Dockria DBS

SYSTEM TECNOLOGY

1. PDF SDK FUNCTIONALITY AND OPTION

RAD PDF SDK

1) Usage of https://www,radpdf,com/demo/lite

2) Enable or Disable any or all functionality available in SDK to End user based on permission.

RAD PDF

1) Enable or Disable any or all functionality available in SDK to End user based on permission.

2) Client-side feature for PDF manipulation.
   a) All Features available should be present and used in one system.

3) Admin side permission-based feature Settings.
   a) Enable or disable any feature available by SDK. Company Admin should have these options as a checkbox selection when creating permission.

Mobile Responsive

1. Available Feature to mobile user

1) Sign PDF Document.
   a) PDF mark-up ability that will not break the experience and put stress on mobile browser.

2) Upload New Document from.
   a) Select Document Type.
      i) Add information to the metadata and container type.
         (1) Add PDF mark-up if allowed or required.

(2) Save Document to the System.

3) Search for Documents.
   a) Complete Workflow Task.
      i) Folder View allowed to the user.
      ii) Assign already available document to external user.

System Architecture

1. Multi-Tenant

1) Core Source Code.
   a) Create Multiple Companies.
      i) Each company have its own Database for compliance.
      ii) Each Company to access their environment.
         (1) www.companyname.com
            (a) This is our company.
         (2) app.companyname.com/client name.
            (a) this will be client Installation or access.
         (3) app.companyname.com
            (a) This is core application.

2. **System Architecture is our idea, we do know that it might now be viable in some cases and might be good to try different methodology. Your advice is appreciated.**

Master Admin

1) Domain System Login Only.

   a) Suggestion Simple and secure login creation and management for domino system admins. This is most crucial part for the system.

   b) Login to master admin.
      i) Create a New Company.
         (1) New Company Registration.
            (a) External Signature request per month per company.
               (i) Assign System Usage Time Limit for the company.
                  1. Create Company Environment.

(2) Designate an email to reactive invoices from our company.
   (a) Company Information in Detail:
      (i) Company Incorporate Certificate Upload.
      (ii) Company PIN Certificate Upload.
      (iii) Fields will begiven later that will used to store company's.
         1. Official Information.
            a. Designate an email to receive login information from the system for all user and admin of the company.

Company Admin

Login

a) Forget Password
   i) Submit Your Email Address
      (1) Answer Security Question
         (a) Wrong Answer
            (i) Submit A ticket request from the original email to master admin for Account Security Reset
         (b) Right Answer- Change and confirm New Password

b) Username and password
   i) Register the Browser + IP address + Username for Check
      (1) If New Device: Ask Security Question and Answer
      (2) If old Device used the proceed to login

Admin Dashboard

Login Successful

1) Every Successful Login and Unsuccessful Login
   a) Send email to Email Address and save the log in the system to specified email address in Company registration Step to login to the account
      i) Send Information: username, time, Date, location based on IP, Public IP address, Browser name and version

Create Metadata Type

1) Type unique metadata Name
   a) Select datatype
      i) Text number/Large Number Currency yes/no Dare/Time Rice Text Attachment - any document on front end that can be downloaded hyperlink memo

      ii) Data type: Text then option for Auto Filename available
         (1) Select check box auto filename
            (a) A text box appears
               (i) Under the text box, the command button opens created metadata property.
                  1. Ability to select 1 or many metadata system property into the textbox
                     a. Ability to add free text to the textbox
         (2) User can select any datatype for the metadata and then save

Create Container Type

*Container type only holds information like a DB table- No Documents
* It only have 1 primary Key

*Container type can be imported as metadata to Document Type
* Always required

1) Up to 50 metadata records can be create in a container type.

2) Add a unique name to the container type
   a) Add and remove any metadata in the container type
   b) import Data into container Import DB table/ CSV File / Excel File/ Link to Database Online
   c) Create New Metadata
      i) Ability to Enable or Disable Blank /not blank for value.

PDT Creation- PDF Document Template

Are used for Non- Document Workflow. This means these documents are available from the system.

1) Upload a PDF Form From machine - Form Should be empty without Form Data
   a) Give unique Name
      i) Select the Document Type available from the System – mandatory
         (1) Select a workflow – optional
            (a) Save PDF - Cannot add elements to a PDF Form that was created outside the system
               (i) Cannot edit PDF Forms created outside our system. It has to be done outside the system and upload back - option to update PDF Form.

2) Create New Pdf Form
   a) Give Unique Name
      i) Select Document Type available from the system- mandatory
         (1) The Document type selected here cannot be used again. 1PDT will belong to 1 Document Type.
         (2) Select a Workflow – optional
            (a) Once Document type Selected, show Plain PDF with RADPDF Editor and all the editing options.
               (i) Edit PDT elements or Add more later on
               (ii) Add Elements available By Rad PDF to the plain PDF
                  1. Save PDF

Create Document Type

Document Types can hold 1 document or many dedault Value: Name: Date: File Name (cannot be removed)

1) Add Auto File Name Metadata for the Doc. Type that was created in +
   a) Create a New Metadata type
      i) New Metadata
2) Enable /Disable Document Versioning
3) Enable /Disable Document OCR
4) Add user/user group as allowed access
   a) If user/user group added, it becomes only available to them for view and usage and search on UI level.
   b) If no user/ user group Added,it is available for everyone on UI
5) Ability to Enable or disable blank for value
6) Import - Metadata type that were created in the system

   a) Button that shows all metadata created in the system
      i) Only 20 metadata per Doc type allwed
7) Add or remove any metadata in the doc. Type
   a) Option to create new Metadata in the same screen and import the same upon saving
      i) Give it unique Name

Create Folder Structure

1) Give Folder Structure A Unique Name
   a) For all user
      i) Select Document type OR container type as folder
         (1) can add up to 5 level of sub folders that are indented & nested under this.
            (a) Document will be available as list and thumbnail format under the last sub older

2) For specific User/users/user Group
   a) Select Document Type or Container Type as folder
      i) Can add up to 5 level of sub folders that are indented & nested under this
         (1) Document will be available as list and thumbnail format under the last sub folder.

Create Permission Groups

1) System Default Permission Group will always be available that will give access to work with the system
2) Give it a Name and Assign Permission on what can user do in the system.
   a) New permission group cannot be saved with default values.
3) Permission will consist of action a user can do in the system, document operations they can perform, and PDF features They can use in the system. System should also incorporate the same permission on right clicks in the system.

Create User Groups

1) System default group should be present all user in this group with all access
2) Assign permission to what a group can do in the system E.G. Department
3) Assign a permission group that is Available

Create User

1) Email Address important
   a) Users are create OR imported from an Excel/CSV sheet. System at this stage will not inform users about their login.
      i) USER CREATED EMAIL BUTTON- by clicking this button, system will send out emails to all the new users imported or created their security question+ answer and password
2) Assign Permission to what a user can do in the system
   a) User created always has limited permission to work with the system. Read, Write, Upload, Download, Print
3) Assign a permission group that is available
   a) User created always belongs to the system default group

Company White labelling options

a) Add logo for the company PNG, no BG, Color and white variant.
b) select system Colors 1 primary color 2 secondary color give color wheel and hex code input option.

LIST OF FEATURES TO ENABLE OR DISABLE & TO BE AVAILABLE FOR UI AND ADMIN - FEATURES LIST COMPLETE

1. Right Click in the Application.
2. Right Click to have traditional Options. System options should be accessible with right click. Features not enabled will not be displayed in the UI righclick.
3. Copy
4. Move
5. Delete
6. Update Filename Manually
7. Private Document - Ability to make a Doc Private
8. Download the PDF
9. Print PDF
10. Quick View PDF
11. View Metadata
12. Edit Metadata
13. View the Document Version.
14. Rool back to the previous version of the Document.
15. Share 1 or many Documents Internal
    When sharing internally, receiving user can View Only the document latest version auto updating if changes.
16. Share 1 or many Documents External - Link only. View only. Latest Version auto updating of changes.
17. Send 1 Document for External Signature. This can be done 1 document at a time only. Each request sent out should ask for a valid email address, Name of the Person, Subject of the email, message on the email, timeframe the person needs to sign it before, after the time expiration document should not be available for the external user, email goes with the link to the document for external signature different and simple UI with only signature, print, and download PDF option.
18. Edit PDF - This will have the PDF edit SDK features. What can be done and what cannot be.
19. Add available metadata to a single document.
20. View Document History - This contains all the changes, edits, and clicks done on the document.
21. Add 1 document
22. Add multiple documents
23. start a new workflow
24. Assign a document to an internal user - Should have options to select the timeframe for completion and message. Email should go out with a document link that takes the user to the webapp.
25. Set PDF Upload maximum size.
26. OCR per document ability. - admin - Set Doc OCR on or off. Open Source or from RAD PDF
27. search with OCR ability. - front end
28. HotFolder upload ability.
29. External Signature Requests - Admin to have the ability to set a number of limit per month all users can send external signature approvals. EG. Limit for the company users is 15 external signatures, this means each user gets 15 requests a month and it is reset at every month and no carry forward. If the 15 signatures request is exhausted, then the feature is blocked with a message.
30. Per Workflow History to know where the document is and where it will go next. Feature for front end users.
31. Error handling - should be done in more legible way where users can copy paste the error OR know what they are doing wrong.
32. Restrictions Handling Message - This should be clear on why the user is not able to do certail task they want to.
33. Complete System wide Audit LOG
34. Extract information from search results - Users should be able to extract complete information without document from the front end if the permission allows. In CSV or Excel format.

****Features that cannot be changed or removed.**

1. PDF Compression - Each and every document saved in the system needs to be compressed.
2. PDF Encryption - All PDF storage needs to be encrypted.
3. Document URL Encryption - Complete - When the link of the document is shared with external user, the link should be completely encrypted and always displaying latest version. When reloaded, it should show the current version.

Create Workflow

1) Create New workflow duplicate delete draft/test as options

    a) Escalation & Monitors Assign user/ user group / some user as workflow monitors and overseers

        i) Option to send separate notification on each level of workflow task completion

(1) Email subject: Select any metadata in the system to create subject with typed text.

(a) Email body: select any metadata in the system to create email message

(i) Email sent out after a user has completed a task in the system.

b) Option to send an escalation email notification of task not completed in time by assigned user

i) Email subject: Select one or more available metadata from doc. Type selected when creating new workflow

(1) Email body: Select one or more available metadata fro the doc. Type selected when creating new workflow and add appropriate email message text.

(a) Email sent in immediately after a user has failed to complete a task.

c) Select document type from drop down one doc. Type can be selected - Necessary

i) Cannot be saved without this step

d) Select if PDF needs to be upload for the workflow to start Yes and No.

i) So, if No, then user can use it as an information gathering tool.

e) Create New Task admin can add 50 tasks in 1 workflow

i) Assigned to:

(1) user

(2) user group

(3) Some User only

(4) User who started the workflow, initiator

(5) Previous task user

(a) Select option

2) Create Subject: select any metadata value related to the document - type the workflow belongs to and user information from the system

a) Create TIN (task Information Notification)

i) Give a unique name, each task to be unique, numbered in the system. Not task number should be repeated regardless of not being in one workflow. Unique and continued. If deleted, that number will not be used again.

(1) Create TDB (Task Decision Buttons) can only create 4 per task. These are the buttons which will determine where the document will go next in the workflow.

(a) If a TDB is not create system should take the task as last step in the workflow and end it automatically.

(b) Give TDB a Name

(i) Select the task/workflow it should go to when clicked by user in UI. Can only select either current workflow task or Different Workflow. 1 selection only

b) Create Message: Body Select any metadata value related to the document - type of the workflow and user information

i) Select if the document link to the system should go with the email notification, YES/NO

(1) Select Deadline for the task in Days, Business Days, Hours, Weeks, working weeks. Can select only 1 option. Selection Should be a part of the email Body information.

User Login Screen

1) User Login

a) Correct Username and password - It will always be their email address as username - password would have been set by the user.

i) Forgot password

EVERY SUCCESSFUL LOGIN AND UNSUCCESSFUL LOGIN

Send Information: UserName, Time, Date, Location based on IP, Public IP Address, Browser Name and version - On email to user and log it in the system.

ii) Answer Security Question

(1) Answer Wrong - Send company admin an email for password reset. Manual and outside of the system.

(2) Input your email address to receive a password reset link.

(a) Email with Pass reset link to be clicked
  (i) Answer the security question
    1. Answer right, option to setup new password with confirmation.
    2. Answer wrong - send company admin an email for password reset. Manual and outside of the system.
      a. Do nothing

Dashboard

1) Based on permissions display dashboard.

2) Working on multiple tabs, user can Ctrl + click on any link or function in the app to open it in a new tab. Allowing them to work on many different tasks and documents.

3) Hot Folder Upload
   a) Advise a way we can achieve this.
      i) All files dropped in this folder will be automatically saved to the DMS under a Folder view - To Be Indexed - This setting cannot be changed in this version.

4) Upload Multiple file - limit of 20 per upload. Per PDF or any document size limitation applied by the admin.
   a) 2 options to Upload Multiple files
      1. Drag and drop anywhere in the webapp - Max 20 files
      2. Click on the upload button and select files from your machine with help or ctrl/ shift Button
      i) Document indexing will go in a sequential order and 1 at a time
         (1) Document and empty metadata card view shown. Document view on the left and metadata view on the right.
            (a) Step 1 - select Document Type
              (i) Step 2 - Based on step 1 display related metadata and container information available for user to fill in.
                1. Step 3 - Put a comment in the metadata card. If allowed by the admin for the document type and optional operation.
                  a. Step 4 - Save or Cancel operation
                    i. Move to next document in the upload list.

ii. Repeat the steps.

ii) Upload any if the filetypes on your right - system will convert the document to PDF while preserving the original format and display the PDF document only to the user. Client Side

.ai - Adobe Illustrator file
.bmp - Bitmap image
.gif - GIF image
.ico - Icon file
.jpeg or .jpg - JPEG image
.png - PNG image
.ps - PostScript file
.psd - PSD image
.svg - Scalable Vector Graphics file
.tif or .tiff - TIFF image
.webp - WebP image.
.key - Keynote presentation
.odp - OpenOffice Impress presentation file
.pps - PowerPoint slide show
.ppt - PowerPoint presentation
.pptx - PowerPoint Open XML presentation
.ods - OpenOffice Calc spreadsheet file
.xls - Microsoft Excel file
.xlsm - Microsoft Excel file with macros
.xlsx - Microsoft Excel Open XML spreadsheet file
.doc and .docx - Microsoft Word file
.odt - OpenOffice Writer document file
.pdf - PDF file
.rtf - Rich Text Format
.tex - A LaTeX document file
.txt - Plain text file
.wpd - WordPerfect document

Create Document

1) Cannot edit PDF created by admin
2) Select an Available PDT based on permission
3) This option brings forward all the PDF document templates that were created by admin. User can search and select a particular PDT to create a new document out of it

Upload Single file

1) 2 options to upload single file
    1. Drag and Drop anywhere in the Webapp
    2. Click upload button - select a file from your machine.

    a) Document and empty metadata card on the left and metadata view on the right
        i) Step 1 - Select Document type
            (1) Upload a PDF file OR
                (a) Upload any of the below filetypes - System will convert the document to Pdf while preserving the original format and display the PDF document only to the user. Client side
        ii) Step 2 Based on step 1 display related metadata and container information available for user to fill in
            (1) Step 3 Put a comment in the metadata card. If allowed by the admin for the document type and optional operation.
                (a) Step 4 Save or Cancel operation.

.ai - Adobe Illustrator file
.bmp - Bitmap image
.gif - GIF image
.ico - Icon file
.jpeg or .jpg - JPEG image
.png - PNG image
.ps - PostScript file
.psd - PSD image
.svg - Scalable Vector Graphics file
.tif or .tiff - TIFF image
.webp - WebP image.
.key - Keynote presentation
.odp - OpenOffice Impress presentation file
.pps - PowerPoint slide show
.ppt - PowerPoint presentation
.pptx - PowerPoint Open XML presentation
.ods - OpenOffice Calc spreadsheet file
.xls - Microsoft Excel file
.xlsm - Microsoft Excel file with macros
.xlsx - Microsoft Excel Open XML spreadsheet file
.doc and .docx - Microsoft Word file
.odt - OpenOffice Writer document file
.pdf - PDF file
.rtf - Rich Text Format
.tex - A LaTeX document file
.txt - Plain text file
.wpd - WordPerfect document

Metadata Operations

1) Ability to extract search results to excel / csv. Not document only metadata, document type, container type information with comments.

Document Operations

1) This will be dependant of the admin and the rights that were given to the user by the admin.
   a) Should allow PDF operation that are allowed by the admin to a user.

Work flow or task view

1) View all the documents assigned to the user - select 1 type of view, can be changed later
   a) List view
   b) Calendar view
   c) thumbnail view
   d) Click on any document from the view
      i) See the assigned task in the metadata card
         (1) See document
            (a) PDF options shown as per permission
               (i) Complete task by Selecting any available task decision button.
                  1. Based on the task and conditions, send the document to another user.
                     a. Remove task from the list of the user's view

Document View

1) A view / window to view the document and related metadata and information.
   a) Same as double clicking a document in the system.

Logout Button

1) System should logout users from the system after 20-minute of inactivity.
2) When the browser/tab is closed, users should be logged out and connection terminated.
3) If even one tab is open in the browser of the system, user will be logged in for 20 min, and then auto logged out.

Advance Search Should be a small button near the search button. Opens a new dialogue Box.

1) 3 columns
   a) Column 1. Select metadata type /select Container Type / Document Type
   b) Column 2 Based previous step, select data type available

c) Column 3 Based on the previous step, either display a text box to write or block typing of text or give Boolean option to select from.

2) Search button at the end of the dialogue box