OpenText and Microsoft® Office 365™

OpenText promotes digital transformation and transparent information governance through seamless integration with the Microsoft productivity cloud.
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Introduction

In a digital-first world, OpenText solutions for Microsoft® Office 365™ help organizations support their digital transformation initiatives, while meeting their compliance and information governance requirements within Microsoft’s productivity cloud. By using OpenText, customers can manage and archive the growing volume of content from both Microsoft and non-Microsoft data sources, as well as significantly reduce ongoing administration and storage costs. More importantly, they are able to implement private, hybrid, and public cloud environments to provide information in business context, whenever and wherever it is needed.

As one of Microsoft’s leading global ISV partners, OpenText provides the industry’s deepest, most comprehensive integration into Office 365. OpenText also offers pre-configured solutions and business applications for Office 365, which support excellence in areas such as Asset and Supplier Management, HR and Finance.

1.0 Digital Transformation, Information Governance, and Productivity Rewards in Moving Your Enterprise to the Cloud

The nature of business has changed significantly in the past decade. The rise of global markets, regulatory shifts, economic uncertainty, changing demographics, increasingly savvy consumers, and disruptive technologies have accelerated the pace of change in the 21st century, and the implications are profound. Digital information has evolved to become the new currency that fuels business growth.

Enabled by technologies such as mobile, social, and the cloud, the exchange of digital information has grown significantly. The amount of content being created and consumed is expanding rapidly—doubling every two years. By 2020, it’s estimated to amount to the creation of more than 40 zettabytes. To maximize success and avoid information paralysis, it’s imperative that enterprises be able to identify and manage their high-value content; both from a legal and regulatory standpoint, and from a productivity and innovation position.

Unfortunately, many enterprises find themselves poorly equipped to manage massive silos of unstructured information, creating unmitigated risk and adversely affecting productivity and flexibility. At the same time, CIOs are looking at their vendor footprint and the number of overlapping applications to determine what can be rationalized to reduce IT costs and complexity.

By the end of this decade, competitive and customer service pressures will require business leaders to develop and execute on wholly digital information management strategies to help the enterprise maximize the value of its information and minimize risk. For many organizations, optimizing this approach will be critical for survival and require an enterprise-class Information Access platform that federates and governs information across all sources and presents it through an effective user interface that makes information available where and when needed.

In a digital-first world there is only one, optimal answer: Successful enterprises will rely on cloud technologies to manage content. By 2017, one third of all enterprises plan to move to cloud-based archives and the number of businesses moving to the cloud in general will have quintupled by then.

Despite these remarkable figures, privacy, security, and compliance concerns have been, and still are, slowing movement to the cloud. Data sovereignty issues are compelling some jurisdictions and governments to question how and where data is stored. In many cases, they are beginning to require that data remain within a certain territory and are imposing restrictions around the security of its storage.
Enterprises need to ensure that they mitigate legal risks and regulatory obligations, manage costs, and ensure content is properly classified, retained, and disposed of per policy. It’s essential to remember - the enterprise owns all the cost and all the risk associated with their content.

Minimizing risk while maximizing value are two goals that may seem contradictory but, in reality, are complementary outcomes of a well planned and executed digital strategy. This is a strategy that uses cloud technology and information management best practices to pave the way to success as a digital enterprise.

1.1 The OpenText-Microsoft Strategic Alliance

Microsoft and OpenText enjoy a longstanding, collaborative relationship that helps our customers lower costs, increase productivity, accelerate innovation, improve business agility, and ensure compliance with company and industry regulatory mandates. In fact, OpenText has been named a Finalist for the 2015 Microsoft Application Development Partner of the Year Award for its work in integrating OpenText solutions with Office 365.

Microsoft and OpenText collaborate to provide solutions for corporate customers that combine the power of the Microsoft Application Platform and Productivity technologies with the deep OpenText understanding of EIM. When running OpenText products with Microsoft technologies, organizations are able to connect all aspects of their information infrastructure and take advantage of their most valuable asset – content.

Together, OpenText and Microsoft also allow organizations to better scale database operations with confidence and improve IT and developer efficiency—all at a lower total cost of ownership over competitive solutions. Through this strategic alliance, OpenText and Microsoft are delivering solutions and frameworks that embrace and extend the Microsoft platform, including Office, SharePoint, Exchange and SQL Server®, with industry-specific applications.

By combining the power of enterprise information management by OpenText with Microsoft’s productivity solutions, companies can utilize the cloud to:

• Support their digital transformation strategy
• Implement a transparent, enterprise-wide information governance strategy
• Significantly reduce costs
• Improve end-user productivity
• Ensure compliance and data sovereignty
• Provide “insurance” for enterprise content in Office 365, SharePoint Online, and Exchange Online

1.2 The Microsoft Approach to Productivity in the Cloud

1.2.1 Office 365™, SharePoint® Online, and Exchange Online

Microsoft Office 365 is essentially a suite of products designed to enhance enterprise productivity in the cloud. It includes: SharePoint Online, Exchange Online, Skype® for Business (formerly Lync Online), Office Professional Plus (comprised of Word®, Excel®, PowerPoint®, Outlook®, OneNote®, Publisher, Access®, and InfoPath®), and Office Web Apps (Word, Excel, PowerPoint in the browser)

In Microsoft’s Q4 2015 earnings call, it revealed that Office 365 is now in use in four out of five Fortune 500 companies. The service has 15 million subscribers, with a million more signing up every month.
According to the International Business Times\(^1\), a recent Bitglass survey of cloud usage by more than 120,000 companies indicated that the number of companies using a cloud application as their productivity suite jumped from 28 percent to 48 percent over the past year. The Bitglass survey also shows that Microsoft’s market share of online productivity applications is now over 25 percent.

Notwithstanding this rapid acceptance of Office 365 by enterprises, many companies still have concerns about how best to use Office 365 and the cloud space in general. For example, a recent AIIM Research Report\(^2\) indicated that, of enterprises moving to use Office 365/SharePoint Online, a majority of them anticipate having to implement a hybrid on-premise/cloud environment.

In addition, the surveyed companies anticipated needing third-party applications to supplement Office 365/SharePoint Online for governance and monitoring, regulatory compliance, formal records management, BPM tools, and connectivity to HR, ECM, and other line-of-business processes.

### 1.3 OpenText Integration with Office 365

The OpenText experience supports the results of the AIIM survey and we believe that enterprises embracing Office 365 may encounter one or more of the following challenges:

- Integrating/migrating on-premise archives with Office 365
- Providing archival and records management for content created and stored in Office 365
- Extending business applications tied to ERP and CRM systems (such as HR, Finance, Asset Management, Sales or Marketing) into Office 365
- Ensuring that everyone has access to the same information in a hybrid environment (i.e., no synchronization gaps between on-premise and Office 365, regardless of access through cloud or on-premise productivity applications)

As organizations move to becoming fully digital enterprises, OpenText solutions for Office 365 help support digital transformation initiatives, while meeting compliance and information governance requirements within Microsoft’s productivity cloud. By using OpenText, customers can manage and archive the growing volume of content from Microsoft-related and all other sources, as well as significantly reduce ongoing administration and storage costs. More importantly, they are able to implement private, hybrid, and public cloud environments to provide information in business context, whenever and wherever it is needed.

As one of Microsoft’s leading Global ISV partners, OpenText provides the industry’s deepest, most comprehensive suite of integrations into Office 365 to support information governance. OpenText also offers pre-configured solutions and business applications for Office 365 that support excellence in areas such as Asset and Supplier Management, HR, Finance, Sales and Marketing.

#### 1.3.1 Information Governance

OpenText offers a number of solutions that augment the information governance capabilities of Office 365:

- OpenText Application Governance & Archiving for Microsoft SharePoint (AGA)
- OpenText InfoFusion
- OpenText Email Archiving, Email Monitoring and OpenText Email Management for Microsoft Exchange
- OpenText Secure MFT and OpenText Secure Mail

Poorly managed SharePoint and email content represents significant corporate risk and potential liability. Organizations must secure and retain relevant records under a variety of laws, regulations, policies and other mandates for the appropriate time frame or face fines for the illegal destruction of content and sanctions related to non-compliance. Substantial costs and risks correlate directly to the volume of content retained.

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The issue is no longer about curbing the cost of storing content, but in minimizing the risk associated with keeping it.

OpenText Information Governance solutions provide an effective, compliant framework to securely store, manage, and retrieve an organization’s content. Using these solutions, organizations can quickly and transparently reduce costs by offloading large amounts of content such as email or SharePoint Online content from the Microsoft productivity cloud for storage in a single repository that is more suitable for long-term retention. Critical business information can be retrieved quickly, helping to improve efficiency. Compliance is more easily achieved with the ability to assess, identify, manage, and destroy business content in accordance with external laws and regulations and internal policies.

As an example, OpenText Application Governance & Archiving for Microsoft SharePoint (AGA) is the only solution that combines all content sources within a sound information governance strategy while including sophisticated management tools, a framework for provisioning native SharePoint business applications with built-in compliance, and the ability to integrate enterprise systems and other content sources in a single solution.

Through these capabilities, AGA helps organizations meet compliance and archiving requirements, manage the growth of SharePoint sites, provide access to enterprise content from disparate sources, reduce ongoing administration and storage costs, and improve user productivity.

AGA is unique in the marketplace as it supports multiple SharePoint on-premise farms - even ones drawn from different SharePoint versions, SharePoint Online (Office 365), or hybrid environments, through the same compliance and archiving backend infrastructure.

With AGA, enterprises can:

- **Ensure Information Governance on-premise and in the cloud through compliance and archival of SharePoint on-premise and SharePoint Online content (Office 365)**
- **Significantly reduce costs**
- **Improve end user productivity and leverage your investment into SharePoint**
- **Get insurance for your content on the Microsoft cloud**
- **Standardize on your compliance rules**

OpenText offerings for SharePoint Online and Exchange Online are designed for three different scenarios:

- Cost reduction and security: Archiving for deduplication of content and security in a central repository
- Legal compliance: Monitoring for adherence in all content
- Interactive classification: Management of classifying content

*Note that AGA site deployment is not currently supported in Office 365.*
All three scenarios are supported by the Information Governance features provided by OpenText Content Suite Platform to Office 365:

• eDiscovery capabilities with full text indexing
• Legal Holds (query-based or user holds)
• Defensible Disposition

1.3.2 Business Productivity

OpenText business productivity add-ons for Office 365 include:

• SharePoint Services for Extended ECM for SAP Solutions
• SharePoint Services for Extended ECM for Oracle EBS
• Brava! for SharePoint
• RightFax

As an example, the goal of OpenText SharePoint Services for Extended ECM for SAP Solutions and SharePoint Services for Oracle EBS is to give users access to the information in the context of their day-to-day business activity. Tight integration into different systems makes business workspaces accessible from SAP, Oracle EBS, the user’s desktop, Office clients (including Outlook), SharePoint, Office 365, SharePoint Online, mobile devices, and the OpenText ECM web user interface.

OpenText Enterprise Applications

Information-fueled business processes

OpenText SharePoint Services for Extended ECM for SAP and Oracle EBS tightly integrate with SharePoint:

• SharePoint Services for Extended ECM for SAP and Oracle EBS (SPS) provide a browser view for Extended ECM for SAP and Oracle EBS business workspaces. SAP or Oracle EBS master data or information about related business workspaces is displayed in SharePoint Online. Using the browser view, users also can upload new content into business workspaces.
• SPS also provides integration into SharePoint search, and SharePoint Online users can search seamlessly for content in business workspaces.
• SharePoint Online is commonly used for collaboration. Users can work with SharePoint team sites using collaboration features, such as calendars and task lists, which are synchronized with Outlook, or when several people have to work on the same document, they can use Co-Authoring.
• SPS provides the option of moving/copying content from SharePoint Online sites into business workspaces. Users can move/copy content interactively and an automatic process can be set up to transfer the content. Ideally, users simply work with a SharePoint Online collaboration site, and content is moved/copied automatically and transparently to a business workspace when the work is finished.
In addition, to accelerate the roll-out of business solutions, OpenText provides configuration packages that save costs and minimize implementation risks. By combining SharePoint, SharePoint Online, and SAP or Oracle with OpenText, teams can work on SAP and Oracle-related content within SharePoint Online while collaborating in the context of SAP and Oracle business objects.

For example, if a technician has to do a failure analysis in Enterprise Asset Management together with several people, he can use SharePoint Online for collaborating with his co-workers, and the tasks can be managed in task lists that are synchronized with Outlook in Office 365, or content can be stored in SharePoint Online document libraries. After completion of the failure analysis, it is very likely that some or all of the created content should be stored in a business workspace, as the information is related to a maintenance process managed in SAP.

1.3.3 Office Productivity

OpenText offers a number of solutions for office productivity, such as Content Suite Office Client Integrations. For example, OpenText™ Enterprise Connect is an alternate desktop interface to the standard OpenText Content Suite Platform web environment that integrates seamlessly with Office 365 Professional Plus desktop clients.

Enterprise Connect removes the complexity of carrying out ECM-related tasks for users while supporting organizational policies for capturing, storing, and retaining business information. By not having to leave familiar applications such as Outlook, Word, and Excel, information workers can adhere to compliance mandates with minimal effort and without having to learn new ways of working with content.

As an additional example, OpenText™ Office Editor for Office 365 offers users a seamless, instant editing experience, providing the performance of editing files on a local hard drive without installing any special add-ons. Documents or folders can be taken offline for use, and users can ensure changes are synchronized to the repository once connectivity is restored.
2.0 Making the Most of Your Office 365 Investment with OpenText Solutions

2.1 Reference Materials

Here are links to reference materials relating to OpenText support of Microsoft Office 365:

- **Press Release** “OpenText Application Governance & Archiving 10.7 for Microsoft SharePoint Introduces Microsoft Office 365 Support”: http://www.opentext.com/who-we-are/press-releases?id=F0897A1536C046FFA7E592E9A0C1C26D

- **Video** “OpenText Excellence in Enterprise Procurement with Oracle EBS and Microsoft Office 365”: http://www.microsoft.com/enterprise/partner/opentext/default.aspx#


2.2 Case Studies

For case studies on the OpenText solutions that support Microsoft Office 365, see the following: http://www.opentext.com/customer-stories
3.0 OpenText Product Sheets

Download or browse the complete OpenText Products and Services Catalog: 

The following subsections include links to product sheets for individual OpenText solutions that support Microsoft Office 365.

3.1 Information Governance Solutions

3.1.1 OpenText Application Governance & Archiving for Microsoft SharePoint (AGA)

Application Governance & Archiving for Microsoft SharePoint extends the native records capabilities within the SharePoint application—for example, ensuring that content created or managed with SharePoint meets strict DoD 5015.2 and VERS records management guidelines. OpenText Application Governance & Archiving (AGA) 10.7 for Microsoft SharePoint enables customers to move from on-premises instances of Microsoft SharePoint to Microsoft Office 365 in the cloud, while maintaining core information governance and compliance processes. Integrated with Office 365, AGA provides:

- **Centralized Access:** leverage SharePoint as the preferred end-user access point for all enterprise information while searching and accessing content spread across numerous locations, such as email, files, legacy, ERP, CRM, and others directly through SharePoint
- **Formal Compliance:** support DoD 5015.2 and other records management guidelines; enable physical records support (box, warehouse, and barcode); provide centralized and unified policy management for SharePoint, email, files, SAP, and legacy repositories
- **SharePoint Archival:** archive documents, sites and site collections; manage inactive content and provide site retirement for orphaned sites; maintain compliance for, and access to, all archived sites

For more information, see: 

3.1.2 OpenText Email Archiving, Monitoring, and Management for Microsoft Exchange

OpenText Email Archiving for Microsoft Exchange Online enables organizations to manage the exponential growth of corporate email, reduce storage costs, and improve server performance.

OpenText Email Monitoring for Microsoft Exchange Online provides a robust solution for archiving and retrieving all email content sent or received by specific accounts within an organization, ensuring that the complete range of electronic communications from specific users and groups is fully archived and auditable. By capturing all enterprise emails, this holistic approach ensures legal compliance.

OpenText Email Management for Microsoft Exchange Online is designed to help companies identify and capture only the email messages that are useful or important to keep. OpenText Email Management for Office 365 Professional combines with the Outlook Client to provide a richer and more interactive experience with Office 365 email.

For more information, see: 
3.1.3 OpenText Secure MFT and OpenText Secure Mail
Secure Mail is a cloud-based, secure messaging solution for encrypting, tracking and preventing the leakage of confidential information. It enables internal and external users, as well as applications to easily exchange secure messages and attachments. Secure Mail's tight integration with existing email systems makes exchanging and tracking encrypted messages and files remarkably simple. Users never have to leave their Inbox to access robust features, and also can access Secure Mail via mobile apps or through the web portal from any device.
For more information, see:
http://www.opentext.com/what-we-do/products/information-exchange/secure-messaging/opentext-secure-mail/secure-mail-for-office-365

3.1.4 OpenText InfoFusion
OpenText InfoFusion is designed to break down information silos and aggregate that information to amplify the benefits of EIM. InfoFusion provides powerful data integration, content migration, data archiving, and legacy decommissioning tools that allow organizations to discover, analyze, and act on information throughout their enterprise, while also helping them identify and address critical business issues. OpenText is working to provide Office 365 connectivity for InfoFusion.
For more information, see:

3.2 Business Productivity Solutions
3.2.1 OpenText Microsoft SharePoint Services for Extended ECM for SAP® Solutions and SharePoint Services for Extended ECM for Oracle® EBS
OpenText Application Governance & Archiving for SharePoint (AGA) and SharePoint Services for Extended ECM (SPS) facilitate the integration of content from other enterprise applications such as SAP and Oracle EBS. They also support multiple SharePoint on-premises landscapes (even with different SharePoint versions) and support SharePoint Online (Office 365) to hybrid environments through the same compliance and archiving backend infrastructure.
For more information, see:
For more information on AGA, including an ROI calculator, see www.opentext.com/agaforsharepoint. http://www.opentext.com/campaigns/agaforsharepoint
For demos of Extended ECM for SAP Solutions being applied to specific business needs, see:
Procurement Scenario: http://youtu.be/59JnHT2Vspk
Plant Maintenance Operation Scenario: http://youtu.be/yDPrrnrW_c
3.2.2 OpenText Brava! for Microsoft SharePoint

Brava! offers simple, web-based viewing, annotation, redaction, and publishing for SharePoint, giving information workers better access to content and faster communication with co-workers. Brava! makes it easy to view, annotate, redact and transform virtually any type of file—including PDFs, Microsoft Office documents, image files, CAD drawings, 3D models, and even video clips—all from an intuitive, browser-based interface.

For more information, see:
http://www.bravaviewer.com/brava-microsoft-sharepoint

3.2.3 OpenText RightFax

The RightFax Connector for Microsoft Exchange or Exchange Online will turn documents into faxes at the click of a single button built into the user’s toolbar. Users do not have to format the address line in a message just press the fax button. Because RightFax can grow to enterprise-class volume levels, the Exchange integration with RightFax can scale upward to meet any company’s needs. RightFax is integrated with Outlook and Exchange Online (Office 365) as the market-leading fax solution for Exchange.

For more information, see:

3.3 Office Productivity Solutions

3.3.1 OpenText Content Suite Office Client Integrations

OpenText Content Suite Platform, the foundation for OpenText Enterprise Information Management (EIM) offerings (including the OpenText Extended ECM Solutions), is a comprehensive Enterprise Content Management (ECM) system designed to manage the flow of information from capture through archiving and disposition. SharePoint Services for Extended ECM for SAP and Oracle EBS uses the OpenText Enterprise Library as a Records Management system. OpenText Enterprise Library is essentially the combination of OpenText Content Server and OpenText Archive Server. OpenText Content Server provides metadata management, permission management, records management, and full text search for archived content. OpenText Archive Server is used to store/manage content archived into specific storage devices.

Content Suite Platform ensures agile information governance to address an increasingly complex and dynamic regulatory landscape and the rapid growth of business information.

For more information, see:

OpenText Enterprise Connect for Microsoft Office 365 Professional Plus and Office Editor for Office 365 are additional examples of OpenText EIM solutions supporting office productivity.

For more information, see:
4.0 Summary

By combining the power of enterprise information management by OpenText with Microsoft productivity solutions, companies can use the cloud to support their digital transformation strategy, implement transparent, enterprise-wide information governance, significantly reduce costs, improve end-user productivity, ensure compliance and data sovereignty, and provide “insurance” for content in Office 365, SharePoint Online, and Exchange.

About OpenText

OpenText is a $1.9 billion public company with over 120 offices worldwide and over 100,000 customers. OpenText provides Enterprise Information Management (EIM) software that enables companies of all sizes and industries to manage, secure, and leverage their unstructured business information, either in their data center or in the cloud. OpenText is regularly cited as an EIM leader by Gartner Group and Forrester Research. To learn more about OpenText (NASDAQ: OTEX; TSX: OTC), please visit www.opentext.com.