SYSTEM, METHOD, AND USER INTERFACE PROVIDING CUSTOMIZED DOCUMENT PORTFOLIO MANAGEMENT

ABSTRACT OF THE INVENTION

A system for customized document portfolio management. Corresponding methods and user interfaces are provided accordingly for allowing customized document portfolio management. In an preferred embodiment the system includes a document metadata database storing a plurality of documents and meta information thereof, a management server programmed to rule engine, search, security engine and notification engines, and a web server providing an interactive website for displaying documents and allowing creation of a customized portfolio. The customized portfolio management system preferably provides notification on the website, apprising users of changes in the status of their documents. Unique technical identification codes may be used to establish relationships among document.

FIG. 1