

DocuNECT Lifecycle

Technical Product Overview

This guide provides an overview of the DocuNECT v5.0 Product, a solution for Electronic Document Management.

August 31st, 2017 – For Release 5.0
Version 1.1



www.portfordsolutions.com

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DocuNECT Overview

DocuNECT is an electronic document management software platform which provides a central repository for electronic documents. Coupled with DocuNECT Capture, documents can be managed throughout their entire lifecycle from creation/capture, through management and finally archived.

This document provides a complete overview of the product and is broken down into the following sections:

-  **DocuNECT Lifecycle Overview**
-  **Searching for Documents**
-  **Document Actions**
-  **Homepages and Dashboards**
-  **The Lifecycle Dashboard**

DocuNECT Document Lifecycle Overview

Portford has been a document management service provider for many years and as such we have been working closely with customers on their document management challenges. The presentation of documents to a user is challenging in that a central document management repository can contain many documents to sort through.

When we designed DocuNECT Lifecycle we wanted to make sure that users had easy access to the documents they worked with. Any document management system needs to classify documents and store index data against it. For example, an invoice could be classified as a finance document with index information like *Vendor No.*, *Vendor Name*, *Invoice No*, *Invoice Amount*, etc.

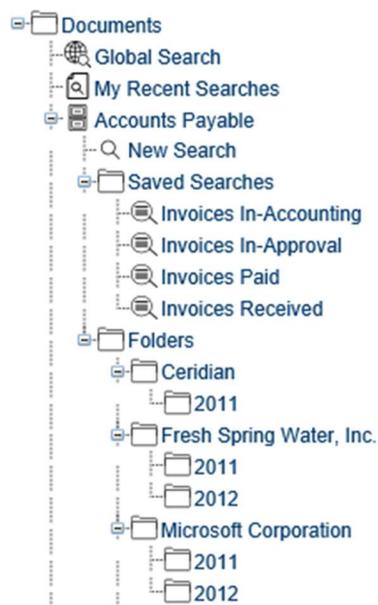
Presenting documents in a folder structure can be counter-intuitive. Businesses have been storing documents on network-based file shares and local PCs for years and the only way to represent index data is within the folder and filenames. When implementing a document management system that supports both index data and a folder structure, it can create confusion.

The other way is having a search interface on a large repository of documents. This is effective and often used for transactional document management (also known as imaging), but misses the mark with more collaborative document management as users are continually conducting searches to get to the documents they frequently access. In collaborative document management users access a small number of documents in the overall scope making constantly searching for documents repetitive.

DocuNECT Lifecycle addresses both presentation problems. DocuNECT Lifecycle does have a powerful search interface that allows users to search for documents by their content and/or the index data. Although it does not have a folder structure, it does have a *My Documents* area for users to tag commonly used documents in different ways.

In the DocuNECT Capture we have cabinets that have an index schema associated with it. One repository may have multiple cabinets to manage different business scenarios. A cabinet stores similar documents that share the same indexing schema. DocuNECT Lifecycle uses the same cabinet structure. Typically, a cabinet would be created for each function, division or department within an organization.

Let's consider how we have designed our own DocuNECT Lifecycle system for use internally. We have designed the system around the different functions in our organization:



The following screenshot shows the administration configuration for the *Administration* cabinet. For this cabinet, we have setup “business” indexes for *Document Name* and *Category* (with values in a pick-list).

Edit	Name	Label	Group	Type	Length	Decimals	Display Format	Multiple Values	Sticky	Required	Read Only	Default Value	Hidden	Encrypt Storage	Auto Complete	Lookup Group	Delete
Edit	Document Name			Text	50			<input type="checkbox"/>	None	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	None		Delete
Edit	Category			Text	50			<input type="checkbox"/>	None	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	Picklist (Data Source)		Delete
Edit	Sub-Category			Text	50			<input type="checkbox"/>	None	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	Picklist (Data Source)		Delete
Edit	Document Date			Date	8		MM/dd/yyyy	<input type="checkbox"/>	None	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	None		Delete
Edit	Contract No			Text	50			<input checked="" type="checkbox"/>	None	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	None		Delete
Edit	Contract Name			Text	50			<input checked="" type="checkbox"/>	None	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	None		Delete
Edit	Who With			Text	50			<input type="checkbox"/>	None	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	Lookup (CDT)		Delete
Edit	Copy Type			Text	50			<input type="checkbox"/>	None	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	Picklist (Static Options)		Delete
Edit	Status			Text	50			<input type="checkbox"/>	None	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	Picklist (Static Options)		Delete
Edit	Contract Start Date			Date	8		MM/dd/yyyy	<input type="checkbox"/>	None	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	Lookup (CDT)		Delete
Edit	Contract End Date			Date	8		MM/dd/yyyy	<input type="checkbox"/>	None	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	Lookup (CDT)		Delete

Auto Complete Settings

Auto Complete:

Options:

Working
 Provided
 Executed

Note: Multiple options can be entered on separate lines.

Index values can be assigned to auto-generate a document name that supports the cross-cabinet searching of documents.

Document Name

This section allows you to configure the options for document name generation.

Available Indexes:

Selected Indexes:

Separator String:

Empty Index Values:

- Ignore indexes with empty values
- Replace empty index values with

Invalid Characters:

- Remove invalid file name characters
- Replace invalid file name characters with #

DocuNECT also automatically manages system indexes for each cabinet, which includes:

- | | |
|--|--|
| <input type="checkbox"/> Document ID | <input type="checkbox"/> Check Out Date |
| <input type="checkbox"/> Batch ID | <input type="checkbox"/> Version No |
| <input type="checkbox"/> Check In Date | <input type="checkbox"/> File Size |
| <input type="checkbox"/> Check Out | <input type="checkbox"/> Originating DocuNECT User |
| <input type="checkbox"/> Check Out By | <input type="checkbox"/> Originating Windows User |

Index values can be represented as a folder structure in the *Browse Cabinets* feature and profiles can be created to specify groups of documents to drive security.

Each cabinet has a home page where the business administrator of that cabinet can create an HTML homepage, if desired, to provide a more intuitive experience for the user. In addition, public and private queries can be created to give a department a self-contained space that they can present in their own way.

Searching for Documents

DocuNECT Lifecycle provides three levels of search that fits different skill sets of the user and the complexity of the search.

- Global Search
- Basic Search
- Advanced Search

When discussing document searching there are three pieces of information DocuNECT needs for all searches:

- ✓ **Index Value** – The index field to be searched
- ✓ **Criteria** – The index value to be searched
- ✓ **Operator** – For more than one criteria an operator is required which describes how the values are to be searched together
- ✓ **Condition** – The condition the value is to be searched by



Global Search

As discussed earlier, one or more index values can be used to dynamically create a *Document Name*. The global search searches all the values contained in the *Document Name* index, and the content of the document, in all cabinets the user has access to. The condition is always *Contains*.

The screenshot shows the Global Search interface with the following elements:

- Header: Documents, Upload, Global Search...
- Search bar: / search.
- Instructions: pe your search text, fill out additional fields as needed, and then press the Search button.
- Search results: conditions are met, y condition is met
- Input fields: Several empty text boxes for search criteria.
- Search button: A button with a magnifying glass icon.

The search results display the name, indexes and the text with the first phrase that was found.

Results

Show Thumbnails Page Size: 10 First Back 1-10 of 77 Next Last

	Document Name	Document Indexes	Document Text
<input type="radio"/>	Dental & Life Insurance Application - Benefits - General Information	Document Name: Dental & Life Insurance Application Category: Benefits Sub-Category: General Information Document Date: 1/1/2012	...Waiver - CA Company name PORTFORD FINANCIAL, INC. Division level Ac...
<input type="radio"/>	Health Insurance Application - Benefits - General Information	Document Name: Health Insurance Application Category: Benefits Sub-Category: General Information Document Date: 1/1/2012	...Waiver - CA Company name PORTFORD FINANCIAL, INC. Division level Ac...
<input type="radio"/>	Benefits Overview - Benefits - General Information	Document Name: Benefits Overview Category: Benefits Sub-Category: General Information Document Date: 1/1/2012	...nefits • Medical insurance - Portford Financial pays 50% of the employee cost f...
<input type="radio"/>	Harassment Policy - Procedures - General	Document Name: Harassment Policy Category: Procedures Sub-Category: General Document Date: 1/1/2012	...harassment in the workplace. Portford Financial takes the appropriate steps to ...
<input type="radio"/>	Introduction to Portford Financial - Literature - General Data Sheet	Document Name: Introduction to Portford Financial Category: Literature Sub-Category: General Data Sheet Document Date: 1/1/2012 Marketing Campaign:	...
<input type="radio"/>	Portford Financial Logo - Campaign - Documentation	Document Name: Portford Financial Logo Category: Campaign Sub-Category: Documentation Document Date: 1/1/2012 Marketing Campaign:	...

Basic Search

The basic search, or default search, provides a method to search for document by their index data (both business and system indexes), and/or the content. The condition is always *contains* and the operator defaults to OR but

New Search

This page allows you to build a new search.

Basic Search

To find specific documents, type your search text, fill out additional fields as needed, and then press the Search button.

Search Reset

Show table data when all conditions are met
 Show table data when any condition is met

Invoice No:
 Invoice Amount:
 Invoice Date:
 Vendor Code:
 Vendor Name:
 Status:
 Category:
 Sub-Category:
 Document Date:
 Invoice Received:
 Invoice Paid:
 Document Text:

Search Reset Add Field: [s] Indexed Add

Results

There was no search conducted.

Advanced Search

The advanced search allows more complex searches to be created.

New Search

This page allows you to build a new search.

Advanced Search

To find specific documents, type your search text, fill out additional fields as needed, and then press the Search button.

<input type="button" value="Search"/>		<input type="button" value="Reset"/>			
Invoice No:	<input type="text"/>	contains	<input type="text"/>	AND ▼	
Invoice Amount:	<input type="text"/>	contains	<input type="text"/>	AND ▼	
Invoice Date:	<input type="text"/>	on	<input type="text"/>	AND ▼	
Vendor Code:	<input type="text"/>	contains	<input type="text"/>	AND ▼	
Vendor Name:	<input type="text"/>	contains	<input type="text"/>	AND ▼	
Status:	<input type="text"/>	contains	<input type="text"/>	AND ▼	
Category:	<input type="text"/>	contains	<input type="text"/>	AND ▼	
Sub-Category:	<input type="text"/>	contains	<input type="text"/>	AND ▼	
Document Date:	<input type="text"/>	on	<input type="text"/>	AND ▼	
Invoice Received:	<input type="text"/>	on	<input type="text"/>	AND ▼	
Invoice Paid:	<input type="text"/>	on	<input type="text"/>	AND ▼	
Document Text:	<input type="text"/>	contains any word	<input type="text"/>	AND ▼	
<input type="button" value="Search"/>		<input type="button" value="Reset"/>		Add Field: <input type="text" value="[s] Indexed"/>	<input type="button" value="Add"/>

Results

There was no search conducted.

The advanced search supports the following features:

- Different operators can be specified for each index data. For example, search for all documents where the *Document Name* contains *Training* OR the *Category* is *Meeting Minutes* AND the text contains the word *Tutorial*.
- Negative operators are supported. For example, search for all documents where the *Document Name* does NOT contain the word *Training*.
- The advanced search provides more flexibility with the condition for the different types of indexes fields (either *Text*, *Numeric* or *Date*)
 - For *Text* index fields, specify:
 - Contains
 - Is Exactly
 - Is Empty
 - For *Numeric* index fields, specify:
 - Equals
 - Is at Most
 - Is at Least
 - Is More Than
 - Is Less Than
 - Is Between
 - Exists
 - For *Date* index fields, specify:
 - On
 - Before

- On or After
- On or Before
- Between
- Yesterday
- Tomorrow
- Today
- In The Last 7 Days
- In The Next 7 Days
- Last Week
- This Week
- Last Month
- Next Month
- Exists

Saved Searches

Complex queries can be saved for re-use.

My Recent Searches

This page displays the list of searches you have made recently.

Refresh

Name	Description	Cabinet
 My Contracts	Contracts I am working on.	Contracts
 Invoices In-Accounting	Displays a list of invoices in the In-Accounting status.	Accounts Payable
 Invoices Received	Displays a list of invoices in the Received status.	Accounts Payable
 Artwork	List all the Artwork used in Marketing Literature.	Business Development
 Benefits	Lists all Benefits documents.	Human Resources
 Invoices In-Approval	Displays a list of invoices in the In-Approval status.	Accounts Payable
 Invoices Paid	Displays a list of invoices in the Paid status.	Accounts Payable
 Procedures	Lists all Corporate Procedures.	Corporate Documents
 Benefits	List all Benefits documents.	Corporate Documents
 My Invoices	Lists all the invoices I am interested in.	Accounts Payable

The Search Results

The search results are displayed columns and display the icon of the document format. A glasses icon is used to indicate whether document viewing is supported. The remaining columns display the business and system indexes. Icons are displayed indicating whether the document is currently checked out, has comments against it, or is in a workflow.

Basic Search

Results

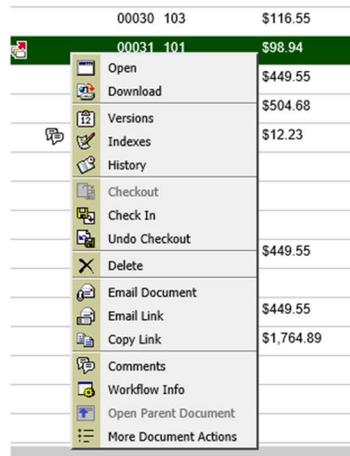
Show Thumbnails

Page Size: 20 First Back 1-20 of 70 Next Last

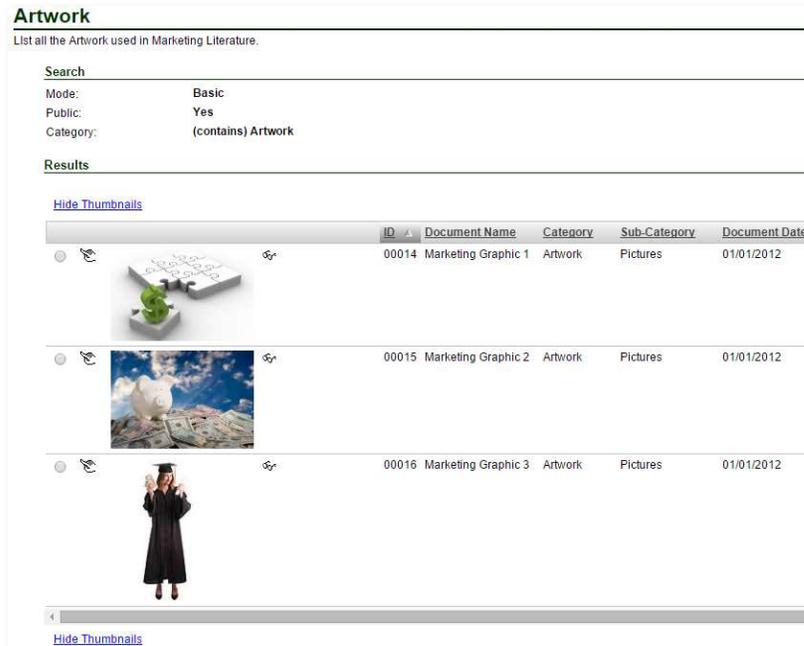
	ID	Invoice No	Invoice Amount	Contract No	Invoice Date	Vendor Name	Status	Category	Sub-Category	Document Date	Invoice Received	Invoice Paid	Fi
	00025	5869364	\$35.00		12/30/2011	Pest Removal, Inc.	Paid	Invoice	Invoice Image	12/30/2011	12/30/2011	01/15/2012	2C
	00026	5869375	\$35.00		01/30/2012	Pest Removal, Inc.	Paid	Invoice	Invoice Image	01/30/2012	01/30/2012	02/15/2012	2C
	00027	5869381	\$35.00		02/29/2012	Pest Removal, Inc.	Paid	Invoice	Invoice Image	02/29/2012	02/29/2012	03/15/2012	2C
	00028	101	\$98.94		12/27/2011	Fresh Spring Water, Inc.	Paid	Invoice	Invoice Image	12/27/2011	12/27/2011	01/15/2012	2C
	00029	104	\$63.75		02/27/2012	Fresh Spring Water, Inc.	Paid	Invoice	Invoice Image	02/27/2012	02/27/2012	03/15/2012	2C
	00030	103	\$116.55		01/27/2012	Fresh Spring Water, Inc.	Paid	Invoice	Invoice Image	01/27/2012	01/27/2012	02/15/2012	2C
	00031	101	\$98.94		11/27/2011	Fresh Spring Water, Inc.	Paid	Invoice	Invoice Image	11/27/2011	11/27/2011	12/15/2012	2C
	00032	68594	\$449.55		12/06/2011	Office Supplies, Inc.	Paid	Invoice	Invoice Image	12/06/2011	12/06/2011	03/15/2012	2C
	00033	95864	\$504.68		03/01/2012	Office Supplies, Inc.	Paid	Invoice	Invoice Image	03/01/2012	03/01/2012	04/15/2012	2C
	00183	INV0001	\$12.23		07/25/2017	Microsoft Corporation	Received	Invoice	Invoice Image				2C

- Hovering over the check-out icon will display who has it checked out.
- Hovering over the comments icon will display how many comments the document has.
- Hovering over the workflow icon will display how many active workflows the document is in.

By right-hand clicking on the document, a list of document actions is displayed.



DocuNECT can also thumbnail images in the search results as shown below:



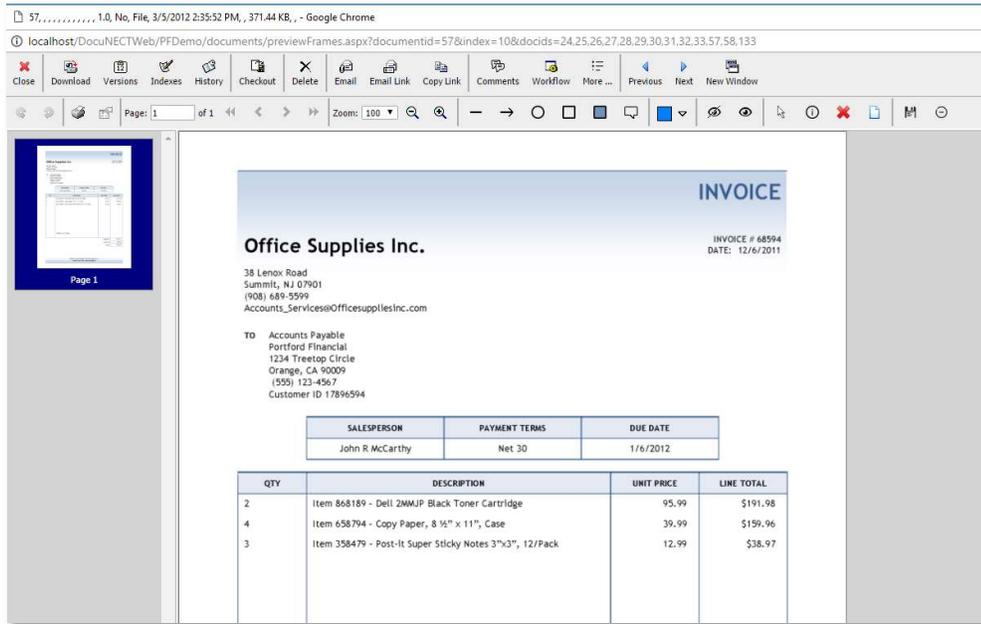
Document Actions

Once the document has been located, different actions can be performed on the document directly from the search results context menu, or the document toolbar menu:



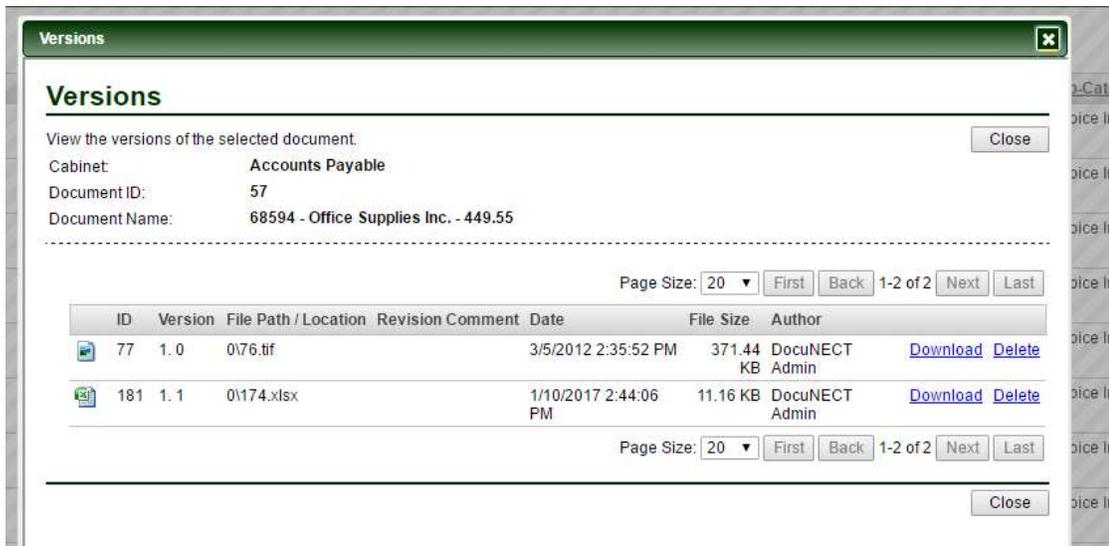
Open/Download

To display a document double click on the search results, or select *Open* from the context menu. The document is displayed in its native format in a document viewing window. DocuNECT also has a built-in image viewer that supports TIF, JPG, BMP, PNG, and GIF files. If the image file has multiple pages, then page thumbnails are displayed.



Versions

Different versions of a document can be stored and accessed for reference purposes:



Indexes

Depending on the user's permissions, this option either views or edits the index values:

Edit Indexes

Edit the indexes of the selected document. Cancel Discard Submit

Cabinet: Accounts Payable
 Document ID: 28
 Document Name: 101 - Fresh Spring Water, Inc. - \$98.94

Public Indexes

▼ Invoice Header

Invoice No: 101
 Invoice Amount: \$98.94
 Contract No:
 Invoice Date: 12/27/2011
 Vendor Name: Fresh Spring Water, Inc.

► Invoice Processing

► Cost Center/GL Code Assignment

System Indexes

Document Name: 101 - Fresh Spring Water, Inc. - \$98.94
 Batch ID: 7
 Batch Label: -

Office Springs, Inc.

Checkout, Check-In, and Undo Checkout

Depending on the user's permissions, documents can be checked out for editing. This places a lock against the document to prevent other users from editing at the same time. On check-in, the user can set the version and enter any change comments.

Check In

Upload a new document version for selected document. Cancel OK

Cabinet: Business Development
 Document ID: 19
 Document Name: Portford Financial Logo - Campaign - Documentation
 Current Version: 1.0

Modified document location

Select File Choose File No file chosen Upload
 Uploaded file: Portford Financial Demo - v5.0 - Sales and Marketing.docx (515.10 KB)

Add URL

Choose the new version number

Minor revision: 1.1
 Major revision: 2.0
 Custom version:
 Latest Version: 1.0

Revision Comment

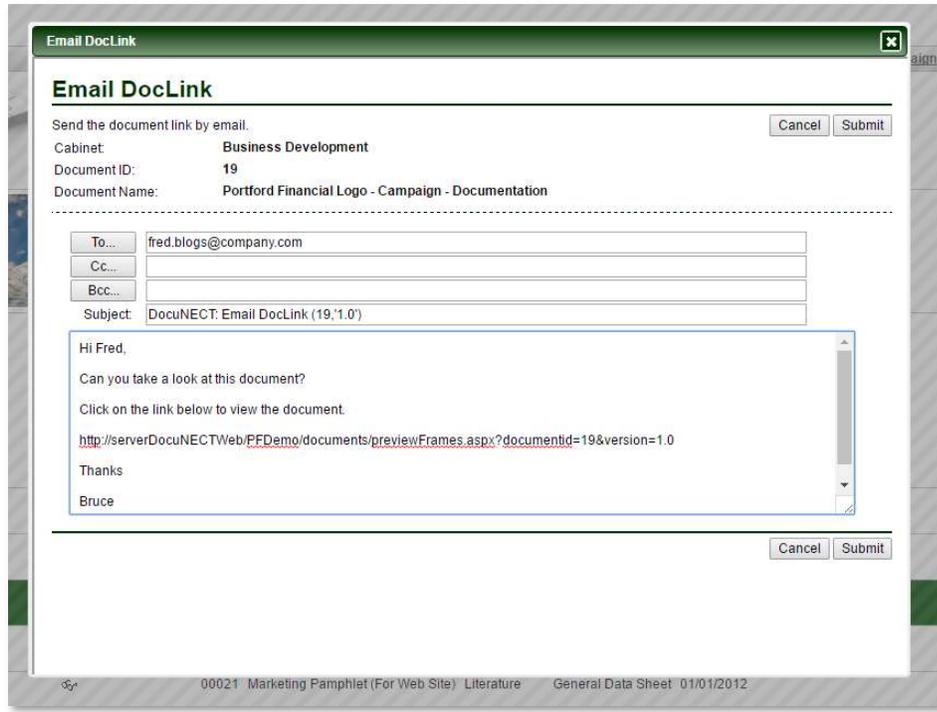
Comment (optional): Made some changes to the introduction.

Cancel OK

00021 Marketing Pamphlet (For Web Site) Literature General Data Sheet 01/01/2012

Email Document and Email Link

Either the document or the link to the document can be emailed to external users or users within the system.

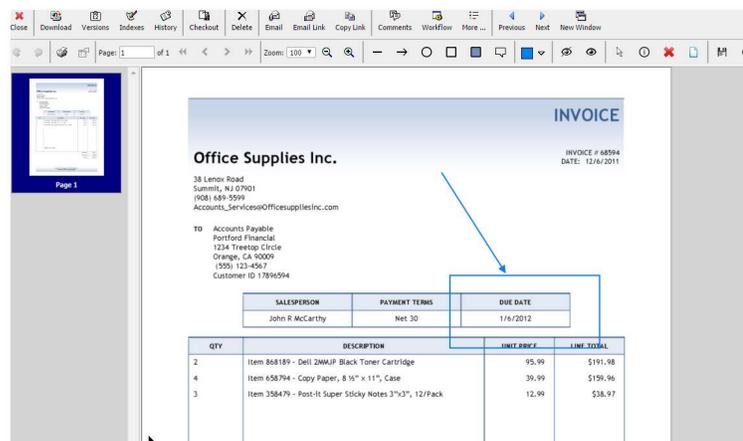


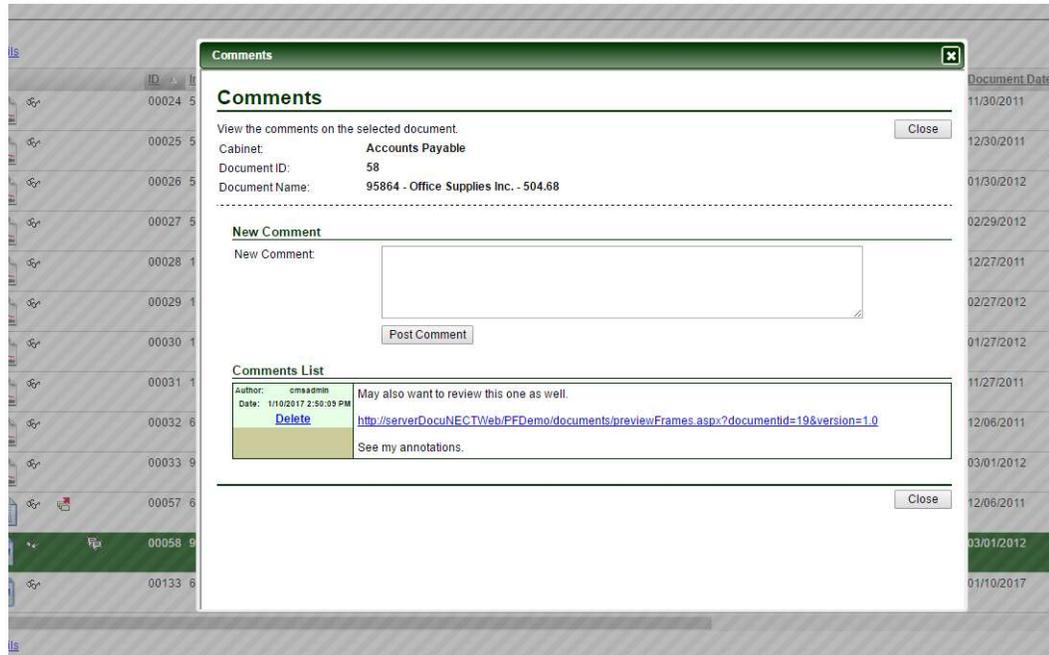
Copy Link

This option copies the link to the document to the Microsoft Windows clipboard so it can be copied into another system or document.

Document Comments and Annotations

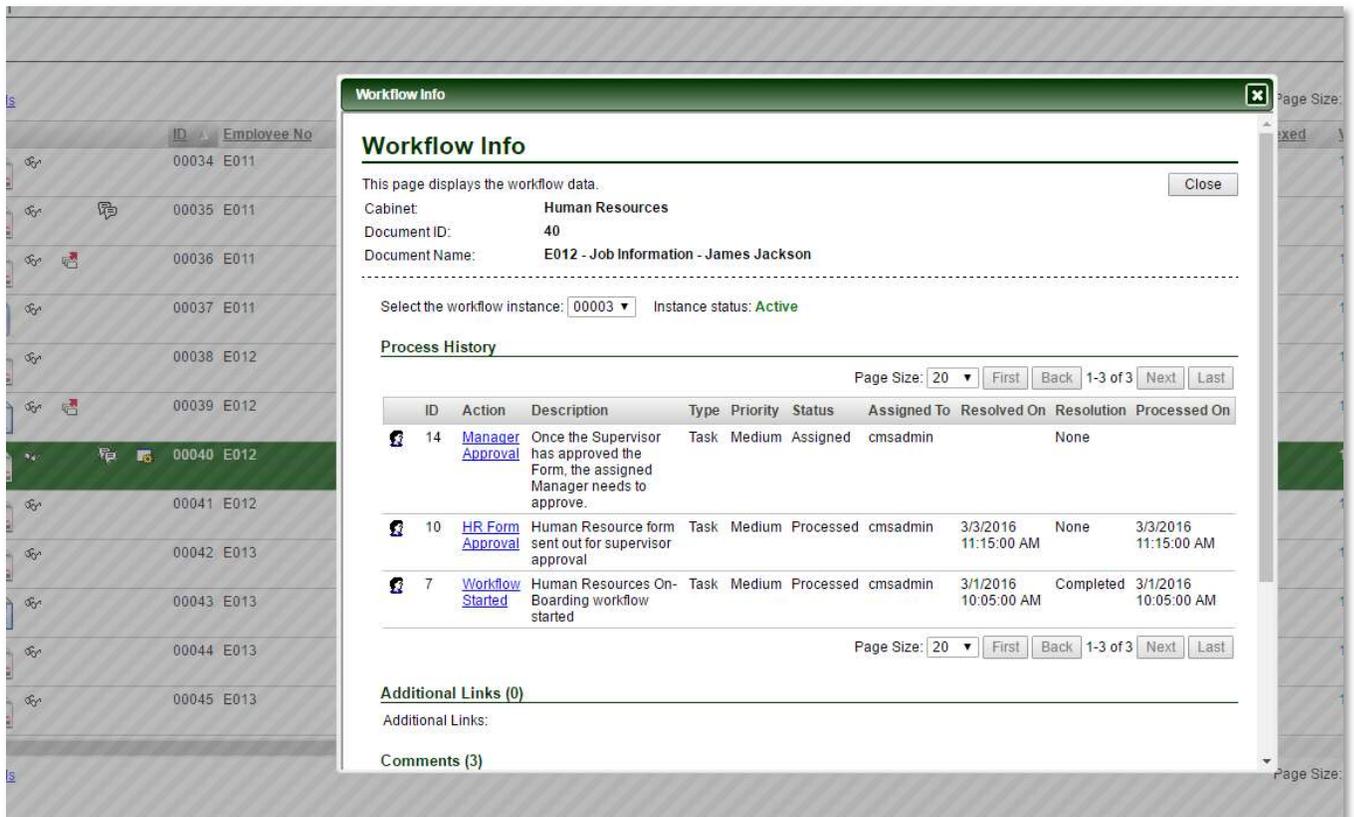
Comments and annotations can be made on a document as part of a review process. Links to other documents or web sites can also be included.





Workflow Info

Displays the history of all the workflows the document has been associated with.



Records Retention

Documents need to be kept for a period of time to meet regulations and internal policies. DocuNECT's document retention allows rules to be applied to different types of documents to manage the retention and document disposition process.

- Add retention rules to different categories of documents.
- Retention rules can be based off the document's business or system attributes. For example, a rule can be created to keep all invoice documents 7 years from the creation date.
- An owner is assigned to the business rule category that receives notifications of documents that are becoming eligible for disposition.
- DocuNECT supports different methods of disposition from a security change (take the document out of users view) to actual deletion.
- Documents can be placed on hold if they are still involved in a business process.

The following screenshot shows document categories and sub-categories and the assigned retention policies.

Results
The following records match the search criteria:

Page Size:

<input type="checkbox"/>	Cabinet	Category	Sub-Category	Retention Policy	
<input type="checkbox"/>	Edit	Accounts Payable	Invoice	Invoice Image	Financial Policy
<input type="checkbox"/>	Edit	Accounts Payable	Invoice	Checks	Financial Policy
<input type="checkbox"/>	Edit	Accounts Payable	Invoice	Purchase Orders	Financial Policy
<input type="checkbox"/>	Edit	Demo Documents	Administration	Meeting Minutes	General Policy
<input type="checkbox"/>	Edit	Demo Documents	Administration	Reports	General Policy
<input type="checkbox"/>	Edit	Demo Documents	Administration	Report Summary	General Policy
<input type="checkbox"/>	Edit	Demo Documents	Project	User Requirements	General Policy
<input type="checkbox"/>	Edit	Demo Documents	Project	Technical Design	General Policy
<input type="checkbox"/>	Edit	Demo Documents	Project	Testing Document	General Policy
<input type="checkbox"/>	Edit	Corporate Documents	Procedures	Customer Services	General Policy
<input type="checkbox"/>	Edit	Corporate Documents	Procedures	Product Strategy	General Policy
<input type="checkbox"/>	Edit	Corporate Documents	Procedures	General	General Policy
<input type="checkbox"/>	Edit	Corporate Documents	Forms	Employment Application	General Policy
<input type="checkbox"/>	Edit	Business Development	Templates	Product Data Sheet	General Policy
<input type="checkbox"/>	Edit	Business Development	Templates	Product White Paper	General Policy
<input type="checkbox"/>	Edit	Business Development	Templates	Product Presentation	General Policy
<input type="checkbox"/>	Edit	Business Development	Literature	Product Data Sheet	General Policy
<input type="checkbox"/>	Edit	Business Development	Literature	Product White Paper	General Policy
<input type="checkbox"/>	Edit	Business Development	Literature	Product Presentation	General Policy
<input type="checkbox"/>	Edit	Business Development	Literature	General Data Sheet	General Policy

Page Size:

Once the records retention period on documents have been reached a workflow task is sent to the category owner so they can approve the disposition, or place documents on hold.

Data Work Documents Upload Global Search...

[Work > Tasks](#)

Work

This page allows you to access the work tasks.

Tasks

This section displays the tasks assigned to me.

ID	Action	Description	Type	Priority
10249	Record Retention Notification: Procedures - Prodig	As the owner of the Procedures category, Product Strategy sub-category. You have received this notification as there are documents assigned to this category/sub-category that will soon reach the retention period. Please review the documents, place any on hold, and then approve the documents to be deleted.	Task	High
10248	Abby Marshall - New Hire Package Review	Abby is currently going through the new hire process, so please review the paper work and provide any comments.	Task	Medium
10247	Invoice INV001_Cost Center Level 2 Review	This task allows the invoice Cost Center Level 2 approval.	Notification	Medium

Page Size:

Homepages and Dashboards

Homepages are static documents or HTML pages that can present information to users, whereas dashboards extend the homepage to become more dynamic with information and functions.

Homepages

To give the users a more intuitive experience, dashboards can be added at the system level, for each role, or for each user. A homepage is an HTML document that is imported into the system, or a link to a document already within the system.

As soon as one of the homepages is setup the *Home* link becomes available on the user's menu bar when they log in as shown below:



Cabinets can also have home pages as discussed earlier, so by using a combination of *Home* and the *Cabinet* homepages users can navigate the system more in a web site structure.

Dashboards

Dashboard allows DocScript to be added that dynamically populate information. For example, a homepage can be created that contains a link to all the error batches, or a list of document searches. The following information can dynamically be added to a dashboard:

- ❑ Admin Information:
 - Storage space monitoring
 - Connectors that have an execution error
 - Link to Application Logs
 - Links to the different parts of the *Administration* sub-menu
- ❑ User
 - Batch status information
 - Document count information by index field criteria. (For example, count the number of invoices in the *Finance* cabinet that have a status of *Paid*)
 - Cabinet list with descriptions
 - Dynamic hyperlinks for saved searches, data tables, inbox, document upload, and batches

Folder Structure

Each cabinet can have a defined folder structure, which is based on cabinet indexes for consistency. This provides a “drill-down” to business documents:

The screenshot displays the DocuNECT web interface. On the left is a navigation pane with a tree view of folders. The main content area shows a document list for the folder 'Accounts Payable\Fresh Spring Water, Inc.\2012\'. The document list is a table with the following columns: ID, Invoice No, Invoice Amount, Contract No, Invoice Date, Vendor Name, Status, Category, Sub-Category, Document Date, Invoice Received, and Inv. Two documents are listed:

ID	Invoice No	Invoice Amount	Contract No	Invoice Date	Vendor Name	Status	Category	Sub-Category	Document Date	Invoice Received	Inv
	00029 104	\$63.75		02/27/2012	Fresh Spring Water, Inc.	Paid	Invoice	Invoice Image	02/27/2012	02/27/2012	03/
	00030 103	\$116.55		01/27/2012	Fresh Spring Water, Inc.	Paid	Invoice	Invoice Image	01/27/2012	01/27/2012	02/

Taking It a Step Further

As dashboards use HTML, they can also be extended to provide powerful functionality and can be made more interactive with the use of JavaScript, JQuery, and AJAX coupled with DocuNECT’s web services. A good example of this is the *My Documents* dashboard that uses these technologies to present graphs and real-time information.