PROTOCOL!

Case Management
System

josh
PROTOCOL!

The Legally Compliant Case Management System

josh Protocol! is the revolutionary scalable Case Management system suited to the needs of large and small administrations.

What is josh Protocol!

With the term case management system we refer to the set of calculation resources, the equipment, the communication networks and the computer procedures used by the PA for document management. In addition to this definition, the reference norm (Italian Presidential Decree 445/2000) gives specific indications regarding whether or not a Case Management system is valid, in particular based on 4 possible levels of creation:

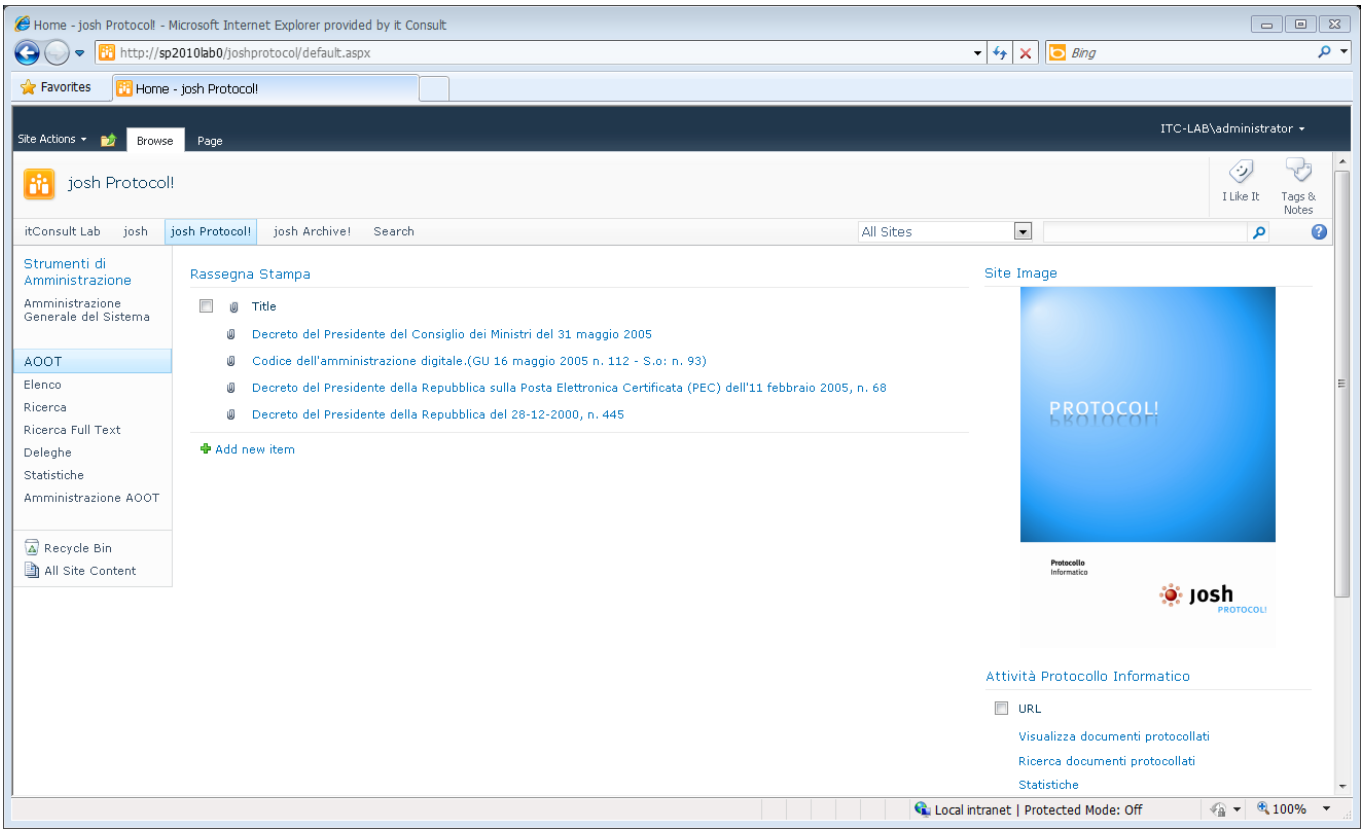
- Minimum Nucleus
- Document Management
- Document WorkFlow
- BPR “Business Process Reengineering”

josh Protocol! is natively integrated with **Microsoft SharePoint** technology and with the **it** Consult **josh** platform; it covers **4 levels of the DigitPA standard (ex Cnipa),** the Italian agency which sets the standards of all the Public Administration (PA), and its place within the system is that of a fundamental technological solution for starting up - in reality - the modernization process of the PA.

Not merely a Records Management system, but a global software platform for Knowledge Management in the PA

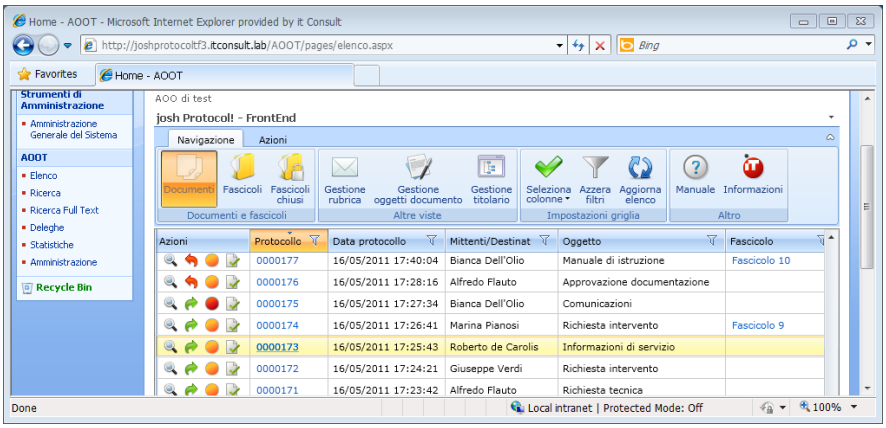
Who does it target?

josh Protocol! has been developed based on the indications given by DigitPA (ex Cnipa) for the adoption of a Case Management system by the **PAs.** Despite this, it is also suited to the needs of private companies that use **josh Protocol!** to introduce the right rigor and method into their organization for correct management of document flows.



The reliable, practical and simple tool for the PA

josh Protocol! does not require radical changes in work habits: the platform easily adapts to the PA's work methods and organization



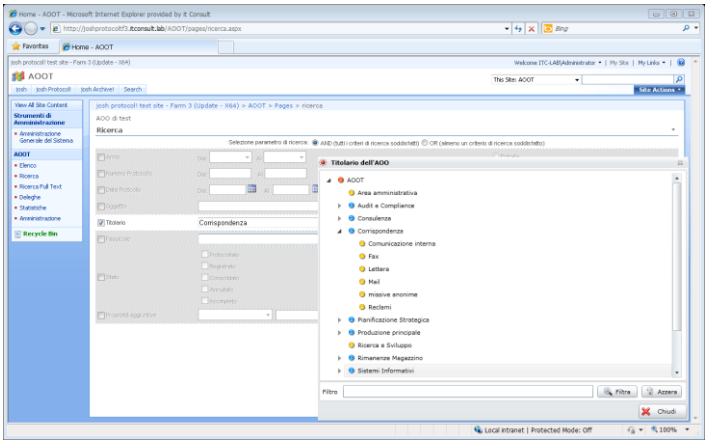
Optimised management of system users

josh Protocol! supports and natively integrates Active Directory, thus simplifying the management of accesses to Microsoft SharePoint. The management of the **josh Protocol!** permissions finally makes it possible to completely control all of the actions which can be made by the various users on a single document. **josh Protocol!** also makes an activities register available that traces all of the actions by the various users on recorded documents.

The filing plan, manageable on several levels and historizable, fully meets the needs of document classification

Recording incoming/outgoing documents

josh Protocol! allows the recording of incoming/outdoing paper and electronic documents, using a variety of methods: from a dedicated station, via web, via Outlook. The paper documents are recorded using the **josh Scanner** tool (integrated into the platform) which allows the acquisition of the document in electronic format, after it has been "registered and stamped" with a bar code and a label has been affixed to the document itself. The system can also monitor a Certified Electronic Mailbox (an e-mail system that in Italy has the same legal value of the certified mail) by actually integrating the document recording procedure into the normal e-mail system.



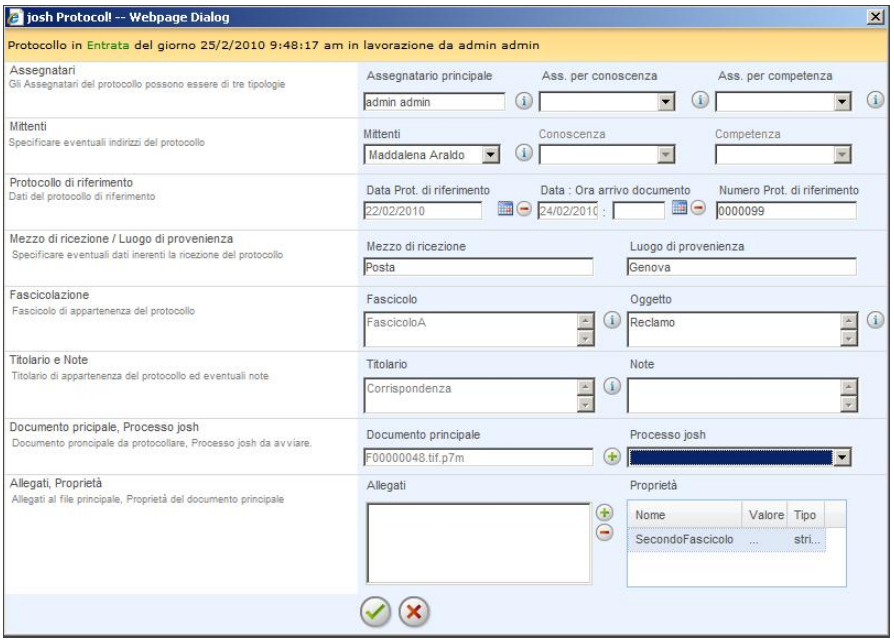
The System can search for information directly within the content of the document as well as in the metadata or personalized properties

Search service

Advanced search functions carried out on identifier fields of the documents allow them to be immediately found. Using the powerful Microsoft SharePoint full-text indexing service, **josh Protocol!** can carry out the search for the documents based on the content and directly display within the portal the data regarding the recorded documents, allowing the possibility of using even destructured information quickly and highly intuitively.

The power of innovative and exclusive functions

A set of powerful and innovative functions that allow the PA to go "beyond the call of duty" in terms of productivity and efficiency



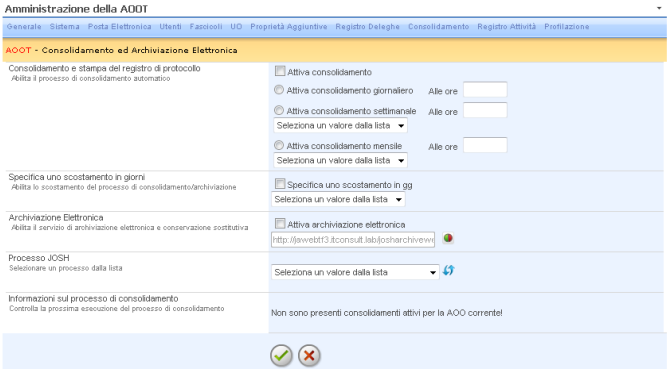
The displayer allows complete management of the display, printing, downloading rights for every single user on ever single document. Unique detail in a case management system!

Display and management of recorded document

josh Protocol! allows full respect of the requisites for privacy and protection of the public documents collection. Given the flexibility of the authorization policies, the Registering user decides which users/groups have access to the document and how (display only, saving to a local machine, printing of one copy of the document, forwarding via mail). **josh Protocol!** also offers the possibility of displaying the document properties, the dossier it belongs in and its relation to other documents and/or dossiers present, as well as information on the digital signature, if present.

Management of the consolidation procedure

A simple interface shows the complete list of the records registry which can then be exported and digitally signed in compliance with the laws and regulations in force. Consolidation may by either **programmed** or **manual** and, if desired, may be a prelude to the successive phase of Substitutive Conservation of the recorded documents.



Documents and Processes are integrated with each other as is the case in the reality of the Public Administration

Automatic start-up of the processes

josh Protocol! allows the start-up of a process/workflow upon recording: therefore not only the recorded document is made available for consultation by the authorized users, but the system automatically sends the **josh** process tasks to be performed to those involved. Similarly, the recording interface can be enabled during the execution of a process.

New tools for a modern and efficient PA

josh Protocol!, technological excellence and completely original functional components

The josh Protocol! components

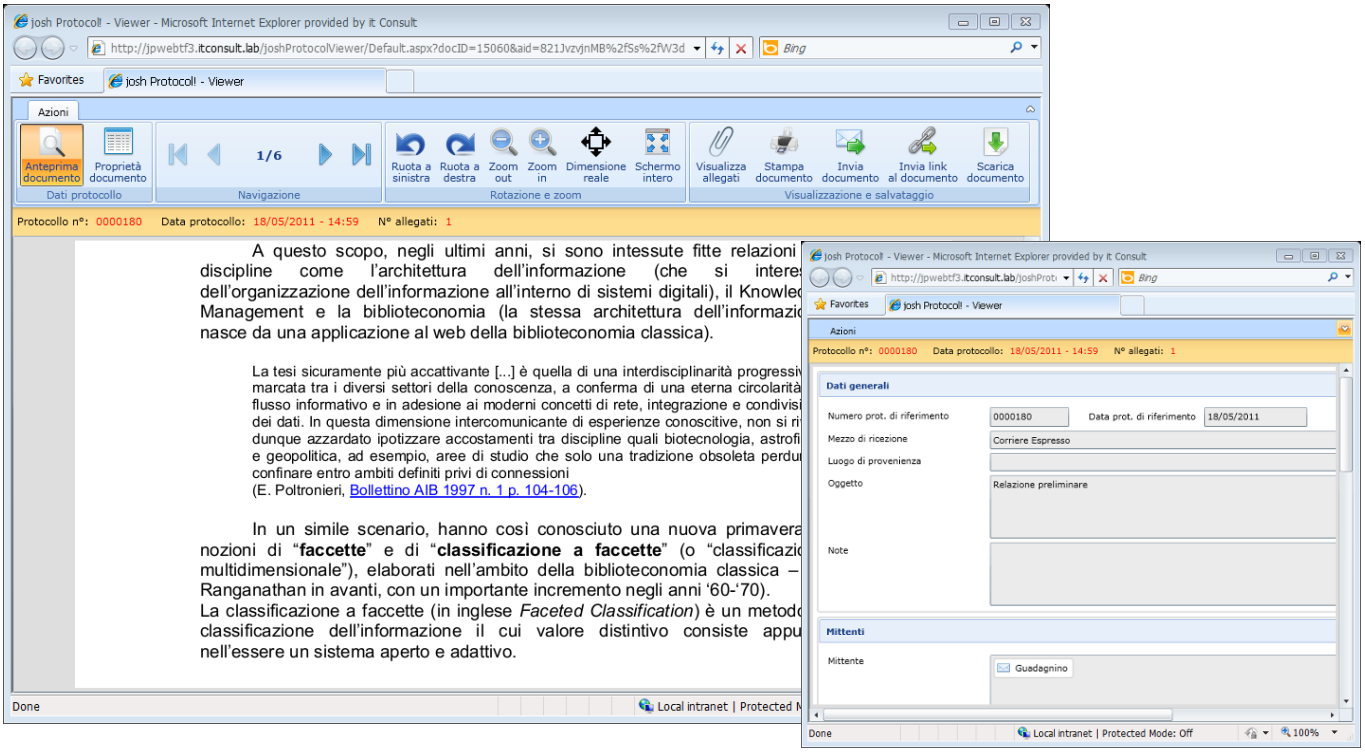
The functions of the platform are contained in three main sub-systems:

josh Protocol! WebAdmin – Component integrated in Microsoft SharePoint allows the easy and simple management of the entire Case Management environment and of the single department, Homogenous Organizational Area in the josh Protocol! terminology . From WebAdmin the main parameters of the application can be set, the records registry and the consolidation activities can be managed. It is also possible to administrate the Homogeneous Organizational Areas, the Organizational Units (OU) of the entire structure as well as the Users, with the possibility of also monitoring their permissions on a document management level (role assigning).

josh Protocol! FrontEnd – Groups the search functions and the activities related to document management. Completely integrated with Microsoft SharePoint, it is the part of FrontEnd that allows secure, easy and intuitive action on the document and allows complete management and control of the Case Management activities by the user whose role has been enabled. The user in charge of records management has a complete view of the assigned documents in the recording phase.

josh Protocol! brings together the best of the technological and functional features required of a Records Management system by the PA

josh Protocol! Viewer – The web displayer allows complete management on a server level of the display of the documents present in the system. Great attention has been given to the management of the permissions assigned to the users: the distinctive characteristic of this component lies in the possibility of authorizing and tracing the single operations on the documents, namely printing, saving locally, forwarding via mail and, naturally, the simple viewing of the document.



Substitutive Conservation of the recorded documents

josh Protocol! goes well beyond the functions of a "normal" records management system; it also guarantees Substitutive Conservation of the recorded documents

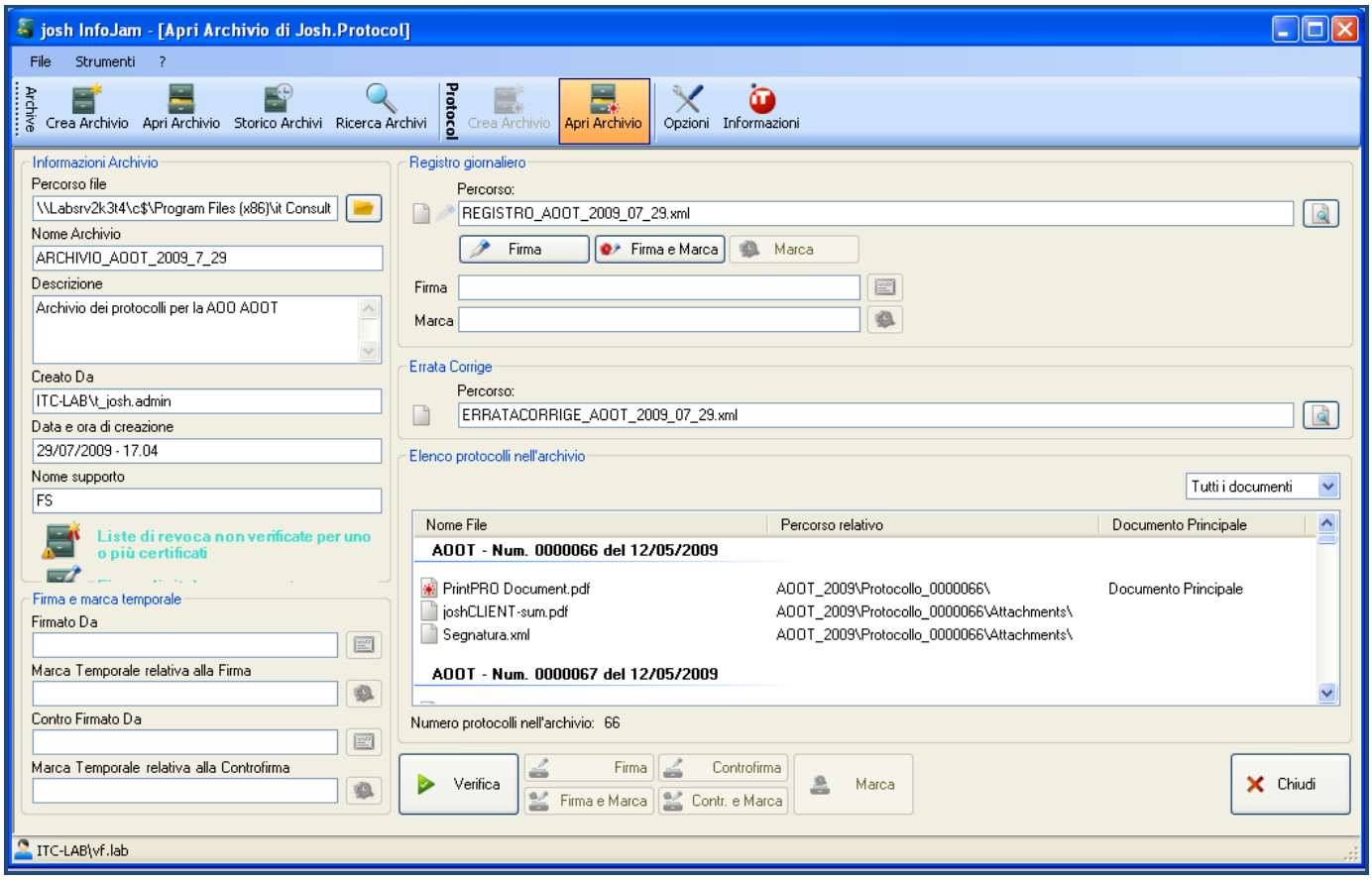
InfoJam!, the tool for Substitutive Conservation

In order to fully complying with the laws and regulations in force, **josh Protocol!** adopts an integrated approach to the management of documents which is the fruit of **it** Consult experience in the field of Document, WorkFlow and Knowledge Management. The platform introduces a set of absolutely innovative functions, including the Substitutive Conservation module, able to make the work of the PA more up-to-date and modern.

For Substitutive Conservation we intend the process which makes it possible to conserve documents solely digitally so that they do not deteriorate and will be available over time in their integrity and authenticity.

josh Protocol! allows the Substitutive Conservation of the documents recorded in compliance with the indications provided in Cnipa Resolution no. 11, February 19, 2004: Explicative notes on the technical rules for the reproduction and conservation of documents on optic support.

Using the **InfoJam** tool, part of the platform, it is possible to affix a digital signature and time stamp on the recorded documents archive automatically created upon the generation of the records registry. The affixing of Digital Signature and Time Stamp on the recorded documents to be conserved is the concluding action of the Substitutive Conservation process after which it is finally possible to proceed with the real dematerialization of the documents: the electronic documents produced by the **InfoJam** tool possess the guarantee characteristics required by the norm and are therefore conserved in a substitutive manner for all rights and purposes.



Regulatory and Technological Compliance

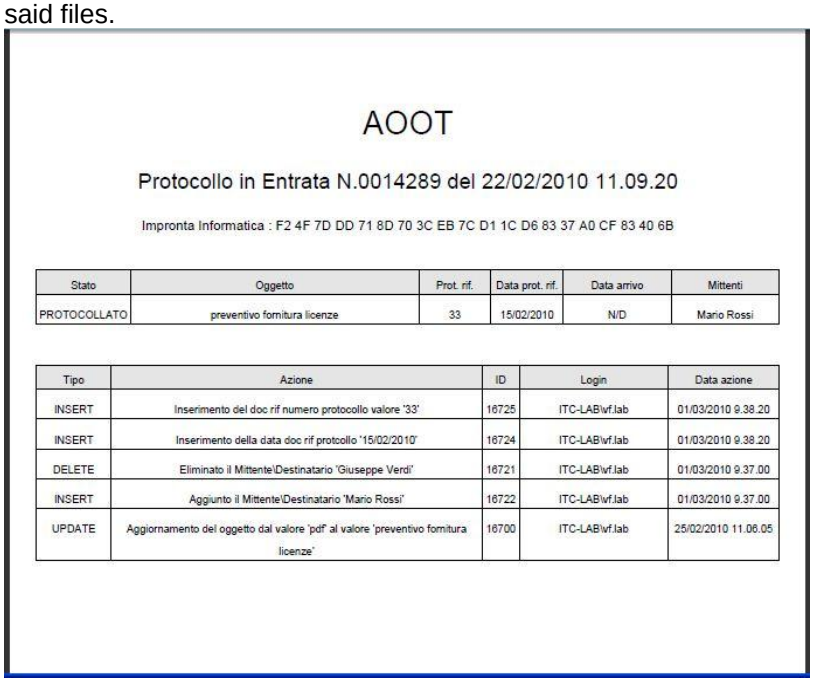
The software platform is completely based on regulatory and market standards for a secure investment guaranteed over time

Uniformity with the cryptographic standards of the Cnipa Regulations

josh Protocol! supports electronic signature tools for signing and management of electronic documents fully conformant with the DPCM October 31, 2000 and subsequent modifications. The envelope is a structure with the following characteristics:

- it is coded in the ASN.1-DER or BASE64 format;
- the name of the signed file (equivalent to the envelope) has the extension “p7m”;
- the envelope contains the digital signature and the certificate issued by the certifying authority which also contains the public key.

josh Protocol! includes an **iFilter p7m** which makes it possible to index said files.



AOOT

Protocollo in Entrata N.0014289 del 22/02/2010 11.09.20

Impronta Informatica : F2 4F 7D DD 71 8D 70 3C EB 7C D1 1C D6 83 37 A0 CF 83 40 6B

Stato	Oggetto	Prot. rif.	Data prot. rif.	Data arrivo	Mittenti
PROTOCOLLATO	preventivo fornitura licenze	33	15/02/2010	N/D	Mario Rossi

Tipo	Azione	ID	Login	Data azione
INSERT	Inserimento del doc rif numero protocollo valore '33'	16725	ITC-LAB\wf.lab	01/03/2010 9.38.20
INSERT	Inserimento della data doc rif protcollo '15/02/2010'	16724	ITC-LAB\wf.lab	01/03/2010 9.38.20
DELETE	Eliminato il Mittente\Destinatario 'Giuseppe Verdi'	16721	ITC-LAB\wf.lab	01/03/2010 9.37.00
INSERT	Aggiunto il Mittente\Destinatario 'Mario Rossi'	16722	ITC-LAB\wf.lab	01/03/2010 9.37.00
UPDATE	Aggiornamento del oggetto dal valore 'pdf' al valore 'preventivo fornitura licenze'	16700	ITC-LAB\wf.lab	25/02/2010 11.06.05

josh Protocol! supports the new document format based on the OpenXML Document specs, in addition to the most widely used document formats: pdf, doc, docx, tiff, jpeg, xps, etc.

System requirements

Server

- A Windows 2003-2008 and ActiveDirectory based server system
- Microsoft SharePoint 2010 (or Windows SharePoint Foundation 2010 + Search Server 2010 Express) or Microsoft Office SharePoint Server 2007 (or SharePoint Services 3.0 + Search Server 2008 Express)
- Microsoft SQL Server 2005/2008 (the use of SharePoint 2010 implies SQL Server 2005/2008 x64)
- an e-mail system (for example Microsoft Exchange Server 2007)

Client

- a Microsoft Windows (Windows 7, Vista, XP) based personal computer
- Internet Explorer 7 or later

Optional requirements

Server

- Additional filers (iFilter) for full-text indexing (in particular those released by Adobe, Captaris, Foxit)

Client

- Microsoft Office System
- Scanner with TWAIN or ISIS driver
- SmartCard reader
- Barcode printer

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