

Information Source (Technology Name and Version)	Description	Use Cases
Active Directory (ADFS 2.0), on premise	<p>EDM authenticates internal users against AD.</p> <p>EDM can retrieve user information, including location, business units, title, staff id and other active directory attributes (including extended attributes).</p> <p>EDM can retrieve Group membership for access control and other functional purposes.</p>	<p>AD user can access EDM without the need to enter the password (same as we have with DocuSign).</p> <p>Set access to objects according to location, business unit or another active directory attribute.</p> <p>Set access to objects according to AD groups.</p> <p>New users will have access to documents shared within their unit or location or other active directory attributes (as long as access level for the objects is configured based on these elements).</p>
ERP: MS Dynamics NAV 2017 (also needs support for future versions: Dynamics 365 Business Central), on premise	<p>Native connector allowing MS Dynamics NAV to create, retrieve, index and search documents from EDM with full metadata support and fully linked with NAV records.</p> <p>EDM can scan documents and create relevant and linked MS Dynamics NAV records with full metadata support.</p> <p><b>Details:</b></p> <p>The integration with the native connector allows to use both systems in parallel.</p> <p>Typically, if working from NAV you can save/archive any document into EDM by using NAV actions (add or scan).</p> <p>Also, a document can be created with print action for NAV records. Furthermore, a new version can be saved every time it is printed from NAV (save paper and/or improve records).</p> <p>The documents are saved into EDM with index data coming from NAV and retaining links between the systems.</p> <p>Document stored in EDM can all still be retrieved from NAV, for example View from customer card can see all customer invoices.</p> <p>Sending document from EDM into NAV is also possible by linking the documents previously scanned into EDM with NAV.</p> <p>This could be significant use case in some scenarios e.g. if batch scanning or if we have documents already scanned with partial metadata.</p> <p>Furthermore, EDM can create index files in XML format which can be imported in NAV.</p>	<p>Save invoice from EDM to NAV with full metadata and link records.</p> <p>Scan invoice into EDM and NAV with full metadata and link records.</p> <p>Print NAV document into EDM and create a record linked to NAV.</p> <p>Search documents in EDM using NAV document number, customer number, document date and any other metadata.</p> <p>Update document in EDM and NAV.</p>

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	<p>Additionally EDM should be able to retrieve the list of dimension values and other data using MS Dynamics NAV <a href="#">OData API</a> and use these as vocabularies for some metadata attributes (list of projects, list of cost centers, list of vendors, list of customers, list of awards, etc.).</p> <p>Typical Document Types</p> <ul style="list-style-type: none"> <li>• Customer Documents</li> <li>• Vendor Documents</li> <li>• Posted Sales Invoice (Outgoing)</li> <li>• Sales Order (Outgoing)</li> <li>• Posted Vendor Invoice (Barcode)</li> <li>• Vendor Invoice (Send to NAV)</li> </ul>	
DocuSign	Native connector allowing EDM to sign documents using DocuSign service and that allows DocuSign to store signed contract in EDM with full metadata support.	Send document(s) from EDM to be signed in DocuSign. Receive signed version of the document in EDM and file it correctly.
Outlook/Exchange, on premise	Native connector for Outlook to create, retrieve, index and search file attachments and e-mails with full metadata support.	
Network folders	Native client to create, retrieve, index and search documents through the network file system mapping of the EDM.	

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<p>Programme and Project Portal (custom built .NET application), on premise</p>	<p>Custom application, will need integration through API. Custom application needs to create, retrieve, index and search documents with full metadata support.</p> <p><b>Details:</b> IUCN will at minimum need to call the API methods to</p> <ul style="list-style-type: none"> <li>• Create document</li> <li>• Update document</li> <li>• Delete document</li> <li>• Get document</li> <li>• Get metadata</li> <li>• Set metadata</li> </ul> <p>Additionally, we might need to</p> <ul style="list-style-type: none"> <li>• List contents of a folder</li> <li>• Filter/search contents of a folder</li> </ul> <p>Applications access to the API should be authorized. User authentication should be transparent as the portal is using ADFS SSO (access to API repository should not have to reauthenticate). In terms of standards REST is preferred over SOAP where there is an option. Supports for standards such as CMIS and WebDAV is a plus. <i>Note:</i> For future implementations some workflows might need to be created (currently not in scope)</p>	<p>Documents uploaded to project portal workflow are saved in EDM as backend with full metadata and the link between the records is established. Project portal workflow documents can also be linked to existing documents in the EDM during the upload step. Documents are searchable in EDM based on project portal specific metadata. Project records can be accessed from EDM documents for project related documents.</p>
<p>Grants Portal (custom built .NET application), hosted</p>	<p>Custom application, will need integration through API. Custom application needs to create, retrieve, index and search documents with full metadata support</p> <p><b>Details:</b> Same as Programme and Project Portal, except hosted. This might impact authentication.</p>	

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E-Tendering, cloud	Connector allowing E-tendering system to create, retrieve and search documents related to the tendering process in EDM. <b>Details:</b> Same as Programme and Project Portal, except hosted. This might impact authentication.	