

# Software Product Description

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PRODUCT NAME: COMPAQ WORK EXPEDITOR V1.2

SPD 70.20.01

## PRODUCT DESCRIPTION

Compaq Work Expeditor is a collaborative solution for the management of work, documents and data, as it move through an organization from inception to completion. It uses Microsoft Exchange as the communications infrastructure, SQL server to tightly control data, and Microsoft Outlook as the common user interface. Expeditor integrates document collaboration, workflow, data/forms management and flexible programming capabilities in a single product. It helps businesses increase productivity and flexibility by managing document-intensive work and securely maximizing information flow.

Work Expeditor is implemented as a dedicated information service that can be activated on Outlook desktops. All folders and items that are controlled by this new service behave in the same way as in any other folder. For instance they can be created and manipulated in the same way, including the support for drag and drop operations. The difference is in their support for business related functions. Just as the Exchange Mail service provides the functions that are needed for efficient communication, the Expeditor service supports the functions that are needed to control business processes, including the associated data.

A good candidate for a Work Expeditor implementation is the registration and handling of all formal incoming and outgoing correspondence. In such an implementation Work Expeditor ensures the execution of all procedures, including the collection of approvals. Work Expeditor also provides secure storage and archiving, including a security mechanism that guarantees that only qualified people have access to the business information. Another important feature of Work Expeditor is the provision of facilities that ensure that every piece of information can be traced and tracked.

The management of case files in the public sector, or patient files in a hospital are other good examples of Work Expeditor implementations.

When users plan to use folders for the storage and handling of business files, they will require additional features that are not covered by the standard functions

that are provided by the operating system or the mail and messaging infrastructure. A good example of such a requirement is the need for an access control mechanism that is implemented down to the level of individual documents and attributes. Access control should be based on the role and position of users within the organizational hierarchy, ensuring the maintainability of security definitions in large and complex organizations. Another typical requirement is a process control mechanism that provides "just-in-time" availability and access to the right information by the right person at the right moment and under the right conditions. And because business files, by definition, are closely related to the business-specific identity of the organization, the ultimate solution must be adaptable to the ever-changing needs of the enterprise.

Work Expeditor covers all these requirements. It offers Document Management technologies, Workflow technologies and Solution Deployment facilities in a single product.

The three main components of Work Expeditor are:

1. A new Folder service dedicated to the Management and Control of Electronic Business Files and Items.
2. A Workgroup Administration Tool to define the structure and details of the Workgroup Environment.
3. A Solution Development Workbench to define the structure and details of the Business Files and Procedures.

## FEATURES & FUNCTIONS

Work Expeditor features can be classified as follows:

- Basic folder functions
- Specific Security Control functions
- Specific Data Control functions
- Specific Process Control functions
- System Administration facilities
- Solution Building facilities

### Basic Folder Functions

Work Expeditor is enabled on Outlook client systems by adding the Expeditor Work Folder service to the list of available services. The Outlook folder-tree is expanded with a new folder group: Work Expeditor. Expeditor Work Folders can be created in the same way as any other folder. Standard items in an Exchange environment, such as documents, forms and mail-messages, can be moved or copied to an Expeditor Work Folder and vice versa. This can be done in the regular way using the copy functions or drag & drop. Once standard items are stored in the Work Folder, they are automatically upgraded to "Expeditor Work Items". Work Items are standard items that are aware of the business process they participate in. Expeditor-specific functions, such as the attachment of a workflow design, can only be activated for Work Items. As soon as Work items are moved outside the work folder they are automatically "downgraded" to standard items and lose their connection with the Work Expeditor-specific functions.

In the Expeditor Work Folder environment there are some pre-defined (system-controlled) folders such as a Deleted Items folder, an Incoming Work folder and a Completed Work folder. These folders help the end-user manage his "work-in-progress" in a "collaborative" Work Management environment. In this environment the Exchange mailbox folders are used for enterprise-wide communication, public folders are used for enterprise-wide publication, personal folders support the individual efficiency and the Expeditor Work Folders manage the work-in-progress in one or more business processes.

### Security Control

Because Expeditor Work Items are enabled to participate in business processes, the basic security that is provided by the operating system and the mail infrastructure is not sufficient. The access control mechanism should be able to interpret the business context of the information. It should be based on the roles and positions of individuals relative to their manager and/or subordinates. Basic actions like "read" or "write" should be broken down further to include typical administrative actions such as "copy" and "share".

Expeditor Security Control has the following characteristics:

- An Access Control List Editor is available for the definition of business-oriented Access Profiles. The definitions are based on the organizational model and can contain process-related dependencies.

- The Access Control functions are active for all users, including developers using the programmable interfaces.
- Access Control can be defined at the most detailed level that is a Document or Form or even a single attribute.
- Access can be defined at the most detailed level of activities, including "copy", "share", "find" and "sign".

### Data Control

Expeditor Work Folders can be used to store any item that can be used in Outlook, such as Folders, Office Documents, Mail Messages and Outlook Forms. Once they are stored in an Expeditor Work Folder, the following additional Data Control functions are supported:

- Version Management  
Multiple, separate versions of each individual item can be stored in Work Expeditor. When two or more people collaborate on a single document, the system creates a version automatically each time a different person modifies the document. Versions can be imported and exported for use off-line.
- Electronic Approvals  
Electronic Approvals can be put on any item. They can be used to change the status of a document, for instance to "sign-off", and as workflow conditions.
- Custom Properties and Behavior  
Every item, even folders, can be extended with custom properties. These properties can be used to hold business-specific information. It is also possible to define the initial contents and the nesting structure of work folders.
- History Logging and Reporting  
Every action that is performed on a Work Item is written to a transaction log file. The information in this transaction log can be used to produce History Reports at Work Item level on-demand.
- Served-based control  
Expeditor Work Items are permanently under control of the Work Expeditor server software. The Expeditor server takes care of the automatic registration of safety copies, independent of the capabilities of the editor that is used. It also takes care of the recovery of the user data after any unexpected breakdown of the desktop client.

Process Control

Workflow definitions can be attached to all folders, documents and forms that are stored under the control of Work Expeditor. The workflow definition, which is designed using a graphical designer, controls the movement of the information from one user to another under the right conditions. Work can also be distributed by end-users in a more ad-hoc and dynamic way. In all cases the progress of the work through the process is fully traceable.

The following features are supported:

- General
  - All items, including complete folders, can be routed
  - Roles can be used as destinations
  - Deadlines can be set
  - Notification of “new work” is done through the Exchange Inbox
  - Overview of the actual status and process history can be reported on-demand
- System Controlled Routing
  - Graphical workflow designer
  - Pre- and post-conditions can be evaluated
  - Support for fan-out and joins
- Manual Routing
  - “sharing” on demand with individual users
  - “forwarding” to individual users
  - ad-hoc change of pre-defined workflows “in progress”
- Programmability
  - Expeditor Workflow is fully programmable using the Expeditor Automation Server.

System Administration facilities

The business functions of Work Expeditor require the presence of detailed information about the organizational structure. Detailed information regarding the organizational model and the business roles within the workgroups cannot be found in a standard Exchange/Outlook environment. Work Expeditor offers an Administration tool that allows workgroup administrators to define and maintain the organization structure they are responsible for. The User definition is an extension of the Exchange user administration.

Only users that are present in the Exchange global address list can be registered as Work Expeditor users.

The administration tool also contains a section that allows system managers to configure the Work Expeditor system in line with their system requirements.

The following specific features are offered:

- A Collaboration Structure Editor to define:
  - The organizational hierarchy
  - The business roles
  - The business rules
- A System Environment Editor to define:
  - The actual mapping of the physical business data on one or more databases on one or more servers

Solution Building facilities

Work Expeditor is based on object-oriented technology, which allows it to be used as a central framework for enterprise-specific solutions in which document-based business processes are managed. Generic functions, such as the basic document management and workflow capabilities, are offered as out-of-the-box features. These functions can be tailored to individual needs using a set of graphical configuration utilities. Only the very specific functions need to be developed using standard Microsoft tools, such as Visual Basic for Applications. This development process can now be done in a strictly modular way. The Work Expeditor framework offers central management and control of both the standard functions and the customized modules. Such a concept would be hard to implement in a “Microsoft Tools Only” scenario. Another important advantage is the capability of Work Expeditor to package all elements of a specific solution into a single Expeditor Software Component. The customized functions and the VBA-extended document templates can be easily transported from development to production systems using a medium of choice, such as the Exchange infrastructure or the Web.

Because the Work Expeditor folder data is kept in a standard, MAPI-compliant message store, all items and their properties can be accessed through the normal standard interfaces, the most important one being CDO. Programmable access to Work Expeditor-specific functions is available through an Automation Server that gives access to a superset of functionality in a CDO-like manner.

The following features are offered:

- Component Manager to define the atomic components of a solution:
  - Custom properties, including validation rules.
  - Icons and mini-icons.
  - Strings and Messages, including support for multi-lingual solutions.
  - Basic access control mechanisms.
  - Basic workflow modes.
- Class Editor for the definition of Work Items:
  - Class Tree building.
  - Property assignments.
  - Workflow mode assignments.
  - Initial contents and nesting of work folders.
- Solution Distribution Facility
  - Automatic replication of a new version of a Software Component from server to all connected client systems.
  - Eventual Software Component version conflicts are evaluated at installation time.
  - Software Components can be protected against unwanted local modifications.
- Automation Server
  - Extension of the CDO and Outlook Object Model.
  - Access to Work Expeditor specific functions and options.

## SUPPORTED PLATFORMS

### Client (Intel only):

- Windows 95 with Outlook 98 and Office 95/97.
- Windows 98, with Outlook 98 and Office 95/97 or with Outlook 2000 and Office 2000.
- Windows NT WS 4.0 with Outlook 98 and Office 95/97 or with Outlook 2000 and Office 2000.

### Server (Intel and Alpha):

- Windows NT 4.0 with SQL Server 6.5 or SQL Server 7.0

Work Expeditor is certified for the Microsoft BackOffice Logo (both Server and Client).

Work Expeditor supports the Windows NT clustering services, including automatic fail-over.

## ADDITIONAL SOFTWARE REQUIREMENTS

**Client:** Microsoft Outlook, Microsoft Office

**Server:** Exchange Server (5.0 or 5.5), SQL Server (6.5 or 7.0 standard edition). The clustering services will only be supported with SQL Server 7.0 enterprise edition.

Work Expeditor and Microsoft Exchange do not have to be installed on the same server.

To support automatic fail-over in a clustered environment it is needed that the Expeditor Server software and SQL Server are installed on the same node.

## INSTALLATION STATEMENT

Although all Work Expeditor software uses installation wizards, Compaq advises that only experienced users install the product. Other users should use the services of Compaq or the business partner from which Work Expeditor was obtained.

## HARDWARE REQUIREMENTS

Hardware requirements depend a lot on the number of connected clients and the amount of data that is maintained in Work Expeditor. The following Server requirements are sufficient for a minimal Server:

- 40 Mb of disk space for the server program files
- 100 Mb for data bases
- > 64 Mb of additional main memory for Work Expeditor service
- Pentium 200 MHz or comparable

### Client

- 10 Mb of disk space for client program files
- 4 Mb of disks space for client temporary files
- 10 Mb of additional main memory for Work Expeditor client services
- Minimal Pentium 100 MHz or comparable

## 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

All software for client and server is on one CD-ROM.

The following documentation is on a second CD-ROM:

- Introduction guide
- Server installation guide
- System Management guide
- User guide
- Help Files

Updates of the software and/or documentation may be made available on CD-ROM or via the Internet.

## LANGUAGE VERSIONS

Work Expeditor is a multi-lingual product. The following language versions are available: *English, French, German, Spanish, Italian, Hebrew, Japanese, Dutch, Portuguese, Brazilian, Danish, Finnish, Swedish, Norwegian, Polish, Hungarian, Russian, Czech, Slovak, Simplified Chinese, Traditional Chinese, Korean, Thai, Arabic.*

The French, German, Spanish, Italian, Dutch, Hebrew and Japanese version also contain a localized version of the user on-line help facilities and the User Guide (not in Hebrew). The other language versions are restricted to a localized version of the application dialogues. Development information is restricted to English.

## YEAR 2000 READY

Work Expeditor is Year 2000 Ready.

*Year 2000 Ready* is defined by Compaq as the capability to accurately process, provide, and/or receive date data from, into and between the twentieth and the twenty-first centuries, and the years 1999 and 2000, including leap year calculations, when used in accordance with the associated Compaq product documentation and provided that all hardware, firmware and software used in combination with such COMPAQ products properly exchange accurate date data with the COMPAQ products.

For additional information visit Compaq's Products Year 2000 Ready web site located at <http://www.compaq.com/year2000/>

Work Expeditor V1.2 has been verified to meet the following Year 2000 criteria:

- It supports a date range from at least 1980 to 2099 and will

transition from 31 December 1999 to 1 January 2000 without intervention.

- All date calculations and representations are correct for any date data within the supported date range. All date translations are correct for date data within the supported date range.

The simplest way to ensure Year 2000 compliance is to use dates where the year is specified as four digits. All dates within Work Expeditor are represented and stored in the database using four-digit years.

Work Expeditor itself has no clocks and does not generate dates. Date information is generated by the underlying operating system, which must be set up to use four-digit years, or obtained from users or user programs. The database (which stores date information) and programming tools have to be set up to use four-digit years.

On the programming interfaces, dates have to be specified as four digits. This does not apply when a date/time type is offered by the underlying system (operating system or programming tool) such as Visual Basic. In this case, the use and interpretation of two-digit year numbers is done by the system. Consequently it is recommended that only four-digit dates are used and that systems be set up accordingly.

On the client, Work Expeditor uses the date specification of the underlying system where years may be specified as two or four digits. If two digits are used, then Work Expeditor employs an algorithm whereby numbers in the range 80 to 99 are interpreted as 19xx, and numbers in the range 00 to 79 are interpreted as 20xx.

## SOFTWARE LICENSING INFORMATION

This software is furnished under the licensing of Compaq Computer Corporation's Standard Terms and Conditions. For more information about these licensing terms and policies, contact the local Compaq office or see the licensing page at: <http://www.digital.com/info/software-licensing>.

## ORDERING INFORMATION

### Packaging

The Package of the basic kit contains a CD with all software and another CD with the Documentation and Release Notes. It also contains one server and one client license.

### Work Expeditor Licensing Model

A server license is required for each server where the Work Expeditor software is installed.

A client license is required for each end-user that requires individual access to an Expeditor server. Such a client license is called a CAL (Client Access License). There is no restriction on the number of servers that a user can connect to. The CAL also gives

the rights to install the Work Expeditor client software on more than one workstation.

Be aware that every Work Expeditor user accesses the services of the SQL Server database that contains the Work Expeditor business information. This means that each individual Expeditor user must have the appropriate license to use the SQL Server services.

**Server part numbers**

Kit	Upgrade Kit	Package
OB-61AAA-SA (135166-B21)	OB-61AAA-MA (135167-B21)	QT-61AAA-XA

License	Upgrade License	NVLS
QM-61A9A-AA (135168-B21)	QM-61A9A-CA (135169-B21)	QT-61A9A-TA

**Client partnumbers**

Number of Clients	License	Upgrade License	NVLS
1	QM-61B9A-AA (135171-B21)	QM-61B9A-CA (135180-B21)	QT-61B9A-TA
20	QM-61B9A-AB (135172-B21)	QM-61B9A-CB (135181-B21)	QT-61B9A-TB
100	QM-61B9A-AC (135173-B21)	QM-61B9A-CC (135182-B21)	QT-61B9A-TC
200	QM-61B9A-AD (135174-B21)	QM-61B9A-CD (135183-B21)	QT-61B9A-TD
500	QM-61B9A-AE (135175-B21)	QM-61B9A-CE (135184-B21)	QT-61B9A-TE
1000	QM-61B9A-AF (135176-B21)	QM-61B9A-CF (135185-B21)	QT-61B9A-TF
2000	QM-61B9A-AG (135177-B21)	QM-61B9A-CG (135186-B21)	QT-61B9A-TG
5000	QM-61B9A-AH (135178-B21)	QM-61B9A-CH (135187-B21)	QT-61B9A-TH
10000	QM-61B9A-AJ (135179-B21)	QM-61B9A-CJ (135188-B21)	QT-61B9A-TJ

N.B. The Q... numbers are for the "DIGITAL-oriented" ordering systems. The (13....) part-numbers are standard Compaq part-numbers.

**SOFTWARE PRODUCT SERVICES**

Work Expeditor is supported by Compaq Customer Services through the standard portfolio offerings. Software Product Update Services are available for

both the license (QM- part numbers) and the kit (QB- part number).

The Software license update is offered as NVLS in the US and Asia Pacific (QT-UPI\*\*.\*\* complementary to QMs) and as LS (License Subscription) in Europe (as an attribute of each QM- part number). It is expected that the customer buys a license update for each additional license bought.

The license, media & documentation update is offered as a Packaged Service in the three geographies. The Asia Pacific region and the US have QT-UPI\*\*.\*\* part numbers, while the service in Europe is an attribute of the QB- part number. It is expected that the customer buys one QB- and the complementary service to install the product, and licenses and license updates for any additional systems.

The standard Telephone Support is based on the presence of Work Expeditor in the Supported Product Lists (SPLs) for the Windows NT platform. By buying an SPL, the customer gets telephone support for both the operating system and the layered products, with one part number and price. SPLs can be sold per number of seats, or per incident. There are four levels, with different deliverables (such as response time), for an SPL: Bronze, Silver, Gold and Platinum (or Custom Quote). The service part numbers for Telephone Support via SPL all start with QR-SM\*\*\*.\*\*.

**SOFTWARE WARRANTY**

The warranty support for this software product is 90 days.

**INFORMATION RESOURCES**

Work Expeditor on the WWW:  
<http://www.compaq.com/expeditor>

## TRADEMARK INFORMATION

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