



btmSOFTWARE

Closing the Loop

OFCbridge

OFCbridge is a tool providing the automated synchronisation between properties of Microsoft Office documents with their meta-data stored in the Documentum Repositories.

The attribute synchronisation tool for Office documents

OFCbridge is a tool providing automated synchronisation between properties of Microsoft Office documents with the metadata stored in Documentum Repositories.

Users of documents outside the controlled document management system normally don't have access to business critical attributes like version number or approval status, unless these attributes are inserted manually in the document, which is a tedious and error prone process.

It becomes an even bigger challenge, when these attributes change their value. In order for the user to see the current attribute value, these documents need to be updated, or rather synchronized with their values as they reside in the metadata of Documentum.

OFCbridge takes care of this synchronisation of your Office documents. The values of the (custom and standard) properties stored with the Office document are synchronised with the properties' values stored in the Repository.

These Office properties can be made visible by printing them in the content as well as in the header and footer of the Office document.

This way, the metadata also becomes a visible and reliable attribute, when the document is distributed to and used outside the controlled document management system safeguarding quality.

The Context

Many organisations exchange large amounts of documents with users outside the controlled world of a document management system.

The attribute information (or metadata) is no longer accessible, when a document leaves this controlled environment. Imagine a user gets a printed copy of a document on paper. The content might contain the latest version, but as the content does not show what the version of the document is and its state in the approval cycle, the users can't tell.

Think of the situation where you are developing a production line, a new recipe or a new financial product and are handing out documents to users who don't have access to these critical attributes. It is easy to understand that major problems will appear because of the missing attribute information. If somebody uses a draft document as an approved document, this will most certainly result in severe errors.

One way to solve this problem is, to insert the attribute values into the documents manually. However, in the case of many documents this is a tedious job costing time as well as being a serious resource for quality issues. It becomes an even bigger challenge, when the attributes of the documents in the repository change: now also the attribute values in the content have to be updated in order to show the most current information. Synchronisation in the case of a manual process becomes undoable. On the other hand, we need the current information as a part of the content.

The Solution

It is obvious that such synchronisation of the values between the meta-data in the document management system and the Microsoft Office documents has to be done in a controlled and automated fashion. OFCbridge is the tool that takes care of this synchronisation.

OFCbridge takes the custom and standard properties' values for the Office documents from the meta-data stored in the Docbase, makes the necessary changes to the content/properties and puts the document back into the repository. The reverse way, where the properties' values in the Docbase are updated with the values of the document properties is also supported by OFCbridge. After the synchronisation, all actions on the document (e.g. view,

print, export, etc.) are done on the updated document.

Business Benefits

OFCbridge synchronises the attributes of your Office documents. This way, documents used outside control document management environment, can still be handled in a controlled way.

The significance of OFCbridge to your business:

- *Reduced risk: the user can be sure he is using the correct document.*
- *Saving significant cost on re-work.*
- *Saving significant cost and errors on manual synchronization.*
- *OFCbridge is easily installed and configured saving investment in services.*

Technical Features

OFCbridge uses the standard Microsoft functionality Standard and Custom Document Properties. Thus, no additional software is needed.

OFCbridge can handle requests for the rendition of the synchronized document.

The mapping between the Custom Document Properties and the metadata is configured and handled via standard XML-technology, giving the customer maximum flexibility.

Supports 2-way attribute synchronization:

- Microsoft Office document properties can be updated from Documentum's meta-data
- Documentum meta-data can be updated from the Office document properties

Audit trails can be switched on to log document changes.

OFCbridge supports Microsoft Office Standard Properties. By default, Microsoft Office documents are associated with a set of standard properties, such as author, title, and subject. You can specify your own text values for these properties to make it easier to organize and identify your documents. For example, in Word, you can use the Keywords property to add the keyword customers to your sales files. You can search for all sales files with that keyword.

OFCbridge Supports Custom Properties. You can define additional custom properties for your Office documents. You can assign a text, time, or numeric value to custom properties, and you can also assign them the values yes or no. You can choose from a list of suggested names or define your own.

OFCbridge also supports properties stored in the header & footer of a document.

OFCbridge is able to handle several Docbases at a time.

Supported Microsoft Office formats: Word, Excel and PowerPoint.

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