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Business Document Model

An ECM can only be as good as it's
model



Something about me

- Heiko Robert
- managing partner @  ecm4u
- ~15 years ECM, 8 years Alfresco





Agenda



Motivation

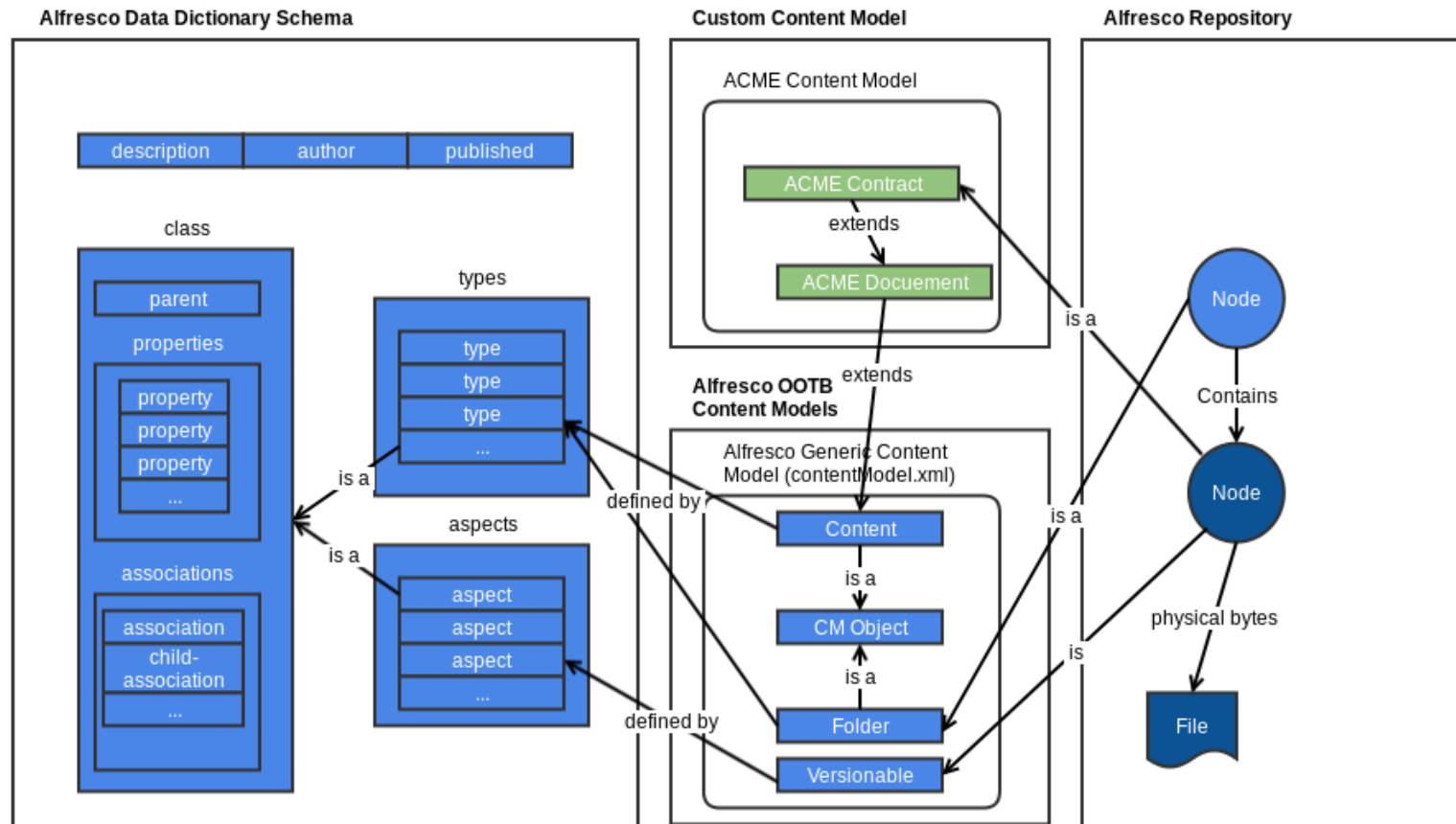
Concepts

How to
use



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Oops! ... I Did It Again





Hands Up!

- Who already implemented a custom model?
- Who tried to optimize a custom model?
- Would you do it again if you could avoid it?



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Business Documents

- Why starting always from scratch?





Why?

should we share a basic, common model

- Easier combination of modules / apps / services
- Learn from each other
- Easier upgrade path, costs savings
- Share customization is expensive
- Very hard to fix errors in model



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Requirements

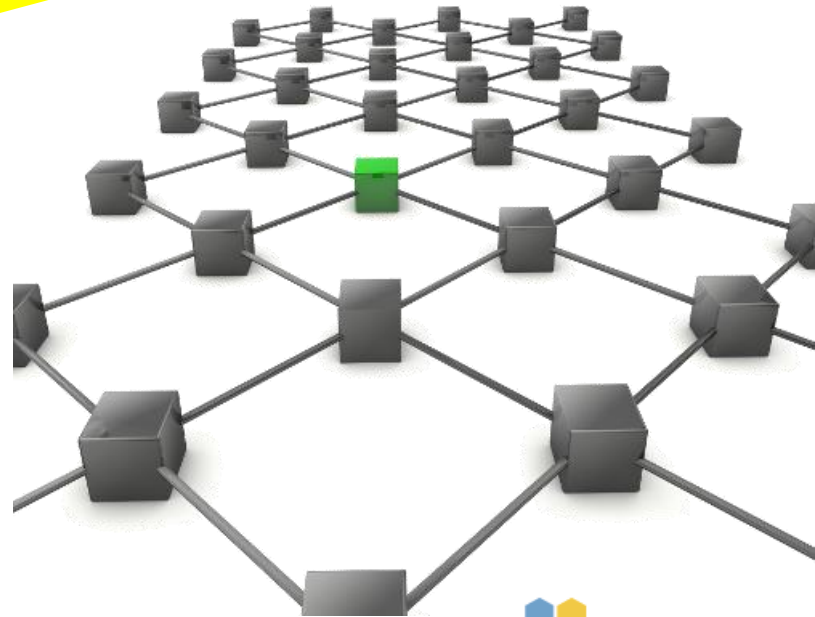
- Filing and finding documents
 - accounting documents
 - correspondence
 - cases and processes
 - ...



Requirements

- Associate documents to business entities
 - Organisations
 - Contacts
 - Contracts
 - Products
 - Projects
 - Cases
 - ...

Not managed in Alfresco





Considerations

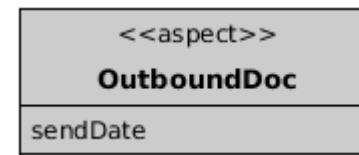
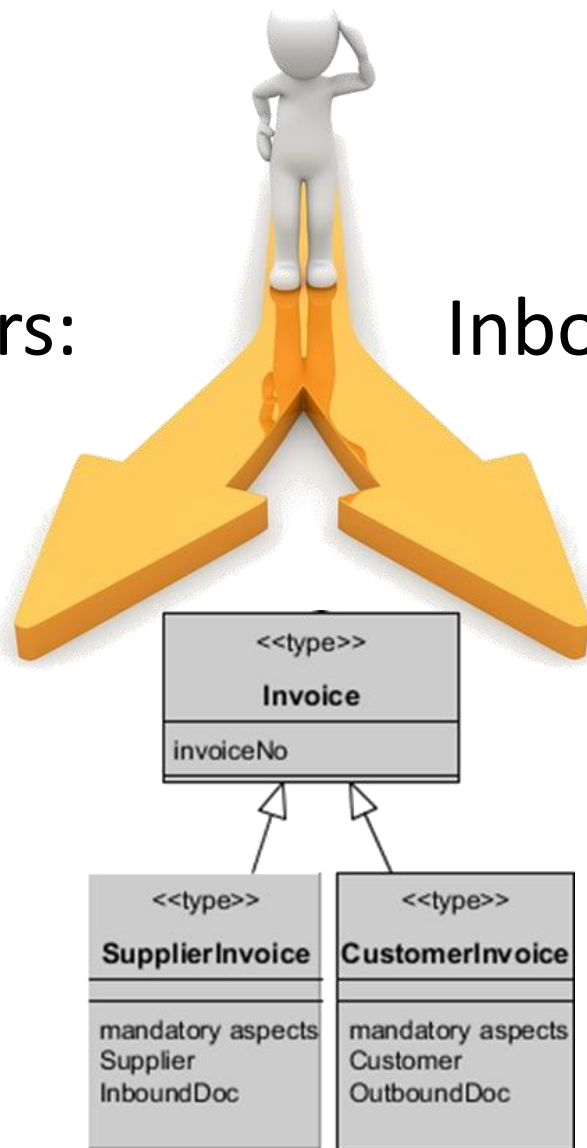
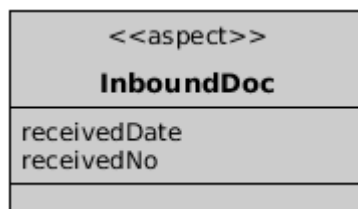
- Alfresco is not a relational database
 - No: relations, multi entity joins
 - Instead: associations, properties
 - Search capabilities may not meet expectations
- Alfresco Types are static
 - can be used as a vehicle for mandatory aspects
- Attach Aspects for Perspectives
 - Business Partner, Contact, Tenant, Project, Product



Direction

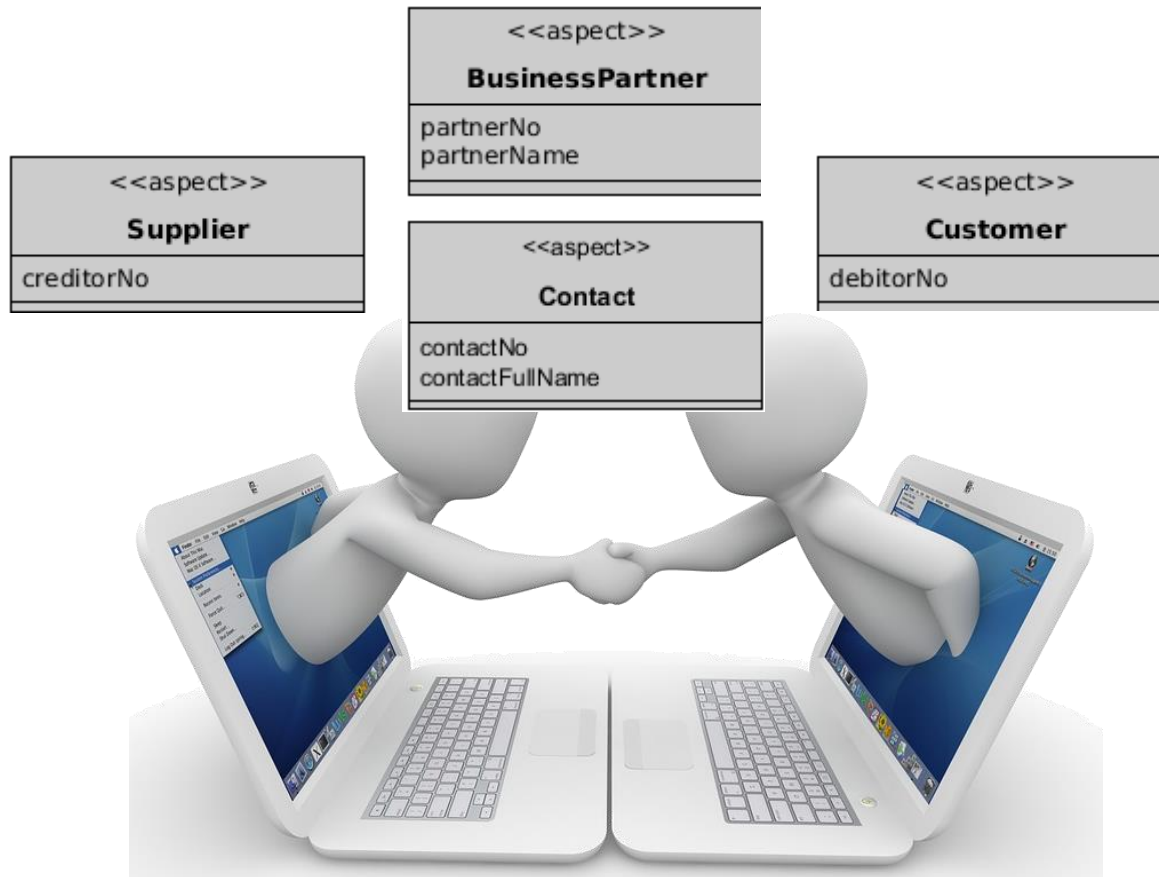
Direction Matters:

Inbound, Outbound



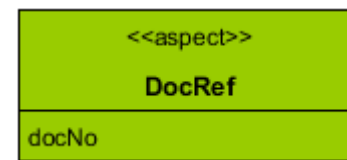
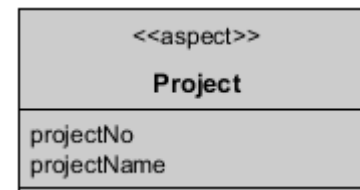
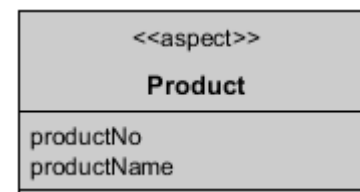
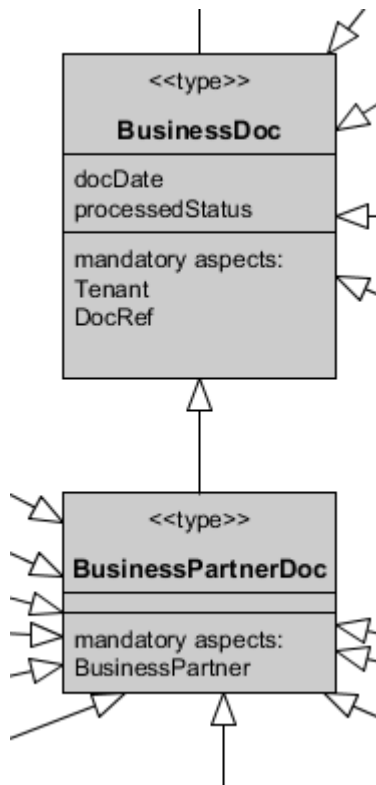
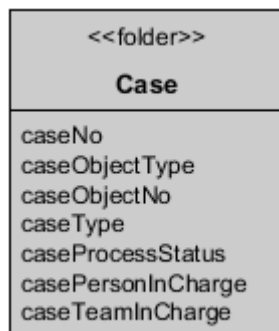
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Roles

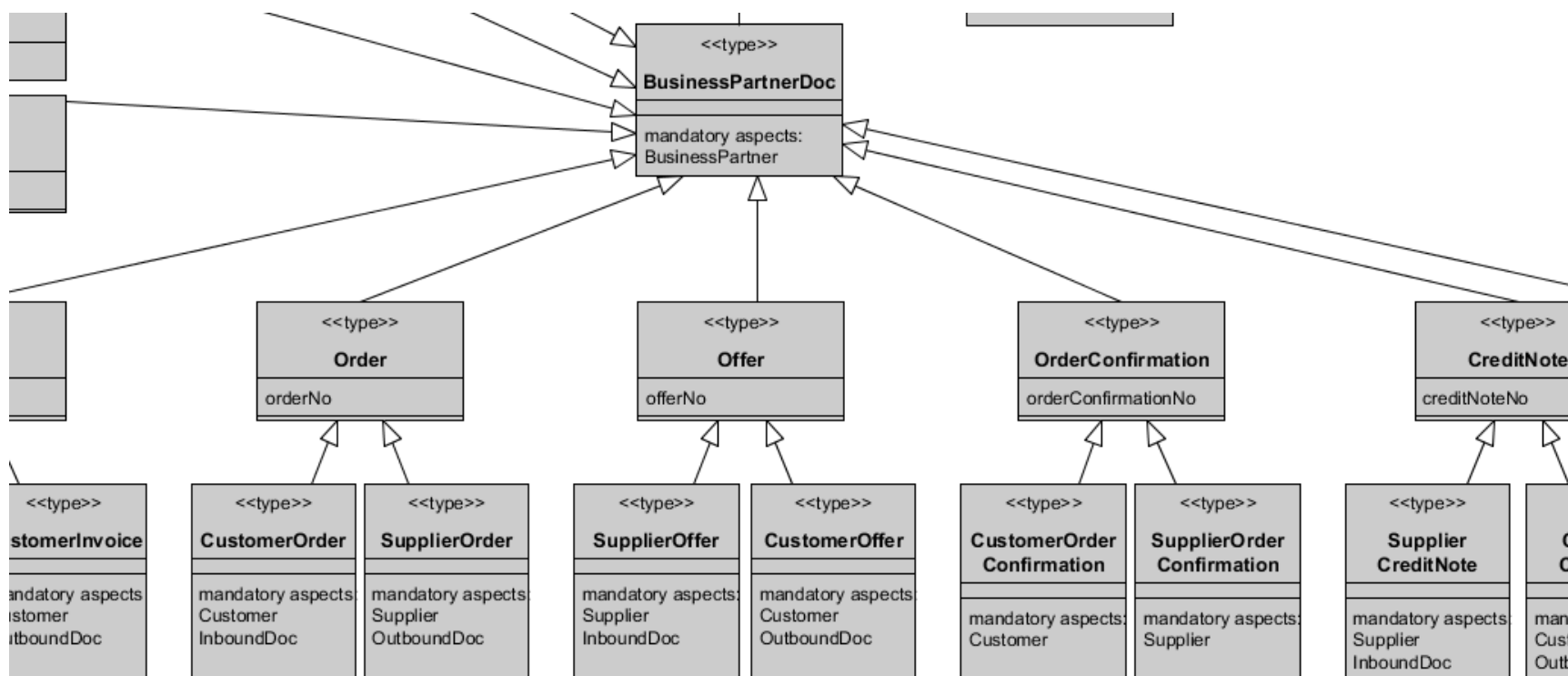


Business Partner Doc

- The Base Types



Business Partner Doc





Do's & Don'ts

- Avoid to copy master data
 - Copy as few data from your leading system as possible into Alfresco properties
 - Use foreign key references like customer no
 - Copied data may get inconsistent
- Avoid using docs without direction
 - Types without direction should only be used for migration (invoice, delivery note, order, offer, ...)





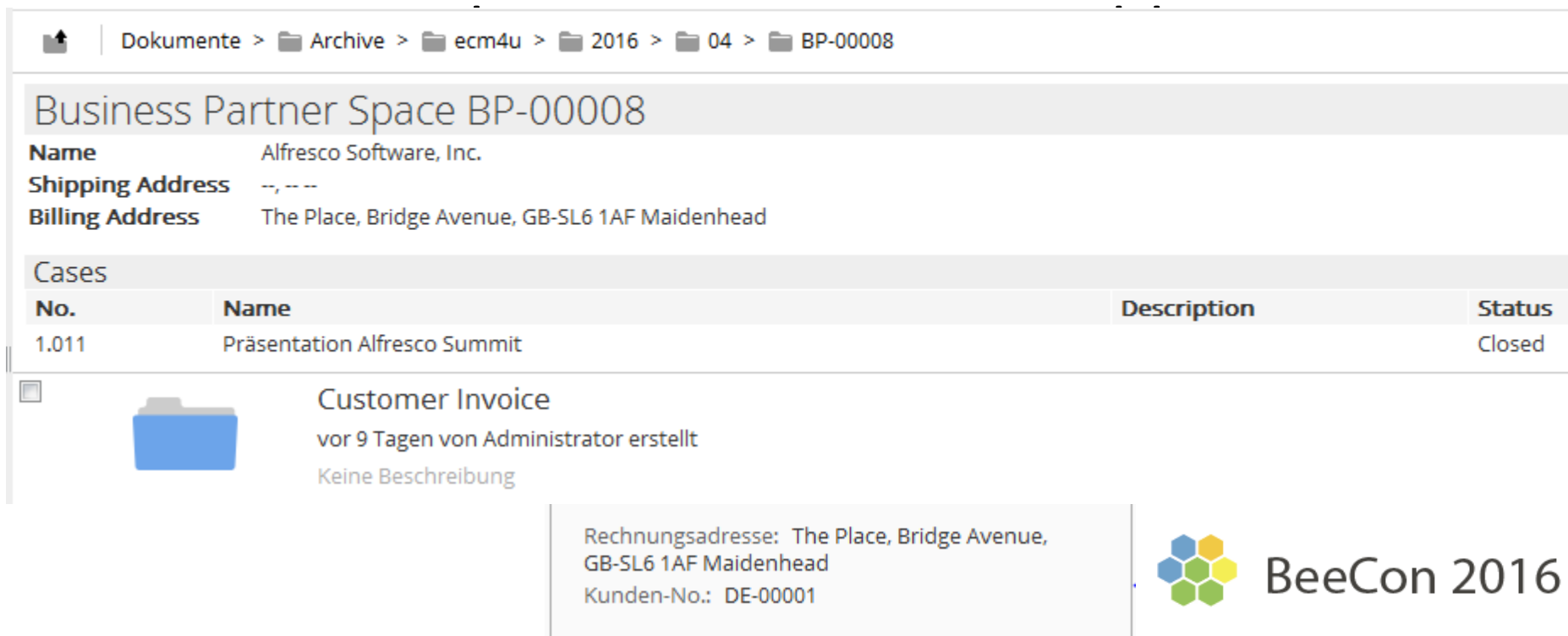
What's *not* in the box?

- Share Forms
 - No support for flexible inheritance / reuse



Tips

- Use folder rules
 - Adding required aspects (e.g. project folder)



The screenshot displays the Alfresco Business Partner Space interface. At the top, a breadcrumb trail shows the navigation path: Dokumente > Archive > ecm4u > 2016 > 04 > BP-00008. Below this, the title 'Business Partner Space BP-00008' is shown. The main content area lists details for the business partner: Name (Alfresco Software, Inc.), Shipping Address (---), and Billing Address (The Place, Bridge Avenue, GB-SL6 1AF Maidenhead). A table titled 'Cases' lists a single case with the number 1.011, titled 'Präsentation Alfresco Summit', with a status of 'Closed'. Below the table, a folder icon is shown next to the text 'Customer Invoice', 'vor 9 Tagen von Administrator erstellt', and 'Keine Beschreibung'. A callout box at the bottom right contains the billing address and customer number: 'Rechnungsadresse: The Place, Bridge Avenue, GB-SL6 1AF Maidenhead' and 'Kunden-No.: DE-00001'. The BeeCon 2016 logo is visible in the bottom right corner.


Dokumente > Archive > ecm4u > 2016 > 04 > BP-00008

Business Partner Space BP-00008


Name Alfresco Software, Inc.
Shipping Address ---
Billing Address The Place, Bridge Avenue, GB-SL6 1AF Maidenhead

Cases

| No. | Name | Description | Status |
|-------|------------------------------|-------------|--------|
| 1.011 | Präsentation Alfresco Summit | | Closed |

 **Customer Invoice**
vor 9 Tagen von Administrator erstellt
Keine Beschreibung

Rechnungsadresse: The Place, Bridge Avenue,
GB-SL6 1AF Maidenhead
Kunden-No.: DE-00001

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Next Steps

- You should
 - check out the model and start to use it
 - give Feedback!
 - collaborate
- We
 - would be happy about any cooperation
 - may switch from „mandatory aspects“ to a policy based logic to be more flexible / to remove specialized types



| |
|---------------|
| <<aspect>> |
| Tenant |
| tenantID |
| |

| |
|------------------------|
| <<aspect>> |
| BusinessPartner |
| partnerNo |
| partnerName |
| |

| |
|-----------------|
| <<aspect>> |
| Contact |
| contactNo |
| contactFullName |
| |

| |
|-------------------|
| <<aspect>> |
| InboundDoc |
| receivedDate |
| receivedNo |
| |

| |
|-----------------|
| <<aspect>> |
| Supplier |
| creditorNo |
| |

| |
|-----------------|
| <<aspect>> |
| Customer |
| debitorNo |
| |

| |
|---------------|
| <<aspect>> |
| Region |
| regionCode |
| |

| |
|--------------------|
| <<aspect>> |
| OutboundDoc |
| sendDate |
| |

| |
|----------------|
| <<aspect>> |
| Product |
| productNo |
| productName |
| |

| |
|----------------|
| <<aspect>> |
| Project |
| projectNo |
| projectName |
| |

| |
|-----------------|
| <<aspect>> |
| Language |
| languageCode |
| |

| |
|------------------------|
| <<aspect>> |
| ContractDetails |
| contractNo |
| |

| |
|-----------------|
| <<aspect>> |
| Revision |
| revisionNo |
| |

| |
|------------------------------|
| <<type>> |
| AcceptanceCertificate |
| |

| |
|--------------------------|
| <<type>> |
| NoticeToTerminate |
| |
| ContractDetails |
| |

| |
|-----------------|
| <<type>> |
| Contract |
| contractType |
| ContractDetails |
| |

| |
|-------------|
| <<type>> |
| Mail |
| mailType |
| |

| |
|----------------|
| <<type>> |
| Invoice |
| invoiceNo |
| |

| |
|--------------|
| <<type>> |
| Order |
| orderNo |
| |

| |
|--------------|
| <<type>> |
| Offer |
| offerNo |
| |

| |
|--------------------------|
| <<type>> |
| OrderConfirmation |
| orderConfirmationNo |
| |

| |
|-------------------|
| <<type>> |
| CreditNote |
| creditNoteNo |
| |

| |
|---------------------|
| <<type>> |
| DeliveryNote |
| deliveryNoteNo |
| |

| |
|------------------------|
| <<type>> |
| SupplierInvoice |
| |
| mandatory aspects: |
| Supplier |
| InboundDoc |
| |

| |
|------------------------|
| <<type>> |
| CustomerInvoice |
| |
| mandatory aspects: |
| Customer |
| OutboundDoc |
| |

| |
|----------------------|
| <<type>> |
| CustomerOrder |
| |
| mandatory aspects: |
| Customer |
| InboundDoc |
| |

| |
|----------------------|
| <<type>> |
| SupplierOrder |
| |
| mandatory aspects: |
| Supplier |
| OutboundDoc |
| |

| |
|----------------------|
| <<type>> |
| SupplierOffer |
| |
| mandatory aspects: |
| Supplier |
| InboundDoc |
| |

| |
|----------------------|
| <<type>> |
| CustomerOffer |
| |
| mandatory aspects: |
| Customer |
| OutboundDoc |
| |

| |
|-----------------------------------|
| <<type>> |
| CustomerOrder Confirmation |
| |
| mandatory aspects: |
| Customer |
| |

| |
|-----------------------------------|
| <<type>> |
| SupplierOrder Confirmation |
| |
| mandatory aspects: |
| Supplier |
| |

| |
|----------------------------|
| <<type>> |
| Supplier CreditNote |
| |
| mandatory aspects: |
| Supplier |
| InboundDoc |
| |

| |
|----------------------------|
| <<type>> |
| Customer CreditNote |
| |
| mandatory aspects: |
| Customer |
| OutboundDoc |
| |

| |
|------------------------------|
| <<type>> |
| Supplier DeliveryNote |
| |
| mandatory aspects: |
| Supplier |
| InboundDoc |
| |

| |
|------------------------------|
| <<type>> |
| Customer DeliveryNote |
| |
| mandatory aspects: |
| Customer |
| OutboundDoc |
| |

| |
|--------------------|
| <<folder>> |
| Case |
| caseNo |
| caseObjectType |
| caseObjectNo |
| caseType |
| caseProcessStatus |
| casePersonInCharge |
| case TeamIn Charge |
| |

| |
|---------------------------|
| <<type>> |
| ProcurementRequest |
| |

| |
|----------------------|
| <<type>> |
| Documentation |
| |
| Revision |
| |

| |
|----------------|
| <<type>> |
| Minutes |
| |

| |
|--------------------|
| <<type>> |
| Calculation |
| |

| |
|--------------------|
| <<type>> |
| BusinessDoc |
| docDate |
| processedStatus |
| |
| mandatory aspects: |
| Tenant |
| DocRef |
| |

| |
|---------------------------|
| <<type>> |
| BusinessPartnerDoc |
| |
| mandatory aspects: |
| BusinessPartner |
| |

| |
|-----------------------------|
| <<folder>> |
| BusinessPartnerSpace |
| |
| mandatory aspects: |
| BusinessPartner |
| |

| |
|---------------------|
| <<folder>> |
| ProjectSpace |
| |
| Project |
| Customer |
| |

| |
|---------------------|
| <<folder>> |
| ProductSpace |
| |
| Product |
| |

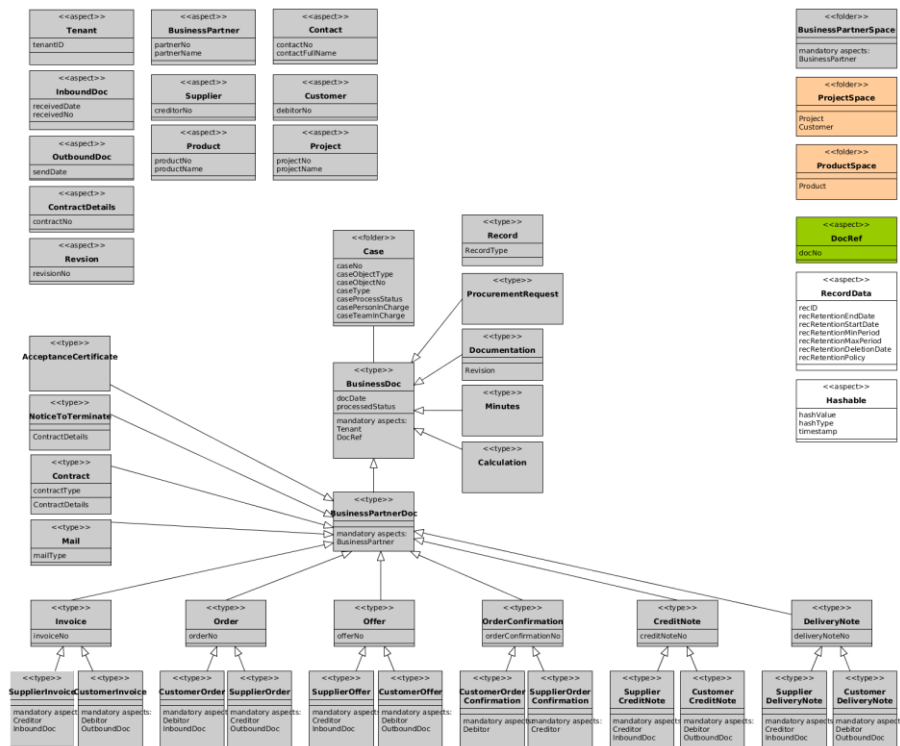
| |
|---------------|
| <<aspect>> |
| DocRef |
| docNo |
| |

| |
|--------------------------|
| <<aspect>> |
| RecordData |
| recType |
| recRetentionEndDate |
| recRetentionStartDate |
| recRetentionMinPeriod |
| recRetentionMaxPeriod |
| recRetentionDeletionDate |
| recRetentionPolicy |
| |

| |
|-----------------|
| <<aspect>> |
| Hashable |
| hashValue |
| hashType |
| timestamp |
| |

Q & A

Thank you!



<https://github.com/ecm4u/businessdocumentmodel>



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