



## **DMSplus for Microsoft SharePoint 2010**

A professional add-on for DMS (Document Management System) solutions based on Microsoft SharePoint 2010

## **DMSplus Overview**

DMSplus is a powerful enhancement based on Microsoft SharePoint 2010. The additional features provided by DMSplus empower SharePoint 2010 to be a state of the art document management solution framework.

General Document Management with SharePoint 2010 means to create, maintain, publish, archive and find documents. SharePoint 2010 offers several features and functions to support document management processes.

Within sophisticated areas of document management, SharePoint 2010 does not provide specific but important features out of the box.

What is DMSplus for SharePoint 2010?

DMSplus for SharePoint 2010 extends the SharePoint 2010 functions for dealing with documents.

DMSplus for SharePoint 2010 is adding the following functions:

- To have a unique HARDLINK to a document regardless if the document was moved
- A VIRTUAL DOCUMENT, to group documents (with different versions) within one document
- Enhanced usability
- Security for document libraries
- Archiving of documents

## **DMSplus HARDLINK Module**

A DMSplus HARDLINK is a URL which points always to a specific document (version), regardless if the document was renamed or moved to another location.

### **Functions**

The HARDLINK feature can be activated on every document library.

After activation the HARDLINK of a document can be copied to clipboard by selecting the HARDLINK page from the context menu.

The user can choose between different options:

- Link to the current version
- Link to the last major version
- Link to a specific version

Differences to SharePoint 2010 Document ID:

- Document ID is only unique on site collection level. Any documents moved to different site collection will have new, different from the original, Document ID.
- SharePoint 2010 does not provide any link which refers to a specific version of the document with the Document ID.
- The out-of-the-box feature, Document ID, is only available on SharePoint 2010 Standard and Enterprise Editions

## **DMSplus VIRTUAL DOCUMENT Module**

A VIRTUAL DOCUMENT let you group documents from different locations and different versions. It can be used to put baseline documents together and to “freeze” them. It’s also possible to download the VIRTUAL DOCUMENT as a zip file. In the zip file you will then find all documents with exactly the version which have been defined in the VIRTUAL DOCUMENT.

### **Functions**

- Collect references (HARDLINK) of documents within one VIRTUAL DOCUMENT
- Folders can be used inside a VIRTUAL DOCUMENT
- Add documents from any document library
- Views can be used to filter documents of a selected document library
- Download a zip file with all containing documents
- Freeze documents either to a specific version or the last major version
- A VIRTUAL DOCUMENT can only be set to a major version if all containing documents have a major version

### Differences to SharePoint 2010 Document Sets

- Document Sets are only available in SharePoint 2010 Standard or Enterprise
- Document Sets stores real documents inside which means that a document has to be exactly in one Document Set. With VIRTUAL DOCUMENTs only references to documents (see module HARDLINK) are stored which let you have multiple VIRTUAL DOCUMENTs referring to one document (but perhaps in different versions). No need to copy the original document.
- In Document Sets it is not possible to freeze documents to a specific version
- Documents Sets doesn’t allow the use of folders

## **DMSplus FUNCTIONS Module**

The module DMSplus FUNCTIONS adds a set of function to document libraries to make working with documents easier. The functions are added either on document level (context menu) or on library level (ribbon bar).

### **Functions on document level (context menu)**

- Let you "Copy" a document to another folder, library, site or site collection
- The function "Move" lets you move a document to another folder, library, site or site collection with all metadata and versions
- "View Permissions" allows you to show permissions on a document and resolves groups to see which persons have access
- "Upload as new version" (including file type compatibility) allows you to upload a local document (with a different name) over an existing document. It is also possible to upload a document with a different suffix, as long it is a compatible document. E.g. overwrite an existing Specification.doc (Word 2003 Type) with SpecificationNew.docx (Word 2010 Type).
- "Rename" a document let you rename a document
- An "Open document for editing" button in view property dialog let you open the document for editing.

### **Functions on library level (ribbon bar)**

- "Check-in multiple documents" displays all documents checked out by the current user and allow to check-in multiple documents at once.

## **DMSplus ARCHIVE Module**

The module DMSplus ARCHIVE creates an archive document library on site level which can be used as a safe store of documents. This store protects the containing documents against modifications and deletion.

### **Functions**

- An archive document library which is protected against deletion is created on activation of this module automatically
- A "Move to Archive" function to context menu on a document is added
- An archived document has the same access permissions (people and groups) as before except all access is read only
- A site collection admin can use restore on a document to move it back to original location
- The DMSplus ARCHIVE works on all SharePoint 2010 editions also on SharePoint Foundation

## **DMSplus PERMISSIONS Module**

The module PERMISSIONS adds a list to a site to view, check and maintain permissions on document libraries. It also allows securing libraries to prevent the deletion of documents once they have a major version.

### **Functions**

- Permission list shows all folders where the permission inheritance is different from the parent. This allows users to see easily who has access on which folders.
- Simplified permission handling within permission list allows changing permissions on folder level of document libraries
- On activation it checks that versioning is enabled and prevents deletion of documents if they have a major version

## **Technical requirements / details of DMSplus:**

- Runs on
  - Microsoft SharePoint 2010 Foundation
  - Microsoft SharePoint 2010 Standard
  - Microsoft SharePoint 2010 Enterprise Edition
- Each Module of DMSplus is delivered as a wsp file (SharePoint Solution Package)
- Modules can be activated independently (except VIRTUAL DOCUMENT which needs the HARDLINK module)

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### Footnote:

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