

■ Product Overview

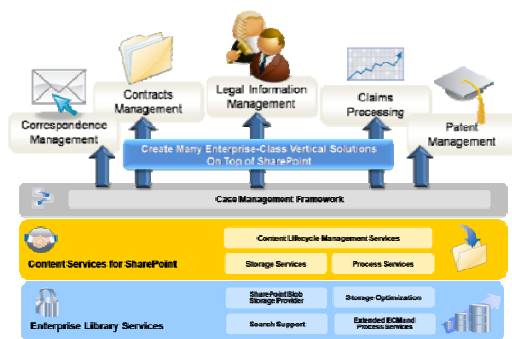
Open Text Case Management Framework for Microsoft SharePoint

Create Enterprise-Class Case Management Solutions That Take Full Advantage of Your Microsoft Office SharePoint Server 2007 Platform

One of the major cost drivers for companies when building applications on top of Microsoft® Office SharePoint® Server 2007 is the development time required to build applications, and the implementation effort it takes to manage large-scale roll-outs in a controlled fashion. By extending core functionality and providing a secure and easy-to-use development framework, Open Text Case Management Framework for Microsoft® SharePoint® solves the time-to-market demands for customers and provides a competitive advantage for those that use this framework to build and roll out their ECM solutions on top of SharePoint.

“Open Text is leveraging the SharePoint platform to make the end user experience seamless in getting that relevant case data and content they need. There’s a layer of usability and scalability across the enterprise that hasn’t been seen before.”

Evan Richman ,
Microsoft ECM Lead



Open Text Case Management Framework for Microsoft SharePoint is a foundation for solving various business scenarios in many industries within the familiar SharePoint interface.

The need for case management solutions exists in many different industries and government organizations. In a large, distributed organization, case management requires elements such as distributed collaboration, support for multiple levels of data sensitivity, enforcing strict security protocols, and the integration of disparate information governance systems in both inter- and intra-agency activities. While the term “case management” may have widely different meanings to case workers in these different organizations, there are a number of similarities across industries.

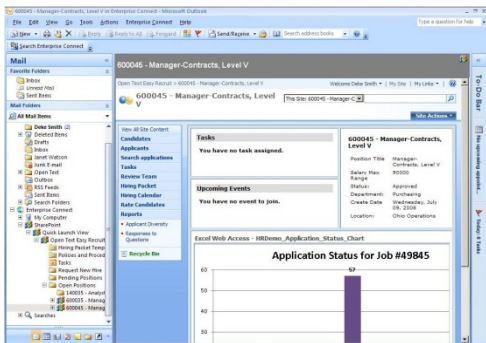
Case management is a unique approach to managing relations between documents, records, people and processes.

In essence, the “case” is a “living thing” bound by the business rules of the organization, and is managed through a “case lifecycle” for business and compliance reasons. In most case management applications, case lifecycle management involves records retention and long-term archiving, and classifying the case information. The ultimate disposal of the complete case is determined based on tracking and auditing mechanisms throughout the complete case lifecycle. Large international organizations increasingly need a common case management framework as a foundation for solving problems in various areas of business, such as correspondence management, contracts management, claims processing in financial services, patent management in manufacturing, and legal case management in law firms.

Platform extensions and ease of deployment – Productized infrastructure extensions

By enabling automatic creation of SharePoint sites using a defined structure with built-in archival and disposal schedules, deployment of large numbers of SharePoint sites becomes easy. Sites are created through forms and workflow, or automatically through data feeds. Deployed sites are automatically extended with underlying world-class Open Text archival and records management / classification mechanisms. Information Workers can take advantage of all SharePoint functionality, yet the metadata creation, audit abilities and long term infrastructure considerations are built in through Open Text extensions to the SharePoint infrastructure. Infrastructure enhancements provided through the Case Management Framework include:

- A powerful application development framework
- Robust SDK, customization guide and sample case solutions
- Archival and records management extensions
- Metadata inheritance down to the document level
- Audit ability and reporting extensions



Open Text Enterprise Connect functionality allows you to access your case application in SharePoint directly from familiar user interfaces, such as Microsoft Office Outlook and Windows Explorer.

Ease of Use for End Users – Automated Site Creation, Business Solution Database And More

A lot of time can be saved when generating SharePoint sites automatically – even more when this process can be handled by the end-user, adhering to corporate rules and regulations. Through the use of Microsoft Office Forms Server 2007, the Case Management Framework provides you with precisely this capability. To enforce compliance rules, a case’s metadata and structure can be pre-defined in a Business Solution Database. A high-level of automation through workflow and metadata operations keeps users from wasting time on entering redundant details. Through the use of subscriptions, the end user is able to see the cases he or she needs regular access to, while simple and advanced search functions facilitate finding any site that the user has permission to view. Comprehensive API, SDK and sample applications enable you to quickly create your own application with components such as integration of data from other applications (for example, through the Business Data Catalogue).

To present a 360° view of all the relevant information in one client, Open Text Case Management Framework for Microsoft SharePoint provides Open Text Enterprise Connect desktop extensibility. Bringing the easy-to-use collaborative SharePoint environment to Microsoft Outlook, Windows Explorer and Microsoft Office allows users to operate in their environment of choice at any given time. Drag-and-drop allows easy movement of documents and emails to a SharePoint folder, taking advantage of all the features built into the Case Management application. SharePoint applications can now be embedded within the Outlook or Internet Explorer desktop environment, guaranteeing end- user adoption of case applications.

Inheritance of metadata throughout all levels of the case (site) and the ability to change or add attribute and field values on-the-fly are other important features for associating content coming from different SharePoint sites, and making the heavy lifting in enterprise content management almost invisible to users.

Features

Highlighted features of Open Text Case Management Framework for Microsoft SharePoint include the following:

- Automated site creation via forms, workflow, and the Business Data Catalog (BDC)
- Metadata inheritance throughout the case (site)
- Case/site subscription
- Incorporation of implicit records classification and life cycle management
- Seamless and extensible search across active and archived cases
- Exclusionary security through ethical walls
- Automated document numbering
- Audit extensions
- Extensible components such as Power Search, Generic Web Part SDK, including customization documentation



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Get the most from your SharePoint deployment

Business productivity applications built with this framework can take full advantage of the collaborative features in Microsoft Office SharePoint Server and Microsoft Office environments. There is complete flexibility to design multiple types of case applications, and to extend these applications with automated features from Open Text Case Management Framework for Microsoft SharePoint. Open Text extensions to SharePoint enable easy development of case applications that end users will love interacting with.



Technical Specifications:

Open Text Case Management Framework for Microsoft SharePoint works with:

- Microsoft Office SharePoint Server 2007.
- Open Text Content Lifecycle Management Services for SharePoint 10.0

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