OPENTEXT™

OpenText™ Enterprise Content Management Migration

Migrate and consolidate systems for increased efficiency

More than two out of three organizations own three or more Integrated Document Archival and Retrieval System (IDARS) or Enterprise Content Management (ECM) systems—with one in four owning five or more. Consolidating or migrating high-volume output and images to more efficient ECM solutions can help such organizations streamline operations, reduce costs, improve information access, and simplify compliance

OpenText has experienced ECM migration consultants who have the technical expertise and field experience to conduct ECM Migrations for very large organizations, as well as in-depth knowledge of all major print stream and image formats and a wide variety of IDARS/ECM technologies. ECM Migration services from OpenText also include technology that can enable the automated analysis, extraction, recall, transformation, repurposing, and loading of output and image content, indexes, and resources from source archives to more efficient ECM solutions.

Common Business Challenges

Many organizations today struggle with the difficulties of consolidating or migrating high-volume output and images to a streamlined ECM solution. Among the challenges these organizations face are:

- How to migrate large sets of output, images, and metadata from existing proprietary applications

- A lack of proven methodology and expertise to perform output migrations rapidly and cost effectively for high volumes of output, images, indexes, and resources

- A need to transform a range of print streams and images to online formats

- Requirements for additional indexes or metadata information to be extracted to identify output as specified by new business requirements

- The need to repurpose information locked in legacy output formats for use by existing or new applications

- Regulatory requirements to archive output in formats such as PDF/A, guaranteed to be viewable throughout the required retention period

SOLUTION HIGHLIGHTS

Protect ECM Investment
- *Mitigate the risk of existing ECM systems not keeping pace with business and technical requirements*

Reduce Hard Costs
- *Recurring annual maintenance costs*
- *Staffing costs required to maintain legacy systems*
- *Hardware, storage, and processing costs if mainframe modernization is required and solution is implemented on a distributed platform*
- *Development costs to build print stream and high-volume PDF document transformation and indexing capability*
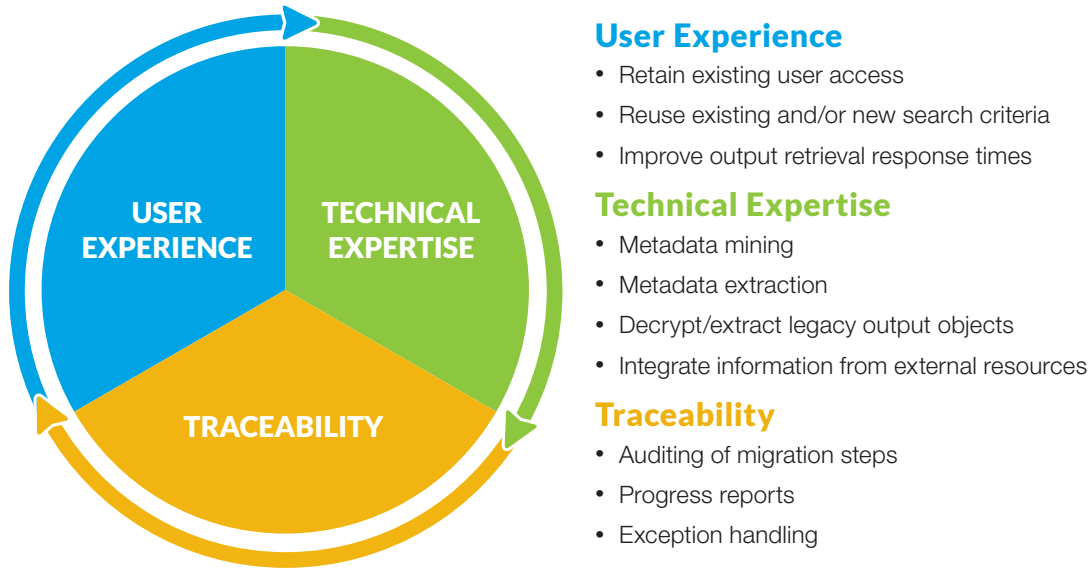
Reduce Soft Costs
- *Faster migration*
- *Extension of existing investment in legacy output and image content*
- *Consolidation of multiple disparate ECM systems*

Business Applications
- *Electronic statement, report and image archive, retrieval, and presentment (cross industry)*
- *Insurance policy applications*
- *Insurance claims processing*
- *Explanation of Benefits (EOBs)*
- *Trade confirmations processing*
- *Credit card processing*
- *Mortgage loan applications*
- *Customer service applications*
- *Healthcare reports*
- *Retail and manufacturing reports*
- *Operational and financial reports*

ENTERPRISE INFORMATION MANAGEMENT

Figure 1: Common Migration Concerns

User Experience
- Retain existing user access
- Reuse existing and/or new search criteria
- Improve output retrieval response times

Technical Expertise
- Metadata mining
- Metadata extraction
- Decrypt/extract legacy output objects
- Integrate information from external resources

Traceability
- Auditing of migration steps
- Progress reports
- Exception handling

When initiating an archive migration project, one challenge shines above all others: auditability. Most customer legal teams require auditability before they sign off on any migration project, since the information required to prove "chain of custody" in court for each high-volume document must be captured, maintained, and reported on. The ability to track the transition of high-volume documents as they move from the source archive through various business processes to the target archive solution is the most important factor to any project owner.

Within the OpenText ECM Migration solution, the tracking information is maintained in a relational database that can be secured and backed up according to the enterprise's IT policies. It can be used to identify output IDs in both systems, as well as all output transformation, metadata extraction, and augmentation steps implemented to facilitate a successful transition.

Also critical to any migration, reporting allows customers to quickly and easily trace the stage of all the output within a migration project through robust reporting and analysis on the audit information, including all output transformation and metadata augmentation.

A Proven Methodology

By combining best practices—the proven OpenText™ DETAIL™ Methodology and OpenText ECM Migration solution with the OpenText™ Output Transformation Server—OpenText is unique in its ability to plan and execute on massive output migrations scheduled to run off-peak or running 24/7 in a lights-out environment. Through years of expertise, OpenText frequently bypasses the source archive APIs and extracts output and metadata directly from the archive storage layer, greatly improving the time required to extract output.
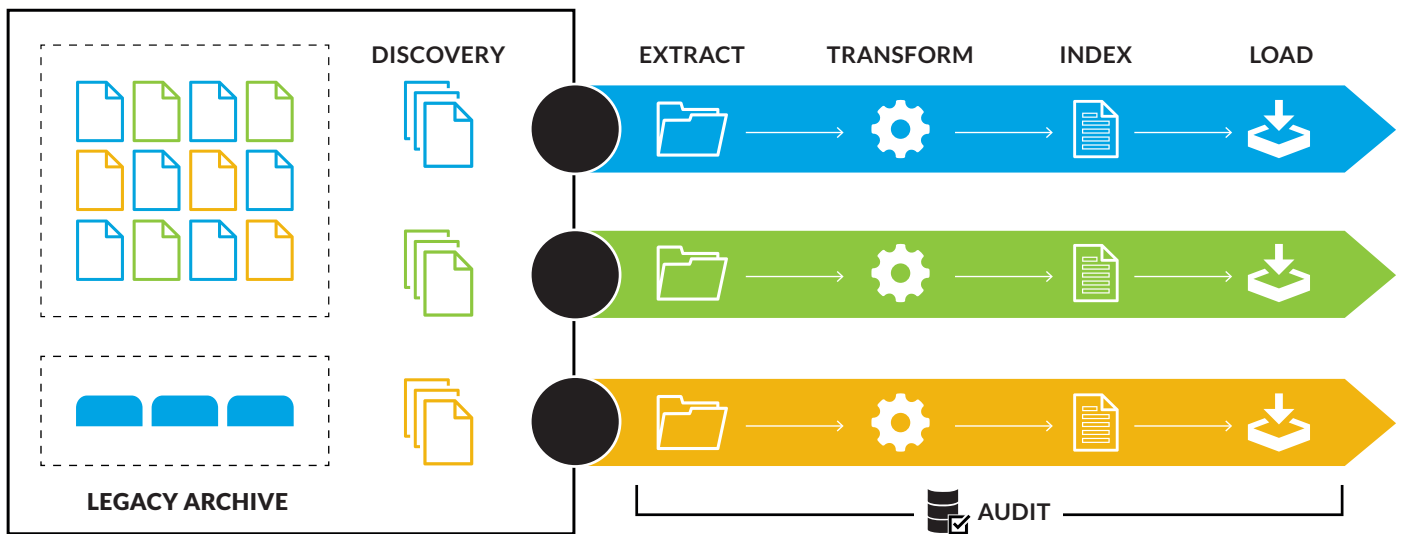

Figure 2: OpenText DETAIL™ Methodology

> *"Enterprises today are often faced with multiple content platforms and repositories without a unifying strategy or technology to make the data actionable. They need the ability to quickly and easily access and repurpose information and make it available through self-service channels."*

KENNETH CHIN, VICE PRESIDENT, GARTNER RESEARCH

In the Discovery and Analysis phase, OpenText migration consultants engage with the customer to perform a review of the existing IDARS/ECM systems and associated business requirements. OpenText delivers a detailed Migration Assessment document outlining the characteristics of the source system, proposed migration methodology, estimated effort, timelines, and costs.

Configurable Automation

The OpenText solution can be tailored to the requirements of each migration, resulting in an automated process flow for executing the following functions:

- Analysis of existing archived output or image files, types, size, storage location, and index information
- Recall of offline output or image files
- Download and association of archived output or image files, index information, and print stream resources to a distributed processing environment
- Transformation from existing archive formats to original print stream formats
- Extraction of metadata information for indexing and document repurposing
- Creation of migration output processing audit trails
- Generation of processing alerts and notifications
- Packaging of migrated output in the format supported by the target ECM systems load interface.

By leveraging OpenText technology, organizations are able to:

- Cut up to 6 weeks off the initial planning in ECM migrations
- Manage all aspects of a migration
- Use standard logging on a single platform
- Provide multi-threaded support out of the box
- Implement process flows, advanced logic, and routers through drag-and-drop interfaces, without the need for scripting
- Connect to and pool the connection with multiple databases and repositories
- Run processes concurrently, by thread or broken down by stage (i.e., Load, Extract, Convert)
- Handle massive volumes of data, output, images, and metadata.

OpenText provides an unparalleled service and product offering to help meet common business challenges and efficiently migrate output and image content stored in IDARS/ECM. Through process automation and expertise, the migration solution that OpenText delivers scales, is tunable, and can be extended to address the unique requirements inherent to every migration project.

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