

OpenIMS 4.2



Content Management Server (CMS)

User manual

**OpenSesame ICT BV
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1 Introduction

Nowadays a Content Management System (CMS) for managing an internet or intranet site is becoming a commodity. The last couple of years such systems went through an evolution. In the past Content Management Systems were often tailor-made for an organization; nowadays they are available commercial of the shelf (COTS).

OpenIMS - CMS is such a COTS system. OpenIMS - CMS gives you the possibility to maintain a complete internet and/or intranet site with your favorite word processor (Microsoft Word). Of course it is also possible to use other software, like Microsoft Excel, Microsoft PowerPoint, Xmetal and other products from OpenOffice, to create content.

By using the software that is installed locally on your pc (or network), you can go straight to work. An even bigger advantage is that you are already familiar with the software. After a short introduction you will be able to create and publish content on your internet or intranet site

OpenIMS is 100% web based so the content can be edited at any location, at home or at work.

1.1 Client specifications

A user of OpenIMS CMS must have:

- Microsoft Internet Explorer 5.0 or higher;
- An internet connection;
- Microsoft Word 2000 or higher;
- The OpenIMS transfer agent. (see www.openims.com left at the bottom)

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2 Introduction OpenIMS CMS

As mentioned in the introduction, OpenIMS is 100% web based. This means that you can perform all necessary changes and actions via your web browser. Depending on your rights within OpenIMS you can access certain parts of the system. Therefore you must first login before using OpenIMS.

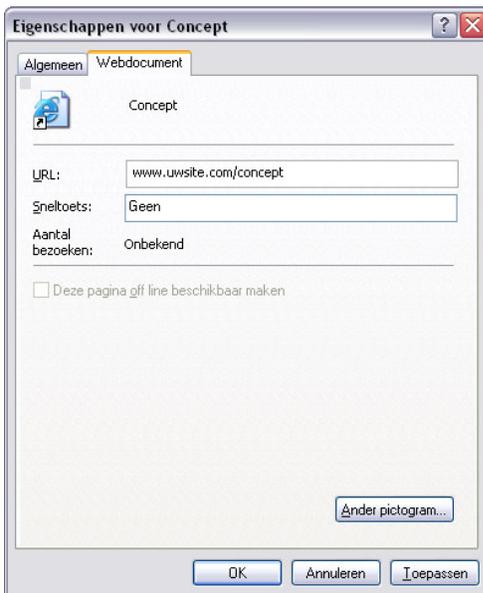
2.1 Login

You start your web browser and enter the url (<http://intranet.yourcompanyname.com>) of the domain of your website. To access the content management portal, you add the word “**CMS**” at the end of the url (<http://intranet.yourcompanyname.com/cms>). At that moment the OpenIMS login dialog appears. Now you can enter your user name and password and the OpenIMS-CMS portal will start. Furthermore, you can immediately edit your website via the word “**CONCEPT**” (<http://intranet.yourcompanyname.com/concept>).

2.1.1 Log in Automatically

You can add a button in your browser that enables you to login for a certain page without typing ‘concept’ in the url.

Step 1: create a new button (e.g named ‘concept’) in the connection menu bar in your browser (by dragging the url to the menu bar).



Step 2: Open the properties screen of the button (by clicking on the button with the right button of your mouse). In the tab ‘webdocument’ you can type the url of the site and add ‘/concept’ to it.

Step 3: Click on OK to save the properties of the button.

Now you can click on the button to enter concept mode for every page in the site (of which the url was filled in) without having to type the word “concept” in the url.

2.2 The OpenIMS-CMS portal

The portal shows you an overview of the pages that you are currently editing and of the pages that you are allowed to review and publish. You can open the page by clicking onto the hyperlink.

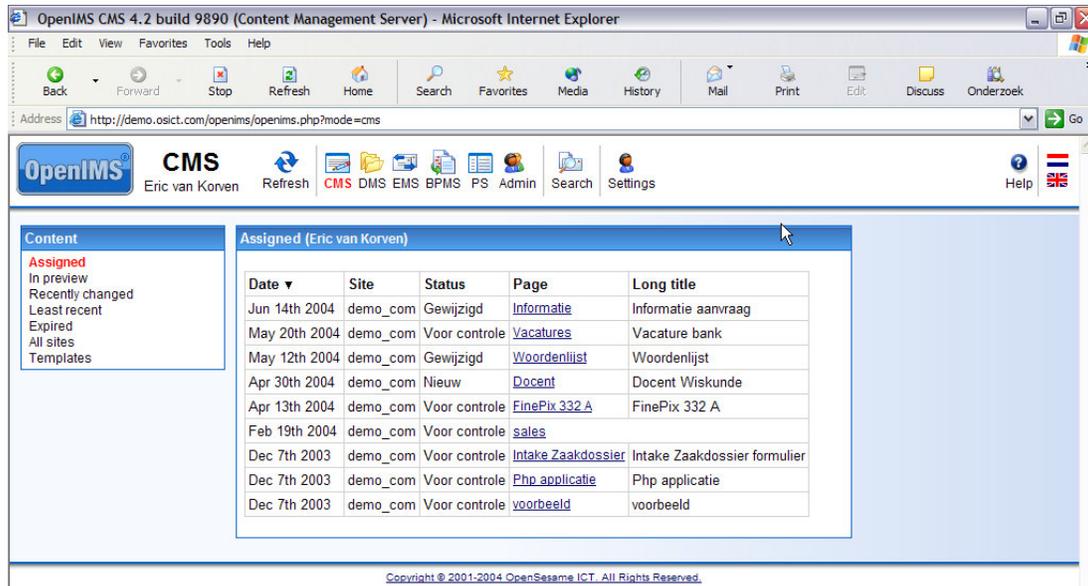
From the portal you can activate the following:

- Surfing the site in Concept mode;
- Editing a page;
- Selecting a page from the portal for review and/or publication;

- Managing documents (such as figures, pictures, PDF or other files);
- Managing design templates and document templates;
- Managing users, groups and workflows.

Portal: from the CMS portal, you will get an overview of all pages that you are currently editing or that are assigned to you by other authors. You can select a page from the overview by choosing the hyperlink, after this the page is in “concept mode” and you will be able to edit the page.

You can also use additional overviews like “In preview”, “Recently changed” or “Expired”.



2.3 Concept Mode

Next to the possibility of editing pages via the portal, you are also able to edit pages by surfing to the page directly and add ‘concept’ to the url. For example: <http://www.yourcompany.com/concept>.

In case you are not logged in yet, you need to login and the page will be opened in concept mode.

You are able to surf the site with the web browser in concept mode. At that moment the browser will be extended with an OpenIMS taskbar, see image below.

OpenIMS taskbar

Demonstratie omgeving OpenIMS Content Management Server - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Media History Mail Print Edit Discuss Onderzoek

Address http://demo.osict.com/demo_com/43e8208c8aef1d1e78fc254b16ec108f.php?activate_preview=yes Go

OpenIMS Concept Gewijzigd Eric van Korven

Site CMS Refresh Edit Properties Assign Publish Redraw History Move Up Down Remove New Help

>> Home > Vacatures > Working > Sitemap <> Printen <> Zoeken <

Webmaster
Sales
Working

Working at our company

Despite all new developments, establishing and maintaining contacts mostly remains to be done by people. That is why our company consciously invests in its main asset: its employees.

Our company's employees form a true reflection of society: students, graduates, working mothers, returnees, handicapped, early retirees. All with their own specific knowledge and (life) experience, who are deployed in the right place within our company.

Agreeable work also means creating a healthy balance between work and private life. our company tries to achieve this by planning the work in consultation with the employees. our company regularly checks employee satisfaction and uses the results of these checks to realise actual, measureable improvements of the working conditions.

By investing in working conditions, training, incentive programmes and internal communication, we motivate our employees to each day realise the ambitions of our customers.

Depending on the rights of the particular user, functions will or will not be available.

3 OpenIMS function buttons

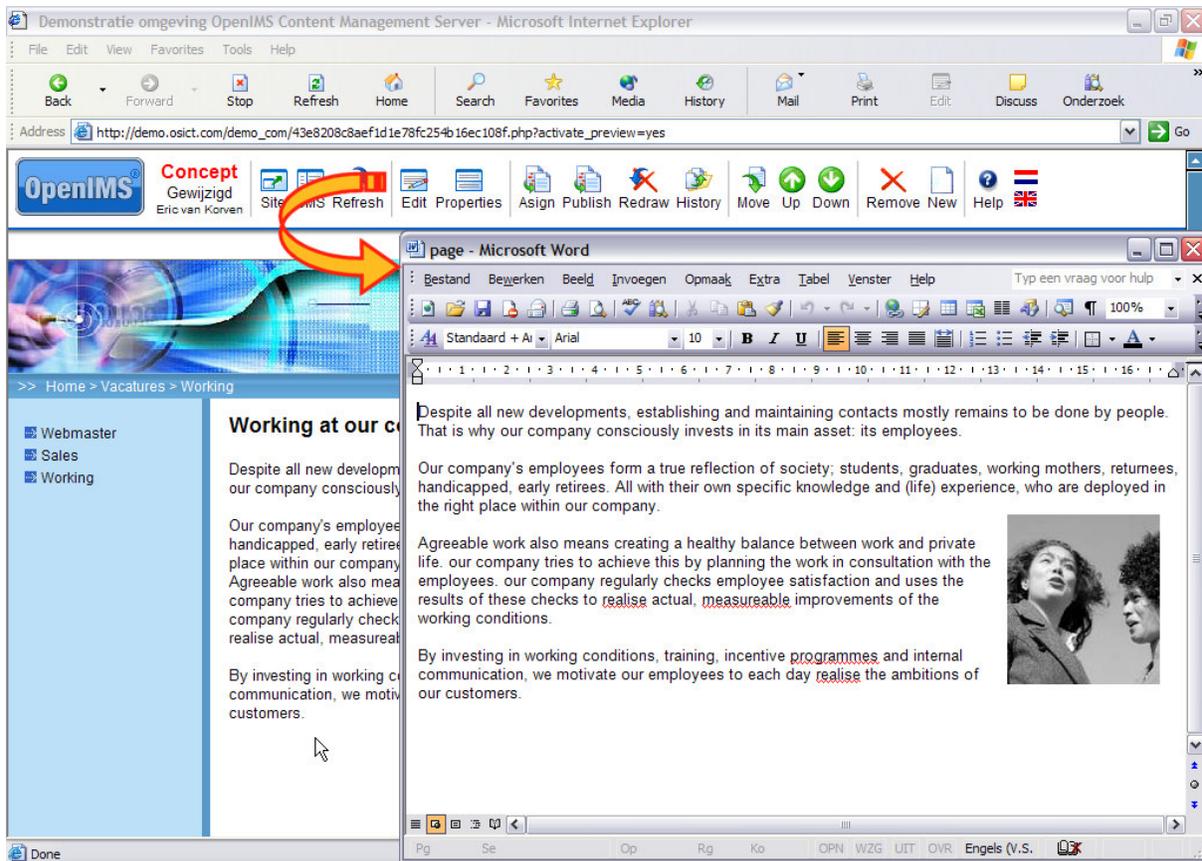
Name	Function image	Short description
Edit		You edit the content of the page with your local (Microsoft Word) editor.
Portal		You go back to the OpenIMS portal.
Down		You move the present page one down in the menu structure
Up		You move the present page one up in the menu structure
Move		You move the page to another menu level in the site.
New		You add a new page under the current page.
Delete		You remove the currently selected page.
Properties		You can change the name and the title of the page. If available you can also change the metadata.
Refresh		You refresh the browser / reload page.
Revoke		You can revoke the page from the site when it is already published
Site		You go to the website without the OpenIMS taskbar
History		This option shows a complete list of all changes made to this page by content editors. Furthermore you can restore previous version.
Publish		You can publish this version of the page.

4 Page maintenance (editing)

The most important part of a Content Management System is the way you can manage the content of your internet site. OpenIMS uses of your locally installed Microsoft Office products for content management.

4.1 Editing content

Via your web browser you surf to the page you wish to edit. You then select “Edit” in the OpenIMS taskbar (see image). Next Microsoft Word will open with the content of the specific page. Now you are able to edit the content and use all facilities that are available in Microsoft Word; for example: using a table, inserting figures or even using Microsoft Excel or Visio objects.



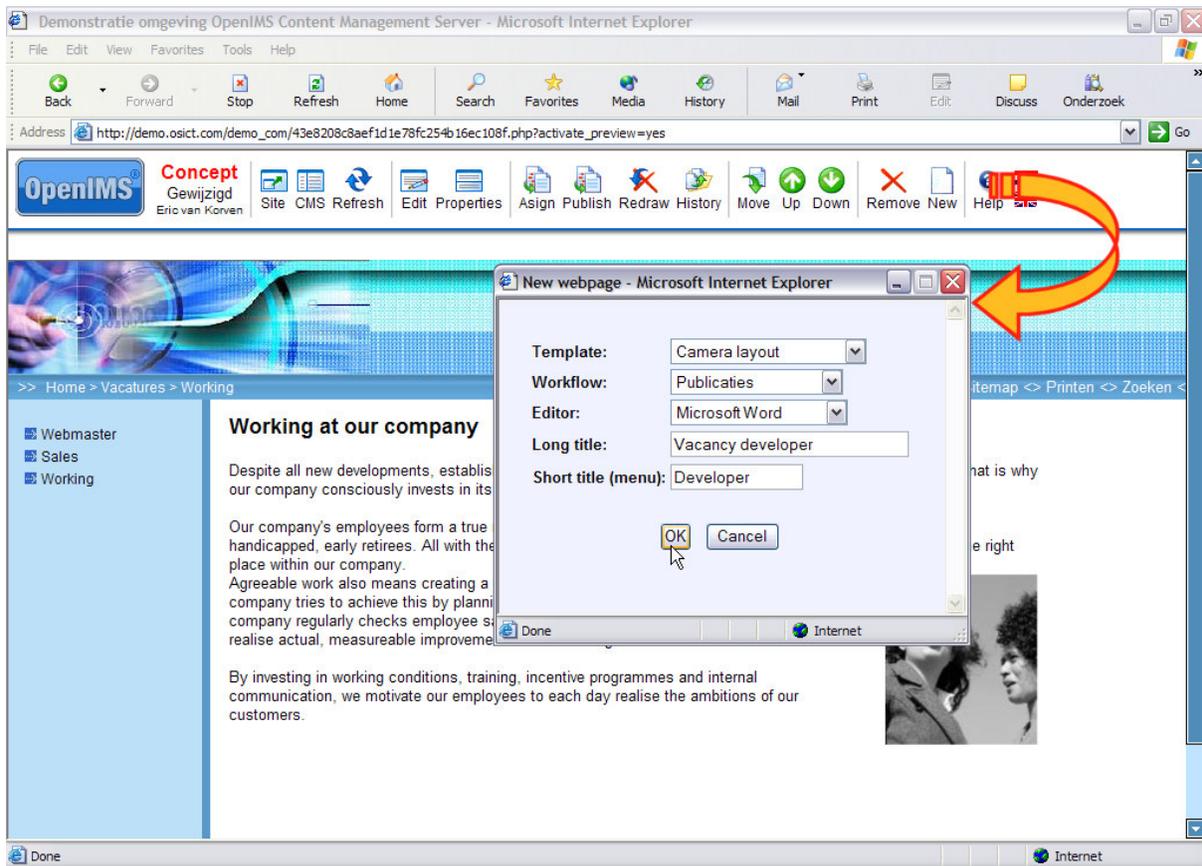
When you have finished editing, just close Microsoft Word. Save the document and the content will be transported to OpenIMS-CMS. By refreshing the page, you can look at the changes you have made, this is a preview.

OpenIMS always creates a new version of the page, so that you are able to restore the old version.

4.2 Adding a new page

When you want to add a new page to the site, go to the page where you want the new page to be placed under. After selecting “New” in the OpenIMS taskbar a dialog will appeared.

Here you can select which design template you want to use.



After you have entered the required information, confirm with the “OK” button and OpenIMS will create a new page in concept mode.

If you want to change the properties (the just entered data) in a later stage, use the option “Properties”. Then you can also enter extra template dependent metadata. For example: the publication date and other metadata. You can change the content via the “Edit” option as described in paragraph 4.1.

4.3 Deleting a page

You surf to the page you want remove and use the “Remove” button. A page can only be removed if there are no underlying (sub) pages.

4.4 Retracting a page

When you have published a page and you want to place the page back into Concept mode, you can click the button “retract”. The page will be placed back into Concept mode. You need to have the proper rights within OpenIMS to use this function.

4.5 Page properties

In the property screen you can edit the following:

- Template used.
- Workflow used.
- The long title (used as a header in the content).
- The short title (for menu).
- Publication schedule.
- Self defined metadata.

4.5.1 Templates

The template defines the layout of the internet site. As user, you are able to select which template you wish to use for a particular page. You can change the appearance by selecting another template. On a central level the webmaster defines the available templates, these will then be linked to the user groups in OpenIMS

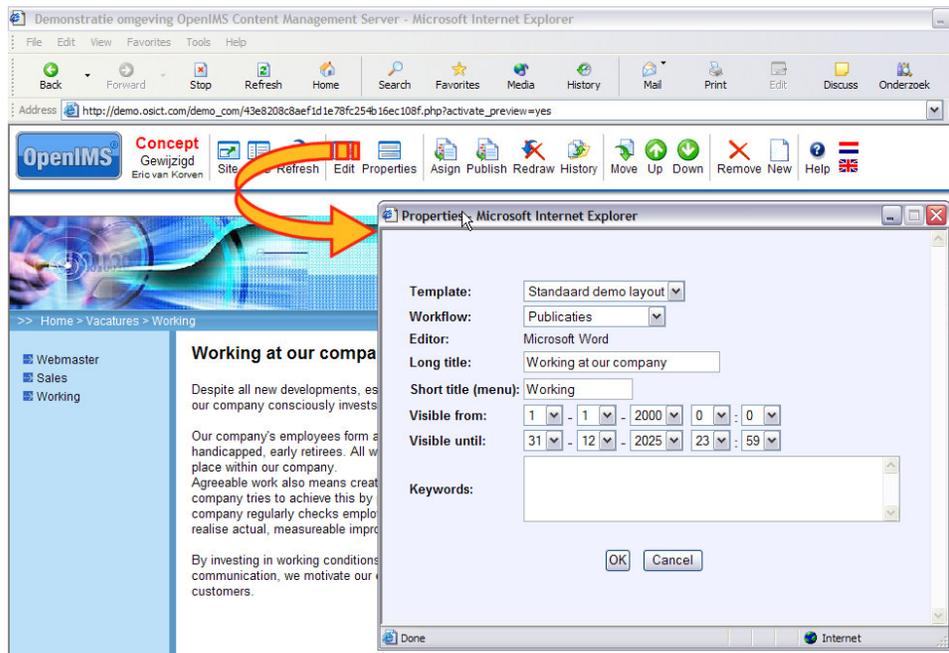
Next to the design, a webmaster can also determine the standard content for particular templates. This is the actual content which is placed in a new page when this template is selected. For example: a standard text above or at the bottom of a press release.

4.5.2 Workflow profile

A workflow records the way a page is led through an organization and who, at what stage, has which rights.

4.5.3 Page title

Every page has a long and short title. The long title is used as an introduction title (header) of a page. The short title becomes part of the navigation menu of the internet site. Since there is limited space available in a navigation menu, a clear and short page title is necessary.



4.5.4 Scheduling

This option is only visible when the webmaster has activated it. With scheduling, the publication or retraction date of a webpage can be determined and/or changed

Normally a page is immediately visible after publication. If you wish to deviate from this moment, for instance if a press release must be visible at a certain date, you can use the scheduling option. "Visible from" can be interpreted as a publication date and "Visible until" as the retraction date and time. A retracted page is no longer visible on the operational site, but it is still visible in Concept mode.

4.5.5 Metadata

Depending on the chosen template, extra metadata fields are available. The webmaster can add these fields to a particular workflow (=collections of pages).

The entered meta information will directly be indexed by the OpenIMS search engine.

5 Special functions

In the previous chapters you were given an impression on how you can manage content. The next paragraphs cover several special functions. Many of these functions are standard available in Microsoft Word, nevertheless we will describe a number of functions. More extensive information about the possibilities of Microsoft Word can be found in specific Microsoft Word documentation. The OpenIMS-CMS manual uses Microsoft Word 2003. Other versions of Microsoft Word may differ.

5.1 Adding an image

There are two ways of adding an image:

- Via the standard functions of Microsoft Word for adding images.
- Via cut/copy and paste.

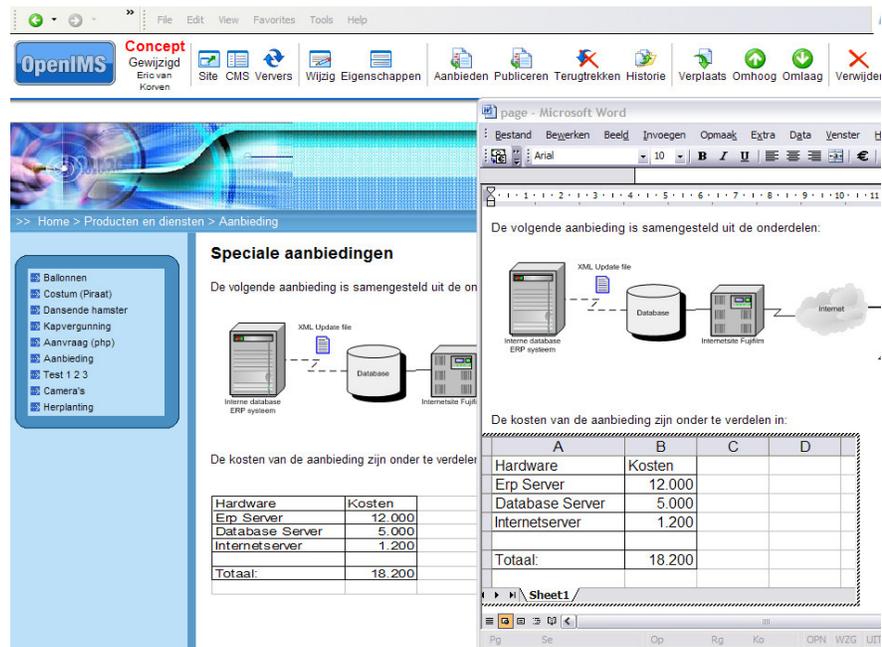
Paragraph 5.3.5 explains how to add a hyperlink to an image, and paragraph 5.3.6 explains how to add an Alt text to an image.

5.2 Using special objects

In Microsoft Word you can create objects within the content of the document. Such an object can then be changed with the accompanying editor. It can for example, be a Microsoft Excel sheet or a Microsoft Visio drawing

The different objects will be presented as images in the final webpage.

A huge advantage is that OpenIMS remembers the object definition. If you want to change the object in a later stage then you can use the accompanying editor. In this example: Microsoft Excel.



The screenshot shows the OpenIMS CMS interface. The main content area displays 'Speciale aanbiedingen' with a diagram of an ERP system architecture. The diagram includes an 'Interne database ERP systeem', a 'Database', and an 'Internetserver Fujitsu' connected to the 'Internet'. Below the diagram is a table showing the cost breakdown of the offer:

Hardware	Kosten
Erp Server	12.000
Database Server	5.000
Internetserver	1.200
Totaal:	18.200

An Excel spreadsheet is overlaid on this table, showing the same data in a grid format:

A	B	C	D
Hardware	Kosten		
Erp Server	12.000		
Database Server	5.000		
Internetserver	1.200		
Totaal:	18.200		

5.3 Adding a hyperlink

You can insert a hyperlink (link to another page, a document in OpenIMS-DMS or to another internet site) with help of the standard options within Microsoft Word.

Note: for a link to a website outside your own domain, use an absolute hyperlink. For a link to a page within your domain, use a relative link.

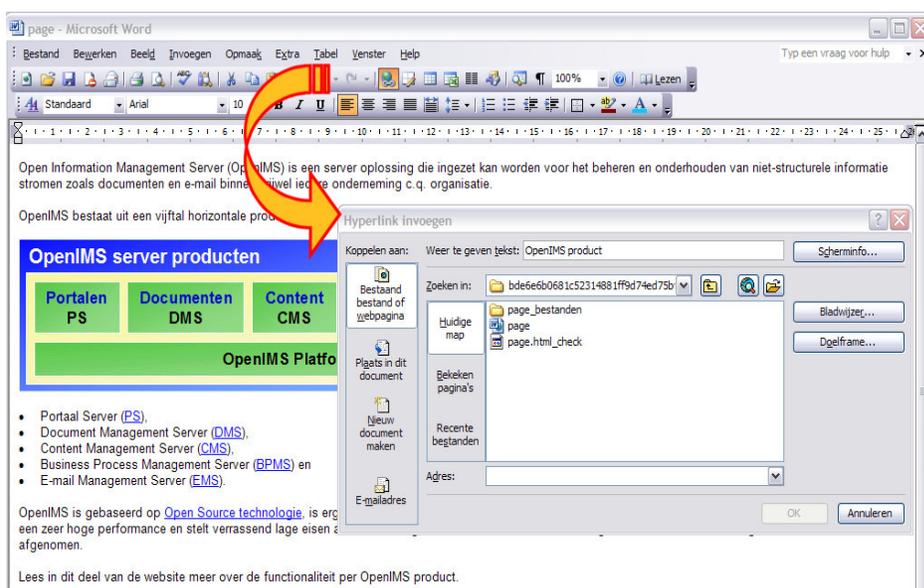
Example absolute link: <http://www.openims.com/documents/manual.htm>

Example relative link: </documents/manual.htm>

5.3.1 Adding a hyperlink to another webpage

Go to the page within OpenIMS-CMS (in concept mode) where you want to insert a hyperlink. Open a new Microsoft Internet Explore webbrowser and surf to the page you want apply the link to. This can be a page within your intranet or website; of course you can also create a link to an external internet site.

Go back to the page where you want to insert the hyperlink and open this page by selecting “Edit”. Now Microsoft Word will start and you can select the text that has to become a hyperlink. After selecting this text, select “Insert Hyperlink” within Microsoft Word. You can enter the internet address of the page in the “Address” field (e.g. www.openims.com) or copy and paste the hyperlink to the external web page from the other Internet Explorer window.



5.3.2 Opening a webpage in a new window after selecting the hyperlink

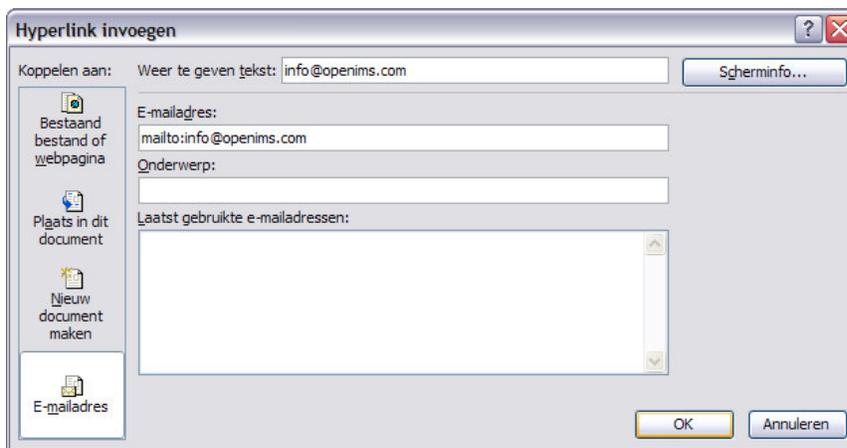
When creating a hyperlink, you can define that when a visitor to the site selects the hyperlink, this page is opened in a new browser window. Choose on the right-hand side the option “target frame...” and you will enter a dialog where you can choose the option “New window”. Select this option and click “OK”.

This option is not available in Microsoft Word 2004 for Macintosh users.

5.3.3 Inserting an e-mail address

You can also process e-mail addresses in your texts. When a visitor selects this address the e-mail client will automatically start.

Go to the position where you want to insert the e-mail address, select “Insert hyperlink” and choose option “E-mailadress” on the left side. You will then see the following dialog:



In the field “Text to display” you can enter the text that will be presented to the visitor. There are no restrictions.

In the field “E-mailadress” enter the e-mail address, preceded by the text “mailto:” otherwise the address won’t be accessible.

You can provide the e-mail with a standard subject, for instance “Information request”.

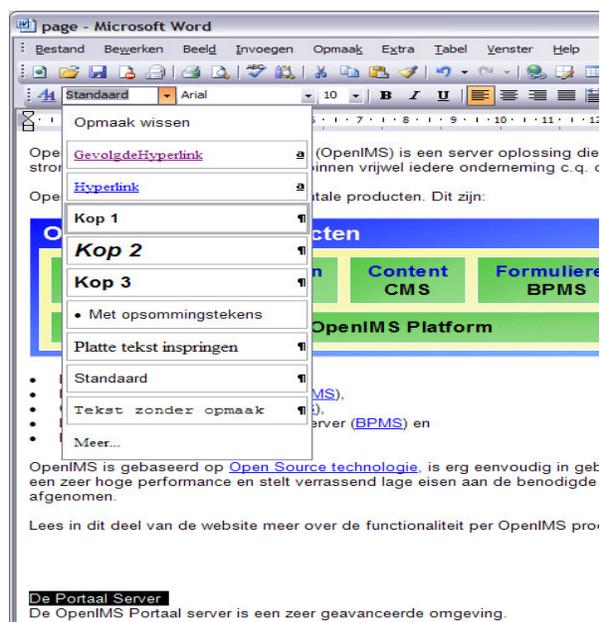
5.3.4 Creating bookmarks (hyperlinks within a page)

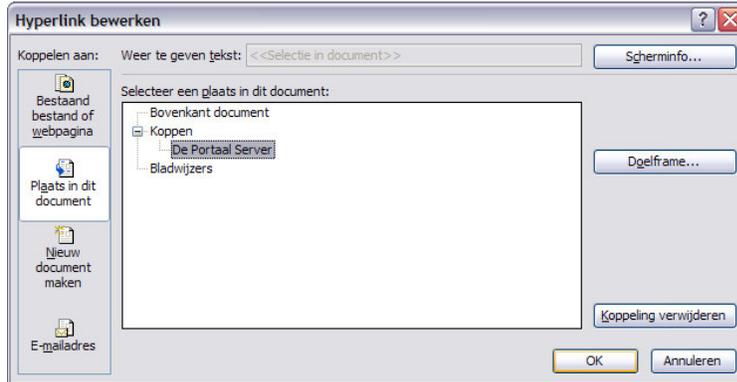
Via this option you are able to define hyperlinks to text blocks within the same page. There are two ways to realize this. The first way is by placing a so-called bookmarks, the other way is through providing the text with a header or chapter classification.

When you want to make use of internal hyperlinks (bookmarks), they must be predefined before you can use them. When these bookmarks are defined you can use the “Insert Hyperlink” dialog.

In the next example a header is made of the text “The Portal Server”.

Now you can use the “Insert Hyperlink” dialog to place a link to the bookmark, by using the option “position in the document”





By selection the text, you can place a link to this text within the document

We recommend that you use one of the two possibilities.

5.3.5 Adding a hyperlink to an image

To add a hyperlink to an image, select the image and select "Insert Hyperlink" so you can enter the hyperlink.

5.3.6 Alt texts (Hyperlink / Image)

You can provide a hyperlink or images with extra information that is shown when a visitor places the mouse over the hyperlink or image (Alt tag).

To add an alt tag to a hyperlink, you can insert this through the "Hyperlink screen".



To add an alt tag to an image, you first select the image and use the right mouse button to select the option "Format Image" and after that the tab "Web" in which you can enter the text.



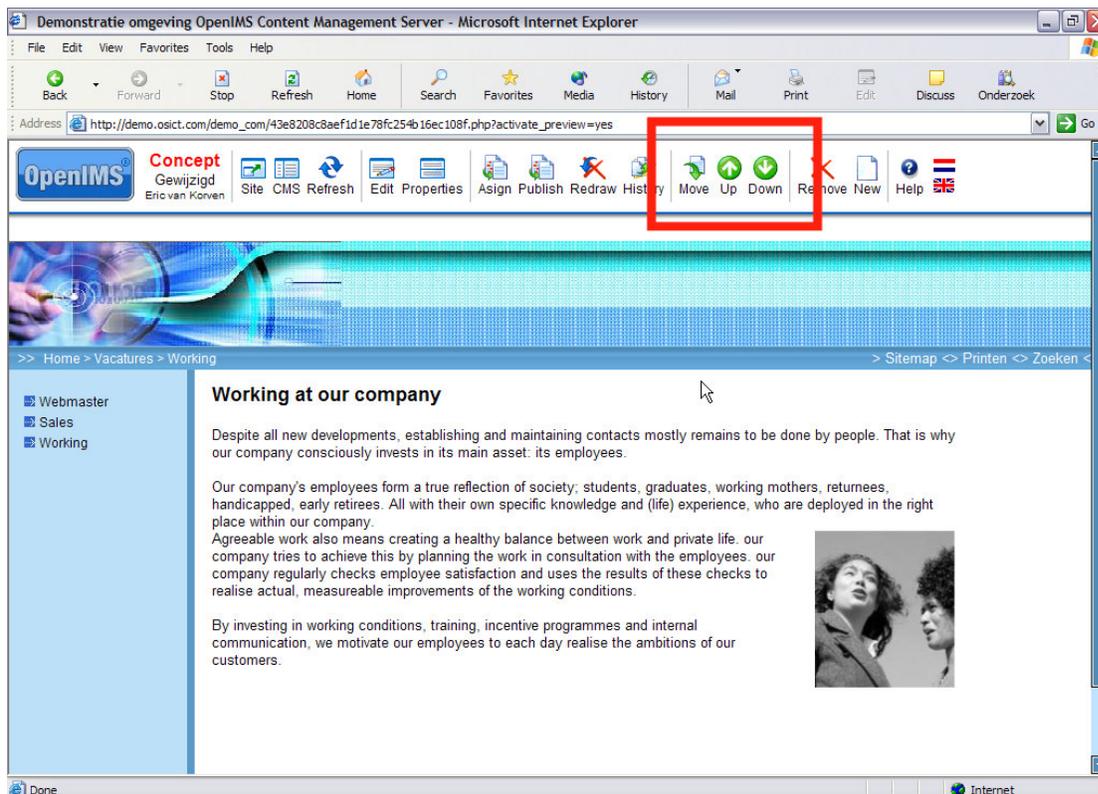
The Alt text is used to make the internet site more accessible for visually impaired visitors. Specialized browsers will show the alt text instead of the image.



This option is not available in Microsoft Word 2004 for Macintosh

5.4 Moving a page

Within OpenIMS, there are two ways to move pages.



5.4.1 Changing the page order

When you want to change the page order (and underlying pages) within the menu structure, you can select the specific page and change the order by means of Up and Down.

5.4.2 Moving a page

The function “Move” can be used to move a page (and underlying pages) hierarchically. (change the level)

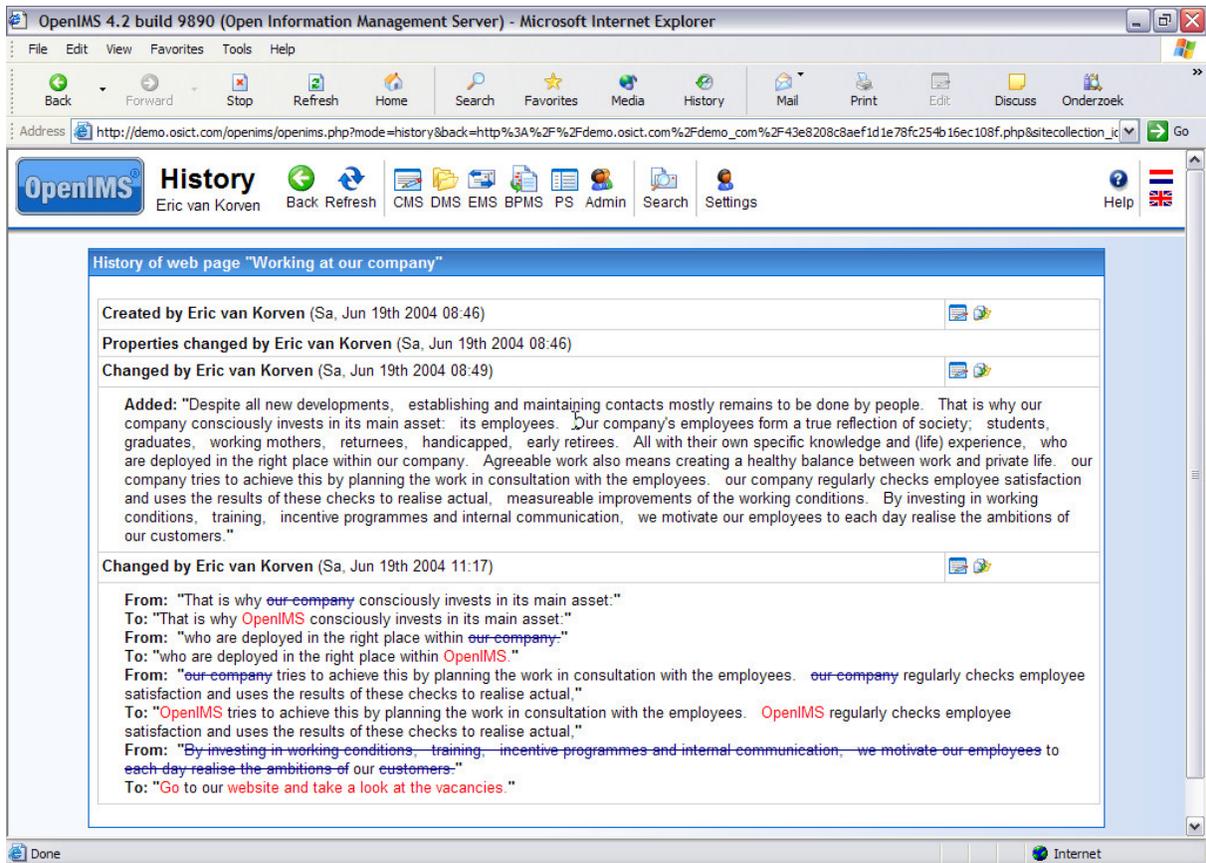
Surf to the page that you want move. Select “Move” to get into the move mode, two new options will appear: “Here” and “Stop” (see image). Then surf to the location to where you want page to be moved.

With “Stop” you cancel the action. With the function “Here” the page will be placed at this location in the menu structure.



5.5 History

OpenIMS has an advanced history mechanism. This function tracks, records and determines every change which has been made to the page. Furthermore you can view the exact textual changes between versions, or you can look at an older version or even restore (roll back) the older version.



	View this version
	Restore this version (placed in preview mode)

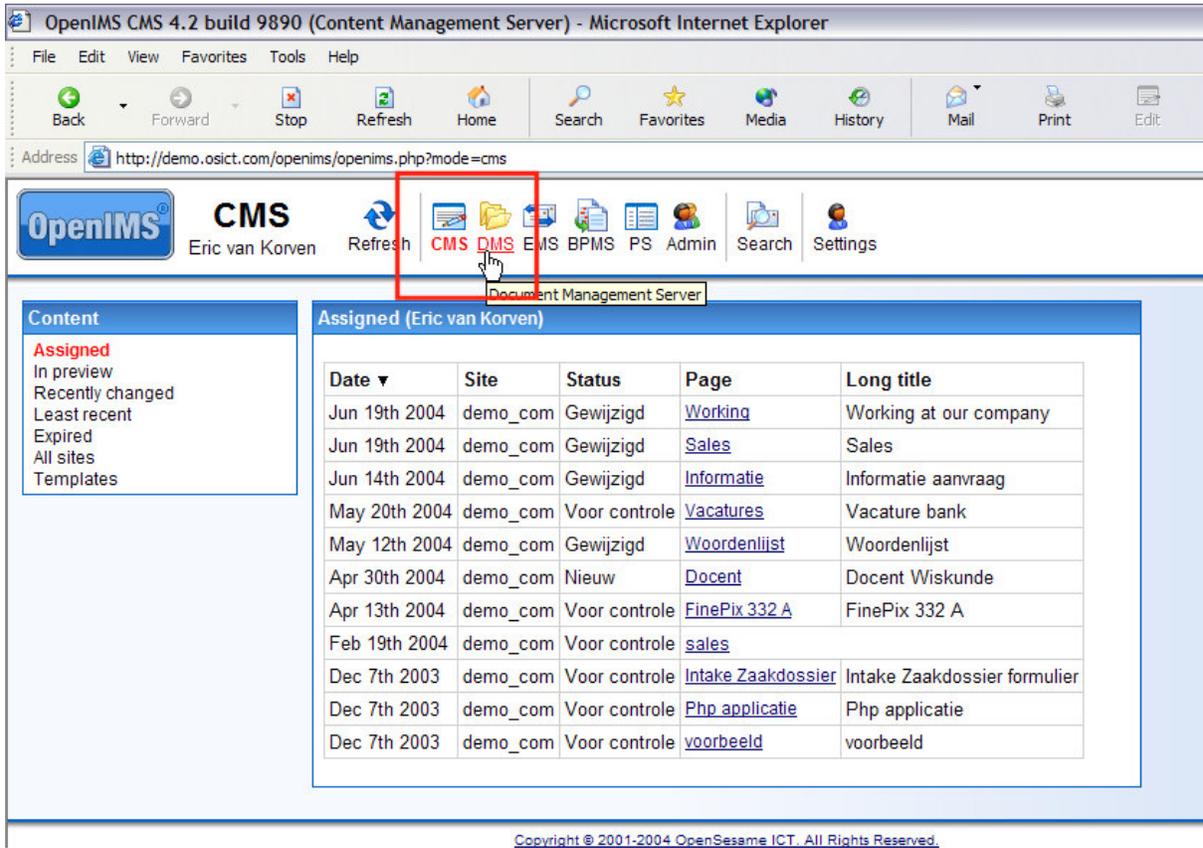
5.6 Documents placement (DMS)

This paragraph contains a compact description of OpenIMS-DMS in relation to OpenIMS-CMS.

5.6.1 Managing multi media files

Next to an advanced system to manage web content, OpenIMS also offers a Document Management System (separate product) in which different kinds of files can be stored, for instance graphic elements, multimedia files or documents (PDF) that can be used within the internet site.

You can go from the CMS portal to the DMS by selecting the option “DMS”.



OpenIMS CMS 4.2 build 9890 (Content Management Server) - Microsoft Internet Explorer

Address: http://demo.osict.com/openims/openims.php?mode=cms

OpenIMS CMS Eric van Korven Refresh CMS DMS EMS BPMS PS Admin Search Settings

Content Management Server

Content

- Assigned
- In preview
- Recently changed
- Least recent
- Expired
- All sites
- Templates

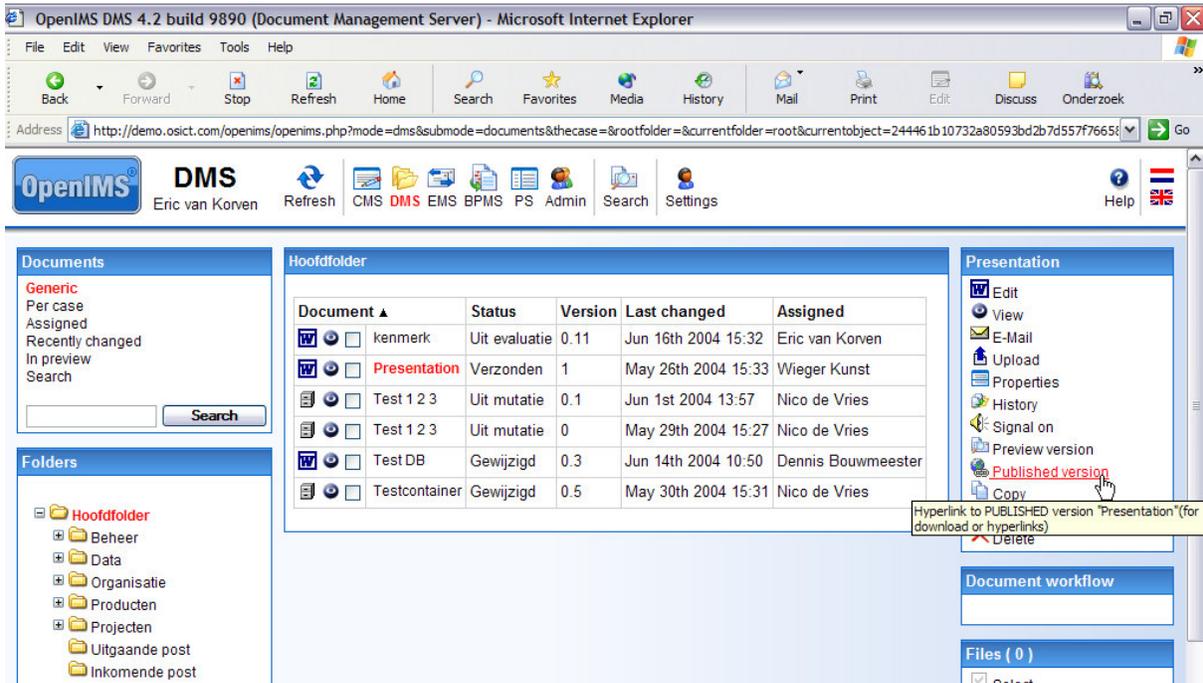
Assigned (Eric van Korven)

Date ▼	Site	Status	Page	Long title
Jun 19th 2004	demo_com	Gewijzigd	Working	Working at our company
Jun 19th 2004	demo_com	Gewijzigd	Sales	Sales
Jun 14th 2004	demo_com	Gewijzigd	Informatie	Informatie aanvraag
May 20th 2004	demo_com	Voor controle	Vacatures	Vacature bank
May 12th 2004	demo_com	Gewijzigd	Woordenlijst	Woordenlijst
Apr 30th 2004	demo_com	Nieuw	Docent	Docent Wiskunde
Apr 13th 2004	demo_com	Voor controle	FinePix 332 A	FinePix 332 A
Feb 19th 2004	demo_com	Voor controle	sales	
Dec 7th 2003	demo_com	Voor controle	Intake Zaakdossier	Intake Zaakdossier formulier
Dec 7th 2003	demo_com	Voor controle	Php applicatie	Php applicatie
Dec 7th 2003	demo_com	Voor controle	voorbeeld	voorbeeld

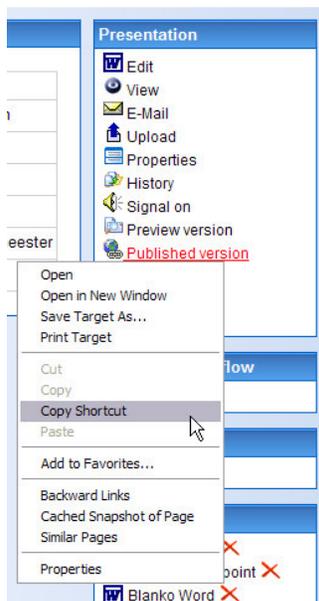
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5.6.2 Linking to a document

Select the name of the document, on the right-hand side the action menu appears. This action menu shows the option “Published version”. This is the hyperlink to the latest published version of the document.



Click on the right mouse button for the option “Copy Shortcut”.



Now that you have a direct link to the document, you can insert the hyperlink via the “Insert hyperlink” dialog.

5.7 Web forms

The OpenIMS web forms use fields that have been registered at a central level. The fields are describes by so-called placeholders. [[[Field name]]].

A form can be managed with Microsoft Word, just like the content. Within Word, a form could look like this:

Name	[[[name]]]
Phone	[[[phone number]]]
	[[[OK:Send]]] [[[CANCEL:delete]]]

Seen from the website, the placeholders are being replaces by fields or buttons, depending on the function behind the placeholder.

5.7.1 A new form

A new form (a page with a form property) can be placed on a random location within the site. You select "New" and then choose "Standard form"

The new page is created as a form and is added to the navigation menu. The standard properties of a form will appear in the centre of the new page (see image below)

It is also possible to create a template with standard fields.

After adding a form, the next options are available:

Fields (§ 5.7.2)	Overview of all available fields
Contents (§ 5.7.3)	Editing the form's lay-out and content
Confirmation (§ 5.7.4)	Adding a confirmation text
Signaling (§ 5.7.5)	Notification e-mail addresses
Entered data (§ 5.7.6)	Data sheet with all the filled out forms

You can select the different options by clicking on the option's hyperlink.

5.7.2 Fields

Here you get an overview of all available fields that can be used for a web form. Fields are created by the webmaster. You can find more information in the "OpenIMS management" manual.

5.7.3 Content

Via "content" you can edit the form with Microsoft Word. When you select the fields you want to use, OpenIMS will create a form, based on your selection.

Based on the functions: [[[OK:send]]] and [[[CANCEL:delete]]], actions will be executed.

The button text (send/delete) is free definable.

The result can be reviewed directly with the web browser.



5.7.4 Confirmation

When you use this option, you can create a text message that will appear after a visitor has pressed the “OK” button. For example: you could leave a “thank you” message for the visitor.

The text can be edited in Microsoft Word.

5.7.5 Signalling

OpenIMS will send a notification when a form has been filled out. In the signalling field, the receiver of the notification can be defined. For example: info@jansen.com or jan@jansen.com

Note: in case the notification will be sent to different e-mail addresses, please separate these addresses with a comma.

5.7.6 Entered data

When using this function, you can look at an excel (CSV) file which contains all the data that has been entered by visitors.

The file can be processed locally (for example: mail merge)

5.8 OpenIMS inline WYSIWYG HTML Editor

This inline WYSIWYG editor is an alternative for Microsoft Word. You can activate this editor via “properties screen”

You can edit a webpage with both Microsoft Word and this editor.

This editor has only been tested running under Microsoft Explorer for Windows.

In case you want to edit a page and this editor has been activated, you will see the following screen:

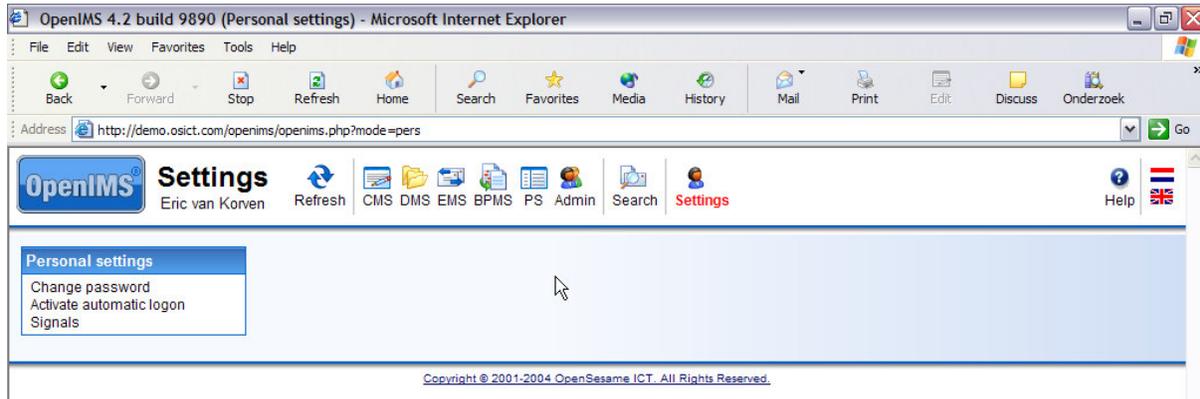
“When you have finished editing the web content, you can save the changes by selecting the “Save” icon”

5.8.1 Inserting an image

You can insert an image by using the “Image” button.

6 Personal settings

OpenIMS contains a number of personal settings. These are covered in this chapter.



6.1 Change password

When you want to change your password you can select this option. A password should not be too simple like for instance 1234. OpenIMS checks the password. A combination of numbers and characters, with a minimal length of 6 characters would be ideal.

6.2 Activating automatic login

When you always use OpenIMS on the same computer it is possible to activate automatic login. If you start your PC on the business network you no longer need to login on OpenIMS.

This functionality is computer dependent. If you use another computer on another location you need to activate this option on the other computer.

Remark: don't use this option if the computer is used by different people. Otherwise people can use OpenIMS using your account.



7 OpenIMS Transfer Agent

Before you can edit pages with OpenIMS – CMS you must install the OpenIMS Transfer Agent. The Transfer Agent transports content to and from your PC.

7.1 Installing the OpenIMS Transfer Agent

The latest version of the OpenIMS Transfer Agent can be found on www.openims.com. Below the left menu you can select and install the latest version of the OpenIMS Transfer Agent.

8 Special modules

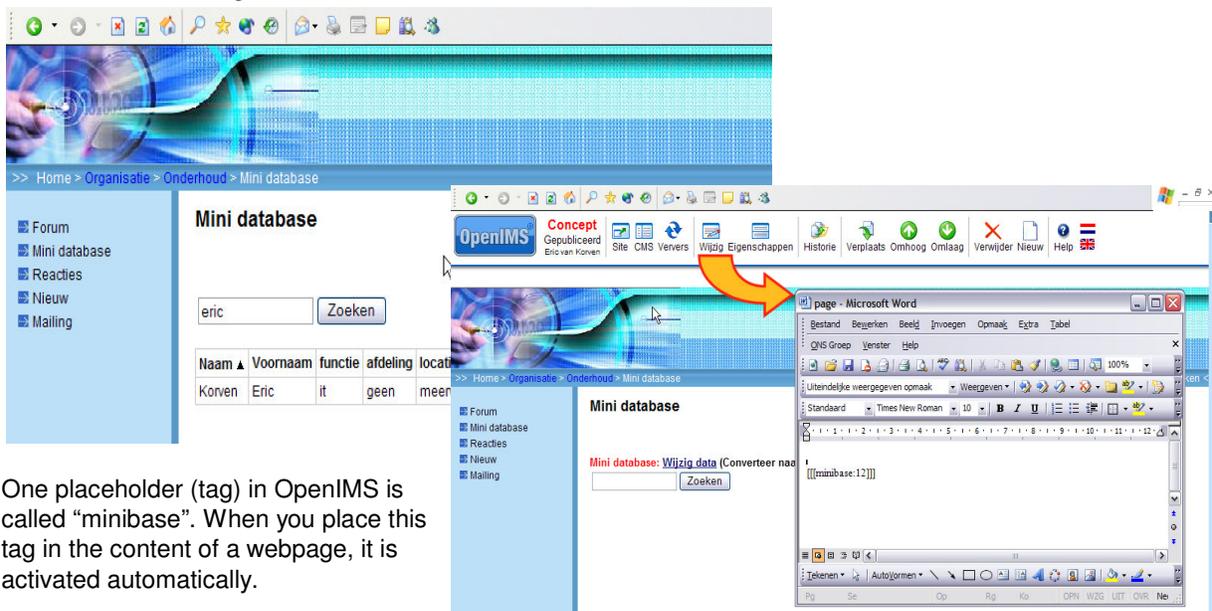
OpenIMS CMS has a library available with different (standard) components that can be (de)activated at will. When activated, certain components behave a certain way which can be adjusted to the specific users' wishes. A few of these components will be explained in the following paragraphs.

8.1 Minibase module

The minibase module gives an organization the possibility to make a list with information available with a search function as entrance.

Examples are: lists of addressed, telephone numbers, subscriptions, etc.

The list can be managed in Microsoft Excel.



One placeholder (tag) in OpenIMS is called “minibase”. When you place this tag in the content of a webpage, it is activated automatically.

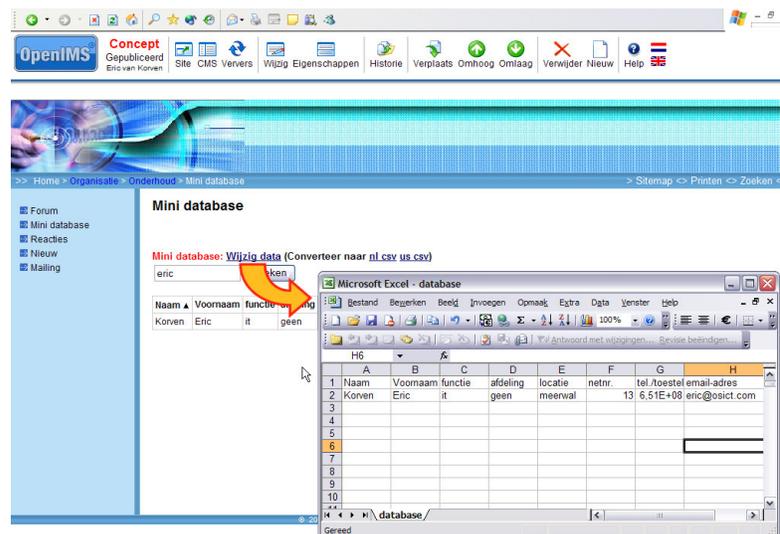
The definition of a minibase consists of the font size. For example `[[[minibase:12]]]` means that the minibase will be shown 12 pts large in the content, see image.

In concept mode the module has additional management functions (see image on the right)

Of course you can also place normal content on the page.

You can manage the content and the size of the minibase in Microsoft Excel, by using the option “Edit data”. You are able to transfer data (by means of exporting or copy/paste) from an existing excel document to the minibase.

When you have finished, you can



close excel and choose "Save changes". Now the edited data is directly available to the visitors of the website. You can place the minibase at any given webpage.

Note: editing the minibase is only possible under Windows. Mac users can only search the minibase.

8.2 Document connector module

With the document connector module you are able to access published documents that are located in a certain directory of OpenIMS DMS, on a website (OpenIMS CMS)

If you create and publish a new document or edit and publish an existing document, the overview will automatically be updated. Therefore visitors of the webpage will only have access to the last updated and approved version of these documents. For example: manuals and company rules.

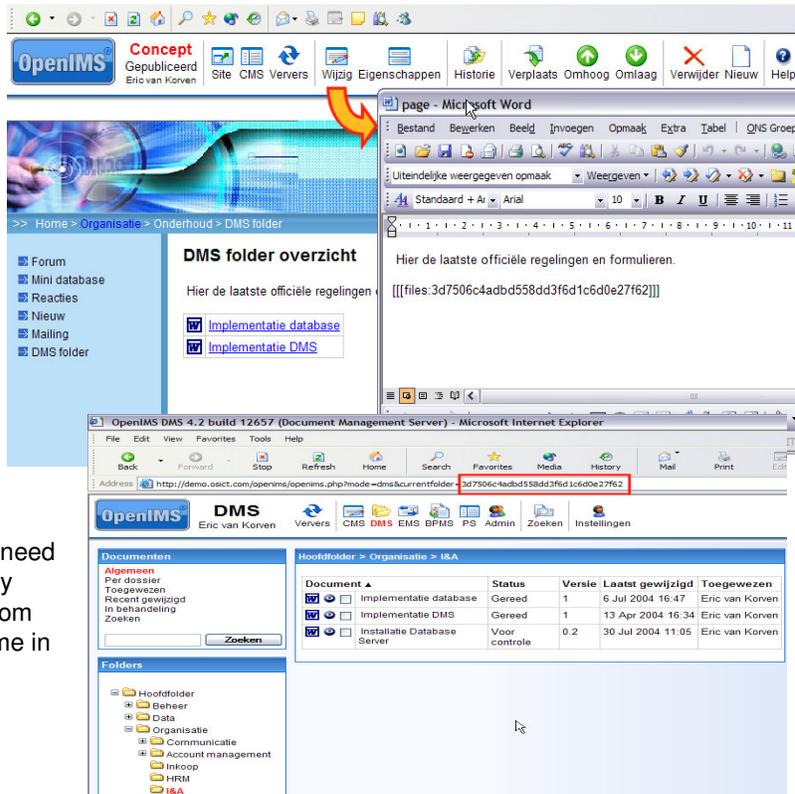


One tag in OpenIMS is called "Files". When you place this tag in the content of a webpage, it is activated automatically.

Definition: `[[[files:<<current folder>>]]]`.

Example: `[[[files:3d7506c4ad62]]]`. After you have placed this tag in the content (see image right), the function appears (see image above). Of course you can also place normal content on the page. It is also possible to place more than one tag on a webpage.

The number, "currentfolder", that you need as a reference to the accurate directory within OpenIMS DMS, you can copy from the browser address bar. (see red frame in image).



8.3 Jump

Open IMS offers you the possibility to link pages directly to another page in the same website or a different website. The page that is linked to will open in the same window.

In order to link the page automatically, you have to include the following code in the content of the page.

```
[[[jump:http://urlofthesite]]]
```

If you want to create a direct link to the OpenIMS website For example, the code needs to be as follows:

```
[[[jump:http://www.openims.com]]]
```

The jump code has to be activated in OpenIMS. Please contact your functional administrator to verify this.

8.4 Superjump

The Superjump code is similar to the jump functionality. The only difference is that the page that is jumped to will open in a new window.

In order to link the page automatically and open it in a new window, you have to include the following code in the content of the page.

```
[[[superjump:http://urlofthesite]]]
```

The superjump code has to be activated in OpenIMS. Please contact your functional administrator to verify this.