

Business Requirements

BR#:

1. Document management system to ensure reduced time and effort in document-driven processes, greater productivity and lower probability of document loss or corruption.

Businesses look for the following key features.

- a) Simplicity
 - It should be user-friendly and provide access to the required documents in a few clicks.
 - b) Mobility
 - It should be available at any device: PC, tablets, mobile phones
 - c) Scalability
 - It should be able to grow together with a company.
 - d) Flexibility
 - It should be customizable and integrate with other corporate systems and tools.
 - e) Security
 - It should restrict access to sensitive documents and support regulatory compliance.
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2. Following Features of SharePoint Online Document Management System needs to scope for development.



[Note]: Out of above features Integration will not be part of scope of development

Storing#1:

1. Centralized storing of documents.
2. It should support multiple document types, including .PDF, .XLS, .DOC etc.

Capture & validation#2:

1. The short description of the meeting should be visible on the calendar and when tapped on the meeting, it should show the full name of the forum/meeting.

Indexing#3:

1. The DMS should be able to tag the documents.
2. The assigned tags enable facilitated categorizing, archiving, finding and retrieving documents.

Search#4:

1. DMS should enable document search by document titles and content.
2. The search should be configurable to show results depending on users' permissions.

Workflows#4:

1. Custom workflows should allow automating various document-related processes. For example, workflows should enable collecting approvals, feedback or signatures.
2. In addition, DMS should supports rules-based workflows. For example, an approval workflow will automatically guide a large-amount invoice thorough a bigger number of approvers as compared to a small-amount invoice.

Real-time collaboration#5:

1. A document management system allows users to work on the same document simultaneously.
2. In a real-time collaboration mode, DMS should tracks time of access to the document by users and marks modifications made by co-authors in different colors.

Versioning#6:

1. Document management system should allows keeping track of document versions.
2. It should enable restoring a previous version if needed.

Security#7:

1. DMS should have access control based on user permission levels. These levels range from only viewing a document to full control (a user can create, upload, modify, delete, and share documents).
2. DMS should also provide multi-factor authentication, backups, automatic anti-malware protection and generates alerts when a user is about to share sensitive information. Also, the DMS should enable document encryption at rest and in transit.

Compliance#8:

1. To help businesses to adhere to compliance regulations (e.g., HIPAA, GLBA, SOX, GDPR), DMS should supports the audit trail.
2. The audit trail should allow tracking all document-related activities performed by users: creation, accessing, modification, sharing, deleting.
3. DMS should also supports document retention and deletion policies.
4. It should schedule automatic elimination of unnecessary files after a certain period, for example, after 6 years as required by HIPAA regulations.

Integration#9:

Should be capable for integration with other application for future requirement.