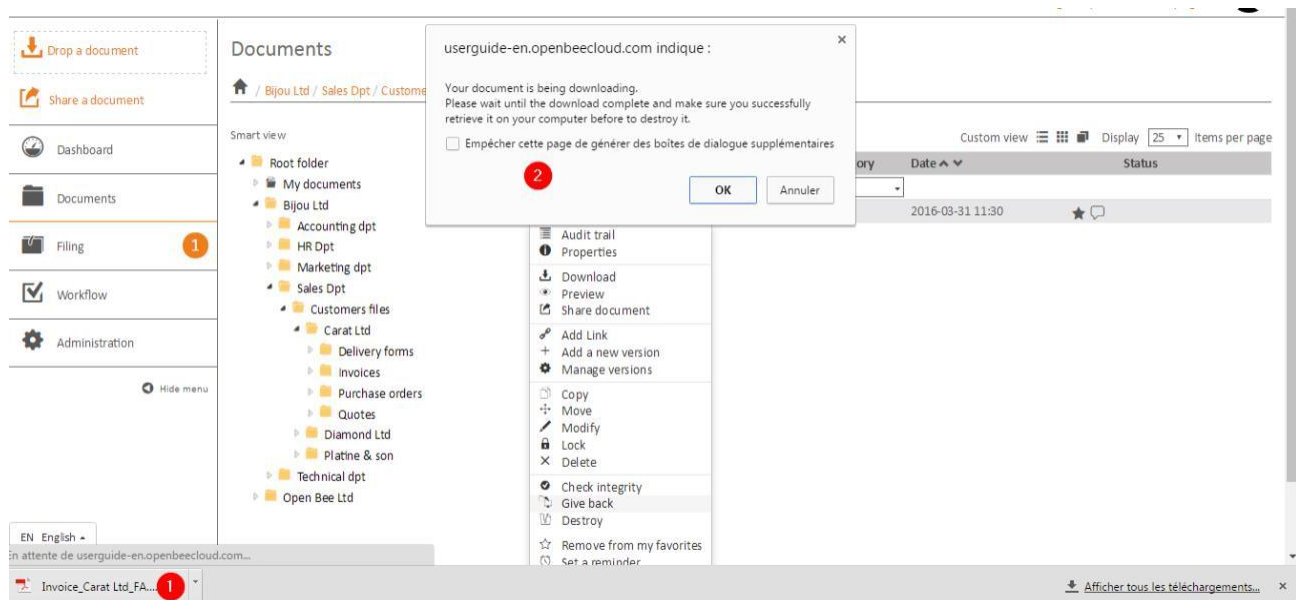
#### 3.7.1.4 Restitution of a digital item

The document restitution is the combination of downloading and destruction operations.

To restitute a document, click on "**Give back**" from the menu on the document.



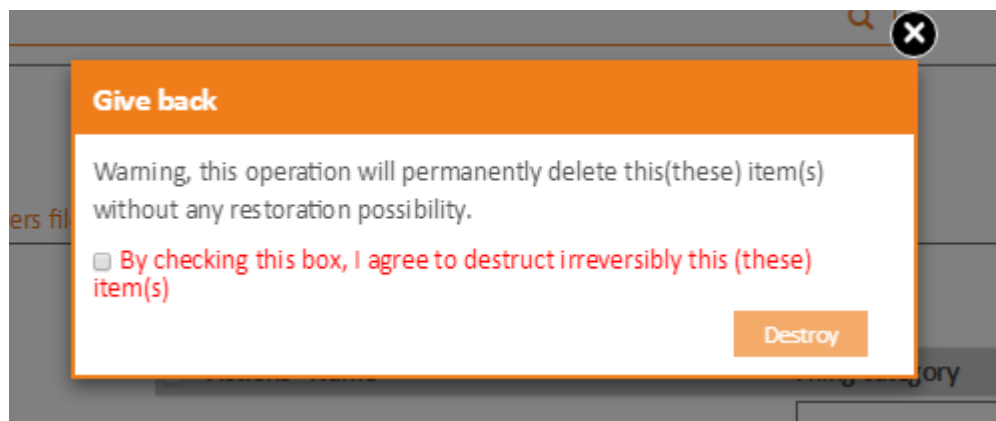
1. The document download begins
2. A window tells you to wait until the download is complete and check the successful recovery of the document on your workstation before proceeding with its destruction.





Once the document is recovered, a new window prompts you to proceed with the destruction of the document.

This operation is irreversible, nobody will be able to restore your document once the recovery process is complete and the document destroyed.

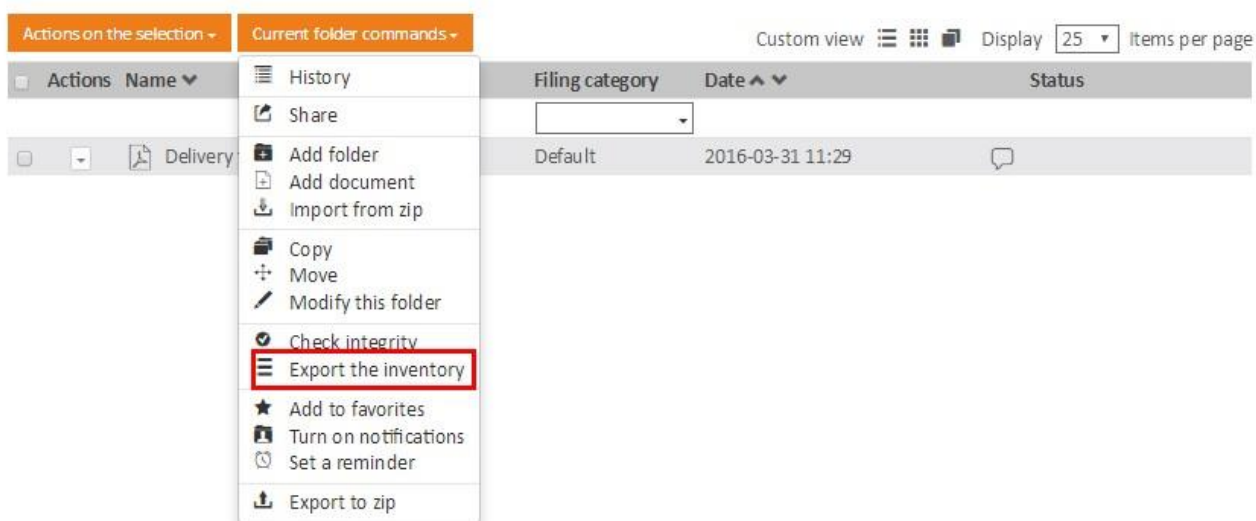


## 3.7.2 Integrity and grouped management of digital items

### 3.7.2.1 Secured Conservation Space items inventory

The Secured Conservation Space items inventory is viewable in a CSV file form.

To view the inventory, click **"Export the inventory"** from the menu on the Secured Conservation Space folder.





A CSV file is downloaded with the following columns:

- id\_document\_version: document's version unique identifier
- id\_document: unique document identifier
- name: document name
- description: document description (Optional field)
- size : document size in bytes
- md5 : the document hash calculated with the MD5 algorithm
- sha256 : the document hash calculated with the SHA256 algorithm
- path : the document path in the Open Bee™ Portal tree structure.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	id_document_version	id_document	extension	name	Description	size	md5	sha256	path				
2		330	708 pdf	20110726170150		146651	d634602684fa105c62901c2ae4db29c125		/Natasha/Mes factures/20110726170150.pdf				
3		331	709 pdf	20110726170152		137690	ea1bc776a7d47433c53f:fa89e0a4ebbb13		/Natasha/Mes factures/20110726170152.pdf				
4		328	705 pdf	20110726170149		77659	eea81383c419db4e60de333cfa62ed5fcc		/Natasha/20110726170149.pdf				
5		329	706 pdf	20110726170150		146651	d634602684fa105c62901c2ae4db29c125		/Natasha/20110726170150.pdf				
6													
7													
8													
9													
10													

### 3.7.2.2 Integrity check of a digital item

To check a document integrity, click on **"Check integrity"** from the menu on the document.

Actions on the selection - Current folder commands -

Custom view Display 25 Items per page

Actions	Name	Filing category	Date	Status
	Delivery form_Carat Ltd_BLO0007	Default	2016-03-31 11:29	

Audit trail  
 Properties  
 Download  
 Preview  
 Share document  
 Add Link  
 Add a new version  
 Manage versions  
 Copy  
 Move  
 Modify  
 Lock  
 Delete  
 **Check integrity**  
 Give back  
 Destroy  
 Add to favorites  
 Set a reminder



Following this action, the document integrity will be checked as follows and the operation result will be displayed on the screen:

### 3.7.2.3 Integrity check of the Secured Conservation Space

#### By the manager

To check a Secured Conservation Space integrity, click on "Check integrity" from the menu on the Secured Conservation Space folder.

The screenshot displays the Open Bee Portal interface. At the top, a green notification box states "The document is integrated". Below this, the breadcrumb path is ".td / Delivery forms / (1 element)". The main content area shows a table with columns: Actions, Name, Filing category, Date, and Status. A single row is visible for "Delivery form\_Carat Ltd\_BL00007".

Below the table, a context menu is open for the "Delivery" folder. The menu includes options like History, Share, Add folder, Add document, Import from zip, Copy, Move, Modify this folder, Delete, Destroy, **Check integrity** (highlighted with a red box), Export the inventory, Add to favorites, Turn on notifications, Set a reminder, Manage permissions, and Export to zip.

A Secured Conservation Space integrity check will verify the integrity of all the Secured Conservation Space documents, one by one. This operation can take some time, it is carried out asynchronously on the Open Bee™ Portal server.

Once finished, the result is displayed in the **"Notifications"** tab in the Dashboard.



## Dashboard

The dashboard is divided into several sections. On the left, there are five summary cards: 'Documents to be filed' (1), 'Folder(s) to complete' (0), 'Shared items pending for approval' (0), 'Reminders' (14), and 'Notifications' (16). The main area is split into three panels. The top-left panel, 'Quick access', shows 'Recent documents' and 'Latest searches' with a list of files like 'Invoice\_Carat Ltd\_FA00007.pdf' and 'Purchase order\_Carat Ltd\_BC00007.pdf'. The top-right panel, 'My favorites', shows a list of favorite documents. The bottom panel, 'Notifications', has tabs for 'All', 'Documents', 'Folders', 'Comments', 'Reminders', and 'Workflow'. It displays two notifications from 'Bijou Ltd' about integrity checks, with the first one highlighted by a red box. A 'Remove all notifications' link is in the top right of the notifications panel.

Section	Item	Count/Status
Summary Cards	Documents to be filed	1
	Folder(s) to complete	0
	Shared items pending for approval	0
	Reminders	14
	Notifications	16

Document Name	Time
Invoice_Carat Ltd_FA00007.pdf	yesterday at 14:25
Invoice_Carat Ltd_FA00007.pdf	yesterday at 09:45
Purchase order_Carat Ltd_BC00007.pdf	yesterday at 09:42
Exemple.txt	yesterday at 09:39
Purchase order_Carat Ltd_BC00007.pdf	April 4, 2016 to 15:46
Purchase order_Diamond Ltd_BC00028.pdf	April 1, 2016 to 10:28
Delivery form_Diamond Ltd_BL00006.pdf	April 1, 2016 to 10:26
Delivery form_Carat Ltd_BL00007.pdf	April 1, 2016 to 09:42
Quote_Carat Ltd_DE00001.pdf	March 31, 2016 to 12:45

Notification	Time
Integrity check completed : Document(s) intagrated	friday to 12:54
Integrity check completed : Document(s) intagrated	friday to 12:35

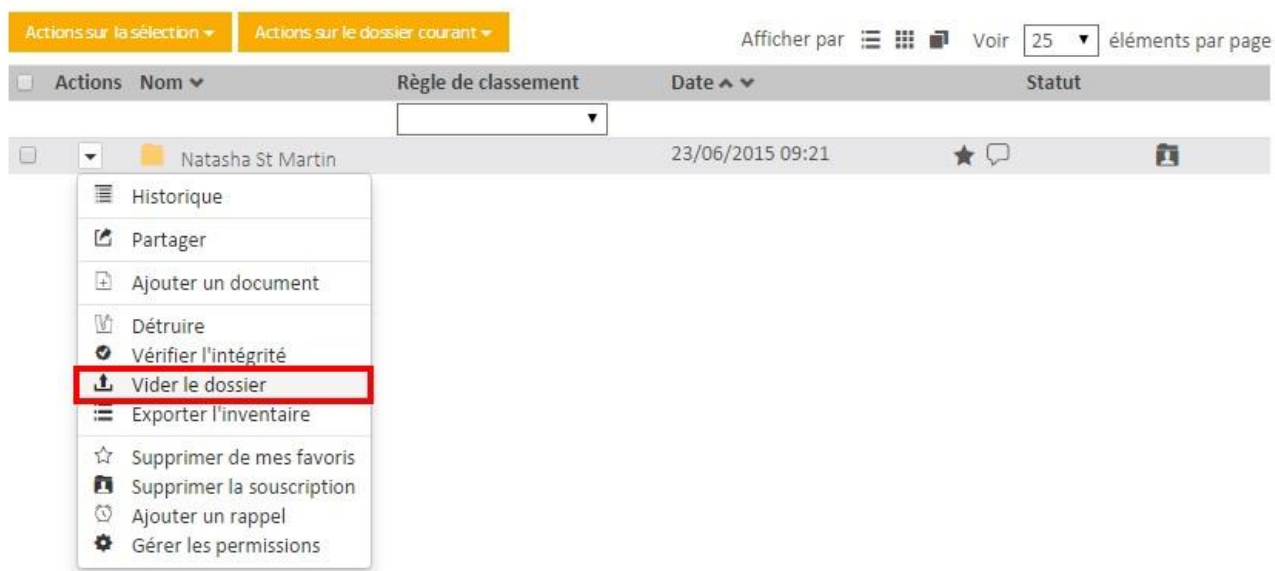
### 3.7.2.4 Clearing a Secured Conservation Space

The Secured Conservation Space manager may decide to clear it at any time. This allows to recover:

- all of its documents
- documents Inventory
- the Secured Conservation Space transactions

To clear a Secured Conservation Space, click on **"Clear the folder"** from the menu on the Secured Conservation Space folder.





Two options are available:

- Export to a downloadable ZIP. This option lets you recover data easily, but is limited to a volume of 4 GB.
- Export to a server file: in this case the data is exported to the server without volume limit



a St Martin / (0 élément)

### Vider le dossier

Vous êtes sur le point de vider ce dossier. Cette opération exportera l'ensemble des documents du dossier, leurs inventaires et les journaux associés puis les supprimera définitivement de Open Bee™ Portal. Cette opération est irréversible.

- ☐ Exporter vers un ZIP téléchargeable depuis votre navigateur (limité à 4 Go de données)
- ☒ Exporter dans un dossier du serveur (nécessite que l'administrateur du serveur récupère les données et vous les transmette)

Dossier :

☐ En cochant cette case, je confirme vouloir détruire cet (ces) élément(s) de manière irréversible.

Vider

As for the Secured Conservation integrity check, this operation can take some time. It is therefore achieved asynchronously on the Open Bee™ Portal server.

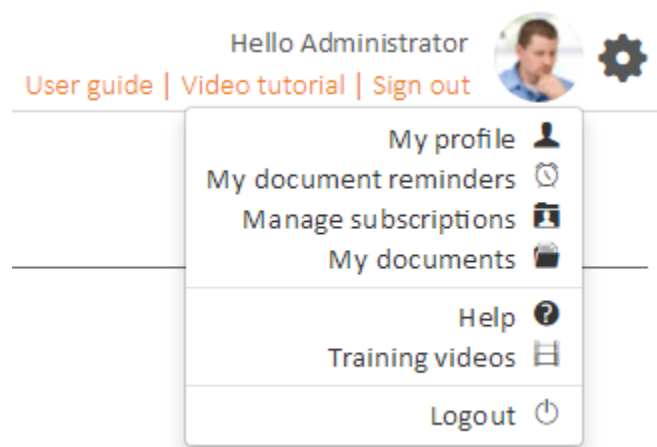
Once completed, a notification is displayed on all screens to allow the user to retrieve the content of his Secured Conservation Space.



## 3.8 User preferences

Click on the user's picture.

The user preferences are located on the top right corner of the screen. A menu allowing to access the "user" different preferences will appear.



The following elements are available:



### 3.8.1 Profile

My profil   Manage reminders   Manage subscriptions   My documents   Digital signature

Login	<input type="text" value="admin"/>
Full name	<input type="text" value="Administrator"/>
Password	<input type="password"/>
Confirm new password	<input type="password"/>
Email	<input type="text"/>
Telephone	<input type="text" value="🇫🇷 06 12 34 56 78"/>
Strong authentication	<input type="text" value="Unactivate"/>
Workflow tasks notification frequency	<input type="text" value="Immediately"/>
Reminders notification frequency	<input type="text" value="Immediately"/>
Subscriptions notification frequency	<input type="text" value="Immediately"/>
Comments notification frequency	<input type="text" value="Immediately"/>
Documents to be filed notification frequency	<input type="text" value="Immediately"/>

Profil picture (minimum 150 x 150)

Upload...



Save configuration

This screen allows the modification of the following elements:

- **Full name:** the user's name as seen by other users
- **Password:** allows to change the password.
- **Email:** used email to communicate with the user.
- **Phone:** optional field for the phone number
- **Frequency of notification:** These fields allow you to define the email notification sending policy.



- Immediately: as soon as an event occurs, it triggers the creation of a notification and an email is sent
- Once a day: an email with all notifications issued during the day is sent every night
- Once a week: an email with all notifications issued during the last 7 days is sent on the night of Monday to Tuesday.
- Never: no email will be sent for this notification's type
- Email notification: unchecking this box disables the sending of any email notification.
- Profile picture: allows to change the picture

### 3.8.2 Reminders

Allows viewing and modifying in a centralized manner the reminders defined by the logged in user. Refer to the "[Reminders on documents and folders](#)" section for more details about this feature.

### 3.8.3 Subscriptions

Allows viewing and modifying in a centralized manner the logged in user subscriptions.  
Refer to the "[Notifications management](#)" section for more details about this feature.

### 3.8.4 My documents

This element is a simple shortcut to the [User folder](#).



## 4 KNOWLEDGE BASE

### 4.1 FAQ

Answers to frequently asked questions about Open Bee Portal:

#### 4.1.1 How to change the documents storage folder

By default the documents are stored in the "openbeeportal/data" folder of the Open Bee™ Portal installation folder.

It is possible to change this folder as follows:

##### 4.1.1.1 Moving existing documents

Your existing documents must first be moved from the default location to the new location

##### 4.1.1.2 Changing the configuration

###### Version 6

As an administrator, log on to the address [http\(s\)://IP:PORT/administration/config](http(s)://IP:PORT/administration/config)

Modify the setting "storagePath" and save.



## Version 5

The documents storage path is defined in the *config/app.yml* file. Modify the `storagePath` setting value.

Table 5 nano *config/app.yml*

```
document:
  storagePath: '%SF_ROOT_DIR%/data/Documents'
```

Then empty the cache:

```
php symfony cc
```

### 4.1.2 How Open Bee Portal manages the storage capacity?

#### 4.1.2.1 What will happen when the maximum storage capacity available in the license is reached?

All Open Bee™ Portal features are available except the addition of documents and versions that are blocked.

#### 4.1.2.2 How do I know that the maximum storage capacity is about to be reached?

This information is available in the "Administration> License" screen.

In version 6, an additional message is displayed on the dashboard when the storage used reaches 90% of the available space in the license.

#### 4.1.2.3 Is the storage space shared between all users?

If you have purchased a license for 50 users with 2GB per user, it is  $50 \times 2 = 100\text{GB}$  that are available in total in your documentary space. It is this total storage capacity which is limited. It is therefore shared by 50 users.



#### 4.1.2.4 How is calculated the used storage space ?

The storage space you are using is the sum of:

- Size of all documents versions
- Thumbnail size created for displaying images or Office documents
- Database size (mainly the documents text content used for research)

#### 4.1.3 How are encrypted data in transit between Open Bee™ Portal and client applications?

The data is encrypted thanks to the HTTPS protocol (SSL or TLS). The algorithms for encryption and the key encryption size vary depending on the used clients.

The HTTPS protocol operates so that when initializing the connection, the client and server agree on the use of an encryption algorithm that they both support.

Some examples of encryption system used by some customers. These data may vary depending on the specific configurations of your machines / software.

Clients	Encryption
Open Bee™ Scan, Doc Office Manager, ERP Manager, Open Bee™ Sync - Windows 8	TLS_RSA_WITH_AES_128_CBC_SHA
Internet Explorer 11 - Windows 7	TLS_RSA_WITH_AES_128_CBC_SHA
Firefox 27.0.1 - Windows 7	TLS_ECDHE_ECDSA_WITH_AES_128_GCM_SHA256
Chrome 33 - Windows 7	TLS_ECDHE_ECDSA_WITH_AES_128_GCM_SHA256
Safari 6.1 - OSX 10.8.5	TLS_RSA_WITH_AES_128_CBC_SHA
Open Bee™ Mobile - Android 4.4.2	TLS_RSA_WITH_RC4_128_MD5
Open Bee™ Mobile - iOS 7	TLS_RSA_WITH_AES_128_CBC_SHA





To know the algorithms list sent from a Web browser: <https://cc.dcsec.uni-hannover.de>

To change the algorithms order with Firefox: <https://support.mozilla.org/fr/questions/976999>

To determine the encryption system from the network frames with Wireshark:

Algorithm sending available by the client:

Filter: `ip.addr == 192.168.68.239 && ssl.handshake.ciphersuite`

No.	Time	Source	Destination	Protocol	Length	Info
70	6.32948000	192.168.68.239	137.117.131.226	SSL	251	Client Hello
73	6.62937700	192.168.68.239	137.117.131.226	TLSv1.2	251	[TCP Retransmission] Client Hello
80	6.65848200	137.117.131.226	192.168.68.239	TLSv1.2	172	Server Hello, Certificate, Server Hello Done

Frame 70: 251 bytes on wire (2008 bits), 251 bytes captured (2008 bits) on interface 1

- Ethernet II, Src: LiteonTe\_7a:5d:9e (9c:b7:0d:7a:5d:9e), Dst: JuniperN\_11:13:8c (00:1f:12:11:13:8c)
- Internet Protocol Version 4, Src: 192.168.68.239 (192.168.68.239), Dst: 137.117.131.226 (137.117.131.226)
- Transmission Control Protocol, Src Port: 51444 (51444), Dst Port: https (443), Seq: 1, Ack: 1, Len: 197
- Secure Sockets Layer
  - TLSv1.2 Record Layer: Handshake Protocol: Client Hello
    - Content Type: Handshake (22)
    - Version: TLS 1.2 (0x0303)
    - Length: 192
    - Handshake Protocol: Client Hello
      - Handshake Type: Client Hello (1)
      - Length: 188
      - Version: TLS 1.2 (0x0303)
      - Random
        - Session ID Length: 32
        - Session ID: 53200000caecce3d896bf13bd789e95ea8fee40e81834b8f...
        - Cipher Suites Length: 42
        - Cipher Suites (21 suites)
          - Cipher suite: TLS\_RSA\_WITH\_AES\_256\_CBC\_SHA256 (0x003d)
          - Cipher suite: TLS\_RSA\_WITH\_AES\_128\_CBC\_SHA (0x002f)
          - Cipher suite: TLS\_RSA\_WITH\_AES\_128\_CBC\_SHA256 (0x003c)
          - Cipher suite: TLS\_RSA\_WITH\_AES\_256\_CBC\_SHA (0x0035)
          - Cipher suite: TLS\_RSA\_WITH\_RC4\_128\_SHA (0x0005)
          - Cipher suite: TLS\_RSA\_WITH\_3DES\_EDE\_CBC\_SHA (0x000a)
          - Cipher suite: TLS\_ECDHE\_RSA\_WITH\_AES\_128\_CBC\_SHA256 (0xc027)

Choice of algorithm by the server:



Capturing from 4 interfaces [Wireshark 1.10.0 (SVN Rev 49790 from /trunk-1.10)]

Filter: `ip.addr == 192.168.68.239 && ssl.handshake.ciphersuite`

No.	Time	Source	Destination	Protocol	Length	Info
70	6.32948000	192.168.68.239	137.117.131.226	SSL	251	Client Hello
73	6.62937700	192.168.68.239	137.117.131.226	TLSv1.2	251	[TCP Retransmission] Client Hello
80	6.65848200	137.117.131.226	192.168.68.239	TLSv1.2	172	Server Hello, Certificate, Server Hello Done

Frame 80: 172 bytes on wire (1376 bits), 172 bytes captured (1376 bits) on interface 1

- Ethernet II, Src: JuniperN\_11:13:8c (00:1f:12:11:13:8c), Dst: LiteonTe\_7a:5d:9e (9c:b7:0d:7a:5d:9e)
- Internet Protocol Version 4, Src: 137.117.131.226 (137.117.131.226), Dst: 192.168.68.239 (192.168.68.239)
- Transmission Control Protocol, Src Port: https (443), Dst Port: 51444 (51444), Seq: 4261, Ack: 198, Len: 118
- [4 Reassembled TCP Segments (4378 bytes): #74(1420), #76(1420), #78(1420), #80(118)]
- Secure Sockets Layer
  - TLSv1.2 Record Layer: Handshake Protocol: Multiple Handshake Messages
    - Content Type: Handshake (22)
    - Version: TLS 1.2 (0x0303)
    - Length: 4373
    - Handshake Protocol: Server Hello
      - Handshake Type: Server Hello (2)
      - Length: 77
      - Version: TLS 1.2 (0x0303)
      - Random
        - Session ID Length: 32
        - Session ID: 6a2500005730aab23209d4211502a43c7d1c0c08e5f374d6...
        - Cipher Suite: TLS\_RSA\_WITH\_AES\_128\_CBC\_SHA256 (0x003c)
        - Compression Method: null (0)
        - Extensions Length: 5
        - Extension: renegotiation\_info
    - Handshake Protocol: Certificate
      - Handshake Type: Certificate (11)
      - Length: 4284
      - Certificates Length: 4281

#### 4.1.4 How to delete an Open Bee™ Portal user account ?

For traceability reasons of transactions made in Open Bee™ Portal, it is not possible to delete users.

However a user may be deactivated in this case:

- It no longer appears in all the application interfaces that allow to select a user
- It will not be taken into account in calculating the number of users available in the license

A deactivated user, can be reactivated at any time from the user administration screen.



#### 4.1.5 Does Open Bee™ Portal works with MS SQL Server or Oracle?

Open Bee™ Portal functions with a MySQL database and is not compatible with SQL Server or Oracle databases.

MySQL is a solid system that gives us complete satisfaction. It is further maintained for some years by Oracle, which guarantees the product quality. We therefore have no plan so far to change the DBMS or make our application compatible with other systems.

#### 4.1.6 What are the planned services and tasks used by Open Bee Portal

Open Bee™ Portal install multiple scheduled services and tasks.

##### 4.1.6.1 Services list

Service name	Description	Port by default (Windows)	Functions
openbeeportalApache24	Web Server (Apache)	8000	HTTP requests processing
openbeeportalRabbitMQ	AMQP Server (RabbitMQ)	5672	AMQP requests processing
openbeeportal AMQP High Priority Queue	Listening service on an AMQP queue	5672	Asynchronous processing of the following functions: transmission of documents to Open Bee™ Scan OCS, checking the integrity of a file, emptying a folder
openbeeportal AMQP Low Priority Queue	Listening service on an AMQP queue	5672	asynchronous processing of the following functions: sending mails, Automatic electronic document signature
MySQL	Database	3306	Open Bee™ Portal metadatas storing.
Open Bee Scan O.C.S	Web server (Netty)	8080	HTTP requests processing on Open Bee™ Scan OCS service
MongoDB	Database	27019	Open Bee™ Scan OCS datas storing.



#### 4.1.6.2 Scheduled tasks list

Task name	Frquency	Role
OpenBeePortalLightJob	5 minutes	<ul style="list-style-type: none"><li>• Open Bee™ Scan OCS processings recovery.</li><li>• Reminders triggering</li><li>• Maintenance processing on the database</li></ul>
OpenBeePortalDailyJob	Daily	<ul style="list-style-type: none"><li>• LDAP synchronization</li><li>• Sending Notification emails (daily, weekly)</li><li>• Folder types recurrence</li><li>• Maintenance processing on the database</li><li>• Temporary Files Cleanup</li></ul>
OpenBeePortaldumpDMSdatabase	Daily	Dump of the database

#### 4.1.7 Is the number of items in a list limited?

No limitation is applied to the number of elements that you can add in the Open Bee™ Portal lists.

However beyond 5000 elements for the same list, slownesses appear in the value selection when filing or searching.

If you want to use lists of more than 5000 items, we recommend you to consider separating them into several lists and / or sub-lists.

#### 4.1.8 How to use the browser's PDF reader

Open Bee™ Portal includes a PDF reader allowing to view documents from the Web interface. This reader allows us to provide a unified user experience across all browsers and control print and download permissions on documents. Nevertheless, it is possible to change to use the browser's PDF reader.



**If you do not use the Open Bee™ Portal PDF reader, the following functions will not work anymore:**

- **Print document from the menu on the document**
- **Managing print and download permissions**

This configuration is available since version 6.5.2 of Open Bee™ Portal

In order to use the browser's PDF reader

- As an administrator, log on at the address `http(s)://IP:PORT/administration/config`
- Change the setting "portalPDFViewer" to false
- Save

## 4.1.9 Copy of User languages set-up/Customization

### 4.1.9.1 Users Interface language

By default Open Bee™ Portal detects the web browser's language and displays the web interface in that language . The language used for the display can be changed at any time from the menu.

**Attention :** The language of the browser's user interface is not necessarily the language that the browser will indicate to Open Bee™ Portal.

For example, in the screen below, Google Chrome uses "English" as its display language , but it indicates the "French" language to Open Bee™ Portal because it is the first in the list in the configuration. Hence , Open Bee™ Portal will be displayed in "French" by default.

Figure 1 image2016-10-26 16:23:44.png

### 4.1.9.2 E-mail notifications language

The language used to send email to a user is specific to each user.

By default, when creating a user, the language of the global configuration of the installation is assigned to the user. This language is either chosen by the installer during a Windows installation, or is determined automatically by the language of the operating system on a Debian installation.

Each time a user logs in to the web interface of Open Bee™ Portal with a language different from the one assigned to him, it is updated.



#### 4.3.12.2 Impacted versions

Open Bee™ Portal version 6.x. randomly on some installations

**Example :** The language chosen by the Open Bee™ Portal installer is "English" . When creating a user, the user will receive an account creation notification in "English".

If the user then connects using "French" in his browser, his language will be changed to French. If he receives a notification by email, it will be in "French".

#### 4.1.9.3 Changing/Modifying the global language at installation

In the installation folder :

- Open the "**settings.yml**" file with a text editor compatible UTF-8
- Modify the parameter "**default\_culture**"
- Save
- Empty/Clear cache of Open Bee™ Portal