OPENTEXT™

OpenText™ eDOCS for Microsoft® SharePoint®

Deliver the ideal SharePoint user experience with robust document and records management capabilities to manage business content throughout its lifecycle

Many organizations want to maintain SharePoint as their primary user interface for sharing and collaboration, but they want to use eDOCS as their back-end document management system. OpenText eDOCS works seamlessly with Microsoft SharePoint to enable this scenario, consolidating decentralized SharePoint content into eDOCS for exceptional security, compliance, and lifecycle management.

Improve Content Management across the Organization

Today, it is estimated that one in two organizations use SharePoint. Whether used as an intranet or an extranet, these organizations typically deploy SharePoint in a decentralized, departmental manner—creating a user-friendly portal for document sharing and collaboration related to a specific purpose, project, or group.

While SharePoint excels as an easy-to-use portal interface, it lacks robust document and records management capabilities. Over time, as SharePoint implementations multiply across the organization, it becomes difficult to adequately manage and secure content residing within these discrete "silos." In addition, as projects are completed and organizations change, information remains orphaned—ungoverned through to the end of its lifecycle. Proliferating SharePoint content left unintegrated and unmanaged can hinder productivity and increase security, compliance, and eDiscovery risk for the organization.

eDOCS brings control to this situation, capturing SharePoint content into a secure repository where it is centrally managed in accordance with regulatory and business requirements. It helps companies develop comprehensive compliance and governance solutions for electronic content while ensuring litigation readiness and supporting discovery processes. In addition, eDOCS boosts organizational efficiency and productivity, helping users quickly find and access the information they need for day-to-day business operations.

SharePoint and eDOCS: Better Together

SharePoint and eDOCS are perfectly compatible, complementary, and deliver excellent synergies when deployed together. SharePoint makes it easy to create and populate sites with business content, encouraging and facilitating collaboration internally across applications, departments, job functions, and externally with other constituents. eDOCS supports those collaborative uses, capturing content in a centrally-managed system where records remain organized, secure, and compliant.

SOLUTION SUMMARY

eDOCS for Microsoft® SharePoint® brings robust document and records management to content published on SharePoint intranet or extranets, making sure the most current document versions are available for sharing and collaboration. The solution captures decentralized SharePoint content in a centralized eDOCS repository for lifecycle management, records management, and archival. In addition, documents can be synchronized such that any changes made to the version in eDOCS are automatically published to the version in SharePoint, and conversely, new versions created in SharePoint are automatically archived in eDOCS. This brings simplicity and governance to SharePoint sharing and collaboration.

BENEFITS

- *A single user interface for business content*
- *Governed SharePoint content*
- *Automatic archiving*
- *Support for collaborative workspaces*
- *Multiple ways to access content*
- *Migration of SharePoint content into eDOCS*
- *Tamper-proof storage with audit trail*
- *A single version of the truth*
- *Ability to integrate with other ECM systems*

Integrated Solution Components

eDOCS for Microsoft SharePoint provides a scalable, integrated content repository that extends comprehensive lifecycle management to all the SharePoint content stores across the organization. The solution consists of four different products that can be used separately or together:

OpenText™ eDOCS DM Extensions for Microsoft SharePoint

eDOCS DM Extensions for SharePoint provide a series of Web Parts and App Parts for building a SharePoint Portal interface into OpenText Document Management, eDOCS Edition (eDOCS DM)—allowing a SharePoint user access into one or more eDOCS libraries. It also provides eDOCS Profile and Full-Text search capability from within SharePoint. Configure the Web Parts in a variety of ways to optimize how content displays to the user, including pre-populating relevant content. Deploy the Web Parts on-premises or use the eDOCS App Parts for SharePoint On-Premises or Online.

OpenText™ eDOCS Integration for Microsoft SharePoint

eDOCS Integration for SharePoint provides all of the functionality of the DM Extensions for SharePoint, plus an additional feature set that includes publishing, archiving, and bi-directional synchronization of content between SharePoint and eDOCS. The additional features provide deeper integration between eDOCS and SharePoint, enabling you to move, copy, and synchronize documents and metadata in either direction.

OpenText™ eDOCS Synchronization for Microsoft SharePoint

Rather than relying on users to store and save documents, eDOCS Synchronization for SharePoint lets you automatically synchronize entire directories between SharePoint and eDOCS and keep both replicated directories completely up-to-date. The system makes it easy to configure rules to manage folder conflicts, map metadata between systems, and sync permission changes.

OpenText™ Content Migrator for eDOCS

Content Migrator for eDOCS allows you to move documents quickly and efficiently between OpenText eDOCS and SharePoint content repositories, as needed, to serve the business need.

eDOCS for SharePoint Benefits

A Single User Interface for Business Content

Use SharePoint as the primary interface for business information, with eDOCS on the back-end ensuring all SharePoint content is secure, compliant and remains managed throughout its lifecycle. Easily search, edit, manage, share and collaborate on documents in the eDOCS repository from within the SharePoint user interface.

Governed SharePoint Content

Ensure SharePoint documents are secure, easy to access, and governed throughout their lifecycle in accordance with internal policies and external regulations. When content falls into disuse as projects are completed or put on hold, content lifecycle management is in place:

- Capture documents into eDOCS with a single click from the SharePoint interface

- Store SharePoint content alongside other documents, email, correspondence and information; apply metadata to enable instant retrieval for future use

- Map SharePoint Document Library attributes to eDOCS Profile fields; enable processes to be applied to specific document types

- Easily apply records management classifications to documents as they are saved into the eDOCS repository

- Classify documents as records automatically or interactively on a case-by-case basis, and configure classification rules for specific uses

Automatic Archiving

To reduce governance and compliance risk, automatically synchronize documents within SharePoint into eDOCS. Automatic archiving to eDOCS ensures that critical content is consistently governed and compliant.

Support for Collaborative Workspaces

To ensure the SharePoint documents shared with staff (intranet) or published externally (extranet) are the latest versions, set up simultaneous coexistence of documents between eDOCS and SharePoint. Revise documents in eDOCS then automatically share/synchronize them with the mirror version in SharePoint. Alternatively, for a single version of the truth, replace the SharePoint file with a stub or links to the eDOCS version.

Multiple Ways to Access Content

Secured with a single sign-on, SharePoint users can access eDOCS content in a variety of ways. These methods include a unique "workspace" view of all eDOCS repositories via a "library tree" to see quick searches, workspaces, folders, remote libraries, checked out documents, template documents, dynamic views, and recently edited documents. Users can also access information through a "profile search" to get the documents they need based on specific criteria such as document number, author, creation date, or keyword(s).

Migration of SharePoint Content into eDOCS

When a SharePoint project is over, you can quickly and easily move project documents into the eDOCS repository for lifecycle management.

Tamper-Proof Storage with Audit Trail

eDOCS provides robust authentication capabilities, including time stamps and system signatures, to prove that enterprise content is genuine and stored accurately.

Ability to Integrate with Other ECM Systems

Make the most of existing investments by accessing advanced eDOCS ECM functionality—including document management, workflow, secure external collaboration, and reporting.

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