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Solution Overview

OpenText Document Training for Extended ECM

Managing the assignment and recording of SOP, policy or procedure training can be difficult and open to errors. Trying to demonstrate compliance with an ever-increasing number of regulations is time consuming when there are no digital training records available. An automated process to manage user training of company documents is a fundamental standard business practice.

OpenText™ Document Training for Extended ECM provides a complete solution to assign and track all user document training activities for all versions of documents. It is configured to automate training assignments using rule-based matrices for new documents or new versions of documents. Training Rules automate the assigning of folders of documents to users with specific roles within the organization. Easily ensure regulatory compliance by assigning and maintaining User Training records for all revisions of documents and demonstrate this using out-of-the-box reports.
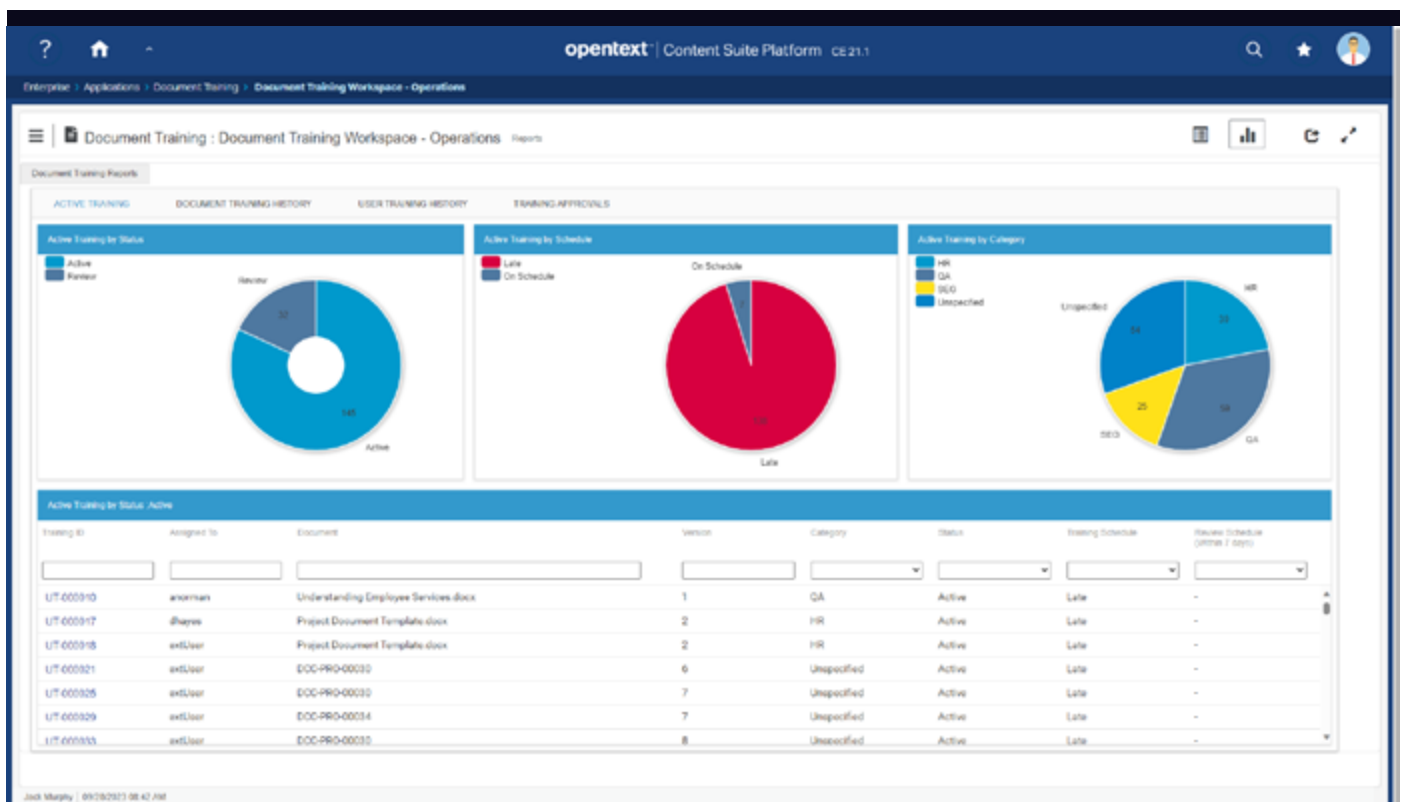
General

Single, centralized system: Stores and manages all document training assignments and records

- Save time with an automated document training solution and reduce human errors

Pre-configured workflows: Assign document training tasks to users via workflow assignments and capture read and understood declarations

- Ensure users are assigned appropriate training and minimize errors

Email notifications: Ensure that users are aware of all document training assignments

- Optimize the process, increase efficiency

Permissions based access: Configurable permissions provide user training record access to the relevant users including managers or HR

- Secure user training records and demonstrate training compliance

Compliance: Demonstrate and maintain employee document training regulatory compliance
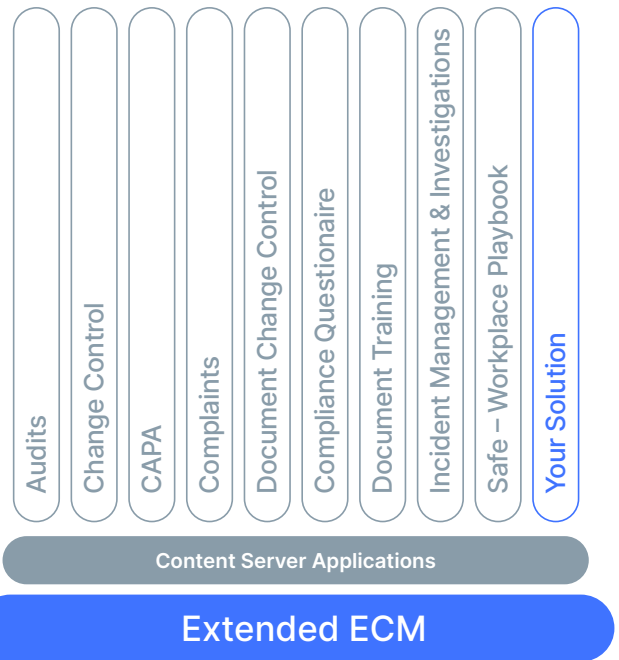
- Maintain and demonstrate compliance

Training Rules: Setup Training Rule on folders and documents to automate employee training assignments for new documents and new document versions. Safeguard regulatory compliance through group/department rules

- Save time and resources. Ensure compliance

Onboarding: Onboard new employees by adding them to specific training registries and roles.

- Onboard employees quickly

Audits | Change Control | CAPA | Complaints | Document Change Control | Compliance Questionaire | Document Training | Incident Management & Investigations | Safe – Workplace Playbook | Your Solution

Content Server Applications

Extended ECM

Reports and dashboards: Reports and dashboards provide easy to understand Document Training activities and statistics.

- Optimize decision-making, ensure timely training activities and address training issues quickly

Forms: Configure Training Process forms with a drag & drop UI

- Save time, eliminate need for developer resources

Integration: Works natively with Extended ECM and existing folders and documents, and with other OpenText Business Process Solutions, such as Document Change Control, or enterprise solutions such as SAP® through OpenText™ Extended ECM

- Improve collaboration across an organization and easily deploy to existing Extended ECM environments

Deployment

→ **Document Training Workspaces:** Deploy to multiple Business Workspaces distributing the management of training to different departments, sites and teams. Each workspace allows the configuration of workspace specific information, such as training rules and roles

- Ensure content control throughout the organization

Administration

→ **Training Plans:** Training plans result in a list of documents assigned to users for training. Training plans are determined by a combination of training roles and training rules

- Control assignment of training plans, increase efficiency

→ **Training Roles:** Training roles define groups of users, for example managers and analysts. Training rules assign training to users according to their roles

- Increase efficiency

→ **Workspace Training Rules:** Training rules are configured in Document Training workspaces. Rules are automatically run and assign document training tasks to users to complete. A Rule consists of:

Rule type — Rule types consist of watched documents and watched folders. A rule is automatically run if a new document is added to the folder or document version is added to any document.

Roles — The list of roles determines what users are assigned training for the documents referenced by the rule.

Training duration — Determines the length of time the user has to complete the training.

Retraining — This allows for the system to automatically re-assign training on a scheduled basis, regardless if a new version has been added.

Maintain compliance, ensure safety and product quality

Process

→ **Document Training approval:** Document training approvals ensure that any document training initiated by the system is approved before Document Training Event workflows are initiated.

- Reduce human errors, ensure compliance

→ **Document Training events:** Document Training events represent each user training for each document version. Each Document Training Event has a workflow that manages the training event and captures read and understood declaration.

- Increase efficiency, ensure compliance, maintain safety

→ **Document Training review:** Post user training management reviews can be used to confirm training effectiveness.

- Ensure continual development and user compliance and improve workplace safety and efficiency

User training

→ **Document Training record:** A Document Training record provides a list of all training activities on all versions of a document. Search and filters allow for specific information to be found quickly and easily

- Increase efficiency and demonstrate compliance

→ **User Training:** Workflow assignments allow users access the relevant document and confirm that they have read and understood the document. Email notifications include hyperlinks to training assignments, which simplifies training task access and completion

- Increase efficiency, maintain compliance

→ **My Training:** Provides user access to all current active and completed training for each version of each document

- Provide easy access to training assignments and historical training activities and demonstrate compliance

Notifications

→ Standard Extended ECM notifications are supplemented with system generated email notifications alerting users that they have active or overdue training assignments

- Ensure completion of training

Reports and compliance

→ Out-of-the-box reports provide a full audit trail of all assigned Document Training tasks.

- Improve decision-making, minimize training issues

→ Compliance reviews are made easy using reports that show training assignment completions based on document versions or by user

- Maintain compliance. Easily demonstrate training trends

→ Ensure all Document Training in your organization occurs in a controlled manner to achieve best practices and regulatory compliance

- Improve governance, maximize employee efficiency and ensure employee safety
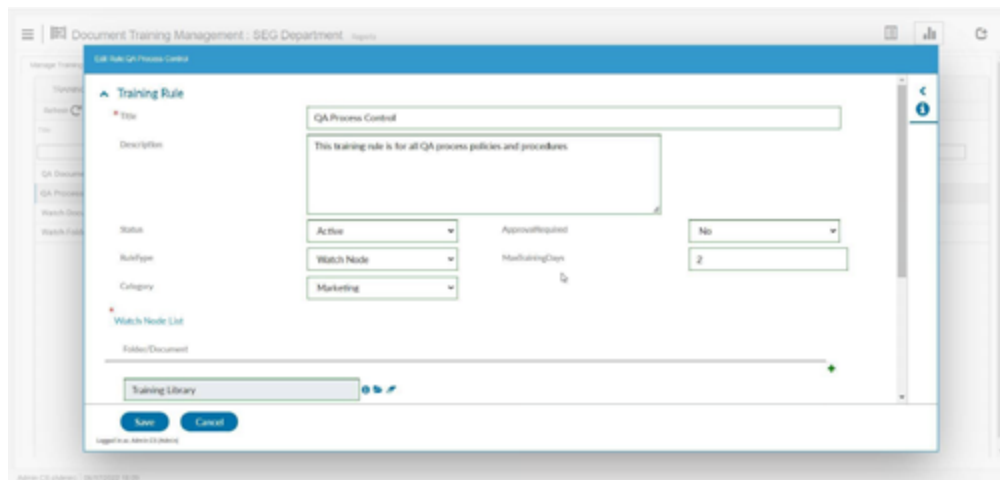
Integration and deployment

→ An add-on Solution that seamlessly integrates with Extended ECM

- Deploy easily and benefit from existing content

→ Extended ECM experience is not required as notifications provide a direct link to workflow assignments. The OpenText Business Process Solutions have an intuitive interface, ensuring business administrators can easily administer the solution

- Easy to deploy and use

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The OpenText Business Process Solutions for Extended ECM include Audits, Change Control, CAPA, Complaints, Compliance Questionnaire, Document Change Control, Document Training, and more. These solutions provide linked business processes with content management, allowing a real-time view of all business metrics and trends across an organization, while maintaining data and document security.

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