

■ **Product Overview**

# Open Text eDOCS™ RM

## The Business Challenge

Today's governance culture, with its mounting set of regulatory bodies, legislation, and standards, creates risk for any organization that does not manage business-critical information properly. The consequences of failure to adequately mitigate this risk can be dire as evidenced by the string of recent scandals that have shaken public trust, not to mention the fate of several major corporations.

Organizations today—especially those in financial services, insurance, health sciences, manufacturing, and government—face increasing regulatory pressures surrounding business information. Paper and electronic documents of all types must be declared as records, classified, indexed, organized, retained, and made retrievable to ensure compliance. Yet organizations today face escalating risk due to their inability to accurately and effectively account for required records.

Complicating matters further, e-mail, instant messaging logs, discussion threads, and rich media are increasingly regarded as records. When these and other emerging forms of information and communication are used in conducting business, organizations must retain them as records to avert potential disputes and proactively address looming regulations.

Progressive organizations are formalizing records policies and are looking to integrated records management systems to protect, organize, and manage the entire lifecycle of critical content. Advanced records management eliminates redundant information of all types, reduces time spent locating records, meets complex regulatory provisions, and mitigates the risk of litigation or fines and other penalties.

## Open Text eDOCS™ RM

eDOCS RM provides a completely secure, feature rich, standards-compliant records management solution that works in tandem with the entire Open Text eDOCS™ Suite. When combined with records management methodologies and best practices, eDOCS RM helps establish comprehensive lifecycle management of paper and electronic records. It provides records managers with an environment for nurturing better relationships with enterprise knowledge workers and the ability to enforce guidelines and policies while maintaining complete control over the records management practice. It provides a fluid process for the protection of content assets against risks such as litigation or disaster while meeting complex regulatory requirements.

## Features

<b>Compliance Management</b>	Virtually all industries are affected by regulation or legislation that requires record management policies be put in place. Open Text offers a records management solution that is Department of Defense 5015.2 certified. From clinical data, to test protocols, to e-mail and instant messages, eDOCS RM provides long-term access, audit and retention control of all content in compliance with regulatory and legislative requirements such as the U.S. Department of Defense 5015.2, Sarbanes-Oxley, SEC provisions, HIPAA, The National Archive standard (UK), DOMEA (Germany), the European Union's MoReq Specification, VERS (Australia), ISO 15489, Section 508 and FDA 21CFR11.
<b>Mitigating Risk Exposure for All Types of Records</b>	eDOCS RM allows organizations to classify not only traditional content as records, but e-mail, instant messages, and rich media as well. This reduces risk exposure for organizations, averting the consequences of failure to comply with established retention policies, and reduces the costs associated with a discovery order.
<b>Easy to Learn and Use</b>	Business users carry out records management tasks from within commonly used authoring and productivity tools. This reduces training costs and speeds user acceptance and enrollment in the organization's records strategy.

## Solution Highlights

### For End Users

- Simplifies record capture and creation with easy association of retention codes
- Allows workers to create records without leaving familiar desktop applications
- Delivers faster access to consolidated content and records management resources

### For Administrators

- Eases administration burdens through a consolidated records and document management platform
- Speeds enterprise installations with web-based Deployment Tool that configures the user's document and record management experience
- Straightforward creation of records policies and the control to enforce them

### For Organizations

- Improves accountability and minimizes litigation risk
- Reduces costs associated with handling of paper-based and electronic records
- Increases productivity and reduces training requirements by leveraging familiar web and Windows® interfaces
- Improves services provision to customers or constituents



<b>Productivity Enhancements Across the Enterprise</b>	By enabling business users to associate retention codes to records, records managers can spend more time on ensuring corporate records policies are communicated, controlled, and enforced rather than on filing records. Business users save time by easily searching for records instead of waiting for them to be delivered by the records department.
<b>Comprehensive Security Model</b>	Throughout the content lifecycle, a dynamic evolution of access rights is granted, revoked, and fine-tuned to balance knowledge management needs with compliance and information safekeeping requirements, and eDOCS RM is designed to seamlessly manage this custodial chain of access. Records are categorized in a taxonomy-based file plan with security settings defining access and management permissions, and granular “functional” permissions enable centralized policy definitions and delegated stewardship of content assets.
<b>Assuring Authenticity of Fixed Content</b>	Certain regulations not only require organizations to retain any corporate records relating to correspondence by brokers or dealers, but also specify acceptable storage mediums. eDOCS RM integrates with EMC Centera to provide a regulatory approved solution for the storage and retention of fixed digital assets.
<b>Reporting</b>	Integration with Livelink ECM – Business Intelligence™ provides a variety of preconfigured reports that provide snapshot views of information relating to vital records or items ready for disposition or destruction. Records managers and system administrators can easily design tailored reports for use across the organization and for in-depth analysis as required to have high tolerance for “long thin wire” transactions. Also it supports resumption of sessions after a signal interruption so that users don’t have to begin their transmissions over again. Requests are designed to be lightweight and to scale easily.

**“The Internet age of lightning-fast global communication has opened a ‘Pandora’s box’ of new liabilities. A lifecycle approach must be used to manage the information onslaught created by digital documents.”**

Gartner, Inc.

Open Text eDOCS RM Checklist
• Single shared repository for management of in-process and final records of any physical or electronic media type
• Designed to help organizations meet rigorous legislative and regulatory requirements, including Sarbanes-Oxley, SEC, NASD, HIPAA, PIPEDA, and FDA
• Create, categorize, manage and find records from content authoring and e-mail tools, Web browsers, and mobile devices
• Extensive e-mail integration to capture messages, attachments, and threads, with EMC Centera support to preserve message authenticity
• Secure records with extensive security features that defend against unauthorized access at folder, document, group, user, and file plan levels
• Suspend records from lifecycle processing to meet discovery orders and assist in regulatory audits
• Event notifications of record activities available from e-mail, instant messaging, and mobile devices
• Extensive reporting tools built-in to track content assets and administrative actions throughout the record lifecycle

## OPEN TEXT

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