



## **GCI Power Tools for Open Text ECM**

Global Cents provides premium value-added Enterprise Content Management (ECM) products and professional services. We have the most per capita experience providing Open Text ECM Suite extensions, custom modules, and consulting for OScript, WebLingo, Open Text database, LAPI, DAPI, WAPI, and UAPI. Our extensions to Open Text modules are used by Fortune 1000 companies to reduce cost, expand user adoption and meet regulatory requirements in areas that include Open Text workflow, document management, and collaboration.

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#### » ***GCI Power Tools for Deployments***

IT departments face challenges when rolling out new applications, or troubleshooting and integrating new modules and functionality into Open Text ECM Suite deployments that are already in production. This process usually involves moving the application from a development environment to the testing environment and then to the production environment, or merging disparate instances into one. GCI Power Tools for Deployments solves this problem by enabling the export of an entire product object structure (or selected components) into a set of XML files and then supports moving them into the new environment together with recreating the entire structure, in the new deployment. The references between all the imported objects, and the references to the system users, are all maintained.

#### » ***GCI Power Tools for Open Text Workflow***

GCI Power Tools for Open Text Workflow is a collection of advanced tools for extending the functionality of the Open Text Workflow module. These tools take basic Open Text Workflow capabilities up to the next level, making it possible to tailor the user experience with per step customviews, extend controls over content, support auto-completion and escalation, send sophisticated email communications and also utilize a powerful event subsystem for automating responses to additions and changes to objects in a Open Text ECM Suite repository.

#### » ***GCI Power Tools for Open Text Electronic Signatures™***

The Open Text Electronic Signatures module has become the Open Text Workflow standard for regulated industries requiring electronic signatures that meet compliance standards such as 21 FDA CFR Part 11. GCI Power Tools for Open Text Electronic Signatures enhances the capabilities of this module, adding much-needed functionality such as multiple document approval & routing and providing a more seamless integration with the natural business processes for companies in these highly regulated industries.

#### » ***GCI Power Tools for Archiving***

Archiving and records management for ECM systems are an integral part of best practices and compliance for regulated industries. Archiving data from the Open Text ECM Suite is possible with many existing solutions. However, archiving items such as Projects and Workflows and removing them from the database (for significant performance improvements) is not available in any existing solution – until now. GCI Power Tools for Archiving addresses these needs and much more.

#### » ***GCI Power Tools for Open Text Live Reports***

GCI Power Tools for Open Text Live Reports (PTLR) adds the ability to create custom displays to Live Reports, Search templates & results. PTLR also provides the capability to run and display multiple Live Reports on a single end user report, and push & pull content through a different database via Open Text Workflow. PTLR uses industry standards such as HTML, XML, XSL, and JavaScript, so it doesn't require learning arcane tag and programming languages to create sophisticated reports.

#### » ***GCI Power Tools Migration Manager***

The GCI Migration Manager is a desktop application that allows a user to select file/folder structures to import into the Open Text ECM Suite repository from a file share volume. Choose the files/folders to add to the repository, specify where to add them, select & apply group permissions to the items, define attributes and much more, all with a few mouse clicks via the intuitive user interface – making this otherwise arduous time consuming task pain & error free. The resulting files, with their included properties, can then be imported into the repository via GCI Power Tools for Deployments or Open Text's Object Importer.

#### » ***GCI Power Tools for PleaseReview™***

GCI Power Tools for PleaseReview™ provides a seamless integration between an Open Text workflow and a PleaseReview collaborative document review. Now you can have the "best of both worlds" – Open Text Workflow can control the initiation of a PleaseReview process, impose deadlines and escalations, and capture review information as artifacts in the workflow for a complete end-to-end auditable process.



## **GCI Power Tools for Deployments**

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### ***Paving the Way to Safe, Effective Open Text ECM Suite Migration & Deployment***

IT departments are currently faced with the daunting task of integrating and troubleshooting new modules and functionality in Open Text ECM Suite deployments that are fully operational. This process usually includes moving the application from a development environment to the testing environment and then to the production environment. The current method for accommodating this migration usually entails countless hours recreating taxonomies and reconfiguring categories, forms, web reports, and workflow maps. The margin for error is considerable in this labor-intensive procedure.

GCI Power Tools for Deployments (PTD) solves this problem by exporting the entire product object structure into a set of XML files, and then supports moving them into the new environment together with recreating the entire structure in the new Open Text ECM Suite deployment. The references between all the imported objects, and the references to the system users, are all maintained after the import.

Circular category dependencies are also maintained in PTD. If the category has not been created at the time an object that uses that category is created, the information is cached until the category is imported and re-linked. Forms and Form Templates can be exported and imported maintaining not only the template links, but also the view links. Form data and form data stored in tables can be exported across systems as well.

PTD also solves the problem of moving workflow maps from one system to another: workflow maps are updated to re-link all forms, categories, objects, and attachments. PTD also supports exporting user and group items created during development and recreates them on the new system, as well as remapping the user IDs (provided the names and domains are the same).

In addition to platform lifecycle management, PTD also facilitates testing and troubleshooting objects in the Open Text ECM Suite repository that were heretofore unable to be separated for external analysis. Problem objects can now be exported by PTD and sent to specialized technical support where these object structures can be easily recreated and tested.

PTD also facilitates the importing of content into Open Text ECM Suite repositories from file servers when used in conjunction with the GCI Migration Manager.

PTD is also ideal for merging and dividing Open Text ECM Suite repositories. And because it supports audit and creation information, PTD is strategically aligned with Global Cents' content validation partner Valiance TRUCompare™ to provide complete, end to end migration & validation solutions for even the most demanding of regulatory environments.

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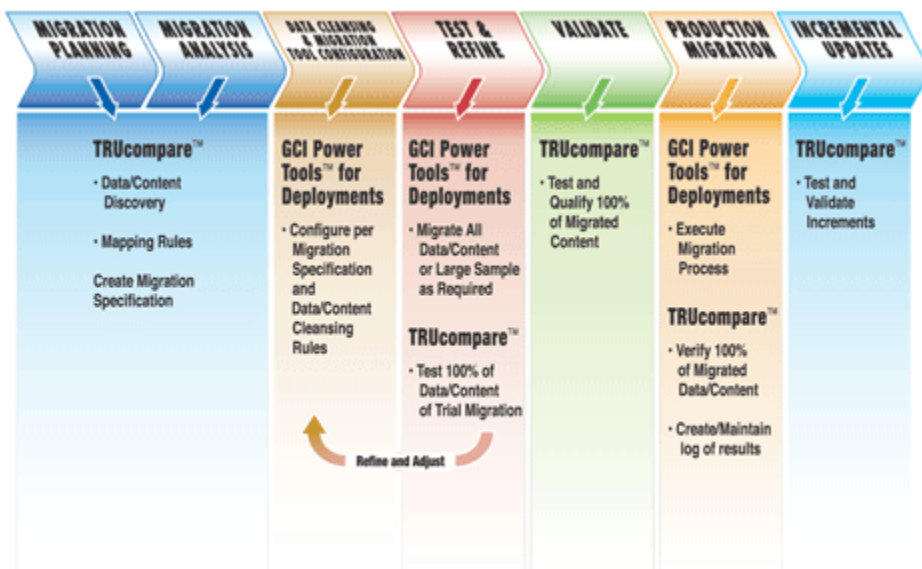
### **GCI Power Tools for Deployments Version 2.0 Also Supports...**

- Update existing objects – in addition to adding new objects v2 supports updating existing objects. v2 also adds new versions to workflow maps and form templates. A must-have feature when updating an already installed vertical application
- Create multiple exports – v2 supports the creation of multiple export files. This allows different versions of exports to be created and saved without overriding previous exports. This feature is also very useful when doing migrations that are very large by allowing the data to be migrated in chunks
- Imports Selection List – in conjunction with the ability to export multiple files, v2 supports the ability to select an import file from a list of available imports. This is very useful when doing large migrations
- *Plus* – select where to export to and import from • export only the last N versions of the exported items • allow an SQL statement to be used to select the items for export • enable exporting of Signing Users and Groups • and much more

### **Best of Breed Migration and Testing for a Complete Open Text ECM Suite Solution**

GCI Power Tools for Deployments can be combined with the GCI Migration Manager and TRUcompare™ to deliver a complete solution for the design, implementation, testing, and validation of mission critical content and data migrations into the Open Text ECM Suite.

TRUcompare, by Valiance Partners, is an automated migration-testing tool that empowers Open Text users to quickly and efficiently qualify and validate all the content and data migrated from one or more sources into a target Open Text repository.



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These proven and complementary products assure the most accurate and cost-effective migration results, where quality, validation, and compliance are fundamental success factors.



# GCI Power Tools for Open Text Workflow

## New for Version 2:

- Start step

The "On Initiate" tab is added to allow specification of what's to happen right after initiation, what the next URL will be, and whether you want the workflow initiation message shown or immediately open the next task

- User/Initiation step

More notification options are now available, including: invoking standard notifications based on additional events, the ability to create an email message based on an event, and additional options for when to send the notifications or emails such as when it's late by a certain date or when a block of time has passed, or if it will be late after a period of time has passed. You can also escalate a step to another user based on the same criteria

- Power Tools Step:

- Email

The ability to send multiple attachments to an email with more ways to configure the To, CC, and From addresses.

There are also more replacement tags available including <Server>, <Today >, <StepURL>, <TaskTitle> and <TaskDueDate>. There is also an action tab that can clear or set a nickname for an Open Text ECM Suite item

- Action Tab

Clear or set the nickname for an Open Text ECM Suite item. Delete N versions for an item, more options for the Reserve by Target option, and store a target NodeID in an item reference attribute

- Workflow Properties Tab

Support changes on workflow, subworkflow or workflow step:

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## Extending the Power & Usability of Open Text Workflow

Global Cents Power Tools for Open Text Workflow (PTW) is a collection of advanced tools that extend the power and usability of the Open Text Workflow module and greatly increase the return on the Open Text ECM Suite investment, especially for organizations that rely heavily on business process automation.

Included in the PTW toolkit are: custom view displays on a per step basis, initiating a workflow from an item in the Open Text ECM Suite repository, additional Item Handler functionality, Auto Completion functionality, a PTW Task Type for the Workflow Painter, PTW Action, Data Report and Shortcut Tabs, and Event Trigger Auto-Initiation. PTW is internationalized and fully upgradeable.

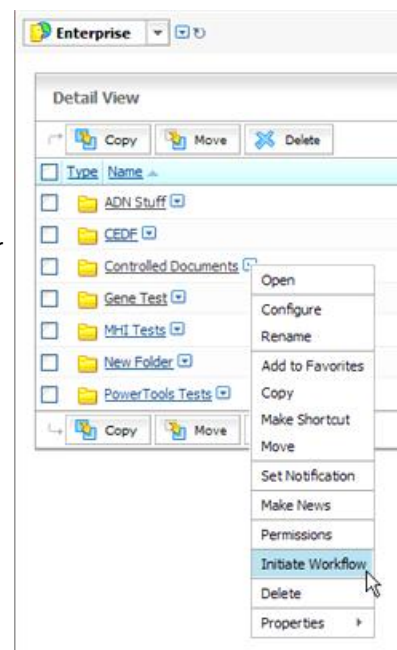
## Power Tools for Workflow Key Features and Functionality

PTW has features that reduce the cost of maintenance, extend the usability, and increase the functionality of the Open Text Workflow module. The following are descriptions of some of the key features of PTW:

### » Initiate a Workflow from an Item in the Open Text ECM Suite Repository

PTW adds the ability to initiate a workflow from any item (not limited to the document type only) via the Functions menu. Categories and category attribute values on items can determine which workflow maps can be initiated from which items. The map designer can specify how the item should be added to the workflow as well as defining what data should be retrieved from the item to default values of workflow data.

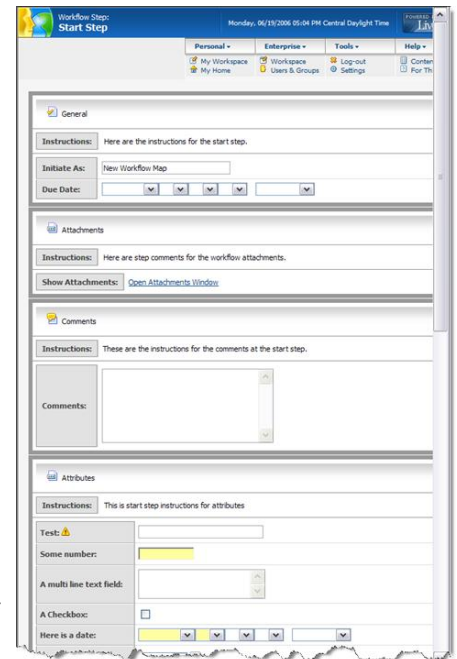
PTW functionality allows Open Text Workflow to become more document-centric and offers more control over access to Open Text items. In a heavily regulated industry where companies use the Open Text ECM Suite, PTW can be used to allow workflow processes to handle standard item functions like, Rename, Copy, Delete, all within an audited review process.





## » Create Custom Views on a Per Workflow Step Basis

PTW's Custom View functionality gives workflow map designers the ability to have complete control over the display of workflow data to a step performer. Unlike Form views, PTW Custom Views can display not only form data, but also workflow attributes, comments, attachments, and general workflow information, all on the same page. This feature uses standard XML/XSL technology, so that anyone who can create an XSL file can create a custom view. This also allows Open Text workflow designers to construct the Form Templates with more of an eye toward standard database storage schemas instead of preoccupations about the display of the data. Also, the data from multiple forms attached to a workflow can all be displayed together and interspersed with other workflow data. Because this feature is built upon standard XSL technology, reusable templates can be created to facilitate the easy modification of multiple views at the same time.



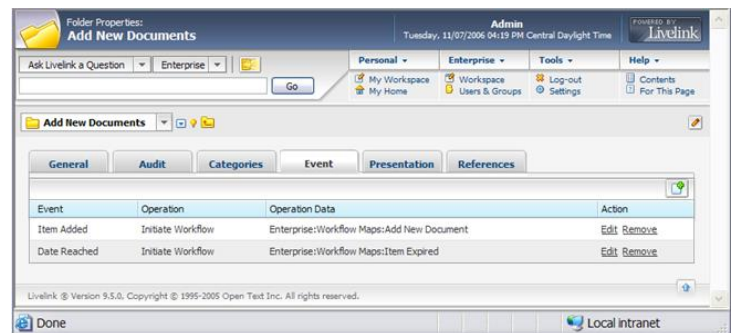
1. Set new title, due date, start date, completion action
2. Use date attributes (workflow or forms) to specify date criteria — and add or subtract days
3. Use replacement tags and/or constant values for new titles

Plus...

- Make more workflow data available for use in custom views (task and subworkflow information is now available on customviews). This applies to steps other than the start step
- Use the same workflow package with the main workflow and its subworkflows. This fixes the existing Open Text workflow problem regarding the display of information in the initiated sub-workflow. It also allows the map designer to specify that a sub-workflow, created by a sub-map step, should use the same data package as the parent workflow. This means that the sub-workflow can use the exact same attachments folder as the parent, or the exact same attributes or forms data (in the case of Attributes and Forms, the option is only available if the Attributes in both main map and sub-map are exactly the same)
- Item Reference attributes no longer lose their references when an in-process workflow is modified

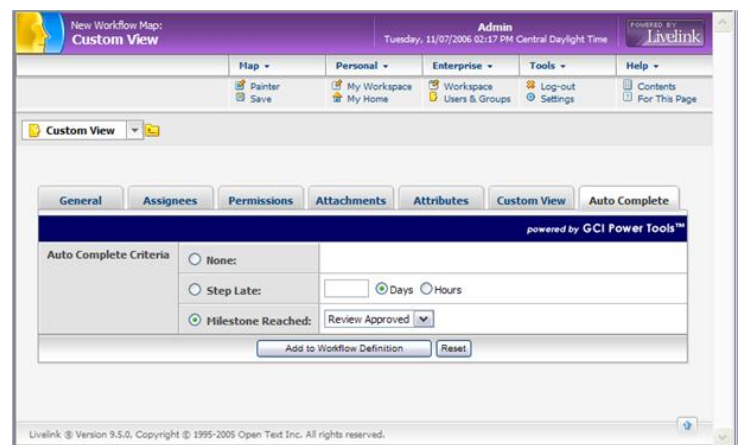
## » Event Trigger Auto-Initiation

This feature supports the definition of actions to be performed when specific events occur, including: when an item is added to a container, when a new version is added, or when a specified date is reached. This facilitates using workflow to add documents to a closed system as well as automatically sending documents for review when they expire.



## » Auto Completion

PTW adds the ability to have performer steps automatically complete themselves. The workflow map designer may specify that if a step, assigned to a user, is late for a specified period of time, or if a specified Milestone step has been reached, the step will automatically complete itself. If the performer of the step was supposed to choose a disposition, the default disposition value will be set for the step.



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# **GCI Power Tools**

## **for Open Text Electronic Signatures**

The Open Text Electronic Signatures™ module has become the Open Text workflow standard for regulated industries requiring electronic signatures that meet compliance standards such as 21 FDA CFR Part 11. GCI Power Tools for Open Text Electronic Signatures™ (PTES) enhances the capabilities of this module, adding much-needed functionality and providing a much more seamless integration with the natural business processes for companies in these highly regulated industries. PTES extends the usability and scope of what can be done with the standard Open Text Electronic Signatures module. PTES takes the strong foundation of electronic signature & 21 FDA CFR 11 support found in Open Text Electronic Signatures and enhances it to provide:

- Signing multiple documents
- Assembling multiple documents into one that can then be signed
- Flexible & complete control over:
  - Which document(s) are converted
  - Which document(s) are watermarked
  - Which document(s) are signed
  - Appearance of signature pages
- Improved Robot agent processes with enhanced error reporting and recoverability
- When used in conjunction with GCI Power Tools for Workflow (PTW), PTES also:
  - Supports signing using mobile devices (e.g. BlackBerry®)
  - Provides the ability to customize the UI for Approvers on signing steps

### **GCI Power Tools for Open Text Electronic Signatures Features & Benefits include:**

- Electronic Signatures assumes a one-document per one-workflow relationship. PTES allows multiple documents to be supported in a single workflow. This enables a customer's business process to be automated without having to be redesigned to meet the restrictions of the standard module
- Electronic Signatures does not support dynamic identification of what document to convert/watermark/ sign. PTES allows dynamic identification of what document(s) to convert, watermark and/or sign. Item references, item copy references, and other information in the workflow about a document can be used to determine the current target of the OT Electronic Signatures operations. This can also be controlled on a per-step basis and support more than one specified document as well
- Electronic Signatures puts required information (for compliance) onto a signing page, but many times customers want additional metadata to appear on the page. With PTES, a 'customview' can be defined for a signing page and a stylesheet can be used to enhance the content on the page
- PTES is designed to have robust error handling and recoverability
- Approvers (Signing Users) are frequently executives who do not want to be bothered with learning a new, infrequently-used technology. With PTES and PTW, signing steps can be customized to be more usable and attractive. Add to that the option to sign via a mobile device and user adoption is greatly improved

PTES will support the Open Text ECM Suite 9.5-9.7.1 with release-appropriate versions of Electronic Signatures (e.g., Electronic Signatures 2.7.1 for ECM Suite 9.7.1).

If your organization relies on the Electronic Signatures module for your regulatory electronic signing requirements then PTES is a must.

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## **GCI Power Tools for Archiving**

Archiving and records management for ECM systems are an integral part of best practices and compliance for regulated industries. Archiving data from the Open Text ECM Suite is possible with many existing solutions. However, archiving items such as Projects and Workflows and removing them from the database (for significant performance improvements) is not available in any existing solution -- until now. GCI Power Tools for Archiving (PTXA) addresses these needs and more.

### **Efficiently Archive Open Text ECM Suite Data *And* Improve Performance**

With PTXA you can archive Open Text ECM Suite data (such as completed or stopped Workflows, Projects, Discussions, Task lists, Documents etc.) as XML files that are then added back into the Open Text ECM Suite repository. PTXA then removes the original data from the database tables, which can result in significantly improved performance of active workflows and the Open Text ECM Suite system in general. For example, if you have a completed Open Text Project containing 100 items in the database, that equates to approximately 2,500 database rows for documents with 5 versions. Archiving that project will reduce the number of database rows to fewer than 10 (depending upon permissions).

### **Industry-standard Portable Format**

A complete record of the item is stored within the XML document, including all attachments, attributes, forms, comments, audit trails and user information, or items stored in that container. These XML documents are then associated with our supplied XSLT files (or you can create your own custom XSLTs) for displaying the data in a web friendly format.

### **Archive Right Back Into the Open Text ECM Suite Repository and Apply Its Powerful ECM Functionality**

Once your critical items are stored as XML documents in the Open Text ECM Suite repository you have the complete set of document management functionality available to apply to them. These 'documents' can be organized in a folder hierarchy with your desired permission sets. Also, PTXA supports the ability to create multiple archive volumes to store different node types and index that data for searching, which is an enormous benefit to any large Open Text ECM Suite installation.

### **Cost-Effective Solution Requiring No Additional Hardware or Software**

GCI Power Tools for Archiving is a cost-effective solution for all Open Text ECM Suite customers who need a complete archival system with no additional server to maintain.

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## **GCI Power Tools for Open Text Live Reports**

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The Open Text Live Reports module enables users to create and work with items called Live Reports. Live Reports are powerful tools that allow direct access to the RDBMS underlying the Open Text ECM Suite via Structured Query Language (SQL) statements. You can set up Live Reports to return lists of items that meet certain criteria, to report statistical information about the database contents (such as a pie chart showing the proportion of items owned by each user), or to change information in the database (for example, re-assign all tasks of a user who left the organization). For example, you can run a Live Report that lists all items that you have reserved. This report shows you what proportion of space each user takes up, and enables transferring item ownership from a user who left your organization to their successor.

### **Expanding the Breadth & Depth of Live Reports**

GCI Power Tools for Live Reports (PTLR) allows you to create multiple simple SQL select statements to gather data from multiple tables in the Open Text ECM Suite database and display all that data together for the end user to see, taking advantage of the Live Reports module's built-in features such as filtering permissions. Being able to show all the data in a single report allows the end user to see the relationships between the different data elements far more easily.

### **New for GCI Power Tools for Open Text Live Reports Version 2**

In addition to the standard enhancements of PTLR, Version 2 also includes the ability to:

- Create custom views for Search templates and results
- Intermix SQL searches with content searches
- Push and pull content through different databases with Open Text Workflow
- Have a workflow step execute a Live Report automatically and save the results
- Schedule a Live Report to be executed and have the results saved

### **Easy to Use — No Special Proprietary Skills Required**

PTLR also uses XML and XSL to create the final display of the data to the end user. Because these are programming standards, there is no need to take a proprietary training class to learn how to create the custom display of the data. XSL contains programming capabilities which allow for complete manipulation of the data returned from the SQL statements. This makes it easy to do mathematical computations on the data as well as date and text manipulation.

Increase the effectiveness and flexibility of Live Reports for your users with this cost-effective and easy-to-tailor solution.

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# GCI Power Tools Migration Manager



One of the biggest obstacles to realizing the full power of the Open Text ECM Suite is the difficulty encountered when populating the Open Text ECM Suite repository with document content from existing file servers. Open Text offers a module for this (the Object Importer) – however, a control file must still be developed in order for any document to be migrated. A one-for-one mapping must be explicitly defined in an XML file for the Object Importer to: a) know where to get the file; and b) know where to put it inside of the Open Text ECM Suite repository. Most organizations possess large amounts of data and it is nearly impossible to dynamically traverse a fileserver, create the node mappings & folder structures, *and* add the associated metadata that your business has defined.

The GCI Migration Manager is a desktop application that allows a user to select file/folder structures to import into the Open Text ECM Suite repository from a file share volume. Choose the files/folders to add to the Open Text ECM Suite repository, specify where to add them, select & apply group permissions to the items, define attributes and much more, all with a few mouse clicks via the intuitive user interface – making this otherwise arduous time consuming task pain & error free. The resulting files, with their included properties, can then be imported into the Open Text ECM Suite via GCI Power Tools for Deployments or Open Text's Object Importer.

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## **GCI Power Tools for PleaseReview™**

PleaseReview™ is a collaborative review and authoring solution from Global Cents Solution Partner PleaseTech™ ([www.pleasetech.com](http://www.pleasetech.com)) that supports Microsoft Word, PowerPoint, PDF, images and image collections. GCI Power Tools for PleaseReview™ (PTPR) provides a seamless integration between an Open Text workflow and a PleaseReview collaborative document review. Now you can have the “best of both worlds” – Open Text Workflow can control the initiation of a PleaseReview process, impose deadlines and escalations, and capture review information as artifacts in the workflow for a complete end-to-end auditable process.

PleaseReview is used extensively throughout the Life Sciences industry. PleaseReview's clients range from small Biotechnology start-ups to 'Top 10' global pharmaceutical companies. The main use of PleaseReview in the Life Sciences industry is in the Medical Writing and Regulatory departments, but PleaseReview is also used in the Clinical, Quality and Marketing departments of many Life Sciences companies. The document review process is usually identified as the bottleneck in the document production processes in the departments named above. As such, PleaseReview is used throughout the regulatory process, both for submissions and for the review of internal standards and procedures. By deeply integrating PleaseReview with Open Text Workflow, PTPR provides enormous added value within these companies and their respective business process requirements:

### **GCI Power Tools for PleaseReview Features & Benefits**

- Allows creation of reviews under Open Text Workflow control. This enables enforcement of corporate standards such as allowable durations, whether or not users can take content offline during a review, relationships between reviews, and which users should be participating:
  - The creation of reviews under workflow control also alleviates the overhead of configuring a review
  - Defining participants and authors under workflow control also associates roles with business processes
- Allows for proactive monitoring of due dates and automatic escalation based on business rules:
  - Author/owner privileges can be transferred to another user either automatically or with minimal intervention
  - Prevention of lapsing of reviews
- Allows content to pass directly to and from the Open Text ECM Suite and PleaseReview, and the workflow controls the business process:
  - Where and when a document is added to the Open Text ECM Suite repository, or a new version is created, is under workflow control
  - Metadata updates and other content management functions are done via workflow
- Pass back audit information to the Open Text ECM Suite and store as a document anywhere in the repository
  - Verbose level of detail provided by PleaseReview also being stored in the Open Text ECM Suite gives an auditor one place to find exactly what occurred during the review process
  - Open Text's robust permission model prevents deleting of audit trails
- GCI Power Tools for PleaseReview leads to enhanced compliance with standards such as 21 FDA CFR Part 11

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