# CARA

## CARA Alfresco Portal for secure, cost-effective watermarked viewing of content created in Documentum

CARA Portal. Welcome Administrator! Documents were last updated on 2012 Jul 15 at 15:33:58 CEST

**General criteria**

| | |
|---|---|
| Document Type: | SOP |
| Division: | * |
| Department: | * |
| Full Text Search: | Not available for all documents |

**Property criteria**

Search | Save search | Load search | Dictionary Manager | Taxonomy Manager | Configuration | Logout...

**Navigation**
- My Desk
  - Favorites
    - Courtney
    - MPI-SOP-QC-GEN-0013
    - MPI-SOP-QC-GEN-0013
  - Cabinets

View document | Properties | Show URL | Remove from fav.

**Content** — Details | List | Thumbnails

| Name | Version Label | Created by | Creation Date | Document Type | Department | Group |
|---|---|---|---|---|---|---|
| MPI-SOP-QC-GEN-0013 | 1.0 | admin | 4/14/12 12:00 AM | SOP | Quality Control | General |
| ADMI SOP | 1.0 | admin | 4/14/12 12:00 AM | SOP | Administrative | All |
| 1111AAAA | 1.0 | admin | 4/14/12 12:00 AM | SOP | Administrative | |
| 381.pdf | 1.0 | admin | 6/19/12 3:00 AM | SOP | Documentation | Equipmen |
| Document 2137261735321504140.pdf | 1.0 | admin | 6/17/12 12:00 AM | SOP | Documentation | Equipmen |
| Document 4279904108356695143.pdf | 1.0 | admin | 6/17/12 12:00 AM | SOP | Documentation | Equipmen |
| Document 1394208942508367953.pdf | 1.0 | admin | 6/17/12 12:00 AM | SOP | Documentation | Equipmen |
| Document 1881444874311070313.pdf | 1.0 | admin | 6/17/12 12:00 AM | SOP | Documentation | Equipmen |
| Document 780974758565058559.pdf | 1.0 | admin | 6/17/12 12:00 AM | SOP | Documentation | Equipmen |
| Document 1415765447220695615.pdf | 1.0 | admin | 6/17/12 12:00 AM | SOP | Documentation | Equipmen |
| Document 3094063170977192691.pdf | 1.0 | admin | 6/17/12 12:00 AM | SOP | Documentation | Equipmen |
| Document 8270990147661163130.pdf | 1.0 | admin | 6/17/12 12:00 AM | SOP | Documentation | Equipmen |
| Document 8701746131386307545.pdf | 1.0 | admin | 6/17/12 12:00 AM | SOP | Documentation | Equipmen |
| Document 8979291323075345348.pdf | 1.0 | admin | 6/17/12 12:00 AM | SOP | Documentation | Equipmen |
| Document 7573723657282175385.pdf | 1.0 | admin | 6/17/12 12:00 AM | SOP | Documentation | Equipmen |
| Document 3824896035303092056.pdf | 1.0 | admin | 6/17/12 12:00 AM | SOP | Docu |
| Document 4270795927904421274.pdf | 1.0 | admin | 6/17/12 12:00 AM | SOP | Docu |
| Document 1360002430072997689.pdf | 1.0 | admin | 6/17/12 12:00 AM | SOP | Docu |
| Document 3760965478896002186.pdf | 1.0 | admin | 6/17/12 12:00 AM | SOP | Docu |
| Document 6698153536954777929.pdf | 1.0 | admin | 6/17/12 12:00 AM | SOP | Docu |

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**Widgets**

**Properties**

| Property | Value |
|---|---|
| Name | MPI-SOP-QC-GEN-0013 |
| Document Type | SOP |
| Department | Quality Control |
| Group | General |
| Locations | Morgantown |
| Previous SOP | 6090 |
| Applies to | Quality Control |
| Status | Effective |
| Documentum Object ID | 0912d9eb8035e2fe |
| Content Stream Length | 170122 |

## Cost-saving solution for secure large-scale viewing of content created in Documentum

### THE PROBLEM

A high license cost is incurred by a large number of read-only users who need to view content that is created in Documentum by a relatively smaller set of users.

### THE SOLUTION

The documents continue to be created and managed in Documentum. However, for the large number of read-only users, the CARA Portal on Alfresco, allows them to view this content from a platform that offers more security, scalability and PDF watermarking control than a simple website, but avoids the large cost of additional licenses for Documentum. The solution schedules migration of content to (or removal of content from) Alfresco, which can be extremely competitive for large-scale numbers of users, and offers all the robust scalability, searchability and security of Documentum, even in the free Community Edition.
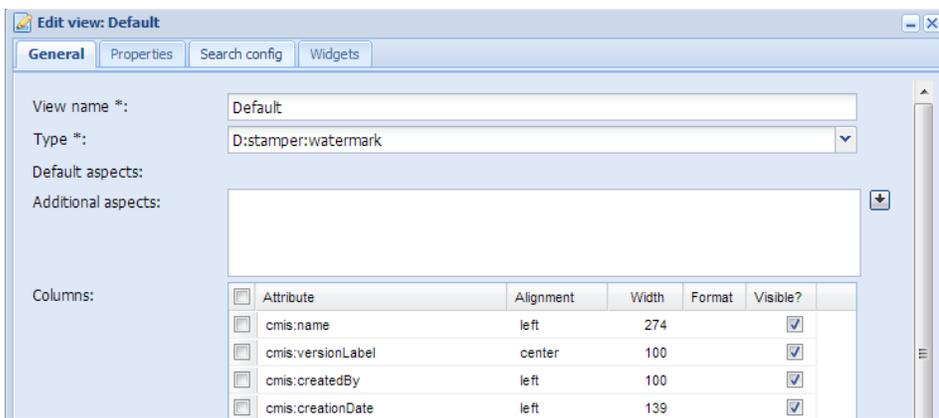
## End user features

### SEARCH

Users can formulate searches based on taxonomies, metadata, or even full text. The searches themselves are fully configurable per Document View, so different groups of users can have different search attributes and dropdowns available.

### VIEWING WITH WATERMARKING

The ability to watermark content with data (e.g. status, the name of the user, the date viewed and other validity information) in order to ensure security is a often a key user requirement. The DocSecure module allows companies to configure these overlays, and the migration tool ensures that document metadata is kept synchronized in Alfresco when updated in Documentum.

### OTHER FEATURES

See the second page.

## Edit view: Default

| General | Properties | Search config | Widgets |

View name *: Default
Type *: D:stamper:watermark
Default aspects:
Additional aspects:

Columns:

| | Attribute | Alignment | Width | Format | Visible? |
|---|---|---|---|---|---|
| ☐ | cmis:name | left | 274 | | ☑ |
| ☐ | cmis:versionLabel | center | 100 | | ☑ |
| ☐ | cmis:createdBy | left | 100 | | ☑ |
| ☐ | cmis:creationDate | left | 139 | | ☑ |

## CARA Portal on Alfresco to view Documentum content

A relatively small number of users will create content in companies which then needs to be consumed by a large number of users. Documentum is a leading platform for the creation of such controlled content, but often the scale and cost of licensing required for viewing content created in Documentum is prohibitive. Examples of such content are:

- SOPs
- Company policies and procedures
- Content to share with third parties

Generis provides a solution which gives customers the same rigorous control of security, auditing, configurability and scalability as keeping everything in Documentum, but offers a major cost saving by comparison. This involves scheduled (e.g. nightly) migration of content to Alfresco, from where users can search and view watermarked and ACL controlled content, with administrators able to configure the views, display and options available to users.

Alfresco is the leading open source platform for business critical document management, created by one of the original founders of Documentum, and is a modern, robust, scalable and highly performing platform.

The CARA solution works as follows:

- **Migration job** – a pair of jobs export content from Documentum and import it into Alfresco. The schedule can be configured, as can the set of documents to be migrated (e.g. migrate newly Effective documents, migrate a request to delete newly Obsoleted documents).

- End users can find content through a **search**, or if preferred through tree **navigation**. Users can also save searches and then re-run those saved searches at a later time.

- End users can view document **properties** in columns, a widget, or a popup screen (all configurable).

- End users view content which can be **watermarked** with the DocSecure tool to overlay properties, date and time information, user information or other controls and text.

- End users can add or remove documents from their **Favorites**.

- Full **auditing** of user activities can be configured in Alfresco.

- Administrators can configure **Dictionaries** and **Taxonomies** of data values to be used by users when formulating their searches (see right hand panel).

- Administrators can configure **Document Views** (see right hand panel).

- Fully **mobile device** compatible – phones and tablets.

- Users can choose from a set of **themes** for the display.

## Configurations

### DICTIONARIES

Dictionaries are sets of data values which can be associated with attributes, giving users picklists to choose from; for example, when running a search. These can be maintained through the configuration or imported / migrated from Documentum using the migration job.

### TAXONOMIES

Taxonomies are ways to relate multiple dictionaries: e.g. Value "Asia" in Dictionary "Continent" has only values "India" and "China" available as values from Dictionary "Country". Again, these are maintained in the Portal or migrated from Documentum using the migration job.

### VIEW MANAGEMENT

With CARA Portal, different views can be configured for different groups of users using View Management, just like in the main CARA application. Different options can be made available to different users, who can then personally select options to create their own, individual view. These settings include:

- The availability and formatting of columns, from the arrangement of a date to the addition of a custom attribute.

- Which Widgets are available (for example: Properties, Versions, and many more)

- How documents are displayed: in list, thumbnail, carousel, and other display possibilities

- Page settings

## Contact us

Please contact us to arrange a demo or request additional information. We also provide free, fully functional evaluation downloads so that you can work with our products and ensure they meet your requirements.

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