

**REPORTS, INTERFACES, AND
CONVERSION**

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1. INTRODUCTION

This document provides an overview of the DMS requirements for reporting, interface, and conversion. There will be two distinct DMS systems: one for the Appellate Courts, and the second for the Judicial Council of California. Each system will have distinct reporting, interface, and conversion requirements. Both systems will share the same security integration requirement.

Refer to Appendix B-01 Technical Requirement for specific reporting, interfaces, and conversion details.

2. REPORTS

DMS system shall maintain audit log of system events, workflows, import/export, read/update of documents, and other events. The DMS system shall produce reports for accounting, auditing, and system administration.

3. INTERFACES

The DMS system for the Appellate Courts shall integrate with a custom-built Appellate Case Management System (ACCMS). The DMS shall provide secured web services for automating document upload from ACCMS in real-time. Documents upload shall be uniquely referenceable as persistent link to be preserved in ACCMS.

The DMS system for the Judicial Council of California shall integrate with SAP, SharePoint, various Case Management Systems (CMS) (e.g. Tyler), and other custom applications. Similar to the Appellate Courts DMS, the DMS shall provide secured web services for automating document uploads in real-time.

For mass uploads, the DMS shall provide secured file transfer of document and metadata files. The mass uploads shall be processed asynchronously without impacting the system performance for online users, especially during business hours.

4. CONVERSION

Documents currently residing in ACCMS will be exported to flat-file with metadata for each document. Standard filename convention provides additional information about each document. Current Appellate document size is about 7TB in storage volume. DMS system shall provide the means to securely mass upload the documents.

Document for JCC systems currently exist in SAP, SharePoint, external vendor producing the documents, local area network shared drives, and other custom systems. Any native support for directly interfacing these systems would be a plus.