

11/14/2024

WEBINAR

What is **eDOCS Assist**, and how can it **boost** your document management processes?

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contesto

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Stavanger, Oslo, Riga, US



35 employees



Fully focused on «Intelligent Information Management» / 60+ customers using OpenText solutions



Global customer base and focus



3 solutions on OpenText SolEx pricelist



Why Assist ?

Customer Need/Use Cases

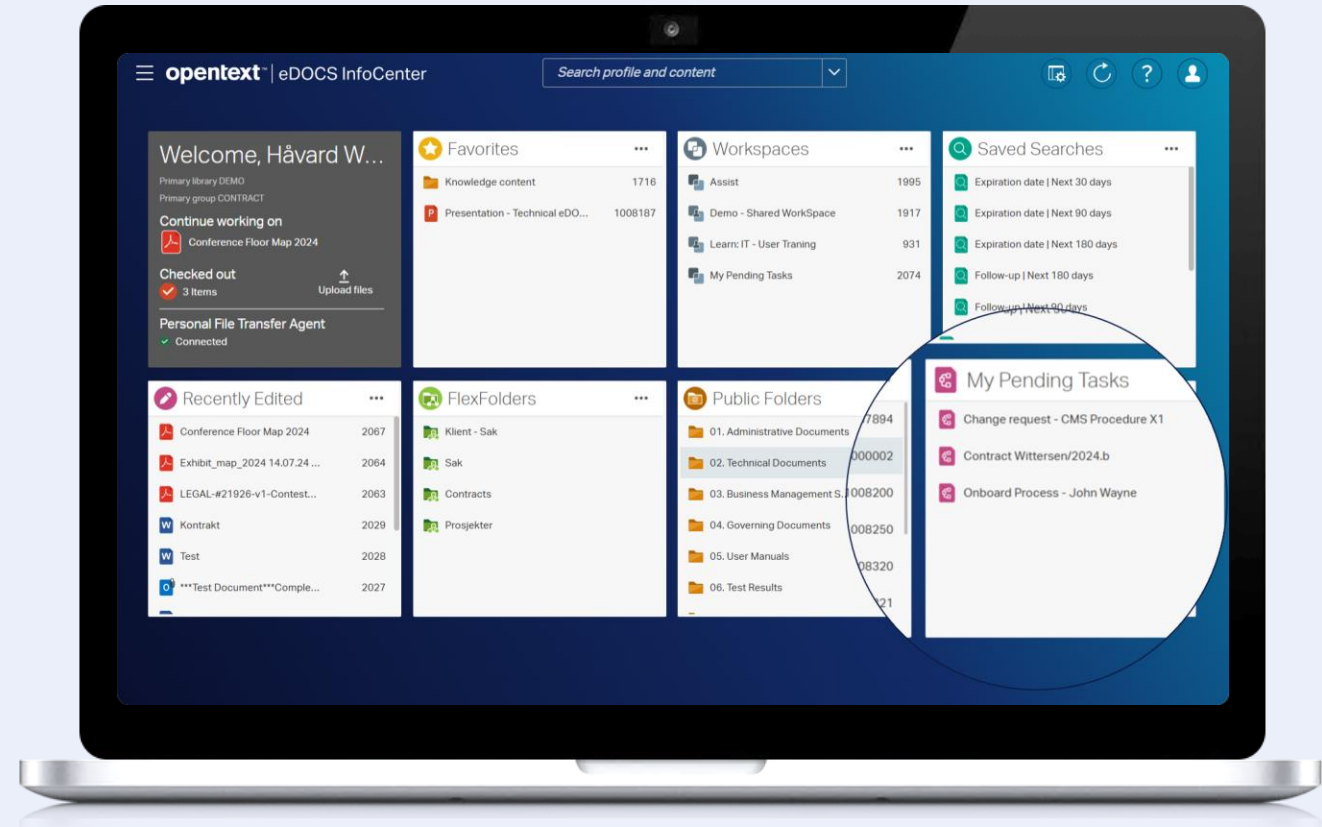
- ✓ Leverage technology to keep employees on task
- ✓ Avoid missed deadlines
- ✓ Stop manual and time-consuming processes
- ✓ Visibility into workloads and work progress

Benefits

- ✓ Automates processes related to one or more documents
- ✓ Ability to sign documents directly from InfoCenter
- ✓ Significant time savings compared to manual processing
- ✓ Quality and integrity throughout lifecycle with auditable histories

Differentiator

- ✓ Powerful workflow and task automation add-on
- ✓ User initiation of simple and advanced workflows on-the-go
- ✓ Seamless integration with InfoCenter and Extensions
- ✓ Integration with several reputable digital signature providers



Use cases and demos

Approval

Standard document approval

Contract

Renewal and Expiration

Digital Signing

Sign your docs with DocuSign

Content Creation

Forms and Templates

Use cases



Human Resources

Enable your HR department to drive crucial processes as on- and offboarding - directly from their eDOCS UI. Add a digital signature step, and the process is automated



Contract Management

Set the due date and follow-up date on your contracts, and experience how eDOCS Assist ensures you never miss a due date again.



Retention & Archive

Are you storing unauthorized data, or is your server just cluttered? eDOCS Assist can help maintain a clean and organized database, ensuring you comply with governing policies and expectations.



Content Creation

Using a form, input from end-users, or other sources, eDOCS Assist is capable of generating documents for you.

By adding a document template (Word), Assist will automatically complete the document, ensuring you save both time and money while allowing you to concentrate on your priorities.



Metadata Changes

eDOCS Assist is closely connected to your eDOCS profile forms and can modify all the metadata you require through a streamlined process.

For example, if you wish to assign a new document owner, Assist can accomplish this seamlessly during the workflow.



Set Document Status

Have you ever considered whether you can automate the "Publish" and/or "Read-Only" actions in eDOCS? Now you can!

Create a procedure for your end-users while you and your team focus on the next version. All directly through eDOCS Assist.



Update Security

A fundamental cornerstone of eDOCS is the extensive security that can be applied at the document level. With eDOCS Assist, you can modify security settings throughout the process. Want the security of a document to change upon process completion? That's possible, right out of the box!



Sign documents

eDOCS Assist features seamless 2-way integration with DocuSign. Initiate an signing admission directly from eDOCS InfoCenter, send it to DocuSign, and choose the signers.

Once completed, eDOCS Assist ensures the signed document and the certificate are securely saved in your eDOCS repository. Convenient and secure.



Be creative! Build your own

As an administrator, you can create and customize workflows in the designer. It's straightforward to learn and simple to use. Some technical eDOCS skills will be beneficial along the way.

Want to tailor workflows to different user groups or roles? As an admin, you can do this and much more. You can even perform workflow versioning.

Approval

Standard document approval

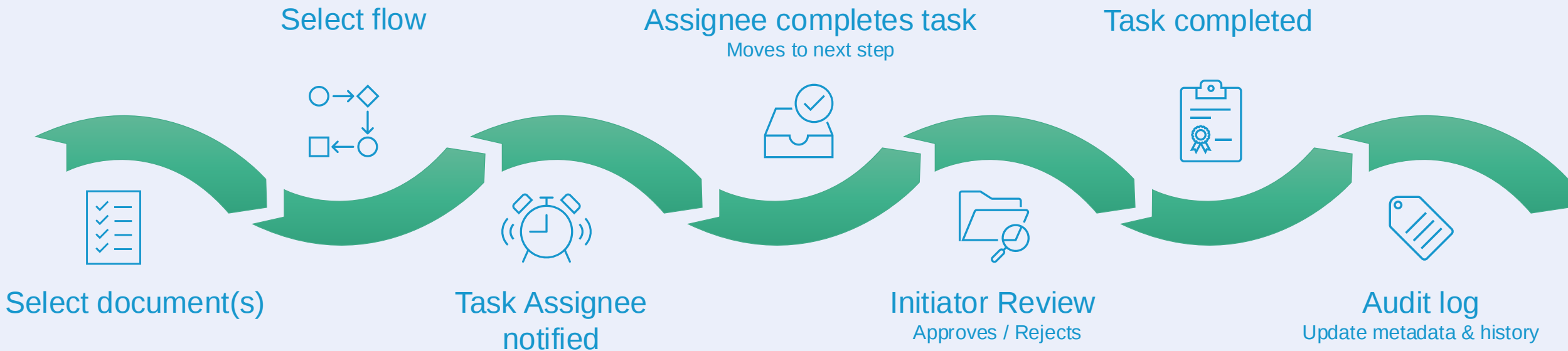
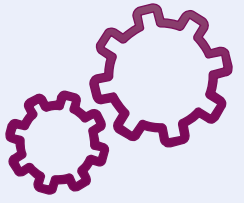
Business Challenge

- Content is emailed back and forth to review and make revisions
- Changes get lost in email threads
- No way to monitor progress. Manual process
- No insight into current state

Solution: Assist Approval Workflows

- Email notifications with secure links maintain versioning.
- Users can check progress and status online, saving time.
- Email reminders ensure critical dates are respected and content is delivered on time.
- Approvals are tracked with an audit trail showing completion and approval details.

Approval Workflow



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Business Challenge

- Risk of Human Error
- Time-Consuming and Resource-Intensive
- Limited Visibility and Tracking
- Scalability Issues
- Compliance Risk

Solution: Assist Contract Workflow

- Easily access contract links via email and InfoCenter notifications.
- Streamline data entry, approvals, and contracts to focus on high-value tasks and speed up the contract lifecycle.
- Gain full visibility into contract status, milestones, and bottlenecks with real-time insights and tracking.
- Assist scales with business growth, managing high contract volumes efficiently.
- Automated alerts and compliance tracking ensure deadlines and regulatory requirements are met, reducing legal and financial risks.

Contract Management in eDOCS

- Dedicated Contract Profile
- Dedicated contract User Group
- Dedicated contract Metadata
 - Contract Number
 - Contract Owner / Responsible
 - Contract Type
 - Part / Customer
 - Doc. Type
 - Start Date
 - Expiration Date
 - Follow-Up Date
 - Status (Active, For Review, Terminated)

Edit profile

PermissionsUnrestricted

General

*Document Name

Conference Floor Map 2024

2067

Contract

*Contract number

C0052204

*Contract owner

HAVARD

...

Håvard Wilhelmsen Degnes

*Contract type

Customer contract

...

Part/Customer

Contesto AS

...

*Document Type

KONTRAKT

...

Kontrakter og avtaler

*Start date

10/9/2024

Expiration date

10/17/2024

No expiration date

☐

Follow-up date

10/29/2024

Status

Enter text

...

Retention Days

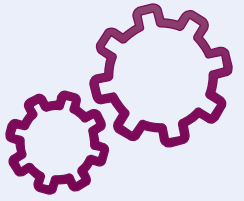
0

^ Required fields only

OK

Cancel

Contract workflow



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Document Signing Process

Sign documents with DocuSign

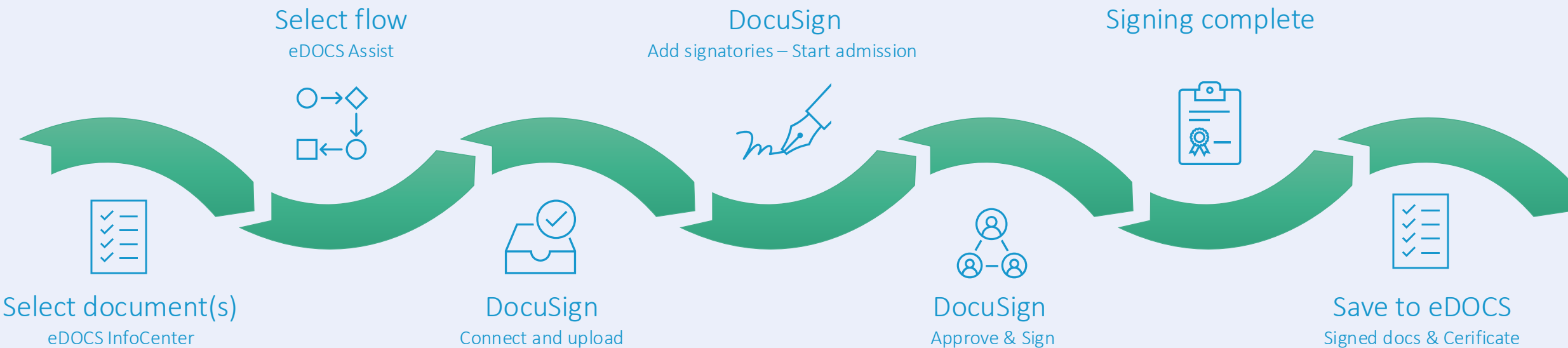
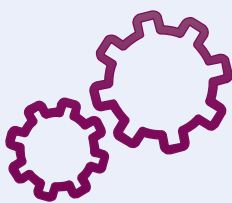
Business Challenge

- Time Efficiency
- Security and Compliance
- Accessibility and Convenience
- Environmental Impact
- Document credibility and control

Solution: Assist Signing Integration

- Digital signatures in eDOCS streamline signing and reduce turnaround times.
- Assist ensures document integrity and compliance with eIDAS and E-SIGN standards.
- Sign eDOCS documents anytime, anywhere, from any device using Assist.
- Digital signatures minimize paper use.
- Automatically store, organize, and retrieve business-critical documents in a centralized location.

Document Signing Process



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Content Creation

Create information and documents

Business Challenge

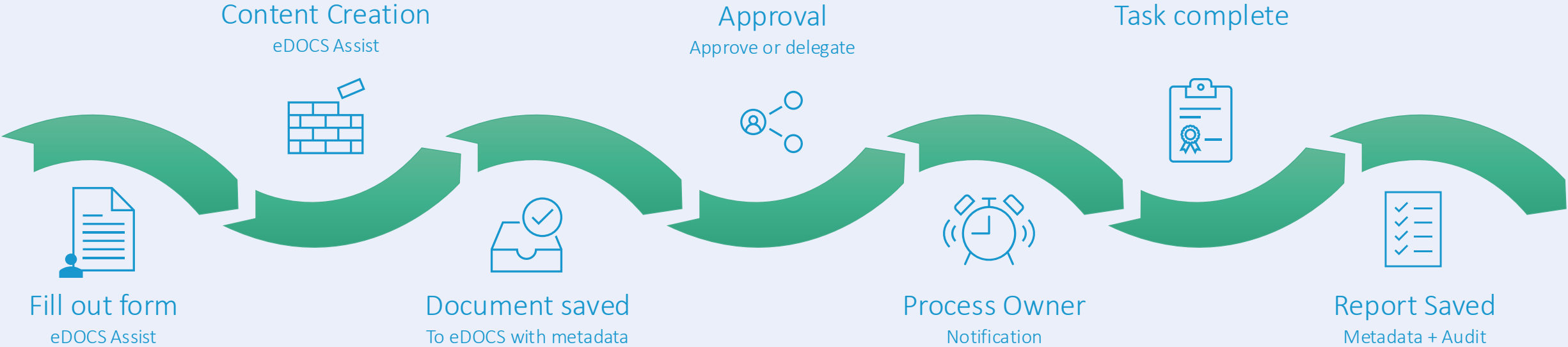
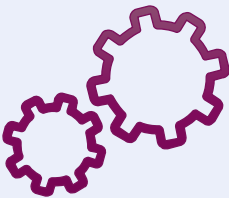
- Document creation is often slow and inconsistent.
- Form data is frequently unusable for other purposes.
- Strict standards and templates are required in regulated industries.
- Automating onboarding and offboarding is challenging.

Solution: Assist Workflows

- Automate document creation, distribution, and approval with frequently used templates in Assist.
- Streamline NDA generation and signing directly within Assist.
- Monitor and ensure compliance by tracking and compiling all actions into reports or records.
- Simplify onboarding with “Request to Recruit,” using staff inputs to auto-generate and sign employee contracts in InfoCenter.

Content Creation

Employee non-disclosure Agreement



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Want to get started?

- Reach out to your trusted partner
- Connect to your OpenText Account Executive
- Visit www.contesto.us for more information about Assist and Contesto

Look out for our follow-up email and join our community to stay informed and engaged - including new releases, development insights, and tailored webinar tracks for both customers and partners.

Questions