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PatOrg CMIS-Interface

Content Management Interoperability Services (CMIS)

CMIS defines an open standard for communicating with Document Management Systems (DMS). It shall overcome system-specific programming interfaces in order to ease integration of DMS. For this purpose, CMIS specifies a domain model plus a set of methods and protocol bindings for Web Services, a CMIS compliant content repository must support. Using CMIS service calls, it is possible to navigate through and create content in a repository. Moreover, the standard foresees a query language for searching both metadata and full-text content¹.

CMIS was launched by an industry group consisting of leading IT companies including Adobe, ECM, Microsoft, IBM, Oracle, Opentext and SAP. On May 1, 2010 CMIS became an official organization for the Advancement of Structured Information Standards (OASIS) specification.

Leading strategic IT analysts Gartner and Forrester see great potential in CMIS ^{2 3 4}

Taking advantage of a standardized interface, CMIS compliant systems can be easily connected and synchronized as e.g. to set up Enterprise File Synchronization and Sharing (EFSS) services referring to a range of on premises or cloud based capabilities that enables to synchronize and share documents and other files across mobile devices and desktop PCs. Sharing can happen between people (for example, partners and clients) within or outside the organization, or on a mobile device, as data sharing among apps.

PatOrg 6 is the first IP Management Software world-wide that fully supports and leverages CMIS. So, any CMIS-compliant DMS like Alfresco, d.velop d.3 or Agorum seamlessly integrates with PatOrg and can be used to manage files efficiently without further adaption. Taking advantage of a DMS, PatOrg is able to handle documents in an audit-compliant manner and thus fulfils a crucial prerequisite for paperless office. In addition, third-party systems can also access documents including metadata stored in PatOrg using CMIS e.g. for EFSS

Enter the world of CMIS and get connected to various interesting tools and services!

purposes by means of tools like CMISync. PatOrg 6 fully supports CMIS protocol version 1.1 based on ATOM and REST bindings. The interface particularly provides:

Head-less mode

The DMS of your choice runs in headless mode. So, it is fully controlled by PatOrg and works as a database for documents in the background complementing the relational database for storing structured data. As a result, users use only one software.



1 OASIS CMIS Specification: https://www.oasis-open.org/committees/tc_home.php?wg_abbrev=cmis

2 Mobilize, Monetize and Harvest Enterprise Content with Interoperability Standards, Forrester Research, 28. February 2014

3 Magic Quadrant for Enterprise File Synchronization and Sharing, Gartner Inc., 22. July 2015

4 Use CMIS to Unify Content Across On-Premises, Cloud and Hybrid, Gartner Inc., 10. February 2015

Storage

All kind of documents can be stored in the DMS. Document metadata remains in PatOrg's document management. Documents are only stored in one place. No double document retention. It is possible to manage only documents of particular categories in DMS. No need to move all existing documents in the DMS at once from the beginning.

Versioning / Auditing reliability

For all documents or only those assigned to particular categories, document versioning may be activated so that any change is traceable. All previous version is accessible and recoverable from PatOrg's document management. Documents are safely stored and can be only accessed via PatOrg or the DMS directly.

Full text search / Alerting

CMIS interface includes a special filter enabling full-featured text search for all documents stored in DMS. Full text search can be freely combined with metadata search criteria. PatOrg offers to define alerts considering documents' content so that users immediately get informed when key words are found which is particular useful for conflict checks.

Renditions

Document renditions such as PDF conversions or thumbnails (dynamically) created by the DMS are made available via PatOrg's CMIS interface and accessible in PatOrg's document management.

However, PatOrg 6 is not only capable to store documents in any CMIS-compliant DMS but works as CMIS server as well! So, third-party systems get controlled access to all kind of data and documents managed with PatOrg conveniently via REST web service. For this, PatOrg enhances CMIS object model to cover also other entities such as cases, contacts, due dates and many more. As a result, PatOrg „understands“ CMIS universally and offers this way a standardized method for system integration. Using PatOrg's CMIS interfaces it is thus rather easy to create apps for PatOrg or establish connections to other software.

The following CMIS-compliant DMS are already used with PatOrg:

- Agorum
- d.velop d.3
- DocuWare (not CMIS-compliant, but CMIS-DocuWare-Adapter available via third party)
- Sharepoint 365 (not CMIS-compliant, but cmis-Sharepoint-Adapter in development)

The following additional DMS are CMIS-compatible and can be connected:

Commercial, CMIS-compliant DMS

- ELO
- SAP DMS
- SER Doxis

Open-Source / Freeware DMS

- Alfresco
- eXo
- Nuxeo
- Hippo CMS
- docCMS
- LogicalDoc

(List makes no claim to completeness)