

Documentation for Microsoft Addin

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Office Add-ins are compatible from version 2000 to version 2019

License

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Office Add-in Tool 7.1.x compatibility

Office Add-in tool version	OpenKM Compatibility		Status
	Professional	Community	
7.1.9	Version 7.1.14 and upper.	Not compatible.	Active.
7.1.8	Version 7.1.11 and upper.	Not compatible.	Deprecated.
7.1.7	Version 7.1.9 and upper.	Not compatible.	Deprecated.
7.1.6	Version 7.1.8 and upper.	Not compatible.	Deprecated.
7.1.5	Version 7.1.8 and upper.	Not compatible.	Deprecated.
7.1.4	Version 7.1.5 and upper.	Not compatible.	Deprecated.
7.1.3	Version 7.1.4 and upper.	Not compatible.	Deprecated.
7.1.2	Version 7.1.4 and upper.	Not compatible.	Deprecated.
7.1.1	Version 7.1.3 and upper.	Not compatible.	Deprecated.

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Not compatible. Deprecated.

Office Add-in Tool 6.2.x compatibility

Office Add-in tool version	OpenKM Compatibility		Status
	Professional	Community	
6.2.12	Version 6.4.52 and upper.	Not compatible.	Active.
6.2.11	Version 6.4.45 and upper.	Not compatible.	Deprecated.
6.2.10	Version 6.4.45 and upper.	Not compatible.	Deprecated.
6.2.9	Version 6.4.45 and upper.	Not compatible.	Deprecated.
6.2.8	Version 6.4.45 and upper.	Not compatible.	Deprecated.
6.2.7	Version 6.4.45 and upper.	Not compatible.	Deprecated.
6.2.6	Version 6.4.45 and upper.	Not compatible.	Deprecated.
6.2.5	Version 6.4.38 to 6.4.44.	Not compatible.	Deprecated.
6.2.4	Version 6.4.38 to 6.4.44.	Not compatible.	Deprecated.
6.2.3	Version 6.4.31 to 6.4.44.	Not compatible.	Deprecated.
6.2.2	Version 6.4.26 to 6.4.44.	Not compatible.	Deprecated.
6.2.1	Version 6.4.21 to 6.4.44.	Not compatible.	Deprecated.
6.2.0	Version 6.4.21 to 6.4.44.	Not compatible.	Deprecated.

Office Add-in 6.1.x compatibility

Office Add-in tool version	OpenKM C	ompatibility	Status
	Professional	Community	
6.1.2	Version 6.4.25 to 6.4.26.	Version 6.3.2 to 6.3.8.	Active.
6.1.1	Version 6.4.1 to 6.4.25.	Version 6.3.2 and upper.	Deprecated.

Download

- OpenKM Office Add-in tool 7.1.9 available at OpenKM Download center.
- OpenKM Office Add-in tool 7.1.8 available at OpenKM Download center.
- OpenKM Office Add-in tool 7.1.7 available at OpenKM Download center.
- OpenKM Office Add-in tool 7.1.6 available at OpenKM Download center.
- OpenKM Office Add-in tool 7.1.5 available at OpenKM Download center.
- OpenKM Office Add-in tool 7.1.4 available at OpenKM Download center.
- OpenKM Office Add-in tool 7.1.3 available at OpenKM Download center.
- OpenKM Office Add-in tool 7.1.2 available at OpenKM Download center.
- OpenKM Office Add-in tool 7.1.1 available at OpenKM Download center.
- OpenKM Office Add-in tool 7.1.0 available at OpenKM Download center.
- OpenKM Office Add-in tool 6.2.12 available at OpenKM Download center.
- OpenKM Office Add-in tool 6.2.11 available at OpenKM Download center.
- OpenKM Office Add-in tool 6.2.10 available at OpenKM Download center.
- OpenKM Office Add-in tool 6.2.9 available at OpenKM Download center.
- OpenKM Office Add-in tool 6.2.8 available at OpenKM Download center.
- OpenKM Office Add-in tool 6.1.2
- OpenKM Office Add-in tool 6.1.1

Before running the application be sure you get installed Visual C++ Redistributable for Visual Studio.

- Visual C++ Redistributable for Visual Studio 2012 (<u>x86 or x64</u>) (Recommended).
- Windows installer 4.5.
- .NET Framework 4.5.2 (<u>x86 or x64</u>).

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User guide version 7.1.x

Oulook Add-in

Outlook Add-in 7.1.x enables users to select several emails and import content and attachments to OpenKM.

Importing mail creates a folder structure based on received email date (year/month/day folder structure) and imports into the mail content OpenKM mail tab view.

Word Add-in

Word Add-in 7.1.x enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM Word Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.

Excel Add-in

Excel Add-in 7.1.x enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM Excel Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.

PowerPoint Add-in

PowerPoint Add-in 7.1.x enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM PowerPoint Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.

Visio Add-in

<u>Visio Add-in 7.1.x</u> enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM Visio Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.

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Access Add-in

<u>Access Add-in 7.1.x</u> allows users to upload new files to OpenKM.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM Access Add-in will be visible once a database is opened.

Project Add-in

Project Add-in 7.1.x enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM Project Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.

Outlook Add-in 7.1.x

• Outlook addin enables users to select several emails and import them into OpenKM among other actions.

After installing the Outlook add-in, a new menu item "OpenKM" will appear in Outlook.

	Configuration	🔒 Import	Import only attachments	🕢 Help	-
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Detail of the functions according to their icons:

Button	Action
٨	Addin configuration.
	Import mail.
I	Import only attachments.
Θ	Help.

Configure OpenKM Add-In

First, you must select the **Configuration** menu item to set your configuration values to access OpenKM from the client computer.

Property	Туре	Description
Language	Select	Ms Addin user interface language.
User	String	User id for accessing OpenKM. okmAdmin
Password	String	The password of the user.
Attachment path	String	OpenKM path where will be stored the intercepted attachment when the user is sending an email.

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Add metadata	Bool	To enable/disable metadata selection form.
Intercept attachment	Select	 Choose the behaviour when the user send an email with attachments. Never do anything Ask if you want to intercept and import into OpenKM. Always intercept and import into OpenKM.
		When OpenKM intercepts an attachment, it is imported to OpenKM and replaced into the sent email by and OpenKM URL of the document (attachment imported).
Enable attachment	Checkbox	Enable or disable activity log of intercepted attachments.
log		This feature is only available when OpenKM is working with MySQL or MariaDB database.

When you set your configuration values, a folder called **OpenKM** is created in your user **My documents folder**.

In this OpenKM folder, a configuration file named **openkm.xml** and another file named **document.xml** are created. The OpenKM Add-in uses to store some document editing information. You should not edit or delete these files.

Importing emails to OpenKM

The user can import emails from Outlook to OpenKM in three ways:



- 1. Select the option "Import" in the OpenKM toolbar.
- 2. Dragging the mail to a folder inside the OpenKM navigator tree in the left panel.
- 3. Right click on the mail and choose the option "import" inside the menu OpenKM.

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🔂 Nuevo 🗸 🏟 🖓 🗙 🖓 Responder	Responder a todos	Beenvia	ar 🔡 🦞 🚰 Enviar y regibir 🔹 🆄	Buscar en lib
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Correo 1	« 🖾 Bande	eja de en	trada	test
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Bandeja de entrada (1048) Elementos enviados	Organizado p	or: Fecha	Más nuevo encima 🗸	Enviado: miér Para: ph@
Carpetas de correo	A E Hoy			🖂 Mensaje
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Carpetas personales Bandeia de entrada (1048)	test	_	Abrir	
		4	Imprimir	Mail tes
Correo		2	Responder	
Calendario		2	Responder a todos	
251		🙈	Reenviar	
OpenKM 2,05 Context	*		Ver datos adjuntos	
			Seguimiento +	
Taxonomy	3		Clasificar +	
C Grouped			Marcar como leído	
B C okm.root			Buscar todos	
2016 test		1	Crear regla	
- J tool			Correo electrónico no deseado 🕨	
			ESET Smart Security	
		\times	Eliminar	
		23	Moyer a una carpeta	3
			Opciones de mensajes	~
			OpenKM +	Import

In cases one and three then you must select the destination path to import the mail.

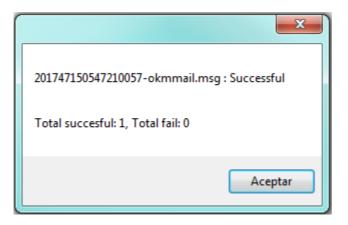
When **grouped checkbox is checked** will be **added** at the end of the path the subfolder **Year/Month/Day**.

That means if you have choosen destination path "/**okm:root/email**" and grouped checkbox is checked the destination path will be "/**okm:root/email/2017/03/24**" (sample based in actual date value as " **2017/03/24**").

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() Navigation tree		l	
Context Taxonomy	▼ Refresh Sea	rch Upload	Cancel
⊡- 🤄 okm:root - 🔄 2016 - 😂 test			

After importing is finished, a message indicating the number of emails and attachments imported will be displayed.



If you have activated the option "Add metadata" in the configuration, it will allow you to select and fill in the corresponding data.
 In the case of having multiple selection metadata to mark and unmark all options, you can use the key combination "Ctrl" + "E" and "Supr" respectively.

Importing attachments to OpenKM

The user can import attachments from Outlook to OpenKM in two ways:

To import attachments, first select one email.

- 1. Select the option "Import only attachments" in the OpenKM toolbar.
- 2. Right click on the mail and choose the option to "Import only attachments" inside the menu OpenKM.

Archivo Edición Ver Ir Herramier	ntas Acci	ones ?				
🔂 Nuevo 🔹 🖓 🖓 🗙 🙈 Responde	er 🙉 Resp	oonder a todos 🛛 🔒 🖪	eenvia	ar 🛛 🔡 🥙 📑 Enviar y re <u>c</u> ibi	r • 🖄	🔛 Buscar en libreta
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Configuration DImport	only attach	nments 🚱 Help 👳				
Correo	1 "	🧧 Bandeja d	e en	trada		test
Carpetas favoritas	*	Buscar Bandeja de e	ntrad	ð	₽ • ₹	Pablo Herrera
Bandeja de entrada (1048)		Organizado por: Fecha Más nuevo encima			a 🔺 🏝	Enviado: miércolo Para: ph@gm
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Carpetas personales Bandeia de entrada (1048)	¢	test	-	Abrir Imprimir		Mail test
Correo			-		_	
Calendario			-	Responder Responder a todos		
Calcidano			-	Reenviar		
OpenKM	*			-		
Context				Ver datos adjuntos	,	
Taxonomy	- 🔧			Seguimiento	*	
Grouped			~	Clasificar	,	
			9	Marcar como leído		
Criminal Contract				Buscar todos	,	
- Co test				Crear regla		
				Correo electrónico no deseado	•	
			~	ESET Smart Security	,	
			X	Eliminar		
			-	Mover a una carpeta	_	
				Opciones de mensajes		2
				OpenKM	•	Import

0	
Attachment	
☑ test.docx	
test.pdf	
Next	Cancel

Check the attachments to be imported and click the **next** button to finish.

After importing is finished, a message indicating the attachments imported will be displayed.

Add attachments from openkm to a new mail

The user can add attachments from OpenKM.

- 1. First we click the **New** button to create a new mail.
- 2. Press the **Add attachment** button, it will show the file explorer inside OpenKM from which you might select one or more documents that you want to attach into the mail and then press the **select** button.
- 3. You can view the attachments in the compose mail section for it.

S Outlook para hoy - Microsoft Outlook
Archivo Edición Ver I <u>r</u> Herramientas Acci <u>o</u> nes <u>?</u>
🔁 Nuevo 🔹 🖨 🔚 Enviar y recibir 🔹 🛄 Buscar en libretas 🔹 🔹 🎯 💂
👯 🛞 Atrás 🛞 📫 📄 🦃 🏨 🖕
Configuration Import @ Import only attachments I Help
Correo 💽 🖌 🤊 🙂 🔹 test attahments - Mensaje (HTML)
Carpetas fa Mensaje Insertar Opciones Formato de texto OpenKM
Band Configuration
Carpetas de Add attachments 2
P Todos lo
OpenKM Actions
Ba Mensaje sin enviar.
Correo De
Calenda Para pherrera@openkm.com;
Secontacian CC
() Openk
Context Asunto: test attahments
Taxonomy Adjunto: <u>Mtest.docx (12 KB); test.xlsx (8 KB); test.pptx (31 KB)</u> 3
Groupel
test mail
Ca 2
Finalizado

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Log

In **My Documents/OpenKM** there's a file log called OutlookAddin.log with a complete log trace.

Intercept attachments

First, you must select the **Configuration** menu item to set your configuration values to access OpenKM from the client computer.

Property	Туре	Description
Attachment path	String	OpenKM path where will be stored the intercepted attachment when the user is sending an email.
Intercept attachment	Select	 Choose the behaviour when the user send an email with attachments. Never do anything Ask if you want to intercept and import into OpenKM. Always intercept and import into OpenKM. When OpenKM intercepts an attachment, it is imported to OpenKM and replaced into the sent email by and OpenKM URL of the document (attachment imported).
Enable attachment log	Checkbox	Enable or disable activity log of intercepted attachments. Image: A state of the st

Once **configured**, create a **new mail** with some attached files and we **send** it.

	<u>ت</u> ۳	∓ (♦ 4	test - Mens	aje (HTML)			- • ×
	Mensaje	Insertar Opcior	nes Formato de	texto Ope	nKM		۲
Portapap	≣ N ∛ ⊉	bri (Cuerpo) ▼ 11 ▼ K S E = 1 = 7 ▼ A ▼ E = = = Texto básico	Mombro	s Sincluir	Seguimiento Opciones	AB AB Revis ortogra Revis	ión ífica -
Enviar	De Para CC CCO Asunto: Adjunto:	pherrera@openkm.com test					
Interc	ept attachn	nent test					

The attachment it is imported into OpenKM and the mail attachment is replaced on fly by OpenKM URL of the document (attachment imported).

In case you have selected the Ask or Always option of the Intercept attachment feature and the Enable attachment log feature is activated, it will be stored in the database a log of mail with senders and date.

roundcube 🍣	
Volver Redactar	sponder a Reenviar Eliminar Mover Imprimir Marcar Más
🖸 Entrada 15	test
/ Borradores	De Pablo Herrera
🚱 Enviados	Destinatario pherrera@openkm.com 14* Fecha Hoy 16:46
Papelera	Intercept attachment test Documents attached <u>out.pdf</u> <u>test.docx</u>

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If you click in the OpenKM URL of the document you will be directed to the location of the document into OpenKM.

OpenKM	×	+	1	-	-	
(i) localhost:8080/OpenKM/f	ronter	nd/ind C	Q B	luscar	☆ 自 🗣	☆ ♡
Archivo Edición Herramientas	Marcad	dores Plantillas	Ayuda			
**		2 🗋 🗖 🏹		& n n 4	- <u>-</u>	4 @ Þ [
📇 Taxonomía		Ruta : /okm:root/te	est /2017	//03/24/		
⊖ 🗁 test	*			Nombre	Título	Idioma
E 🗁 2017			-	out.pdf		
🖻 🗁 03				test.docx		
24						

Word Add-in 7.1.x

Word Add-in enables users to upload new files and edit existing OpenKM files.

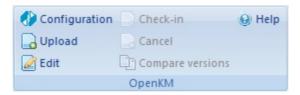
When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM Word Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.



Office Add-ins are compatible from version 2000 to version 2019.

After installing the Outlook add-in, a new menu item "OpenKM" will appear in Outlook.



Detail of the functions according to their icons:

Button	Action
۲	Addin configuration.
	Add new document
	Document edit (check-out)
	Upload modified document (check-in)
	Cancel document edit
Đ	Compare versions
0	Help

Configure OpenKM Add-In

Created in 2016 by OpenKM. OpenKM documentation is provided under OpenKM documentation license.

First, you must choose the **Configuration** menu item to set your configuration values to access OpenKM from the client computer.

Property	Туре	Description
Language	Select	Ms Addin user interface language.
User	String	User id for accessing OpenKM.
Password	String	The password of the user.
Host	String	OpenKM url. https://demo.openkm.com/OpenKM/
Add metadata	Bool	To enable/disable metadata selection form.

After you set your configuration values, a folder called **OpenKM** is created in your user **My documents folder**. In this OpenKM folder, a configuration file called **openkm.xml** and another file called **document.xml** are created that the OpenKM Add-in uses to store some document editing information. You should not edit or delete these files.



Uploading a new file

Click on the add new document button, a folder tree view will be shown. You must select the folder where you want to upload the file.

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() Navigation tree		
Context Taxonomy	Refresh Search	Upload Cancel
e-Contract C		

Click on the **Send** Button and after that, the document will be uploaded to OpenKM and a notification message will be shown.

×
Document has been send successfuly
Aceptar

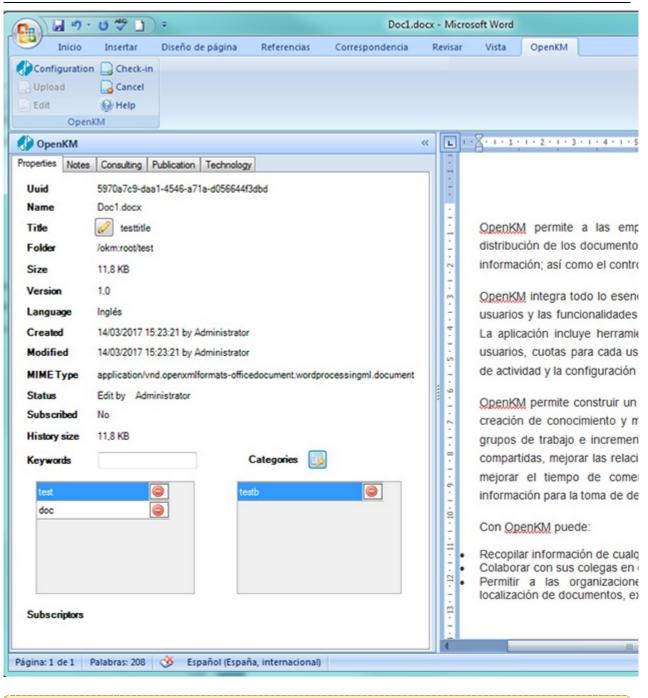
If you have activated the option "Add metadata" in the configuration, it will allow you to select and fill in the corresponding data.
 In the case of having multiple selection metadata to mark and unmark all options, you can use the key combination "Ctrl" + "E" and "Supr" respectively.

Editing an OpenKM document

Clicking on the *clicking* document edit button, a folder navigator will be shown. You must navigate across folders and select a document that you want to edit.

Taxonomy -	Search folder	Search document	Edit
e with the second		Name	Author
<mark>/a</mark> n 2016 /∂→ test	► E	Doc1.docx	okmAdmin
	2	Doc2.docx	okmAdmin
	J. J	OKMPdf-000002.pdf	okmAdmin

When you've got some OpenKM document opened, the **Upload modified document** (check-in) and **Cancel document edit** toolbar options will be enabled.



In the left panel, you can view the properties, notes, relations, and metadata of the document.

Notes tab

Ω

Page	27	of	127
1 age	21	O1	14/

operties Notes	Relations Consulting	Publication	Technology			
Author	Text		Date			1
Administrator	My note 1		17/07/	/2018 9:39 (3 0	
Administrator	My note 2		17/07/	/2018 9:39 (\$ O	
		Add note				

Relations tab

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erosoft Addin		
👂 OpenKM		<
roperties Notes	Relations Consulting Publication Technology	
Relation type	Equivalent 🔹	-
Relation	Bidirectional	
BIDIRECTIO	NAL RELATIONS	
Bidirectional	1 a.docx 🤤	
Bidirectional	2 b.docx	
Child Parent	Lest xlsx Contract to the second seco	
GROUPREL	Ations 📸	
Group 1 - A		
0 🥥 🛃 4		
⊠ test3	😑 📄 ABC.docx 🤤 📄 testing.docx 🤤	
📄 test.de	xx 🤤 📑 test 🤤 📄 test1 🤤	_
Group2 - A		
0 🔾	🛍 🚔 🏘	

Metadata tab

Page 29 of 127

Microsoft Addin

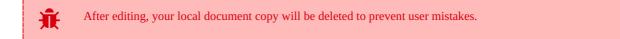
🚯 OpenKM	«
Properties Notes Relatio s Consulting Publication Technology	
Name Test	
Date 17/07/2018	
Important 🔽	
Comment Any comment	
Update Remove	
	1

• To upload a modified document, use the 🔲 Upload modified document (check-in) toolbar button.

OpenKM 📃	x
Enter a comment for the version	
new version	
Major minor version	
OK Cancel	

Insert a comment for the version and press the **OK** button.

• To cancel document edition, use the 📴 Cancel document edit toolbar button.



Compare versions

Clicking on the "Compare versions" button will display the version history in a pop-up allowing you to select a version to compare with.

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G	0-0-0-00) =		Invoice	1_7_v1.26.d	ocx - Micro	soft)	Vord			
100		iseño de página	Referencias Cor	respondencia	Revisar	Vista	Nu	ance O	CR OpenKM		
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>>	Resumen: 7 revisiones 👩 👻	Documento com	parado (Invoice1_7.do	0)			x	Docu	mento original (Invoi	cel 7.docx - D	X(D)
OpenKM 📀	Cambios y comentarios del documento principal Insertado DXD					69		agen S.A.			
	Insertado DXD	Av. Paraíso, N Granada, Espa	CIF: B12578946 Av. Paraíso, № 123 Granada, España				Av.	sz B12578946 Paraiso, № 123 nada, España			
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Palat	eras: 53 🥸 Español (Espa	a, internacional)				-				(B 0	-

Log

In **My Documents/OpenKM** there's a file log called WordAddin.log with a complete log trace.

Excel Add-in 7.1.x

Excel Add-in enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM Excel Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.



After installing the Outlook add-in, a new menu item "OpenKM" will appear in Outlook.

```
🚯 Configuration 🔒 Upload 📝 Edit 📄 Check-in 🍚 Cancel 🛞 Help
```

Detail of the functions according to their icons:

Button	Action
۲	Addin configuration.
	Add new document
	Document edit (check-out)
	Upload modified document (check-in)
	Cancel document edit
0	Help

Configure OpenKM Add-In

First, you must select the **Configuration** menu item to set your configuration values to access OpenKM from the client computer.

Property	Туре	Description
Language	Select	Ms Addin user interface language.

Page 32 of 127

Microsoft Addin

User	String	User id for accessing OpenKM.
Password	String	The password of the user.
Host	String	OpenKM url. https://demo.openkm.com/OpenKM/
Add metadata	Bool	To enable/disable metadata selection form.

After you set your configuration values, a folder called **OpenKM** is created in your user **My documents folder**. In this OpenKM folder, a configuration file called **openkm.xml** and another file called **document.xml** are created that the OpenKM Add-in uses to store some document editing information. You should not edit or delete these files.



Uploading a new file

Click on the add new document button, a folder tree view will be shown. You must select the folder where you want to upload the file.

Page 33 of 127

() Navigation tree		l	
Context Taxonomy	▼ Refresh Search	n Upload	Cancel
e-Contract C			

Click on the Send Button and after that the document will be uploaded to OpenKM and a notification message will be shown.

x
Document has been send successfuly
Aceptar

If you have activated the option "Add metadata" in the configuration, it will allow you to select and fill in the corresponding data.
 In the case of having multiple selection metadata to mark and unmark all options, you can use the key combination "Ctrl" + "E" and "Supr" respectively.

Editing an OpenKM document

Click on the *click* document edit button, a folder navigator will appear. You must navigate across folders and select a document that you want to edit.

() Search						
Taxonomy -		Search folder		Search document	Edit	
E-Con okm.root				Name	Author	Version
Con test			•	test.pptx	test2	1.1
	Þ			test xlsx	okmAdmin	4.0
			1	test2.docx	okmAdmin	3.0
L						

When you've got some OpenKM document opened, the 📮 **Upload modified document** (check-in) and **Cancel document edit** toolbar options will be enabled.

• To upload modified document, use the Upload modified document (check-in) toolbar button.

OpenKM X
Enter a comment for the version
new version
Major minor version
OK Cancel

Insert a comment for the version and press the **OK** button.

• To cancel document editing, use the 📴 Cancel document edit toolbar button.

After editing, your local document copy will be deleted to prevent user mistakes.

Log

In My Documents/OpenKM there's a file log called ExcelAddin.log with a complete log trace.

PowerPoint Add-in 7.1.x

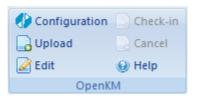
PowerPoint Addin enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM PowerPoint Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.

Office Add-ins are compatible from version 2000 to version 2019.

After installing the PowerPoint add-in, a new menu item "OpenKM" will appear in PowerPoint .



Detail of the functions according to their icons:

Button	Action
۲	Addin configuration.
	Add new document
	Document edit (check-out)
	Upload modified document (check-in)
	Cancel document edit
0	Help

Configure OpenKM Add-In

First, you must select the **Configuration** menu item to set your configuration values to access OpenKM from the client computer.

Property	Туре	Description
Language	Select	Ms Addin user interface language.
User	String	User id for accessing OpenKM.
Password	String	The password of the user.
Host	String	OpenKM url. https://demo.openkm.com/OpenKM/
Add metadata	Bool	To enable/disable metadata selection form.

After you set your configuration values, a folder called **OpenKM** is created in your user **My documents folder**. In this OpenKM folder, a configuration file called **openkm.xml** and another file called **document.xml** are created that the OpenKM Add-in uses to store some document editing information. You should not edit or delete these files.

Organizar 🔻 Compartir	con 👻 Grabar Nueva carpeta	s • 🖬 (
☆ Favoritos ↓ Descargas	Biblioteca Documentos	Organizar por: Carpeta 🕶
Escritorio		
Bibliotecas Documentos		
Imágenes Música	openkm.xml	
Subversion		

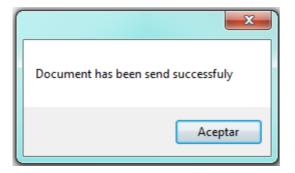
Uploading a new file

Created in 2016 by OpenKM. OpenKM documentation is provided under OpenKM documentation license.

Click on the add new document button, a folder tree view will be shown. You must select the folder where you want to upload the file.

() Navigation tree		
Context	Refresh Search	Upload Cancel
e- left okm:root eff 2016 eff test		

Click on the **Send** Button and after that the document will be uploaded to OpenKM and a notification message will be shown.



If you have activated the option "Add metadata" in the configuration, it will allow you to select and fill in the corresponding data.
 In the case of having multiple selection metadata to mark and unmark all options, you can use the key combination "Ctrl" + "E" and "Supr" respectively.

Editing an OpenKM document

Click on the 🜌 document edit button, a folder navigator will appear. You must navigate across folders and select a document

that you want to edit.

Taxonomy	▼ S	earch folder		Search document	Edit	
e 🤄 okm:root				Name	Author	Version
🤄 2016 🏹 test	b		٠	test.ppbx	test2	1.1
			0	test xlsx	okmAdmin	4.0
			1	test2.docx	okmAdmin	3.0

When you've got some OpenKM document opened, the **Upload modified document** (check-in) and **Cancel document edit** toolbar options will be enabled.

• To upload modified document, use the Upload modified document (check-in) toolbar button.

OpenKM	×
Enter a comment for the version	
new version	
Major minor version	ancel

Insert a comment for the version and press the **OK** button.

• To cancel document editing, use the 📮 Cancel document edit toolbar button.



Log

In My Documents/OpenKM there's a file log called PowerPointAddin.log with a complete log trace.

Visio Add-in 7.1.x

Visio Addin enables users to upload new files and edit existing OpenKM files.

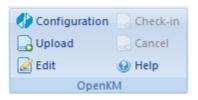
When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM Visio Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.



Office Add-ins are compatible from version 2000 to version 2019.

After installing the Visio add-in, a new menu item "OpenKM" will appear in Visio.



Detail of the functions according to their icons:

Button	Action
۲	Addin configuration.
	Add new document
	Document edit (check-out)
	Upload modified document (check-in)
	Cancel document edit
0	Help

Configure OpenKM Add-In

First, you must select the **Configuration** menu item to set your configuration values to access OpenKM from the client computer.

Property	Туре	Description
Language	Select	Ms Addin user interface language.
User	String	User id for accessing OpenKM. okmAdmin
Password	String	The password of the user.
Host	String	OpenKM url. https://demo.openkm.com/OpenKM/
Add metadata	Bool	To enable/disable metadata selection form.

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After you set your configuration values, a folder called **OpenKM** is created in your user **My documents folder**. In this OpenKM folder, a configuration file called **openkm.xml** and another file called **document.xml** are created that the OpenKM Add-in uses to store some document editing information. You should not edit or delete these files.

Organizar 👻 Comp	artir con 👻 Grabar Nueva carpeta	≥ • 1
🔆 Favoritos 🐞 Descargas	Biblioteca Documentos	Organizar por: Carpeta 🔻
Escritorio Sitios recientes Bibliotecas	=	
Documentos Imágenes Música Subversion	openkm.xml	
Videos		
🖳 Equipo		

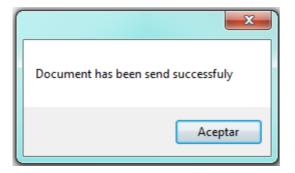
Uploading a new file

Created in 2016 by OpenKM. OpenKM documentation is provided under OpenKM documentation license.

Click on the add new document button, a folder tree view will be shown. You must select the folder where you want to upload the file.

() Navigation tree				
Context Taxonomy	▼ Refresh	Search	Upload	Cancel
e- left okm:root left 2016 left test				

Click on the **Send** Button and after that the document will be uploaded to OpenKM and a notification message will be shown.



If you have activated the option "Add metadata" in the configuration, it will allow you to select and fill in the corresponding data.
 In the case of having multiple selection metadata to mark and unmark all options, you can use the key combination "Ctrl" + "E" and "Supr" respectively.

Editing an OpemKM document

Click on the 🜌 document edit button, a folder navigator will appear. You must navigate across folders and select a document

that you want to edit.

Taxonomy	▼ Se	arch folder	Search document	Edit	
⊡- 🔄 okm:root			Name	Author	Version
- 2016 - 27 test	Þ	꾀	test.vsd	test2	1.1
		8	test xlsx	okmAdmin	4.0
		1 (C)	test2.docx	okmAdmin	3.0

When you've got some OpenKM document opened, the **Upload modified document** (check-in) and **Cancel document edit** toolbar options will be enabled.

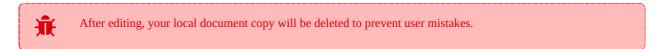
• To upload modified document, use the Upload modified document (check-in) toolbar button.

OpenKM 🛁	x
Enter a comment for the version	
new version	
Major minor version	

Created in 2016 by OpenKM. OpenKM documentation is provided under OpenKM documentation license.

Insert a comment for the version and press the **OK** button.

• To cancel document editing, use the 📮 Cancel document edit toolbar button.



Log

In My Documents/OpenKM there's a file log called PowerPointAddin.log with a complete log trace.

Access Add-in 7.1.x

Access Addin allows users to upload new files to OpenKM.

To upload a new file, choose a destination folder from the OpenKM tree view.

The OpenKM Access Add-in will be visible once a database is opened.

Office Add-ins are compatible from version 2003 to version 2019.

After installing the Access add-in, a new menu item "OpenKM" will be shown in Access.

🏈 Configuration 🔒 Upload 🔞 Help

Detail of the features according to their icons:

Button	Action
۲	Addin configuration.
	Upload file.
0	Help

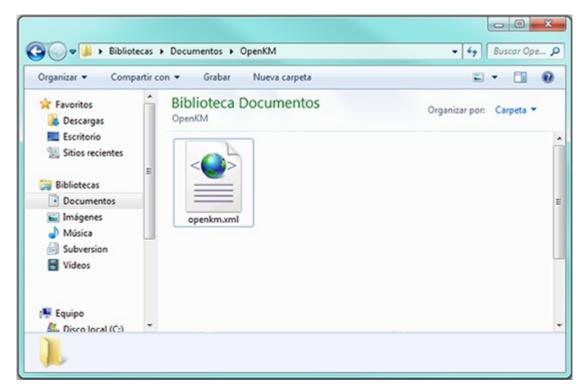
Configure OpenKM Add-In

First, you must select the **Configuration** menu item to set your configuration values to access OpenKM from the client computer.

Property	Туре	Description	
Language	Select	Ms Addin user interface language.	
User	String	User id for accessing OpenKM.	
Password	String	The password of the user.	

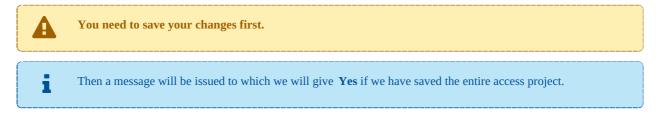
Host	String	OpenKM url.		
		https://demo.openkm.com/OpenKM/		
Add metadata	Bool	To enable/disable metadata selection form.		

After you set your configuration values, a folder named **OpenKM** is created in your user **My documents folder**. In this OpenKM folder, a configuration file named **openkm.xml** and another file named **document.xml** are created. The OpenKM Add-in it uses to store some document editing information. You should not edit or delete these files.



Uploading a new file

Click on the 🛃 upload button, a folder tree view will be shown. You must select the destination folder where you want to upload the file.



Now you can choose the folder where you want to upload the file.

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() Navigation tree		
Context Taxonomy	▼ Refresh Search	Upload Cancel
ekm.root		

Click on the **Upload** Button and after that, the document will be uploaded to OpenKM and a notification message will be shown

"File has been send successfully".

In case the file **already exists** in the repository, a pop-up window will be shown indicating that the file already exists. If we want to update it, press the **YES button** and the file will be updated with a new version.

Log

In My Documents/OpenKM there's a file log called AccessAddin.log with a complete log trace.

Project Add-in 7.1.x

Project Addin enables users to upload new files and edit existing OpenKM files.

To upload a new file, choose a destination folder from the OpenKM tree view.

The OpenKM Project Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.



Office Add-ins are compatible from version 2003 to version 2019.

After installing the Project add-in, a new menu item "OpenKM" will appear in Project.

```
🚯 Configuration 🔒 Upload 📝 Edit 📄 Check-in 📄 Cancel 🛞 Help
```

Detail of the functions according to their icons:

Button	Action	
۲	Addin configuration.	
	Add new document	
	Document edit (check-out)	
	Upload modified document (check-in)	
	Cancel document edit	
0	Help	

Configure OpenKM Add-in

First, you must select the **Configuration** menu item to set your configuration values to access OpenKM from the client computer.

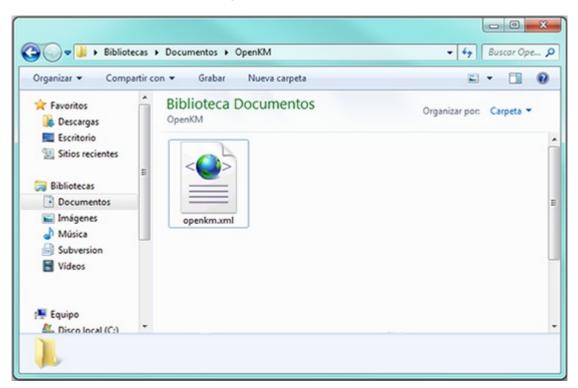
Property	Туре	Description
Language	Select	MS Addin user interface language.

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Microsoft Addin

User	String	User id for accessing OpenKM.
Password	String	The password of the user.
Host	String	OpenKM url. https://demo.openkm.com/OpenKM/
Add metadata	Bool	To enable/disable metadata selection form.

After you set your configuration values, a folder named **OpenKM** is created in your user **My documents folder**. In this OpenKM folder, a configuration file named **openkm.xml** and another file named **document.xml** are created. The OpenKM Add-in it uses to store some document editing information. You should not edit or delete these files.



Uploading a new file

Click on the add new document button, a folder tree view will be shown. You must choose the folder where you want to upload the file.

Page 51 of 127

() Navigation tree			
Context Taxonomy	▼ Refresh Search	Upload	Cancel
ekmiroot			

Click on the Send Button and after that, the document will be uploaded to OpenKM and a notification message will be shown.

Document has been send successfuly
Aceptar

If you have activated the option "Add metadata" in the configuration, it will allow to select and fill in the corresponding data. In case of having multiple selection metadata to mark and unmark all options, you can use the key combination "Ctrl" + "E" and "Supr" respectively.

Editing an OpenKM document

Click on the document edit button, a folder navigator will appear. You must navigate across folders and choose a document that you want to edit.

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🚯 Search							
Taxonomy -	Search	n folder	Sear	ch document	Edit		Exit
E-Cr okm root				Name	Author	Version	
MSAccess MSproject TESTING				TestProject.mpp	okmAdmin		1.0

When you've got some OpenKM document opened, the **Upload modified document** (check-in) and **Cancel document edit** toolbar options will be enabled.

• **To upload the modified document**, use the Upload modified document (check-in) toolbar button.

OpenKM	×
Enter a comment for the	version
new version	
Major minor version	
	OK Cancel

Insert a comment for the version and press the **OK** button.

• To cancel document editing, use the 📮 Cancel document edit toolbar button.

After editing, your local document copy will be deleted to prevent user mistakes.

Log

In **My Documents/OpenKM** there's a file log named ProjectAddin.log with a complete log trace.

User guide version 6.2.x

Oulook Add-in

Outlook Add-in enables users to select several emails and import content and attachments to OpenKM.

Importing mail creates a folder structure based on received email date (year/month/day folder structure) and imports into the mail content OpenKM mail tab view.

Word Add-in

Word Add-in enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM Word Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.

Excel Add-in

Excel Add-in enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM Excel Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.

PowerPoint Add-in

PowerPoint Add-in enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM PowerPoint Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.

Visio Add-in

Visio Add-in enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM Visio Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.

Access Add-in

Access Add-in allows users to upload new files to OpenKM.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM Access Add-in will be visible once a database is opened.

Project Add-in

Project Add-in enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM Project Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.

Outlook Add-in

• Outlook addin enables users to select several emails and import them into OpenKM among other actions.

After installing the Outlook add-in, a new menu item "OpenKM" will appear in Outlook.

	Configuration	🔒 Import	Import only attachments	🔞 Help	-
--	---------------	----------	-------------------------	--------	---

Detail of the functions according to their icons:

Button	Action		
٨	Addin configuration.		
	Import mail.		
I	Import only attachments.		
Θ	Help.		

Configure OpenKM Add-In

First, you must select the **Configuration** menu item to set your configuration values to access OpenKM from the client computer.

Property	Туре	Description
Language	Select	Ms Addin user interface language.
User	String	User id for accessing OpenKM. okmAdmin
Password	String	The password of the user.
Attachment path	String	OpenKM path where will be stored the intercepted attachment when the user is sending an email.

Page	57	of	127
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Bool	To enable/disable metadata selection form.
Select	 Choose the behaviour when the user send an email with attachments. Never do anything Ask if you want to intercept and import into OpenKM. Always intercept and import into OpenKM.
	When OpenKM intercepts an attachment, it is imported to OpenKM and replaced into the sent email by and OpenKM URL of the document (attachment imported).
Checkbox	Enable or disable activity log of intercepted attachments.
	This feature is only available when OpenKM is working with MySQL or MariaDB database.
	Checkbox

When you set your configuration values, a folder called **OpenKM** is created in your user **My documents folder**.In this OpenKM folder, a configuration file named **openkm.xml** and another file named **document.xml** are

created. The OpenKM Add-in uses to store some document editing information. You should not edit or delete these files.

Importing emails to OpenKM

The user can import emails from Outlook to OpenKM in three ways:



- 1. Select the option "Import" in the OpenKM toolbar.
- 2. Dragging the mail to a folder inside the **OpenKM navigator tree** in the left panel.
- 3. Right click on the mail and choose the option "import" inside the menu OpenKM.

i

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Bandeja de entrada - Microsoft Outlook				
Archivo Edición Ver Ir Herramient				
🔂 Nuevo 🔹 🍰 🗎 🗙 🗠 Responder				Buscar en libr
🧐 🎯 Atrás 💿 🗖 📙 💁 🤊 🙆	Mensajes		• 🗇 🖓 🍕 🖕	
Configuration 🕞 Import 🖉 Import o	nly attachments 🔞 He	lp 📮		
Correo 1	« 🔄 Bande	eja de ent	trada	test
Carpetas favoritas	Buscar Bande	ja de entrada	: • ۹	Pablo Herre
Bandeja de entrada (1048)	Organizado p	or: Fecha	Más nuevo encima 👻	Enviado: miéro Para: ph@g
Carpetas de correo	A E Hoy			Mensaje
Todos los elementos de correo	Y 🖂 Pablo He	rrera	15:43	
Carpetas personales Bandeia de entrada (1048)	test		Abrir	
~		1	Imprimir	Mail test
Correo		2	Responder	
Calendario		2	Responder a todos	
		2	Reenviar	
CopenKM 200	*		Ver datos adjuntos	
Context			Seguimiento >	
Taxonomy	3		Clasificar +	
Grouped			Marcar como leído	
B-Con okm root			Buscar todos >	
2016		-	Crear regla	
L-Con test		-	Correo electrónico no deseado >	
			-	
		~	ESET Smart Security	
		×	Eliminar	
		-23	Mover a una carpeta	3
			Opciones de mensajes	_
			OpenKM 🕨 📘	Import
1114 elementos			4	Import only attac

In cases one and three then you must select the destination path to import the mail.

When **grouped checkbox is checked** will be **added** at the end of the path the subfolder **Year/Month/Day**.

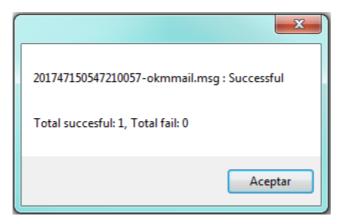
That means if you have choosen destination path "/**okm:root/email**" and grouped checkbox is checked the destination path will be "/**okm:root/email/2017/03/24**" (sample based in actual date value as " **2017/03/24**").

Page 59 of 127

() Navigatio	on tree	
Context Taxonomy	Refresh Search Upload Cancel	
⊡- 🤤 okm: - 🤤 2 - ເ	2016	
-	you have activated the option " Add metadata" in the configuration , it will allow you to select and rresponding data.	l fill in the
In	the case of having multiple selection metadata to mark and unmark all options, you can use the	key

combination "**Ctrl**" + "**E**" and "**Supr**" respectively.

After importing is finished, a message indicating the number of emails and attachments imported will be displayed.



Importing attachments to OpenKM

The user can import attachments from Outlook to OpenKM in two ways:

V

To import attachments, first select one email.

- 1. Select the option "Import only attachments" in the OpenKM toolbar.
- 2. Right click on the mail and choose the option to "Import only attachments" inside the menu OpenKM.

<u>Archivo Edición Ver Ir</u> <u>H</u> erramie	entas Acci	ones ?					
🔂 Nuevo 🔹 🚓 🖓 🗙 🗛 Respond	ler 🖓 Resp	oonder a todos 🛛 🔒 <u>R</u>	eenvia	ar 🛛 🔡 🦞 📑 Enviar y regibir 🔹		Buscar en li	ibreta
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Configuration 🕞 Import 🖉 Import	t only attach	ments 🚱 Help 🖕					
Correo	1 «	🔄 Bandeja d	e en	trada		test	
Carpetas favoritas	*	Buscar Bandeja de e	ntrad	a p	• *	Pablo Her	rrera
Bandeja de entrada (1048)		Organizado por: Feo	ha	Más nuevo encima	-	Enviado: miércole Para: ph@gmai	
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Todos los elementos de correo	-	🖂 Pablo Herrera		15:43	Ŷ		12
Carpetas personales Bandeia de entrada (1048)	¢	test	4	Abrir Imprimir	ŀ	Mail tes	st
Correo	_			Responder Responder a todos			
·····			0	Reenviar			
OpenKM	*			Ver datos adjuntos			
Context Taxonomy	•			Seguimiento			
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- Cr okm root				Buscar todos			
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				Correo electrónico no deseado >			
				ESET Smart Security			
			×	Eliminar			
			6	Mover a una carpeta			
				Opciones de mensajes			2
				OpenKM +		Import	-

0		
	Attachment	
	test.pdf	
	Next	Cancel

Check the attachments to be imported and click the **next** button to finish.

After importing is finished, a message indicating the attachments imported will be displayed.

Add attachments from openkm to a new mail

The user can add attachments from OpenKM.

- 1. First we click the **New** button to create a new mail.
- 2. Press the **Add attachment** button, it will show the file explorer inside OpenKM from which you might select one or more documents that you want to attach into the mail and then press the **select** button.
- 3. You can view the attachments in the compose mail section for it.

Page 62 of 127

Microsoft Addin

S Outlook para hoy - Microsoft Outlook
Archivo Edición Ver Ir Herramientas Acci <u>o</u> nes ?
🔁 Nuevo 🔹 🚔 📑 Enviar y recibir 🔹 🔛 Buscar en libretas 🔹 🔹 🎯 🖕
: 💱 🕲 Atrás 🕲 🔁 🔚 🔊 👔 💂
Configuration GImport only attachments 🚱 Help
Correo 🕞 🐨 🔨 🗢 🗢 🖛 test attahments - Mensaje (HTML) 🗖 💷 🛽 🔊
Carpetas far Mensaje Insertar Opciones Formato de texto OpenKM
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P Todos lo
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S Contac
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Taxonomy Adjunto: Image: Taxonomy Adjunto: Image: Taxonomy Adjunto: Image: Taxonomy
Grouper test mail
E-Cit okm
Finalizado

Log

In **My Documents/OpenKM** there's a file log called OutlookAddin.log with a complete log trace.

Intercept attachment

First, you must select the **Configuration** menu item to set your configuration values to access OpenKM from the client computer.

Property	Туре	Description
Attachment path	String	OpenKM path where will be stored the intercepted attachment when the user is sending an email.
Intercept attachment	Select	 Choose the behaviour when the user send an email with attachments. Never do anything Ask if you want to intercept and import into OpenKM. Always intercept and import into OpenKM. When OpenKM intercepts an attachment, it is imported to OpenKM and replaced into the sent email by and OpenKM URL of the document (attachment imported).
Enable attachment log	Checkbox	Enable or disable activity log of intercepted attachments. Image: A state of the st

Once **configured**, create a **new mail** with some attached files and we **send** it.

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Microsoft Addin

	<u>ت</u> ۳ و	▲ ৵ €	te	est - Mensa	je (HTML)				x
	Mensaje	Insertar	Opciones F	ormato de t	exto Op	enKM			۲
Pegar • Portapapo	11 N 3	libri (Cuerpo) K <u>S</u> C <u>A</u> → E Texto b	• : : : : : : : : : : : : : : : : : : :	Nombres	U ₽▼ U Incluir S	Seguimiento Opciones	 ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ 	ABC Revisión ortográfica * Revisión	
Enviar	De Para CC CCO Asunto: Adjunto:	pherrera@op	enkm.com; 701 KB); test.do	осх (10 КВ);					
Interce	ept attachr	<u>ment</u> test							

The attachment it is imported into OpenKM and the mail attachment is replaced on fly by OpenKM URL of the document (attachment imported).

In case you have selected the **Ask** or **Always** option of the **Intercept attachment** feature and the **Enable attachment log** feature is **activated**, it will be stored in the database a log of mail with senders and date.

roundcube 🍣	
Volver Redactar Responder P Entrada 15 Borradores Enviados Papelera	Responder a Reenviar Eliminar Mover Imprimir Marcar Más test De Destinatario Pablo Herrera 1* pherrera@openkm.com 1* Hoy 16:46 Intercept attachment test Documents attached out.pdf test.docx Out.pdf test.docx

If you click in the OpenKM URL of the document you will be directed to the location of the document into OpenKM.

OpenKM	×	+	1	-	-	
(i) localhost:8080/OpenKM/f	ronter	nd/ind C	Q B	luscar	☆ 自 🗣	☆ ♡
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📇 Taxonomía		Ruta : /okm:root/te	est /2017	//03/24/		
⊖ 🗁 test	*			Nombre	Título	Idioma
E 🗁 2017			-	out.pdf		
🖻 🗁 03				test.docx		
24						

Word Add-in

Word Add-in enables users to upload new files and edit existing OpenKM files.

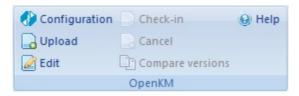
When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM Word Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.



Office Add-ins are compatible from version 2000 to version 2019.

After installing the Outlook add-in, a new menu item "OpenKM" will appear in Outlook.



Detail of the functions according to their icons:

Button	Action
۲	Addin configuration.
	Add new document
	Document edit (check-out)
	Upload modified document (check-in)
	Cancel document edit
Đ	Compare versions
0	Help

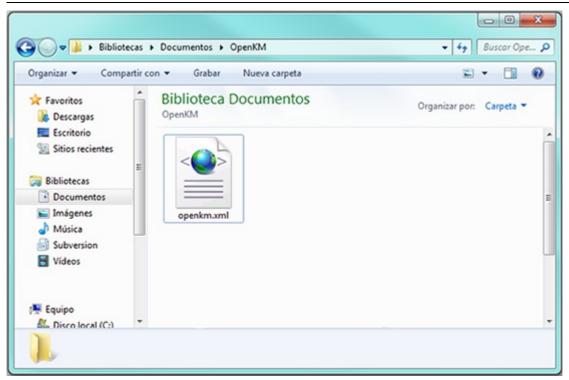
Configure OpenKM Add-In

Created in 2016 by OpenKM. OpenKM documentation is provided under OpenKM documentation license.

First, you must choose the **Configuration** menu item to set your configuration values to access OpenKM from the client computer.

Property	Туре	Description
Language	Select	Ms Addin user interface language.
User	String	User id for accessing OpenKM.
Password	String	The password of the user.
Host	String	OpenKM url. https://demo.openkm.com/OpenKM/
Add metadata	Bool	To enable/disable metadata selection form.

After you set your configuration values, a folder called **OpenKM** is created in your user **My documents folder**. In this OpenKM folder, a configuration file called **openkm.xml** and another file called **document.xml** are created that the OpenKM Add-in uses to store some document editing information. You should not edit or delete these files.



Uploading a new file

Click on the add new document button, a folder tree view will be shown. You must select the folder where you want to upload the file.

Page 69 of 127

() Navigation tree			x
Context Taxonomy	Refresh Search	Upload Cancel	
ekminoot			

Click on the Upload button and after that, the document will be uploaded to OpenKM and a notification message will be shown.

	x
Document has been send successfuly	
Acepta	r

If you have activated the option "**Add metadata**" in the configuration, it will allow you to select and fill in the corresponding data.

In the case of having **multiple selection metadata** to **mark** and **unmark** all options, you can use the key combination "**Ctrl**" + "**E**" and "**Supr**" respectively.

Editing an OpenKM document

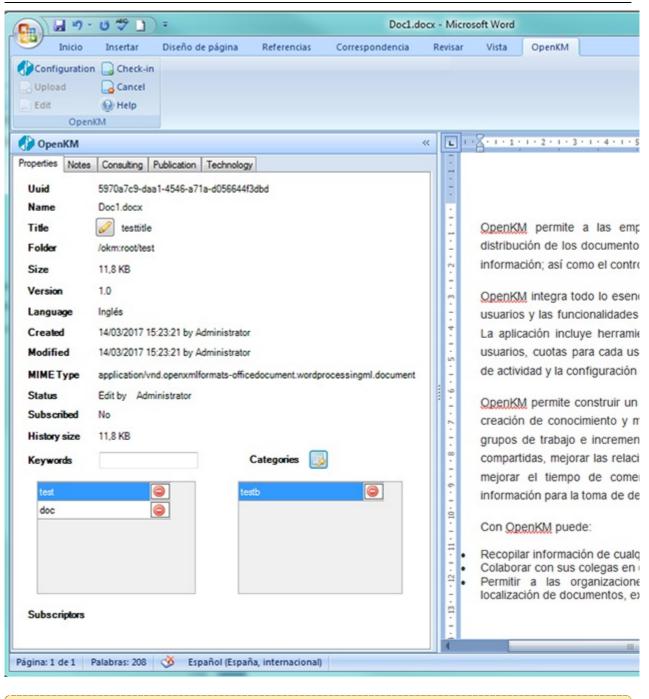
i

Clicking on the *locument edit button, a folder navigator will be shown.* You must navigate across folders and select a document that you want to edit.

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Faxonomy 👻	Search folder	Search document	Edit
⊡		Name	Author
test Doc1.docx	okmAdmin		
	e 1997	Doc2.docx	okmAdmin
	J. J	OKMPdf-000002.pdf	okmAdmin

When you've got some OpenKM document opened, the **Upload modified document** (check-in) and **Cancel document edit** toolbar options will be enabled.



In the left panel, you can view the properties, notes, relations, and metadata of the document.

Notes tab

Ω

Page	72	of	127
1 age	12	O1	12/

operties Notes	Relations Consulting	Publication	Technology			
Author	Text		Date			
Administrator	My note 1		17/07	/2018 9:39	Ş	٢
Administrator	My note 2		17/07	/2018 9:39	Ş	٢
		Add note				

Relations tab

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1 Open/M		4
OpenKM	Peletiana o te la te e la te	
	Relations Consulting Publication Technology	
Relation type	Equivalent 💌	ĥ
Relation	Bidirectional 1 🔹 🚵 💼	
BIDIRECTION	IAL RELATIONS	
Bidirectional 1	a.docx	
Bidirectional2	b.docx	
PARENT-CHIL	LD RELATIONS	
Child	E test xlsx	E
Parent	Invoice.pdf	
GROUP RELAT	TIONS 🏙	
	TIONS #	
Group1 - A		
Group 1 - A 🧷 🥥		
Group 1 - A Group 1 - A	ABC.docx 🤤 📄 testing.docx 🤤	
Group 1 - A) 🚔 🏥 🍋	
Group 1 - A	ABC.docx 🤤 📄 testing.docx 🤤	
Group 1 - A	ABC.docx 🤤 📄 testing.docx 🤤	
Group 1 - A	ABC.docx 🤤 📄 testing.docx 🤤	
Group 1 - A	ABC.docx 🤤 📄 testing.docx 🤤	
Group 1 - A	ABC.docx 🤤 📄 testing.docx 🤤	

Metadata tab

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Microsoft Addin

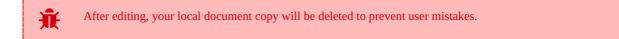
🌖 OpenKM		~
Properties Note	s Relatio s Consulting Publication Technology	
Name	Test	
Date 1	7/07/2018 🔲 🖛	
Important 🔽		
Comment 7	Any comment	
	Update Remove	

• To upload a modified document, use the 🔲 Upload modified document (check-in) toolbar button.

OpenKM X	
Enter a comment for the version	
new version	
Major minor version	
OK Cancel	

Insert a comment for the version and press the **OK** button.

• To cancel document edition, use the 📴 Cancel document edit toolbar button.



Compare versions

Clicking on the "Compare versions" button will display the version history in a pop-up allowing you to select a version to compare with.

	You must first The compariso								abled . n document just c	lose this v	vindow.
G	100-0700) =		Invoice	1_7_v1.26.d	ocx - Micro	soft	Wo	rd		
100		iseño de página	Referencias C	orrespondencia	Revisar	Vista	Nu	and	e OCR OpenKM		
Ott	BC Referencia Mor Sinónimos So amática Sinónimos Revisión	Nuevo comentarios	terior uiente Control de cambios *	Globos	cas mostrada rar marcas * I de revisione iniento			•	Aceptar Cambios	*	lostrar documento de origen ~
>>	Resumen: 7 revisiones 🔐 👻	Documento com	nparado (Invoice1_7.o	focx)			x	D	ocumento original (Invoi	cel_7.docx - D	XD)
OpenKM 📀	Cambios y comentarios del documento principal Insertado DXD		Cliente:				Imagen S.A. Perez CIF: B12578945 Av. Paraiso, Nº 123 Granada, España				
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Log

In **My Documents/OpenKM** there's a file log called WordAddin.log with a complete log trace.

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Excel Add-in

Excel Add-in enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM Excel Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.



After installing the Outlook add-in, a new menu item "OpenKM" will appear in Outlook.

```
🚱 Configuration 🔒 Upload 📝 Edit 📄 Check-in 📄 Cancel 🛞 Help
```

Detail of the functions according to their icons:

Button	Action
۲	Addin configuration.
	Add new document
	Document edit (check-out)
	Upload modified document (check-in)
	Cancel document edit
0	Help

Configure OpenKM Add-In

First, you must select the **Configuration** menu item to set your configuration values to access OpenKM from the client computer.

Property	Туре	Description
Language	Select	Ms Addin user interface language.

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Microsoft Addin

User	String	User id for accessing OpenKM.
Password	String	The password of the user.
Host	String	OpenKM url. https://demo.openkm.com/OpenKM/
Add metadata	Bool	To enable/disable metadata selection form.

After you set your configuration values, a folder called **OpenKM** is created in your user **My documents folder**. In this OpenKM folder, a configuration file called **openkm.xml** and another file called **document.xml** are created that the OpenKM Add-in uses to store some document editing information. You should not edit or delete these files.



Uploading a new file

Click on the 🛃 add new document button, a folder tree view will be shown. You must select the folder where you want to upload the file.

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() Navigation tree			
Context Taxonomy	▼ Refresh Search	Upload	Cancel
ekmiroot			

Click on the Upload button and after that, the document will be uploaded to OpenKM and a notification message will be shown.

×	
Document has been send successfuly	
Aceptar	

If you have activated the option "**Add metadata**" in the configuration, it will allow you to select and fill in the corresponding data.

In the case of having **multiple selection metadata** to **mark** and **unmark** all options, you can use the key combination "**Ctrl**" + "**E**" and "**Supr**" respectively.

Editing an OpenKM document

i

Click on the *locument edit button, a folder navigator will appear.* You must navigate across folders and select a document that you want to edit.

() Search						
Taxonomy -	Sei	arch folder		Search document	Edit	
E-Con okm.root				Name	Author	Version
- 2016 			•	test.pptx	test2	1.1
	Þ			test xlsx	okmAdmin	4.0
			9	test2.docx	okmAdmin	3.0

When you've got some OpenKM document opened, the **Upload modified document** (check-in) and **Cancel document edit** toolbar options will be enabled.

• To upload a modified document, use the Upload modified document (check-in) toolbar button.

OpenKM X	J
Enter a comment for the version	
new version	
Major minor version	
OK Cancel	

Insert a comment for the version and press the **OK** button.

• To cancel document editing, use the 📴 Cancel document edit toolbar button.

After editing, your local document copy will be deleted to prevent user mistakes.

Log

In My Documents/OpenKM there's a file log called ExcelAddin.log with a complete log trace.

PowerPoint Add-in

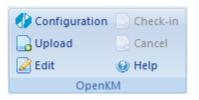
PowerPoint Addin enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM PowerPoint Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.

Office Add-ins are compatible from version 2000 to version 2019.

After installing the PowerPoint add-in, a new menu item "OpenKM" will appear in PowerPoint .



Detail of the functions according to their icons:

Button	Action
	Addin configuration.
	Add new document
	Document edit (check-out)
	Upload modified document (check-in)
	Cancel document edit
0	Help

Configure OpenKM Add-In

First, you must select the **Configuration** menu item to set your configuration values to access OpenKM from the client computer.

Property	Туре	Description
Language	Select	Ms Addin user interface language.
User	String	User id for accessing OpenKM.
Password	String	The password of the user.
Host	String	OpenKM url. https://demo.openkm.com/OpenKM/
Add metadata	Bool	To enable/disable metadata selection form.

After you set your configuration values, a folder called **OpenKM** is created in your user **My documents folder**. In this OpenKM folder, a configuration file called **openkm.xml** and another file called **document.xml** are created that the OpenKM Add-in uses to store some document editing information. You should not edit or delete these files.

Organizar 🔻 Compartir	con 👻 Grabar Nueva carpeta	s • 🖬 (
☆ Favoritos ↓ Descargas	Biblioteca Documentos	Organizar por: Carpeta 🕶
Escritorio		
Bibliotecas Documentos		
Imágenes Música	openkm.xml	
Subversion		

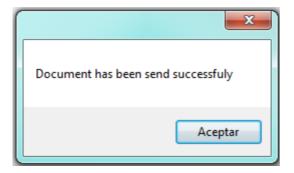
Uploading a new file

Created in 2016 by OpenKM. OpenKM documentation is provided under OpenKM documentation license.

Click on the 🛃 add new document button, a folder tree view will be shown. You must select the folder where you want to upload the file.

() Navigation tree		
Context	Refresh Search	Upload Cancel
e- left okm:root eff 2016 eff test		

Click on the Upload button and after that, the document will be uploaded to OpenKM and a notification message will be shown.



1 If you have activated the option "**Add metadata**" in the configuration, it will allow you to select and fill in the corresponding data.

In the case of having **multiple selection metadata** to **mark** and **unmark** all options, you can use the key combination "**Ctrl**" + "**E**" and "**Supr**" respectively.

Editing an OpenKM document

Click on the 🖉 document edit button, a folder navigator will appear. You must navigate across folders and select a document

that you want to edit.

axonomy	✓ Search	h folder	Search document	Edit	
e 🔄 okm.root			Name	Author	Version
- 2016		•	test.pptx	test2	1.1
test		2	test xdsx	okm.Admin	4.0
		1	test2.docx	okm.Admin	3.0

When you've got some OpenKM document opened, the **Upload modified document** (check-in) and **Cancel document** edit toolbar options will be enabled.

• To upload a modified document, use the Upload modified document (check-in) toolbar button.

OpenKM	×
Enter a comment for the vers	sion
new version	
Major minor version	OK Cancel

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Insert a comment for the version and press the **OK** button.





Log

In My Documents/OpenKM there's a file log called PowerPointAddin.log with a complete log trace.

Visio Add-in

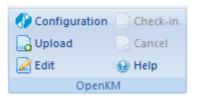
Visio Addin enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM Visio Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.



After installing the Visio add-in, a new menu item "OpenKM" will appear in Visio.



Detail of the functions according to their icons:

Button	Action
۲	Addin configuration.
	Add new document
	Document edit (check-out)
	Upload modified document (check-in)
	Cancel document edit
0	Help

Configure OpenKM Add-In

First, you must select the **Configuration** menu item to set your configuration values to access OpenKM from the client computer.

Property	Туре	Description
Language	Select	Ms Addin user interface language.
User	String	User id for accessing OpenKM. okmAdmin
Password	String	The password of the user.
Host	String	OpenKM url. https://demo.openkm.com/OpenKM/
Add metadata	Bool	To enable/disable metadata selection form.

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After you set your configuration values, a folder called **OpenKM** is created in your user **My documents folder**. In this OpenKM folder, a configuration file called **openkm.xml** and another file called **document.xml** are created that the OpenKM Add-in uses to store some document editing information. You should not edit or delete these files.

Biblioteca Documentos	Organizar por: Carpeta 🔻
openkm.xml	
	OpenKM

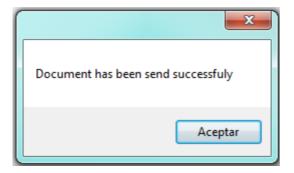
Uploading a new file

Created in 2016 by OpenKM. OpenKM documentation is provided under OpenKM documentation license.

Click on the 🛃 add new document button, a folder tree view will be shown. You must select the folder where you want to upload the file.

() Navigation tree				
Context	Refresh	Search	Upload	Cancel
e-Contract 2016 Contract test				

Click on the **Upload** button and after that the document will be uploaded to OpenKM and a notification message will be shown.



1 If you have activated the option "**Add metadata**" in the configuration, it will allow you to select and fill in the corresponding data.

In the case of having **multiple selection metadata** to **mark** and **unmark** all options, you can use the key combination "**Ctrl**" + "**E**" and "**Supr**" respectively.

Editing an OpemKM document

Click on the 🖉 document edit button, a folder navigator will appear. You must navigate across folders and select a document

that you want to edit.

Search	h folder	Search document	Edit	
		Name	Author	Version
Þ		test.vsd	test2	1.1
	2	test xlsx	okm.Admin	4.0
	1	test2.docx	okm.Admin	3.0
			► Name ► Est.vsd Est.vsd ► test.vss	Name Author Itest.vsd test2 Itest.vsd okmAdmin

When you've got some OpenKM document opened, the **Upload modified document** (check-in) and **Cancel document** edit toolbar options will be enabled.

• To upload modified document, use the Upload modified document (check-in) toolbar button.

OpenKM 🚬	
Enter a comment for the version	
new version	
Major minor version]

Created in 2016 by OpenKM. OpenKM documentation is provided under OpenKM documentation license.

Insert a comment for the version and press the **OK** button.





Log

In My Documents/OpenKM there's a file log called PowerPointAddin.log with a complete log trace.

Access Add-in

Access Addin allows users to upload new files to OpenKM.

To upload a new file, choose a destination folder from the OpenKM tree view.

The OpenKM Access Add-in will be visible once a database is opened.



After installing the Access add-in, a new menu item "OpenKM" will appear in Access.



Detail of the functions according to their icons:

Button	Action
	Addin configuration.
	Upload file.
0	Help

Configure OpenKM Add-In

First, you must select the **Configuration** menu item to set your configuration values to access OpenKM from the client computer.

Property	Туре	Description	
Language	Select	Ms Addin user interface language.	
User	String	User id for accessing OpenKM.	
Password	String	The password of the user.	

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Host String		OpenKM url.	
		https://demo.openkm.com/OpenKM/	
Add metadata	Bool	To enable/disable metadata selection form.	

After you set your configuration values, a folder named **OpenKM** is created in your user **My documents folder**. In this OpenKM folder, a configuration file named **openkm.xml** and another file named **document.xml** are created. The OpenKM Add-in it uses to store some document editing information. You should not edit or delete these files.



Uploading a new file

Click on the 🛃 upload button, a folder tree view will be shown. You must select the folder where you want to upload the file.

	You need to save your changes first.	
i	Then a message will be issued to which we will give Yes if we have saved the entire access project.	

Now you can select the folder where you want to upload the file.

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() Navigation tree		
Context Taxonomy	▼ Refresh Search	Upload Cancel
ekm.root		

Click on the **Upload** Button and after that, the document will be uploaded to OpenKM and a notification message will be shown

"File has been send successfully".

In case the file **already exists** in the repository, a pop-up window will be shown indicating that the file already exists. If we want to update it, press the **YES button** and the file will be updated with a new version.

Log

In My Documents/OpenKM there's a file log named AccessAddin.log with a complete log trace.

Project Add-in

Project Addin enables users to upload new files and edit existing OpenKM files.

To upload a new file, choose a destination folder from the OpenKM tree view.

The OpenKM Project Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.



Office Add-ins are compatible from version 2003 to version 2019.

After installing the Project add-in, a new menu item "OpenKM" will appear in Project.

🚯 Configuration 🔒 Upload 📝 Edit 📄 Check-in 📄 Cancel 🛞 Help

Detail of the functions according to their icons:

Button	Action
	Addin configuration.
	Add new document
	Document edit (check-out)
	Upload modified document (check-in)
	Cancel document edit
0	Help

Configure OpenKM Add-In

First, you must select the **Configuration** menu item to set your configuration values to access OpenKM from the client computer.

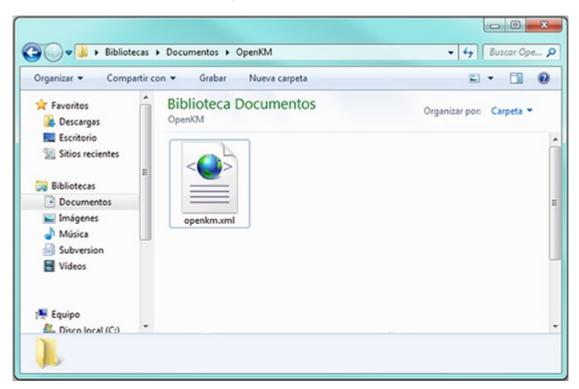
Property	Туре	Description
Language	Select	MS Addin user interface language.

Page 95 of 127

Microsoft Addin

User	String	User id for accessing OpenKM.	
Password	String	The password of the user.	
Host	String	OpenKM url. https://demo.openkm.com/OpenKM/	
Add metadata	Bool	To enable/disable metadata selection form.	

After you set your configuration values, a folder named **OpenKM** is created in your user **My documents folder**. In this OpenKM folder, a configuration file named **openkm.xml** and another file called **document.xml** are created. The OpenKM Add-in it uses to store some document editing information. You should not edit or delete these files.



Uploading a new file

Click on the 🛃 add new document button, a folder tree view will be shown. You must choose the folder where you want to upload the file.

Page 96 of 127

() Navigation tree		
Context Taxonomy	Refresh Search	Upload Cancel
e-Contract 2016 test		

Click on the Send Button and after that the document will be uploaded to OpenKM and a notification message will be shown.

×
Document has been send successfuly
Aceptar

If you have activated the option "Add metadata" in the configuration, it will allow you to select and fill in the corresponding data.
 In the case of having multiple selection metadata to mark and unmark all options, you can use the key combination "Ctrl" + "E" and "Supr" respectively.

Editing an OpenKM document

lick on the *occument edit button, a folder navigator will appear.* You must navigate across folders and choose a document that you want to edit.

Search folder	Search document	Edit	Exit
	Name	Author	Version
			1.0
	Search folder	Name	Name Author

When you've got some OpenKM document opened, the **Upload modified document** (check-in) and **Cancel document edit** toolbar options will be enabled.

• To upload modified document, use the Upload modified document (check-in) toolbar button.

OpenKM	×
Enter a comment for the	version
new version	
Major minor version	
	OK Cancel

Insert a comment for the version and press the **OK** button.

• To cancel document editing, use the 📮 Cancel document edit toolbar button.

After editing, your local document copy will be deleted to prevent user mistakes.

Log

In **My Documents/OpenKM** there's a file log named ProjectAddin.log with a complete log trace.

User guide version 6.1.x

Oulook Add-in

Outlook Add-in 6.1.x enables users to select several emails and import content and attachments to OpenKM.

Importing mail creates a folder structure based on received email date (year/month/day folder structure) and imports into the mail content OpenKM mail tab view.

Word Add-in

Word Add-in 6.1.x enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM Word Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.

Excel Add-in

Excel Add-in 6.1.x enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM Excel Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.

PowerPoint Add-in

PowerPoint Add-in 6.1.x enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM PowerPoint Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.

Outlook Add-in 6.1.x

Outlook addin enables users to select several emails and import content and attachments to OpenKM.

Importing mail creates a folder structure based on received email date (year/month/day folder structure) and imports into the mail content OpenKM mail tab view.



After installing the Outlook add-in, a new menu item "OpenKM" will appear in Outlook.



Detail of the functions according to their icons:

Button	Action
() Configuration	Addin configuration.
	Import mail.
Ũ	Help

Configure OpenKM Add-In

First you must select the **Configuration** menu item to set your configuration values to access OpenKM from the client computer.

Users of OpenK I option.	M version 6.3.x shoul	d use " Webservice	e s 1.0 " option in	n the OpenK	M version configu	ration
() Configuration					×	
-	OpenKM Version	Pro 6.2+	 Language 	English	•	
	User	user1]		
	Password	•••••				
	Host	http://demo.open	km.comOpenKM	1/		

Accept

Cancel

Test

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After you set your configuration values, a folder called **OpenKM** is created in your user **My documents folder**. In this OpenKM folder, a configuration file called **openkm.xml** and another file called **document.xml** are created that the OpenKM Add-in uses to store some document editing information. You should not edit or delete these files.

ar Nueva carpeta	Organizar por: Carpeta 🕶	0
	Organizar por: Carpeta 🔻	
		- 1
haml		

Importing emails to OpenKM

After configuration is done, the user can import emails from Outlook to OpenKM. To import emails, first select one or more emails and then select the Import mail into OpenKM option menu.

Page 102 of 127

Archivo Edición Ver Ir Herramienta:			
🔂 Nuevo 🔹 🚓 🎦 🗙 🖓 Responder	🙈 Res	oon <u>d</u> er a todos 🛛 🙈 <u>R</u> eenviar 🛛 🏪 🤎	🛛 📑 Enviar y re <u>c</u> ibir 👻 🛄 🛛 B
🧐 🕲 Atrás 🛞 🗖 📙 🔍 🤊 🚊	Mens	jes 🗾 🗗 🗗	1 💐 📮
() Configuration 🕞 Import () Help 👳			
Correo 2	~	🔄 Bandeja de entrada	
Carpetas favoritas	*	Buscar Bandeja de entrada	\$ • ۹
Bandeja de entrada (1047) Elementos enviados		Organizado por: Fecha	Más nuevo encima 🚽 📥
Carpetas de correo	*	miércoles	
Todos los elementos de correo	•	🖂 Pablo Herrera	miércoles 15:43
Carpetas personales	-	test	
Bandeja de entrada (1047) Bandeja de salida		martes	
Borrador [4]			
Correo electrónico no deseado [27]			
Elementos eliminados (3)	-		
Particular conjuder			
Correo			
2 Calendario			
Contactos			
🟹 Tareas			
Notas			
Lista de carpetas			
	- 5		

Then you must select the path where the mail will import and press the **upload** button.

Page 103 of 127

 Navigation tree 			
Context Taxonomy	Refresh Search	Upload	Cancel
ekminoot 2016 test			

After importing is finished, a message indicating the number of emails and attachments imported will be displayed.

Log

In **My Documents/OpenKM** there's a file log called OutlookAddin.log with a complete log trace.

Word Add-in 6.1.x

Word Add-in enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM Word Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.



Office Add-ins are compatible from version 2000 to version 2013.

After installing the Outlook add-in, a new menu item "OpenKM" will appear in Outlook.

() Configuration	Check-in	
🔒 Upload	🔄 Cancel	
🛃 Edit	🚺 Help	
OpenKM		

Detail of the functions according to their icons:

Button	Action
() Configuration	Addin configuration.
	Add new document
	Document edit (check-out)
	Upload modified document (check-in)
	Cancel document edit
<u>0</u>	Help

Configure OpenKM Add-In

First you must select the OpenKM tool bar option to set your configuration values to access OpenKM from the client computer. If you've got other OpenKM Add-Ins already installed, this may not be needed.

Users of OpenK option.	X M version 6.3.x shoul	d use " Webser	vices 1.	0 " option in	n the OpenK	CM version configura
() Configuration						x
6	OpenKM Version User	Pro 6.2+ user1	Ŧ	Language	English	•
Password Host	+++++	openkm.	comOpenKN) V	_	
		Accept		Cancel	T (est

When you set your configuration values, a folder called **OpenKM** is created in your user **My documents folder**. In this OpenKM folder, a configuration file called **openkm.xml** and another file called **document.xml** are created that the OpenKM Add-in uses to store some document editing information. You should not edit or delete these files.

Organizar 🔻 Compa	rtir con 👻 Grabar Nueva carpeta	■ • □ (
🛠 Favoritos	Biblioteca Documentos OpenKM	Organizar por: Carpeta 🔻
Escritorio Sitios recientes Bibliotecas	E	
Documentos Imágenes Música	openkm.xml	
Subversion		
💺 Equipo		
A Disco local (C:)	*	

Uploading a new file

Click on the add new document button, a folder tree view will be shown. You must select the folder where you want to upload the file.

Page 106 of 127

() Navigation tree			
Context Taxonomy	Refresh Search	Upload	Cancel
⊡- 🤄 okm:root - 😋 2016 - 😂 test			

Click on the Send Button and after that the document will be uploaded to OpenKM and a notification message will be shown.

X
Document has been send successfuly
Aceptar

Editing an OpenKM document

Click on the *locument* edit button, a folder navigator will appear. You must navigate across folders and select a document that you want to edit.

Taxonomy -	Search folder		Search document	Edit
e			Name	Author
2016 test		- D	Doc1.docx	okmAdmin
		1	Doc2.docx	okmAdmin
		A	OKMPdf-000002.pdf	okmAdmin

When you've got some OpenKM document opened, the **Upload modified document** (check-in) and **Cancel document edit** toolbar options will be enabled.

- To upload modified document, use the Upload modified document (check-in) toolbar button.
- To cancel document editing, use the 📮 Cancel document edit toolbar button.



Log

In My Documents/OpenKM there's a file log called WordAddin.log with a complete log trace.

Excel Add-in 6.1.x

Excel Add-in enables users to upload new files and edit existing OpenKM files.

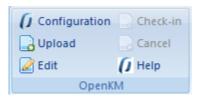
When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM Excel Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.



Office Add-ins are compatible from version 2000 to version 2013.

After installing the Outlook add-in, a new menu item "OpenKM" will appear in Outlook.



Detail of the functions according to their icons:

Button	Action
() Configuration	Addin configuration.
	Add new document
	Document edit (check-out)
	Upload modified document (check-in)
	Cancel document edit
Ũ	Help

Configure OpenKM Add-In

First you must select the OpenKM tool bar option to set your configuration values to access OpenKM from the client computer. If you've got other OpenKM Add-Ins already installed, this may not be needed.

Users of OpenKM version 6 . option.	3.x should use "Webse	rvices 1.0 " option in	the OpenK	M version configuration
() Configuration				×
OpenKM	Version Pro 6.2+	 Language 	English	•
User	user1			
Password		openkm comOpenKM	1/	

When you set your configuration values, a folder called **OpenKM** is created in your user **My documents folder**. In this OpenKM folder, a configuration file called **openkm.xml** and another file called **document.xml** are created that the OpenKM Add-in uses to store some document editing information. You should not edit or delete these files.

Accept

Cancel

Test

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Sitios recientes	E	
Documentos		
Imágenes Música	openkm.xml	
Subversion Videos		
🛒 Equipo		
A Disco local (C:)	*	

Uploading a new file

Click on the add new document button, a folder tree view will be shown. You must select the folder where you want to upload the file.

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() Navigation tree		
Context Taxonomy	Refresh Search	Upload Cancel
ekm:root		

Click on the Send Button and after that the document will be uploaded to OpenKM and a notification message will be shown.

X
Document has been send successfuly
Aceptar

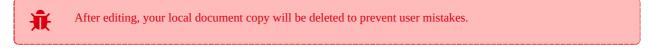
Editing an OpenKM document

Click on the *odcument* edit button, a folder navigator will appear. You must navigate across folders and select a document that you want to edit.

Taxonomy	 Search 	folder	Search document	Edit	
E-C okm.root			Name	Author	Version
		•	test.pptx	test2	1.1
	•	2	test xlsx	okmAdmin	4.0
		1	test2.docx	okmAdmin	3.0

When you've got some OpenKM document opened, the **Upload modified document** (check-in) and **Cancel document edit** toolbar options will be enabled.

- To upload modified document, use the Upload modified document (check-in) toolbar button.
- To cancel document editing, use the 📮 Cancel document edit toolbar button.



Log

In My Documents/OpenKM there's a file log called ExcelAddin.log with a complete log trace.

PowerPoint Add-in 6.1.x

PowerPoint Addin enables users to upload new files and edit existing OpenKM files.

When a user uploads new files, he browses across the OpenKM tree view to select where he wants to upload the file.

The OpenKM PowerPoint Add-in detects if the document opened by a user is an OpenKM file and enables or disables some toolbar options.

Office Add-ins are compatible from version 2000 to version 2013.

After installing the Outlook add-in, a new menu item "OpenKM" will appear in Outlook.

() Configuration	Check-in
🔒 Upload	Cancel
🛃 Edit	🚺 Help
OpenK	M

Detail of the functions according to their icons:

Button	Action
() Configuration	Addin configuration.
	Add new document
	Document edit (check-out)
	Upload modified document (check-in)
	Cancel document edit
Ũ	Help

Configure OpenKM Add-In

First you must select the OpenKM tool bar option to set your configuration values to access OpenKM from the client computer. If you've got other OpenKM Add-Ins already installed, this may not be needed.

Users of OpenKN option.	/I version 6.3.x shoul	d use " Webser	vices 1.0" option in	n the OpenK	M version configure
() Configuration					x
6	OpenKM Version	Pro 6.2+	 Language 	English	•
JKM	User Password	user1			
	Host	http://demo.o	openkm.comOpenKM		Test

When you set your configuration values, a folder called **OpenKM** is created in your user **My documents folder**. In this OpenKM folder, a configuration file called **openkm.xml** and another file called **document.xml** are created that the OpenKM Add-in uses to store some document editing information. You should not edit or delete these files.

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Escritorio Sitios recientes Bibliotecas	E	
Documentos Imágenes Música	openkm.xml	
Subversion		
💺 Equipo		
A Disco local (C:)	*	

Uploading a new file

Click on the add new document button, a folder tree view will be shown. You must select the folder where you want to upload the file.

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() Navigation tree		
Context Taxonomy	Refresh Search	Upload Cancel
e-Contract C		

Click on the Send Button and after that the document will be uploaded to OpenKM and a notification message will be shown.

X
Document has been send successfuly
Aceptar

Editing an OpenKM document

Click on the *odcument* edit button, a folder navigator will appear. You must navigate across folders and select a document that you want to edit.

axonomy	• S	earch folder	Search document	Edit	
B- Con okm root			Name	Author	Version
	Þ	•	test.pptx	test2	1.1
		1	test xlsx	okm.Admin	4.0
		1	test2.docx	okm.Admin	3.0

When you've got some OpenKM document opened, the **Upload modified document** (check-in) and **Cancel document edit** toolbar options will be enabled.

- To upload modified document, use the Upload modified document (check-in) toolbar button.
- To cancel document editing, use the 📮 Cancel document edit toolbar button.



Log

In My Documents/OpenKM there's a file log called PowerPointAddin.log with a complete log trace.

Change log of version 7.1.x

Office Add-in Tool 7.1.x

v 7.1.9

- Released 2020-06-22.
- Update OKMRest version 3.7.1.
- New add-ins for MSProject and MSAccess.

v 7.1.8

- Released 2020-04-17.
- Allows comparing versions of a document with the OKMWordAddin.
- By selecting a document for editing, you can navigate through the **categories** for easier access. (Word, Excel, PowerPoint and Visio)
- Update OKMRest version 3.7.0 (compatible with OpenKM version 7.1.11 and upper)
- Bugs
- Error to import an email whose subject was not defined. (Outlook)
- Error selecting language set from settings.

v 7.1.7

- Released 2020-02-18
- Update OKMRest version 3.6.0 (compatible with OpenKM version 7.1.9 and upper)

v 7.1.6

- Released 2020-02-07
- It works with all versions of Microsoft Office from 2000 to Office 2019.

v 7.1.5

- Released 2019-11-25
- Update OKMRest version 3.5.0.

v 7.1.4

- Released 2019-09-06
- Bugs
- Error adding metadata with OpenKM 7.1.5

v 7.1.3

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- Released 2019-04-05
- Allows uploading documents, linked to the OneDrive account, to the OpenKM repository.
- Bugs
 - Validation of the host URL for methods using System.Net.Http in the SDK to .net.

v 7.1.2

- Released 2019-02-11
- Update OKMRest version 3.1:
 - Replacement of objects with the name "XXXList", by lists directly (List<T>).

v 7.1.1

- Released 2019-01-24
- Allow select multiple in metadata fields.
- Authentication by Token.

Change log of version 6.2.x

Office Add-in Tool 6.2.x

v 6.2.12

- Released 2020-06-22
- Update **OKMRest version 2.7.0** (compatible with OpenKM version 6.4.52 and upper)
- New add-ins for **MSProject** and **MSAccess**.

v 6.2.11

- Released 2020-04-17.
- Allows comparing versions of a document with the OKMWordAddin.
- By selecting a document for editing, you can navigate through the **categories** for easier access. (Word, Excel, PowerPoint and Visio)
- Update OKMRest version 2.6.3 (compatible with OpenKM version 6.4.45 and upper)
- Bugs
- Error to import an email whose subject was not defined. (Outlook)
- Error selecting language set from settings.

v 6.2.10

- Released 2020-02-07
- It works with all versions of Microsoft Office from 2000 to Office 2019.

v 6.2.9

- Released 2019-04-09
- Allows uploading documents, linked to the OneDrive account, to the OpenKM repository.
- Bugs
- Validation of the host URL for methods using System.Net.Http in the SDK to .net.

v 6.2.8

- Released 2018-12-21
- Allow select multiple in metadata fields.

v 6.2.7

- Released 2018-11-16
- Implementation of WIX installers, to install the add-in for "Everyone" or "Just me".

• Updated tools:

- Net Framework 4.5.2
- AddIn Express version 9.1.4620
- Bug SDK:
 - Upload, download and update large files. Affected methods: createDocumetSimple, getContent and check-in.

v 6.2.6

- Released 2018-09-14
- Update:
 - OKMRest version 2.6.0

v 6.2.5

- Released 2018-07-17.
- Word Add-in:
 - Allow you to manage the relations of the document (Bidirectional, Parent-Child and Group Relations).

v 6.2.4

- Released 2017-12-16.
- Customization:
 - The text "OpenKM" what is shown by default in the main tab, now can be replaced by your own.

v 6.2.3

- Released 2017-09-20.
- Visio Add-in:
 - Implementation for Microsoft Visio.
- Outlook Add-in:
 - Allows you to add mail attachments from OpenKM when you send new emails.
 - Allows creating, editing and deleting folders within OpenKM from the contextual menu of the navigator tree.
- Outlook Add-in, Word Add-in, Excel Add-inand Powerpoint Add-in:
 - Allows you to add metadata.
 - AddIn-Express update to version 8.6.4408
 - Improve the portion of how translations are loaded.
- Bug
- Remove method execute a script. (Word Add-in, Excel Add-in and Powerpoint Add-in)
- Refresh explorer from after a check-in.

v 6.2.2

- Released
- Outlook Add-in:
 - Allow dragging emails to OpenKM tree view panel to import.
 - Allow import only attachments feature to OpenKM.
 - Add options in configuration form:
 - Attachment path and enable attachment log options: Create a log (in an OpenKM table) to audit the file what has been sent.
 - Intercept attachments option: Replace attachments with OpenKM document links.
- Word Add-in:
 - When editing, you can update to a major or minor version of the document.
 - Implementation of the panel to display document properties, notes, and metadata.

v 6.2.1

Released

v 6.2.0

- Released
- Outlook Add-in, Word Add-in, Excel Add-inand Powerpoint Add-in:
 - Use OKMRest library (remove old SOAP support).

Troubleshoting

Enable or disable the OpenKM AddIns toolbar in Microsoft Office.

For WordAddIn, ExcelAddIn and PowerPointAddIn:

- 1. Click the office button and go to word options.
- 2. A new window will be shown, look for the option complements, select the **Complement COM** option and press the **Go** button.
- 3. Finally **check** the box **OpenKMWord_AddIn** and press the **OK** button.

Complementos disponibles:	
OpenKMWord_Add-in Visual Studie Tools for Office Design-Time Adaptor for Word	2 Aceptar Cancelar
	Agregar Quitar
Ubicación: C:\Users\DXD\AppData\Local\OpenKM\OKMWordAddIn\adxk Comportamiento de carga: Cargar al inicio	oader.dll

For OutLookAddIn:

- 1. Go to the **Tools menu** and look for the option to **customize**.
- 2. A new window will be shown in what you should select the box of the **commandBarOKM** option and press the **close** button.

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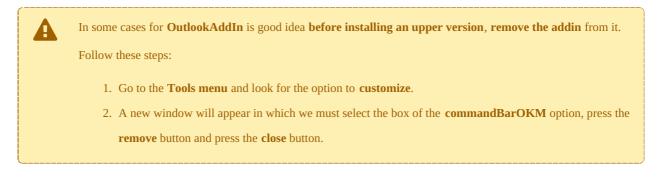
Microsoft Addin

Correo Personalizar Carpetas favo Bandeja Barras de herramientas Carpetas de co Element Carpetas de co Carpetas Bandeja Para de menús Wab Context Taxonomy Grouped Context Taxonomy Grouped Carpetas test Carpetas test Context Taxonomy Context Taxonomy Context Taxonomy Context Carpetas test Carpet	Bandeja de entrada - Microsoft Outlook Archivo Edición Ver Ir Herramientas Acciones Nuevo Nuevo<					
	Carpetas favo Bandeja Element Carpetas de co O Todos los e Carpetas de co O Todos los e Carpetas Band O OpenKM Context Taxonomy Grouped	Barras de herramientas: V Estándar V Avanzadas Barra de menús Web V commandBarOKM ESET Smart Security Eliminar Restablecer Cerrar	P vo encima 15 12:06 0 15 12:00 0 0 15 12:00 0 15 12:00 0 15 12:00 0 0 15 20:58 10/2017 10/2017 0 13/2017 0 13/2017 0	Aablo F wiado: ra:		

Uninstall Office Addins

To **uninstall** OpenKM Office Add In, follow these steps:

- 1. Press the **start** button of windows and look for the **control panel**.
- 2. It will show a window in waht you should choose the option to **uninstall a program**, select the OKMOfficeAddIn you want to remove and press the **uninstall** button.



Language pack

The application can work with several languages, there are set the languages terms definitions.

Sometimes translations are not fully completed and some terms are missing. The "en-GB" is used to identify which are the missing terms and how many are.
 When a term is missing in other languages the "en-GB" term is used in its place.

en-GB translation cannot be removed.

Spanish translation

```
# Main tab
addins.main.tab.caption=OpenKM
# Configuration form
form.configuration.name=Configuración
form.configuration.language=Idioma
form.configuration.version=OpenKM Versión
form.configuration.userName=Usuario
form.configuration.password=Contraseña
form.configuration.host=Host
form.configuration.error.msg=El campo {0} no puede estar vacío
form.configuration.button.accept=Aceptar
form.configuration.button.cancel=Cancelar
form.configuration.button.test=Prueba
form.configuration.test.error=Error en la prueba de conexión!!!
form.configuration.connection.error=La conexión falló !!!
form.configuration.test.ok=Conexión establecida satisfactoriamente
form.configuration.attachment=Ruta archivos adjuntos
form.configuration.label.intercept.attachments=Interceptar archivos adjuntos
form.configuration.option.never=Nunca
form.configuration.option.ask=Preguntar
form.configuration.option.always=Siempre
form.configuration.label.attachmentLog=Habilitar registro archivos adjuntos
form.configuration.label.addMetadata=Añadir metadatos
# Tree form
form.tree.title=Árbol de navegación
form.tree.context.root=Taxonomía
form.tree.context.templates=Plantillas
form.tree.context.personal=Personal
form.tree.context.mail=Correo
form.tree.contextmenu.newfolder=Nueva carpeta
form.tree.contextmenu.renamefolder=Renombrar carpeta
form.tree.contextmenu.deletefolder=Borrar carpeta
form.tree.button.accept=Cargar
form.tree.button.select=Seleccionar
form.tree.input.title=Gestión de carpetas
form.tree.button.refresh=Refrescar
form.tree.button.search=Buscar
form.tree.button.cancel=Cancelar
form.tree.msg.foldername.empty=Error, el nombre de la carpeta está vacío
form.tree.grouped=Agrupar
# Search form
```

form.search.title=Buscar form.search.msg.min.char=Por lo menos necesitas agregar tres caracteres form.search.msg.empty=La búsqueda ha devuelto resultados en blanco form.search.button.search=Buscar form.search.button.cancel=Cancelar # Explorer form form.explorer.form.name=Editor de documentos form.explorer.context.taxonomia=Taxonomía form.explorer.context.plantilla=Plantillas form.explorer.context.usuario=Personal form.explorer.context.categories=Categorías form.explorer.button.edit=Editar form.explorer.button.select=Seleccionar form.explorer.button.searchFolder=Buscar carpeta form.explorer.button.searchDoc=Buscar documento form.explorer.button.exit=Salir form.explorer.button.sign=Firmar form.explorer.dataGrid.column.name=Nombre form.explorer.dataGrid.column.author=Autor form.explorer.dataGrid.column.version=Versión form.explorer.dataGrid.column.date=Fecha form.explorer.dataGrid.column.title=Título form.explorer.button.searchMail=Buscar correo form.explorer.dataGrid.column.size=Tamaño # Attachment form form.attachment.button.next=Siguiete form.attachment.button.cancel=Cancelar form.attachment.title=Archivos adjuntos form.attachment.datagridview.column.name=Archivos form.attachment.message.successful.load=Archivos adjuntos cargados correctamente # Addins addins.ribbon.button.configure=Configuración addins.ribbon.button.add=Subir addins.ribbon.button.edit=Editar addins.ribbon.button.cancel=Cancelar addins.ribbon.button.cheking=Actualizar addins.ribbon.button.help=Ayuda addins.ribbon.commandBar.configure=Configuración addins.ribbon.commandBar.add=Subir addins.ribbon.commandBar.edit=Edit addins.ribbon.commandBar.cancel=Cancelar addins.ribbon.commandBar.cheking=Actualizar addins.ribbon.commandBar.help=Ayuda addins.ribbon.commandBar.import=Importar addins.ribbon.commandBar.import.attachment=Importar archivos adjuntos addins.ribbon.commandBar.add.attachment=Añadir adjuntos addins.confirm.check.in=Está seguro de actualizar el documento? addins.confirm.cancel.checkout=Está seguro que desea cancelar edición del documento? addins.status.checkin=Documento actualizado... addins.status.checkout=Cancelar edición... addins.status.document.send=El documento se ha enviado correctamente addins.label.comment=Introduzca un comentario para la versión addins.word.document.extension.warning=Parece que no tiene una extensión de archivo de addins.excel.document.extension.warning=Parece que no tiene una extensión de archivo addins.powerpoint.document.extension.warning=Parece que no tiene una extensión válida addins.visio.document.extension.warning=Parece que no tiene una extensión de archivo addins.project.document.extension.warning=Parece que no tiene una extensión de archiv addins.access.document.extension.warning=Parece que no tiene una extensión de archivo addins.mail.without.subject=Asunto:(Vacío) addins.mail.success=Exitoso addins.mail.fail=Falla addins.mail.without.subject.imported=Asunto:(Vacío) se ha importado correctamente addins.mail.without.subject.imported.fail=Asunto:(Vacío) no se ha importado correctam addins.mail=Correo

addins.mail.total.sucess=Total exitosos addins.mail.total.fail=Total fallidos addins.intercept.message=Desea reemplazar los archivos adjuntos? addins.message.sent.continue=Desea continuar enviando el correo con archivos adjuntos addins.message.notFoundLogTable=No pudo encontrar la tabla de registro, si continúa e addins.message.progressFrom=En proceso, por favor espere... addins.mail.without.successful.imported=Correo importado correctamente. addins.ribbon.commandBar.navigation=Navegación addins.ribbon.commandBar.compare=Comparar versiones addins.message.change.existing.document=El documento {0} ya existe, desea actualizar1 addins.message.change.existing.file=El archivo {0} ya existe, desea actualizarlo? addins.message.warning.title=Aviso addins.message.save.elements=Asegúrese de guardar todos los cambios. Si ha guardado t addins.message.document.existing=El documento {0} ya existe. addins.status.file.send=El archivo se ha enviado correctamente. # TabPages adxwordtaskpane.tabpage.properties.caption=Propiedades adxwordtaskpane.tabpage.properties.label.uuid=UUID adxwordtaskpane.tabpage.properties.label.name=Nombre adxwordtaskpane.tabpage.properties.label.title=Título adxwordtaskpane.tabpage.properties.label.folder=Carpeta adxwordtaskpane.tabpage.properties.label.size=Tamaño adxwordtaskpane.tabpage.properties.label.version=Versión adxwordtaskpane.tabpage.properties.label.language=Idioma adxwordtaskpane.tabpage.properties.label.created=Creado adxwordtaskpane.tabpage.properties.label.lastModified=Modificado adxwordtaskpane.tabpage.properties.label.mimeType=Tipo MIME adxwordtaskpane.tabpage.properties.label.keywords=Palabras claves adxwordtaskpane.tabpage.properties.label.status=Estado adxwordtaskpane.tabpage.properties.label.subscribed=Suscritos adxwordtaskpane.tabpage.properties.label.subscriptors=Subscriptores adxwordtaskpane.tabpage.properties.label.categories=Categorias adxwordtaskpane.tabpage.properties.label.historySize=Tamaño del histórico adxwordtaskpane.tabpage.properties.button.editTitle=Editar adxwordtaskpane.tabpage.properties.msg.status.by=por adxwordtaskpane.tabpage.properties.msg.status.edit=Editado por adxwordtaskpane.tabpage.properties.msg.status.locked=Bloqueado por adxwordtaskpane.tabpage.properties.msg.status.available=Disponible adxwordtaskpane.tabpage.properties.msg.subscribed.yes=Si adxwordtaskpane.tabpage.properties.msg.subscribed.no=No adxwordtaskpane.tabpage.notes.caption=Notas adxwordtaskpane.tabpage.notes.button.add=Añadir adxwordtaskpane.tabpage.notes.button.edit=Editar adxwordtaskpane.tabpage.notes.button.cancel=Cancelar adxwordtaskpane.tabpage.notes.label.addNote=Añadir nota adxwordtaskpane.tabpage.metadata.button.remove=Eliminar adxwordtaskpane.tabpage.metadata.question=Desea eliminar este grupo de metadatos? #Relations adxwordtaskpane.tabpage.relation.caption=Relaciones adxwordtaskpane.tabpage.relation.label.type=Tipo de relación adxwordtaskpane.tabpage.relation.label.title=Relación adxwordtaskpane.tabpage.relation.type.bidirectional=Equivalente adxwordtaskpane.tabpage.relation.type.parent=Es padre de adxwordtaskpane.tabpage.relation.type.child=Es hijo de adxwordtaskpane.tabpage.relation.type.many=De grupo adxwordtaskpane.tabpage.relation.group.title=Relaciones de grupo adxwordtaskpane.tabpage.relation.bidirectional.title=Relaciones equivalentes adxwordtaskpane.tabpage.relation.parentchild.title=Relaciones padre-hijo adxwordtaskpane.tabpage.relation.confirm.title=Confirmación adxwordtaskpane.tabpage.relation.confirm.question.delete.relation=Seguro que deseas e adxwordtaskpane.tabpage.relation.confirm.question.delete.node=Seguro que deseas elimi: adxwordtaskpane.tabpage.relation.confirm.question.delete.group=Seguro que deseas elim adxwordtaskpane.tabpage.relation.confirm.question.rename.group=Renombrar grupo adxwordtaskpane.tabpage.relation.group.find=Buscar relaciones de grupo

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```
#Download
form.download.information=Información
form.download.documents=Cocumentos
form.download.button.accept=Descargar ahora
form.download.button.close=Cerrar
form.download.size=Tamaño
form.download.progressform=Descargando, espere por favor...
# Metadatas
form.selectMetadata.caption=Añadir grupo de metadatos
form.selectMetadata.button.add=Añadir
form.selectMetadata.button.cancel=Cancelar
form.selectMetadata.button.finish=Finalizar
form.selectMetadata.add.message=metadatos agregados correctamente.
# Application messages
message.required=Requerido
message.required.field=Faltan llenar campos.
# Version History form
form.versionHistory.title=Historial
form.versionHistory.dataGridViewVersions.column.version=Versión
form.versionHistory.dataGridViewVersions.column.date=Fecha
form.versionHistory.dataGridViewVersions.column.author=Autor
form.versionHistory.dataGridViewVersions.column.size=Tamaño
```

Create a new language

Language translations are displayed with the following structure.



To **create** a file with a new **language**, follow these steps:

1. Creates a new text document named **OKMAddin-xxXX** with the **.properties** extension, where **xxXX** refers to the

language identifier (ISO 639).

For example in the case of the Spanish language, it would be es
ES (in English is enGB), that means the file must be $% \left({{\left[{{{\rm{B}}_{\rm{B}}} \right]}_{\rm{B}}} \right)$

named OKMAddin-esES.properties.



Copy into the file created the example of the top of the Spanish translation. Each line of text it has sections, the " Key property" and "Translation value". The first one should not be changed and the second it refers to translated text and is what you should change.

For example:

```
# Configuration form
form.configuration.name=Configuration
form.configuration.language=Language
form.configuration.version=OpenKM Version
```

Replace by:

• • •

```
# Configuration form
form.configuration.name=Configuración
form.configuration.language=Idioma
form.configuration.version=OpenKM Versión
...
```

3. Save the file into the **installation folder**, if:

- Installation for "Just me" -> for example "C:\Users\<Name>\AppData\Local\OpenKM".
- Installation for "Everyone" -> for example "C:\Program Files (x86)\OpenKM\OKMWordAddIn"

• Or the path you selected for installation.