Objective

CAPABILITY OVERVIEW
DOCUMENT MANAGEMENT

OBJECTIVE RECORDS MANAGEMENT SOLUTION DELIVERS A PLATFORM FOR COMPLIANCE AND ACCOUNTABILITY OF BUSINESS INFORMATION WITH EFFECTIVE LIFECYCLE MANAGEMENT. IT SUPPORTS RECORDS MANAGERS' CLASSIFICATION, AND SENTENCING AND DISPOSAL MODELS, YET BUSINESS USERS ARE NOT BURDENED WITH THE COMPLEXITIES OF RECORDS MANAGEMENT, GREATLY ASSISTING COMPLIANCE THROUGHOUT THE ORGANISATION.

BUSINESS BENEFITS

- **Comply with industry standards** to ensure availability of the most recent version and document history

- **Capture electronic documents** from any source for ease of use

- **Improved productivity through enhanced search and retrieval,** and automating review and approval processes.

- **Better decision-making based** on the timely availability of all relevant information.

- **Improved operational effectiveness** from an ecosystem of applications.

- **Secured intellectual property** and confidentiality of information.

- **Business process automation and mapping,** to guide staff in their roles.

PRODUCT FEATURES

- Document Lifecycle Management
- Comprehensive Search and Discovery
- Defence-Grade Security
- Choice of User Interface
- Email Management

THE BUSINESS OPPORTUNITY

Today's organisations are buckling under larger quantities of content, documents and information than ever before. Managing this electronic content is presenting an even greater challenge than managing paper ever presented. IDC research shows the digital universe was 281 exabytes in 2007. IDC predicts that by 2020, the digital universe will grow by a factor of 300, from 130 exabytes in 2005 to 40,000 exabytes, or 40 trillion gigabytes. From now until 2020, the size of the digital universe is expected to double every two years.

Organisations are striving to be more innovative and responsive to customers, stakeholders and competitive threats, yet at the same time they are bound by the constraints of operating in increasingly regulated environments.

To succeed in this environment, organisations are seeking:

- Confidence that their staff can make decisions based on the availability of accurate and complete information.
- To eliminate duplication of work in multiple areas of the business.
- To minimise the time it takes to leverage enterprise information to streamline processes.
- To provide authorised, current content to stakeholders.

A document management solution allows organisations to reduce the time and complexity associated with storing, organising and locating information, while streamlining business process automation.

OBJECTIVE DOCUMENT MANAGEMENT

Objective Document Management (DM) delivers organisations a single, central, and comprehensive view of all enterprise content.

This creates an enhanced ability to leverage an organisation's cumulative knowledge while simultaneously maintaining security and integrity of information.

Objective DM provides organisations with a foundation to effectively and securely manage, organise and share information throughout its entire lifecycle of: creation; revision; review; approval; publishing; and disposal.

With familiar content authoring tools, users are not required to learn new ways of working. Electronic documents can be "captured" from any source, including: word and spreadsheet files; presentation software; drawing packages; scanned images; workflows; databases; emails; audio; video; CAD applications and more.

Delivered as a component of its broader ECM solution, DM from Objective also supports:

- Records Management principles of retention, corporate value and disposals.
- Compliance principles of auditing and tracking actions.
- Workflow and Case Management principles of business rules and process.

While implementing new technology presents a change for users, Objective minimises the impact of change by offering business users a choice of interface options and software configuration choices to provide a view that reflects their work practices.

KEY ATTRIBUTES

COMPLY WITH INDUSTRY STANDARDS

Ensuring the availability of the most recent version of documents and a document history is crucial to many organisations. This includes organisations working to comply with industry or regulatory standards, those in a customer service environment, those managing many revisions of technical documentation and many more.

Every action that occurs within Objective ECM can be audited, providing the documentary evidence required to meet obligations to standards and legislation. It also supports evidence-based decision-making.

CAPTURE FROM ANY SOURCE

Electronic documents can be captured from any source. These documents may be captured either directly into the Objective Navigator desktop client, uploaded to Objective through the Objective Portal client or simply saved directly to Objective using WinTalk, Objective's desktop operating system integration which makes Objective look just like any other filesystem or shared drive in the standard application Save As

dialogue. Documents can be captured 'as is', or subject to further processing such as imaging and/or optical character recognition (OCR), or the creation of different types of renditions, such as PDF or HTML renditions.
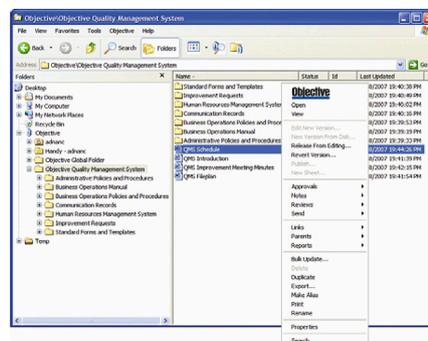

Figure 1 – Objective embedded as a folder within Microsoft® Windows.

MULTIPLE INTERFACES FOR MULTIPLE AUDIENCES

User acceptance of business systems is now recognised as one of the most important factors in the system's success. Objective offers several deployment

MICROSOFT EXPLORER INTERFACES

The Microsoft® interface has become the de-facto that all users are familiar with. Objective can be accessed through Microsoft® Windows, Microsoft® Outlook as well as Microsoft SharePoint. Users do not need to learn a completely new interface – their existing interfaces are simply enhanced with Objective's ECM options.

INTUITIVE OPEN AND SAVE FROM AUTHORING APPLICATIONS

Opening or saving a document from Objective is no different than opening or saving a document from the file system. Objective is presented as another Drive in the standard Open and Save dialogs. It is not necessary for users to learn a new way

of accessing documents – it can all be done from their authoring application, whether that is Microsoft® Office, AutoCAD® or any other desktop application.

MAXIMISE USER ADOPTION

Objective Executive provides light-touch zero-training browser access to the Objective ECM platform. Objective Executive supports the large group of users in an organisation that need search or read access and simple contribution functionality. With fast access to documents and folders, a simple one-field search facility and the ability to quickly add, approve and publish documents, it delivers a platform for pervasive user adoption.

COMPREHENSIVE ECM INTERFACE

Objective Navigator, our rich desktop experience is the solution of choice for people in roles that demand constant enterprise content or process interaction. Objective Navigator provides a powerful, sophisticated yet simple environment for dedicated professionals, including Records Managers, Knowledge Workers, Engineers and Content Administrators. Objective Navigator offers a range of features designed to enhance the user experience. Objective's 'status at a
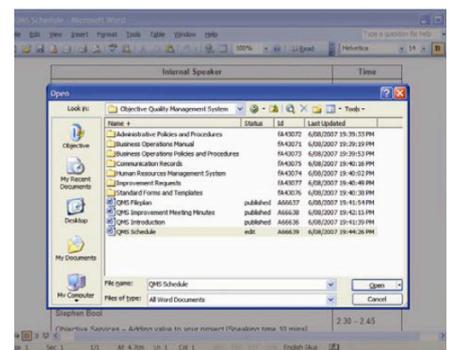

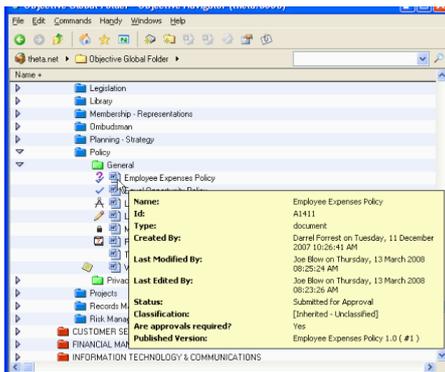Figure 2 – Opening a document from the authoring application, in this case, Microsoft® Word.

Figure 3 – Objective's ECM interface showing 'Status at a Glance' icons and metadata summary.

glance' icons enable people to immediately see whether a document is published or in draft mode, whether it is locked and being updated by another user or whether it is awaiting approval.

A conceptual summary of the object, as well as the object's metadata is also immediately available. All of this is performed without leaving the screen, opening an additional window, or the document itself, which eliminates delays and the frustration of searching for relevant information.

COMPREHENSIVE SEARCH AND DISCOVERY

Providing the ability for people to find exactly what they are looking for is critical to their success. With Objective, users can search for a range of information across the entire corporate information collection, including documents, audit trails, folders, files, workflows, saved searches, users and groups. Searches are of course subject to comprehensive security privileges.

Objective Discover makes it easier and more intuitive for people to find documents most relevant to their search by uncovering information that would otherwise be hidden. By understanding the context of each search query and refinement, Objective Discover adds real value to the search experience by providing

refinement options that help and guide staff towards highly relevant information, based on the context of each and every search executed. By surfacing the available metadata within search results and delivering structure out of unstructured information, Objective Discover makes relevant information easily available to everyone.

Sometimes it is necessary to save the results of a search, time stamp the result set, and the criteria and security level of the person running the search. Objective provides for this requirement by use of the "Snapshot" function. Search results may be saved simply by selecting the "Snapshot" button found on the search screen. This produces a PDF document of the search results, the search criteria used to get the results, and other important information.

EMAIL MANAGEMENT

Objective provides email capture for Microsoft® Outlook, Lotus® Notes and GroupWise® email clients. At its simplest level, users can drag and drop multiple messages directly into the Objective hierarchy of folders and files, where the message, the message and its attachments or just the attachments can be saved.

Attachments are saved discretely maintaining their context through being automatically cross-linked to the originating email message. Microsoft® Outlook and Lotus® Notes messages are saved in their native formats allowing them to be opened from Objective directly into the email client and responded to in the normal manner.

LIFECYCLE MANAGEMENT

Objective supports the entire document lifecycle where documents can be created, revised, sent for review, sent for formal approval using electronic signatures, and

published all from the one application. Published documents can be automatically rendered to PDF or PDF/a, protecting intellectual property and providing a more convenient format for distribution. After a period of time documents can be disposed of when no longer required. Objective maintains a complete history of a document's lifecycle from first draft through to disposal, managed under your business rules.

WORKING REMOTELY

Users wanting to work offline on documents on their laptop are supported by Objective's Offline facility. Objective Offline automatically provides all documents you are editing, or that require your approval, as well as key documents or a core area of the ECM you may need to refer to. Documents can be designated as "Offline" allowing them to be edited and versioned while not being connected to the Objective system. On reconnecting to the system any changes are automatically synchronised. Any document that is open for editing will by default be available for them while offline.

SECURITY MODEL

While providing complete, accurate and current information is the over-riding goal of any document management solution, ensuring security on confidential, private or sensitive information is imperative.

Objective's Defence-grade, 3-tier security model allows organisations to effectively support their users as well as restrict access rights to managed documents and objects through: Access Privileges; Classifications (e.g. Top Secret, Secret, etc); and Caveats (e.g. Medical-in-Confidence).

REVIEW CYCLE

When a document or workflow has reached its final draft, it is often necessary for it to be reviewed to ensure its contents are precise and complete. Objective's reviewing mechanism is simple and easy to use. Reviewers receive an e-mail message that includes a reference to the document or workflow to be reviewed.

Keeping track of reviewers and their comments is as simple as selecting the document or workflow and choosing "Show Reviews".

LINKS AND COMPOUND DOCUMENTS

Complex and large documents often need to be divided into component documents. Objective manages these documents with links providing a relationship between a parent document and its child (or embedded) documents. Opening a parent document automatically opens all child documents. Relationships between documents can be complex, as in a compound document, or as simple as a reference. Objective supports a range of relationships covering Dependency Links for embedded documents, Rendition Links, and Cross-Reference Links for bi-directional relationships.

OBJECTIVE ENTERPRISE CONTENT MANAGEMENT

Objective ECM is a comprehensive Enterprise Content Management solution that connects your people to your enterprise content and business processes.

Objective ECM effectively manages the entire range and life-cycle of an organisation's unstructured content – electronic documents, records, email, web content, engineering drawings and more. It manages document-centric processes, controlling automating and optimising business processes.

Organisations implement Objective ECM to re-use corporate memory, minimise processing costs, prove regulatory compliance, provide security and accountability of information and most importantly, make effective decisions based on complete information.

Managing content alone however is not a solution. In order to leverage content as a strategic asset, it should meet the needs of the people who rely on content in their daily work. Staff, suppliers, contractors, partners and citizens – all consume, manage and contribute content to an organisation's knowledge store. Objective ECM meets the diverse needs of all of these people delivering ultimate value to the organisation.

ABOUT OBJECTIVE CORPORATION

Objective Corporation is an established leader and specialist provider of proven content, collaboration and process management solutions for regulated entities.

Objective's solutions are used by more than 250,000 people on a daily basis.

Since its inception, Objective has been at the forefront of the Information management industry. Objective is headquartered in Sydney, Australia with a further thirteen offices across Asia Pacific, North America and the United Kingdom.