Collaborative Partner Exchange for Documentum
It was about 4 years ago when I attended the AIIM Conference in San Diego (USA) and learned about Gen Z, during a keynote from Tom Koulopoulos. Together with Dan Keldsen, he wrote a book called ‘The Gen Z Effect’, which talks about the six forces that will shape the future of business. One of the lessons I learned as a late baby boomer / early member of generation X was, that the kids from Gen Z have fundamental different believes about solving business challenges with their personal network of experts. Access to knowledge for them doesn't stop at corporate brick-and-mortar limits.

Industries like Life Science and Energy & Engineering are known for working with external partners. They know that they don't own all the knowledge nor have the economics to work with only internal staff. Yet, regulations don't allow them to go ‘all the way’ like their Gen Z staff would like to do.

They apply what I call Judo-tactics: In short, adjusting to and evading your opponent's attack will cause him to lose his balance, his power will be reduced, and you will defeat him. This can apply whatever the relative values of power, thus making it possible for weaker opponents to beat significantly stronger ones. This is the theory of ju yoku go o seisu.

How does that translate to information management? Provide an environment where Gen Z can collaborate in a controlled way with their extended network as partners. Give them freedom in Office 365 under information governance of Documentum.

Bringing OpenText Documentum and Microsoft Office 365 together as a technical trick, is what Informed Group delivers through their SharePoint Add-in for Documentum (SPA4D). It then becomes easy to deliver all kinds of scenario’s that leverages best of both worlds.

But we went the extra mile. With Collaborative Partner Exchange for Documentum (Collaborative Partner Exchange) we deliver a business solution on top of SPA4D. A product that implements Connecting People to the Enterprise. A product that allows users of the extended enterprise to work with controlled documents inside Documentum.

In this flyer we share the highlights of this new product. Enjoy reading it!

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Collaboration goes beyond enterprise walls, Embrace it, Don’t Fight it

— Jeroen Jansen, CEO

Ed Steenhoek
Product Manager
What are the characteristics of Collaborative Partner Exchange

Collaborative Partner Exchange for Documentum (Collaborative Partner Exchange) is a business solution that leverages the technical capabilities of Informed’s SPA4D (SharePoint Add-in for Documentum) platform. The add-in runs inside the Office 365 / SharePoint environment and behaves like any SharePoint Add-in. It provides access to the information in Documentum through a DFS (Documentum Foundation Services) environment. This architecture is independent of the location of the elements. Typical scenarios include: cloud, hybrid, and on-premise.

Controlled
Create a new content upload location that is under quality control. Use a browse app-part for access to selected content through property values (DQL) or location (folder). Honour Documentum security and lifecycles. Use the search app-part to let them find authorised content using SharePoint facets.

Quality Control
Only content that meets your quality standards will be stored in the Documentum environment. The partner flags the content to be ready for review. Your quality officer picks up from there. After the check, content can safely be transferred into Documentum.

Isolation
Work with as many partners as you like but keep their working folders separated. Enrich these folders with read-only content to provide context relative to that individual partner. Or with editable content that only they should edit. All without these partners ever working in Documentum.

Automation
Give partners freedom to work with documents that have content types that they understand with only the meta data that is relevant. Upon transfer you can automatically transform this content into your DocTypes with required metadata enhancements (convert, skip or add) and other business rules that make it 100% genuine Documentum content.

Ease of Use
Technology has become a commodity to users. They expect certain behaviour, certain usage comfort. With the BYOD-wave, the expectation from users has increased to a level that is very well understood by Microsoft Office 365. That experience is now also available for Documentum content.

Expandable
Because no Documentum implementation is the same, it is possible to expand the product to neatly fit any environment. Include it in an xCP process. Include it in a D2 workflow. Include it as part of the Life Science industry solution.
How to set-up a Collaborative Partner Exchange environment

Collaborative Partner Exchange allows organisations to work with partners in a controlled collaborative environment with access to Documentum controlled content without the need to allow the partner to access the Documentum UI and with the ability to use all the collaborative functions that Office 365 offers.

The Workspace
Create a SharePoint / Office 365 environment in which the app-parts are added, that support your collaboration needs with a partner. Select one or more of the following app-parts:
- Browse app-part based upon a folder or a DQL
- Inbox app-part for actionable Documentum workflow tasks
- Search app-part to find and filter security trimmed results
Combine this with a native SharePoint / Office 365 upload folder and review workflow.

The Rules
Define which collaboration features included in Office 365 / SharePoint can be used by the partner.
Define how transfer into Documentum is executed:
- Based upon partner controlled metadata values,
- After a quality check triggered by metadata values.
Define how the content files and its attributes are mapped between the SharePoint / Office 365 content types and the Documentum doctypes.

The Freedom
Collaborative Partner Exchange can live next to any other functionality you need in the partner environment. This includes other solutions that our SPA4D platform can provide like Collaborative Edit. And, of course, it does support upload libraries using no content types or strict content types, further automation using Flow or Power Apps. You can even provide your partners with contentless placeholders for which they only need to upload the actual content.

The Documentum Side
Collaborative Partner Exchange works with any recent Documentum version on-premise, in your (private) cloud, the OpenText hosted solutions and anything in-between. What Collaborative Partner Exchange needs is a DFS (Documentum Foundation Services) instance to talk to. DFS is responsible to connect with the Documentum Server behind it.

Due to this modular architecture, it is safe to connect an on-premise Documentum instance with Office 365. You only need a DFS instance in your DMZ between the outside internet and your internal network.

The Office 365 Side
When using Collaborative Partner Exchange in the context of Office 365, all is already in place to start using it. We offer Collaborative Partner Exchange as a subscription service using Microsoft Azure.

But on-premise or cloud-based instances of SharePoint 2016, SharePoint 2019 and SharePoint Online are also supported. In some of these cases, the Office Online server (also known as OWA or WOPI server) provides additional benefits.

For the many ways to use Office 365, we offer Professional Services to deliver the benefits of Collaborative Partner Exchange.
Collaborative Partner Exchange is a business solution on top of the SharePoint Add-in for Documentum platform.

How do you manage the ever-growing amount of information in a world that requires more and more control over your information processes? The Cradle-to-Grave concept offers you the solution. Implementing this concept, puts your organization in control from the moment content is created until it is no longer needed. This can be done through a single solution (e.g. Office 365 or OpenText Documentum) but also by combining Office 365 and OpenText Documentum through our SharePoint Add-in for Documentum (SPA4D) platform in general or the more specific business solutions like Collaborative Edit or Collaborative Partner Exchange.

With SPA4D, you can implement the Cradle to the Grave concept for all your content by combining the best of Documentum and SharePoint. The content is controlled by Documentum’s powerful Document Management, Records Management and Advanced Case Management as well as the familiar user experience of SharePoint and Office 365. Users can easily create, edit, share, review and approve information within SharePoint. At the same time the information is stored and controlled in Documentum. This way, all the business rules from Documentum are applied ensuring that processes, permissions, lifecycles and workflows, configured in Documentum, are fully respected through SPA4D.

More and more people want to work using easy tools that can run on their computers but also on mobile devices like an iPad or a Surface. SPA4D has an easy to use and understandable interface that blends with the Microsoft Office experience, and also supports touch-enabled devices. Some users might find it difficult to find information, for example because they are not very familiar with the information governance structures. With the highly configurable search of SPA4D, these and all other users can use both keywords and predefined metadata options to find the information they are looking for and drill down further using filters and facets to locate the information. Together with our preview functionality you can easily find what you are looking for.

Beside the standard apps of SPA4D, like the Browse App-part (to view and edit documents), the Inbox App-part (to view and finish tasks) and the Search App-part, we also have a case management dashboard and dedicated support for Life Science (SPA4LS) with e.g. a “To Be Read” (TBR) sign-off. All of this can be used in an on-premise installation of SharePoint (2013, 2016 and 2019), but also in the cloud using Office 365 or in a hybrid installation of SharePoint.
Why Choose For Informed Group

In 2006, Informed Group started as Informed Consulting and has ever since been helping its customers successfully implement information management solutions based on Documentum (OpenText) and Office 365 / SharePoint (Microsoft). We have a track record with customers in 20+ countries with a team of 35 – mainly senior – proven professionals and a network of 20 qualified freelance consultants. With over 100 successfully delivered projects, we are experts in Intelligent Information Management.

OpenText Documentum Partner

Informed Group is one of the largest OpenText partners in Europe and is the to go to EMEA partner to implement solutions in the SMB Life Science industry. Integrating Documentum and Office 365 is a speciality.

Microsoft Office 365 Partner

Informed Group uses Office 365 on its own or in combination with Documentum. And always to support user adoption in scenarios that connects people and enterprise needs.

Our mission is about building bridges between business processes and users: Connecting People to the Enterprise

AIIM Leadership Council EMEA

Informed Group is an active member of the AIIM Leadership Council in EMEA. We value the expertise of AIIM when looking at what the future Intelligent Information Management brings.

Young Professional Academy

With every organization we share the demand for talent. Our approach: hire graduates and learn them our trade based upon our values and experience with practical examples. This academy is open to customers as well.

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Added value is created from experience and educating ourselves during internal research and many conferences.

DOLSR: Our Private Cloud

Documentum was created on the demands of regulated industries: Aviation and Life Science. Its Life Science Solution implements the DIA eDM reference model. DOLSR is the only offer of this industry solution, that is tailored to the needs of SMBs.

EIM Products

Other Enterprise Information Management products available from Informed Group are: Collaborative Partner Exchange, SPA4D, SPA4LS, EQMS Express and the Meta Data Publishing Tool.

Visit www.informedgroup.com for more information about our products and blog posts of our consultants.
Kuna van der Kolk
Senior Account Executive
+31 (0) 6 29 71 23 67
kuna.van.der.kolk@informedgroup.com

Tom Staes
Sales Manager BeLux
+32 (0) 468 544 916
tom.staes@informedgroup.com