

Photo / Document Management System

PMS (app name: DMS)

User Manual

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1 Getting Started

1.1 System Requirements

Item	Requirement
Operating System	Windows 10 / 11 (64-bit) or macOS 12 or later
RAM	4 GB minimum, 8 GB recommended (8 GB+ recommended if you enable face recognition)
Disk Space	About 150-250 MB for the app itself; roughly another 200 MB if you install the optional face-recognition component; plus space for your documents
Display	1280 x 720 or larger
Internet	Not required for day-to-day use (runs fully offline). Only needed for GPS address lookup, face recognition setup, sending email, or remote upload.

1.2 Download & Install

The installer is named DMS (the app's internal name; the product name shown in the interface is "Photo Management System / PMS"). Follow the steps for your platform.

Windows

1. Receive or download the file DMS.zip from your contact (e.g. email, WeChat, USB drive).
2. Right-click DMS.zip and choose Extract All...
3. Choose a destination folder, for example C:\DMS, and click Extract.
4. Open the extracted folder and find the file DMS.exe.
5. Double-click DMS.exe to launch the application.

Note: Windows may show a SmartScreen warning the first time you run DMS.exe. Click More info, then Run anyway. This appears because the file is not commercially code-signed; the program itself is safe. If instead the app doesn't respond at all when you double-click it, see section 1.4 - the file is most likely blocked, not broken.

Mac

6. Receive DMS.app (or a .zip file containing it), unzip it, and drag it into your Applications folder (or anywhere you like).
7. Double-click DMS.app to launch it.
8. The first time you open it, macOS may say "cannot verify the developer." Go to System Settings -> Privacy & Security, find the notice there, and click Open Anyway.

Tip: No other software needs to be installed (except the optional face-recognition component, see section 10). DMS bundles its own copy of Python and every library it needs.

1.3 First Launch: Choosing a Project

Double-clicking DMS.app (Mac) or DMS.exe (Windows) first shows a small “Choose a project” window, before the main interface loads:

9. Continue with last project - reopens whichever project you were using the last time you quit normally (DMS remembers the path automatically on every normal quit). This button is greyed out the first time you use DMS, or if that project can no longer be found.
10. Select a project... - opens a system folder picker so you can choose any existing DMS project folder on your computer.
11. New project... - creates a brand-new, empty project folder and switches to it immediately (unlike older versions, DMS no longer opens with pre-loaded demo data).

Once a project is chosen, DMS starts its built-in web server on your computer (searching for a free port starting at 8765) and opens your default browser to that address, loading the main PMS interface.

Tip: Need to work on two different projects at the same time? You don't have to close the first one - see chapter 16, “Working with Multiple Projects at Once.”

1.4 Windows Blocked This App? Unblock It

A DMS.zip / DMS.exe you received over the network (email, WeChat, a cloud-drive link, etc.) gets automatically tagged by Windows as “downloaded from another computer,” which can cause repeated security prompts, or simply no response at all when you double-click the file. The first time you use a given copy of the app, unblock it as follows (this is a one-time step per download - a newly downloaded version may need it again):

12. If a security warning appears when you launch DMS.exe (or double-clicking it does nothing for a long time)...
13. Right-click DMS.exe.
14. Choose Properties from the right-click menu.
15. At the bottom of the General tab, under Security, check the Unblock checkbox.
16. Click Apply.
17. Click OK to close the window.

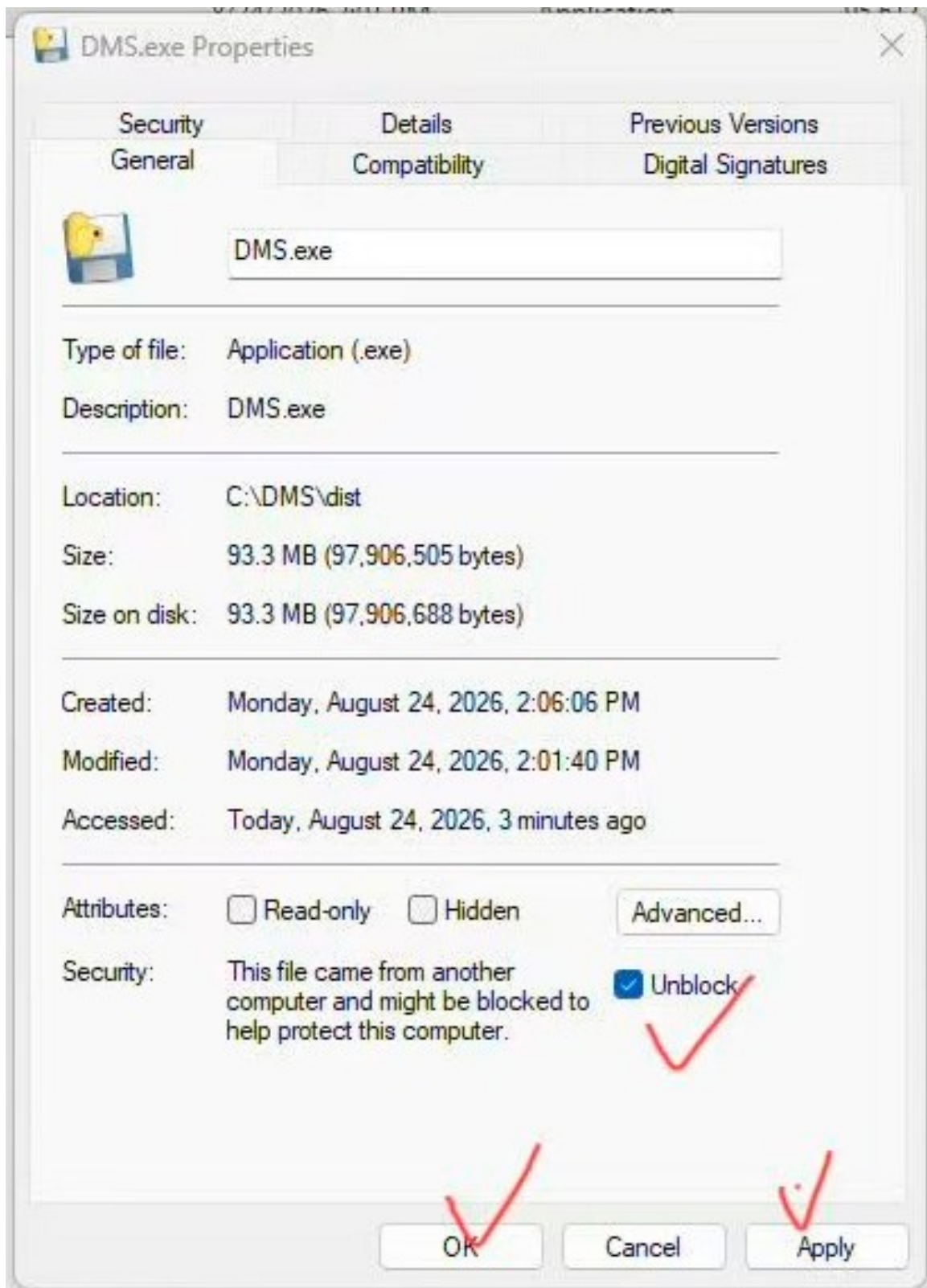


Figure 1-1 DMS.exe Properties window: check "Unblock," then click "Apply," then "OK"

Note: This is the same underlying Windows security mechanism as the SmartScreen “Run anyway” prompt in section 1.2, showing up at a different point - unblocking the file here usually makes both go away. If “Open in native app” (section 4.5) reports a document as locked/read-only, it’s the same cause; DMS automatically tries to unlock the file first, so you normally won’t need to handle this by hand.

2 Understanding the Interface

2.1 Main Layout Overview

The DMS window is divided into three main areas:

Area	Location	Purpose
Header Bar	Top of the page	Storage path, total indexed document count, the Project menu, and the logout button.
Sidebar	Left panel	Four tabs: Tree, Search, Databook, and Faces.
Main Content Panel	Right / centre area	Shows the documents in the currently selected folder, or the content of whichever sidebar tab is active.

Tip: Drag the vertical divider between the sidebar and the content panel to resize either side. Double-click the divider to reset to the default width.

Tip: The storage path shown in the middle of the header bar is itself a button - click it anytime to open a Change storage location dialog and point DMS at a different folder on your computer, no restart and no need to go back through the section 1.3 startup screen (see section 1.3 for the first-time setup).

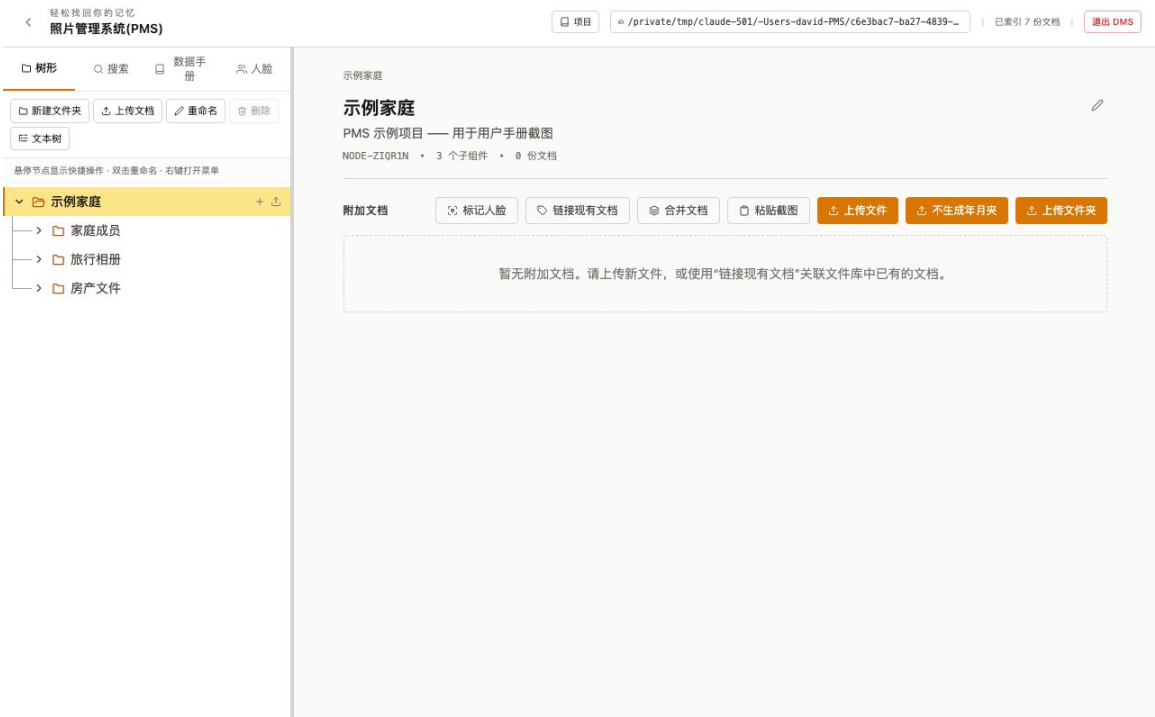


Figure 2-1 Overall layout: folder tree on the left, folder details and action buttons on the right

Tip: Almost every text field in the app (folder/document names, serial numbers, login credentials, descriptions, the search box, the Ask-AI question box, and more) has a small microphone icon next to it - click it, speak, and the recognized text is appended at the cursor; click again to stop. You can switch the recognition language between Chinese and English, and it needs no AI key at all - it runs on your browser's own built-in speech recognition (Chrome / Edge recommended).

2.2 Sidebar Tabs

Tab	Chinese Label	What It Does
Tree	树形	Browse and manage your folder hierarchy. This is the primary navigation view.
Search	搜索	Full-text and metadata search across all documents.
Databook	数据手册	Select documents and generate a professional combined PDF or Word document (see chapter 8).
Faces	人脸	Face recognition and browsing photos by person (requires an optional component - chapter 10).

2.3 Main Content Panel

When you click a folder in the Tree tab, the right panel shows:

- Folder name, serial number (SN), description, and saved login credentials (if any) at the top.
- Action buttons: Tag Faces, Link Existing Document, Merge Documents, Paste Screenshot, Upload Files, Upload (no year/month folders), Upload Folder.
- A card for each document in the folder, showing file name, size, type icon, upload date, and action icons (SN, link, send to phone, email, delete).

3 Managing Folders (Tree)

DMS organizes your documents into a tree of folders, similar to a file explorer, with extra features: serial numbers, descriptions, login credentials, and document counts.

3.1 Creating Folders

18. Click a folder in the tree to select it (the new folder will be created as a child of the selected folder).
19. Click New Folder in the sidebar toolbar, or right-click the selected folder and choose New Folder.
20. A text field appears. Type the folder name and press Enter to confirm, or press Escape to cancel.

Tip: Folders can be nested to any depth - there is no limit.

3.2 Renaming and Deleting Folders

Rename:

- Double-click the folder name, or right-click and choose Rename.
- Edit the name and press Enter to save.

Delete:

- Right-click the folder, choose Delete, and confirm.
- Documents inside are not removed from disk immediately - they move into a hidden holding folder named “Not Show in Tree” (a soft-delete / recycle-bin mechanism).
- To recover them, find the “Not Show in Tree” node in the tree and re-link or move the documents elsewhere.

Note: Only deleting a document directly inside the “Not Show in Tree” folder permanently removes the file from disk - that action cannot be undone. This is a different folder from the “Not Shown in The Tree” archive folder mentioned in section 12.4 for old .dms backups: the former lives inside the document tree and holds soft-deleted documents; the latter lives at the root of the storage folder and holds backup files beyond the retention limit.

3.3 Reordering and Moving Folders

Reorder siblings (folders at the same level):

- Hover over a folder to reveal up/down arrow buttons.
- Click the up arrow to move it up, the down arrow to move it down.

Move to a different parent:

- Click and drag the folder, dropping it onto the target parent folder (highlighted while dragging).

- You can also drop it directly above or below another folder to place it before or after that folder.

3.4 Serial Numbers (SN)

Every folder can have an optional Serial Number (SN) used to tag assemblies, batches, or project identifiers.

- Click the pencil icon on a folder to enter edit mode.
- Enter a value in the Serial Number field (e.g. INS-2026-001).
- The SN is shown next to the folder name in the tree.

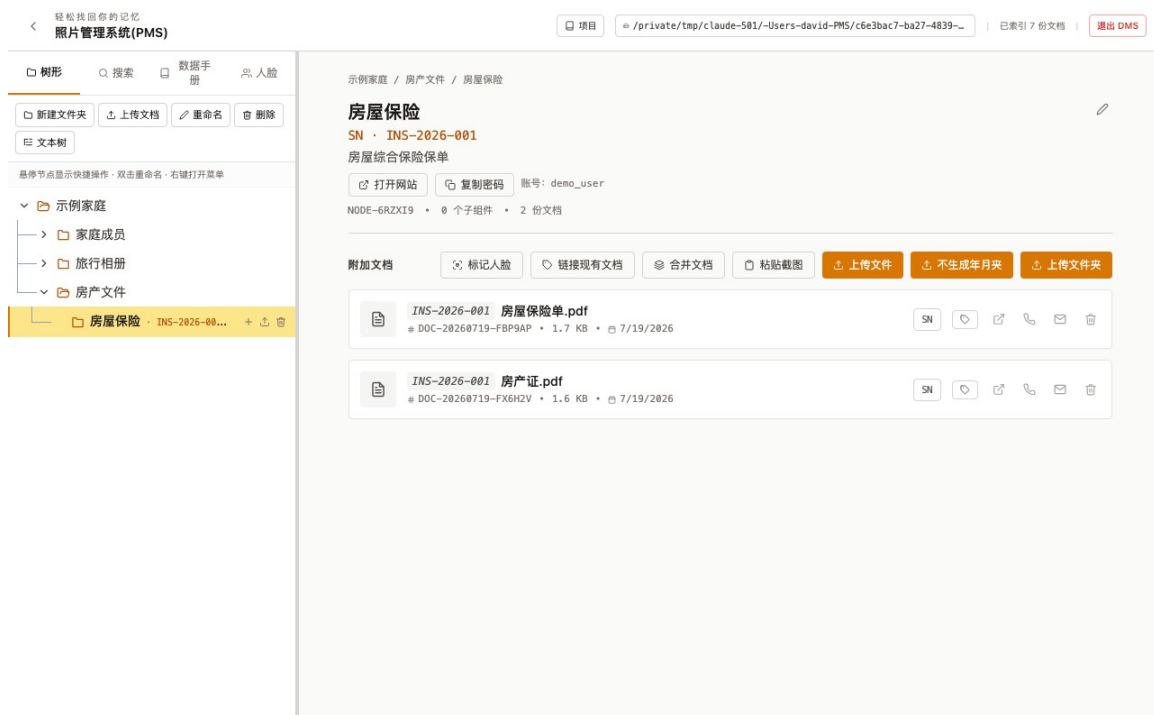


Figure 3-1 A folder with a serial number (Homeowner's Insurance - INS-2026-001)

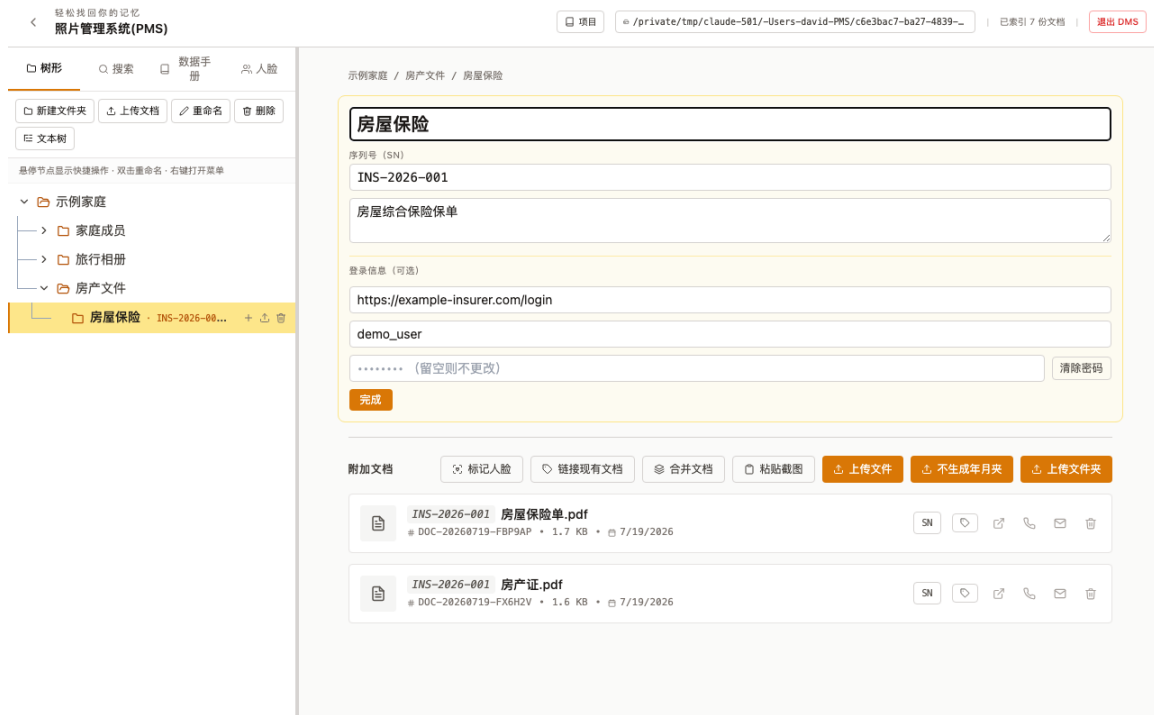


Figure 3-2 Folder edit mode: name, serial number, and login-credential fields

3.5 Description: Voice Input, AI Cleanup, and PDF Export

Every folder (and every document) has its own Description area - not just a one-line note, but a full writing and organizing toolkit: voice dictation, transcribing an uploaded recording, AI cleanup/polish, a Chinese typo checker, and finally one-click export to a PDF that keeps updating in place. What started as a plain text box for folders has been upgraded to the exact same full-featured panel single documents already had.

- Voice Input - click it and speak into your microphone; the recognized text is appended to the end of the description automatically. Switch between Chinese and English recognition. This runs in the browser and needs no AI configured.
- Transcribe an uploaded recording - pick an audio file (e.g. a voice memo from your phone: .m4a, also .mp3/.wav/.aac, etc.), and AI (Gemini) transcribes it and appends the text - a second way to get text in, alongside live dictation, especially useful when you recorded on your phone earlier and want to process it later. Requires a Gemini API key the first time (see below).
- AI Cleanup - choose from “Organize / Polish wording / Make concise,” then click Clean up with AI; the AI turns spoken or rough notes into readable prose while preserving all the information. The result is shown as a preview first - it only replaces your text once you click Apply, never silently.
- Check for Typos - has AI check the description for typos, punctuation, and misused idioms (Chinese text); apply fixes one at a time or all at once.

- Save & Make Searchable - saves the current description into the index so it can be found later by search.
- Save as New Document / Update Description Document - saves the description as a .txt document in the same folder; on later saves the button becomes “Update Description Document” and overwrites the same file instead of piling up copies.
- Save as PDF / Update PDF - turns the description into a properly formatted PDF, also stored in the same folder; editing the description and clicking again updates that same PDF (same filename) rather than creating a new one each time - handy as a document you can print or share at any point.

示例项目 / 宝宝出生

宝宝出生

2026年3月15日凌晨，妻子突然临产，我们立刻赶往市第一妇幼保健院。接诊医生是王主任，助产士是李护士长。凌晨3点42分，宝宝出生了，3.4公斤，哭声很响亮。第一次抱到她的那一刻，所有的紧张都变成了眼泪。

NODE-BABY • 0 个子组件 • 0 份文档

描述 已索引

中文 EN 语音输入 上传录音转文字

AI 整理 整理结构 用 AI 整理润色 检查错别字 Gemini

2026年3月15日凌晨，妻子突然临产，我们立刻赶往市第一妇幼保健院。接诊医生是王主任，助产士是李护士长。凌晨3点42分，宝宝出生了，3.4公斤，哭声很响亮。第一次抱到她的那一刻，所有的紧张都变成了眼泪。

保存并可搜索 另存为新文档 保存为 PDF

Figure 3-3 A folder's description panel (example: a “Baby's Birth” folder)

Tip: Scenario 1 - a baby-book folder: create a “Baby's Birth” folder and write the whole story in the description - what time you rushed to the hospital, the hospital and doctor's names, how it felt holding the baby for the first time... then add the birth certificate, footprint card, and ultrasound scans as documents in the same folder. That one narrative turns a handful of scattered documents and photos into a complete keepsake.

Tip: Scenario 2 - voice-logging routine measurements: after taking a blood-pressure or blood-sugar reading, just say the result out loud into a voice-memo app on your phone - record as many times as you measure, saved on the phone for now. When convenient, transfer those recordings to your computer (AirDrop, WeChat file transfer, a cable, whatever works), open the description panel for the relevant folder or document, and click Transcribe Recording once per file; they're

transcribed and appended in turn. Finish with one click of Clean up with AI (choose “Organize”) to turn several loose readings into one properly organized record, then Save as PDF to keep it.

Note: Transcribing a recording, AI cleanup, and the typo checker all need a Gemini API key configured first: until then, a “Configure AI (Gemini)” link appears in their place - click it, paste your key when prompted, and save (the key is stored only on this machine, encrypted). Voice Input (live microphone recognition) needs no key at all and works immediately.

3.6 Login Credentials (can save multiple sets)

If a folder corresponds to a website or online account that requires signing in (an insurance company's customer portal, a hospital patient portal, and so on), you can save that site's login details directly on the folder for quick access later. A folder is no longer limited to one set of credentials - add as many sets as you need, for example a “dealer portal” and a separate “manufacturer parts portal” for the same piece of equipment.

21. Click the pencil icon on the folder to enter edit mode.
22. In the Login Credentials (optional, multiple sets allowed) area, fill in: website link, account/username, and password.
23. Need to save another set? Click Add Login Credentials to add another group of the same three fields; each group has an X button to delete it.
24. Click Done to save.

Figure 3-4 Edit mode with two login-credential sets added (the microphone icon next to each field lets you dictate it - see section 2.1)

In view mode, each credential set shows its own three buttons, with the account name visible directly so you can tell the sets apart without decrypting anything:

- Open Website - opens the site in a new tab and automatically copies the account name to the clipboard, ready to paste into the username field.
- Copy Account - copies the username to the clipboard in one click, instead of selecting text out of a masked field.
- Copy Password - copies the password to the clipboard, ready to paste into the password field.

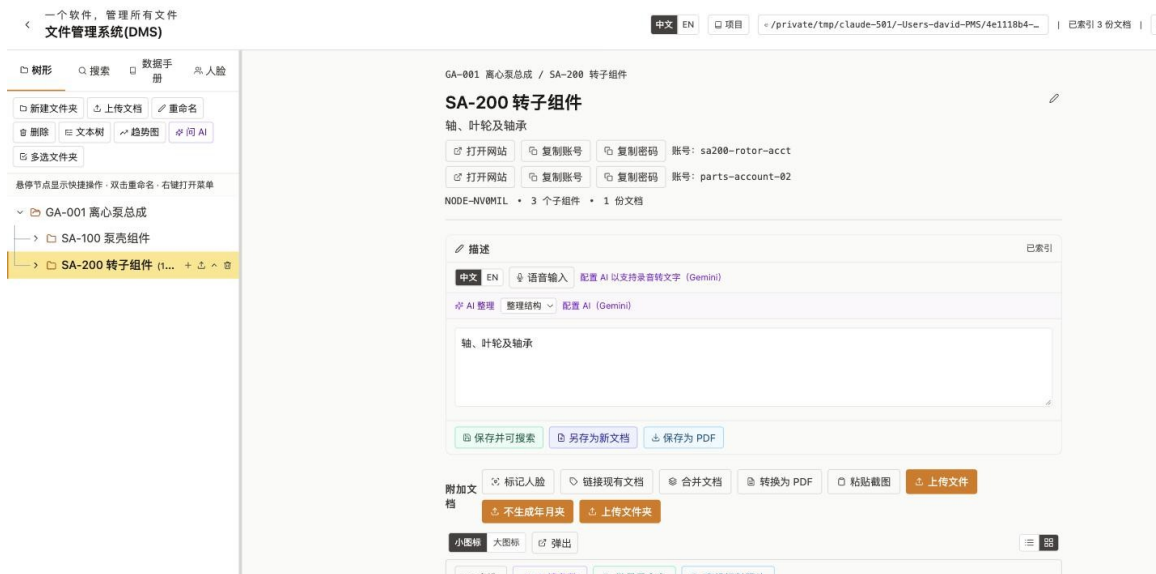


Figure 3-5 View mode with two login-credential sets shown side by side

Note: For security, passwords are stored encrypted on the server (the key lives in your local user directory and is not synced along with the storage folder), and are only decrypted briefly when you click Open Website, Copy Account, or Copy Password - never sent along with ordinary folder-tree reads. Because passwords can otherwise be read by other devices on the same local network when no access password is set, we strongly recommend setting the access password described in chapter 14 before relying on this feature.

3.7 Text Tree Preview

If you need to copy or export the entire folder structure as plain text (for example, to paste into a chat app or a document), use the text tree feature.

25. Click the Text Tree button at the top-left of the Tree tab.
26. The preview window shows the folder hierarchy of the currently selected folder (the selected folder is the root, including all its subfolders) as an ASCII tree. Select a different folder in the tree first, then open Text Tree, to see that folder's structure.

27. Check Show Serial Numbers to append each folder's SN and document count next to its name.
28. Click Copy to copy the text to the clipboard, or Export .txt to save it as a text file.

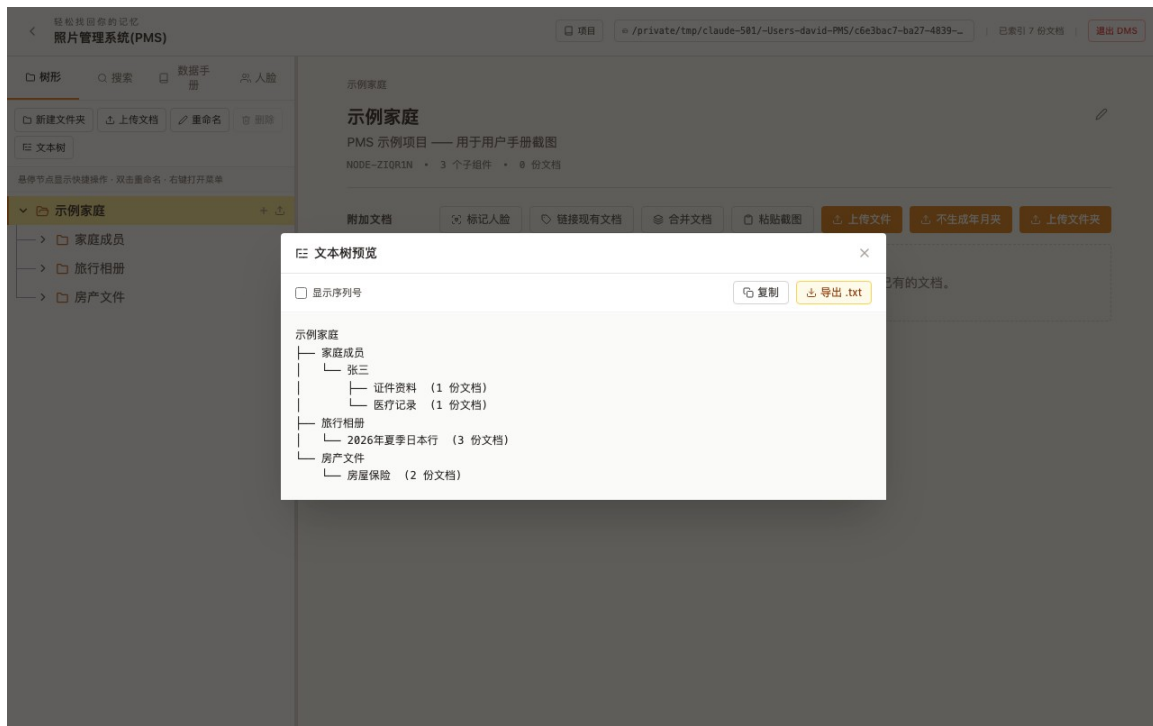


Figure 3-6 Text tree preview window

3.8 Batch Folder Operations (Multi-select)

Need to delete or export several folders at once? You no longer have to do it one at a time.

29. Click Multi-select Folders at the top-left of the Tree tab.
30. The toolbar switches to multi-select mode, and a checkbox appears in front of every folder name.
31. Check the folders you want to act on (you can check folders across different levels and different parents).
32. Click Download to export the checked folders individually, or Delete to soft-delete them all at once (moved into “Not Show in Tree” - see section 3.2).
33. Click Cancel Multi-select to exit the mode.

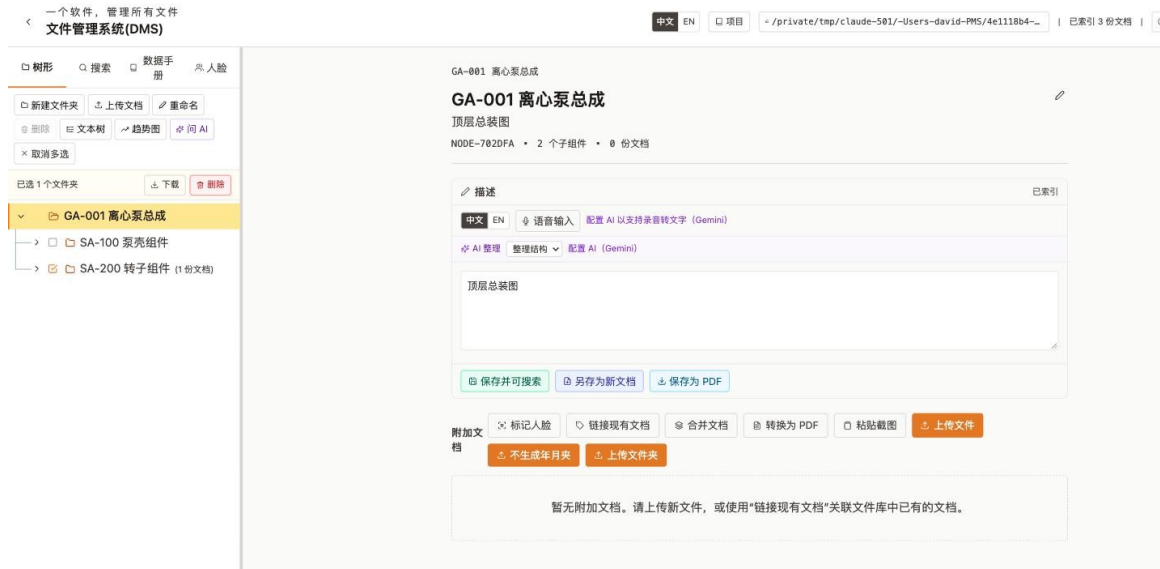


Figure 3-7 Folder multi-select mode: one folder checked, ready to batch-download or batch-delete

3.9 Setting a Photo Root Folder

Section 4.1 explains that uploading a photo automatically creates “year/month” subfolders under the current folder. If you’d rather have every photo in the whole project archived by year/month under one fixed location - instead of scattered under whichever folder you happened to upload into - you can designate a “photo root” folder:

34. Right-click the folder you want to use as the root, and choose Set as photo root folder.
35. That folder gets a small camera-icon marker in the tree.
36. From then on, uploading a photo anywhere in the tree (as long as you’re not using the “current folder” upload mode) creates its year/month subfolders under this designated root, not under whatever folder you uploaded into.
37. To undo it, right-click the marked folder and choose Unset photo root folder.



Figure 3-8 Folder right-click menu: Set/Unset photo root folder

Tip: Handy for funneling every photo from every device and every folder into one central “Photo Library” folder organized by year/month, while each business folder keeps only the documents relevant to it, unmixed with photos.

3.10 Pasting Screenshots Directly into a Description

Folder and document Description boxes now accept pasted images: take a screenshot (or copy an image), click into any Description box, and press Ctrl+V (Cmd+V on a Mac). The screenshot appears inline at the cursor, mixed in with your text.

- The pasted screenshot is saved as a real image document in the current folder (it shows up in the document list like any upload, and deleting it sends it to Deleted Files where it can be recovered); the description just references it.
- Pasting into a Description does not also trigger the “paste a screenshot as a new document” behavior from section 4.3 - the two don't interfere. Pasting anything else (e.g. formatted text copied from a web page) keeps the plain text only, without its original formatting.
- AI Polish and Check Typos only work on the text portion; screenshots already inserted are kept, not lost. When the description is exported as .txt/PDF or shown in search results, each screenshot appears as a “[screenshot]” placeholder.

Note: A description now stores text plus images. Plain-text descriptions saved by older versions keep working and open without any conversion.

3.11 Export Logins

If you have saved website logins in many folders (section 3.6), you can collect all of them into one spreadsheet to review, tidy up or back up separately.

38. Click Export logins in the document toolbar.
 39. DMS builds an Excel spreadsheet and opens it straight in your default spreadsheet program (Excel, LibreOffice, etc.) - it does not go through a browser download.
 40. Each row is one login. The columns are Folder, Website, User name, Password and Folder description. A folder with several saved logins gets one row per login, and folders appear in tree order.
- The Password column is in PLAIN TEXT. The spreadsheet is a temporary file (in a DMS-logins folder inside the system temp directory), so keep it safe or delete it when you are done, and don't forward it.
 - A password shown as “(cannot decrypt - saved on another computer?)” was saved on a different computer and can't be decrypted here; “(lost - please re-enter in DMS)” means the password was lost and must be typed in again in DMS.

4 Working with Documents

4.1 Uploading Files

41. Select the destination folder in the Tree tab.
42. Click Upload Files (default behaviour, see below), or Upload (no year/month folders).
43. In the file picker, select one or more files and click Open.
44. A progress indicator appears at the top of the screen showing how many files are uploading.
45. When complete, the new document cards appear in the panel.

The difference between the two upload buttons:

Button	Behaviour
Upload Files	If a file is recognized as a photo with a readable capture date (EXIF), DMS automatically creates “Year/Month” sub-folders under the current folder and files it there; non-photos, or files with no readable date, go straight into the current folder.
Upload (no year/month folders)	Every file goes straight into the currently selected folder, whether or not it's a photo - no automatic year/month sorting.

Supported file types:

Category	Extensions
Images	JPEG, PNG, GIF, WebP, BMP, TIFF, HEIC
Documents	PDF, DOC, DOCX, XLS, XLSX, PPT, PPTX, TXT, CSV, HTML, JSON, XML
Archives	ZIP

Tip: For photos, DMS automatically reads the capture date and GPS location from EXIF metadata and stores it with the document; the coordinates are reverse-geocoded into a readable place name automatically whenever you're online. Photos with a location can also be split one level further, into place folders inside each month - see section 4.18.

4.2 Uploading a Folder

46. Select the destination folder in the tree.
47. Click Upload Folder - this opens the Upload Multiple Folders dialog.
48. Click + Add Folder and pick a folder on your computer; repeat to queue up several folders at once, each listed above with an × to remove it.
49. Choose one of three upload modes:

- Sort into year/month folders (default) - every file in each picked folder (including its subfolders) is routed by capture/archive date into “year/month” folders, created automatically if they don't exist yet. The original subfolder structure is not kept.
 - Upload files and subfolders as the sources - subfolders inside each picked folder are recreated here exactly as they are, with no date-based year/month folders. Good for material that's already organized the way you want to keep it.
 - Recreate the picked folder under the current folder - unlike the other two modes, the picked folder itself also becomes a new subfolder here (not just its contents); every subfolder under it is rebuilt as-is, files land in their matching folders, and matching directories are created on the local drive too.
50. Optionally type something into Add text to filenames (optional) - it's inserted right after the date when there is one (e.g. 2026-09-17-text-original name), or at the very front of the filename when there isn't. The mic button next to it accepts voice dictation too. Leave it blank to add nothing.

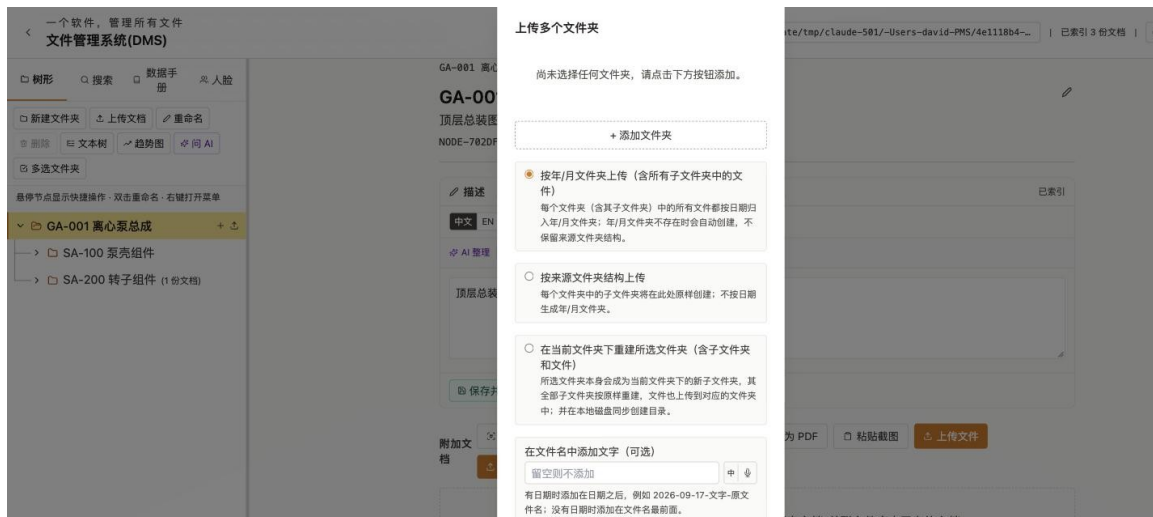


Figure 4-2 The Upload Multiple Folders dialog: the three upload modes and the filename text field

51. Click Upload in the bottom-right corner to finish.

Tip: Mix and match across batches as needed: archive a whole phone-camera-roll folder with Sort into year/month, while a drawing folder that's already organized by project uses Upload as the sources or Recreate the picked folder to keep its structure intact.

4.3 Pasting Screenshots

You don't need to save a file first - a screenshot you just took, or an image copied from elsewhere, can be pasted straight into the current folder.

52. Select the destination folder in the Tree tab.

53. Take a screenshot (or copy an image) to the system clipboard.
54. Click Paste Screenshot, or simply press Ctrl+V (Windows) / Cmd+V (Mac).
55. DMS saves the clipboard image as a PDF and adds it to the current folder.

If the clipboard holds TEXT instead of an image (for example a passage copied from a web page or chat), pasting works too: click Paste Screenshot or press Ctrl+V / Cmd+V and DMS typesets the text into a PDF named “Pasted text <date> <time>.pdf” in the current folder. If the clipboard has neither an image nor text, DMS asks you to take a screenshot or copy something first.

4.4 Linking Existing Documents

The same document can be linked into multiple folders without duplicating the file on disk.

56. Select the folder you want to link the document into.
57. Click Link Existing Document.
58. A dialog lists all documents in the system.
59. Check the document(s) you want and click Add Link.
60. The document now appears in both the original folder and the new folder.

Tip: The Link Existing Document dialog has been upgraded: drag its title bar to move the window and drag the divider between the two columns to resize them; the folder tree on the left has Expand all / Collapse all buttons, so you can open folders and tick the documents to link; on the right, Target folders can be ticked, or you can simply drag a document onto a target folder; and a Delete button permanently deletes the selected documents from disk (this cannot be undone - use with care).

Tip: A faster way: drag a document card onto the target folder in the left-hand tree. Dropping it normally MOVES the document (it leaves its old folder and goes into the target). Hold Alt (Option on a Mac) while dropping to LINK it instead - the document stays in its original folder and also appears in the target, exactly like the steps above without opening the picker. While Alt/Option is held, the target folder highlights blue to show it will be a link, not a move.

4.5 Viewing a Document

61. Click the document name or thumbnail to open the Document Viewer.
 62. The viewer opens as an overlay with the preview as its main content; you can drag its edges to resize it, drag the title bar to move it, or click Pop Out to turn the viewer into its own separate browser window (for example, to drag it to a second monitor). The divider between the preview and the info panel on the right can also be dragged to resize either side.
- Images are shown inline.
 - PDFs open in an embedded viewer with scrolling and zoom.
 - Text files are shown in a readable monospace view.

- Office files (Word, Excel, PowerPoint) offer a Download button to open in your local Office app.
63. The viewer's toolbar has buttons for Add Description, View Map Location, Extract Text (OCR), Extract Key Parameters, Scan Barcode (section 4.8), Ask AI (section 4.9, requires an API key - section 6.4), Download, Pop Out, and Close.
 64. Click Close or press Escape to close the viewer.

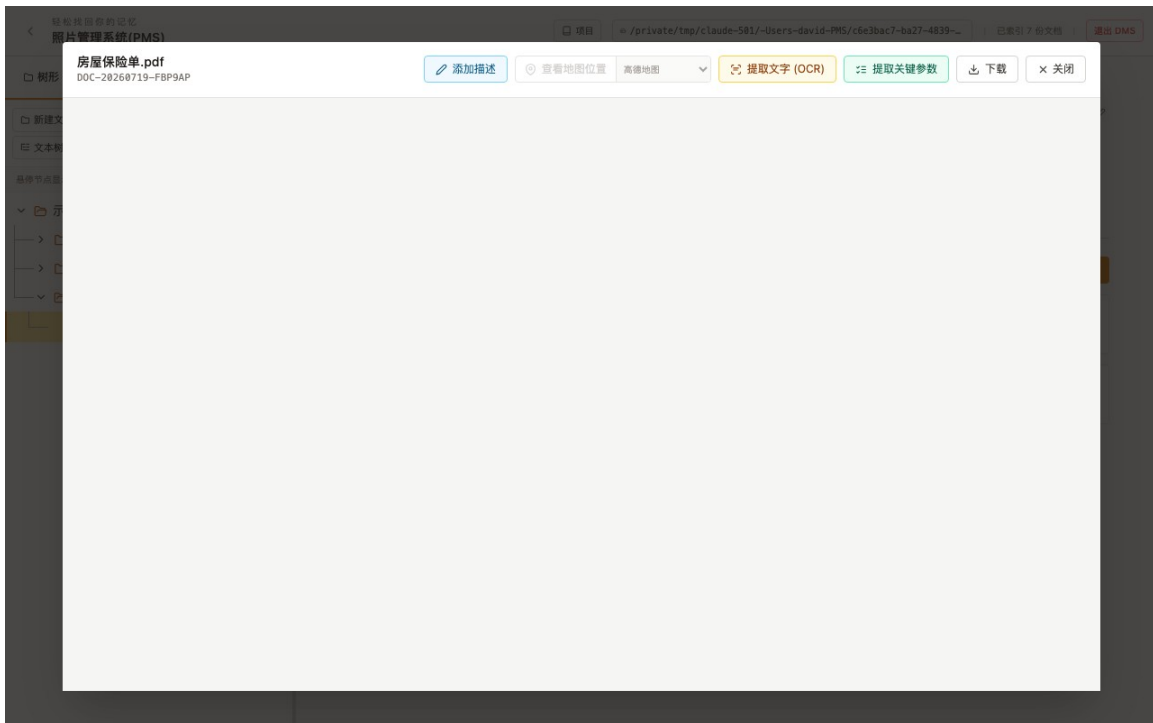


Figure 4-3 The PDF document viewer

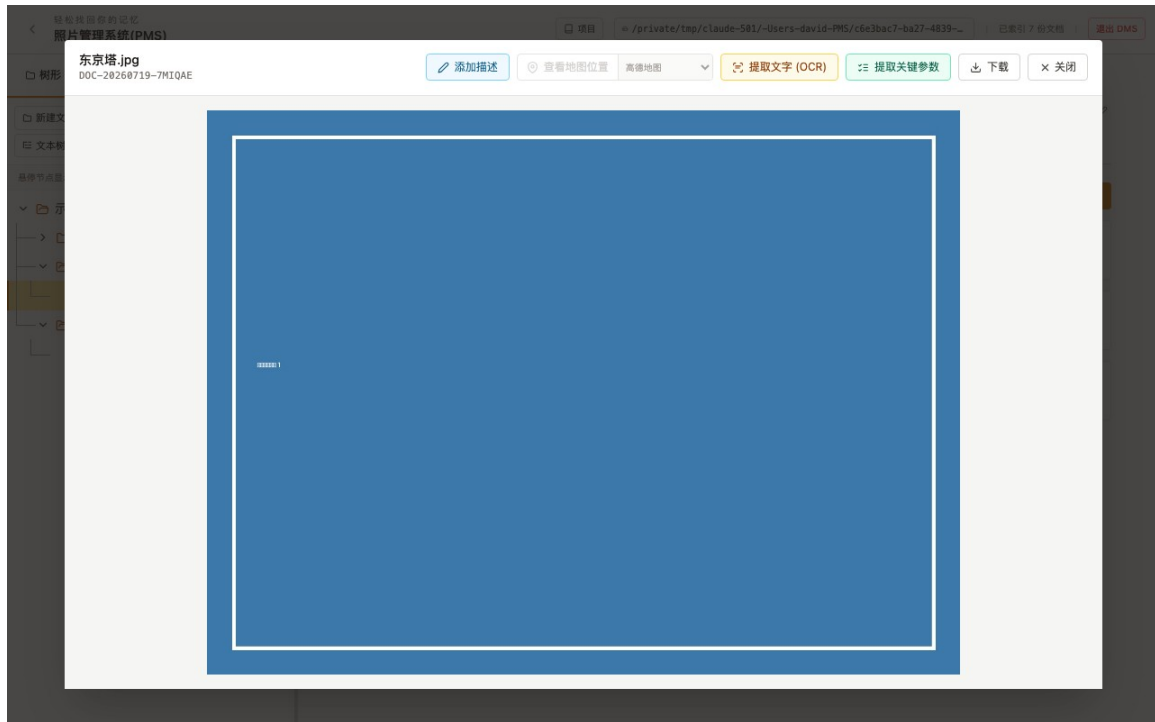


Figure 4-4 The image document viewer

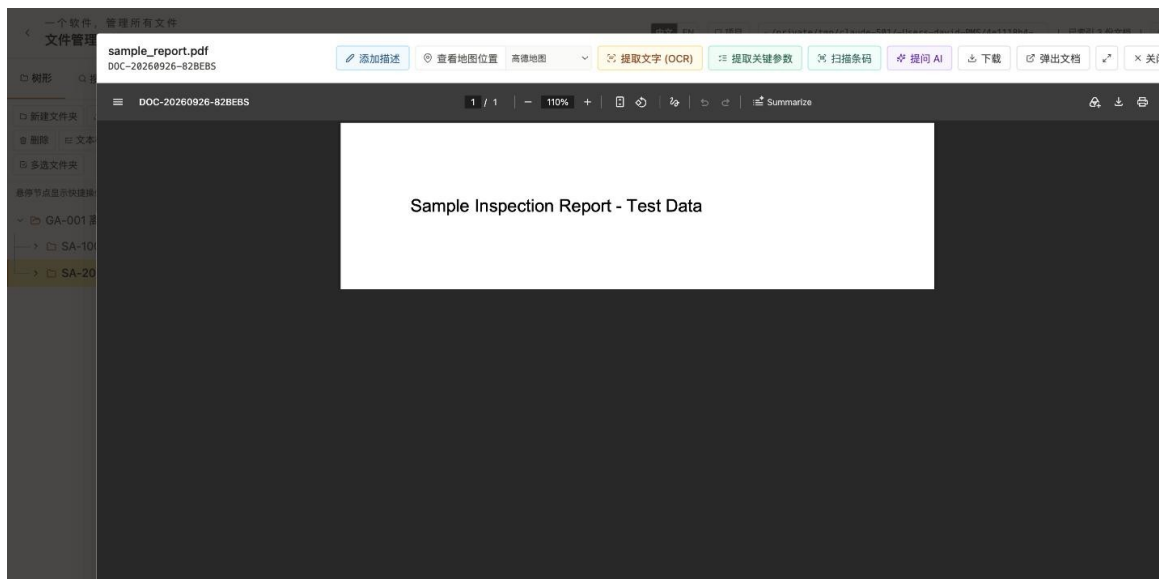


Figure 4-5 The viewer's top toolbar: extract key parameters, scan barcode, ask AI, pop out, and more

Tip: A document you've opened stays highlighted in its folder's list, so when you come back you can immediately spot which one you were just looking at, without hunting for it again.

4.6 Downloading, Sending, and Deleting Documents

Every document card has a row of icons on the right:

Icon	Function
SN	Set a custom serial number for this document specifically (inherits the folder's SN by default).
Link	View / manage which folders reference this document.
Send to phone	Generate a link the document can be opened from on a phone, sent by SMS/iMessage, or copied and shared manually (see section 11.1).
Email	Send the document as an email attachment (requires SMTP setup - section 13.2; on Mac, if SMTP isn't set up, this opens the system Mail app instead).
Delete	Unlink from the current folder and soft-delete (moved to "Not Show in Tree" - see section 3.2).

Download: click the download icon on a document card, or the Download button inside the viewer.

4.7 Duplicate Detection

When you upload a file whose name and size both match an existing document, DMS prompts you to avoid wasting space:

- Skip - don't upload this duplicate file.
- Link only - don't copy the file; just link the existing document into the current folder (recommended - has the same effect as section 4.4).
- Upload anyway - upload it as a new, independent document even though the content matches.

4.8 Barcode Scanning

If a photo has a barcode or QR code visible in it (a product label, an equipment nameplate...), DMS can read the code directly from the image - no need to type it in by hand.

65. Open the viewer for that image (or a PDF containing one).
66. Click Scan Barcode at the top.
67. On success, a banner shows the code type and value detected (e.g. "CODE128: 6901234567892").
68. The result is saved automatically as the document's "Barcode" parameter, viewable/editable in the metadata section below; if a photo has more than one barcode, they're saved in turn as Barcode, Barcode2, Barcode3, and so on.



Figure 4-6 Scan Barcode: the success banner after a successful read

Tip: The capture date and GPS location need no extra effort - DMS already pulls those from a photo's EXIF data on upload (see section 4.1); “Scan Barcode” just adds the code's own content. Put together, a single photo can record when, where, and what code all at once.

Note: This runs entirely offline (built on the open-source zbar library), sends nothing anywhere, and needs no AI key - but it does need a reasonably clean image: the code should be sharp, unobstructed, and have a clear quiet zone (blank margin) around it. QR codes shared as phone screenshots - especially ones with a logo overlaid in the middle, or a background that runs right up to the code's edge, like a WeChat “scan to join group” image - usually can't be read this way; typically only WeChat's own scanner or a phone camera can. That's a known limitation of the underlying library, not a bug.

4.9 Ask AI About a Document, or One-Click Polish

Besides the folder-wide “Ask AI” described in chapter 18 (which reads several documents at once), opening a single document's viewer lets you ask questions about just that one document:

69. Open the document viewer and click Ask AI at the top.
70. A panel opens on the right; the AI answers based on whatever text (OCR), description, and key parameters have already been extracted for this document.
71. Type your question in the box (or click the microphone icon to dictate it), then click Send, or press Ctrl/Cmd+Enter.
72. The answer appears below, and the question and answer are both appended to a running Q&A record document kept in the same folder, so you can look back at it later.

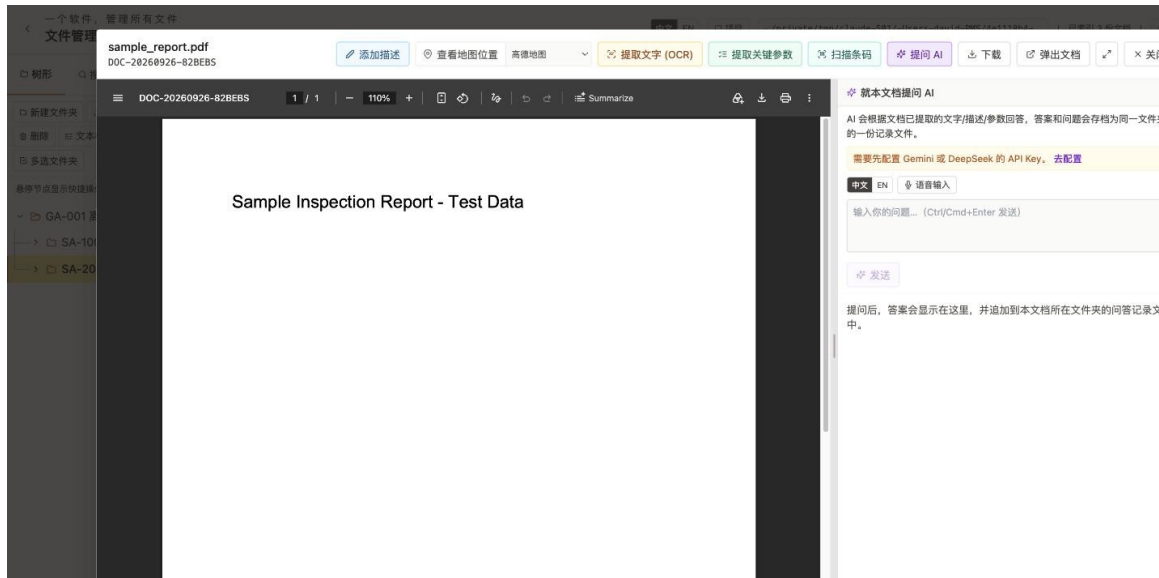


Figure 4-7 Asking AI about a single document (needs a Gemini or DeepSeek API key - section 6.4)

The description panel's AI Cleanup button works the same way for a single document's description: choose "Organize / Polish wording / Make concise," and the AI tidies up rough or dictated text while keeping all the information; the result previews first, and only replaces your text once you click Apply.

4.10 Convert to PDF (Batch)

Need to convert a batch of photos or existing PDFs into a consistent, cleanly named set? You don't have to save each one individually.

73. Check the images and/or PDFs you want to convert in the folder (use Multi-select, or check them inside the dialog that opens).
74. Click Convert to PDF; the dialog lists the checked documents and their sizes.
75. Click Convert N document(s) to PDF.
76. Each document is converted into its own separate PDF (named with a "YYYY-MM-DD-" prefix whenever a date is known); the originals are moved to "Deleted files" (a soft delete - recoverable, see section 3.2).

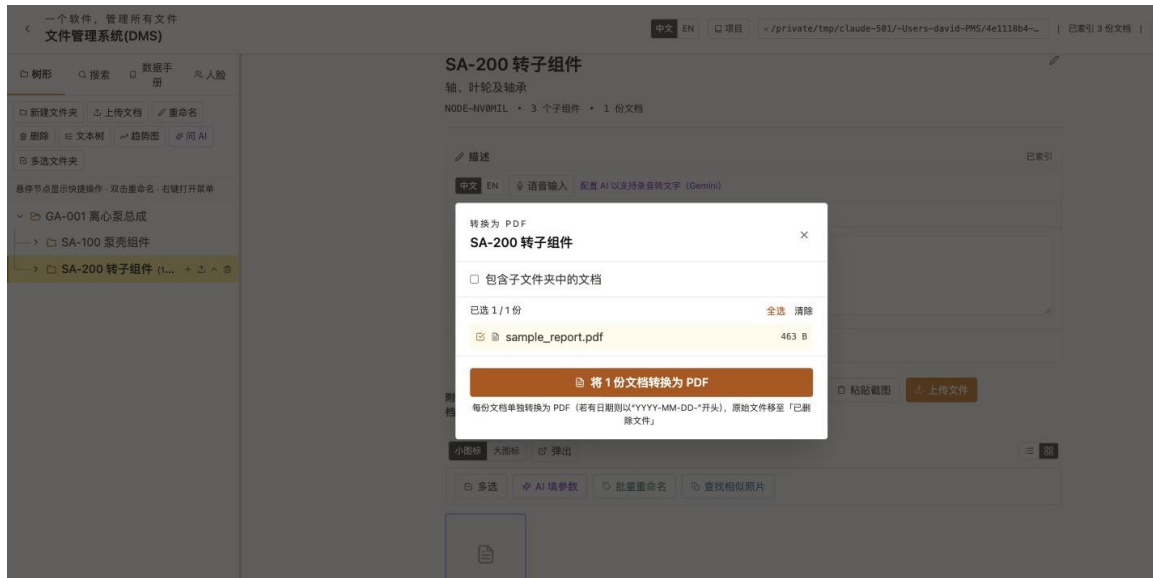


Figure 4-8 The Convert to PDF dialog, with one document selected

4.11 On-Disk Filenames and Recovering Deletions

These are lower-level improvements that need no action from you, but are useful to know about when browsing files in your system's file manager or troubleshooting:

- Filenames on disk now start with the document's name instead of its internal ID (e.g. Inspection Report+DOC-20260920-xxx.pdf), so browsing the storage folder directly in Finder / Explorer immediately tells you what a file is without opening it first.
- A failed upload now reports the actual reason (e.g. disk full, no write permission) instead of a bare, unexplained "500 error."
- Before any change to a project's folder structure (adding/removing folders, moving things, batch operations), DMS automatically saves a snapshot of the structure at that moment; if a particular change ever leaves the structure in a bad state, that snapshot can be used to roll back. This safety net runs entirely in the background - you won't see any UI for it during normal use.

4.12 Batch Document Actions (Multi-select: Download, Batch Rename, Find Near-Duplicates)

The document list has a row of batch-action buttons above it that work on every document in the current folder, without needing to pop out the grid-view window first (Section 19 covers the pop-out window's own batch actions - the two can be used together):



Figure 4-9 Document list toolbar: Select, AI-fill parameter, Batch rename, Find near-duplicates

- Select - check one or more documents, then either Download them to a folder (defaults to your Downloads folder) or Unlink them from the current folder (the documents themselves are soft-deleted - see section 3.2).
- AI-fill parameter - multi-select documents and have AI read one parameter's value off each and fill it in for all of them at once; see section 6.6 for the full flow.
- Batch rename - renames every document in the current folder to "date + location - original name" (the date comes from the document's own capture/archive date, and documents where no date can be resolved are skipped; the location comes from the document's location metadata and is omitted if there isn't one). The actual file on disk is renamed too. Clicking it shows a preview first; nothing changes until you confirm.



Figure 4-10 Batch rename preview: nothing is renamed until you confirm

- Find near-duplicates - check a few photos (or click Select all photos to grab every photo in the folder), then drag the Similarity threshold slider (50%-100%); DMS compares the selected photos pairwise and flags ones that look highly similar to each other (e.g. several near-identical burst-mode shots), making it easy to spot redundant photos to clean up. This is a “looks similar” fuzzy match, a different mechanism from section 4.7’s exact filename-and-size match at upload time.

4.13 Upload Eq Record (AN^SN^PN naming)

For equipment record-keeping: a record is renamed in the format Assembly Number (AN)^Serial Number (SN)^Part Name (PN)^original file name and filed straight into the folder whose name equals that AN, so the file name alone tells you which unit the record belongs to.

- Click Upload Eq Record in the Tree tab toolbar. A window opens that you can drag and resize.
- On the left, pick the AN (assembly number / folder) - type in the filter box first to narrow the list - then optionally fill in SN and PN (both may be left blank).
- Click Choose file... and pick a file. The window shows “Will be saved as:” with the new file name, and previews images, PDFs and text on the right (other types can be downloaded to view).
- Click Upload when it looks right. AN / SN / PN stay filled in afterwards, so you can simply pick the next file.

To upload many at once, click Upload by file name and pick several files whose names are already written as AN^SN^PN.extension (e.g. A100^SN001^Bearing.pdf). DMS splits out the

fields, matches each AN to its folder, and shows a status per row (Uploaded / Already exists, skipped / the reason for an error); click Upload N file(s) to finish.

Note: “^” is the separator because work-order numbers and part names often contain hyphens themselves. The AN must match a folder name, otherwise that row reports that no folder was found. The name stored on disk keeps the AN^SN^PN^original name format.

4.14 QC Review and the QC Review Report

QC Review lets you fill in a review for each of a batch of inspection reports and roll everything up into a deliverable PDF at folder level. The structure: one folder per “Inspection” containing that inspection's report files; each file has its own review form; the folder as a whole has one General Comment.

Uploading QC review records

81. Click Upload QC Review in the Tree tab toolbar. It works like section 4.13, but the fields are Inspection (folder), SN, Equipment Description and WO/PO (Work Order Number / Purchase Order).
82. Upload by file name accepts names in the format Inspection^SN^Equipment Description^WO/PO (e.g. A100^SN001^Bearing^WO-2026-01.pdf), so many files go up in one go.
83. Each uploaded file automatically gets a review form, pre-filled with its Inspection, SN, Equipment Description and WO/PO.

Filling in one file's review

84. Open the document viewer and click QC Review (it reads Add QC Review until one exists). The window widens automatically: the file on the left half, the review form on the right, with a draggable divider.
85. The form has Inspection, SN, Equipment Description, WO/PO, Date Reviewed, Reviewed By, Observation, Mitigation, and Review Result (Pass / Fail / Conditional / Pending).
86. There's no Save button - changes save automatically, and the bottom of the panel shows “Saving automatically...” / “Saved automatically”. These fields are also searchable.

Writing the General Comment and generating the report

87. Select the inspection folder and fill in the General Comment in the folder's QC Review section; the same section lists every file under the folder (subfolders included) that already has a review.
88. Click QC Review Report (or Generate QC Review Report inside that section).
89. In the dialog, choose which actual inspection reports to attach after the review pages: Select all, None (review pages only), or tick them one by one. The review summary pages always list every file.
90. DMS builds a PDF: the General Comment and per-file review summary first, then the chosen inspection reports in order. Word and PowerPoint files are converted to PDF before merging (this needs LibreOffice installed on the computer). The report is filed in

that folder, and generating again regenerates and overwrites it rather than piling up copies.

Tip: The folder and the review fields (Inspection, SN, Equipment Description, WO/PO, Date Reviewed, Reviewed By, Observation, Mitigation, Review Result) can all be found with the search in chapter 7.

4.15 Convert HEIC Photos to JPG

iPhones shoot HEIC by default, which many computer programs can't open. Click HEIC -> JPG in the Tree tab toolbar to batch-convert the HEIC/HEIF photos in a folder to standard JPG:

91. Type a path into Folder with the HEIC photos, or click Browse...; the Output folder may be left blank - then each JPG goes right next to its HEIC.
92. Tick options as needed: Include subfolders, Overwrite existing JPGs, Delete the HEIC after successful conversion (red - use with care), and set the image Quality (default 92).
93. Click Convert. A progress bar shows how many are done; when it finishes you see “N converted, N skipped, N failed”, with reasons listed for any failures.
94. Import the resulting JPGs into DMS with Upload Files / Upload Folder.

Note: Conversion keeps the date taken, GPS and other photo info, and rotates the picture upright. This is a standalone tool for files on disk; it does not alter documents already in DMS. The same converter is available on the command line: `python3 heic_to_jpg.py <folder>`.

4.16 PDF Translation, Find Text, and Edit Metadata

Translate (side-by-side)

Open a PDF and click Translate in the viewer's top toolbar. The right half of the window shows the translation beside the original PDF on the left; the two scroll in sync, so the translation always lines up with the page you're reading.

- Translation happens page by page, and only for the pages near what's on screen, so a large file doesn't take forever. If a page fails, click Retry; pages with no text are marked “No translatable text on this page”.
- The top dropdown picks the target language (Chinese by default, with other major languages available); the dropdown on the right picks Gemini or DeepSeek; the - and + buttons change the translation's font size; click the x at top right to close the translation.
- The dropdown on the right now offers three engines: Fast (free) - the default, no AI key needed - plus Gemini and DeepSeek. Gemini and DeepSeek need the matching AI key configured first (section 6.4). For scanned files with no text layer, run OCR first (chapter 5).
- If Gemini reports “API quota exceeded”, the free quota (usually a daily limit) has run out: retry later, enable billing on the Google project, use another API key, or switch to Fast (free) / DeepSeek.

Save the translation as a PDF

The translation bar has two save buttons. Both translate the WHOLE document and create a new PDF in the same folder as the original, named “original name + language” (e.g. “xxx Chinese.pdf”):

- Save as PDF - lays the translated text out page by page as a plain-text PDF. Simple and fast.
- Save with layout - puts each translation back where the original text was, keeping tables, columns and other layout (needs a PDF with selectable text; may take a minute or two).

Original | Translation (saved translations)

Once a translation is saved, the original and the translated PDF are paired. Open either one and an Original | Translation button appears in the viewer's toolbar: click it to see the original on the left and the saved translation on the right, scrolling in sync. Click it again to leave.

Editing a translation (voice input and colours)

For a saved translation, click Edit at the top of the right-hand pane to correct the text, page by page (cell by cell / paragraph by paragraph for layout translations). You can dictate with the microphone.

- Select text in the box, then click a colour in the palette to set a text colour or highlight on the selection; Clear removes the colour from the selected text.
- Click Save to write the changes back into the translated PDF, or Cancel to discard them.

Search text

Search text in the viewer's toolbar finds a passage inside the current document using fuzzy matching (about 70% similarity counts as a hit), so it doesn't need to match the original exactly and still works with a few OCR errors; a match can jump straight to its page. Documents with no searchable text prompt you to run OCR first.

Edit metadata

Click Edit metadata (Metadata in the info panel) to change a document's metadata. If the same document is linked into several folders, the change applies everywhere it is referenced.

4.17 AI: Detect Service Date

Lab reports and medical exams often show both a date of birth and an exam date, and the upload-time date detector can't tell them apart. AI: Detect service date re-reads existing documents with Gemini, looking specifically for the date the service / inspection / exam took place, and explicitly excluding the date of birth.

- Document list toolbar: click AI: Detect service date, tick several PDFs/images, and start.
- Folder multi-select mode (see section 3.8): tick some folders and click AI: Detect service date to process every PDF/image in them and all their subfolders.
- Progress shows as “Detecting... done/total”. When it finishes, the same confirmation dialog used for upload-time dates opens - nothing is written to a document's date until

you review it. Documents where no service date was found don't appear in the dialog; they're only counted in the message.

Note: This needs a Gemini API key (see section 6.4) and only runs when you trigger it.

4.18 Grouping Photos into Location Folders

Photos that carry location data can now be split one level further than year/month (section 4.1): inside each MONTH folder, photos taken within the same radius of each other go into one place folder, named automatically after the place (for example “Boston, Massachusetts”).

Setting the radius when you upload

95. When you upload photos, a confirmation window first appears. Tick Group photos into location folders (inside each month).
96. Enter a Radius and choose miles or km. The first time it defaults to 10 miles; afterwards DMS remembers the value you used last, so if you don't want to change it just click Upload.
97. To skip place grouping, untick the box - photos are still filed by year/month.
 - Photos within the same radius go into the same place folder, centred on the first photo in that folder. Photos with no location stay in the month folder. Phone uploads (chapter 11) follow the same rule.
 - Place names are looked up in the background after the upload finishes, so uploads aren't slowed down (the progress bar shows “Naming location folders”). If a name can't be found, the folder is temporarily called “Location 1”, “Location 2”, ...

Not happy with the grouping? Regroup

A radius that is too large lumps different places together; too small splits one place apart. You can change it any time:

98. Right-click the folder holding the photos and choose Regroup photos by location...
99. Enter a new radius and unit; the window previews how many place folders it will produce.
100. When you're happy, click Regroup. You can tick Also use this radius as the default for future uploads. Repeat as often as you like.

Tip: This also tidies up photos you uploaded earlier that were never grouped by place. When regrouping, place folders whose names you edited by hand are renamed again; other folders and documents are not affected.

5 OCR - Extract Text from Documents

5.1 How OCR Works

OCR (Optical Character Recognition) converts scanned images and PDFs into searchable text. DMS uses the Tesseract OCR engine, which supports both English and Chinese (Simplified).

DMS uses two methods to extract text:

Method	When Used	Speed
Text Layer	PDFs that already contain digital text	Very fast
Tesseract OCR	Scanned PDFs, images, or corrupted text layers	Moderate (depends on file size)

Note: If Tesseract is not installed on the machine, OCR for images will not be available. Text-layer extraction for digital PDFs still works.

5.2 Running OCR

101. Open the document viewer by clicking the document name.
 102. Click Extract Text (OCR) in the toolbar.
 103. DMS extracts text and displays it in the text panel.
 104. If the document is a PDF with an embedded text layer, extraction is instant.
 105. If OCR is needed (a scan or an image), a progress indicator appears.
 106. When finished, the extracted text is shown in an editable text area.
- You can correct OCR errors by editing the text directly.
 - The panel also shows the number of pages processed, character count, detected language, and extraction method used.

Note: If a PDF has a corrupted or incorrect text layer, click Force OCR to re-extract using Tesseract instead.

5.3 Saving OCR Text for Search

107. After reviewing (and optionally editing) the extracted text, click Save & Make Searchable.
108. The text is saved with the document's metadata.
109. The document now appears in search results whenever you search for words it contains.

Tip: You only need to run OCR once per document. The text is stored and the document stays searchable forever.

6 Key Parameter Extraction

6.1 What Are Key Parameters?

Key Parameters are user-defined labels (like “Contract Number,” “Pressure Rating,” or Chinese labels like “人物” / “事件”) that DMS can automatically find and extract from document text.

This lets you quickly compare values across large numbers of documents, and - combined with chapter 6.5 - chart how a given value changes over time.

6.2 Extracting Parameters from a Document

110. Open the document viewer.
111. Click Extract Key Parameters in the toolbar.
112. A list of parameters appears (global defaults, plus any you add for this document).
113. Check the parameters you want to extract.
114. Optionally toggle “Also search the next line when the same line has no value” off if you only want same-line matches.
115. Click Extract from Document Text.
116. Review the results and edit any values if needed.
117. Click to save the values into the document's metadata.

Tip: You can also turn on AI-assisted extraction (needs an API key - section 6.4), which reads the document image directly and can be more accurate for handwritten or oddly formatted values, at the cost of being slower.

6.3 Managing Global Key Parameters

118. Click the Project menu in the header.
119. Choose Global Key Parameters.
120. In the dialog, add, remove, or reorder parameters.
121. Click Restore Defaults to reset to the default parameter list.
122. Changes take effect immediately for all future extractions.

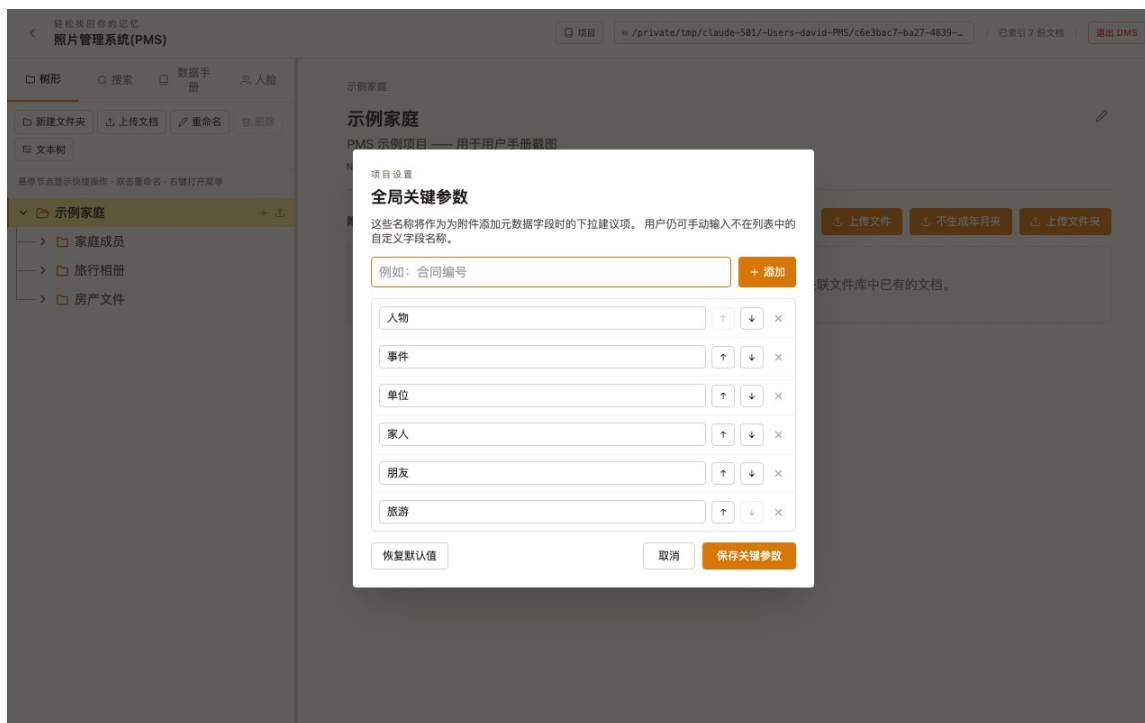


Figure 6-1 The Global Key Parameters dialog

6.4 Configuring an AI Provider (Gemini / DeepSeek)

AI-assisted key-parameter extraction, Ask AI (both for documents and folders), and the description panel's AI Cleanup and typo-check all share the same API-key setup - configure either provider, or both:

123. Click any “Configure AI (Gemini)” link wherever it appears (the description panel, an Ask AI panel, the key-parameters panel, and so on all lead to the same dialog) to open the AI Provider Settings dialog.

If you don't have an API key yet, a “Don't have an API key?” link sits right below each provider's input field in that dialog and jumps straight to its free sign-up page in a new browser tab:

Provider	Free sign-up URL	Steps
Google Gemini	aistudio.google.com/apikey	Sign in with a Google account (free to create one if you don't have one) → click “Create API key” → choose a new project or an existing Google Cloud project → copy the generated key (a string starting with “AIza”).
DeepSeek	platform.deepseek.com/	Sign up / log in to the

	api_keys	DeepSeek platform → on the “API Keys” page, click to create a new key → copy the generated key.
--	----------	---

124. Back in DMS's AI Provider Settings dialog, paste the copied key into the matching provider's field and click its Save button.
125. The two providers' keys are stored completely independently; with both configured, each AI feature generally prefers Gemini and falls back to DeepSeek automatically when Gemini isn't available.

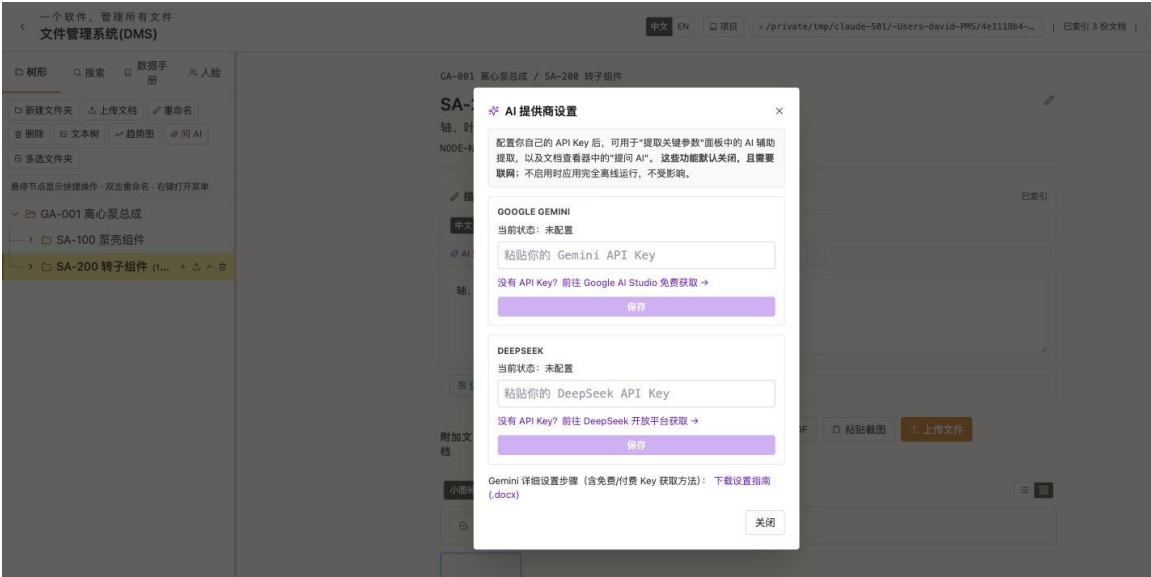


Figure 6-2 AI Provider Settings: Gemini and DeepSeek configured separately

Note: These AI features are opt-in and need an internet connection; with no key configured at all, every core DMS feature (folder management, uploads, OCR, barcode scanning, search, and so on) still runs fully offline and is unaffected. Keys are stored only on this machine (a local server-side file) and are never uploaded to any DMS-related or third-party server.

Tip: Both providers offer a free tier - no credit card needed for occasional use. Free tiers are rate-limited (a cap on calls per minute/day); if you process a lot of documents in a short burst and see a “temporarily over the limit” message, just wait a bit and retry.

Tip: Next to “Detailed Gemini setup steps (including how to get a free/paid key)” in the dialog is a Download setup guide (.docx) link, with screenshots showing how to sign up for a Google account, request a free Gemini API key, and later

upgrade to a paid tier if you need higher limits - handy if you've never gotten one before.

6.5 Parameter Trend Charts and Snapshots

Chart how a key parameter's value changes over time - useful for blood pressure, account balances, inventory levels, or any reading that needs to be logged repeatedly and reviewed for trends.

126. Select a folder and click the Trend Chart button in the toolbar.
127. In the Parameter dropdown, choose which key parameter to plot (only parameters with a numeric value somewhere in this folder or its sub-folders are listed); choose a line or bar chart, pick a field for the horizontal axis (such as document date), and “Include sub-folders” controls whether documents in child folders count too.



Figure 6-3 The trend chart window (this folder has no numeric parameters yet; picking one shows a line/bar chart)

128. Like the document viewer, the chart window can be dragged, resized by its edges, or popped out into its own window; the axis ranges can also be set manually instead of relying on auto-scaling.
129. Happy with a particular parameter's chart? Click Save Snapshot - DMS records that parameter's current total/latest value into an “[X] History.xlsx” document; save a few snapshots over time and you get a chart of how the value has changed.

Tip: Typical use: click Save Snapshot on a “Bank Account” folder's balance parameter at the end of each month; after a few months you'll have a chart of the balance trend. The same pattern works for blood pressure, body weight, or periodic inventory counts.

130. Once there are enough data points, click Fit with Gemini in the chart window (it becomes Re-analyze once you have a result) to have Gemini fit a trend line across the values and comment on it in plain language (e.g. “overall upward trend; the latest reading is slightly above average”). Needs a Gemini API key configured first (section 6.4).

6.6 Batch AI Parameter Extraction (Multi-select Documents)

Section 6.2 covers opening one document and manually checking parameters to extract them one at a time. To fill in the same parameter across a whole batch of documents at once, use AI-fill parameter in the document list toolbar instead - no need to open each document individually.

131. Above a folder's document list, click AI-fill parameter; the toolbar switches to multi-select mode.
132. Check the documents to process (or click Select all), then click AI-extract parameter on the right.
133. In the dialog, pick an existing key parameter from the dropdown, or type a new parameter name below it.

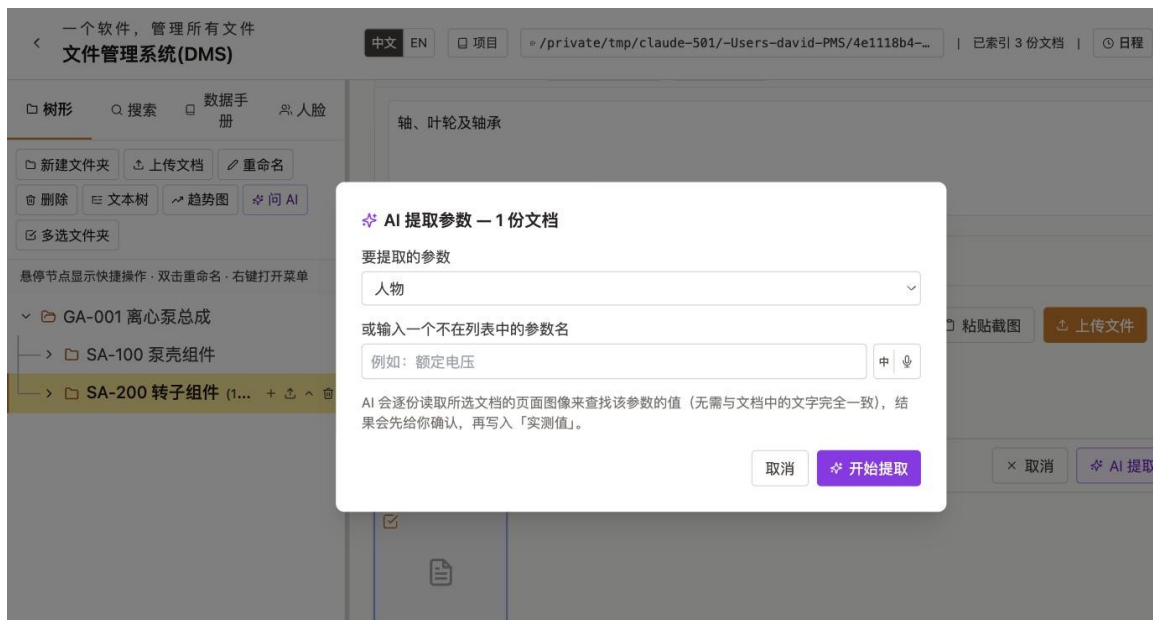


Figure 6-4 The AI-extract parameter dialog: choose a parameter, with the document count checked

134. Click Start extracting. DMS reads each selected document's page images to find that parameter's value (it doesn't need to match the document's text verbatim); results are listed for you to review first, and only get written into each document's “Actual Value” once you click Apply.

Note: Because this reads the page images themselves, it works just as well on scans and photos with no text layer. Needs a Gemini API key configured first (section 6.4).

7 Searching Documents

7.1 Basic Search

135. Click the Search tab in the sidebar.
136. Type a word or phrase in the search box.
137. Results appear instantly as cards showing:

- Document name and file type icon.
- Upload date, file size, document ID.
- All metadata fields (parameter name / value).
- GPS-derived location (if available).
- Which folders reference this document.

Note: Search is case-insensitive and partial-match - typing “pump” will find “Pump Assembly,” “centrifugal pump,” and so on.

When you type more than one word, the “Multi-word match” control next to the search box decides how they combine:

- All words (AND) - the default. A document must contain every word you typed (in any order) to match.
- Any word (OR) - a document matches if it contains at least one of the words.
- Whole sentence - the entire contents of the search box is matched verbatim, as one exact phrase, instead of being split into separate words.



Figure 7-1a The Multi-word match control: All words (AND) / Any word (OR) / Whole sentence

Tip: Switch to “Any word (OR)” when you're not sure which of several related terms a document uses (e.g. “invoice receipt bill”); switch to “Whole sentence” when you want to find one specific phrase and AND/OR are turning up too many unrelated partial matches.

7.2 Using Filters

Filter	How to Use
File Type	Check Image, PDF, Text, or Documents to restrict results to that type.
Scope	Enable “Scope to selected node” to search only within the currently selected folder and its sub-folders.
Metadata	Enter a parameter name and/or value to find documents with matching metadata.

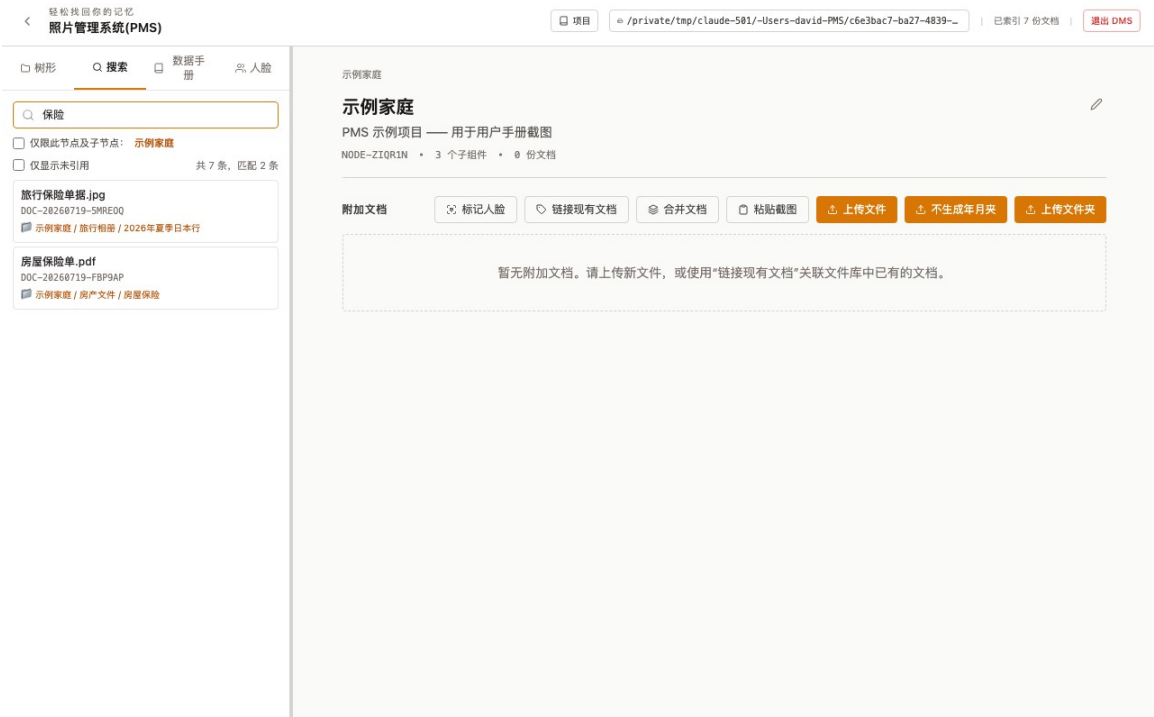


Figure 7-1 Example search results

7.3 Opening and Jumping to Results

- Click a result card to open the Document Viewer for that document.
- Double-click a result card to switch to the Tree tab and jump straight to the folder containing that document.

- When a search hit is inside a PDF, the viewer shows a Jump to page N button: click it to go straight to the page of the match, with the matching text highlighted in RED, so you don't have to hunt page by page.

8 Generating a Databook (PDF / Word)

The Databook feature combines selected documents into a single, professional document with a cover page, table of contents, section headers, and page numbers. Two modes are available: manually checking documents to build a PDF (8.1-8.2), or automatically generating an editable Word document from a folder's structure (8.3).

8.1 Selecting Documents (PDF mode)

138. Click the Databook tab in the sidebar.
139. The tree is shown with a checkbox next to each folder, plus a Select All link.
140. Check individual documents, or use the shortcuts:
 - Click Select All next to a folder to select every document in that folder (optionally including sub-folders).
 - Click Clear to deselect everything.

Tip: Your selection is saved automatically - close and reopen DMS and it will still be there.

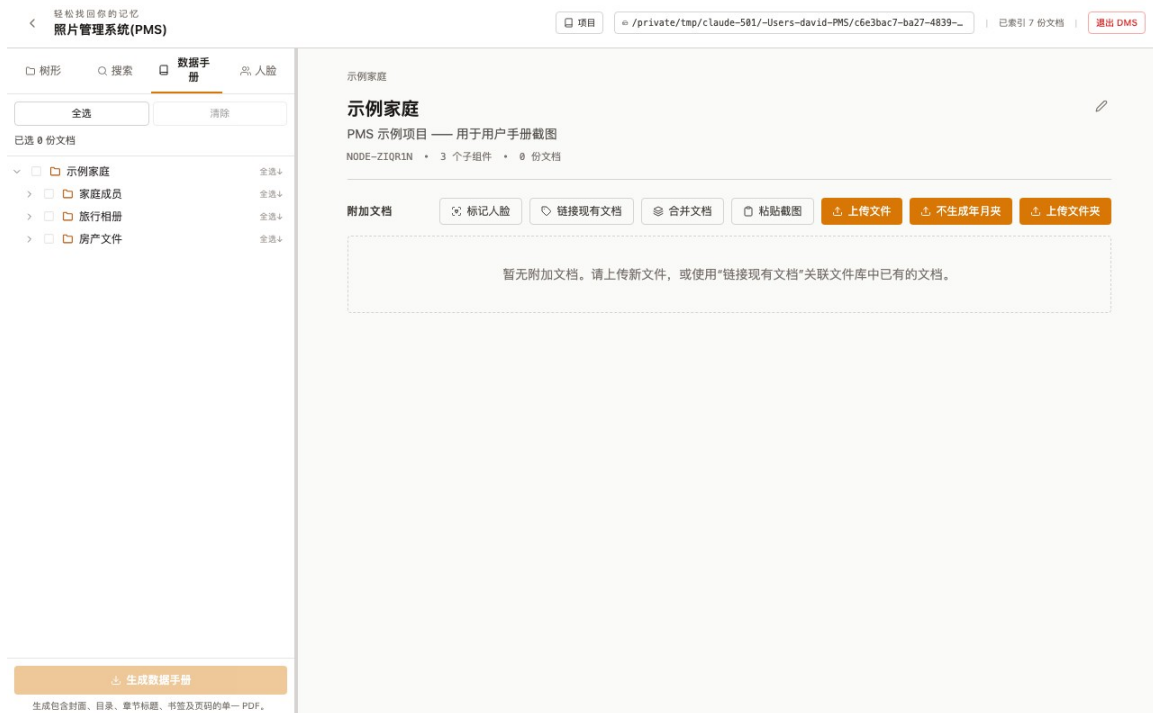


Figure 8-1 The Databook tab: checking documents to include

8.2 Generating the PDF

141. After selecting documents, click Generate Databook.
142. In the dialog, enter a Title (the main heading on the cover page) and a Subtitle (a secondary line, e.g. project name or revision number).

143. Optionally add Cover page(s): upload one or more PDF, Word, PowerPoint or image files, which become the very first pages, ahead of the auto-generated cover and table of contents.
144. Click Generate and Download.
145. DMS generates the PDF on the server and your browser downloads it automatically.

The generated PDF includes: a cover page (title, subtitle, date), a table of contents with clickable bookmarks, section-header pages, all selected documents in tree order, and page numbers/footers throughout.

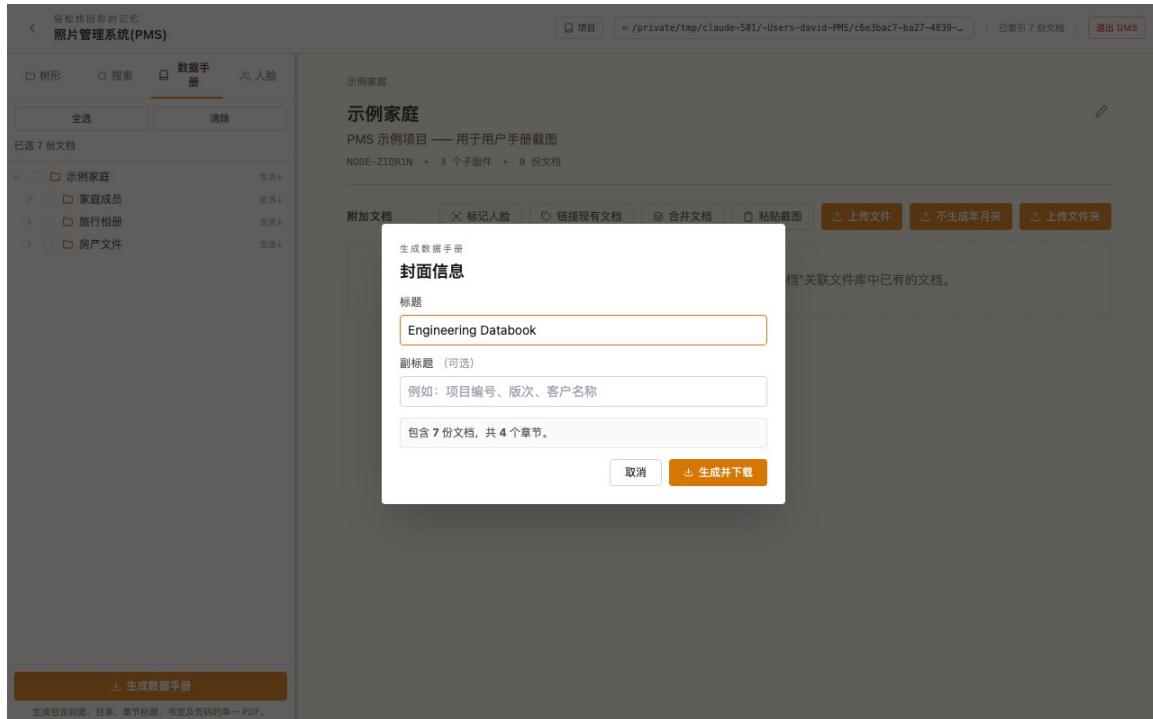


Figure 8-2 The Generate Databook dialog

8.3 Auto-Generating a Word Databook from a Folder

Instead of hand-checking individual documents, this mode only needs you to pick one “top” folder - DMS automatically turns the folder structure into chapters, producing a .docx file you can keep editing and reformatting in Word - useful when you need to tweak layout before submitting it, or the recipient specifically wants Word rather than PDF.

146. Click the Databook tab in the sidebar, then switch to Auto-Generate by Folder (Word).
147. Check one folder - each of its sub-folders (nesting to any depth) becomes a chapter, documents within a chapter keep their existing folder order, and each document is followed by its own description text.
148. Click the generate button; DMS builds the .docx file on the server and your browser downloads it.



Figure 8-3 The Databook tab's two modes: “Manual selection (PDF)” and “Auto-generate by folder (Word)”

Note: Both modes create a brand-new file and never modify the original documents in your folders. The Word mode's tables, headings, and body text are native, editable Word content - not PDF pages pasted in as images - so you can freely add, remove, or reformat text afterward.

9 Merging Documents into a Single PDF

Merge combines multiple PDFs and images from a folder into one PDF file, which is then added back into that folder.

149. Select a folder in the Tree tab.
150. Click Merge Documents in the main content panel.
151. A dialog opens listing the documents in the folder.
152. Check the documents to merge (or click Select All).
153. Click Merge.
154. DMS creates the merged PDF and adds it to the current folder.

Note: Merging only supports PDF and image formats; Word/Excel/PowerPoint and other formats should be saved as PDF first, then uploaded and merged. The original documents remain in the folder afterward - unlink them manually if you no longer need the individual copies.

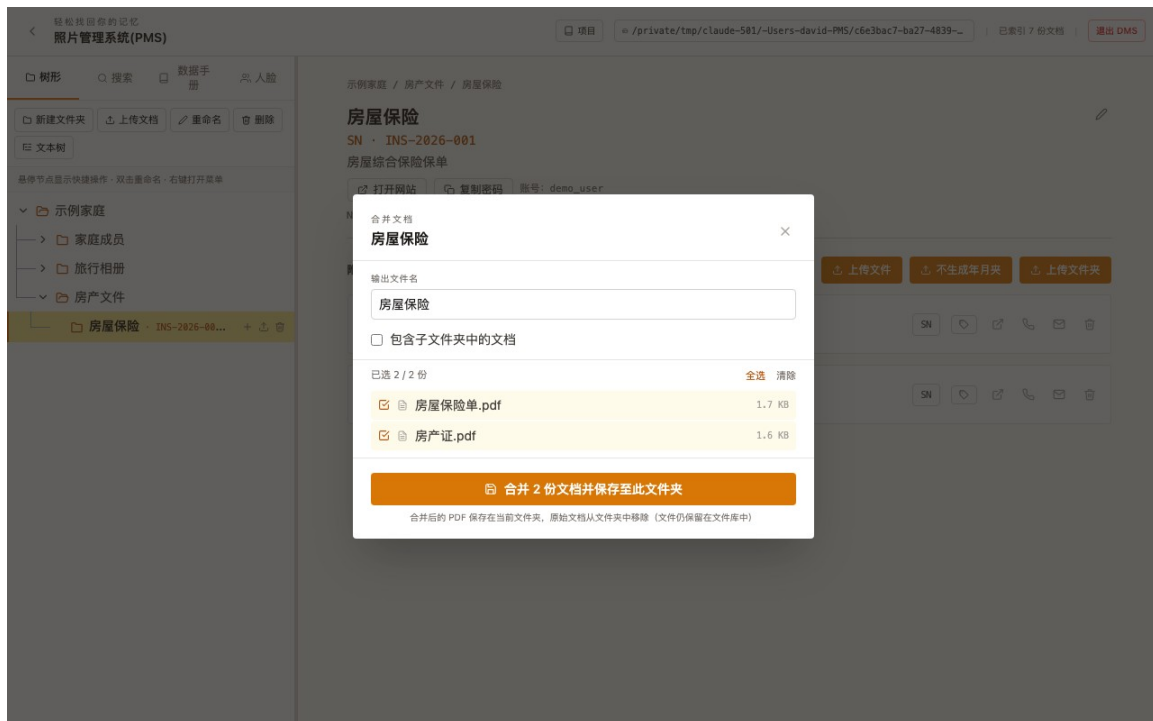


Figure 9-1 The merge-documents dialog

10 Face Recognition

The optional face-recognition component lets you tag faces in your photos and later browse them by person, with DMS automatically matching new photos of people it already knows.

10.1 Installing the Face Recognition Component

155. Click the Faces tab in the sidebar.
156. If the component (deepface) isn't installed yet, a prompt explains this and offers an Auto-install deepface button.
157. Click it and wait - this downloads TensorFlow and related libraries in the background and can take several minutes on a slow connection; you can keep using the rest of the app meanwhile.

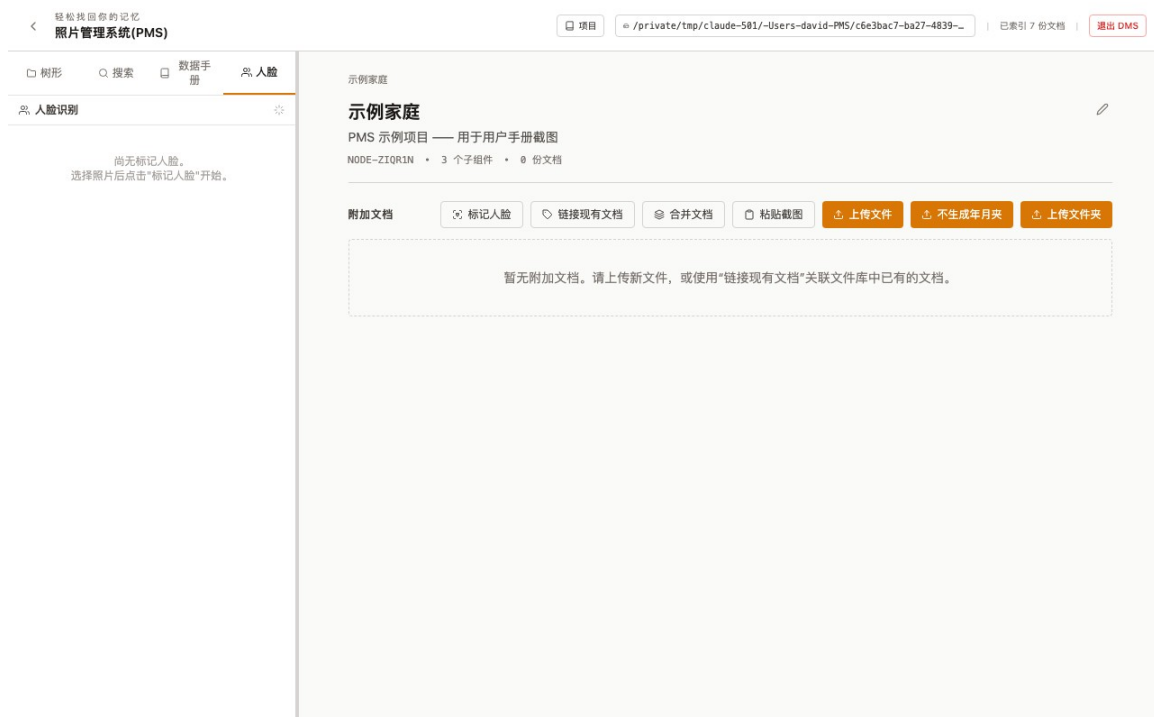


Figure 10-1 The Faces tab (shown here with the component already installed, hence the empty state; before installing, you'd instead see a prompt with an Auto-install deepface button)

Tip: If auto-install keeps failing (more common on Windows), download the Face Recognition Install Guide (.txt) - Windows from the Project menu's Downloads group for manual, step-by-step instructions for installing Python 3.12 and deepface.

10.2 Tagging Faces

158. From a folder, click Tag Faces to enter selection mode.
159. Check the photos you want DMS to scan for faces.

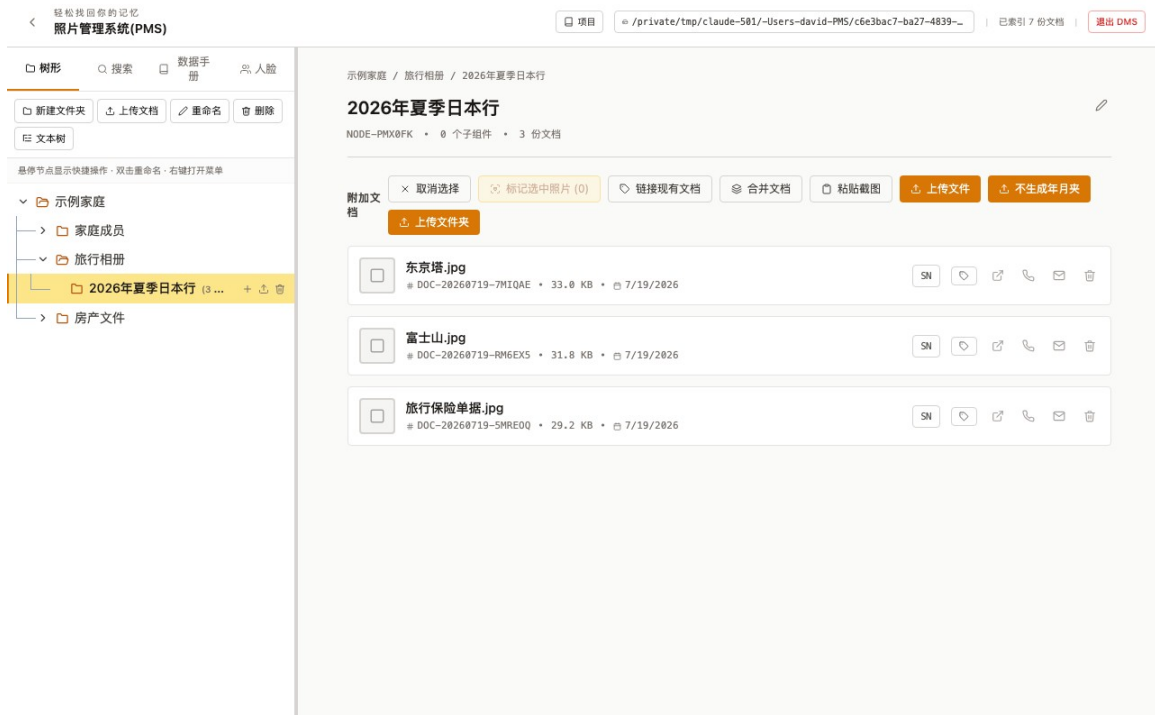


Figure 10-2 Selection mode: photos checked for face detection

160. Click to run detection; DMS finds faces in the checked photos.

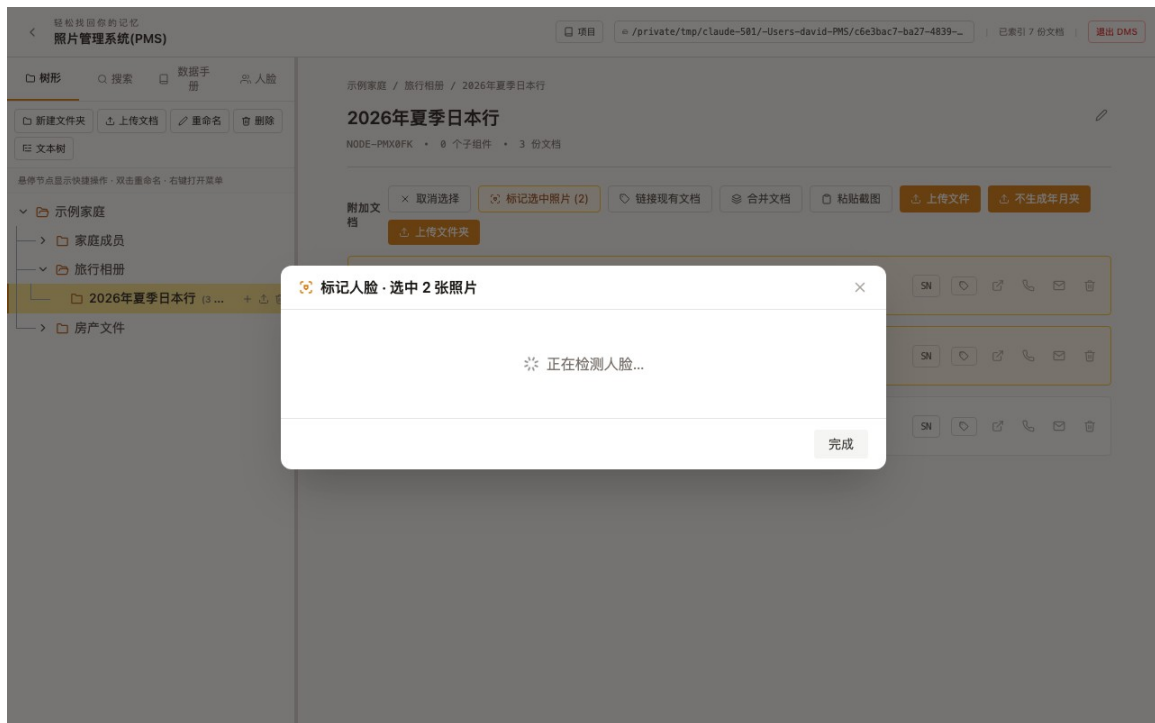


Figure 10-3 Face detection in progress

161. For each detected face, type a person's name (or pick an existing one) to tag it.

10.3 Browsing by Person / Auto-Matching

Once some faces are tagged, the Faces tab lets you browse photos grouped by person. New photos you tag later are automatically compared against known faces and suggested matches, so you don't have to name every single photo of the same person from scratch.

Auto-matching can be interrupted at any time with the Stop button; results found so far are kept. In a person's photo gallery, Create matches folder gathers all of that person's photos into a new “人脸匹配/name” folder for easy viewing or export.

11 Remote and Mobile Upload

11.1 Sending a Single Document to a Phone

Click the “send to phone” icon on any document card to generate a link that opens the document directly on a phone's browser - share it by SMS/iMessage, or copy the link and send it any way you like.

11.2 Remote Upload (QR-Code Batch Intake)

To receive a batch of photos or files from someone else's phone (or your own) without emailing them one by one, use Remote Upload from the desktop launcher: it shows a QR code that, once scanned, opens an upload page on the phone's browser, and anything uploaded there lands directly in the folder you chose on the desktop.

Note: Remote upload works over your local network by default; sending or receiving across the open internet requires the tunnel/ngrok setup described alongside that feature in the app, which is outside the scope of this manual section.

12 Project Management

The Project menu (in the header bar) provides tools for backing up, restoring, merging, and importing data.

Note: If you've set an access password (Chapter 14), all three export types (METADATA / COMP / PART) show an “Automatically encrypted with the project password” note in the menu - the exported .dms file is encrypted with that password, and the same password is needed to decrypt it when importing on another machine. Without a password set, exported backups are not encrypted.

12.1 Export Index Backup (METADATA)

Backs up only the folder-tree structure and metadata (not the actual document files) as a .dms file, named with a METADATA- prefix. Much smaller and faster than a full backup - useful for structural snapshots.

12.2 Export Full Backup (COMP)

Backs up the entire folder tree and every document file, packaged as a .dms file with a COMP- prefix. This is a complete, self-contained backup of the project.

Tip: Save this file to a USB drive or cloud storage as a regular backup.

12.3 Export Selected Folders (PART)

Lets you pick specific folders to export (with their files), producing a .dms file with a PART- prefix - useful for sharing or archiving just part of a project.

12.4 Backup Retention Rules

The project keeps the 10 most recent .dms backups in the project's root folder; older ones are automatically moved into a “Not Shown in The Tree” archive folder at the root of the storage directory (not to be confused with the similarly named “Not Show in Tree” node inside the document tree from section 3.2, which holds soft-deleted documents instead).

12.5 Import a Project (.dms)

162. Click Project, then Import Project (.dms) and select the file.
163. Choose a destination folder for the import (a new, empty folder is recommended).
164. Click Import and Switch.
165. DMS extracts the files and rebuilds the tree structure, and switches the active project to it.

Note: Importing only restores the folder-tree structure; it never deletes files already on disk.

12.6 CSV Export

Click Project, then Export Metadata (CSV) to download a spreadsheet with one row per document, including document ID, name, size, upload date, and metadata fields. Open it in Excel or Google Sheets for analysis or sharing.

12.7 Batch ZIP Import

Upload a large batch of files at once using a naming convention, and have DMS automatically sort each one into its matching folder.

166. Prepare a ZIP file, naming each file inside it like this: FolderName#description.pdf (e.g. Home Insurance#2026 Policy.pdf) - the part before the # is the destination folder name, and everything after the # is the rest of the filename, which can be anything you like.
167. Click Project, then Import Documents from ZIP, and choose your ZIP file.
168. DMS reads every filename, matches the part before the # against folder names in the tree, and places each document into the matching folder.

Note: Folders referenced by a filename must already exist in the tree before importing (unlike Hierarchy Import in section 12.8, this does not create new folders). Documents whose folder name doesn't match anything are left unlinked.

Note: If the same folder name occurs more than once in the tree (e.g. a “Bolt” sub-part under both “Rotor Assembly” and “Housing Assembly”), matching by bare name lands on whichever one comes first, which may not be the one you meant. In that case, use a “/”-separated path before the # instead of a bare name - starting from the root or from any ancestor folder that makes the path unique - e.g. Rotor Assembly/Bolt#List.pdf to land specifically on the “Bolt” folder under “Rotor Assembly” rather than the identically-named one under “Housing Assembly.”

12.8 Hierarchy Import (with auto de-duplication)

Builds a folder tree quickly from a plain text/CSV file - handy for turning a bill of materials or org-chart export from another system straight into a matching folder structure.

169. Prepare a text file with 2-3 comma-separated columns per line:

Column	Meaning	Notes
Column 1	Folder name	Required. The folder this row creates.
Column 2	Parent folder name	Which already-listed folder this one nests under; leave blank for the root. The file's very first row is the root folder itself, so its own parent column must be blank (or omitted).
Column 3	Description (optional)	Can be left out of the file entirely. When present, it becomes that folder's initial description text.

Example:

```
Top Assembly
Pump Housing,Top Assembly
Rotor Assembly,Top Assembly
Impeller,Rotor Assembly
Shaft,Rotor Assembly
```

Note: Level-heading rows exported by BOM tools (lines that just say something like “Level 1”) are skipped automatically - no need to delete them by hand. If the first row is a column-title row (“folder name, parent folder name, description,” in whatever wording), DMS detects that structurally from how the rows reference each other and ignores it automatically too, without you needing to delete it.

- 170. Click Project, then Create Folder Tree from Hierarchy, and upload (or paste) the text.
- 171. Click Validate. If the same folder name repeats anywhere in the file, this is flagged as an error by default, listing the conflicting lines.

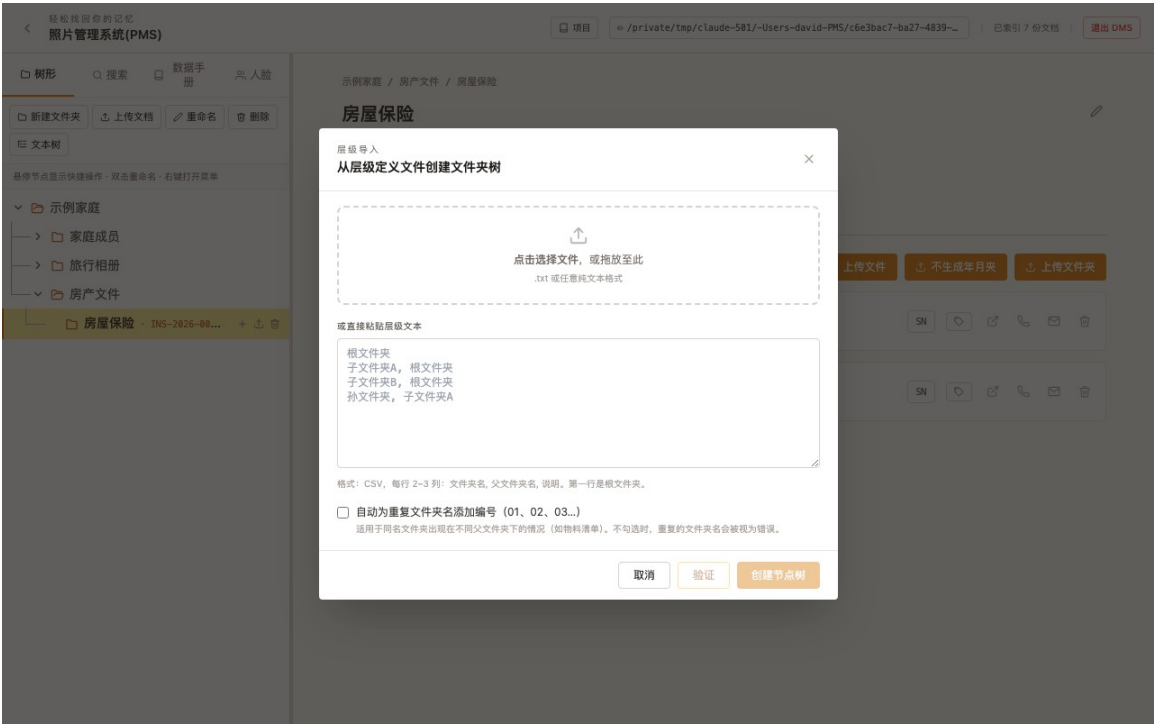


Figure 12-1 The hierarchy import dialog (initial state)

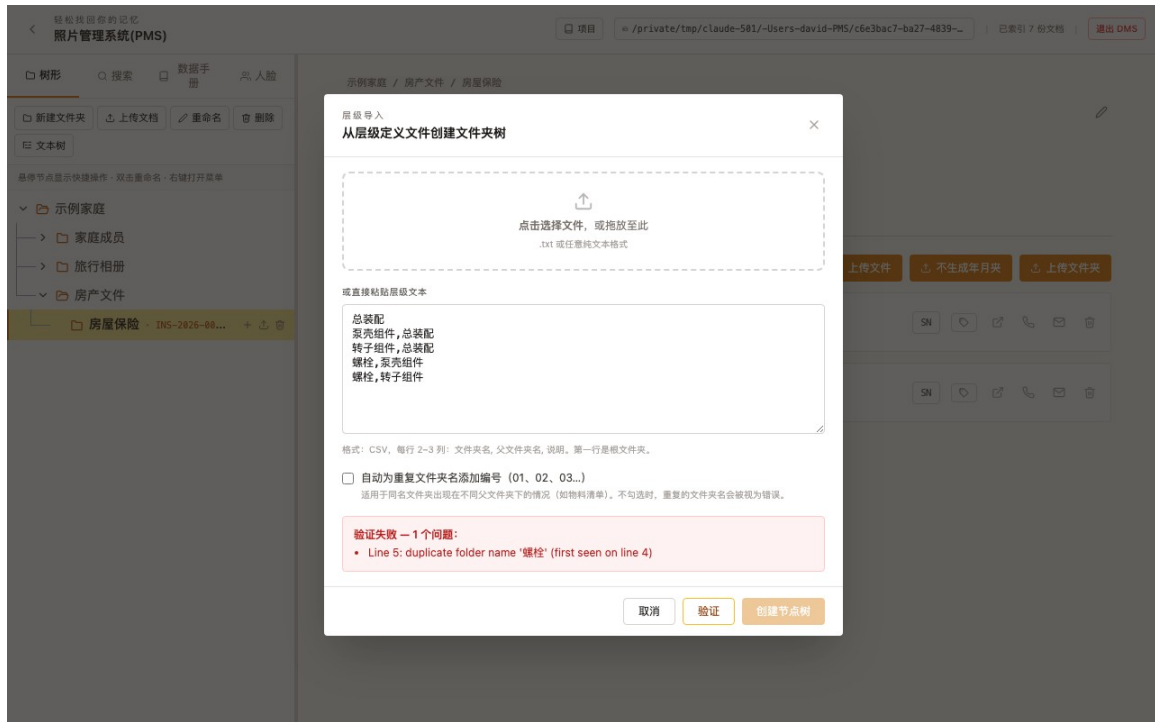


Figure 12-2 With auto-numbering off, a duplicate folder name is flagged as an error

172. If your data genuinely has same-named folders on purpose (e.g. a “Bolt” sub-part repeated under several assemblies), check Auto-number duplicate folder names (01, 02, 03...) and re-validate - every repeated name is automatically numbered in turn (“Bolt 01,” “Bolt 02,” ...) and the whole file now passes validation instead of erroring.

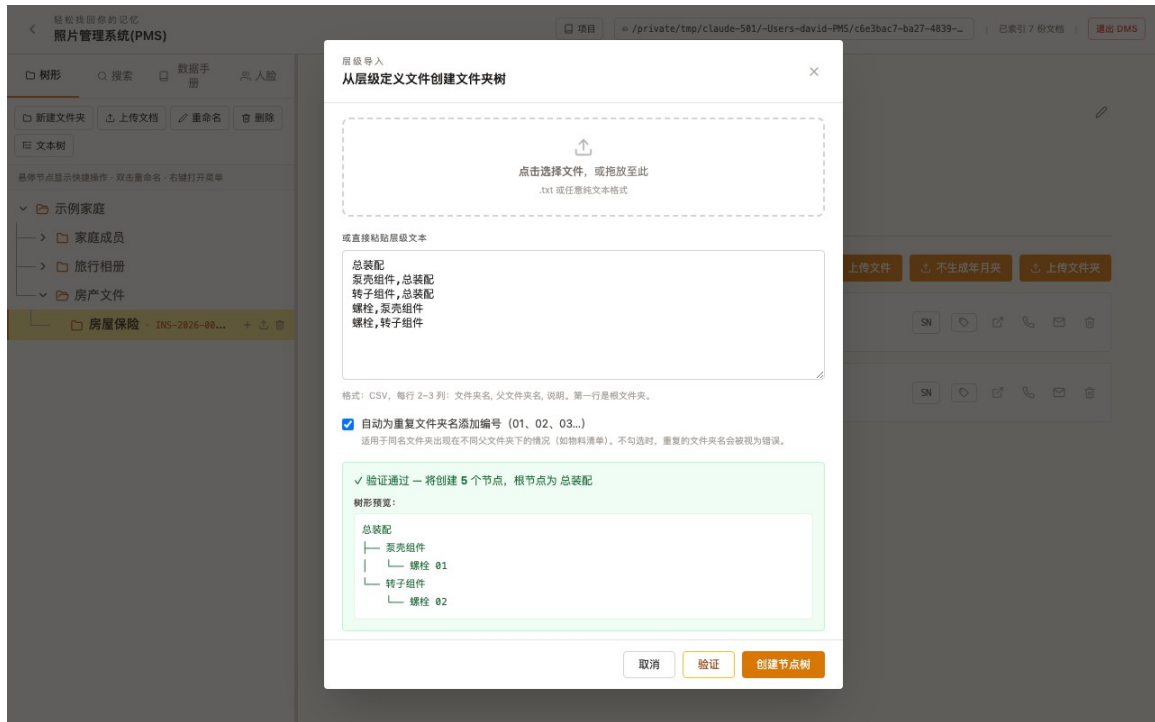


Figure 12-3 With auto-numbering on, the duplicate name is numbered and passes validation

173. Once validation passes, a tree preview and the number of nodes to be created are shown.
174. Click Create; all folders appear in the tree immediately.

12.9 Downloading This Manual from Inside the App

Click Project, then Download User Manual (.docx) under the Downloads section, to get the same manual you're reading now, generated fresh from inside the running app.

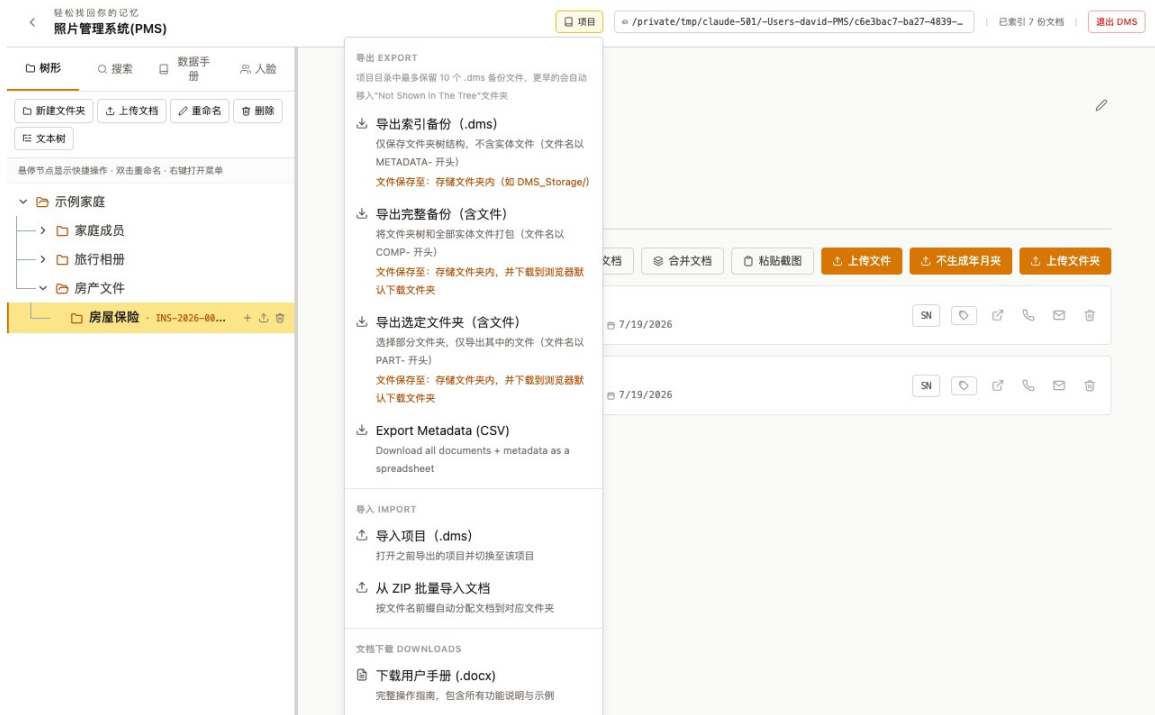


Figure 12-4 The Project menu: export, import, and settings

13 Cloud Sync and Email

13.1 Using OneDrive to Sync Storage

Pointing your DMS storage folder at a location synced by OneDrive (or a similar cloud-sync service) gives you automatic off-site backup with no extra steps - every change DMS makes on disk gets picked up and uploaded by the sync client in the background, the same as any other file in that folder.

Note: Very large libraries, or a very slow internet connection, can make cloud sync lag behind your local changes; this is a property of the sync client, not of DMS.

13.2 Email Sending Setup

To use the “email” action on a document card, configure an SMTP account first.

175. Click Project, then Email Sending Setup.
176. Enter your SMTP server, port, username, and password (an app-specific password is usually required for Gmail/Outlook accounts with two-factor authentication).
177. Save the settings; DMS uses them to send documents as attachments going forward.

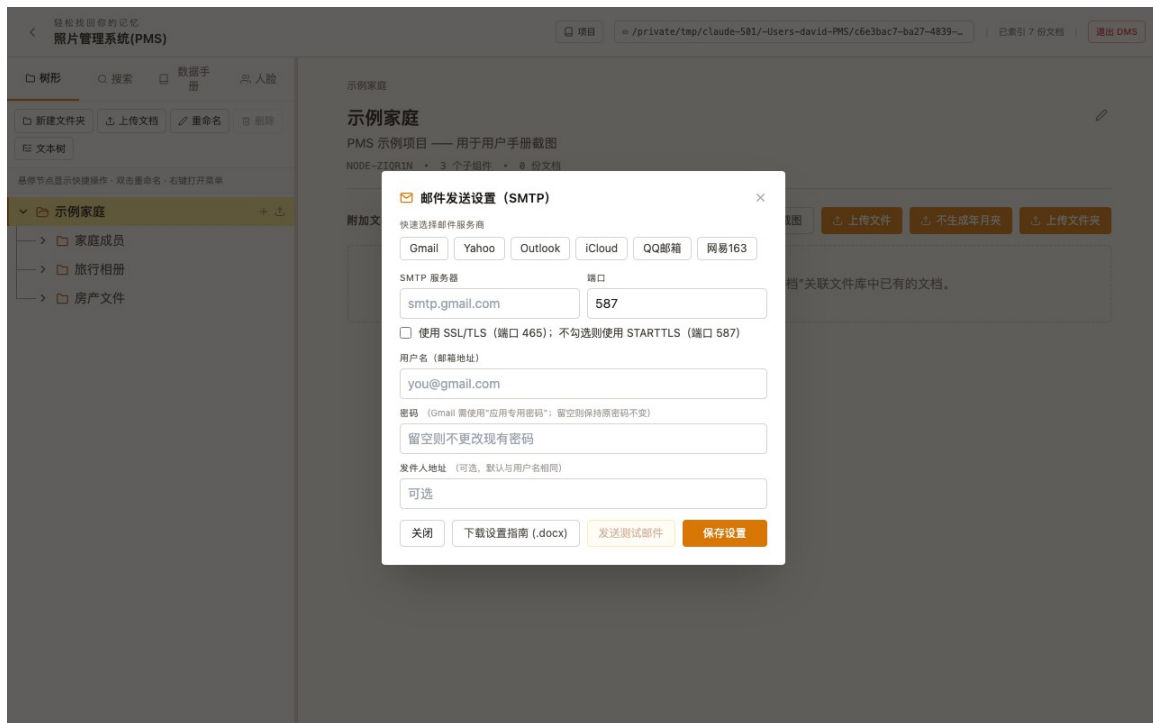


Figure 13-1 Email sending (SMTP) settings dialog

Note: On Mac, if SMTP hasn't been configured, clicking the email action instead opens your system Mail app with the document attached, so the feature still works without any setup.

Tip: The Download setup guide (.docx) button in the dialog gives step-by-step, illustrated instructions for enabling SMTP and generating an app-specific password in common providers like Gmail and QQ Mail.

14 Password Protection

You can protect DMS with a password so that only authorized users can access the data - strongly recommended once you've enabled LAN access, remote upload, or saved any website login credentials (section 3.6).

Set a password:

178. Click Project, then Set Password.
179. Enter and confirm your chosen password.
180. Click Set.
181. On the next DMS startup, a login screen appears before the main interface.

Remove the password:

182. Click Project, then Change Password.
183. Enter your current password to confirm, then leave the new password fields blank.
184. Click Set to remove password protection.

Logout:

- Click Logout in the header bar.
- DMS returns to the login screen. The server keeps running; only the browser session ends.

Note: The password is stored as a salted hash on the server (SHA-256, 100,000 iterations) - never in plain text. A folder's saved website login password (section 3.6) uses a separate, independent reversible-encryption scheme; the two don't affect each other.

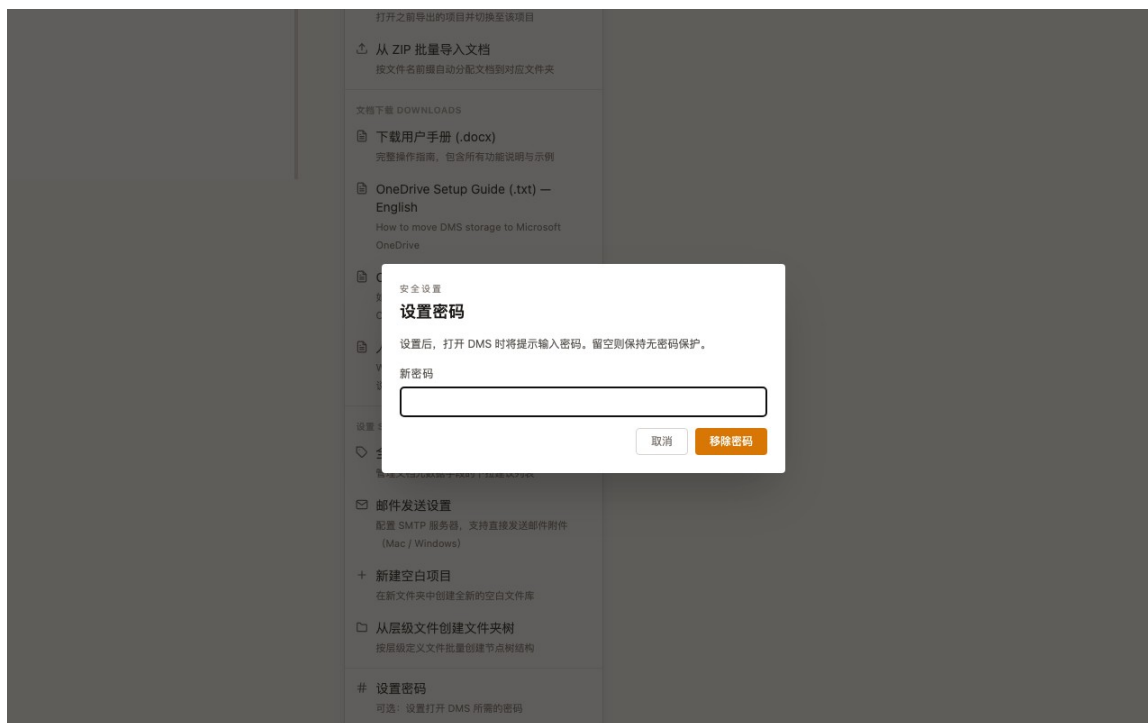


Figure 14-1 The set/remove password dialog

15 Keyboard Shortcuts

Action	Shortcut
Confirm folder rename / new folder name	Enter
Cancel rename / new folder	Escape
Start renaming a folder	Double-click the folder name
Open folder context menu	Right-click the folder
Close the Document Viewer	Escape, or click Close
Paste a clipboard image into the current folder	Ctrl+V (Windows) / Cmd+V (Mac)
Copy selected text	Ctrl+C
Select all text in a text field	Ctrl+A
Undo (in text fields)	Ctrl+Z
Jump to the previous/next document in the viewer	← / → (left/right arrow)

16 Working with Multiple Projects at Once

DMS is no longer limited to one project at a time.

185. Click the Project menu in the header bar and choose the “open another project” option (or simply run DMS.app / DMS.exe again and pick a different project in the startup window described in section 1.3).
186. DMS starts a separate window and its own service for the new project, on a different local port, completely independent of the first window - both can be logged in and used at the same time without kicking each other's session out.
187. Opening the same project folder again is detected, and DMS switches to the existing window for it instead of starting a duplicate service.

Tip: Besides switching to an existing project, the Project menu's Settings group also has Create New Blank Project, which starts a brand-new, empty project in a new folder at any time - no restart, and no need to go through the section 1.3 startup screen.

Note: Every normal quit (the red close button, the Quit DMS button, Cmd+Q, Dock right-click quit, and so on) records that project's path, so the next plain double-click launch's Continue with last project (section 1.3) points to it - if several project windows were open, “last” means whichever one you quit most recently.

17 Combining Another Project In

If the same material was organized separately on two computers (or by two different people), and you now want to merge it into one, you don't have to move files by hand - Combine Project automatically folds another independent project's folder tree and documents into the one you're currently using.

188. Click the Project menu in the header bar.
189. Under Import, choose Combine other sub-project...
190. In the dialog, click Add sub-project folder... and choose another independent DMS project's storage folder (you can add more than one).
191. Click Preview (no changes made) to see what the merge will do before committing, or skip straight to Combine.

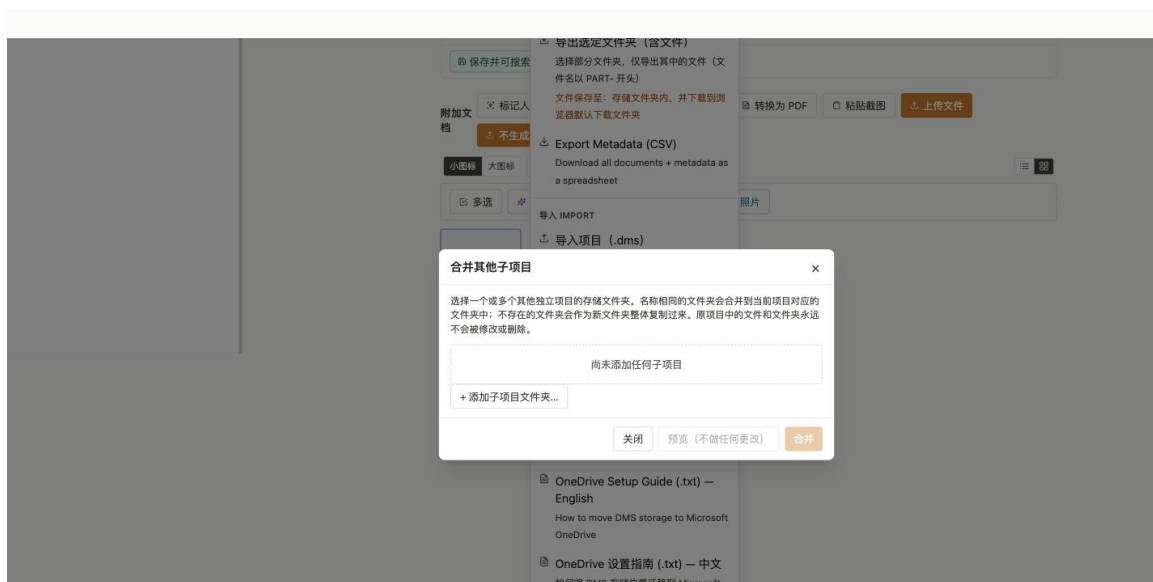


Figure 17-1 The Combine Other Sub-Project dialog

Merge rules:

- Folders with the same name are merged into the matching folder in the current project - you won't end up with two side-by-side folders of the same name.
- Documents that are byte-for-byte identical are automatically recognized as duplicates and skipped, rather than importing twice and wasting space.
- Files and folders in the original project are never modified or deleted - this is a one-way, copy-style operation, and the source project can keep being used independently afterward.

Tip: Good fit for: two computers (or two people) who each organized part of the same material for a while and now want one combined project; also useful for folding a small “inspection photos” side-project back into the main one.

18 Folder-Level “Ask AI”: Batch Document Q&A and PDF Export

Section 4.9 covers asking about a single document. To have AI read several documents in a folder at once to answer a question (“how much do these receipts add up to in total”), use the Ask AI button in the folder toolbar.

192. Select the target folder and click Ask AI in the toolbar.
193. The dialog lists every document in that folder (and its sub-folders) with a checkbox; check the ones to hand to the AI. The view toggle in the top-right switches between List / Small / Large / Extra-large thumbnails to help you see what you're picking - your choice of size is remembered for next time.
194. Type your request or question in the box below (or dictate it), then choose one of two paths:
 - Ask AI Now - the AI (Gemini or DeepSeek) reads the checked documents' content and answers, citing which documents it drew on; turning on “Let AI look at photos/scans” lets it directly “read” photos and scans with no text layer too (Gemini only, slower). This needs an API key configured first (section 6.4).
 - Build PDF (for tools like ChatGPT) - assembles the checked documents (photos annotated with capture date/location/notes, PDFs merged as-is) into one complete PDF, handy for copying or handing to an external AI tool like ChatGPT or Claude for further follow-up questions. This option needs no API key.

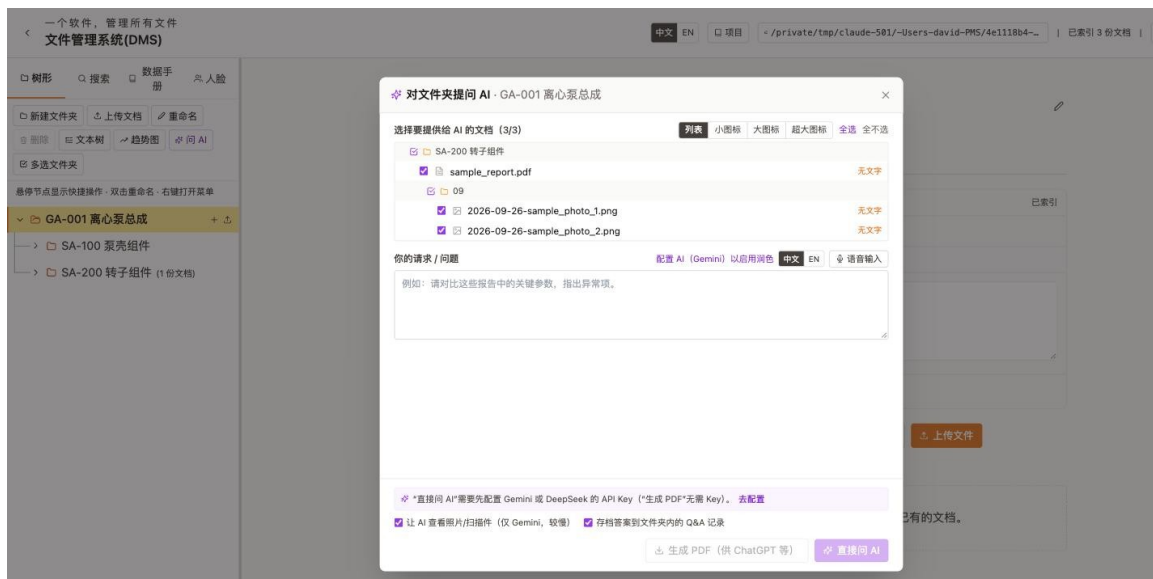


Figure 18-1 Asking AI about a folder: picking documents and choosing how to proceed

195. Checking “Archive the answer to the folder’s Q&A record” appends the exchange to a running “AI Q&A Record.pdf” in that folder, so it keeps building into a useful reference instead of being lost after you close the dialog.

Tip: Example: check all the receipts, bank statements, and last year's tax return in a "Tax Documents" folder and ask "about how much of a refund am I looking at this year"; or build a PDF and hand it to another AI tool for a second opinion.

19 Icon View: Pop-Out Window and Batch Actions

Besides the default list view, a folder's documents can be switched to an “icon view” (thumbnail browsing similar to a file explorer's grid mode), which can also be popped out into its own separate window.

196. In a folder's document area, click the icon-view toggle (the grid icon next to the list-view icon).
197. Switch between Small and Large thumbnails (an Extra-large size is available in the pop-out window only).
198. Click Pop Out to open the icon view in its own browser window - drag it to a second monitor, resize it freely, and it no longer takes up space in the main window.

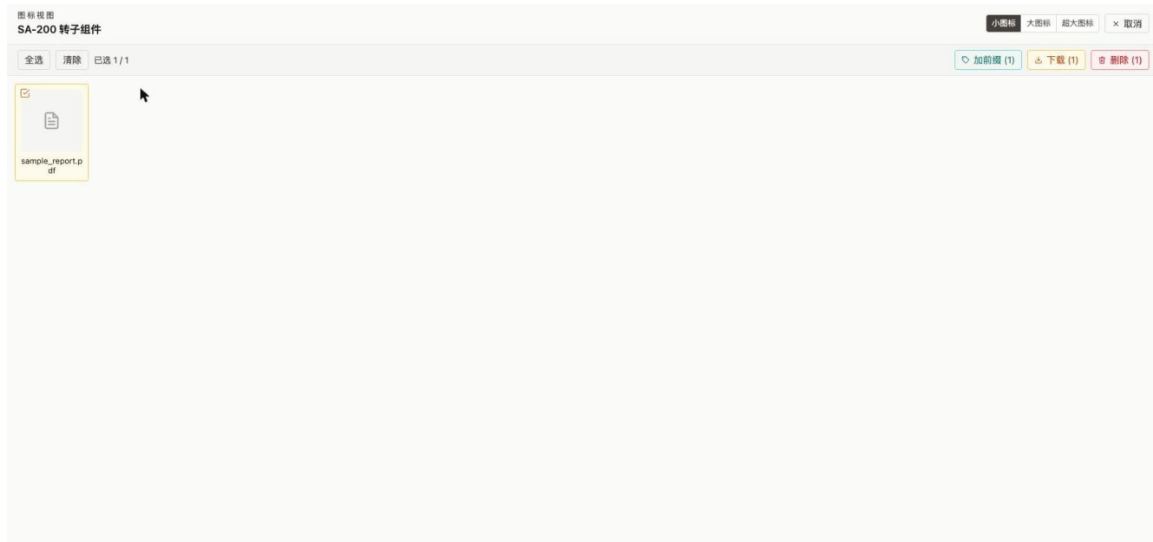


Figure 19-1 The pop-out icon-view window: multi-select mode allows batch download, delete, or prefixing

199. Click Multi-select in the top-right of the pop-out window, check some files, and then:
 - Download - downloads the checked files one after another.
 - Add Prefix - adds the same prefix to a batch of filenames at once (for example, appending a note after the date), a one-shot batch rename.
 - Delete - soft-deletes the checked files in bulk (moved to “Not Show in Tree” - section 3.2).

Note: The pop-out window talks to the main window through the browser's own tab-messaging mechanism; if it hasn't communicated with the main window for a while, reopening the folder in the main window may show the pop-out as “expired” - just click Pop Out again to open a fresh one. No documents are affected either way.

20 Troubleshooting

Problem	Solution
Windows SmartScreen blocks DMS.exe, or double-clicking does nothing	Click 'More info' then 'Run anyway'; if there's no response at all, the file is most likely blocked - see section 1.4 to unblock it.
macOS says 'cannot verify the developer'	Go to System Settings -> Privacy & Security, find the notice, and click Open Anyway.
Gemini says "API quota exceeded" (RESOURCE_EXHAUSTED / 429)	The free Gemini tier has daily (or per-minute) limits, and the message says roughly when it resets. Retry later, enable billing on the Google project, use another API key, or switch to DeepSeek (section 6.4); for translation you can use Fast (free).
The browser does not open automatically	Open your browser manually and go to http://127.0.0.1:8765 (or whichever port the console/log shows).
Browser shows 'this site can't be reached', or an action reports 'Failed to fetch'	Make sure the DMS background process is still running (a console window or tray icon on Windows; a menu-bar / Dock icon on Mac). Relaunch DMS if it has quit. If you just clicked Quit DMS, the server shutting down is expected.
Clicking 'Auto-install deepface' shows 'Installing...' for a long time	This is normal - installation runs in the background and downloading TensorFlow and related components can take ten-plus minutes on a slow connection. You can keep using the rest of the app; the button returns to normal automatically when done, no page refresh needed.
The OCR button is greyed out or says Tesseract is unavailable	Tesseract OCR is an optional component. On Windows, install it from the UB-Mannheim build; on Mac, run <code>brew install tesseract</code> , then restart DMS.
Chinese text is not extracted correctly	Install Tesseract's Simplified Chinese language pack (<code>chi_sim.traineddata</code>). See the Tesseract documentation.
GPS location shows as coordinates, not a city name	Reverse-geocoding needs an internet connection - check your network.
An uploaded file does not appear in the document list	Refresh the browser page (F5) - the file may have uploaded successfully even though the page didn't auto-update.
Can't find a document uploaded or deleted earlier	Use the Search tab to search by filename or content; a deleted document may be sitting in the 'Not Show in Tree' recycle-bin folder (section 3.2).
DMS quits immediately after launching	Make sure nothing else on your computer is using the port DMS wants (starting near 8765); restart your computer and try again.
Generating a databook or merged PDF fails,	Merging only supports PDF and image

or shows an 'Unsupported type' placeholder page	formats; save Word/Excel/PowerPoint files as PDF first, then upload and merge (chapter 9).
The storage folder has a lot of .dms files piling up	This is normal automatic backup behaviour (section 12.4); once there are more than 10, older files are archived into a 'Not Shown in The Tree' sub-folder automatically - the count doesn't grow forever.
Scan Barcode says 'no barcode detected in the image'	Make sure the barcode itself is sharp, unobstructed, and has a blank margin around it. QR codes shared as phone screenshots - especially ones with a logo in the middle or a background that runs to the code's edge, like a WeChat 'scan to join group' image - usually can't be read this way; see section 4.8.
A 'Transcribe Recording' or 'AI Cleanup' button shows 'Configure AI (Gemini)' instead	You haven't configured a Gemini API key yet. Click the link, paste your key when prompted, and save - see section 6.4.
Transcribing a recording produces no change, or reports failure	Make sure the recording actually contains clear speech (music, silence, or background noise alone is reported as 'no speech detected'); an 'UNAVAILABLE' or high-demand error usually means the Gemini service is temporarily busy - retry shortly.
'Continue with last project' is greyed out at startup	There's no recorded normal-quit yet (first run, or the process was force-killed last time) - use Select a project... or New project... instead; see section 1.3.
The pop-out icon-view window shows 'this window has expired'	Go back to the main window and click Pop Out again to open a fresh one - this is the normal expiry of a one-time handoff token between the two windows and doesn't affect any documents.
After combining a project, a folder has fewer documents than expected	Byte-for-byte identical documents are recognized as duplicates and skipped by design; to keep both copies, rename or slightly modify the document in the source project before combining - see chapter 17.

Getting Help

If you encounter an issue not listed above, please contact the application developer with:

- A description of what you were doing when the problem occurred.
- Any error message shown on screen.
- Your operating system version (e.g. Windows 11 or macOS 15).

Quick Reference Card

Task	How
Create a new folder	Select parent -> New Folder -> type name -> Enter
Upload documents	Select folder -> Upload Files / Upload (no year/month folders) -> pick files
Paste a screenshot	Select folder -> Ctrl+V / Cmd+V, or click Paste Screenshot
View a document	Click the document name
Run OCR on a document	Open viewer -> Extract Text (OCR) -> Save & Make Searchable
Search all documents	Click Search tab -> type keyword
Save a folder's website login	Pencil icon -> Login Credentials -> fill in site/account/password -> Done
Generate a combined PDF (databook)	Databook tab -> check documents -> Generate Databook
Merge files into one PDF	Select folder -> Merge Documents -> select files -> Merge
Tag faces in photos	Tag Faces -> check photos -> detect -> name each face
Send a document to a phone	Document card -> send-to-phone icon -> enter number
Receive files from someone else remotely	Desktop launcher -> Remote Upload -> they scan the QR code
Move a folder	Drag and drop the folder to its new place in the tree
Set a serial number	Pencil icon on folder -> enter SN -> Done
Export index / full / selected backup	Project menu -> Export Index / Full / Selected Backup
Export metadata as CSV	Project menu -> Export Metadata (CSV)
Set a password	Project menu -> Set Password
Set up email sending	Project menu -> Email Sending Setup
Dictate a description into a folder/document	Description panel -> Voice Input -> pick Chinese/EN -> speak
Transcribe an uploaded recording into a description	Description panel -> Transcribe Recording -> pick a file
Clean up / polish a description with AI	Description panel -> pick a mode -> Clean up with AI -> Apply
Save a description as an updatable PDF	Description panel -> Save as PDF (click again after editing to update the same file)
Scan a barcode/QR code in a photo	Open image viewer -> Scan Barcode
Unblock a Windows 'blocked' file	Right-click DMS.exe -> Properties -> check Unblock -> Apply -> OK
Continue with the last project / start a new blank one	Double-click DMS.app / DMS.exe -> pick the matching button in the startup window
Combine another project in	Project menu -> Combine other sub-project... -> add folder(s) -> Combine
Ask AI about several documents in a folder	Folder toolbar -> Ask AI -> check documents

at once	-> Ask AI Now
Batch-convert images/PDFs into individual PDFs	Select documents -> Convert to PDF -> confirm
Pop the icon view out into its own window	Switch to icon view -> Pop Out
Multi-select folders to delete/download in bulk	Tree toolbar -> Multi-select Folders -> check -> Download/Delete
Chart a parameter's value over time	Select folder -> Trend Chart -> pick a parameter -> Save Snapshot
Auto-generate a Word databook from a folder	Databook tab -> Auto-generate by folder (Word) -> check a folder
Configure a Gemini / DeepSeek API key	Any 'Configure AI' link -> paste key -> Save