

Excellence in Project and Portfolio Management with ECM for SAP®

Linking people and processes to essential enterprise content

As an SAP customer, you understand how important your SAP applications are for driving your core business processes and processing critical transactional data. This data also plays an important role in the various projects in product development, production and operation, customer service or IT. But equally important is the enormous volume of “unstructured” content that comprises everyday communications—much of which is critical to delivering projects on time and within budget.

The fact is, unstructured content represents the vast majority of the project information produced and managed by most organizations across industries—professional services, engineering and construction, oil & gas, pharmaceuticals, high tech, and aerospace and defense. Acceptance declarations, project specifications, and change request documents are all unstructured content that play a vital role in communicating ideas and moving projects along toward successful completion.

Commonly, this unstructured content is created and shared in a collaborative context where geographically dispersed teams work together to make decisions and achieve project milestones. Unfortunately, content, whether structured or unstructured,

is increasingly stored in application silos that cannot be shared across business processes and organizational units.

Such environments also lack the standardized content management processes required for consistent records management, which poses significant challenges. For example, when developing new products, manufacturers must track engineering documents and safety data sheets for potential review by regulatory authorities. Without a consistent approach to records management, organizations expose themselves to the risk of non-compliance and higher discovery costs as employees spend time tracking the documentation required to meet project-related regulatory requirements.

SUMMARY

OpenText Extended ECM for SAP Solutions manages content more effectively, facilitates project collaboration, preserves consistency between data and documents, and supports regulatory compliance.

BUSINESS CHALLENGES

- Manage vast amounts of unstructured content to support positive project outcomes
- Effectively support the collaboration of geographically dispersed teams
- Relate unstructured content to SAP business transactions
- Constrain the proliferation of siloed content repositories
- Store and track content for regulatory compliance and transparency

BUSINESS BENEFITS

- Speed project lifecycles by instantly joining people to make decisions and move forward with project milestones
- Enhance collaboration and increase communication with project workspaces that centralize information and enable team members to work together efficiently
- Constrain the growth of content repositories and minimize IT complexity with a rationalized approach to content management
- Mitigate project risk with records management functionality that classifies and stores project content in an orderly manner and makes it accessible for compliance purposes

All of this adds up to a significant need for effective Enterprise Content Management (ECM). This is where OpenText Extended ECM for SAP Solutions can help. It is developed to manage this built-up enterprise content in a more effective manner by integrating it with SAP.

The solution explicitly associates content with the project management functionality in the SAP Enterprise Resource Planning (ERP) or SAP Portfolio and Project Management (PPM). By doing so, organizations can file and manage content according to the project structures defined in SAP. Important project documents or emails can be stored as a permanent electronic record for compliance purposes.

Continuing the project with ECM

Extended ECM for SAP Solutions empowers project managers and team members to manage both structured and unstructured content in the context of the processes and transactions supported by your SAP business applications. Fully integrated with the project management functionality in SAP ERP and SAP PPM, this application improves the information handovers that occur at the beginning and the end of a project. When a project starts, the application pulls structured SAP process information, such as project-based data, project structures, and commercial documents (project orders, contracts, and so on) from SAP and elsewhere as required. When the project is complete, a similar handover occurs in the opposite direction—with both structured and unstructured content flowing back to the relevant SAP applications. In the end, important documents such as acceptance declarations and change requests created during the project are associated with the appropriate transactions and business objects. This helps improve the ability to trace information and serves as the basis for improved compliance.

Enable collaboration and compliance in your projects

Extended ECM for SAP Solutions addresses the challenge of managing geographically dispersed teams with collaborative workspaces that allow project team members

to brainstorm, develop, share, comment on, and approve any type of unstructured content throughout the project. First, the project manager creates the project in SAP ERP or SAP PPM. Extended ECM for SAP Solutions then automatically creates a workspace that capitalizes on existing master data stored in SAP applications and resembles a filing structure that matches the project structure in SAP. From that point on, participants in the workspace can use features such as personalized project pages, discussion forums, approval workflows, follow-ups, notifications, and polls to carry out required project activities.

The workspace is essential to launching the project and monitoring its progress. Project managers can pull resumes and employee profile information into the workspace to populate the team. As the project progresses, managers can also identify key team members and connect them to the right people for quick, well-informed decision-making that helps maintain schedules.

However, many projects are not limited to only internal employees. This is why Extended ECM for SAP Solutions supports different interface approaches. Internal employees can use their standard SAP software interfaces, making it easier for them to be productive from the start. External partners can use the web interface of Extended ECM for SAP Solutions—enabling you to include users who need to be part of the overall process but who shouldn't have direct access to your SAP applications. It is also important to note that many internal users will likely benefit from the web interface because of the flexibility it provides for accessing content even when working on the other side of the firewall. Whatever the case, Extended ECM for SAP Solutions provides options that allow your project team members to work together and collaborate toward project objectives in their preferred working environment.

Access any content, anytime

Accessing multiple systems and searching independently for relevant information can result in low productivity, duplicate information, and conflicting versions of the truth. Extended ECM for SAP Solutions can help you avoid these problems with 360-degree

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visibility into any and all content associated with transactions by automatically linking each piece of unstructured information to the relevant business process, where it is appropriate. Whether it's an invoice, a contract, a resume, or a photo from an industrial accident, your project participants will be able to relate it to the appropriate SAP business objects and understand its relevance.

Integration with Microsoft® Office, Microsoft Outlook® or Microsoft SharePoint® also plays a significant role in improving access to important information. For example, a project manager can drag-and-drop an email in Outlook from the inbox to the project workspace and link it to the project, granting others access to its information.

Then, for the duration of the project, all participants can view this correspondence from either their SAP user interfaces, the web interface or the Microsoft applications. Extended ECM for SAP Solutions provides a dynamic environment for controlled and streamlined sharing of content.

With Extended ECM for SAP Solutions, it is even possible for you to access content offline. This is often a requirement for field workers—from on-site construction workers to salespeople on the road. Changes made to offline content are later synchronized when the user finds a connection. This enables workers to remain productive while still having access to the vital project information they need.

Control your content growth

A disorderly approach to content management only makes the problem of information overload worse. Fortunately, Extended ECM for SAP Solutions helps you minimize the explosion of content throughout the enterprise. First, Extended ECM for SAP Solutions never duplicates content. Rather, it creates links between structured or unstructured content through the use of metadata. This helps you simplify your IT landscape by controlling the proliferation of information repositories—all while improving content visibility and role-based access so that you can manage your projects effectively and efficiently.

The application will also allow you to control your document versions throughout the project and then archive all versions upon project completion according to the rules you define. This archiving compresses the content, eliminates duplicates, and abstracts storage management—allowing you to leverage low-cost storage devices while still making archived content accessible to end users. In the end, you can reduce content storage costs, minimize the time and energy associated with backing up your data, and optimize the performance of your production systems.

Mitigate risk and achieve compliance with improved record management

When you don't know the value of your unstructured content, where it resides, or who has access to it, you can expose your organization to legal and regulatory risks. Extended ECM for SAP Solutions mitigates these risks by applying records management classifications to content so you can control its entire lifecycle from creation to archiving and destruction. This application also allows you to configure it to implement these classifications automatically. Certified to comply with the U.S. Department of Defense Directive 5015.2 for records management, the software helps you mitigate project risk while eliminating the need for users to classify documents manually. Additionally, it helps

ensure that the classifications are performed consistently and accurately.

Increase efficiency in daily project work

Projects are instrumental in the daily working of a business—they are how things get done—and every organization wants their business to work as efficiently as possible without increasing risk. Extended ECM for SAP Solutions helps on both counts. By linking unstructured content to transactional data and enabling access to that content throughout the project, Extended ECM for SAP Solutions helps project team members use and make sense of project-relevant information. The solution also supports collaboration across organizational boundaries to easily include suppliers, subcontracts or customers. By providing full transparency about project status and document updates, team members can make better decisions more quickly. The end result is consistently better project outcomes throughout your organization.

Learn more

To learn more about how Extended ECM for SAP Solutions can help your organization manage content and improve collaboration for improved project outcomes, contact OpenText online at www.opentext.com/ecm-for-sap. ■

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NORTH AMERICA +800 499 6544 ■ UNITED STATES +1 847 267 9330 ■ GERMANY +49 89 4629-0
UNITED KINGDOM +44 0 1189 848 000 ■ AUSTRALIA +61 2 9026 3400