

Expedite Vs Web-based Systems

Expedite is unique in its ability to extend the capabilities of the operating system to manage documents more effectively. Users maintain their ability to manipulate files through the native file manager on Windows, but with the added features of Expedite, such as managing the editing-approval-review cycle, audit logging, real-time reporting, just to name a few.

Several other companies have chosen to base their system off of a web interface. While a common approach, there are many side effects of deploying and maintaining such a system that you need to be aware of that impact overall cost, maintenance efforts, and usability. Such a system can impact many different aspects of an organization. How you view a system such as this depends upon what role you have in the organization. The three key roles are the decision maker, who makes the decision to put in such a system, the IT staff that have to actually install, deploy, and manage the system, and last but not least, the end user who has to actually use the system for real work.

Keeping it Simple

The major difference between Expedite and a web-based system is the way files are accessed. Expedite allows users to continue with their long-understood way to navigate directories, right click, open files, etc. A web based system forces users to abandon what they know about files and forces them into a new way of thinking, as dictated by the whims of the vendor. This is hardly a philosophical difference. The amount of time users spend manipulating files can be enormous. Having to remember to sometimes use one method and sometimes another is frustration most people can do without.

The Expedite system does not force users to think differently about files, but rather extends what they already know. Keeping things simple has great benefits to everyone in the organization.

While every vendor has the word “simple” in their brochures, they are also proud to show off big, feature-laden web pages showing lots of links, buttons, frames, graphics, etc. Are these really “simple”? What do all those buttons do? Can I screw up the system if I press the wrong one? Even technical people can find these interfaces daunting. Expedite provides the same functionality but does so with just a simple right click on a file.

The consequences of deploying “complex” systems

We see two things happen when a company deploys these so-called “simple” systems, which are in reality, quite complex. First, usually just a single individual will be tasked with running the system and all requests will go through that person. No one else has the time or the patience to learn how to use the system so it evolves into just a tool for a

single individual. Any potential automation advantage is now lost, not to mention the risk to the company should that person no longer be available.

The second thing that happens is that people will begin to hoard files. Since it can be such a hassle to manipulate the system to retrieve a document, they just keep a local copy on their own computer. What kind of benefit is there if people are actively trying to work around it?

The Decision Makers

Expedite has many advantages to make the decision maker's job easier:

1. Simple means that your employees will have a better chance of using it in order to gain the benefits of the system. The less complex the system, the less they will complain about having to use it.
2. Simple means the training costs are significantly less.
3. Simple means your employees don't have to have sophisticated computer users to take advantage of the benefits of the system.
4. Simple can also impact the cost of the infrastructure needed to deploy a system. Expedite is designed to run on very simple hardware. (see the IT section for details).
5. Business processes change. Expedite has been architected from the very beginning to be flexible to respond to these new demands simply and cheaply.
6. What if in the future, we need to switch to a different system? Most systems make it very difficult to migrate files out of their system. This ties you to that vendor effectively locking you to their product. Converting from one of these systems can be a very painful and expensive process. Expedite, by contrast, is an open system that exposes all the files in the file system, and exports all the metadata into XML files readable by automated tools. Expedite doesn't "hold your data hostage".
7. The audit and activity logs are open and available with Expedite. Some systems only allow their tools to be run on their logs preventing analysis beyond what is supplied by the vendor.
8. Some web-based systems are built for a very specific purpose making them of less use with other business process automation projects. Expedite is a very flexible system that can expand to control any file-based process the company has or may desire in the future. Expedite can continue to increase its value to your company.
9. Expedite can be deployed incrementally, starting out small with just a few files and a few uses, and can grow as the situation warrants. This can greatly increase the probability of success of deploying a system like this. Many web-based systems require the commitment to a full implementation even if only a few users or files are initially configured.
10. Expedite supports open source tools that can significantly reduce the cost of deployment. One example is that many vendors sell a text search package as an

add-on module. Since Expedite is an open system, tools such as Google Desktop can be run on the files without additional costs.

The IT Personnel

The Expedite system has been designed with the IT person in mind. We have attempted to remove or lessen the impact of the Expedite system on the day-to-day operations of the IT staff. With this in mind, these are the advantages that Expedite provides over the traditional web-based systems:

1. Security is a major concern for any company. IT should not have to add to that risk with the inclusion of a web server that is subject to attack, even if only used internally. The Expedite system utilizes existing security capabilities and is an internally controlled system keeping any security exposures to an absolute minimum.
2. Most of these web-based systems require you to first install the server edition of windows with all of its licensing costs, then install and configure Internet Information Server with all of its ongoing security concerns, then install SQL Server or Oracle, neither of which are cheap. Then, you can install their software. All of these add management burden to the IT personnel. Patches to one may cause problems with the overall system's functionality. Expedite does not require any of these systems and can run quite acceptably on XP Pro.
3. The small amount of client software to support popup dialogs and right click commands, is actually a good thing. It keeps the network traffic down, eliminates the hassle of browser incompatibilities, and allows users to use their own applications to edit and view the documents. However, traditional client software has required manual upgrading whenever a new version is released. Expedite completely automates this process. When the server is updated, all the clients will check for new client software, update themselves, and restart without rebooting all within just a few seconds. Once clients are installed, there is no administration overhead involved.
4. No additional security model is required. No new user IDs and passwords are required. No one will be coming to you saying they can't login to the Expedite system or they forgot their Expedite password. You also don't need to learn and to trust a new security model. You are not signing up for yet another patching management commitment. You don't need to keep updating and patching a different security system.
5. Should the Expedite system go down, all the files on the system are still accessible by all the users. All the files are still protected from modification as well, using the file system access control lists. This greatly relieves the pressure of IT people to get a system back up and running to keep the business operating. When many of the web-based systems fail, users are completely isolated from their information.
6. Since people are less inclined to keep their own copies of the files because they can just access them directly on a network drive, the additional time and expense of backing up all these extra copies is eliminated.

7. The administration of the server operating system is separated from the administration of Expedite. Business process owners can do their own configuration and control of the Expedite system without IT intervention.
8. Many web systems hold their files within some form of SQL database. Installing, configuring, managing, administrating, and paying for another database is eliminated with the Expedite system. It uses a simple XML database and only stores the metadata, not the files.
9. Backup and restore of the system is simplified because Expedite automatically exports all the database contents to XML files each night. All that is required is that the files be backed up. There is no need to synchronize a shutting down and restarting of the database just to backup the system.
10. Some systems use proprietary file formats and private encryption of the files. It is difficult, if not impossible, to extract these files in the future should the need arise.
11. Storage management is built into Expedite. An expensive and complex replicating database is sometimes required for high availability web systems to maintain access to important files to keep the business running.
12. Hardware requirements are significantly less than many web-based systems. A simple XP Pro system is all that is required for a server. Server editions with their associated client license, database licenses, upgrades for high availability, etc. are all not required by Expedite. (Note: Expedite will run on the server editions of Windows if desirable but they are not required.)
13. With Expedite, should a file be improperly deleted or corrupted, it will automatically be recovered from a mirror without any IT intervention. This type of complex storage management must be added to most web-based systems at additional cost.
14. Since the Expedite system controls the lifecycle of the documents, we know what can be or needs to be archived. Old revisions, obsolete files, etc. can be archived off of our system very easily. Systems that hold files within a database tend to have varying levels of support for removing or archiving data out of their systems.
15. No Expedite software is required to set anyone up to be able to view the documents. Since they are on the network all that is required is network permissions to access the files.
16. Since the files are just stored in the file system, automated scripts can easily be written to access these files. It can be very tricky to write scripts to access files automatically from a web-based system.
17. The Expedite system itself can be tailored by writing some simple scripts to quickly respond to unanticipated business needs.

The End User

Here are some comments from users of Expedite:

1. It works like I already work. I access files using Windows. I double click on a file and it opens so I can look at it. I don't have to toss out everything I know

- about using files on Windows and have to trip over a web browser to copy files back and forth to some server someplace.
2. I don't have to try to view my files through a browser. Some of my files can't be viewed using a browser. I have to first check out the file, find a place for it, copy to my system, and then open it up. After while, I just make copies of everything I need. With Expedite, I just double click on the file.
 3. I didn't get intimidated by the complexity of the system. In fact, I already know how to use most of the system. I can teach other people how to run it very quickly.
 4. I like software with tiny manuals.
 5. Don't have to copy files off the system in order to manipulate them anymore. I can just use them in place through my windows file manager. I don't have to worry if my copies are out of date or not.
 6. All I need to do is login to my computer. I don't need to remember yet another set of login IDs or passwords.
 7. I can setup the system to interact with external entities without running a security risk. I can include our customers and vendors in the review and approval of key documents without triggering security concerns from our IT department.
 8. I always know where the latest copies of the documents are located. People are not pestering me anymore for a copy of this and that.
 9. I can make links to these files from other documents easily.
 10. I don't need to logon to a server, click around to where I need to go, and then try to do something. For example, just the fact you click on a link in an email triggers a simple dialog asking if you agree to the changes or not. It can't get any simpler than that! The documents come to me. I don't have to go to them.
 11. All that time we spent creating templates for our files and forms, and more importantly all the time getting everyone used to the forms, are usable as-is with Expedite. I just import them with a simple right-click command and they are immediately available for use in the system.
 12. Since the templates are the same as we are used to, people are going to do a better job at filling them out and using them correctly.
 13. Simple modifications to the templates allow me to enter data only once. The file will automatically be updated with the information as well as entered into the database to be tracked. I don't have to try to remember that information in some separate spreadsheet and hope they are consistent. I know that the file always holds the most up to date information.
 14. I can use my favorite search engine, such as Google Desktop, to quickly search on the content of the files. I don't have to run the vendor's version of what they think I want. I can even run different search engines depending upon my needs.
 15. Every file type is supported. Even future file types are supported. I don't have to worry about creating files that I can't store. I don't have to convert files from one type to another just to keep the document management system happy. Even our custom application's weird file type is supported and can be tracked in the system. I also don't need to do anything to support a new file type. It just works.
 16. Files can tell me when they need attention. I don't have to constantly go out and prowl for work to do.

17. Managers want all these metrics they care about and with Expedite, I don't have to decide what to do - my job, or get them their metrics. Instead, I get something that does some of my job for me and the managers get their metrics without me doing anything else.
18. I can get the information stored in Expedite out in a form that I can manipulate with the tools I already know how to use. Excel spreadsheets are generated to show the current metadata values of all the files, for example. Some web-based systems show all the data as web forms, making it very difficult to do any kind of additional processing in a convenient manner.

Summary

Software should leverage everything the users have and already know. Expedite is a non-threatening approach that really fits the definition of simple. Users can adapt to it very quickly gaining the benefits of document control without the problem associated with these more complex systems. Reap the rewards of simple. Try Expedite!

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