

eDMS and Office365 integration

Efficient collaboration under control

An Ennov Concept Note



Ennov Doc's integration with Microsoft® Office 365™ enables organizations to meet their compliance and information governance requirements, while leveraging the creativity and seamless collaboration made possible by Office 365.



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Abstract

Ennov Doc's integration with Microsoft® Office 365™ enables organizations to meet their compliance and information governance requirements, while leveraging the creativity and seamless collaboration made possible by Office 365.

Users benefit from Office 365's flexibility, while quality or regulatory departments ensure that important documents are secured, completely controlled and easy to find.

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Compliance and the Digital Workplace

Office 365 – the new standard for enterprise collaboration

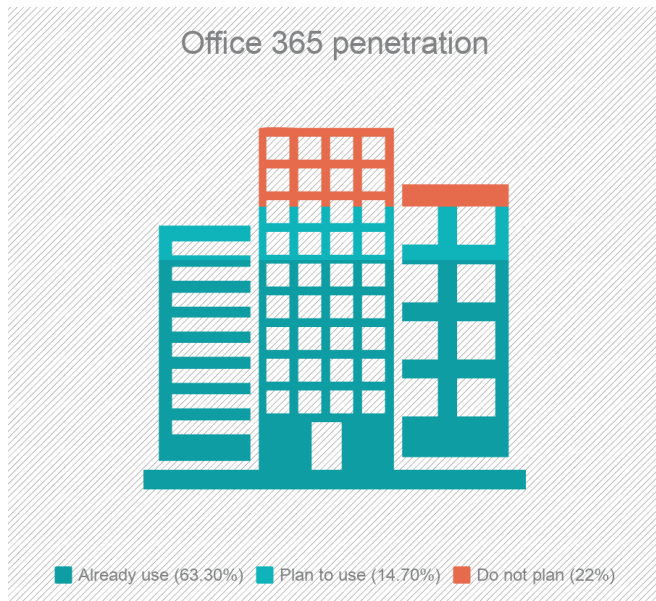
Companies create more documents than ever before, requiring collaboration between remote employees, suppliers, customers and authorities – often spanning great distances and multiple time zones.

Cloud-based productivity suites such as Microsoft Office 365 facilitate collaboration and increase both productivity and creativity. These solutions are quickly replacing desktop office suites at companies of all sizes and industry sectors as the following numbers indicate:

63.3% of companies use Office 365 today (Barracuda's May 2017 "Office 365 Adoption Survey").

78% of organizations use or plan to use Office 365 (Gartner's 2017 "Office 365 Industry Addressability Study").

> 100 million commercial monthly active Office 365 users worldwide (Microsoft's April 2017 "Office 365: Everything You Wanted to Know").



While Office 365 contains several different productivity solutions, Office 365 ProPlus and OneDrive for Business are among the most widely used.

Records still need to be managed strictly with an eDMS

Despite these impressive statistics, security, compliance and data governance still remain a concern.

Important documents represent a small fraction of all company documents, but they encompass critical company knowledge, processes information and intellectual property – from legal, regulatory, productivity and innovation standpoints.

Unfortunately, many companies still suffer from information silos that increase compliance and security risks and affect productivity and flexibility. Uncontrolled use of cloud-based productivity suites can make this situation even worse, especially if users stop using reliable but often burdensome EDM (enterprise document management) solutions.

To ensure **compliance**, important document life cycles must be controlled and managed, and access rights precisely defined and implemented.

In some heavily regulated industries such as Life Sciences, comprehensive audit trails and electronic signatures must be completely guaranteed (for compliance with the FDA's 21 CFR part 11 guidance).

Moreover, **efficient global collaboration** requires two things: robust searching to quickly locate important documents and easy and intuitive navigation to browse the global company document repository (thanks to controlled metadata management).

The necessary eDMS/Office 365 integration

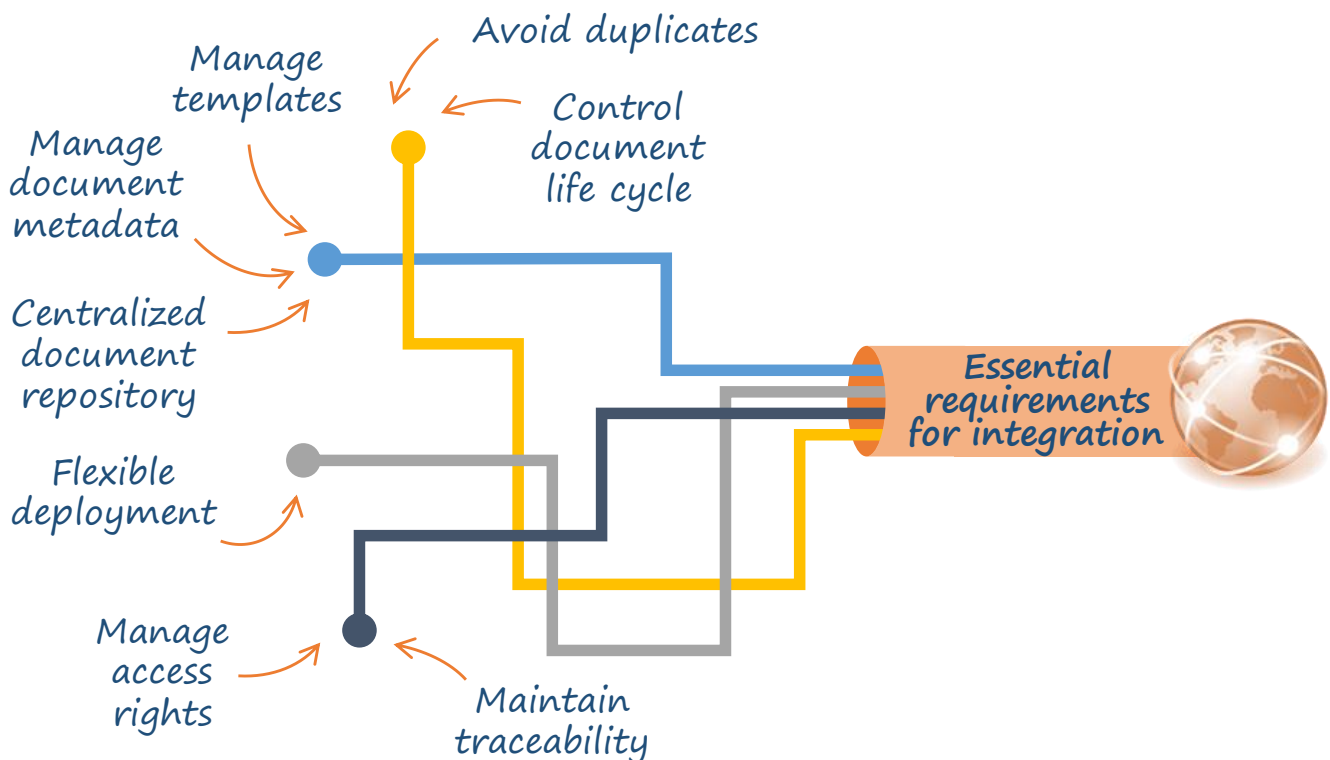
Efficient integration between the eDMS and Office 365 (OneDrive and Office 365 ProPlus) is essential to ensure compliance and increase productivity.

Office 365 is integration ready

Fortunately, Office 365 includes an open, published REST API that provides third party solution providers (as well as internal IT) with the ability to integrate their solutions with Office 365 over the web.

This enables Office 365 to be integrated into any on-premises, hybrid or cloud-based ECM environment. Some ECM solution providers have attempted to leverage Microsoft's Office 365 API to provide interoperability between their solution and Office 365 with varying degrees of success.

Defining the right approach



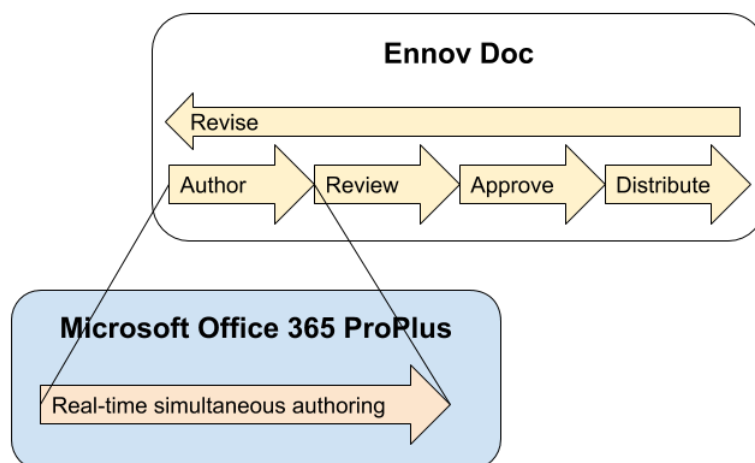
Ennov's 15 years of experience with Regulatory and Quality eDMS (especially in Life Sciences) has enabled us to define the ideal integration scenario that meets with these important requirements:

- **Flexible deployment:** MS Office 365 can be deployed on-premises or in the cloud. To ensure a controlled system validation is performed, it is important to have the ability to deploy the EDMS on-premises or in the cloud as well.

- **Centralized document repository:** Accessing all important documents from a unique centralized document repository is essential for secure controlled access, the elimination of duplicates, proper document version control and coherent and accurate document distribution.
- **Maintain traceability:** The integration must maintain the full traceability of critical documents. This as well as compliant electronic signatures are mandatory for FDA 21 CFR Part 11, so the integration must not compromise audit trail.
- **Manage document metadata:** Advanced EDM solutions provide the ability to automatically embed document metadata from the EDMS into MS Office (and rendered PDF) files. This capability eliminates redundant data entry, increases document quality and reduces cycle time. It is very important that this capability is not disrupted or degraded by the integration.
- **Manage templates:** Advanced EDM solutions manage document templates to ensure that important company documents are produced according to quality guidelines. The integration should support this capability.
- **Control document life cycle:** It is important that the EDMS retains full control of the document's life cycle and does not delegate this responsibility to the cloud-based Office 365 solution. This ensures full control of document life cycle management and associated processes.
- **Avoid duplicates:** It is important that the integration approach does not promote the propagation of duplicate documents in the EDMS and the Office productivity suite. This eliminates uncertainty and confusion for users regarding document status, avoids records management issues concerning controlled document destruction and also frees storage space.
- **Manage access rights:** Although users of productivity suites can always share documents if they wish (as well as send documents as attachments by email), the system's use should not needlessly encourage this type of document sharing., Instead, the system should promote control and enforcement of access rights from within the EDMS, where document security is fully managed.

Ennov Doc's "Master-Slave" Office 365 integration

Ennov has adopted a "Master – Slave" integration approach with Office 365.



Documents in draft mode in Ennov Doc can be authored collaboratively within Office 365. Once they are sent for review or approval, they no longer reside in Office 365 but are securely stored in Ennov Doc's repository.

Here is a more precise description of the optimal user scenario:

- The creator (issuer) of the document creates the document in Ennov
- He decides that the document's content will be authored in Office 365
- The document template (or the existing Office document file) is used to automatically create an Office 365 document
- This Office 365 document is automatically accessible in Office 365 by the Ennov document's co-authors (Ennov directly manages Office 365 access rights through Microsoft's API)
- Co-authors can share the document if they wish with non-Ennov users
- Users can leverage the real-time simultaneous editing capability offered by Office 365
- Once the document's draft phase is finished and it is sent for review or for approval, the Office 365 document is automatically removed and uploaded to Ennov. The document is then managed the same way as any other document in Ennov Doc.

For more agility

Thanks to Ennov's Office 365 integration, users are able to leverage Office 365's collaborative capabilities and at the same time ensure that important documents are well managed and comply with company policies, quality procedures and regulatory requirements, even in heavily regulated industries such as Life Sciences.

Cloud-based Office suites foster collaboration, increase productivity and employee satisfaction. They are an essential part of the future digital workplace. If well thought out, careful integration of cloud-based Office suites with EDMS solutions will make the enterprise more agile while complying with the ever increasing regulatory standards and quality requirements.

For more information

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