



**OPENTEXT**  
**+ MICROSOFT**

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Better Together

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“OpenText is one of our premier content management partners and together we are delivering solutions that enable organizations to use business information to achieve strategic advantage. I expect that OpenText will continue to play an important role in our product development efforts aimed at creating new content management technologies that will help our customers optimize business processes, reduce costs, and utilize information in increasingly powerful ways.”

— Steve Ballmer, Chief Executive Officer, Microsoft

“By furthering our close collaboration, OpenText and Microsoft® are creating a new dynamic in the marketplace and raising the bar for effective ECM in major industries such as energy, government, financial services and legal. In each case, we’re demonstrating the power of combining productivity applications from Microsoft with OpenText’s information governance solutions and industry-specific ECM expertise. Our Microsoft relationship is a critical part of our strategy and we will continue to be a leader in bringing new solutions for the Microsoft platform to market.

— John Shackleton, Chief Executive Officer, OpenText



# OPENTEXT + MICROSOFT = ENABLING A HOLISTIC ECM STRATEGY



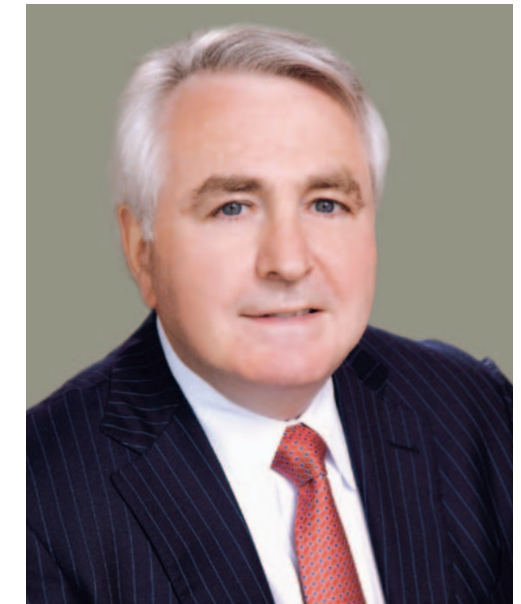
Microsoft, a leader in business productivity solutions, and OpenText, the Content Experts, enjoy a rich, collaborative relationship that helps our Enterprise Content Management customers lower costs, increase productivity, accelerate innovation, improve business agility, and ensure compliance with company and regulatory mandates.

Together, OpenText and Microsoft enable organizations to execute on a truly holistic ECM strategy that balances the need for user adoption and ease of use with the requirements of corporate compliance, governance, and risk management.

Our work together is driven by three core tenets – that our business solutions should help customers:

- Enable an effective, ECM-driven corporate compliance framework
- Aggregate content within business context while maximizing its value and reducing the cost of managing it
- Easily deploy Microsoft SharePoint® sites with built-in compliance and simplify the deployment of tailored business applications

+ Steve Ballmer, Chief Executive Officer, Microsoft  
John Shackleton, Chief Executive Officer, OpenText



# ENABLING CORPORATE COMPLIANCE

**Being compliant and promoting good governance is about more than mitigating business and legal risk. It helps ensure the long-term success and quality of operations throughout your organization.**

Organizations face an unprecedented level of pressure from mounting regulations, litigation, and the need for stringent information 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 mandates.

Progressive organizations are investigating ways to break away from the traditional, manual, and cost-intensive approach to GRC 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.

+ "For us, user adoption and ease of use, not to mention ease of deployment, were top considerations when looking at email management solutions. We liked OpenText's solution because users could still work 100 percent in the Microsoft interface and very little was required of them to maintain our records policies. Employees get a system that helps them be productive, while we get a comprehensive system that can uniformly apply records policies to email in order to meet legal and regulatory requirements."

— Greg Brown, Senior Project Manager, Records Information Management, Halliburton Legal

## **That's where OpenText + Microsoft come in.**

By complementing existing investments in their Microsoft infrastructure with leading ECM capabilities of OpenText, 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 with OpenText technology.

## **OpenText + Microsoft in Action**

### **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:** OpenText ECM Suite > OpenText Email Management for Microsoft Exchange and OpenText Application Governance & Archiving for Microsoft Sharepoint



# BUSINESS CONTENT IN CONTEXT

**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.**

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.

Businesses 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.

#### **That's Where OpenText + Microsoft Come In**

By working with Microsoft and OpenText, 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.

OpenText stands unmatched in its ability to surface relevant business content and metadata from enterprise systems and enable users to leverage that content in their business context and environment of choice, including Microsoft SharePoint, Outlook®, web interface, and mobile devices.

+ "Our customer service workers have near-instant access to customer-related information and are able to answer email without wasting time searching for or requesting information from others. This is an invaluable benefit."

— Marco Kurz, Project Manager, ThyssenKrupp Nirosta

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

#### **OpenText + Microsoft in Action**

##### **Global Energy Company**

A large energy company wanted to roll out Microsoft SharePoint to facilitate better collaboration across departments OpenText and Microsoft delivered.

Under a tightly-controlled deployment model, SharePoint was implemented to facilitate the creation and organization of content and the collaboration around it, all with built-in compliance provided by OpenText. All content required to maintain "corporate memory" is now sent to an OpenText repository for long term storage, retention, and disposition in accordance with corporate policy and regulatory mandate.

When this same energy company recognized the need to be better prepared for (and reduce the costs of) litigation, they turned to OpenText 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 OpenText repositories.

**Products used include:** OpenText Application Governance & Archiving for Microsoft Sharepoint, OpenText Document Management, OpenText Records Management, OpenText eDiscovery Early Case Assessment powered by Recommind (for eDiscovery and litigation support).



# EASY DEPLOYMENT, BUILT-IN COMPLIANCE

**Enterprises are exploring ways to maximize the value gained from their SharePoint deployments, as well as streamline expansion and drive efficiencies through tailored content-centric applications. Together, OpenText and Microsoft deliver.**

The value of Microsoft SharePoint Server as a collaborative platform 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.

As Microsoft SharePoint 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.

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.

#### **That's Where OpenText + Microsoft Come In**

With applications built for the Microsoft platform, OpenText brings together the strengths of the ECM Suite with Microsoft technologies to deliver business content in the context of the user's environment. OpenText works with customers to ensure smooth enterprise deployments and management of SharePoint environments together with their business applications.



OpenText and Microsoft work closely together to ensure the highest degree of functionality for customers. OpenText has strong expertise in several industries and application spaces, including: oil and gas, utilities, natural resources, financial services, public sector, law firms and corporate legal departments, healthcare, manufacturing, entertainment, telecommunications, pharmaceuticals, and life sciences. This expertise combines the strengths of OpenText and Microsoft together within tailored industry solutions for SharePoint without the need for extensive configuration or custom code.

Additionally, OpenText provides a rich development environment for its extensive partner network so they can build applications to meet the specific needs of industry customers.

#### **OpenText + Microsoft In Action**

##### **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.

Because of OpenText's investments and commitment to developing rich business applications that tie OpenText ECM Suite and Microsoft SharePoint together, they were able to bring in a system created to work the way users in the legal department operate without significant customization.

**Products used include:** OpenText Application Governance & Archiving for Microsoft Sharepoint and OpenText Legal Content Management for Microsoft SharePoint.

# SEE OUR SOLUTIONS FOR YOURSELF

**With Microsoft and OpenText applications, users can make the most of their traditional and “persuasive” content. OpenText and Microsoft demonstrate some of the available scenarios within the Microsoft Technology Center environment.**

OpenText was selected by Microsoft as their ECM partner in a program called Partner Led Solution Area Strategy Briefings at Microsoft Technology Centers. This global program enables OpenText and Microsoft teams to demonstrate a variety of business scenarios to customers that leverage both Microsoft and OpenText components to meet customer needs.

#### **Overview of our available demonstration scenarios:**

##### **Content Lifecycle Management**

Using OpenText 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 systems, 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.

##### **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 OpenText 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 OpenText’s new FAST ESP connector that extends the value OpenText ECM Suite delivers to the Microsoft infrastructure.

##### **Electronic Document and Records Management System**

Records Management is clearly one topic that makes OpenText unique. We are a leading provider of global records management capabilities in SharePoint (DOD 5015.2 version 3 certification as well as international standards certifications for the Victorian Electronic Records Strategy—VERS—in Australia, and the Model Requirements for the Management of Electronic Records—MoReq—in Europe). Additionally, OpenText provides a comment set of policies and records management capabilities across various silos of business content, including email and SAP® systems.

This scenario demonstrates how a common set of policies can be set up, used, and managed for email, SharePoint, or virtually any other source of business content. Defensible disposition and detailed auditing capabilities are other benefits that result in strong ROI cases for the customer.

##### **Tailored Business Solutions for Microsoft SharePoint by OpenText**

OpenText Solutions for Legal Content Management approach the customer from a different angle. Here we demonstrate all the benefits of OpenText 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 OpenText technology. All of this comes together to show that OpenText SharePoint solutions are definitely enterprise-ready.

##### **Enabling a Holistic View of Business Critical Content**

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 enterprise applications.

If business-critical content, such as SAP content created and managed using OpenText Extended ECM *for SAP Solutions*, is made accessible through SharePoint, new ROI and process improvements can be achieved by customers. We even go one step beyond this and demonstrate how SharePoint content can become an SAP business object via the OpenText ECM Suite and drive more value.

# MICROSOFT + OPENTEXT – BETTER TOGETHER

As OpenText, we are The Context Experts. Organizations not only look to us for technologies but also for guidance and best practices on how our solutions work in practice and on a truly enterprise and massive scale. On our way to earning a reputation for excellence and leadership in Enterprise Content Management, OpenText 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 OpenText's wealth of experience in all aspects of business content 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, OpenText 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 an unprecedented level of access to content within business context, support for corporate compliance, and long-term corporate memory that organizations require.

After more than 10 years of working with Microsoft to deliver the most sophisticated content management components and applications available, OpenText 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.

OPENTEXT **Microsoft**

## OpenText + Microsoft – Enabling a Holistic ECM Strategy

For product details, whitepapers, an ROI calculator, and more, visit the OpenText + Microsoft – Better Together site at: [www.bettertogethercentral.com](http://www.bettertogethercentral.com)

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