

# Document Management System

## Challenge

The challenge was to develop a system that would contain 50,000+ documents initially. The number of documents had to increase continuously, which, in their turn, would increase the number of workflow tasks, log entries, etc. The architecture had been planned prior to implementation to guarantee a successful completion of a fixed-price project.

## Background

The Customer turned to Artezio requesting to build a Document Management System, which had to be based on a technical specification received from the client. The system had to provide collaboration points on corporate documents, documents approval workflow and simplified access to all registered documents.

## Solution

The following architecture was defined by the Customer and improved together with Artezio:

- Four (4) site collections initially (additional Register site collection had to be created when the existing one reach edits capacity limit):
  - ✓ Content Type Hub to centralize Content Type updates and store common data;
  - ✓ Documents – a point where users work with documents (+ custom Review & Approval Workflow);
  - ✓ Register – approved documents are moved here for a permanent storing; and
  - ✓ Archive – a storage for migrated documents from a legacy system (~50,000 documents)

## Project Facts

### Customer

Lattelecom Technologies

### Technologies

- SharePoint Server 2010 Enterprise
- Visual Studio 2010, CKS: Dev, Camlex, caml.net.intellisense, SP. Dispose Checker
- JavaScript, jQuery, CSOM
- XSLT
- SharePoint Workflow

## Document Management System

- Three custom workflows:
  - ✓ Review & Approve – allows document reviewing and approving. Also, it makes it possible to delegate tasks to other employees
  - ✓ Task – allows assigning tasks, related to a specific document, to employees
  - ✓ Notification – allows sending email notifications about a specific document
- SharePoint Search Service integration – a dedicated search center that is configured to simplify the search by metadata;
- Managed Metadata Service to use terms – provides simplified taxonomy management
- User Profile Service – provides synchronization with Active Directory and additional information about each user;
- Related Items module – provides a possibility of relating items from different site collections based on Search results; and
- Substitution Module – provides functionality for reassigning tasks if an employee is out of office due to any reason

### Results

The project was completed on time and deployed in the Customer's environment, change requests and new features are planned to be implemented.