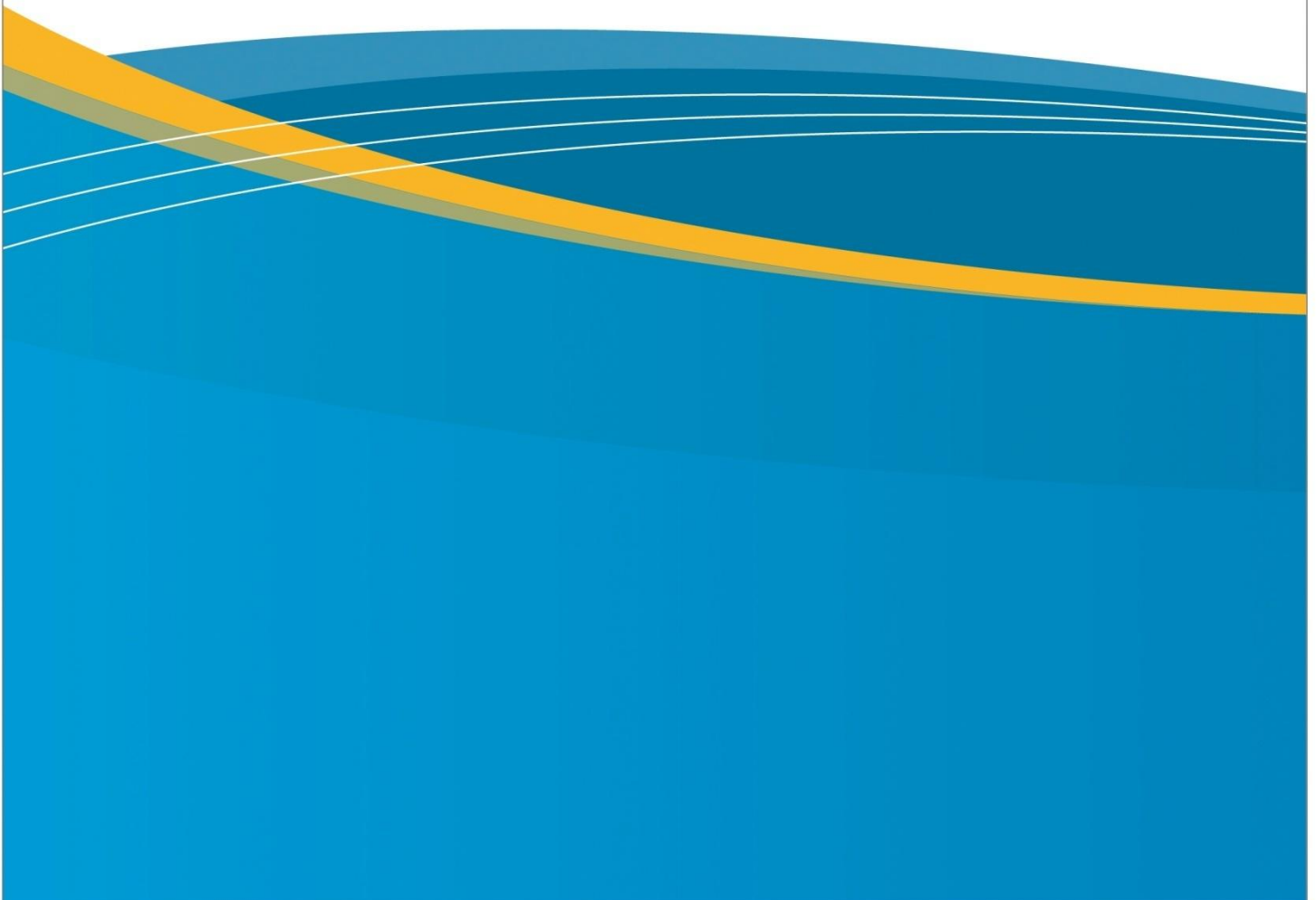


OPENTEXT

The Content Experts™

- Practical & Prudent Data Integration: A Trusted Advisor Approach



Contents

Introduction	2
A Business Pain Needs a Solution, Not a Product	3
Matching Solutions to Problems	4
Walk Before You Run	5
A ‘Reliable Partner’ is a Recognized Success Factor, not just a Cliché.....	6
When You Talk the Partnership Talk, You have to Walk the Walk.....	6
Develop Best Practices First – Then Look at an Enterprise Roll-Out.....	7
Highly Complex Project Requires a Competent Team and Capable Product	8
What Else Can I Do?	9
Blazing New Trails for Others to Follow	9
Integrating Heterogeneous Data Sources to Leverage IT Investments.....	10
Developing a Unified View of Information across the Enterprise.....	10
Conclusion	11

While every attempt has been made to ensure the accuracy and completeness of the information in this document, some typographical or technical errors may exist.

The Open Text Connectivity Solutions Group, cannot accept responsibility for customer losses resulting from the use of this document. In addition, the information contained herein is subject to change without notice.

This document contains proprietary information that is protected by copyright and may not be photocopied, reproduced, or translated, in whole or in part, without prior written consent from Open Text.

This edition published October 2009

To add multiple images to a document, simply copy the table above and paste it wherever you want to add an image. The Figure number will automatically update itself. You can delete the sample image above and replace it with the specific image you want to insert.

Introduction

The market for data integration tools has been evolving as the complexity, volume, and frequency of data exchange increases. The traditional concentration on the extract, transform, load (ETL) method has grown into a broader focus on data integration (DI) with organizations looking for solutions that can consolidate data from various systems in order to provide on-demand, near real time, and actionable business information. As organizations strive to develop more agile business models to survive in a competitive marketplace, this focus will grow ever sharper.

Data integration tools provide a foundation for corporations that aspire to be more nimble, competitive, and adaptive to quickly to changing market conditions. While ETL tools were originally developed to help move and transform data from one system or format to another, business users began asking for better access to data to improve decision making. Increased demand for more complex data mart and data warehousing projects, with diverse sources of information, delivered powerful decision-support platforms that integrated information from a host of enterprise applications.

As data sources multiply and increase in complexity, and businesses continue to seek ways to consolidate and share information across the enterprise in near real time and as a “Single Version of the Truth” (SVOT), the difficulty of integrating all of this data becomes evident. Yet for many companies that use manual processes, especially small- to mid-size enterprises, the potential gains in efficiency, accuracy, and timeliness through automation outweigh integration concerns.

Data accumulated by disparate business systems is hampered by artificial boundaries such as technologies and business processes that create obstacles to building a truly complete view of information. Users do not want to spend valuable time integrating this information, or second guessing the accuracy of the data. They would much rather spend the time making business-critical decisions based on the information.

It is apparent that the underlying business drivers for DI projects turn out to be quite common across many companies. These drivers include, but are not limited to, the need to:

- improve time to market,
- build an agile business model with the capacity to change along with the environment,
- streamline business processes,
- deliver near real time, actionable information to all decision-makers,
- reduce dissatisfaction with accurate information,

- develop a single view of the information presented in relevant and meaningful context (or SVOT), and
- institute transparency for all participants of the business process.

For more than a decade, Open Text, has been successfully delivering data integration solutions to hundreds of companies across the globe, from financial institutions to manufacturers, education institutions to pharmaceutical research firms, and even casinos. All of these enterprises will attest that Open Text's Data Integration Solution is the solution of choice for data integration. This document intends to show the value that the Open Text Integration Center (OTIC) offers its users, drawing on scenarios that demonstrate its significance.

A Business Pain Needs a Solution, Not a Product

The diversity of business problems that customers need to address has spurred a wide range of available solutions in the marketplace; from exceedingly simple, cut-rate, and functionally limited products to complex, expensive, and very powerful enterprise-level solutions. Consumers have been left asking, "Which solution is the ideal choice?" It is a difficult question for any organization to answer, but the typical way to come to an agreed upon solution is to short list the options before delving deeply. Some short lists are based on brand recognition, assuming that well known companies *must* have appropriate solutions. Other short lists are based on specific feature requirements, others on budgetary concerns. But do any of these approaches provide you with the correct options required to address your particular business problems?

Unfortunately, the least expensive, or open source products, provide little in the way of flexible, scalable solutions. Maintainability, as well as support, can be difficult acquisitions. In contrast, more expensive solutions are often implemented on a grand scale in order to provide an adequate return, but this adds a greater element of risk to the total cost of ownership. According to market intelligence source IDC, up to 60% of data integration, ETL, and data warehousing projects do not deliver the desired results.

Customers often feel as though they have to fit their business problem strictly into the parameters offered by the vendor's product and often neglect important considerations when evaluating a solution. Fundamentally, a solution should be:

- flexible enough to meet their unique requirements,
- delivered with a depth of experience in providing customized solutions that match customer's business problem,
- supported by technically knowledgeable professional services, and
- simple to implement but versatile enough to handle future needs and complexities.

Without a proper vendor-partner relationship, the goals of a project can be compromised. Though no vendor sets out to deliver less than perfect results, the approach taken to a problem, right from its starting point, can unwittingly cause the evaluation process and ultimately the solution to fail.

Open Text, is one vendor that is very well-positioned to serve as a partner for small and medium sized companies, or larger enterprises that prefer to take a practical and prudent approach to rolling out DI solutions across their organization. Open Text focuses on understanding the overall needs of the organization to ensure the strategic alignment of technologies and processes with those of the entire organization. Open Text's advantage comes from appreciating that customers have a lot invested in DI projects, from scarce fiscal and human resources to their own personal reputations.

Because countless decisions must be made in terms of technology, solutions, budgets, and other diverse requirements, it is crucial to have a trusted advisor with an informed perspective involved in the project. A vendor must understand relationship management, taking the time to be a trusted advisor and listen to the problem before trying to solve it. It is also important to work with a vendor that would rather scale the project to a level manageable for your organization, demonstrating their understanding that tactical implementations, rolled out in phases, are often the most practical course of action.

Matching Solutions to Problems

There are several reasons why OTIC should be strongly considered for a data integration project. Firstly, it provides a fully-featured and wholly supported solution at a reasonable price. It is simple to use, with a graphical interface that allows even the technically disinclined to develop and deploy the solution. It provides a powerful native language scripting utility so that functionality can be built and extended, as required.

Secondly, Open Text's approach to the management of DI projects is to focus on a client's requirements rather than dictate solutions. Open Text's success comes from understanding the project goals and then deploying a solution tailored to those needs. Deep experience in DI and ETL is enhanced by a team of consultants that have worked on hundreds of deployments across the globe.

Open Text's comprehensive approach, above all else, is the key to their continued success in delivering DI solutions for customers. For small and medium sized companies, this approach is ideal for delivering right-sized projects that make sense from both human and fiscal capital angles. As you will see from forthcoming examples, Open Text derives pride from both the end results and the technical versatility of the Integration Center.

For larger companies, Open Text's partnership approach offers a perfect opportunity to take a departmental or project-based method to deploying DI. While some organizations would rather roll out an enterprise-wide solution immediately, there are

tremendous costs and complexities involved with this approach. It is necessary to get corporate sponsorship, train users, ensure that legacy systems are phased out, and navigate organizational minefields. It may seem like nirvana at the start, but it can quickly turn into misery. As a result, many large organizations have taken a phased approach, deploying the solution in one department and then, once its value has been demonstrated, extending the value by bringing new projects on line. Open Text's belief in the principle that right-sizing a project is a key to success does not change based on a company's ability to pay more or less for the solution. No matter what the size of the enterprise, Open Text acts as a dedicated partner to recommend a solution that best fits the needs of the client.

Lastly, from a technical standpoint, the Open Text Integration Center offers several advantages¹. OTIC is completely platform and database neutral, which allows users to develop generic business rules without binding them to any specific environment. It includes a comprehensive scheduling facility that is often cited by customers as a fundamental competitive differentiator. Also, the natural language scripting facility provides an uncomplicated approach to develop instructions on how to treat data coming in from various business systems.

Walk Before You Run

There are many reasons for a company to embark on a data integration project. Typical data integration scenarios include, but are not limited to:

- building a data mart or data warehouse to support a business intelligence project,
- consolidating or migrating document libraries,
- extending the useful life of legacy systems,
- replicating and distributing data to multiple systems, and
- migrating data to new versions of business software.

Whatever the reason, Open Text DI experts often recommend a proven methodology in a phased deployment, aligning the best practices to the organization's enterprise information management strategies. This approach limits risk, controls costs, and shortens the learning curve for future expansions. It also limits the possibility of small roadblocks, which can be more easily addressed during the first implementation, from causing big headaches across the enterprise. The phased approach also allows the customer to build a partnership with Open Text for future success. Open Text is able to deeply understand an organization's business processes and requirements,

¹ For a more detailed technical look at Genio please refer to "Genio Suite™: A technical Overview," Open Text, 2007.

leveraging experience to provide a comprehensive solution from initial contact to production and ongoing through maintenance and support.

The following example examines how transport and logistics company Kühne & Nagel was able to simplify its enterprise roll-out using the Integration Center by working with Open Text consultants. Open Text's team recommended a phased approach, adding a total of twelve departments in stages over the course of the first year. The phased approach allowed Kühne & Nagel to shorten the learning curve for each new deployment while mitigating risk to the company in case of any glitches along the way.

A 'Reliable Partner' is a Recognized Success Factor, not just a Cliché

Kühne & Nagel², one of the world's leading transport and logistics companies, focuses on making sure that clients receive their goods in the fastest and most reliable way. Concentrated on customer requirements and efficient business transactions, Kühne & Nagel launched the "KN Data Pool" project in order to consolidate operations and client data into a central database. The integrated data had to be accessible to applications that require a comprehensive, global view, such as SCM, BI, and CRM. A solution using OTIC ensured optimization of data flow and granted customers more transparency about the current status of orders. More importantly, by selecting the Integration Center, Kühne & Nagel found a partner in Open Text that was well-aligned to its own philosophy on customer relations.

"The client wants a close working relationship with their service provider. With Open Text, we created a foundation that will allow us to continue to realize this strategy well into the future." –Jens Gorman, Manager Data Pool, Kühne & Nagel Corporate IT Center

With the Open Text Integration Center, Kühne & Nagel have a solution that integrates critical company data in all Decision Support and Enterprise Systems. In one year, a total of twelve projects were converted in the Data Pool area including the import of airfreight data, customer purchase orders, accounts receivable, cost and sales data, ocean freight data, surface transportation and warehouse projects, as well as several supply chain management and business intelligence projects.

When You Talk the Partnership Talk, You have to Walk the Walk

Trimac is a premier bulk hauling and trucking company in North America. With four operating divisions, Trimac responds to most service demands in North America's key bulk commodity shipping locations and traffic lanes. Trimac users were not able to efficiently access corporate data critical for the reporting needs without having to contact the IS department. The problem affected the users' ability to perform key analysis such as Trip Standards Analysis, which examines factors like profitability by

² For more on this project please read the Kühne & Nagel Customer Success Story

customer or equipment by examining variables such as load times, loaded miles traveled, and gross vehicle weight. Financial reporting in areas such as accounts payable and accounts receivable was also affected.

Trimac was looking for a cost-effective, universal data exchange solution that would allow centralized data acquisition, transformation, and exchange. The Open Text Integration Center was chosen from among a wide field of options because of Open Text's service excellence and the cost-effectiveness of its proposed solution. Open Text viewed the goals of Trimac as our own and worked in partnership with Trimac in order to achieve them.

"When Open Text came to town we were really impressed with the fact that they came ready to play and wanted to do business with us." –Martin Zardecki, Information Services Team Lead, Infrastructure, Trimac

Now the Integration Center helps populate Trimac's data warehouse with clean, accurate data from various financial and human resources applications. This dramatically simplified internal systems and ensured consistency of data. "Everyone is impressed with the speed and performance," says Zardecki. Today, the Open Text Integration Center is an important component of Trimac's data warehousing strategy enabling the IT professionals to realize data exchange between systems such as Peoplesoft, Cognos and Oracle.

Develop Best Practices First – Then Look at an Enterprise Roll-Out

In partnership with Open Text, Nacional Financiera looked to implement a strategic DI platform and then use the best practices learned to easily replicate the solution across the organization.

Nacional Financiera (NAFIN)³ is a leading banking institution in Latin America. In order to maintain its preeminent position as the principal Mexican provider of financing for small and medium-sized business, NAFIN undertook a modernization program to improve internal processes and provide better customer service. The project was started in the risk management department with the consolidation of 17 distinct systems containing statistical data used in developing risk management methodologies. The Open Text Integration Center was chosen for the data integration requirements of the modernization program.

The first step toward resolving this problem was the creation of a single database to contain all the data on the bank's financial operations. The risk management system could then extract the data from this system to run analysis and model the data. To achieve this goal, the bank's MIS department decided to create a data warehouse to collect and store the data. Special attention was paid to training during the entire project to ensure the success of the venture. The initial team had the opportunity to

³ For more on this project please read the NAFIN Customer Success Story

develop best practices that could be applied at later stages in the implementation and shared throughout the institution.

NAFIN now has a strategic solution that supports new projects, increases productivity and consistency, reduces development and maintenance times and costs, and supports the timely analysis of business-critical data.

“Having this technology as the backbone for information acquisition and delivery has enabled us to obtain data in a timely, consistent, and clean fashion, instead of searching through an endless number of sources and systems.” –Francisco Parra, Director, Risk Management Department

Highly Complex Project Requires a Competent Team and Capable Product

Our fourth example illustrates the value of a methodical approach to DI and helps to understand the impacts that a data warehousing project may have on other aspects of the business as consideration is given to project adjustments. It is precisely this type of project—with many hidden data interdependencies and little preceding in-house experience with the data—that requires a reliable and knowledgeable partner. Only by comprehending the partner’s needs could Open Text succeed in delivering a smoothly functioning solution.

Headquartered in Des Moines, Iowa, Meredith Corporation⁴ is one of America’s most trusted companies. To improve its marketing efforts, the company decided to bring the formerly outsourced Customer Data Base (CDB) in-house. At the beginning of the data warehouse project, Meredith had no IT infrastructure to store the CDB or to handle the complex ETL process.

Meredith chose Teradata for its enterprise data warehouse and customer relationship management (CRM) applications. The Integration Center was selected because of its tight integration with Teradata and Open Text’s experience with delivering the requirements of complex data integration projects, understanding how complex data interdependencies can unexpectedly affect business processes.

The data Meredith was consolidating in its enterprise data warehouse came from several internal and external sources. The Open Text integration team, working closely with the business unit, created an original data model for the new Teradata database.

“At the beginning of the project we didn’t know much about the externally outsourced database systems or their data structures. Our new data model changed numerous times to meet new business needs. As you can imagine, if we didn’t have impact analysis capabilities, we would be in trouble—we wouldn’t be able to identify those processes affected through the rest of the system by doing something as simple as changing one

⁴ For more on this project please read the Meredith Corporation Customer Success Story

table. The impact analysis capabilities of the Open Text Integration Center were significant for us.” --Jose Lora, Senior Systems Architect, Meredith Corporation

What Else Can I Do?

Once the value of Integration Center and the best practices for deploying a DI tool have been realized, there are few limits on achievement. The next few stories show data integration solutions in use across the enterprise in a variety of industries and scenarios. The first story concerns the City of London Police, an example of an organization that was so impressed with its initial experience with the Open Text Data Integration solution that it decided to proceed to additional projects. This example also illustrates the reproducibility of results in similar organizations.

Blazing New Trails for Others to Follow

City of London Police⁵ uses the Open Text Integration Center to create data warehouses (DW) and operational data stores (ODS) to support front line policing in the metropolis of London, England. The police force’s first success came with using OTIC to extract data from their HR system. The system was created to drive police reform based on high data integrity and accuracy and replaced a myriad of legacy systems that had caused data duplication and inconsistencies in information. The force’s positive experience with the Open Text team led to a new project developing the City of London Collaborative Warehouse that was deployed alongside the operational data store. This Collaborative Warehouse is derived from the operational data store using the Integration Center extracts and provides essential staff performance monitoring and intelligence capabilities via a Business Objects front end.

The City of London Police made their data store available on the Criminal Justice System online portal to improve the effectiveness of the system in bringing offenses to justice, accomplishing one of their main goals. The project has drawn interest from a number of other police forces seeking to reuse the operational data store schema, the Integration Center code, and extraction logic. City of London were also the first force to write their own extracts against the Custody and Case Preparation System, which enables the police service and its criminal justice partners to efficiently and effectively manage the end-to-end business process from custody to completed electronic case file. The City of London Police recognizes the benefits that collaboration can bring and are always willing to share code and expertise within the police community. This collaboration is set to become a long term endeavour, further reducing the timescales required to get both an operational data store up and running in forces and the learning curve when writing interfaces against proprietary system.

⁵ For more on this project please read the City of London Police Customer Success Story

“The Open Text Data Integration Solution has shown itself as more than capable of meeting the requirements, allowing the City of London Police to continue to press for further return on investment.” --Simon Howe, IMPACT Team Leader, City of London Police

Integrating Heterogeneous Data Sources to Leverage IT Investments

Chronopost International⁶, a leading expert in express shipping, has seen constant growth since it was first founded. The firm’s success is built on anticipating the future and responding to it with investment and innovation. Chronopost operates two data marts, each with a well-defined role. One data mart provides an aggregate view of the distribution network, while the other is focused on quality measurements (deadline met, error handling, quality reports, and so forth). The objective is to send an end user all information about the service provided within a specified time frame.

Chronopost chose the Open Text Integration Center because of its ability to provide bulk loading on Teradata and for its powerful procedural language. Indeed, according to Michel Croissant, Decision-Support Manager at Chronopost, “query generation by the engine has optimized interface development time gains.” This feature is even more important for Chronopost, which must deal with highly heterogeneous platforms. Because the Integration Center handles all the connectivity requirements, Chronopost doesn’t have to worry about dealing with native code. And the transfer to UNIX was problem-free: Integration Center management, in a distributed architecture, supported development on Windows NT[®] and processing on UNIX.

Daily replenishment of the production platform optimizes updating of business management and corporate client contract changes, which are managed by cross-referencing and linking. The Integration Center subsequently feeds the data marts. Here, Chronopost takes advantage of the aggregate management functions and management rules available in the Integration Center.

“Data loading and processing by the Open Text Integration Center guarantee a short turnaround between data being available for loading into the data marts and its display on-screen for users, even for data from the previous day,” —Michel Croissant, Decision-Support Manager, Chronopost

Developing a Unified View of Information across the Enterprise

Ranbaxy Laboratories Ltd.⁷ is the largest pharmaceutical company in India and is among the top 10 companies in the international generic medicines space. Ranbaxy’s technology infrastructure is a mix of best-of-breed technologies and getting a grasp on enterprise-wide data was similar to guessing what is stored in a

⁶ For more on this project please read the Chronopost Customer Success Story

⁷ For more on this project please read the Ranbaxy Customer Success Story

huge warehouse where goods have gathered haphazardly over time. To solve this problem, the senior management at Ranbaxy decided to implement an enterprise data warehouse solution to support business intelligence.

The company needed to build an enterprise-wide data warehouse architecture that would provide a unified view of product information. Ranbaxy found a winning solution in the Open Text Integration Center and Open Text Business Intelligence (formally Hummingbird BI), implemented with assistance from Open Text Data Integration Experts. Open Text helped Ranbaxy install a system that would open the door to a wide range of analytical processes, which would not only allow Ranbaxy to see what it had, but also predict what it needed.

“The consolidation of enterprise-data, including financial, sales, and product information, empowers us to make faster and better-informed decisions and enables the creation of a real-time extended enterprise.” --Vijay Sethi, Director, Business Solutions, Ranbaxy Laboratories Ltd.

Conclusion

The cases covered in this paper exhibit a wide range of customers, industries, business objectives, and specific parameters for Data Integration. In each case the customer found Open Text to be a trusted partner and advisor in DI projects and technology. These examples are by no means exhaustive and we encourage you to read others on the Open Text Web site about a host of other industries, from universities and governments to casinos and banks. Each shows how an organization was able to match solutions to business problems by engaging a vendor with the right experience and know-how to understand and implement a viable, rewarding outcome.

An organization with over 46,000 successful software deployments world-wide Open Text has more than a decade of experience in delivering solutions for DI and ETL projects. This large customer base provides Open Text with the resources to continue expanding the Data Integration strategy to meet future challenges in a multitude of industries.

OPEN TEXT

The Content Experts™

Sales	Americas	Europe	Asia/Pacific	
www.opentext.com info@opentext.com North America Sales 1-800-499-6544 International Sales +800-4996-5440	United States 100 Tri-State Int'l Parkway Lincolnshire, IL USA 60069 Phone: 847-267-9330 Fax: 847-267-9332	Germany Technopark 2 Werner-von-Siemens-Ring 20 D-85630 Grasbrunn Germany Phone: +49 89 4629 0 Fax: +49 89 4629 1199	United Kingdom Grosvenor House Horseshoe Crescent Beaconsfield, Buckinghamshire United Kingdom HP9 1LJ Phone: +44 1494 679700 Fax: +44 1494 679707	Australia Level 23 100 Miller Street North Sydney NSW 2060 Australia Phone: +61-2-9026-3400 Fax: +61-2-9026-3455

If you are an Open Text partner or customer, visit online.opentext.com for more information about this and other Open Text solutions.

Open Text is a publicly traded company on the NASDAQ (OTEX) and the TSX (OTC).

© Copyright 2008 by Open Text Corporation. Open Text, The Content Experts, and Livelink ECM are trademarks or registered trademarks of Open Text Corporation. All other trademarks or registered trademarks are the property of their respective owners. All rights reserved.