

Document Management Tools from

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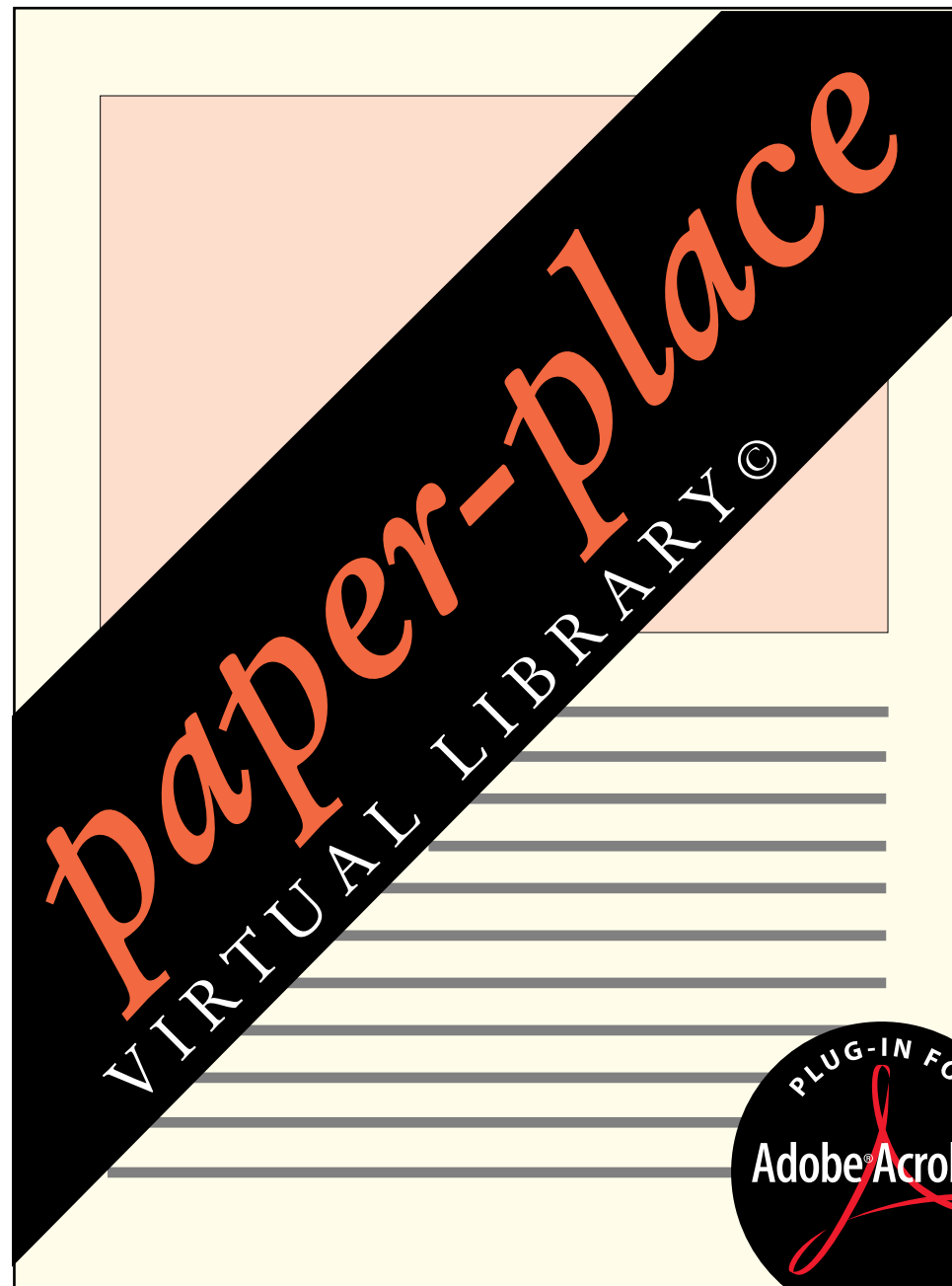
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Getting the best out of Document Management

As companies move towards electronic document management (EDM), users have to develop new skills and accept new disciplines.

In order to reap significant benefits from EDM, users have to be confident in their grasp of the technology and experience the benefits as early as possible. Without a high level of user acceptance there will be no benefits.

We believe progressive implementation is the best way to guarantee success and have designed *paper-place* accordingly. The base level product is a framework which can grow and adapt to changing needs.

A modular approach to software design means that new functionality can be added without major re-programming. The implementation described here can be up and running very quickly and can then be developed further as users' requirements become evident.

Overview

paper-place is an EDM system based on PDF and Adobe® Acrobat™ technology. It is designed for use over a Windows network and was developed with experience of the needs of real companies.

PDFs - the feedstock of the system - are produced, by a process similar to printing, from any authoring application such as Word, Powerpoint, Excel etc.

From paper documents, PDFs are produced by scanning and using the Acrobat Capture functionality to read

the text and replicate the graphics and formatting. It is then the users' responsibility to log documents into the system. Once logged, a customised interface in the Acrobat viewer provides access to the document information, search and distribution facilities.

Database

At the heart of the system is a database that maintains essential information about all documents and all users of the system and also carries out a general housekeeping role.

This database is a resource in its own right, capable of generating reports and implementing global functions such as archiving.

The choice of database may be dictated by the system your company already uses. If you have no database system, the choice is wide open since *paper-place* can communicate with a wide range of database servers using ODBC.

Hardware requirements

Hardware requirements vary according to the size of the implementation but an absolute minimum would be a single Pentium based machine running Windows 95 or NT 3.5 with 32 Mb RAM and a 1Gb drive for storage.

A scanner is required if paper documents are to be brought into the system. The choice of scanner depends on the size and throughput of documents.

Storage requirements depend on the overall throughput of documents and the rate at which older documents are archived to removable media such as CD-ROM. Clients of the system need only a typically specified Windows machine.

Cataloguing documents

paper-place provides a degree of structure for the organisation of your virtual library but it is important to note that this structure can be adapted to your particular needs or even be completely redesigned if necessary.

The example system discriminates documents initially by department. When a user logs a document it is marked as belonging to a DEPARTMENT. This is just a convenient description and department could easily be replaced by PARTNERS or PROJECT or CONTRACT. It is simply a way of recognising the largest scale of granularity in the organisation of documents. Users of the system are also considered as belonging to a particular department.

Beneath this level are two further discriminators. Here, we have used DOCUMENT TYPE and DOCUMENT SOURCE. These categories should reflect real distinctions in the organisation. They should also reflect what is acceptable to users of the system. Too many sub-divisions will prove cumbersome and confusing; too few will not make the most of the facilities for searching and controlling access to documents.

The subsidiary discriminators also act as a way of simplifying the logging of documents. When a document type is chosen from the list box, only those types appropriate to the department are available.

Similarly, document sources form sets which can differ from department to department. When logging, users select from the sets of types and sources which are defined for their department. Because users are only choosing from selective lists, the logging process is very quick and efficient.

Other information will usually be added to the document.

Most organisations will have a REFERENCE NUMBER to identify documents. This alone can carry information which is very useful in document searches. Date information such as a RECEIPT DATE or a DEADLINE FOR ACTION can also be logged.

paper-place VIRTUAL LIBRARY document information

Main Index
D - Technical Documents

Title
Acrobat Viewer Plug-In API On-line Reference

Abstract or Keywords
Acrobat Exchange Reader Toolkit PDF Plug-in API

Ignore

Original format

Document path:
C:\ACROBAT\DOCS\TECHDOCS\Wwrpiref.pdf

Catalogue Information
Receipt Date: 27-05-1999
Doc Date

Doc Ref

Sub Index
D1 Technical Query Sheet

Document Type
Reports

Archive Date

Read Only

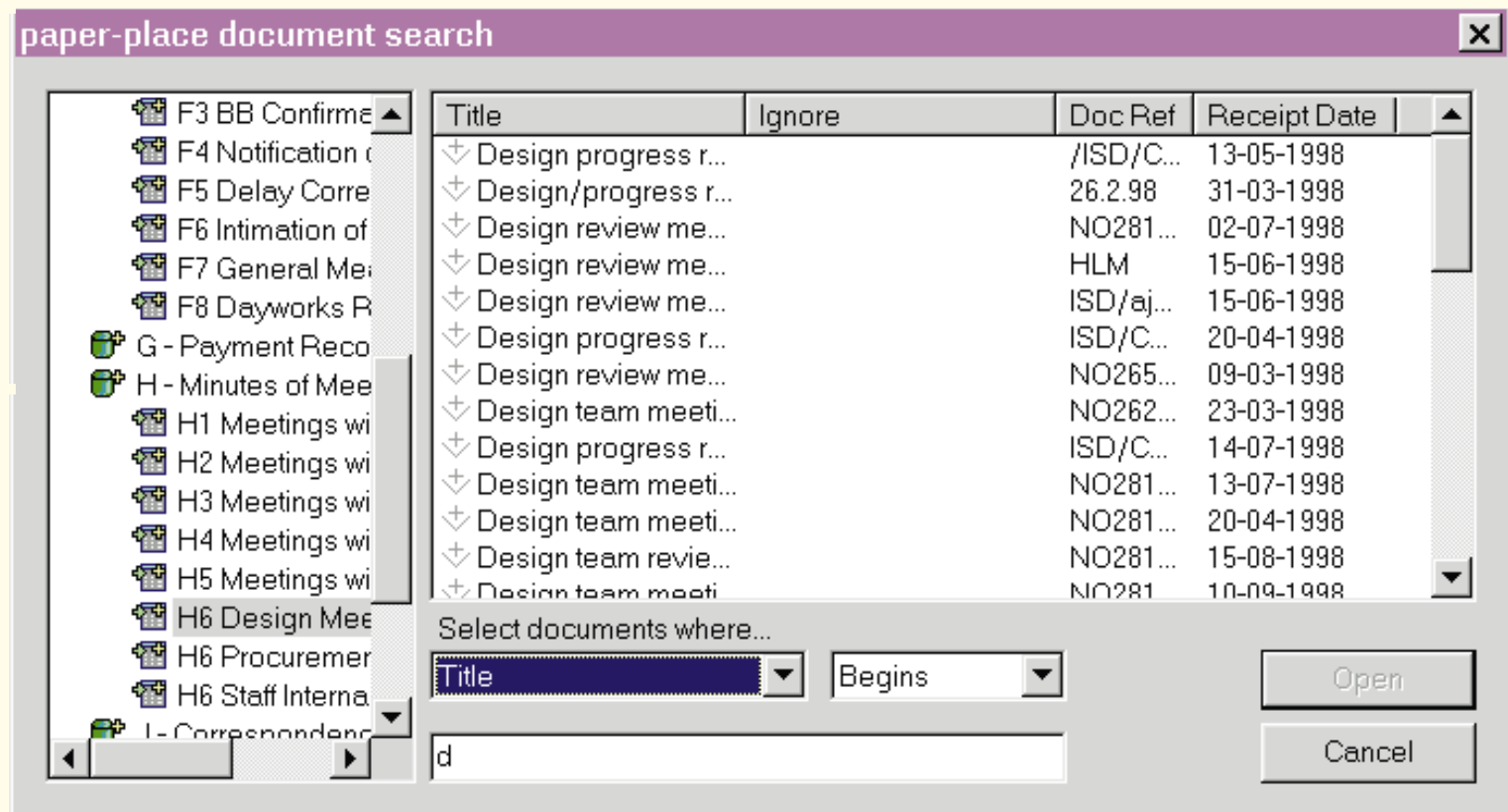
Scan... Capture Log Document Search...

A document will normally be given a TITLE which helps users to recognise it and KEY-WORDS or an ABSTRACT can usefully be added. All this information can be entered quickly and efficiently through the custom designed user interface.

Searching for Information

The easiest way to find documents is to use the live search facilities to query the database. Documents can usually be found using a few keystrokes or mouse clicks.

If the information fields don't enable a document to be found easily, the Acrobat Search Engine can be used to search for particular text and rapidly return all documents that contain the search string.



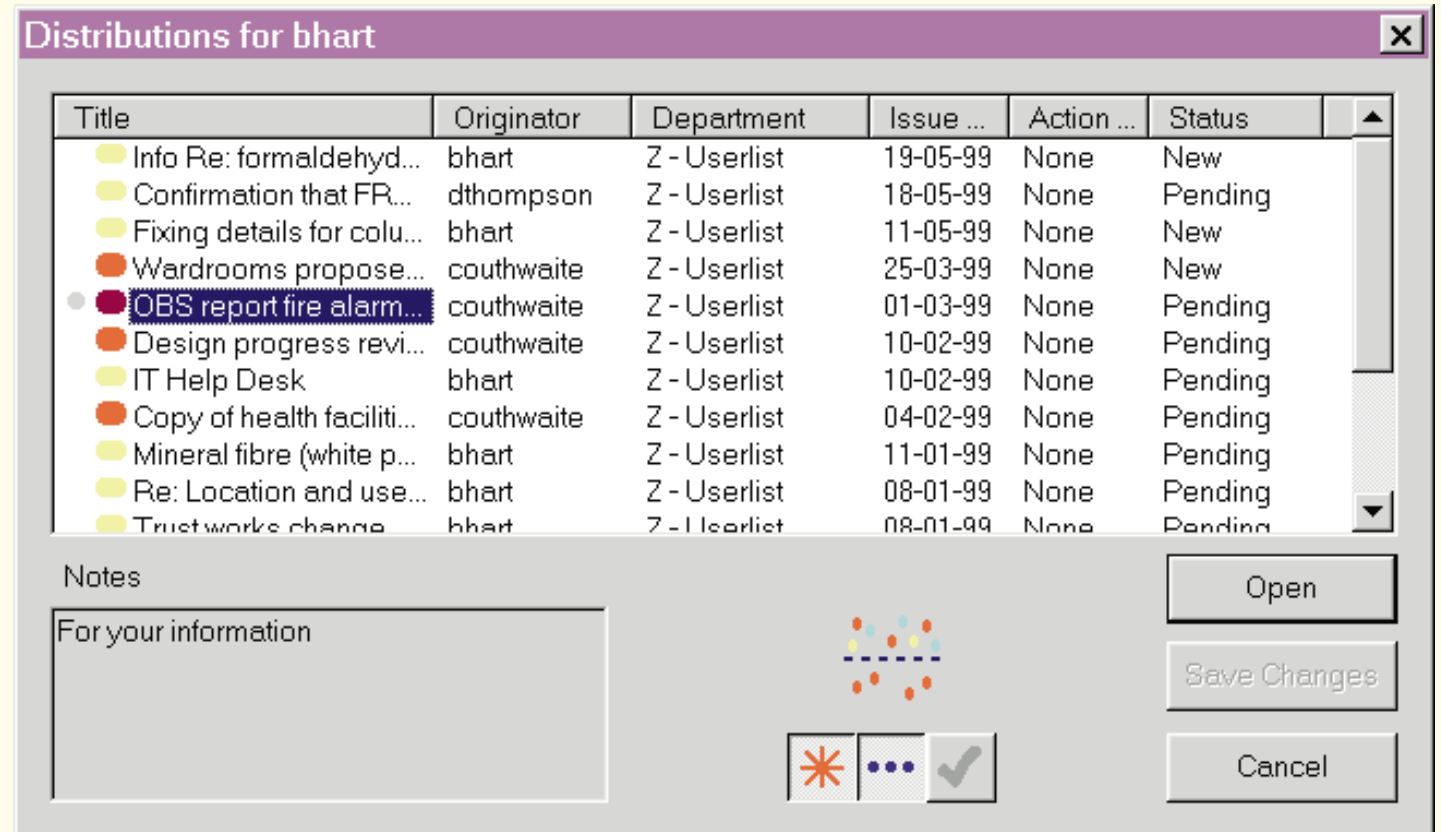
Distributing Documents

A distribution facility is built into the system.

This allows users to mark documents for the attention of other users.

Any user has only to click a button in the Acrobat viewer to see a list of documents needing their attention.

Another click and the document is open in front of them. Making new distributions is also very straightforward; users may be members of a number of groups so it is a simple matter to distribute a document to a particular set of users.



User organisation

The highest access level is that of ADMINISTRATOR. There will usually be only one administrator for a particular site. At this level the system can be configured for use; user interface names defined; new departments added; new users accepted into the system and their access rights defined; new document types added for departments and so on. These functions and other general housekeeping tasks are carried out through an interface to the database.

The next level is that of DOCUMENT MANAGER. Such users are considered as

belonging to a particular department. They may log documents into particular departments and distribute documents or conduct searches if these rights have been granted by the administrator. These functions, together with searches, are carried out in the environment of the Acrobat viewer.

The general user, referred to as a READER, has only viewing and searching access to the system and perhaps distribution rights. These may be granted for one or several departments as defined by the administrator.

“Linda,

Can you find me the CV
which came in on Monday
from Portman...

then copy that bid
proposal to all regional
managers – we need their
response by return ...

and don't forget to get the
last three years' annual
reports to our office in
Hong Kong.

Oh and bring me the files
on Alfredo Garcia...”

“Right away, Mr Jones.”

