# Open Text and Microsoft:

## Delivering on the Promise of a Holistic ECM Strategy

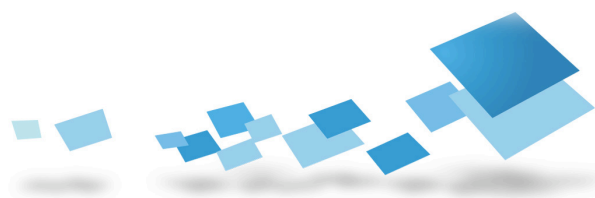Open Text and Microsoft
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**Abstract**

Enterprise Content Management (ECM) involves the capture, management, storage, preservation, and delivery of content and documents related to organizational processes. ECM tools and strategies allow the management of an organization's unstructured information, wherever that information exists. Open Text, the global leader in ECM, and Microsoft have worked closely together for more than a decade to create industry-leading ECM solutions. This white paper describes the "Better Together" approach the two companies have taken in creating ECM solutions to meet the spectrum of enterprise needs.

Highlights include: Enabling an effective, ECM-driven compliance framework; Aggregating content within business context while maximizing its value and minimizing the cost of managing it; and Easily deploying Microsoft SharePoint sites with built-in compliance and enabling tailored business applications.

# Contents

# Executive Summary

Enterprise Content Management (ECM) has grown into a major area of IT concern for organizations, a trend that is expected to grow with the passing of each year. Open Text, the global leader in enterprise content management, and Microsoft have worked together for more than a decade to create industry-leading ECM solutions. This white paper provides an overview of how Open Text and Microsoft are "Better Together" and at how they are working together to deliver on the promise of a holistic ECM strategy.

ECM demands organizational attention for a number of reasons, including:

- **There's a lot of content**. The School of Information Management and Systems at the University of California at Berkeley estimated that print, film, magnetic, and optical storage media produced in one year totaled about 5 exabytes, and that 92 percent of this information was stored on magnetic media, mostly in hard disks. How large is that? One exabyte equals 1 million terabytes. The Berkeley study noted that the Library of Congress holds 17 million books, and estimated that 5 exabytes would hold the contents of 37,000 of such libraries. The Berkeley study was done in 2002. Should the study ever be updated, the numbers would likely soar even higher.

- **Most content is unstructured**. While storage of relational data is easily accomplished with databases, most of the content enterprises store is unstructured, which is to say it is intended for human, rather than computer consumption, and in the form of documents, e-mails, presentations, audio, video, and other formats. Such content can be mission critical to an organization, yet remain difficult to process, search, and analyze. Some of the needs for the content seem contradictory. Content needs to be held securely, yet be easy to share. Organizations need to preserve content, which represents institutional process and knowledge, yet keeping non-regulated material for too long can increase the expense and liability that can come from legal discovery processes.

- **Regulatory requirements can play a role.** Recent years have seen legislative action around the world dictating new record keeping requirements for organizations. For many organizations this has meant a rapidly shifting regulatory landscape with increased enforcement efforts by regulators, increased responsibilities for chief records officers, chief risk officers and chief compliance officers, as well as increased litigation risks.

This helps explain why Gartner Inc., in its *Market Scope for Records Management*, (Kenneth Chin, September 10, 2009) wrote:

"By 2013, 50 percent of all Global 2000 companies will implement enterprise-wide records management solutions. By, 2013, records management will be pervasive and will extend beyond existing content repositories into the file stores, archive repositories and business applications. By 2013, discovery support will be a core capability for records management solutions."

The Better Together approach Open Text and Microsoft have pursued to create holistic ECM solutions was recognized by Brian W. Hill, who wrote in The Forrester Wave: Records Management, Q2 2009:

"In addition to solid records management capabilities and complementary solutions, Open Text's packaged integrations with SAP and Microsoft SharePoint make it a compelling choice for many enterprises."

And the pragmatic benefits of combining Open Text ECM technology with the Microsoft Application Platform was underscored by Doug Couch, ECRM Program Manager for Marathon Oil, who says:

"Our selection of Open Text as our ECRM standard includes an end-user interface strategy to integrate Microsoft SharePoint with Open Text's software, so employees can continue to work in Microsoft interfaces, while we implement the lifecycle management capabilities we need from Open Text."

## A quick look at Open Text ECM solutions

The official definition of enterprise content management was created by the Association for Information and Image Management (AIIM) International, the worldwide association for enterprise content management. AIIM International's definition reads: "Enterprise Content Management (ECM) is the strategies, methods and tools used to capture, manage, store, preserve, and deliver content

Open Text Today



*Figure 1. Open Text enjoys leading market share.*

Market Share: Enterprise Content Management Software, Worldwide, 2006-2008, Tom Eid and Bianca Granetto 5 June 2009. Gartner Inc.

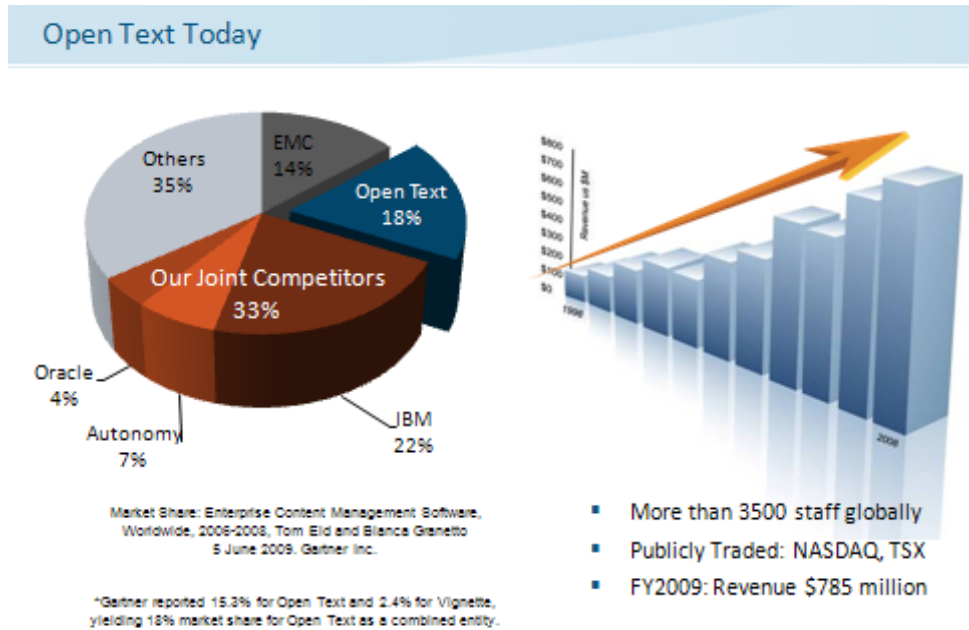*Gartner reported 15.3% for Open Text and 2.4% for Vignette, yielding 18% market share for Open Text as a combined entity.

- More than 3500 staff globally
- Publicly Traded: NASDAQ, TSX
- FY2009: Revenue $785 million

and documents related to organizational processes. ECM tools and strategies allow the management of an organization's unstructured information, wherever that information exists."

Open Text has used the Microsoft Application Platform to develop and deploy a range of ECM solutions that have helped it achieve leadership in the global marketplace. Open Text ECM solutions include:

- **Document Management**. Document Management provides the repository for business documents (Microsoft Office, CAD, PDF, and so on) as well as the organizing, displaying, classifying, access control, version control, event auditing, rendition, and search services for documents and their content.

- **Collaboration & Community Management**. Collaboration & Community Management offers a range of tools that facilitate people working with each other, with content, and with processes. These tools include project and community workspaces, real-time instant messaging, instant online meetings, screen sharing, wikis, polls, blogs, discussion forums, and more.

- **Web Content Management**. Web Content Management provides tools for authoring, maintaining, and administering sophisticated Web

sites that offer a compelling visitor experience and that integrate content from many internal and external sources seamlessly.

- **Records Management**. Records Management enables control of the complete lifecycle of content objects by associating robust retention and disposition rules with each content asset. These rules control if and when content can or must be deleted or archived on less costly storage media.

- **Email Management**. Email Management services enable the archiving, control, and monitoring of email to reduce the size of the email database, improve email server performance, control the lifecycle of email content and monitor email content to ensure compliance.

- **Capture & Delivery**. Capture & Delivery tools provide the means of converting documents from analog sources—such as paper or fax to electronic documents—and applying value-added functions to them, such as optical/intelligent character recognition (OCR/ICR), barcode scanning and so on, and then releasing them into the Open Text ECM Suite repository where they can be stored, managed, and searched.

- **Business Process Management.** Business Process Management (BPM) provides the tools for analyzing, deploying, executing, and monitoring the daily business processes in which content is referenced to make decisions and in which people make the decisions. BPM often involves interaction with other enterprise applications, such as those from SAP and Oracle.

- **Digital Asset Management**. Digital Asset Management provides a specialized set of content management services for ingesting, browsing, searching, viewing, assembling, and delivering rich media content types, including images, audio, video, Adobe Flash, and so on.

- **Archiving**. Archiving helps bring storage expenses under control through optimization of storage use. It manages content storage policies according to business context, harnessing the rich metadata of IT applications to optimize storage use—including de-duplicating and migrating data automatically through multiple storage tiers, leveraging less expensive media while providing high-end storage services to further reduce storage demands.

- **Content Reporting**. Content Reporting provides tools for analyzing content and generating reports on virtually any set of data and organizing and formatting data output for distribution to channels such as print, email, fax, Web sites, and portals.

The combination of Open Text ECM technology deployed on the Microsoft Application Platform, including use of Microsoft Office SharePoint Server, a Web-based collaboration solution, Microsoft SQL Server database software, and Microsoft Office productivity tools, enables organizations to meet the ever growing demands of content management across the enterprise.

The rest of this white paper examines the benefits of using Open Text and Microsoft solutions across three pillars of enterprise needs:

- **Pillar One**: Enabling an effective, ECM-driven compliance framework

- **Pillar Two**: Aggregating content within business context while maximizing its value and minimizing the cost of managing it

- **Pillar Three**: Easily deploying Microsoft SharePoint sites with built-in compliance and enabling tailored business applications
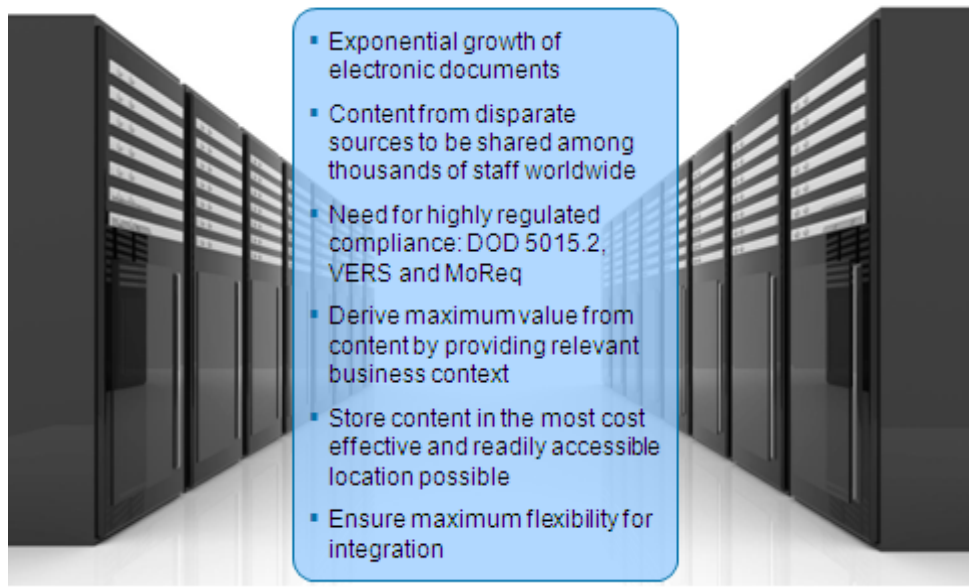
*Figure 2. Example of an organization's challenges.*



Challenges

- Exponential growth of electronic documents
- Content from disparate sources to be shared among thousands of staff worldwide
- Need for highly regulated compliance: DOD 5015.2, VERS and MoReq
- Derive maximum value from content by providing relevant business context
- Store content in the most cost effective and readily accessible location possible
- Ensure maximum flexibility for integration

# Pillar One: Enabling an Effective, ECM-Driven Compliance Framework

Organizations face an unprecedented level of pressure from mounting regulations, litigation, and the need for stringent corporate governance policies.

Business content—more specifically, the way organizations manage it—plays a big part in an organization's corporate compliance program, but as with the nature of compliance itself, establishing an effective and holistic Governance, Risk and Compliance (GRC) framework is not simple. What organizations need is a balanced approach; one that facilitates flexibility and ease of use for staff while ensuring that content is controlled in accordance with regulatory and corporate mandate.



*Figure 3. A balanced approach between value and liability is required.*

## The challenges

As an increasing number of industries become heavily regulated—and already highly regulated industries face new and modified regulations—the challenges related to compliance also grow. Organizations face daunting obstacles as well as significant risk and pain points when it comes establishing effective GRC programs across the enterprise. Included among these are:

- **Difficulty managing dynamic regulatory landscape**—significant changes to financial regulatory requirements in all parts of the world pose major challenges to organizations. Complying with proposed changes may require material changes to enterprise IT architecture, as the nature of compliance reporting, the scope of compliance related content, and the overall approach to regulatory compliance calls for a "framework" rather than a "piece-by-piece" approach to corporate compliance.

- **Lack of enough "lead time" for compliance officers and IT departments to act**—compliance groups, legal departments and IT require as much advance notice of changes as possible, due to long development time required to design and implement new solutions (IT) and assess, gather and analyze the content require to comply (compliance teams).

- **Lack of flexibility/adaptability to new or modified regulations**—organizations have typically deployed solutions that manage the compliance mandates of today and invest in solutions as required. What is required by organizations is an open, flexible framework that enables them to adapt to any shifts in the compliance landscape.

- **Challenges in explaining the compliance landscape and demonstrating corporate GRC policies that are in place**—proving to the board of directors and other stakeholders (including auditors in the event of an investigation and juries in the event of litigation) that all pertinent regulations are addressed requires vigilance in the way that organizations audit and report on policies relating to GRC and consistency with respect to how content that supports GRC is treated. In other words, the approach and related policies surrounding governance, risk and compliance content must be defensible. This is made possible only by a sound framework capable of collecting and reporting on the company's enterprise-wide GRC policies.

## The goals

Progressive organizations are investigating ways to break away from the traditional, manual, and cost-intensive approach to corporate governance, risk and compliance programs with the mandate: mitigate business and legal risk across the enterprise while ensuring compliance with financial reporting and other regulations as well as corporate policies.

In order to achieve this, organizations aim to:

- Ensure that regulatory compliance reporting mandates are met at the same time as ensuring privacy, security, and retention policies are fulfilled.

- Apply governance, guidelines, and structure to all content, regardless of location.

- Determine content that poses potential risk (and ensure that it is kept, preserved, or disposed of in a manner that mitigates those concerns and meets regulatory requirements), as well as content that is of value and should be kept in a manner that facilitates ongoing collaboration.

- Minimize costs associated with managing compliance related content by establishing a "holistic framework" for GRC.

- Incorporate business records from all sources across complex IT infrastructures and ensure that a common, auditable set of security and content access policies are applied to them.

## The Microsoft/Open Text advantage: a truly holistic enterprise governance, risk and compliance infrastructure

By complementing existing investments in their Microsoft infrastructure with leading ECM capabilities of Open Text, organizations realize significant value.

Specifically, organizations can avoid the time and cost associated with niche solutions that address GRC issues with a "point-to-point" approach by augmenting existing Microsoft resources.

Open Text delivers value to organizations looking to establish a rigorous, holistic GRC framework based on the Microsoft Application Platform along the following lines:

- A truly holistic enterprise governance, risk, and compliance infrastructure that leverages the Microsoft Application Platform and Microsoft Office system is provided. Open Text offers-industry leading enterprise content management capabilities in an integrated suite that enable organizations to reduce their risk and infrastructure costs by managing all content object types, from all sources, with common retention, disposition, and archiving governance policies.

- Open Text governance, risk, and compliance offerings are recognized across the industry as having unparalleled strength in integrating a large variety of content types including emerging persuasive content types (social, Web, digital/multimedia, etc.). Our SharePoint offerings specialize in bringing all of this content into the SharePoint common

workspace so that users can work on their content within their familiar Microsoft environment.

- Open Text's Records Management capability, and expertise is recognized within the market and by industry analysts (including Gartner and Forrester in their respective research on the records management vendor landscape). Open Text has been certified by global records management standards organizations, including the U.S. Department of Defense (DoD) and the Victorian Electronic Records Strategy (VERS). While not every customer demands records management solutions that meet organizational body standards, the research and development applied in obtaining certification with these standards result in highly sophisticated capabilities that support even the most stringent of compliance mandates.

- Open Text RM mitigates the risk related to litigation, regulatory, and internal audit by allowing proper policies to be applied to content in accordance with organizational file plans. Records Management provides a strongly defensible position to explain why a policy was applied to content, thereby reducing the costs and risks associated with content retention, disposition, and legal review. Open Text Records Management works seamlessly with Microsoft Office and SharePoint content, as well as both structured and unstructured content from other sources (SAP, Oracle, legacy systems, etc.) and even physical business records.

- Unique capabilities for email management and archiving are included. Organizations can ensure that business relevant and business record email is captured and saved in accordance with policy—minimizing risk of non-compliance. Automated but responsible and defensible disposition of low-value email enables organizations to impact discovery and litigation related costs that correlate directly to the volume of information retained. Offloading messages from the Exchange Server data store enables companies to curb the IT cost and complexity of the email environment, without impacting user productivity.

- Platform Independence minimizes storage costs. Because Open Text does not tie customers to a specific storage platform, organizations can effectively build independence between their ECM strategy (including email management) and their storage vendor/IT infrastructure. This maximizes return on investments in existing technology and eliminates the need to invest in disparate storage technologies to suit vendor specificity.
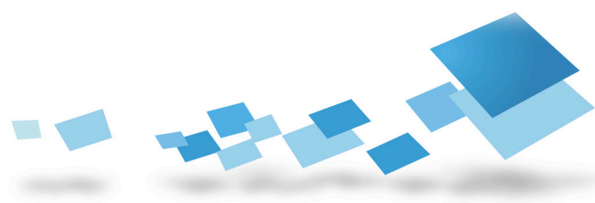
- Leading capabilities to support litigation cost control and risk mitigation mandates include rich support for content management across all platforms, content types, and applications. Organizations can extend their risk mitigation and legal cost control strategies with litigation readiness and eDiscovery solutions from Open Text.

## Open Text compliance solutions for the Microsoft Application Platform and Microsoft Office system

Leading organizations from around the world have deployed content management solutions from Open Text that enable them to leverage the flexible, intuitive, and seamlessly interoperable Microsoft Application Platform and Microsoft Office system while establishing a strong GRC framework to manage business records for regulatory compliance purposes, maintain content security (including rights management), and enforcing adherence with internal controls and information governance policies. Proven ECM solutions from Open Text for GRC programs built on the Microsoft Application Platform include:

- **Open Text Email Management**—for Microsoft Exchange Server and Lotus Notes with direct access and integration for Microsoft SharePoint Server deployments.

- **Open Text solutions for Microsoft SharePoint Server**—including Content Lifecycle Management for SharePoint to manage and leverage all types of content within SharePoint workspaces regardless of source (SAP, Oracle, legacy systems, file shares, email, etc.).

- **Open Text Records Management**—for managing and enforcing corporate policy and regulatory mandate surrounding the capture, storage, management, and disposition of business content.

- **Open Text Mobility solutions**—allowing all content to be accessed and leveraged from popular mobile devices.

- **Open Text eDiscovery**—Early Case Assessment and other applications of Open Text eDiscovery offerings significantly reduce the high cost of litigation.

## Customer success stories

### The Largest Worldwide Disability Insurance Company

The largest worldwide disability insurance company, based in the US, provides employee benefits including disability insurance, critical illness insurance, long-term care insurance, and life insurance. They needed
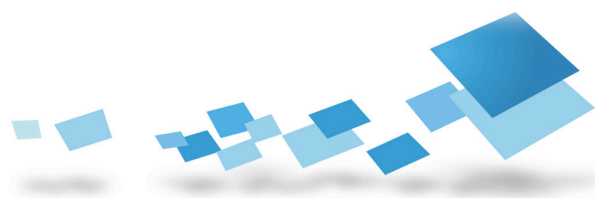
better visibility to their contracts and accessibility of particular e-mails for litigation cases. This organization required an integrated solution with both document archiving and records management across a variety of content sources and formats, including emails, SharePoint Server content and file system content.

**Products used include**: Open Text ECM Suite, Email Management for Exchange, and Open Text CLM Services for SharePoint.

## The National Institute of Allergy and Infectious Diseases

The National Institute of Allergy and Infectious Diseases (NIAID), a large Government organization in the US, utilizes Open Text Content Lifecycle Management together with their existing technology to enhance collaboration across their widespread workforce. NIAID was experiencing exponential growth of electronic document content. They were utilizing SharePoint Server for collaboration and document management and chose to augment this with Open Text Content Lifecycle Management to provide the sophisticated workflow, advanced document, and records management capabilities.

**Products used include**: Open Text Document Management, Open Text Records Management, Open Text Archive Server and Open Text CLM Services for SharePoint.
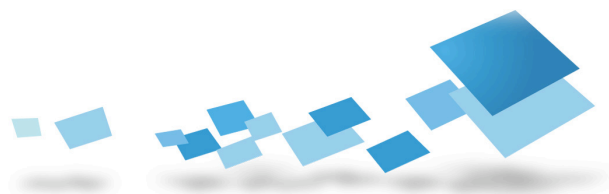
# Pillar Two: Aggregating Content within Business Context while Maximizing its Value and Minimizing its Management Cost

IT infrastructures in organizations have evolved to handle increasingly complex business processes, the proliferation of myriad systems and technologies to manage various challenges that arose over time, and the need to manage enormous amounts, and diverse types, of business content.

Progressive organizations across all industries are exploring ways to gain improved control over these highly complex and diverse infrastructures while consolidating content for better information access, timelier decision making, and greater consistency with respect to business content.

*Figure 4. Aggregating content is exponentially more valuable when shared.*

**Content….**

- Represents all human activity
- Exponentially more valuable when shared
- Security is paramount and adds complexity
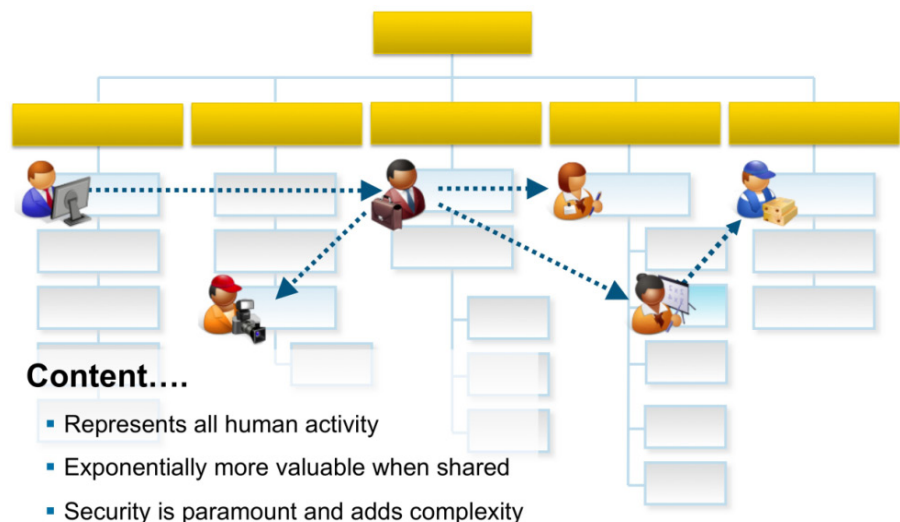
## The challenges

Enabling the integration and leverage of business content from disparate systems holds great promise for organizations that can execute on that strategy. The trouble is (as experience demonstrates) that establishing a truly aggregate ECM environment is rife with challenges.
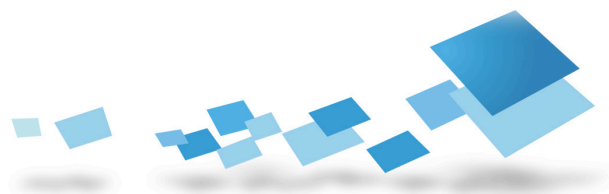
For organizations looking to take advantage of the opportunities presented by an integrated, interoperable ECM strategy, the challenges and pain points include:

- **Inability to integrate and leverage content from disparate systems and repositories**—this results in lost productivity, increased integration costs, lack of a holistic view of customer information, or content required by decision makers. Increasingly, organizations are channeling resources into the maintenance of heterogeneous environments, yet signal the need to bring together content from many systems into a single view—both within the corporate firewall and for external locations.

- **Content from disparate systems increases risk exposure**—content outside of a unified repository, that remains unstructured and/or unmanaged, represents potential for significant business and legal risk. Organizations are realizing the value of a holistic, harmonized approach to ECM. Without it, the work and resultant risk that comes with a discovery order, lawsuit, or compliance audit increases significantly.

- **Lack of user flexibility**—decision makers and knowledge workers throughout organizations would like to be able to access and work with content in their interface of choice at a given moment. For example, if they are working in a SharePoint workspace they would like secured access to all content within that familiar interface. They are frustrated by the need to access several systems and different conventions to work with different types of content. In short, they want a single point of contact for all the content they need to carry out their job.

- **Lack of mobile capabilities**—information workers need the ability to access, modify, collaborate, or leverage content using mobile devices. With the increase in demand for "anywhere, anytime access" to business content, the lack of mobile capabilities is an increasing pain point for many organizations.

- **"Siloed" content is difficult to bring together within business processes**—content is a critical part of the processes organizations need to automate in order to improve efficiency. There is a need to create processes that include content and metadata from different, and often disparate, systems and repositories.

- **Need to maintain cost control within IT Infrastructure**—IT organizations are increasingly faced with the need to contain costs of their IT infrastructure, including their storage costs. While storage needs grow as we store increased volumes of document and email content, emerging content types such as digital or video assets have

the potential to dramatically increase the storage needs and costs of the organization. IT needs the flexibility to store some content on less expensive devices, and to be able to move content from expensive storage media to less expensive or cloud-based storage.

## The goals

Organizations are continuously seeking out ways to better leverage business content for competitive advantage and to drive revenue generating opportunities—all while ensuring maximum flexibility and minimizing associated storage and ECM system costs. In striving to execute on this strategy, businesses aim to:

- Embrace a sophisticated approach to ECM, one that allows organizations to enrich content by combining it with metadata from different sources and leveraging the content to drive business process.

- Ensure maximal flexibility and cost savings within complex IT infrastructures.

- Facilitate the use of all content from all systems and repositories— regardless of vendor—across the corporate value chain (to encourage collaboration and content creation in ways that make it easy for users).

- Improve overall speed to access and usability of content, regardless of source.

## The Microsoft/Open Text advantage: aggregated enterprise content in context, minimized cost and maximized value

By working with Microsoft and Open Text, organizations can readily establish a true aggregate of business content; enabling information workers to easily work with content from various sources in their interface of choice.

Open Text stands unmatched in its ability to draw content from enterprise systems and enable users to leverage that content in the environment of preference—such as Microsoft Office applications, accessed through a SharePoint site.

With a combined Microsoft/Open Text approach, organizations can deliver on their "content aggregation" strategies much faster than traditional

approaches. Leveraging the Microsoft Application Platform, Open Text provides unique value along the following lines:

- Open Text provides unparalleled interoperability with other vendor content sources. This enables large enterprise customers to lower the cost of ownership by striking a balance between utilizing existing systems with the need to bring content together into one source.

- Compliance offerings from Open Text are recognized as leaders across the industry for having strength in integrating a large variety of content types, including emerging social networking and digital content types.
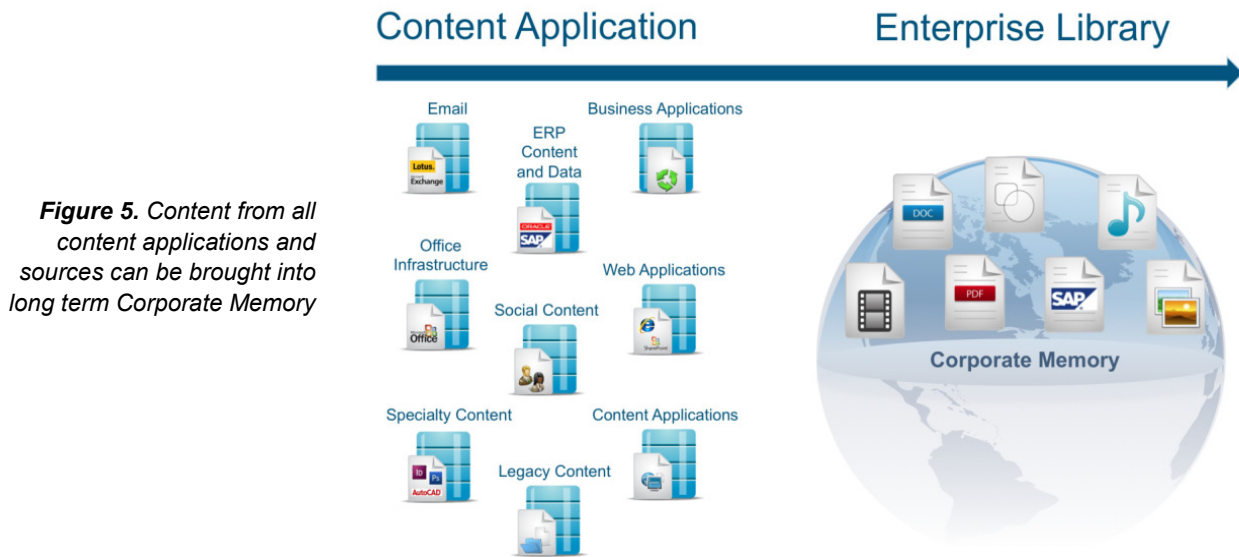
*Figure 5. Content from all content applications and sources can be brought into long term Corporate Memory*



- Open Text's product portfolio for Microsoft SharePoint Server specializes in bringing all content into the SharePoint environment so that users can work within their familiar Microsoft workspace while bringing SharePoint Server and Exchange Server content into other business contexts.

- Open Text and SAP share a unique relationship based on Open Text's demonstrated ability to leverage SAP content from a variety of interfaces, including Microsoft Outlook messaging and collaboration client, and SharePoint. For organizations with SAP deployments, there is considerable value in bringing together Open Text and Microsoft technologies to meet their corporate content management goals, including:

- Open Text extends its strength in Litigation Readiness and eDiscovery to all types of content including Microsoft content sources. This provides an eDiscovery solution that can impact the bottom line by minimizing costs through defensible collection, preservation, culling, and most importantly, processing of various content types to create review ready load files. This ability can be extended to all content sources across the enterprise IT infrastructure.

- Open Text facilitates the use of both workflow tools within point applications and business process automation for content that spans more than one application. In bringing together content from many sources, coupled with a process engine, Open Text is able to help businesses automate processes that involve content and metadata from a variety of applications.

- Open Text provides the ability to extend the user experience to additional environments, including mobile devices, SharePoint portals, Microsoft Outlook, and Microsoft Internet Explorer. This enables information workers to operate within the interface of their preference without sacrificing interactive capabilities or functionality.

## Open Text solutions for enabling an aggregated content strategy leveraging the Microsoft Application Platform

Open Text has a track record for providing cutting edge solutions that enable organizations to realize the benefits of contextual access to business content from a wide variety of systems and repositories. These solutions are built specifically for organizations looking to extend the value of their investments in Microsoft applications, servers, and technologies and include:

- **Open Text ECM Suite and Extended ECM for SAP**—to provide the ability to bring content together into one environment under a central set of compliance policies.

- **Open Text Email Management**—to bring content from either Exchange Server or Notes environments into the central, SharePoint workspace and manage under corporate compliance rules.

- **Open Text SharePoint products, including Content Lifecycle Management for SharePoint**—enable organizations to bring all types of content into SharePoint workspaces regardless of source, including from SAP, Oracle, legacy systems, file shares, email, etc.).

- **Open Text Mobility**—to provide users with the flexibility to access all of their content via mobile devices and perform business process operations.

- **Open Text Web Content Management**—to bring together content sources, including SharePoint, into one harmonized portal view and produce rich Web experiences for commercial sites.

- **Open Text eDiscovery Early Case Assessment powered by Recommind**—to enable enterprises to quickly and accurately explore data where it resides, before collection and preservation, providing a unique and powerful method to assess the merits of a proceeding far earlier than what was previously possible.

- **Open Text Content Server Search Connector for Microsoft FAST**—to provide the ability to bring Open Text content together within the organization's Microsoft FAST Search Server 2010 for SharePoint environment.

## Customer success stories
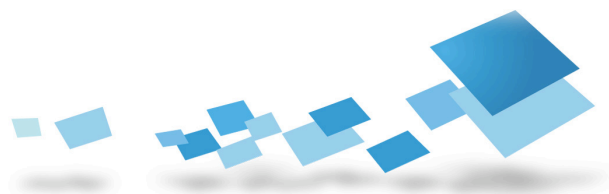
### Media and Entertainment Firm

A media and entertainment firm engaged with Open Text to bring corporate control to their Microsoft Exchange Server email environment—to curb costs associated with e-discovery and reduce the cost and complexity of the messaging environment.

The company followed a custodial model for corporate information management, meaning that employees are responsible for identifying and classifying business relevant content. Open Text Email Management was designed with such requirements in mind—providing users with common-sense mechanisms to identify important email and ensure they are captured accordingly, without changing the way users work in Outlook already.

**Products used include**: Open Text Email Management.

### Large Energy Company

A large energy company wanted to roll out SharePoint Server to facilitate better collaboration across departments—Open Text and Microsoft delivered. SharePoint Server was used to facilitate the creation and organization of content and the collaboration around a variety of content. The content that needs to be included as part of the corporate memory is

sent to an Open Text repository for long term storage, retention and disposition in accordance with corporate policy.

When this same energy company recognized the need to be better prepared for (and reduce the costs of) litigation, they turned to Open Text for eDiscovery software that would allow them to discover, hold, and prepare collections of content from the organization's file system, SharePoint sites, and the Open Text repositories.

**Products used include**: Open Text CLM Services for SharePoint, Open Text Early Case Assessment.

# Pillar Three: Easily Deploying Microsoft SharePoint Sites with Built-In Compliance and Enable Tailored Business Applications

As Microsoft SharePoint Server continues to gain widespread adoption and expansion within enterprises, the need to streamline deployments as well as empower users with tailored business applications that leverage the Microsoft Application Platform also grows. Together, Open Text and Microsoft are working to deliver on these requirements while enabling organizations to address the key content management challenges of today and in the future.

*Figure 6. Deploying solutions with built-in compliance.*
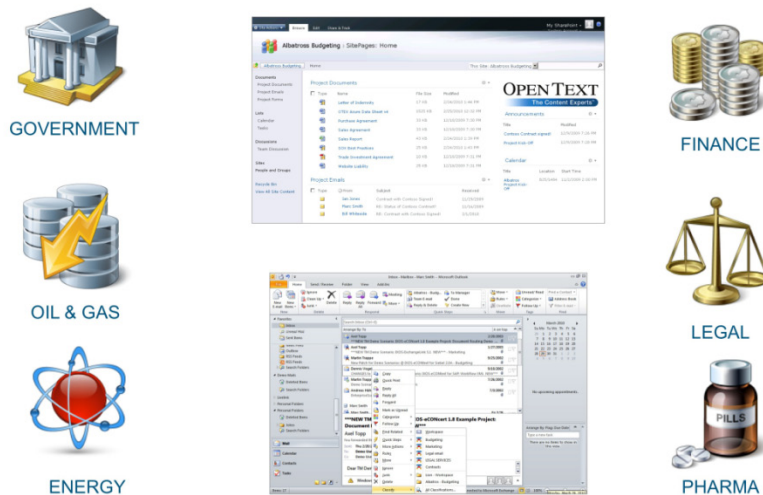


## The challenges

The value of Microsoft SharePoint Server as a collaborative environment for information workers is clear. Beyond providing users with unparalleled intuitiveness and flexibility, organizations strive to take full advantage of SharePoint, including deploying rich, tailored business applications to complement the core content management and collaborative capabilities it provides.
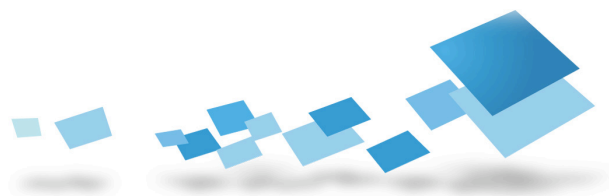
Organizations can face several obstacles and pain points when integrating their solutions because of a range of challenges, including:

- **Business applications residing outside of the overall ECM strategy**—organizations have invested in content-driven solutions that live outside of the ECM system, often times resulting out of necessity or due to the natural evolution of the IT ecosystem. Content within business applications needs to be managed within central compliance rules through integration with an enterprise content management system, such as Open Text ECM Suite.

- **Business applications can be disparate and difficult to learn**—third-party applications that introduce new user interfaces and lack interoperability with the rest of an organization's infrastructure can be difficult to learn, and difficult to use in conjunction with other applications. Users enjoy the seamlessness of the Microsoft graphical user interface and like to work within the SharePoint environment, so wherever possible applications should be available for use within that familiar and popular environment.

- **Applications, whether simple or complex, can be difficult to create and deploy**—business applications must meet both specific application goals as well as corporate governance policies. Organizations need tools to assist them in easily creating and deploying GRC-compliant SharePoint sites and applications without high-cost, customized solutions.

- **Lower budgets impact/delay critical application deployment**—without a platform for developing and deploying tailored, case-based solutions that many organizations require, many projects are being waylaid or given reduced budgets.

- **Do more with fewer resources**—application development requires rich domain and technical expertise. With an intuitive framework for building ECM applications, organizations prefer to rely on existing/dedicated resources.

## The goals

Organizations have embraced Microsoft SharePoint as the communication and collaboration technology of choice for enabling workers to easily collaborate around business content. Enterprises are now exploring ways to maximize the value gained from their SharePoint deployments, as well as streamline expansion and drive efficiencies through tailored content-centric applications. Progressive organizations aim to:
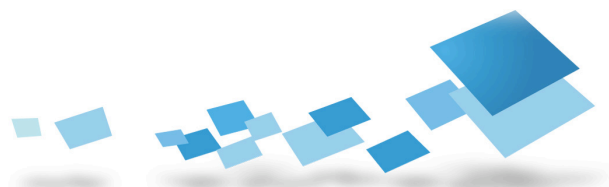
- Establish a highly collaborative, intuitive environment for information workers while ensuring scalability and streamlined deployment.

- Enable rich content applications to increase productivity, improve efficiencies, and drive opportunities.

- Address process automation and other goals within the highly intuitive SharePoint environment.

- Tackle content-related business challenges leveraging existing infrastructure to avoid investing in system retirement projects, new systems, or point solutions.

## The Microsoft/Open Text advantage: easily deploy Microsoft SharePoint sites and enable tailored business applications

Together, Microsoft and Open Text have helped organizations around the world get the most out of their SharePoint deployments. Open Text solutions, designed specifically for SharePoint as opposed to alternative approaches limited to "plug-in" or Web part capabilities, help organizations get the most out of their investments in SharePoint.

Open Text offers unique value to Microsoft SharePoint environments, including:

- With Open Text, customers can innovate anywhere. For example, drawing consequential content into SharePoint no matter where it originated—as an email, on a file share, or in an ERP system— enables users to collaborate and produce real business results more effectively and reliably.

- Open Text and Microsoft work closely together to ensure the highest degree of functionality for customers. Open Text has invested significant and dedicated resources as part of its corporate strategy to embrace SharePoint as an infrastructure and platform for business applications. Instead of focusing on Web part integration and removal of content from the SharePoint environment—an approach that other providers take—Open Text and Microsoft work closely together to ensure the highest degree of functionality for customers. The level of joint support both organizations provide is evidenced by the partner of the year awards Open Text has received from Microsoft, the Technology Partner of the Year award Microsoft has received from Open Text, and the many co-sponsored events and thought leadership initiatives the companies have undertaken.

- Open Text facilitates business process driven provisioning of SharePoint sites with configuration, applications, and corporate content policies built in. This provides central control for new and existing SharePoint sites, minimizes implementation costs and significantly reduces the need for custom code to create SharePoint applications. Moreover, with this approach, organizations can execute against organization-wide SharePoint governance strategies and enforce policies more effectively.

- SharePoint provides benefits by bridging content applications and content repositories while enhancing ease of use together with consistent and rich metadata. Open Text allows organizations to combine SharePoint metadata with metadata from other sources, allowing standardization and use of metadata to drive adherence with corporate policy.

- Open Text has strong expertise in several industries and application spaces, including energy, financial services, public sector, law firms and corporate legal departments, engineering, construction & operations, , , manufacturing, pharmaceutical & life sciences. This expertise allows us to bring the strengths of Open Text and Microsoft together within tailored industry solutions for SharePoint. Additionally, Open Text provides a rich development environment for its extensive partner network so they can build applications to meet the specific needs of industry customers.

## Open Text solutions for facilitating the easy deployment of Microsoft SharePoint environments with built-in compliance and enabling tailored business applications

As discussed above, Open Text and Microsoft have a highly collaborative relationship that has produced a comprehensive portfolio of solutions aimed at enabling organizations to take full advantage of business content via rich applications. Solutions that comprise Open Text's portfolio for Microsoft SharePoint include:

- **Open Text Case Management Framework for SharePoint**—designed for the ECM market for companies looking to extend SharePoint technology, Open Text Case Management Framework for Microsoft SharePoint is a set of tools that extend Microsoft SharePoint for the development of case management solutions.

- **Content Lifecycle Management Services for SharePoint**—and other Open Text SharePoint products bring all types of business content into the SharePoint environment—from leading ERP systems
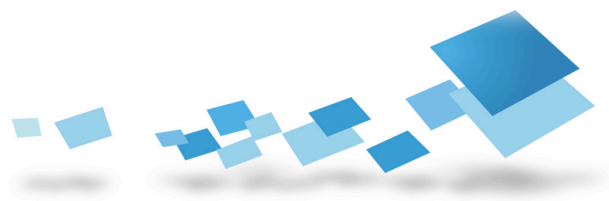
such as SAP and Oracle as well as legacy systems, databases, and file shares.

- **Open Text Legal Information Management for Microsoft SharePoint**—provides advanced content management specifically tailored to support the business processes of law firms and Corporate Legal departments and the matter-centric way that lawyers work.

- **Open Text Enterprise Connect**—provides users with access to all their business content and processes from multiple sources (Open Text Document Management, Open Text Content Lifecycle Management, Open Text eDOCS, or Microsoft SharePoint Server) directly from Microsoft Office (Word, Excel, PowerPoint), Microsoft Windows Explorer, Microsoft Outlook, Lotus Notes, and browser-based interfaces.

- **Open Text Enterprise Connect SharePoint Plug-in**—provides an intuitive interface for exposing SharePoint within the Outlook, Windows Explorer, and Office applications.

- **Open Text Recruiting Management for Microsoft SharePoint**— brings simplicity, efficiency, and automation to the entire corporate recruiting process. Utilizing the familiar and user-friendly Microsoft SharePoint, Office, and Outlook environments, complex hiring processes can be streamlined and intuitive, minimizing the time required for hiring managers, recruiters and reviewers involved.

- **Open Text Fax Server**—reduces costs, risks, and overhead associated with standalone fax machines and paper driven processes.

- **Open Text Storage Services for SharePoint**—helps organizations to manage the challenges and costs associated with operation and maintenance of a fast growing Microsoft SQL Server database environment such as those found with large SharePoint deployments.

- **Open Text File System Archiving**—provides a component of the transition from the environment where file system content is unmanaged to one where it is managed.
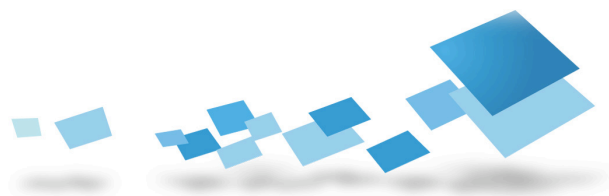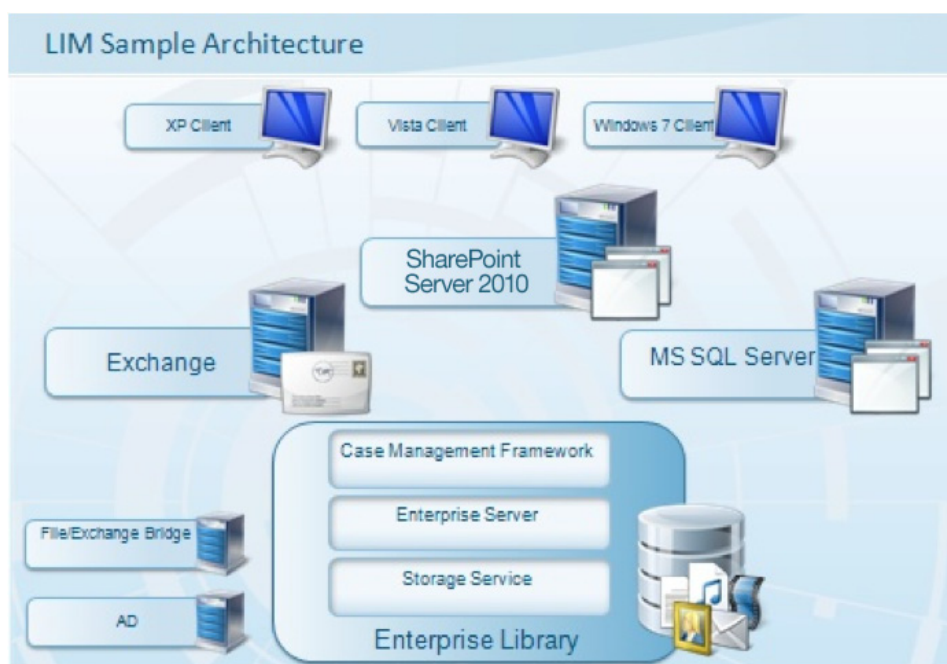
*Figure 7.* Legal Information Management

## Customer success stories

### Corporate Legal Department of a Large Financial Institution in Europe

In a large financial institution in Europe, the Corporate Legal Department wanted to deploy SharePoint but also needed to ensure that users could operate in a legal context (a "legal matter-centric" way of working). Additionally, the institution needed to ensure that all content was consistent with stringent corporate compliance regulations. Finally, customization was to be kept to a minimum so that their solution could scale without ongoing customization and modification costs. The customer chose Open Text Content Lifecycle Management for SharePoint, Open Text Case Management Framework for SharePoint and Legal Information Management for SharePoint to answer their needs.

**Products used include:** Open Text Content Lifecycle Management for SharePoint, Open Text Case Management Framework for SharePoint and Legal Information Management for SharePoint.
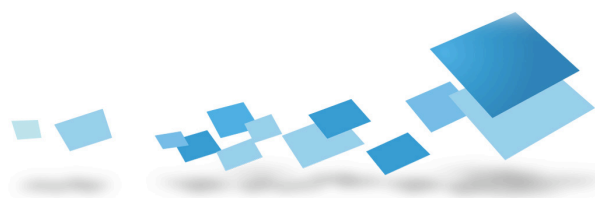
## Large Telecom Company

When a large telecom company decided to roll out SharePoint Server across its organization they came to Open Text for guidance. They wanted to facilitate departments having access to SharePoint sites, but also needed to have the ability to share the costs of the IT infrastructure and ensure that any requirement to archive SharePoint sites was accommodated so that unused or unnecessary sites could be removed from high cost, active IT environments. The company chose Open Text CLM Services for SharePoint and Open Text Case Management Framework for SharePoint to meet these needs.

**Products used include:** Open Text CLM Services for SharePoint and Open Text Case Management Framework for SharePoint.

## A Mid-Sized Law Firm

An EMEA mid-sized law firm wanted to implement SharePoint with specific requirements to map to the way their attorneys and other users work. They chose Legal Information Management (LIM) for SharePoint as it was built to meet the needs of the way their lawyers worked. Email management was a strong requirement so they utilized Open Text Enterprise Connect with the SharePoint plug-in (packaged with the LIM solution) to ensure their lawyers had a strong Outlook experience as well as the ability to operate within the SharePoint workspace environment.

**Products used include:** Legal Information Management for SharePoint and Open Text Enterprise Connect with the SharePoint plug-in.

## Microsoft and Open Text: Available Demonstration Scenarios

Ultimately, the strongest value that Open Text and Microsoft deliver for our joint customers involves how we come together to solve real business problems while helping our customers increase revenue, reduce costs, and improve compliance positions. In helping to demonstrate this value to organizations, a number of scenarios have been developed which address a variety of business challenges customers experience today. Within a series of Microsoft Technology Centers (Germany, UK and North America), an environment is available that can demonstrate a series of Open Text and Microsoft products working together to solve business problems.

Open Text is a Solution partner in the 20+ MTCs worldwide. Open Text and Microsoft can deliver regulatory compliance related strategy briefings. The strategy briefing is designed to provide your company with a clear and actionable set of next steps on how an Open Text and Microsoft solution can assist you in achieving your key business objectives. Through a discovery process and scenario-based demonstrations, they will help your key business and technology stakeholders envision technology-based solutions that will enable your organization to reach its full potential. Overviews of Open Text and Microsoft demonstration scenarios are described below.
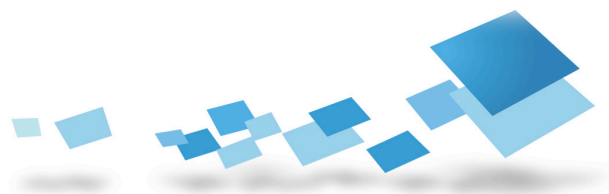
# Information lifecycle management

Using Open Text's Content Server as the common archive for all kinds of enterprise content from various silos, this scenario focuses on Total Cost of Ownership. It demonstrates how email, SharePoint, file system and other content can be archived and managed centrally.

Through single-instancing and compression this creates a strong ROI for the customer. SharePoint serves as the central interface to all that content.

*Figure 8. ILM Archiving Scenario*



**Economic Efficiency**

**OPEN TEXT**
The Content Experts™

- Even when considering the initial investments a high ROI can be achieved in Year 1

- Open Text Enterprise Library
  - delivers single instancing, compression and encryption for all archived content
  - by unburdening leading systems, the efficiency of operation is increased
  - lowers the total cost of storage
  - is the foundation that serves multiple applications (ERP data and documents, Email, SharePoint, File Systems and any other CMS

Cumulative TCO Savings Benefits
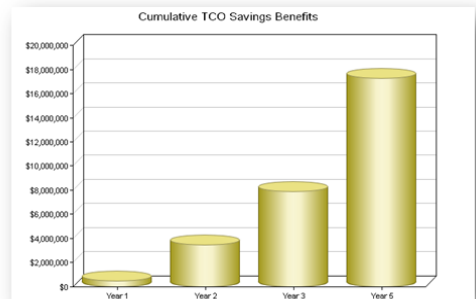
Get your personalized ROI calculations here

| Storage Volume per User (in GB) | 6 |
|---|---|
| User | 10.000 |
| Increase per Year | 50% |
| Cost degeneration / year | 20% |
| SIA/Compression (down to) | 40% |
| Use of existing data (active) | 20% |
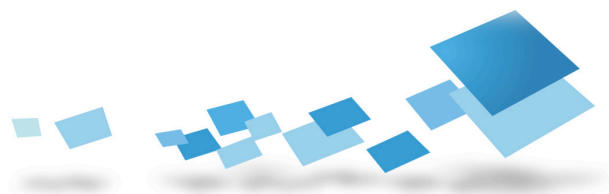
## eDiscovery and litigation readiness

Discovering potentially relevant content from various information silos to support a legal case, such as a patent litigation, is both costly and challenging. This scenario not only shows how content such as emails or any other content in the Enterprise Library can be found using SharePoint as the primary access point, but it also shows how legal holds can be applied to these records. Via Open Text functionality, all of the identified information regarding the specific case can not only be discovered easily, but it can be made available through a separate SharePoint site to internal or external custodians and authorities.

The discovery portion of this scenario will include Open Text's new FAST ESP connector for the Enterprise Library, extending the value Open Text delivers to the Microsoft infrastructure.

*Figure 9. e-Discovery Scenario*



Solution Summary

OPEN TEXT
The Content Experts™

- Remote collection from disparate enterprise data sources

- SharePoint with Open Text extensions serves as user experience for search and collection

- FAST ESP as search engine into multiple content stores
  - Enterprise Library
  - SharePoint
  - Exchange
  - File Systems

- Enterprise Library as source for documents of record

eDiscovery Using Fast and SharePoint
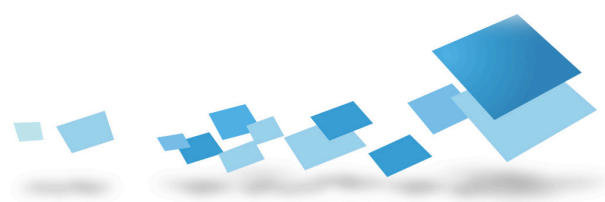
## Electronic document and records management system

Records Management is clearly one topic that makes Open Text unique. Not only are we a provider of Records Management capability in SharePoint that received the DOD 5012.2 version 3 certification, but we can actually provide a central file plan and RM capability to various silos including Email or SAP content.

This scenario demonstrates how a central file plan can be set up, used, and managed for Email or SharePoint content. Automatic disposition and detailed auditing capabilities are other benefits that result in strong ROI cases for the customer.

*Figure 10. Electronic Document and Records Management*

### Economic Efficiency Analysis

OPEN TEXT
The Content Experts™

- IT and Storage
  - Keeping content longer than necessary is needless and causes sunk costs (resources, availability, performance)
- Legal regulations (Compliance)
  - Sarbanes-Oxley, HIPAA, FACTA, Gramm-Leach-Bliley (GLB), etc. demand the deletion of content
- Efficiency
  - Knowing which records exist and localize these easily to support audits such as through FDA
  - Corporate transparency

## Case management solutions for SharePoint

Open Text Solutions for SharePoint such as Legal Information Management or Recruiting Management approach the customer from a different angle. Here we demonstrate all the benefits of Open Text in a single business solution for a specific user group within the customer. He or she can solve the Legal Matter management of the legal department through an interface that the company's attorneys like and understand—Office and Outlook. While doing this the evaluator can apply corporate policy and long-term retention through the use of Open Text technology. All of this comes together to show that Open Text SharePoint solutions are definitely enterprise-ready.

| Case Profile | |
| --- | --- |
| Your Case | Description |
| Deal | Deals represent the effort needed to sell goods and services, including hardware leases, mortgages, loans, and insurance. Delays are prevented by keeping deal information organized together, presenting status at a glance, and enabling rapid contract creation with approved text components. Sub-cases include contracts and proposals. |
| Legal Matter | Lawyers need easy access to information regarding legal matters they handle, ranging in complexity from drafting a simple contract or will to coordinating complex litigation or mergers and acquisitions of large public corporations. |

## Case Profile

| Your Case | Description |
|---|---|
| **Well** | Wells (including oil wells) need their documents managed and presented based on users' needs (drillers, production, finance, legal). This solution can also manage early stages (research, leasing), getting the resource to production as fast and efficiently as possible. |
| **Investigation (complex)** | Investigations, often criminal in nature like with suspected terrorists or fraud, need their electronic and paper-based information centralized in one area. These cases are more complex than Audit or Examination below, with multiple organizations storing parts of the case, data inter-relationships, etc. |
| **Audit of Examination (less complex)** | Can be an internal or external audit, or a bank or insurance examination by a government agency. This type of investigation has fewer requirements and is usually less complex than Investigation above. |
| **Inquiry** | Managing inquiries, such as customer support requests, often includes managing correspondence. For example, government agencies are often required to track and respond to correspondence-based inquiries from constituents and legislators. |

| Case Profile | |
| --- | --- |
| **Your Case** | **Description** |
| **Change to procedure** | Changes to manufacturing procedures are often closely regulated to assure validity and verify documentation updates. For example, OSHA Process Safety Management helps prevent chemical accidents. This also includes quality control tracking and research to improve product quality. |
| **Application** | Applications are received and processed. For government, this might be a local agency that processes permit applications to control air quality emissions, construction, waste management, etc.<br><br>For the private sector, this might be applications for property and casualty insurance underwriting. |
| **Claim** | In the private sector, examples include health care benefit claims, warranty claims, customer support complaints, insurance claims, etc. In government, examples include workers' comp claims, EEOC charges, labor relations disputes, VA claims, social security, Medicare, etc. |
| **Human or Social Services Case** | Government agencies need to automate the provision of constituent services according to program guidelines. Examples include child welfare, medical care, disability programs, addiction services, etc. |
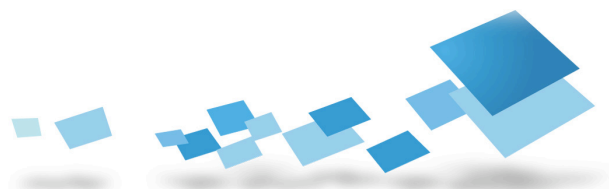
## Making SharePoint the leading system—migration Scenarios

Many benefits of the Open Text Enterprise Library have been shown in previous scenarios. In this scenario, we dive into the world of interoperability benefits for the customer. SharePoint is usually made available to a broader user group within a company than, for example, SAP—one reason being the pure licensing cost.

If the SAP content, created and managed through Open Text Extended ECM for SAP, can now be accessed and made available through SharePoint, new ROI and processes can be achieved by our customers. We even go one step beyond and show how SharePoint content can become an SAP business object through Open Text.



*Figure 11*. SharePoint as the leading system.
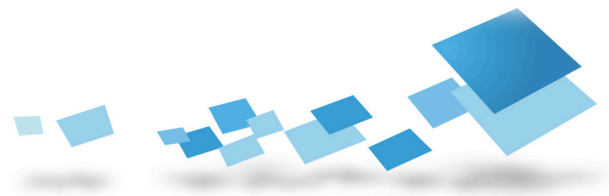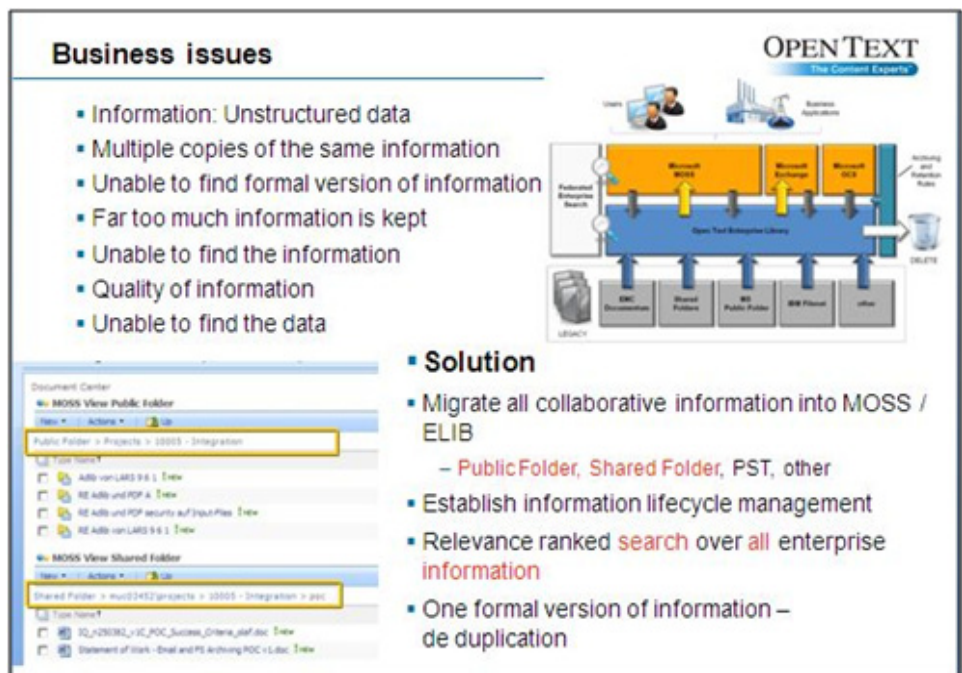
## Summary

As Open Text, we are The Context Experts. Organizations not only look to us for content management technologies—especially those which are becoming increasingly commoditized—but also for guidance and best practices on how our solutions work in practice and on a truly enterprise and massive scale. On its way to earning its reputation for excellence and leadership in Enterprise Content Management, Open Text realized early on that establishing a solid, collaborative relationship with Microsoft was essential to enabling organizations to execute on a holistic ECM strategy.

Organizations leverage Open Text's wealth of experience in all aspects of Enterprise Content Management to bring together diverse technologies into a cohesive ECM solution that is right for the organization. In collaborating with our customers and listening to their requirements, Open Text understands that they place great value on our use of Microsoft technologies to solve portions of their business problems, and to augment those technologies with components and solutions that solve critical business problems. This results in providing the unparalleled framework for corporate compliance and long term corporate memory that organizations need.

After more than 10 years of partnering with Microsoft to deliver the most sophisticated content management components and applications available, Open Text remains committed to helping organizations get the most out of their investments in Microsoft by enabling rich content applications that reduce costs, mitigate business and legal risk, and facilitate productivity and efficiency improvements.
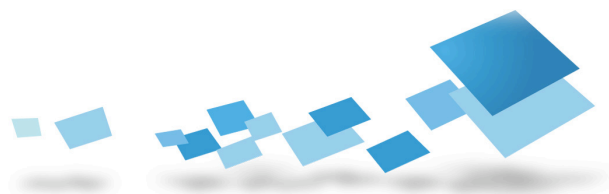
## Resources

### Open Text and Microsoft Better Together Central web site

For more information about Open Text and Microsoft value proposition, please visit our Better Together Web site, which offers a wide range of resources outlining the value of the Microsoft/Open Text alliance, including a resource center, a SharePoint readiness assessment tool, an ROI calculator, and the Better Together movie series. Please visit the site at:

www.bettertogethercentral.com

### Open Text ECM Suite for Microsoft web site

For more information about Open Text's offerings built exclusively for the Microsoft Application Platform, please visit our Open Text ECM Suite for Microsoft Web site, which offers product brochures, industry solution datasheets, whitepapers, news, events, and other information regarding Open Text products and solutions for Microsoft. Please visit the site at: www.opentext.com/2/global/sol-products/sol-pro-extensions-microsoft.htm

### Microsoft and Open Text Working Together on Transparent Information Governance brochure

For more information about using the collaboration between Open Text and Microsoft in creating solutions that help organizations address the critical content management issues surrounding information governance, please see our Microsoft and Open Text Working Together on Transparent Information Governance brochure, at: www.opentext.com/2/global/sso_download_protected?docpath=product/microsoft/msft-ot-transparent-info-governance.pdf
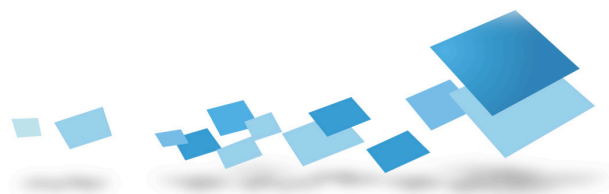
## About Open Text

Open Text is a leader in Enterprise Content Management (ECM). With two decades of experience helping organizations overcome the challenges associated with managing and gaining the true value of their business content, Open Text stands unmatched in the market.

Together with our customers and partners, we are truly The Content Experts,™ supporting 46,000 organizations and millions of users in 114 countries around the globe. We know how organizations work. We have a keen understanding of how content flows throughout an enterprise, and of the business challenges that organizations face today.

It is this knowledge that gives us our unique ability to develop the richest array of tailored content management applications and solutions in the industry. Our unique and collaborative approach helps us provide guidance so that our customers can effectively address business challenges and leverage content to drive growth, mitigate risk, increase brand equity, automate processes, manage compliance, and generate competitive advantage. Organizations can trust the management of their vital business content to Open Text, The Content Experts.

## About Microsoft

Founded in 1975, Microsoft (Nasdaq "MSFT") is the worldwide leader in software, services and solutions that help people and businesses realize their full potential.

www.**opentext**.com