Improving key business processes inside Microsoft® Office 365®, Salesforce®, and SAP® with OpenText™ Extended ECM

OT Live Webinar

September 17, 2019
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“OpenText Elite™ has provided us with the opportunity to influence OpenText solution roadmaps, connect with other like-minded customers across the globe, and allow us to offer valuable learning and networking opportunities that would otherwise not be available to our staff.”

_Erin Gendron_
Information Management Solutions

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Agenda

Introduction – Extended ECM
Demo Scenario – *Sales order escalation*
Extended ECM for Microsoft Office 365 & Customer use case
Extended ECM for Salesforce & Customer use case
Extended ECM for SAP Solutions & Customer use case
Rethink...

- How users access content
- How to get an Information Advantage
- How your staff work together
- How your information is governed
- How content supports your business processes
...when content ISN’T MANAGED inside business processes

Fragmented content prolongs cycle time
Content locked in silos and fragmented applications results in manual search and retrieval, delays and error resolution time that impact cycle time.

Out of control content is a compliance risk
Content not disposed of or not retained as legally required creates compliance risks and can ultimately also have financial consequences.

Inconsistent information decreases productivity
Inconsistencies between Salesforce data and documents result in rework costs and negatively impact performance and productivity in every business function.

Inaccessible content impacts service and product quality
Inability to find information results in uninformed decisions that impact service and product quality and frustrate both employees and customers.

Disconnected content delivers less value
Aged content disconnected from business apps and processes turns into a legacy and cost driver instead of being used as a competitive advantage.

Inefficient content flows disrupt collaboration
Content silos lead to inefficiencies in interdepartmental and external collaboration.
Unlocking the Information Advantage

**Content**
- Documents
  - Financial documents
  - Quotations, contracts
  - Invoices, etc.
- Digital Media
  - Product collateral
  - How-to videos, ...

**+ Context**
- Business Data
  - CRM & eCommerce
  - ERP & supply chain
  - HR / HCM
- Business Information Model
  - Business objects
  - Business object relations

**= Value**
- Increased Productivity
- Better Engagement
- Business Insight
- Control (Compliance)

Consistent – Relevant – Personal – Connected
OpenText Extended ECM
Connects people and information across applications

- Provides seamless integration of comprehensive ECM capabilities
- Ties processes and information together in business workspaces:
  - Business content from Extended ECM, with Business data from business applications
- Deeply connects data, relationships, and roles
- Metadata is automatically applied adding context
DEMO

Sales order escalation scenario
Extended ECM Demo Overview – Content in Context

Content editing & Collaboration

Access content & insights inside process

Improved productivity & order processing
Extended ECM for Microsoft® Office 365®

Overview & Customer use case
Extended ECM for Microsoft Office 365®

**BCS / USER PRODUCTIVITY**
- Teams
- Skype for Business
- SharePoint
- OneDrive
- Outlook
- Content creation and retrieval
- Communication
- Ad-hoc collaboration and sharing
- Good-enough lifecycle management

**TCS / PROCESS PRODUCTIVITY**
- Extended ECM/Connected Workspaces
- Records Management
- AGA
- Extend content services into business process
- High-end DM
- Repeatable collaboration
- Intelligent capture and automation
- Records management
- Archiving

Transactional Business Apps
- Asset Data
- Finances
- HR
- Work Management
- Supply Chain

Extended ECM
Joining Collaboration, Governance and Control

▪ Connect business processes to informal collaboration and communication tools
▪ Structured use of Office365 collaboration tools
▪ Frictionless flow of information and documents between Office 365, Teams and Extended ECM
▪ Co-Authoring directly from Extended ECM Widgets or interface
ECMWF advances global weather prediction with help from OpenText

International organization working on weather forecasting ensures scientific accuracy, collaboration for preparedness with OpenText Content Services solutions

“The success we have had with our OpenText colleagues is quite impressive.”
Mithat Ersoy
Senior System Analyst
ECMWF
Extended ECM for Salesforce®

Overview & Customer use case
Extended ECM for Salesforce®
Allow sales and service agents to stay focused

- Embedded Account Workspace
- Lightning or Classic Salesforce User Interface
- Sales, Service or Industry Cloud
- Templated creation of underlying structures when triggered inside Salesforce
- Sophisticated Integration
- Community Cloud
- AppExchange
We are using OpenText to consolidate and streamline information flows inside KUKA and beyond. The connectivity of Extended ECM to our strategic applications from SAP and Salesforce helps to improve efficiencies, gain insight and serve our customers better.

Kristijan Jarc
EIM Project Lead
Extended ECM for SAP® Solutions

Overview & Customer use case
Extended ECM for SAP® Solutions

Information Processing
Capture and recognition, classification and indexing, content filing, high volume ingestions & migration, ...

Information Management
Workspace templates, business metadata inheritance, related business content; desktop integration

Information Governance
versioning, attachments archiving, Security inheritance, records management, long term storage, Workspace roles, ...

Information Delivery
Content access, navigation, search, notification, view and annotate, mobile, file sync and share, ...

Any content can be associated with any SAP business object, using out of box integrations
Share content across departments without risk

- Immediate access to required content inside the business application minimizes manual work.
- Less risk of errors in processes by all information available to all business users instantly.
- Share content across departments and across different leading applications
  - SAP S/HANA, C/4HANA, ERP, Finance, PLM, ECC…
- Reduce risk and enable compliance such as GDPR, CCPA, POPPI and many others, for all SAP & non-SAP related content
UNIDO accelerates inclusive and sustainable industrial development in over 130 countries

OpenText Extended ECM for SAP enables UNIDO to automate and integrate enterprise content processes

“OpenText solutions integrated with SAP supports our core business and administrative processes—it is everywhere in our organization and helps us deliver on our mission. With OpenText Extended ECM for SAP Solutions, it’s now faster and easier for our people to find the files and information they are looking for.”

Peter Holzeitner
Team Leader, ECM and Infrastructure
United Nations Industrial Development Organization
OpenText Extended ECM

Unlock the Information Advantage

- Simple access to business content at the time of need accelerates business process
- A single source of truth across the organization provides valuable insights
- Improved user collaboration maximizes operational efficiencies and outcomes
Thank you

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