



onGO DMS

Introduction to
the technical
and functional
concept

General Features

- Server based storage of documents and metadata
- Scalability of system from small to large installations
- Powerful search functions, including contents of the documents
- Access to documents from MS Windows clients and by Internet Browser, from LAN or Internet
- Platform for integration into other applications incl. Web-Portals by means of server-API or client-API



Documents

- The DMS can store any file format and file sizes.
- Version Management keeps the previous versions of a document available. It can be configured how many of the previous document versions shall remain in the DMS, and if the older versions shall be deleted or stored in an archive system.
- The Version Management distinguishes between draft versions and published versions.
- The Version Management tracks user actions in a protocol.
- For each individual document the Version Management can be activated.

Metadata – Standard Attributes

- title
- description
- file format
- document class
- document ID
- date of creation
- creator
- owner
- document status
- document availability
- version number

Metadata – Custom Attribute Types

The following custom attribute types are available

- Text: any string up to 250 characters
- Number: any integer number
- Date
- List: selection list of predefined values

Custom attributes can be created only by the DMS-Administrator, but can be added to the documents by the users.

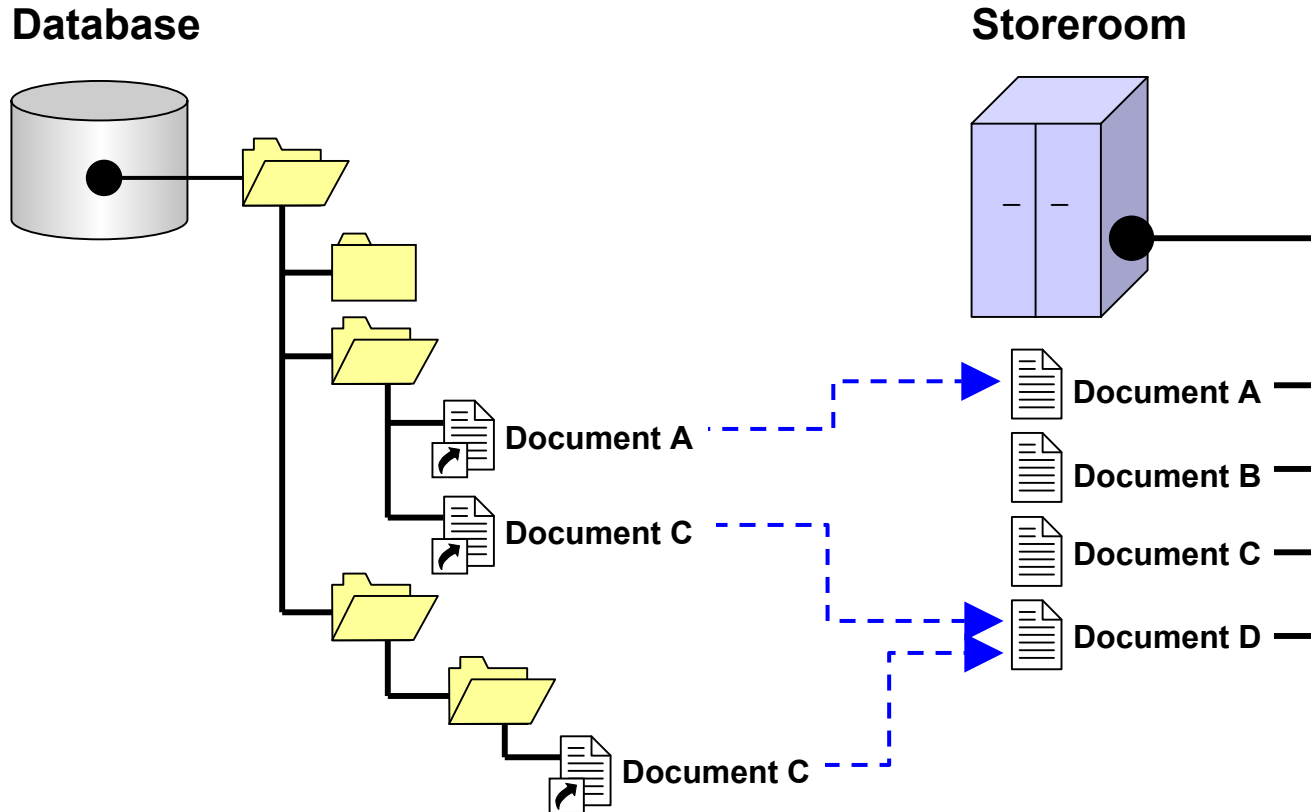
Each document and folder can have an individual set of attached custom attributes.

Metadata – Custom Attribute Types

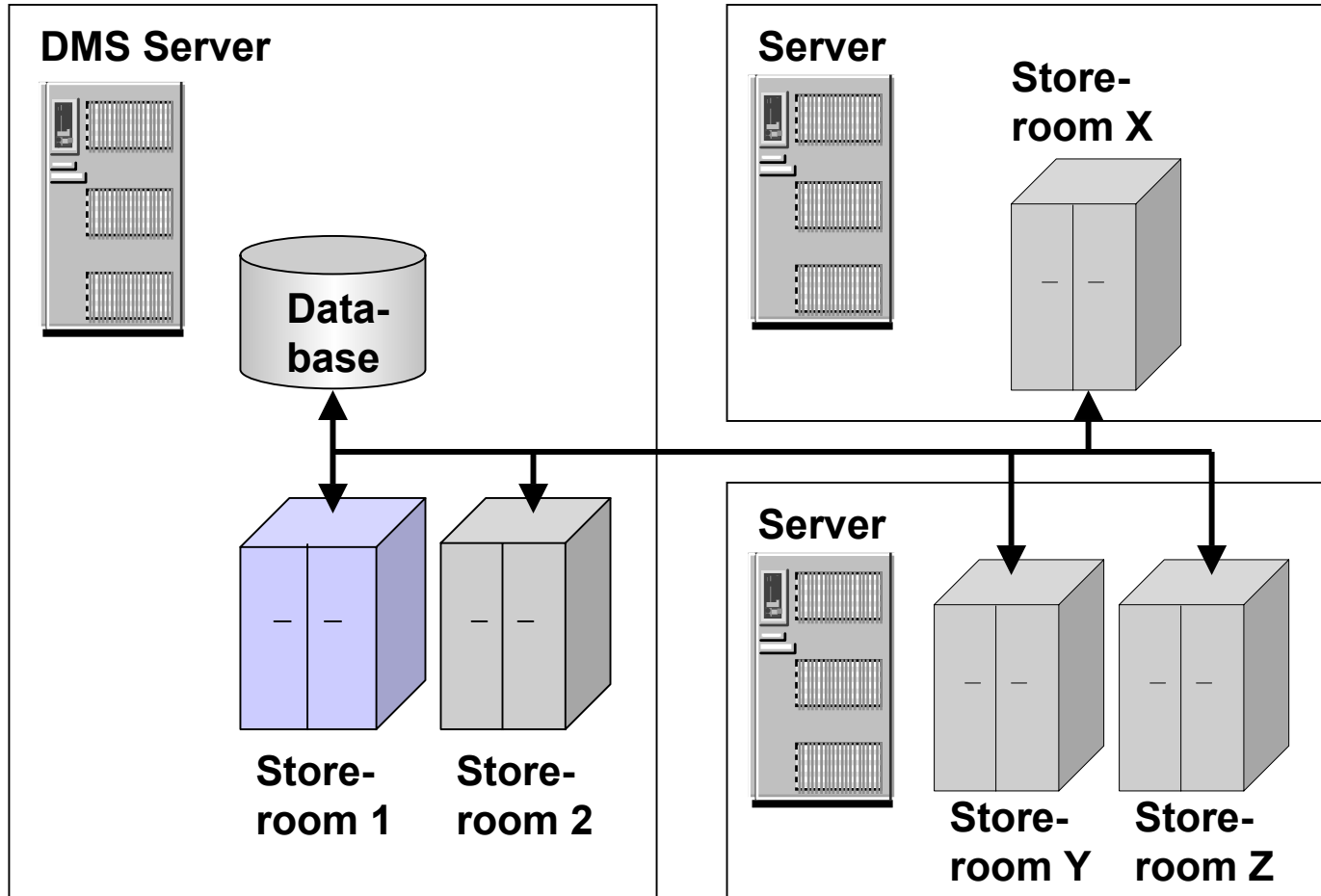
Examples for Custom Attributes

- Invoice number
- Invoice date
- Invoiced costs
- Address
- Processing status: open, finished
- Index of a database record
- Flag for process automation

Data Storage: Storage of Files in the Storeroom

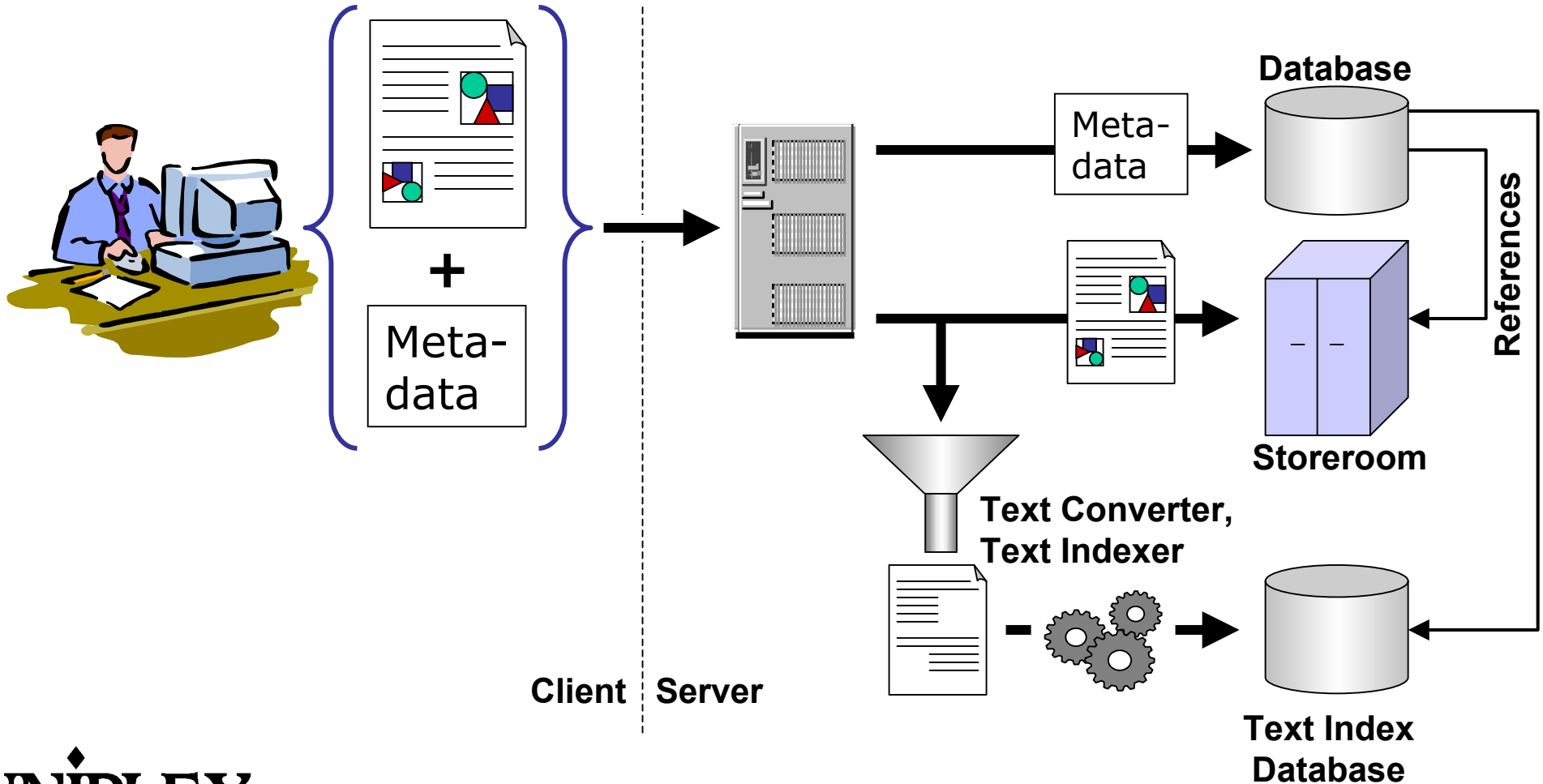


Data Storage: Multiple Storerooms



Data Storage:

Storage of Files, Metadata and Text Index



Search for Documents through Metadata



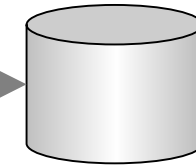
Standard Attributes:

- Title
- Description
- File format
- Document type
- Document ID
- Owner
- Doc. Status
- Doc. Availability
- Version

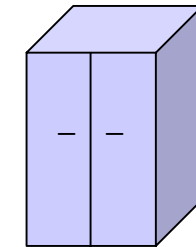
Custom Attributes:

- Invoice number
- ...

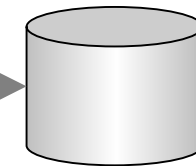
Document Contents



Database



Storeroom



Text Index Database

References

Search Result



Document

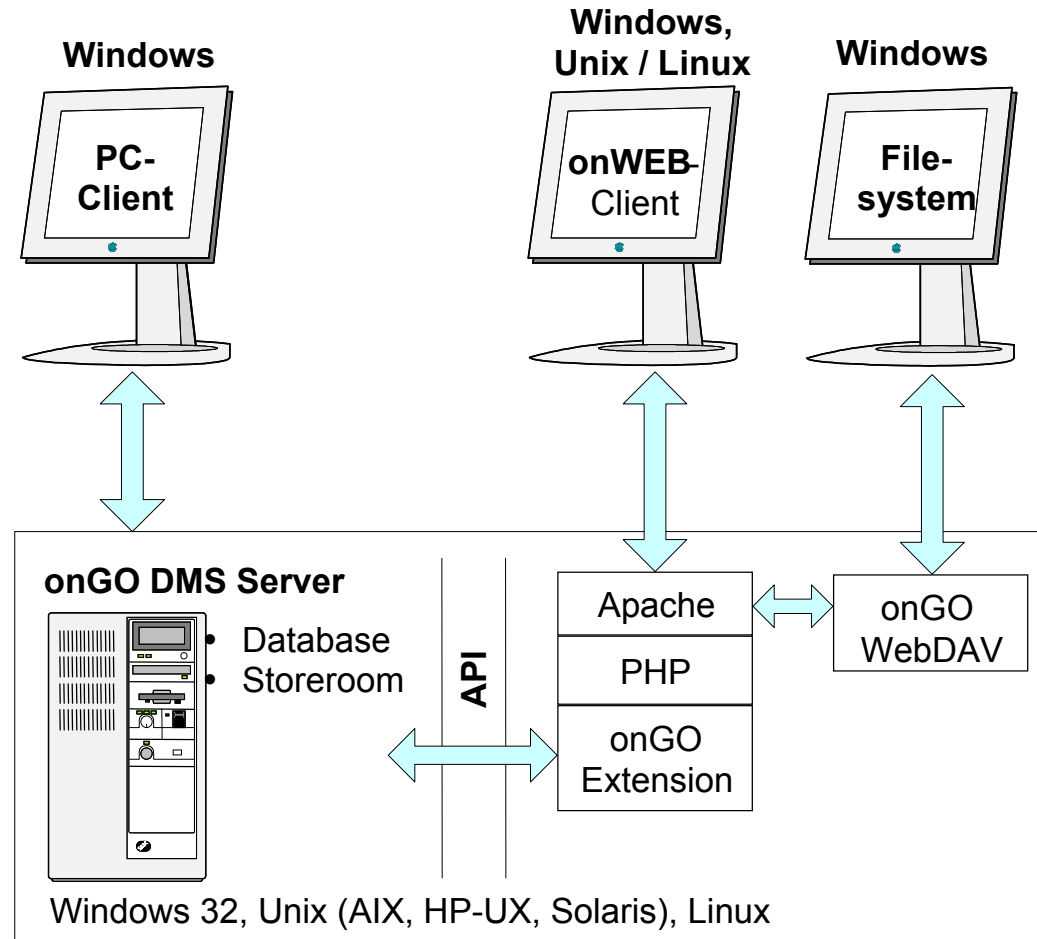


Document



Document

System Architecture



Server platforms

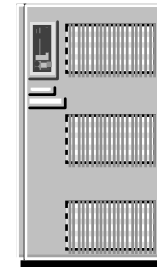
	MS SQL 6.5	MS SQL 7.0	MS SQL 2000	SyBase 10	SyBase 11	Oracle 8i	Oracle 9i	MySQL
MS Win NT 4.0	●	●	●			R5	R6	R6
MS Win 2000	●	●	●			R5	R6	R6
MS Win 2003	R6	R6	R6			R6	R6	R6
AIX 4.3				●	●	R5	R6	R6
AIX 5.1				(X)	(X)	R5	R6	R6
HP-UX 11.x				●	●	R5	R6	R6
Solaris 2.7				●	●	●	R6	R6
Solaris 2.8				(X)	(X)	●	R6	R6
Solaris 2.9				(X)	(X)	●	R6	R6
Linux				R5	R5	R5	R6	R6

- = onGO DMS 4.1
- (X) = available on demand
- R5 = onGO DMS 5.0
- R6 = onGO DMS 6.0

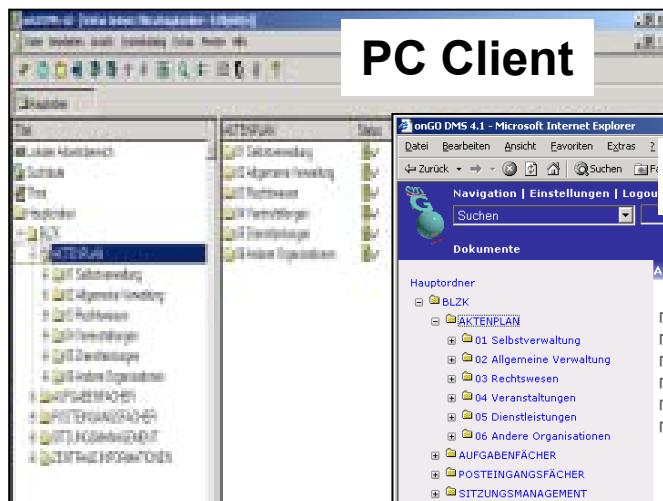
DMS Clients

- **PC Client:**
 - Windows 32bit client
 - Installation on PCs or on a Terminal Server
- **onWEB Client:**
 - Internet Browser client
- **onGO WebDAV Module:**
 - Access from MS Windows file system through web folder.
 - With special software the web folder can be mapped to a drive.

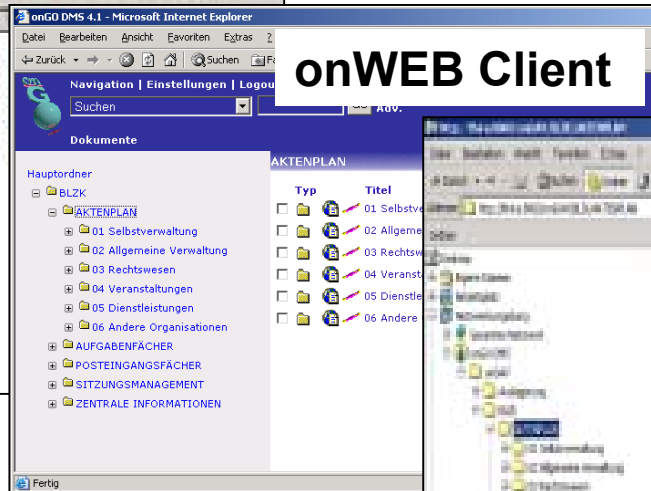
Clients – simultaneous access



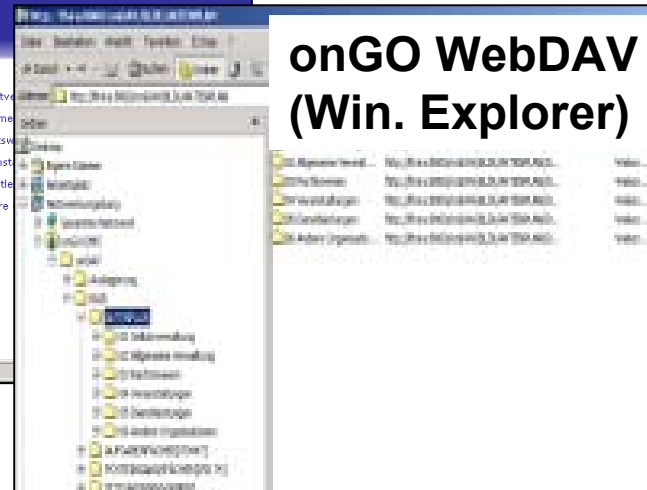
onGO DMS
SERVER



PC Client



onWEB Client



onGO WebDAV
(Win. Explorer)



Functional Concept of onGO DMS

- Users and usergroups
- Access rights
- Event messages
- Task lists
- Approval management
- Property sets
- Document classes



Users and Usergroups

Users:

- The access rights are defined at each individual document for each user.
- The number of users is unlimited.
- The DMS uses the special user types „administrator“ and „sa“ (system administrator) for administrative tasks.

Usergroups:

- Usergroups can be used to ease the administration of access rights.
- A user can be member of multiple usergroups.
- The number of usergroups is unlimited.



Access Rights

The following access rights can be set at each document/folder per user/usergroup:



- **Read:** Document / folder is visible, document can be opened (read-only).
- **Write:** Document / folder incl. Metadata can be modified.
- **Delete:** Document / folder can be deleted or archived.
- **Link:** Document / folder can be linked (i.e. unlinked) with other documents / folders.
- **Grant:** Access rights at document / folder can be modified.









Access Rights - Links

- One object (document/folder) can have multiple parents. This concept is different to the usual concept of file systems !
- A user must have „link“ access rights to both objects to set a link or to break a link.
- The following „parent-child“ combinations are possible:
 - folder – folder
 - folder – document
 - document – folder
 - document – document






Access Rights - Example

DMS – Users:




-  Bone
-  Cross
-  Hayes
-  Jones
-  Miller
-  Smith

DMS-Usergroups:







-  Managers
(Bone, Miller)
-  Sales
(Bone, Cross, Hayes)
-  Accounting
(Jones, Miller, Smith)

Contract ABC.doc

Access rights at the document

	Read	Write	Delete	Link	Grant
 Managers	✓				
 Sales	✓	✓		✓	
 Jones	✓			✓	

Resulting access rights:

 Bone	✓	✓		✓	
 Cross	✓	✓		✓	
 Hayes	✓	✓		✓	
 Jones	✓			✓	
 Miller	✓				
 Smith					



Document – Creator and Owner

With each document/folder the creator and the owner is stored in the metadata.

Document – Creator:

- Creator is the DMS-user who created the first version of the document.
- The creator can not be replaced by another user.
- The information about the creator has no functional side effects.

Document – Owner:

- The owner has all access rights at the document/folder.
- The owner can be replaced by another user.



Event Messages



- With event messages users receive information about changes at a specific document or folder.
- The messages are broadcasted either by e-mail or by the messaging system of the DMS.
- Each user can set his personal configuration for event notifications on each document / folder to which he has at least "read access rights".
- A list of users and events can be predefined in a → property set.



Event Messages



Messages can be triggered by the following events:

- Lock of a document by check-out
- Document becomes available
- Document gets new link
- Document is marked for archiving
- Document is marked for deletion
- Document is published
- Modification at child document/folder



Task lists

- The task list of a document is a tool for a linear workflow.
- In the task list the sequence of the DMS-users, their task and the schedule is set.
- The users find their tasks in task list box of the DMS. After they have completed their task, the task is automatically forwarded to the next user of the task list.
- While the document is handled by the task management to document is locked against changes by other users.



Approval Management

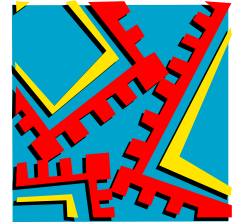


- For each document with activated
→ Version Management, the Approval Management can be used for the publishing of documents.
- The Approval Management lets a user change a document from status “draft” to status “published” only when a preset group of users give their approval within a certain number of days.



Property Sets

- Property sets are templates defined by the DMS-administrator with include:
 - Configuration of the access rights
 - Configuration of the task list
 - Configuration of the approval list
- Property sets can be used when a new document / folder is created.
- Property sets are templates which copy it's contents to the new documents/folders. They are not linked to the document. Users can change the settings on the documents/folders. Changes on a property set have no effect on existing documents.



Document Classes

- Document classes are needed for the categorisation of documents and folders, e.g. quotation, invoice, contract, HR document, notice, etc.
- Document classes can define:
 - the life cycle
 - a set of custom attributes
 - a property set
 - a document template
 - approval management configuration