

OpenText™ Document Management, eDOCS Edition

A single, centralized repository for managing, securing, and accessing your collective work product

In today's digital work environment, operations are increasingly document-intensive and a changing workforce expects information to be easily and instantly available. To respond and thrive, organizations need a robust, intuitive solution to control and manage their work product – all the collective documents related to a client, project, matter, or case.

The pace is unrelenting. Many organizations today struggle to keep up with ever-growing volumes of content, to address threats to its security, and to comply with regulations for how it is handled. To manage your firm's exposure to risk, it is essential for your work product to be managed and protected in ways that are compliant with regulation. At the same time, information is the lifeblood of the organization, the fuel for day-to-day operations. To quickly respond to customers and maintain productivity levels, you need powerful, intuitive ways to capture, retrieve, and work with collective and related information.

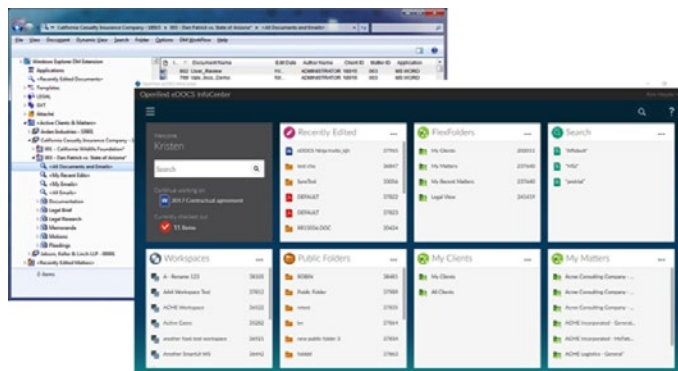
Despite these requirements, many organizations still don't have the ability to access collective information quickly and easily. According to McKinsey & Company, employees spend 1.8 hours a day – almost 20 percent of their work week on average – searching for documents. In many cases, they can't find what they are looking for and need to recreate it. In other situations, critical documents cannot be found and decisions are made based on incomplete data. The inability to control, manage, and quickly access a complete set of work product can negatively impact a firm's productivity, profitability, and customer satisfaction.

Document Management (DM) systems were developed to provide a secure, centralized home for documents – to provide rapid access to complete information on an enterprise-wide basis, while ensuring the information remains secured, governed, and compliant. But, responding to customer needs, modern DM solutions have evolved and expanded to do more. Today, they can capture and manage all sources of work product, regardless of file type – including documents, emails, images, drawings, media files, and more. In addition, modern DM solutions also boost content capture levels by offering simplified ways to save and synchronize content into the centralized DM repository or knowledge base – not just from familiar email or authoring applications but from storage locations on desktops, in Microsoft® SharePoint®, or in cloud repositories.

PRODUCT SUMMARY

OpenText™ eDOCS DM eliminates the “islands of information” and “content chaos” prevalent in many organizations. It enables users to capture, organize, secure, and manage work product in a secure, integrated, and intuitive environment. From documents, email, graphics, forms, engineering drawings, scanned paper, and electronic-based records, collective content is consolidated into a single, centralized knowledge base for easy access and retrieval.

Equally important to capturing a complete set of information into the DM repository, is the ability of modern DM solutions to make controlled information easily accessible – at the right time, in the right context – to users, processes, and third-party applications. Powerful search results provide users and applications with a complete, holistic view into the client, project, matter, or case – for better, more informed decision-making. In addition, controlled information can flow seamlessly across business processes, to be consumed by users and to support efficient day-to-day operations. Lastly, modern DM solutions must provide a user experience that meets the needs of today’s modern workforce. It must be flexible and easy to customize. It must integrate seamlessly with the content authoring and productivity tools the user knows and uses. By providing access to DM functionality within a familiar, intuitive environment, the modern DM solution can boost user adoption, increase content capture levels, and ensure quick access to complete information. This will not only reduce your firm’s compliance risk, but improve its productivity, profitability, and customer satisfaction levels.



eDOCS DM Interfaces: Classic “DM Extensions” and modern “InfoCenter” dashboard

Document Management, eDOCS Edition (eDOCS DM)

A Single, Secure Repository

eDOCS DM is a modern and proven document management solution purpose-built for the needs of document-intensive operations.

It consolidates collective business information into a single, centralized repository where it is managed and secured, yet remains easily accessible. In this way, eDOCS DM eliminates the “islands of information” and “content chaos” prevalent in many organizations and provides the means to control, manage, and effectively work with growing stores of digital content.

A Solution that ‘Works the Way You Do’

To boost productivity and user adoption levels, the eDOCS DM solution provides choice and flexibility in how users work and how they access DM functionality. Using our classic DM Extensions, users can engage eDOCS DM from the ribbon of their Microsoft® Office productivity tools. We offer web-based and desktop interfaces. Alternatively, users can build a customized InfoCenter dashboard to surface content from DM in the form of ‘tiles’ – so important or frequently used information is just a click away.

When it comes to working with content, users can easily organize information in a personal workspace. For collaboration, users can share those workspaces with other DM users and secure them accordingly.

Instant Access to Complete Content

Findability is key to productivity. Our metadata approach and powerful search capabilities provide instant access to related work product – giving users a complete, holistic view into a client, project, matter, or case.

Users can also navigate to content using familiar folder structures or FlexFolders – which instantly display available content based on metadata. They can reference saved searches and recently edited files. They can access a single source of the truth, but still view changes over multiple document versions.

Ease of Administration

eDOCS DM features a scalable platform and distributed architecture designed to maximize system availability and performance. The DM Management Studio provides centralized IT manageability for simplified administration – whether deployed on-premises or in a private cloud. Content metadata is easily configured to provide contextual interfaces for the capture and retrieval of work product. In addition, rapid system deployments are achieved without visiting workstations, and maintenance is simplified with web and Microsoft® Windows® utilities that support centralized as well as delegated system management.

Part of a Complete Offering

eDOCS DM is the platform module for the eDOCS Suite and a key component of a wider Enterprise Content Management (ECM) offering. eDOCS DM supports a wide range of companion solutions for enhanced email management, records management, workflow, business process management, SharePoint integration, mobile access, enterprise search, and much more.

eDOCS DM integrates with a rich set of partner and ecosystem solutions. The solution also provides a flexible API. Using it, data in eDOCS DM can be easily leveraged by external applications.

With all this flexibility and choice, customers can easily tailor eDOCS DM to meet the specific information needs of their environment and to customize their environment for optimal performance.

eDOCS DM Checklist

For End Users

- Familiar browser and desktop interfaces—easy to learn and use; highly configurable and customizable.
- Create and manage documents via standard content authoring and email productivity tools. Alternatively, build your own InfoCenter dashboard for a flexible, customized interface.
- Easily search and retrieve information with advanced search technology, including full-text, search term highlighting, metadata, document summarization, and result clustering.
- Easily locate, share, and collaborate with other users.
- Generate customizable reports for analysis and auditing of content assets.
- Access information via web, desktops, and mobile devices.

For Administrators

- Secure content assets using a flexible model with up to nine different levels of permissions to control document access.
- Rapidly configure the DM repository for metadata capture and the creation of forms used for content profiling and searching.
- With multiple profiles per library, create a context-sensitive user experience tailored to the divergent needs of user populations across the enterprise.
- Perform rapid changes to database structures and forms without the need for costly customizations, further minimizing IT overhead and maintenance efforts.
- With a capacity to support billions of objects, scale the solution to meet your complete content management needs, whether they include plans for centralization or require a more distributed architecture.
- Perform rapid deployments and program updates without physically visiting workstations.
- Reduce cost of ownership through central deployment and administration, including software program updates.

For Organizations

- With a centralized repository and the ability to access the most current version of collective information, users can:
 - Make critical decisions faster with better access to more complete, reliable information.
 - Secure and manage content compliantly, to reduce risk and costs.
 - Reduce the time and costs spent looking for or re-creating information.
 - Improve productivity, profitability, and customer satisfaction.

Features

Superior User Experience

- Choice and flexibility in how users engage DM:
 - DM Extensions user interface integrates functionality seamlessly into the interface of familiar productivity applications
 - InfoCenter user interface lets users build a customized dashboard and surface important or frequently used information as 'tiles'
- Simplified forms view
- Dynamically rendered forms
- Persistent user preferences and recent locations
- Time zone neutrality
- Windows Presentation Foundation (WPF) aligns the User Interface with Windows 7, 8, and 10 operating systems

Security

- Multiple security access levels
- Configurable metadata
- Enhanced security inheritance models

Effortless Deployment and Administration

- DM Management Studio
- Centralized infrastructure management from the convenience of your desktop
- User and group management roles
- Ideal for shared desktop and remote user environments

Enhanced Search Functions

- Single search of Microsoft® Outlook® mailbox and DM repositories from the Outlook interface (Outlook federated search)
- Search within FlexFolders
- Outlook toolbar search to further filter the DM search results
- Unified metadata and Boolean search interface
- Search within subfolders and remote library folder
- Calendar pop-up for date searches

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