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# **Open Bee™ Sync – Administration Guide**



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Open Bee™

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# Welcome

The Open Bee<sup>™</sup> Sync user Guide gathers recommendations, advice and suggestions on how to use Open Bee<sup>™</sup> Sync in conjunction with Open Bee<sup>™</sup> DMS. In order to make the best out of it, please acquaint yourself with the concepts and procedures described hereunder.

Please visit our Open Bee<sup>™</sup> website should you have any question or should you need any additional information:

#### http://www.myopenbee.com

This guide have been written and published under the control of Open Bee™.

Open Bee<sup>™</sup> Sync is a software that lets you synchronize and file your documents between your computer and your Open Bee<sup>™</sup> DMS Server. Thanks to automatic or manual synchronizations, your documents will be saved remotely in order to optimize your work. This way, you can edit them in the train, in the plane, at the office or at the hotel.

Moreover, they will be immediately updated on all of your devices (computer, smartphone, tablet, etc.). With Open Bee<sup>™</sup> Sync, you can also connect your scanning solution to your Open Bee<sup>™</sup> DMS server and file your scanned paper documents.

With Open Bee<sup>™</sup> Sync, you can:

#### - Directly upload scanned paper documents from your scanning device.

Open Bee<sup>™</sup> Sync monitors a specific folder where the scanning device will send scanned paper documents. Each time a new file appears, this one is automatically sent to the Open Bee<sup>™</sup> DMS "Filing" section, ready to be indexed and filed.

#### - Synchronize documents between your Windows workstation and the Open Bee™ DMS.

Open Bee<sup>™</sup> Sync enables to synchronise documents so that you get the most recent version of the file you want to work on.

#### - Bulk upload documents

The "drag-and-drop" function in Open Bee<sup>™</sup> Sync lets you upload one or more documents (and folders) with a simple drag and drop from your PC into the Open Bee<sup>™</sup> DMS



# **Software installation**

#### **System requirements**

The system requirements for the application to run depend on various factors, including the size of the scanned documents. Open Bee<sup>™</sup> Sync's speed of execution depends on the power of the PC on which the software is installed, but also on its memory, on the quality of the network signal and on the server load. The configuration described here will change according to the needs of each type of use. These are the minimal system requirements so that Open Bee<sup>™</sup> Sync can run properly:

- A computer with an Intel<sup>®</sup> Core<sup>™</sup> 2 Duo processor, or equivalent
- Microsoft<sup>®</sup> Windows<sup>®</sup> XP, Vista or Microsoft<sup>®</sup> Windows<sup>®</sup> 7 (32 and 64 bits professional editions), Microsoft<sup>®</sup> Windows<sup>®</sup> 2003 Server or 2008 Server (with superior system requirements).
- Microsoft Internet Explorer 7, 8, or equivalent
- 2GB RAM
- 400MB of free disk space (changes with the volume of the documents to stock)
- A color display (16-bit) resolution of 800x600, or more
- A mouse and a keyboard compatible with Microsoft<sup>®</sup> Windows<sup>®</sup>
- A scanning device compatible with **Open Bee™ Sync** and the corresponding driver
- Microsoft<sup>®</sup> Framework.Net 4

# Installing Open Bee<sup>™</sup> Sync

# The Open Bee<sup>™</sup> Sync Installer will guide you step by step through the software installation process.

Before installing Open Bee<sup>™</sup> Sync, please make sure to be logged as an administrator of you workstation.

Description	Illustration
1. Double-click " <b>Setup</b> " to run the installer.	File       Home       Share       View       View <ul> <li></li></ul>
2. The home page displays. Click " <b>Next</b> "	Open Bee Sync     -       Welcome to the Open Bee Sync Setup Wizard
	The installer will guide you through the steps required to install Open Bee Sync on your computer. WARNING: This computer program is protected by copyright law and international treaties. Unauthorized duplication or distribution of this program, or any portion of it, may result in severe civil or criminal penalties, and will be prosecuted to the maximum extent possible under the law.
	Cancel < Back Next >



	📴 Open Bee Sync – 🗆 🗙
3. Click " <b>Browse</b> " to select where you want to install the software.	Select Installation Folder
4. Click " <b>Next</b> " when you have chosen a location.	The installer will install Open Bee Sync to the following folder.         To install in this folder, click "Next". To install to a different folder, enter it below or click "Browse".         Eolder:         C:\Program Files (x86)\OpenBee\Open Bee Sync\         Browse         Disk Cost
	Dpen Bee Sync – 🗆 🗙
5. A confirmation page displays.	Confirm Installation
Click " <b>Next</b> " to start the installation process.	The installer is ready to install Open Bee Sync on your computer. Click: "Next" to start the installation.



	😸 Open Bee Sync 🗕 🗆 🗙
6. Wait until the installation is done.	Installing Open Bee Sync
	Open Bee Sync is being installed.
	Please wait
	Cancel < Back Next >
	Cancel < Back Next >
	🛃 Open Bee Sync 🗕 🗆 🗙
7. The installation is now finished.	Installation Complete
Click " <b>Close</b> "	
	Open Bee Sync has been successfully installed. Click "Close" to exit.
	Please use Windows Update to check for any critical updates to the .NET Framework.
	Cancel < Back Close
	Dpen Bee Sync
8. A small window will display and ask you to restart your computer.	You must restart your system for the configuration changes made to Open Bee Sync to take effect. Click Yes to restart now or No if you plan to manually restart later.
Click " <b>Yes</b> " if you want to restart now, or click	
"No" if you want to restart later.	Yes No



9. A shortcut will be added to your desktop and in your "**Start**" menu (if you use Windows 7 and anterior versions), or in your "**Home**" menu if you use Windows 8.



10. **Double-click** this shortcut to start the software.



# How to start Open Bee<sup>™</sup> Sync

In order to use your Open Bee Sync, you must be connected to Open Bee DMS

To start Open Bee<sup>™</sup> Sync, please do the following:

■ From the start menu « Start / All programs / Open Bee<sup>™</sup> / Open Bee<sup>™</sup> Sync »

# Open Bee<sup>™</sup> Sync appears:

🎒 Open Bee™s	ync				r.vals	an@myopenbee.org	I	<u>Logout</u> <u>Help</u>
Upload File	Sync Files sync conflict	Event logs	User account	Settings	About			
Option 1: Use the drop Option 2: Scan paper d	ws you to upload documents to the fili zone and/or locuments from your Open Bee™ devic have been uploaded to the Open Bee I	e.		-		you have 2 options:		
	dd dd wi s s	ocuments scanned evice to Open Bee I indows folder when anned. Il documents locate	atically transfer paper from your Open Bee Portal, please select t re your documents ar ed in this folder will b ed to the Open Bee Pe	ne e				
✔ Run Open Bee Sync at windows st	artup					Save	Cl	ose

### **Connect Open Bee™ Sync to Open Bee™ DMS**

In order to use your Open Bee<sup>™</sup> Sync, you must be connected to Open Bee<sup>™</sup> DMS.

Access the "User Account" tab:

📥 Open Bee	r.valsan@mj							rinc rival					
Upload File	Sync	Files sync conflict	Event logs	User account	Settings	About		<u>Help</u>					
1 This user interface a	llows you to connec	t to Open Bee Portal to	perform docume	nt uploading, filing a	and synchronizing								
Account Settings													
URL or IP Address https://	portal.myopenbee	.org											
	443 🗹 SSL	(	your Open	he URL (or IP addres Bee Portal cloud bas	sed								
Email	admin@myopenb	ee.org	solution an password o	d enter your login a redentials.	nd								
Password	•••••												
✓ Run Open Bee Sync at windows	startup						Save	Close					

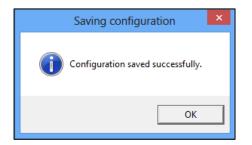
Then fill in the login information, as in the following example:

- Fill in your URL or your IP address of your Open Bee<sup>™</sup> DMS.
- Fill in your port and check the "SSL" option if you want to use a secured connection
- Fill in your Open Bee<sup>™</sup> DMS username and password

Account Settings	
URL or IP Address https://	portal.myopenbee.org
	443 🗹 SSL
Email	admin@myopenbee.org
Password	••••••

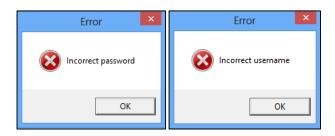
Once you have filled in all the fields, click "Save" in order to establish the connection.

A confirmation window will appear to inform you that the connexion has been successfully performed.



Click "OK".

If your password or your username is incorrect, one of the following windows will appear:

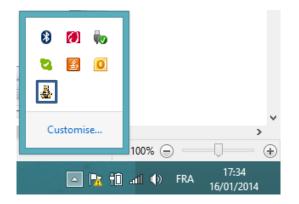


If you don't have an Open Bee™ DMS username or password yet, contact your system administrator to have an account created for you.

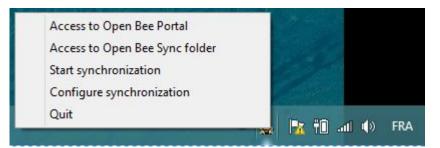


When you are done using Open Bee<sup>™</sup> Sync or when you click the red X to close the window, connection to the software is not interrupted.

If you want to re-open the software window, click in your task bar and then double-click on the Sync Tool icon, as depicted below:



To close the software for good, right-click on the small Open Bee<sup>™</sup> sync icon, then click "Quit".



# Settings tab: Configuring Open Bee<sup>™</sup> Sync

### Accessing your proxy server

If your local network has a proxy server, you can configure it in the "Settings" tab.

In this tab, you can also change the display language for Open Bee<sup>™</sup> Sync.

Upload       File       Sync       Files sync conflict       Event logs       User account       Settings       About         Image: This user interface allows you to set up a proxy server (if needed) and select your preferred language.       Connection Settings       Image: This user interface allows you to set up a proxy server (if needed) and select your preferred language.         Configure a proxy server       Configure a proxy server       Image: This user interface allows uses proxy settings to connect to the internet, check the box "Configure a proxy server". An automatic detection can be performed. Otherwise you can be performed. Otherwise you can be performed. Otherwise you can manually configure your network proxy settings.         Image: Confirmation settings       Language Settings         Image: Show Confirmation Uncheck Sync Folder       Language Settings	COPEN BEE™ Sync						
Connection Settings         If your network uses proxy server         Configuration         URL or IP Adress         Proxy authentification         Login         Password	Upload File Sync	Files sync conflict Event logs	User account	Settings	About		
Configure a proxy server   Configuration   URL or IP Adress   Proxy authentification   Login   Password   Confirmation settings   Confirmation Transfer   Language Settings	This user interface allows you to set u	o a proxy server (if needed) and select you	r preferred language.				
Configuration       ``         URL or IP Adress       : ``         Proxy authentification       : ``         Login          Password          Confirmation settings       Language Settings         Y Show Confirmation Transfer       Language Settings	Connection Settings						
URL or IP Adress       :         Proxy authentification       :         Login       .         Password       .         Confirmation settings       Language Settings         Image: Settings       .         Image: Settings       .						_	
Login     manually configure your network proxy settings.       Password     Language Settings       Image: Confirmation settings     Language Settings       Image: Show Confirmation Transfer     English				con " Ce	nnect to the internet, check onfigure a proxy server".	the box	
Password Confirmation settings Show Confirmation Transfer Language Settings English				ma	nually configure your netw		
Show Confirmation Transfer							
Show Confirmation Transfer English							
Light	Confirmation settings	Language Settings					
Show Confirmation Uncheck Sync Folder	Show Confirmation Transfer	English	~				
	Show Confirmation Uncheck Sync Folder						
	Run Open Bee Sync at windows startup				Save	Clo	ose

#### Automatic configuration of the proxy server

Choose the "**Automatically detect settings**" to do an automatic detection of your proxy server's parameters.

*It is option is available only of you have checked the* "<u>Configure a proxy server</u>" box.

Connection Settings		
✓ Configure a proxy server		
Configuration	v	
URL or IP Adress	Automatically detect settings Manually set proxy settings Proxy authentification	:
Login		
Password		

Automatic detection of the proxy server is based on the proxy configuration in Internet Explorer or in the system configuration (Control panel -> Internet options -> Logins -> LAN settings).

If you choose the automatic configuration, Open Bee™ Sync will search for a configuration done from Internet Explorer/System and will use it.

#### Manual configuration of the proxy server

Choose the "**Manually set proxy setting**" to do a manual configuration of your proxy server's parameters.

As for the automatic connection, this option is available only of you have checked the "Configure a proxy server" box.

- Then fill in your URL or IP address, as well as the port your connection uses.
- Use "Proxy authentication" if your proxy is configured with a user and a password. Now type the login and password required for the proxy connection

# Language selection

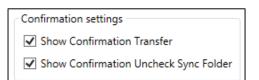
You can choose the language in which you want your software to be configured as well.

٢	anguage Settings	
	English	~
	Français	
	English	P
	German	
	Italian	
	Spanish	
	Portuguese	
Г	Chinese	
	Simplified Chinese	

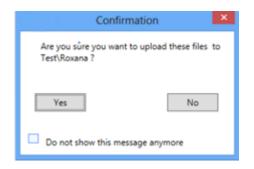
The following window will appear to inform you that you will have to restart Open Bee<sup>™</sup> Sync in order for the language change to take effect.

Information	×
Please restart Open Bee Sync for the language change to take effect.	
ОК	

# **Confirmations configuration**



Show Confirmation Transfer: will display the file transfer configuration window in the "File" tab



Click "Yes" to confirm or "No" to cancel.

<u>Show Confirmation Uncheck Sync Folder</u>: will display the following information window that informs you that if you uncheck a folder in the **Sync** tab, it will be deleted when you save the configuration:

When you have configured all of your parameters, save the configuration with the "Save" button

A small window will appear to inform you that the details you filled in have been taken into account.



Click "OK".

Open Bee<sup>™</sup> Sync is now properly configured. You can now start synchronizing your folders and files with your Open Bee<sup>™</sup> DMS.

Lick "<u>Run Open Bee™ Sync at windows start up</u>" if you want to launch the software when starting up your computer. By default, this option is not active.

Run Open Bee Sync at windows startup

# **User Guide**

# The "Sync" tab

In Open Bee<sup>™</sup> Sync, you can use the "**Sync**" tab to enable synchronization of your documents between your PC and Open Bee<sup>™</sup> DMS.

🚑 Ореп Вее™ sy	/nc			r.valsan@myopenbe	ee.org   <u>Logout</u> <u>Help</u>
Upload File	Sync Files sync conflict	Event logs User acco	unt Settings	About	
This user interface allow     Sync folder setting	vs you to synchronize files between a fo	lder on your computer and Op	en Bee Portal		
Frequency 1 Open Bee Portal folder C:\Users\c Open Bee Portal folder tree	Minutes	v 		Select the frequency at u your files and folders to synchronized. Then, select your local C Portal folder.	be
<ul> <li>▷ ♥ ■ Education</li> <li>▷ ■ Employment</li> <li>▷ ■ Home office</li> <li>▷ ■ Insurance</li> <li>○ ■ Insurance</li> <li>○ ■ Legal</li> <li>▷ ■ Retail</li> <li>▷ ■ Workspaces</li> </ul>				Please select the Open B cloud-based folders that like to be synchronized o folders.	t you would
✓ Run Open Bee Sync at windows sta	artup			Save	Close

• In "Frequency", type the synchronization frequency of your choice. You can choose to synchronize your documents in minutes or in hours.

Frequency	1	Minutes `	~

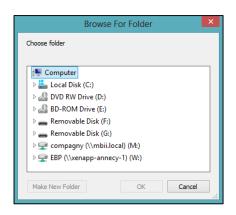
*If, like in the example, you choose 1 and "minutes", your documents will be synchronized every minute.* 

• In "**Open Bee™ Sync folder**" please select which folder of your PC will be synchronised with Open Bee™ DMS.

All documents in this folder will be automatically sent to Open Bee<sup>™</sup> DMS, and *vice versa*.

Open Bee Portal folder	C:\Users\claire_g.MBII\Open Bee Sync	]	

To select this folder, click the ellipses and select the location you want. The following window opens:



• Choose the location in your tree, then click "OK"

 $\checkmark$  Only the files that exist in the selected location will be synchronized and automatically transferred to your Open Bee<sup>m</sup> DMS.

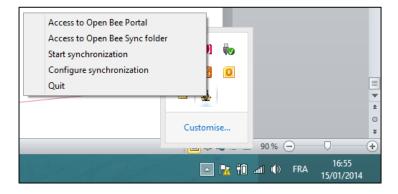
If you delete files in the synchronization folder, these files will be automatically deleted from Open Bee<sup>™</sup> DMS at the next synchronization.

OpenBee Portal folder tree		
Root     Boot     Boot     Boot     Boot     Sync     Workspaces		
• • • • • • • • • • • • • • • • • • •		



You can also start a manual synchronization. To do so, click the Sync Tool in the bottom right part of your screen, in the task bar.

Left-click on "Start Synchronization"



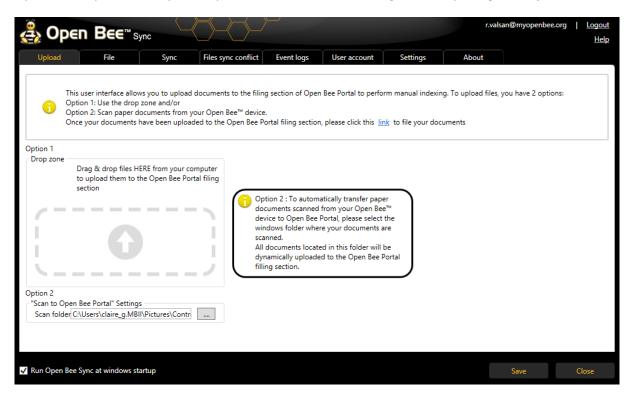
### The "Upload" tab

Open Bee<sup>™</sup> DMS include a filing section where you can easily index and file documents that have been previously uploaded.

Document preview	File in	
P 全 Page: 1 of 6 - + Automatic Zoom ÷ 口 見 見 見	Select a document type	Insurance
	Document type	Insurance application
Department of Employee Trust Funds	Document date	Adoption certificate Certificate of insurance
State of Wisconsin Employees and Annutants Wisconsin Public Employees and Annutaints UW Graduate Assistants, Employees in Training, Short-Term Academic Staff, Fellows and Scholars Wis. Stat: § 40.51	Document issuer	Civil partnership certificate Claim form Client account Contract
You must submit this application to your employer if you are actively employed, or to the Department of Employee Trust Funds (ETF) if you are an annuitant or on continuation. Use this form to: decline, add or cancel health insurance coverace; chance health plans, change coverage	Comment	Copy of annual tax return
form to decline, add or called meanin insulatice coverage, change healin plans, change coverage levels, or update personal information; and add or remove dependents. For <u>complete enrollment</u> and <u>program information</u> , read the <u>It's Your Choice quides</u> . Your initial enrollment period is as follows:	🗲 Your document will be	Fact finders Full birth certificate
a) Within 30 days of your date of hire to be effective the first of the month on or following receipt of application by the employer; or	/Insurance/Insurance applica Your document will be r	Insurance application
b) State employees only—Before becoming eligible for state contribution (completion of two months of state service under the Wisconsin Retirement System (VRS) for permanent/project employees, six months of state service for limited term employees or completion of 1,000 hours of service for WISCR AFT employees. This does not apply to UW unclassified faculty/academic staft.	Insurance application Docum	Insurance quote National identity card New account opening form
<ul> <li>c) Wisconsin Public Employers' participants only—Within 30 days prior to becoming eligible for employer contribution.</li> </ul>		Pay slip

*Please read the appropriate section of the Open Bee™ DMS user manual for more information on this subject.* 

Open Bee<sup>™</sup> Sync enables you to upload documents to this Filing section by using the "**Upload**" tab.



There are two options that you can use to upload documents:

- 1. Dragging and dropping documents (from your PC) using the "Drop zone"
- 2. Scanning documents (from any scanner or MFP)



#### **Option 1: Dragging & Dropping documents**

To upload documents to the Open Bee<sup>™</sup> Filing section, please Drag and drop your files in the Drop zone marked with dotted line:

Option 1 Drop zone -	
Drop zone	Drag & drop files HERE from your computer to upload them to the Open Bee Portal filing section
1-	>
5	/

Using this option, you can send as many documents as you want, from your PC to the Open Bee<sup>™</sup> DMS's "Filing" section.

#### **Option 2: Scanning documents**

To upload paper documents to the Open Bee<sup>™</sup> Filing section, please select here the folder (on your PC) where your scanning device drop scanned documents.

Open Bee<sup>™</sup> sync monitors permanently the folder you will select and will automatically send all incoming documents to the "**Filing**" section of your Open Bee<sup>™</sup> DMS.

Option 2	
"Scan to Open Bee Portal" Settings	
Scan folder C:\Users\claire_g.MBII\Pictures\Contr	

Once you have selected your scan folder, click the "Save" button to validate the configuration.

You can now send documents from your scanning solution directly into Open Bee<sup>™</sup> DMS' "**Filing**" section.

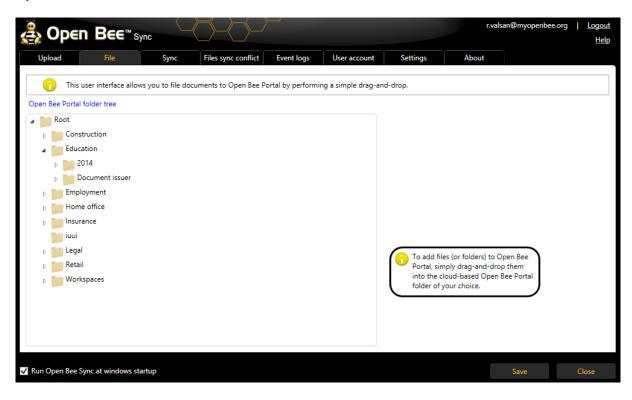
### To access your Open Bee<sup>™</sup> DMS's Filing section, click the "**link**" as shown here

op	<b>ben Bee</b> ™s	ync	$\bigcirc -\bigcirc -\bigcirc$	<u> </u>			r.va	san@myopenbee.org	<u>Logo</u> <u>He</u>
Upload	File	Sync	Files sync conflict	Event logs	User account	Settings	About		
<b>(</b> )	Option 1: Use the drop Option 2: Scan paper of	zone and/or locuments from	d documents to the filing your Open Bee™ device aded to the Open Bee Po			L I	- · ·	you have 2 options:	
)ption 1 Drop zone	Drag & drop files H to upload them to	ERE from your c	omputer						

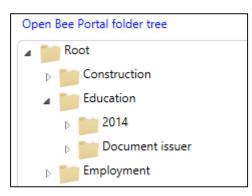
This will automatically open your Open Bee<sup>™</sup> DMS application in your default web browser.

#### The "File" tab

The "File" tab enables you to bulk upload documents and folders directly into existing folders of your Open Bee™ DMS.



When you click the small " " icon next to each folder, you can scroll down the tree and see all of the files contained in your folders.



#### File a document in the Open Bee<sup>™</sup> DMS tree

In order to file one or more documents from your computer to a specific folder of your Open Bee<sup>™</sup> DMS, just drag and drop them into the target folder.

#### Creating a folder in the Open Bee<sup>™</sup> DMS tree

You can create a folder inside another folder in the Open Bee™ DMS' tree.

To do so, right-click on a folder in the tree. A menu that contains the "Add folder" option displays.



1. Clicking "Add folder" will display the following window:

å	Folder name	×
Folder name		
ОК		Cancel

2. Type in the name of the folder you want to create:

å	Folder name	×
Folder name	2014	
ОК		Cancel

3. Finally, click "OK".



The folder is now created and appears in the Open Bee<sup>™</sup> DMS tree.

#### Downloading a document from the tree

To download a file, just double-click on the document of your choice. Once the document has been downloaded on your PC, it automatically opens.





# The "Event logs" tab

The "**Event logs**" tab gives you information about all the actions that have been performed during your synchronizations and upload operations.

Upload	File         Sync         Files sync conflict         Event logs         User account         Settings         About	
Date time	Local folder	Target folder
15-01-2014 04:04	C:\Users\claire_g.MBII\Open Bee Sync\Education\2014\BC400.docx	/Education/2014/BC400.docx
15-01-2014 04:04	C:\Users\claire_g.MBII\Open Bee Sync\Education\2014\Facture 35635ER.pdf	/Education/2014/Facture 35635ER.pdf
5-01-2014 04:04	C:\Users\claire_g.MBII\Open Bee Sync\Education\2014\Facture 356TR.pdf	/Education/2014/Facture 356TR.pdf
5-01-2014 04:04	C:\Users\claire_g.MBII\Open Bee Sync\Education\2014\Facture 425T4Z.pdf	/Education/2014/Facture 425T4Z.pdf
5-01-2014 04:04	C:\Users\claire_g.MBII\Open Bee Sync\Education\2014\Facture 5464TY.pdf	/Education/2014/Facture 5464TY.pdf
5-01-2014 04:04	C:\Users\claire_g.MBII\Open Bee Sync\Education\2014\Facture 5Z4Z.pdf	/Education/2014/Facture 5Z4Z.pdf
5-01-2014 04:04	C:\Users\claire_g.MBII\Open Bee Sync\Education\2014\FactureA24A4 - Copy (3).pdf	/Education/2014/FactureA24A4 - Copy (3).pdf
5-01-2014 04:05	C:\Users\claire_g.MBII\Open Bee Sync\Education\Document issuer\Type of document\Admission form_Document issuer_14-20-21.doc	/Education/Document issuer/Type of document/Admission form_Document issuer_14-2
5-01-2014 04:05	C:\Users\claire_g.MBII\Open Bee Sync\Education\Document issuer\Type of document\Admission form_Roxana_14-20-21.doc	/Education/Document issuer/Type of document/Admission form_Roxana_14-20-21.doc
5-01-2014 04:39	C:\Users\claire_g.MBII\Open Bee Sync\Education\2014\BC100.docx	/Education/2014/BC100.docx
5-01-2014 04:39	C:\Users\claire_g.MBII\Open Bee Sync\Education\2014\BC101.docx	/Education/2014/BC101.docx
5-01-2014 04:39	C:\Users\claire_g.MBII\Open Bee Sync\Education\2014\BC200.docx	/Education/2014/BC200.docx
5-01-2014 04:39	C:\Users\claire_g.MBII\Open Bee Sync\Education\2014\BC300.docx	/Education/2014/BC300.docx
5-01-2014 04:39	C:\Users\claire_g.MBII\Open Bee Sync\Education\2014\BC400.docx	/Education/2014/BC400.docx
5-01-2014 04:39	C:\Users\claire_g.MBII\Open Bee Sync\Education\2014\Facture 35635ER.pdf	/Education/2014/Facture 35635ER.pdf
5-01-2014 04:39	C:\Users\claire_g.MBII\Open Bee Sync\Education\2014\Facture 356TR.pdf	/Education/2014/Facture 356TR.pdf
5-01-2014 04:39	C:\Users\claire_g.MBII\Open Bee Sync\Education\2014\Facture 425T4Z.pdf	/Education/2014/Facture 425T4Z.pdf
5-01-2014 04:39	C:\Users\claire_g.MBII\Open Bee Sync\Education\2014\Facture 5464TY.pdf	/Education/2014/Facture 5464TY.pdf
5-01-2014 04:39	C:\Users\claire_g.MBII\Open Bee Sync\Education\2014\Facture 5Z4Z.pdf	/Education/2014/Facture 5Z4Z.pdf
5-01-2014 04:39	C:\Users\claire_g.MBII\Open Bee Sync\Education\2014\FactureA24A4 - Copy (3).pdf	/Education/2014/FactureA24A4 - Copy (3).pdf
5-01-2014 04:39	C:\Users\claire_g.MBII\Open Bee Sync\Education\Document issuer\Type of document\Admission form_Document issuer_14-20-21.doc	/Education/Document issuer/Type of document/Admission form_Document issuer_14-2
5-01-2014 04:39	C:\Users\claire_g.MBII\Open Bee Sync\Education\Document issuer\Type of document\Admission form_Roxana_14-20-21.doc	/Education/Document issuer/Type of document/Admission form_Roxana_14-20-21.doc
(		

• In "Date time" indicate the date and time when your document has been transferred/synchronized.



• "Local folder" displays the location of the local folder/your PC.

Local folder
C:\Users\claire_g.MBII\Desktop\Nouveau dossier
C:\Users\claire_g.MBII\Desktop\Nouveau dossier

• "Target folder" contains the name of the corresponding folder in your Open Bee™ DMS.



### • In "File name"

File name	
Transfer	
Transfer	
invoice.rtf	
invoice.rtf	

• In "Status" displays the processing status for your document.

Status
Finished
Finished

= This means that the transfer/download process for your document is finished.

**The green square** indicates that the synchronization of your document was successful. **The red square** indicates that a problem occurred during synchronization. It should

change to green during the next synchronization.



If you have encountered a sending problem, "<u>status</u>" should display:

#### "There was an error while uploading the file(s)".

In this case, the files sent from the "<u>File</u>" tab have not been transferred.

They will not be synchronized either during the next synchronization and you will have to send them again from the "File" tab.

Status
Finished
There was an error while uploading the file(s).
There was an error while uploading the file(s).
Finished
There was an error while uploading the file(s).
Finished
There was an error while uploading the file(s).

#### During a transfer or download process

Transfer	<u>In progress</u>
8	3/11 sent files

If, during a **transfer**, you click on "**In Progress**", you can cancel the transfer, providing that you are transferring several documents (the document currently being transferred cannot be cancelled).

You can interrupt the **download process** in progress for a file.

#### The following window displays:

	Confirmation	×
•	Are you sure you want to cancel the file transfer?	
	Oui Non	

Click "Yes" to validate the cancellation.

#### **Transfer finished**

The "File name" column displays the name of the document and the "Status" displays the progress of the transfer:

BC100.docx Finished

A line is added in the "Event logs".

When the download/transfer process is finished, the "In progress" "Status" will be renamed "Finished".

When the download process is finished, the document automatically opens, its name is changed into a link in the "**Event Logs**" and the document opens if you click its name.

### The "File sync conflict" tab

The "Files Sync Conflict" tab displays the synchronization conflicts between your PC and your Open Bee<sup>™</sup> DMS.

		Open Bee™ Open Bee Sync	
рО	DEN BEE™sync		r.valsan@myopenbee.org   Log
Upload	File Sync	Files sync conflict Event logs User account Set	tings About
Open Br	ee Portal file path	Local Path	
/BC102.0	docx	/BC102.docx	
/BC100.0	docx	/BC100.docx	
/BC101B	.docx	/BC101BL.docx	
/BC3008	3.docx	/BC300.docx	
Action	Apply local changes	Execute	
Action Run Open I	Apply local changes Apply Open Bee Portal changes	Execute	Säve Close

# Presence of folders in this section means that a problem occurred during synchronization.

A synchronization conflict occurs when a document exists on your workstation and in your Open Bee<sup>™</sup> DMS with different saving date (while they are identical, one is more recent than the other). In this situation, Open Bee<sup>™</sup> Sync offers you two options:

- You can keep the version present on your workstation and overwrite the version
- You can download the Open Bee<sup>™</sup> DMS version and replace the one on your workstation
- The "**Open Bee™ DMS file path**" column displays the access path to the document that encountered a synchronization problem.
- The "Local path" column displays the access path to the document that encountered a synchronization problem on your computer.
- The "Action" option offers you three choices: "Apply local changes", "Apply Open Bee™ DMS changes", "No action". Click "Execute" when you have selected an action.

Action	v	Execute
	Apply local changes	
	Apply Open Bee Portal changes	
✓ Run Open I	No action	

If the document has been deleted on one side and changed on the other, its path will appear as blank in the conflicts table. This indicated that the document no longer exists in the corresponding part.

### **Conflicts situations**

In Open Bee<sup>™</sup> Sync, conflicts arise when a file is changed on the server and the corresponding local file is changed too between 1 synchronizations.

To explain the notion of conflict, let's examine the following synchronized folders tree:

- Company

- OpenBee
  - MBII

#### **Corresponding file**

**Definition** = a file with the same name and located in the same folder on the server and locally.

*Example* – Invoice.docx file :

• The Invoice.docx file in the Company/OpenBee folder on the local computer is the corresponding file to Invoice.docx on the server

• The Invoice.docx file in the Company/OpenBee folder on the server is the corresponding file to Invoice.docx on the local computer

#### **Corresponding folder**

**Definition** = a folder with the same name and locale at the same access path locally and on the server. The path to the folder/file depends on the synchronization folder.

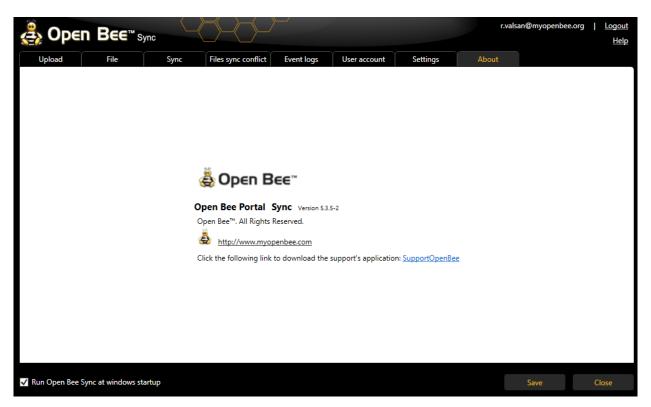
#### **Conflict situations**

- 1. File created locally; file created on the server, with the same name and in the same folder as the local file.
- **2**. File re-created (deleted and replaced by another with the same name) locally; corresponding file changed on the server.
- **3**. File re-created (deleted and replaced by another with the same name) locally; corresponding file deleted from the server.
- 4. File re-created (deleted and replaced by another with the same name) locally; corresponding file deleted, another file renamed with the same name as the local file in the corresponding folder on the server.
- **5**. File re-created (deleted and replaced by another with the same name) locally; file deleted, another file with the same name is moved into the corresponding folder on the server.
- **6**. File changed locally; corresponding file re-created (deleted and replaced by another with the same name) on the server.
- 7. File changed locally; corresponding file changed on the server.
- **8.** File changed locally; corresponding file deleted from the server.
- **9.** File changed locally; corresponding file deleted, another file renamed with the same name as the local file in the corresponding folder on the server.
- **10.** File changed locally; file deleted, another file with the same name is moved into the corresponding folder on the server.
- **11.** File deleted locally; corresponding file deleted from the server, another file created with the same name as the old one.
- **12.** File deleted locally; corresponding file changed on the server.
- **13.** File deleted locally; corresponding file deleted, another file renamed with the same name as the local file in the corresponding folder on the server.
- **14.** File deleted locally; corresponding file deleted, another file with the same name as the local file moved into the corresponding folder on the server.
- **15.** File renamed locally; corresponding file re-created (deleted and replaced by another with the same name) on the server.
- **16.** File renamed locally; corresponding file changed on the server.
- **17.** File renamed locally; corresponding file deleted from the server.
- **18.** File renamed locally; corresponding file deleted, another file renamed with the same name as the local file in the corresponding folder on the server.



- **19.** File renamed locally; corresponding file deleted, another file with the same name as the local file moved into the corresponding folder on the server
- **20.** File changed locally; corresponding file deleted from the server (file that has the same name as this one).
- **21.** File not changed locally; corresponding file deleted from the server, another file renamed with the same name, but with a different content placed into the corresponding folder on the server.
- **22.** File not changed locally; corresponding file deleted from the server, another file with the same name, but with a different content moved into the corresponding folder on the server.

## The "About" tab



In the « **About** » tab, a click on the blue link «<u>SupportOpenBee</u>» will automatically download the support application.

You will have to install the downloaded support application.

This window will appear:

😋 Open Bee Support 😑 💌		
Open Bee		
Open Bee Support		
Please tell us the following ID to connect to your desktop:		
ID Password		
1 005 961 796 ****		
Ready to connect (secure connection)		
www.teamviewer.com Cancel		

Then, give the user name (ID) to the support person who will contact you.

# **Software uninstallation**

The uninstalling section of Open Bee<sup>™</sup> Sync will guide you step by step through the software uninstallation process.

#### Before uninstalling Open Bee<sup>™</sup> Sync:

- Close all active applications, especially your anti-virus software.
- Login as an administrator on you workstation.

Description	Illustration
1. Double-click " <b>Setup</b> " to run the uninstallation file.	Image: Share View       Image: Share View         Image: Share View       Image: Share View
<ol> <li>The home page displays.</li> <li>Choose "<b>Remove Open Bee™ DMS Sync</b>" and then click "<b>Finish</b>"</li> </ol>	Image: Open Bee Sync       Image: Open Bee Sync         Welcome to the Open Bee Sync Setup Wizard       Image: Open Bee Sync         Select whether you want to repair or remove Open Bee Sync.       Image: Open Bee Sync         Image: Open Bee Sync       Image: Open Bee Sync         Image: Open Bee Sync       Image: Open Bee Sync         Image: Open Bee Sync       Image: Open Bee Sync
	Cancel < Back Finish

	🛃 Open Bee Sync 🛛 – 🗆 🗙
4. Wait until the uninstallation is done.	Removing Open Bee Sync
	Open Bee Sync is being removed. Please wait
	Cancel < Back Next >
<ul> <li>4.1 If this window displays, it means that Open Bee™ Sync is still active. Access to SysTray, click on the right button of your mouse on the Open Bee™ Sync icon, and then click "Quit".</li> <li>Make sure your Internet browser and the Sync Tool application are closed, and then click "Try Again".</li> </ul>	Open Bee Sync Files in Use     The following applications are using files which the installer must remove. You can either close the applications and click "Try Again", or click "Continue" so that the installer continues the installation, and replaces these files when your system restarts.  SyncTool (Process Id: 7080)  Iry Again Continue Exit Installation

	🛃 Open Bee Sync	- • ×
5. The installation is now finished.	Installation Complete	
Click " <b>Close</b> ".		
	Open Bee Sync has been successfully removed.	
	Click "Close" to exit.	
	Cancel < Back	Close

#### Others possibilities:

- If you have **Windows 7**, you can uninstall the software with the following method: "Start > OpenBee > OpenBeeSync > **Uninstall**".
- If you have Windows 8, in the start screen, click right on the Open Bee<sup>™</sup> Sync application. A taskbar appears on the bottom of the screen with different options. Click on "Uninstall"