

# OpenText Template Workspaces

Take the complexity out of collaborative, content-driven knowledge work.

**Template Workspaces enables organizations to extend existing ECM investments, deliver business value from IT systems, and meet compliance requirements while increasing user adoption. Information Governance is easy, and high value content is better utilized.**

## Business Scenarios:

Some typical applications include:

- **Legal:** general file management, patents, contracts, compliance investigations
- **Human Resources:** employee files, performance management
- **Customer Services:** complaints and escalations
- **Sales:** proposals/bids and opportunities
- **Marketing:** projects or events, new product development
- **Facilities:** security protocols, change management, disaster recovery and business continuity, workplace health and safety incidents
- **Vertical Applications:** case management for public sector, capital projects for energy/engineering, and compliance/risk management for financial services

Collaborating on projects within a single department can be a challenge in any organization and this challenge is only heightened when the work involves individuals across various disciplines, regions or business units. Effectively capturing the knowledge that exists in the realm of the subject matter experts, understanding what's contained within the information assets that already exist, and keeping tabs on who's responsible for what and when requires high level orchestration that is often lacking.

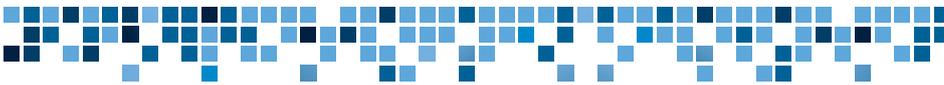
In today's fast-paced environment, there is a reliance on the existing systems to provide not only a secure, storage capacity for the hundreds of assets that are exchanged between employees involved in working toward a common project or goal, but also to provide an environment where everyone can easily access a single version of the truth and understand the context of what needs to happen next or how a decision was reached. Demand for a solution that is easy to implement and cost-effective to manage for the IT department, compliance-based for the records and Information Governance managers, and uncomplicated to use for business users, is more prevalent today than ever.

## Business Challenges

### Easing the burden on the IT department

In most organizations, due to increasing complexity associated with the growth of knowledge-based work and the pressing impacts of doing more with less, responsibility has is being pushed on the IT department to find new and better ways to manage information to make teams and individuals more effective. In turn, IT is also strained due to diminished resources and budgets and is looking to extend the value of existing systems.

Ideally, existing ECM investments can be leveraged to solve new operational challenges, depending on the flexibility and configurability of the solution. Additionally, user adoption is often a justifier for maintaining investments and must be shown to avoid decommissioning. For IT, this consolidation and simplification of systems must be achieved while continuing to deliver on the needs of their customers, who are the business users. Furthermore, empowering the business with systems that are simple to use, configure and maintain will take the burden off IT resources, freeing them up to focus on more critical issues to ensure business integrity.



## Establishing effective Information Governance

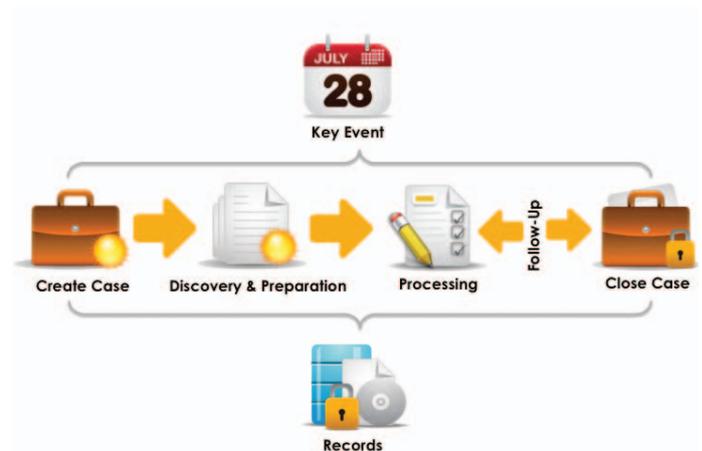
For records managers, the task of establishing and executing Information Governance policies is only part of the challenge. Ensuring end-users adhere to those policies, without disrupting their ability to work efficiently, is critical. For every business activity or process, there are hundreds of documents that need to be properly classified and given appropriate retention schedules. Having a solution that can automate this classification based on how end users interact with content can ease the burden on these records managers to monitor the systems, as well as on the end users to apply the classifications manually. By providing the ability to apply policies to a set of related content in a template manner, the records manager can instead focus on using their expertise and best practices around managing the information lifecycle to contribute to the development of a broader reaching Information Governance strategy.

## Enabling employees to be more productive and effective

Business users are expected to be more efficient and effective every day but the onslaught of information and tasks they are faced with is becoming overwhelming. Much of the work being done is ad-hoc in nature, and is managed with spreadsheets, file shares and email, with no way to aggregate and assess all the individual elements. Users spend too much time searching for content and duplicating efforts, which reduces overall efficiency and worse yet, limits their ability to focus on more strategic activities. Even when users are able to locate assets related to the business problem they are trying to solve, it is unlikely that the full context is available, thereby restricting their ability to make well-informed decisions on the spot. Therefore, companies are looking for better ways to manage information that will make teams and individuals more effective.

An ideal solution can address the business challenges of an organization by providing access to information in the context of related business activities and at the same time, capturing and controlling content that is critical due to operations or compliance requirements. For example, facilities management in an organization can include both strategic and tactical roles. From a strategic perspective, facilities are highly involved in the financial aspects of operating physical assets and in managing business continuity and disaster recovery planning programs that will effectively minimize risk and ensure compliance. From a tactical perspective, facilities are tasked with ensuring proper operation of all aspects of a building to create an optimal, safe and cost effective environment for the occupants to function. This involves everything from managing health and safety programs, to security and maintenance of the facility. With all these moving parts and interdependencies in the work that occurs to support these goals, having consistency around the approach and the information assets is a must.

Taking a template approach to each health and safety incident, for example, can greatly reduce the risk of error, and ultimately improve the safety of the workplace. When handling a single incident, providing a pre-assembled collection of draft reports, policies, procedures, or other guidance documents and the tasks



that will drive the investigation forward based on the severity of the incident can save precious time and resources. Doing that in a way that applies proper classifications and retention policies on the content, without intervention by the end user, ensures the organization is well protected.

## OpenText Template Workspaces

OpenText Template Workspaces, a solution offering that is part of the OpenText ECM Suite, drives business value across a number of lines. It enables organizations to take the complexity out of collaborative, content-driven knowledge work while easing the burden on IT departments, making Information Governance an innate part of everyday business processes and encouraging user adoption with an easy-to-use interface and promise of improved efficiency.

### A flexible, all-in-one solution

With the ECM Suite as its foundation, Template Workspaces helps organizations get more out of their ECM investment by minimizing the reliance on purpose-built solutions and removing the IT burden of supporting siloed departmental systems from multiple vendors. With one solution, organizations can solve existing and new operational challenges by easily configuring new applications without the need for a services engagement, addressing the IT mandate of cost control and optimization of investments.

In an organization where IT is experiencing the strain of reduced resources, having workspace templates can help eliminate repetitive, low value work, such as administration, project setup, setting permissions, etc.

### Compliance built-in and Information Governance ready

Template Workspaces supports the goal to apply effective content governance ensuring that information is properly managed and the appropriate policies are applied, leaving more time for records managers to execute on strategy. With the increasing number of Information Governance requirements being introduced, Template Workspaces eases the pressure on organizations to execute on compliance plans by making it easy and automatic. Organizations can also reduce costs related to potential risk, fines and compliance issues, making the discovery process during litigation a lot cheaper.



With ECM as the backbone of Template Workspaces, classification of content is transparent to end users and ensures that consistent metadata is applied and retention policies can be set around related content. Policies and best practices can be enforced with auto-populated templates where all required information is already there, pre-set by records managers or IT and end user adoption and satisfaction is increased.

**Control of critical content while enabling collaboration and empowering users**

From an end-user’s perspective, Template Workspaces makes everyday business tasks easier and allows users to focus on being more effective. For example, users have the ability to quickly set up a new workspace and aggregate all of the resources – content and people – into one consistent structure and have everything they need in one place. Additionally, there is overall transparency of how the resources are being used, what other team members are up to, and the overall progress of each milestone or goal. Where ad-hoc behavior amongst users existed in the past, a more structured and consistent approach is now possible. Template Workspaces puts the content into context of the bigger picture or business goal and enables users to be more strategic with their time and decision making.

Template Workspaces improves efficiency and effectiveness through better knowledge capture, sharing, and repurposing. Searching for information is made much simpler, “time to information” is greatly reduced and instead, the value of content is captured and utilized.

**Features**

**Templates guide content-rich, business activities –**

Using templates to define and guide creation of workspaces ensures consistency for all metadata, folder structures, and tasks that need to occur. Templates can also include critical information such as policy guides, instructional documentation, classifications for records management, and more. A template workspace can be created for any business need that requires capturing a common set of records, tracking of assignments and examination of results. A highly powerful binder/case

model enables configuration of template structures to meet the requirements of simple or complex scenarios.

**Simple process modeling** – Template Workspaces mimic the way that people work. Often, a specific event will trigger the need to create a new workspace – such as a request for information to support a legal investigation, or an escalation of a customer complaint. Using a wizard to create the new instance of the workspace, the team responsible for carrying out the work is quickly identified and assigned to their role in the process. The template workspace aggregates pertinent knowledge and assets for the team and as the matter moves through its various stages – information is gathered and recorded. Tasks are assigned to the team and completed. Workflows are triggered for review and approval purposes. Supporting evidence is collected and filed. Automated reminders or follow-ups are scheduled for activities that need to occur later in the work lifecycle such as renewals and cancellations, required payments, or product shipments. Then finally the workspace is closed and archived as a business record. Template Workspaces structures the ad-hoc, reduces redundancy and greatly simplifies the way a team works together, helping to improve the collective results.

**Manage work from within the end users’ application of choice** – Managing the entire lifecycle of enterprise content without requiring users to leave their preferred application or user interface (UI), whether it is email, an ERP, Microsoft® SharePoint or Outlook, helps increase user adoption, satisfaction and compliance.

**An ECM backbone supports built-in compliance** – With ECM as a backbone, organizations have access to other useful solutions such as document and records management, imaging, intelligent storage management, archiving, etc. Built-in compliance makes Information Governance a transparent process for users while establishing a defensible and easily reported-on process for executives and RM professionals balancing the value of content with the risk it poses.

**Why OpenText?**

OpenText has an unparalleled track record for delivering solutions with compliance at the heart and business value as a principal. No single solution is able to address the broad variety of use cases, entrench business processes, provide a repeatable template model for execution, facilitate increased user adoption of ECM technologies, and accelerate Information Governance programs as quickly and easily as OpenText Template Workspaces.

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