

# Building a Foundation for Information Governance

## An Enterprise Vision for Critical Knowledge Assets

March 2009

### **Abstract**

All businesses, regardless of size, location or market, require and use content—the material that constitutes documents, publications, and other information—from many sources in their day-to-day operations. As the volume and complexity of this content increases, so does the need to understand and manage it. Open Text's Content Lifecycle Management solutions provide the necessary foundation for an enterprise-wide strategy for information governance.



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## Introduction: Information Governance and Enterprise Content Management (ECM)

Business today relies on three fundamental elements: people, process, and content. Ultimately people are the most crucial of the three. Without human language, curiosity and desire to improve material and social circumstances there would be no need for process and content would not be produced. This is not a new observation. That humans are uniquely furnished with the faculty of language and are thus compelled to form social, commercial, and political associations can be traced back thousands of years<sup>1</sup>. Language and words are tools used to create common goals, bonds, and forge relationships to improve our existence.

These social, commercial, and political associations that have emerged to serve the needs of people, need content and process to stay agile, relevant, and exist inside a framework of rules and acceptable practices. It no longer matters if these communities are physical or virtual—it is the environment in which we live and work. The capture, distribution, consumption, and protection of information across a broad range of physical and digital forms have become requirements to stay in business.

Information Governance has emerged as a term to describe "the collection of decision rights, processes, standards, policies and technologies required to manage, maintain, and exploit information as an enterprise resource."<sup>2</sup> In the knowledge economy, businesses that rely on innovation, technology development, patents, regulated products, and creative arts must protect their core assets just as more traditional companies would protect their plants and property. Engineering and scientific expertise, crystallization of reusable best practices, and innovative market strategies are direct contributors to top-line revenue. Organizations that are exploring a corporate information governance strategy are seeking to guide how the managers make decisions about content stewardship. They understand the need to align organizational technology and business objectives and aim to articulate this vision to employees, key partners, and external stakeholders.

Content-centric best practices to help meet compliance and risk mitigation mandates imposed by law, regulators, or internal quality standards are

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<sup>1</sup> Aristotle, *Politics*.

<sup>2</sup> Gartner Research Note, May 18, 2006. "Governance is an Essential Building Block for Enterprise Information Management," David Newman and Debra Logan. p. 3.



complemented by a keen focus on developing ways to capitalize on the kinds of productivity and efficiency gains that grow out of an asset-management approach to corporate content. Enterprise Content Management solutions can help companies deliver a governance program to deal with corporate information, the consumers and creators of that content, in the context of real business processes.

Enterprise Content Management gained traction as a distinct technology category circa 2004. Although crystallized by the first Gartner “Magic Quadrant” for ECM, Open Text had embraced and adopted this category description for years before broad analyst adoption. Open Text holds the leadership position in the Enterprise Content Management software space and continues to be an innovator, pushing the boundaries as content types change. They are shaping how the market evolves and the ways in which technology brings people, process and content together to serve specific business imperatives.

Visionary customers, industry analysts, and technology vendors accepted this evolving vision of ECM. It was time to move beyond niche point-solutions, specific to one department or function, and look to integration and interoperability to better serve the people, process and content needs of business. Since the establishment of ECM as a category, Open Text has demonstrated strong leadership positions<sup>3</sup> in completeness of technology portfolio, corporate vision, and ability to execute.

The broad offering Open Text delivers under the Enterprise Content Management portfolio includes the foundational components of document management, records management, imaging, content-centric collaboration and workflow, and Web content management. Open Text specifically pushes the ECM envelope, with key offerings to extend into business intelligence and reporting, digital asset management, intelligent archiving, and deep vertical and horizontal applications to integrate into the most strategic areas of the enterprise ecosystem: email management, applications for SAP, SharePoint and Oracle, eDiscovery, and solutions for industries in Energy, Utilities, Public Sector, Legal, Life Sciences, and Education.

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<sup>3</sup> Forrester Research, Forrester Wave, [http://www.opentext.com/download/livelihood/download.html?path=corporate/analyst\\_coverage/forrester-vendor-summary-otleads.pdf](http://www.opentext.com/download/livelihood/download.html?path=corporate/analyst_coverage/forrester-vendor-summary-otleads.pdf) and Gartner, Magic Quadrant for ECM, <http://www.opentext.com/news/pr.html?id=1933>



## Getting Started with ECM

### An information governance foundation: Content lifecycle management

Corporations and public sector organizations look to deploy Enterprise Content Management solutions to establish an information governance strategy for their critical content. But customers often ask—where do we start? How do we articulate and execute on a strategy for our own enterprise content? How can we address the fundamentals? How do we balance regulatory compliance pressures with a need to improve productivity? How can we make the right technology and change management investments to demonstrate both tangible cost savings as well as softer returns?

Open Text has developed specific solution offerings designed to meet these essential needs—user productivity, business agility, cost, and risk mitigations—that are common to the enterprise. Content Lifecycle Management brings together the key elements needed to put an organization on the right path to a governance strategy and ECM vision.

Senior management necessarily scrutinizes technology investments. Software acquisition at the enterprise level can no longer be done purely by IT; nor can it be driven by requirements only of one department or business unit. Technology investments are increasingly required to serve three fundamental needs: to control costs and risks, to enable business agility, and to empower the business users. The broad solution portfolio from Open Text addresses all three of these pressures, but organizations need to start with a solid foundation of ECM fundamentals.

The challenges surrounding effective content management strategies are abundant: ever increasing volumes of information, fractured systems that have been adopted over time, merger and acquisition activities resulting in disparate and disconnected IT systems, all against the backdrop of complex regulatory and legislative mandates that influence how organizations view and manage business content.

Companies are subject to regulations that require the protection and preservation of content. They must also show adherence to approved retention policies, as well as privacy and data protection regulations driven by the industry and jurisdiction in which they do business. Failure to meet these external obligations exposes the organization to possible financial penalty, loss of reputation, and legal liabilities that affect business operations.

And the way that information workers use and access content continues to change: they are more mobile than ever and work with content across a variety of systems and devices. Ensuring secure access to accurate content on demand is critical to achieving corporate goals of productivity and efficiency improvement.

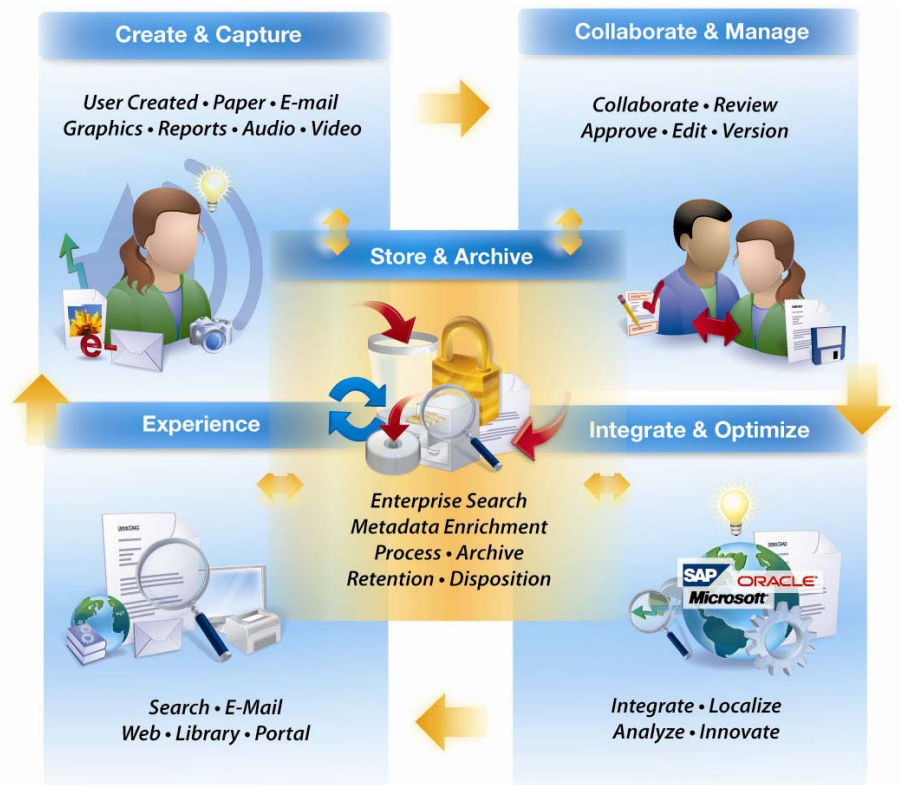


As we approach the second decade of the 21<sup>st</sup> century, the public sector and many businesses across the G8 nations are seeing demographic shifts. It is recognized that an impending Baby Boomer retirement wave could result in a brain drain and loss of corporate memory. Best practices, corporate culture, years of accumulated implicit knowledge, and experiences are at risk. Preserving intellectual capital and expertise as a competitive advantage is vital in today's dynamic and competitive business climate.

Critical to the success of an ECM deployment is engaging people as they use the content they create and receive as part of a business process. Understanding how content flows through an organization—who needs it, what applications are used, what are the stages of its evolution or approval, where does it go when finished, who cares about its preservation or destruction—these questions need to be part of an ECM deployment. User engagement and participation in the process is critical to success.

Content Lifecycle Management addresses the fundamental building blocks of an ECM strategy: document management, records management, document-centric workflow, archiving, imaging, and application integration to many mainstream content authoring applications. These integrated components allow an organization to implement true end-to-end solutions addressing the three universal requirements: end user empowerment, business agility, and cost and risk reduction.

Figure 1: Content Lifecycle Management supports all of the five key stages of content flow throughout the organization



Content Lifecycle Management delivers an integrated set of ECM tools to support the five key stages of the life of content: Create and Capture, Collaborate and Manage, Integrate and Optimize, and Experience—underpinned by world class Retention and Storage Management.

Organizations with particular needs to extend this core offering can easily do so with integrated extensions to support enhanced collaboration and web content management, digital and rich media management, reporting and analytics, ERP solutions, portal integration, as well as the rich application integration layers delivered by the Open Text Content Services suite.



## Overview of the Core ECM Components

### Empowering information workers: Document management

Document management and records management form the cornerstone of this ECM foundation bundling. Designed to offer a secure and centrally managed repository for both work-in-progress and final output content, the fundamental tools include full text and metadata search, security, retrieval, version control, taxonomy, metadata categorization, as well as team and personal workspaces.

Organizations benefit from document management particularly when the requirements are driven by user empowerment and business agility needs. Document management also provides the framework for introducing the next layer of control and risk mitigation with fully integrated records management.

An enterprise can make the case for document management if the answer is 'yes' to any of these questions:

- Is there confusion over which document is the latest or approved version?
- Are business decisions made with incomplete or inaccurate information because it takes too long to locate the right content?
- Are employees frustrated or spending too much time searching multiple file shares or other storage locations?
- Do employees recreate or feel compelled to redo work because it is difficult to find? Are employees even aware of previous work done by colleagues or other business units?
- Are delays in information access and efficient content distribution causing bottlenecks and slowing completion of projects?
- Are you losing opportunities and market share, or not responding rapidly to customers because customer-facing staff do not have timely access to relevant information?

The document management offering from Open Text provides a secure repository for content of all types and formats—office applications, email, graphics, CAD drawings, images and renditions, and an increasing range of new object types as organizations adopt more Web 2.0 collaborative tools inside the enterprise. Check-in/check-out, version control for simple and compound documents, audit trails, metadata categorization, comprehensive search, user-, group-, and role-based access controls are all elements of the document management core offering, delivered through Web browser, Microsoft Office application, or Windows Explorer interfaces to meet a range of user preferences.

Users and administrators can create metadata, folder structures, and taxonomies to meet both personal and enterprise organizational needs. Easy to understand toolbars, search capabilities, navigation panes, and document-centric function



menus deliver rich and intuitive search and navigation features to both casual document consumers and more demanding content creators and reviewers.

## Improving business agility: Workflow

Document management also facilitates collaborative work, allowing information workers to rate, recommend, subscribe to notifications, and share links to key content with their colleagues. A core feature of the document management offering is a content-centric workflow tool, which allows both structured and ad-hoc routing of documents for a variety of approval, review and feedback processes. Using simple graphical tools to map out the process flow, authorized users and administrators can automate routine activities, streamline the movement of content across teams, show measurable cost and time savings by eliminating redundant stages, automate escalations, relieve the burden of using email to transport duplicated attachments, and provide insight and transparency into process bottlenecks and missed deadlines.

Organizations can benefit from the workflow capability of Content Lifecycle Management if:

- Productivity improvements can be achieved by streamlining routine tasks with assigned steps, instructions, structured approvals for parallel or serial workflows for either users or groups
- Complex procedures can dynamically spawn new workflows or tasks based on specified conditional rules
- Compliance or best practices requirements need to preserve previous versions of workflows—including audit trails and permissions
- Corporate management or operations need to be proactively notified if deadlines are missed or when tasks are completed

## Reducing risk: Records management

Records management is the next logical extension to document management: enriching the metadata on content, enhancing security, extending the corporate repository to physical objects and storage space management, and allowing scheduled archiving, movement or destruction of content based on corporately approved rules and event triggers.

Some organizations may choose to deploy the records management module first, particularly if the largest source of pain for the enterprise is risk and cost management of legacy paper content. Highly regulated industries with rigid external compliance mandates, public sector, or paper-intensive processes can quickly benefit from the implementation of Open Text Records Management as part of a governance strategy. In these cases, extending these capture, control and preservation requirements to a broader range of electronic work-in-progress content is what then drives subsequent adoption of the document management offering.



Successful deployment of a records management initiative must include strong direction from internal business managers and corporate legal. Thinking about records management as purely a technology problem is unlikely to address the real business risks that could result from inappropriate destruction or retention policies. It's the business that faces compliance issues, and business users that generate the content that needs to be managed as a record. The deployments that are most successful are those that bring a cross functional team into the planning stages: business users, legal, IT, records or knowledge managers backed up with executive sponsorship and funding.<sup>4</sup>

Consider the following questions and assess if your organization faces any of these common challenges:

- Are you a publicly-traded organization, do you work in the public sector, or are you subject to external health, safety, financial, or environmental disclosure regulations?
- Do you operate in a jurisdiction or industry sector that is litigious?
- Do you need to apply holds to any of your corporate content?
- Does high-value intellectual property, digital assets, patents, designs, blueprints, scientific or other research contribute to the valuation or revenue of your business?
- Is capturing corporate memory, best practices, or organizational knowledge strategic to keeping your business running smoothly during periods of staff turnover, retirement, elections, or mergers and acquisitions?
- Do you have paper, boxes, or other physical artifacts that require preservation, easy retrieval, or specific storage rules?
- Are users confused by what should or should not be deleted? Stored offline? Duplicated?
- Are users inventing their own ad hoc practices for email vs. office documents vs. other forms of content?

## Reducing storage costs: Intelligent storage management

Successfully deployed document and records management deployments will quickly demonstrate return on investment with improvements in user productivity—search, retrieval, re-use—in addition to offsetting network traffic and email inbox overload. Providing users with the opportunity to collaborate in shared workspaces means avoiding incessant duplication of documents across

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<sup>4</sup> Useful guidelines, standards and best practices have been published by organizations such as ARMA. <https://www.arma.org/standards/index.cfm>

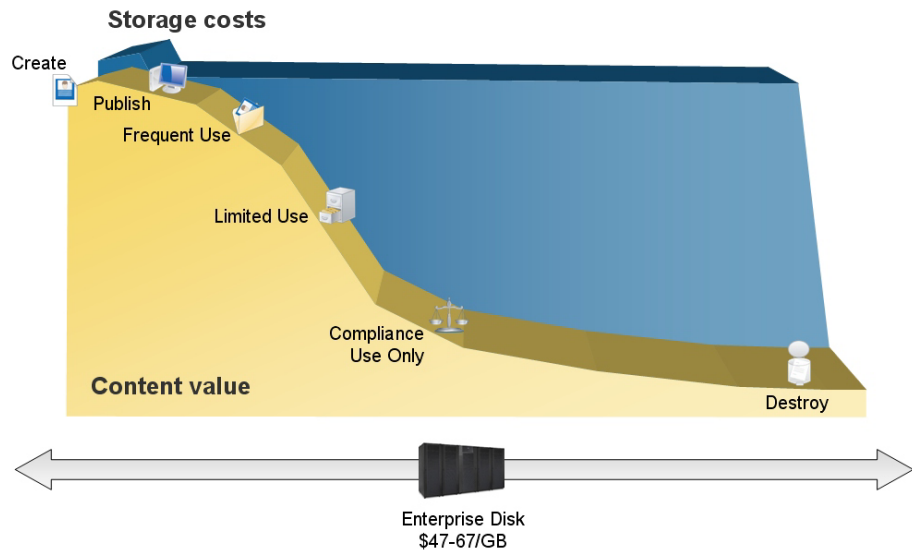


folders, shared and local drives. Another key source of cost reduction, unique to Open Text, is fully integrated content archiving. As the document and records repository grows, or as IT reviews storage costs across the enterprise, the intelligent archiving component brings solid cost saving opportunities to the table.

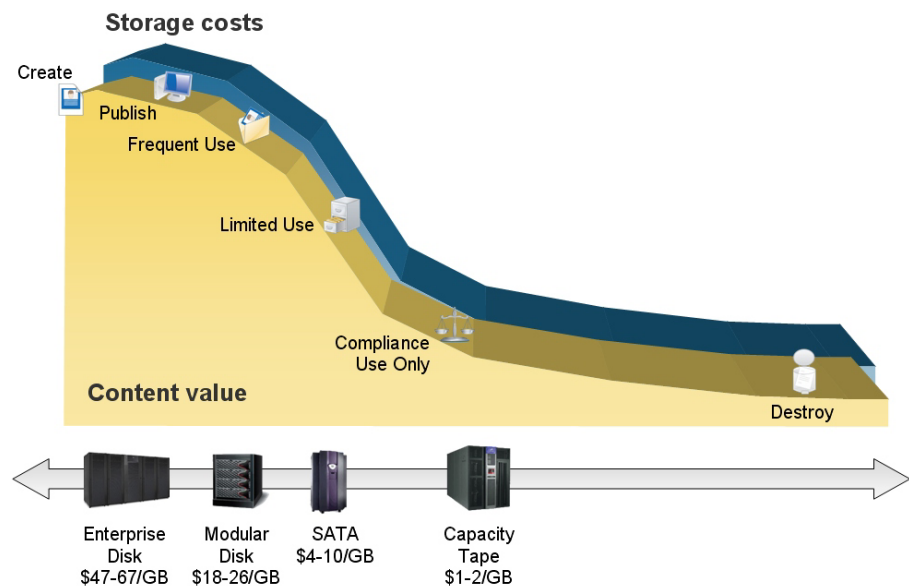
As content ages or changes status, it is typically used and retrieved less frequently. Yet few organizations have solid insights into how often content is used, or what proportion of content is still viewed after six months. The Intelligent Storage Management capabilities offered by the archiving component of Content Lifecycle Management gives IT the flexibility to move and store infrequently used or less critical content to more economical storage devices. High value and frequently used content can be directed to premium storage devices for high accessibility and rapid retrieval.

Stored content has a cost—the hardware devices, regular backup, and administration overhead. Intelligent Storage Management offers the ability to reduce the cost and burden of content storage as its value or usefulness decreases. The ability to synchronize content value with vendor-agnostic storage virtualization opens the door to new ways to manage IT costs. Intelligent Storage Management allows a liberal mix of storage technologies from a diverse group of storage vendors to be combined into one or more logical enterprise archive repositories. The storage of inactive or infrequently used content can be directly tied to records management storage rules, and item movement can be triggered by metadata or other key lifecycle events.

*Figure 2: Without Intelligent Storage Management, content on tier-one storage carries a persistently high cost, even as its usefulness declines over its lifecycle.*



*Figure 3: With Intelligent Storage Management, content is moved to less expensive devices as the content's usefulness declines over its lifecycle.*



Your organization can benefit from real cost savings with the Intelligent Storage Management capabilities of integrated archiving if:

- Existing in-house storage is approaching the terabyte level
- Current tier one storage holds content that is infrequently retrieved, or coming close to its approved destruction date
- IT management is not able to meaningfully exploit less expensive tape or disk storage devices
- Business needs or regulations demand that content has long-term availability and readability requirements
- Critical information needs enhanced protection with auditing, controlled deletions, encryption, and access controls
- Disaster recovery and business continuity planning must extend to electronic corporate content

## Reducing costs and preserving corporate memory: Imaging and paper capture

The paperless office is still just a dream for most organizations. Many business critical processes still rely at least in part on paper—accounts payable, contracts negotiation, order management, inbound correspondence, expense claim reimbursements, among others. While paper has a tangible quality that makes it attractive for on-the-road portability and reading, the effectiveness of relying on physical forms, letters, and receipts is not ideal. This is especially true when users get into the habit of duplicating paper content, wasting resources and time,



and creating the opportunity for information loss through improper storage, disposal, or handling habits.

Content Lifecycle Management includes integrated imaging to support a range of document capture scenarios for high- and low-volume requirements. Integrated with the workflow component, organizations can use barcodes, Optical Character Recognition (OCR) and automated metadata collection and categorization to streamline the capture process and ensure valuable content is properly stored and organized in context with related electronic content.

Converting paper documents into industry-standard electronic image formats can reduce costs, as the need to store non-essential paper or copies of convenience is eliminated. High-value paper records with evidentiary or historical value can be scanned and carefully preserved, allowing the electronic copies to be more widely viewed by a larger group of users safely and securely. Imaging also allows organizations to easily match scanned content with related information created electronically in any number of applications—email, office suites, CAD systems, or ERP applications such as SAP and Oracle—associated with meaningful metadata such as case or customer number. Familiar user actions such as sticky-note comments, annotations, redlining, and other markups are available electronically.

Your organization can benefit from the imaging capability of Content Lifecycle Management if:

- Warehouse or file room costs are high or rising due to storage of paper-based records
- Retrieval of paper-based records is labor-intensive or slows down business processes by creating bottlenecks in the flow of work
- Historically valuable physical records are at risk by handling or movement
- Business continuity or disaster recovery planning dictates that paper cannot be a single point of failure
- Paper records contain sensitive personal, financial, medical or commercial proprietary information that requires specialized storage, structured disposal, processing, or destruction methods
- Information is needed across a geographically dispersed or cross-functional team and traditional fax, courier, or mail methods are slow, inefficient and costly

## Users working the way they want to work: Application integration

Organizations can accelerate the value of their Content Lifecycle Management deployment by using off-the-shelf application integration offerings to extend content capture and consumption across common business applications.

ERP applications often set the framework for process-intensive business transactions. SAP, for example, has allowed organizations to streamline



processes and consolidate cost centers and procedures. Bridging the gap between ERP transactional applications and the unstructured document-centric content that these applications need is a key offering of Content Lifecycle Management. Integration and linking capabilities provide single point of access for users to the business content they need, across information sources, and without requiring them to perform multiple searches or resort to paper procedures.

A strong integration with the popular Microsoft Office desktop suite eases adoption and minimizes retraining when Content Lifecycle Management is deployed to information workers. Users often spend a large proportion of the work day inside their email applications. Integrations use familiar and intuitive email notifications and connect the inbox and common document management objects such as folders, projects, and compound documents. Integration between mainstream office suites and document management functions mean users can open and save documents directly from the repository. Using Windows Explorer, users can drag and drop documents and folders between their desktop and the repository. For users who frequently travel or take their laptops home evenings and weekends, offline support ensures work done away from the corporate network is synchronized with the repository to ensure documents are up-to-date and correctly versioned.

Administrators can also benefit from the extensions and integrations that are part of Content Lifecycle Management. The requirement to allow enterprise and extranet applications to synchronize their users and groups with a central directory service, and provide network users with single log-in, is critical to deployment success. Organizations can administer users and groups in a single directory, and use administrative tools to synchronize information with the centrally maintained directory service. Users can log in transparently, and are not required to enter their usernames and passwords multiple times.



## Building on the Information Governance Foundation

Open Text's Content Lifecycle Management solutions have delivered success and shown measurable value to organizations facing a broad spectrum of content-centric business problems. The fundamentals of document management, records management, intelligent archiving, integrated workflow, and imaging offer a rich set of user-friendly tools to push and pull content to the right people, at the right time, in the context of their work. Content Lifecycle Management provides the solid underpinning to any enterprise needing to build a governance strategy for the knowledge assets it creates and receives.

But we know that different companies have different pain points when it comes to controlling and accessing mission critical information. The information governance strategy needed by one organization will be different than that of another. Where compliance and retention mandates may challenge a regulated industry, knowledge management, and corporate memory preservation may be top of mind for another. Managing, maintaining, and exploiting corporate content will be prioritized differently in different corporate cultures.

Customer and market analysis, however, reveals three common business drivers of ECM adoption: the need to empower information workers, the need to control costs and risks, and the need for business to be agile in an increasingly competitive landscape. Open Text has a range of ECM solutions to extend beyond the Content Lifecycle Management foundation to meet these three key requirements.

### Empowering information workers further: Extending collaboration and opening the door to Enterprise 2.0

Businesses depend on effective and timely communication with customers, suppliers, and among employees. For companies with specific user productivity and knowledge sharing requirements, a natural extension to Content Lifecycle Management is Extended Collaboration. Connecting people in a real-time, project or team-based workspace, to circulate ideas, experiences, content, and best practices is an effective use of collaborative technologies. Whether driven by the geographic distribution of teams, by knowledge management practices, or because increasingly technically savvy business users prefer the ease of use offered by Web 2.0-inspired tools, Open Text delivers fully integrated and intuitive extensions to the ECM foundation delivered by Content Lifecycle Management.

As organizations begin to explore and adopt more of collaborative Web-based tools inspired by personal use—wikis, blogs, discussion forums, real-time chat—Open Text has proactively stepped ahead in order to deliver to the evolving Enterprise 2.0 world the same market-leading risk and cost mitigation offerings that are used with more traditional content and communication types. Records management-friendly blogs and wikis, SharePoint collaboration sites, real-time



team chat rooms, and other Web 2.0-inspired tools can all be deployed safely and securely, with integration back to the underlying ECM governance foundation laid by Content Lifecycle Management.

## Accelerating decision making for agility and competitive advantage: Analytics and extended automation

Content that is managed, secured and tagged with corporate or user-driven metadata can deliver new perspectives on how information is created, used, and collected during business activities. Fully integrated reporting is a natural extension to a Content Lifecycle Management deployment.

System administrators, information workers, and business analysts can all benefit from intelligent reporting features, such as ad-hoc queries, scheduled reports, as well as flexible and easily used layouts. Open Text provides fully integrated and secure reporting and analysis of all managed content, including content usage patterns, metrics on load and capacity, analysis of content types and consumption, dashboard views of workflow status, completion rates, and bottlenecks. Configurable data navigation maps allow business analysts to deliver meaningful structured or ad-hoc analysis capabilities to the users who need it—all while respecting the access controls and content security delivered by Content Lifecycle Management. The Open Text reporting and business intelligence offerings also provide full integration to many database applications, and can provide powerful views into metadata for reporting and analytical purposes across applications. Connect your records metadata with your customer database to get a full 360° view of all client communication, or consolidate contract expiry data into one view by bridging the contracts held in the document repository with milestones in a structured ERP application.

Process intensive or highly regulated businesses can also benefit from automated extensions that build upon the workflow functionality of Content Lifecycle Management. The ability to create and manage forms—to standardize captured data or to kick off workflows conditional on the entered data—is available as an extension, as is electronic signature support. Organizations with strictly enforced procedures for sign off, or who require authentication and non-repudiation, can deploy e-signature functionality to mission-critical workflow scenarios.

## Control areas of biggest risk: Email

Email becomes a source of pain for public and private sector organizations when the obligation of legal discovery or freedom of information disclosure arises. Having evolved into the primary means of business communication over the years, email is a particular content management challenge due to sheer volume, difficulty in separating junk from business value, and the ad-hoc deletion, storage or filing habits practiced by most users. Email also contains valuable content needed for ongoing business—attachments, approvals, management directives and announcements. Capturing these electronic conversations in context with



other business artifacts is essential to understanding how decisions were made or transactions executed.

Organizations operating in litigious jurisdictions or verticals are often compelled to adopt Content Lifecycle Management with email management a key driver. Getting control over email capture, categorization and retention is the first step towards litigation readiness. Rapid and accurate search, retrieval and collection of email, along with the other electronic content that requires review for discovery purposes, is essential to relieving the disclosure burdens faced by legal counsel, compliance officers and the IT professionals managing the underlying systems. Successful records management initiatives must extend to email repositories and outline the appropriate preservation, storage and disposal rules in accordance with internal business needs and external regulation requirements.

Email can be considered semi-structured content. While typical messages contain unstructured text in the body, email headers provide structured metadata—to, from, cc, date sent, date received—that make automated capture and filing a reality. Depending on the needs of the enterprise, and of business users, automation of capture and application of records retention and metadata categorization can be done with individual messages by filing into managed folders in Content Lifecycle Management, or by using automatic classification tools to scan archived email and apply these rules using metadata or keyword triggers.

## Managing risk and the cost of litigation readiness: Electronic discovery

“The best offense is a great defense.” These words are especially true for companies that are frequently faced with legal discovery orders. Many jurisdictions are updating and reviewing the laws, and case law is evolving regarding the requests, collection and disclosure of electronic information. The US amendment of the Federal Rules of Civil Procedure in 2006, for example, has had a substantial effect on how records and compliance programs are instituted inside corporations. Five fundamental points, characterizing an ideal program, have emerged as guiding principles:

- Defensible record classification and retention policies: map email and other electronic content to applicable regulations and legislation
- Built on a comprehensive content lifecycle management framework: automated, secure and approved processes for retaining, storing and preserving records
- Extended to the entire enterprise: centralized authority and access to manage all corporate content, including email servers and collaborative sites such as SharePoint
- Providing seamless integration with discovery and litigation support systems: accelerate the collection, preservation, review and production of corporate records as evidence



- And common intelligent storage for all corporate records: using the inherent archiving capabilities of Content Lifecycle Management to ensure cost-effective physical storage of content according to their categorization, ensuring integrity and admissibility

Organizations with heavy eDiscovery burdens can look to using technology to automate and streamline more of the litigation readiness and realize cost savings by “in-sourcing” the early stages of search and collection. The inherent search, taxonomy, categorization and rule-based disposition abilities of Content Lifecycle Management build the ideal foundation to meet the rigorous requirements of evolving electronic discovery and disclosure rules and accepted practices.

### Empowering customers and partners: Delivering the right content to the web

Presenting the correct content to both internal and external audiences is a need for any organization. Using the managed repository delivered by Content Lifecycle Management to populate public facing Web sites and intra- and extranets is a logical component of an ECM strategy. Trusted content—the latest approved data sheet, the updated agenda, the legally approved terms and conditions agreement—is delivered through the preferred channel of consumption, the Web.

Web Content Management solutions from Open Text fully integrate into Content Lifecycle Management, allowing business users to ensure that content is accurate, approved and ready for broad publication. The enterprise can be proactive, using workflow, staging sites and subject matter experts—not programmers—to get content ready for public eyes. Feed the right content to the right people using simple but meaningful processes: this is the value of extending Content Lifecycle Management out to the enterprise and beyond.

Content delivered via the Web can also be personalized, tailored to consumers by role, team, interest, or by preferred form factor. Full compliance with standards, such as US Section 508, can be mandated to ensure the widest possible accessibility of sites and content.



## Communication and Ideas: The Real Foundation of Business

Ultimately, it is all just text and pictures. But the concepts, ideas, research and innovation expressed in the words and graphics we produce in the course of our work reflect our need to communicate and progress.

Organizations that value their heritage, their intellectual property, and the output of their information workers understand the need to create an information governance strategy to protect this content. For Open Text, Enterprise Content Management is the end-to-end portfolio resulting from decades of technology innovation, customer successes, and measurable productivity gains by companies across the globe. Our Content Lifecycle Management solutions are the ECM bedrock, the underpinning, the right place to start when pressured to unlock the potential stored inside corporate content and put it into action. Make your investment in words, and ideas benefit the enterprise's top and bottom line.



## Customer Quotes

“For us, the implementation of the Open Text ECM Suite with Open Text Records Management was about replacing old, unsupported systems. Without moving to these products, we wouldn’t have been able to improve efficiency and meet our regulatory requirements. We have ensured security and visibility of information, are compliant with legislative requirements, and we no longer have to worry about lost or misplaced documents.”

**Marcus Darbyshire, Chief Information Officer, South East Water**

“We now have a standard and enforceable process by which our organization maintains communications and work files. We’re working efficiently together, reducing business risks and protecting our intellectual capital. We looked for a solution and found that Open Text came closest to what we needed with its knowledge management capabilities. One hundred percent of its functionality was applicable, off-the-shelf.”

**Noella Bordian, Corporate Records Manager, TRANSLINK**



## About Open Text

Open Text is a leader in Enterprise Content Management (ECM). With two decades of experience helping organizations overcome the challenges associated with managing and gaining the true value of their business content, Open Text stands unmatched in the market.

Together with our customers and partners, we are truly The Content Experts,<sup>™</sup> supporting 46,000 organizations and millions of users in 114 countries around the globe. We know how organizations work. We have a keen understanding of how content flows throughout an enterprise, and of the business challenges that organizations face today.

It is this knowledge that gives us our unique ability to develop the richest array of tailored content management applications and solutions in the industry. Our unique and collaborative approach helps us provide guidance so that our customers can effectively address business challenges and leverage content to drive growth, mitigate risk, increase brand equity, automate processes, manage compliance, and generate competitive advantage. Organizations can trust the management of their vital business content to Open Text, The Content Experts.

[www.opentext.com](http://www.opentext.com)