Collaborative Edit for Documentum
MY NAME IS
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PRODUCT MANAGER

CONNECTING PEOPLE
TO THE ENTERPRISE

ENTERPRISE
INFORMATION
MANAGEMENT
For some time now, we live in a world where collaboration is the de facto standard. What has changed rapidly in recent years, is where that collaboration takes place. As a late baby boomer or early member of Generation X, I grew up in a corporate world where we all worked together inside our own brick-and-mortar. If needed, we all came together in a meeting room and discussed whatever was the topic.

As technology matured and working life became more flexible, collaboration also started to change. Today collaboration means being able to work apart together. Location is no longer relevant. Wherever I am, I can participate in the collaboration. But there is another dimension to collaboration that is far more complicated to achieve: allowing documents to be edited in the extended enterprise while remaining in control. I must be in control over the process as well as the quality. Working with an enterprise grade document management product like OpenText Documentum is great but limited when it comes to synchronous editing or reviewing. And limited when the participants are not also Documentum users. The flip side of the collaboration coin is, that the de facto product for collaboration - Microsoft Office 365 / SharePoint - on its own isn't best in class for document management.

Bringing OpenText Documentum and Microsoft Office 365 together as a technical trick, is what Informed Group delivers through their SharePoint Add-in for Documentum (SPA4D). It then becomes easy to deliver all kinds of scenario’s that leverages best of both worlds. But we went the extra mile. With Collaborative Edit for Documentum (Collaborative Edit) we deliver a business solution on top of SPA4D. A product that implements Connecting People to the Enterprise. A product that allows users of the extended enterprise to work with controlled documents inside Documentum.

In this flyer we share the highlights of this new product. Enjoy reading it!

Ed Steenhoek
Product Manager
Collaborative Edit for Documentum (Collaborative Edit) is a business solution that leverages the technical capabilities of Informed's SPA4D (SharePoint Add-in for Documentum) platform. The add-in runs inside the Office 365 / SharePoint environment and behaves like any SharePoint Add-in. It provides access to the information in Documentum through a DFS (Documentum Foundation Services) environment. This architecture is independent of the location of the elements. Typical scenarios include: cloud, hybrid, and on-premise.

**What are the characteristics of Collaborative Edit**

**Controlled**

The document controller in Documentum decides whom will participate in the collaborative edit sub-process and when it starts and stops. Once started, the document can be shared by participants with other Office 365 users. This is all captured and secured in the audit trail.

**Independence**

Anyplace, anytime, anywhere. The three pillars of independence that are needed to provide first class collaboration. It is possible to participate from any location at any given time that suits you best within the limitations - if any - that the enterprise dictates.

**Synchronous**

The document remains the single source of the truth while it is edited or reviewed by multiple users at the same time. True synchronous editing. As a user you do see who else is making edits. This prevents a chain of reactions in a time consuming sequence.

**Ease of Use**

Technology has become a commodity to users. They expect certain behaviour, certain usage comfort. With the BYOD-wave, the expectation from users has increased to a level that is very well understood by Microsoft Office 365. That experience is now also available for Documentum content.

**Stop & Go**

The edits in the document are automatically saved and don't have to be finished in one go. Your partial edits are available to all other participants. And when you continue, the edits from the other participants are visible to further enhance your collaborative contribution.

**Expandable**

Because no Documentum implementation is the same, it is possible to expand the product to neatly fit any environment. Include it in an xCP process. Include it in a D2 workflow. Include it as part of the Life Science industry solution.
How to execute a Collaborative Edit session

Collaborative Edit allows end-users to collaboratively and simultaneously edit a document that is stored in Documentum. It comes with a reference implementation in D2, which works in a vanilla D2 application as well as the industry solutions like the Life Science Suite.

The Start
The initiator of the workflow decides which users and groups are added to the workflow in a preparation step. This can be done separate from the actual start of the collaboration process. Until the actual start, users can be added, removed or changed. Once the initiator decide to kick-off the collaborative edit process, the users are fixed - at least on the Documentum side.

The Workflow
The editors receive a Documentum task to access the document in Collaborative Edit mode. During this process, they have access to the full functionality which is provided through Microsoft Office Online. This include sharing with other Office 365 / SharePoint users. It also includes all the features they typically use in Microsoft Word / Excel / PowerPoint.

The Finish
Each editor can keep working on the document as long as needed. Only when the initiator finishes the process, their access will be removed. That also applies to access by Office 365 users that have received access through sharing. Once all editors have finished working on the document and they all signed off on the task in Documentum, the next phase begins. That is where the initiator transfers the document back into Documentum as a new version.

The Documentum Side
Collaborative Edit works with any recent Documentum version on-premise, in your (private) cloud, the OpenText hosted solutions and anything in-between. What Collaborative Edit needs is a DFS (Documentum Foundation Services) instance to talk to. DFS is responsible to connect with the Documentum Server behind it.

Due to this modular architecture, it is safe to connect an on-premise Documentum instance with Office 365. You only need a DFS instance in your DMZ between the outside internet and your internal network.

The Office 365 Side
When using Collaborative Edit in the context of Office 365, all is already in place to start using it. We offer Collaborative Edit as a subscription service using Microsoft Azure.

But on-premise or cloud-based instances of SharePoint 2016, SharePoint 2019 and SharePoint Online are also supported. In some of these cases, the Office Online server (also known as OWA or WOPI server) provides additional benefits.

For the many ways to use Office 365, we offer Professional Services to deliver the benefits of Collaborative Edit.
Collaborative Edit is a business solution on top of the SharePoint Add-in for Documentum platform

How do you manage the ever-growing amount of information in a world that requires more and more control over your information processes? The Cradle-to-Grave concept offers you the solution. Implementing this concept, puts your organization in control from the moment content is created until it is no longer needed. This can be done through a single solution (e.g. Office 365 or OpenText Documentum) but also by combining Office 365 and OpenText Documentum through our SharePoint Add-in for Documentum (SPA4D) platform in general or the more specific business solutions like Collaborative Edit or Collaborative Partner Exchange.

With SPA4D, you can implement the Cradle to the Grave concept for all your content by combining the best of Documentum and SharePoint. The content is controlled by Documentum's powerful Document Management, Records Management and Advanced Case Management as well as the familiar user experience of SharePoint and Office 365. Users can easily create, edit, share, review and approve information within SharePoint. At the same time the information is stored and controlled in Documentum. This way, all the business rules from Documentum are applied ensuring that processes, permissions, lifecycles and workflows, configured in Documentum, are fully respected through SPA4D.

More and more people want to work using easy tools that can run on their computers but also on mobile devices like an iPad of a Surface. SPA4D has an easy to use and understandable interface that blends with the Microsoft Office experience, and also supports touch-enabled devices. Some users might find it difficult to find information, for example because they are not very familiar with the information governance structures. With the highly configurable search of SPA4D, these and all other users can use both keywords and predefined metadata options to find the information they are looking for and drill down further using filters and facets to locate the information. Together with our preview functionality you can easily find what you are looking for.

Beside the standard apps of SPA4D, like the Browse App-part (to view and edit documents), the Inbox App-part (to view and finish tasks) and the Search App-part, we also have a case management dashboard and dedicated support for Life Science (SPA4LS) with e.g. a “To Be Read” (TBR) sign-off. All of this can be used in an on-premise installation of SharePoint (2013, 2016 and 2019), but also in the cloud using Office 365 or in a hybrid installation of SharePoint.
Why Choose For
Informed Group

In 2006, Informed Group started as Informed Consulting and has ever since been helping its customers successfully implement information management solutions based on Documentum (OpenText) and Office 365 / SharePoint (Microsoft). We have a track record with customers in 20+ countries with a team of 35 – mainly senior – proven professionals and a network of 20 qualified freelance consultants. With over 100 successfully delivered projects, we are experts in Intelligent Information Management.

**OpenText Documentum Partner**

Informed Group is one of the largest OpenText partners in Europe and is the to go to EMEA partner to implement solutions in the SMB Life Science industry. Integrating Documentum and Office 365 is a speciality.

**Microsoft Office 365 Partner**

Informed Group uses Office 365 on its own or in combination with Documentum. And always to support user adoption in scenarios that connects people and enterprise needs.

**AIIM Leadership Council EMEA**

Informed Group is an active member of the AIIM Leadership Council in EMEA. We value the expertise of AIIM when looking at what the future Intelligent Information Management brings.

**Young Professional Academy**

With every organization we share the demand for talent. Our approach: hire graduates and learn them our trade based upon our values and experience with practical examples. This academy is open to customers as well.

**DOLSR: Our Private Cloud**

Documentum was created on the demands of regulated industries: Aviation and Life Science. Its Life Science Solution implements the DIA eDM reference model. DOLSR is the only offer of this industry solution, that is tailored to the needs of SMBs.

**EIM Products**

Other Enterprise Information Management products available from Informed Group are: Collaborative Partner Exchange, SPA4D, SPA4LS, EQMS Express and the Meta Data Publishing Tool.

Visit [www.informedgroup.com](http://www.informedgroup.com) for more information about our products and blog posts of our consultants.
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