



CONTENT WORLD 2009  
FAX AND DOCUMENT DISTRIBUTION GROUP

CONFERENCE AGENDA

**OPEN TEXT**  
The Content Experts™



Content World, Open Text's premier flagship event, is a conference like no other – a place where you will discover new ways to capitalize on your investment in Open Text Fax and Document Distribution solutions. This year's program is divided into two sessions. The first being for Open Text partners on Monday and Tuesday, October 26<sup>th</sup> and 27<sup>th</sup>, 2009 and the second for Open Text customers and partners on Wednesday and Thursday, October 28<sup>th</sup> and October 29<sup>th</sup>.

Throughout the conference, attendees will participate in interactive, thought-provoking sessions, led by Fax and Document Distribution subject matter experts, on such topics as market trends, product strategy and technology updates.

Included in this agenda is the schedule of sessions and events planned for our Fax and Document Distribution Group Partners. For a full description on each topic, please visit the conference website: <http://www.opentext.com/contentworld/2009>.

**Note:** Session titles on the website may vary slightly from this agenda.

SUNDAY October 25, 2009

Time	Topic	Location
T B D	Conference Registration	



MONDAY October 26, 2009

Time	Topic	Presenter	Location
7:30 am – 5:30 pm	Conference Registration		
7:30 am - 8:00 am	Breakfast		
9:00 am - 5:00 pm	NEW Training Course: Fax Server Architecture – Fax Flow Troubleshooting <i>Partners and Customers</i>	<i>Joshua Butcher, Senior Technical Instructor</i>	
8:00 am - 12:00 pm	General Partner Session	<ul style="list-style-type: none"> <li>• Executive Welcome</li> <li>• Foundation setting of looking to build 1V1V Program</li> <li>• Key note speaker</li> <li>• Success Stories</li> <li>• Analyst</li> <li>• Introduction of Partner Support Program</li> <li>• Introduction of Partner Place in Solution Central</li> </ul>	
12:00 pm - 1:00 pm	Lunch		
1:00 pm - 2:30 pm	Direction and Strategy	<i>Matthew Brine, Vice President, Fax and Document Distribution Group</i>	
2:30 pm - 2:45 pm	Break		
2:45 pm - 3:45 pm	Product Strategy and Technology Update	<i>Matt Adney, Vice President, Product Management</i>	
3:45 pm - 4:00 pm	Break		
4:00 pm - 4:30 pm	Support Update	<i>James McGourlay, VP Customer Support Chris Clinton, Director, Customer Support David Slimmon, Director, Partner Support Services</i>	
4:30 pm - 4:50 pm	Marketing Update	<i>Doreen Eatough, Marketing Director</i>	
4:50 pm - 5:00 pm	Close	<i>Matthew Brine, Vice President, Fax and Document Distribution Group</i>	
6:00 pm - 9:00 pm	Partner Appreciation Night		



**TUESDAY October 27, 2009 – Technical and Business Track Sessions**

Time	Topic & Presenter	Location	Topic & Presenter	Location
7:30 am – 5:30 pm	Conference Registration			
8:00 am – 9:00 am	Breakfast			
	Technical Track Sessions		Business Track Sessions	
9:00 am – 10:30 am	Open Text Fax Technology Update - Deep Dive and Chalk Talk <i>Treber Rebert, Senior Director, Software Development</i> <i>Matt Adney, Vice President, Product Management</i>		Partner Demand Generation <i>Doreen Eatough, Marketing Director</i> <i>Kim LaPlante, Director Partner Management</i>	
10:30 am -11:00 am	Break			
11:00 am – 12:30 pm	Document Server, Alchemy Edition and Workflow Server - .NET Edition, Technology Update, Deep Dive and Chalk Talk <i>Lyle Bush, Director, Software Development</i> <i>Matt Adney, Vice President, Product Management</i>		Introduction to Open Text Sales Process <i>Matthew Brine, Vice President, Fax and Document Distribution Group</i>	
12:30 pm – 1:30 pm	Lunch			
1:30 pm – 3:00 pm	Fax over IP Technical Workshop <i>David Hanes &amp; Gonzalo Salguero, Cisco, authors of "Fax, Modem, and Text for IP Telephony"</i> <i>Ken Romo, Solutions Consultant</i> <i>Marco Brugge, Solutions Consultant</i> <i>Partners and Customers</i>		Putting the Open Text Sales Process into Practice <i>Russell Davis, Director, Channel Sales</i> <i>John Harrison, Director of International Sales</i>	
3:00 pm – 3:30 pm	Break			
3:30 pm – 5:00 pm	Fax over IP Technical Workshop (continued) <i>Partners and Customers</i>		Open Text Document Server, Alchemy Edition (includes case studies) <i>Darren Boynton, Product Marketing Manager</i> <i>Karora Technologies</i>	
5:00 pm – 7:00 pm	Global Star Awards and Reception <i>Customers</i> <i>(Partners may attend if registered and paid for Content World)</i>			
7:30 pm–10:00 pm	Gala Dinner and Kickoff <i>Customers</i> <i>(Partners may attend if registered and paid for Content World)</i>			



WEDNESDAY October 28, 2009 - **Partners and Customers**

Time	Topic	Presenter	Location
7:30 am – 5:30 pm	Conference Registration		
7:30 am - 9:00 am	Breakfast		
9:00 am - 9:50 am	Introduction to Open Text Fax Solutions (Agility Track)	<i>Geoff Anderson, Senior Product Manager Matt Adney, Vice President, Product Management</i>	
9:50 am - 10:05 am	Break		
10:05 am - 10:55 am	Customer Case Studies, Healthcare – Reducing Costs and Improving Performance Using Open Text Fax Solutions (Agility Track)	<i>Mike James, Informa Software Partner (TBD) Russell Davis</i>	
10:55 am - 11:10 am	Break		
11:10 am - 12:00 pm	Faxing over IP – What is it All About? (Agility Track)	<i>Geoff Anderson, Senior Product Manager Quentin Kramer, Carousel Industries</i>	
12:00 pm - 1:30 pm	Lunch and Pavilion		
1:30 pm - 3:00 pm	General Session		
3:20 pm - 4:10 pm	Customer Case Studies, Financial Services – Reducing Costs and Improving Performance Using Open Text Fax Solutions (Agility Track)	<i>Brian Larson, Instant InfoSystems Partner (TBD) John Harrison</i>	

4:30 pm - 5:20 pm

Adding Fax Capabilities to Your ECM Suite (Agility Track)

*Jonathan Sze, Director of Solutions  
Dan Lopez, Solutions Consultant*



THURSDAY October 29, 2009 - **Partners and Customers**

Time	Topic	Presenter	Location
7:30 am – 5:30 pm	Conference Registration		
7:30 am - 9:00 am	Breakfast		
9:00 am - 9:50 am	Open Text Fax Server (RightFax) – Overview and Roadmap	<i>Matt Adney, Vice President, Product Management Treber Rebert, Senior Director, Software Development</i>	
9:50 am - 10:05 am	Break		
10:05 am - 10:55 am	Open Text Fax Server Technical Deep Dive	<i>Treber Rebert, Senior Director, Software Development Matt Adney, Vice President, Product Management</i>	
10:55 am - 11:10 am	Break		
11:10 am - 12:00 pm	Open Text Fax Server Technical Deep Dive (cont)	<i>Treber Rebert, Senior Director, Software Development Matt Adney, Vice President, Product Management</i>	
12:00 pm - 1:30 pm	Lunch and Pavilion		
1:30 pm - 2:20 pm	Open Text Fax & Document Distribution Solutions Group (Captaris) User Meeting	<i>Matthew Brine, Vice President, Fax and Document Distribution Group</i>	
6:00 pm - 10:00 pm	Evening Event (offsite)		

# SESSION DESCRIPTIONS

MONDAY October 26, 2009

Topic & Presenter	Description
<p>NEW Training Course: Fax Server Architecture – Fax Flow Troubleshooting</p> <p>Partners and Customers</p> <p><b>Joshua Butcher</b></p>	<p>(1-day Support Specialist Certification Course)  <a href="http://www.opentext.com/contentworld/2009/workshops/course-detail.html?workshopid=1548">http://www.opentext.com/contentworld/2009/workshops/course-detail.html?workshopid=1548</a></p> <p><b>This is the Advanced level course on Fax Server that you've been asking for!</b> This new course is designed to follow the process of inbound and outbound faxes in detail. It will help you understand how Fax Server architecture works and establish a foundation for a linear approach to troubleshooting issues by evaluating the various stages in a fax's life cycle. This is an advanced technical training course and assumes a sound understanding of the features and capabilities of the product, some of which will be reviewed.</p> <p><b>Upon completion of this course, you will be able to:</b>            Distinguish and categorize Fax Server services that are used for processing faxes            Reconstruct the sequence of events of an inbound and outbound fax using Fax over IP (FoIP)</p> <p><b><i>It is recommended that attendees to this course have completed Fax Server Implementer training and FoIP Fundamentals training</i></b></p>
<p>Direction and Strategy</p> <p><b>Matthew Brine</b></p>	<p>This session will provide an update on the Fax and Document Distribution Group's vision, strategy and high-level action plans. The presentation will discuss the customer and market drivers that impact our strategy and the important role our partners play in our success.</p>
<p>Product Strategy and Technology Update</p> <p><b>Matt Adney</b></p>	<p>Matt Adney will present the short- and mid-term product roadmaps and the longer-term projects that are "in the labs" for future consideration. Matt will also discuss the underlying architectural and technology directions for the Open Text Fax and Document Distribution Group's products.</p>
<p>Support Update</p> <p><b>James McGourlay Chris Clinton David Slimmon</b></p>	<p>This session will provide an update on the progress of the migration to Open Text support. The presentation will highlight the tools, infrastructure, and support offerings available to our partners.</p>
<p>Marketing Update</p> <p><b>Doreen Eatough</b></p>	<p>This session will provide an overview of the Fax and Document Distribution Group's marketing strategy and plans and overview tools to assist our partners to improve win rates and close more business in a shorter period of time.</p>
<p>Close</p> <p><b>Matthew Brine</b></p>	

Topic & Presenter	Description
<b>Technical Track Sessions</b>	
<p>Open Text Fax Technology Update – Deep Dive and Chalk Talk</p> <p style="text-align: center;"><b>Treber Rebert</b> <b>Matt Adney</b></p>	<p>Intended for partners who require a deeper understanding of Fax Server implementations and configurations, this session will feature a member of the development team who will provide technical detail, deliver demonstrations, review product changes and highlight new features/technologies included in recent and coming product releases. Attendees will gain a deeper understanding of Fax Server, the future roadmap for this product line and how Fax Server continues to grow in importance for the Fax and Document Distribution Group vision and strategy.</p> <p>Preview and discuss with the Open Text Fax development and product management team where the fax technology is evolving over the next 12 months and why.</p>
<p>Document Server, Alchemy Edition and Workflow Server - .NET Edition, Technology Update, Deep Dive and Chalk Talk</p> <p style="text-align: center;"><b>Lyle Bush</b> <b>Matt Adney</b></p>	<p>Aimed at those who need a deeper technical understanding of Document Server and Workflow Server (e.g. sales engineers), in this session you will discover the inner workings of a Document Server implementation including best practices associated with installations and configurations. You will also be immersed into the technical details around Workflow Server. Understand and see the best practices, tips, and tricks of Workflow Server from a member of the development team. This informative presentation is brought to life by multiple deep technology demonstrations. You will also participate in a discussion on what is on the near- and long-term horizon for Document Server and Workflow Server solutions. Attendees will gain both a deeper understanding of Document Server and Workflow Server as well as knowledge of where Open Text is headed and how to communicate this vision with prospects and customers.</p> <p>This session will provide a technology update and a forum for in-depth architecture discussion with the Document Server and Workflow Server development and product management team.</p>
<p>Fax over IP Technical Workshop</p> <p style="text-align: center;"><b>David Hanes</b> <b>Gonzalo Salguero</b> <b>Ken Romo</b> <b>Marco Brugge</b></p> <p style="text-align: center; color: green;">Partners and Customers</p>	<p>In this session we will review the impact of FoIP on IT infrastructure consolidation projects and how you can leverage FoIP to create an organization distributed capture platform. This session will cover both the commercial and technical aspects of the application of the technology and is appropriate for sales, pre-sales and technology architecture consultants as well as business executives who wish to understand more about new opportunities created by FoIP.</p> <p>The world's foremost Cisco FoIP experts will discuss how FoIP technology has evolved and where it is going, best practices to implement in a Cisco environment, Cisco technical tips and FoIP architecture.</p> <p>All attendees will receive a copy of "Fax, Modem, and Text for IP Telephony", written by the presenters and published by Cisco Press. This book is the definitive resource for understanding, designing, configuring, and troubleshooting fax, model and text to today's IP networks.</p>
<b>Business Track Sessions</b>	
<p>Partner Demand Generation</p> <p style="text-align: center;"><b>Doreen Eatough</b> <b>Kim LaPlante</b> <b>Brian Hansford</b></p>	<p>Join this session where you will learn about various lead generation activities being conducted on behalf of our partners, and how you can leverage them to increase your business. You will hear about: planned Open Text themes and campaigns, email and lead nurturing campaigns, trade shows and seminars, direct mail, telemarketing, web site development, and how Open Text performs data cleaning, lead qualification and the lead distribution process.</p> <p>Review Open Text marketing activities, including lead generation initiatives, and learn 5 simple steps to increase your market presence and lead generation activities.</p>
<p>Introduction to Open Text Sales Process</p> <p style="text-align: center;"><b>Matthew Brine</b></p>	<p>This session will provide a thorough examination of the Open Text Sales process, including the customer buying process, value based selling steps associated with the buying process, the Fax and Document Distribution selling process and detailed critical activities associated with each step of the process.</p> <p>Selling is not easy. The Open Text Sales Process for Fax and Document Distribution provides clear and simple guidelines to maximize your sales success in your organization. At this session you will learn the 7 step sales process</p>

	that we use in open Text and understand the key activities that are part of this process.
<p>Putting the Open Text Sales Process into Practice</p> <p><b>Russell Davis</b> <b>John Harrison</b></p>	<p>As a follow-on to the Open Text Sales Process, this session provides an in-depth look at the sales and marketing tools available to partners and how they map back to the critical activities along each step of the sales process. At the end of this session, you will have a solid understanding of exactly which tools are available to utilize, and where you should be using them throughout the customer buying lifecycle.</p> <p>Five ways to leverage the Open Text Sales Process across your organization, including how and what we focus for success.</p>
<p>Open Text Document Server, Alchemy Edition (includes case studies)</p> <p><b>Darren Boynton</b> <b>Karora Technologies</b></p>	<p>Intended for those new to Document Server, this session will uncover the major themes of Document Server against the overall Enterprise Content Management (ECM) backdrop. Attendees will come away with a working understanding of document and records management concepts, the overall business drivers around adopting these solutions and how Document Server is positioned for success in this market.</p> <p>Open Text Document Server is a cost effective and simple-to-use document imaging and archive solution. Three partners will present customer deployments, what worked well and what could have been done better. (One case study must be a high volume fax archive study. This may need to be from one of our PS team.)</p>

Topic & Presenter	Description
<p>Introduction to Open Text Fax Solutions (Agility Track)</p> <p><b>Geoff Anderson</b> <b>Matt Adney</b></p>	<p>Looking at simple ways to reduce costs, improve efficiency and increase effectiveness? Do you have a need to ensure that all of your inbound and outgoing documents are recorded and timely? Do you have manual fax machines or is your organization reliant on faxing? This session will provide an overview on why faxing is mission critical for many organizations and how companies can leverage a fax server to assist in their compliance needs. This session will also highlight the fax options provided by Open Text and why choosing an Open Text Fax and Document Distribution solution is a good investment with a quick ROI.</p> <p>All attendees will receive a copy of "The Essential Guide to Fax Server Software" (see Brian Hansford).</p>
<p>Customer Case Studies, Healthcare – Reducing Costs and Improving Performance Using Open Text Fax Solutions (Agility Track)</p> <p><b>Mike James, Informa Software</b> <b>Partner, TBD</b> <b>Russell Davis</b></p>	<p>Open Text partners will discuss how and why customers have implemented Open Text Fax Server to meet their organizational challenges. You will learn about the customers' problems they were trying to solve (their pain), how Fax Server has been implemented, and the benefits they are receiving from their successful deployment.</p>
<p>Fax over IP – What is it All About? (Agility Track)</p> <p><b>Geoff Anderson, Senior Product Manager</b> <b>Quentin Kramer, Carousel Industries</b></p>	<p>The convergence of voice and data communications networks via the Internet Protocol (IP) is occurring at an ever-increasing pace. Most organizations implementing VoIP also need to provide their users with reliable faxing capabilities. Companies with a traditional TDM (time-division multiplexing) infrastructure may wish to deploy a fax over IP (FoIP) infrastructure today to take advantage of the benefits of an IP-based fax server. This session will review the impact of FoIP on IT infrastructure consolidation projects and discuss the benefits of faxing over IP with Open Text Fax Server (RightFax).</p>
<p>Customer Case Studies, Financial Services – Reducing Costs and Improving Performance Using Open Text Fax Solutions (Agility Track)</p> <p><b>Brian Larson, Instant InfoSystems</b> <b>Partner, TBD</b> <b>John Harrison</b></p>	<p>Open Text partners will discuss how and why customers have implemented Open Text Fax Server to meet their organizational challenges. You will learn about the customers' problems they were trying to solve (their pain), how Fax Server has been implemented, and the benefits they are receiving from their successful deployment.</p>
<p>Adding Fax Capabilities to Your ECM Suite (Agility Track)</p> <p><b>Jonathan Sze</b> <b>Dan Lopez</b></p>	<p>Find out how you can enhance the value of your investment in Open Text ECM Suite with the global market leader in enterprise fax – Open Text Fax Server, RightFax Edition. This session describes how Open Text Fax Server can be integrated to your Open Text Document Management system. Learn how to effectively extend your Open Text solution to reduce costs due to processing paper faxes and managing paper-driven processes across your organization.</p>

Topic & Presenter	Description
<p>Open Text Fax Server (RightFax) – Overview and Roadmap</p> <p><b>Matt Adney</b> <b>Treber Rebert</b></p>	<p>This session presents the short- and mid-term product roadmaps and the longer-term projects that are “in the lab” for future consideration. The underlying architectural and technology directions for the Open Text Fax and Document Distribution Group’s (formerly Captaris) products will also be discussed. Attend this session to gain a deeper understanding of Fax Server, the future roadmap for this product line, and how Fax Server continues to grow in importance for the Fax and Document Distribution Group’s vision and strategy.</p>
<p>Open Text Fax Server Technical Deep Dive</p> <p><b>Treber Rebert</b> <b>Matt Adney</b></p>	<p>Intended for those who require a deeper understanding of Open Text Fax Server implementations and configurations, this session will feature a member of the development team who will provide technical detail, deliver demonstrations, review product changes and highlight new features/technologies included in recent and coming product releases.</p>
<p>Open Text Fax &amp; Document Distribution Solutions Group (Captaris) User Meeting</p> <p><b>Matthew Brine</b></p>	<p>Would you like to be part of our user group for Open Text Fax and Document Distribution (former Captaris) solutions? Do you have ideas about the structure and mission of the user group? Come to this meeting to help us set up our Fax and Document Distribution user group and be one of its founding members.</p>