

eDocs

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Sergio Ramazzina
Email: sramazzina@tiscalinet.it

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Revision History

DATE	DESCRIPTION	AUTHOR
15/09/2002	FIRST DOCUMENT'S DRAFT RELEASE	SERGIO RAMAZZINA
23/09/03	MADE SOME CORRECTION AND CLARIFICATIONS AND ADDED ARCHITECTURE SECTION	SERGIO RAMAZZINA

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1. The vision

Organizations today are generating documents with increasing velocity, and gaining control over information isn't optional. Another reality is that without documents, there is no business traffic. Period. Harnessing the means, mastering the method to manage all your eBusiness documents efficiently while integrating them into the relevant business process.

With requirements to boost productivity and corporate competency while fostering information sharing, companies are imperiled if they don't adopt a framework to catalog, manage, and share documents across the corporate enterprise and beyond to customer, supplier, and partner constituencies.

Without the appropriate tools, content stores are islands of information where employees are often privy to only the documents they create themselves. Searching across departments and offices can be a daunting if not impossible task. As a result, documents are continually reproduced and recreated, knowledge is forever lost, and costs climb ever higher.

2. Key benefits

The main benefits that will come implementing a Document Management solution are:

- Improves quality and boosts productivity by ensuring that the documents users access have been properly reviewed and approved
- Enables compliance and promotes good business practices for organizations operating in a highly regulated environment
- Improves overall operational efficiency and facilitates collaboration among all users, including remote employees and external suppliers and partners
- Lower documents access and retrieval time enabling immediate response.

3. What is eDocs

eDocs is an Enterprise wide document management solution that provides unified secure document access to every employee, customer or partner.

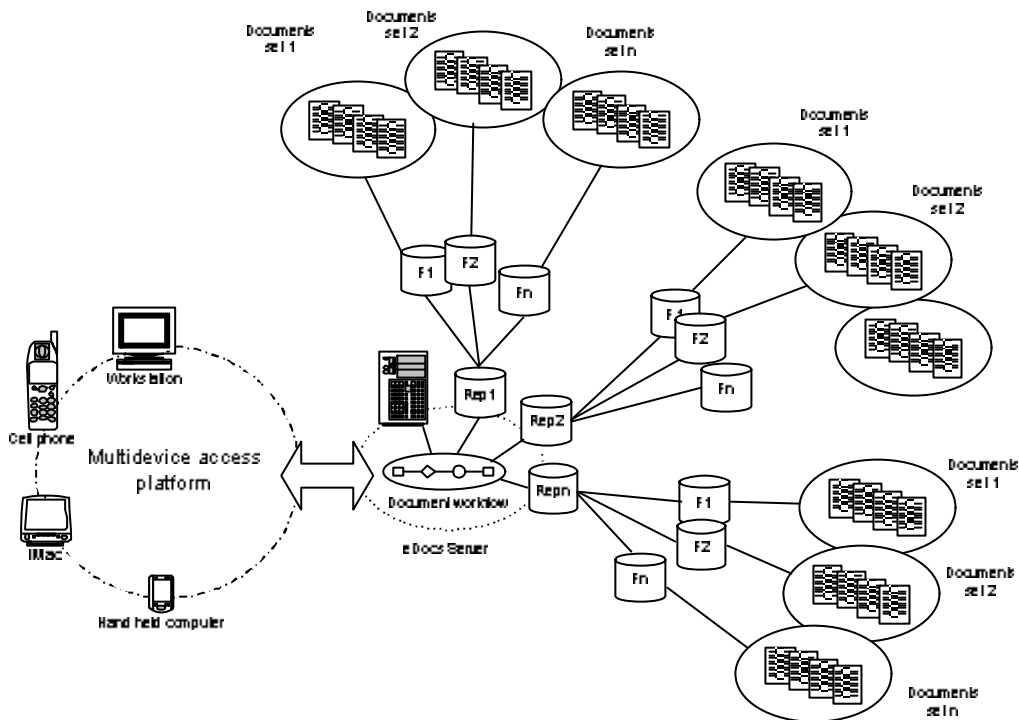
3.1. Key features

- Fully standard J2EE application.
- Distributed archives strategy to enable more flexibility in the documents storage management.
- Unified single point of access to every document in the repository via intuitive web interface.
- Integration with the most popular office tools (Microsoft Word, Excel, PowerPoint, others) via web services integration.
- Robust security mechanisms based on user groups and roles to protect enterprise documents.
- Web links protected with SSL and digital certificates.
- Workflow automation to handle all the document lifecycle phases such as review, approval, and publishing.
- Comprehensive Version & Revision Control.
- Full text searching.

4. Product overview

4.1. Architecture

The following figure gives an high level view of the product architecture.



4.1.1. Document management strategy

eDocs stores document using an hierarchical storage allocation mechanism based on *Repositories* and *Folders*. These gives you the ability to group, under a single repository, a certain number of folders each one containing a certain number of documents and, may be, each one placed either on a different disk on the same computer or on a different computer with the same OS platform or on a different computer with different OS platform.

An example could be a repository called “*Sales department documents*” made up joining these three folders

- a folder called “*ERP Sales*” that points to a unix directory,
- a folder called “*Prospects*” that points to another directory of the same unix system,
- a folder called “*Hot opportunities*” that points to a directory on a Windows system.

Basically an eDocs system could have a lot of repositories each one with its own set of folders, located on every platform, and each one with its own set of documents.

4.1.2. Security and access control

Two types of permissions can be assigned in the system:

- *Access permissions*: specifies what repositories, folders and documents can be accessed
- *Actions permissions*: specify what a specific role can do on a specific document.

Access permissions are assigned to users and groups. Every user that has been joined to a specific group inherits the access permissions assigned to that particular group. Moreover it's also possible to override permissions for specific users assigning further permissions as well as those assigned them by his group.

Action permissions are strictly related to user's roles and are assigned by the system to every role in the system.

4.1.3. Workflows

The document lifecycle is governed by a customizable workflow that gives high control over every phase of the editorial process.

Administrators can design their own workflows to address all the issues from creation, to the publishing of the document, going through the revision and approval processes.

Different workflows can be assigned to different groups giving more flexibility to the entire process. Moreover messaging functionalities help to maintain a higher degree of collaboration during the process.

In the first phase of the product, publishing workflows are designed with XML files that are read and interpreted by the workflow engine. In future releases a graphical user interface will be available to simplify this process.

4.1.4. Repository backup and restore

Administrators has the possibility to backup and restore repositories to obtain a higher degree of system's reliability. The restore operation will completely delete existing documents substituting them with the same contained in the backup we're going to restore.

4.1.5. MS Office integration

We would like to have tight integration with MS Office products and Windows Explorer using web services interfaces. With specific plug-ins users will be available to interact with every functionality of the eDocs system in seamless mode. We think that Office and Windows Explorer integration could be one of the product's winning drivers.