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PDFs and Emails and Audio Files, Oh My!

Link Unstructured Content to Business Processes with SAP Extended ECM

In the past decade, the world has experienced unprecedented growth in the creation and use of digital media – including audio files, digital pictures, scanned documents, PDFs, presentations, emails, and videos. As organizations realized that these new information trends could help them increase market reach, encourage creativity, and enable collaboration across an increasingly globalized workforce, the business world fully embraced digital media.

However, with this incredible growth came a pressing need to manage all of this unstructured content, which has, more often than not, lived outside of business suite applications. Companies have typically turned to content management solutions to help them handle their unstructured content. But even then, the unstructured content and structured data exist – and are managed – in two separate worlds.

This is no longer enough. In a recent analyst survey of companies with 2,000 or more employees, 54% of respondents agreed with this statement: “We need to be able to link records in our ERP system to documents and email so that we have a complete context of a business transaction for compliance purposes.”

Why is it so important to link unstructured content to back-end systems? Consider, for example, HR departments, which must manage volumes of employment contracts, reviews, and benefits enrollment files. These documents are often physical papers, scans, or Microsoft Word files – all of which must be linked to employee records in the human capital management (HCM) system.

A similar need exists in a customer relationship management (CRM) application, where access to unstructured customer correspondence in the form of emails, attached documents, and faxed paperwork gives customer service representatives all the

information they need to answer questions and most efficiently help the customer, not only saving time, but also improving the customer experience.

To alleviate this unstructured content malaise, the SAP Extended Enterprise Content Management (SAP Extended ECM) application by Open Text provides the efficiency, cost reduction, and compliance that companies expect from a traditional content management solution. But the solution also enables seamless integration with core SAP business processes – an integration that companies have actively been searching for (see **Figure 1**).

SAP Extended ECM: Features and Benefits

SAP Extended ECM is a complete enterprise content management solution that is optimized to integrate deeply with your SAP landscape. With this application, unstructured content of any sort can be managed throughout its life cycle. More importantly, the content can be associated with any SAP transaction or object.

Because SAP Extended ECM provides this crucial link between unstructured content and business



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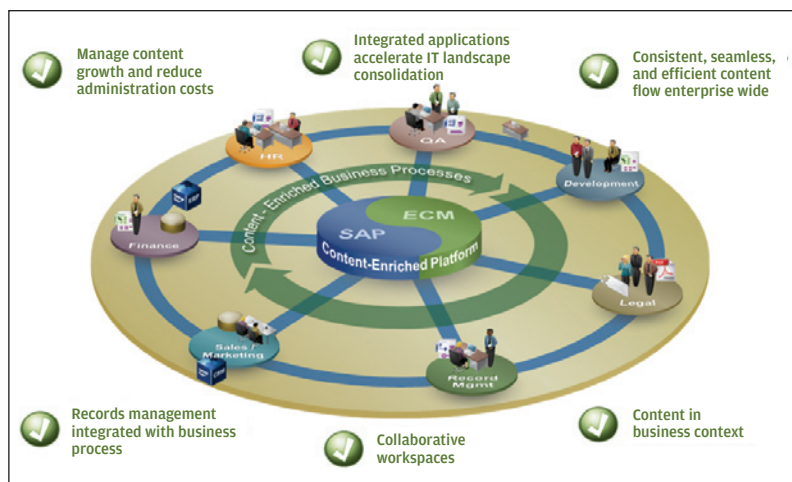


FIGURE 1 ▲ SAP Extended ECM improves business process efficiency and mitigates legal compliance risk

suite applications, the value of an organization's content drastically increases as it gains relevance, which is provided by the context of the business process that the content supports. Integrating SAP business processes with the content gleaned from the ECM solution solves a number of problems and brings key benefits:

- With SAP Extended ECM, content from the ECM platform is connected to SAP enterprise applications, eliminating the need for additional repositories and simplifying the IT landscape.
- Managing content with an ECM platform brings great operational benefits. The company can control document versions, streamline collaboration, and archive or destroy content – all of which help manage the volume of information and remove old and inaccurate information from within production systems.
- With an ECM platform, content is easily accessible across the enterprise. The solution gives users with the correct access rights 360-degree visibility into transaction-related content.
- The solution associates transaction metadata with each piece of managed content, allowing users to determine which business process connects to the content. This means that a work order, a quote, a contract, or photos from an industrial accident, for example, are all clearly associated with both a business process and a

transaction so that users can properly determine the content's importance.

- The solution's content management collaboration tools – such as shared workspaces, approval workflows, discussions, projects, tasks, forums, and notifications – enable collaboration across organizational silos.
- Since this DoD 5015.2-certified ECM solution also easily integrates with records management functionality, organizations can be certain that they retain relevant documents for the required amount of time – ensuring regulatory compliance and reducing legal risk.

Enriching business processes with content ensures that both unstructured content and structured data remain relevant to a business owner. This can be especially important from an industry perspective, since many industries have unique needs to integrate certain unstructured content within their enterprise application landscape.

For example, utilities, oil and gas, manufacturing, and construction companies must track engineering documents, maintenance records, safety data, and facilities plans – all of which are unstructured content – as part of their compliance requirements.

Similarly, healthcare and pharmaceutical companies must keep records of patient files, clinical trials, and research data to ensure compliance and litigation preparedness.

Let's take a deeper look at one industry in particular – the professional services industry – to see how well-integrated content can help project and engagement managers bring value to their clients, even under increased cost pressure (see **Figure 2**).

ECM in Action: A Professional Services Industry Example

More than any other industry, the professional services field relies heavily on information workers – and these workers depend on having efficient access to quality information (see sidebar). Oftentimes, though, these workers – who are spread across various time zones, cultures, and geographies – waste valuable time searching through content scattered across myriad applications that are not linked or designed to share information among project members.

To this end, enabling team members to collaborate from within existing applications is critical. But it's just as important to do so without requiring workers

One of SAP Extended ECM's greatest strengths is its ability to give business relevance to unstructured content.

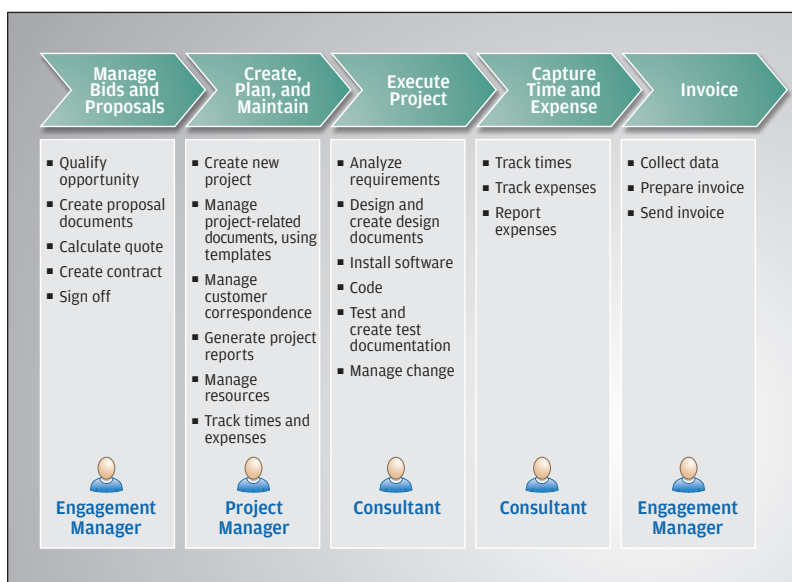


FIGURE 2 ▲ The engagement lifecycle phases typical of a company in the professional services industry; SAP Extended ECM can support these phases

to learn new interfaces or go through application training, since time-to-market and time-to-revenue are such core key performance indicators (KPIs) for the professional services industry.

What's more, because the majority of team communication among information workers occurs through email, these email messages contain not only project-relevant content, but also key information for an audit trail. Without ECM, companies can't reliably connect this information to their business applications or processes. The result is a lack of collaboration that reduces revenue potential, cost control, and compliance readiness.

Addressing all of these challenges may seem like a tall order – but using an ECM solution, companies can bring them all within reach.

One Dashboard for All Relevant Professional Services Content

SAP Extended ECM easily integrates with back-end SAP systems and pulls both structured and unstructured content into one, integrated dashboard. This provides project workers and project managers in the professional services industry with a transparent way to trace and document all content that relates to a current project.

Users can access this holistic content view through the SAP system's user interface (UI) or from the SAP Extended ECM application's own Web-based UI. And since SAP Extended ECM tightly integrates with the Microsoft Office suite of applications and with SAP's project system (PS) and sales and distribution (SD) capabilities, users get a complete view of all collaborative communication related to their projects, thereby linking disparate teams and their content.

From a cost control perspective, SAP Extended ECM can help firms eliminate worker inefficiencies, reduce storage costs, reduce legal discovery costs, and increase project ranking and visibility. But overall, one of SAP Extended ECM's greatest strengths is its ability to give business relevance to unstructured content, meaning that your holistic view of data will focus on the information you actually need.

A Specific Use Case: Making Email More Relevant to a Business Process

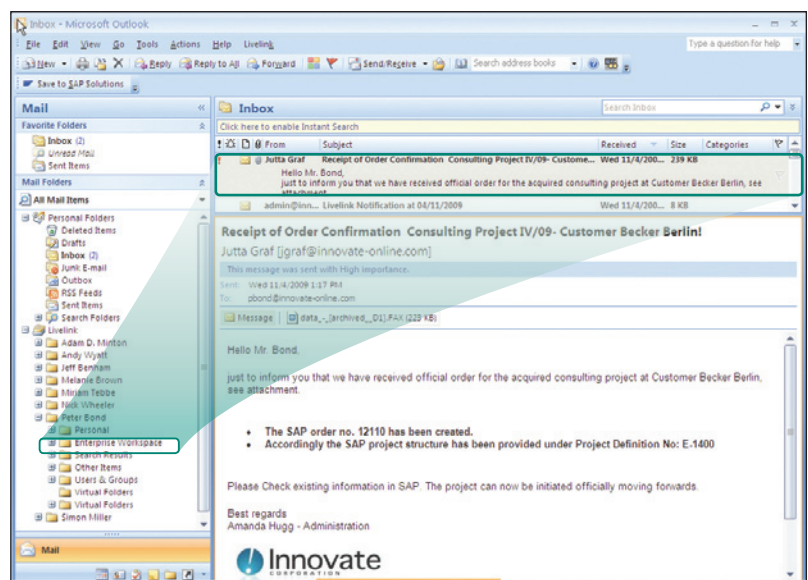
Consider a professional services firm that wants to map and cross-reference unstructured content – an

Current Information Trends in the Professional Services Industry

A variety of forces are shaping the professional services industry:

- Increasingly sophisticated clients
- Market globalization
- Modularization of business processes and technology

In light of such external and internal pressures, professional services firms need to provide a frictionless flow of information across their global engagements. They need to componentize processes so that they can plug in offshore services and specialized expertise, and they need to improve efficiency so that they can more quickly innovate new delivery models and service opportunities.



email related to an audit project, in this case – to make it more relevant to a business process. The firm is using SAP Extended ECM.

First, a project manager will need to define the audit project's master data – including client and billing information – in SAP's project system component. Based on this master data, SAP Extended ECM will automatically create a corresponding project workspace.

Then, the project team – no matter where its members are located – can manage documents and correspondence related to that project within this workspace, all in the context of an SAP transaction. This transaction associates the content with SAP's metadata, defining its relationship with the SAP business object.

SAP Extended ECM also integrates with Microsoft Outlook. **Figure 3** shows how the project manager can use the Microsoft Outlook folder structure to

FIGURE 3 ▲ SAP Extended ECM integrates directly with Microsoft Outlook, enabling users to simply drag and drop emails into a shared Enterprise Workspace folder

store an email from a project teammate (about their Becker Berlin project, in this example) in SAP Extended ECM's Enterprise Workspace correspondence folder with easy, drag-and-drop functionality. This allows anyone working on the Becker Berlin project to see the correspondence, thus creating a dynamic environment for sharing content.

The project manager can also access the email from an SAP UI or directly from SAP Extended ECM. In addition, any users who have permission to view this email – such as project teammates – can do so from a multitude of UIs (see **Figure 4** and **Figure 5**).

This gives workers across a business process or project the ability to collaborate more easily, enabling

them to access common content framed by the context of an SAP business process or transaction.

Making Records Management Part of Your Project Process

This professional services example also highlights how records management can be added as a transparent part of the business process. SAP Extended ECM's integration with a company's records management solution allows SAP Extended ECM to leverage SAP metadata to generate automatic classification and data retention schedules. This means, for example, that:

- Records (both physical and electronic) are captured automatically and require no end-user participation to assign records classification, although end users are still responsible for entering the content into the system – by dragging and dropping an email, for example
- All content created during the business process can be managed throughout its life cycle from creation to deletion
- SAP metadata is used to drive retention schedules and determine content's classification
- Companies will have an enterprise records management solution that can now include SAP unstructured content
- Firms can easily and transparently demonstrate their governance and compliance practices

It's important to note that this records management is a transparent step in managing an organization's content – and this is how most organizations prefer it. They don't want end users to be responsible for selecting the correct records classification.

Conclusion

Managing all of the content that's streaming through your enterprise – whether it's a structured SAP transaction or an unstructured email – within one UI is critical for companies looking to increase communication efficiency, enhance business processes, and minimize legal and compliance risk. As our professional services industry example demonstrates, SAP Extended ECM supports all of these business benefits, with the added bonus of being easy to learn and use.

To learn more, visit <http://ecohub.sdn.sap.com/irj/ecohub/solutions/ExtendedECM>. ■

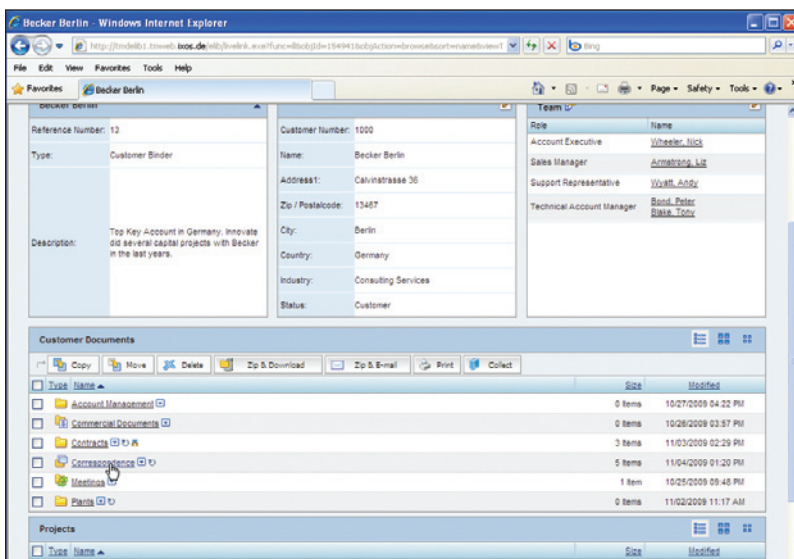


FIGURE 4 ▲ Through the SAP Extended ECM UI, all project team members can view relevant contact details and project-related correspondence

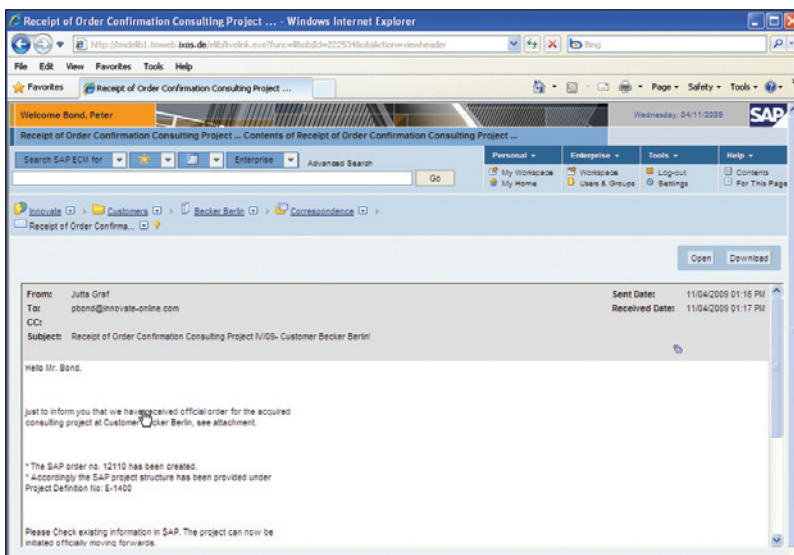


FIGURE 5 ▲ An email from our example project as seen through SAP Extended ECM's Web-based UI