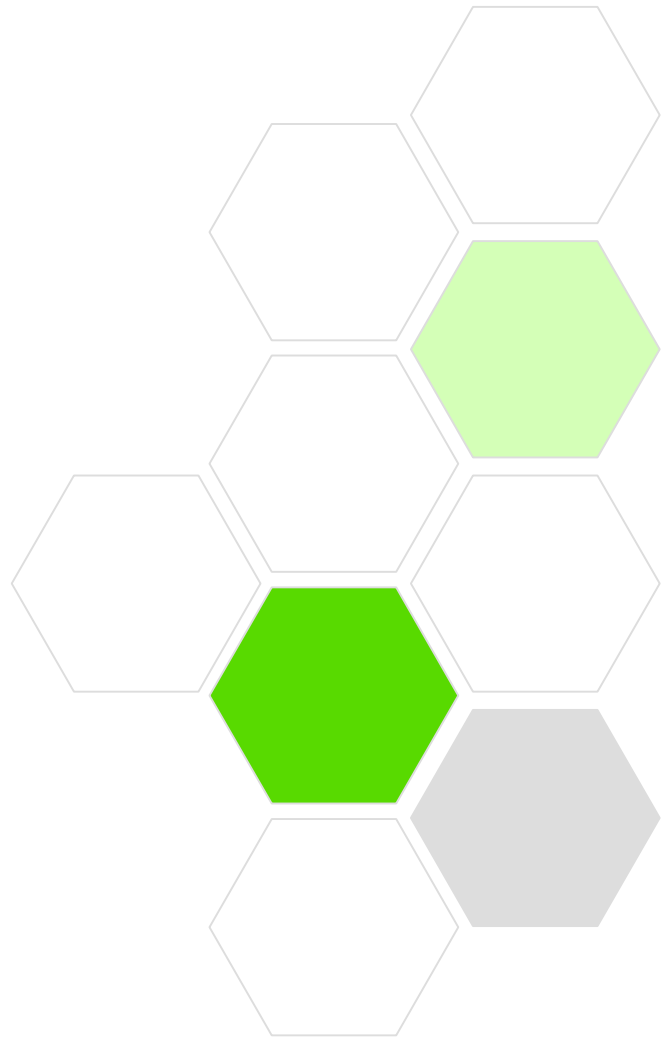




Document Management



CONTENT MANAGEMENT AND DOCUMENT MANAGEMENT

Content management requirements span both Web content and document management capabilities. The functionality required for both Web content management (WCM) and document management are similar. These functions include library functions, such as check-in and check-out, versioning, search, and categorization.

Many content management products on the market today have their roots in document management capabilities. Web content is often managed as though it is a document asset, giving users the ability to create, edit, and publish HTML documents. The shortfall of document management-based WCM comes in the creation and use of dynamic content.

With dynamic content management (dCM) system at its core, FatWire UpdateEngine gives users the capability to create, edit, and publish dynamic content as well as manage documents, ranging from Word and PDF documents to HTML files placed on a Web server. The dCM system is uniquely suited to not only bring content to Web sites but also to other mediums, including intranets, portals, and content-centric Web-based applications. Therefore, FatWire UpdateEngine is uniquely suited to bring dynamic content as well as documents to these outlets.

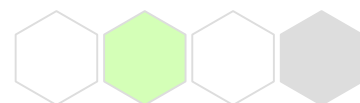
DOCUMENT MANAGEMENT USING UPDATEENGINE

This white paper describes the main document management functionality provided by FatWire. These features are available in FatWire's flagship product, UpdateEngine.

Other FatWire white papers describe UpdateEngine features that work in conjunction with the document management capabilities described in this paper. These papers are briefly described below:

- Migration Tool – Most businesses have large repositories of existing content. The Migration Tool, included with UpdateEngine, provides the ability to import existing content on the file server into the UpdateEngine repository and to continue managing the content using the UpdateEngine system.
- Content Deployment – After migrating content, businesses need to deploy the content to a Web solution. FatWire supports both publishing and dynamic delivery of content assets to a Web site or Web application

The following sections detail the complete FatWire document management approach.



NAVIGATION

Business users are accustomed to hierarchical navigation interfaces to locate their documents. Efficiency is also increased with customized workspaces where users can quickly access content items. The Favorites interface on the UpdateEngine6 Home interface (Figure 1) provides the capability for users to navigate through a directory structure containing the documents that managed by the user. Users can add and remove folder from this interface.

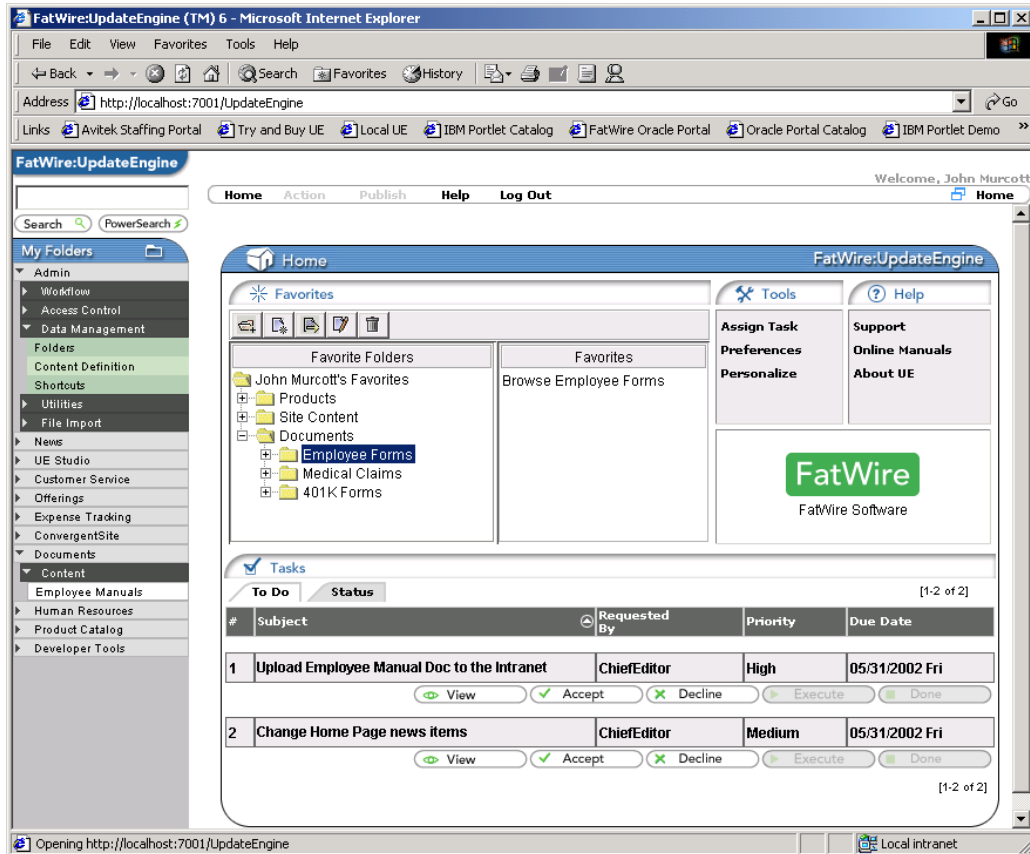


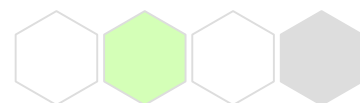
Figure 1 - The UpdateEngine Home interface provides custom navigation so that commonly accessed documents, operations, and tasks are easily accessible.

BROWSING DOCUMENTS

Business users are presented a “Browse” screen (Figure 2) of all of the documents in a repository. Users have sort options for the key fields of the document (normally the file name, title, and the like), and the last modified date for the document is displayed as well. The final column in the Browse screen indicates the workflow stage of the content. Workflows are predefined using the UpdateEngine Workflow Builder and are customized for the specific business needs.

Content management operations are also provided through the Browse screen interface. The library and workflow functions are available through this interface:

- Check in / Check out
- Edit / View
- Approve / Advanced Approve
- Reject / Advanced Reject



- Delete

Custom operations are available to this Browse screen to enhance the functionality of the interface using FatWire UE Studio. (For additional information, please see the FatWire white paper "UE Studio Overview.")

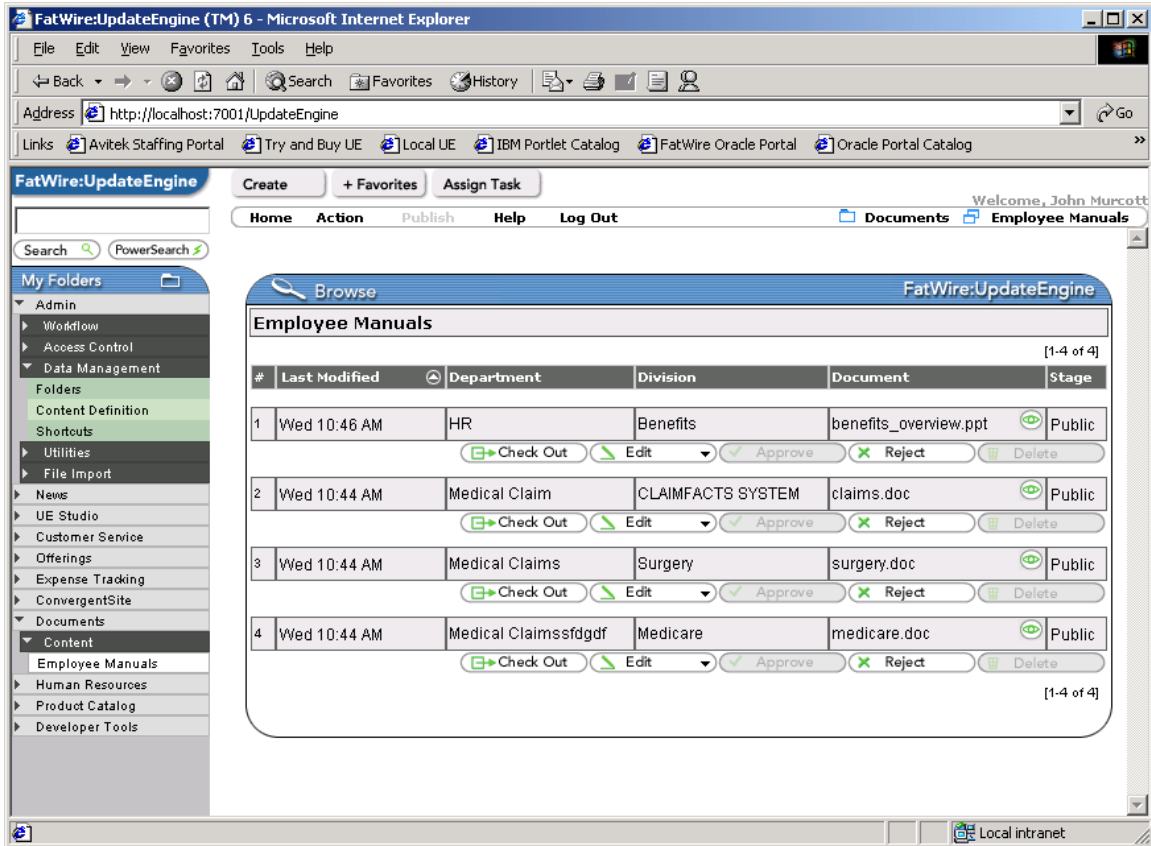
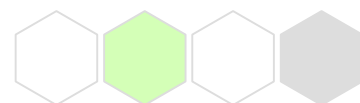


Figure 2 - The browse screen offers a snapshot of information for all the content stored in the UpdateEngine .



SEARCHING

As repositories grow, the UpdateEngine search feature greatly enhances the sorting function of the Browse screen. The Power Search screen (Figure 3) enables business users to search over the metadata associated with each document. The search then returns values based on the parameters of the search. For full text search against the document asset as well as the metadata, FatWire offers a Search Module as part of UpdateEngine6.

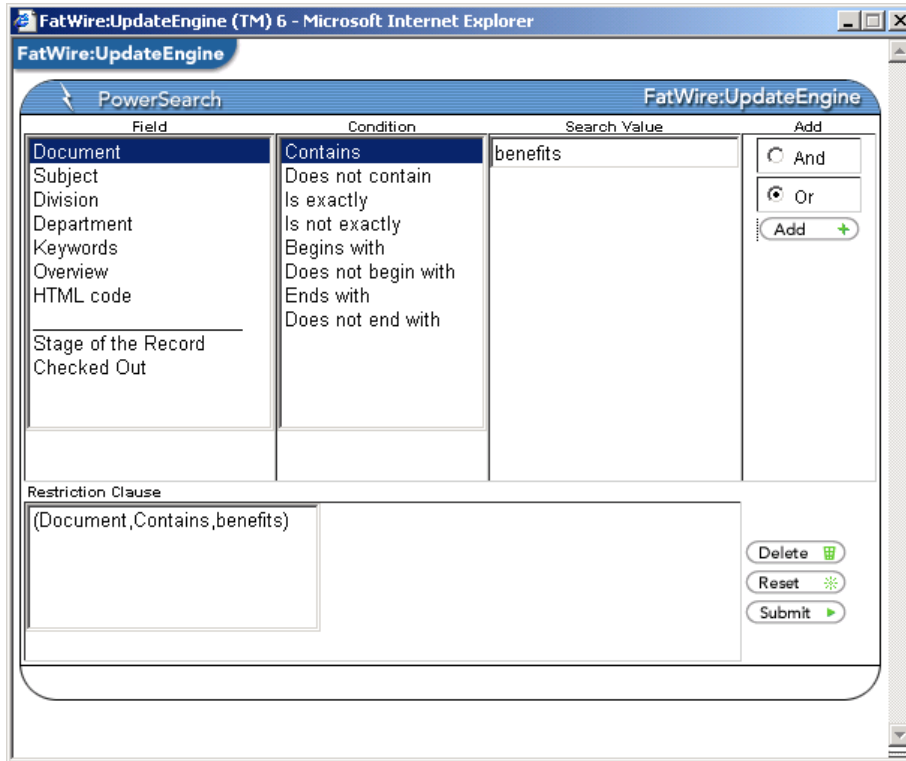
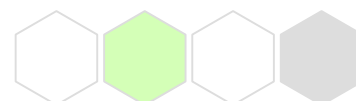


Figure 3 - The Power Search screen enables users to search across all the metadata associated with documents, so that even the largest content repositories are easily used.

MANAGING DOCUMENTS

When the user clicks on the edit button for a document, an edit screen is displayed (Figure 4). This screen provides the user the ability to modify all elements of the document – metadata, search keywords, and the document itself. All of the fields can be rolled back to eliminate inadvertent errors, including the document. Users can edit the Web content using the FatWire Web Editor tool and the documents are associated with the appropriate editor (Word in the example).



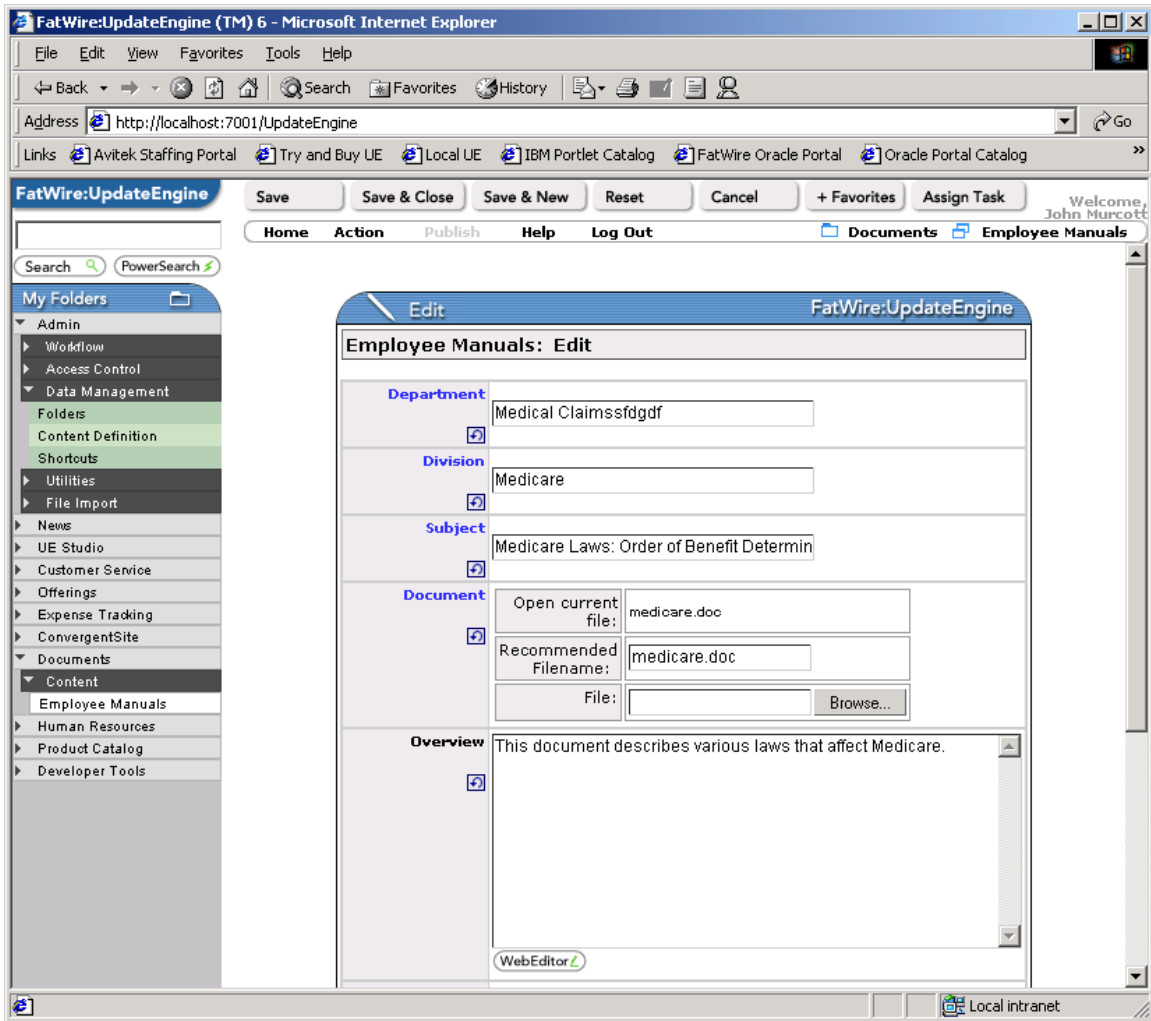


Figure 4 - The UpdateEngine Edit screen gives users a single screen in which they can access the managed document and edit the metadata used in search and for categorization on an end Web site, intranet, portal, or content-centric application.

EDITING THROUGH TEMPLATES

Many times, documents that are managed within a system are also associated with format templates so that each document has the same look-and-feel, often in line with published corporate standards. The use of templates can also enhance and simplify the assignment of metadata. Certain fields in the Word document can be tagged to be pulled into UpdateEngine as metadata.

VERSIONING AND ROLLBACK

One of the most critical steps in managing document is maintaining previous versions of the document after each change. UpdateEngine tracks the following elements as part of its rollback feature:

- Date of version
- Version number
- User who made change



- File name of previous version

For each field, there is an option to select the previous version (Figure 5) so that changes are never lost.

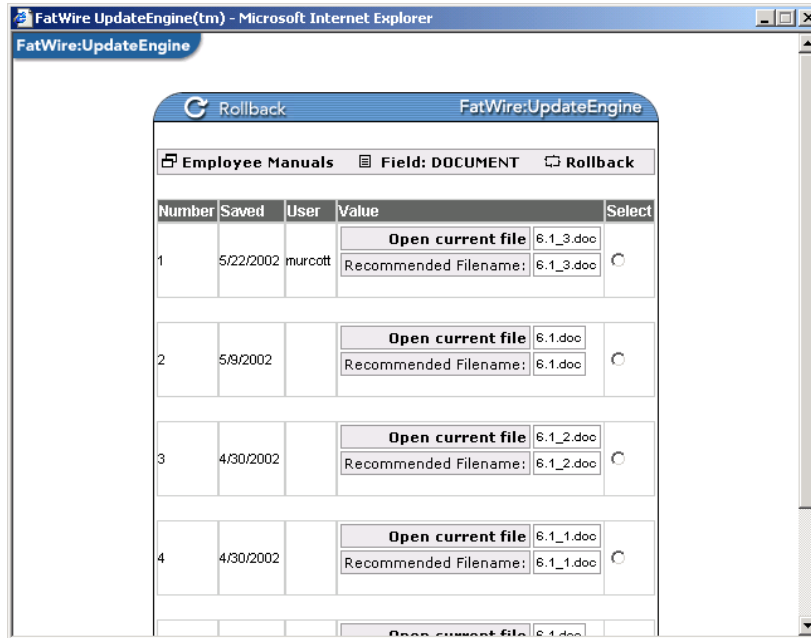


Figure 5 - Rollback interface enables users to get access to previous versions of documents, metadata, and other managed content.

DOCUMENT CONVERSION

Documents are often in formats that are either not Web-friendly or are less user friendly to present on the Web. FatWire provides capabilities for converting documents into Web accessible formats, such as HTML, PDF, or .gifs. These versions can be stored in UpdateEngine as described above, and are versioned just like any other content item.

COLLABORATION

UpdateEngine provides a number of features for collaboration to allow users to work together during the document management process.

Assignments

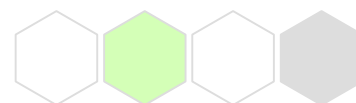
- Workflow can be initiated by “assignment” button
- Messaging supported between assigner and assignee
- Duration of task, priority, start date, end date

Status

- Indicates who accepted assignment, what is status, what is priority and due date
- Edit functionality means collaboration evolves
- Items can be removed

To Do

- View, accept, reject, reply and execute assignments



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