

Livelink ECM – eDOCS™ IM

The Business Challenge

Instant messaging (IM) is becoming critical for enterprise business communications. It enables real-time communication from anywhere — Web-based portals, cell phones, PDAs, pagers, and desktops. Organizations leverage instant messaging for real-time collaboration, fast decision-making, and cost effectiveness. IM enables teams to communicate in real-time through one-way text messaging, two-way text chats, and multi-participant conferencing.

Gartner, Inc. estimates that the number of IM businesses users in North America is projected to grow from 12 million in 2002 to 95 million through 2007.

The exponential growth of instant messaging could jeopardize compliance with corporate accountability regulations. For example, security regulations in the United States mandate that securities dealers keep electronic records of IM discussions for three years. Many organizations today limit or even forbid the use of unapproved IM services, since improper use can expose the enterprise to risks associated with security, compliance, and productivity. Security could be an issue when businesses use consumer IM solutions over insecure servers. In financial services, government, legal and customer service, where there are requirements for tracking internal and external communications, public IM solutions do not provide the audit trail and conversation logging capability needed to ensure the appropriate levels of management, control and policy enforcement.

IM is emerging as one of the latest technologies for streamlining real-time communications, increased productivity, compliance, and cost effectiveness. In combination with presence awareness — indicating user availability in real-time — IM is especially valuable for linking remote team members and the extended enterprise.

Livelink ECM – eDOCS™ IM

Livelink ECM – eDOCS IM is an enterprise solution that enables employees, customers, partners, and suppliers to collaborate in real-time while meeting compliance requirements. Livelink ECM – eDOCS IM offers unique value in three areas: facilitating real-time collaboration, capturing corporate knowledge, and enhancing productivity. The integration of instant messaging functionality with Livelink ECM – eDOCS extends the range of managed enterprise content by introducing the ability to treat instant messages as “records” with the appropriate audit trails, archiving, and disposition policies.

- **Real-Time Collaboration** — Livelink ECM – eDOCS IM enables real-time collaboration both inside and beyond organizational boundaries. Discussions could be started from within a project, community, folder or document managed by Livelink ECM – eDOCS. Collaboration “in context” streamlines efficiencies within a secure, auditable environment. Discussion threads can be stored in the Livelink ECM – eDOCS content repository for complete visibility into project progression and “train of thought”
- **Capturing Corporate Value** — Livelink ECM – eDOCS IM enables organizations to capture, manage, secure, index, search, reuse, and archive discussions as “records.” When captured and managed by Livelink ECM – eDOCS, instant messaging threads preserve collaborative efforts, knowledge assets, and best practices. Livelink ECM – eDOCS IM enables centralized control, reporting, and security of traditionally uncontrolled and unrecorded enterprise IM exchanges.
- **Enhanced Productivity through Presence Awareness** — Embedding real-time presence awareness into business process workflows could provide better customer experience management, workforce productivity and partner collaboration, and lowered operational costs. By incorporating presence awareness into business applications, IM eliminates the need for long voice-mail or email exchanges and facilitates collaboration across the extended enterprise. Presence awareness enables teams collaborating on projects to route work in real-time to available team members, thus accelerating time-to-market through faster project completion.



“Fully realized instant messaging will change how real-time business is conducted, and the real-time enterprise is at the cusp of exploiting it. Value will accrue as real-time enterprises embed in stant messaging at different levels of business processes to maximize reductions in lapsed time”

Gartner, Inc.

- **Persistent Presence** — Livelink ECM – eDOCS IM could be set up to be “ever-present” on a desktop as a task tray icon. This persistent presence provides a very practical method of delivering alerts and messages from other Livelink ECM – eDOCS component applications such as reminders about overdue project tasks, or checked-out documents. IM also leverages third party applications and allow users to receive notifications on their desktop. The ability to deliver alerts is particularly useful for remote workers.
- **Security** — Whether internal or external to the organization, all instant messages sent with IM can use a secure connection (SSL). Permissions are applied to determine which users can join discussions and check the availability of other users. Once discussions are captured and stored in the Livelink ECM – eDOCS repository, the flexible permissions and security model of Livelink ECM – eDOCS is used to control access to sensitive information.

Livelink ECM – eDOCS IM

- Securely communicate in real-time with other employees, customers, partners and suppliers
- View user presence in context, e.g. project team members, community membership, document owners
- Capture discussions in repository with full metadata profile, flexible access permissions
- Convert real-time discussion to threaded discussion for continuation after a meeting ends
- Initiate discussions in context, from within a project or folder or in relation to a specific document
- Share documents and other content with discussion participants
- Transfer files and share links to files in document libraries, communities, and projects
- Control personal “buddy” list in conjunction with centrally managed corporate groups
- Control own availability and presence to other users, e.g. away, busy, in meeting, unavailable
- React immediately to incoming high priority alerts from integrated applications, e.g. overdue tasks, document to approve

Livelink ECM – eDOCS IM is a feature-rich instant messaging solution that enables employees, customers, and business partners to collaborate in real-time. It maintains complete messaging logs to capture sessions for retention and knowledge management initiatives, and assists with regulatory compliance policies

Solution Benefits

For End-Users — Ease of Use

- Simply capture IM threads in DM
- Identical functionality and interface to familiar IM clients in use today

For Administrators — Ease of Administration

- Uses corporate directories such as LDAP to define and authenticate users and groups
- Granular administrative control over what content is captured and retained

For Developers — Easy to Develop and Extend

- Based on IETF-ratified protocol XMPP
- Fully documented API available for integrating functionality into other applications

For Organizations — Compliance and Security at Low Cost

- Corporate compliance for IM conversations, corporate compliance for instant messaging sessions (SEC, EU, Sarbanes-Oxley, HIPAA)
- Centrally managed information assets — capture, manage, secure, index and search, reuse, and treat discussions as records in corporate repository

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Open Text is a publicly traded company on the NASDAQ (OTEX) and the TSX (OTC).



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