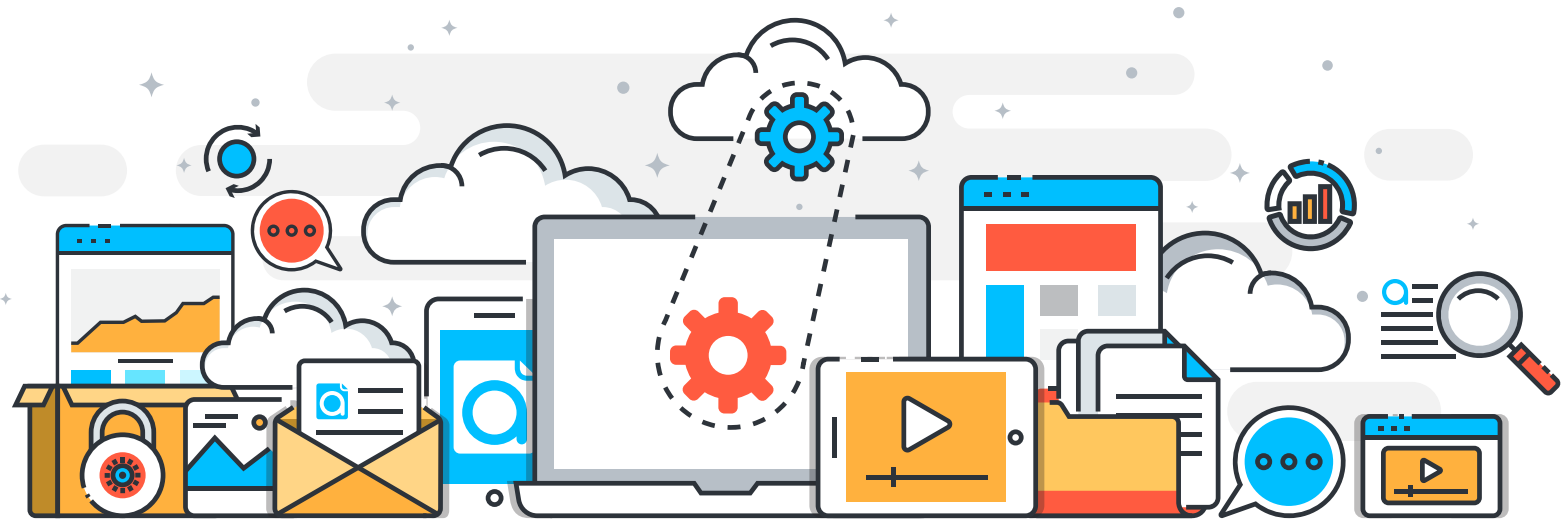




Making document collaboration work in the digital workplace

Reduce risk while reaping the rewards of increased productivity

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Technology has transformed how teams collaborate – but not always in a good way

The rise of software-as-a-service and cloud-based apps has enabled organizations to become more agile and flexible.

Knowledge workers, the employees who create and share ideas to improve the business, solve problems and spot opportunities, can now communicate in unprecedented ways and collaborate more effectively with colleagues in other departments, other offices, other countries or even other companies.

No longer chained to their desks, employees can work on the go, from anywhere. Organizations are no longer required to spend significant amounts to purchase software outright, but instead benefit from the financial flexibility offered by subscription services.

But this flexibility has led to an explosion in the number of available content creation tools, content repositories and collaboration tools. Where collaboration used to happen primarily over email, a team can now use a range of tools to work together, from instant messaging apps to cloud sharing platforms to workflow management systems.

But more often than not, one department selects one set of tools and apps suited to their needs, and another department signs up to a different suite for theirs.

As the organization's toolbox becomes more cluttered, collaboration between departments becomes more difficult, and information becomes siloed. This makes the organization less flexible and less responsive. As the number of subscriptions increases, cost savings also start to evaporate.

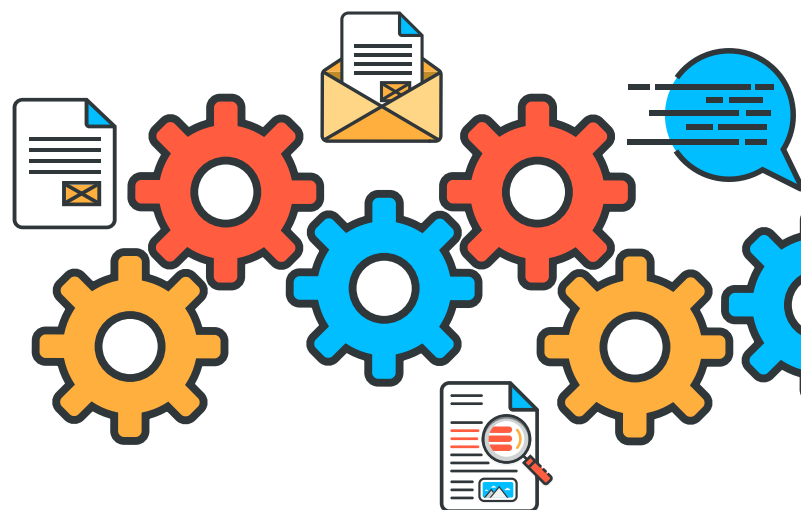
Today's collaboration tools don't work for documents

But even within a team, the sheer number of tools being used can make collaboration more complicated. That's because these tools and apps are only capable of supporting one or two elements of the collaboration process, such as chat or file sharing.

This causes problems when it comes to documents. The modern workplace runs on documents. It's our preferred method of creating, sharing and storing knowledge, especially when this knowledge needs to be widely disseminated or filed for future reference.

Users and teams might spend anywhere from a few hours to several months working on a document. Over that time, they will end up using several different tools. They might create a document with one tool, then use another tool to share it with their colleagues, before using different apps to discuss, review and verify the facts and any changes for accuracy.

All these different tools claim to help teams work together but instead of fitting together seamlessly, these tools act as separate point solutions. This ends up making collaboration more complicated - not only for the users, but also for those in the organization who are responsible for digital transformation, security and compliance.



Information silos and multiple apps hamper productivity and efficiency

At the user level, siloed implementations mean that it's incredibly difficult to find the right information at the right time.

Searching across chat histories and email exchanges to find specific documents or discussion points is time consuming and frustrating at best, impossible at worst.

When a team makes a decision about a revision or a change through discussion in a messaging app, it can be difficult to keep track of whether the change has been made in the document. Once a change has been made in a document, it can be impossible to find the original discussion where the change was agreed.

Users struggle to keep track of which versions of which documents have been uploaded to which platforms. Employees spend too much time switching between apps, breaking their focus and productivity. Each new tool means new policies, procedures and training, making user adoption an ongoing struggle.



Uncontrolled sharing and storage create security and compliance risks

The proliferation of collaboration tools, and the challenges around user adoption, mean you're left not knowing where your organization's documents are stored, or how they have been shared. This creates serious risks in terms of data loss, confidential documents being stored in insecure locations and devices, inability to easily comply with regulations and data privacy laws globally and inability to effectively apply corporate governance techniques.

Analysts, such as Gartner, estimate that upwards of 80%^{*1} of data stored by organizations reside in unstructured formats (such as documents and chat). Of this 80%, 80% is believed not to be managed. This creates critical risks from a cybersecurity perspective, as hackers are switching emphasis to target confidential information residing in documents.

For example, your team may take financial data from an ERP system, in order to prepare earnings reports and press releases ahead of earnings announcements. This draft may be shared using email or a cloud file sharing service, before being approved and made ready for distribution.

ERP systems have strong security and identity controls when data resides within the system. However, once users share documents externally in an email attachment, "outside the firewall," or in poorly secured cloud sharing platforms, this data becomes vulnerable to hackers. In today's workplaces, where employees are constantly sharing documents inside and outside the company, these risks multiply and quickly become unmanageable.

As many as 80%^{*1} of organizations have very little knowledge of what is happening across documents stored within their environment. In addition, they do not know what lies in these documents or even who owns them. This is especially worrying when we consider the requirements for organizations under the General Data Protection Regulation (GDPR). If any consumer data stored in documents is exposed during a breach, your organization could be facing significant penalties.

^{*1} *The Big (Unstructured) Data Problem. 2017. Forbes.*

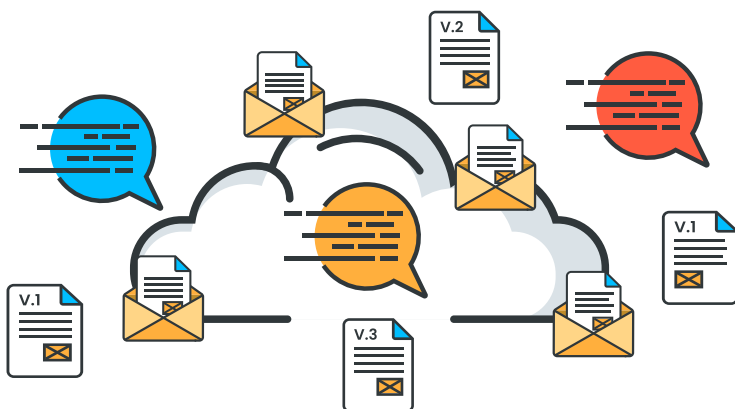
Finding a balance between employee productivity and organizational control

Your organization could put in place a monolithic document management system that stores all documents produced by the company. However, teams like the freedom to collaborate in modern ways and resist changes to their existing working practices.

Any solution must provide your employees with the flexibility they need to collaborate easily and efficiently. Otherwise users may end up bypassing restrictive systems when they get in the way of getting things done - for example, sending documents as email attachments, or storing them outside the company on cloud file and share systems.

When tools are intuitive to use, and designed to reflect your workforce's real life working practices and behaviors, they are easier to adopt. Employees use the tool more and see the benefits sooner, accelerating uptake. Engaged employees drive digital transformation, unlocking business value as they become more efficient and productive.

Today's workforce wants smarter collaboration and communication. Your organization must make it easier for teams to work together, while also maintaining the security, compliance and good governance of your documents and information.



*2 State of the digital workplace Report, 2017. Produced by CMS Wire.

Delivering for the digital workplace

The digital workplace is an integrated collection of the digital tools, provided by an organization to make their employees more productive.

Today, many organizations have a joined-up strategy in place to manage the effective implementation of these tools. In a recent digital workplace Survey*2, 43.9% of respondents said that their organization had a digital workplace program or function.

Tomorrow, these initiatives will become more common as employees increasingly expect workplaces that are digital by default. Organizations will look to balance the opportunities created by new technologies with the need to manage challenges around governance, compliance and security.

But while digital workplace initiatives are driving business transformation, they are still falling short when it comes to improving document collaboration and management.

In the digital workplace Survey report, 75% of respondents believed that document management capabilities are very important but well over half said their current tools needed improvement. 77% believed that chat and collaboration tools were very important and but 40% said their current tools needed work.

In an era when information stored in documents and collaboration is more important than ever, we are simply failing to deliver the solutions demanded by today's tech savvy workforce.

This substantially limits the effectiveness of any digital workplace strategy, for both the user and the organization.

You need smarter document collaboration that's designed for the digital workplace

We understand this need for user flexibility on the one hand, and greater organizational control on the other. That's why we've created Annotate, one platform that gets everyone in your team working together seamlessly, from first draft to final sign off.

Unlike a suite of point solutions, where each tool focuses on one element of the collaboration process, Annotate has everything your team needs to guide a document through its whole lifecycle. We see this lifecycle as having five phases: Create, Share, Discuss, Review and Verify.

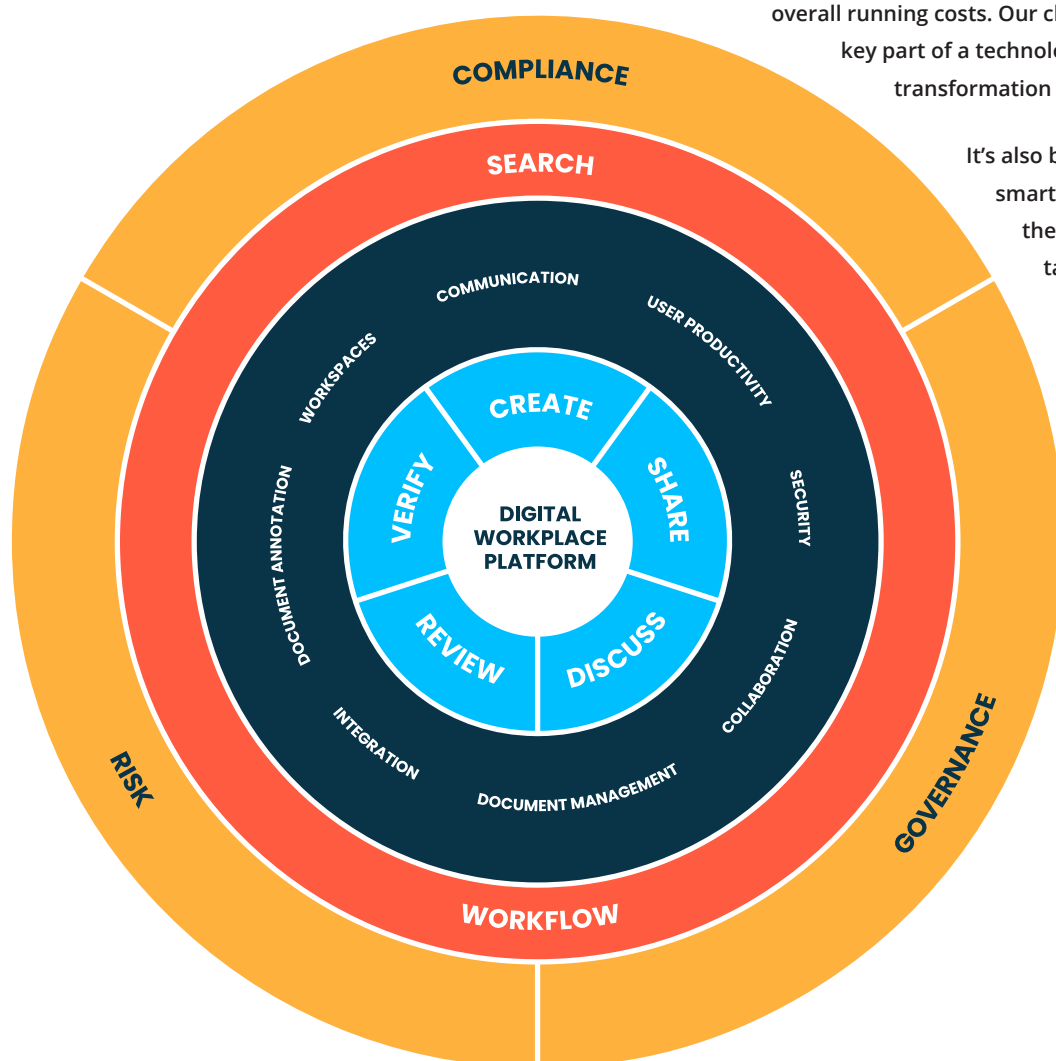
A single platform to take your documents from first draft to final sign off

Instead of using one tool to create documents, another tool to share them, another to discuss changes, and yet another to review and verify the final draft, Annotate allows you to take care of all these tasks, in one place.

We've designed Annotate this way because it fits with how your team actually works with documents. Instead of having to adopt complicated new procedures and ways of working, Annotate is intuitive to use, for teams of all shapes and sizes.

With Annotate, you can replace certain point solutions in order to streamline your business, reduce information silos, standardize collaboration, enable compliance and reduce the overall running costs. Our clients have used Annotate as a key part of a technology rationalization and digital transformation strategy.

It's also built to help your team work smarter - to find the information they need, to keep everyone on task and to help them stay organized. And to provide your organization with visibility over how your documents are being stored and shared, improving compliance and reducing risk.



Annotate works how your team works

Collaborate from first draft to final sign off

Annotate offers teams everything they need to create, share, discuss, review and verify documents. Team members can chat in real-time within workspaces and on individual documents. Users can also collaborate within the document itself, through discussions around specific sections, paragraphs, sentences and words. Annotate supports collaboration on any document type, reducing the need for multiple versions in different software formats.

Access your documents from anywhere, at anytime

As employees increasingly spend more time away from their desk, or even away from the office, they need to be able to take the right tools and documents with them on mobiles and laptops. Annotate's mobile and desktop apps will provide access on the go, whether a user is online or offline.

Get the right people involved

Invite a specific group of users to create content, share, discuss and collaborate in an Annotate workspace. Documents within workspaces can be organized into folders and users can be provided with granular access rights and functional privileges. This allows you to bring the right team together for your project and manage their roles and responsibilities.

Minimize disruption by integrating Annotate with your existing tools and systems

While Annotate is designed to serve as a single platform for document collaboration, it also integrates with your existing tools and document repositories. This allows you to manage change within your organization by phasing tools out over time, or continuing to use them as required.

Annotate has been designed around open principles, enabling the platform to plug seamlessly into your existing architecture and existing technology investments. For example, integration into MS Office allows users to open and edit files in these formats directly from within Annotate.

Annotate helps your team work smarter

Gather the right content together to create your first draft

Draft documents directly in Annotate and collaborate throughout the authoring process. Link or copy sections from other documents into new documents while preserving the links, or draw directly from transcript files.

Keep your team on task by creating workflows

Unlike other systems that rely on trained experts to write a set of workflows for the users, anyone can easily assign tasks and create workflows in Annotate. Users can create workflows at the document level, but also within the document itself, for example assigning team members to review specific sections of a document.

Receive real-time notifications of relevant changes

Instead of mass emails or chat threads, Annotate allows you to choose who is notified about updates and changes to a document. Users can receive notifications via mobile, email and chat on any device, whether they are inside or outside the organization.

Find the right information and documents quickly and easily

With all of your documents saved on one platform, users can search across all documents and discussions to find the information they need. Users can drill into search results by location, date, type and various other pre-defined or automatically created parameters.

Keep your documents organized and in one place

Annotate provides enterprise document management capabilities such as metadata management, syncing documents from local devices, document tags, version control and retention policies. Integrate other content management solutions into Annotate through an extensible API. Your organization can also select whether Annotate or another document repository is used as the primary document store.

Annotate helps your team stay compliant and reduce risk

Know where your documents are stored and shared

Maintain visibility over all information assets stored on and integrated with Annotate.

Because restricted access can be granted to users outside the organization, users don't need to share documents outside the platform. This replaces email attachments and file sharing services, enabling collaboration without dramatically changing working practices.

Keep your documents and information secure

Annotate supports user management and access control through industry standard such as OAuth2, Active Directory and SAML based SSO. Other capabilities include access control lists on both documents and folders, retention policies, workspace user management, user groups, custom roles and user functional privileges. Annotate also provides full end-to-end encryption on documents and chat.

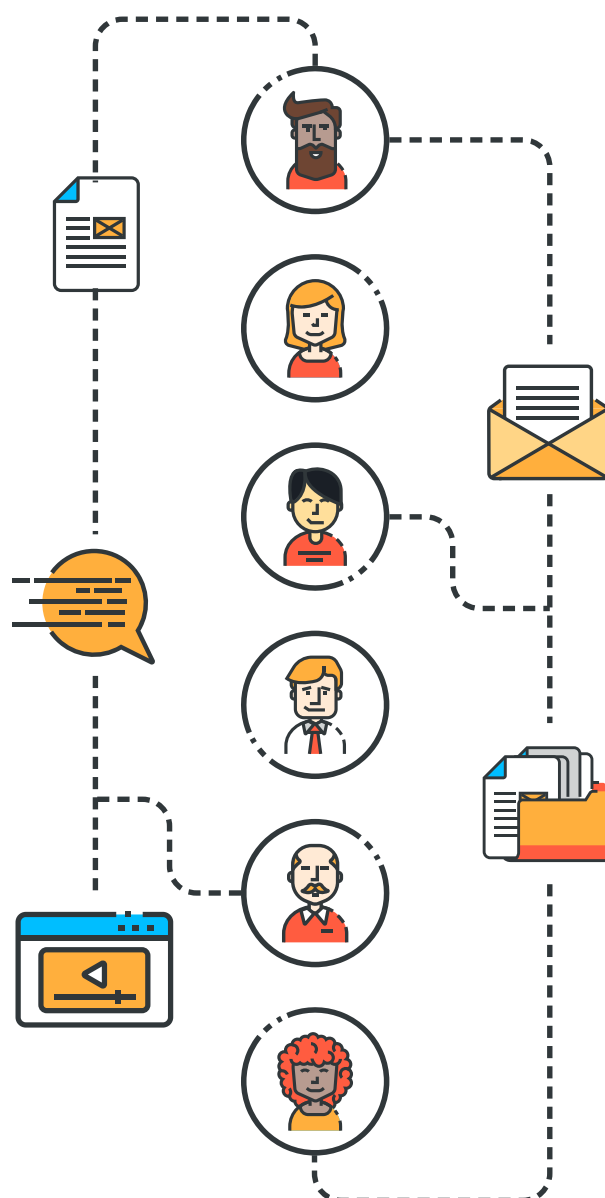
Deploy Annotate in an environment that meets your security and regulatory requirements. This may be on your own private cloud environment, within your data centers, in the cloud or within a hybrid environment, or in a particular geographic region.

Stay compliant and ensure good governance

Knowing where your information and documents are stored, and who can access them, enables your organization to reduce risk and adhere to regulations. Annotate has all the tools you need to adopt good corporate governance practices and maintain compliance, such as the ability to export chat and document notes relating to a particular user or topic.

Annotate's vision for smarter document collaboration

We're working together with our technology partners to deliver everything your team needs to take a document from first draft to final sign off. We think the best way to understand this process is to break it into five phases: Create, Share, Discuss, Review and Verify. We are continuously enhancing and developing features to support each stage in this document lifecycle.



Create:



Document Drafting

Draft documents directly in Annotate. Paste and/or link in content from any document. View and collaborate with other users while drafting documents.

Automatic Document Creation

AI and intelligent automation can suggest and paste in content from other documents in context to the subject being discussed.

MS Office Integration

Open and edit documents, such as Word, within Annotate. Copy notes, created in Annotate, into Word and when the user saves the file, save it back directly into Annotate as a new version.

Audio/Video Capture

Enable audio and video to be captured on mobile and other devices and directly saved into Annotate and automatically transcoded.

Automatic Transcription

Improve transcription accuracy by enabling advanced speech-to-text conversion with in-built and self-learning AI Personal Language Models (PLM).

Share:



Secure Document Share

As an alternative to insecure FTP, SFTP, emailing attachments or cloud file sharing systems, share and transfer documents of any size easily and securely with built-in audit, notifications and retention policies.

File Synchronization

Bi-directional syncing of files and notes on documents from your laptop directly into Annotate.

Workspace Templates

Improve efficiency, governance and security by creating templates to save frequently used workspaces elements such as the folder structure, metadata definitions, document and note tags and user permissions.

Mobile and Desktop Apps

Mobile and desktop apps enable users to collaborate on the road in both an online and offline experience. When offline, accurately sync any changes to documents or notes back into Annotate and automatically perform conflict checking and resolution.

Discuss:



Workspace Chat

Initiate a discussion around a specific subject, project, organize an event, review documents and much more. Automate your team's routine tasks to make them more productive and ability to integrate third party apps into chat.

Document Chat

Chat around individual documents stored within a workspace including the ability to edit, reply and delete messages and automatically create links to document notes.

Section Mark-up

Tagging important sections of documents that can then be allocated to other users to create, share, discuss, review and verify as part of an overall workflow.

Document Annotations

Collaborate not only at the document level but also inside the document at the paragraph, sentence, phrase or word level. Create different notes, allocate these notes to different users or user groups, discuss these specific notes and resolve issues at the specific place in the document.

Audiovisual Annotations

Create notes and tag multimedia files in the same way that you would on normal documents.

Review:



Universal Document Viewer

View just about any document on any suitable device, with no plugins, or even installing the application in which the original document was authored. Perform document comparison to understand the differences between two version and review two documents through the document viewer in parallel. Documents can also be redacted.

Audiovisual Viewer

Play and review audio and video files within the Annotate platform.

Document Tags

Classify documents based on user defined categories.

Note Tags

Classify notes on documents into specific categories to improve organization, filtering and allocation to specific users or groups.

Transcript Editing Tool

Although automated speech to text can be very accurate and this accuracy is improving all the time, there is still the requirement to edit transcripts quickly. Annotate's transcript editing tool supports components such as a foot pedal to increase the speed and accuracy of the editing process.

Verify:



Delivering document collaboration that works for the digital workplace

With access to a full suite of collaboration tools in one platform, your organization can reduce information silos and improve compliance and security. Employees have the flexibility they need to create, share, discuss, review and verify documents with ease, while your organization maintains visibility of where these documents are being stored and shared. And by reducing risks to the organization while increasing the rewards of employee engagement and productivity, you can achieve a culture of smarter collaboration that drives greater business performance.

Assignments

Assign tasks to individual users to review and verify documents or specific note categories.

Content Extraction

Extract specific content from documents in order to form structured information from unstructured text. Content extraction can include names, places, companies and events as well as document categories and other analysis such as sentiment analysis on the full document or passages contained within the document.

Fact Linking

Link facts, sections of other documents, webpages etc at the appropriate point in documents. Annotate will automatically recommend links based on the text and context of selected passages.

Document Editing

Open and edit documents authored in other file formats such as PDF and MS Word within the drafting tool. Save the document back into the platform drafting format or back into the format of the original.

Accept/Reject

Assigning tasks to specific users is part of the workflow process. Included in this is the ultimate tracking of the various steps in the workflow and whether facts, actions and tasks have been accepted, resolved or rejected.

Find out how
Annotate's
smarter document
collaboration
can work for your
organization.

Try it for free today.

Annotate delivers smarter document collaboration that's designed for the digital workplace. But don't just take our word for it. Try Annotate for free by visiting our website:

www.annote.com



About Annotate

Annotate provides smarter document collaboration made for the digital workplace. We provide a single, secure platform that gets everyone working together seamlessly, from first draft to final sign off. Our intuitive, feature-rich solution is used to create, share, discuss, review and verify documents, by over 250,000 customers with household names such as: IBM, Samsung, FedEx and the University of Cambridge. Our customers use Annotate to support smarter collaboration for internal and cross-organizational teams, while maintaining compliance, security and good information governance.

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