

# Open Text eDOCS Integration for Microsoft® SharePoint®

Consolidate SharePoint content into a centralized system for content lifecycle, records management and archival for decentralized SharePoint applications

## Improve content management across your organization

You already know why you need to manage your content better. Regulations, litigation, hampered processes, costly and complex infrastructure, and stifled business growth. But how do you get things started?

Open Text eDOCS Integration for Microsoft SharePoint by SeeUnity Inc., enables organizations to capture content created in SharePoint so that it can be centrally managed in accordance with regulatory and business requirements. With eDOCS Integration for SharePoint, companies can develop comprehensive compliance solutions governing electronic content, including email, file systems, and other record-generating environments, while ensuring litigation readiness and supporting discovery processes.

Many organizations deploy SharePoint in a decentralized, departmental manner, oriented toward meeting user requirements. Open Text effectively enables organizations to balance that equation, excelling at enterprise-focused and global deployments that accommodate the needs of corporate compliance and centralized IT, without compromising user productivity. With the flexibility offered by eDOCS Integration for SharePoint, organizations can choose the ideal

SharePoint user experience while having confidence that they have a central records management and archival system to manage business content.

## Archive Content Interactively or Automatically

Microsoft SharePoint makes it easy to create and populate sites with enterprise content, driving productivity by encouraging and facilitating collaboration. However, sites can often fall into disuse as projects are completed or put on hold. Effective archiving capabilities capture content in a centrally-managed system, supporting collaborative business processes that span applications, departments, and job functions.

The eDOCS Integration for SharePoint provides a scalable, integrated content archive that extends comprehensive lifecycle management and archival services to all SharePoint content stores across the enterprise. At the same time, it allows content to be repurposed across other SharePoint sites or within virtual folders in the same site.

- Archive documents with a single click from the SharePoint interface. Specific content can be interactively or automatically archived for future search and site retrieval. Users can also archive and classify documents as business records directly from the standard Microsoft SharePoint interface.
- Microsoft SharePoint Document Library attributes can be mapped to eDOCS Profile Fields, enabling archiving processes to be applied to specific types of documents.

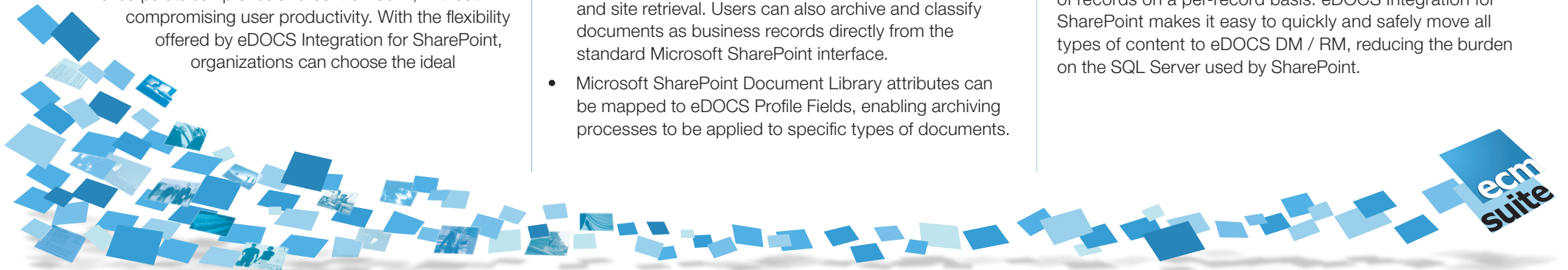
## Control Content Lifecycle with Open Text Records Management, eDOCS Edition (eDOCS RM)

Once business information can be managed centrally, you can control its lifecycle in accordance with internal policies and external regulations. Records management classifications can be applied to documents automatically as they are archived, or interactively by users at any time. Configure classification rules, such as that documents created in a particular SharePoint Document Library are classified as Standard Operating Procedures, retained in accordance with internal policy, and stored in the eDOCS RM FilePlan.

- Interactively classify documents as records with a single click from the SharePoint interface.

## Easily Adapt to Distributed and Changing Environments

eDOCS Integration for SharePoint enables you to not only centrally manage the retention and disposition timelines applied to records, but also handle the physical storage of records on a per-record basis. eDOCS Integration for SharePoint makes it easy to quickly and safely move all types of content to eDOCS DM / RM, reducing the burden on the SQL Server used by SharePoint.



## eDOCS Integration for SharePoint Features

### Ensure tamper-proof storage

Robust authentication capabilities, including time stamps and system signatures, mean that you can not only be confident that enterprise content is genuine and storage accurate, but you can prove it.

### Safeguard content for disaster recovery

Ensure that business-critical content is stored safely in multiple physical Safeguard content for locations. Specify heightened security requirements for specific documents.

### Provide immediate information access with powerful federated search

Extend SharePoint search, enabling users to simultaneously search across active content in SharePoint databases as well as archived records within eDOCS. A consolidated result list separates according to online or archived storage, enabling users to quickly identify which documents are in a final state and have been archived.

### Ensure preservation of discoverable records

Apply a hold to the record, or to multiple records at once from the search results page. Applying a hold to a record freezes its lifecycle, and ensures that it cannot be deleted under any circumstances.

### 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.

### Single Version of the Truth

eDOCS Integration for SharePoint, users can gain access to a given document from any of a number of user experiences, SharePoint, directly from within Microsoft Office, Microsoft Outlook, from a Web Browser or even from within other line of business applications.

## Solution Components

The solution is made up of three different products that can be used separately or together.

1. **Open Text eDOCS DM Extensions for SharePoint** – This product provides a series of Web Parts that allow a SharePoint user access into one or more eDOCS libraries. The Web Parts can be configured in a variety of ways to optimize how content is displayed to the user. This product also provides eDOCS Profile and Full-Text search capability from SharePoint.
2. **eDOCS Integration for SharePoint** – This product provides all of the functionality of the DM Extensions for SharePoint, plus it adds an additional feature set that includes bi-directional synchronization of content between SharePoint and eDOCS.
3. **Content Migrator for eDOCS** – This product allows for migration of content from and to Open Text Content Server, Open Text eDOCS, and Microsoft SharePoint. The migration tool allows administrators to quickly and efficiently move documents between these content repositories, as needed, to serve the given business need.