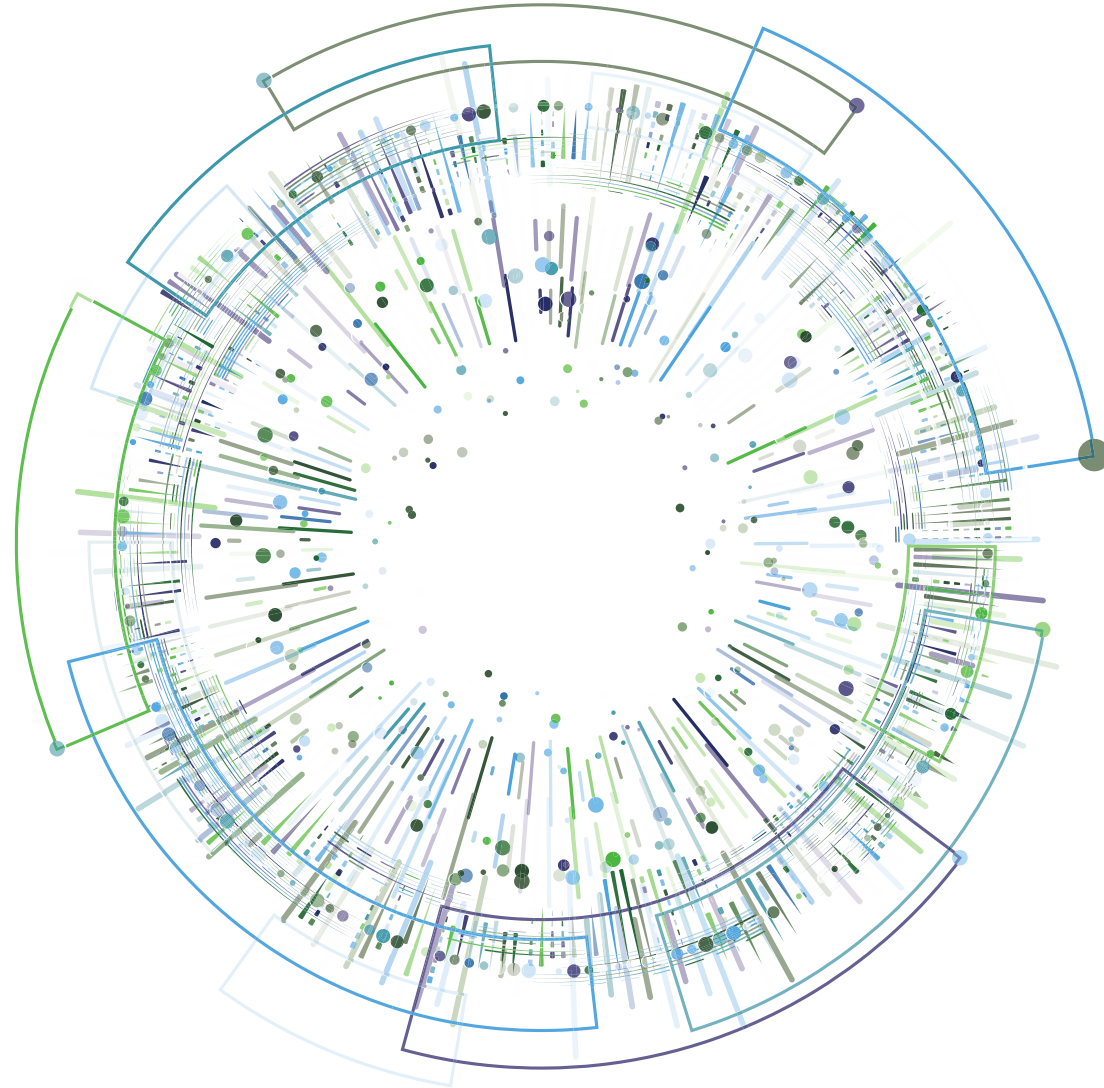


February 2021

## Digital Content Advantage (DCA)

OpenText offering overview



# OpenText

Deloitte leverages OpenText technologies to help improve content-heavy operational processes; whether for an entire enterprise or for a specific business function such as Human Resources.

Deloitte has been named OpenText's number one global alliance partner for more than ten years.



## PORTFOLIO

- ▶ **Content and Records Management:**
  - Content Suite
  - Documentum
- ▶ Extended ECM Integration
- ▶ Exstream Content Correspondence
- ▶ InfoArchive Application/Data Archiving
- ▶ Vendor Invoice Management for AP



## CORE VALUE

- ▶ Providing structure around unstructured content so it can be managed and searched more easily
- ▶ Seamlessly view associated content within ERP systems such as SAP
- ▶ Enhance process by embedding content into workflows
- ▶ Support governance requirements such as records management, privacy, and security

## OpenText Overview

# Deloitte OpenText Alliance

OpenText's technologies are the engine behind Deloitte solutions that help make contextual information a reality. It shows in our track record, and it shows in the delivery excellence awards Deloitte receives from OpenText, year in, and year out.

**10+**

continuous years of excellence designations



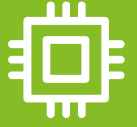
▶ *Global Systems Integrator of the Year since 2010*

▶ *A consistent Exstream "Partner of the Year"*

**"** The multi-year alliance between OpenText and Deloitte has enabled our joint customers to truly embrace the challenges and opportunities that digital offers. As a leader in formulating and deploying digital transformation strategies to global organizations, Deloitte is a valued alliance to OpenText, bringing the right people, skills and vision that help our customers to truly revolutionize their businesses. Together, OpenText and Deloitte are developing and deploying digital technologies that enable organizations to re-focus their operations and deliver success in the age of digital. **"**

**Mark Barrenechea**  
CEO, OpenText

# Core modules and Deloitte offerings



CORE MODULE	DCA OFFERING	DESCRIPTION
Content Suite or Documentum	1. Content Management in the Cloud	Using either Content Suite or Documentum provides core content and records management capabilities for the enterprise provided on-prem, in a public cloud or on OpenText's private cloud
Extended ECM for Government and Capture Center	2. Content for State and Federal - GPS	Using a portfolio of tools including Content Suite or Documentum with specific functionality focused on the citizen – both management and user; including capture and self-service
Exstream and Capture Center	3. Content Correspondence Management	Using Exstream (or its predecessor StreamServe) provides high-volume and personalized outbound communications either en masse or individually (e.g., within a digital or paper monthly bill: to the customer, employee, citizen, or business partner); Capture Center addresses inbound mailroom
Extended ECM for Microsoft 365	4. Microsoft Ecosystem	Providing enhanced content and records management capabilities from Content Suite seamlessly integrated with Microsoft 365
Extended ECM for Engineering	5. Content for Physical Assets and Facilities	Providing content management capabilities using either Content Suite or Documentum for engineering specific use-cases and integration (e.g., plant assets, capital projects, handover, facilities management)
InfoArchive and Archive Center	6. Ap and Info Archiving	Using InfoArchive and/or Archive Server to implement an archiving strategy to better manage legacy information and sunsetting of applications (e.g., during an SAP S/4HANA implementation)
Extended ECM for SAP SuccessFactors	7. Content for HR	Providing content and records management capabilities seamlessly integrated with SuccessFactors providing an enhanced HR/ employee experience
Extended ECM for SAP and Vendor Invoice Management	8. Content Management for SAP	Often sold on "SAP paper", content and records management capabilities to complement SAP through a seamless/fully integrated experience



# Enterprise Content Management



Deloitte uses OpenText technologies to help improve and transform content-heavy operational process, whether for an entire enterprise or for a specific business function such as Facilities or Human Resources. The core platform providing document management and records management compliance uses either:



**OpenText Content Suite**

**OR**



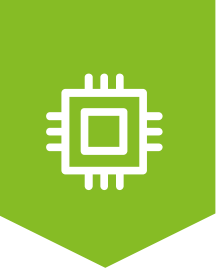
**OpenText Documentum**

Additional integration capabilities are provided through OpenText Extended ECM focused on specific third-party platforms and their processes (e.g., SAP4HANA, Microsoft 365, SAP SuccessFactors).

Deloitte has created offerings and accelerators to help scope, deploy, and operate content and records management capabilities, tailored to your current needs and sensitive to your defined future road map and business strategy.

Enterprise Content Management can be a significant enabler for operational transformation helping align data with content; providing a manageable and consistent digital platform; and establishing an environment for deep analytics and insights.

# Enterprise Content Management in the Cloud



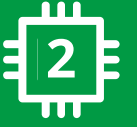
Moving to a cloud environment can reap significant benefits:

- Reduced costs associated with data center and hardware maintenance/upgrades
- Reduced costs for support staff, including headcount and training costs
- SLAs for system uptime/availability
- Automatic, scheduled product upgrades
- Ability to migrate only what you need to the cloud, and options for archiving the use of OpenText tools like InfoArchive

**OpenText is committed to a cloud vision. Over the past two years, they have enabled and released cloud editions of their Enterprise Content Services suite, including Content Server, Documentum, and the Extended ECM for SAP suite of products. These solutions run on the OpenText Cloud, AWS, GCP, and Azure.**

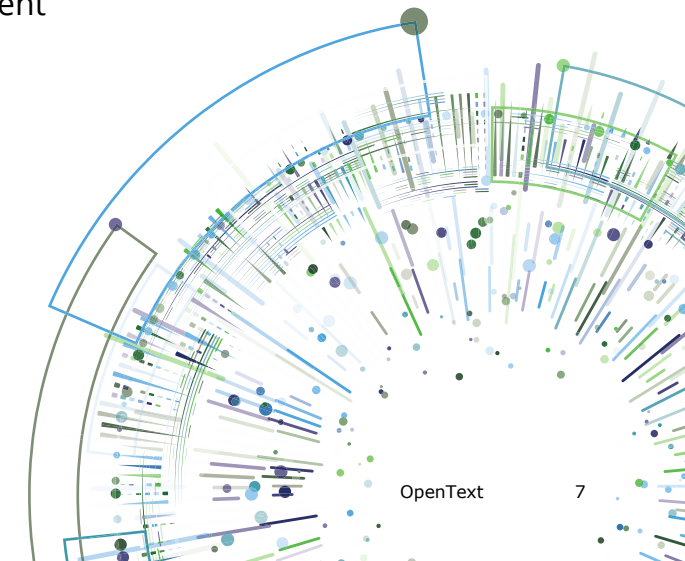
OpenText	Deloitte CMS	OpenText + Deloitte CMS
Providing industry leading EIM services to commercial and public sector enterprises	Leading global systems integrator providing world class technology solutions to enable client business results	Leading EIM services and solutions supported in public cloud by a combination of OpenText and Deloitte resources
<p><b>CLOUD</b> Cloud optimized products and services using OpenText Private Cloud. Support AWS, GCP, Azure client deployments of OpenText products.</p> <p><b>APPLICATION MANAGED SERVICES</b> Managed services of customer development and production environments for OpenText products</p>	<p><b>CLOUD</b> Leading Cloud practice helping clients, transform, migrate and deploy cloud services across AWS, GCP, Azure. Leading partner of AWS and GCP (GSI of the year 3 years). Leading Azure practice but Microsoft is an audit client.</p> <p><b>OPERATE SERVICES</b> Managed services and support of customer solutions (OpenText plus). Cloud managed services adds Hyperscaler support services to offering.</p>	<p><b>MANAGED SERVICES</b></p> <ul style="list-style-type: none"> <li>• Support new OpenText Public Cloud implementations</li> <li>• Migrate customer applications from on-premise to cloud (OpenText plus)</li> <li>• Provide ongoing onshore/offshore application and cloud support services</li> </ul> <p><b>RELATED SERVICES</b></p> <ul style="list-style-type: none"> <li>• New OpenText license sales and implementations</li> <li>• Integration with other ecosystem partners (e.g., SAP, Salesforce)</li> <li>• Customer solution innovation (e.g., AI/ML integration)</li> </ul> <p><b>ENABLING SERVICES</b></p> <ul style="list-style-type: none"> <li>• Engineering services</li> <li>• Dedicated onshore/nearshore support resources</li> <li>• OpenText data center migration</li> <li>• OpenText environment migration</li> </ul>

# Enterprise Content Management for Government



Using a portfolio of tools including Content Suite, Capture Center, and Extended ECM for SAP provides functionality focused on the citizen, assisting with an overall digital citizen vision.

- Digital file and content management
- Case management, workflow, and collaboration (e.g., citizen or department based as permitted)
- Content capturing and classification
- Compliance and governance
- Capture of physical documents, OCR recognition, and automated classification
- Citizen outbound communications (paper or digitally)
- Seamless integration into SAP and Microsoft Office
- DoD certified records management





# Exstream: Content Correspondence

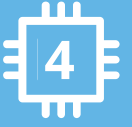


Improves effectiveness and reduces cost for outbound communications and correspondence for customers, employees, business partners, or other third parties.

- More easily author and publish communications consistently through the most effective/preferred channels. Providing an impactful message to end users, so there is less misunderstanding and expensive inquiry post-messaging.
- Support both physical and digital media with consistent, timely, and personalized messaging.
- Embed messaging within any type of document (e.g., for insurance to include personalized policies, quotes, renewals, proposals; and for utilities to include monthly statements).
- Integrated into third-party tech platforms (e.g., for insurance such as Guidewire and Duck Creek).
- Design once, deliver anywhere: ensure consistent branding across print, electronic, and digital channels for consistent, multichannel communications.
- More precisely manage regulatory compliance requirements around disclosures and omissions.

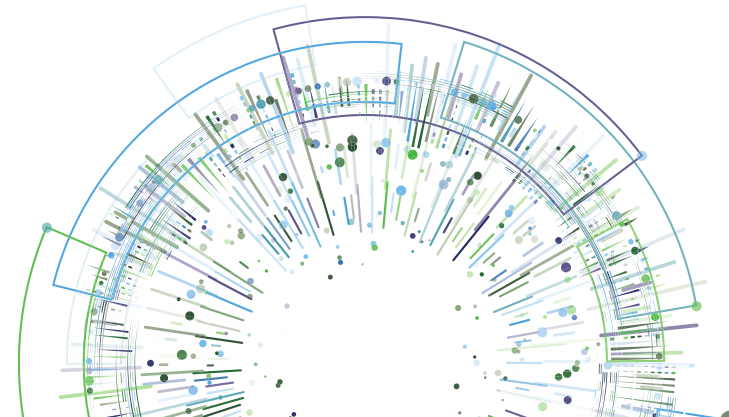


# OpenText and the Microsoft ecosystem



Extended ECM for Microsoft addresses integration into Microsoft 365. When designing an effective content management solution, it would be incomplete without addressing functionality to author, revise, and manage documents using office productivity tools such as Microsoft Word (Office/365).

- Seamlessly saves a document, provides classification as a record, and its status within the document life cycle.
- Stores in one common and secure repository providing access links; supporting management of a single copy and versioning (e.g., single source of truth requirement).
- Can take advantage of other Microsoft content services including content analytics and knowledge management as well as Azure Cloud.
- Provides easier management support of records management and eDiscovery reducing ad hoc, inconsistent localized storage.



# Extended ECM For Engineering: Physical Asset Management



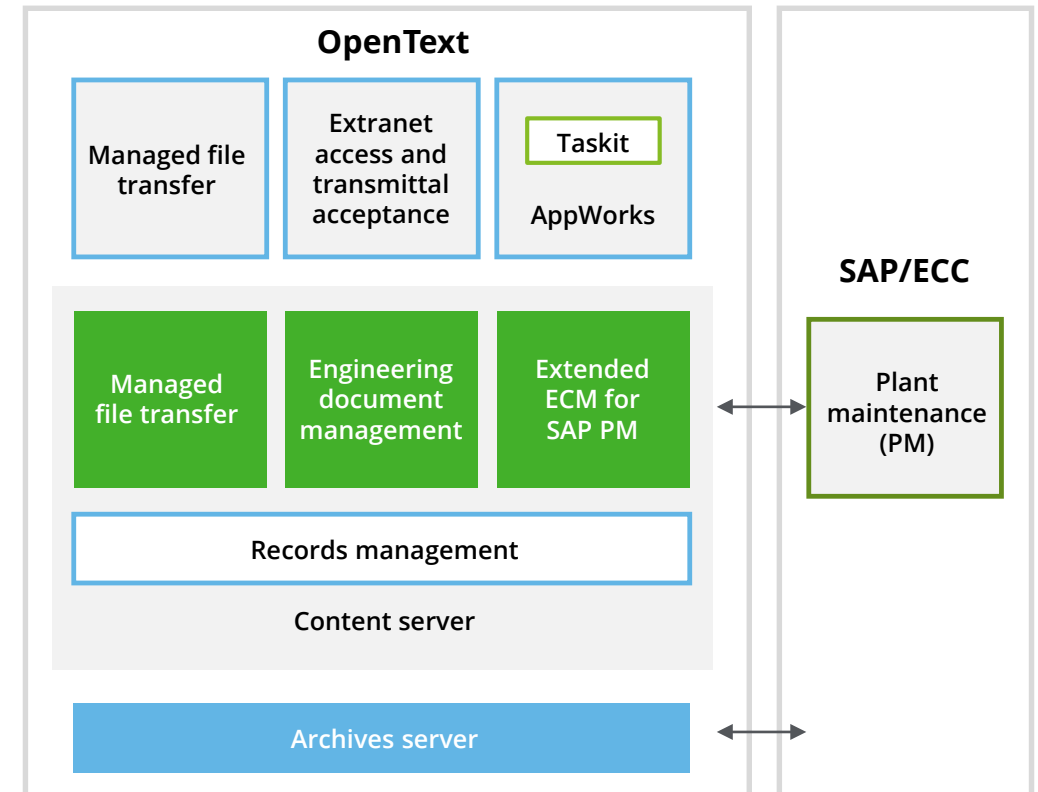
## The business problem and typical symptoms

The management of information about physical assets is more than a technical challenge. Accurate and up-to-date engineering and technical documentation is critical for ongoing operational effectiveness and risk mitigation across a wide range of industries including Oil & Gas, Mining, Utilities, Manufacturing, and Transportation.

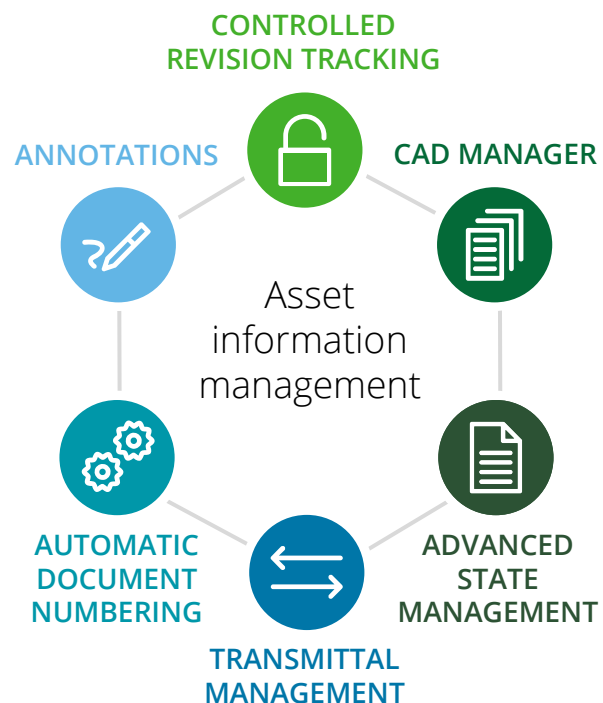
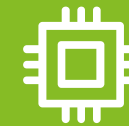
## Solution and potential benefits

After years of working with many of the world's most respected and well-known companies, we have designed a solution that targets some of the most common and difficult asset information management challenges.

- Increased visibility and improved management of corporate assets through timely access to the latest engineering and technical documents
- Pre-defined workflows and the ability to access unstructured information from within the context of business processes in ERP and plant maintenance systems
- Simplified compliance through improved information accuracy and by making information easier to access
- Leading practices and governance processes that help enhance efficiency and address common sources of risk
- Mobile access to documentation and digital assets



# Extended ECM For Engineering: Capital Projects and Facilities Management



## The business problem and typical symptoms

For capital project design, build, handovers, and operate, as well as general plant maintenance creating, managing, and referencing technical documentation, is critical for ongoing operational effectiveness and risk mitigation. For example, engineering and operations need quick access to the latest documentation for plant, facilities, and equipment so that they can do their jobs efficiently. At the same time, environmental and safety regulations specify the need for processes and systems that protect and control this documentation.

## Solution and potential benefits

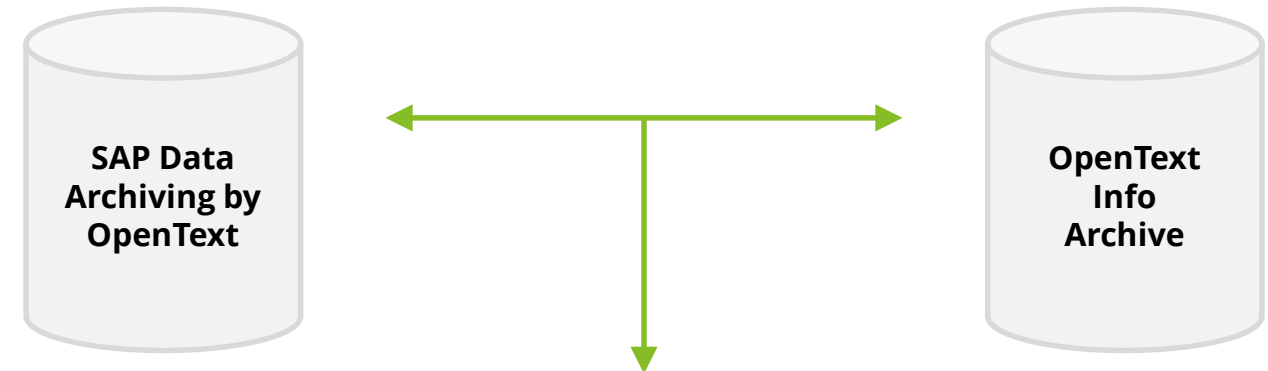
- **CONTROLLED REVISION TRACKING** — Track revisions throughout the document life cycle using OpenText Content Server as the central repository.
- **CAD MANAGER** — The structure of the complex relationships between CAD drawings is maintained within the metadata of the OpenText Content Server repository.
- **ADVANCED STATE MANAGEMENT** — Preconfigured process flows enforce the required level of document control at each stage in the document's life cycle.
- **TRANSMITTAL MANAGEMENT** — Outbound transmittals are securely packaged and controlled through an automated process that enables standardized transmittal packages and offers consistency and auditability for controlled information that leaves the organization.
- **AUTOMATIC DOCUMENT NUMBERING** — Implementation of complex document schemas inside OpenText Content Server facilitates a standardized document creation process with standard document formats.
- **ANNOTATIONS** — Browser-based access to view, annotate, and collaborate on files stored in the OpenText Content Server eliminates the need for expensive licenses for native applications and increases the accessibility of important technical data.

# Archiving Center and InfoArchive: Ap/Data Archiving

Implementing an archiving strategy alongside SAP4HANA implementations is a cost-effective way to address growing content such as AP invoices.

However, this is only one aspect of archiving. It can address other growing information areas including third-party technology platforms being replaced by SAP but still required for reference (potential sunset aps).

Depending on your needs, archiving may leverage SAP Data Archiving by OpenText, OpenText InfoArchive, or a strategy around both.



Archiving is a cost-effective means to store information still required for reference look-up within operations, for legal holds and records management retention requirements. It not only moves information off of expensive storage but in some scenarios allows for application sunseting.



# Extended ECM for SAP SuccessFactors



## Key business drivers of SAP SuccessFactors xECM



Create a complete digital record of your employee files



Compliance with legal and regulatory requirements



Simplified content (full text) search and reporting



Generate employee documents/correspondence



Support shared services framework



Support hybrid environments (cloud and on-premises)

## HR processes begin and end with a document

### RECRUITING AND ONBOARDING

- Offer letter
- Job description
- Background Check
- References
- I-9
- NDA
- EEO
- Welcome video
- Employee Handbook
- Forms

### PAYROLL AND COMPENSATION

- Incentive plan
- W-2 and W-4
- Direct deposit
- Garnishments
- 401 (k)
- Beneficiaries
- Bonus plans
- Pension plans
- Stock options
- Executive plans

### BENEFITS HEALTH AND WELFARE

- Beneficiaries
- Verify Dependents
- FMLA docs
- STD docs
- Direct deposit
- Fitness Reimbursement
- ACA (Affordable Care Act)

### PERFORMANCE MANAGEMENT

- Performance Review
- Reference letter
- Disciplinary letter
- Promotion letter
- Transfer letter
- Expat docs
- Job analysis

### LEARNING AND DEVELOPMENT

- Certifications
- Sexual Harassment
- Trainings
- OSHA training
- Professional Memberships
- Videos

### SEPARATION/ RETIREMENT

- Resignation Letter
- Term letter
- Exit list
- Unemployment
- Vacation payout
- Legal document
- Retirement plans
- COBRA
- Beneficiaries

Deloitte's Content for HR solution powered by OpenText xECM for SuccessFactors enhances HR management and the employee self-service experience.

### DOCUMENT GENERATION

- Pre-defined templates
- Document composition
- Document process automation
- Review and approval workflows
- Multi-channel distribution
- Self-service

### DOCUMENT MANAGEMENT

- Centralized storage with metadata
- Folder structure and taxonomy
- HR processes and workflows
- Search and retrieval
- 360-degree view of employee
- Role-based permissions

### RECORDS MANAGEMENT

- Governance and regulatory compliance
- Document completeness check
- Legal holds
- Audit trail
- Custom reporting

# SAP with OpenText: Completing the SAP digital journey



Accounts Payable Automation solution from capture to recognition to workflows. Fully integrated with S/4HANA and Fiori apps supports global **Vendor Invoice Management** including integration with Procure to Pay and Ariba.

**Eliminates** costs and inefficiencies, while supporting centralized operations and reduced cycles and financial reporting.

**Archive Center** for SAP is a core component and enables storage, retrieval and secure long-term retention of archived data and documents.

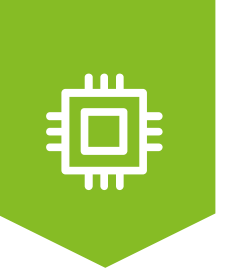
Leveraged to **effectively sunset legacy systems** with tools such as **Info Archive** to ease of access reducing IT spend and maintenance cost and reduced dependency on legacy SMEs

**OpenText Extended ECM for SAP** (xECM) can help fuel **digital transformation** by seamlessly connecting SAP with OpenText Content Server providing users with the ability to see all information and content relevant to their business functions, processes, and activities as well, xECM provides seamless integration with SuccessFactors, Workday and SharePoint.

Each of these **OpenText solutions** can be delivered as part of an **S/4HANA road map** across **industries** and can be customized to specific requirements as part of the **transformation journey**.



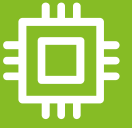
# SAP with OpenText: Completing the SAP digital journey



1 Lead opportunities	2 Phase 0 solutions	3 Extend Wins
<p><b>Lead opportunities for OpenText solutions on S/4HANA project</b></p> <ul style="list-style-type: none"> <li>Go-to-market campaigns with LCSPs/account managers</li> <li>Build awareness with practice leaders</li> </ul>	<p><b>Archiving strategy/content management road maps</b></p> <ul style="list-style-type: none"> <li>Phase 0 assessment to help build content management approach</li> <li>Phase 0 assessment to build migration/archiving strategy for legacy systems</li> </ul> <p><b>ARCHIVING STRATEGY</b> – A road map to provide a centralized repository for different legacy applications not having to maintain multiple software licenses, reducing hardware, software, and manual costs</p> <p><b>CONTENT MANAGEMENT</b> – From image and document metadata management to drive compliance and support overall information architecture from S/4HANA process areas to integration with SAP Success Factor on document integration</p> <p><b>OCR CAPABILITIES</b> – From AP workflow automation with VIM and integration with Ariba; to OCR expansion to sales orders; HR documents to delivery orders</p>	<p><b>Opportunity to assess OT solutions on each existing SAP project</b></p> <ul style="list-style-type: none"> <li>Assess each project to determine need for OT solutions or upgrade opportunities</li> </ul>



# Extended ECM for SAP: Procure To Pay Accounts Payable



AP payment automation needs to address direct payment, paper invoices, and everything in between.

Solutions can include triple-check verification for accuracy and seamlessly integrate into SAP Procure To Pay to reduce risk of errors from re-keying.



**SAP  
Ariba**



**SAP Vendor  
invoice  
management  
by OpenText**

## CORE VALUE

- Reduce manual keying, mispayments and other errors
- Centralize the payment process and standardize payment terms
- Pay on approved purchases only

Consideration between either solution includes the question is there a high-percentage of vendors currently paying through the Ariba network. By default, if not through Ariba, then the more robust, broader SAP Vendor Invoice Management (VIM) by OpenText solution should be a consideration.





Michael Carlino

Contact: mcarlino@deloitte.com

Michael Snodgrass

Contact: msnodgrass@deloitte.com

# Thank you.

This publication contains general information only, and none of the member firms of Deloitte Touche Tohmatsu Limited, its member firms, or their related entities (collective, the "Deloitte Network") is, by means of this publication, rendering professional advice or services. Before making any decision or taking any action that may affect your business, you should consult a qualified professional adviser. No entity in the Deloitte Network shall be responsible for any loss whatsoever sustained by any person who relies on this publication.

As used in this document, "Deloitte" means Deloitte Consulting LLP, a subsidiary of Deloitte LLP. Please see [www.deloitte.com/us/about](http://www.deloitte.com/us/about) for a detailed description of the legal structure of Deloitte USA LLP, Deloitte LLP and their respective subsidiaries. Certain services may not be available to attest clients under the rules and regulations of public accounting.

**Copyright © 2021 Deloitte Development LLC.  
All rights reserved. Member of Deloitte Touche Tohmatsu Limited**