

# eDocNet Electronic Document Management System



**Solution By: Octaware Technologies**

**[www.octaware.com](http://www.octaware.com)**

**Microsoft Partner**

Gold: Collaboration and Content  
Silver: Application Development  
Silver: Cloud Productivity  
Silver: Communications

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## **Electronic Document Management System (EDMS)**

- Fully Web-based DMS
- Easy-to-Use UI
- Easy Version Control
- Centralized Storage of Documents
- Enables Collaborative Work Ecosystem
- Automated Workflows
- Role-based Security
- Supports major File Types
- Fast & Easy Content Search
- Document Edit Alert
- Auto-Feeder
- Content Relationship

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# 1 About Octaware Technologies

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Octaware Technologies is a global software development and information technology company with offshore development centers in India and offices around the world in countries like USA and Qatar. Combining proven expertise in technology, and an understanding of emerging business domains, Octaware delivers a range of services & products including,

Products	Services
» PowerERM	» Custom Software Development
» iOnAsset	» Enterprise Portal
» Hospice	» ERP & CRM Implementation
» RealWin	» Consulting Services
» eDocNet	» Mobile & RFID Solutions
» eQuire	» Cloud & Infrastructure Services
	» GIS Services

Octaware Technologies positioned as one of the emerging Software Services and product companies in various areas of application development, maintenance & Support, Portal Technologies, CRM/ERP implementation, RFI/GIS and CAD Services etc. For details please visit our web site @ <http://www.octaware.com/>

Our products provide comprehensive security-protecting the privacy and integrity of the data while increasing the productivity and the efficiency of the processes. Octaware Technologies offers high caliber products with a bid to provide locally developed solutions, which are pragmatic and user-friendly. We engineer and design reliable products and services to help businesses and communities thrive and perform better. We focus on creating value by understanding our customers, working side-by-side to develop solutions that make our customers, experience technology which are simple and manageable. Octaware is one of the world's leading software companies, providing solutions to the world's largest and most successful businesses. The company is focused on making technology and its benefits accessible to all. Octaware has combined its ingenuity, engineering prowess and customer focus to help people around the world apply technology in meaningful ways to their businesses, communities and to their lives. Octaware utilizes the power of innovative positioning technology to provide real business benefits through radio-frequency identification. Octaware fueled by its fresh thinking and unique ideas creates more valued experiences with technology.

## **2 Preface - Electronic Document Management System**

Businesses today, are confronting with tremendous increase in number of documents that needs to be handled in order to manage their operations seeking efficiency in the processes and productivity in their people. These organizations are continually in pursuit of a system that can manage these large volume of papers amidst a variety of problems like storage space for retaining documents, labor-intensive operations for document management, etc.

Electronic Document Management Systems (EDMS) are such applications that handle these situations by way of digitizing paper documents and storing all records electronically by capturing, storing, managing & tracking files & records digitally.

### **Benefits of EDMS**

- **Easy & Instant Access**  
Search & retrieve from a pool of millions of documents from anywhere within an organization.
- **Better Version Control**  
Improves document versioning that tracks changes in the document and ensures that full history of document is available.
- **Collaborative Work Environment**  
With the use of web-based document management systems and automated workflows collaborative ecosystem is enabled within the organization.
- **Improved efficiency & productivity**  
Swift & easy document tracking improves efficiency & productivity of the employees.
- **Increased Document Security & Control**  
With document security & control a role-based access to documents can be created enforcing security throughout the organization.
- **Reduced Costs of Document Management & Archiving**  
Due to record retention policies for regulated content archiving these can be very expensive. With EDMS this can have significant improvement by reducing storage space, labor for archiving and thus reducing overall operational costs.

- **Improved Search & Knowledge Management**  
Finding documents & information becomes easy with EDMS, improving decision making and reducing the time taken to search that information.
- **Regulatory Compliance**  
Features such as audit trails, backup and security assist organizations in complying with new regulatory compliance laws.
- **Digital Paperless Ecosystem**  
Scanning your files to digital will enable your organization to go paperless, reducing storage space & related expenses significantly.

## 2.1 eDocNet - Electronic Document Management Solution

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eDocNet is an effective document and content management solution utilizing Microsoft SharePoint 2013 with some of the key features like Document Workflow, Document-Auto Feeder Scan, Document Search/Retrieval, Document fax-integration as readily available. Organization can save time and cost by using a pre-built product and jump start their DMS and content management needs.

eDocNet provides extensive and easy Content management. Business user will be able to update the information and approve the workflow requests as required. Thus it increases business users productivity and web content will always be current as the business users don't have to depend on technical admin to publish the content, they can publish themselves using simpler user interface and navigation.

eDocNet is an Electronic Document Management System which manages the full life-cycle of the documents and records in an organization. It provides the following -

- A fully web-based EDMS
- Easy-to-use & fully interactive UI
- Better & facilitated Version control
- Centralized storage of documents
- Enables collaborative work ecosystem
- Automated workflows
- Role-based security & access to documents
- Supports major file-types
- Fast & Easy Content Search
- Document Edit Alert
- Auto-Feeder
- Content Relationship

**Features of eDocNet:**

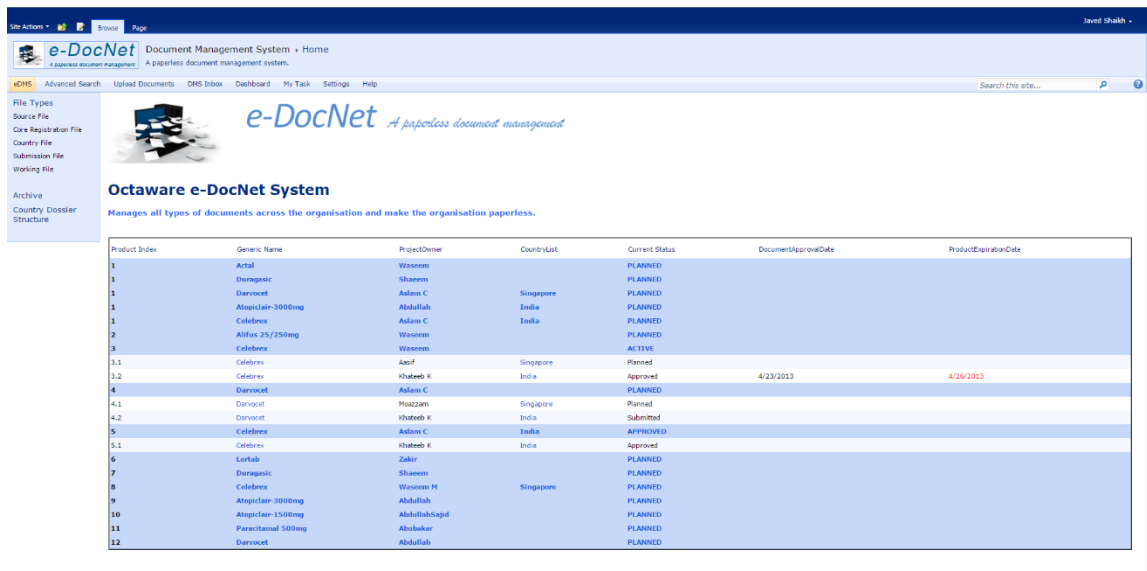
eDocNet is a powerful Document Management System built over Microsoft SharePoint, that has robust document management function, easy and versatile collaborative platform, flexible administration structures and document archiving.

eDocNet includes the following features:

- » Centralized Document Repository
- » Check-In & Check-Out
- » Version Control & Audit
- » Classification & Indexing
- » Search & Retrieval
- » Security
- » Integration with Desktop Client Applications
- » Workflow
- » Collaboration
- » Archiving
- » Imaging
- » Records Management

### 2.1.1 Centralized Document Storage

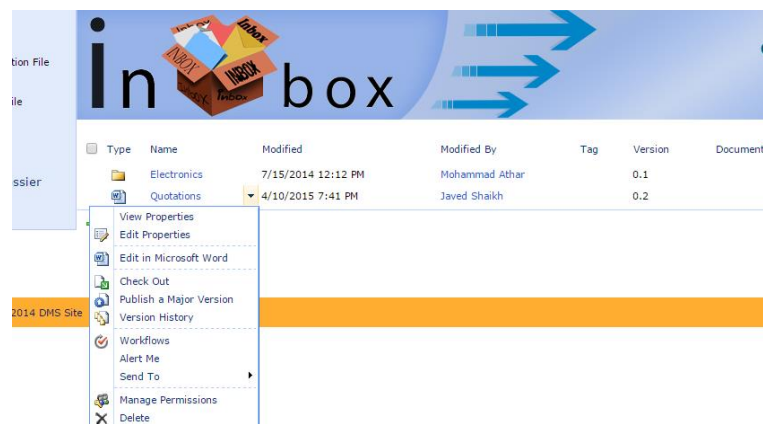
eDocNet features a document repository where all documents of an organization are stored centrally on a server. This facilitates users to retrieve documents instantly from the repository through functionalities such as search and retrieval or browsing.



### 2.1.2 Check-In and Check-Out

Check-in and check-out functionality of eDocNet implies that only one user is allowed to edit a document at a time.

Prior to making any changes, the user checks the document out. While the document is checked out for editing, it ensures that other users can only view a read-only version of the document and are unable to amend the document. After the user has modified the document, he will then check the document in. It is then updated in the document repository and other users are then able to view and/or modify the updated document.



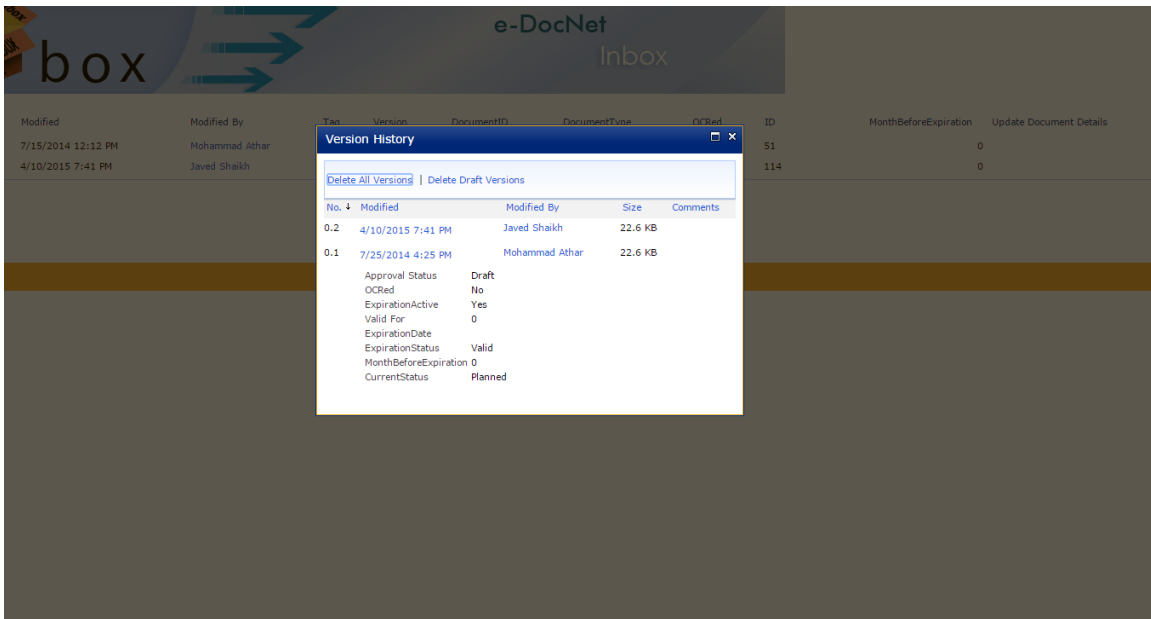


### 2.1.3 Versioning & Audit

Another powerful feature of eDocNet includes versioning & auditing. Each time a document is modified and updated, eDocNet keeps track of these updated documents through versioning.

In versioning these documents are assigned numbers, such as 1.0, 2.0, etc. These are called major revisions. Documents which are assigned numbers such as 1.2, 1.3, etc., are then called minor revisions. As the document is checked-out, modified, and checked-in these numbers are incremented.

Auditing facilitates authorized users to run reports to identify & ascertain what, when and by whom those changes have been made.



## 2.1.4 Metadata for Document Classification & Indexing

eDocNet enables the user to classify and index documents by way of using metadata. This facilitates search and retrieval activity at a later time. Metadata includes information such as author, document date, document title, etc.

The screenshot displays the 'Management System > Inbox' interface. A modal window titled 'Inbox - AF010233953.doc' is open, showing the following metadata:

Name	AF010233953
Title	Tool: Adm Account planning - MOSS
Barcode Value	
DocumentID	
MetaData	
Tag	
Barcode	
DocumentType	
OCRed	No
ExpirationActive	Yes
ApprovalDate	
ExecutedBy	
Valid For	0
ExpirationDate	
ExpirationStatus	Valid
MonthBeforeExpiration	0
DocumentApprover	
ApprovedBy	
CurrentStatus	Planned
Approval Status	Draft

At the bottom of the window, it states: Content Type: Document, Version: 0.1, Created at 11/20/2014 2:17 PM by Abubakar, Last modified at 11/20/2014 2:17 PM by Abubakar. A 'Close' button is visible at the bottom right of the window.

## 2.1.5 Searching & Retrieving Document

The point of classifying and indexing the documents is to make faster search and retrieving for instant access of the document. eDocNet offers several ways of searching for documents including:

- » Basic search functionality - Basic search involves finding the documents using keywords that match up either content or metadata of the searched document.
- » Advanced search functionality - Advanced search functionality works by not only connecting several metadata fields to seek documents but also searches for words or phrases in documents' contents.

### 2.1.6 Granular Permission Access & Security

eDocNet enables secured access to documents with granular permission settings in documents, inboxes, folders, and workflows. With the role-based access and security, eDocNet ensures -

- » Access to documents is granted based on the roles in the organization
- » All information is organized & secured in a central repository
- » Data is protected with secured encryption

### 2.1.7 Automated Workflows

Workflows is a significant feature of an EDMS. It enables an organization to bind the business processes, documents and people together. With workflows in eDocNet, it enables to -

- » Establish automated workflows in align with document-based processes
- » Easily create workflows with user-friendly wizards
- » Track documents in the process
- » Make an audit trail and report on every documents that is included in the workflow.
- » Create tools for advanced reporting and analytics
- » Include business rules to workflows aligned to your business process.

### 2.1.8 Desktop Scanning

eDocNet is enabled to capture documents through desktop scanning. This benefits in getting rid of physical file cabinets and facilitates for streamlined search of the document and its content after it has been processed with OCR.

### 2.1.9 Imaging

Imaging with OCR technology enables a document and its content to be searchable by the users within an organization. eDocNet enabled with the OCR technology helps to -

- » Capture data automatically from scanners and OCR files
- » Scan large volumes of existing files called as Backfile Scanning
- » Capture images of signatures, seals or similar markings

### 2.1.10 Records Management

Records provide evidence of your business. A record depends upon the information that it contains and its context. Records can be in the form of paper or digital, such as, emails, faxes, spreadsheets, documents, etc.

Records Management feature of eDocNet manages records systematically and efficiently. It includes -

- » Creating, capturing and annotating
- » Securing and archiving as long as they are needed
- » Destroying once they are not required

### 2.1.11 Supports Major File Types

eDocNet supports full uploading and downloading support to all popular types of documents. File types include the following -

- » Microsoft Office Word Document (\*.doc)
- » Microsoft Office Excel Spreadsheet (\*.xls)
- » PDF documents (\*.pdf)
- » CAD files (\*.dwg)
- » Primavera Project Planners (P3 file types)

### 2.1.12 Document Edit Alert

eDocNet provides document edit alert. This feature gives alert to the users of the document when the document is modified.

## 2.2 System Requirements:

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### 2.2.1 Hardware Requirements

#### Web Server:

- Windows server 2008 R2 / 2012
- RAM 24 GB (Minimum 16GB)
- HDD - Hard Drive 80 GB

#### Data Base Server:

- Windows Server 2008 R2 / 2012
- RAM 16 GB (Minimum 12GB)
- HDD - Hard Drive 200 GB

### 2.2.2 Software Requirements

- eDocNet Application
- IIS server (Web Server)
- .Net 3.5 Framework
- Microsoft SQL Server 2005 with SQL Reporting Services

## 3 Appendix - A

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### 3.1 Some Octaware Client Feedback

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"Octaware Technologies is a great partner. Their staff is professional with top-notch skill sets. We can think of nobody better than Octaware Technologies to entrust our software services"

**Nasser Saleh, AGM IT & Operations (CIO), Dlala Holding Qatar. Leading investment**

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"AskMe takes great care in identifying and selecting long-term partners. Octaware Technologies as our new partner has provided us with an efficient, flexible, and cost-effective solution  
Exceeding our expectations"

**Anil Kumar, General Manager AskMe**

<http://www.askme.com/> : AskMe provides proven, cost-effective software and services for collaboration and knowledge management

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"Octaware Technologies was quick and accurate in understanding our business needs and provided creative solutions. They are very conscious of their client's time and money, but at the same time willing to spend as much time as needed with their customers. We would recommend Octaware without hesitation."

**Hossein Mousavi, Co-founder, VP of Product Development**

<http://www.mporia.com/> : mPoria enables merchants to market and sell their products via mobile phones.

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## Worksharpergonomics

"Octaware Technologies understood our need and provided creative solutions with in depth analysis. They are very conscious of the quality of the deliverables and are willing to go an extra mile to ensure the quality work gets done. We would recommend Octaware without hesitation." -

**Robin Gill, Director and founder, 1092923 Alberta Ltd:** Alberta Ltd. provides the e-Learning management system in the area of healthcare.

### 3.2 Global Presence & Capabilities

- 2 Software Development centers in the city of Mumbai & Pune, India

- Offices Globally:
  - Seattle, USA
  - Singapore
  - UAE
  - Qatar
  - Saudi Arabia
  - Nigeria
  - Zimbabwe



Our Membership -

- » National Association of software & service Companies (NASSCOM)
- » Electronics and Computer Software Export Promotion Council, India (ESC)
- » Micro, Small & Medium Enterprises Associations (MSME)
- » International Association of Microsoft Channel Partners (IAMCP)
- » Washington's Technology Association
- » Indo-Arab Chamber of Commerce & Industries (IACCI)
- » Data Security Council of India (DSCI)

#### 3.2.1 Octaware Research and Development

Octaware offerings are backed by its investment in Research and Development in cutting edge technology. Octaware management believes and invests heavily in the research and development areas of the new technology. The Emerging Technology Group (ETG) continuously evaluates the new offering in the technology domain and builds expertise within the organization.

### 3.2.2 Octaware Consultants

At Octaware, technology specialists and business management experts share expertise to gain a thorough insight into the client's business, and look for innovative ways to apply technology for lasting solutions. We believe in enhancing the competitive edge of our customers by providing the best of the IT solutions meeting their needs.

### 3.2.3 Octaware Quality - a key business driver

The quality is embedded in Octaware software development life cycle processes. From the inception of the project to the end, at each level the quality of the deliverables are quantified and evaluated. The Quality Assurance team at Octaware works very closely with the Development team to ensure the end deliverables meets the requirement.

### 3.2.4 Octaware Alliances

Octaware increases the diversity of its offerings through strategic alliances and vendor membership with the global leaders in technology and e-Business, such as Microsoft. The Microsoft membership allows the Octaware to be in touch with the latest happening in the IT industry and evaluate the offering for our customer best use before the technology is released.

### 3.2.5 Octaware Products & Business/Technical Verticals

Besides providing end-to-end solutions to its clients, Octaware also develops and markets innovative software products and tools for the worldwide market. The Octaware has the e-Learning platform for the organization to deploy and publish the e-Learning needs. Octaware e-Learning provides an enterprise with the complete end to end e-Learning Management solution. At Octaware the groups are segregated by Industry practices and Service Practices to gain both the domain and technical knowledge. The IP and SP are as follows

**Industry Expertise:** Healthcare, Education, Government, Telecom, Oil & Gas, Banking & Financial, Real Estate & Construction and Manufacturing

**Service Expertise:** Custom Software Development, Enterprise Portal Services, ERP/CRM Implementation, Mobile & RFID Solutions, Cloud & Infrastructure Services, Geospatial Services & Consulting

Octaware offers products and services in e-Business, Application Development, Architecture & Technology Consulting, Engineering Services and Infrastructure Development, across verticals such as Airline, Banking, Financial Services, Oil & Gas, Insurance, Telecom, Manufacturing, Retail, Transportation, Healthcare, Government and Utilities.



Octaware’s proven combination of established methodology, quality processes, experienced project management, skilled business analysts, deep technical integration ability and knowledge results in maximum return on investment and lower risk for our customers. In

### 3.3 Emerging Technology Group (ETG)

Octaware has well defined Emerging Technology Group to track the technology changes in the industry. The ETG serves the project by training the new resources in the project technology with its repositories of best practices and technology knowledge. The senior resources of Octaware are assigned to the ETG. On completion of the project, the best practices are compiled by ETG for reuse. The ETG adds value to the customer project by jump starting with reusable components/best practices/ coding guidelines.

