



Arco

Arco DocRoom

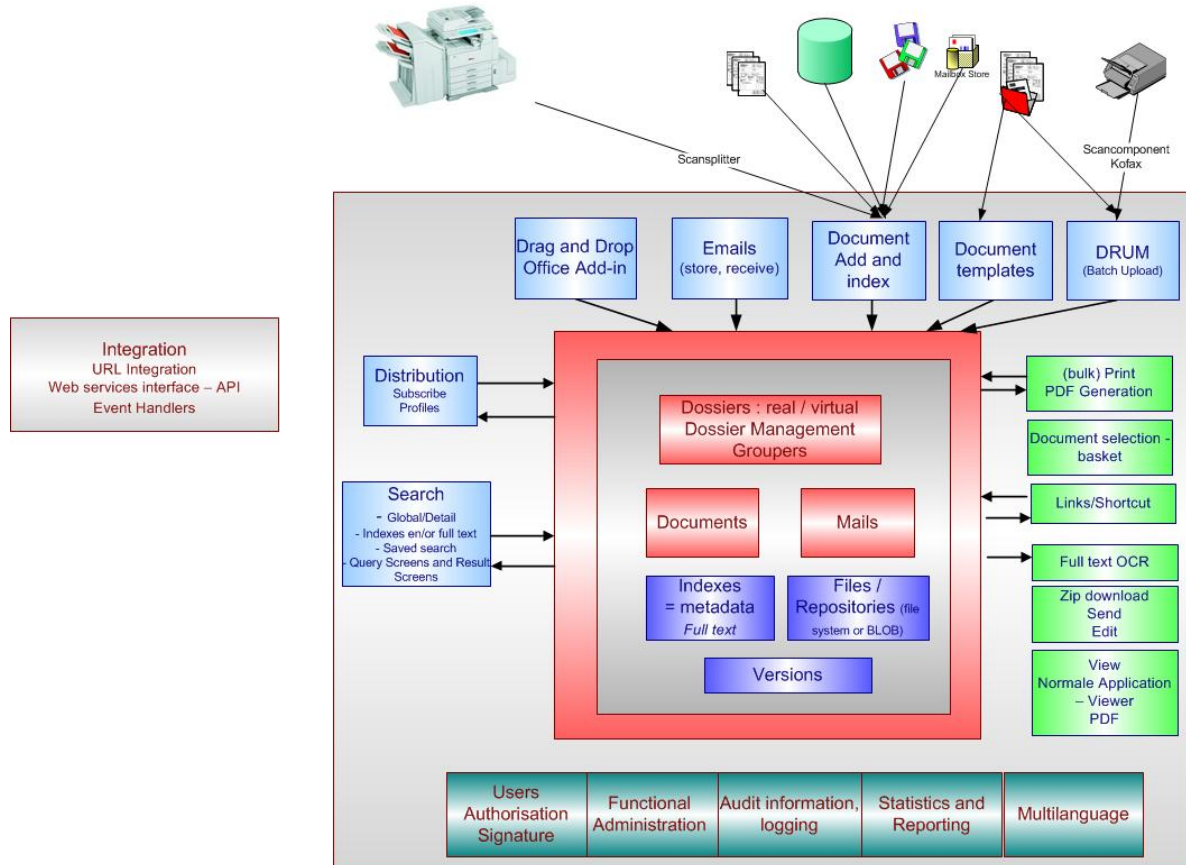
A new era in document management.

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1 Scheme with functions

1.1 Scheme with functions



1.2 Technical architecture

Arco DocRoom is a .NET based 64 bit application environment for document management.

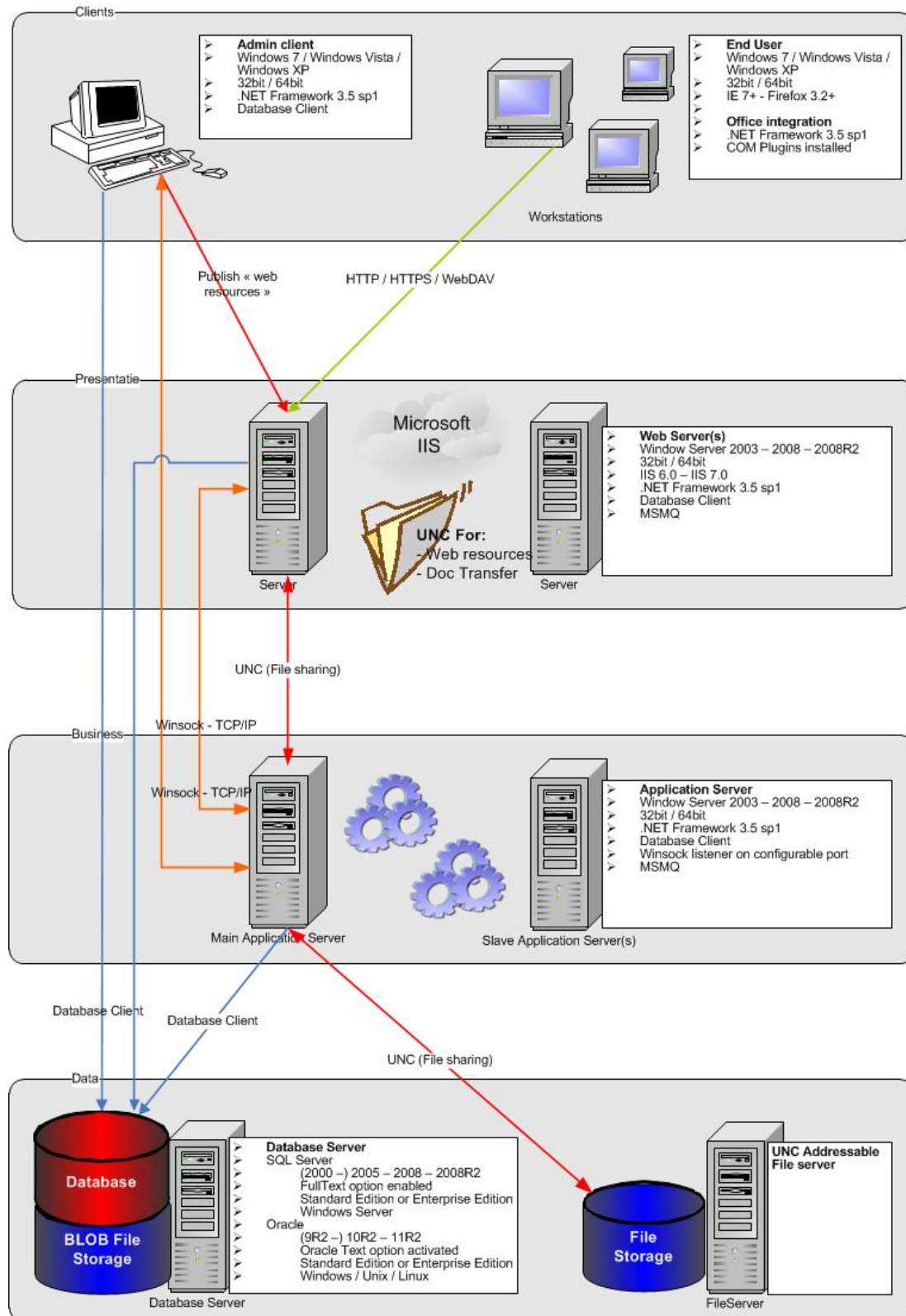
It is based on 3 layers : a business layer with application servers, a presentation layer and a client side layer.

End-user functionality is available through browsers.

It can be extended with Arco Routing, a workflow environment.

It focuses on :

- Delivering end-user integration capabilities and integration with various environments
- Manage high performance, scalable
- Highly configurable, avoiding custom development
- Well secured, with full logging, allowing it to use it in business critical environments



1.3 File server and objects

The files can be stored in the database (BLOB) or on the file server. Multiple file servers can be setup.

1.4 Batch Jobs

Standard jobs and custom jobs can run as batch jobs. The frequency can be configured. The goal is to ensure optimum performance, including for large environments.

							Application Server	BatchJobs	File Servers	File Extensions	Manage Lists	Action Profiles	Man
ID	Name	Last	Next	Status									
14	Analyse Oracle indexes	16-07-2011 20:00:56	23-07-2011 20:00:00	Idle	Details	Execute							
9	Calculate Object Content	19-07-2011 11:13:19	19-07-2011 11:18:19	Idle	Details	Execute							
23	Check Cases for Asynchronous Release	19-07-2011 10:36:17	19-07-2011 11:36:17	Idle	Details	Execute							
22	Check Expired Cases	19-07-2011 10:36:17	19-07-2011 11:36:17	Idle	Details	Execute							
24	Check Suspended Cases	19-07-2011 10:36:17	19-07-2011 11:36:17	Idle	Details	Execute							
21	Check triggers	19-07-2011 11:13:19	19-07-2011 11:14:19	Idle	Details	Execute							
12	Collect Files From OCR	19-07-2011 11:07:19	19-07-2011 11:17:19	Idle	Details	Execute							
2	CollectFilesForEditing	19-07-2011 11:12:49	19-07-2011 11:17:49	Idle	Details	Execute							
6	CollectFilesPreparedForIndexing	19-07-2011 11:07:49	19-07-2011 11:17:49	Idle	Details	Execute							
8	CollectFilesPreparedForReIndexing	19-07-2011 11:07:49	19-07-2011 11:17:49	Idle	Details	Execute							
50	Empty entire recyclebin			Disabled	Details	Execute							
3	Expire Objects	19-07-2011 10:36:17	19-07-2011 11:36:17	Idle	Details	Execute							
2040	ISLP-Drumming	19-07-2011 11:13:49	19-07-2011 11:14:49	Idle	Details	Execute							
15	Logoff idle Users	19-07-2011 11:12:19	19-07-2011 11:17:19	Idle	Details	Execute							
2020	POST	19-07-2011 11:12:49	19-07-2011 11:13:49	Idle	Details	Execute							
2060	POSTUD	08-07-2011 16:49:38		Disabled	Details	Execute							
41	Remove Drum Logging	19-07-2011 10:36:17	19-07-2011 11:36:17	Idle	Details	Execute							
4	Resend Error Messages	19-07-2011 08:18:07	19-07-2011 20:18:07	Idle	Details	Execute							
16	Run Oracle fulltext synchro	19-07-2011 11:13:49	19-07-2011 11:14:49	Idle	Details	Execute							
11	Send Files To OCR	19-07-2011 11:10:49	19-07-2011 11:20:49	Idle	Details	Execute							
25	Send Notifications	19-07-2011 11:11:49	19-07-2011 11:16:49	Idle	Details	Execute							
7	Send subscriptions	19-07-2011 11:12:19	19-07-2011 11:22:19	Idle	Details	Execute							
999	Update Counters	19-07-2011 11:08:49	19-07-2011 11:13:49	Idle	Details	Execute							
1	Validate Indexes	19-07-2011 11:10:19	19-07-2011 11:15:19	Idle	Details	Execute							

[Refresh](#)

2 Configuration elements

2.1 Main actions as an administrator

Administrators have an Admin client for

<ul style="list-style-type: none"> Configuration <ul style="list-style-type: none"> Pool properties Document categories Folder categories Case categories Procedures <ul style="list-style-type: none"> Pool category user events Pool procedure user events Document templates Notification templates Screens Drum Input Connectors Managed lists Edit-checks Categories Edit-checks Procedures Import Export 	
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Pool properties : properties that are used for multiple applications, e.g. customer number

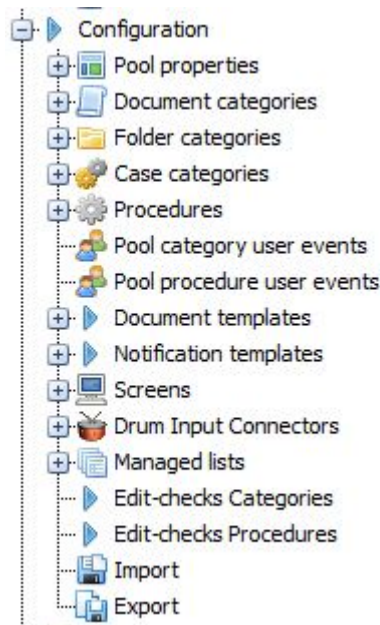
Document categories : type of document

Folder categories : setup of folders in the system

Case Categories : linked to workflow use (container of information linked to a property)

Procedures : workflow processes

Document templates : generate standard documents with fill-in of properties and storage
 Notification templates : send email messages (expiration, new work, subscription)
 Screen : configure screen setup (eg advanced use, simple use)
 Drum : batch upload of documents
 Managed lists : select information from lists. Lists can be external or internal (avoids creation of external databases if not existing)
 Edit checks : check structure of fields and field relationships without development
 Import/Export : e.g. from development system to test system



2.2 File extensions

Out-of-the box the most common file extensions are active, others can be added.

Extension	Category	Fulltext	Keywords	OCR	Edit mode	PDF	Html	Thumbnail	Movie	Preview	Edit Delete	Re-Index
bmp	0	Global	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Edit Delete	Re-Index
doc	0	Global	<input checked="" type="checkbox"/>	<input type="checkbox"/>	WebDav	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Html	Edit Delete	Re-Index
docx	0	Global	<input checked="" type="checkbox"/>	<input type="checkbox"/>	WebDav	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Html	Edit Delete	Re-Index
gif	0	Global	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Edit Delete	Re-Index
htm	0	Global	<input checked="" type="checkbox"/>	<input type="checkbox"/>	In-Line	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Edit Delete	Re-Index
jpg	0	Global	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Edit Delete	Re-Index
pdf	0	Global	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Edit Delete	Re-Index
png	0	Global	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Edit Delete	Re-Index
ppt	0	Global	<input checked="" type="checkbox"/>	<input type="checkbox"/>	WebDav	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Edit Delete	Re-Index
pptx	0	Global	<input checked="" type="checkbox"/>	<input type="checkbox"/>	WebDav	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Edit Delete	Re-Index
rtf	0	Global	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Edit Delete	Re-Index
tif	0	Global	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Edit Delete	Re-Index
tst	0	Global	<input checked="" type="checkbox"/>	<input type="checkbox"/>	In-Line	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Html	Edit Delete	Re-Index
xls	0	Global	<input checked="" type="checkbox"/>	<input type="checkbox"/>	WebDav	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Edit Delete	Re-Index
xlsx	0	Global	<input checked="" type="checkbox"/>	<input type="checkbox"/>	WebDav	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Edit Delete	Re-Index
xml	0	Global	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Edit Delete	Re-Index

For certain file types additional elements can be configured, e.g. :

- How do we view the file (read-only) and while editing ?
- Full text OCR (image files), Full text indexing
- Batch thumbnail generation (for image-type files)

2.3 Manage security

Security profiles (action profiles) can be configured. The can be used related to folders, documents, workflow cases, screens, etc.

Application Server	BatchJobs	File Servers	File Extensions	Manage Lists	Action Profiles
<ul style="list-style-type: none"> <input checked="" type="checkbox"/> edit files <input checked="" type="checkbox"/> Execute useerevents <input checked="" type="checkbox"/> Full Control <input checked="" type="checkbox"/> Read&Change <input checked="" type="checkbox"/> Reader <input checked="" type="checkbox"/> Set ACL <input checked="" type="checkbox"/> System Administrator <input checked="" type="checkbox"/> test <input checked="" type="checkbox"/> view files 					

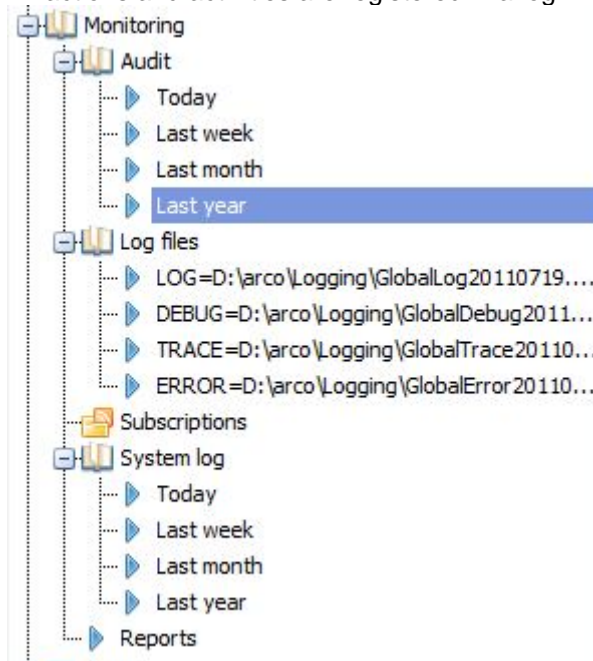
In these action profiles very detailed security definitions can be added. It includes the standard actions, but also the custom actions (actions setup by the customer with a specific purpose).

<input checked="" type="checkbox"/>	Add Comments
<input checked="" type="checkbox"/>	Add file when the document is checked out
<input checked="" type="checkbox"/>	Add file when the document is in creation
<input checked="" type="checkbox"/>	Add file when the document is not checked out
<input checked="" type="checkbox"/>	Admin Case Data
<input checked="" type="checkbox"/>	Admin Case Status Fields
<input checked="" type="checkbox"/>	Admin Comments
<input checked="" type="checkbox"/>	Check-in Other users Documents
<input checked="" type="checkbox"/>	Configure Application
<input checked="" type="checkbox"/>	Create Document
<input checked="" type="checkbox"/>	Create Mail
<input checked="" type="checkbox"/>	Create new document version
<input checked="" type="checkbox"/>	Create new file version when the document is not checked out
<input checked="" type="checkbox"/>	Create Object Link
<input checked="" type="checkbox"/>	Create Public Property expansion
<input checked="" type="checkbox"/>	Create Shortcut
<input checked="" type="checkbox"/>	Create Subfolder
<input checked="" type="checkbox"/>	Delete Comments
<input checked="" type="checkbox"/>	Delete Document
<input checked="" type="checkbox"/>	Delete file when the document is checked out
<input checked="" type="checkbox"/>	Delete file when the document is not checked out
<input checked="" type="checkbox"/>	Delete Folder
<input checked="" type="checkbox"/>	Delete Mail
<input checked="" type="checkbox"/>	Delete Shortcut
<input checked="" type="checkbox"/>	Execute Custom Action : All
<input checked="" type="checkbox"/>	Execute User event : All
<input checked="" type="checkbox"/>	Execute User event : Add to checks
<input checked="" type="checkbox"/>	Execute User event : Advies
<input checked="" type="checkbox"/>	Execute User event : Delete
<input checked="" type="checkbox"/>	Execute User event : Doorsturen
<input checked="" type="checkbox"/>	Execute User event : Doorsturen
<input checked="" type="checkbox"/>	Execute User event : gd_BehandelaarLookup
<input checked="" type="checkbox"/>	Execute User event : gd_BehandelaarLookupBBB
<input checked="" type="checkbox"/>	Execute User event : GenerateTemplate
<input checked="" type="checkbox"/>	Execute User event : gentemplate
<input checked="" type="checkbox"/>	Execute User event : Kennisgeving
<input checked="" type="checkbox"/>	Execute User event : Kies uitvoerder
<input checked="" type="checkbox"/>	Execute User event : Idud_ExterneGoedkeuringLookupBBB
<input checked="" type="checkbox"/>	Execute User event : Idud_VerstuurdDocumentUserLookupBBB
<input checked="" type="checkbox"/>	Execute User event : Save Sender
<input checked="" type="checkbox"/>	Execute User event : SaveSender
<input checked="" type="checkbox"/>	Execute User event : SaveSender
<input checked="" type="checkbox"/>	Execute User event : Taak
<input checked="" type="checkbox"/>	Execute User event : UitgaandDocument
<input checked="" type="checkbox"/>	Execute User event : Verander uitvoerder
<input checked="" type="checkbox"/>	Full Control

- ✗ Manage public saved queries
- ✗ Modify ACL Case
- ✗ Modify ACL Document
- ✗ Modify ACL Folder
- ✗ Modify Checked Out Files
- ✗ Modify Comments
- ✓ Modify Files
- ✗ Modify Meta Data Checked Out Document
- ✓ Modify Meta Data Document
- ✓ Modify Meta Data Folder
- ✗ Remove Object Link
- ✓ Start Workflow
- ✗ Unlock Other users Documents
- ✗ View ACL Case
- ✗ View ACL Document
- ✗ View ACL Folder
- ✓ View Comments
- ✗ View Document History
- ✓ View File History
- ✓ View Files
- ✓ View Meta Data Document
- ✓ View Meta Data Folder
- ✗ View previous document versions
- ✗ View previous file versions

2.4 Logging

All actions and activities are registered in a log.



This log can be viewed, queried, filtered, exported, etc.

Startup Page Reports Audit			
<div> <div>Filter Refresh Print</div> <div>Grid</div> <div>Close</div> </div>			
<input type="radio"/> Today <input type="radio"/> Last week			
Drag a column header here to group by that column			
DATE	USER	ACTION	DESCRIPTION
2010-1-...	_DATABASE\ADMIN	LOGIN	LOGIN
2010-1-...	_DATABASE\ADMIN	ACLOVERRIDE	ACLOVERRIDE : ACL Overriden from the root
2010-1-...	_DATABASE\ADMIN	CREATE	CREATE
2010-1-...	_DATABASE\ADMIN	ACLOVERRIDE	ACLOVERRIDE : ACL Overriden from the root
2010-1-...	_DATABASE\ADMIN	ACLSET	ACLSET : Set Full Control for Everyone
2010-1-...	_DATABASE\ADMIN	ACLCOPY	ACLCOPY : ACL copied from the root
2010-1-...	_DATABASE\ADMIN	ACLADD	ACLADD : Added ADMIN to the ACL list
2010-1-...	_DATABASE\ADMIN	ACLADD	ACLADD : Added Everyone to the ACL list
2010-1-...	_DATABASE\ADMIN	CREATE	CREATE
2010-1-...	_DATABASE\ADMIN	ACLSET	ACLSET : Set Full Control for ADMIN
2010-1-...	_DATABASE\ADMIN	CREATE	CREATE
2010-1-...	_DATABASE\ADMIN	CREATE	CREATE
2010-1-...	_DATABASE\ADMIN	PROPCCHANGE	Het veld gd_BetrokeneBTWnummer is veranderd van to
2010-1-...	_DATABASE\ADMIN	CASE	CASE : Converted to Case
2010-1-...	_DATABASE\ADMIN	CREATE	CREATE
2010-1-...	_DATABASE\ADMIN	PROPCCHANGE	Het veld gd_SpecTekst2 is veranderd van to
2010-1-...	_DATABASE\ADMIN	PROPCCHANGE	Het veld gd_SpecTekst1 is veranderd van to
2010-1-...	_DATABASE\ADMIN	PROPCCHANGE	Het veld gd_SpecOpzoeking2 is veranderd van to
2010-1-...	_DATABASE\ADMIN	PROPCCHANGE	Het veld gd_SpecOpzoeking1 is veranderd van to
2010-1-...	_DATABASE\ADMIN	PROPCCHANGE	Het veld gd_SpecDatum2 is veranderd van to
2010-1-...	_DATABASE\ADMIN	PROPCCHANGE	Het veld gd_SpecDatum1 is veranderd van to
2010-1-...	_DATABASE\ADMIN	PROPCCHANGE	Het veld gd_DocumentID is veranderd van -999999 naar 201000001
2010-1-...	_DATABASE\ADMIN	PROPCCHANGE	Het veld gd_DatumRegistratie is veranderd van naar 2010-11-24

2.5 Setting up document categories and screens

Document categories (= document types) can be configured.

For a document category fields can be defined, folder restrictions can be added, properties can be selected (pool properties or specific ones). Also screens for queries and result list with proper security, specific action buttons (user based) or to be executed automatically, edit checks as well as many other properties.

Property configuration for a document category :

Selected screen items						
NAME	MODE	DEFINITION	DEFAULT VALUE	IDENTIFIER	HALF LINE	
> TAB	ItemReadOnly	FreeText	Standaard			
Global search	ItemWritable	FreeText		Global search		
ISLP_PVNr	ItemWritable	FreeText		ISLP_PVNr		
ISLP_Type	ItemWritable	SingleSelect		ISLP_Type		
ISLP_Jaar	ItemWritable	SingleSelect		ISLP_Jaar		
ISLP_Scandate	ItemWritable	FreeText		ISLP_Scandate		
Include subfolders checkbox	ItemWritable	FreeText		Include subfolders checkbox		
TAB	ItemReadOnly	FreeText	Extra			
Status	ItemWritable	FreeText		Status		
ISLP_Barcode	ItemWritable	FreeText		ISLP_Barcode		
ISLP_Author	ItemWritable	FreeText		ISLP_Author		
ISLP_Dossier	ItemWritable	FreeText		ISLP_Dossier		
ISLP_Scantime	ItemWritable	FreeText		ISLP_Scantime		

End-user interface as a result of this definition : a search screen

End-user interface as a result of this definition : a result screen

Title	Abstract	Order date	Total amount	Category	Date
				Order Customer	
VF Europe - 24/03/2010 - VF Europe - 24/03/2010	Scanner Canon DR-4010C, VRS Pro for workgroup scanning + OH, 1 dag prestaties	2010-03-24	6008,2	Order Customer	2010-03-30
VF Europe - 24/03/2011 - VF Europe - 24/03/2011	Scanner Canon DR-6050C + installatie	2011-03-24	5771,98	Order Customer	2011-03-28

Arco DocRoom Customers Vf Europe

Arco DocRoom Customers Vf Europe

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2.6 Batch upload via Drumming

The Drumming (DocRoom upload module) is a tool allowing configuration of batch upload of documents. Formats include XML, txt, database format and Exchange server.

Configuration is graphical. It includes full logging, definition of in- and out- directories, testing and filtering of data, and methods for insertion related to document categories, folders and workflow cases.

XML Connector Folder: D:\Arco\Data\Scansplitter\ISLP\Export

File extensions: XML

Template file: D:\Arco\Data\Drum\XML_TEMPLATES\4_3_2_1_ISLP-TestDOC_0_0_0_3.xml

Transform file:

Name	Node	Attribute	Filter - Att	Filter - Value
SCANDATE	EXPORT/SCANDATE			
SCANTIME	EXPORT/SCANTIME			
PAGECOUNT	EXPORT/PAGECOUNT			
DOCPATH	EXPORT/PATH			
DMPATH	EXPORT/ISLP/DMPATH			
BARCODE	EXPORT/ISLP/BARCODE			
JAAR	EXPORT/ISLP/JAAR			
PVNR	EXPORT/ISLP/PVNR			
PVTYPE	EXPORT/ISLP/PVTYPE			

Feedback Success

☐ Nothing

☐ Move xml to folder

☒ Delete file

Feedback Failed

☒ Nothing

☐ Move xml to folder

2.7 Life cycle management

An “Object _deathdate” can be linked to a document category. When the batchjob “Check expired objects” runs, the objects will be set to not active. The documents will not appear any more in the active database.

2.8 Version management

Full version management is managed on the level of :

- The document as a whole
- The individual file attachments (useful if many file attachments for one document).

3 Integration

3.1 Via URL

Selected documents, folders, result lists and menus / screens can be called via an external application. This allows rapid integration, no need to build a different user interface or to use scripts or API's.

Examples :

- URL shows the file only (no other details) in a web browser window :
<http://www.docroom.net/docroom/apps/docroom.asp?RE=011&folderid=8215>
- URL shows the document in a web browser window : indexes and the file including action buttons (eg change the document) :
<http://www.docroom.net/docroom/apps/docroom.asp?RE=012&docid=126142>
-
- URL shows all documents in the folder (including security check) :
<http://www.docroom.net/docroom/apps/docroom.asp?RE=011&folderid=8215>
- URL executes a query and displays a result list :
<http://www.docroom.net/docroom/apps/docroom.asp?RE=016&folderid=0&queryid=12g1946&screenid=121945>

The system checks the user privileges of that user. So only authorised documents will be shown.

3.2 Via Webservice and API

A full Webservice layer is available. Also an API (on .NET level).

The webservices allow the developers to exchange messages, even if the application development environment of the customer is different (e.g. Java).