

Software Product Description

PRODUCT NAME: Team Document Library (TDL) Solution
from Digital and IDI®, Version 1.0

SPD 41.83.01

DESCRIPTION

The Team Document Library (TDL) Solution from Digital and IDI is a structured, scalable electronic library for managing dynamic document collections within departments of any industry. This integrated solution combines proven software and services from Digital Equipment Corporation and Information Dimensions, Inc. (IDI).

TDL uses a Network Application Support (NAS) compliant client/server approach that combines a "point and click" graphical user interface (GUI) for Windows PC users with content-based retrieval and database management capabilities on the server.

TDL provides the ability to store, retrieve, and manage documents throughout a local area network (LAN) regardless of the application that was used to generate the information. With TDL, users can organize documents within the model of electronic cabinets, drawers, and folders. TDL also facilitates the control of documents and their life cycle through functions such as check-in, check-out, and revision management. TDL also enables users to efficiently share data while at the same time maintain control over multiple local originals and latest revisions.

TDL tracks important information about the documents it is controlling, such as who worked on the document, when it was worked on, and what comments were made during review. As documents are stored in TDL, text is automatically indexed and documents are immediately available for content-based retrieval. Document text converters for Microsoft Word (RTF) and WordPerfect™ are included in the solution. Other converters can be added as options.

Documents may be accessed and recalled for viewing or revision in one of four ways:

- Content-based queries against the textual contents of a document and/or the comments attached to it
- Content-based queries against associated fields attached to a document, such as author or title

- Database-style queries, such as looking for a document created within a certain date range
- Icon-based queries using the mouse to click on a cabinet, drawer, or folder

Using the BASISplus® administrator functions, the TDL Library Administrator can define and manage TDL users, generate reports on document history, and archive and restore inactive documents. The TDL Library Administrator must be comfortable with using forms and a query language to access databases, but need not be a programmer or database expert.

A Startup Services package is included with the TDL Solution to provide installation and startup, to provide GUI tailoring to address site-specific needs, to train the Library Administrator, and to initiate document preparation and loading.

TDL Solution Features

Distributed Architecture

TDL consists of server software and client software. A user may access the library from any PC in a PATHWORKS local area network that has the TDL client software installed. The server processes all of the commands and communicates back to the users through the TDL client GUI. The information about the documents, as well as the actual revisable document contents, are managed in a BASISplus database according to the pre-defined TDL database definition.

Ability to Manage Heterogeneous Data

TDL is an application-independent information manager. Documents that contain convertible text are automatically indexed for content-based retrieval. All other forms of documents, such as images, graphics, or illustrations, are stored as binary large objects in the database and may be retrieved by fielded data or comments.

Hierarchical Data Structure

TDL is based on a familiar Cabinet, Drawer, and Folder storage model that is capable of providing hundreds of unique containers for TDL documents. The actual structure of the hierarchy is defined by the Library Administrator to ensure that users file documents only in locations to which they have access. Users select among storage locations via simple pulldown menus.

The terms for the hierarchy levels (Cabinet, Drawer, Folder) can be tailored to the customer's environment. For example, the hierarchy for a technical documentation environment could be changed to Bookshelf, Book, and Chapter. The hierarchy for a litigation support environment could be changed to Practice Type, Client, and Matter.

The predefined database definition for the TDL structured library includes the following fields:

- Three levels of hierarchy (Cabinet/Drawer/Folder)
- Title (240 characters, any format)
- Version number (assigned by TDL)
- Author (240 characters, any format)
- Revised by (240 characters, any format)
- Entered by (assigned by TDL)
- Creation date (user entry to support back files)
- Revision/entered date (assigned by TDL)
- Comments (5000 characters)
- Application/Format (user selectable)
- Security (user selectable)
- Two optional fields (80 characters, customer-specific)

The unique key for a document is the combination of Cabinet, Drawer, Folder, Title, and Version.

Version Management

As documents are revised, TDL keeps copies of each successive revision and automatically assigns new version numbers. Users can see what revisions exist and view or copy any versions, but only the latest version of any document may be checked out for revision. TDL provides user-definable options to generate lists of all document versions or only the latest version. Activity on documents is recorded in a detailed history that can be accessed by the Library Administrator.

Content-Based Retrieval

TDL's content-based retrieval capabilities enable users to access and retrieve documents based on actual document content, without needing to know document names, titles, or authors. Users can also search on structured fields (such as names, dates, or titles) to locate documents. TDL provides users with retrieval options such as phrase searching and Boolean searching utilizing the standard PC point and click mechanism.

Access Control/Security

TDL is delivered with a default two-level Public/Private security model. A more robust security model based on customer needs can be implemented as part of the Startup Services that are included with the TDL Solution. TDL allows for several security options such as:

- **Separate TDL Libraries** - By building different libraries, independent groups or departments may have their own library which can or cannot be shared depending upon user requirements, user responsibilities, and document content. This will allow for separate ownership of library files and library maintenance.
- **Model Level Security** - The TDL library may be split into different models with different user access to the different models. A model describes a database as seen by a specified group of users. It enables the same data to be seen and accessed in different ways, based upon user requirements.
- **Group Security** - Individual users can be assigned different group access codes to establish the level of access to all or specified documents in a library.
- **User Level Security** - Individual privileges to a library or Model may be granted to each individual which in turn determines the level of access to an object. The Library Administrator assigns privileges to each TDL user to determine whether that user may view, revise, or delete documents.
- **Customized Security (Optional)** - For more specialized security needs, different combinations of the previous features can be provided in a tailored fashion. The customized security implementations is an option. It is recommended that customers utilize TDL for some time initially to define these customized security requirements.

Easy-to-use GUI

The TDL solution includes customizable Windows client software capable of running on any properly configured 386/486 PC. All user functions are invoked by means of menus, fields, and function buttons. Users need not deal with direct entry of complex database or Boolean commands, but merely rely on the point-and-click options available to them.

Application Integration

TDL provides integration of popular desktop applications such as Microsoft® Word, WordPerfect, DECwrite for Windows, Excel®, and Windows Paint. Users can continue to use their familiar desktop applications while maintaining control of the associated documents within the library. Applications may be manually or automatically launched from within the TDL environment.

This integration also provides users with the ability to store documents in the library regardless of the creation tool. Once stored in the library, users can select their preferred editor, transfer a document to their desktop, and upon transfer, launch the selected editor.

Integrated Converters

Document text converters for Microsoft Word and WordPerfect are included in this solution. With the integrated converters, users of WordPerfect can access documents NOT created in their editor and TDL will perform an automatic document format conversion (assuming that the appropriate converters have been installed). For example, the Keypak converters will convert the documents from Microsoft Word to WordPerfect or vice versa.

User Functions

List

The list function generates a listing of all documents to which a user has access within any segment of the multi-level hierarchy. Documents to which a user does not have access rights (at least read) will not be included in document listings. A full or partial title qualifier may be included as a list qualifier. Each user may define a preferred listing sort order based on four user-selectable database fields in ascending or descending order. A document listing may be copied to the Windows clipboard.

Search

The Search function enables a user to search for a document based on any combination of database fields and /or document content. Search specifications may include partial or full word wildcards. Dates may be qualified by since, before, or on.

Document text and/or comments searches may be based on:

- An exact match of the search phrase;
- All the words in the search phrase in the same order but without regard to insignificant words (and, the, etc.);
- Any of the words in the search phrase in any order without regard to insignificant words;

- All the words in the search phrase in any order without regard to insignificant words;
- A Boolean "and" or "or" (but not mixed) combination of up to four words, optionally constrained to occur within a specified number of words or sentences, in the order entered or in any order.

All search options are selected by button clicks and field entries. The user need not deal with direct entry of Boolean expressions.

View

The view function enables a user to view the structured fields, comments, and an ASCII rendition of the contents (if any) of a selected document. The requested search terms found (matches) are highlighted within the view window. Function buttons enable the user to scroll through the document, view the next or previous match for a search term, or view the next or previous document in a result set listing. The view function is intended to enable users to browse through that document quickly to verify that it is one on which they want to work. For non-textual files, e.g., a TIFF image, only the structured fields and comments may be viewed.

Check In

The check in function enters a new document or new version of an existing document into the library. Users must have successfully checked out a document before they can check in a new version of an existing library document.

Check Out

The check out function reserves the latest version of a document and copies it to the user's desktop file system for revision/update purposes. Only one user may have a given document checked out at any time. Other users may request an original copy of a checked-out document at any time. Older versions of documents in the library cannot be checked out but may be copied. A user-definable option provides for automatic launch of the application used to create the checked-out document.

A cancel check out function is provided to enable a user to cancel a check out reservation on a document without creating a new version.

Copy to Desktop

The Copy to Desktop function copies any version of a document to the user's desktop file system. Typical usage might be to view a formatted document or to use one or more existing documents or templates as a basis for creating a new document. A user-definable option provides for automatic launch of the application used to create the copied document.

Launch Application

A user may launch a desktop application from within TDL at any time. The list of available applications and a preferred default is defined in a configuration file that can be maintained by each user. The user may change the default application at any time from within TDL. Any application that can be invoked from within Windows or MS-DOS may be launched (including WordPerfect, MS-Word, Excel, etc.). If the format of a document to be copied or checked out is different from the user's default application, the user may choose to change the default application to match the document or specify that the document be converted to their default format. (Note: This assumes that the appropriate converter has been installed.)

Library Administrator Functions

User Management

The Library Administrator can use the BASISplus system administrator (DMSA) functions to add new authorized library users, modify user passwords, change user security, and delete library users.

Document History

TDL maintains a record of the activity on the documents it manages. The Library Administrator can use the BASISplus database administrator (DMDBA) functions to obtain this information and generate reports on document and user activity. This could include, but is not restricted to, audit reports or summary reports based upon the structured field content (such as a report of all documents by specified author within a specified cabinet, drawer, and folder).

Archive and Restore

The Library Administrator can use the DMDBA functions to archive and restore inactive documents.

Query and Database Access

BASISplus Fundamental Query and Manipulation (FQM) commands allow the Library Administrator to display and generate reports on various aspects of the TDL database. FQM supports a full range of Boolean and relational operators as well as mathematical functions and expressions. The BASISplus Command Procedures Language (Procs) enables the Library Administrator to build applications by combining query and display commands with programming constructs such as global and local variables and IF-THEN-ELSE, FOR, WHILE, and LOOP control statements.

High Volume Update

The BASISplus High Volume Update (HVV) module enables loading of large batches of documents directly into the library. Using HVV, the Library Administrator can import and export documents to and from a TDL database using various file formats and document converters. The HVV module can be utilized to facilitate the automatic loading of existing or legacy documents into the library.

Documentation

The following manuals are included in the TDL documentation kit:

- *TDL Quick Start Guide* (includes Client Installation)
- *TDL Release Notes*
- *TDL Administrator's Guide*
- *TDL Server Installation Guide*

Help

Online help is available for TDL menus, fields, and functions.

HARDWARE REQUIREMENTS

Processor and/or hardware configurations as specified in the System Support Addendum (SSA 41.83.01.x).

SOFTWARE REQUIREMENTS

Server Software

- VMS Operating System
- DECnet-VAX
- PATHWORKS for VMS (DOS Server)

PATHWORKS for VMS is required on VMS to support any DOS or Windows clients using DECnet as the communication transport between client and server.

Client Software

- MS-DOS Operating System
- Microsoft Windows
- PATHWORKS for DOS

Refer to the System Support Addendum (SSA 41.83.01-x) for availability and required versions of prerequisite /optional software and for information regarding components of TDL.

ORDERING INFORMATION

TDL is a packaged solution that includes software, documentation, and services for the VAX server and 20 Windows users.

YS-TD1AA-DA

TDL Solution Package, including BASISplus components, Keypak Converters for WordPerfect and Microsoft Word, client software for 20 Windows clients, media & documentation, installation, training, and GUI tailoring services.

Server and client software may be ordered separately as follows:

YS-TDMAA-DA

TDL Server-only Package, including BASISplus components, Keypak Converters for WordPerfect and Microsoft Word, server media & documentation, installation, training and GUI tailoring services.

YS-TDCAD-WA

Client software for one Windows Client user, media & documentation (Quick Start Guide).

SOFTWARE LICENSING

This software is furnished under the licensing provisions of Digital Equipment Corporation's Standard Terms and Conditions. For more information about Digital's licensing terms and policies, contact your local Digital office.

SOFTWARE PRODUCT SERVICES

A startup services package is included with the TDL Solution to provide for installation and startup, to provide minor GUI tailoring to address site-specific needs, and to train the customer's Library Administrator. The following services are included:

- Definition and creation of up to two TDL libraries
- Definition of two additional TDL library fields
- Training for up to three people to register TDL users
- Implementation of one of the predefined TDL security schemes and training for one person to configure user security codes
- Training for up to three people on the data loading process for MS-Word or WordPerfect documents into TDL. Actual loading of up to 25 documents as part of this training process.
- Training for one (1) person to initiate and read the audit trail tools for TDL

Additional customization services are optional and are available from Digital and IDI. For more information, contact your local Digital office.

SOFTWARE WARRANTY

The software product is warranted to conform to the Software Product Description (SPD). This means that Digital will remedy any nonconformance when it is reported to Digital by the customer during the warranty period.

The warranty period is 90 days. It begins when the software is installed or thirty days after delivery to the end user, whichever occurs first and expires 90 days later. All warranty related support for this software will end one year after release of the subsequent version. Additional warranty support for the initial one year period can be purchased directly from IDI.

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System Support Addendum

PRODUCT NAME: Team Document Library (TDL) Solution
from Digital and IDI®, Version 1.0

SSA 41.83.01-A

HARDWARE REQUIREMENTS

Processors Supported

VAX: VAX 4000 Model 200,
VAX 4000 Model 300,
VAX 4000 Model 400,
VAX 4000 Model 500,
VAX 4000 Model 600

VAX 6000 Model 200 Series,
VAX 6000 Model 300 Series,
VAX 6000 Model 400 Series,
VAX 6000 Model 500 Series,
VAX 6000 Model 600 Series

VAX 8200, VAX 8250, VAX 8300,
VAX 8350, VAX 8500, VAX 8530,
VAX 8550, VAX 8600, VAX 8650,
VAX 8700, VAX 8800, VAX 8810,
VAX 8820, VAX 8830, VAX 8840

VAX 9000 Model 110,
VAX 9000 Model 210,
VAX 9000 Model 300 Series,
VAX 9000 Model 400 Series

VAX-11/730, VAX-11/750,
VAX-11/780, VAX-11/785

MicroVAX: MicroVAX 3100 Model 10/10E,
MicroVAX 3100 Model 20/20E,
MicroVAX 3100 Model 30,
MicroVAX 3100 Model 40,
MicroVAX 3100 Model 80,
MicroVAX 3300, MicroVAX 3400,
MicroVAX 3500, MicroVAX 3600,
MicroVAX 3800, MicroVAX 3900

VAXstation: VAXstation 3100 Model 30,
VAXstation 3100 Model 38,
VAXstation 3100 Model 40,
VAXstation 3100 Model 48,
VAXstation 3100 Model 76,
VAXstation 3200, VAXstation 3500,
VAXstation 3520, VAXstation 3540

VAXstation 4000 Model 60,
VAXstation 4000 VLC

VAXserver: VAXserver 3100, VAXserver 3300,
VAXserver 3400, VAXserver 3500,
VAXserver 3600, VAXserver 3602,
VAXserver 3800, VAXserver 3900

VAXserver 4000 Model 200,
VAXserver 4000 Model 300,
VAXserver 4000 Model 500

VAXserver 6000 Model 210,
VAXserver 6000 Model 220,
VAXserver 6000 Model 310,
VAXserver 6000 Model 320,
VAXserver 6000 Model 410,
VAXserver 6000 Model 420,
VAXserver 6000 Model 510,
VAXserver 6000 Model 520,
VAXserver 6000 Model 610,
VAXserver 6000 Model 620,
VAXserver 6000 Model 630

Processors Not Supported

MicroVAX I, MicroVAX II, MicroVAX 2000, VAXft Model 110, VAXft Model 310, VAXft Model 410, VAXft Model 610, VAXft Model 612, VAXstation I, VAXstation II, VAXstation 2000, VAXstation 8000, VAX-11/725, VAX-11/782

Other Hardware Required:

Server Hardware

The TDL server software can be installed on any VAX system that can support the required software versions listed under *SOFTWARE REQUIREMENTS* and that meets the minimum requirements listed below:

- 64 MB minimum memory
- Three disk drives (System disk, BASISplus Kernel, User disk)
- TK50 or 1600 BPI magtape load device

Disk Space Requirements (Block Cluster Size = 1):

Disk space required for installation:	260,000 blocks (130M bytes)
Disk space required after installation (permanent):	195,000 blocks (97.5M bytes)
Disk space required for database on server (permanent):	10,000 blocks (5M bytes)

These counts refer to the disk space required on a drive other than the system disk. The sizes are approximate; actual sizes may vary depending on the user's system environment, configuration, and software options. The initial TDL database should reside on a disk that is separate from the BASISplus Kernel and user files. Additional space must be allocated to accommodate expected database growth as documents are added to the library.

Client Hardware

The TDL client for Windows requires a fully compatible MS-DOS® PC with at least the following:

- IBM® 386 or higher compatible running at 20Mhz or greater
- 6 MB memory (minimum)
- 80 MB hard drive
- 3.5" floppy drive
- PATHWORKS compatible Ethernet Card
- VGA monitor (color or black & white)
- Windows supported Mouse
- Standard Digital or IBM keyboard

CLUSTER ENVIRONMENT

This layered product may be installed in a VAXcluster configuration, but does not take advantage of cluster failover. (Note: As an option, the BASISplus® Network Access Module (NAM) is available directly from IDI® and will provide cluster failover). The *HARDWARE REQUIREMENTS* sections of this product's Software Product Description and System Support Addendum detail any special hardware required by this product.

* V5.x VAXcluster configurations are fully described in the VAXcluster Software Product Description (29.78.xx) and include CI, Ethernet, and Mixed Interconnect configurations.

SOFTWARE REQUIREMENTS

For the TDL Server for VMS to Support Any or All Windows Clients:

- VMS Operating System V5.4 - V5.5
- DECnet-VAX V5.4 - V5.5
- PATHWORKS for VMS (DOS Server) V4.1

VMS Tailoring:

The following VMS classes are required for full functionality of this layered product:

- VMS Required Saveset
- Network Support
- Programming Support
- System Programming Support
- Secure User's Environment
- Utilities
- OPTL - Miscellaneous Files

For more information on VMS classes and tailoring, refer to the VMS Operating System Software Product Description (SPD 25.01.xx).

For Windows Clients on the PC:

- MS-DOS Operating System V3.3 - V5.0
- Windows V3.0 - V3.1
- PATHWORKS for DOS V4.0 - V4.1

OPTIONAL SOFTWARE

TDL is designed to work with a wide range of standard desktop applications, the selection of which is up to the user. In addition, the following options can be added to TDL by Digital and IDI. Contact your local Digital sales office for more information.

Digital Provided:

- Other KeyPak word processing converters
- Digital CDA Converter Library
- NetWare® Coexistence

IDI Provided:

- Thesaurus Management
- Image Series
- Network Access Module

GROWTH CONSIDERATIONS

The minimum hardware/software requirements for any future version of this product may be different from the requirements for the current version.

DISTRIBUTION MEDIA

9-track 1600 BPI Magtape (PE), TK50 Streaming Tape

ORDERING INFORMATION

The operation of this product requires a TDL Server license and at least one client license.

- YS-TD1AA-DA - TDL Solution Package (Includes 20 Windows Clients)
- YS-TDMAA-DA - TDL Server-only Package
- YS-TDCAD-WA - Windows Client Software (each)

The above information is valid at time of release. Please contact your local Digital office for the most up-to-date information.

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