

ECM Wise Presents: ECM Footers - for Livelink (Version 5.3)

A powerful Microsoft Office add-in to enable Enterprise Content Management Footers for OpenText Livelink.

What is ECM Footers for Livelink?

Being able to correctly identify what electronic or paper document you are looking at is crucial to ensuring the right documents are being used. User manual entry of footers for documents and not having a common standard for footers leads to confusion and increases the chance of losing or incorrectly updating documents.

Being in the information age, most organizations have vast repositories of both structured and unstructured data. This data comes in many forms including documents such as contracts, spreadsheets, and presentations.

Today there is no easy way to automatically have your documents from an Enterprise Content Management system (such as SharePoint, and Livelink) display vital information about your documents in their footers. In large and constantly changing organizations - having metadata information such as the Document Identifier, version# and the folder path becomes increasingly important in locating and identifying documents.

Quick Overview:

- Enable Footers for Word, Excel and PowerPoint
- Display the Livelink Document ID, Path and Version #
- Display Livelink Category metadata in Word Footers
- Customize your Footer field labels, and font formatting for Word documents
- Basic and simple Footer entry for Excel and PowerPoint
- Works with Enterprise Connect or WebDav module

Enable ECM Footers - for Livelink

ECM Footers is an add-in for Microsoft Office 2007 and 2010 which currently includes support for the major applications of Word, Excel and PowerPoint.



The add-in allows users to expose the Livelink metadata of the Document ID, version#, parent folder path and document name in their document footers.

With ECM Footers, users just create a new document by saving it to Livelink, and then enabling the Footer to appear as configured.

User Adoption and Ease of Use

Organizations realize value from their investment in Livelink only if they are successful at getting users to actually use the toolset. Windows shared drive users often find it awkward to use footers in their documents as it is difficult to have the Livelink metadata appear in the footer. Likewise manual entry of footer metadata is slow and difficult to maintain.

ECM Footers exposes the Livelink metadata and allows users to use the information in their document footers. The footer metadata can be automated and synchronized as your documents evolve. By reducing the confusion and making it easy to expose metadata in document footers, ECM Footers encourages users to make Livelink part of their everyday work routine.

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Technical Requirements:

ECM Footers - for Livelink 5.3 works with:

Livelink Server Configuration

- Livelink ECM Enterprise Server 9.7 and 9.7 SP1+
- Content Server 10

Livelink Client Configuration

- Enterprise Connect 10.2.X, 10.3.X
- OR WebDav

Operating System:

- Windows XP SP2, Windows 7
- Microsoft Office 2007 and 2010 (Word, Excel, PowerPoint)

Administrator privileges for the installation.

Enterprise Standard

With organizations spanning many geographical office locations and teams being spread out, it becomes increasingly valuable to organizations to employ common standards in their everyday work processes.

Having users manually enter and maintain a common document footer standard is a difficult task that is prone to user error and loss of productivity due to the time consuming nature.

ECM Footers allows the organization to adopt a common standard for footers for documents from Livelink. Once enabled in a document the footers would be maintained and enabled for everyone in the organization that has ECM Footers installed.

Summary of Key Features and Benefits

The primary goal of ECM Footers is to make the value of Livelink footer metadata available to users in the most natural and intuitive way.

Allow users to find their documents with increased ease and enhance end-user productivity!

What's New in Version 5.3:

Support for changing font and font size in Word ECM footers
Support for custom date format in Word ECM footers
Support custom labels for footer fields in Word footers
Advanced logging and additional optimization enhancements

ECM Footers provides enhancements that expose Livelink metadata in document footers with the following **benefits**:

Add the Livelink Document ID to your footer
Add the Livelink document name to your footer
Add the Livelink version # to your footer
Add the Livelink parent folder path to your footer
Display Livelink Category metadata in your Word Document footers
Allow full customization of your Footers in Word using Office Document Templates
Existing documents without an ECM Footer template can be prompted to insert the footer
Option for footers to be automatically updated upon detection of change (such as a new version or parent folder path change)
From Word, Excel, and PowerPoint – users can find / locate a Livelink document given it's document id
Enables the identification of paper documents and the corresponding originals from Livelink
Enable enterprise/company wide use of Document Ids
Enable your organization to easily find documents
Enable the ability to enforce a footer standard for your organization
Easy to use for end users

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Figure1. Screen capture of the ECM Footers functionality in Microsoft Word 2007

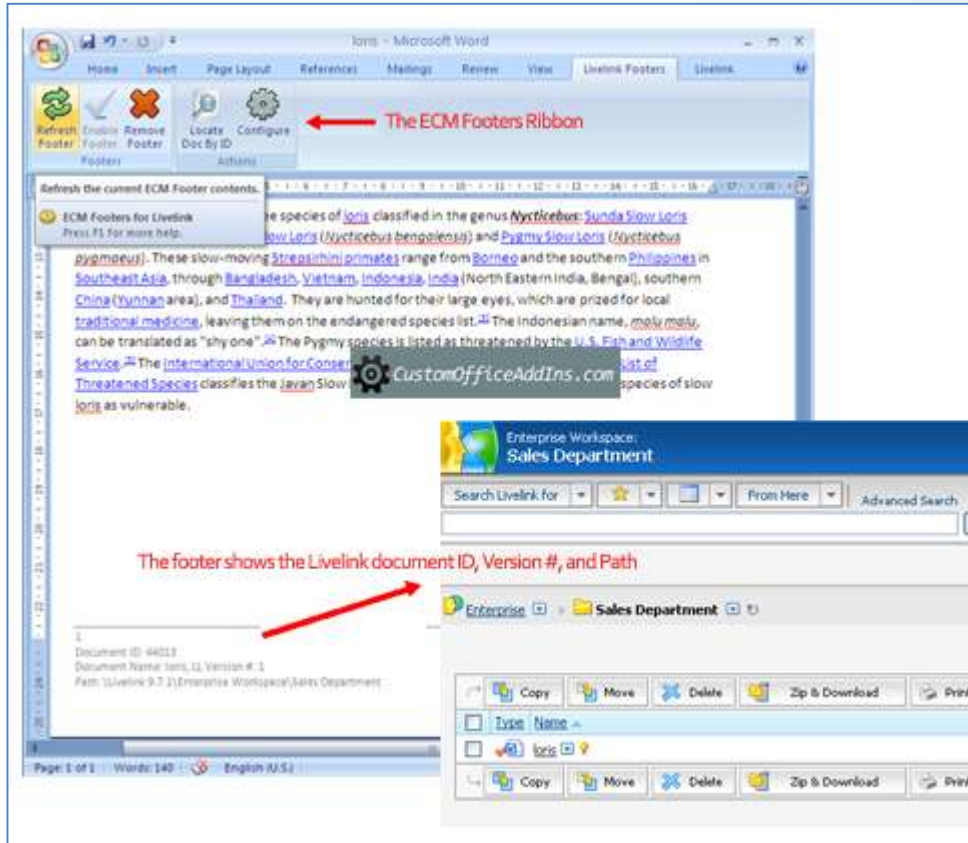


Figure2. Screen capture of the ECM Footers prompting to add the footer in Excel 2007.



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