Document Management Module

The **Document Management** module (DM) manages repositories, templates, metadata structures, and document handling workflows. It is used when business processes require governed document storage and retrieval.

Its most important use case is the **digital personnel file**[1]: a per-client identical folder structure for each employee (usually in Alfresco), visible in HR-Expert under "Documents" and exposable in partial views via dm_folderExplorer.

Use cases

- Configure document repositories
- Define and maintain document templates
- Define metadata structures for classification and retrieval
- Browse document folders/repositories (Folder Explorer)
- Configure split-PDF behavior for document processing scenarios

Typical roles

- Document administrator
- Compliance officer
- Backoffice user handling attachments
- Support/integration engineer

Customer value

- Improves traceability and consistency in document-centric processes
- Supports integration with enterprise document backends (e.g. Alfresco)
- Reduces manual handling effort in attachment-heavy workflows

Configuration

The main configurable action is the **Folder Explorer**, with options for read-only mode, default tree visibility, page size, repository/metadata-structure source, hidden folders, and metadata-folder behavior. For personnel-file configuration details, see Digital Personnel File[2].

Further configuration areas:

- Create and edit **repositories**
- Create and edit **document templates**
- Create and edit **metadata structures**

Jobs

The DM module has an extensive job layer that directly reflects common customer operations:

- **bindFoldersToMetaStructure** – binds repository folders to a metadata structure (including initial bind and test actions)
- **convertAlfrescoObjectsToDmObjects** – converts Alfresco objects into DM objects (with repository/base path, test, and statistics options)
- **deleteDocumentsFromMetaFolders** – deletes documents from metadata folders based on client, metadata folder, and age windows

- **propagateMetaStructure** – propagates a metadata structure to a target repository

1. /daisy/webdesk-manual-en/admin/11522-dsy/11542-dsy.html
2. /daisy/webdesk-manual-en/admin/11522-dsy/11542-dsy.html