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National Institute for Health Specialties (NIHS)

NIHS System-BRD

Sprint 2

Submission Date: 1/30/2025

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Document History

Name	Version	Date	Change Reference
NIHS Portal Sprint 2_V1.0.docx	1.0		Initial draft version
NIHS Portal Sprint 2_V1.1.docx	1.1	31/01/2025	Update as per review comments from NIHS team

Abbreviations

Abbreviation	Meaning
NIHS	National Institute for Health Specialties
SC	Scientific Committee
SMEs	Subject Matter Experts
Faculty	Faculty staff members
CPD	Continuing professional development
PLV	Professional License Validation
MOC	Maintenance of Certificate
F2F	Face to Face
CME	Continuing Medical Education (CME)



User Roles in NIHS Portal

Below user groups will be defined in the system based on the following information and privileges (To be revised and accumulated in the accumulative BRD)

Services	Responsibility	Role	Owners
CPD	<ul style="list-style-type: none">Log his CPD activityTrack his CPD activities and points	Faculty Member, Resident/Fellow, Internship Student, Medical Professional Emirati Board Certified Members	End user
CPD	<ul style="list-style-type: none">Log activityReview & approve activityTrack CPD pointsThe CPD Unit manages the day-to-day operations, logistics, and administration of all CPD activities.	CPD Unit	CPD Team Fouzia Shersad fshersad@uaeu.ac.ae Ms. Ayah ayah.eshbair@mohesr.gov.ae
CPD	<ul style="list-style-type: none">Overseeing the CPD system.Advising on policies, plans, and decisions related to CPD accreditation.Monitoring compliance with CPD standards.	CPD Committee	



1. CPD Module

CPD is a range of learning activities through which healthcare professionals maintain and develop their knowledge and skills throughout their career to ensure that they retain their capacity to practice safely, effectively and legally within their evolving scope of practice. CPD is also referred to as Continuing Medical Education (CME).

1.1 “MY CPD” Portfolio

This page is used to monitor any registered user toward his yearly CPD goals.

1. Faculty Member, Resident/Fellow, Internship Student, Medical Professional or Emirati Board Certified Members login to NIHS Portal and access his portfolio (which is created during [registration module-sprint 1](#)).
2. Under his portfolio, He will find “My CPD” section which offers a user-friendly interface for tracking his continuing professional development (CPD) activities.
3. Under “My CPD/MOC” he will find 2 sections:

Category 1

Category 1 activities are **formal CPD activities** that must:

- o Be approved by the NIHS CPD unit (please refer to [log activity](#) section.)
- o Support specific learning objectives and measurable outcomes.
- o Utilize effective learning methods, such as didactic teaching, hands-on practice, simulations, or e-learning. (it will be linked to [NIHS Conference](#) sub-portal to access all current NIHS conference and workshops (online, face to face and hybrid) which NIHS is organizing.
- o Include evaluation mechanisms to assess achievement of learning objectives and impact on practice.
- o The professional activity facilitator, and the trainer shall disclose to NIHS and attendees any educational grants or any forms of commercial support from business, industry, or other entities.

Commented [GU1]: This will follow the category 1 and 2 mentioned in the CPD Policy v1.1

Commented [MK2R1]: Done

Category 2

Category 2 are **Non-formal CPD activities** that are self-directed and less structured but must:

- o Address the participant’s professional needs.
- o Be beneficial to knowledge, skills, or competencies.



- All members shall sign the declaration of conflict of interest. The professional facilitator and the trainer shall disclose to NIHS and attendees any educational grants or any forms of commercial support from business, industry, or other entities.

Commercial Bias:

Commercial bias: Both category 1 and 2 must Ensure content is within ethical guidelines and be free of commercial bias.

4. Under "My CPD/MOC" the user should have "**Transcript Generation**" option to enable him to generate a comprehensive CPD transcript summarizing all activities within a selected date range, formatted for printing or digital sharing.
 5. Under "My CPD/MOC" the user should have real-time dashboard to cover below points
 - **Total CPD Activities:** Display the cumulative number of CPD activities completed by the user, categorized by MOC sections (Section 1, Section 2, Section 3).
 - **Credit Summary:** Present a visual representation (e.g., progress bars) of credits earned versus required for the current cycle, highlighting any shortfalls.
 - **Credit Summary:** Present a visual representation (e.g., progress bars) of credits earned versus required for the current cycle, highlighting any shortfalls.
- N.B The requirement is Total of 40 CPD, of which at least 20 are earned by Category So graph will show "achieved status" only if Category1 is 20 and Total is at least 40.
- **Upcoming Deadlines:** List important dates, such as cycle end dates or upcoming CPD opportunities.

Commented [HN3]: what are cycles? and how are they defined?

Commented [MK4R3]: It is the academic year , each year the student should complete xx credits hours in learning activities

Commented [GU5]: The requirement is Total of 40 CPD, of which at least 20 are earned by Category 1. So graph will show "achieved status" only if Category1 is 20 and Total is at least 40.

Commented [MK6R5]: Done

Commented [HN7]: how are CPD opportunities registered?

Commented [MK8R7]: CPD unit should register it ,NIHS to provide more info

Business Rules:

- Under each activity logged **under** the portfolio (manually or automatic) there should be option to upload or write-down feedback by (CPD team & the user) and to be viewed by (CPD team & the user).
- This CPD portfolio for all users should be visible to CPD team and overall comparative statistical data of the achiever's vs non-achievers in the dashboard can be exported to create an annual report of CPD.

Commented [GU9]: We hope that overall comparative statistical data of the achievers vs non-achievers in the dashboard can be exported to create an annual report of CPD.

Commented [MK10R9]: Done



A. Log Learning activity

To include the activity under his MOC portfolio and to maintain the integrity of credit tracking system, the user should get approval on it or it should be entered by CPD team.

I. Log activity (By attendee):

- 1- Once the activity is completed, the attendee will fill the [logging form](#) and submit it to CPD team.
- 2- CPD team will review and approve, reject or [send back](#).
- 3- Once approved the attendee will find the activity added to his CPD portfolio along with cpd points, it will be added under its category (category1 or category 2) and activity CPD certificate attached (download and print option should be there).
N.B CPD credits for the attendee will be automatic calculated [based on sessions participation](#) (please refer to [CPD policy](#) section)
- 4- In addition, the CPD points statistics will be automatically populated and reflected in his CPD Dashboard statistics.

Required document

- Evidence of attending/completing the claimed CPD activity

Commented [HN11]: what happens on send back? does the user resubmits the log activity form?

Commented [MK12R11]: Send back or rejection should be with comment on changes required or reason of rejection, for send back the attendee will update or add attachment and resubmit

Commented [HN13]: what is a session participation? and who specifies the weight of each session participation

Commented [MK14R13]: as per cpd policy section the points is calculated per hour so :
1-if it is non-NIHS leaning activity he should have proof or certificate of how many hours he takes for this activity
2-if it is NIHS activity so our sub-portals should automatic detect this

II. Log activity (By CPD team-Bulk):

The logging of the activity can be done by NIHS CPD team as a [bulk](#).

- CPD team can upload bulk entries of professionals' names from attendance sheet of specific event/workshop (online, F2F, Hybrid).
- Currently NIHS has simple application to read the attendee **barcode/qrcode** and update the attendance sheet which will be used to log the activities for all attendees in the sheet.
- Mainly these fields (Activity category, activity title, Date, Provider, and the number of hours or credits earned) should be available in uploaded sheet.
N.B : CPD credits for the attendee will be automatic calculated based on sessions participation (please refer to [CPD policy](#) section)
- Once uploaded CRM automatically updates individual profiles, generate [certificate](#) and reflects in real time dashboard statistics.

Commented [HN15]: what is the certificate template?

Commented [MK16R15]: In conferences sub-portal pages



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B. Pages & Forms (Samples)

My CPD/MOC - Main page

NIHS Logo

Name of Professional

Specialty

[Log activity](#) [Download Reports](#)

CPD and MOC Program Requirement Overview

Annual Requirement: 2024-25

40 CPD credits out of which at least 20 shall be of Category 1.

0	20	40

Progress

Category 1:

0	10	20

Category 2

0	10	20

Cycle Requirement: In 5 years, a minimum of 200 CPD points shall be collected.

Year 2024-2025 23/200 credits

0	100	200

You need additional points to meet the annual requirement

Commented [HN17]: what is MOC Program? who defines such programs?

Commented [MK18R17]: MOC is just another name of CPD,

Commented [HN19]: I am seeing Annual Requirements, deadline for annual requirement, cycle requirements, credits, what is the business behind this? how are they connected to program and to users?

Commented [MK20R19]: Yes, for internships. Residents/Fellows students they should obtain xx credits during academic years so as I mentioned here and in registration module My CPD profile is part of users portfolios



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Logging Category 1 Activity

Mainly these fields should be available (Activity title, Date, Provider, and the number of hours or credits earned)

Activity Details

Formal Learning activity

An asterisk (*) indicates a required field

Enter keywords, if nothing, type manually

Activity Title *

Accredited? *

Yes

No

Hours of Participation *

Date of completion

Month *

Year *

One key message learned *

Enter message...

Learning Reflections

Reflection Exercises (Optional)

Documentation (Optional)

SAVE TO DRAFTS

BACK

NEXT

Commented [HN21]: what is Provider?

Commented [MK22R21]: The activity can be NIHS organized activity or non-NIHS organized activity like MOH conference, Arab health conference,,,,, he should attach certificate of attendance or proof of attending

Commented [HN23]: the screenshot mentions Learning Reflections? these are not included in fields section

Commented [HN24R23]: also "one key message learned"

Commented [MK25R23]: these field are for more description about the activity only and optional

Commented [HN26]: what is Accredited checkbox mean?

Commented [MK27R26]: No business behind it is just to make sure the event is meet standards or not



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Logging Category 2 activity

Activity Details

Educational and Quality Improvement Activity

Can be claimed once per initiative per calendar year **Add "Activity Sub-Category DDL drop down list**

An asterisk (*) indicates required field

Describe the focus or title for this activity*

15 credits per year, per initiative

Date of completion

Month *

One key message learned*

Enter message...

Learning Reflections

Reflection Exercises (Optional)

Documentation (Optional)

BACK **NEXT** **SAVE TO DRAFTS**



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Real-Time Dashboard

Typically provides a summary and visual representation of an individual's CPD progress

1. **Total CPD Activities:** Display the cumulative number of CPD activities completed by the user, categorized by MOC sections (Section 1, Section 2, Section 3).
2. **Credit Summary:** Present a visual representation (e.g., progress bars) of credits earned versus required for the current cycle, highlighting any shortfalls.
3. **Upcoming Deadlines:** List important dates, such as cycle end dates or upcoming CPD opportunities.

Example:

- **Total CPD Points Earned:** 80 points (out of 100 required)
- **Completion Rate:** 80%
- **CPD Points Breakdown:**

category 1 Formal Learning: 40 points
Activity

category 2 Educational and Quality Improvement Activity 40 points

Notifications Section:

- **Upcoming Deadlines:**
 - Complete "Advanced JavaScript Programming" by 22nd January.
- **Upcoming Events:**
 - Virtual Career Fair on 15th January.
- **New Opportunities:**
 - Apply for internship in Data Science by 20th January.

Commented [HN28]: who defines upcoming deadlines, events and opportunities?

Commented [MK29R28]: CPD team define this ,we need more info on it



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Download Reports and Certificates

Download Reports

A collection of reports designed around your participation in the MOC Program. From this page you can view, print or download a copy of the reports.

- [Credit Summary](#)
A table of your MOC credits earned in an MOC cycle. The credits are grouped together by section and by year.
- [Yearly MOC Adherence Report](#)
If you have met the minimum annual requirements, the report displays a letter that states you are adherent to the MOC Program.
- [Transcript of CPD Activities](#)
Transcript of CPD Activities displays a list of your CPD activities grouped by year of activity, MOC section or cycle.
- [MOC Cycle Completion Certificate](#)
If you have completed an MOC cycle, the certificate confirms that you have met the requirements of the MOC Program for your current cycle.

Commented [HN30]: can we have sample screenshot from each of these reports please?

Commented [MK31R30]: Requested from NIHs



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Transcript: (Signed & Stamped) by NIHS

Commented [HN32]: how is it signed? who signs it?

Commented [MK33R32]: Signed by SG & Stamped automatically, will provide sample

CPD -Transcript Report

Transcript Report			
Username:			
Date Range:			
Category 1....			
Activity Type	Activity Name	Credits Reported	Completion Date
Category 2....			
Activity Type	Activity Name	Credits Reported	Completion Date



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Example:

Maintenance of Certification Maintien du certificat				
The Royal College of Physicians and Surgeons of Canada				Le Collège royal des médecins et chirurgiens du Canada
Transcript Report				
Username: MoushamedSulaiman Ahmed Saeed Al Hosseini Data Range: January 1, 2023 - December 31, 2023				
Group Learning (Section 1)				
Activity Type	Activity Name	Credits Reported	Credits Applied	Completion Date
Conferences	Clinical Teaching	4.0	4.0	1/2023
Conferences	2nd Annual Sleep Medicine Conference	6.0	6.0	2/2023
Conferences	ETS 2023 Annual Congress	16.0	16.0	10/2023
Conferences	2nd Emirates Conference on Medical Education	12.0	12.0	2/2024
Individual Learning (Section 2)				
Activity Type	Activity Name	Credits Reported	Credits Applied	Completion Date
Feedback and Improvement (Section 3)				
Activity Type	Activity Name	Credits Reported	Credits Applied	Completion Date
Clinical practice guideline development	DON STANDARD FOR SMOKING CESSATION SERVICES IN THE EMIRATE OF ABU DHABI	15.0	11/2024	



Christopher J. Watling MD MMEd PhD
FRCP(C)
Registrar and Chief Executive Officer
Régistraire et Directeur général



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1.2 CPD Policy and Procedure (calculation of CPD points)

The purpose of revisiting the Continuing Professional Development (CPD) framework in the UAE is to propose a unified policy that regulates the accreditation of CPD activities across different healthcare authorities.

This includes academic activities such as exam writing, item writing, examiner duty, vetting of exams, reviewing, and standard-setting.

The policy aims to align these academic contributions with the annual CPD points required for healthcare professionals and integrate national standards while allowing flexibility across various health authorities.

There will be admin page for CPD team through it they can add/update the CPD standard points for each activity category and the system will automatically update the CPD points for each activity the user complete as per configured points.

CPD Activity Categories and Credits

Activity		Category	Credit Rule
Formal Learning activities	Specialized Workshops, conference, formal training sessions	1	1 credit per hour
	Technical Sessions, Seminars,	1	1 credit per hour
	Teaching in formal sessions	1	2 credit per hour
Educational and Quality Improvement activities	• Examination Development Item writing (MCQs) • Clinical-Case Writing	2	1 credit per 5 accepted MCQs 1 credit per accepted case
	Vetting of exams (MCQs, Clinical exams)	2	1 credit per hour in meeting

Commented [GU34]: This entire policy has to be replaced by CPD Policy V1.1.

Please find the link to the new policy below:

[NIHS CPD Policy V1.1 2025.docx](#)

Commented [MK35R34]: Done



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	Standard setting panels	2	1 credit per hour in meeting
	Examination Committee Engagement	2	1 credit per hour in meeting
	Examiner Duty (e.g., clinical exam)	2	1 credit per hour
	Reviewing Exam Content	2	1 credit per hour
	Participation as examiner	2	1 credit per hour
	Accreditation Surveying.	2	1 credit per hour
	Drafting Policy /Guidelines/Accreditation Requirements/ Other Quality Improvement	2	1 credit per hour /2 credit per accepted guideline
	Self-directed and individual learning activity	2	1 credit per hour

Please refer to the complete NIHS CPD Policy just for your reference.

NIHS CPD Policy V1.1
2025.docx

1.3 CPD Compliance

1- Emirati Board Certified Members (Maintenance of Certification - MoC)

Annual MoC Compliance:

Members must meet COD (Continuing Obligations Documentation) requirements annually to maintain their certification.

It is required to have minimum # of points for each section and to be renewed every year

Example: to renew/maintain Emirate Board certification it is required to have minimum of XX CPD point this year.

- Each year's data is archived as "Last Year's Data."
- A new "My CPD" is initiated for the next year (reset CPD profile and archive old one).

2- All Healthcare Professionals in UAE (Professional License Validation - PLV)



- This service allows Healthcare Professionals to view, manage and update CPD points required to maintain their Full-time license (The CPD target is based on the Full-time license category "Physicians, Dentists, Nurses, Allied Healthcare, TCAM & Pharmacists" and Professional License Validity).
- CPD is mandatory for professional license validation (PLV) by relevant authorities (e.g., DHA, DOH, EHS) ([Integration with licensing system for UAE Medical authority to share professional CPD points with them](#)).
- If the professional overachieves the set target, nothing will be carried forward to the next Professional License Renewal. However, if the professional underachieves the target, then the professional license cannot be renewed.

Commented [GU36]: Contact Person: Abdul Muqst

- Easy access to lifetime records of professionals within the NIHS database.

Full-Time License Category	Required Points for License Validity <u>(1 Year)</u>	Required Points for License Validity <u>(2 Years)</u>	Required Points for License Validity <u>(3 Years)</u>
Physicians & Dentists	40 Points	80 Points	120 Points
Nurses & All Pharmacists	20 Points	40 Points	60 Points
Allied Healthcare & TCAM	10 Points	20 Points	30 Points

2. Conferences/Workshops Sub-Portal

NIHS Portal should have sub-portal which list all conference and workshops organized by NIHS for Example ECME (Emirati Conference on Medical Education). please refer to current conference portal <https://conferences.uaeu.ac.ae/ecme3/en/index.shtml>

[\(Question: how the conferences will be added/updated to the portal every year? do we will replace current conference portal\)](#)

[Answer, every year, the previous year agenda, speaker, abstract and annual reports if any, will be archived \(inactive, but visible\) and the new year data will be active. This is what we do to the website.](#)

The sub-portal should have the below sections for each conference.



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- **Agenda:** “No workflow, Accreditation unit will submit and publish directly”.
- **Speakers:** “No workflow, Accreditation unit will submit and publish directly”.
- **Abstract Registration:** “below [workflow](#)”.
- **Conference (Activity) Registration & Fees:** “below [workflow](#)”.
- **Sponsorships:** “No workflow, Accreditation unit will submit and publish directly”.
- **Contact Information:** “No workflow, Accreditation unit will submit and publish directly”.

A. Abstract Registration Workflow

The conferences sub-portal will have option for presenters to submit their abstracts.

Workflow:

1. The author will go to the conference page and press abstract registration the form <https://form.jotform.com/241874979375073> will be opened.
2. He will fill all sub-forms and attach required document then press “Submit” he will receive thank u email.
3. Once the request is submitted it will go to NIHS team to approve it once initial approved done it will go to scientific committee or SMEs.
4. SC or SMEs will hold meeting to review all initial approved abstracts and bulk approval/rejection option should be there
5. Decision selected by committee members
 - a) Approved as short communication
 - b) Approved as Poster
 - c) Approved as both above
 - d) Rejected as irrelevant to the conference theme.Comment box to be provided for qualitative comments
6. **Notification Email** will go to the participant with the decision + feedback comments (if available).
7. The submitters should receive post -conference survey and once they submit the will receive [certificate of participation](#)

Commented [MK37]: Is it same as attendance certificate and is there payment for abstract registration same as attendance fees?

Commented [GU38]: In case the user is registered, data will be updated on the CRM. But if public user, certificate is emailed but the name and CPD credits is recorded in the registration database of conference that he attended.

For any participant to get the certificate & CPD points, following 3 conditions to be met:

1. Registered
2. Attended the conference
3. Completed the Conference feedback form.

Commented [MK39R38]: Done

B. Conference Registration Workflow

The conferences sub-portal will have option for attendees to register for attending.

Question (In case the attendee is public user not registered then no portfolio for him and cpd attendance certificate will be sent to him by email only? please confirm)



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Answer:

In case the user is registered, data will be updated on the CRM. But if public user, certificate is emailed but the name and CPD credits is recorded in the registration database of conference that he attended.

For any participant to get the certificate & CPD points, following 3 conditions to be met:

1. Registered
2. Attended the conference
3. Completed the Conference feedback survey.

Workflow:

1. The attendee will go to the conference page and press “Conference Registration”, the form <https://conferences.uaeu.ac.ae/ecme3/en/emirati-me-registration.shtml> will be opened. offering various registration categories (e.g., early bird, student rates, free option).
2. The attendee will fill the form and the fees will be updated as per the selected category, once he presses submit the system will automatically redirect him to payment gateway to do secure payment ([integration with payment gateway](#)).
3. Upon successful registration and payment, **confirmation email** (along with payment receipts) will be sent to him, including essential details such as event dates, venue, and agenda.
4. On conference date: there will be simple attendance tracking system such as barcode or QR code scanning ([is attendance tracking system already exist or it will be developed with the solution? in case it is out of scope we expect to receive accurate attendees sheet generated from this attendance tracking system to be use in the bulk logging](#)).
 - To monitor participant entry and exit during sessions. This facilitates accurate CPD credit allocation.
 - Track attendance at individual sessions to ensure participants meet the requirements for CPD accreditation.
5. Based on above attendance tracking system the attendance data and CPD credits for the attendee will be **automatic** calculated based on sessions participation (please refer to [CPD policy](#) section) and will be reviewed by CPD unit and once approved it will be reflected to attendee portfolio “My CPD”.
6. Automatic Post-Conference Evaluation [Email](#) should be sent to all participant who are registered and attend the conference to collect their feedback regarding the conference content, organization, and overall experience to inform future improvements.
 - **Feedback Survey:**
 - Post-conference surveys collect attendee feedback.

Commented [GU40]: Integration with UAEU payment gateway required through APIs.

Person to be contacted Abdul Muqsit

Commented [MK41R40]: Done

Commented [GU42]: Not accreditation unit but CPD unit

Commented [MK43R42]: done

Commented [GU44]: Post-Conference Evaluation Feedback form should automatically go to all participants who are registered and attended the conference.

Dr. Asma shared the survey for Post ECME conference evaluation under surveys email.

Commented [MK45R44]: Done



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- o Results are compiled into detailed reports and dashboards.
7. The system will also generate personalized certificates of attendance. Ensure certificates include necessary details such as participant name, conference title, dates, and CPD credits earned and it will be available in My CPD-certificates section as well as notification email will be sent to the attendee with attached certificate.
- Certificates Distribution:**
- a. Automated generation and distribution of attendance/participation certificates for events.
8. The conference sub-portal should have “Content Sharing” section under each conference “Provide access to session recordings and materials”.

C. Pages & Forms

Kindly check below UX interface for Conferences portal

<https://steelblue-dolphin-591342.hostingersite.com/>

The scope of conference module will cover the following dynamic content (CMS)

- Dynamic Agenda
- Speakers Profiles
- Registrations
- Abstract Submission & Review (Approve/Reject)
- Dates & Locations
- Sponsors List (Logos etc)
- Payments

Commented [GU46]: New User Interface will be provided by Abdul Muqst

Commented [MK47R46]: Done

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Home Page

ECME2025

Home About Us ▾ Agenda Speakers Register ▾ Contact Us

Emirati Conference on Medical Education 2025

Register Now

Dates
15 - 16 February 2025

Location
Fairmont Bab Al Bahr Hotel
Abu Dhabi

Contact Us
+971 3 7137578
nhs@uae.ac.ae



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Welcome

Dear Esteemed Guests and Fellow Colleagues,

It is with great pleasure that I extend a warm welcome to each of you to the Emirati Conference on Medical Education 2025, held in the esteemed city of Abu Dhabi. At a time when health professions education is going through explosive growth, we must provide opportunities for exchange of knowledge, collaboration, and professional growth.

The successful Emirati Medical Education Conferences, organized by the National Institute for Health Specialties (NIHS) over the past two years, have become a cornerstone in the field. Building on this success, the NIHS is committed to continuing this series, with the next conference scheduled for February 15-16, 2025.

[About Us](#)[Agenda](#)

ECME2025 Timeline

- 🕒 August 2024
Abstracts Submission Deadline
- 🕒 September 2024
Sponsors Registration Deadline
- 🕒 December 2024
Abstract Result
- 🕒 January 2025
Attendees Registration Ends
- 📅 February 2025
ECME2025 Kick-off

15
Days00
Hours21
Minutes06
Seconds



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Learn from THE BEST experts in the field
Speakers



Dr. Yoon Soo Park
University of Texas College of Medicine



Dr. Mohammed Al Houqani
Secretary General, IAHG



Dr. James Arrighi
Chairman and CEO of Accumed



Mrs. Ziyana Alkhushabi
Cleveland Clinic Abu Dhabi



Dr. Shamsa Abdulmanan
Senior Consultant at CMH-UAEU



Dr. Tahani Al Qadiri
Surgeon Holdings



Dr. Ayesha Saeed Almheiri
Medical internship Program Director



Dr. Gehan Sallam
Clinical research nurse at CMH-UAEU

[View All Speakers](#)

40

Hours of lectures and workshops

12

Reputed Speakers from Industry

3

Days of Discussions & Insights

3500+

Attendees

February
15-16

Fairmont Bab Al Bahr Hotel
Abu Dhabi
United Arab Emirates



Linking to google map to open the location directly from the portal



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A screenshot of a Google Maps search result for "Fairmont Bab Al Bahr - Abu Dhabi". The map shows the hotel's location on the waterfront of the Persian Gulf. The hotel building is visible on the left, and the surrounding area includes roads, other buildings, and landmarks like the Yas Viceroy Hotel. A red pin marks the exact location of the Fairmont Bab Al Bahr.

Agenda Page

Link to Agenda Page: <https://conferences.uae.ac.ae/ecme3/en/conferenceprogram-version1.pdf>

Speakers

HOME ABOUT AGENDA SPEAKERS ABSTRACT SUBMISSION REGISTRATION FEES LOCATION CONTACT

Dr. Yoon Soo Park

Emirati conference on Medical Education – 2025

Dr. Yoon Soo Park

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- *Update content dynamically (e.g., session details, speaker profiles).*
- *Integrate a FAQ and chatbot for user queries*

Abstract Submission Form



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The screenshot shows a website for a conference. At the top, there is a navigation bar with links: Home, About Us, Agenda, Speakers, Register, and Contact Us. A red sidebar on the right contains links for Registration, Abstract Submission, Fee, and Location. Below the navigation, there is a large image of a conference hall with people seated. Overlaid on this image is the word "conference". At the bottom of the page, there is a URL: <https://form.jotform.com/241874979375073>. Below the URL, there is a section titled "Activity Registration Page" with a bullet point: "Automatically generate and send confirmation emails with registration details and invoices".

- Provide dedicated section for abstract submissions with templates and guidelines.
- Allow file uploads (Pdfs, Word, etc.)

Activity Registration Page	
▪ Automatically generate and send confirmation emails with registration details and invoices	



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Emirati conference on Medical Education – 2025

Full Name *

Position *

Specialty *

Specialty * DDL with list of specialties in the system ←

Role In Medical Education *

Organization *

Email *

Mobile *

Gender *

Nationality *

Category *

Amount * 300 AED ← to be calculated based on fees table

I'm not a robot

Submit



[HOME](#) [ABOUT](#) [AGENDA](#) [SPEAKERS](#) [ABSTRACT SUBMISSION](#) [REGISTRATION](#) [FEES](#) [LOCATION](#) [CONTACT](#)

Registration Fees

Category	Early Bird (20% Discount)	Regular Rate
Delegate	480	600
Medical Students	160	200
Member of NIHS Committees	0	0
NIHS Surveyors	0	0
NIHS Examiner	0	0
Trainees	240	300
Speaker	0	0
Sponsor	0	0



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Role in Medical Education *

Institutional Coordinator

Select

- Assistant/Associate Dean
- Designated Institutional Official (DIO)
- Program Director
- Assistant Program Director
- Chair of Department
- Faculty
- Administration/leadership
- Institutional Coordinator**
- Program Coordinator/Administrator
- Resident/Fellow
- Medical Student
- Other (Please specify if Other)

Organization *

Select

Select

- Department of Health – Abu Dhabi
- Dubai Health Authority
- Dubai Health (MBRU)
- Emirates Health Services (EHS)
- Zayed Military Hospital (ZMH)
- United Arab Emirates University (UAEU)
- University of Sharjah
- Abu Dhabi Health Services Company (SEHA)
- Cleveland Clinic Abu Dhabi
- Thumbay Healthcare
- University of Science and Technology of Fujairah
- Ajman University
- City University Ajman
- Other (Please specify if Other)

Category *

NIHS Surveyors

Select

- Delegate
- Medical Student
- Member of NIHS Committees
- NIHS Surveyors
- NIHS Examiner
- Residents/Fellows
- Speaker
- Sponsor

Certificate of attendance

 PDF

Attendance
Certificate ECME 2025



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The certificate template is for the "Emirati Conference on Medical Education 2025" held on 15th & 16th February 2025 in Abu Dhabi, UAE. It is awarded 20 CPD Credit Points by Dubai Health Authority (Accreditation Number #####). The certificate is signed by Dr. Mohammed Al Houqani, Secretary General, National Institute for Health Specialties. The template includes logos for NIHS and UAEU.

Certificate of Attendance

This is to certify that

Alhanouf Khthail

has attended the

Emirati Conference on Medical Education 2025

held on **15th & 16th February 2025** in **Abu Dhabi, UAE**

This Program is awarded 20 CPD Credit Points by Dubai Health Authority
(Accreditation Number #####)

This certificate is not considered an approval for an academic certificate nor a privilege of practicing the trained skills (if any) without appropriate license issued by the Health Regulation Bodies

Dr. Mohammed Al Houqani
Secretary General
National Institute for Health Specialties

D. Notifications Emails

(NIHS to add any notification templates):

- NIHS wants to have the provision of adding custom made template
- The system should provide provision with placeholder to edit the email.

Abstract Registration Confirmation	
Abstract Registration Status	
Event Registration Confirmation Email along with payment receipt if available	event dates, venue, and agenda.
Attendance CPD certificate release	Email with certificate as attachment
Post-Conference Evaluation survey	

Commented [GU48]: NIHS wants to have the provision of adding custom made template.

Commented [MK49R48]: Done

Commented [GU50]: The system should provide provision with placeholder to edit the email.

Commented [MK51R50]: Done

Commented [GU52]: Workflow is as follows:

1. Submitted by users.
2. Users receive thank you email
3. Assigned by NIHS to committee members with bulk editing option.
4. Decision selected by committee members a) Approved as short communication b) Approved as Poster c) Approved as both above d) Rejected as irrelevant to the conference theme. Comment box to be provided for qualitative comments.
5. Final decision with NIHS which shall lead to auto generation of a notification email to the participant.

Commented [MK53R52]: Covered above

Commented [GU54]: This should be a generic email with all contents fixed for the current year conference

Commented [MK55R54]: done

Commented [GU56]: Mr. Abdul Muisit will add the certificate template here

Commented [GU57R56]: Link to certificate is attached for your kind perusal

Commented [MK58R56]: Done

Commented [GU59]: Below is the Conference survey link for the current year. We need flexibility to change this every year as we might change survey questions every year.

Please refer to the survey link below:

<https://redcap.uaeu.ac.ae/surveys/?s=KJ7FPLCPLTN4H3>

Commented [GU60R59]: Yes, there should be an admin page for this and to be provided with privileges to add/edit/delete the contents.

Commented [MK61R59]: Covered in Surveys module



3. NIHS E-Learning Sub-Portal (Individual Learning)

Question: Who is responsible to add the learning material, do we need to add admin page for this process?

Answer:

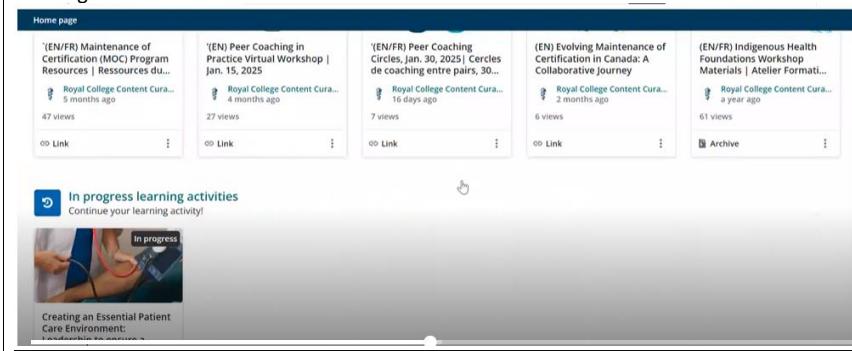
Designated Resource persons or educators or admin from NIHS should be added. Then they can upload learning material or quizzes and based on score can decide if they completed or not. Can we generate certificate automatically? Can we add conditions that they have to read or score in a quiz or complete survey?

Commented [GU62]: Designated Resource persons or educators or admin from NIHS should be added. Then they can upload learning material or quizzes and based on score can decide if they completed or not. Can we generate certificate automatically? Can we add conditions that they have to read or score in a quiz or complete survey? Mr. Abdul Muqsid can be consulted

Commented [MK63R62]: done

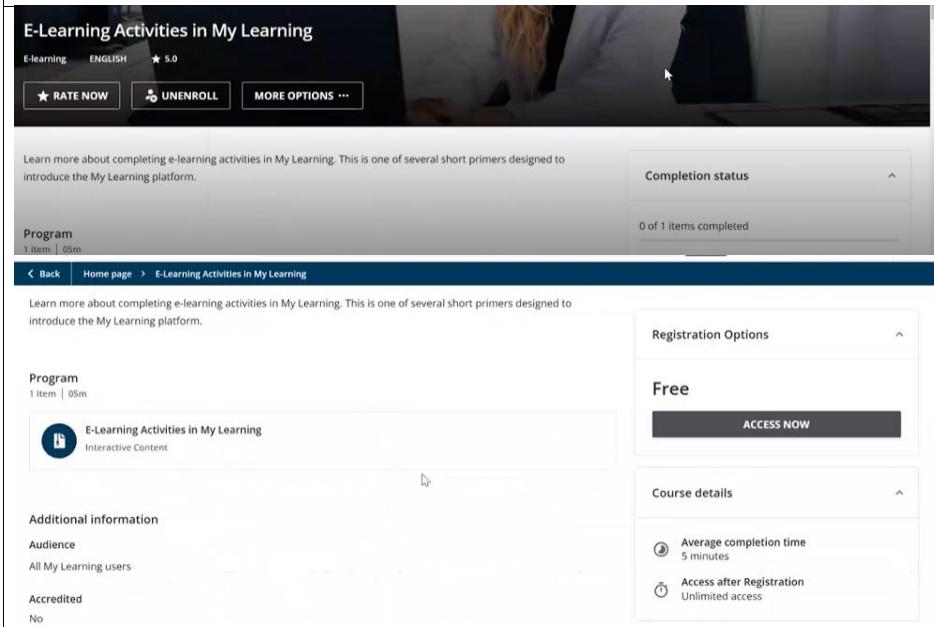


1- Personalized home page for each user to show all videos section and his in progress/completed learning activities.



The screenshot shows a personalized home page with a grid of video thumbnails. Each thumbnail includes the title, date, views, and a link icon. Below the grid, there is a section titled "In progress learning activities" with a thumbnail showing a person working on a patient care environment.

2- details page for each learning material



The screenshot shows a details page for an e-learning activity. At the top, it displays the title "E-Learning Activities in My Learning", the category "E-learning", the language "ENGLISH", and a rating of "5.0". Below this, there are buttons for "RATE NOW", "UNENROLL", and "MORE OPTIONS ...". The main content area includes a video thumbnail, a brief description, and sections for "Completion status" (showing "0 of 1 items completed"), "Registration Options" (showing "Free" and a "ACCESS NOW" button), and "Course details" (showing average completion time as 5 minutes and access after registration as unlimited). On the left side, there are sections for "Program" (1 item, 05m), "Additional information" (Audience: All My Learning users, Accredited: No), and a sidebar for the course itself.



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Learn more about completing e-learning activities in My Learning. This is one of several short primers designed to introduce the My Learning platform.

Program
1 item | 05m

3- Link the completed course with user portfolio individual learning section and update his credits points and statistics

Courses

COURSE CODE	COURSE TITLE	USER STATUS	ENROLLED	EXPIRATION DATE	COURSE COMPLETION	ROYAL COLLEGE MOC CREDITS	TOTAL TIME	SCORE
	Creating an Essential Patient Care Environment: Leadership to ensure a foundation and accountable patient partnership in healthcare	IN PROGRESS	12/19/2024			0.50	h 4m	
	E-Learning Activities in My Learning	COMPLETED	12/20/2024	12/20/2024			h 2m	0.00

Total: 2

Progress

0 (0%) TO BEGIN
1 (50%) IN PROGRESS
1 (50%) COMPLETED

See all activity within the last 12 months

Month	Count of Training Material Access
Jan	0.0
Feb	0.0
Mar	0.0
Apr	0.0
May	0.0
Jun	0.0
Jul	0.0
Aug	0.0
Sep	0.0
Oct	0.0
Nov	0.0
Dec	2.2

4. Milestones

The Milestones are designed only for use in evaluation of residents in the context of their participation in NIHS-accredited residency programs. The Milestones provide a framework for the assessment of the

Commented [HN64]: there are no requirements defined for Milestones. Only the definition of milestone is mentioned, and screenshots

Commented [MK65R64]: Milestones is part of Students portfolios which should be updated, reviewed during the academic year ,below forms section added recently to this module



residents'/fellows' development in key dimensions of the elements of core competencies in a specialty or subspecialty. They neither represent the entirety of the dimensions of the six domains of physician competency, nor are they designed to be relevant in any other context.

Milestones will be accessed through the portal in order to fill out the forms attached below, the same way surveys are used. They define the progress of each resident/fellow that is registered in the system. The results of those Milestones will be reflected onto the profile/portfolio of each of these Residents/Fellows depending on the form being used and the program registered in, and will be reflected onto dashboards and reports (Further explained in the dashboard and analytics part of the project).

What is a Milestone?

Milestones, which programs use in a semi-annual review of resident performance, are reported to the NIHS. Milestones are knowledge, skills, attitudes, and other attributes for each of the Core Competencies organized in a developmental framework.

The narrative descriptions are targets for resident/fellow performance throughout their educational program. Milestones are arranged into levels. Tracking from Level 1 to Level 5 is synonymous with moving from novice to expert resident/fellow in the specialty or subspecialty. For each reporting period, the Clinical Competency Committee will review the completed evaluations to select the milestone levels that best describe each learner's current performance, abilities, and attributes for each sub-competency.

These levels do not correspond with post-graduate year of education. Depending on previous experience, a junior resident/fellow may achieve higher levels early in his/her educational program just as a senior resident/fellow may be at a lower level later in his/her educational program. There is no predetermined timing for a resident/fellow to attain any particular level. Residents/fellows may also regress in achievement of their milestones. This may happen for many reasons, such as over scoring in a previous review, a disjointed experience in a particular procedure, or a significant act by the resident/fellow. Selection of a level implies the resident/fellow substantially demonstrates the milestones in that level, as well as those in lower levels.

Moreover, level 4 is designed as a graduation goal but does not represent a graduation requirement. Making decisions about readiness for graduation and unsupervised practice is the purview of the program director. Furthermore, Milestones shall not be used as a sole assessment in high-stakes decisions (i.e., determination of eligibility for certification or credentialing). Level 5 is designed to represent an expert resident/fellow whose achievements in a sub competency are greater than expected.

Milestones are primarily designed for formative, developmental purposes to support continuous quality improvement for individual learners, education programs, and the specialty. The NIHS and its partners will continue to evaluate and perform research on the Milestones to assess their applicability, impact, and value as well as their potential in being assimilated into EPA framework. Examples are provided for some milestones within this document.

Examples on the milestone perspective are shown in the screenshots below.



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Patient Care (PC) 5: Management of Procedural Care				
Level 1	Level 2	Level 3	Level 4	Level 5
Identifies the breadth of procedures that family physicians perform (PC 5.1.a) Recognizes family physicians' role in referring patients for appropriate procedural care (PC 5.1.b)	Identifies patients for whom a procedure is indicated and who is equipped to perform it (PC 5.2.a) Counsels patients about expectations for common procedures performed by family physicians and consultants (PC 5.2.b)	Demonstrates confidence and motor skills while performing procedures, including addressing complications (PC 5.3.a) Performs independent risk and appropriateness assessment based on patient-centered priorities for procedures performed by consultants (PC 5.3.b)	Identifies and acquires the skills to independently perform procedures in the current practice environment (PC 5.4.a) Collaborates with procedural colleagues to match patients with appropriate procedures, including declining support for procedures that are not in the patient's best interest (PC 5.4.b)	Identifies procedures needed in future practice and pursues supplemental training to independently perform (PC 5.5.a)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments:	Not Yet Completed Level 1 Not Yet Assessable			

PS: Reports will be provided to residents/fellows for feedback (Check screenshots below).

Academic Year Administration Window

2018 - 2019 ▾ 2018-2019 ACGME Year-End Milestone Evaluations ▾ Search

Downloads and Aggregate Reports ▾

- Download Data
- Program Level Report
- Specialty Level Report

Filter Results

Resident	Year In Program	Status
First Name, Last Name	2	Active Full time ✓
First Name, Last Name	3	Active Full time ✓
First Name, Last Name	2	Active Full time ✓
First Name, Last Name	3	Active Full time ✓
First Name, Last Name	3	Active Full time ✓
First Name, Last Name	2	Active Full time ✓

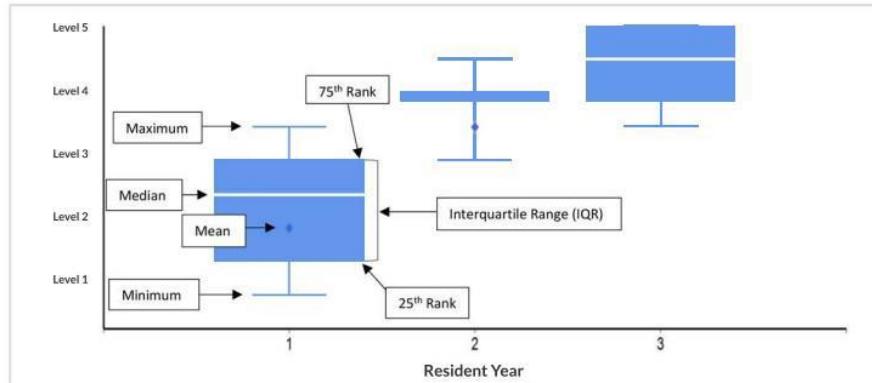
Reports ▾ View Evaluation

Narrative
Summary
Trends

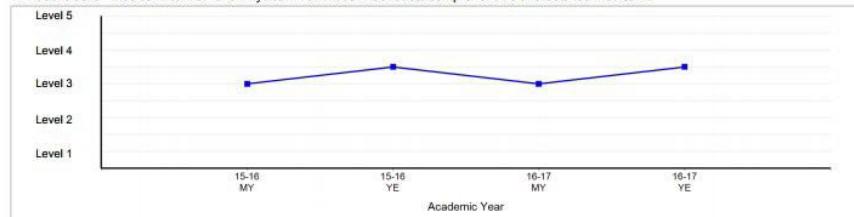


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Competency - Subcompetency



1. Patient Care - Medical Interview and Physical Examination: Conducts comprehensive and detailed medical ...



Forms of these Milestones can be found below attached:

Milestones Forms

5. Documentation Management

Intalio Document is a standard, scalable, open, and full-featured solution for the management of enterprise documents. It covers all phases of a document life-cycle: Imaging and Capture, Processing, Storage, and Publishing. Therefore, organizing your documents and making them more accessible will be much easier.

1.4 Homepage

The homepage is divided into 4 main sections:

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Commented [HN66]: Is there any integration requested by the portal and DMS?

Commented [RS67R66]: No integrations were requested..Their request only was explicitly to store their documents and policy documents and be able to edit them while tracking the needed.



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The screenshot shows the intalio document management system. At the top, there is a navigation bar with a search bar labeled "Full Text Search" and a dropdown menu set to "All". Below the search bar are several tabs: Home, Favorites, Subsites, Search, Upload Files, Routes, Reports, and Others. On the far right of the top bar is a user profile icon. To the left of the main content area is a "Tree Panel" containing a tree view of document categories under "Pre-Sales", such as Marketing, Pre-Sales Projects, Presentations, and Templates. Below the Tree Panel are two filter dropdowns: "Filter By Date" and "Filter By Type". The main content area features a "Files Statistics" section for the year 2018, showing a bar chart with the following data: 243 files viewed in May, 0 files uploaded, and 0 files updated. There are also sections for "Recent Files" (which shows "No matching records found") and "Favorites" (with a link to "My Favorites").

- The navigation pane holding the document classification containing main document cabinets and subfolders created according to the customers filing plan.
- The quick filter menu, allowing to quickly find documents by filtering by Date and Type.
- The quick links bar giving end-users easy access to some of the more commonly used features in the system.
- The tabs on the right displaying the various documents available in each container. The system provides a multiple-tabs interface allowing to open and view different document containers without the need to re-load the entire system



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1.5 Document Classification and Taxonomy

A Cabinet is an electronic container (or electronic shelf) to place and organize electronic documents. Folders can be created within a Cabinet for further classification. An authorized user can create, view, and update documents and folders within a cabinet.

1.5.1 Adding Cabinets and Folders

New Cabinet

Name

Cabinet Name *

Templates

Template Normal

Content Types

Specify whether to allow the management of content types on this cabinet. Each content type will appear on the new button and can have a unique set of columns, workflows and other behaviors:

File Version History

Specify whether a version is created each time you edit a file in this cabinet:

Required Check Out

Specify whether users must check out documents before making changes in this cabinet:

Save Close

1.5.2 Adding a folder

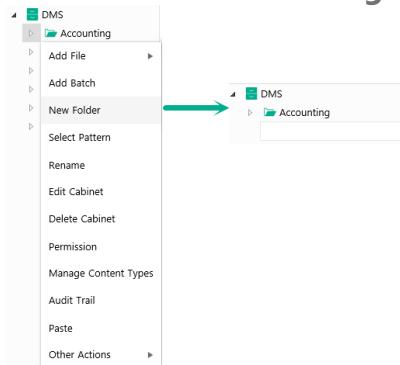


Figure: Adding a Folder



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If a cabinet contains many items that can be grouped in a particular way, users can use folders to organize content within the cabinet, by adding as many folders and sub-folders in the structure as needed.

Authorized users can at any time rename a folder, delete a folder, assign, view and edit properties (metadata) to the folder itself.

The screenshot shows the Intalio DMS interface. On the left, there is a navigation tree with nodes like 'DMS', 'Accounting', and 'Invoices'. Under 'Invoices', there are options for 'Add File', 'Add Batch', 'New Folder', 'Select Pattern', 'Rename', 'Delete Folder', 'View properties', 'Edit Properties' (which is highlighted with a red box and has a green arrow pointing to it), 'View Files', 'Permission', 'Manage Content Types', 'Audit Trail', 'Explorer Viewer', and 'Other Actions'. To the right, a modal window titled 'Invoices - Properties' is open. It has a 'Save' button and a 'Close' button. Inside, there is a 'Content Type' dropdown set to 'Folder' and a 'Name*' input field containing 'Invoices'. A red box highlights the 'Edit Properties' option in the sidebar and the 'Name*' input field in the modal.

For an intuitive end-user experience, Intalio provides the ability to manage folders easily, similarly to the windows explorer experience, providing the ability to Copy/Cut any folder and paste it under a cabinet or under another folder in addition to deleting any unwanted folder.



1.5.3 Patterns

Intalio Document provides the ability to create document patterns. Patterns are pre-configured filing plan templates that can be created once, and used on several cabinets, or folders to easily re-create a folder structure eliminating the need for end users to manually re-create filing plans that follow a similar structure.

The screenshot shows a file explorer-like interface. On the left, there's a tree view with 'DMS' expanded, showing 'Accounting' and 'Invoices'. 'Invoices' is selected and highlighted with a grey background. A context menu is open over the 'Invoices' folder, listing various actions: 'Add File', 'Add Batch', 'New Folder', 'Select Pattern' (which is highlighted with a green border), 'Rename', 'Delete Folder', 'View properties', 'Edit Properties', 'View Files', 'Permission', 'Manage Content Types', 'Audit Trail', 'Explorer Viewer', and 'Other Actions'.



1.5.4 Managing Document and Content Types

Document / content types enable organizations to organize, manage, and handle content more effectively across a folder structure / filing plan. Specific document types are mapped to one or multiple document cabinets or folders ensuring that users will only be able to add / manage specified document types in specified folder locations reducing errors and standardizing document organization and classification.

Visible	Content Type	Position From Top
<input checked="" type="checkbox"/>	Document	1
<input checked="" type="checkbox"/>	Employee	2

Figure: Document Types

1.5.5 Managing Document Attributes (Indexing Metadata)

Furthermore, each document / content type will contain a set of pre-defined attributes (indexing metadata) associated with this category, according to the customer requirements. There are no limitations to the number and type of attributes that can be created and configured for each document type.



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Upload Single File - Manage Filing Plan

Content Type	Image
Name*	Official Image
Title	The General Manager
Keywords	General; Manager; Image;
Comments	Taken officially by The ministry photographer
Author*	Mazen Farah
Date Picture Taken*	24/07/2018
Copyright*	@Ministry

Figure: Document Attributes

1.5.6 Creating Logical Filing Plan

Intalio Document provides the ability to create a logical representation of a document classification whereby a folder structure will be automatically generated using document metadata entered. This will give users the ability to generate a customized classification plan, regardless of the document's / folders physical location.



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Filing Plan

Save | Clear | Close

General Information

Name *	Filing Plan
Location *	DMS/Legislations

Fields

Content Type *	Image	Author	Comments	Copyright	Date Picture Taken
Field	Image	Author	Comments	Copyright	Date Picture Taken
Field	Image	Author	Comments	Copyright	Date Picture Taken
Field	Image	Author	Comments	Copyright	Date Picture Taken

Patterns

Pattern	Select Pattern	+
---------	----------------	---

Figure: Creating a Filing Plan

Filing Plan

Select |

- Legislations
 - Author
 - Comments
 - Copyright

Date Picture Taken/Year

Figure: Logical Filing Plan



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1.6 Adding Documents to the DMS

1.6.1 New Document Based on Template

Intalio Document allows users to create documents based on a pre-defined template in a specific document cabinet. Document attributes can be used to automatically fill in document content according to the pre-configured template.

The screenshot shows the Intalio DMS interface. On the left is a tree panel with 'Pre-Sales' selected. The main area shows two files: 'For presales revised 2.docx' and 'Next programming guru.pptx'. A context menu is open over the first file, with 'New Document' highlighted in green. Other options in the menu include 'Upload Single File', 'Upload Multiple Files', and 'Scan File'. The top navigation bar includes 'Full Text Search', 'Home', 'Favorites', 'Subsites', 'Search', 'Upload Files', 'Routes', 'Reports', 'Others', and a user icon.

Figure: Template Based Document

1.6.2 Upload Electronic Documents

Users have the possibility to upload one or multiple electronic documents to a cabinet/folder or replace an existing file with a new version. If the cabinet is configured to track versions of files, you can add the new file as a new version, which becomes part of the version history of the file.

This screenshot is similar to the previous one, showing the 'New Document' option in the context menu. However, the menu now shows 'Upload Single File' as the selected option. The rest of the interface and navigation bar are identical.

Figure: Upload Electronic Document

Uploading documents through drag and drop is also supported.



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1.6.3 Scan Documents

Intalio Document provides users with an easy web scanning capability allowing to connect to the scanner and upload scanned documents directly into the system.

The screenshot shows the 'Scan Files' interface. On the left, there's a sidebar with 'Scan Properties' settings: 'Show UI' (unchecked), 'ADF Enabled' (unchecked), 'Scan Both Sides' (unchecked), 'Black/White' (radio button), 'Gray' (radio button), 'RGB' (radio button selected), and a 'Resolution' dropdown set to '100'. At the top right are buttons for 'Scan' (camera icon), 'Upload' (cloud icon), and 'Close' (X). Below these are buttons for 'File Name' (text input), 'Remove' (trash icon), 'Remove All' (trash icon), 'Move Up' (up arrow icon), 'Move Down' (down arrow icon), 'Rotate Left' (left arrow icon), and 'Rotate Right' (right arrow icon).

Figure: Scan Document /Files

1.7 Working with Documents

Several document actions can be performed on a document with Intalio Document, these include:

- Show details
- View File Properties
- Edit File Properties
- Edit Multiple Properties
- Cut/Copy and Paste File
- Delete File
- Check in / Checkout / Undo Checkout
- Send by Email
- Download
- Links
- Version History
- View File
- Add to Favorites

Title	Description	Screenshot
Document Title	Document Description	



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Document Details	Ability to display file related metadata in the document list including file size, current version number, creator, viewers and modifications	<p>Figure: Document Details</p>
View File Properties. Edit File Properties	Displays associated document attributes / metadata in view only mode. Ability to edit document attributes / metadata if authorized	<p>Figure: Document Metadata</p>
Cut / Copy / Paste / Delete	Ability to apply general clipboard actions (Copy/Cut) any file and Paste it under a cabinet or under another folder. In addition to deleting unwanted files. (permissions must be granted)	
Check-In / Check-Out / Undo Checkout	When enabled, authorized users will not be able to apply any modifications on any documents prior to checking it out. This is important in order to prevent multiple users from editing the same document at the same time when a document is checked out by a user, all other users can only open it in read-only mode. Checking-in the document by the editor will publish it as a new version on the system, allowing other users to see the changes. If a document is checked out by mistake, the user can undo the operation.	



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A screenshot of the intalio interface showing a list of files. The first item, "DOC 1 (2).pdf", is checked out. A context menu is open over this item, with the "Check Out" option highlighted and surrounded by a green box. Other options in the menu include Open, Check In, Discard Check Out, Delete, View properties, Edit Properties, Copy, Cut, Permission, View File, and Go To Location. At the bottom of the menu, there is a "Other Actions" section.

Name	Modified	Modified By
DOC 1 (2).pdf	14/02/2017 10:51 PM	Sari WEHBE
Open	14/02/2017 10:18 PM	System Account
Check Out	14/02/2017 9:45 PM	System Account

Figure: Check Out

A screenshot of the intalio interface showing a list of files. The first item, "DOC 1 (2).pdf", is checked in. A context menu is open over this item, with the "Check In" option highlighted and surrounded by a green box. Other options in the menu include Open, Check Out, Discard Check Out, Delete, View properties, Edit Properties, Copy, Cut, Permission, View File, and Go To Location. At the bottom of the menu, there is a "Other Actions" section.

Name	Modified	Modified By
Open	14/02/2017 10:51 PM	Sari WEHBE
Check Out	14/02/2017 10:18 PM	System Account
Check In	14/02/2017 9:45 PM	System Account

Figure: Check In

In the Comments area, the user can add a comment that describes the changes made. This step is optional but recommended as a best practice. Check-in comments are especially helpful when several people work on a file.



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Check In

Save | Close

Add Comments

Send by Email

Send | Close

To * []

Cc []

Bcc []

Subject * []

Item Type * Attachment

Attachment []

Normal | Attachment

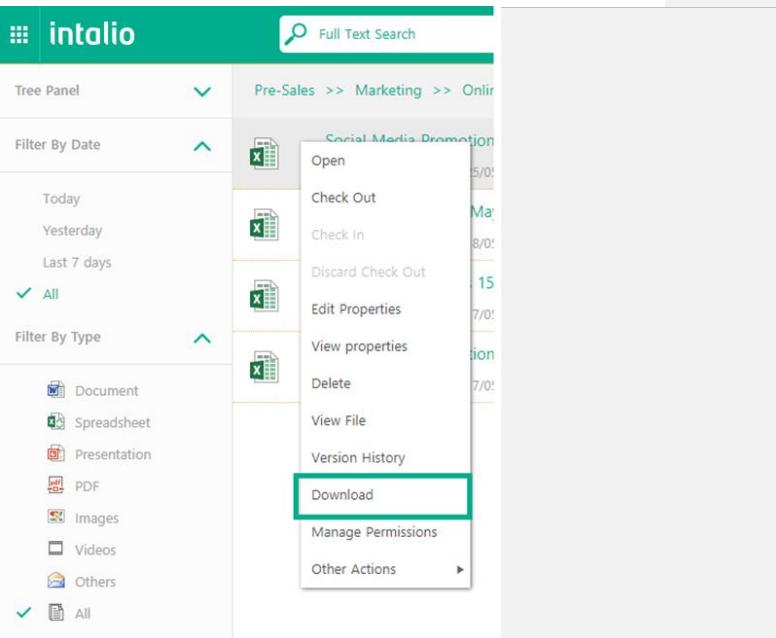
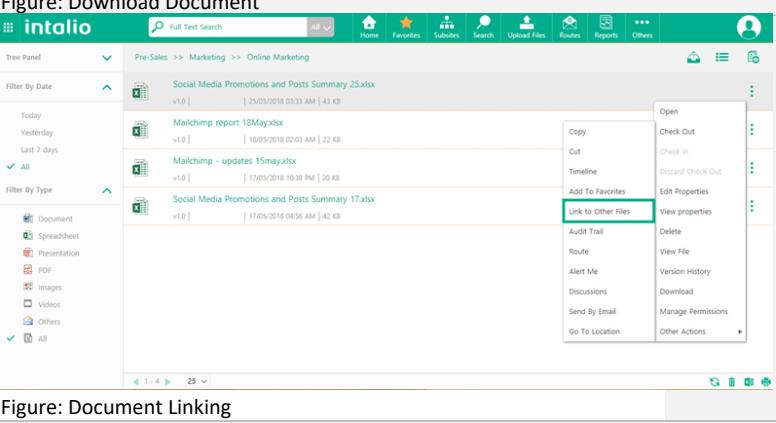
Figure: Check in Comments

Send by email Using Intalio solutions, users are capable of sending files as an email attachment or link.

Figure: Send by Mail



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Download	This feature allows users to download files and documents from the system locally, if permission is granted	
Links	Users can link one or more files of their choice	
Version History	When versioning is enabled, versions are created in the following situations: When a file is first created or uploaded into the system. When a file is uploaded that has the same name as an existing file and the "add a new version to the existing files" check box is selected. When the properties of a file are modified. When a file is opened, edited, and saved. A version is created upon saving.	



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When versioning is enabled in a specific folder or cabinet, users can store, track, and restore files whenever they change. Authorized users can also look form previous versions of the file and recover them, if necessary.

Version History - DOC 1 (2).pdf

Delete All Versions | Delete Minor Versions | Close

No.	Modification Date	Modified By	Size	Comments
2.1	16/02/2017	System Account	151 KB	
1.0	15/02/2017	Sari WEHBE	151 KB	

< > Page 10 of 2 Items

Figure: Document Versioning

View File	Selected file will be displayed in the integrated advanced document viewer	Refer to section 1.3 for more details about the viewer
Add to Favorites	Adding document to Favorites to provide quick	

Document View - Here_is_why_i_like_what_i_do.pdf

File |

Thumbnails |

Annotations |

Figure: Image Viewer



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	access to most used and accessed documents.	
--	--	--



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1.8 Searching for Documents

1.8.1 Content Search

Content search provides the ability to search within the content of the documents. Search keywords are highlighted in the document attributes or document content.

The system provides full-text search capabilities supporting fuzzy, synonym, phonic, Boolean, wild card, phrase, and proximity searches. The system also provides auto correction suggesting similar keywords.

The screenshot shows the intalio DMS interface. On the left, there's a tree panel with categories like 'DMS' expanded, showing 'Batch Archives', 'Current Process at the NAI', 'Document Versions', etc. In the center, there's a search bar with 'Nat' typed in. A dropdown menu below the search bar lists suggestions: 'National', 'Nat', 'NAtiona', 'nut', 'nit', 'not', 'net', 'neat', and 'n at'. The background shows a blurred view of the DMS interface with document thumbnails.

Figure: Auto-Correction with Auto-Suggestions

The screenshot shows the intalio DMS search results for the query 'national'. The results page includes a header with navigation icons and user information. Below the header, three documents are listed: 'National Archives.docx', 'nact221999 (1).pdf', and 'GN1402001.pdf'. Each document entry shows its title, version, date, size, and a preview of its content. The content preview for 'National Archives.docx' includes the word 'NAtiona' which is highlighted in yellow, matching the search term.



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Figure: Content Search

The screenshot shows the intalio Content Search interface. The search bar at the top contains the query "national". The left sidebar includes a Tree Panel, a Folder Search section, and a DMS section with categories like Batch Archives, Current Process at the NAD, Document Versions, Historical Images (which is selected), Legislations, Location Pins, Other, Publications, Research, Resources, and Service Catalog. A Filter By Date section is also present. The main area displays "Search Results" for "national". One result is "National Archives.docx" (v2.1) located in the System Account, uploaded on 18/07/2018 at 3:17 PM, and is 18 KB. It has a "Details" section showing DEFAULTENCODINGURL and ORIGINALPATH. Another result is "nact221999 (1).pdf" (v1.1) from the System Account, uploaded on 17/07/2018 at 3:24 PM, and is 57 KB. This PDF contains searchable text layers. A third result is "GN1402001.pdf". On the right, a viewer window is open for "National Archives.docx", showing its contents. Below the viewer is a "Thumbnails" section with a single item. At the bottom, there is a message about activating the system.

Figure: Content Search

The viewer provides search results highlighted to users.

Scanned documents with a searchable text layer can be indexed and searchable.



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1.8.2 Folder Search

Searching within folders is another search option provided by the system. Keywords are also highlighted in yellow.

The screenshot shows the intalio DMS interface. On the left, there is a tree panel with a search bar containing 'm'. A red box highlights the search bar. Below it, the 'DMS' section is expanded, showing various categories like 'Batch Archives', 'Current Process at the NAI', etc. The main area displays a list of search results:

Folder	Owner	Last Modified	Type	Details
Mazen	Mazen	20/07/2018 10:59 AM	System Account	1 Folder(s) 0 Document(s)
MNA	MNA	20/07/2018 10:59 AM	System Account	1 Folder(s) 0 Document(s)
Germany	Germany	15/05/2018 11:39 AM	System Account	0 Folder(s) 0 Document(s)
United Kingdom	United Kingdom	15/05/2018 11:40 AM	System Account	0 Folder(s) 0 Document(s)
Belgium	Belgium	15/05/2018 11:45 AM	System Account	4 Folder(s) 0 Document(s)
Documentation	Documentation	15/05/2018 11:45 AM	System Account	0 Folder(s) 1 Document(s)
Employees	Employees	15/05/2018 11:45 AM	System Account	2 Folder(s) 0 Document(s)
Personal Documents	Personal Documents	15/05/2018 11:45 AM	System Account	0 Folder(s) 0 Document(s)

At the bottom, there is a navigation bar with page numbers and a total count of 28 items.

Figure: Folder Search



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1.8.3 Search Within Search Results

The system allows to search within search results narrowing the search scope further providing more accurate results.

The screenshot shows the intalio DMS interface. On the left is a tree panel with categories like 'DMS' expanded, showing sub-items such as 'Batch Archives', 'Current Process at the NAI', 'Document Versions', etc. The main area displays a search result titled 'DMS - To search for cabinets/folders.' It lists several items, each with a small icon, a name, a date, and a brief description. For example, one item is 'Documentation' from 15/05/2018 11:45 AM. The search bar at the top has 'national' typed into it.

Figure: Search Within Search Results

1.8.4 Advanced Search

The Advanced Search allows users to narrow down the focus of the search by including more details.

Users can add search criteria, check **Include Subfolders** to search in folders and subfolders.

The screenshot shows the intalio Advanced Search interface. On the left is a tree panel with 'All' selected. The main area is titled 'Employee Marketing Search'. It features a search bar with 'Search', 'Reset', and 'Save' buttons. Below the search bar are two tables of search criteria. The first table includes columns for 'Content Type' (Document), 'Name' (Contains), 'Title' (Contains), 'Created' (Equal), and 'Modified' (Equal). The second table includes columns for 'Document Modified By' (Contains) and 'Document Created By' (Contains), both with input fields for names or email addresses. A checkbox 'Show Sub Folders Documents' is also present.

Figure: Advanced Search



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For numeric fields, the system allows indexing searches based on ranges of field values specified by the following relational expressions: equals, does not equal, greater than, less than, greater than or equal to, less than or equal to, between, at least, and no older than.

For text fields, the system allows indexing searches based on exact or partial matches of specified field values.

1.8.5 Document Routing and Visual Tracking

Intalio Document includes document routing capabilities allowing to route documents to specific users to perform specific actions. It does not provide an advanced workflow module, as this is covered in Intalio Correspondence, however allows to perform one step circulation of documents from a user to another to take a specific action.

The screenshot shows the Intalio Document interface. On the left, there's a tree panel with filters for date (Today, Yesterday, Last 7 days, All) and type (Document, Spreadsheet, Presentation, PDF, Images, Videos, Others). The main area shows a document titled "Here_is_why_I_like_what_i_do" with versions v4.0 and v1.0. A context menu is open over the v4.0 version, listing options like Open, Check Out, Copy, Cut, Timeline, Add To Favorites, Link to Other Files, Audit Trail, Route (which is highlighted with a red box), Alert Me, Discussions, Send By Email, and Go To Location. The top navigation bar includes Home, Favorites, Subsites, Search, Upload Files, Routes, Reports, and Others.

Figure: Routing



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The following window will open:

Route

- Close

Send | Close

Route On	Here_is_why_i_like_what_i_do
Route To *	Enter a name or email address...
Purpose *	Select Purpose
Expiry Date	
Comments	

Figure: adding a new route

Route To: the name or the email address of the recipient

Purpose: the routing purpose (for information, for approval, ...)

Expiry Date: the expiry date after which the route is overdue

Comments: add your comments



1.8.6 Inbox Routes

Sent and Received routes will appear in the Quick links bar by clicking on Inbox Routes icon in Quick Links bar.

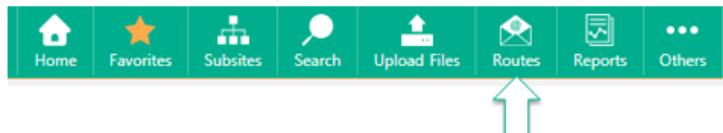


Figure: Routes Menu

The following list will appear:

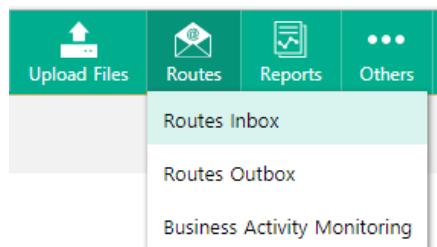


Figure: Inbox

The following buttons appear for each file:

- ✖ Close Route: close the route after adding your comments if available
- ✉ Approve Route: the route will be approved after confirmation
- ✉ Reject Route: the route will be rejected after confirmation
- ✉ Route: route the file to another user
- ✉ Reply: reply to the receiver and add the reply comments



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Route

Reply Close

Purpose: Select Purpose

Comments: No Comment

Reply comments:

Figure: Route Purpose

Once the file is sent as reply, the reply button will disappear.

- ⌚ View: Open the file in Intalio Viewer
- ⌚ Visual Tracking: represents visually how the file is progressing as shown below.

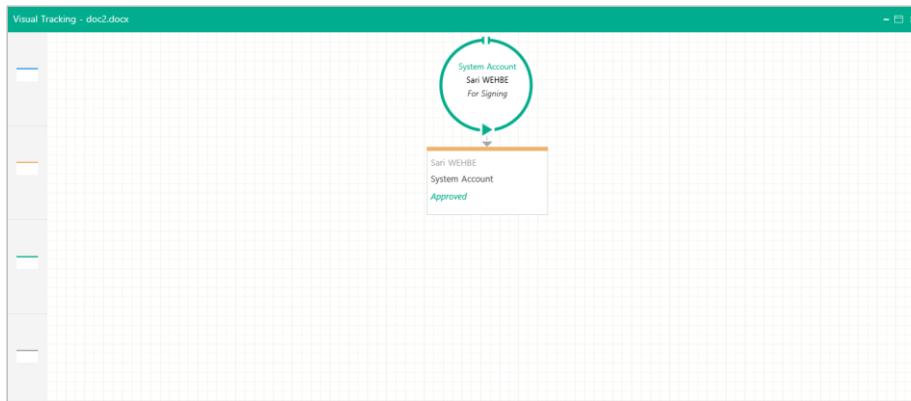


Figure: Visual Tracking

Each color represents a different status.

By clicking inside the rectangle user can view the route details.



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Route Details	
From	Sari WEHBE
To	System Account
Expiry Date	
Send Date	17/02/2017
Close Date	
Purpose	For Information
	<i>No Comment</i>
Comments	Reply
	<i>No Comment</i>

Figure: View Action Details



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1.8.7 Outbox Routes

Click on Outbox Routes icon in Quick Links bar.

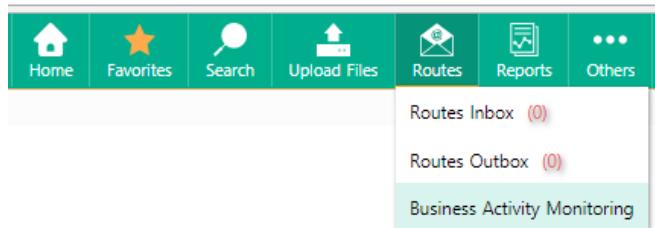


Figure: Outgoing Routes

The Outbox Routes will open.

Visual tracking button will appear allowing the user to visually track the file progressing.

1.9 Out-of-the-Box Reports

Intalio Document provides standard out-of-the-box reports. These include:

- Annual Growth Report
- Content Type Report
- User statistical Report
- User / Group permission Report

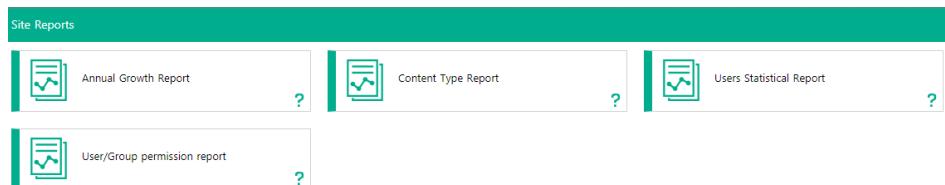


Figure: DMS Reports

In addition, specific out-of-the-box reports for each cabinet / folder are provided. These include:

- Annual Growth Report
- Number of Documents per Content type
- Users Statistical Report
- Content types configuration Report
- Security Report
- User/Group permission report



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- Permission change report
- Classified files actions report

The screenshot shows a grid of report cards under the heading 'Company Presentation - Reports'. The cards include:

- Annual Growth Report
- Number of documents per content type
- Users Statistical Report
- Content Types Configuration report
- Security Report
- User/Group permission report
- Permission change report
- Classified files actions report

Figure: Folder Reports

1.10 Language Management

Users can choose their preferred language to make their work easier and seamless.

The screenshot shows the Intalio Document interface in Arabic. The top navigation bar includes links for 'Account', 'الآخرين' (Others), 'ملف' (File), 'تعديل الملفات' (Edit file), 'البحث' (Search), 'الملفات المفضلة' (Favorites), and 'المقدمة الفنية' (Technical introduction). The main area displays a chart titled 'احصائيات الملفات لعام 2018' (File statistics for 2018) with data:

تصنيف الملف	النسبة المئوية (%)
موافق	75
غير موافق	25

Below the chart, there are sections for 'الملفات المفضلة' (Favorites) and 'الملفات الأخيرة' (Recent files), showing three files: KB 143 [AM 11/01 20/07/2018] System Account | v0.1, KB 219 [AM 11/01 20/07/2018] System Account | v0.1, and KB 143 [AM 11/01 20/07/2018] System Account | v0.1. The right side of the screen features a sidebar with filters for 'لوحة التحكم' (Control panel), 'البحث في الملفات' (Search in files), 'DMS', 'لائحة حسب النوع', and 'الكل' (All).

Figure: Intalio Document in Arabic

- Records Management Capabilities

This feature allows users to add a retention rule to be applied on different document profiles / document / content types specifying the records that need to be retained, the retention period, the physical storage location etc.



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Add Record

- □ ✕

 Save | Close

Apply Rules

Rule Name *

Apply retention rules on *



Starting point

Retention Field *

Retention period

Period *

0 Year(s)

Extraction Destination

Notification *

1

Figure: Records Management



1.11 Permission Management

In some cases, cabinets, folders or files might contain content only meant for certain users or groups. For example, you might create a new cabinet or folder for a special project, and want to ensure that only people who work on that project can access it.

To restrict access, Intalio Document allows users to set the permissions for the cabinet, folder or file.

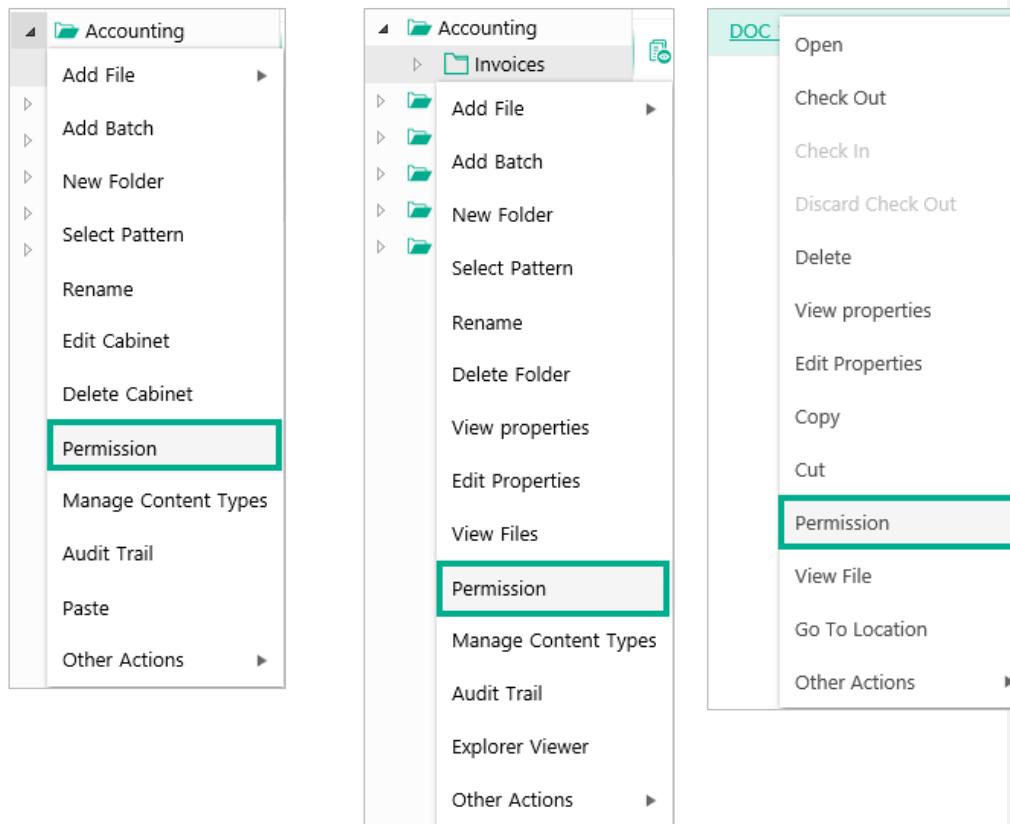


Figure: Permissions

By default, all libraries, folders, files in a site collection inherit permissions settings from their parent in the hierarchy, however the system allows exceptions to break the inheritance on apply permission specific to a folder or a document.



1.12 Audit Trail

Audit trail is the complete history or log of any activity being performed in the system on a cabinet, folder or document inside Intalio Document. These activities can be upon creation, modification, copying, moving, deletion and so forth, and our solution allows users to view, enable and disable of the auditing activity.

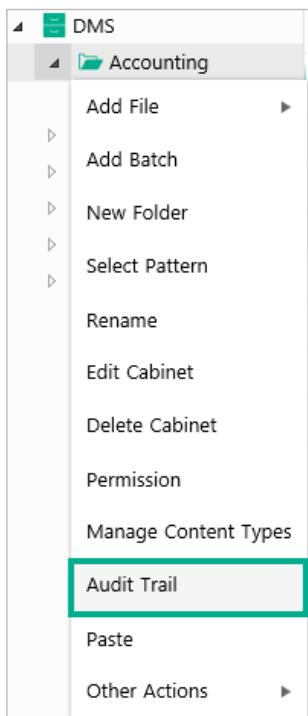


Figure: Audit Trail

Users can:

Turn it off: no auditing will be performed, regardless of whether or not AUDIT commands are issued.

Turn on The Full Audit Trail

Turn on Selective Audit: Select Audit Event (Each event will be explained in the table below Audit Trail Events)



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Select Audit Event

<input type="checkbox"/> View	<input type="checkbox"/> Security Changes
<input type="checkbox"/> Delete	<input type="checkbox"/> Undeleting
<input type="checkbox"/> Check In	<input type="checkbox"/> Check Out
<input type="checkbox"/> Profile Change	<input type="checkbox"/> Schema Change
<input type="checkbox"/> Update	

Figure: Audit Trail Settings

Users can query for events occurring between particular dates by specifying a date range. The selected events will be tracked and shown in an overview.

Audit Trail - Pre-Sales				
Audit Trail	Configuration	User	Event	Occurred
<input type="button"/> Search	<input type="button"/> Reset	<input type="button"/> Close		
From :	28/11/2017			
To :	28/05/2018			
Users	Enter a name or email address...			
Event	All			
Object Type	All			
	<input type="checkbox"/> Include children items			

Figure: Audit Trail Search Results

This log will show you the user name, Event, Location ...

In case Include Children items checkbox is checked, audit trail will be applied on the children as well. For example: in case Audit trail is executed on a cabinet with children, the folders, subfolders and documents under this cabinet will be audited.



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1.13 Intalio Recognition

Intalio Recognition a multi-tasking tool allowing users to perform Optical Character Recognition (OCR) on images/documents, supporting English, French and Arabic languages. Any additional language can be added on clients' request.

The OCR allows users to edit the resulting text on the spot. On the other hand, super users are allowed to configure OCR results storage and display formats. Accordingly authorized users can edit those text files normally.

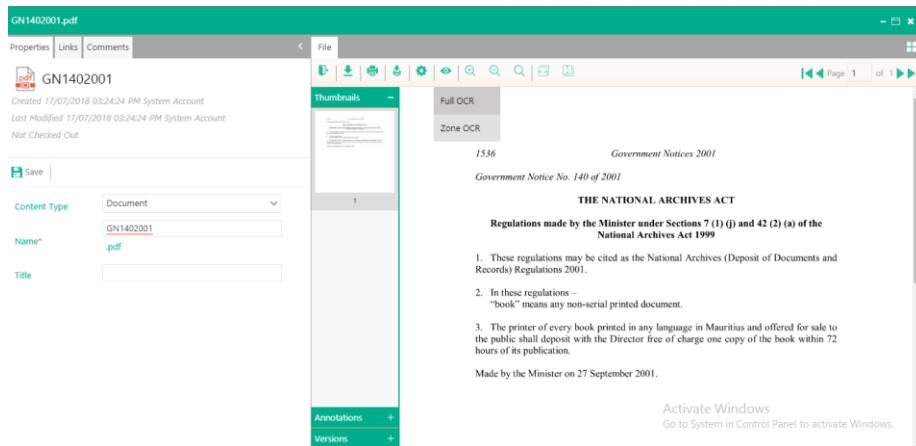


Figure: Optical Character Recognition

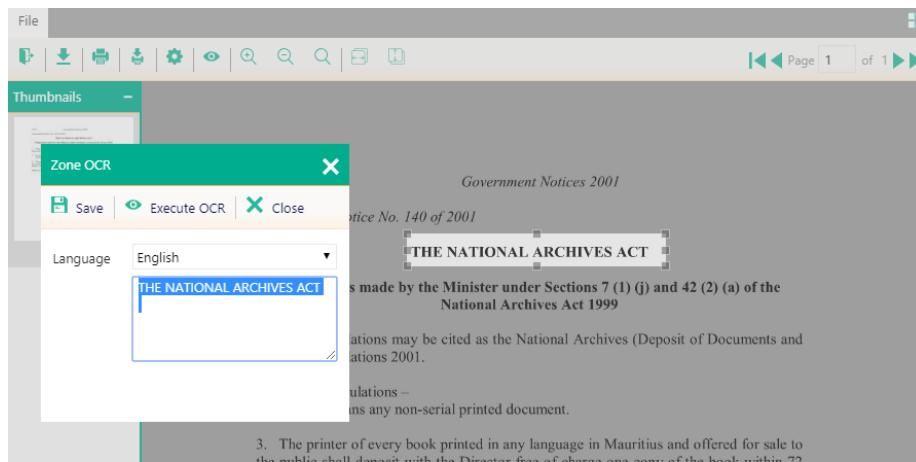


Figure: Zone OCR



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1.14 Intalio Viewer

All Intalio products are integrated with an advanced document and image viewer from Intalio, allowing any type of image or document to open, without having to install the native software on the client's machine. In addition, it provides basic and advanced capabilities to document / image enhancement, annotation, stamping, blackouts etc....

The screenshot shows the Intalio Document Viewer interface for a file named 'GN1402001.pdf'. The left sidebar contains properties like 'Content Type: Document', 'Name: GN1402001.pdf', and 'Title'. The main area displays the document content, which includes a title 'Government Notices 2001', a section 'THE NATIONAL ARCHIVES ACT', and regulations. A watermark 'Activate Windows' is visible at the bottom right.

Figure: Document Viewer

The screenshot shows the Intalio Document Viewer interface for the same file. A large red rectangular stamp with the word 'APPROVED' is overlaid on the document. The rest of the document content and sidebar are identical to the previous screenshot.

Figure: Watermarks



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The screenshot shows a software interface for document management. At the top is a toolbar with File, Edit, Signature, and Review buttons. Below the toolbar is a ribbon bar with icons for Save, Undo, Redo, Cut, Copy, Paste, and other document operations. The main area displays a document page with a handwritten signature over a redacted area. The redacted area has a black border and a dashed selection handle. A context menu is open over this redacted area, containing options: Manage Permission, Delete, Bring to Front, and Send to Back. The menu also includes a reference to '2) (a) of the'. Below the redacted area, the document text reads: 'Government Notice No. 140 of 2001' and 'THE NATIONAL ARCHIVE'. The text continues with regulations made by the Minister under S. 2) (a) of the National Archives Act, 2001. The regulations state:

1. These regulations may be cited as the National Archives (Deposit of Documents and Records) Regulations 2001.
2. In these regulations – "book" means any non-serial printed document.
3. The printer of every book printed in any language in Mauritius and offered for sale to the public shall deposit with the Director free of charge one copy of the book within 72

Figure: Blackouts

1.14.1 Thumbnail panel

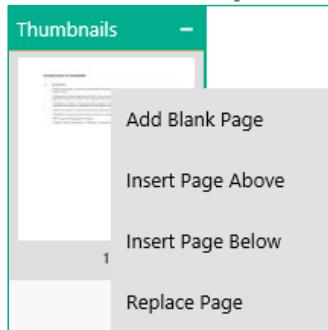


Figure: Thumbnail Panel

The thumbnail panel displays thumbnails of the pages in the document.

For PDF and TIFF files, a right click menu is available for each template. The menu contains the following actions:

Title	Description
Add Blank Page	Allows to add a blank page.



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Title	Description
Insert Page Above	Inserts a blank page above the chosen page.
Insert Page Below	Inserts a blank page below the selected page.
Replace Page	Allows to replace the selected page by a new one.

The user can also swap pages to change their order when needed.

1.14.2 Main Toolbar

The below is the main toolbar in Intalio Viewer allowing the user to perform the following actions:

- File
- Edit
- Signature
- Review.



Figure: Intalio Viewer Main Toolbar

• Document Display

The screenshot shows the Intalio Viewer interface. At the top, there's a navigation bar with tabs for File, Edit, Signature, and Review. Below the navigation bar, there are several icons for file operations like Save, Check In, Discard Check Out, and search. The main content area displays a document titled "INSTRUCTIONS TO TENDERERS". The document contains a numbered section 1. DEFINITION, which defines terms such as "Closing Date", "Invitation To Tender", "Performance Bond", "MANATEQ", "RFP", and "Tender". A sidebar on the left is titled "Thumbnails" and shows a list of document pages.



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Figure: Document Display in Intalio Viewer

1.14.3 File Toolbar

The file toolbar contains the file-related operations.



Figure 1: File Actions

Icon	Title	Description
	Save	Allows the user to save the actions performed
	Download	Download the document in a location selected by the user. There are 2 options for the download: Download. Download with Annotations.
	Print	Print the file with or without annotations. Print. Print with Annotations. Advanced Print.
	Audit	Shows the user the history log.



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	Do OCR	Allows the user to select the needed document zone to convert its content through the Optical Character Recognition technology. Note: the OCR services requires a separate license Intalio Recognition
		 Zone OCR Zone OCR Cancel Language English Arabic French Save as
	Zoom	Allows the user to zoom in, zoom out and return to the original size
	Fit Width, Fit Height	Adjusts the image to the width of the image window. Adjusts the image to the height of the image window.
Page 1 of 1	Swipe	Shows the user the previous and next pages.

In order to make changes, the user clicks on "Check Out" to lock it in order to forbid anyone else from performing changes on the current file.



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1.14.4 Edit Toolbar

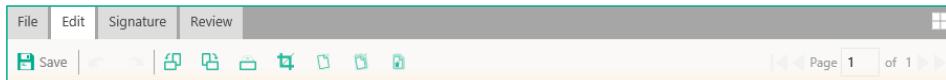


Figure: Edit Toolbar

Icon	Title	Description
	Save	Allows the user to save the updates
	Flip	Allows the user to flip the document
	Crop	Allows the user to select a region and crop the document accordingly.
	De-skew	Enables the user to de-skew a document
	Delete	Allows the user to delete multiple pages

1.14.5 Signature Toolbar

The signature toolbar allows the user to manage signatures within the document.

The toolbar is visible and accessible once Intalio Sign extension is installed.

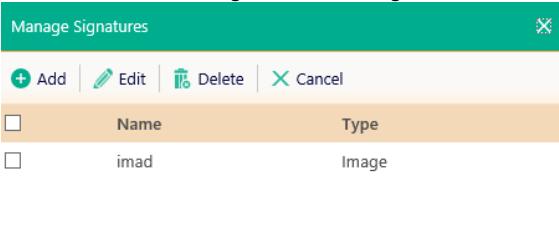
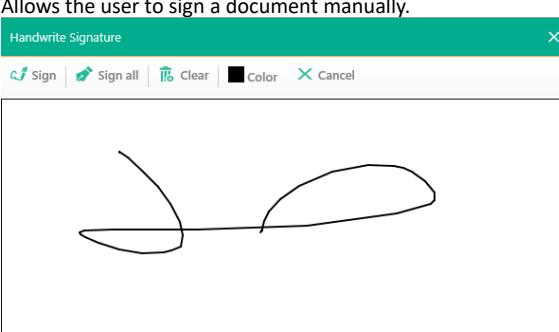
Note: the Signature services requires a separate license Intalio Sign



Icon	Title	Description
	Save	Allows the user to save the updates



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	Manage signatures	Enables the user to manage the available signatures 
	Topaz	Allows the user to select an area and submit his signature. The signature will appear in the selected area.
	Handwrite signature	Allows the user to sign a document manually. 
	Clear page signatures	Allows the user to clear all the signatures added to the page before being saved.
	Remove signature	Allows the user to remove the selected signature in the current page.
	Place saved signature	Allows the user to place a saved signature on a document



1.14.6 Review Toolbar



Figure: Review Toolbar

Icon	Title	Description
	Save	Allows the user to save the updates
	Draw a rectangle	Allows the user to draw a rectangle over a specific area to hide its content
	Draw an ellipse	Enables the user to add an ellipse on top of a certain document area to hide its content.
	Create a text annotation	Allows the user to create an add a text annotation to the document
	Highlight a text	Allows the user to highlight a certain region in a document
	Blackout	Allows the user to blackout a document zone
	Stamp	Enables the user to add a stamp to the content. Stamp values are: Approved, Confidential, Draft, Final Version, Reviewed and Revised.
	Create a barcode	Allows the user to create and assign a barcode to the content.
	Place a sticky note	Enables the user to add a sticky note to the document
	Draw a handwritten annotation	Allows the user to add a handwritten signature to the document.



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The screenshot shows a digital document interface. On the left, there's a sidebar titled 'Thumbnails' with a red circular annotation. The main area has a yellow 'sticky note' with the text 'sticky note'. Below it, under 'INSTRUCTIONS TO TENDERERS', is a numbered list. The first item is 'DEFINITIONS' with a yellow arrow annotation pointing to the text. To the right of the list are several buttons: 'Manage Permission' (with a red border), 'Delete' (disabled), 'Add to all pages', 'Bring to Front', 'Send to Back', and 'CONFIDENTIAL' (highlighted with a red box). At the bottom of the list, there are more definitions with small annotations: 'Closing Date', 'Invitation To Tender', 'Performance Bond', 'MANATEQ', 'RFP', and 'Tender'.

Figure: Reviewed Document Sample

Title	Description
Manage Permissions	Allows the user to manage the permission on the annotation. This permission can be given to everyone or to specific users or groups. Security type: Inclusive: the users specified in the Permission section will see the annotation. Exclusive: the users specified in the Permission section will not see the annotation. Permission: Users with View permission will be able to view the annotation as an annotation and they will be able to print the image either with or without annotation. They will also be able to OCR the text hidden by the annotation. Users with Force permission will view the annotation as part of the image and they are forced to download and/or print the image with this annotation.
Delete	Allows the user to delete the annotations.



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Add to all pages	Allows the user to add the signature to all the pages.
Bring to Front	Allows the user to bring the annotation to the front of all the annotations.
Send to Back	Allows the user to send the annotation behind all the annotations.

- **Supported Document Formats**

Supported Document Formats	
Office Documents:	The ability to view Office Files
Microsoft Word (.doc, .docx)	
Microsoft Excel Worksheets (.xsl,.xlsx)	
Microsoft PowerPoint presentation (.ppt,.pptx)	
TIFF File	The ability to view .tif and .tiff files
JPG Images	The ability to view JPG files
JPEG Images	The ability to view JPEG files
GIF Images	The ability to view GIF files
CAD Images	The ability to view CAD files
BMP Images	The ability to view BMP files
PNG Images	The ability to view PNG files
PDF Documents	The ability to view PDF files



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1.15 Intalio Sign

The concept of a signature has been known for centuries as a means to establish the authenticity of documents. But as paper-based documents have been replaced by electronic assets such as messages, correspondences, and software solutions, digital versions of traditional signatures have emerged.

A digital signature is a digital code that can be attached to an electronically transmitted message that identifies the sender. Like a written signature, the purpose of a digital signature is to guarantee that the individual sending the message really is who he or she claims to be. However, to be fully effective, a digital signature must be unforgeable; noting that there are different encryption techniques that can guarantee this level of security.

What is Intalio Sign?

Intalio Sign is a solution offered by Intalio that requires any Intalio Core Solution to be installed (Intalio Document, Intalio Correspondence, Intalio Case, etc.). It provides digital signature capabilities to various types of documents stored and managed by Intalio Repository.

Intalio Sign is based on the Intalio Platform, and uses a set of Library Solutions containing the core functionalities of the digital signature, such as: sign, create certificate, upload signature, database connection, etc.

In Intalio Sign, digital certificates are created using Intalio core library and Active directory as a certificate authority, which creates the keys of a certificate. A digital certificate is a Personal Information Exchange File (pfx) that contains both private and public keys, certificates, certificate chains, and root authority certificates. Its content is protected by a password. A digital certificate utilizes a digital signature to bind together a public key with an identity (example: the name of an organization). In other words, the certificate is used to confirm that the public key belongs to a specific organization. For security measures, certificates state: Signed by (Name) and the signature date.

Intalio Sign also provides a Pin (Personal Identification Number: a set of automatically generated numbers used to authenticate a user to a system) for each used signature; in case the computer becomes compromised, this Pin will add an extra layer of security that prevents an attacker from gaining access to a certain signature and using it to sign documents on the user's behalf.

Intalio Sign validates the authenticity and integrity of a message, software, or digital document by converting the concept of traditional paper-based signing into a coded message. It is noteworthy that any change performed on a document after it has been signed invalidates the signature, thereby protecting individuals from signature forgery and information tampering.

A digital signature is also very effective in legally binding documents, since it is difficult to imitate and can be time-stamped. In fact, a digital signature is more of a process than just affixing a signature. For example, when a document is digitally signed, the software scans the document and creates a calculation to represent it, making this calculation a part of the digital signature. When the recipient authenticates the signature, the sender's and the receiver's calculations are then compared. Only if the results match, then the signature is valid.



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It provides the following benefits:

- **Speed:** Businesses no longer have to wait for paper documents to be printed and delivered by hand. In fact, contracts will be easily written, completed, and signed by all concerned individuals in a short period of time no matter how geographically far they are.
- **Costs:** Paper documents delivery is much more expensive than using digital signatures on electronic documents; therefore, businesses will significantly cut down on costs.
- **Security:** The use of digital signatures and electronic documents will reduce the risks of documents being read, destroyed, or altered while in delivery.
- **Tracking:** A digitally signed document can be easily tracked and located within seconds.
- **Non-Repudiation:** Digitally signing an electronic document identifies the user as the signatory, which cannot be denied later. In addition, no one can forge your digital signature or falsely submit an electronic document claiming it was signed by you.
- **Time-Stamp:** By time-stamping a digital signature, the signer will clearly know when the document was signed.
- **Tamper-proof documents:** Users have to download a non-signed version of the document to work on.
- **Immediate ROI:** Businesses will get an immediate value and Return On Investment within a year.
- **Compliance:** Intalio Sign meets compliance requirements with local regulations.



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1.15.1 Automatic Signature

Automatic Signature allows users to:

Configure signatures by simply adding the URL of an existing template and browsing for a new signature template.

Customize the template's security authorization by allowing its content to be "read only".

Edit the signature's template by opening it in Intalio Viewer so that the signature's placement can be set by a simple drag and drop action, and its permissions managed by adding one or more user to the same signature place.

Duplicate the signature's placement on the level of all the pages or on specific selected pages.

The screenshot shows a split-screen view of an 'Employment Application Form'. On the left, the full form is visible across four pages (1, 2, 3, 4). On the right, a modal window titled 'Automatic Signature' is displayed. It contains a placeholder box for a signature and a 'Save' button at the top. Below the box, there are fields for 'Signature', 'Page', 'Place', and 'Operation'. A note at the bottom of the modal says 'Please drag and drop the empty box below to the desired place on the center region'.

Figure: Document Signatures



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1.15.2 Integration with Intalio Viewer

Intalio Sign is natively integrated with all Intalio platforms including Intalio Viewer, which offers image quality enhancements and allows users to easily add their legally binding signature using a simple drag and drop.

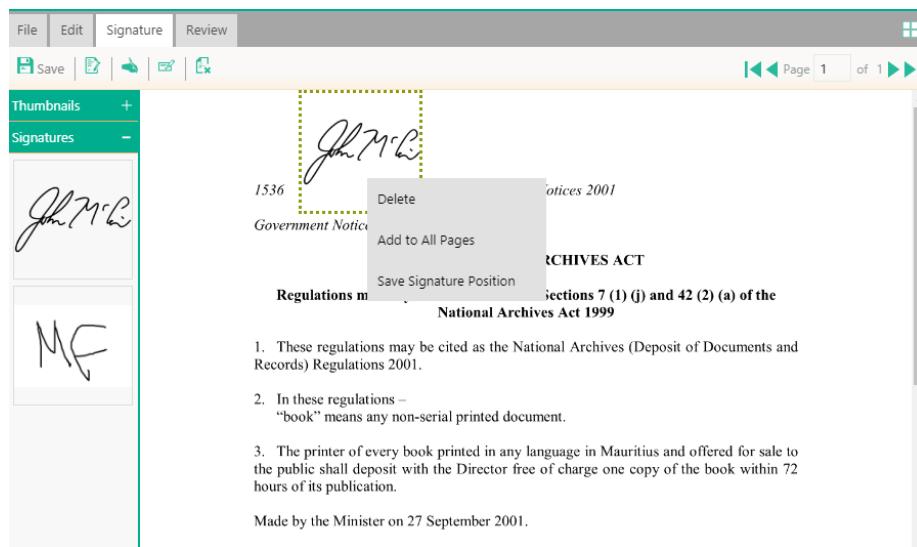


Figure: Intalio Sign