

OpenText Extended ECM for: SAP and other applications	
Client Profile	The customer is a large insurance company that insures both individuals and corporates in the areas of personal accident, travel, automobile, home and also a few specialized financial lines. The customer's IT landscape includes S4/HANA and a few insurance domain applications for policy and claim processing.
Problem Statement	The SAP system was underperforming due to the growth of its document content. Also, the customer wanted a uniform approach for storage and lifecycle management of both its SAP and non-SAP business documents which would facilitate meeting compliance requirements and reduce the overall cost of storage and ownership of these documents.
OpenText Products	<ul style="list-style-type: none"> ● OpenText Content Suite ● OpenText Extended ECM for SAP® Solutions ● OpenText Extended Framework
Scope of Work	<p>Implementation of the following OpenText solutions:</p> <ul style="list-style-type: none"> ● Extended ECM for SAP to cover 18 business objects in FI, CO and MM modules ● Records Management for all SAP and non-SAP documents uploaded in the OpenText system ● Integration of OpenText with Core IDIT, Digital and SugarCRM applications using the Extended ECM framework ● Migration of above 10 million documents from existing repositories of leading applications to OpenText

You may find our Case Study rather lengthy, but rest assured that it is filled with relevant details. Do bookmark www.supaiinfotech.com/resources since we regularly update it with useful resources. We look forward to your feedback; please write to us at: csfeedback@supaiinfotech.com. Read on!

Implementation

The project implementation consisted of Requirements collection, Blueprinting and Design, Solution development and deployment, Testing and Training, and Go-live and Support activities.

Workshops and discussions were held with the customer's team to impart knowledge about the OpenText Extended ECM for SAP product suite, and collect and finalize requirements for xECM for SAP for FI, CO and MM modules, and xECM integration with Digital Portal, Core IDIT and SugarCRM applications.

Next, the Blueprint and Design documents were created, reviewed and finalized.

As part of Solution development and deployment, the following activities were performed:

- Configuration of OT products - Content Server (OTCS), Archive Center (OTAC), Directory Services (OTDS), Extended ECM for SAP and SAP add-ons for ECMLink and ArchiveLink:
 - OTCS, OTAC & OTDS were installed in multi-node, load-balanced cluster configurations
- Community, Information and Security (CIS) modelling in OTCS: Design of Business Workspace Templates, Folders, Category metadata, Roles and Groups and Permissions
- Baseline configurations for ECMLink and ArchiveLink, OpenText viewers for SAP.
- Implementation of Fiori apps using Extended ECM Business Object Browsing (BOB) framework for accessing documents present in MM module.
- Development of ABAP Property Providers for the flow of BO metadata and inter-object relationships for 18 BOs present in FI, CO and MM modules.
- Implementing Document Pipeline solution for migrating documents from SAP to OpenText including PERL scripting.
- Mapping SAP security functions with OTCS using advanced mechanisms like Group replacement, Policies, Roles To OTCS Group mapping.
- Extended ECM Framework configurations for the integration of SugarCRM, Core IDIT and Digital Portal applications with OTCS
- Development of REST APIs in OTCS in addition to the suite of APIs already present in the system for consumption by leading applications

Migration of above 10 million documents to OpenText:

Source System	Migration tools used
SAP	Document Pipeline
Core IDIT	REST APIs
Network drives	Object Importer

Implementation of Records Management (RM): Creation of File Plan containing Retention and Disposal Rules for the different document types, RM configurations for Table Maintenance codes, RSIs, Dispositions, Holds, RM Classifications, Workflows for review and approval of record disposal

Development of Reports in OTCS using WebReports for: Tracking and reconciliation of document migration, Estimating department-wise volumes and consumption of storage, Displaying Department-wise accesses to top-level containers, Changing ownership of Personal Workspaces of 'deleted users' to Department Heads

<p>Project Duration and Participants</p>	<p>The total duration of the project from initiation to go-live was 9 months. The customer team comprised their IT Project Manager, Business Manager, SAP functional consultants for FI, CO and MM modules, technical representatives from Core IDIT and SugarCRM applications, and the QA testing team. The Supai team consisted of a Project Manager, a SAP Technical Architect, two SAP ABAP Developers, a Senior OTCS Consultant and two Senior OTCS Developers.</p>
<p>Solution Overview</p>	<ul style="list-style-type: none"> • SAP document types like PO, GRN, Invoice, JV, etc. belonging to FI, CO and MM modules are now stored in the OpenText system. • SAP and OpenText users are able to browse folders, view, add, edit and download documents in the context of Business Workspaces which are integrated and visible within the SAP GUI apart from the OpenText user experience. • SAP users are able to search and find documents based on textual content resident within them as well as their contextual metadata. • SAP users do not have to download documents to view or annotate them; they are able to perform these tasks using OpenText Imaging Web Viewer that is integrated with SAP. • SAP users can also interact with the OpenText system using Fiori applications that are tightly integrated using the Extended ECM framework. • Users of SugarCRM and Core IDIT applications can browse folders and access and operate on their documents like MoU, Invoice, Prospect information, customer onboarding forms and documents, policy and claim documents in the context of their Business Workspaces. • The Digital Portal application which is a customer-facing application was able to fetch documents from the OpenText repository and serve them to the customers. • Records Management classifications, retention and disposal rules are applied to the different document types at the point of creation of the documents in the OpenText system. • Review and Approval workflows determine the path to be followed for disposal of records.
<p>Benefits to customer</p>	<ul style="list-style-type: none"> • The OpenText Extended ECM for SAP implementation provides users with a seamless and intuitive user experience for viewing SAP data along with related documents. Needless to say, the SAP system also performs much better now as its documents are no longer a burden on its database. • Users are able to continue to work within the applications that they are comfortable with. This has saved money and efforts that would otherwise have been spent to train them to use one more application. • The Records Management implementation mitigates legal and regulatory risks by controlling the entire content lifecycle and enabling content integrity and consistency. • Single sign-on eliminates the need to constantly enter login credentials when switching between applications with the help of OpenText Directory Services integration. • OTDS also reduces the maintenance effort to manage users and groups. • The two-way integration offered by OpenText Extended ECM framework has facilitated seamless integration and interaction between the leading applications and OpenText, and has standardised and enriched the user experience. • OpenText Fiori applications have contributed to user adoption of the system.