Techsavanna

PROPOSAL FOR DOCUMENT MANAGEMENT SYSTEM FOR COUNTY GOVERNMENT OF MERU

Prepared by Jacob Shaviya

Version 1.0

Date 03.06.2017

VERSION & APPROVALS

VERSION HISTORY			
Version #	**Date**	**Revised By**	**Reason for change**
1.0	**03-06-2017**		**New Product**

This document has been approved as the official Business Requirements Document for the project called **Document Management System for the County Government of Meru** and accurately reflects the current understanding of business requirements. Following approval of this document, requirement changes will be governed by the project's change management process, including impact analysis, appropriate reviews and approvals.

KEYS:

DMS-Document Management System

CoGM-County Government of Meru

DOCUMENT APPROVALS			
Approver Name	**Project Role**	**Signature/Electronic Approval**	**Date**
Techsavanna Ltd	Project Developer		03.06.2017
CoGM	Client		

Project Overview and Background

The **DMS** is an end to end web/cloud application that manages all aspect of organizations document management needs from backup/archiving, referencing, searching, submissions, versioning, workflows automation, user management, communications/notifications and dashboard The DMS shall also incorporate a mailing system which will be responsible for managing communications off the DMS.

Project Dependencies

The systems extended functionality may include integration with other systems.

Project Deliverables

The system's deliverables are outlined in the table below. They are classified according to the amount of effort (D-Difficult, A-Average-Easy) and time (in days) required to complete each phase.

The classifications also decide the feature's criticality. This is divided as follows:

- **M**: a must-have feature, critical to the website/ product
- **O**: an optional feature; good value-add, but not critical at launch
- **N**: a nice to have feature; bells and whistles

Effort

A measure/scale of the level of skill and attention to be given to the deliverable.
- **D**: Difficult
- **A**: Average
- **E**:Easy

FEATURE	Effort	Creative Design Time(Days)	Development Time(Days)	CLASSIFICATION [M, O, N]
User Management • **User logins and rights allocation**	E		Done	M
Document Search &Indexing • **Top-level search** • **Cabinet index search** • **Document index search** • **File name search** • **Full text search** • **Document type filter** • **Bookmark searches**	A		Done	M
Workflow • **Simple point and click user interface** • **To Do item searches** • **Ad hoc workflow** • **Fixed workflow** • **Workflow routing decisions** • **Detailed workflow reports**	E		Done	M/N
Security • **Detailed audit trail** • **Three-tiered administration** • **Field formatting enforcement** • **User/group/system security** • **Recycle bin deleting** • **Barcode reconciliation**	D		Done	D
Archiving & Scalability • **1 to 1000s of users** • **Store billions of documents** • **Unlimited filing cabinets**	E			
Document Management Functionality • **Barcodes** • **Burn to CD** • **Convert to PDF** • **Export to ZIP** • **Export only metadata**	A			M

• **Document versioning** • **Annotations** • **Optical Character Recognition** • **Content hiding with redaction** • **Multiple departments (databases)** • **User inbox and inbox reporting** • **Public inbox** • **Document delegation** • **Document publishing for external viewing** • **System use reports** • **PDF form processing**				
Usability / User Interface & Experience (UI/UX) • **Full screen mode** • **Thumbnail view** • **Up to 255 index fields** • **Store any file format** • **Flexible document storage design** • **Keyboard-driven indexing**	A			
Integrations • **Integration with third-party applications** • **ODBC integration** • **Active Directory/LDAP integration** • **Web Services API**	A		Partly Done	
Plug-Ins • **Outlook check-in** • **Word/Excel check-in/check-out** • **Print To** • **File Monitor/Hot Folder tool**	A		No Not Done	
<mark>**TOTAL (days)**</mark>				
GRAND TOTAL (days)		Avg. 30		

Stakeholders

The following comprises the internal and external stakeholders whose requirements are represented by this document.

	Stakeholder	Stake/ Requirements
1.	CoGM	Project client
2.	CoGM-Workers/Users	Users

Technical Specifications

	Specification	Description
1.	User Interface	HTML 4/5,CSS3,PNG JPEG Graphics
2.	Back end Database	MySQL (option of any other)
3.	Programming Language	PHP5,SQL
4.	Supported Media	All documents (doc, pdf, jpeg, png, iml, htm, html,) for all extensions, video files for all extensions i.e.(avi, mp4, flv, xvid, etc.), Audio files for all extensions (mp3, mp2, wma,),
5.	Platforms(Operating System)	Multi-Platform
6.	Programming Framework	Symphony 1.4.x (Proposed by Techsavanna being a stable development framework and existing modules are based on the latter, database independence, developer independent)
7.	Infrastructure/web host(Optional)	Test Server, dedicated VPN from Safaricom Business, Standard Ubuntu/Centos Linux Server. Zend Server Community Edition Production Server: Techsavanna VPN, Linux environment
8.	Client machines	Standard Desktop machines: in Intel core i3 ,4gb RAM, OCR, Printers & Scanners (Can be supplied to CoGM)

APPENDIX

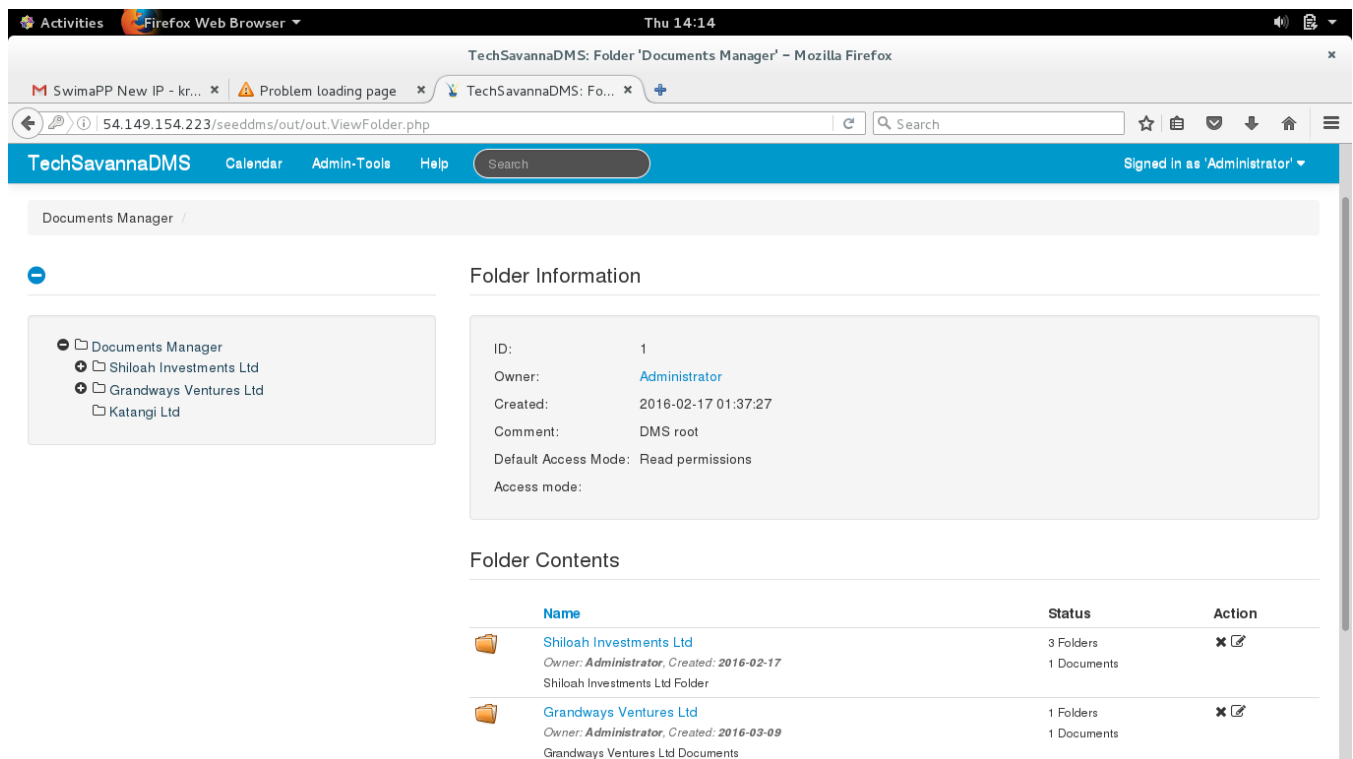## Document Management System-Sample Screens
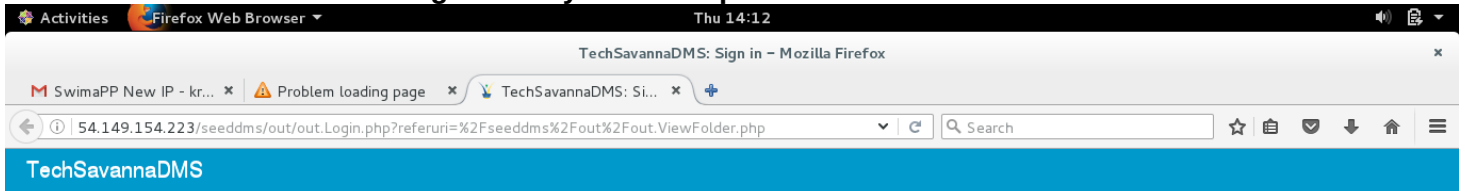
TechSavannaDMS: Folder 'Shiloah Investments Ltd' – Mozilla Firefox

M SwimaPP New IP - kr...   ✕   ⚠ Problem loading page   ✕   TechSavannaDMS: Fo...   ✕   ✚

54.149.154.223/seeddms/out/out.ViewFolder.php?folderid=2   Search

TechSavannaDMS   Calendar   Admin-Tools   Help   [Search]   Signed in as 'Administrator' ▾

⊖

- ⊖ 🗀 Documents Manager
  - ⊕ 🗀 **Shiloah Investments Ltd**
  - ⊕ 🗀 Grandways Ventures Ltd
    - 🗀 Katangi Ltd

Folder Information

ID:	2
Owner:	Administrator
Created:	2016-02-17 01:55:44
Comment:	Shiloah Investments Ltd Folder
Access mode:	inherited

Folder Contents

Name	Status	Action
🗀 Payroll 2017 May *Owner: **Administrator**, Created: **2017-06-03*** Payroll 2017	0 Folders 0 Documents	✕ ✎
🗀 Manual Uploads 2017 May *Owner: **Administrator**, Created: **2017-06-03*** Manual Uploads 2017 May	0 Folders 0 Documents	✕ ✎
🗀 Invoices 2017 May *Owner: **Administrator**, Created: **2017-06-03*** Invoices 2017 May	0 Folders 2 Documents	✕ ✎

TechSavannaDMS: Folder 'Shiloah Investments Ltd' – Mozilla Firefox

M SwimaPP New IP - kr...   ✕   ⚠ Problem loading page   ✕   TechSavannaDMS: Fo...   ✕   ✚

54.149.154.223/seeddms/out/out.FolderAccess.php?folderid=2&showtree=1   Search

TechSavannaDMS   Calendar   Admin-Tools   Help   [Search]   Signed in as 'Administrator' ▾

Folder   Add subfolder   Add document   Edit folder   Move Folder   Remove folder   Edit access   Edit notification list

Documents Manager / Shiloah Investments Ltd /

Edit access

Set Owner

[admin - Administrator ▾]   [💾 Save]

Access Inheritance

Access is being inherited.

[Copy inherited access list]

[Start with empty access list]

TechSavanna-DMS

TechSavannaDMS: Admin-Tools – Mozilla Firefox

M SwimaPP New IP - kr... ✕ | ⚠ Problem loading page ✕ | ↳ TechSavannaDMS: Ad... ✕ | ✚

54.149.154.223/seeddms/out/out.AdminTools.php | Search

TechSavannaDMS   Calendar   Admin-Tools   Help   [Search]   Signed in as 'Administrator' ▾

Admin-Tools   Users/Groups management ▾   Definitions ▾   Backup/Logging ▾   Misc ▾

Users management	Groups management	
Backup tools	Log files management	
Global keywords	Categories	Attributes
Contents overview	Charts	Folder/Document check	Timeline
Settings	Manage extensions	Version Information

54.149.154.223/seeddms/out/out.LogManagement.php

TechSavannaDMS: Timeline – Mozilla Firefox

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54.149.154.223/seeddms/out/out.Timeline.php | Search

TechSavannaDMS   Calendar   Admin-Tools   Help   [Search]   Signed in as 'Administrator' ▾

Timeline   Timeline

Date

2017-05-01 📅 -

2017-06-29 📅

TechSavannaDMS: Contents overview – Mozilla Firefox

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54.149.154.223/seeddms/out/out.Charts.php?type=docspermonth | Search

TechSavannaDMS   Calendar   Admin-Tools   Help   [Search]   Signed in as 'Administrator' ▾

Admin-Tools   Users/Groups management ▾   Definitions ▾   Backup/Logging ▾   Misc ▾

Select chart   New documents per month

Documents per user
Diskspace per user
Documents per mime-type
Documents per category
Documents per status
New documents per month
Number of documents

54.149.154.223/seeddms/out/out.Charts.php?type=docspermimetype

TechSavannaDMS: Contents overview – Mozilla Firefox ✕

M SwimaPP New IP - kr... ✕   ⚠ Problem loading page ✕   🦊 TechSavannaDMS: C... ✕ ✚

54.149.154.223/seeddms/out/out.Charts.php?type=docspermimetype   C   🔍 Search

TechSavannaDMS   Calendar   Admin-Tools   Help   Search   Signed in as 'Administrator' ▾

Admin-Tools   Users/Groups management ▾   Definitions ▾   Backup/Logging ▾   Misc ▾

Select chart

Documents per user
Diskspace per user
Documents per mime-type
Documents per category
Documents per status
New documents per month
Number of documents

Documents per mime-type

text/plain
1 (25%)

application/pdf
3 (75%)

Legend
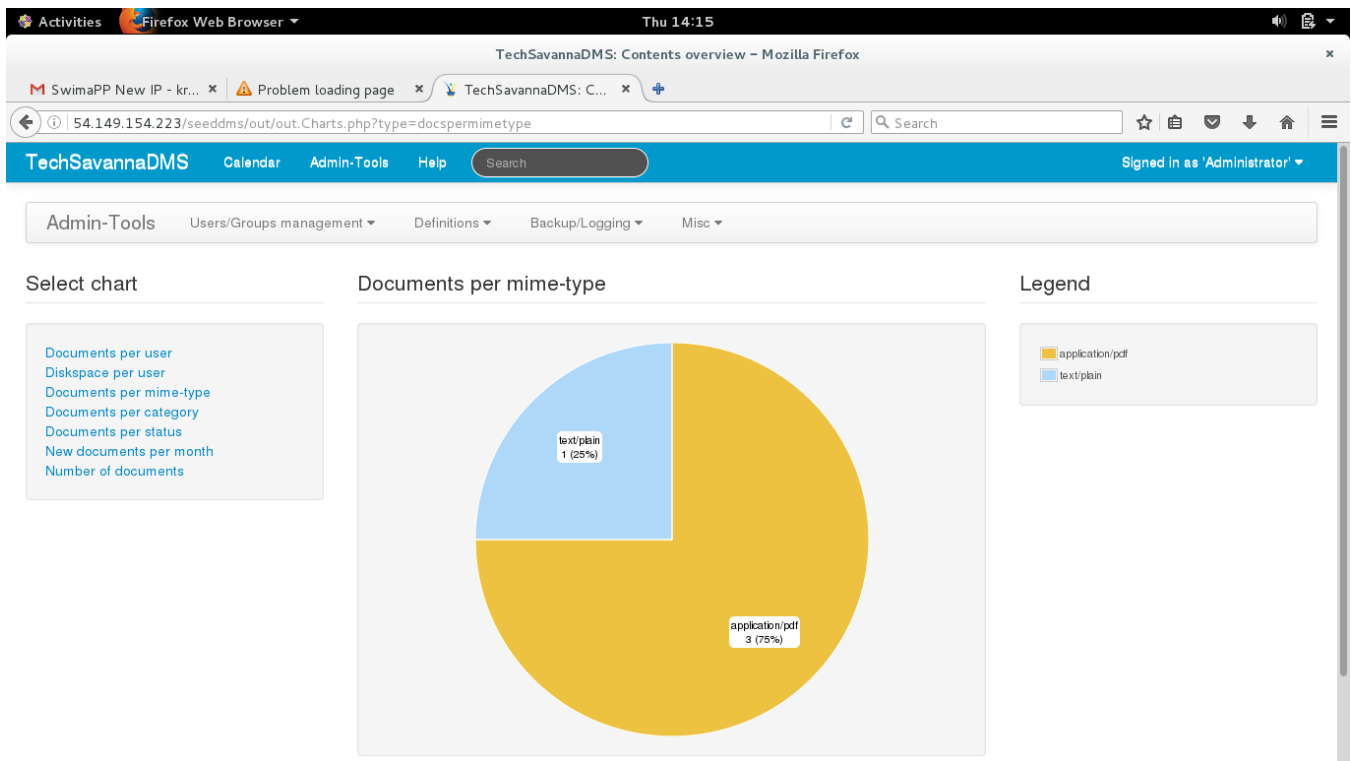
application/pdf
text/plain

TechSavannaDMS: Document 'Loan Application Form' – Mozilla Firefox ✕

M SwimaPP New IP - kr... ✕   ⚠ Problem loading page ✕   🦊 TechSavannaDMS: D... ✕ ✚

54.149.154.223/seeddms/out/out.ViewDocument.php?documentid=1&showtree=1   C   🔍 Search

TechSavannaDMS   Calendar   Admin-Tools   Help   Search   Signed in as 'Administrator' ▾

Document   Update document   Lock   Edit document   Move document   Expires   Remove document   Edit Access   Edit notification list

Documents Manager / Shiloah Investments Ltd / Loan Application Form

Document Information

ID:	1
Name:	Loan Application Form
Owner:	Administrator
Access mode:	inherited
Used disk space:	1.17 KiB
Created:	2016-02-17 02:18:55
Keywords:	fred kairu,loan application
Categories:	loan applications

Current version   Reviewers/Approvers   Attachments   Related Documents

File	Comment	Status	
loan application.txt Version: 1 1.17 KiB, text/plain Uploaded by Administrator 2016-02-17 02:18:55		Draft - pending review Does not expire	⊕ Download ★ View online ✎ Set reviewer/approver 💬 Edit comment ✎ Edit attributes

Status

Date	Status	User	Comment
2016-02-17 05:18:55	Draft - pending review	Administrator	New document content submitted