



Livelink ECM – eDOCS™ for Content Lifecycle Management



Solution Highlights

For End Users
Access and manage content and records from Windows® desktops, web browsers, and mobile devices

Enable better decision making via comprehensive searching of relevant content stores

For Administrators
Framework to capture, manage, evolve, protect, and retire content

Lifecycle management retains relevant business content while removing outdated information

For Organizations
Critical decisions can be made faster with better access to more reliable information

Centralized repository for in-process content and final records reduces IT costs and time spent looking for information

Integrated lifecycle management solution leverages knowledge assets in tandem

Microsoft®
GOLD CERTIFIED
Partner

Providing an Integrated Platform for Managing Enterprise Content Within its Entire Lifecycle

The Compliance and Governance Challenge

Current government regulations and recent court cases have brought the issue of content governance to the immediate attention of public and private organizations. Defined and controlled record policies help to ensure that intellectual content is protected against risks such as litigation or disaster, and that your records practices meet complex regulatory requirements.

At the same time, corporations and all levels of government are looking to add value to their businesses. And content assets are the foundation upon which corporations build new business opportunities and competitive advantage — and upon which governments build accountability practices and ways to better serve their constituents. Leveraging the business value of content while simultaneously protecting that content with an applied records management strategy is not a new concept; however, the conventional means of addressing these tandem needs are changing.

The Content Lifecycle

Content evolves through four stages in its lifecycle:

Capture/Create

Information is generated in an organization in two ways: captured as a record or created by internal authors. Captured documents can be in both electronic and physical form, and may include faxes, letters and correspondence, forms, evidence, email, and the like. Captured items are typically immediately declared as records and associated with retention schedules.

Manage/Review

Not all content arrives finalized; indeed, much of it originates within the organization itself from myriad document creation applications. Workflow tools are often employed to progress content through a review and approval cycle that culminates in a final version, ready for publication and an applied retention schedule.

Distribute/Publish

While some workers create and contribute content, many more have compelling needs to access the knowledge inside documents and records. Traditional printing and distribution processes are giving way to automated access methods, including publishing to intranets, portals, and public Web sites.

Store/Preserve

Governance of content lifespan is abundantly mandated, with companies and governments scrambling to adhere to federal and industry regulations, legislative acts, standards, and compliance measures. Traditionally, file plan classification and retention periods are applied to records when they are declared as final, be they captured or created internally.

Today's Content Lifecycle Platform

In the past, many organizations chose to manage each stage of the information lifecycle independently, with disparate processes, systems, repositories, and technologies. Today, with directives to increase efficiencies while simultaneously improving accountability, an integrated system for content lifecycle management is crucial to meet these goals.

Lifecycle Management Increases Efficiencies

To eliminate redundancy of knowledge-based work and reduce time involved with finding information, organizations and governments are implementing a consolidated, integrated system for document and record capture creation, access, and retention. Moving beyond classifying records only when they are declared final, information is being coded for retention as soon as the first sentence is typed, enabling the developing document to be searchable, navigable, and retrievable from its inception.

As a result, in-process and evolving documents are housed alongside final records, eliminating the time-consuming and unintuitive tasks associated with searching two repositories. Knowledge workers increasingly don't discern between in-process documents and final records — instead, they are simply seeking the information needed to get their jobs done. With an integrated content and records management framework, organizations can accelerate speed to knowledge and quickly deliver the information their workers need, when they need it. This streamlined knowledge access can be used to maximize competitive advantage and improve customer or constituent service.

Content in the User's Context

With myriad content types of mixed status stored in a unified repository, users demand access to that content in their context or "channel" of choice.

Whether from Windows® desktops and applications, e-mail interfaces, web browsers and portals, or even from mobile devices, the knowledge worker expects immediate, relevant access to information. Beyond access, users need to interact with content, from simple searching to participating in workflow tasks, progressing documents through versions, declaring records and associating retention, and querying structured repositories — from any device, any time. An enterprise content lifecycle management platform delivers exactly these access and management tools.

Governance, Litigation, and Investigations

To keep or not to keep — that is the question. Whether the mandate is retention for determined periods, destruction of outdated or irrelevant information, reporting of file activity and access, or even all of these requirements at once, organizations are challenged to find answers. Litigation and discovery procedures are resulting in judicial orders for an accounting of procedures and transactions surrounding an organization's content stores. In particular, e-mail and instant messages are increasingly contentious knowledge sources in terms of usage and retention.

All information can be subject to the legal discovery process, and whether or not an item is formally declared a record is irrelevant. With clear, demonstrable retention schedules for both physical and electronic information — at any time in the lifecycle — organizations can rapidly respond to the discovery components of litigation while demonstrating they have a reliable and trustworthy method for the filing, coding, and retention of their intellectual content.



Solution Highlights

For End Users

Access and manage content and records from Windows® desktops, web browsers, and mobile devices

Enable better decision making via comprehensive searching of relevant content stores

For Administrators

Framework to capture, manage, evolve, protect, and retire content

Lifecycle management retains relevant business content while removing outdated information

For Organizations

Critical decisions can be made faster with better access to more reliable information

Centralized repository for in-process content and final records reduces IT costs and time spent looking for information

Integrated lifecycle management solution leverages knowledge assets in tandem

Microsoft®
GOLD CERTIFIED
 Partner

Relevant information to the discovery process can be quickly produced, while unrelated organizational assets are protected and appropriately omitted.

What content exists, and how it is managed, accessed, and retained are all questions that must be diligently and swiftly answered to the court's or investigating body's satisfaction. Failing to do so can result in fines, penalties, and even business failures, as daunting work stoppage challenges can occur when trying to satisfy legal information requests.

Standards and Regulations

Beyond litigation challenges, many industries face regulations and standards surrounding records management. Proof of policies, methods, and documentation procedures are strategic elements, as well as but audit trails and access reports. Provisions related to FDA, SEC, Freedom of Information, Sarbanes-Oxley and HIPAA compliance expand the context of what types of information need to be tracked, and at what point in time. From the day that a letter is received, to the minute that an e-mail is sent, to the moment a procedure is edited, to the second a patient record is updated; an integrated system that manages all information related to the associated search, audit, publication, retention, and disposal tasks of document-based information will help an organization maximize its accountability and minimize its risk.

Livelink ECM – eDOCS™ RM Complements Livelink ECM – eDOCS™ KM

Too much information can, in fact, be a bad thing. Content that's lived beyond its governance lifecycle becomes irrelevant to the business of the organization, forcing users to cull through endless search results to find valuable information. Lithe information practices include regularly purging outdated, extraneous content, providing organizations with evergreen, germane data stores from which users can make faster decisions with fewer mistakes.

Best Practices

Successful content lifecycle management implementations begin with a cross-functional team of stakeholders in place. Analysis from IT, legal, records management, and business unit staff are critical to establish requirements, guidelines, and milestones. Together, this team can establish a common vocabulary to represent their information management interests, and set to work in establishing a comprehensive lifecycle management framework.

As new forms of content, context, and communication emerge in today's e-Business marketplace, organizations continue to adapt to meet nascent standards and technologies surrounding documents and records. A consolidated platform for the lifecycle management of information assets — physical or electronic, in-process or final — is the technology bedrock upon which organizations build solid records and knowledge management practices.



Content Lifecycle Management (CLM) is the ability to systematically capture, create, manage, review, distribute, publish, store, and preserve business content based on rules defined by the organization or mandated by regulations.

Livelink ECM – eDOCS™ manages enterprise content throughout its entire lifecycle with a focus on business processes, maximizing accountability while minimizing risk, and lower total cost of ownership (TCO).



Sales	Americas	Europe	Asia/Pacific	
www.opentext.com sales@opentext.com	United States 100 Tri-State Int'l Pkwy Lincolnshire IL 60069 Phone: 847-267-9330 Fax: 847-267-9332	Germany Technopark 2 Werner-von-Siemens-Ring 20 D-85630 Grasbrunn Phone: +49 89 4629 0 Fax: +49 89 4629 1199	United Kingdom Grosvenor House Horseshoe Crescent Beaconsfield Buckinghamshire HP9 1LJ Phone: +44 1494 679700 Fax: +44 1494 679707	Australia Level 12 65 Berry Street North Sydney, NSW 2060 Phone: +61 2 9026 3400 Fax: +61 2 9026 3455
North America Sales 1-800-499-6544	International Sales Toll Free: 1-800-538-7723 +800 4996 5440			

If you're an Open Text partner or customer, visit <http://online.opentext.com> for more information about this and other Open Text solutions.

Open Text is a publicly traded company on the NASDAQ (OTEX) and the TSX (OTC).