



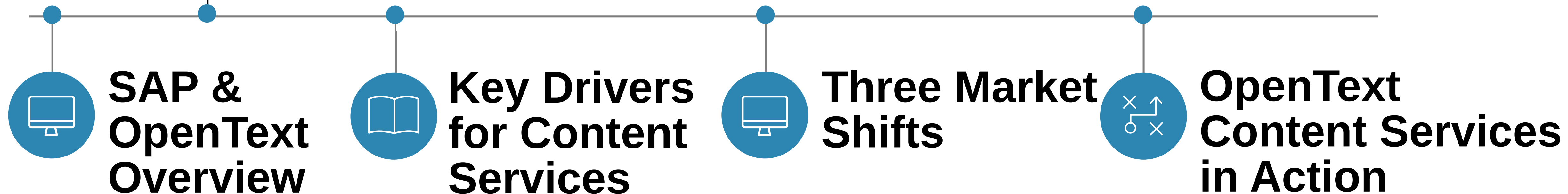
Redefining Content Services with OpenText

Learn how to seamlessly put your business content in context of your
ERP, CRM and Office365 applications

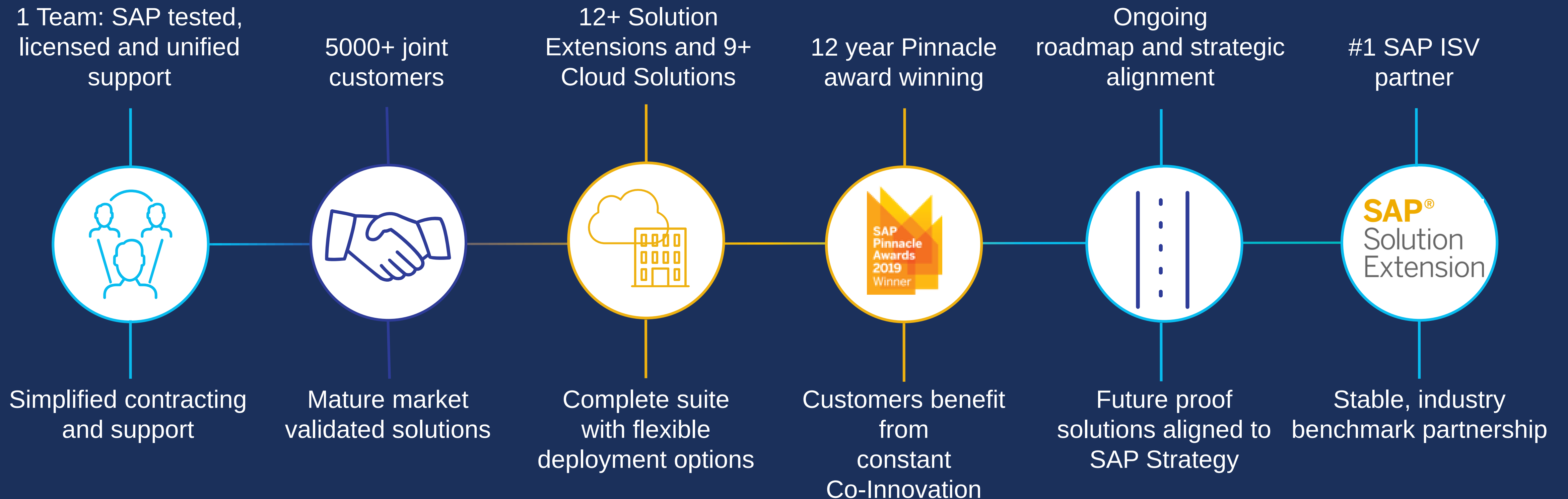
October 2019 | Kristoffer Rohde



Agenda



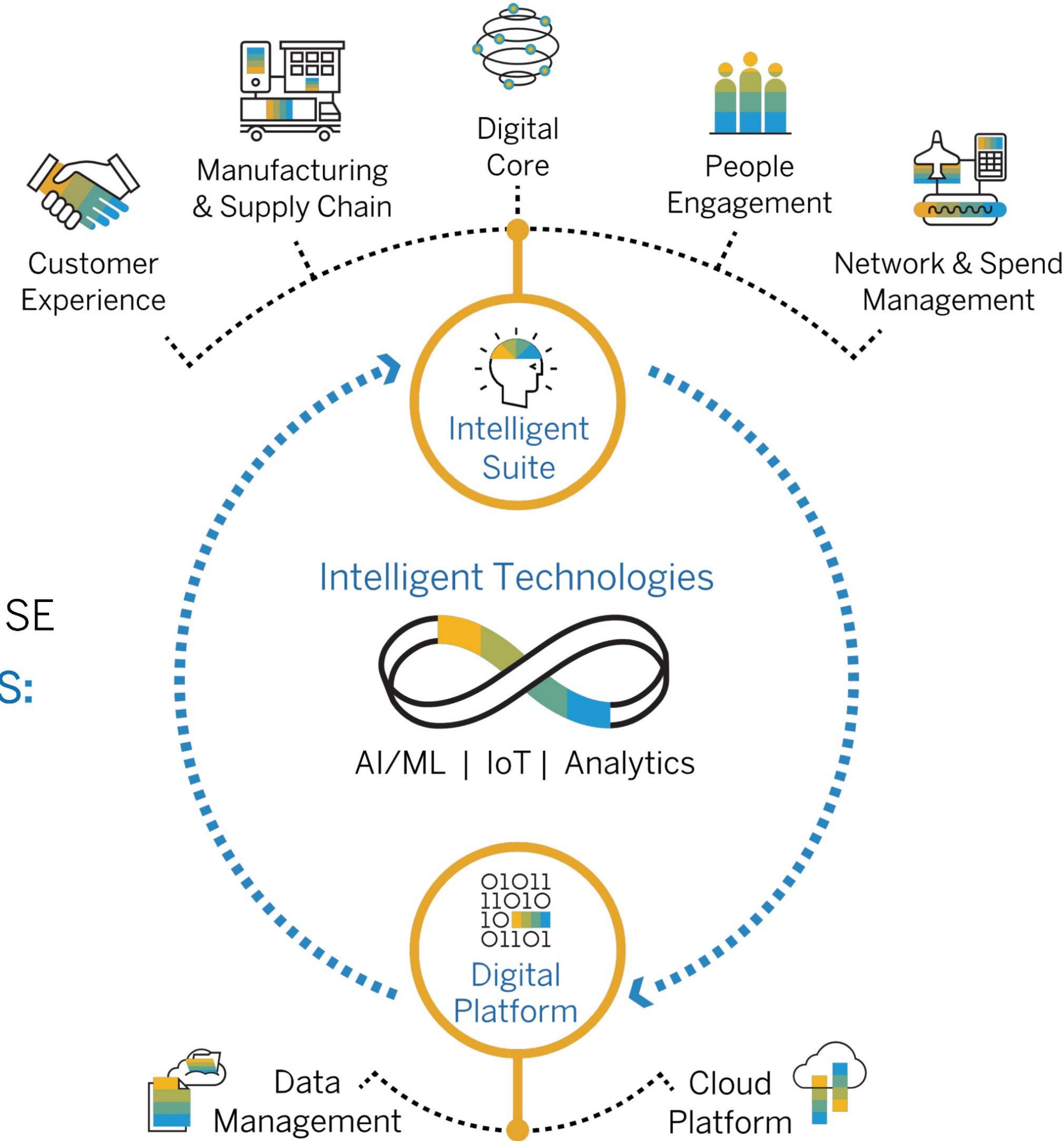
OpenText and SAP



The market leading **Digital Content Platform** supporting SAP customers to gain the **Information Advantage** and become **Intelligent and Connected Enterprises**

The Intelligent Enterprise Framework

THE INTELLIGENT ENTERPRISE
features **3 KEY COMPONENTS**:

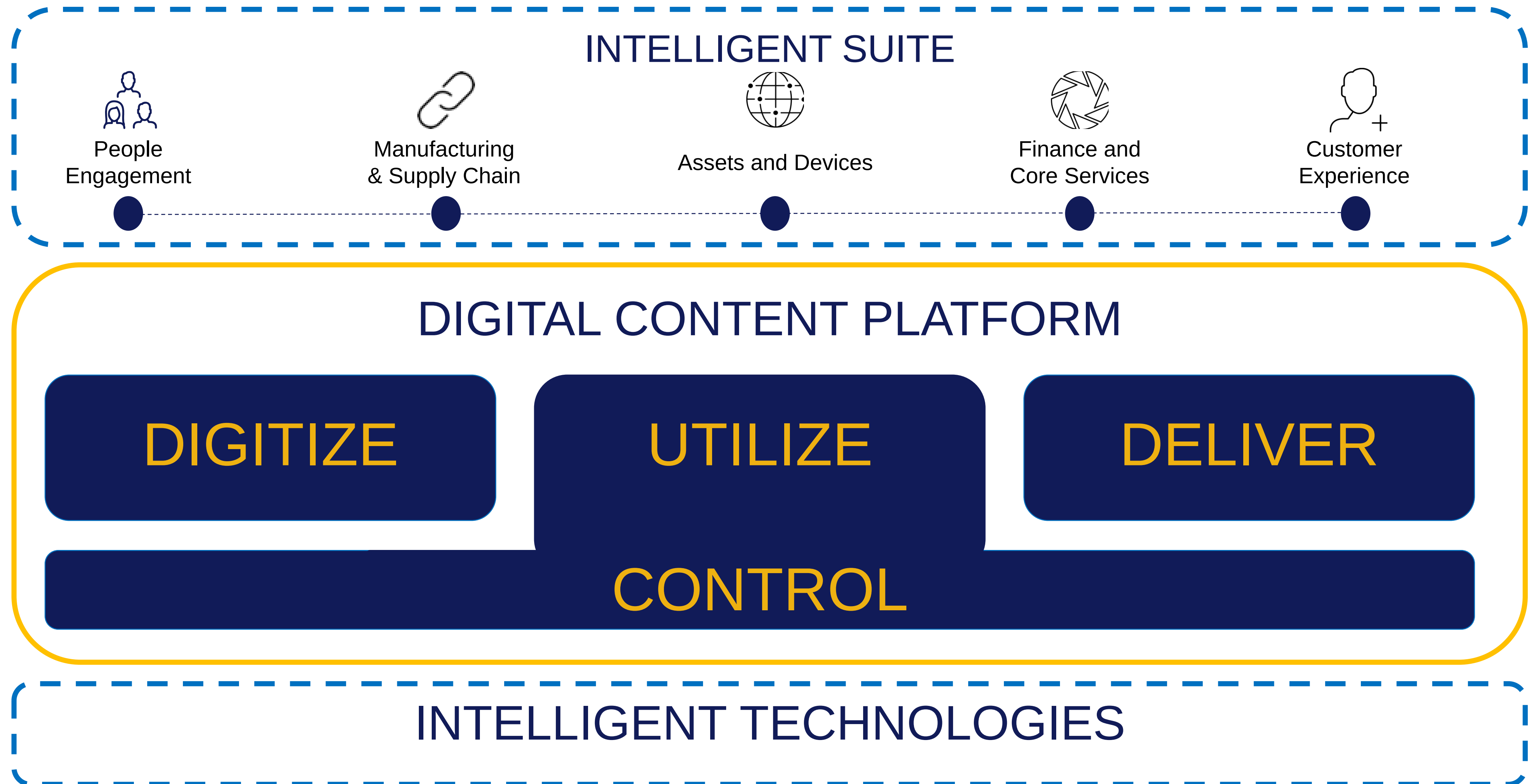


1 Intelligent Suite

2 Digital Platform

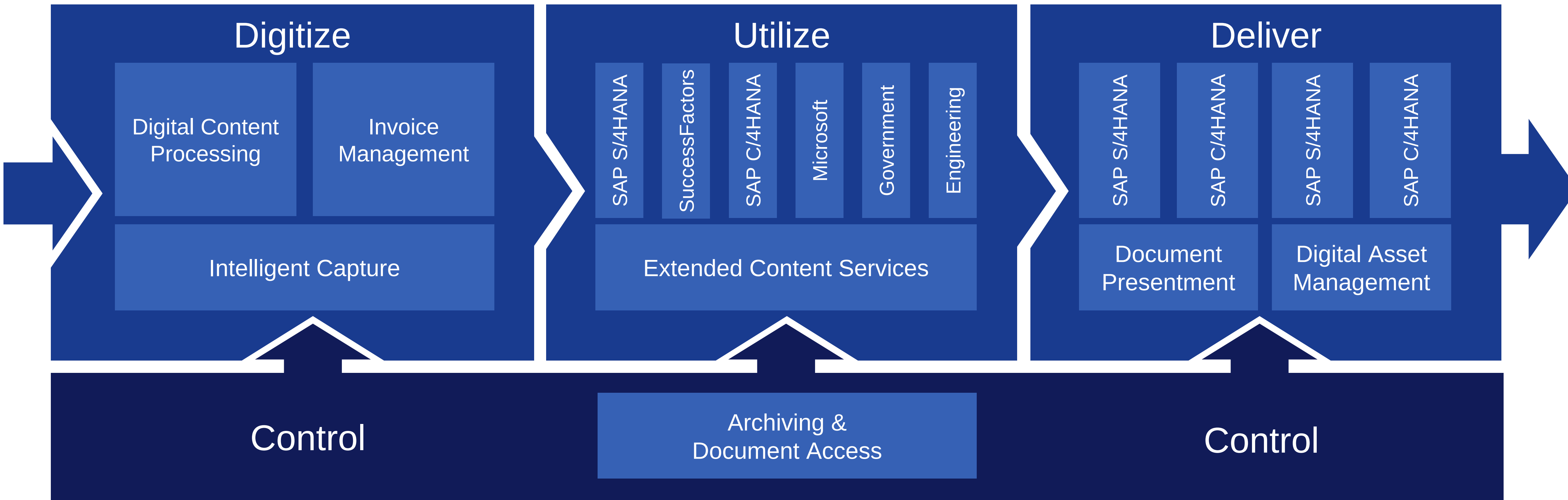
3 Intelligent Technologies

Digital Content Platform by OpenText



OpenText Solutions for SAP

SAP S/4HANA | SAP Ariba | SAP C/4HANA | SAP SuccessFactors | Microsoft



OpenText fully supports HANA and S/4HANA



- Support latest S/4HANA releases typically 3 month after SAP release
- Cloud & On-Premise
- End-to-End Fiori® and Mobile-ready
- Integrated with SAP Cloud Platform
- Powerful Content Management Services

100% qualified for
SAP S/4HANA

Complete SAP
OpenText ECM portfolio
proven and tested to work
with S/4HANA

100% powered
by HANA

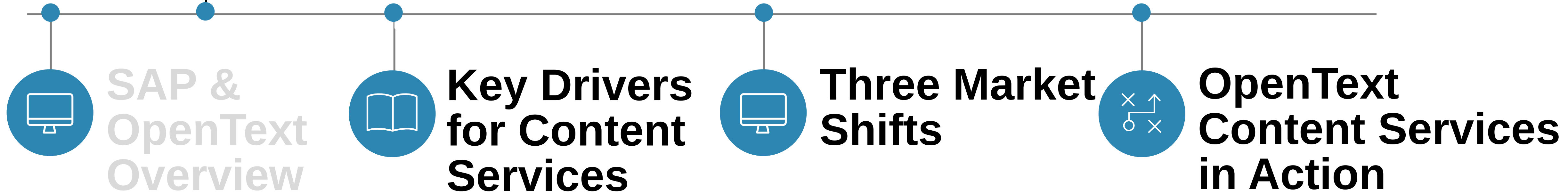
Archiving, Doc. Access,
Invoice Mgt., Business Center, Extended
ECM SAP, Document Presentment,
Digital Asset Management

100% running in
SAP Fiori®

Doc. Access, Invoice Mgt., Business
Center, Extended ECM, Document
Presentment, Digital Asset Management
– including support for Fiori 2.0
(e.g. Smart Links)



Agenda



Why organizations adopt Content Services solutions

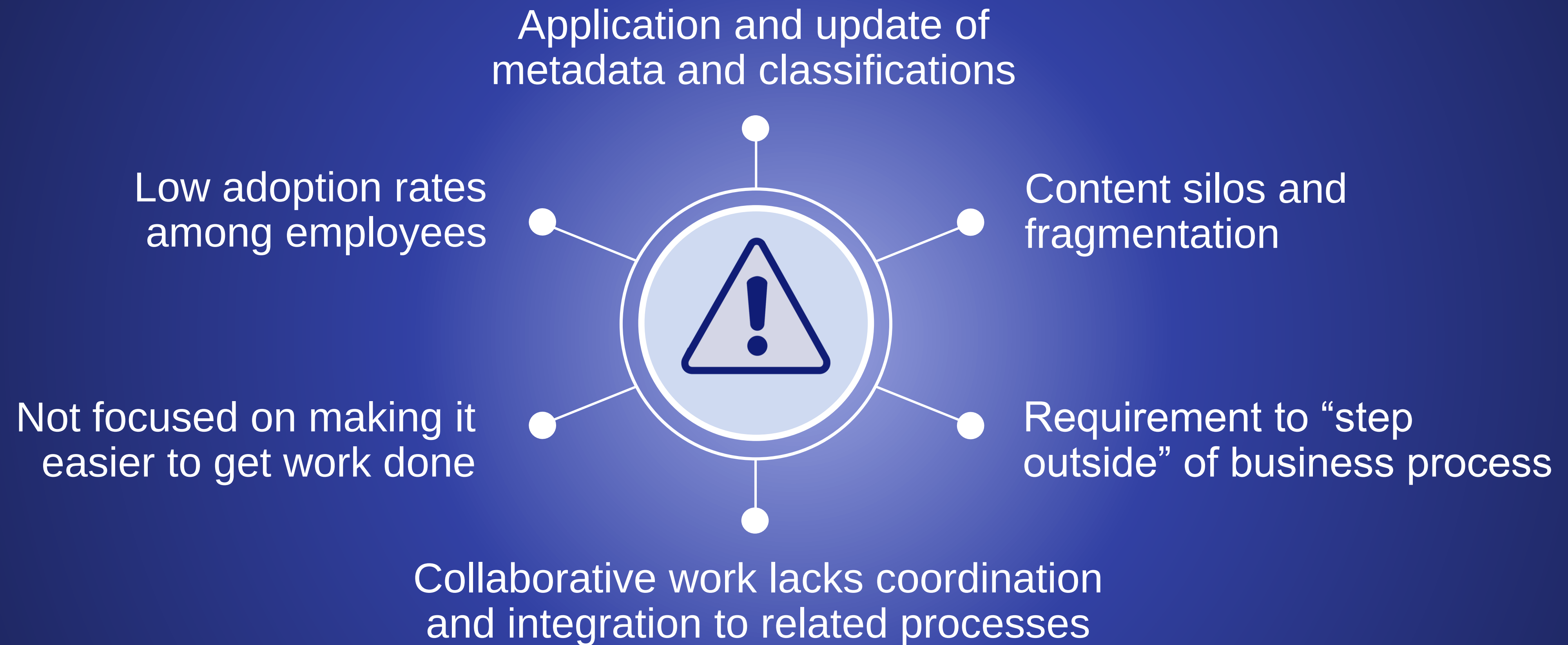


- Effective information sharing across enterprise
- Content as fuel for business processes

- Provide the right version of the right document when it's needed
- Reduce re-work, errors, search time, etc.

- Regulatory records retention
- Data protection & privacy

Challenges faced with traditional content solutions



Three market shifts (#1)

A redefinition of ECM.
Less about monolithic
systems, more about
being embedded in
processes and systems.

OpenText has completely
redefined the market with
Extended ECM

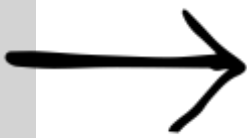
The screenshot displays the SAP S/4HANA interface for a customer record. On the left, a list of customers is shown, with 'Global Trade AG' (50031) selected. The main area shows details for this customer, including its country (DE) and city (Frankfurt). A 'Workspace' bar at the top contains icons for Info, Workspace, Documents (16), and Related. Below this, a table lists documents for 'Global Trade AG (50031)'. The table has columns for checkboxes, Type, Name, Size, and actions (comment, star, search, share). The documents are categorized into folders like '01 - Account Management', '02 - Meetings', '03 - Correspondence', '04 - Onsite Reports', '05 - Opportunities', and '06 - Sales Quotations'.

Checkbox	Type	Name	Size	Actions
☐	Folder	01 - Account Management	28 items	Comment, Star, Search, Share
☐	Folder	02 - Meetings	55 items	Comment, Star, Search, Share
☐	Folder	03 - Correspondence	65 items	Star, Search, Share
☐	Folder	04 - Onsite Reports	39 items	Comment, Star, Search, Share
☐	Folder	05 - Opportunities	1 item	Star, Search, Share
☐	Folder	06 - Sales Quotations	8 items	Star, Search, Share

Three market shifts (#2)

Adoption of
Office 365 in the
market

Our strategy is to
embrace and enhance



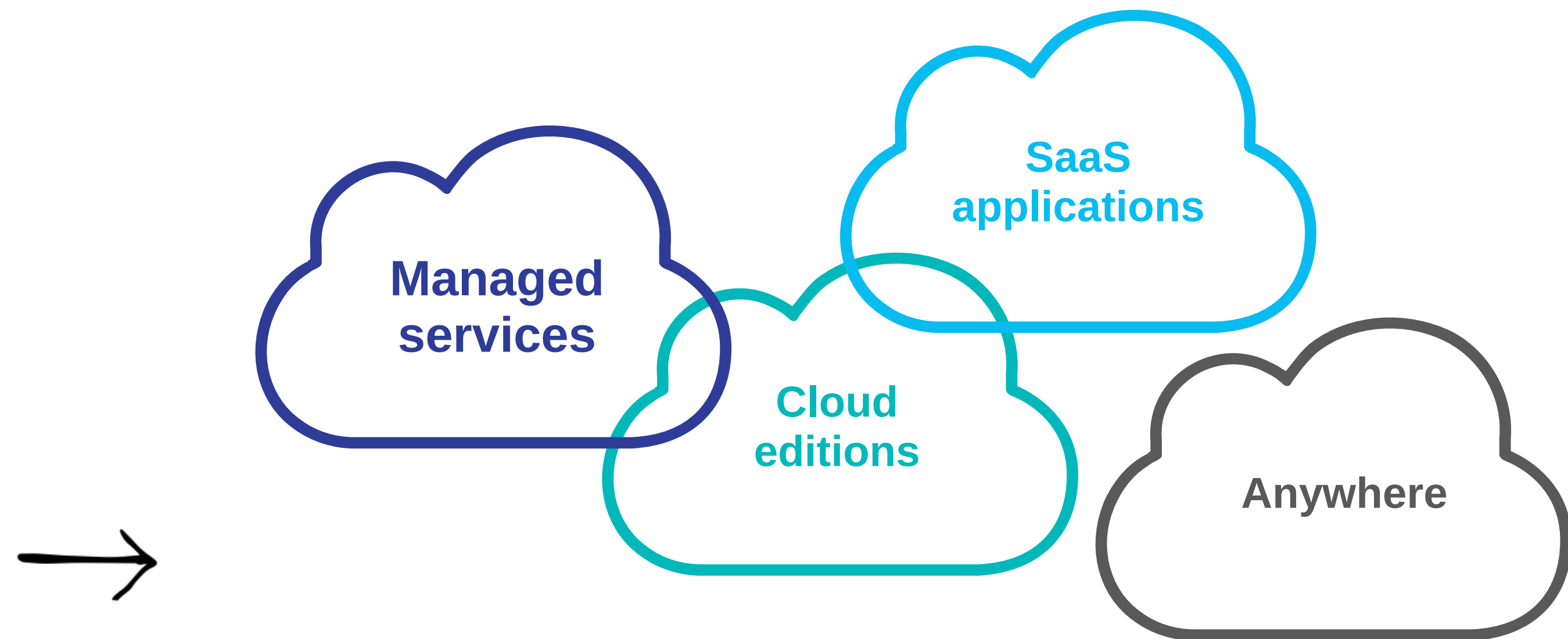
- Content creation & collaboration
- E.g. Microsoft Outlook, Teams, Office 365 groups, etc.

- Process & governance centric
- E.g. CRM, ERP, HRM, etc.

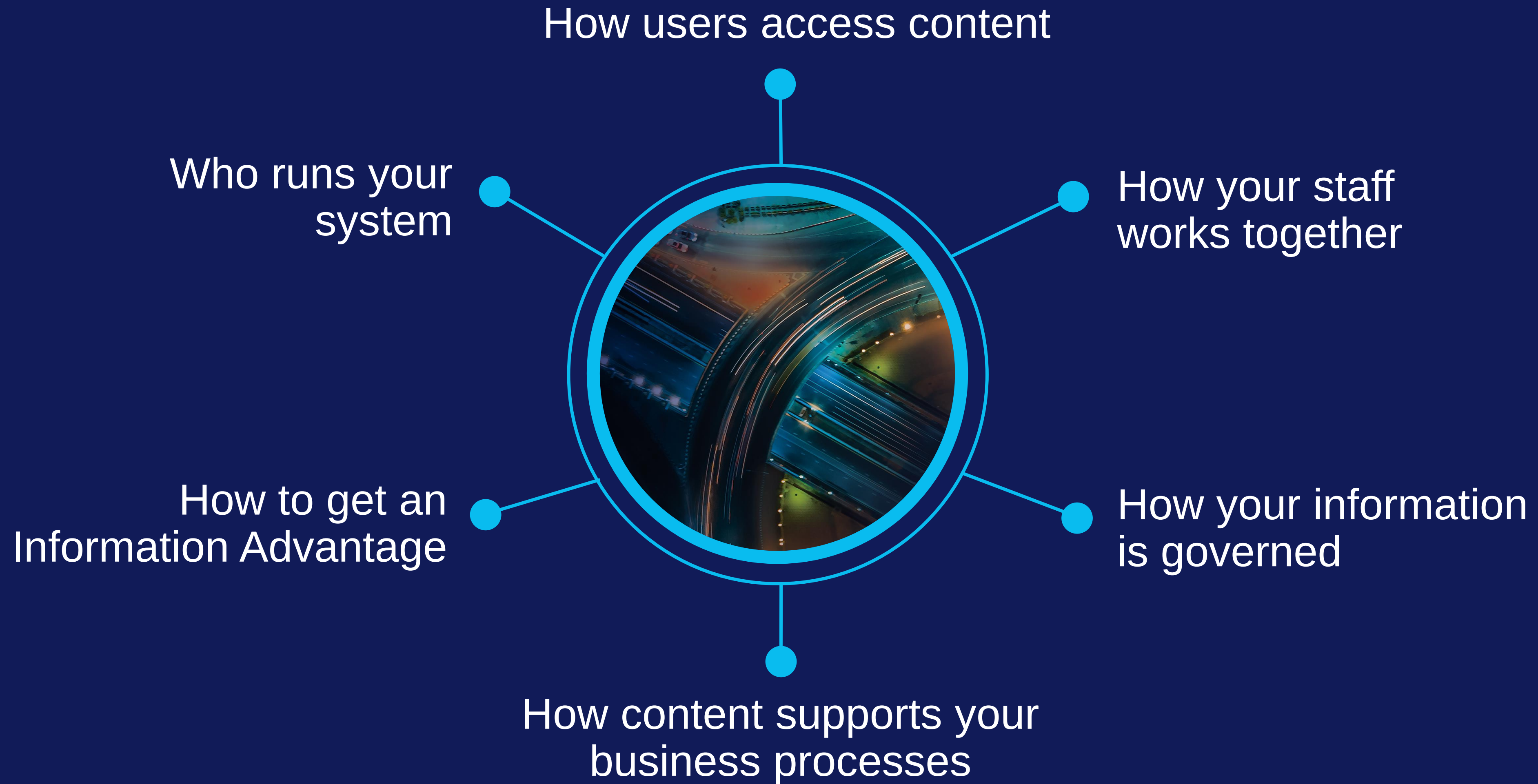
Three market shifts (#3)

Content Services
will be delivered in
the cloud or hybrid

We are all about
providing choice

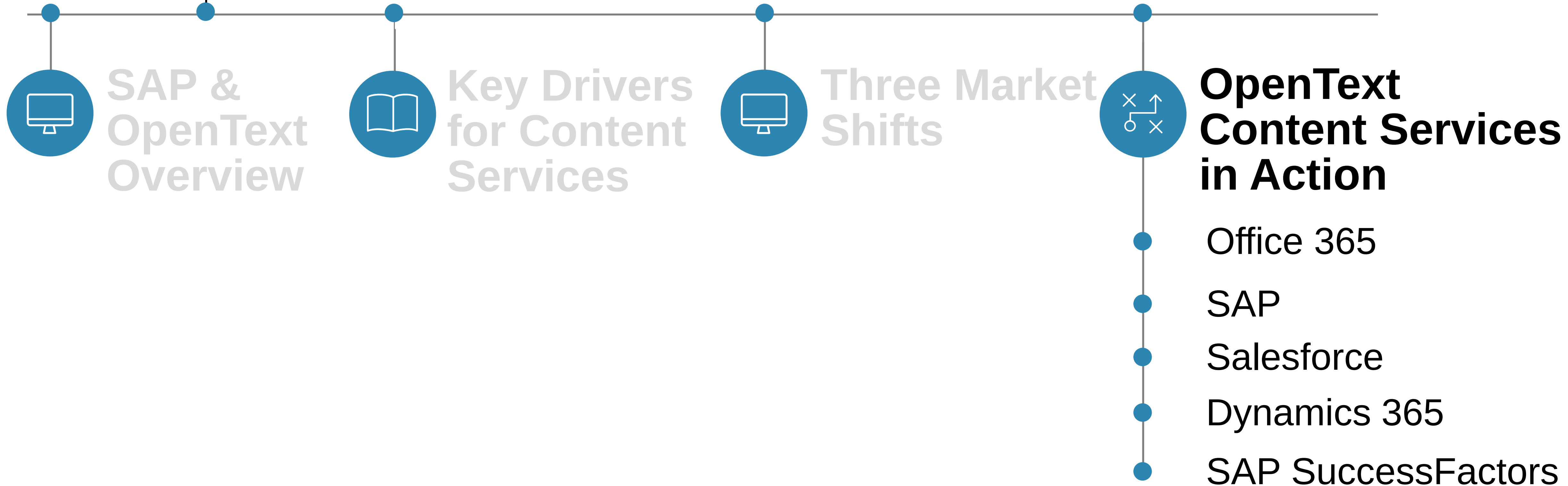


Rethink





Agenda



Examples:

Content Services in the context of
lead business applications

Documents in ECM system

 Global Trade AG (50031) 

[Overview](#) [Documents](#) [Map](#) [Office 365](#) [Discussion](#) [Related](#)

   Global Trade AG (50031)   1  

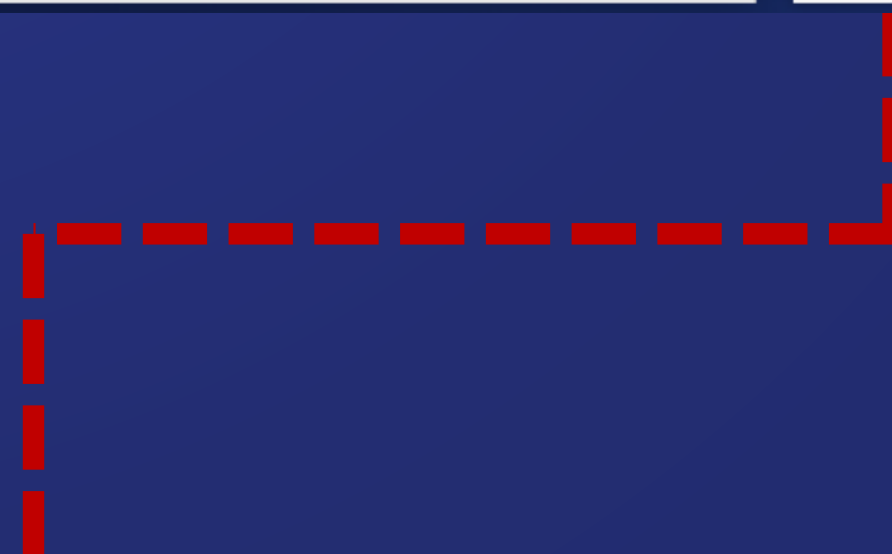
☐	Type	Name  		
☐		01 - Account Management		 
☐		02 - Meetings		 
☐		03 - Correspondence		 
☐		04 - Onsite Reports		 
☐		05 - Opportunities		 
☐		06 - Sales Quotations		 
☐		07 - Sales Contracts		 
☐		08 - Sales Orders		 
☐		09 - Deliveries		 
☐		10 - Support Cases		 
☐		11 - Invoices		 
☐		12 - Equipment / Assets		 

14 items

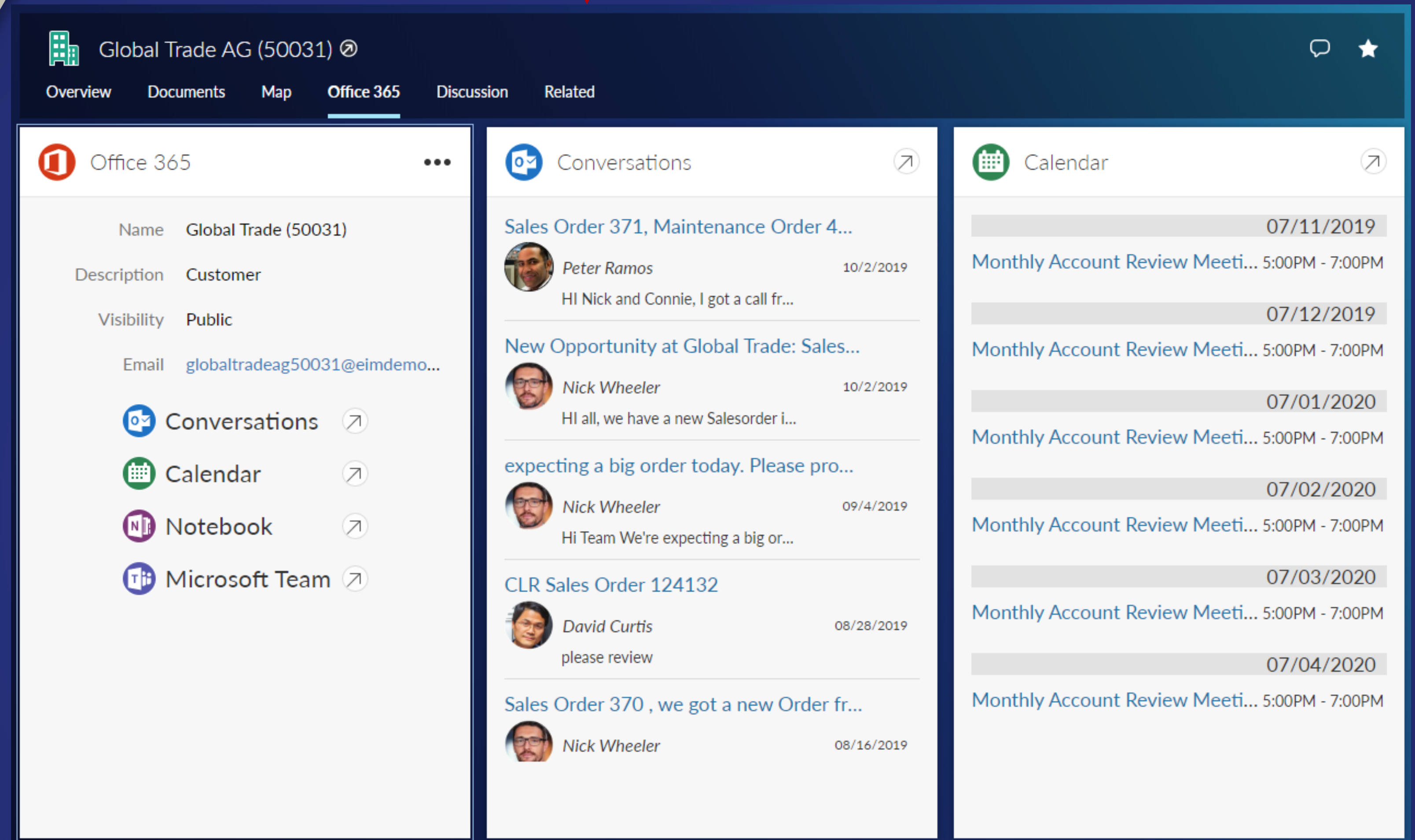
 Business attachments 



No business attachments to display.



Integrated to
Office 365



Global Trade AG (50031) ⓘ

Overview Documents Map **Office 365** Discussion Related

Office 365

Name Global Trade (50031)

Description Customer

Visibility Public

Email globaltradeag50031@eimdemo...

- Conversations ↗
- Calendar ↗
- Notebook ↗
- Microsoft Team ↗

Conversations

Sales Order 371, Maintenance Order 4...

 Peter Ramos 10/2/2019
Hi Nick and Connie, I got a call fr...

New Opportunity at Global Trade: Sales...

 Nick Wheeler 10/2/2019
Hi all, we have a new Salesorder i...

expecting a big order today. Please pro...

 Nick Wheeler 09/4/2019
Hi Team We're expecting a big or...

CLR Sales Order 124132

 David Curtis 08/28/2019
please review

Sales Order 370 , we got a new Order fr...

 Nick Wheeler 08/16/2019

Calendar

07/11/2019
Monthly Account Review Meeti... 5:00PM - 7:00PM

07/12/2019
Monthly Account Review Meeti... 5:00PM - 7:00PM

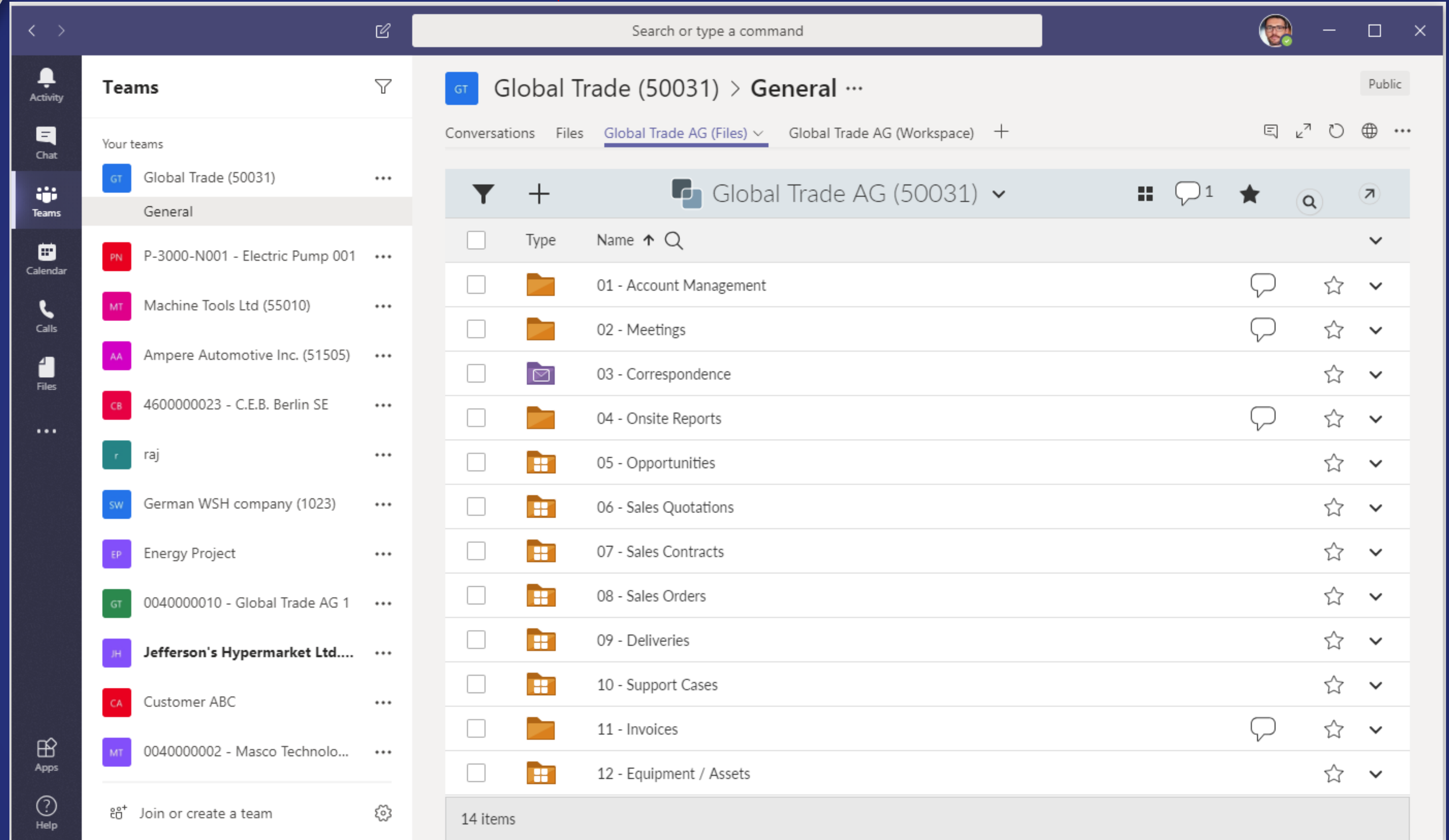
07/01/2020
Monthly Account Review Meeti... 5:00PM - 7:00PM

07/02/2020
Monthly Account Review Meeti... 5:00PM - 7:00PM

07/03/2020
Monthly Account Review Meeti... 5:00PM - 7:00PM

07/04/2020
Monthly Account Review Meeti... 5:00PM - 7:00PM

Integrated to
O365 Teams



Search or type a command

Global Trade (50031) > General ...

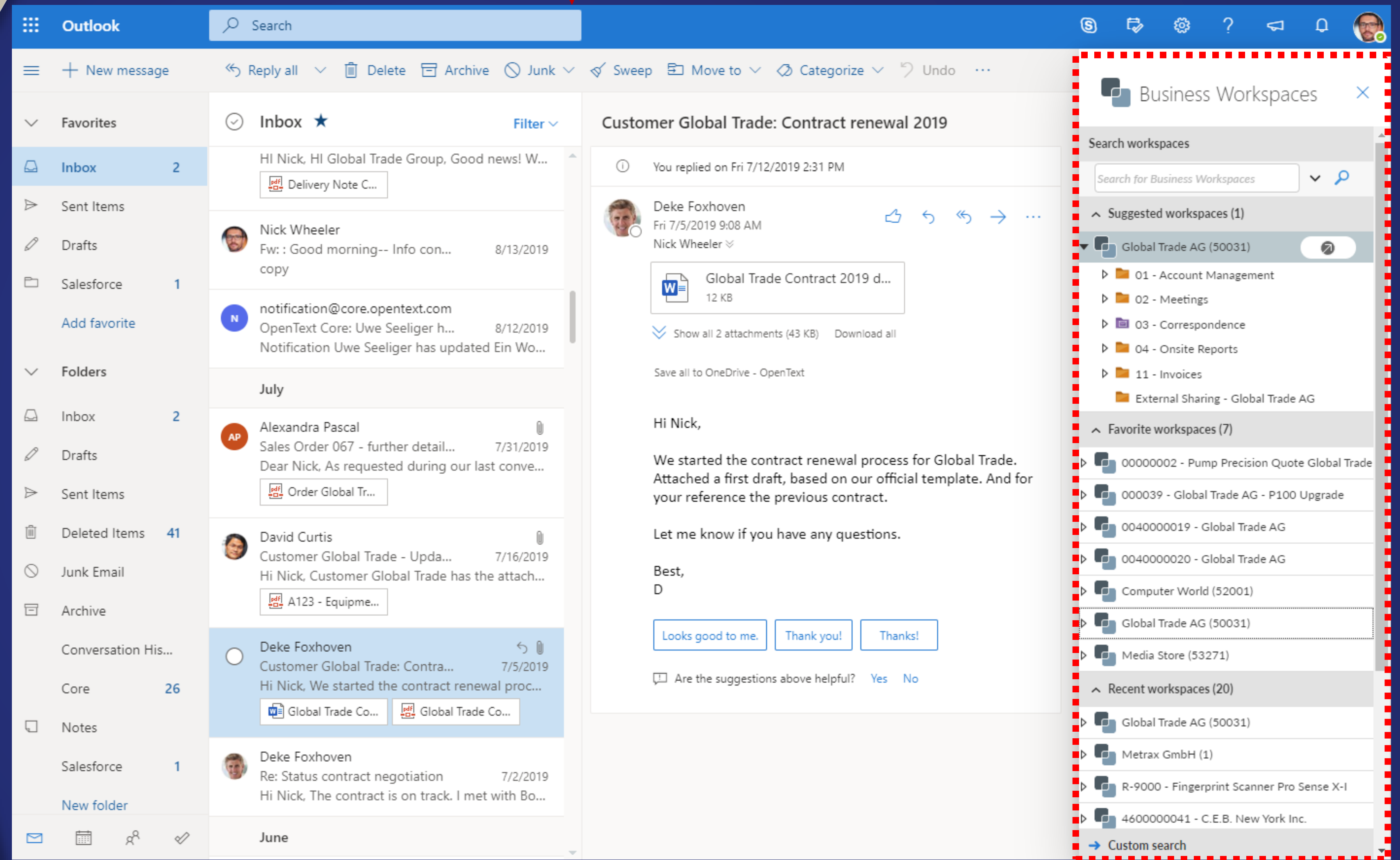
Conversations Files Global Trade AG (Files) Global Trade AG (Workspace) +

Global Trade AG (50031)

Type	Name	
Folder	01 - Account Management	
Folder	02 - Meetings	
Folder	03 - Correspondence	
Folder	04 - Onsite Reports	
Folder	05 - Opportunities	
Folder	06 - Sales Quotations	
Folder	07 - Sales Contracts	
Folder	08 - Sales Orders	
Folder	09 - Deliveries	
Folder	10 - Support Cases	
Folder	11 - Invoices	
Folder	12 - Equipment / Assets	

14 items

Integrated to
O365 Outlook



Outlook Search

+ New message | Reply all | Delete | Archive | Junk | Sweep | Move to | Categorize | Undo

Favorites

- Inbox 2
- Sent Items
- Drafts
- Salesforce 1
- Add favorite

Folders

- Inbox 2
- Drafts
- Sent Items
- Deleted Items 41
- Junk Email
- Archive
- Conversation His...
- Core 26
- Notes
- Salesforce 1
- New folder

Inbox Filter

HI Nick, HI Global Trade Group, Good news! W...
Delivery Note C...

Nick Wheeler
Fw: : Good morning-- Info con... 8/13/2019
copy

notification@core.opentext.com
OpenText Core: Uwe Seeliger h... 8/12/2019
Notification Uwe Seeliger has updated Ein Wo...

July

Alexandra Pascal
Sales Order 067 - further detail... 7/31/2019
Dear Nick, As requested during our last conve...
Order Global Tr...

David Curtis
Customer Global Trade - Upda... 7/16/2019
Hi Nick, Customer Global Trade has the attach...
A123 - Equipme...

Deke Foxhoven
Customer Global Trade: Contra... 7/5/2019
Hi Nick, We started the contract renewal proc...
Global Trade Co... Global Trade Co...

Deke Foxhoven
Re: Status contract negotiation 7/2/2019
Hi Nick, The contract is on track. I met with Bo...

June

Customer Global Trade: Contract renewal 2019

You replied on Fri 7/12/2019 2:31 PM

Deke Foxhoven
Fri 7/5/2019 9:08 AM
Nick Wheeler

Global Trade Contract 2019 d...
12 KB

Show all 2 attachments (43 KB) Download all

Save all to OneDrive - OpenText

Hi Nick,

We started the contract renewal process for Global Trade. Attached a first draft, based on our official template. And for your reference the previous contract.

Let me know if you have any questions.

Best,
D

Looks good to me. Thank you! Thanks!

Are the suggestions above helpful? Yes No

Business Workspaces

Search workspaces
Search for Business Workspaces

Suggested workspaces (1)

- Global Trade AG (50031)
 - 01 - Account Management
 - 02 - Meetings
 - 03 - Correspondence
 - 04 - Onsite Reports
 - 11 - Invoices
 - External Sharing - Global Trade AG

Favorite workspaces (7)

- 00000002 - Pump Precision Quote Global Trade
- 000039 - Global Trade AG - P100 Upgrade
- 0040000019 - Global Trade AG
- 0040000020 - Global Trade AG
- Computer World (52001)
- Global Trade AG (50031)
- Media Store (53271)

Recent workspaces (20)

- Global Trade AG (50031)
- Metrax GmbH (1)
- R-9000 - Fingerprint Scanner Pro Sense X-I
- 4600000041 - C.E.B. New York Inc.

Custom search

Integrated to
SAP

SAP Business Client

Customer - 50031

Global Trade AG (50031)

Overview Documents Map Office 365 Discussion Related

Global Trade AG (50031)

Type	Name		
Folder	01 - Account Management		
Folder	02 - Meetings		
Folder	03 - Correspondence		
Folder	04 - Onsite Reports		
Folder	05 - Opportunities		
Folder	06 - Sales Quotations		
Folder	07 - Sales Contracts		
Folder	08 - Sales Orders		
Folder	09 - Deliveries		
Folder	10 - Support Cases		
Folder	11 - Invoices		
Folder	12 - Equipment / Assets		

14 items

Business attachments

No business attachments to display.

Integrated to SAP Fiori

Customer (43)

Search in Customer

Global Trade AG

50031

Country: DE Sales Org: 1000

City: Frankfurt

Inovera GmbH

50580

Country: DE Sales Org: 1000

City: Stuttgart

Motec GmbH

50590

Country: DE Sales Org: 1000

City: Frankfurt

EVS GmbH

50611

Country: DE Sales Org: 1000

City: Düsseldorf

Computer Markt GmbH

50636

Country: DE Sales Org: 1000

City: Köln

MEGA Grosshandel GmbH

50643

Country: DE Sales Org: 1000

50031 - Global Trade AG

Country: DE Sales Organisation: 1000

City: Frankfurt

Info

Workspace

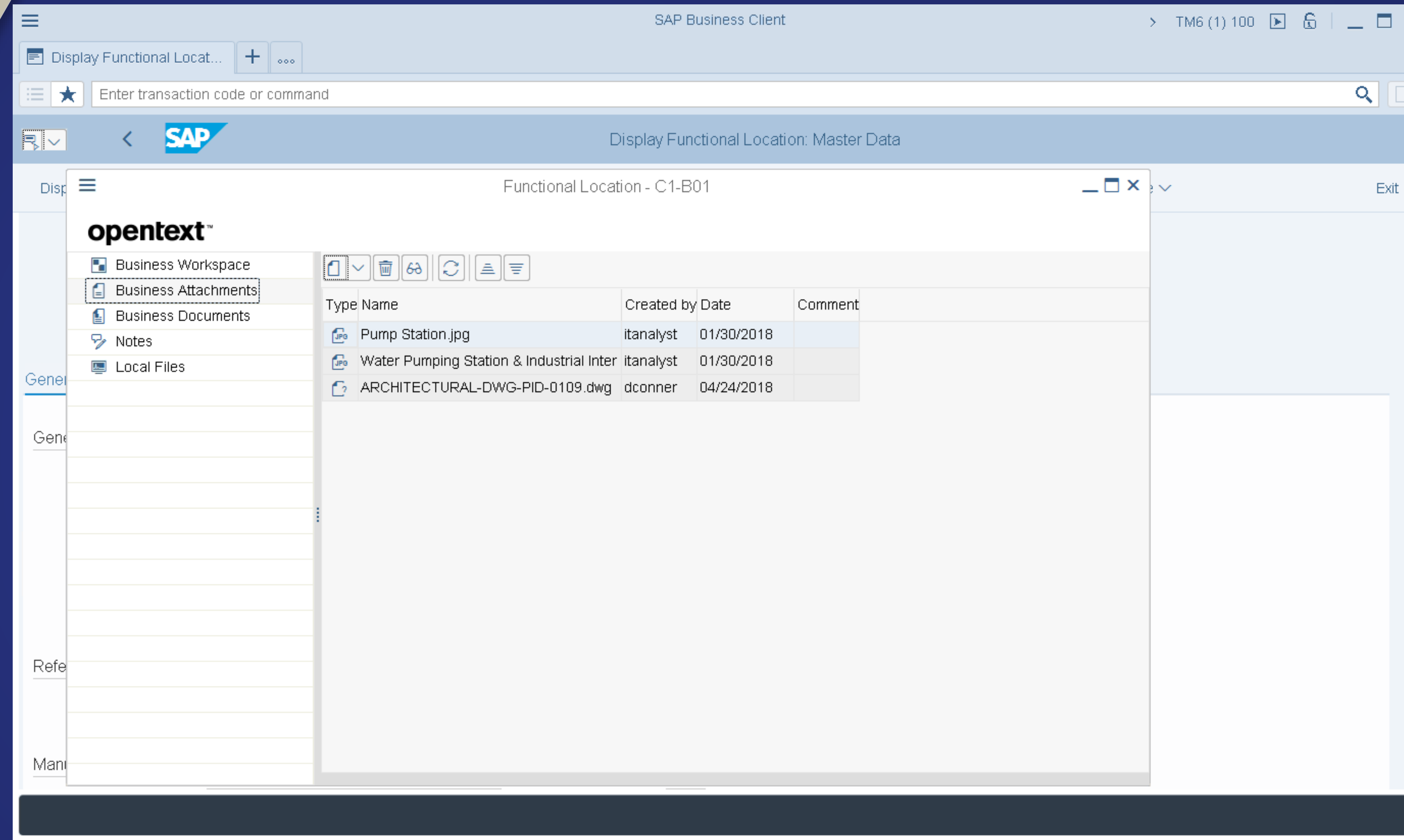
Documents22

Related

Global Trade AG (50031)

Type	Name		
01 - Account Management			
02 - Meetings			
03 - Correspondence			
04 - Onsite Reports			
05 - Opportunities			
06 - Sales Quotations			
07 - Sales Contracts			
08 - Sales Orders			
09 - Deliveries			
10 - Support Cases			
11 - Invoices			
12 - Equipment / Assets			

Integrated to
SAP PM



SAP Business Client

TM6 (1) 100

Display Functional Locat...

Enter transaction code or command

Display Functional Location: Master Data

Functional Location - C1-B01

opentext™

- Business Workspace
- Business Attachments
- Business Documents
- Notes
- Local Files

Type Name	Created by	Date	Comment
Pump Station.jpg	itanalyst	01/30/2018	
Water Pumping Station & Industrial Inter	itanalyst	01/30/2018	
ARCHITECTURAL-DWG-PID-0109.dwg	dconner	04/24/2018	

Integrated to
SAP AIN

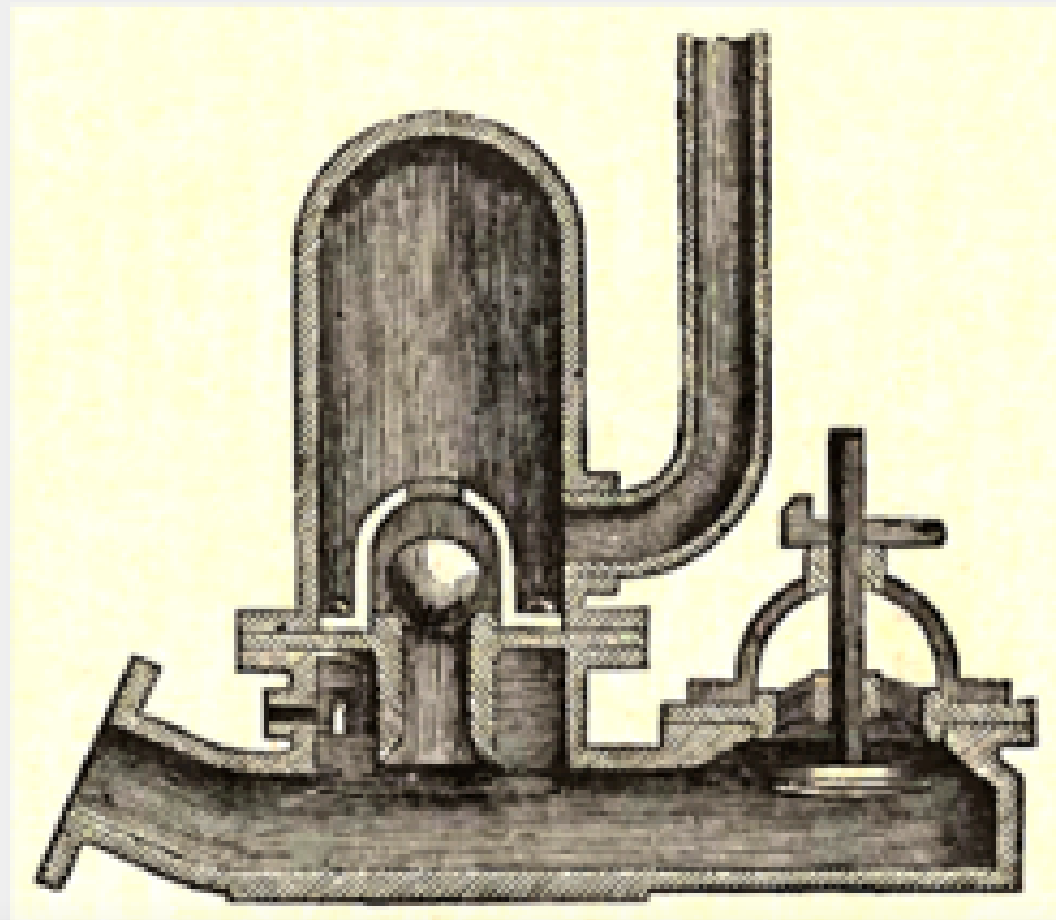
Innovate > Enterprise Asset Management > Equipment > AIN-DEMO Electric Pump 300-50

 AIN-DEMO Electric Pump 300-50
Equipment

Overview Documents Related Map **AIN Area**

 AIN Documents

Electric Pump / 300-50



Class	Top Drive
Subclass	Electrically driven
Description	Electric Pump
Manufacturer	Endress+Hauser
Created on	2016-12-06
Changed on	2016-12-06
Published on	2016-11-30

Model picture
from AIN

Model data
from AIN

 Pump Maintenance Checklist.pdf
Inspection Manual / 347 KB

 Pump Technical Bulletin TB33-02.pdf
Operations Manual / 388 KB

 Pump Technical Bulletin TB33-01.pdf
Maintenance Manual / 388 KB

 Pump Operating Manual.pdf
Operations Manual / 377 KB

 Pump Maintenance Manual.pdf
Maintenance Manual / 481 KB

List of documents
from AIN

Integrated to
SAP C/4HANA

Home

Calendar

Customers

Accounts

Contacts

Individual Customers

Sales

Sales Campaign

People

Activities

Analysis

Competitors

Products

Library

Activity Planner

Partners

Surveys

Business Configuration

Visits

Accounts

Customer Riverpark Center

Riverpark Center

OverviewWorkspaceMediaOpportunitiesSales QuotesLeadsAttachmentsFeedSales DataSales TerritoriesRegistered ProductsSales LeadsContactsActivities

Workspace

+

Riverpark Center (1000830)

	Type	Name	Size	Modified	Status
	Folder	01 - Account Management	0 Items	06/20/2018 1:35 PM	
	Folder	02 - Meetings	0 Items	06/20/2018 1:35 PM	
	Envelope	03 - Correspondence	0 Items	06/20/2018 1:35 PM	
	Folder	04 - Onsite Reports	0 Items	06/20/2018 1:35 PM	
	Folder	05 - Opportunities	1 Item	06/20/2018 1:35 PM	
	Folder	06 - Sales Quotations	0 Items	06/20/2018 1:35 PM	
	Folder	07 - Sales Contracts	0 Items	06/20/2018 1:35 PM	
	Folder	08 - Sales Orders	0 Items	06/20/2018 1:35 PM	
	Folder	09 - Deliveries	0 Items	06/20/2018 1:35 PM	
	Folder	10 - Support Cases	0 Items	06/20/2018 1:35 PM	
	Folder	11 - Invoices	0 Items	06/20/2018 1:35 PM	

Documents in Salesforce



Salesforce Opportunity Page: Global Trade AG - P100 Upgrade

Account Information:

Account Name	Close Date	Amount	Opportunity Owner
Global Trade AG	9/17/2017	\$24,750.00	Phyllis Lindstro...

Opportunity Stages: Value Proposition > Id. Decision Ma... > Perception Ana... > Proposal/Price ... > Negotiation/Re... > Closed

Workspace:

Type	Name
01 - Qualification Documents	
02 - Technical Documents	
03 - Meetings	
04 - Correspondence	
05 - Products	
06 - Sales Quotations	
07 - Sales Orders	

7 items

Products (1):

P-100	Quantity: 11.00
	Sales Price: \$2,500.00
	Date:

[View All](#)

Quotes (2):

00000044	Quote Name: new quote
	Syncing: ☐
	Expiration Date: 7/10/2018
00000002	Quote Name: Pump Precision Quote Global Trade
	Syncing: ☐
	Expiration Date: 12/15/2017

[View All](#)

Documents in Dynamics 365

Dynamics 365 Sales Opportunities > 10 kW Wind Turbine

NEW CLOSE AS WON CLOSE AS LOST RECALCULATE OPPORTUN... CONVERT TO WORK ORDER FORM PROCESS ASSIGN EMAIL A LINK

OPPORTUNITY 10 kW Wind Turbine

Est. Close Date: 1/3/2018 Est. Revenue: \$60,000.00 Status: In Progress

Qualify (Active for 12 days, 16 hours) **Propose** **Contract** **Close**

✓ Identify Contact	Mike Smith	✓ Estimated Budget	\$100,000.00	✓ Capture Summary	Wind Turbine
✓ Identify Account*	Leading Side Energy Corp	✓ Purchase Process	Individual		
✓ Purchase Timeframe	This Quarter	✓ Identify Decision Maker	completed		

Opportunity Sales Process (Active for 12 days)

Summary

Topic*	10 kW Wind Turbine
Contact	Mike Smith
Account	Leading Side Energy Corporation
Purchase Timeframe	This Quarter
Currency*	US Dollar
Budget Amount	\$100,000.00
Content Server Id	194986
Purchase Process	Individual
Description	Wind Turbine

Current Situation: --

Customer Need: --

Proposed Solution: Open

Refresh workspace Open in Content Suite

10 kW Wind Turbine (1b41ec74-88a0-e711-80e4-3863bb34b7d0)

Type	Name	
Folder	01 - Meetings	
Folder	02 - Correspondence	
Folder	03 - Contracts & Business Documents	
Folder	04 - Technical Material	
Folder	05 - Quotes	
Folder	Accounts	

6 items

STAKEHOLDERS

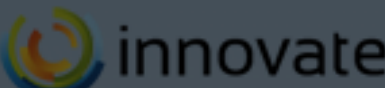
POSTS ACTIVITIES NOTES

Enter post here

All posts Auto posts User posts

10 kW Wind Turbine
Opportunity: Created by Richard House t
Energy Corporation.
On 10 kW Wind Turbine's wall
9/23/2017 7:56 PM

Documents in SuccessFactors

 Home  Home 

Search for actions or people     Tessa Walker (twalker) 

Home Ask HR

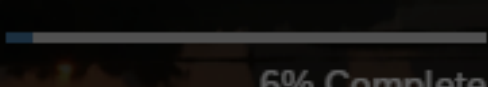
To-Do

Finish

Extern

Inbox

My In

My Profile 

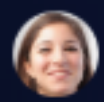
Vacation days

Open Jobs

Activate your device

Support

Employee Workspaces

 102075 Pauline Fournier 

Overview Documents Dossier View **Reports** Related

 Reports

2 Documents you added

4 Missing Documents

1 Outdated documents

8 Last 10 added documents

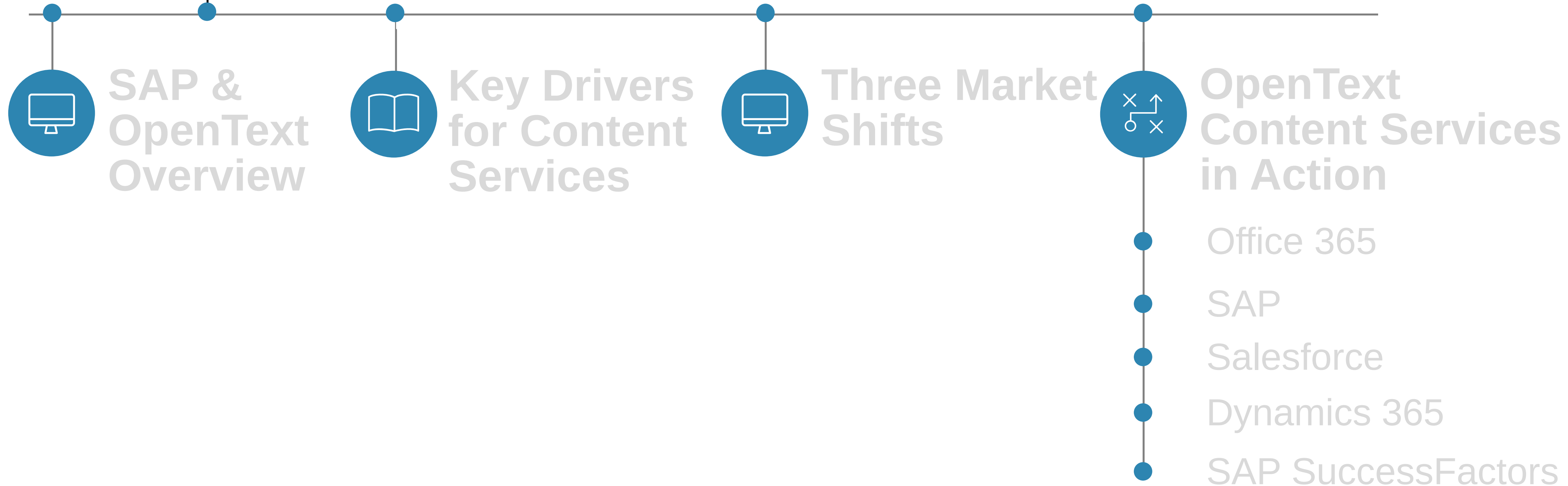
Document Type  	Location
Location Change	030.020 Localization/Relo...
Medical Insurance	020.020 Medical Check
Social Insurance/Identification Number	050.010 Social Security
Work Permit/Eligibility/Visa	030.010 Employment Cont...

4 items

Close



Agenda



Customer Example: Leading U.S. Petroleum Refiner



“OpenText Extended ECM for Engineering and SAP helps ensure that our operations and maintenance teams can rely on the accuracy of all of the data in our systems, and that they can find it in a timely manner, which has greatly reduced the risk of safety issues and improved productivity.”

Challenge

- Tight six-month deadline to migrate acquired refinery's data and documents, with minimal disruption to business and operations
- Migrate and control 3 million documents and 800,000 engineering drawings
- Engineering information system must integrate with the company's existing SAP systems (PM and Finance to start)
- Employees reported wasting days hunting through multiple systems to track down the correct version of a critical operations document.

Solution

- Implemented xECM for Engineering in the OpenText cloud to control engineering and asset information.
- Migrated 3M documents including 800K drawings into this solution
- Leveraged productized xECM integration into SAP PM

Value

- OpenText's cloud-based solution allowed them to avoid a time-consuming, resource-intensive deployment, while delivering savings, agility, and availability.
- Enjoyed enhanced user engagement and productivity. Employees can now quickly and easily access up-to-date ECM content within the SAP business applications they typically use, such as Plant Maintenance.
- They have also been impressed with the responsiveness and expertise of the OpenText cloud team, who have leveraged their deep knowledge of the customer's hosted implementation to quickly resolve the issues that they have reported.
- Mitigating legal, regulatory, and safety risks marks another critical benefit of the solution.

New Business Models for Maintenance Services

Example: KUKA (EMEA)



Thanks to the fulltext search, I can find contracts whenever I need them - in 30 seconds at most, rather than the 30 minutes it used to take before the OpenText solution was introduced.

Sabine Knecht
Head of Indirect Material KUKA
Roboter GmbH

KUKA

Consolidate Content Platforms

KUKA one of the world's leading suppliers of intelligent automation solutions has decided to make Extended ECM their enterprise content platform to manage supplier contracts, streamline sales with CRM-integrated content service, and to connect their SAP ERP system, too.

Improve Efficiency

Requestors and buyers share the same information and can easily access any procurement related content like correspondence with suppliers, product collaterals, or specifications.

360 degree customer insight

Based on Salesforce, SAP, and OpenText Extended ECM KUKA offers a complete view of all customer related transactions, activities and their connected documentation.



Customer and Engine File

Example in Automotive: MAN Diesel & Turbo



The seamless integration of the OpenText Solution simplifies information access and accelerates business processes at MAN Diesel & Turbo.

Achim Wilke
Solution Architect MAN Diesel & Turbo



MAN Diesel & Turbo

Increase Agility

To improve document handling, retrieval, and collaboration in document-centered business processes MAN is implementing OpenText as a global archiving and records management platform (GARM) for SAP® and Sharepoint®.

Efficiency and Compliance in Aftersales

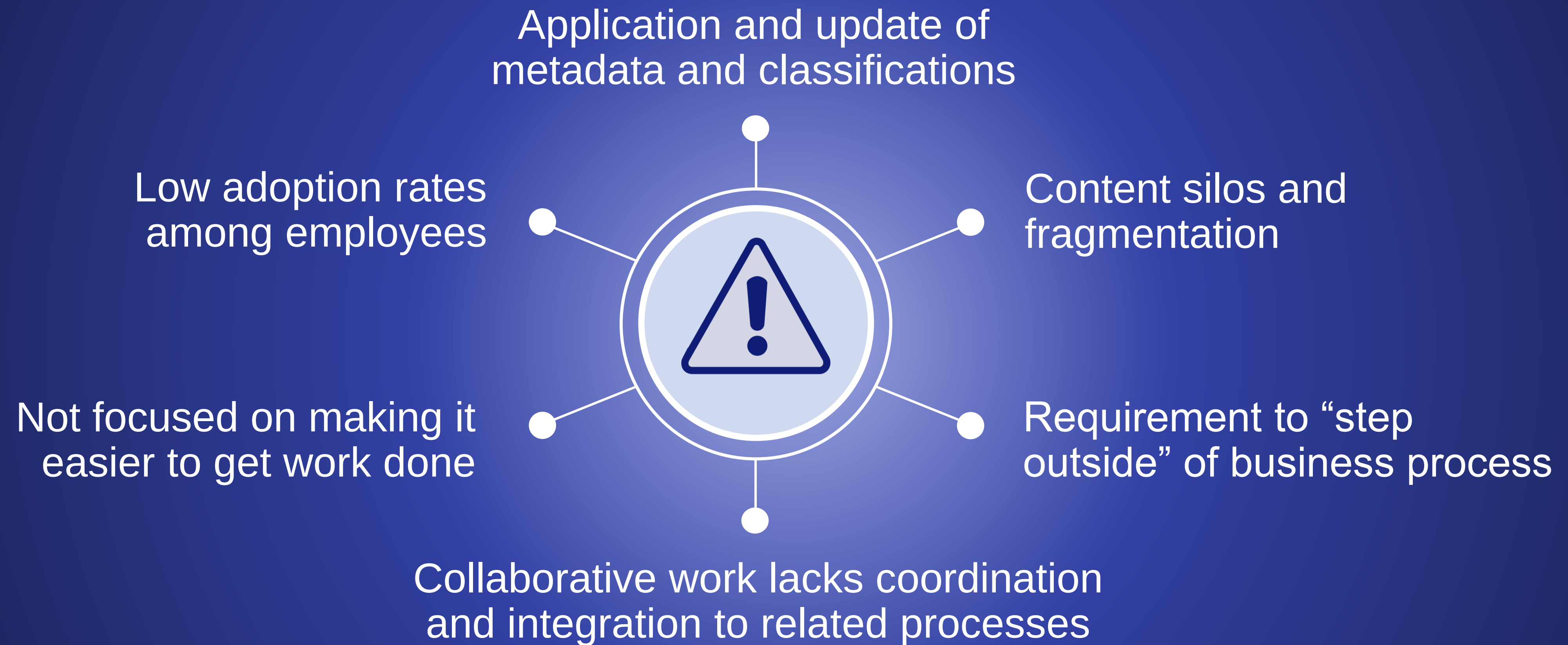
The linkage of all documentation (from sales, engineering, quality assurance, etc.) in one file provides a complete and compliant 360° view of the customer's and engine's history. The solution reduces cycle time in customer correspondence, saves costs, and results in competitive advantage for the services business.

Standardize Operations worldwide

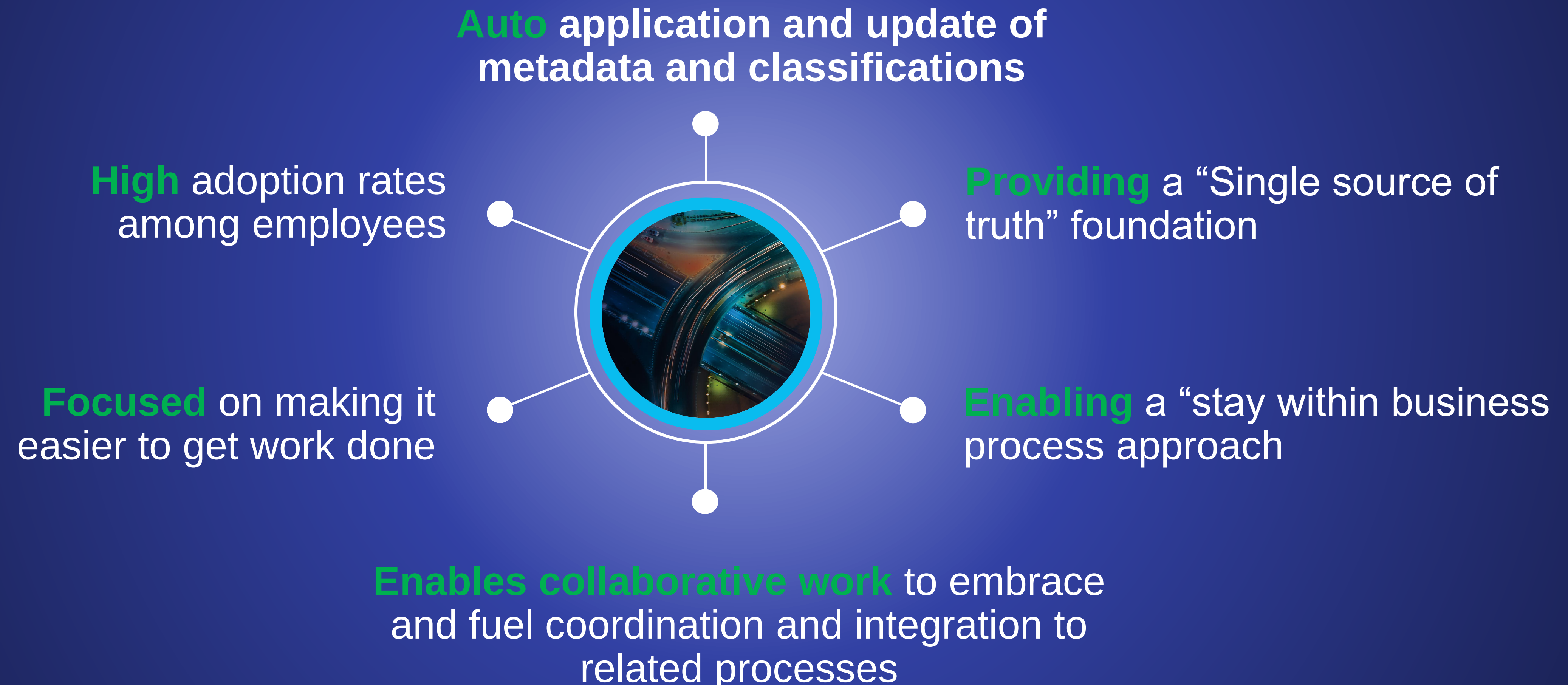
Corporate records management guidelines are harmonized worldwide based on OpenText Records Management.



Challenges faced with traditional content solutions



A Successful Strategy with OpenText Content Services

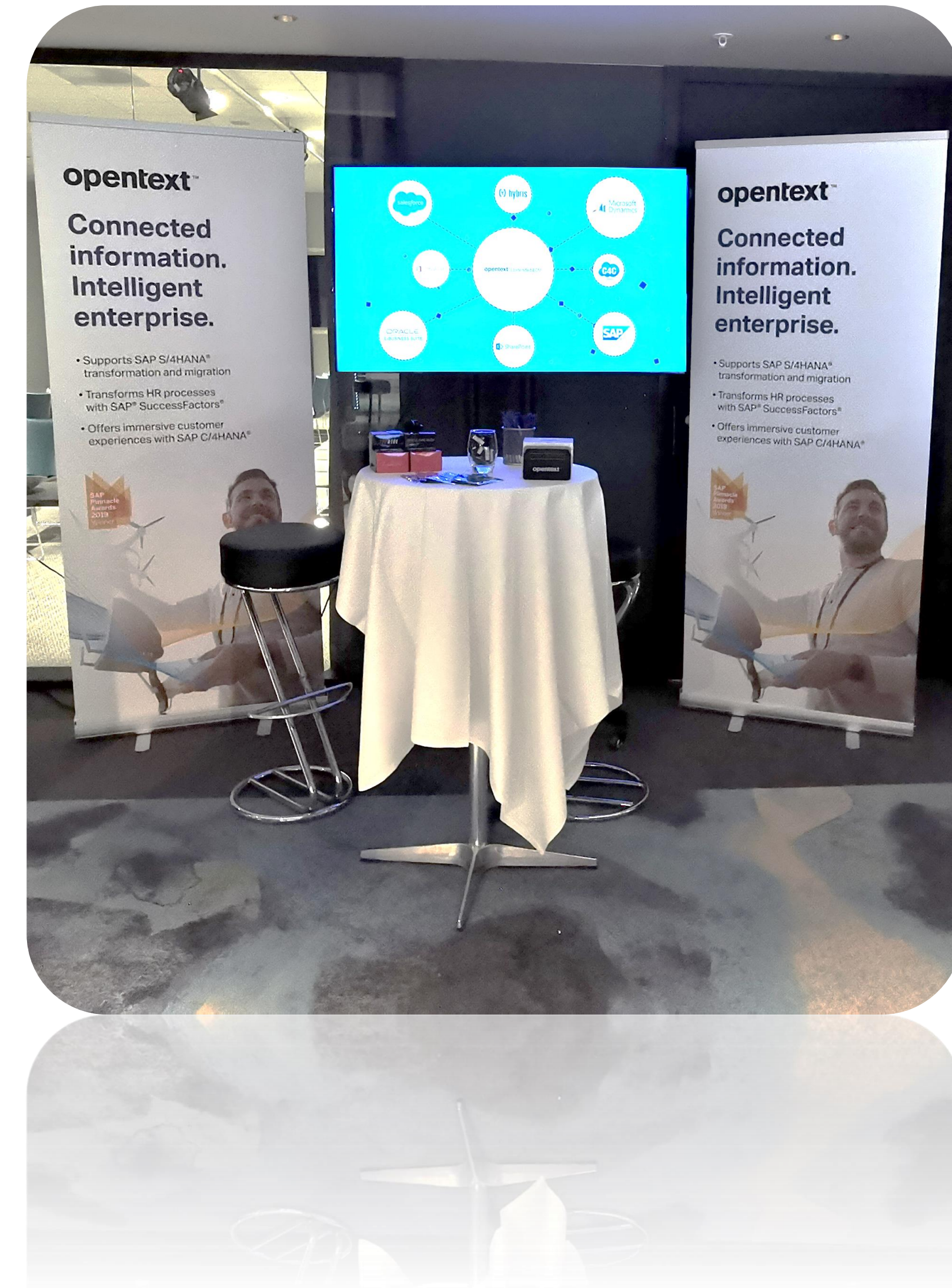


Continue the conversation!

Come talk to us!

We're nice people!

We have great giveaways!



opentext™

Thank you



twitter.com/opentext



linkedin.com/company/opentext

opentext.com



Kristoffer Rohde

Managing Principal Solutions Consultant

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