



Contuitive DMS Guide

Version 2.0

Introduction

Welcome to Contuitive DMS: Where Your Documents Come to Life

In the modern enterprise, documents are the lifeblood of every decision, contract, and strategy. Yet, most Document Management Systems (DMS) treat your data like a digital graveyard—difficult to search, tedious to organize, and static.

Contuitive DMS is a next-generation, AI-first platform designed to transform your documents from passive files into an active, automated workforce. We've eliminated the friction of traditional software, replacing complex configurations with intuitive, "magic-like" functionality.

Here is why offices and homes are choosing Contuitive DMS to scale smarter and grow faster.

1. Radical Simplicity: Productive from Day One

Traditional systems demand weeks of "setup" before you can upload a single file. Contuitive DMS is built for immediate impact.

- **The "Zero-Effort" Onboarding:** Our philosophy is simple—you shouldn't need a manual to manage your documents. Skip the configuration and start uploading instantly.
- **Flattened Bulk Migration:** Moving legacy data is usually a nightmare. With our **Flatten Zip** feature, you can drop a massive archive into the system, and our AI will automatically unzip, extract, and tag every file for you. Chaos becomes order in minutes.

2. Intelligent Discovery: Find What You Actually Mean

Standard search engines look for words; our AI looks for **intent**.

- **Natural Language Search:** Stop playing "keyword roulette." Search for *"Home Sale Deed"* and find your *"House Sale Agreement"* instantly. Our system understands the context of your query, even if the exact words don't match.
- **Memory-Enhanced Recall:** Add personal notes like *"Receipt from the 2024 Tech Summit"* to media files. You aren't just searching data; you're searching your memory.

3. Power Tags: Your Digital Workforce

In Contuitive, a tag is no longer just a label—it's a trigger for action. **Power Tags** allow you to automate complex office workflows with a single click.

- **Living Automations:** Apply a tag to instantly share a document with a specific team, extract its data, and schedule its archival for two years later.
- **AI Data Extraction:** Turn unstructured photos and PDFs into searchable, structured data. Automatically extract names, dates, and currency amounts from receipts or IDs without lifting a finger.

4. The "Bring Your Own Editor" Templating Engine

Why learn a new design tool when you've already mastered the world's best?

- **Word & Google Docs Native:** Design your professional templates in your favorite word processor. Use the simple `{{PLACEHOLDER}}` syntax, and our engine will honor your fonts, margins, and branding perfectly.
- **Automated Bulk Generation:** Generate one personalized letter or ten thousand invoices via CSV. Whether it's a one-off contract or a massive monthly batch, every document is a pixel-perfect representation of your brand.

5. Multimedia Intelligence: Your Life in High Definition

Where traditional DMS systems often ignore the personal importance of photos and videos, Contuitive DMS provides a dedicated **"Photos" App** feature to satisfy your need for a high-end media gallery.

- **Standard Timeline View:** Browse your personal and family albums in an intuitive timeline view just like premium online photo apps.
- **DMS-Grade Media Management:** Unlike standard photo apps, we bring professional DMS power to your gallery by allowing you to create **revisions** of photos and add **ratings, tags, and notes** (e.g., "My Baby's first walk") to find the perfect shot instantly.
- **AI-Powered Visual Search:** Contuitive DMS analyzes your imagery using AI, inheriting natural language search for visual content.
- **EXIF & Metadata Intelligence:** The system extracts all **EXIF metadata** and presents it in a clean interface. If a photo lacks metadata, the system intelligently determines the "Date Taken" from the filename timestamp—a unique feature helpful for photos received via messaging apps.
- **Media Sovereignty:** Photos and videos occupy massive space; Contuitive DMS provides modern app features with the peace of mind that your large collection is hosted on your own infrastructure rather than expensive cloud services.

6. Absolute Data Sovereignty: Your Data, Your Perimeter

In an era where data breaches are "when," not "if," and cloud providers hold your business-critical information hostage behind subscriptions and third-party terms, Contuitive DMS offers the ultimate corporate luxury: Absolute Sovereignty.

We don't just store your documents; we give you the keys to the fortress.

- **On-Premise Docker Deployment:** Host Contuitive DMS on your own infrastructure or a Synology NAS. Your data stays within your walls, ensuring 100% privacy, data sovereignty, and zero external intervention.
- **Audit-Ready Accountability:** Every action is tracked in an immutable, real-time activity feed. From version history to user access, you have a complete audit trail for total peace of mind.

Experience the Future of Document Management

Most systems merely store your files. **Contuitive DMS activates them.** By combining the familiarity of your daily tools with the "superpowers" of modern AI, we ensure that every document leaving your desk is accurate, professional, and perfectly timed.

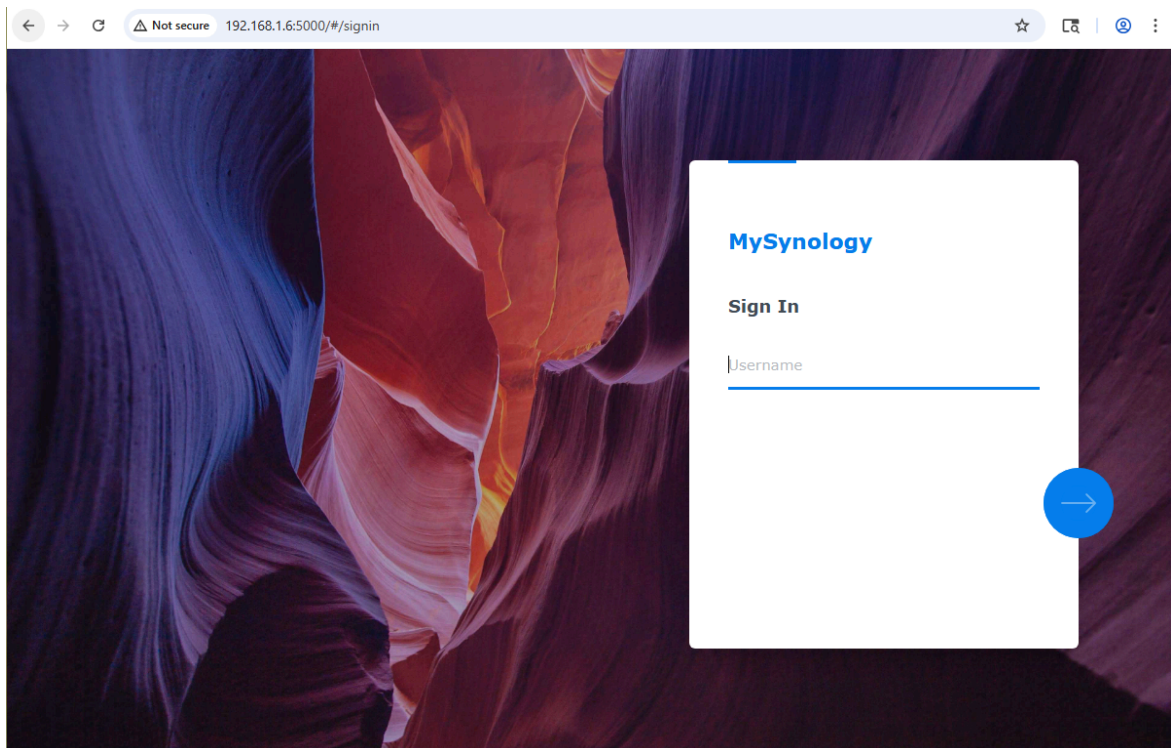
Installation

1. Installing Container Manager (Docker)

Contuitive DMS runs as a Docker container on your Synology NAS. If you already have **Container Manager** (or **Docker** on older DSM versions) installed, you may skip this section.

Log In to Synology DSM

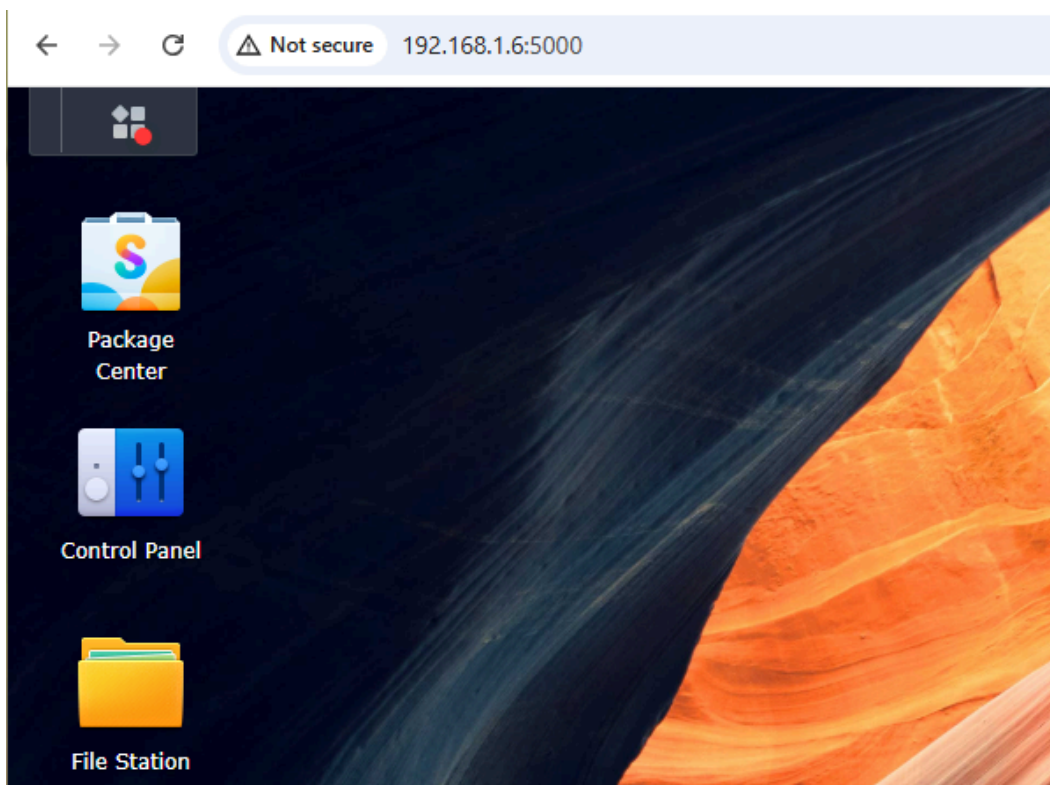
1. Open your web browser and enter the **IP address** or **QuickConnect ID** of your Synology NAS (e.g., <http://192.168.1.6:5000>).



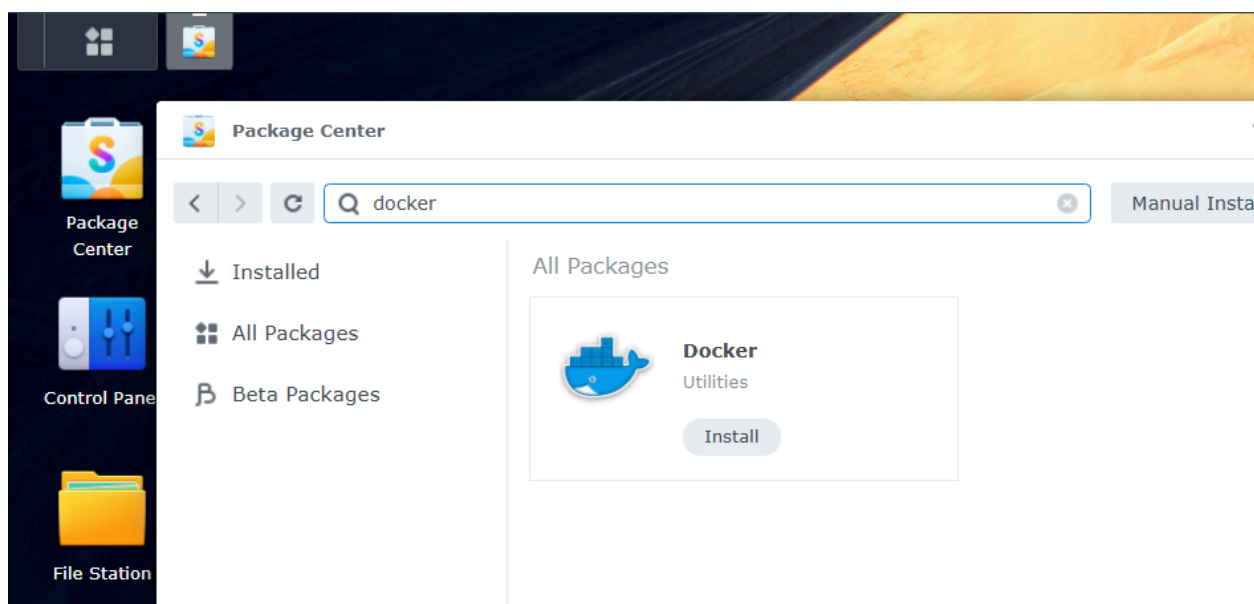
2. Enter your credentials to log in to the DSM desktop.

Install the Container Manager (Docker)

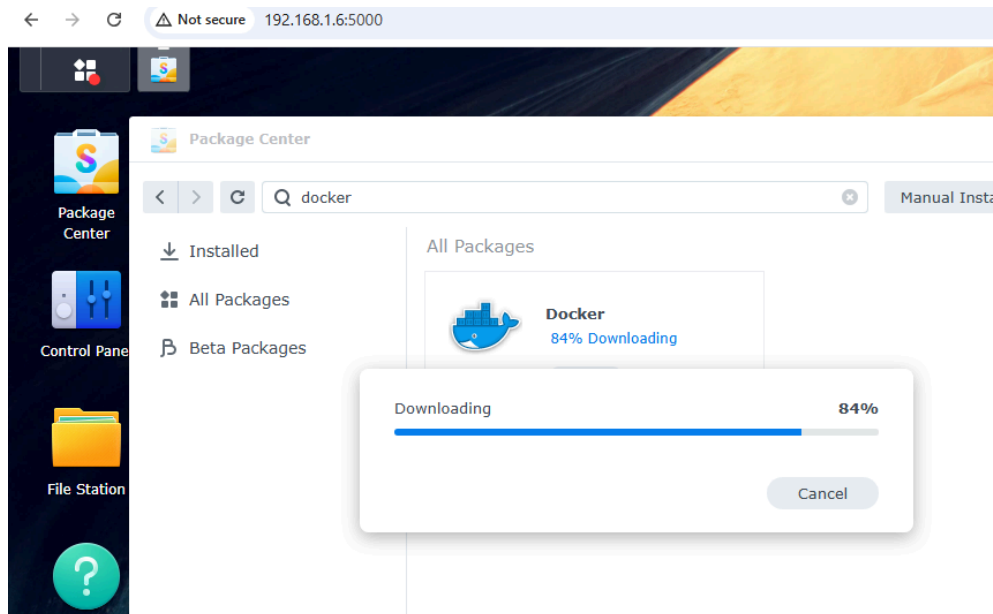
1. Open the **Package Center** from the DSM desktop or main menu:



2. Use the search bar to type "**Container Manager**" (or "Docker").



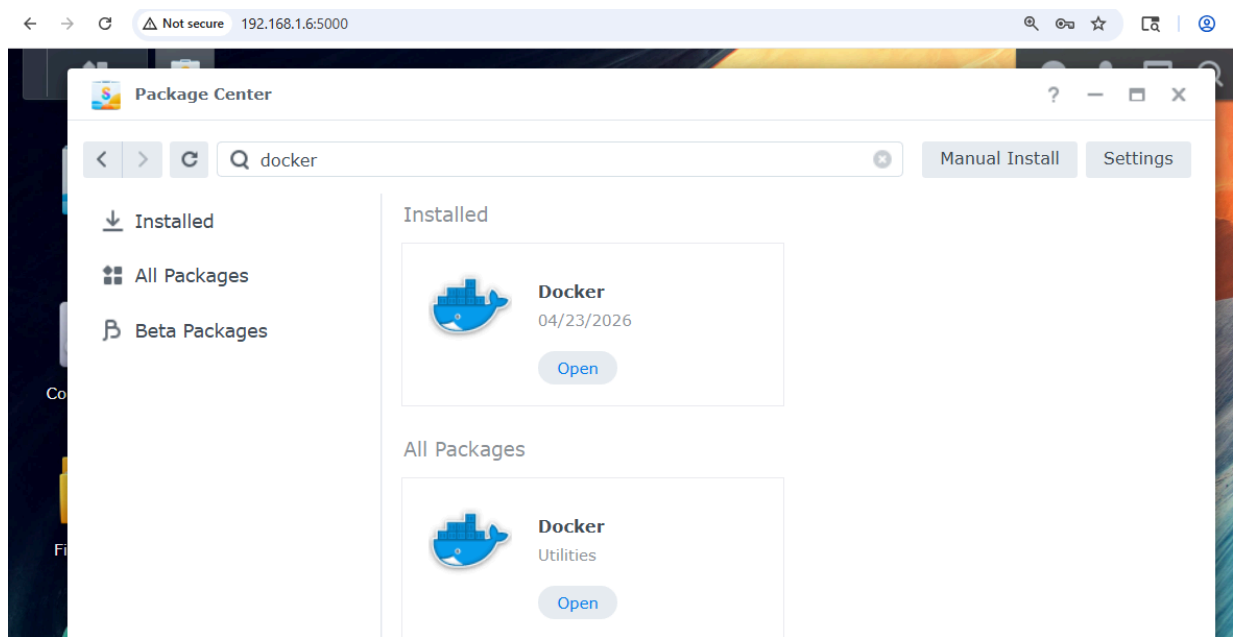
3. Click **Install**.

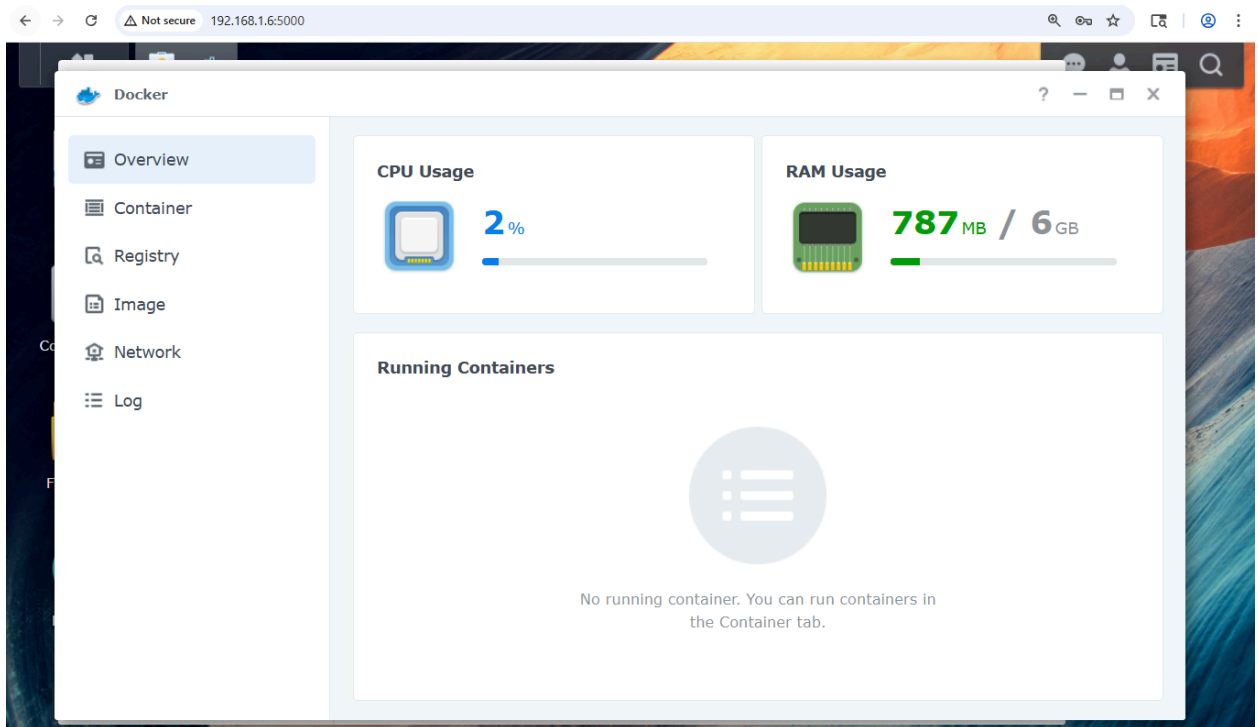


- Once the confirmation dialog appears, click **Done**. The installation may take a moment to complete.

Launch the Container Manager (Docker)

- After installation, click **Open** from the Package Center, or locate the **Container Manager (Docker)** icon in your DSM main menu.

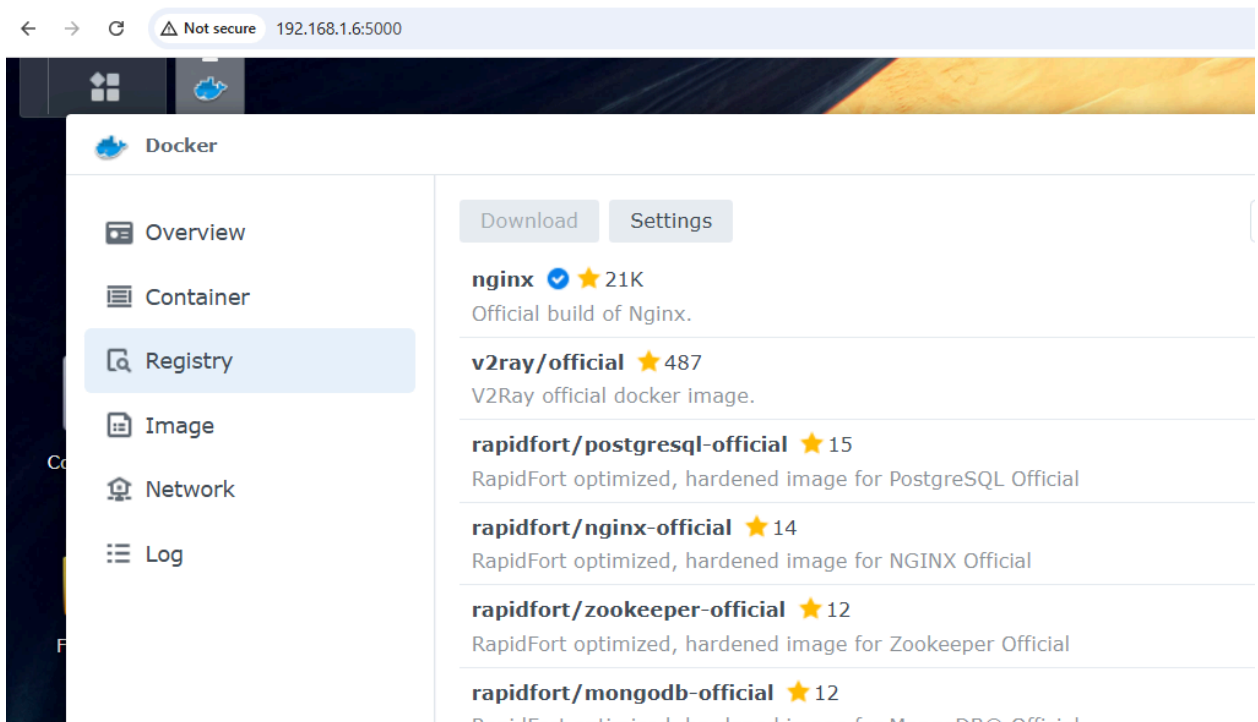




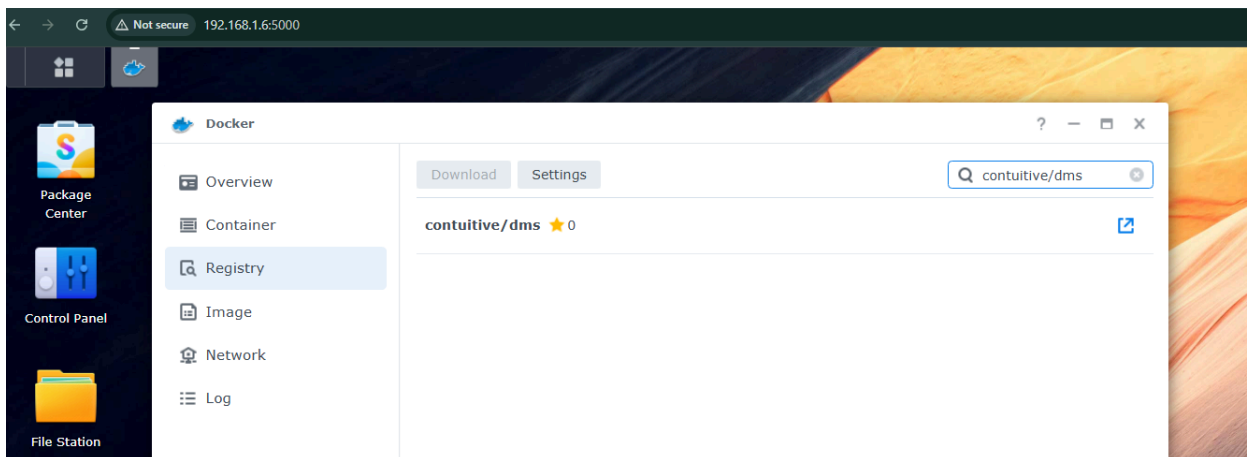
2. Pulling the Contuitive DMS Image

Once Container Manager is running, you need to download the official Contuitive DMS image.

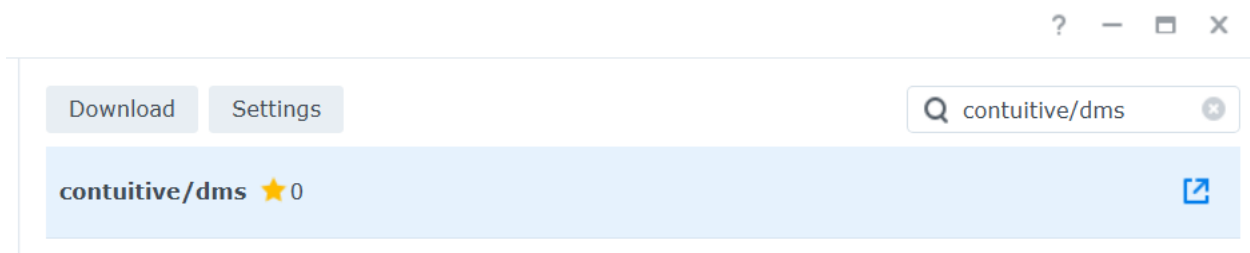
1. **Navigate to Registry:** Click **Registry** in the left-hand panel of Container Manager.



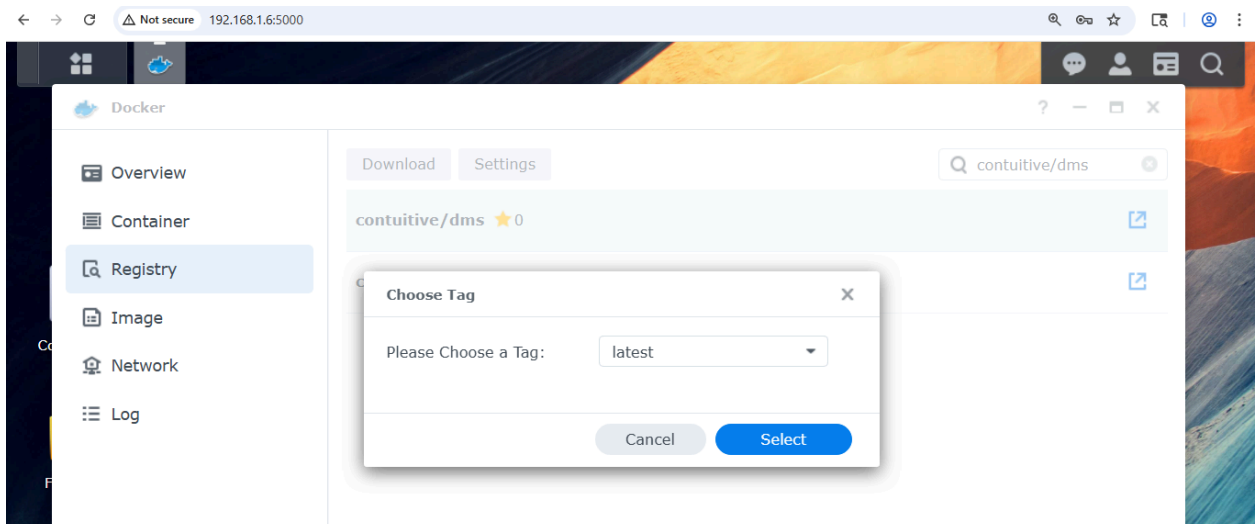
2. **Search:** In the top-right search bar, type `contuitive/dms` and press Enter.



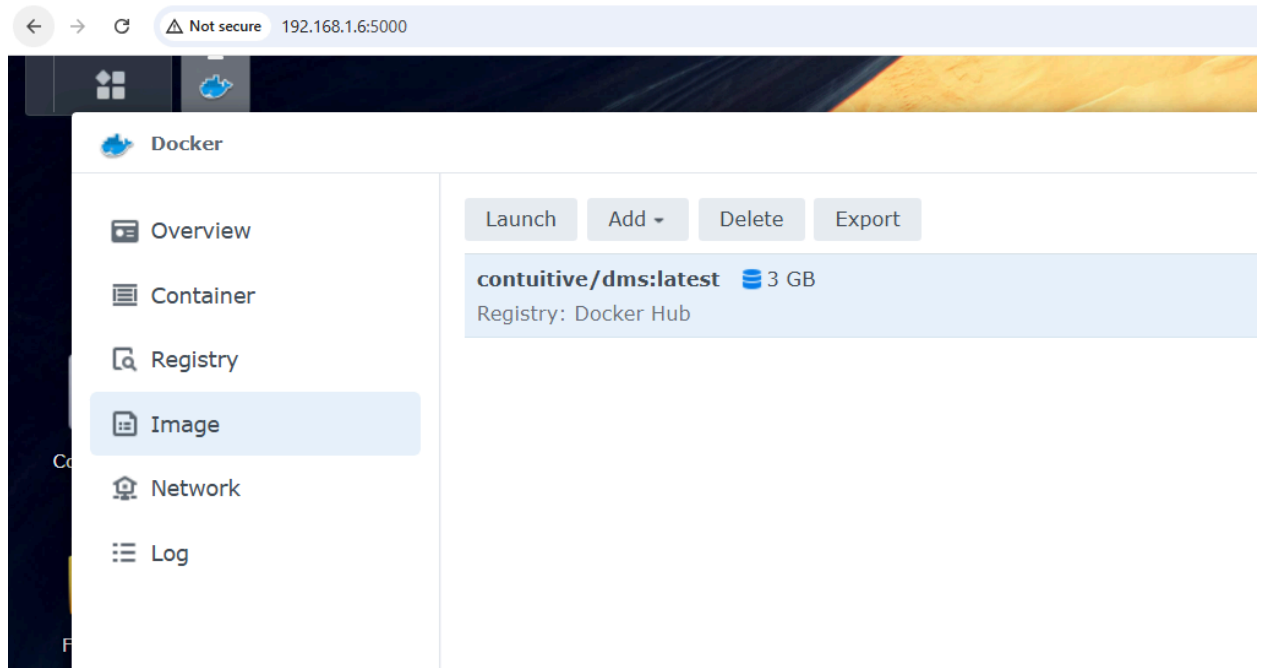
3. **Download:** Select the `contuitive/dms` image from the results and click **Download**.



4. In the **Choose Tag** pop-up, select **latest** for the most stable version and click **Select**.



5. **Monitor Progress:** You can track the download in the **Image** tab. Proceed once the download is complete.

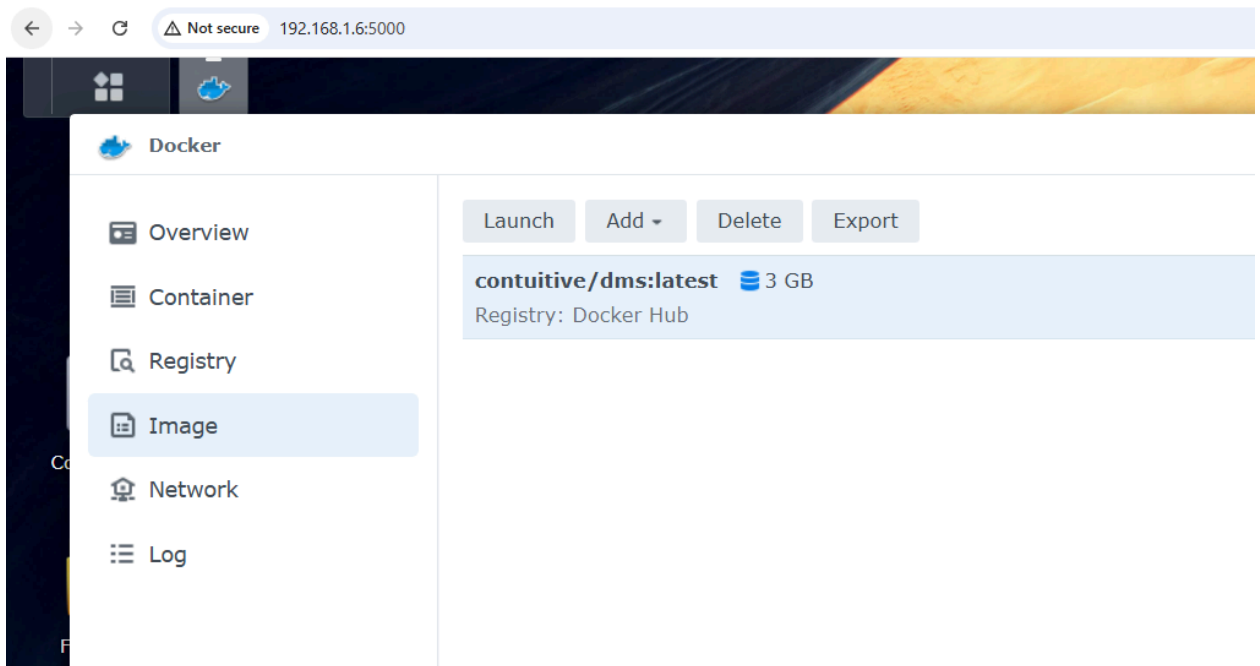


3. Creating and Configuring the Container

This step configures how the DMS interacts with your NAS hardware and stores data.

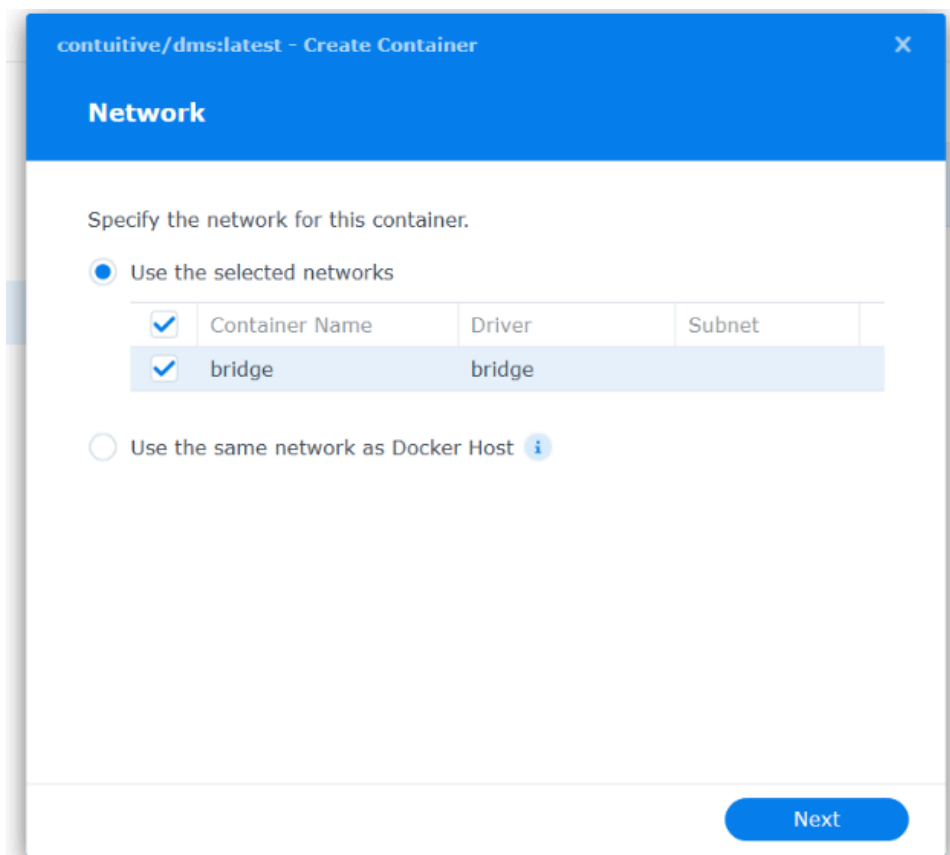
Start the Wizard

1. Go to the **Image** tab, select the `contuitive/dms` image, and click **Launch**.



Network Settings

Network: Keep the default (typically **bridge**) and click **Next**.



General Settings

The screenshot shows a 'Create Container' window for the image 'contuitive/dms:latest'. The 'General Settings' tab is active. The 'Container Name' is set to 'contuitive-dms-instance'. There are checkboxes for 'Execute container using high privilege' (unchecked), 'Enable resource limitation' (unchecked), and 'Enable auto-restart' (checked). Under 'Enable resource limitation', there are dropdowns for 'CPU Priority' (set to 'Low') and a slider for 'Memory Limit' (set to 6144 MB). There is also an 'Add Port' button. At the bottom, there are 'Back' and 'Next' buttons.

contuitive/dms:latest - Create Container

General Settings

Container Name *: contuitive-dms-instance

☐ Execute container using high privilege

Configure capabilities ⓘ

☐ Enable resource limitation

CPU Priority: Low

Memory Limit: 6144 MB

☒ Enable auto-restart ⓘ

☐ Enable web portal via Web Station ⓘ

Port: 3000 HTTPS

Add Port

Advanced Settings

Back Next

- **Container Name:** Enter a name like `contuitive-dms-instance`.
- **Enable auto-restart:** Enable this so the DMS starts automatically if your NAS reboots.
- Click **Next**.

Port Settings

contuitive/dms:latest - Create Container

Port Settings

Enter available DSM ports in the Local Port field to map the ports with container ports. The ports listed here are the container's exposed ports.

Add

Delete

Local Port	Container Port	Type	
3000	3000	TCP	

Back

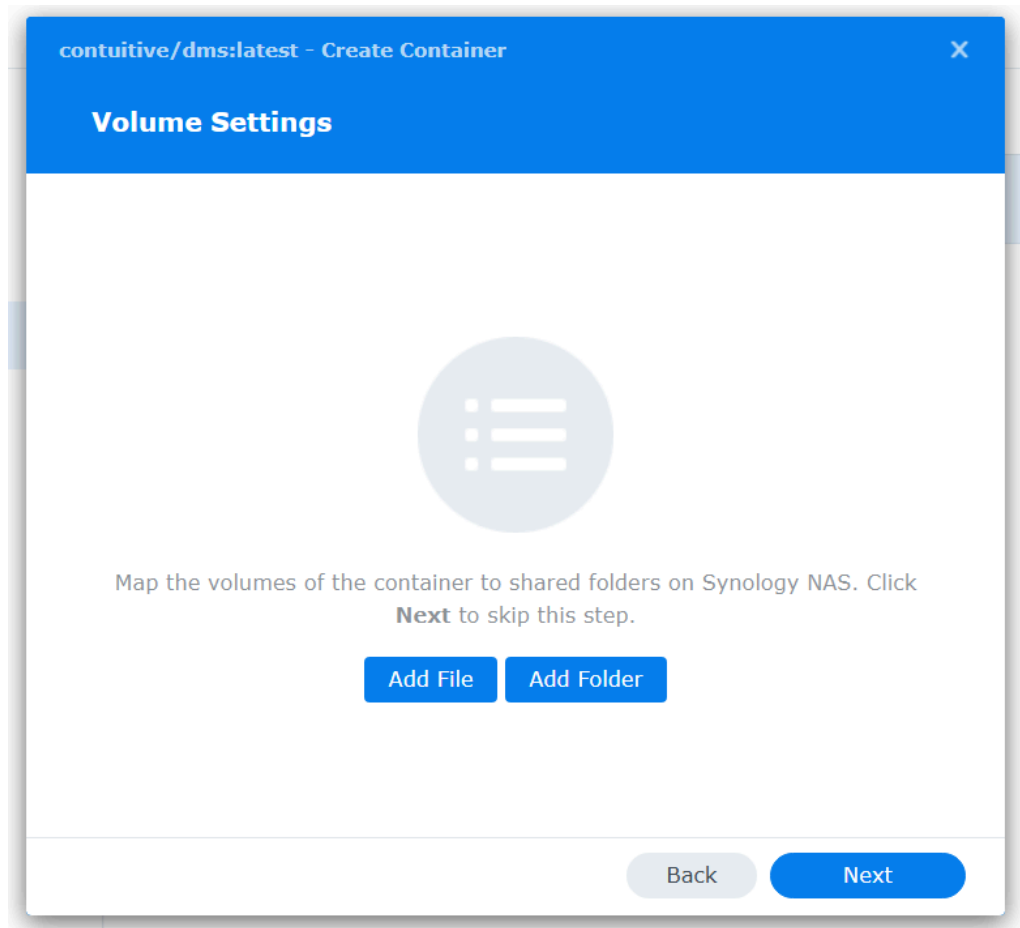
Next

1. Map a **Local Port** to the **Container Port 3000**.
 - *Example:* Set Local Port to 3000.
 - **Note:** If port 3000 is already in use by another app, choose an alternative like 3001. You will access the DMS via `your-nas-ip:local-port`.
2. Click **Next**.

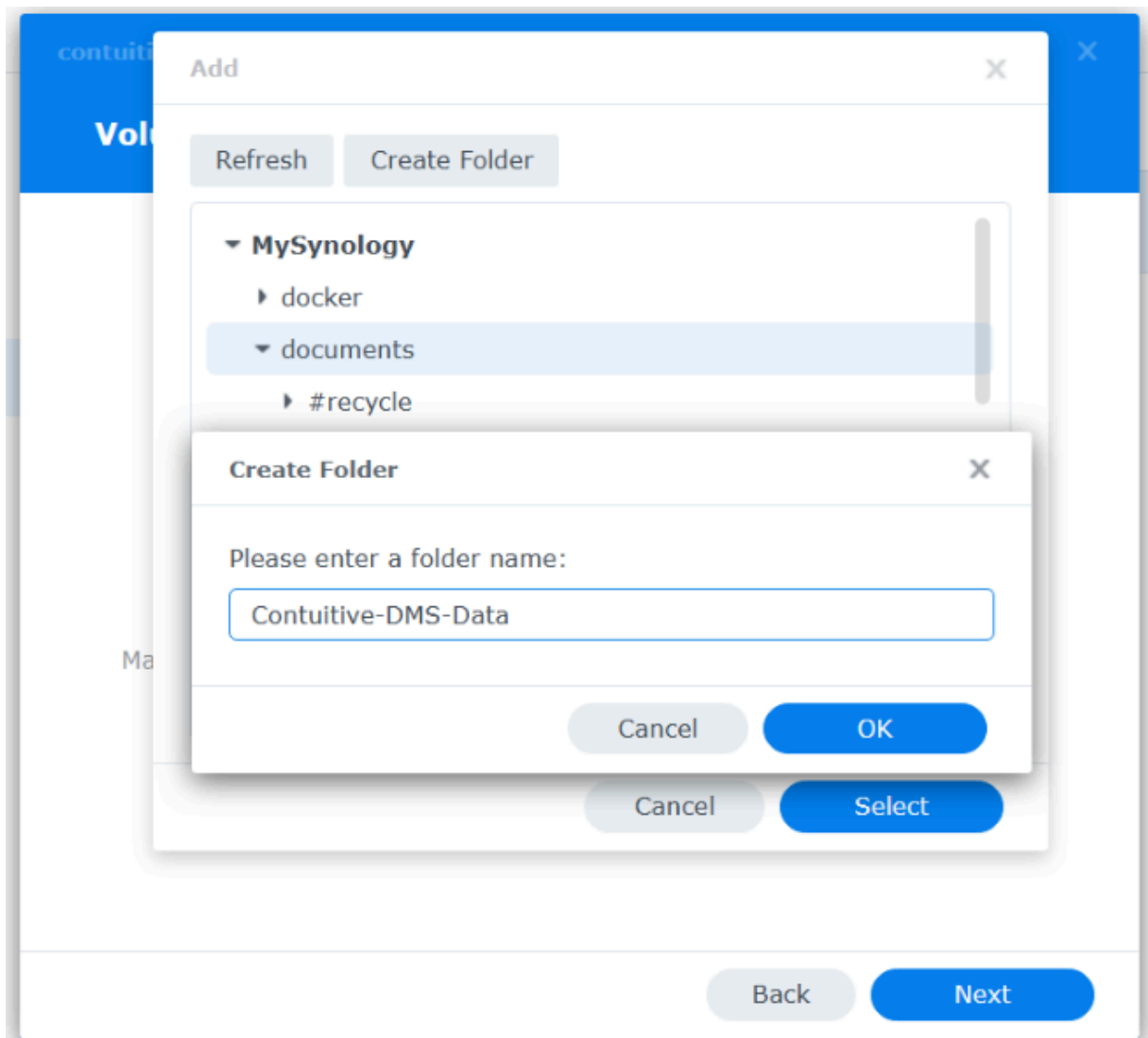
Volume Settings (Data Persistence)

To ensure your documents and configurations are saved permanently on your NAS:

1. Click **Add Folder**.



2. Create a new folder (e.g., `/docker/Contuitive-DMS-Data`) to keep your data organized. You may choose any name of your choice. Select this folder.



3. In the **Mount path** field, enter exactly: `/data`.

contuitive/dms:latest - Create Container

Volume Settings

Map the volumes of the container to shared folders on Synology NAS.

Add File Add Folder Delete

File/Folder	Mount path	☐ Read-Only	
/documents/Contuitiv...	/data	☐	

Back Next

4. Click **Next**.

Finalize

1. Review the summary. Ensure **"Run this container after the wizard is finished"** is checked.

contuitive/dms:latest - Create Container

Summary

Item	Value							
Container Name	contuitive-dms-instance							
Enable auto-restart	Yes							
Port Settings	<table> <tr> <th>Local Port</th><th>Container Port</th><th>Type</th></tr> <tr> <td>3000</td><td>3000</td><td>TCP</td></tr> </table>	Local Port	Container Port	Type	3000	3000	TCP	
Local Port	Container Port	Type						
3000	3000	TCP						
Volume	<table> <tr> <th>File/Folder</th><th>Mount path</th><th>Read-Only</th></tr> <tr> <td>/documents/C... DMS-Data</td><td>/data</td><td>No</td></tr> </table>	File/Folder	Mount path	Read-Only	/documents/C... DMS-Data	/data	No	
File/Folder	Mount path	Read-Only						
/documents/C... DMS-Data	/data	No						
Network	bridge							
Environment Variables	<table> <tr> <th>Variable</th><th>Value</th></tr> <tr> <td>PATH</td><td>/usr/local/sbin:/usr/loc...</td></tr> <tr> <td>ADD_LTD</td><td>1654</td></tr> </table>	Variable	Value	PATH	/usr/local/sbin:/usr/loc...	ADD_LTD	1654	
Variable	Value							
PATH	/usr/local/sbin:/usr/loc...							
ADD_LTD	1654							

9 items

☒ Run this container after the wizard is finished

Back
Done

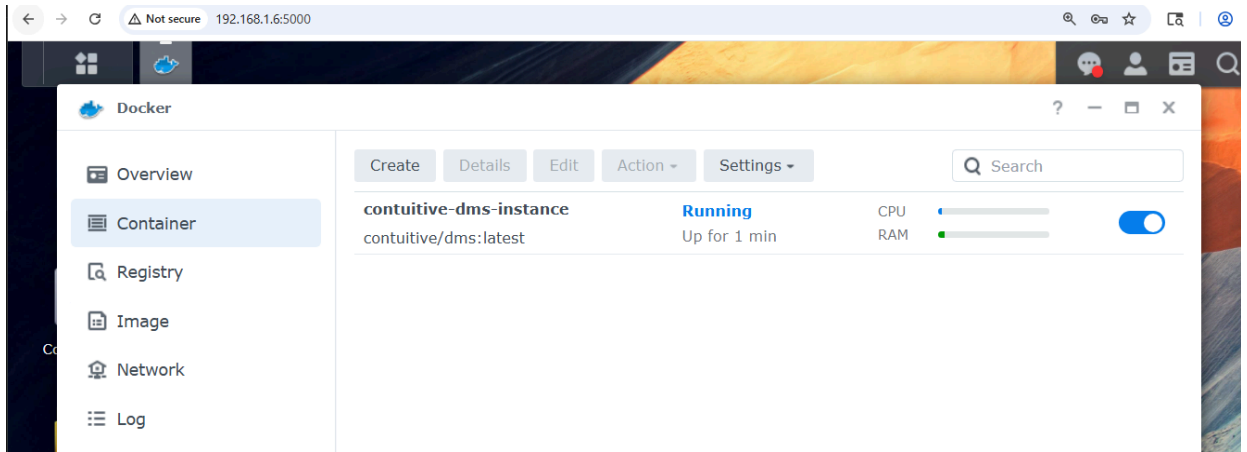
- Click **Done**.

4. Initial Access and Setup

Verify Status

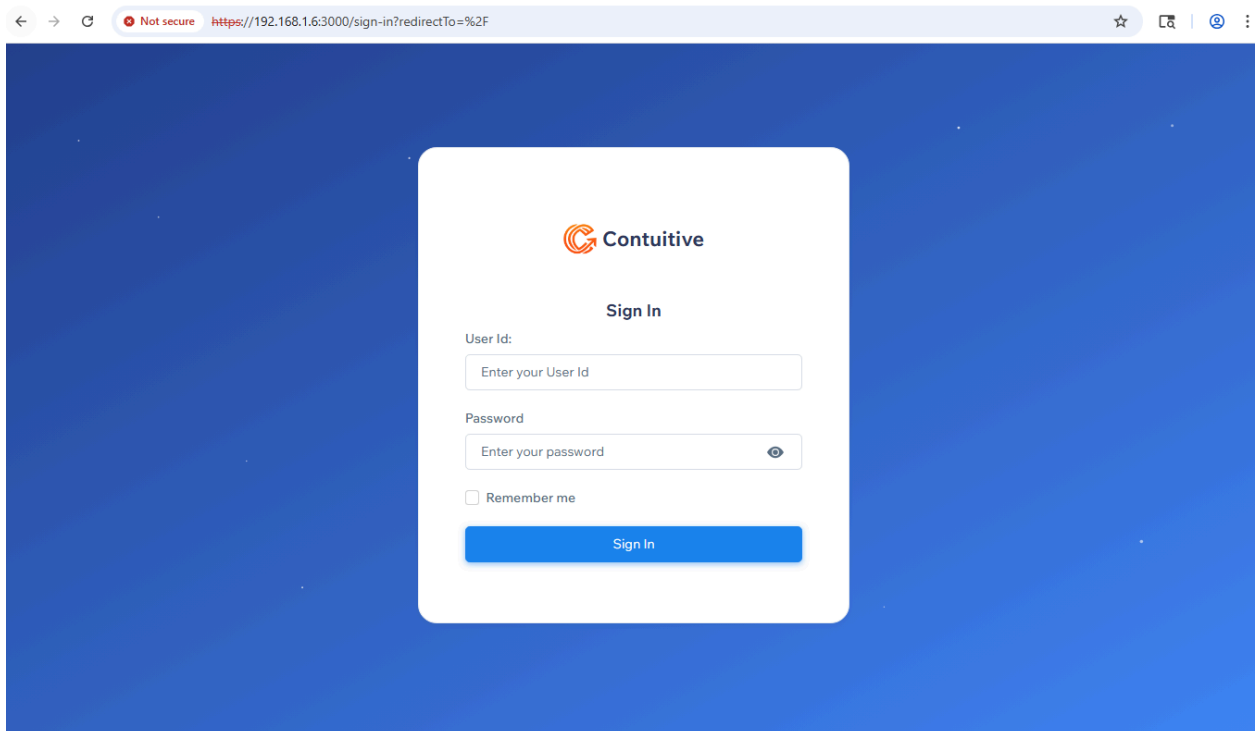
- Navigate to the **Container** tab in Container Manager.

2. Ensure your `contuitive-dms` container shows a green **Running** status.



Access the Web Interface

1. Open a new browser tab and go to: `http://[YOUR-NAS-IP]:3000` (adjust the port if you customized it).



2. The Contuitive Sign-In screen should appear.

Security and Activation

1. **Initial Login:** Use the default credentials:
 - **Username:** `admin`

- **Password:** admin

2. **Update Credentials:** You will be prompted to create a new, secure **Admin ID** and **Password**. Update these and log back in with your new credentials.

Contuitive

Reset Default Credentials

Secure your IMS with a non-predictable Admin ID and a strong password.

Admin Id:

New Password

Confirm Password

[Cancel](#) [Update](#)

3. **License Activation:** Select **Activate Trial** or enter your purchased **License Key**.

Contuitive

Dashboard

EXPLORE

- Documents
- Photos
- Power Tags
- Placeholders
- Archived
- Trash

ADMIN

- Users
- Settings
- License

newadminid Online

My Subscription & Licensing

Go to Dashboard

License Type: Not Active

No active license detected. To continue using the application, please purchase a license or activate trial.

[Activate Trial](#)

License Management

Activate or Purchase a License

- Enjoy unrestricted access to all features
- Receive future updates and new features

[Activate License](#) [Purchase License](#)

© 2026 Contuitive Software

Setup Complete! You can now click **Dashboard** in the left pane to begin managing your documents.

License Management

Upon the initial installation of **Contuitive DMS**, you must activate a license to access the application. The system provides options for a 15-day trial, a full perpetual license, and optional feature add-ons.

Trial License

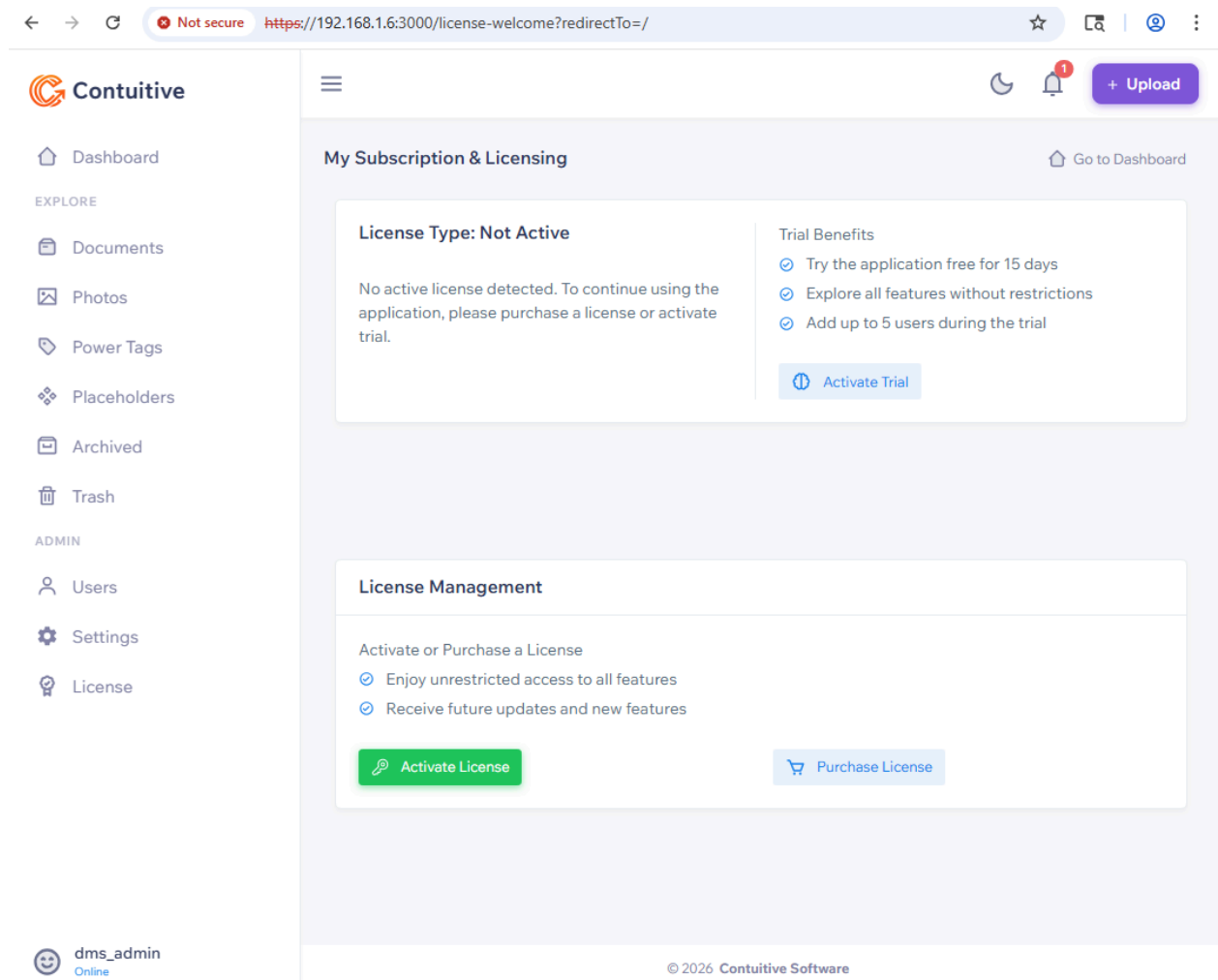
The trial version allows you to explore the full capabilities of Contuitive DMS without functional restrictions for a limited time.

Trial Benefits:

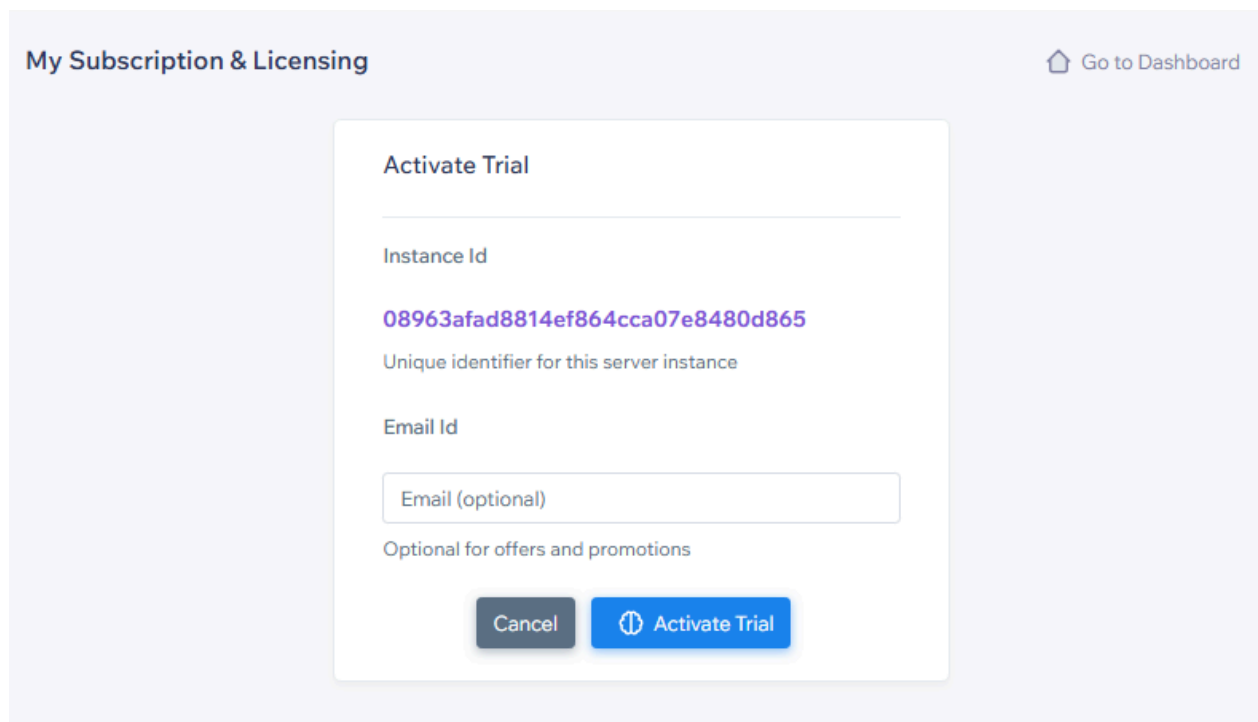
- **Duration:** 15 days of unrestricted access.
- **Support:** Option to provide an **Email ID** during activation to receive quick support, offers, and promotions.

Steps to Activate Trial:

1. Navigate to the **License** section in the Admin sidebar.

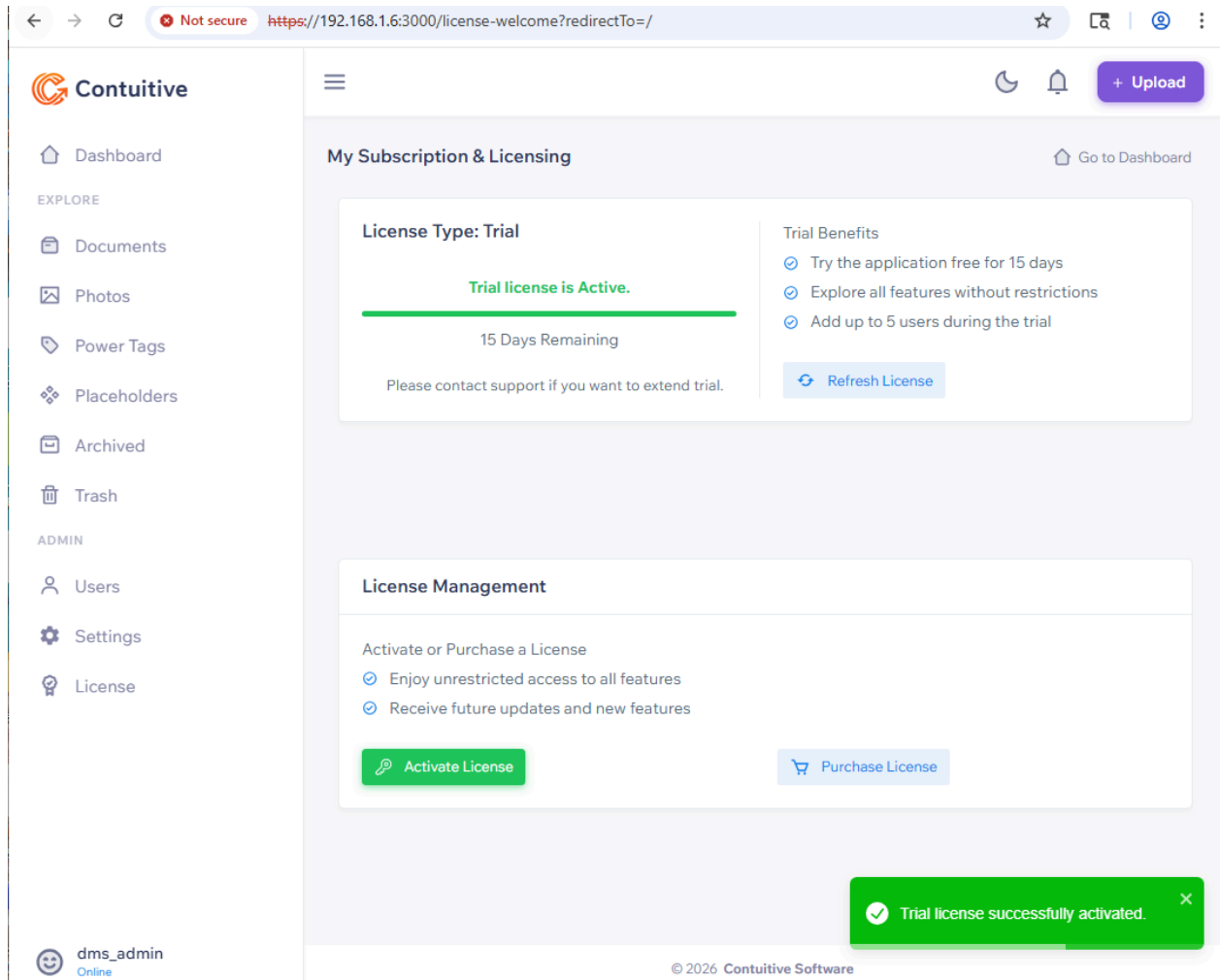


2. Click the **Activate Trial** button.



3. In the dialog, enter an optional **Email ID** if desired.
4. Click **Activate Trial** and wait for the process to complete.

5. Once active, the dashboard will display **"Trial license is Active"** along with the remaining days.



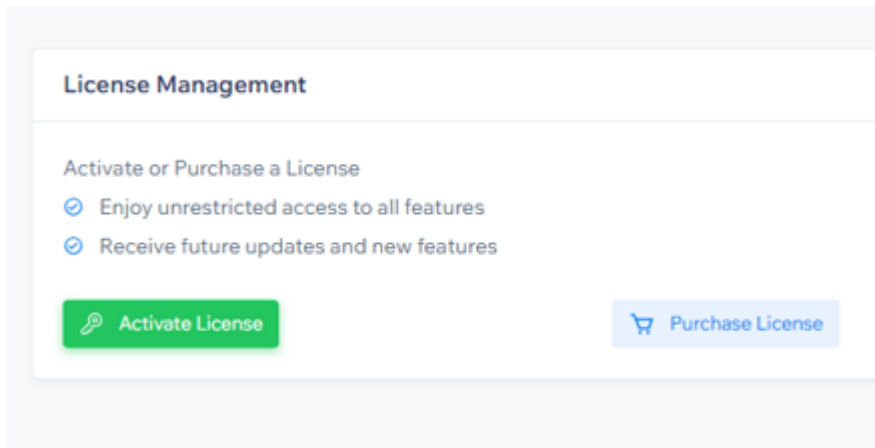
Full License Activation

To ensure perpetual access and receive future updates, you must purchase and activate a full license.

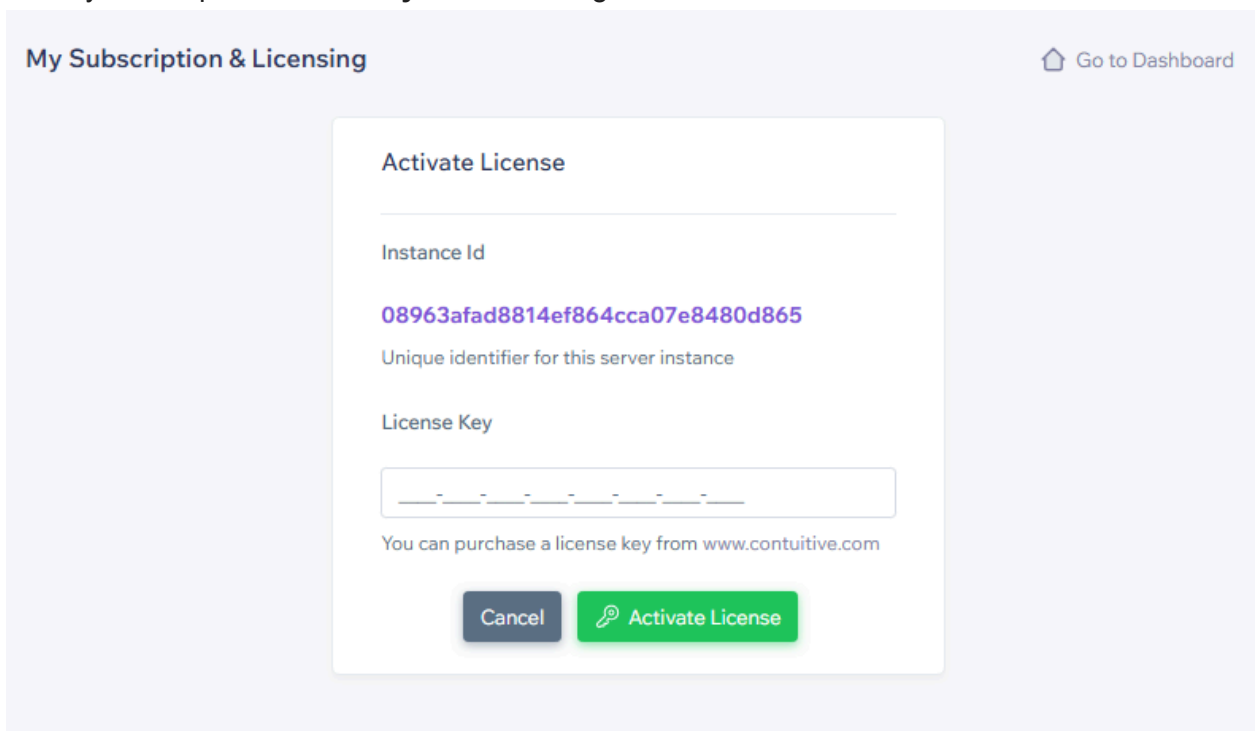
Activation Steps:

1. Visit www.contuitive.com to purchase your license key.

2. In the Contuitive DMS interface, click the **Activate License** button in “License Management” Card.

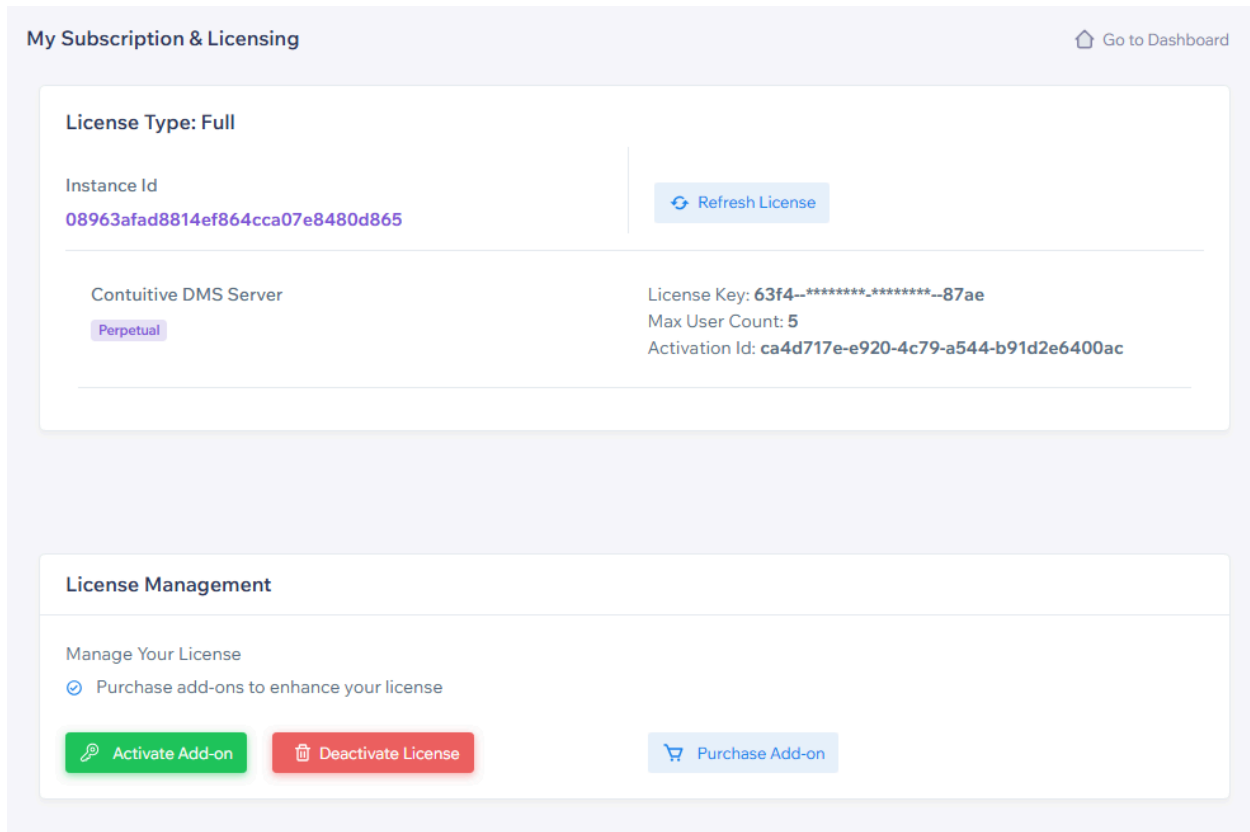


3. Paste your unique **License Key** into the dialog box.



4. Click **Activate License**.

After activation, the **License Type** will update to **Full**. The dashboard will display critical details, as follows:



My Subscription & Licensing [Go to Dashboard](#)

License Type: Full

Instance Id
08963afad8814ef864cca07e8480d865 [Refresh License](#)

Contuitive DMS Server
Perpetual

License Key: **63f4--*****--87ae**
Max User Count: **5**
Activation Id: **ca4d717e-e920-4c79-a544-b91d2e6400ac**

License Management

Manage Your License

☒ Purchase add-ons to enhance your license

[Activate Add-on](#) [Deactivate License](#) [Purchase Add-on](#)

- **Status:** Perpetual (or as defined by your license).
- **Max User Count:** The maximum number of users allowed.
- **Activation ID:** A unique identifier for your specific activation.

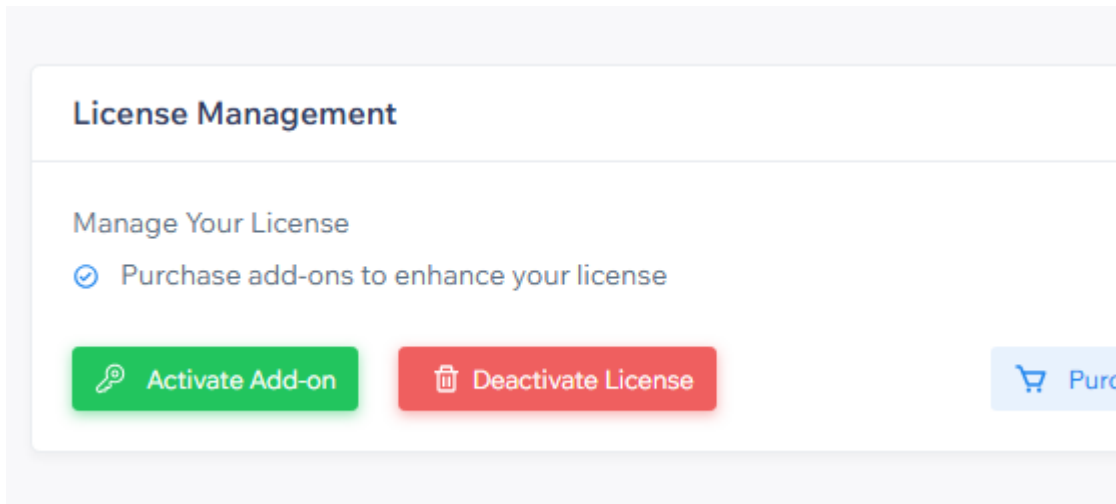
License Migration & Seats

Each license key is entitled to a specific number of instances (seats). Generally, a standard license allows for **one seat**.

How to Migrate your License:

If you need to move your Contuitive DMS installation to a new server or machine, you must first release the current seat:

1. Click the **Deactivate License** (red) button in the License Management card on the current server.



2. Confirm the deactivation in the prompt.
3. Once deactivated, the license key becomes available to be used again on a different machine.

Note: You cannot use the same license key on more than the allowed number of seats simultaneously.

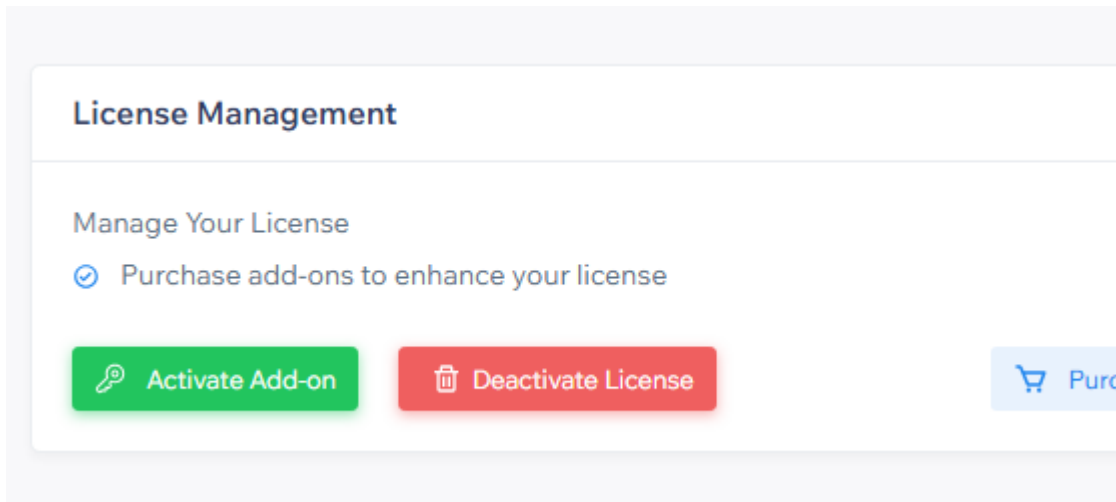
Enhancing Features with Add-ons

Contuitive offers **Add-ons** to expand the functionality of your base license. A common example is the **Users Add-on**, which increases the maximum number of users permitted on your instance.

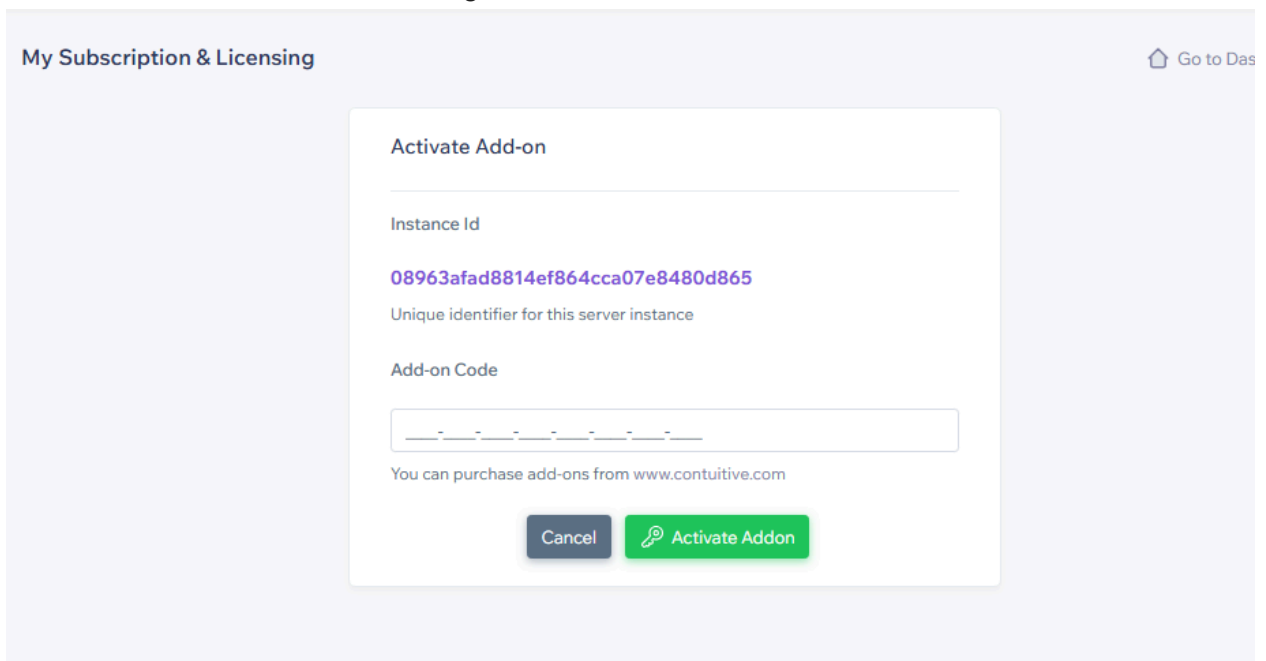
How to Activate an Add-on:

1. Purchase the desired add-on from the official website to receive an **Add-on Code**.

2. Click the **Activate Add-on** (Green) button into the License Management card on your License Management page.



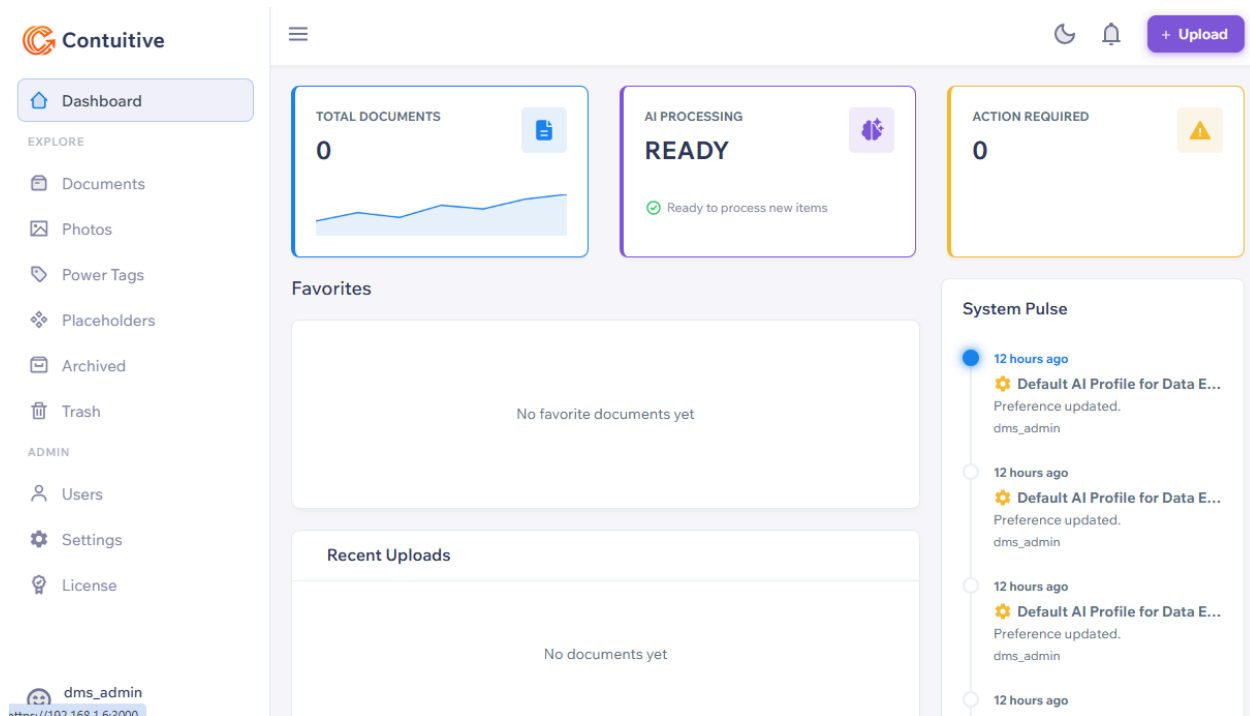
3. Enter the **Add-on Code** in the dialog.



4. Click **Activate Add-on** to apply the new features or increased limits immediately.

Dashboard

The **Dashboard** serves as the central hub of Contuitive DMS, providing a high-level overview of your documents, system health, and recent activity. It is designed to be intuitive, ensuring all critical information is available at a glance.



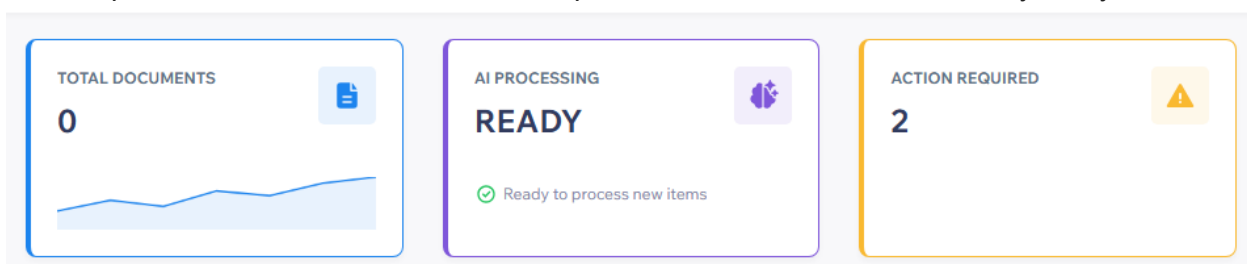
Navigation

The **Left Side Pane** is your primary navigation menu. Use this area to switch between different modules of the application, including:

- **Home/Dashboard**
- **Documents & Media**
- **Search**
- **Trash**
- **Admin Settings** (Users, Roles, Groups, and System Settings)

Key Statistics (Stat Cards)

At the top of the dashboard, real-time cards provide an immediate overview of your system's status:



- **Documents:** Displays the total count of documents currently managed under your user account.
- **AI Processing:** Shows the number of items currently queued for AI workflows, such as summarization or data extraction.
- **Action Required:** Highlights pending tasks or notifications that require your immediate attention to maintain workflow continuity.

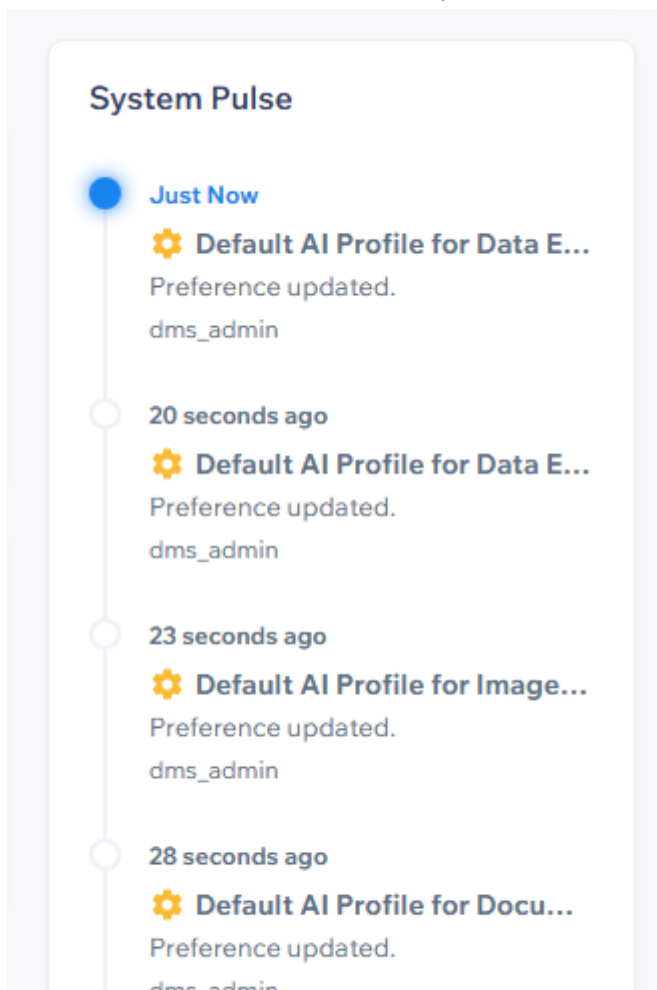
Content & Quick Access

The main body of the dashboard organizes your most relevant files for efficiency:

- **Favourites:** This section automatically pulls in documents and photos you have marked as "favourite," allowing for instant retrieval without searching.
- **Recent Uploads:** Provides a chronological list of the most recently added files, ensuring you can pick up exactly where you left off.

System Pulse

The **System Pulse** section acts as a live activity feed. It monitors and displays all user activities across the platform, providing transparency and a clear audit trail of recent changes, uploads, and administrative actions within the system.



Document Management

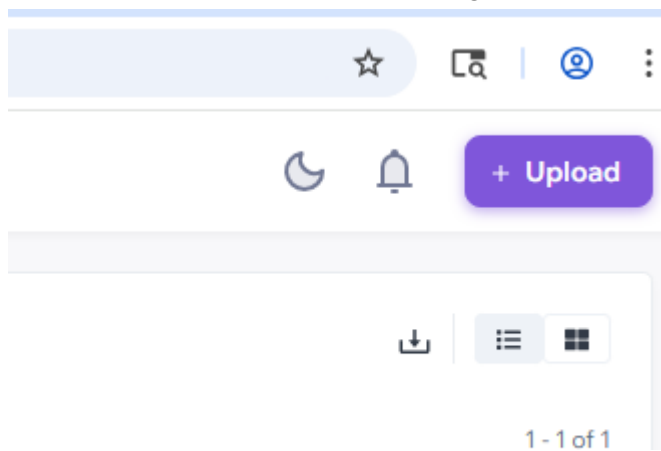
Contuitive DMS is a modern, AI-first Document Management System designed for immediate productivity with zero configuration overhead. Unlike traditional systems that require extensive setup before your first upload, Contuitive DMS empowers you to manage your data with a minimal learning curve and maximum flexibility.

Uploading Documents

Contuitive DMS supports individual and bulk uploads to streamline your data entry.

How to Upload:

1. Click the **Upload** button in the top right corner of the dashboard.



2. **Add Files:** Drag and drop documents into the “New File Upload” view or browse your system to select them.

← New File Upload

Drop files here or Click Me to add files.

Sale of House Agreement.pdf
11.18 KB

PDF
Word Book.pdf
4.16 MB

Sale Agreement,
Property Document.

☐ Generate an AI summary after upload

☐ Batch upload (all files must succeed)

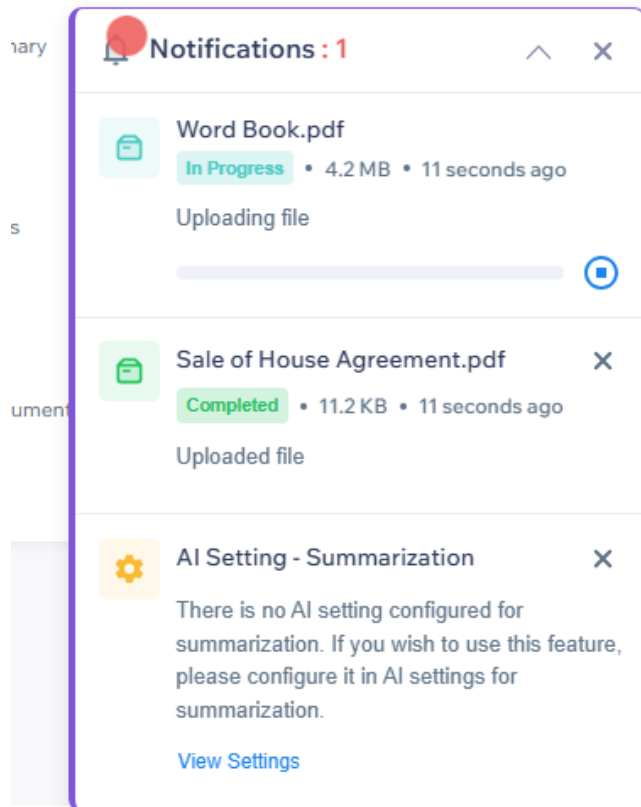
☐ Flatten (zip files are flattened and documents are created for each file inside)

Cancel Upload

Upload Options:

- **Notes:** Add a description or clue (e.g., "My first bike ride", "Property Document"). This is a powerful tool for media files (videos, music) where text cannot be extracted, and it significantly enhances AI-powered searching.
- **Generate AI Summary:** When checked, the system automatically creates a concise summary of the document content immediately after upload.
- **Batch Upload:** Use this for multiple files. Note that in this mode, the entire batch is discarded if a single file fails, ensuring data integrity.
- **Flatten Zip:** Designed for high-volume bulk uploads. Upload a single zip file; the system will automatically unzip (flatten) the contents and save them as individual documents.
 - **Auto-Tagging:** Every file extracted from the zip is automatically tagged with the zip file's name.
 - **Note:** Nested zips are not flattened to maintain clarity.

Once started, you can track or cancel progress in the **Notifications** popup. Previews, thumbnails, and search indexes are generated automatically in the background.

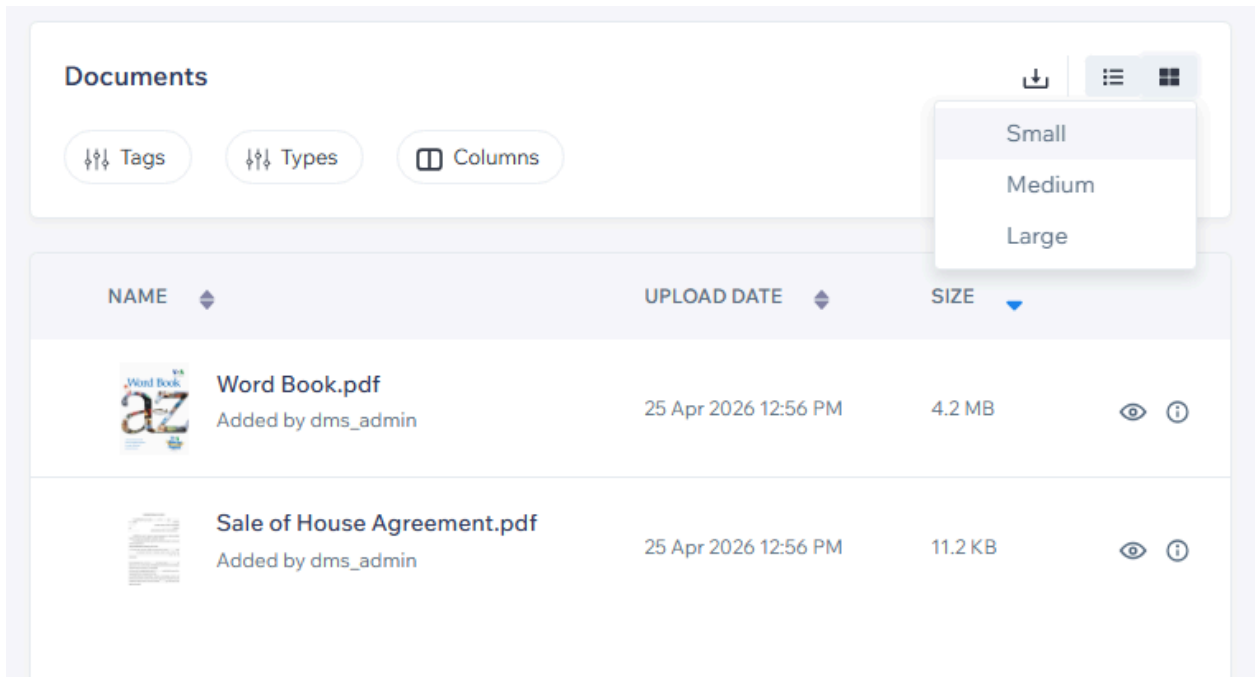


Browsing and Organizing

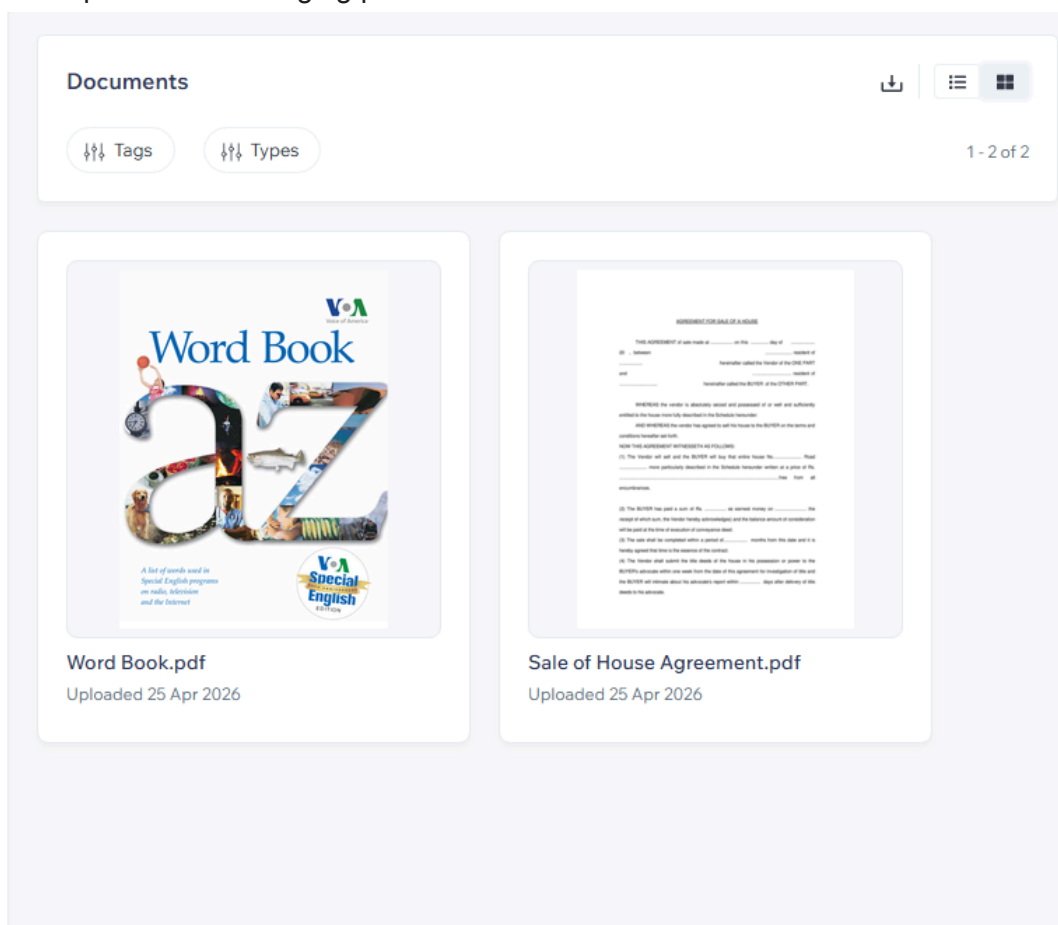
Access your library by clicking **Documents** in the left sidebar.

Display Modes:

- **List View:** A detailed grid where you can sort by columns. Use the **Columns** dropdown to customize which attributes are visible.

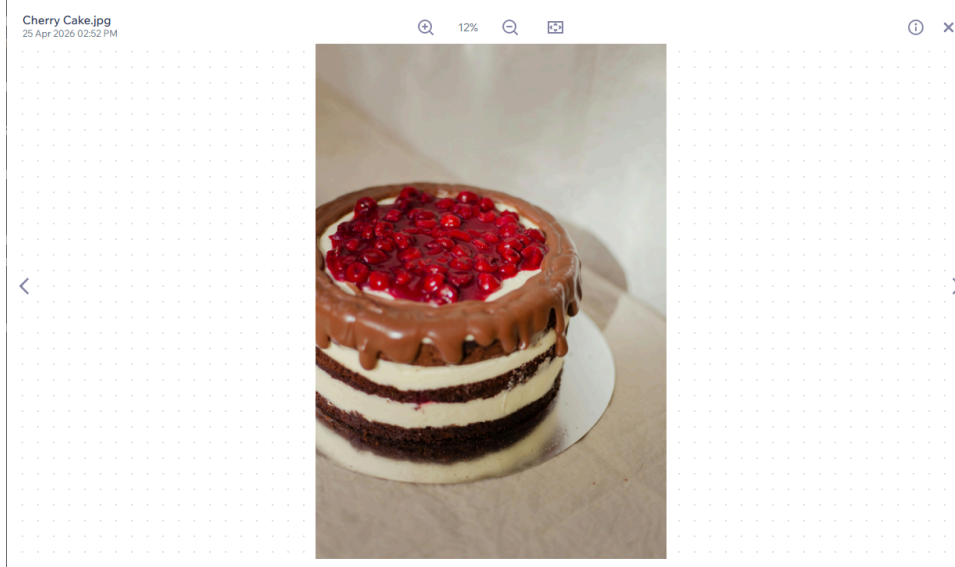


- **Tile View:** A visual gallery. Use the dropdown to switch between **Small, Medium, or Large** tiles—perfect for managing photo or book libraries.



Document Preview:

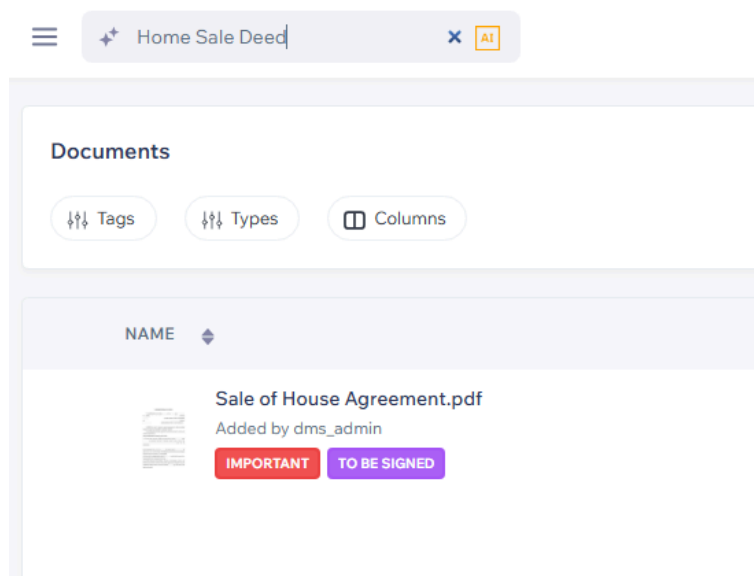
Click the **Preview** icon at the end of any document row to open a high-resolution viewer. You can navigate through your library using the **Next** and **Previous** arrows without leaving the preview mode.



AI-Powered Search

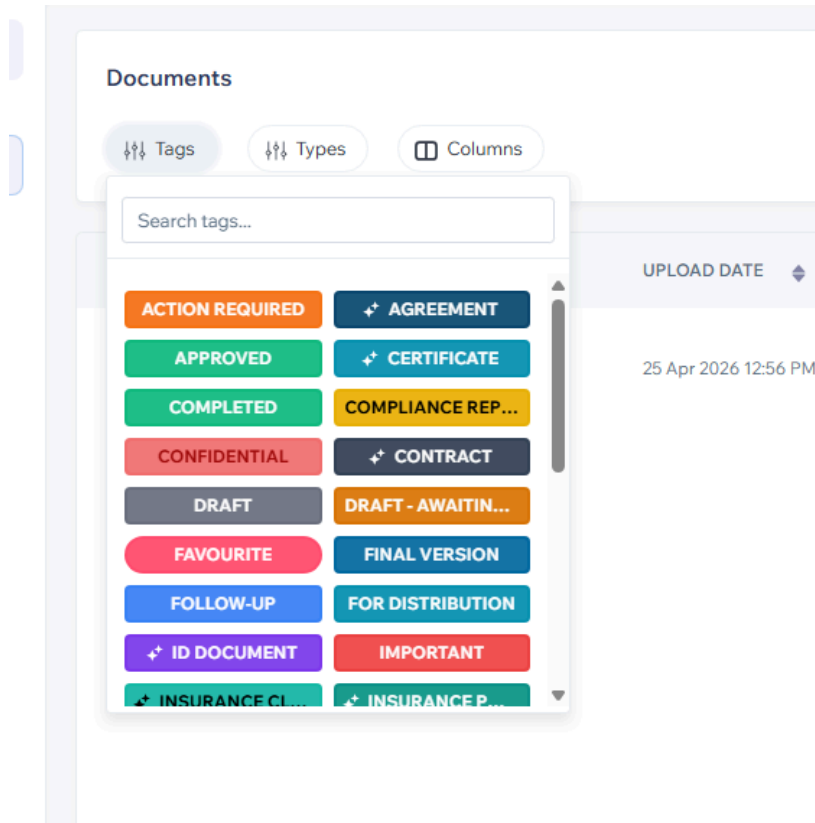
Contuitive DMS provides two distinct ways to find your information: Standard Text Search and AI powered search. Click on the [Ai] button in the search bar to toggle searching modes.

1. **Standard Text Search:** Performs a traditional full-text search based on the exact words found within the document or its metadata.
2. **AI Natural Language Search (Intent-Based):** Search using phrases or descriptions. For example, searching for *"Home Sale Deed"* will find a document titled *"House Sale Agreement"* because the AI understands the **intent** and context, even if the exact keywords don't match.

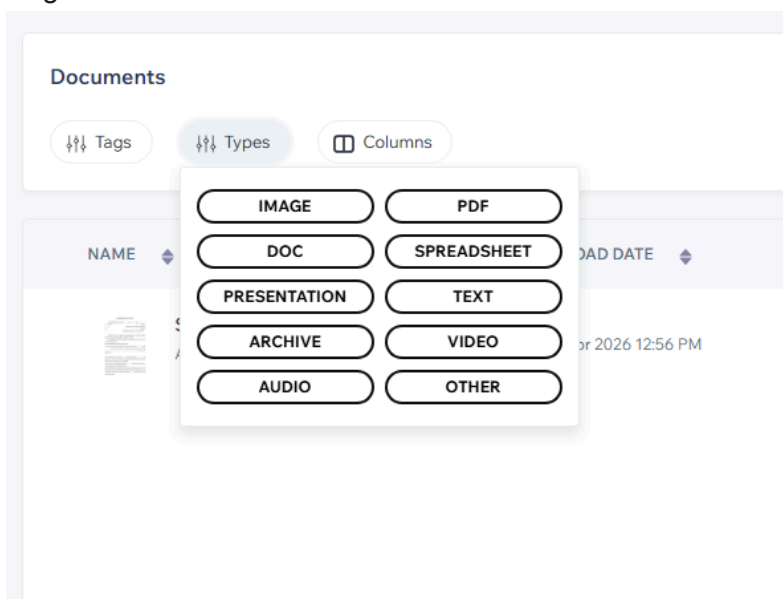


Refining Results:

- **Tag Search:** Select specific tags to filter your view to only relevant categories.



- **Type Filtering:** Use the **Types** dropdown to isolate specific formats, such as PDFs or Images



Document Details & Lifecycle

Clicking on any document opens a dedicated **Details Page**, where information is organized into four intuitive tabs.

←

🔒

Sale of House Agreement.pdf

Added by dms_admin • 25 Apr 2026 12:56 PM • v1.0

Download

⋮

🗑️

Info

AI

Version

Activities

RECENT ACTIVITIES

✓ Analyze Content
2 hours ago

✓ Generate Thumbnail
2 hours ago

ATTRIBUTES

Original Date
25 Apr 2026 12:56 PM

Size
11.18 KB

TAGS

RATING

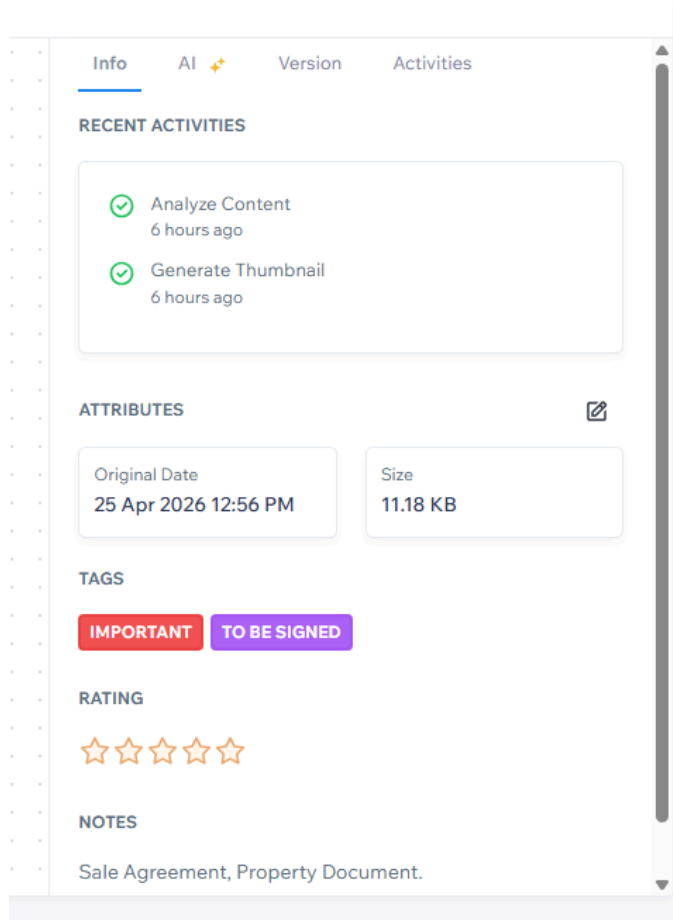
☆☆☆☆

NOTES

Sale Agreement, Property Document.

1. Info Tab

- **Attributes:** View file size, upload dates, and Exif data (for photos, such as ISO and Camera Model).



- **Editing:** Click the **Edit (pencil)** icon to update the document name, original date, tags, and notes.
- **Favorites:** Click the **Heart** icon next to the document name to add it to your dashboard favorites.

2. AI Tab

Info
AI
Version
Activities

RECENT ACTIVITIES

Analyze Content
1 hour ago

Summarize Document
2 hours ago

AI Suggestions

CONTRACT
+

AGREEMENT
+

LEASE AGREEMENT
+

BUYER
+

REPAYMENT
+

AI Summary

This agreement establishes the terms by which a Vendor will sell a house to a Buyer. The transaction requires the Buyer to pay an earnest money deposit, with the remaining balance due upon the execution of the conveyance deed. A critical step involves the Vendor submitting the property's title deeds to the Buyer's advocate for thorough investigation. Upon successful completion, the Vendor must hand over vacant possession and execute the necessary legal documents. The agreement outlines specific remedies for breach, including the forfeiture of the earnest money by the Vendor or the payment of damages by the Buyer.

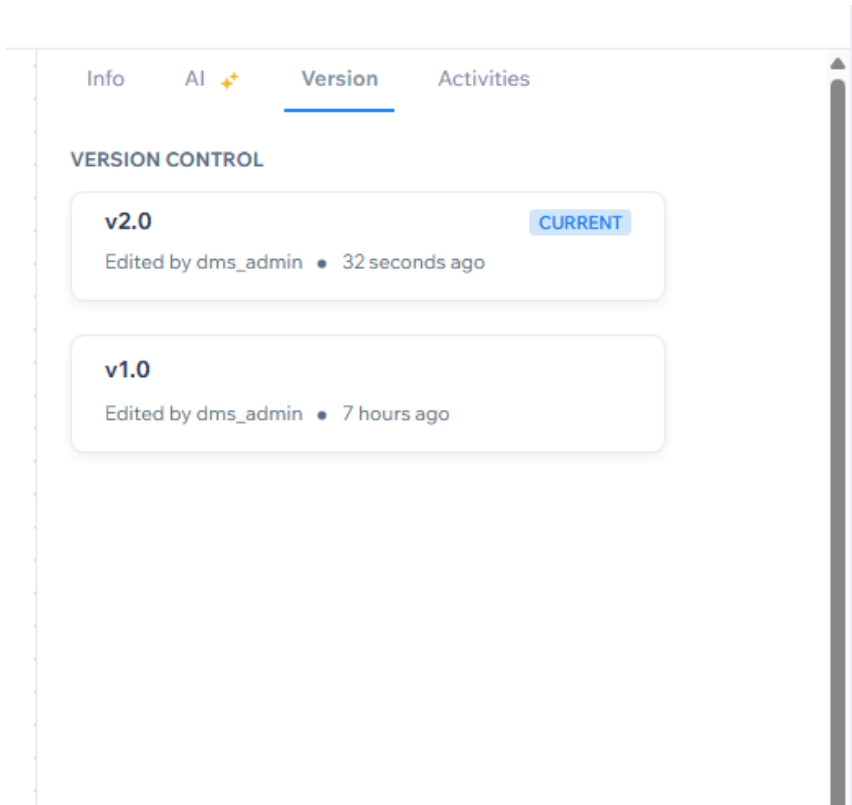
SIMILAR DOCUMENTS

Word Book.pdf
Uploaded 25 Apr 2026
42% Match

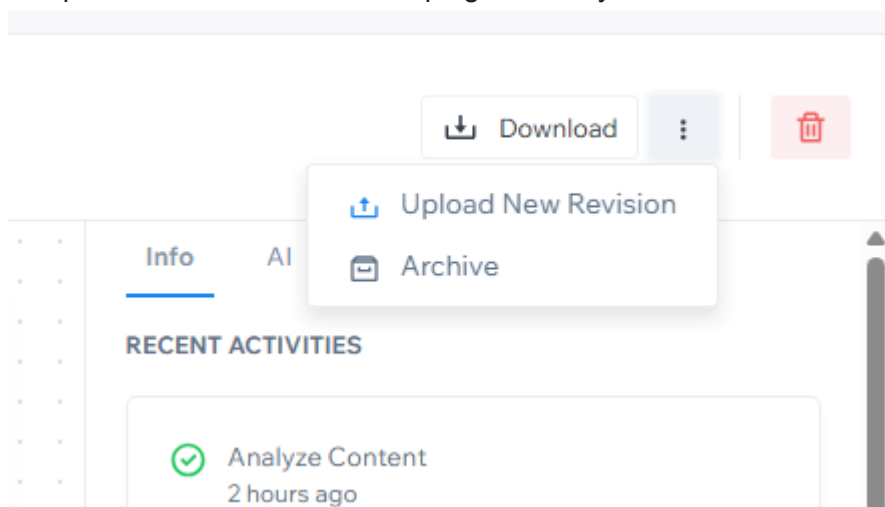
- **Tag Suggestions:** The system analyzes your document and suggests relevant tags. Click + to accept or **Apply** to save them.
- **AI Summary:** View or generate a one-click summary of the document's content.
- **Similar Documents:** The AI calculates a "match score" to suggest other documents in your library that are contextually related.

3. Versions Tab

Contuitive DMS maintains a complete history of your document.



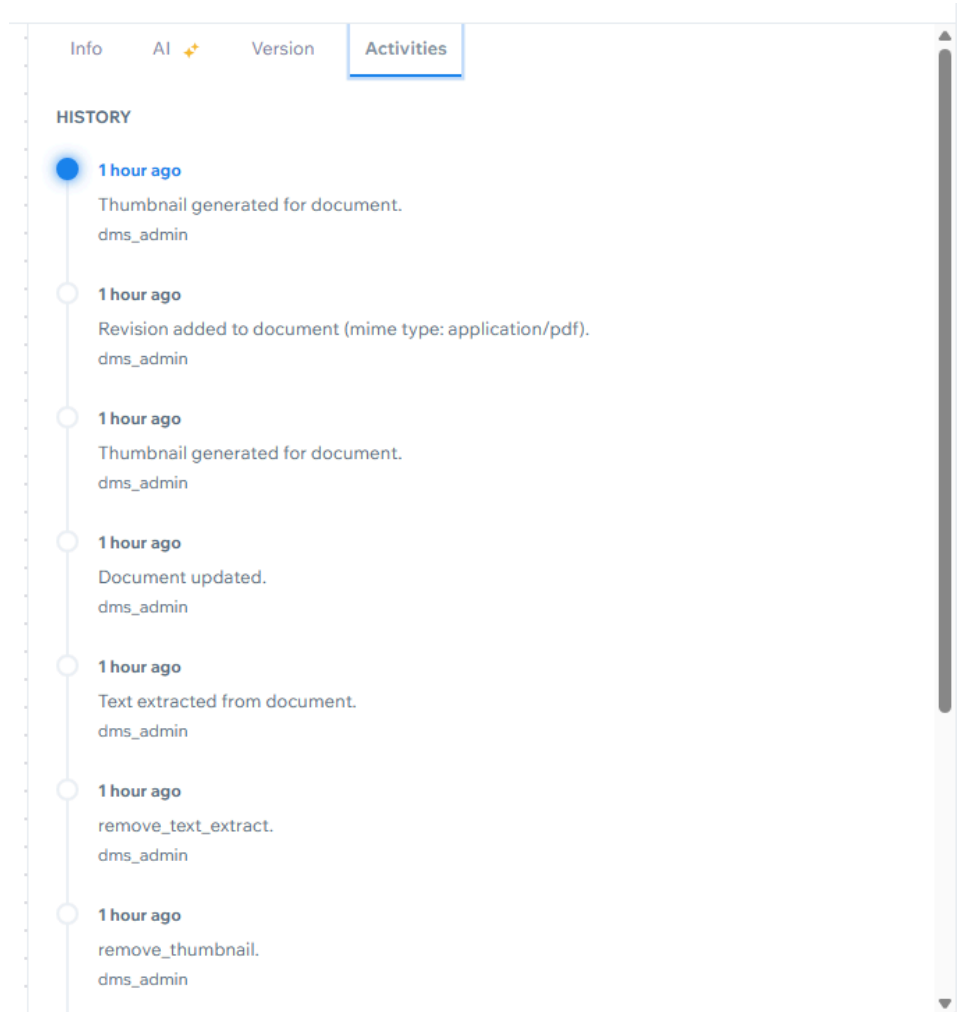
- **New Revisions:** Click the **three dots (...)** on the top bar and select **Upload New Revision** to replace a document while keeping its history.



- **Restoration:** Hover over any previous version and click **Restore** to make an older version the current active document.

4. Activities Tab

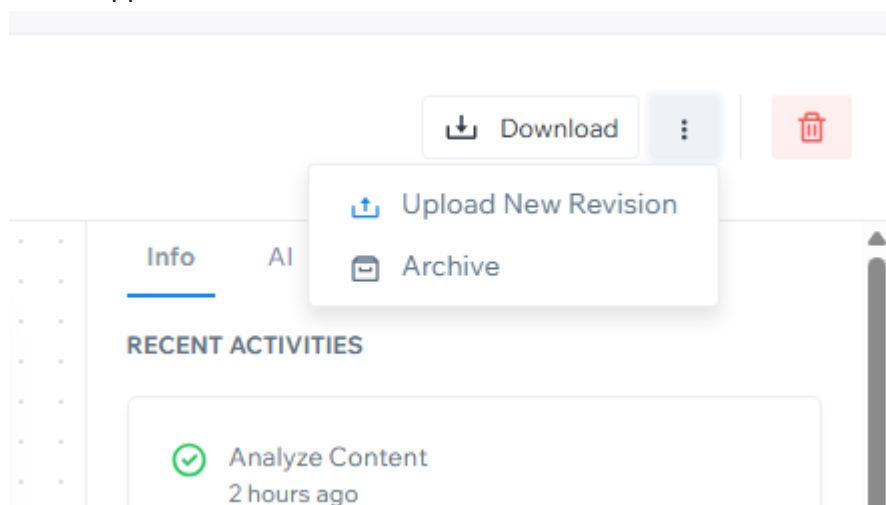
A complete, **audit-compliant log** that tracks every action taken on the document—showing who did



what and when.

Archiving and Deletion

- **Archive:** Use this for documents that are no longer active but must be kept. Archived files do not appear in standard searches or workflows but can be restored at any time.



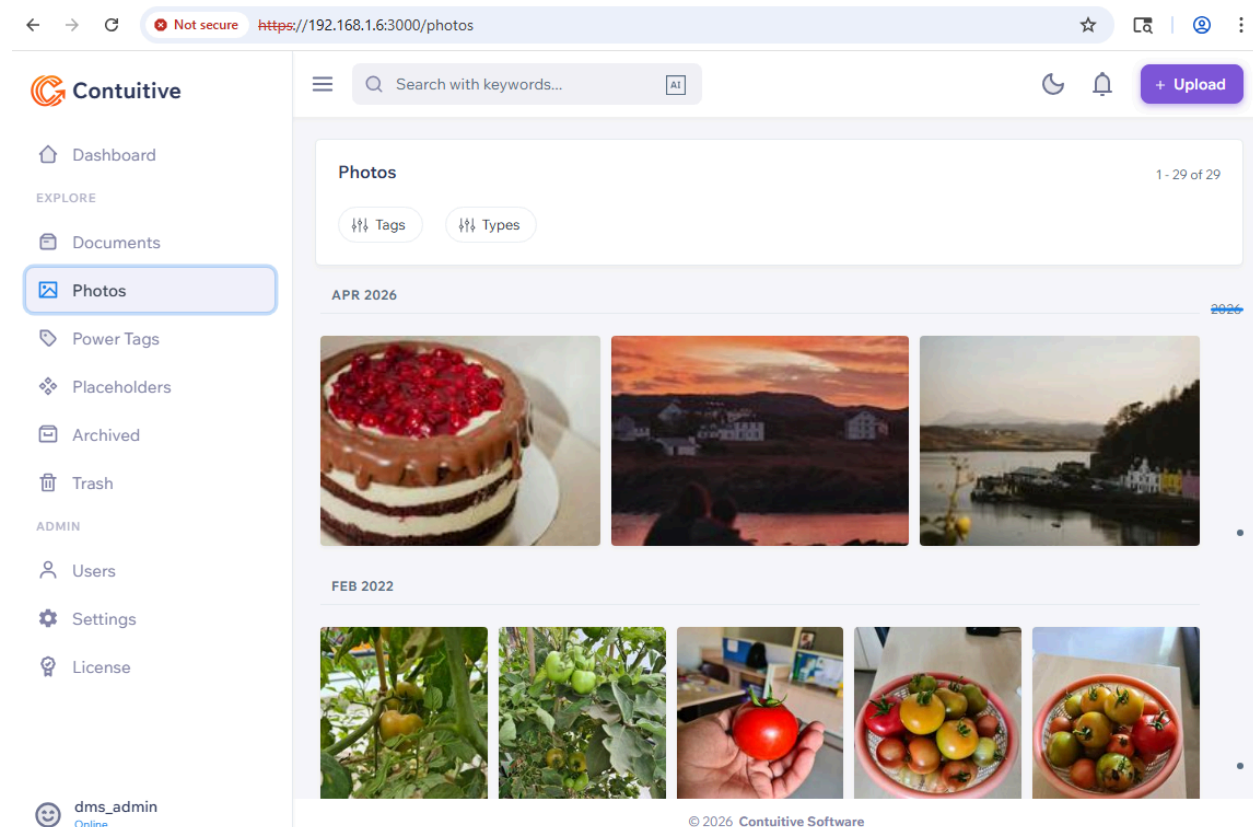
- **Trash:** Deleting a document moves it to the Trash. Files are held here for a set retention period (default 15 days) before permanent deletion. You can manually empty the trash to clear space immediately.

Photos in Contuitive DMS: More Than Just Storage

While traditional Document Management Systems (DMS) often overlook the importance of multimedia, **Contuitive DMS** treats your photos and videos as first-class citizens. We've built a dedicated **Photos App** feature designed to help you preserve, search, and relive your personal and family memories with the same rigor you apply to your professional documents.

A Modern Multimedia Experience

The Photos feature isn't just a folder; it's a fully realized gallery interface that mirrors the ease of dedicated mobile photo apps while offering the structural power of a DMS.

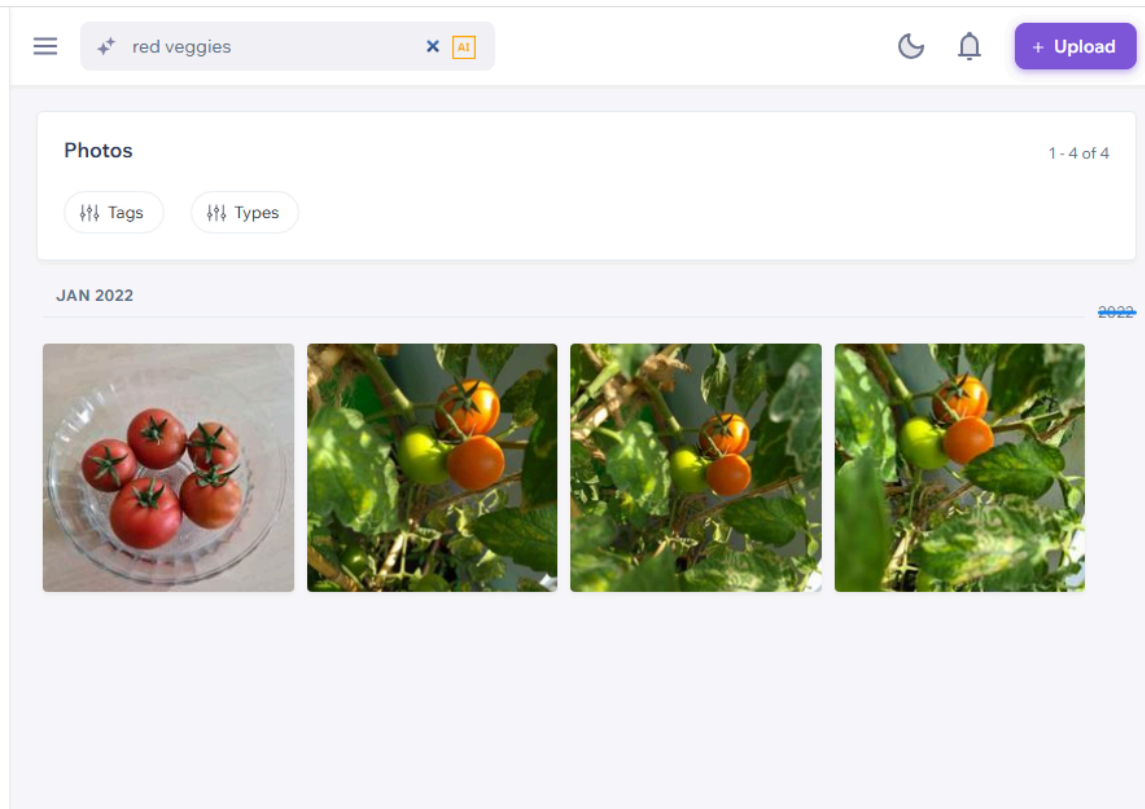


- **Timeline View:** Browse your entire collection in a standard, intuitive timeline. This allows you to scroll through years of memories chronologically, making it easy to find specific events or eras.
- **Intuitive Navigation:** Use the timeline slider to jump quickly between dates, ensuring even the largest libraries remain navigable.

Bringing DMS Power to Your Gallery

Contuitive DMS enhances the standard photo-viewing experience by inheriting professional document management features:

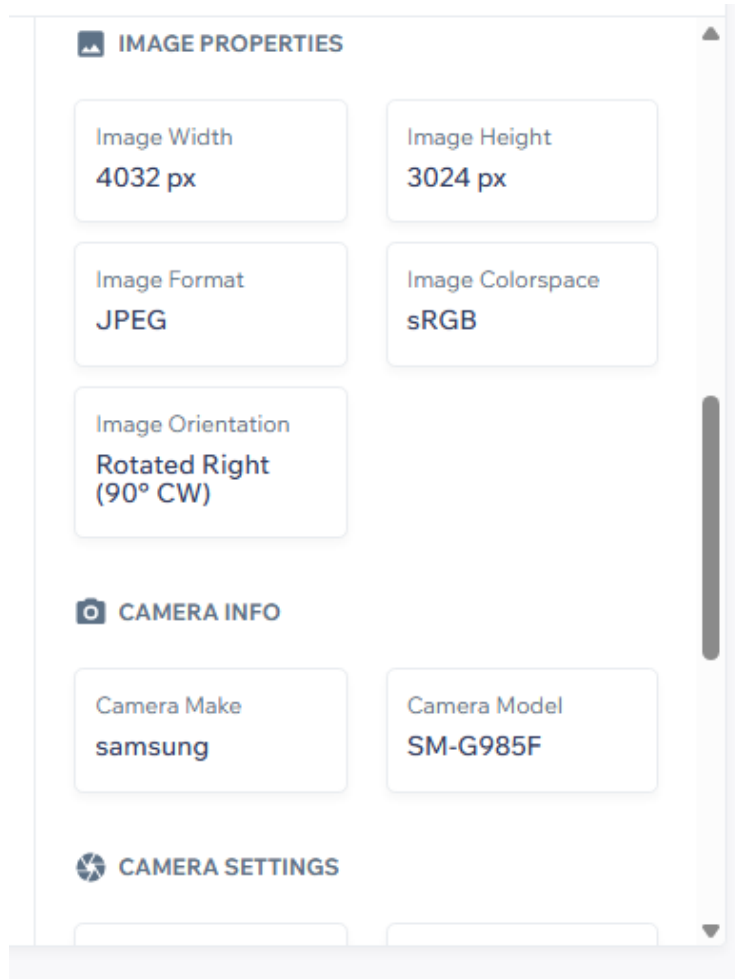
- **Photo Revisions:** Unique to Contuitive, you can create and track **revisions** of your photos. This is perfect for preserving original shots while keeping edited or retouched versions linked to the same entry.
- **Enriched Metadata:** Go beyond just looking at a file. You can add **Tags, Ratings, and Notes** to any image (e.g., tagging a photo with "My Baby's first walk"). This localized context makes your personal albums significantly easier to organize.
- **AI-Powered Search:** The system analyzes your photos using AI, inheriting powerful search capabilities. You can search for visual content directly—like typing "landscape" or "red veggies"—to find matching images instantly, even if you haven't manually tagged them.



Advanced Metadata and "Date Taken" Intelligence

We understand that metadata isn't always perfect, especially when photos are shared across different messaging apps. Contuitive DMS bridges these gaps with smart extraction tools:

- **EXIF Extraction:** The system automatically pulls **EXIF metadata** (such as camera model, aperture, and orientation) and presents it in a clean, readable user interface.



- **Intelligent Date Determination:** If a photo lacks EXIF data, the system intelligently tries to determine the "Date Taken" by analyzing **time-stamps in the file name**.
- **Manual Date Corrections:** If the auto-detection isn't quite right, you can manually edit the **"Original Date"** in the metadata view. This ensures your timeline view remains perfectly accurate, regardless of where the photo originated.

Data Sovereignty and Space

High-resolution photos and videos consume significant storage. While cloud services can become an expensive recurring cost for large collections, Contuitive DMS offers a more sustainable path.

- **Peace of Mind:** Get all the features of a modern cloud-based photo app while maintaining total **data sovereignty**.
- **Cost Efficiency:** By hosting your collection within your own DMS infrastructure, you avoid the escalating costs associated with massive cloud storage tiers without sacrificing the "intelligent" features you expect from a premium app.

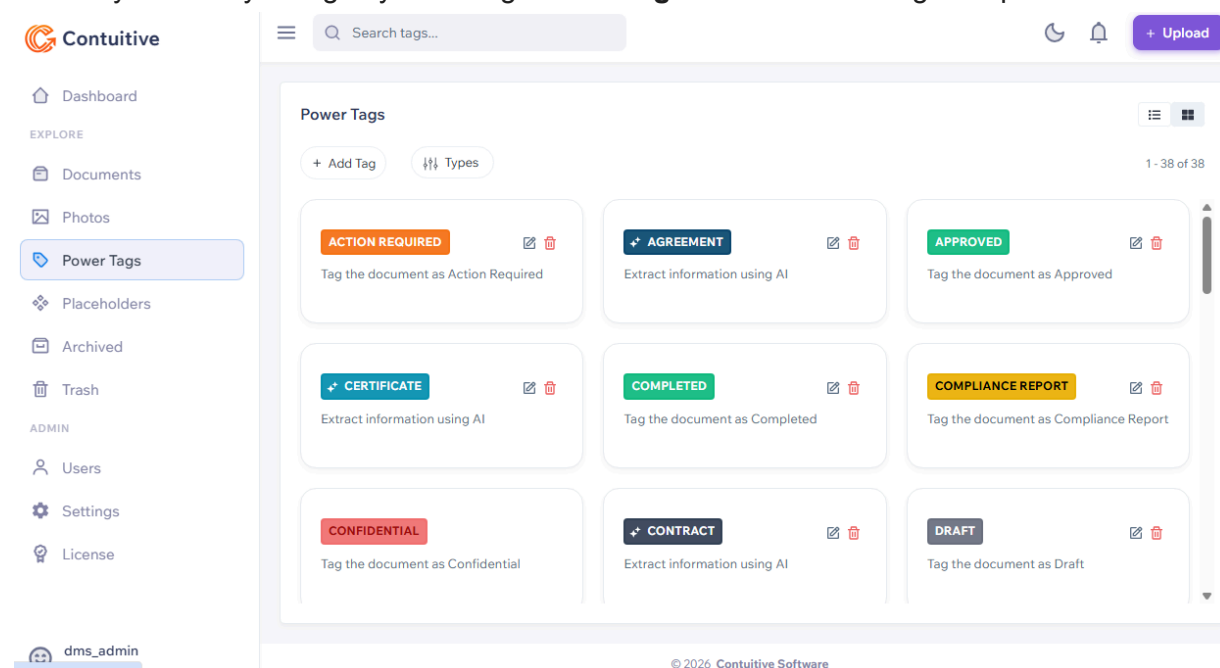
Tag Management

In traditional Document Management Systems, tags are passive labels used primarily for categorization. **Contuitive DMS** revolutionizes this concept with **Power Tags**—active building blocks that transform simple labels into automated workflows.

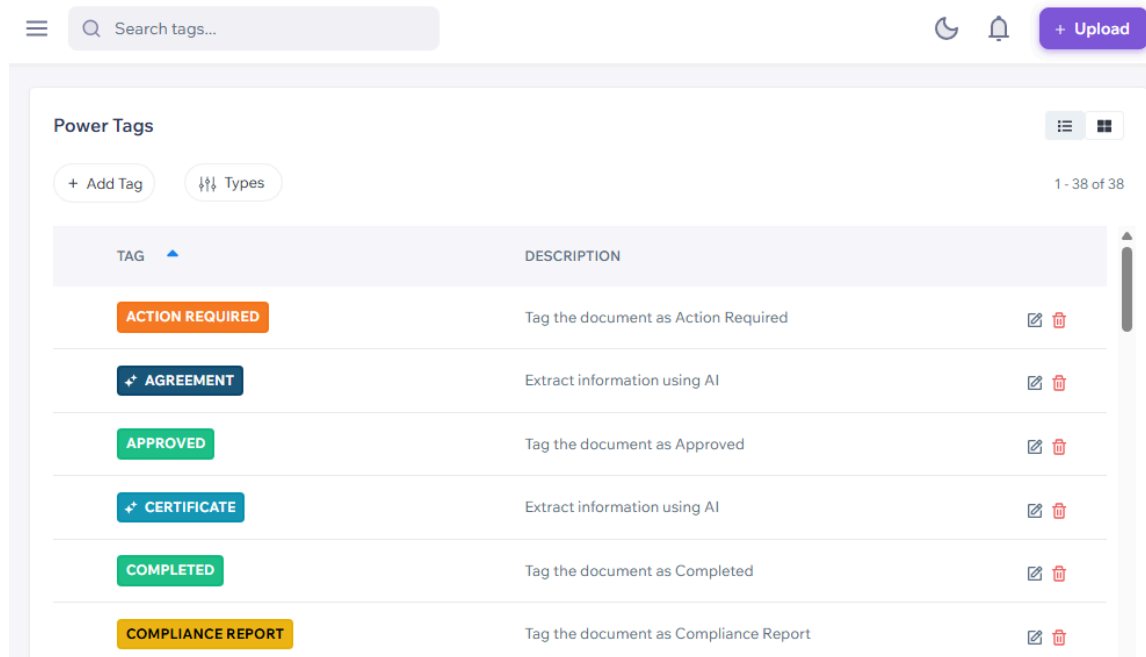
A Power Tag doesn't just describe a document; it performs actions. Whether you need to "Share this document with the Finance Team until Friday," "Extract data from a receipt," or "Archive this file at year-end," Power Tags handle the complexity in a few clicks.

Navigating Power Tags

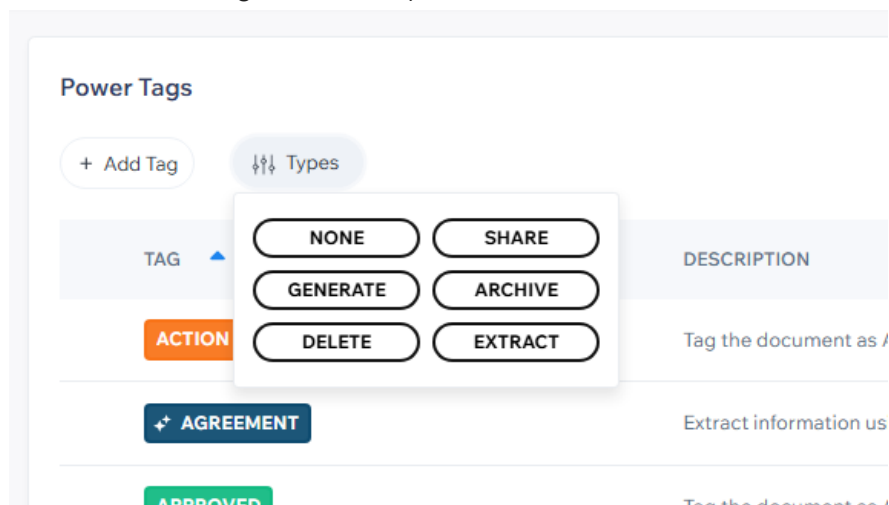
Access your library of tags by selecting **Power Tags** from the left navigation pane.



- **View Toggles:** Switch between **List View** (best for sorting by name) and **Card View** (best for visual recognition) using the toggle in the top-right corner.



- **Search & Sort:** Quickly find specific tags using the search bar. In List View, click the **Name** header to sort alphabetically.
- **Filtering:** Use the **Types** dropdown to filter tags based on their specific capabilities (e.g., Extraction, Sharing, or Archival).



Creating and Customizing Tags

Click the **+ Add Tag** button to design a new Power Tag.

1. Appearance & Theme

Beautify your tags to make them easily recognizable at a glance:

← Add Tag

APPEARANCE

BANK STATEMENT

Name

Bank Statement

Shape

☐ Round ☒ Rectangular

Theme

☐ ☐ ☐ [More](#)

RULE

When this tag is applied,

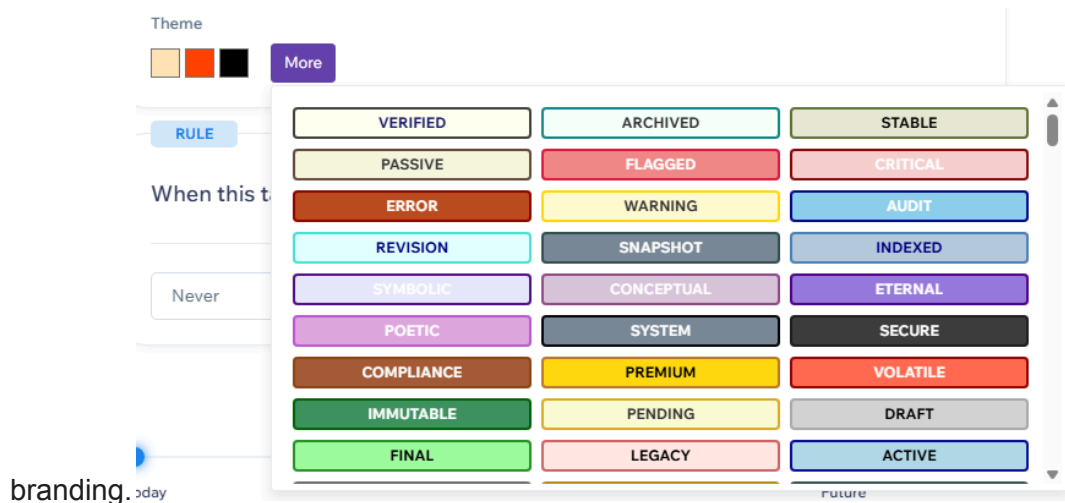
update this tag automatically

LIFECYCLE PREVIEW

Today Tagged as Bank Statement

Future Tagged as Bank Statement

- **Shape:** Choose between a modern **Round-cornered Pill** or a classic **Plain Rectangle**.
- **Theme:** Select from an exhaustive list of ready-to-use color themes by clicking **More**, or use the individual color pickers for **Background**, **Border**, and **Text** to match your organization's



2. Rules (Assigning Capabilities)

This section defines the "Power" of your tag. When a tag is applied to a document, it can trigger one of the following actions:

The screenshot shows a configuration window titled "RULE". It contains a section "When this tag is applied," with a dropdown menu currently open, displaying options: "Do nothing", "Share", "Generate", "Extract", "Archive", and "Delete". Below this, there is a "Never" dropdown and the text "update this tag automatically". At the bottom, there is a timeline slider from "Today" to "Future", both labeled "Tagged as Bank Statement". Below the slider are "Cancel" and "Save" buttons.

- **Share:** Automatically share the document with specific users or groups. Simply select **Share** from the dropdown and add the desired recipients.

The screenshot shows the same "RULE" configuration window, but now the "Share" option is selected in the dropdown menu. Below the dropdown, the text "the document with" is followed by a button labeled "DMS User 1" with a close icon, and a "+ Add User" button. At the bottom, there is a "Never" dropdown and the text "update this tag automatically".

- **Generate:** Used for template workflows to create pre-filled documents. You can set this to occur once or on a recurring schedule (Daily, Weekend, Month-end).

RULE

When this tag is applied, Generate ▼

the documents at Month end ▼ 11:59 PM ☐ Recurring

using Select File

Never ▼

LIFECYCLE PREVIEW

Today Tagged as Bank Statement 30 Apr 2026 23:59 Generate the documents Future Tagged as Bank Statement

- **Extract (AI-Powered):** Converts unstructured data (like images of visiting cards or receipts) into structured database fields.

RULE

When this tag is applied, Extract ▼

no field + Add Field from the document

Field Configuration Modal:

Name:

Type: Text ▼

Description:

Cancel Add

LIFECYCLE PREVIEW

Today Tagged as Bank Statement 30 Apr 2026 23:59 Generate the documents Future Tagged as Bank Statement

- Click **Add Field** to define what you want to capture (e.g., "Vendor Name").
- **Pro Tip:** Provide a clear **Description** for each field. The better the description, the more accurately the AI will identify and extract the data.
- Extracted data appears as document attributes in your main Document View, where they can be sorted and searched.

- **Archive/Delete:** Automate document lifecycles based on relative schedules.

RULE

When this tag is applied,

Archive

the document

Weekly on

Sunday

11:59 PM

Never

update this tag automatically

- **Relative Scheduling:** If you set a "Delete" action for "Year-end" and apply it in March, the document will move to the **Trash** on December 31st.
- **Note:** The "Delete" action is a safety-first feature; documents move to the Trash for the duration of your retention period rather than being permanently erased immediately.

Tag Lifecycle & Workflow Chaining

Power Tags are designed to be chained together to create sophisticated, hands-free workflows. You can configure a tag to **Remove** itself or **Replace** itself with another tag after a specific duration.

Remove tag

automatically

at

Month end

11:59 PM

Replace tag with

COMPLETED

Select Tag

on

Weekend

11:59 PM

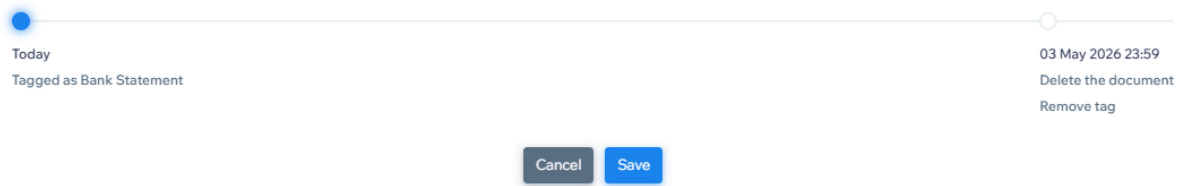
Example Workflow:

"Share this document with the legal team until the weekend, then archive it."

1. Apply a **"Legal Share"** tag configured to share with the Legal Group.
2. Set that tag's lifecycle to **Replace** with an **"Auto-Archive"** tag on the upcoming weekend.

Visual Understanding:

- **Lifecycle Graph:** The system provides a graphical representation of the tag's scheduled path for total clarity.



- **Action Icons:** Each tag displays a small icon representing its primary power (e.g., a share symbol or a trash can), allowing you to know exactly what a tag will do before you apply it.

Contuitive DMS comes preloaded with a variety of generic Power Tags, allowing you to begin automating your document management the moment you on-board.

Templating Engine: Professional Document Automation

In a high-velocity corporate environment, consistency and speed are the pillars of productivity. The manual "copy-paste" method is a relic of the past that invites human error and slows down operations. **Contuitive DMS** transforms this workflow, replacing tedious clerical tasks with an automated, AI-ready templating engine.

Core Benefits for Office Teams

Implementing a structured templating engine fundamentally changes how high-stakes paperwork is handled.

- **Elimination of "Copy-Paste" Errors:** Contuitive DMS pulls data directly from your records and injects it into designated placeholders. This ensures that a previous client's name or an expired date never accidentally appears in a new contract.
- **Radical Time Savings:** Drafting a 10-page legal agreement that once took hours now takes seconds. Employees simply provide the variables—names, dates, and figures—and the engine renders the final document instantly.
- **Brand & Formatting Consistency:** Every document, from internal HR memos to external vendor contracts, adheres to your specific fonts, logos, and margins. The layout is locked within the master template, preventing accidental design "breaks."
- **Centralized Placeholder Management:** Update a company address or a legal clause in one place, and every document generated from that point forward will reflect the current information.
- **Power Tag Integration:** Unique to Contuitive DMS is the ability to trigger generation via **Power Tags**. For example, applying a "Monthly Report" tag can automatically trigger the engine to generate a pre-filled template on the last day of the month.

The "Bring Your Own Editor" Philosophy

Contuitive DMS redefines the user experience by allowing you to create templates in the software you already use, such as **Microsoft Word**, **Google Docs**, or **LibreOffice**. There is no proprietary editor to learn and no design restrictions.

How it Works: The Placeholder Syntax

Templates are standard **.docx** files containing dynamic fields. To create a field, wrap a name in double curly braces: `{{PLACEHOLDER_NAME}}`. The engine honors all visual styles—bolding, colors, and specific fonts—during generation.

Placeholder Type	Definition	Example Implementation

Text	Standard alphanumeric data strings.	{{CLIENT_NAME}}
Image	Dynamic logos, signatures, or photos.	Picture Box with Alt-Text set to {{USER_SIGNATURE}}



To Whom It May Concern

This is to certify that {{EMP_NAME}} (Emp Code {{EMP_CODE}}) was a part of our organization Contuitive Software from {{START_DATE}} to {{END_DATE}}. He worked as {{DESIGNATION}} with us.

During this period, we found him to be sincere, talented and hardworking. He has shown a great sense of achievement, and we wish him the best of luck for his future endeavors.

Thanking you,

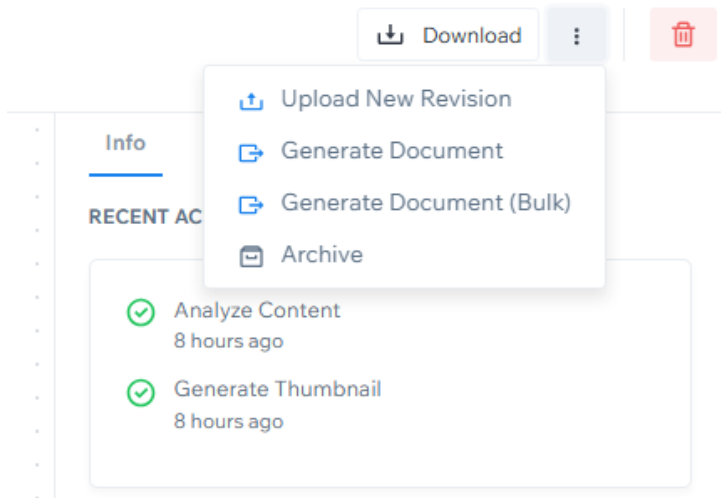
{{DIRECTOR_NAME}}

(Director R&D, Contuitive Software)

Email: contact@contuitive.com
Phone: 950-123-5678

Document Generation Workflows

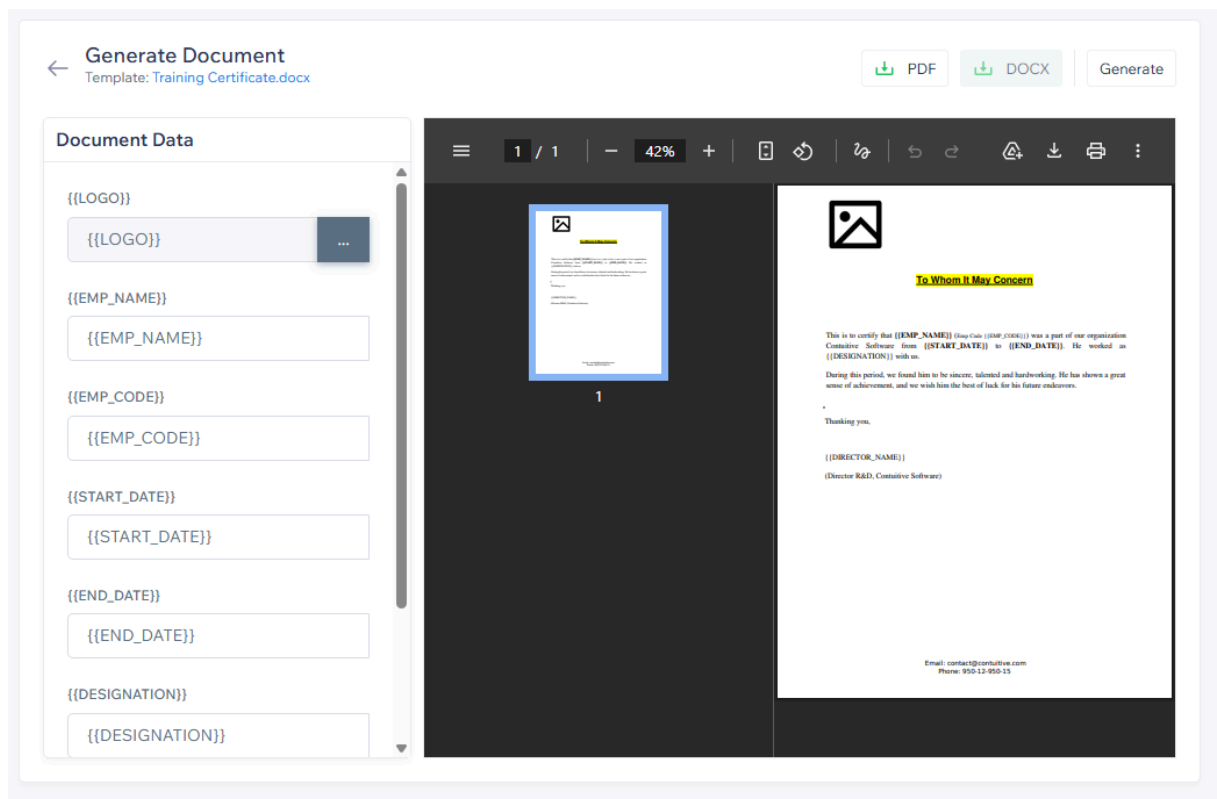
Once your template is uploaded, navigate to the **Document Details** view and click the **options (three dots)** menu to choose your workflow.



1. Single Document Generation

Best for bespoke agreements or one-off letters.

- Select **Generate Document** to open the data-entry interface.
- Fill in the values for the identified placeholders.



- Preview the document live by clicking on the “Generate” button and download as a **PDF** or **DOCX**.

2. Bulk Generation (CSV-Powered)

Ideal for high-volume tasks like monthly invoicing or mass mailings.

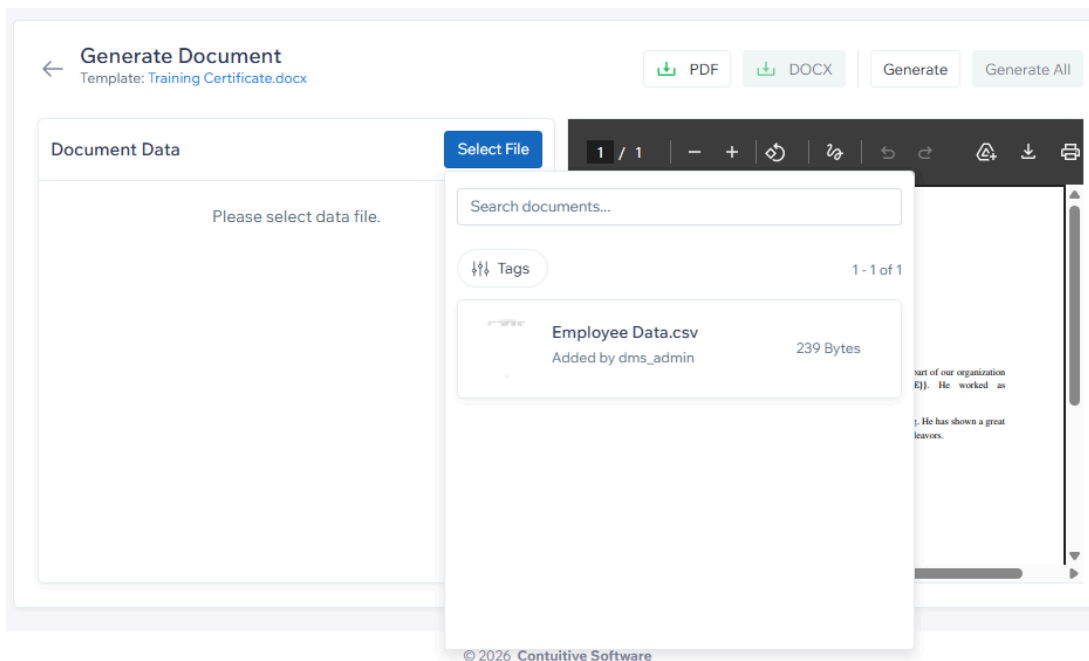
- **Prepare Data:** Create a CSV file where the column headers exactly match your template's placeholder names and upload the csv to Contuitive DMS.

```

Data (3).csv
Scroll Tabs
1  {{EMP_NAME}},{{EMP_CODE}},{{START_DATE}},{{END_DATE}},{{DESIGNATION}},{{DIRECTOR_NAME}}
2  Reece,1001,01-01-2025,01-01-3025,Architect,Sino
3  Amber,1002,02-01-2025,01-01-3026,Engineer,Sino
4  Rex,1003,03-01-2025,01-01-3027,Sr. Engineer,Sino
5

```

- **Upload & Map:** Select the CSV in the "Document Data" section.



- **Process:** Generate documents for specific rows or click **Generate All** to queue the entire batch. Progress can be tracked in the **Activities** pane.

Generate Document
Template: Training Certificate.docx

PDF DOCX Generate Generate All

Document Data
File: Employee Data.csv

	{{LOGO}}	{{EMP_NAME}}	{{EMP_CODE}}	{{START_DATE}}	{{END_DATE}}
✓		Reece	1001	01-01-2025	01-01-2025
✓		Amber	1002	02-01-2025	01-01-2025
✓		Rex	1003	03-01-2025	01-01-2025

Select File

1 / 1

To Whom It May Concern,

This is to certify that {{EMP_NAME}} ({{EMP_CODE}}) has completed the Contuitive Software from {{START_DATE}} to {{END_DATE}}.

During this period, we found him to be sincere and hardworking, and we wish him the best of luck in his future endeavors.

Thanking you,

{{DIRECTOR_NAME}}
(Director of IT, Contuitive Software)

Intelligent Placeholder Management

While the system treats all `{{ }}` markers as text by default, you can add **System Logic** by navigating to the **Placeholders** tab in the left pane.

Placeholders

+ Add Placeholder Types 1 - 2 of 2

Employee Name {{EMPLOYEE_NAME}}	Joining Date {{JOINING_DATE}}
------------------------------------	----------------------------------

- **Validation:** Assign types like **Number** or **Date/Time** to ensure data integrity (e.g., preventing text from being entered into a "Price" field).
- **Default Values:** Set global defaults so that if a field is left blank during generation, the system automatically fills it with your preferred data (e.g., `{{OFFICE_LOCATION}}` defaulting to your main headquarters).

Safe Deletion Logic: There is no "hard-binding" between placeholders and templates. If you delete a placeholder from the management list, your templates will not break; the system will simply treat that marker as a plain-text field without validation.

Real-World Applications

- **Human Resources:** Generate hundreds of tax forms, NDAs, or offer letters in minutes using Bulk Generation.
- **Legal Departments:** Ensure every contract adheres to corporate styling while instantly swapping party names and dates.
- **Sales & Operations:** Produce tailored quotes and invoices with dynamic product images and pricing tables that meet your brand standards.

By combining the familiarity of professional word processors with a modern, AI-powered automation engine, **Contuitive DMS** ensures every document leaving your desk is accurate, professional, and perfectly formatted.

Automating Bulk Workflows with Power Tags & Templates

In **Contuitive DMS**, the synergy between Power Tags and the Templating Engine allows you to move beyond manual document creation into full-scale automation. By combining these two features, you can schedule the bulk generation of documents using external data sources like CSV files.

Scheduled Bulk Generation: A Step-by-Step Guide

This workflow is ideal for recurring tasks such as monthly invoicing, quarterly reports, or scheduled compliance certificates.

1. Prepare Your Data

Create a **CSV file** where the column headers exactly match the placeholder names used in your .docx templates (e.g., `{{CLIENT_NAME}}`, `{{DUE_DATE}}`).

2. Configure the Power Tag

Navigate to **Power Tags** and click **+ Add Tag**:

- **Action:** Select the **Generate** action from the rules dropdown.
- **Data Source:** Upload or select your prepared CSV file.
- **Schedule:** Set the generation frequency. You can choose to run the task **Once** at a specific time or set a **Recurring** schedule (e.g., Every Monday, Month-end, or Year-end).

The screenshot shows a configuration window titled "RULE". It contains the following elements:

- When this tag is applied,** followed by a dropdown menu set to "Generate".
- the documents at** followed by a dropdown menu set to "Month end", a time input field set to "5:00 PM", and a checked checkbox labeled "Recurring".
- using** followed by the text "Employee Data.csv" and a blue "Select File" button.
- At the bottom, a dropdown menu set to "Never" followed by the text "update this tag automatically".

3. Apply and Automate

Apply this newly created Power Tag to your desired template document. Contuitive DMS will now monitor the schedule and automatically generate the documents using the data provided in the CSV.

Advanced Automation Features

The Power Tag integration offers unique advantages designed for dynamic business environments:

- **Always-Current Data:** When you upload a **New Revision** of your data CSV, the Power Tag automatically identifies it. The system will always pick the latest version of the file for the next scheduled generation, ensuring your documents never use stale data.
- **Cross-Template Reusability:** You can apply the same "Generate" Power Tag to multiple different templates. The engine is intelligent enough to only pick the placeholder values that exist within each specific template. This allows you to maintain one master data file (like a "Client List") and use it to power NDAs, Service Agreements, and Welcome Letters simultaneously.
- **Hands-Free Processing:** Once the tag is applied and the schedule is set, the system handles the heavy lifting in the background. You can track progress and download the output files from the document's **Activities** pane at your convenience.

Pro-Tip: Chain with Lifecycle Rules

To create an end-to-end automated pipeline, you can combine these "Generate" actions with lifecycle rules. For example, you can set a tag to **Generate** a monthly report, and then **Replace** itself with an **Archive** tag seven days later, keeping your dashboard clean and your records compliant without a single manual click.

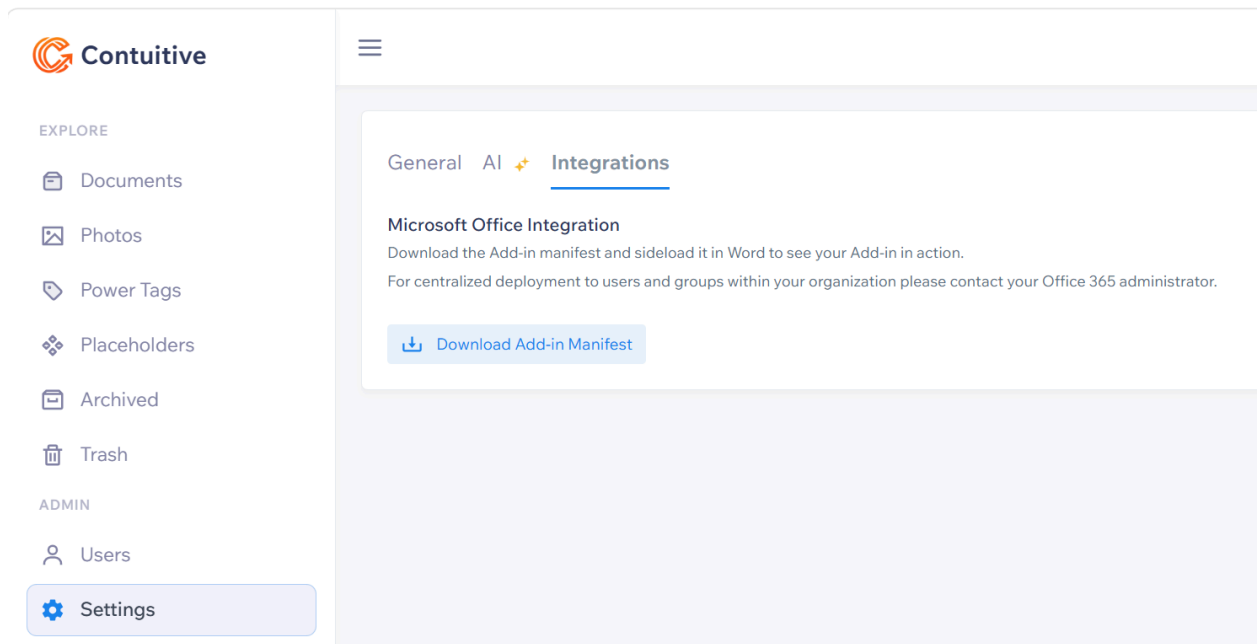
Office Integration: Contuitive DMS for Microsoft Word

Contuitive DMS provides a seamless integration with **Microsoft Word Online**, allowing you to create, manage, and edit template documents directly within your browser. This integration centralizes your document management by connecting Word's editing power with the DMS server's storage and placeholder systems.

1. Getting Started: Activation and Authentication

The integration is powered by a dedicated **task pane** that acts as your gateway to the DMS server.

- **Installation:** Navigate to Contuitive DMS settings and download Add-in manifest



Once downloaded, you have following options to install Add-in

Sideloading:

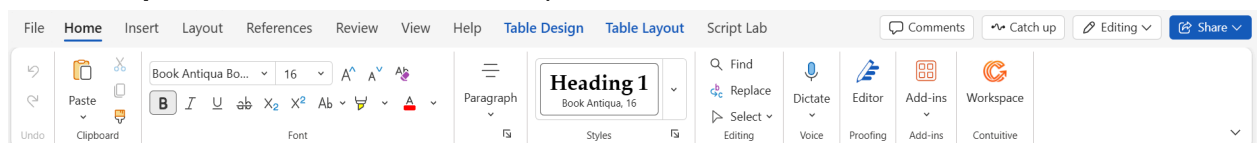
1. Open Word
2. Navigate to **Upload My Add-in** option under **Home->Add-ins**
3. Select the manifest file to load the add-in

Centralized Deployment (Admin Only):

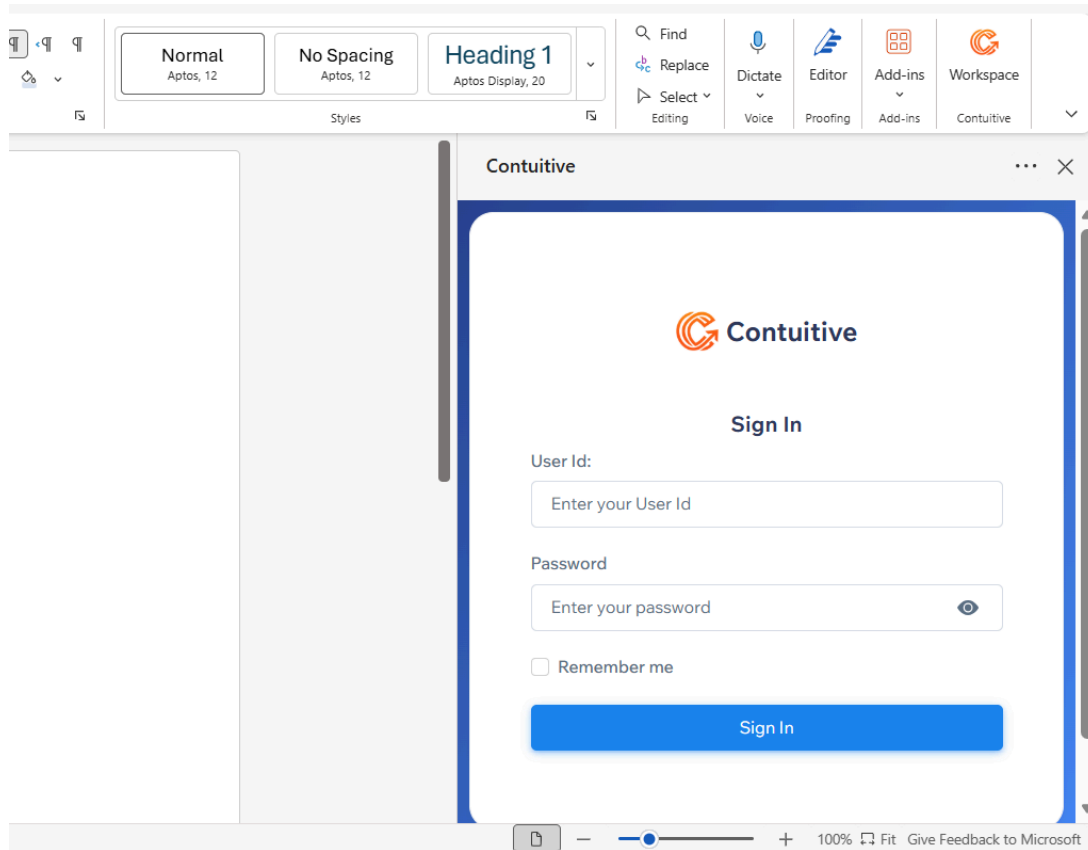
Admins can push add-ins to all users in Microsoft 365.

1. Sign in to **Microsoft 365 Admin Center**
2. Go to **Settings** → **Integrated Apps**
3. Upload the manifest
4. Assign deployment to users, groups
5. Add-in appears automatically in Word for assigned users

- **Activation:** To enable the Add-in, you must first create a new document or open an existing file within **OneDrive**.
- **Opening the Workspace:** Navigate to the **Home** tab and locate the **Contuitive** group. Click the **Workspace** button to launch the task pane.



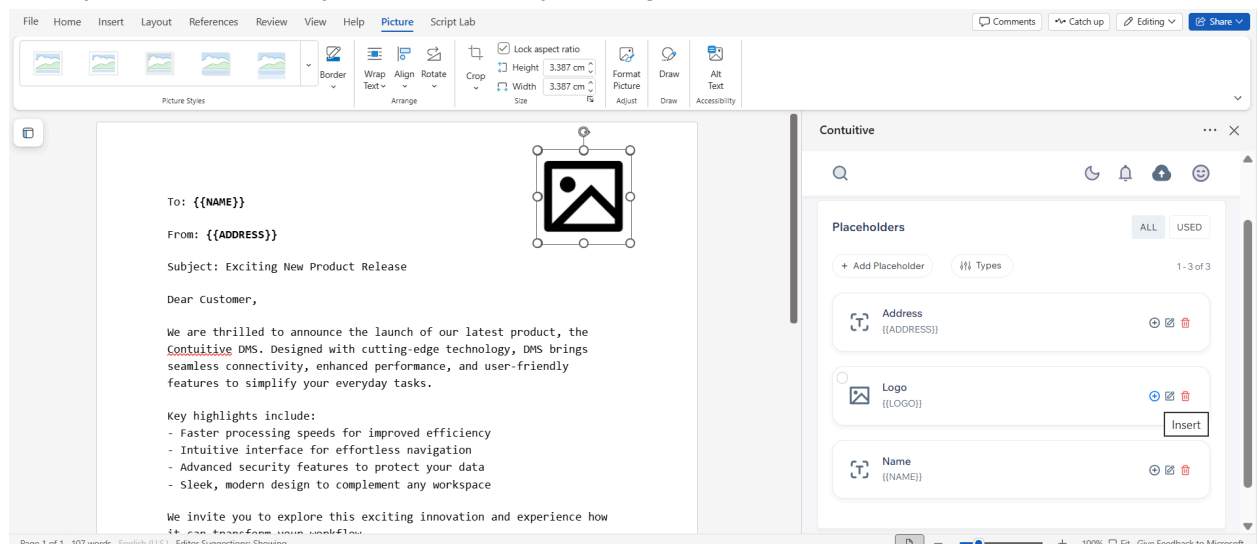
- **Sign-In:** If prompted, enter your credentials on the **Sign In** screen to securely link your Word session to the DMS server.



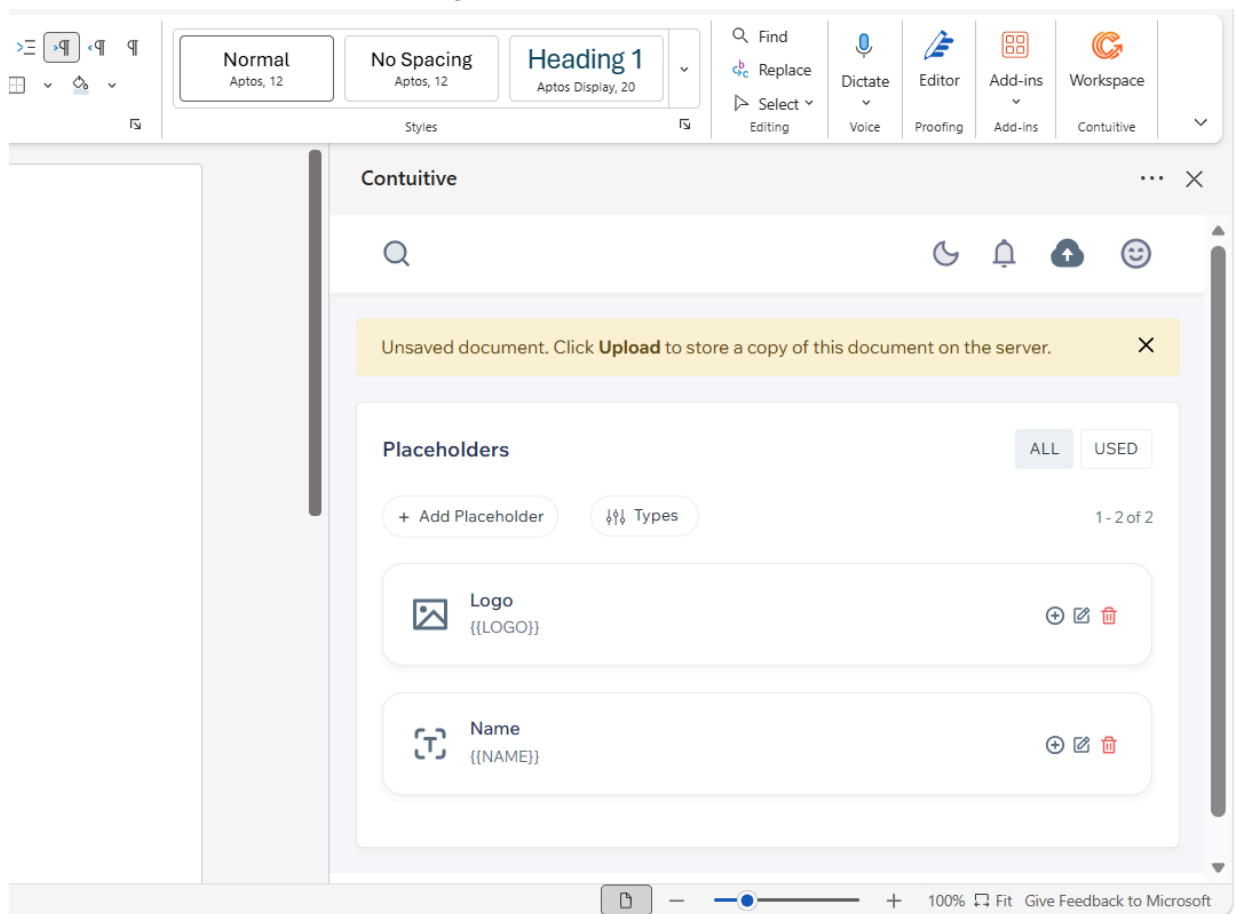
2. Creating New Templates

Building a template involves drafting content and mapping it to system data using placeholders.

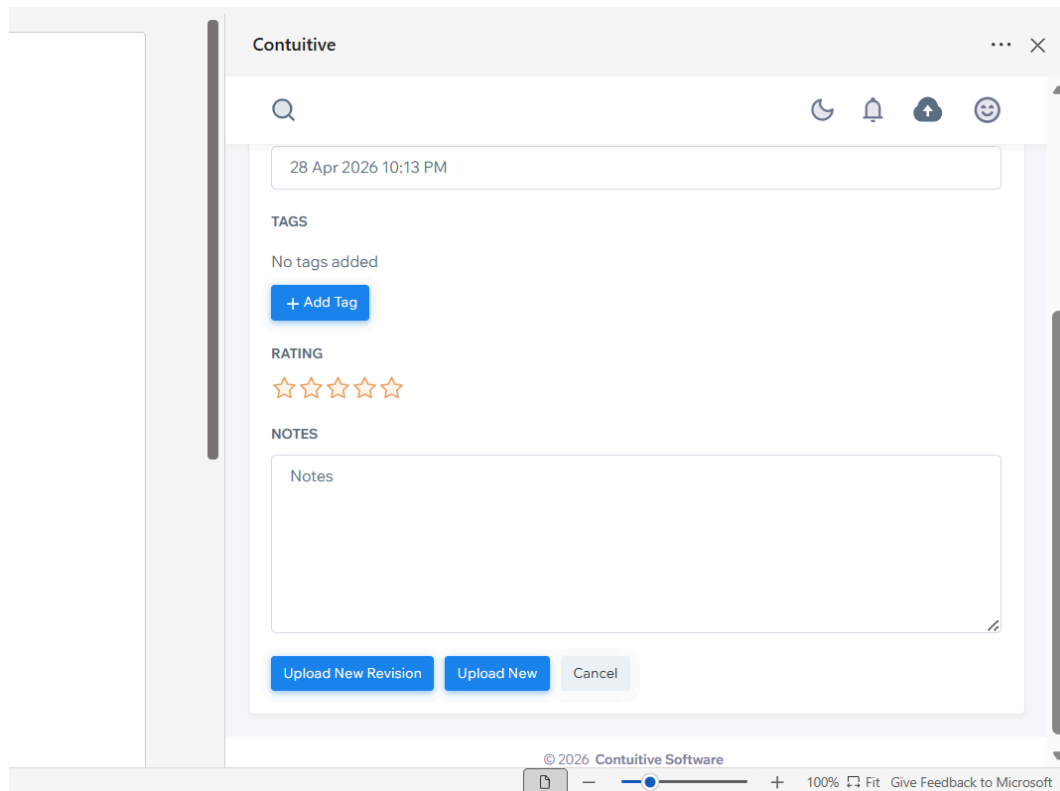
1. **Draft Content:** Create a new document in Word Online and add your desired text and layout.
2. **Insert Placeholders:** Browse the list of available system markers in the task pane. You can directly insert these into your document by clicking the **Insert** icon next to a placeholder.



3. **Initial Upload:** If the document is not yet on the server, the task pane will display an "Unsaved document" alert. Click **Upload** to bring up the metadata screen where you can set the document name, dates, and tags.



4. **Save Options:** When ready, you can choose to **Upload New Revision** to update an existing file or **Upload New** to create a separate entry on the server. You can also save ratings, tags and notes along with the document.



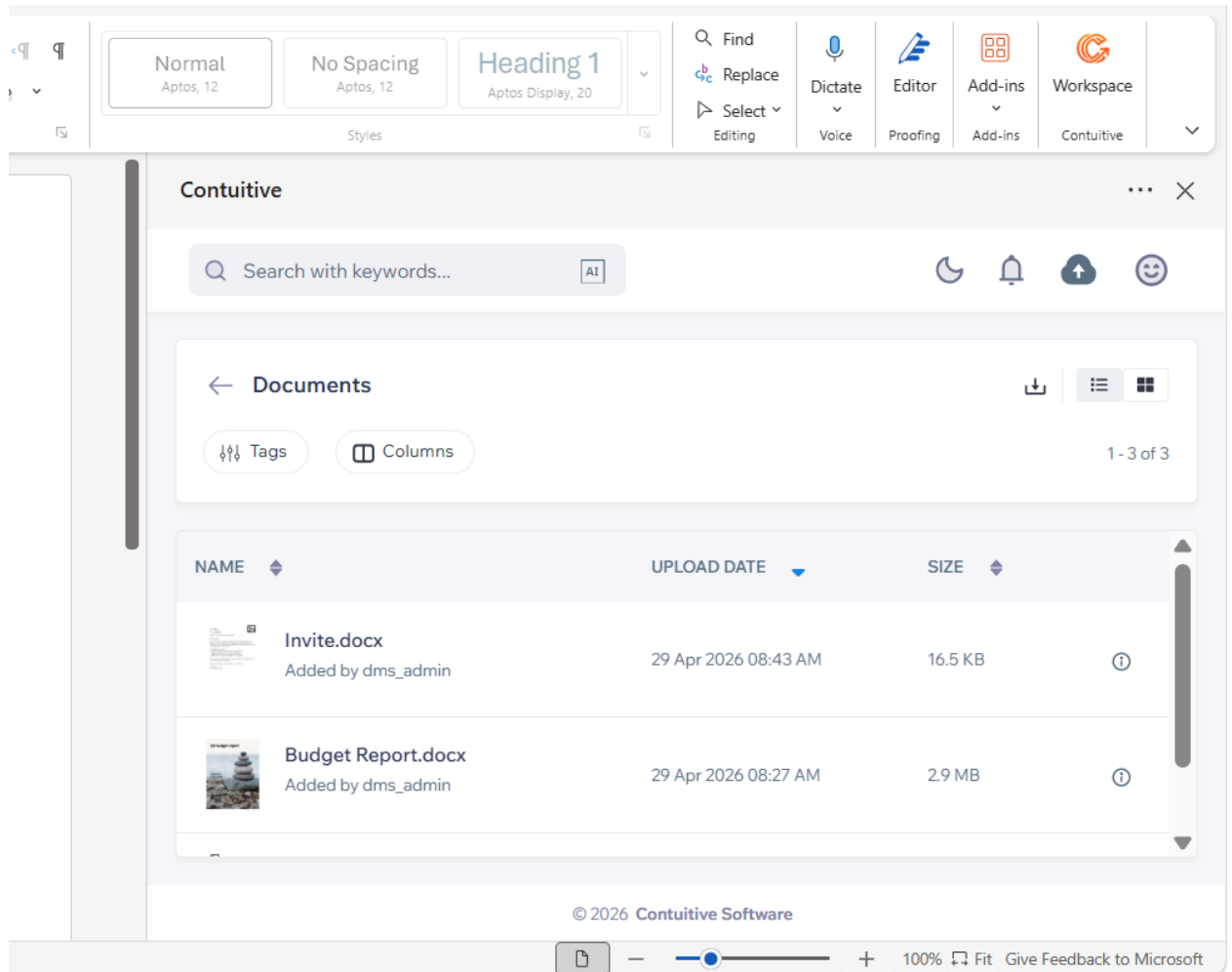
3. Editing and Lifecycle Management

The Add-in maintains a persistent link between your OneDrive copy and the version stored on the DMS server.

Browsing the Server

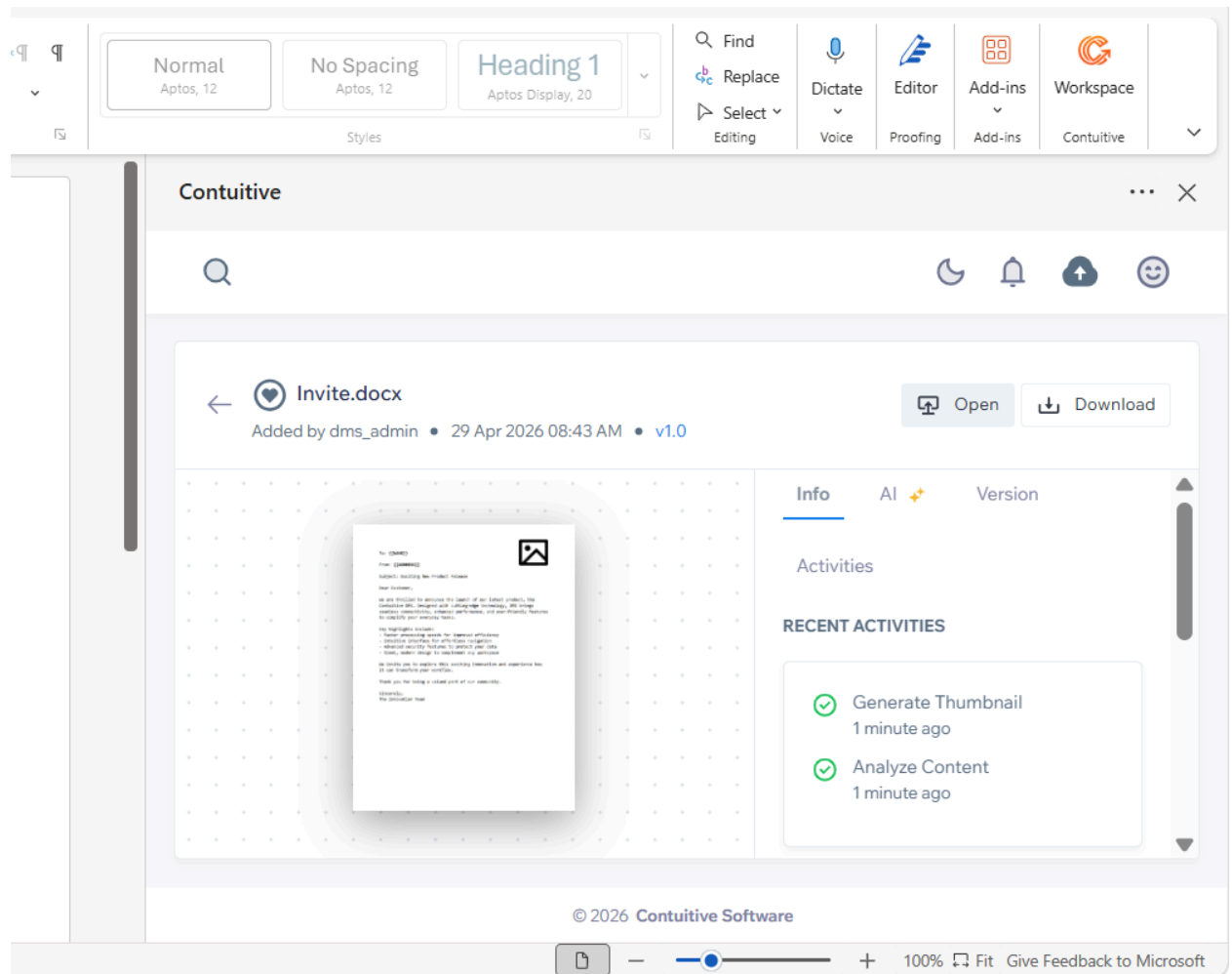
To work on an existing template, click the **Search** button in the task pane to view all available documents on the server. Selecting a document and clicking **Open** will generate a new OneDrive document in a new window, populated with the latest server content.

- Browse for the desired document and select it.



- Click the “**Open**” button to open it for editing. Clicking Open will generate a new OneDrive document in a new window, populated with the latest content from the template stored on the

server.

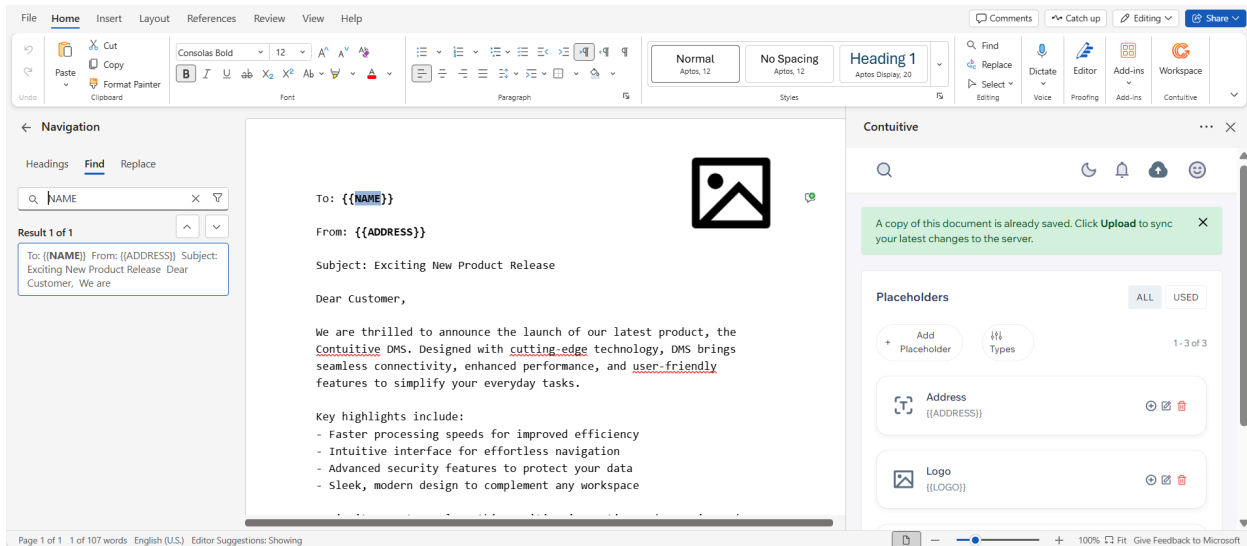


Syncing Changes

- **Version Tracking:** The system automatically tracks versioning (e.g., transitioning from **v1.0** to **v2.0**) as you upload changes.
- **Persistent Link:** Once you have finished editing and saved your changes to the server, you can safely close the document. You may delete your local OneDrive copy or keep it; reopening that specific file later and clicking upload will still update the correct corresponding document on the server.

4. Managing Placeholders

The Add-in dashboard provides a clear overview of both **All** available placeholders and those currently **Used** in your document.



- **Text Placeholders:** To locate specific text-based placeholders (like `{{NAME}}`), use Microsoft Word's standard **Find (Ctrl+F)** feature.
- **Image Placeholders:** To identify which system placeholder is controlling a specific image, right-click the image and check its **Alt Text**. If the Alt Text matches a placeholder tag (e.g., `{{LOGO}}`), the DMS will treat that image as a dynamic field.

Flexibility by Design: Using Contuitive DMS Without the Add-in

While the **Contuitive Office Add-in** is a powerful "wingman" for your workflow, it is by no means a mandatory requirement. It is an optional tool designed primarily to enhance your user experience, but the core functionality of the DMS remains fully accessible even without it.

Manual Placeholder Management

You have full creative control over your documents without needing to install a single piece of software. You can bridge the gap between your text and your data using simple, manual methods:

- **The `{{}}` Syntax:** Create your own placeholders on the fly by wrapping the field name in double curly braces (e.g., `{{CLIENT_NAME}}`).
- **Copy-Paste Efficiency:** To ensure total accuracy, you can find the exact placeholder names within the **Contuitive Web Interface**, copy them, and paste them directly into your Word document.
- **Universal Compatibility:** Since the system relies on standard text strings, you can draft your templates in any environment that supports `.docx` files.

Transparent and Robust Logic

The DMS is built on the principle of simplicity. It doesn't rely on "black box" algorithms or proprietary hidden metadata that could clutter your files:

- **Identifier Matching:** Contuitive DMS identifies and maps placeholders based strictly on their **names**.

- **Straightforward Processing:** As long as the server sees a name that matches your system configuration, it will process the field correctly.
- **No Hidden Complexity:** There is no complex logic under the hood; the system looks for the name, finds it, and fills it.

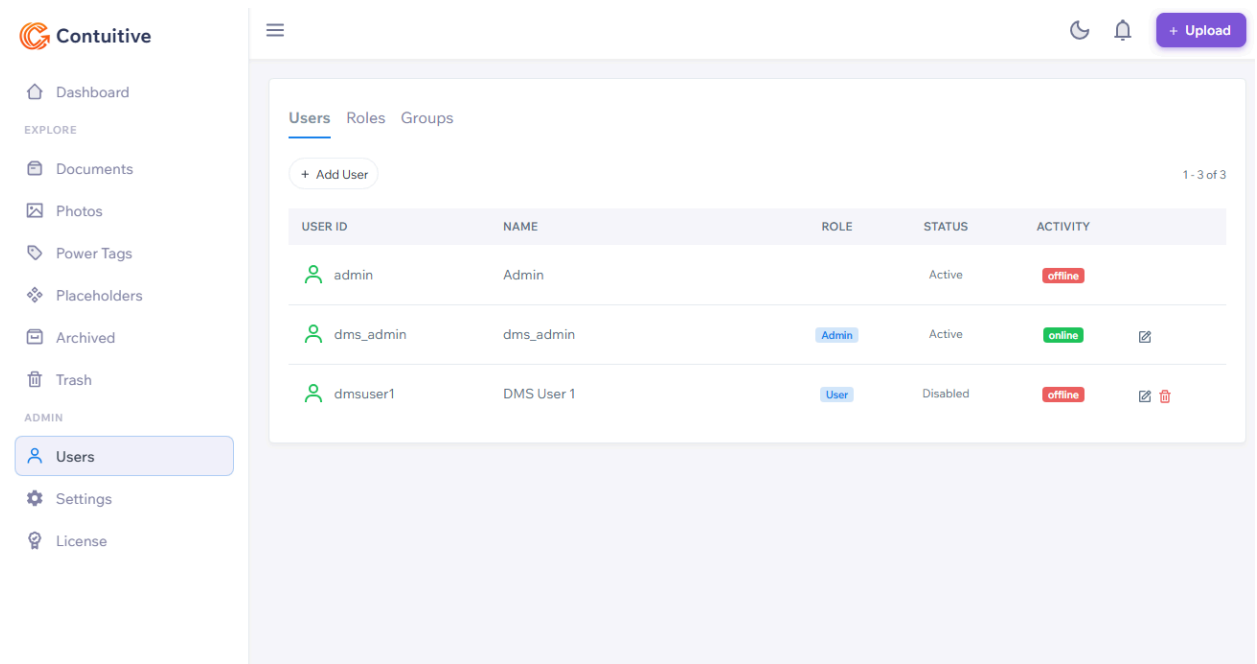
User and Access Control

User and Access Control

Contuitive DMS features a robust multi-user system designed for security and audit compliance. Administrators can manage users, assign specific roles, and control system access with granular precision.

Accessing User Management

To manage your team, navigate to the **Admin** section in the left sidebar and click on **Users**. Here you will find three primary tabs:



- **Users:** View, edit, and manage individual accounts.
- **Roles:** Create and configure permission sets.
- **Groups:** Organize users for easier document sharing.

Managing Roles

Roles determine exactly what a user can see and do within the system. Contuitive DMS provides both pre-configured roles and the ability to define custom ones.

Inbuilt Roles

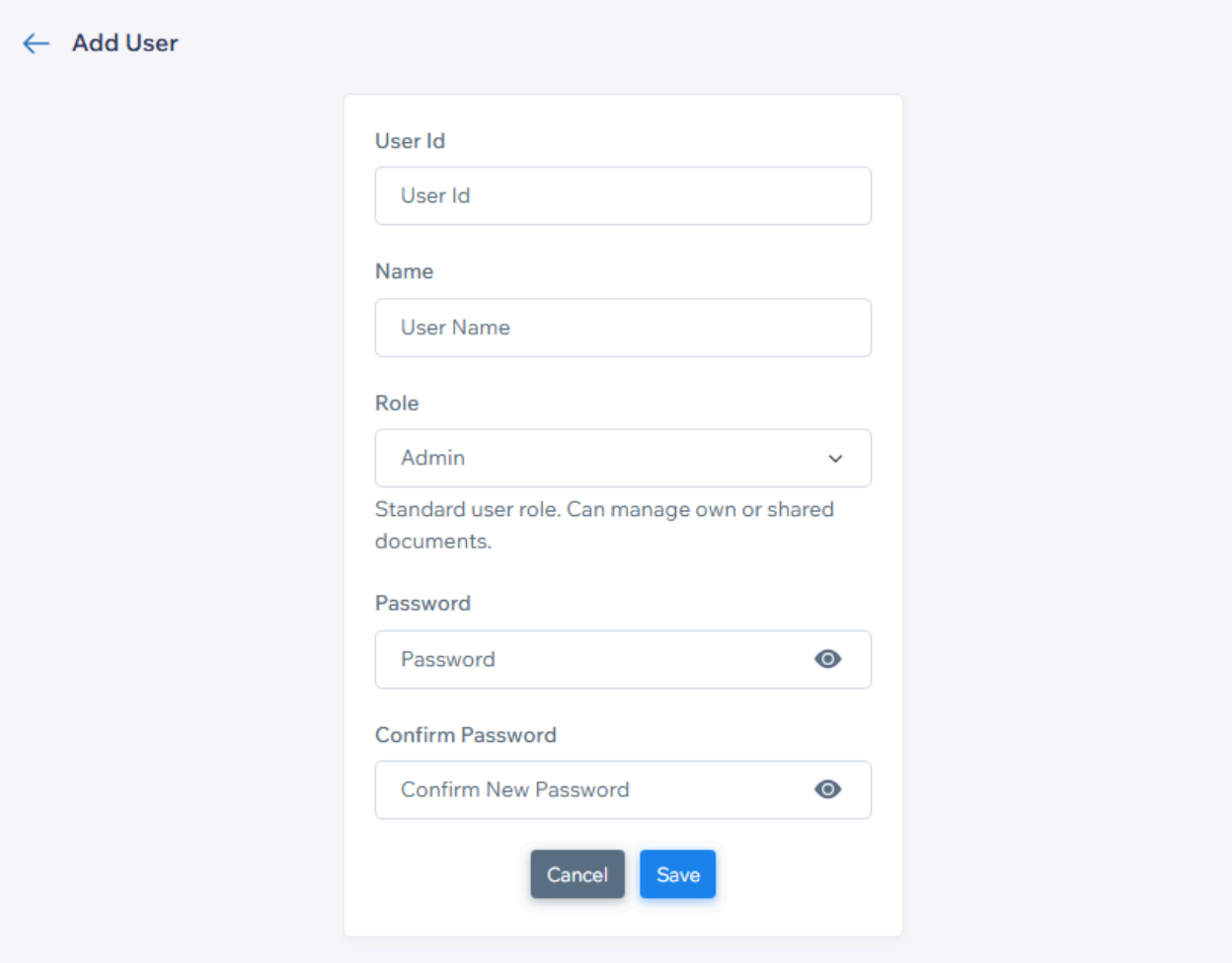
Role	Description
Admin	Full system control, including user management, settings, and license configuration.
User	Standard access. Users can upload and manage their own documents or those shared with them.
Guest	Read-only access. Guests can view shared documents but cannot upload, edit, or delete content.

Custom Roles

Beyond the standard presets, you can create **Custom Roles** to fit your specific workflow. By clicking on the **Roles** tab, you can define new roles with **filtered privileges**. This allows you to grant granular permissions—such as allowing a user to delete documents but not manage users, or giving them access to specific administrative settings without full "Admin" rights.

Adding a New User

1. Navigate to the **Users** tab and click the **+ Add User** button.



2. **User Id (Critical):** Enter a unique ID.

Audit Compliance: To maintain a permanent audit trail, the **User Id** persists in the system forever. It cannot be modified after creation, and it cannot be reused even if the original user is deleted.

3. **Name & Role:** Enter the user's display name and select their role from the dropdown (including any **Custom Roles** you have created).
4. **Password:** Create and confirm a secure password.
5. Click **Save**.

Updating and Disabling Users

To modify an existing account, click the **Edit** (pencil) icon in the user's row.

 dmsuser1	DMS User 1	User	Active	offline	 
--	------------	------	--------	---------	---

- **Modifiable Fields:** You may update the Name, Role, and Password. Note that the **User Id** remains locked for compliance.
- **Disabling Access:** Change the **Status** to **Disabled** to temporarily revoke all access. This is useful for seasonal staff or during security reviews.
- **Security Authentication:** To save any changes, you must enter your own administrator password in the **Authenticate** field.

Changing Passwords

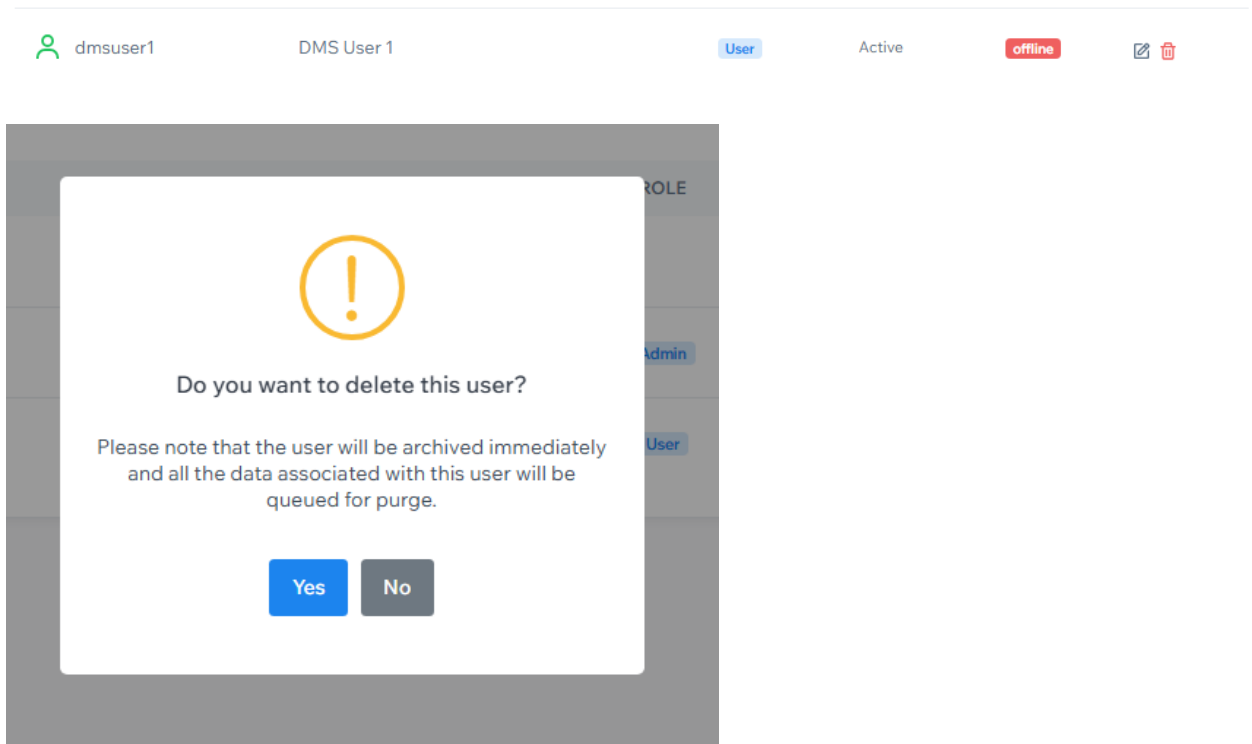
Administrators can reset passwords by clicking the **Update Password** section within the edit dialog. This is particularly helpful if a user is locked out or has forgotten their credentials.

The screenshot shows a modal dialog for updating a user's password. At the top, under the 'Authenticate' header, is a password field with masked characters and an eye icon. Below this is a section titled 'Update Password' with a chevron icon. Inside this section, there are two password fields: 'New Password' (containing the text 'New Password for dmsuser1') and 'Confirm Password' (containing the text 'Confirm New Password'). Both fields have eye icons. At the bottom of the dialog are two buttons: 'Cancel' and 'Save'.

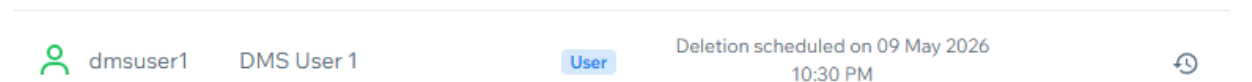
Deleting and Restoring Users

Contuitive DMS utilizes a multi-stage deletion process to protect your data.

1. **Deletion:** Click the **Delete** (red trash) icon. The user is immediately archived and blocked from logging in.



2. **The Purge Window:** All associated data is queued for a **15-day purge**.



3. **Restoration:** If a user was deleted in error, click the **Restore** (blue clock) icon within the 15-day window. This cancels the purge and reactivates the account instantly.

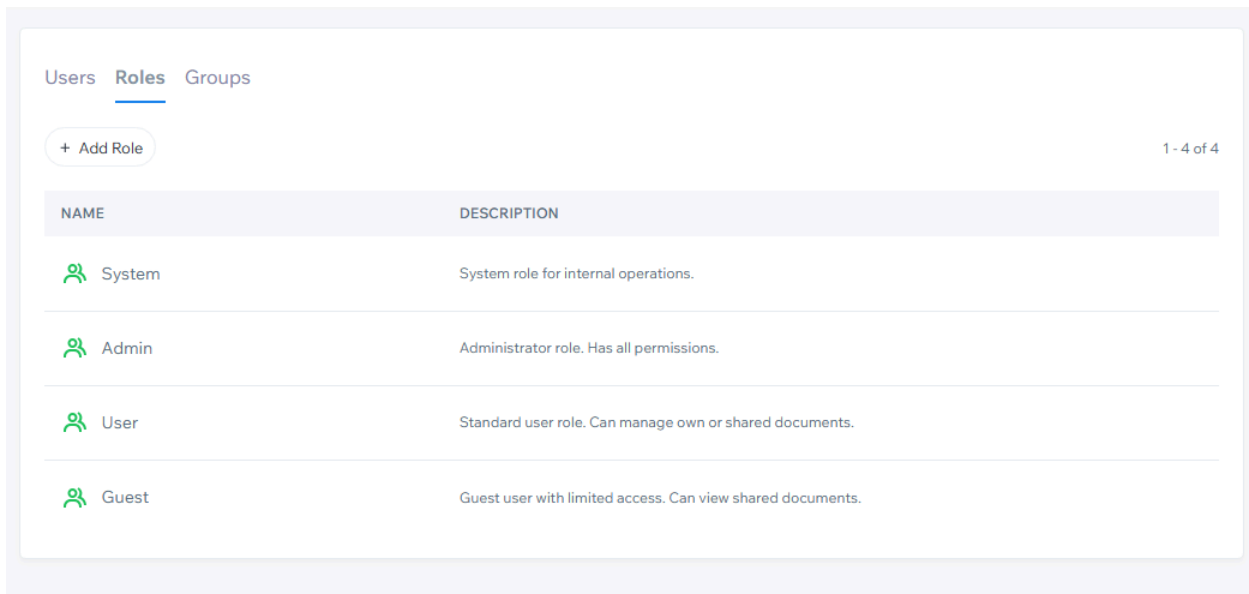
Once the 15-day window expires, the data is permanently removed, though the **User Id** remains reserved in the system's history to maintain the integrity of the audit logs.

Role Management

Contuitive DMS utilizes a granular Role-Based Access Control (RBAC) system. Roles allow administrators to define exactly which resources a user can access and what actions (Create, Update, Delete) they can perform.

Accessing Roles

To manage permissions, navigate to **Admin > Users** and select the **Roles** tab. This view displays all existing roles, their descriptions, and management options.



Inbuilt Roles

The system includes four pre-defined roles that cover standard organizational needs:

Role	Description
System	Reserved for internal system operations.
Admin	Full access to all features, including system settings and licensing.
User	Standard access to manage personal and shared documents.

Guest	Read-only access; can view shared documents but cannot modify any data.
--------------	---

Creating Custom Roles

For organizations with specific compliance or workflow requirements, you can create custom roles with tailored privileges.

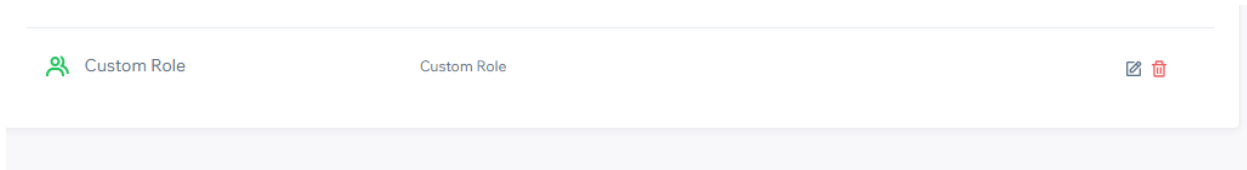
1. Click the **Add Role** button.

2. Enter a **Role Name** and a brief **Description**.
3. **Configure Privileges:** Use the checkbox matrix to assign **Create**, **Update**, and **Delete** permissions for the following categories:
 - **User Management:** Control who can add or modify user accounts.
 - **Role Management:** Control who can define system permissions.
 - **Group Management:** Manage user clusters and departmental access.
 - **Document Management:** Define who can upload, edit, or remove files.
 - **Tag Management:** Manage the organizational metadata used for filtering.
 - **Placeholder Management:** Control system-level document placeholders.
4. Click **Save**.

Modifying and Deleting Roles

Updating a Role

To change the permissions of an existing role, click the **Edit** (pencil) icon. In the **Update Role** dialog, you can rename the role or adjust the privilege checkboxes. Changes take effect for all assigned users immediately upon saving.



Deleting a Role

To remove a role, click the **Delete** (red trash) icon and confirm the action.

Security Safeguard: When a role is deleted, any users currently assigned to that role are automatically reassigned to the **Guest** role. This ensures that users do not retain elevated permissions and are moved to a "safe," read-only state.

Administrative Restrictions

To maintain system stability and security, certain high-level resources are excluded from the custom role matrix:

- **License Management**
- **System Settings**

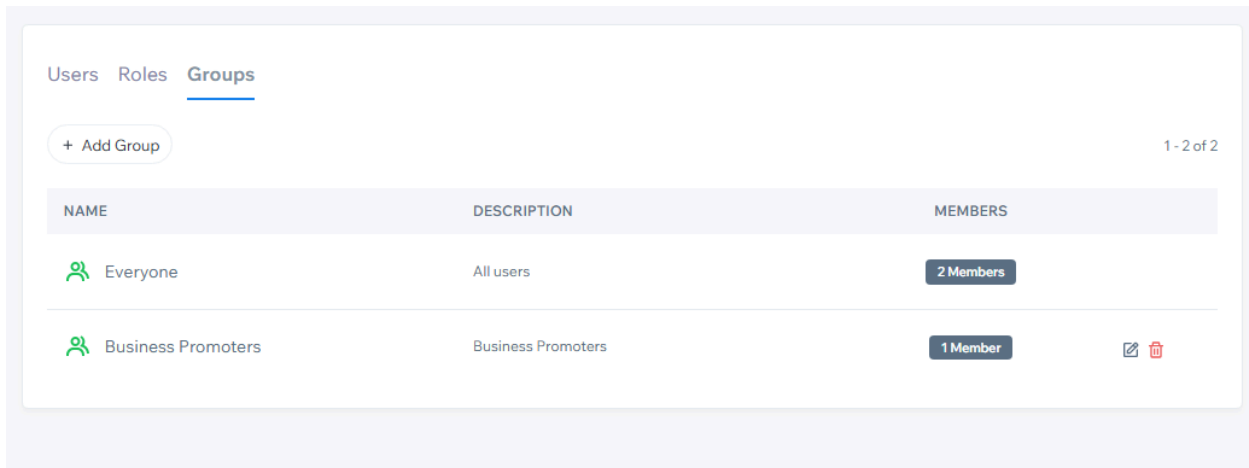
Access to these resources is strictly reserved for users with the **Admin** role to prevent accidental misconfiguration of the server or licensing status.

Groups Management

Contuitive DMS allows you to organize users into groups to streamline collaboration. The primary purpose of groups is to simplify document sharing by allowing you to grant access to multiple users simultaneously rather than individually.

Accessing Groups

To manage your organization's groups, navigate to the **Admin** section in the left sidebar, click on **Users**, and select the **Groups** tab.



The "Everyone" Group

Contuitive DMS includes a built-in special group named **Everyone**. This group automatically includes every user registered in the system. Sharing a document with this group ensures it is accessible to all current and future users.

Managing Groups

Creating a New Group

1. Click the **+ Add Group** button.

2. In the **Add Group** dialog:

← Add Group

Name

Business Team

Description

Business Team Members

Members

Search users...

Admin	☐
dms_admin	☒
DMS User 1 (dmsuser1)	☒

Cancel Save

- **Group Name:** Enter a unique and identifiable name (e.g., "Finance Team" or "Project Alpha").
 - **Description:** Provide a brief overview of the group's purpose.
3. **Member Selection:** You will see a list of all available users. Check the checkboxes next to the users you wish to include in this group.
 4. Click **Save**.

Updating a Group

To modify a group's details or membership:

1. Locate the group in the list and click the **Edit** (pencil) icon.

NAME	DESCRIPTION	MEMBERS	
 Business Team	Business Team Members	2 Members	 

2. In the **Update Group** dialog, you can change the name, description, or toggle member checkboxes to add or remove users.
3. Click **Save** to apply the changes.

Deleting a Group

1. Click the **Delete** (red trash) icon in the row of the group you wish to remove.
2. Confirm the deletion in the prompt.
3. **Note:** Deleting a group does not delete the individual user accounts; it only removes the grouping used for sharing and permissions.

Future Workflows

While currently focused on efficient document sharing, the Group's infrastructure in Contuitive DMS is designed to support more complex automated workflows and permission hierarchies in future updates.

Settings

The **Settings** view allows you to customize the behavior of Contuitive DMS and integrate AI capabilities into your document workflows. To manage these configurations, navigate to the **Settings** tab in the left side pane.

General Settings

General settings define the core operational logic of the system, from data retention to AI-driven feature assignments.

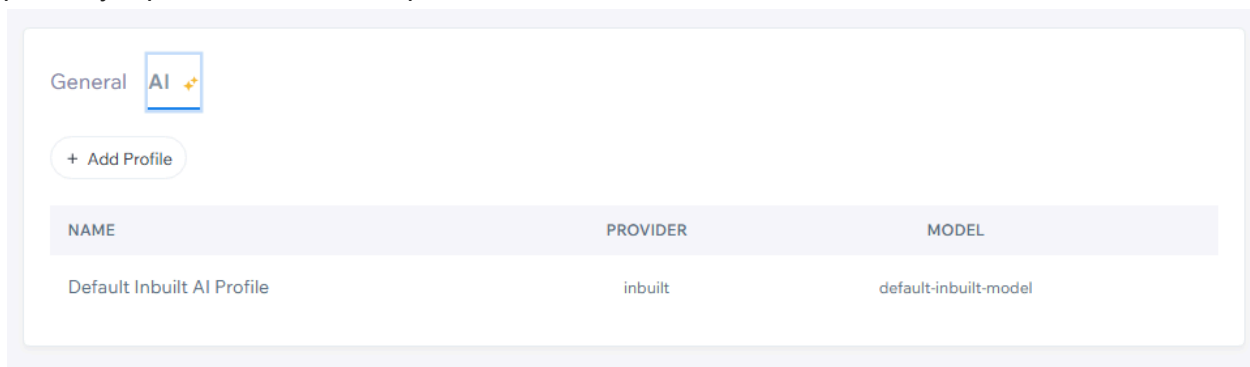
The screenshot displays the Contuitive DMS Settings interface. On the left is a sidebar with the Contuitive logo and navigation links: Dashboard, EXPLORE (Documents, Photos, Power Tags, Placeholders, Archived, Trash), ADMIN (Users, Settings, License), and a user profile for dms_admin. The main content area is titled 'General' and contains three sections: Document Retention (set to 15 days), Summarization (set to None), and Image Recognition (set to Default Inbuilt AI Profile). Each section has an 'Edit' icon. At the bottom right, it says '© 2026 Contuitive Software'.

- **Document Retention:**
 - Determines the number of days a document remains in the **Trash** before being permanently purged.
 - **Default:** 15 days.
 - **Manual Control:** Users can manually empty the trash or permanently delete specific files at any time.
 - **Configuration:** Click **Edit** to update the retention period. The countdown begins the moment a document is deleted.
- **Summarization:**

- Enables single-click document summaries for quick reference. Contuitive DMS follows a **"Bring Your Own AI"** philosophy, ensuring your data remains under your control. Once an AI profile is configured (see AI Settings), select it here to power your summarization workflows.
 - **Image Recognition:**
 - Harnesses AI to generate smart captions for uploaded images. This enables context-aware and natural language searching within your photo and image library.
 - **Data Extraction:**
 - Transforms Contuitive DMS into a structured data management solution. For example, it can extract names, phone numbers, and addresses from visiting cards into organized fields. Extracted data can be utilized in custom workflows or exported in **CSV format**. Select your preferred AI profile to automate this extraction. (More details in "Power Tags" section)
-

AI Settings

Contuitive DMS is a flexible, AI-pluggable system designed for your "Freedom and Data Privacy". By supporting both cloud-based and local models, it ensures that your document journey remains private yet powerful and future-proof.



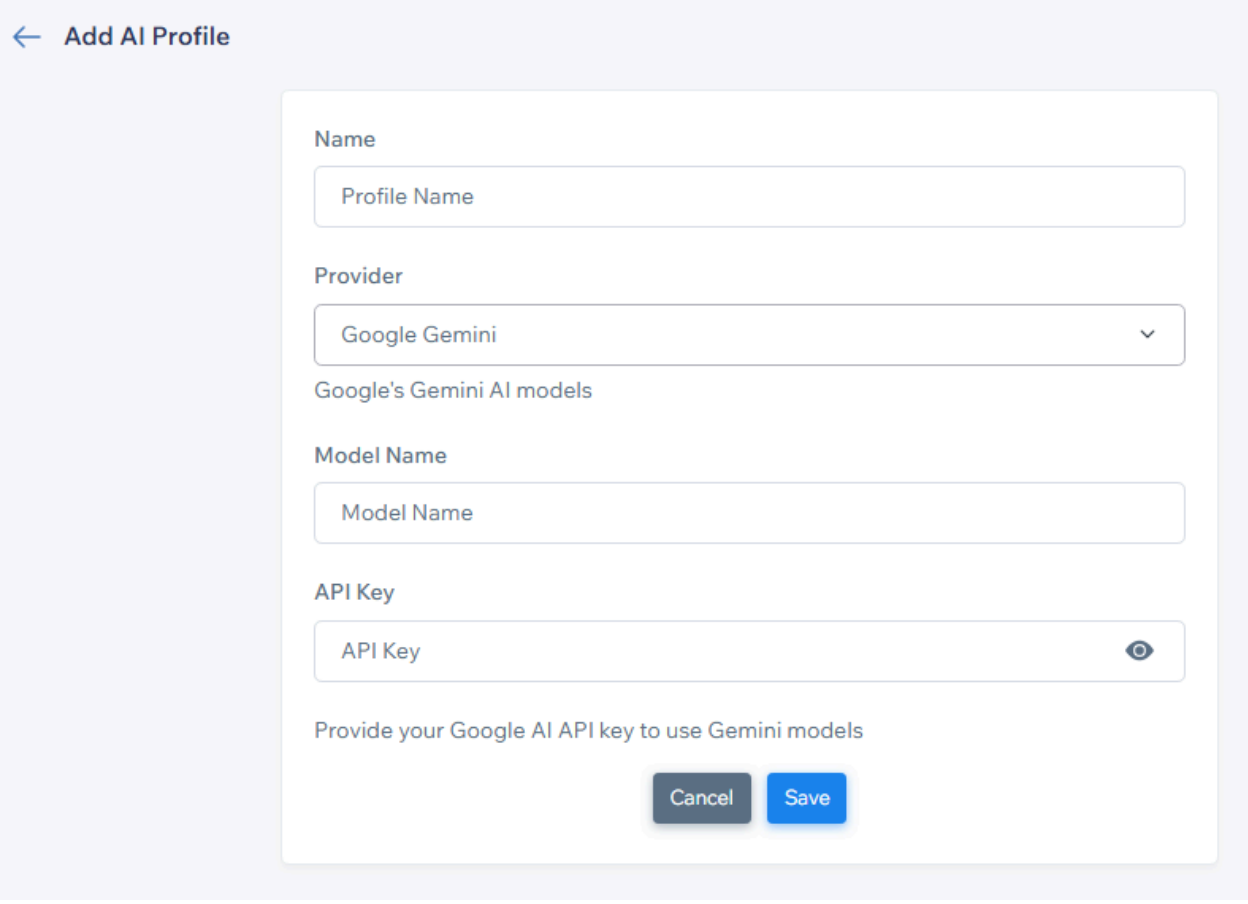
Supported Providers

- **Cloud Services:** Integration with **OpenAI**, **Google Gemini**, and **Anthropic Claude**.
- **Local Models:** Integration with **Ollama**, allowing you to run models locally on your own hardware for maximum data sovereignty.

Managing AI Profiles

All configured AI services are listed under the **AI** settings tab.

1. Creating a Profile: Click **Add Profile**.

A screenshot of a web application interface for adding a new AI profile. The form is titled 'Add AI Profile' with a back arrow icon. It contains several input fields: 'Name' with a placeholder 'Profile Name', 'Provider' with a dropdown menu showing 'Google Gemini', 'Model Name' with a placeholder 'Model Name', and 'API Key' with a placeholder 'API Key' and a toggle icon. Below the 'API Key' field is a text label 'Provide your Google AI API key to use Gemini models'. At the bottom right are 'Cancel' and 'Save' buttons.

← Add AI Profile

Name

Profile Name

Provider

Google Gemini

Google's Gemini AI models

Model Name

Model Name

API Key

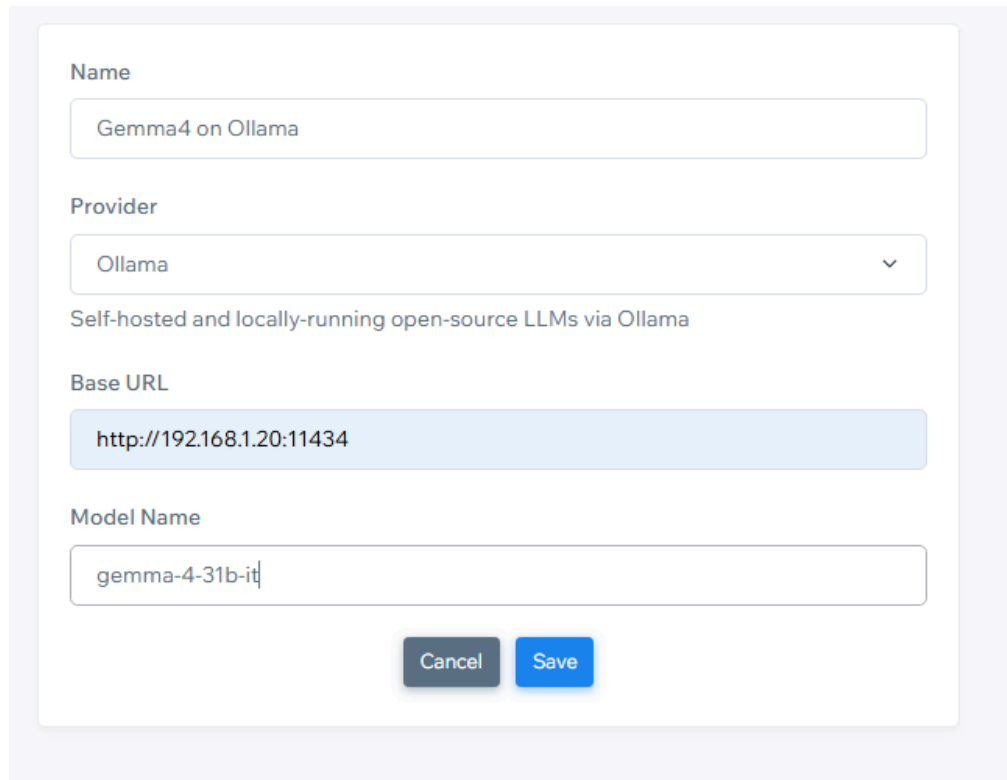
API Key

Provide your Google AI API key to use Gemini models

Cancel Save

- **Name:** Give the profile a descriptive title (e.g., "Fast Summarizer").
- **Provider:** Select the provider (e.g., OpenAI, Ollama).
- **Cloud Config:** Provide the specific **Model Name** (e.g., gpt-4o) and your **API Key** obtained from the provider.

- **Local (Ollama) Config:** Provide the **Base URL** and the **Model Name** as configured on your local server.

A screenshot of a configuration form for a local Ollama setup. The form is titled 'Name' and contains a text input field with the value 'Gemma4 on Ollama'. Below this is a 'Provider' dropdown menu with 'Ollama' selected. Under the dropdown, there is a subtitle 'Self-hosted and locally-running open-source LLMs via Ollama'. The next field is 'Base URL' with a text input field containing 'http://192.168.1.20:11434'. Below that is the 'Model Name' field with a text input field containing 'gemma-4-31b-it'. At the bottom of the form are two buttons: 'Cancel' and 'Save'.

2. **Updating a Profile:** Click the **Edit** icon on any profile row to modify the API keys, model names, or provider settings.
3. **Deleting a Profile:** Click the **Delete** icon to remove a profile.

Recommendation: Choosing the Right Model

AI service providers offer a vast array of models with varying capabilities. For optimal results, it is recommended to choose models specifically optimized for your intended task:

- **High-reasoning models** for complex Data Extraction.
- **Vision-capable models** for Image Recognition.
- **Fast/efficient models** for Summarization.

Using an inappropriate model may result in low-quality output or errors. Always refer to the official documentation of your chosen AI provider for model-specific strengths.