

Generis



CARA user interface and configuration layer
for CMIS-compliant repositories
including Documentum, SharePoint and Alfresco



Next generation user interface to Documentum, SharePoint and Alfresco

Overview – building on the foundation of v2

CARA³ is a brand new and unique concept – ergonomically designed, fast, single browser window to connect individually or simultaneously to Documentum, SharePoint and Alfresco and other repositories using CMIS and repository-specific extensions beyond CMIS. It is designed to facilitate the creation, review, approval and management of documents. It leverages core repository Documentum functionality while also providing performance enhancements and ergonomic improvements. In addition, CARA³ provides new functionality to better manage controlled documents such as SOPs or complex documents such as reports or submissions through CARA³ Structures and through reporting tools like the *Task Manager* and *Status Manager*. CARA³ is underpinned by the Generis DocConfigurator product which allows rapid setup and configuration of the docbase to requirements.

The screenshot shows the CARA3 web interface in Mozilla Firefox. The browser address bar shows <http://vmware:8083/cara-gxt/>. The main content area is titled "Documentum Explorer: demo" and displays a document list with columns for Name, Version Label, Status, Owner Name, and document_type. The document list includes items like "Study Report Document", "BMS testing screenshots script 18", "BMS testing screenshots script 8", and "SOP-Clinical-004".

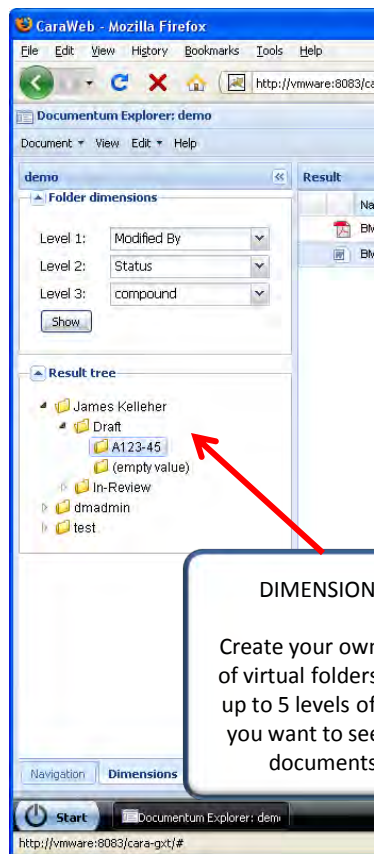
Annotations with red arrows point to specific features:

- TREEPANEL:** Points to the left sidebar navigation tree. A callout box explains: "Choose from standard tree or see the next page for unique 'Dimensions' – build your own viewing tree. In the standard tree also add and remove documents and folders from your Favorites".
- DOCUMENT PANEL:** Points to the document list table. A callout box explains: "Choose how to see your documents, and save your settings with column picks, Document Views, filters and more".
- WIDGETS PANEL:** Points to the right sidebar information panels (General, Locations, Content and renditions). A callout box explains: "Extensible panel showing widgets – choose from core set (e.g. properties, renditions) or create your own linking in any web services e.g. database view, portlets. Rearrange with drag & drop".

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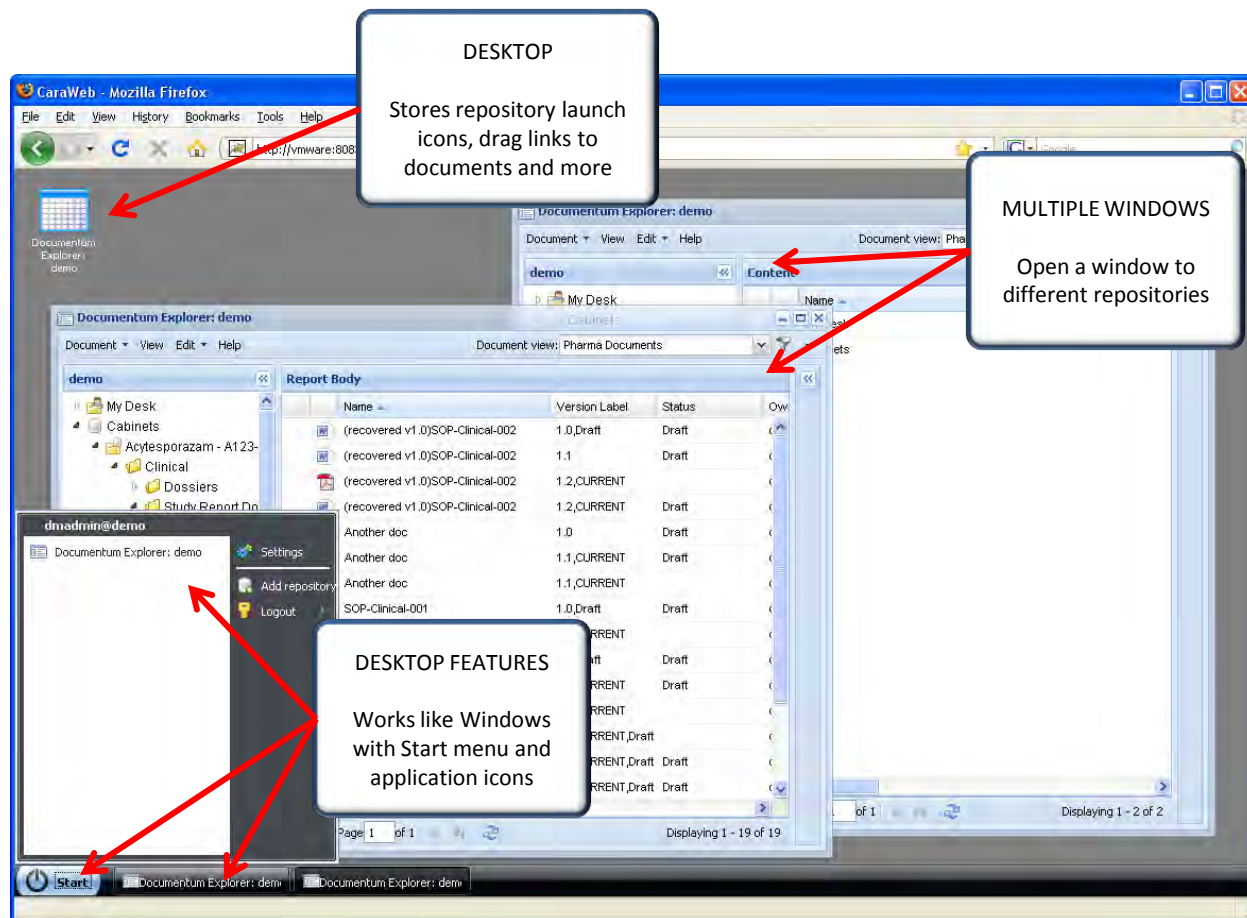
Dimensions and other "Web Desktop" features

CARA v3 has a unique ability to allow users to build their own tree view ("Dimensions"). The single browser window also allows users to open more than one "Repository Explorer" window within the main window, using a desktop-like Start Menu and window management



DIMENSIONS

Create your own tree of virtual folders with up to 5 levels of how you want to see the documents



DESKTOP

Stores repository launch icons, drag links to documents and more

MULTIPLE WINDOWS

Open a window to different repositories

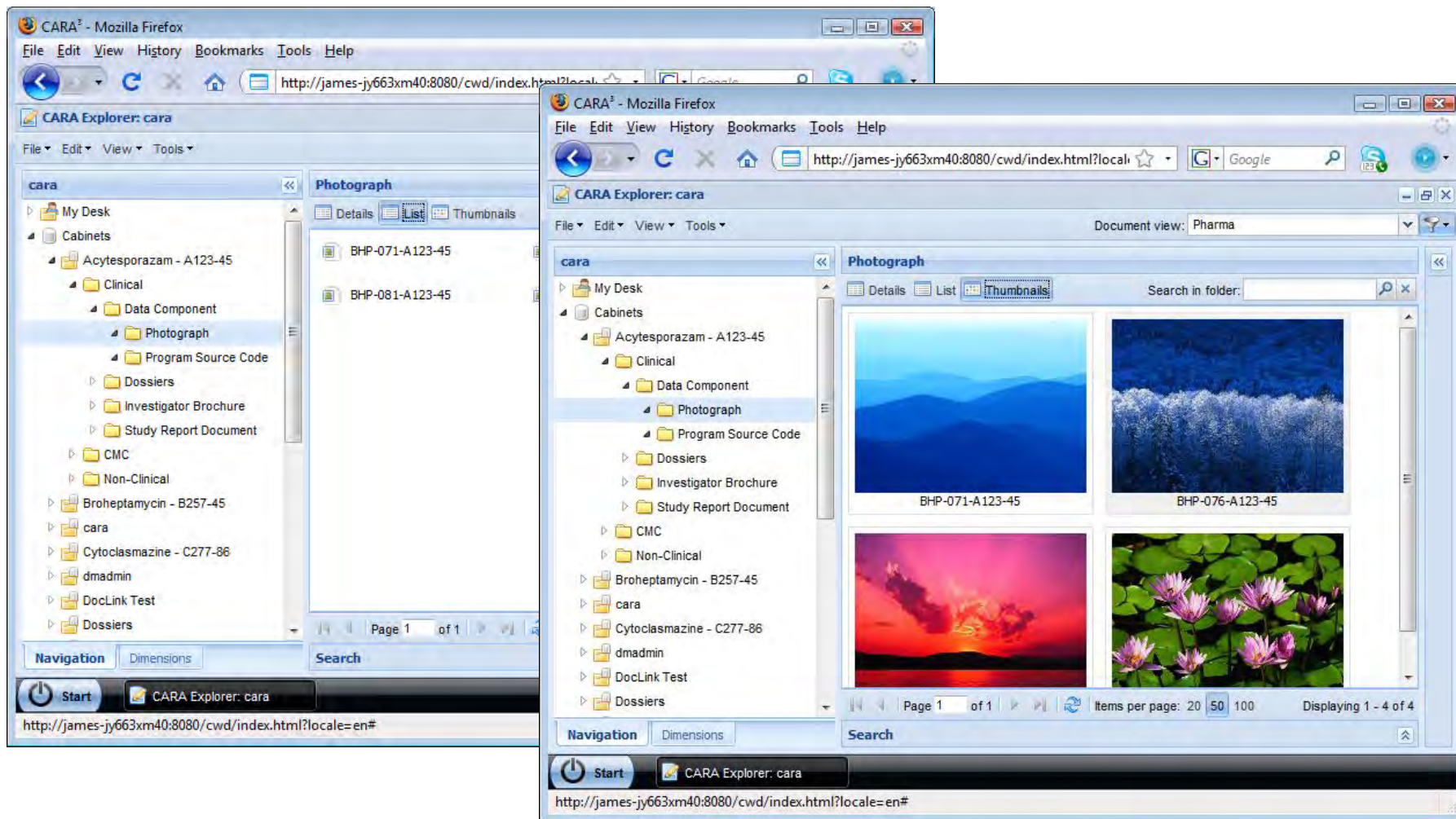
DESKTOP FEATURES

Works like Windows with Start menu and application icons

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Thumbnails and Listview

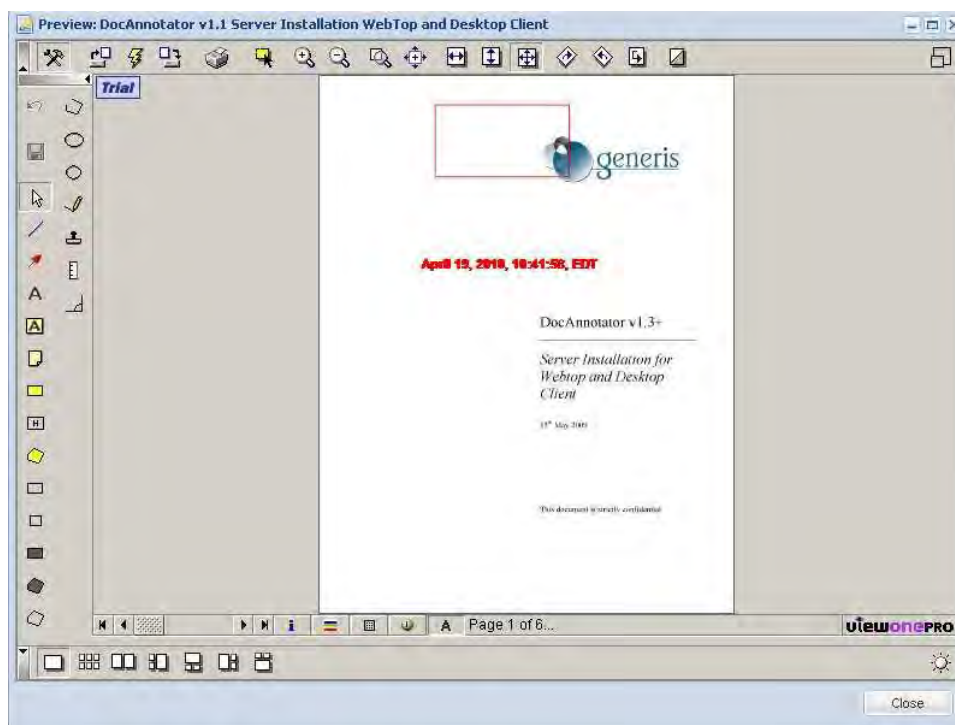
For managing data that is rich media (images, video) it is possible to display the document pane in listview or thumbnails mode:



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Universal Document Viewing through ViewOne Pro from Daeja

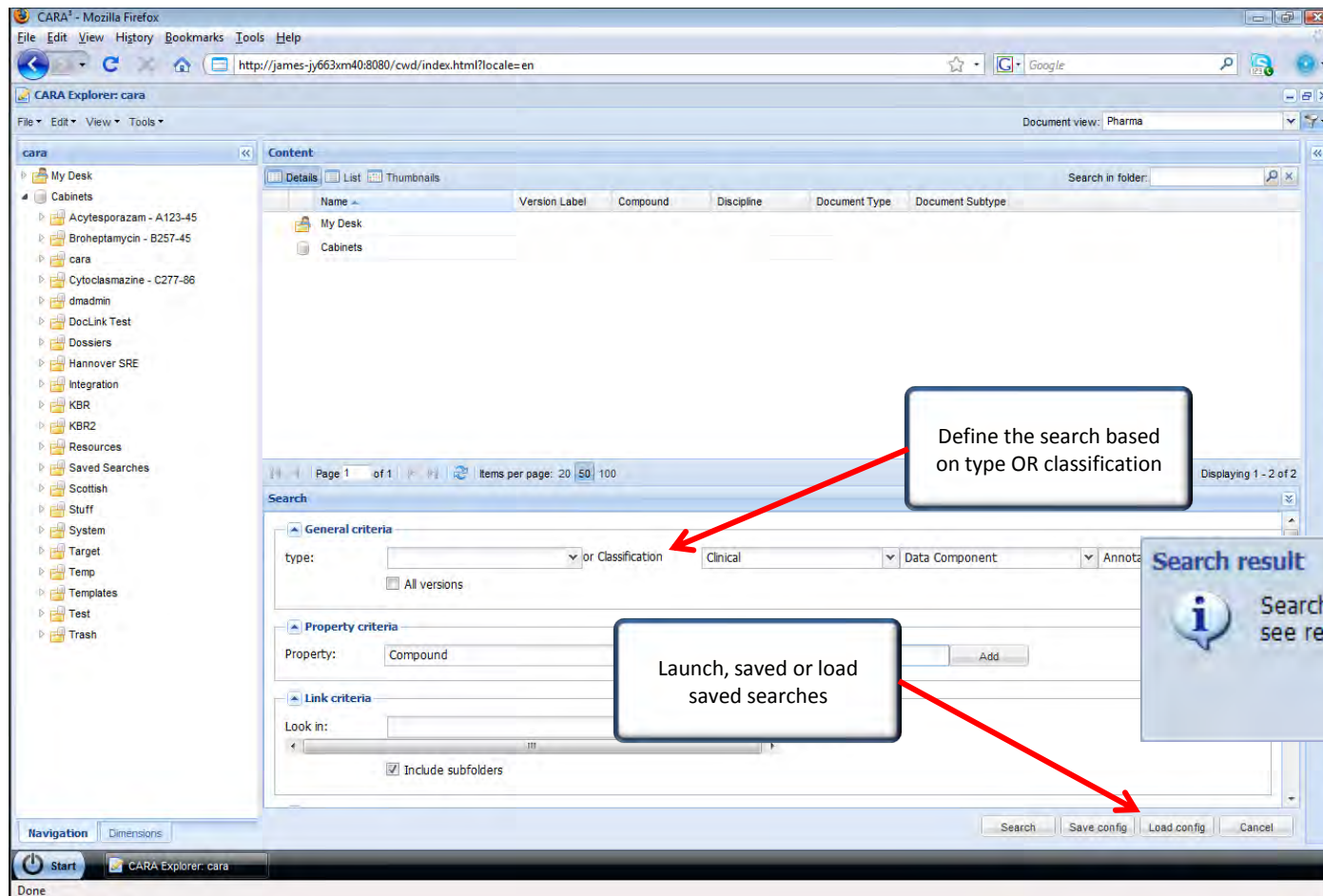
Generis has implemented state of the art technology from Daeja (www.daeja.com) for viewing 300+ formats in a common viewer (no local installation required). The ViewOne Pro product allows annotations, watermarking and streaming of content as well as redaction:



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Search – including asynchronous and based on classification

CARA³ has a search definition pane that allows searches to be defined based on type or on the Classification hierarchy. Running a search which will yield a long list of results? The search pane runs independently allowing you to continue doing other work, and notifies you when the results are ready.



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Runs on:

- Internet Explorer
- Firefox
- Opera
- Safari
- Google Chrome

LOGIN

Login to repositories
and add them to your
Web Desktop

- Fast Performance - High Ergonomics - - Extended Functionality -

The following is a list of features offered through CARA:

- Quick, ergonomic and intuitive front end that runs in a browser but works like a standard Desktop application (right-click menus, drag & drop, and other such features)
- Provides multiple views of documents: Docbase, Structure (Virtual Document) and My-Desk including Tasks and Favorites.
- Displays supporting information in Widgets Pane: Locations, Related Documents, Renditions, Tasks and Versions or any other widgets you build to include.
- Integrates MS Office and Adobe directly within the application.
- Displays document content and attributes with a single mouse click.
- Filters information based on user-defined criteria – enables different, user-specific views of information.
- Leverages core Documentum functionality like version control, security and audit trail.
- CARA Structure expands functionality and improves usability of virtual documents.
- Summary and reporting views of workflows, status, searches across multiple documents, with Export to Excel feature
- Integrates with Generis's other Documentum modules such as DocAnnotator (annotations), DocConfigurator (docbase configuration) and DocSecure (watermarking, eSignature and controlled printing).

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R³porter

Create, save and run any reports using DQL or the Search, with ability to export the results to Excel and even create and export / print graphs. Queries can be saved to the Dashboard which shows tabular or graphical results:

The screenshot displays the R3porter application interface. It features a 'Query' section with a DQL editor containing the following query:

```
select authors,count(*) from pharma_document where any authors is not null group by
```

Below the query editor is a 'Result' section showing a table with 7 rows:

Authors	Count(*)
1	221
2 The President,James Kelleher	20
3 Mickey Mouse	3
4 James Kelleher	18
5 Superman	20

The interface also includes a 'Dashboard' section with three panels:

- Authors:** A bar chart showing the count of authors for each entry. The y-axis ranges from 0 to 240. The x-axis labels are: 'nt,James Kelleher', 'Mickey Mouse', 'James Kelleher', 'Superman', 'The President', and 'Lee Anne Fischl'. The chart type is 'Sketch Bar'.
- Tasks by person:** A table showing task recipients and their counts:

Task recipient	Count(*)
1 dmadmin	9
2 test1	9
3 testgroup2 : Any	2
4 test2	3
5 test3	3
6 testgroup1 : Any	1
7 User Test 2	2
8	21

- Status of stuff:** A pie chart showing the distribution of 'Approved' status. The chart is partially visible, with a green slice labeled 'Approved'.

A 'Close' button is located at the bottom right of the dashboard window.

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Manage views

Create and modify Views, Dimensions, Properties and Filters:

Edit view: Pharma (General tab)

View name *: Pharma
 Type *: Document (pharma_document)

Attribute	Alignment	Width	Visible?
<input type="checkbox"/> object_name	left	200	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Version Label	left	100	<input checked="" type="checkbox"/>
<input type="checkbox"/> compound	center	100	<input checked="" type="checkbox"/>
<input type="checkbox"/> discipline	center	100	<input checked="" type="checkbox"/>
<input type="checkbox"/> document_type	center	100	<input checked="" type="checkbox"/>
<input type="checkbox"/> document_subtype	center	100	<input checked="" type="checkbox"/>

Sort column *: object_name
 Sort direction *: Ascending
 Page size *: 20

Edit view: Pharma (Filters tab)

Name	Condition	Enabled?
<input checked="" type="checkbox"/> Only CURRENT	any r_version_label='CURRENT'	<input checked="" type="checkbox"/>
<input type="checkbox"/> Draft	a_status='Draft'	<input type="checkbox"/>
<input type="checkbox"/> In Progress	a_status='In Progress'	<input type="checkbox"/>
<input type="checkbox"/> Approved	a_status='Approved'	<input type="checkbox"/>
<input type="checkbox"/> My documents	owner_name=USER	<input type="checkbox"/>
<input type="checkbox"/> Test	1=1	<input type="checkbox"/>

Edit view: Pharma (Properties tab)

Properties attributes:

- ACL Domain
- ACL Name
- Accessed
- Alias Set
- Application Type
- Archive
- Aspect Name
- Assembled From
- Authors
- Category
- Component Version
- Composite IDs
- Composite Version
- Compound Architecture
- Content File Count
- Controlling Application
- Created
- Creator Name
- Current State
- Document Date
- Effective Date
- Effective Flag
- Effective Label
- Name
- Subject
- Version Label
- Discipline
- Document Type
- Document Subtype
- Compound
- Formulation

Edit view: Pharma (Dimensions tab)

Level	Value
Level 1:	Authors
Level 2:	Status
Level 3:	Subject
Level 4:	ACL Name
Level 5:	

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Status Manager

Report on status across multiple document(s) / folder(s), including ability to multiple promote / demote and export to Excel:

The screenshot displays the 'Status manager' interface with a table of documents. The table is grouped by status into 'Approved' and 'Draft' sections. A red arrow points from a callout box 'Grouped by status' to the 'Status: Approved' header. Another red arrow points from a callout box 'Modify the columns to be shown' to the 'Edit view: Pharma' dialog, which shows a table of columns to be displayed.

Name	Status	Modified	Modified By
Status: Approved			
DocSecure Test	Approved	7/3/09 11:14 AM	dmadmin
SOP-Clinical-007	Approved	8/10/09 3:29 PM	dmadmin
SOP-Clinical-010	Approved	8/10/09 3:30 PM	dmadmin
Status: Draft			
Another doc		2/26/09 2:29 PM	
Department	Draft	2/25/09 12:18 PM	
Generis presentation 2009	Draft	2/25/09 12:18 PM	
SOP-Clinical-003	Draft	2/26/09 11:58 PM	
SOP-Clinical-003	Draft	2/26/09 11:58 PM	
SOP-Clinical-003	Draft	2/26/09 11:58 PM	
SOP-Clinical-003	Draft	2/26/09 11:58 PM	

Attribute	Alignment	Width	Visible?
<input type="checkbox"/> object_name	left	100	<input checked="" type="checkbox"/>
<input type="checkbox"/> a_status	left	100	<input checked="" type="checkbox"/>
<input type="checkbox"/> r_modify_date	left	100	<input checked="" type="checkbox"/>
<input type="checkbox"/> r_modifier	left	100	<input checked="" type="checkbox"/>

**Contact us for a demo
or free evaluation**

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