

Work smarter not harder

Alexander Beyer, CEO complon
OpenText Enterprise World
Vienna, March 13th 2019

Ready to Run xECM Business Solutions for Sales, Procurement and Service



Who we are



Experienced

Founded in 2009 (spin off from Siemens)
German ECM Consulting and Solution company
+20 years of experience in global EIM projects



Specialized

xECM Solution Consulting for Sales, Procurement,
Service, Contract Management, Capital Projects



Certified

Business Partner & Cooperation:
OpenText, Salesforce, SAP
BME e.V. (Association for Supply Chain
Management and Logistics)



Trustworthy

Flexible, always at hand

The difference: Why complon Business Solutions

Extended ECM Platform*

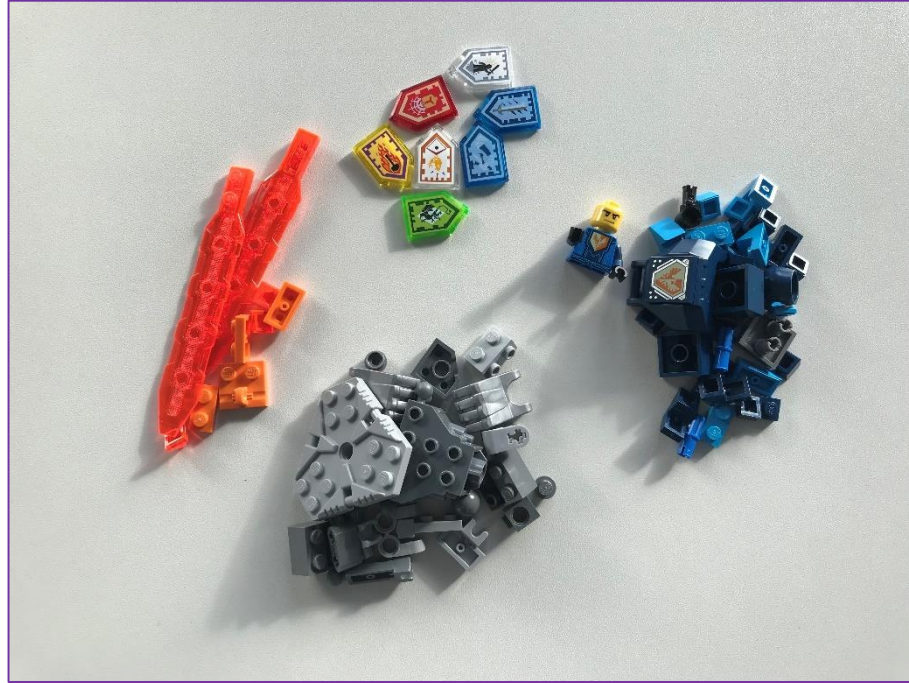


Market leading, standard, flexible Content Services platform with proven 3rd party integration

*) opentext™

The difference: Why complon Business Solutions

Solution Accelerator*



Implementation samples for selected stand alone Use Cases, PoC, Test

*) opentext™

The difference: Why complon Business Solutions

complon®
xECM Business Solutions

- Best Practice Process Solution
- modular
- productized
- end-to-end digital
- faster in familiar use



What are complon xECM Business Solutions?

complon® xECM is a Partner Solution Suite based on OpenText Extended ECM which enables

- Quick implementation
- Best practice process templates
- Ensuring compliance and security aspects



complon xECM Business Solutions



Sales



Procurement



Service



Contract

Business Solutions

End-to-End Process Support



Engineering



Projects



Quality



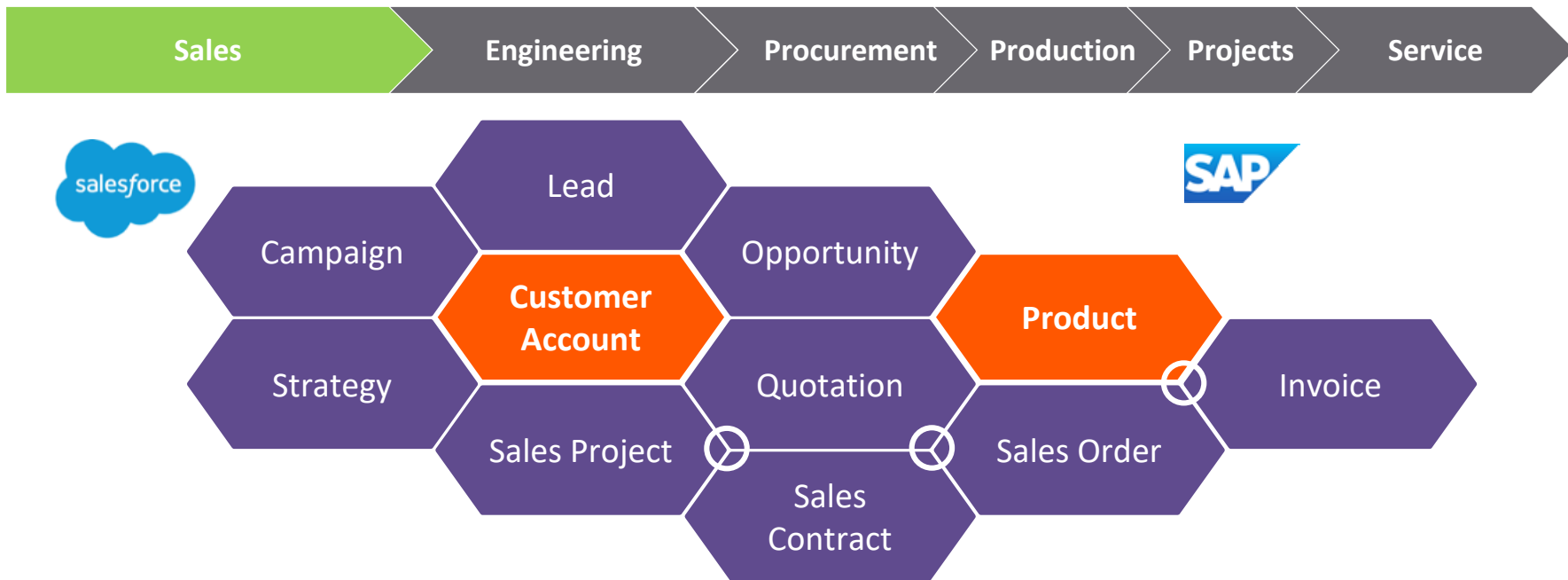
Logistics

Basic Solutions

Single Process Support

complon® xECM Sales Record bridges the CRM to ERP Gap co

connected documentation flow from Go-to-market strategy to Order to Pay



complan® xECM16 Business solution for Sales (Customer Record)

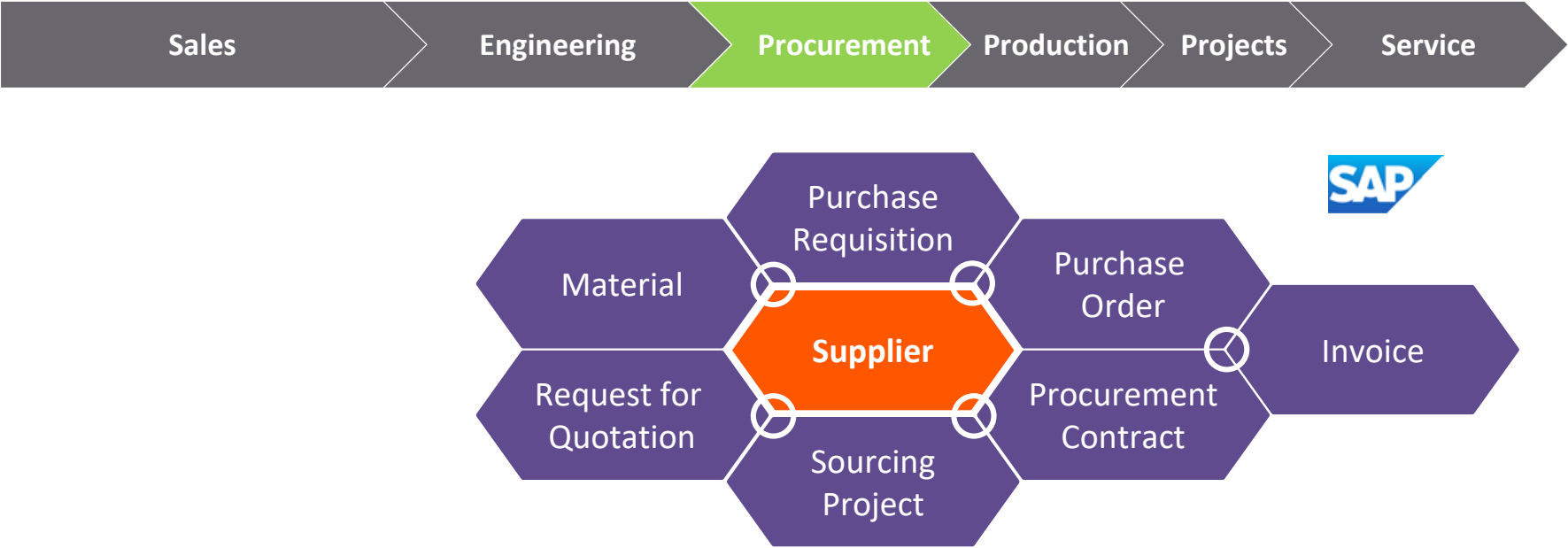
 connected Business Workspace  Master Data Record Business Workspace

Work smarter not harder complon® xECM Business Solutions for SAP and Salesforce, OTEW 2019, copyright © complon GmbH 2019. All rights reserved



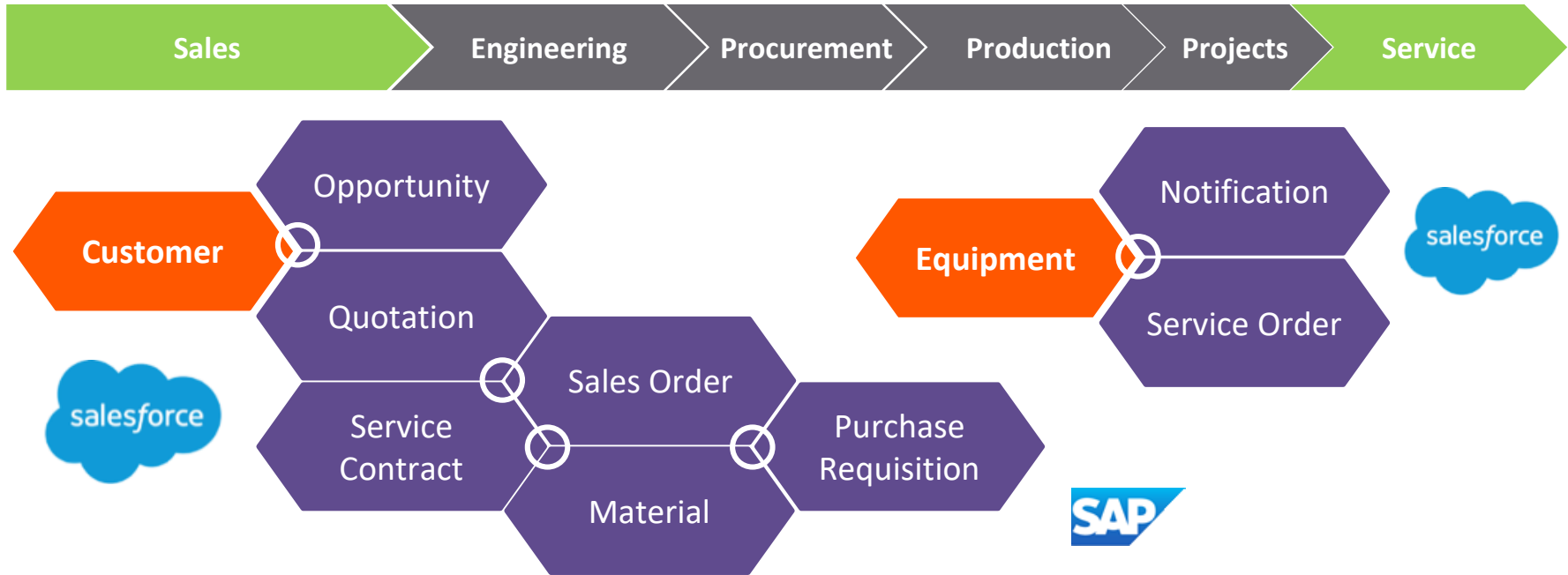
complon® xECM Procurement Record

connected documentation flow from Source to Contract to Purchase to Pay



complon® xECM Service Record

connected documentation flow from Customer Notification to Service Order



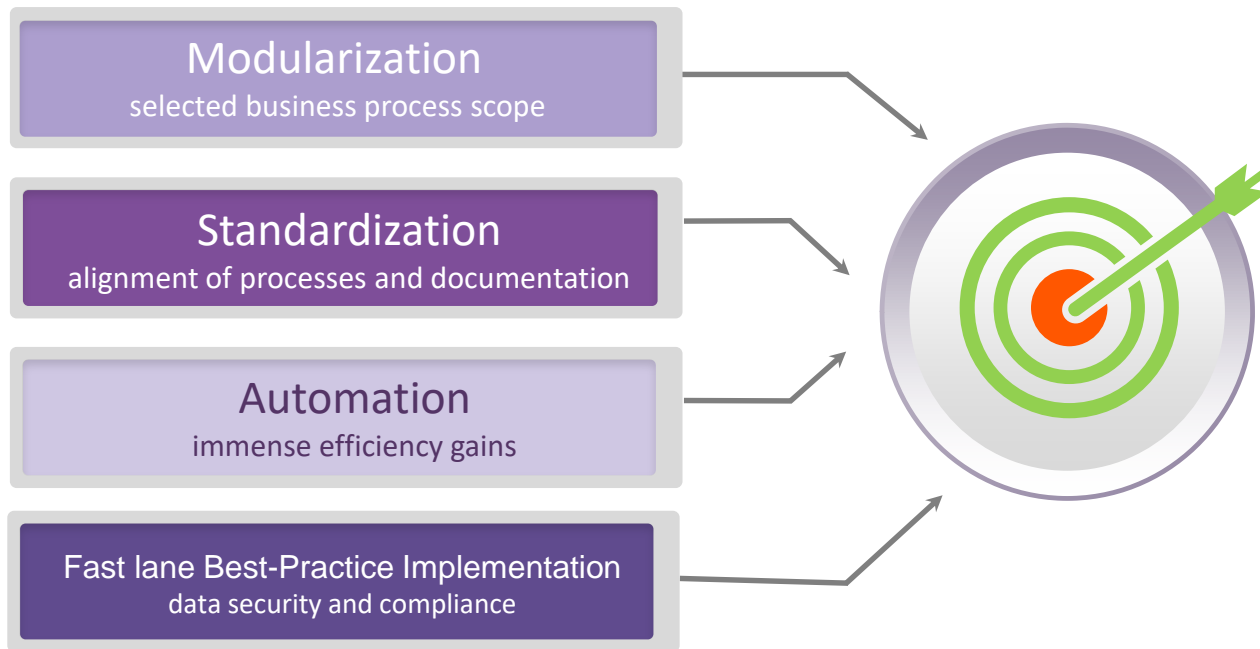
complon® xECM16 Business solution for Services (Service Record)

connected Business Workspace Master Data Record Business Workspace

Experience – Higher Sales and Customer Satisfaction



Benefits of complon® Business Solutions



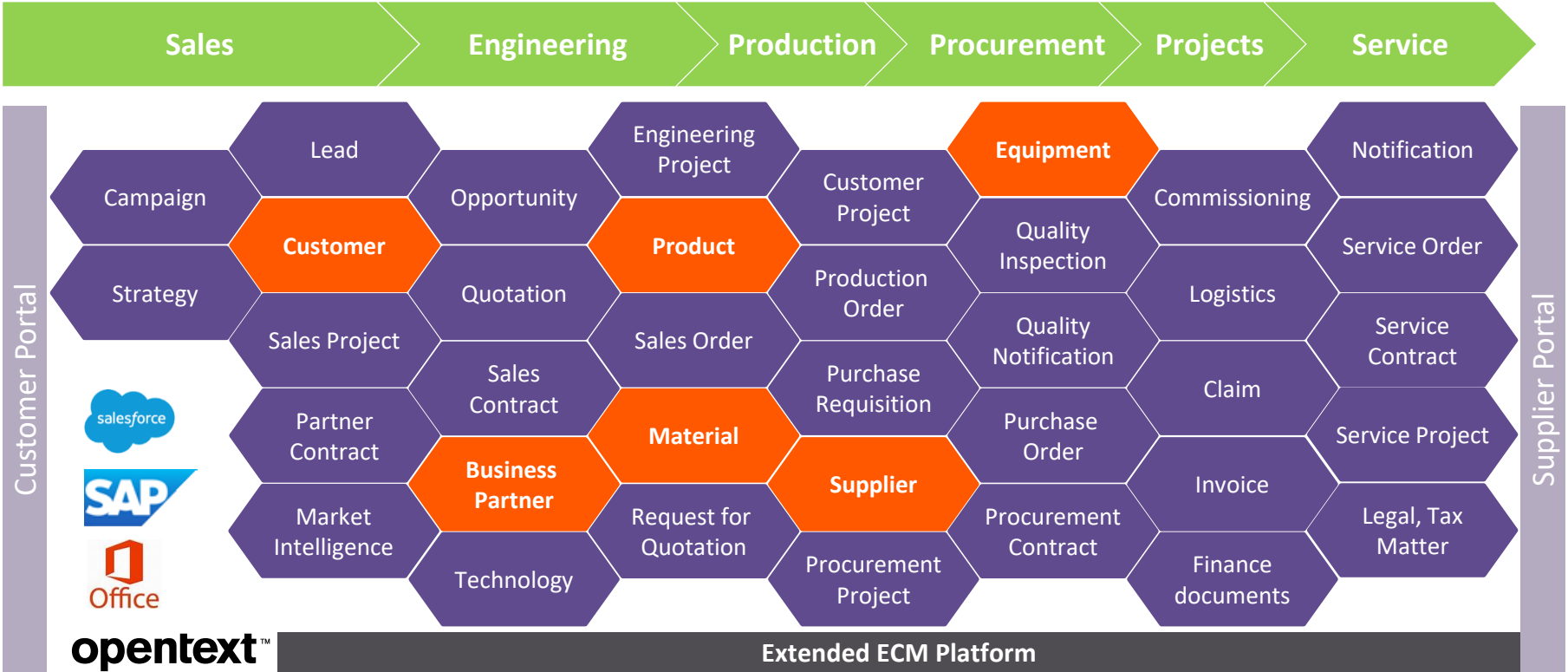
SALESFORCE®
+ SAP®
+ MICROSOFT®
+ COMPLON®
+ OPENTEXT™

END-TO-END
DIGITALIZATION



An End-to-End Digitalization Experience

complon® xECM16 Business Solutions combined (40+ Business Workspace types)



Time for a Demo



Procurement



Service



Contract

Business Solutions

End-to-End Process Support



Engineering



Projects



Quality



Logistics

Basic Solutions

Single Process Support

Customer Account Workspace embedded in Salesforce



Account
Paulsen Plants

[+ Follow](#) [Edit](#) [Change Owner](#) [Delete](#)

Type
Customer - Direct

Phone

Website
<http://tiny.cc/paulsen-plants>

Account Owner
[Sam Seller](#)

Account Site
HQ & Production Site

Industry
Construction

Details

Attachments

Related

Perspective

OpenText Workspace

Paulsen Plants (0000090 | 1008324) Customer Workspace

Type	Name	Size	Created
00 Customer Correspondence external		0 items	04/12/2018 9:49:11 PM
00 Customer Correspondence internal		1 item	04/12/2018 9:49:12 PM
10 Customer Information		0 items	04/12/2018 9:49:10 PM
20 Account Management		2 items	04/12/2018 9:49:10 PM
30 Sales Activities		0 items	04/12/2018 9:49:11 PM
40 Meeting Reports, Protocols		3 items	04/12/2018 9:49:11 PM
50 Self Disclosure		1 item	04/12/2018 9:49:11 PM
905 Leads		0 items	04/12/2018 9:49:12 PM
910 Cases, Notifications		5 items	04/12/2018 9:49:12 PM
920 Opportunities		11 items	04/12/2018 9:49:13 PM

Activity

Chatter

Email

Write an email...

Compose

Filters: All time · All activities · All types

Refresh Expand All

Next Steps

Coordinate onsite Sales AND Service workshop

You have an upcoming Task

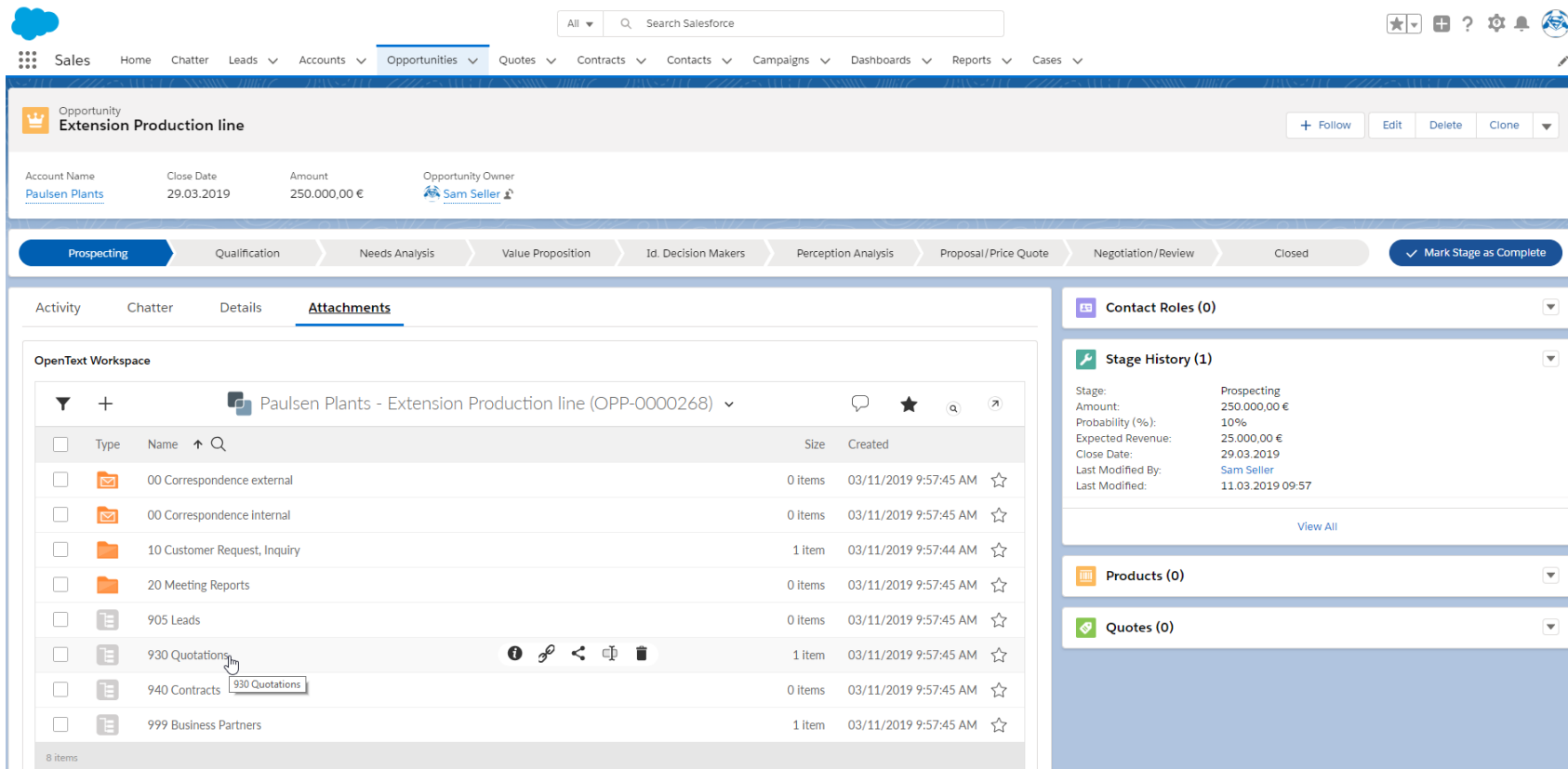
15.03

Past Activities

No past activity. Past meetings and tasks marked as done show up here.

Load More Past Activities

Opportunity Workspace embedded in Salesforce



The screenshot displays the Salesforce Opportunity Workspace for the 'Extension Production line' opportunity. The interface includes a top navigation bar with tabs for Sales, Home, Chatter, Leads, Accounts, Opportunities, Quotes, Contracts, and Reports. The 'Opportunities' tab is active, showing a list of opportunities with columns for Account Name, Close Date, Amount, and Opportunity Owner. The 'Extension Production line' opportunity is selected, showing details for Account Name (Paulsen Plants), Close Date (29.03.2019), Amount (250.000,00 €), and Opportunity Owner (Sam Seller).

The main workspace area is divided into two sections. The left section, titled 'OpenText Workspace', shows a list of attachments for the selected opportunity. The right section, titled 'Attachments', shows a list of attachments for the selected opportunity. The 'Attachments' section includes a table with columns for Type, Name, Size, and Created. The table lists several attachments, including '00 Correspondence external', '00 Correspondence Internal', '10 Customer Request, Inquiry', '20 Meeting Reports', '905 Leads', '930 Quotations', '940 Contracts', and '999 Business Partners'. The '930 Quotations' attachment is highlighted, and a tooltip shows '930 Quotations'.

The right sidebar contains several sections: 'Contact Roles (0)', 'Stage History (1)', 'Products (0)', and 'Quotes (0)'. The 'Stage History (1)' section shows the current stage as 'Prospecting' with details for Amount, Probability, Expected Revenue, Close Date, Last Modified By, and Last Modified.



Business solution for Services (SAP GUI, ERP 6.0, S/4 HANA) complon

The screenshot shows the SAP Service Notification business workspace. A menu is open, highlighting 'Business Content Window'. The workspace includes fields for 'Additional Data' (Reported by, Date, PO number, Sales Doc.), 'Reference object' (Equipment, Serial Number, Material, Device data), 'Subject' (Damage, Description), and 'User Data' (Cust. group, Software rel., Handling time, Kind of contact, notif. root). The description field contains a text entry dated 16.04.2008.

Service notification Edit Goto Extras Environment System Help

Display Service Notification: Service notification

- Create...
- Attachment list
- Business Content Window**
- Private note
- Send
- Relationships
- Workflow
- My Objects
- Help for object services

Additional Data

Reported by: [] Date: 16.04.2008

PO number: [] Sales Doc.: 0

Reference object

Equipment: 1010267

Serial Number: 764 Material: 00100051

Device data: 99C2E

Subject

Damage: CS-PROD 2 Users mistakes

Description: Problem friction

16.04.2008
Stopp vor Überschreitung Überwachungsraum Nr., Kunde hat Die modellierten Kugeln am Werkzeug auf 80mm eingestellt. Beim verfahren mit 20% OV kommt die Meldung+Stopp nicht aber chon bei 30% OV obwohl er noch ca. 80cm zur Raumgrenze hat.
An Grenzen stoppen auf => False

User Data

Cust.group: E Kind of contact: TELEFON t...

Software rel. notif. root: KUNDE cus...

Handling time: 00:25:00

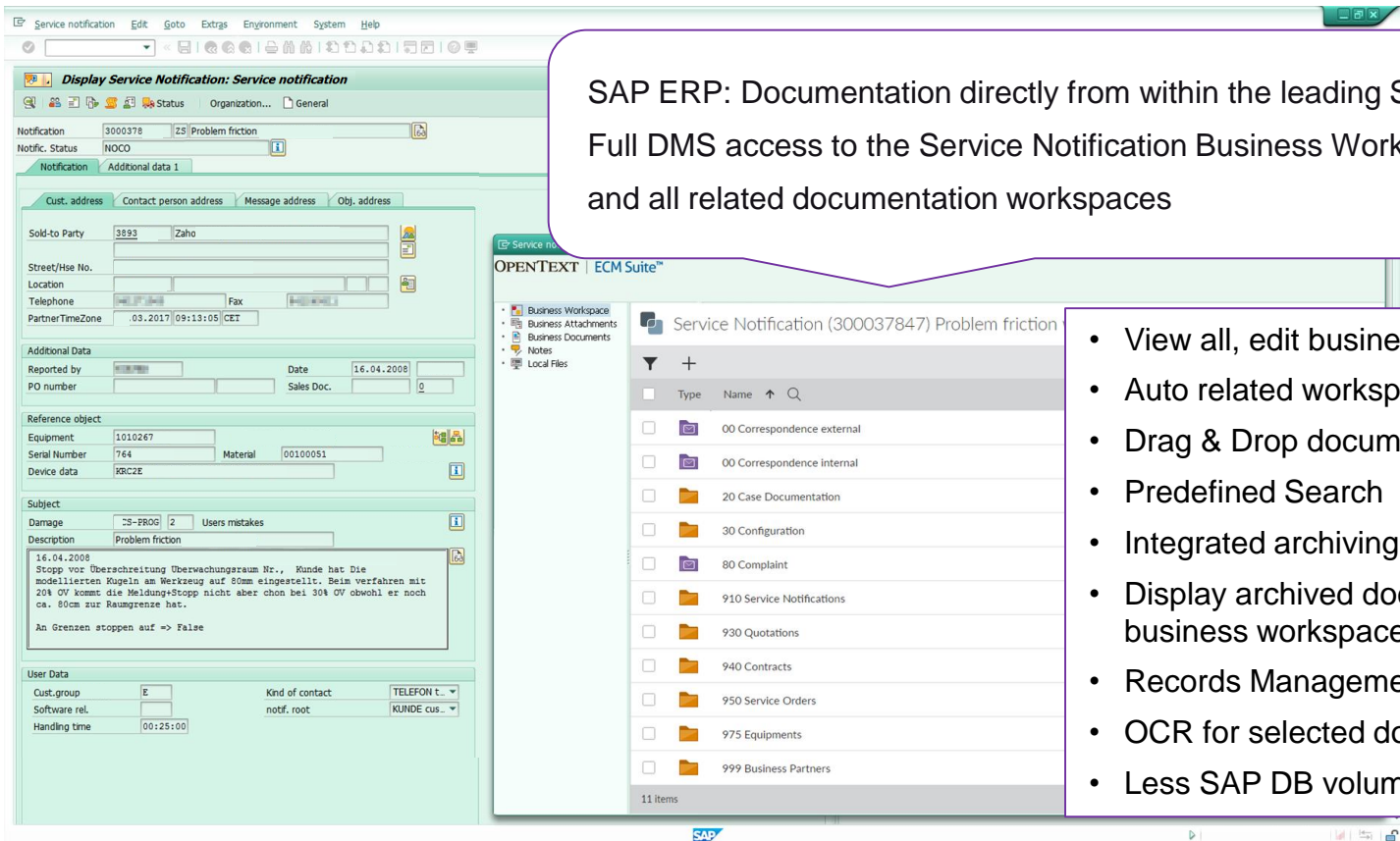
Could not determine any superior object

SAP ERP: Service Notification business workspace is created fully automated from template when Notification is saved in SAP

Users access the Business Workspace from the GOS menu

complon® xECM Business solution property provider for SAP with x-application References to Business Partner, Service order in SAP or in Salesforce Service Cloud

ECM integrated in SAP e.g. Service Notifications



Display Service Notification: Service notification

Notification: 3000378 ZS Problem friction
 Notific. Status: NOCO

Notification Additional data 1

Cust. address Contact person address Message address Obj. address

Sold-to Party: 3893 Zaho
 Street/Hse No.:
 Location:
 Telephone: Fax:
 Partner/TimeZone: 03.2017 09:13:05 CET

Additional Data

Reported by: Date: 16.04.2008
 PO number: Sales Doc.:

Reference object

Equipment: 1010267
 Serial Number: 764 Material: 00100051
 Device data: 30C2E

Subject

Damage: ZS-PROG 2 Users mistakes
 Description: Problem friction

16.04.2008
 Stopp vor Überschreitung Überwachungsraum Nr., Runde hat Die modellierten Regeln am Werkzeug auf 0cm eingestellt. Beim verfahren mit 20% OV kommt die Meldung+Stopp nicht aber schon bei 30% OV obwohl er noch ca. 60cm zur Raumgrenze hat.
 An Grenzen stoppen auf => False

User Data

Cust.group: E Kind of contact: TELEFON t.
 Software rel. notif. root: KUNDE cus.
 Handling time: 00:25:00

SAP ERP: Documentation directly from within the leading SAP application GUI
Full DMS access to the Service Notification Business Workspace and all related documentation workspaces

Service Notification (300037847) Problem friction

Business Workspace
 Business Attachments
 Business Documents
 Notes
 Local Files

Type Name

- 00 Correspondence external
- 00 Correspondence internal
- 20 Case Documentation
- 30 Configuration
- 80 Complaint
- 910 Service Notifications
- 930 Quotations
- 940 Contracts
- 950 Service Orders
- 975 Equipments
- 999 Business Partners

11 Items

- View all, edit business documents
- Auto related workspaces
- Drag & Drop documents
- Predefined Search
- Integrated archiving of documents
- Display archived documents in business workspace
- Records Management Rules
- OCR for selected document types
- Less SAP DB volume

Landing Pages in xECM Smart UI (by business role)

Sales Representative Dashboard



Favorites

Paulsen Plants (0000090) Customer Workspace

Paulsen Plants - Extension production line IIR42 (OPP-...

Paulsen Plants - Extension Production line (OPP-0000...

Paulsen Plants - Storing and Filtering for European soil...

Recently Accessed

PP_Partner Agreement (00001712).DOC

Project Contract - 2019-03-11 (00001715)_DRAFT.DOCX

2019-03-10 - Paulsen Plants - Automatisierung Einzelfertigung Mi...

Quote 20000046.docx

RIQ AUTO PROD SingleMix.pdf

2019-03-10 - Paulsen Plants - Automatisierung Einzelfertigung Mi...

2017-12-14 - complon GmbH - KR 30 Agilus Update (OPP-00433...

Account Business Plan.docx

Self Disclosure.pptx

Client 00001603_X580.docx

Search Customers

Search Terms

Add text

Created By

Add user or group

Business Partner Name

Add text

Account Number (Salesforce)

Add text

Company Code

.....

Search

Workflow Tracking

5
Total

2 On time


3 Completed


Reminder for today


#	Type	Object	Reminder Type	Status	Reminder	Due Date	Description
1.		Paulsen Plants - Automated transportation of PreformCaps (OPP-0000246)	Basic Reminder	In Progress	2018-11-15	2018-11-15	follow-up with customer procurement team
2.		Account Business Plan.docx	Basic Reminder	Active	2019-03-08	2019-03-10	Review and update of ABP
3.		Paulsen Plants - Storing and Filtering for European soil (OPP-0000267)	Basic Reminder	Active	2019-03-11	2019-03-11	Assign opportunity team


Predefined Workspace Templates (Sales)


Best Practice multilingual Folder Structure, Business Relationships


 Business Partner Customer Account ▾


 Opportunity ▾


 Quotation ▾


 Sales Order ▾


 Contract Sales ▾

<input type="checkbox"/>	Type	Name ▲
<input type="checkbox"/>	00	Customer Correspondence external ▾
<input type="checkbox"/>	00	Customer Correspondence internal ▾
<input type="checkbox"/>	10	Customer Information ▾
<input type="checkbox"/>	20	Account Management ▾
<input type="checkbox"/>	30	Sales Activities ▾
<input type="checkbox"/>	40	Meeting Reports, Protocols ▾
<input type="checkbox"/>	50	Self Disclosure ▾
<input type="checkbox"/>	905	Leads ▾
<input type="checkbox"/>	910	Cases, Notifications ▾
<input type="checkbox"/>	920	Opportunities ▾
<input type="checkbox"/>	930	Quotations ▾
<input type="checkbox"/>	940	Contracts ▾
<input type="checkbox"/>	950	Sales Orders ▾
<input type="checkbox"/>	975	Equipment ▾
<input type="checkbox"/>	990	Invoices ▾
<input type="checkbox"/>	999	Business Partners ▾


<input type="checkbox"/>	Type	Name ▲
<input type="checkbox"/>	00	Correspondence external ▾
<input type="checkbox"/>	00	Correspondence internal ▾
<input type="checkbox"/>	10	Customer Request, Inquiry ▾
<input type="checkbox"/>	20	Meeting Reports ▾
<input type="checkbox"/>	905	Leads ▾
<input type="checkbox"/>	930	Quotations ▾

<input type="checkbox"/>	Type	Name ▲
<input type="checkbox"/>	00	Correspondence external ▾
<input type="checkbox"/>	00	Correspondence internal ▾
<input type="checkbox"/>	10	Final Quotation ▾
<input type="checkbox"/>	20	Quotation Drafts ▾
<input type="checkbox"/>	30	Calculation ▾
<input type="checkbox"/>	40	Configuration and Specification ▾

<input type="checkbox"/>	Type	Name ▲
<input type="checkbox"/>	00	Sales Order Correspondence external ▾
<input type="checkbox"/>	00	Sales Order Correspondence internal ▾
<input type="checkbox"/>	10	Order Confirmation ▾
<input type="checkbox"/>	40	Confirmation of Acceptance ▾

<input type="checkbox"/>	Type	Name ▲
<input type="checkbox"/>	00	Correspondence external ▾
<input type="checkbox"/>	00	Correspondence internal ▾
<input type="checkbox"/>	10	Final Contract ▾
<input type="checkbox"/>	20	Contract Drafts ▾

- Multi-language (en/de) Business Workspace folder structure for key documents
- Assisted Classifications for key documents based on ISO, industry standards
- Automated Business Relationships of workspaces - end-to-end process-driven



Business relationships



End-to-End Metadata Model

consistent object oriented cross-process data model with categories (example)

Business Partner

Business Partner Address

Business Partner Customer Account

Organization

Business Partner Name:

Business Partner Number:

Account Number (Salesforce):

Debitor Number (SAP):

DUNS Number:

CREFO Number:

Address1:

City:

Zip/Postal Code:

Country:

Phone:

Fax:

E-mail:

Business Partner

Business Partner Address

Business Partner Customer Account

Company

Company Code

Company Name

Procurement Organization

Purchasing Organization

Sales Organization

Sales Organization

Distribution Channel

Division

Sales Office

Sales Group

Row

Business Partner (Creditor)

Contract

Organization

Reference Number

xECM Workspace Classification

Contract Number (ECM):

Contract Number (SAP):

Contract Number (Salesforce):

Contract Number Partner:

Contract Number (Legacy):

Transaction Type:

Contract Duration

Effective Date

Renewal Date

End Date

Latest Termination Date

Duration Notes

Time Limitation

Contract Status:

Renewal Option

Renewal Option:

Renewal in month:

Signatures

Signees

First Name

Last Name

Signature Date Internal

Signature Date Partner External

Signature Status:



Advantages of complon® End-to-End Metadata Model

- Cross-scenario search options
- Cross-scenario filter and dashboard options
- Cross-scenario reporting capabilities
- Easy to maintain in case of attribute changes
- User friendly logical metadata collection
- Only the metadata really needed for searches, filters and evaluations is transferred from the leading systems (SAP, Salesforce) into ECM

The screenshot displays the complon interface with three main components:

- Content Filter:** A sidebar on the left with a search bar and a list of filter categories including Business Partner, Contract, and Procurement.
- Search Form:** A top-right panel with a dropdown menu set to 'Business Partner - Customer'. It includes a 'Full Text' search bar, 'Look For' (All Words), 'Modifier' (<none>), and 'Where' (All) options. Below are sections for 'System Attributes' and 'Category: Business Partner' with various input fields and dropdowns.
- Contract Portfolio:** A table at the bottom showing a list of contracts with columns for No., Ref. No., Case, Status, Transaction, Business Partner, Business Partner Supplier, Effective Date, End Date, Latest Termination Date, and Material Group.

No.	Ref. No.	Case	Status	Transaction	Business Partner	Business Partner Supplier	Effective Date	End Date	Latest Termination Date	Material Group
1.	HA00000001	complon GmbH MA PROCURE Services 2016/10/01 (HA000000001)	Aktiv	Buy Side	complon GmbH	complon GmbH	2016-10-01	2019-09-30	2019-06-30	25000000 Dienstleistung
2.	C00000006	complon GmbH Procurement, NDA 2017/03/24 (C00000006)	Aktiv	Buy Side	complon GmbH	complon GmbH	2017-03-24	2018-03-23		
3.	C00000021	OpenText Software GmbH IT Maintenance 2013/03/09 (C00000021)	Gekündigt	Buy Side	complon GmbH	OpenText Software GmbH	2013-03-09	2018-03-09	2018-01-09	19221200 Branchen-Software (Server-Betriebssystem)
4.	C00000015	Evangelisches Krankenhaus Bielefeld gGmbH Procurement Material 2016/03/01 (C00000015)	Entwurf	Buy Side	complon GmbH	Evangelisches Krankenhaus Bielefeld gGmbH	2016-03-01			
5.	C00000018	OpenText Software GmbH Procurement IT Software Licenses 2013/02/01 (C00000018)	Aktiv	Buy Side	complon GmbH	OpenText Software GmbH	2013-02-01	2018-02-02	2017-12-02	19210000 Software (Client-Betriebssystem)
6.	C00000014	Dell GmbH Procurement Material 2016/07/04 (C00000014)	Aktiv	Buy Side	complon GmbH	Dell GmbH	2016-07-04	2019-05-31		19000000 Informations-, Kommunikations- und Medientechnik
7.	C00000022	SAP AG Einkauf Dienstleistungen 2013/09/25 (C00000022)	Aktiv	Buy Side	SAP AG	SAP AG	2013-09-25	2018-06-31	2018-05-31	25000000 Dienstleistung

complon® PowerUI - xECM Customer Workspace (Classic)

Enterprise ▾ Personal ▾ Tools ▾ My Account ▾ Business Workspaces ▾ 🔍 Search Search From Here

ECM Enterprise ▸ INNOVATION EN ▸ 01 - Sales ▸ Business Partner Customer... ▸ Germany ▸ P ▸

Paulsen Plants (0000090 | 1008324) Customer Workspace ▾

Content Filter

Filter by name 🔍

Business Workspace View

Application

Microsoft Word (5)
Microsoft Powerpoint (1)
More...

Content Type

Related Business Workspaces (9)
Document (6)
Folder (5)
Email Folder (2)
Email (1)
More...

Modified Date

Office

Word Processor (5)
Presentation (1)
More...

Owner

Created Date

Pulse From Here

Type	Name	Size	Creation Date
00 Customer Correspondence external		0 Items	April/12/2018 20:49
00 Customer Correspondence internal		1 Item	April/12/2018 20:49
10 Customer Information		0 Items	April/12/2018 20:49
20 Account Management		2 Items	April/12/2018 20:49
30 Sales Activities		0 Items	April/12/2018 20:49
40 Meeting Reports, Protocols		3 Items	April/12/2018 20:49
50 Self Disclosure		1 Item	April/12/2018 20:49
905 Leads		0 Items	April/12/2018 20:49
910 Cases, Notifications		5 Items	April/12/2018 20:49
920 Opportunities		12 Items	April/12/2018 20:49
930 Quotations		2 Items	April/12/2018 20:49
940 Contracts		4 Items	April/12/2018 20:49
950 Sales Orders		2 Items	April/12/2018 20:49
975 Equipment		1 Item	April/12/2018 20:49
990 Invoices		0 Items	April/12/2018 20:49
999 Business Partners		1 Item	April/12/2018 20:49

16 Items

Copy Move Delete Zip & Download Email Link Print Collect Apply Classification Remove Classification

Paulsen Plants (0000090 | 1008324) Customer Workspace

Salesforce access

Customer Workspace
BP Customer Account (SF): 0010Y00001L66PBQAZ

Business Partner Information

Business Partner Number : 0000090
Account Number (Salesforce) : 0000090
Debitor Number (SAP) : 1008324
All attributes

Bill-to Address

Street : Kumeysstr. 133
Zip/Postal Code : 19230
City : Groß Krams
Country : Deutschland

Sales

- Paulsen Plants - Additional pre-production load capacities (OPP-0000265)
- Paulsen Plants - Automated transportation of PreformCaps (OPP-0000246)
- Paulsen Plants - Automation Assembly (OPP-0000247)
- Paulsen Plants - Buffering of PowerOverflow capacities (OPP-0000260)
- Paulsen Plants - Customer Quotation 2018-07-02 (20000046)
- Paulsen Plants - Customer Quotation 2019-05-31 (00001602)
- Paulsen Plants - Extension Production line (OPP-0000268)

Order Processing

- Paulsen Plants - Key Account Frame Agreement - 2018-01-01 (00001709)
- Paulsen Plants - Partner Agreement - 2019-01-01 (00001712)
- Paulsen Plants - Project Contract - 2018-01-01 (00001708)
- Paulsen Plants - Project Contract - 2019-03-11 (00001715)
- Paulsen Plants (2000) - Sales Order 2018-03-30 (30002258)
- Paulsen Plants (2000) - Sales Order 2019-03-01 (30003247)

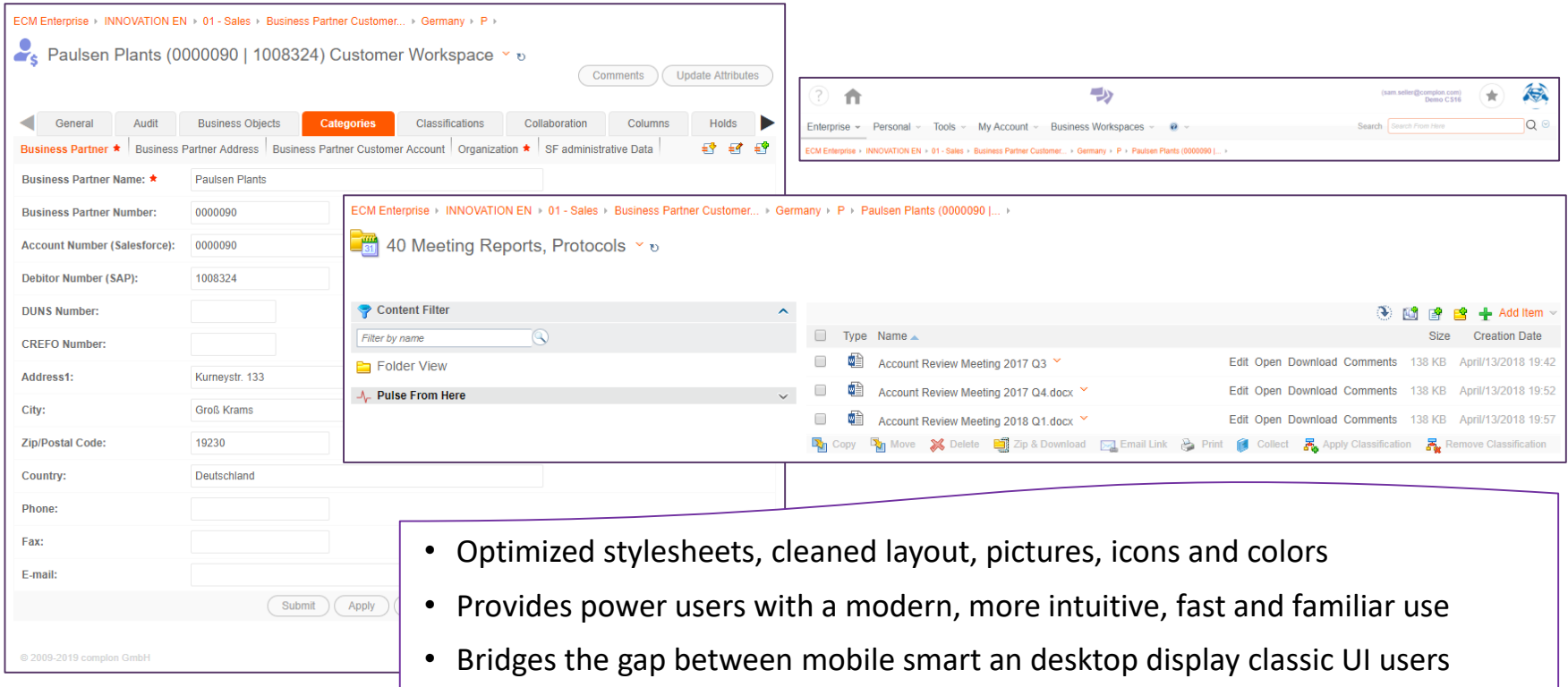
Customer Service

- Equipment - S (30001389) XR24-XL with ext. pack
- Service Notification (0311) Engine loud noises when turning right

- Enhanced modernized classic view (full functionality incl. Collection, Comments)
- Optimized stylesheets, cleaned layout, pictures, icons and colors

complon® PowerUI

modernized Properties, List view, Header, ...



The screenshot displays the complon PowerUI interface, which is a modernized version of a legacy system. The interface is divided into several sections:

- Header:** The top navigation bar includes the breadcrumb "ECM Enterprise > INNOVATION EN > 01 - Sales > Business Partner Customer... > Germany > P >". Below this, the user is logged in as "Paulsen Plants (0000090 | 1008324) Customer Workspace". There are buttons for "Comments" and "Update Attributes".
- Properties Section:** On the left, there is a "Business Partner" section with tabs for "General", "Audit", "Business Objects", "Categories", "Classifications", "Collaboration", "Columns", and "Holds". The "Categories" tab is active, showing fields for "Business Partner Name", "Business Partner Number", "Account Number (Salesforce)", "Debitor Number (SAP)", "DUNS Number", "CREFO Number", "Address1", "City", "Zip/Postal Code", "Country", "Phone", "Fax", and "E-mail".
- List View:** On the right, there is a list view titled "40 Meeting Reports, Protocols". It features a "Content Filter" section with a "Filter by name" input field. Below the filter, there is a "Folder View" section with a "Pulse From Here" button. The list view displays a table of meeting reports with columns for "Type", "Name", "Size", and "Creation Date". The table contains three entries: "Account Review Meeting 2017 Q3", "Account Review Meeting 2017 Q4.docx", and "Account Review Meeting 2018 Q1.docx". Each entry has a set of action buttons: "Edit", "Open", "Download", and "Comments".
- Footer:** The bottom left corner shows the copyright notice "© 2009-2019 complon GmbH".

- Optimized stylesheets, cleaned layout, pictures, icons and colors
- Provides power users with a modern, more intuitive, fast and familiar use
- Bridges the gap between mobile smart an desktop display classic UI users

complon® Reporting and Dashboard Package

Rich report set, search in results, sorting, export to Excel, automation



Contract Portfolio

Show entries

Search Search Search Search Search Search Search Search Search Search

No	Ref-No.	Icon	Case	Status	Transaction	Business Partner Customer	Business Partner Supplier	Effective Date	End Date	Latest Termination Date	Material Group	Contract Type	Company	Contract Responsible
1.	MA00000001		complon GmbH MA PROCURE Services 2016/10/01 (MA00000001)	Aktiv	Buy Side		complon GmbH	2016-10-01	2019-09-30	2019-06-30	25000000 Dienstleistung	Rahmenvertrag Dienstleistung	Innovation AG	Andy Wyatt
2.	C00000006		complon GmbH Procurement, NDA 2017/03/24 (C00000006)	Aktiv	Buy Side		complon GmbH	2017-03-24	2018-03-23			Geheimhaltung (NDA)	Innovation AG	Andy Wyatt
3.	C00000021		OpenText Software GmbH IT Maintenance 2013/03/09 (C00000021)	Gekündigt	Buy Side		complon GmbH; OpenText Software GmbH	2013-03-09	2018-03-09	2018-01-08	19221200 Branchen-Software (Server-Betriebssystem)	Wartung IT	Innovation AG	Andy Wyatt
4.	C00000015		Evangelisches Krankenhaus Bielefeld gGmbH Procurement Material 2018/03/01 (C00000015)	Entwurf	Buy Side		Evangelisches Krankenhaus Bielefeld gGmbH	2018-03-01				Contract Workspace	Innovation AG	Jeff Benham
5.	C00000018		OpenText Software GmbH Procurement IT Softwarelicences 2013/02/01 (C00000018)	Aktiv	Buy Side		OpenText Software GmbH; complon GmbH	2013-02-01	2018-02-02	2017-12-02	19210000 Software (Client-Betriebssystem)	Softwareizenzen IT	Innovation AG	Andy Wyatt
6.	C00000014		Procurement Material 2016/07/04 (C00000014)	Aktiv	Buy Side			2016-07-04	2019-05-31		19000000 Informations-, Kommunikations-, und Medientechnik	Contract Workspace	Innovation AG	Andy Wyatt
7.	C00000022		SAP AG Einkauf Dienstleistungen 2015/09/25 (C00000022)	Aktiv	Buy Side		SAP AG	2015-09-25	2018-08-31	2018-05-31	25000000 Dienstleistung	Dienstleistung	Innovation AG	Andy Wyatt
8.	C00000026		salesforce.com Germany GmbH Procurement IT Softwarelicences 2016/09/15 (C00000026)	Aktiv	Buy Side		salesforce.com Germany GmbH	2016-09-15	2018-09-15		19210000 Software (Client-Betriebssystem)	Softwareizenzen IT	Innovation AG	Andy Wyatt
9.	C00000027		salesforce.com Germany GmbH Procurement, NDA 2016/04/27 (C00000027)	Aktiv	Other		salesforce.com Germany GmbH	2016-04-27	2019-03-27			Geheimhaltung (NDA)	Innovation AG	Andy Wyatt
10.	C00000028		Procurement Material 2017/03/01 (C00000028)	Aktiv	Buy Side			2016-03-01	2018-06-01		25000000 Dienstleistung	Contract Workspace	Innovation AG	Jeff Benham

Showing 1 to 10 of 19 entries

First Previous **1** 2 Next Last

Contracts without Follow Up

Show entries

Search Search

No	Ref-No.	Icon	Case	Status	Transaction	Business Partner Name	Business Partner Supplier	Effective Date	End Date	Latest Termination Date	Material Group	Contract Type	Company	Contract Responsible
1.	C00000001		complon GmbH Einkauf											
2.	C00000007		B GmbH & Co. KG Einkauf											
3.	C00000016		OpenText Software GmbH											
4.	C00000018		OpenText Software GmbH											
5.	C00000020		OpenText Software GmbH											
6.	C00000026		salesforce.com Germany GmbH											
7.	C00000027		salesforce.com Germany GmbH											
8.	C00000028		Procurement Material 2017/03/01 (C00000028)					2016-03-01	2018-06-01					
9.	C00000029		Procurement, NDA 2016/02/01 (C00000029)					2016-02-01	2021-03-31					
10.	C00000033		Procurement Material 2017/03/01 (C00000033)					2017-03-01	2017-12-31					

Showing 1 to 10 of 10 entries

First Previous **1** Next Last

Start Folder

Effective Date

End Date

Business Partner Name

Status

Contract Type

Material Group

Purchasing Group

Contracts without Follow Up

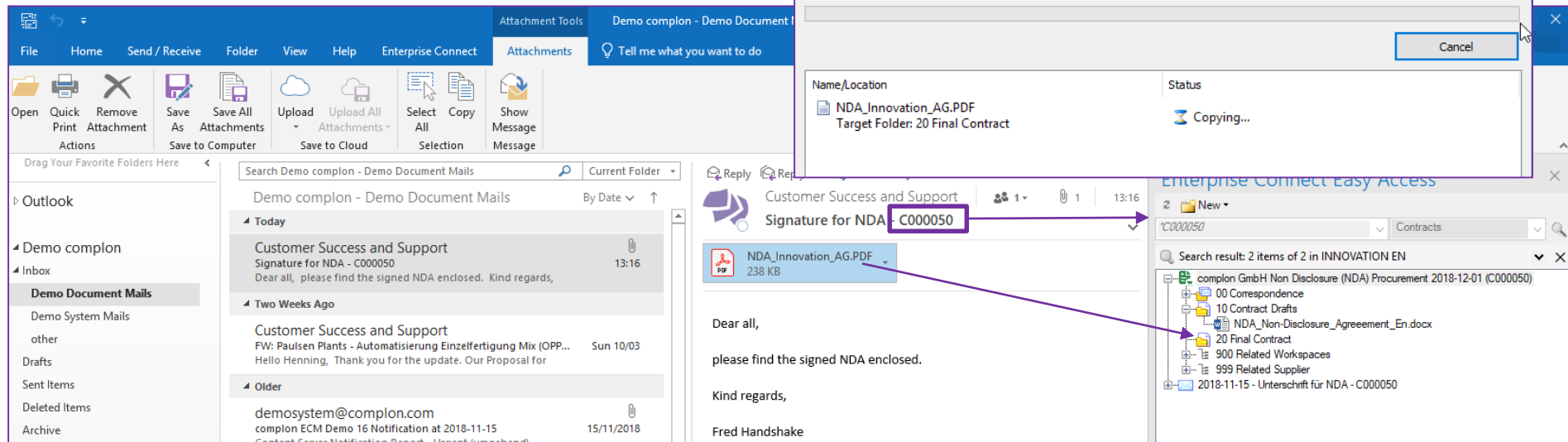
Search

Latest Termination Date	Action	Duration Notes	Contract Manager
-21			Andy Wyatt
-01		Der Vertrag verlängert sich jeweils um 1 Jahr, wenn er nicht 1 Monat vor Vertragsende gekündigt wird.	Jennifer Judy
-30		Der Vertrag verlängert sich jeweils um 1 Jahr, wenn er nicht 1 Monat vor Vertragsende gekündigt wird.	Jennifer Judy
-02		Der Vertrag verlängert sich jeweils um 1 Jahr, wenn er nicht 3 Monate vor Vertragsende gekündigt wird.	Andy Wyatt
-18		Der Vertrag verlängert sich um jeweils 1 Jahr, wenn nicht 3 Monate vor Vertragsende gekündigt wird.	Andy Wyatt
-15			Andy Wyatt
-27			Andy Wyatt
			Jeff Benham
			Andy Wyatt
			Andy Wyatt
		3 Monate zum Vertragsende	Andy Wyatt

First Previous **1** Next Last

Higher User Acceptance by assisted storage of E-Mails and attachments

Predefined searches in Outlook



The screenshot displays the Outlook interface with the 'Attachments' tab selected. The 'Attachment Tools' ribbon shows options like 'Open', 'Quick Print', 'Remove Attachment', 'Save As', 'Save All Attachments', 'Upload', 'Upload All Attachments', 'Select All', 'Copy', and 'Show Message'. The main pane shows an email from 'Customer Success and Support' with the subject 'Signature for NDA - C000050'. The email body contains a message about a signed NDA. A 'Copying...' dialog box is open, showing 'Processing item 1 of 1' and 'Target Folder: 20 Final Contract'. The 'Enterprise Connect Easy Access' pane on the right shows a search result for 'C000050' in the 'Contracts' folder, listing various documents including 'NDA_Innovation_AG.PDF' and '20 Final Contract'. A purple arrow points from the 'NDA_Innovation_AG.PDF' attachment in the email to the corresponding file in the 'Enterprise Connect Easy Access' pane.

- Patterns in e-mail subject lines trigger predefined specific searches
- Easily drag & drop e-mail messages and attachments to corresponding Business Workspaces



complon® xECM Business Solutions - selected Features

Flexible automated Content Structure

- **Smart creation and updating** of workspaces from Salesforce® and SAP® S/4HANA, ERP
- **Hierarchical legal entity, process structures**
- Multi-cross-application xECM integration allows for **x-Application Workspaces with enhanced property providers** (end-to-end)
- **Dynamic workspace template selection**
- **Auto-Renaming of Workspaces**
- **Auto-Move of Workspaces**
- **Automated Business Relations** on Attributes

User Acceptance

- **Optimized Style for Smart UI**
- **Modernized PowerUI** for classic view of Content Server for Power Users
- **Automated Archiving** of documents printed from SAP and presentation in Workspaces
- **Reporting and Search Template Packages** in Outlook, ECM save time when storing, searching documents, automate processes
- **assisted Document Classifications** according to ISO standards, Master Document List, File plan
- **Efficient User and Permission Management** permissions by template, folder structure, attributes, reference user, change owner

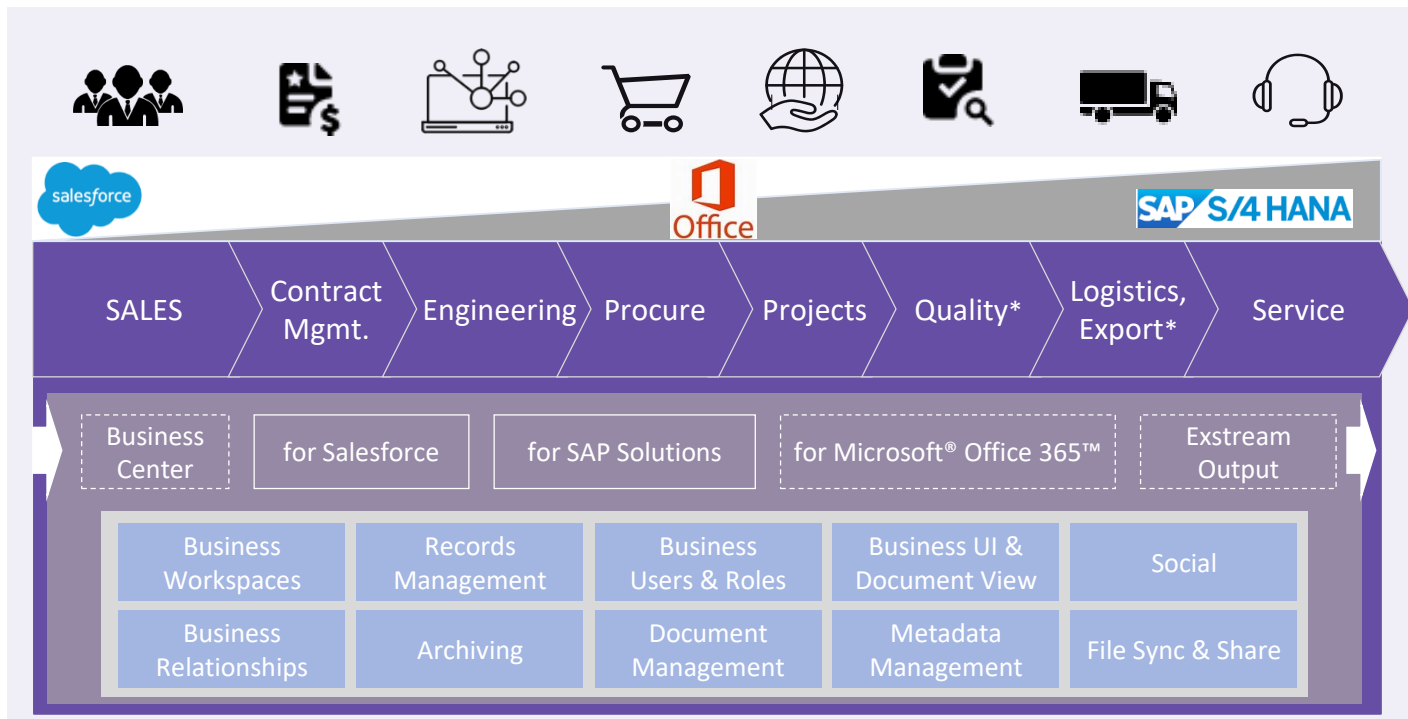
complon® Business Solutions are ready to run modular business process driven xECM products

Business Applications

**complon® xECM16
Business solutions**

opentext™
Extended ECM
platform solutions

opentext™
Content Suite



*) complon® solution accelerator
-- optional components

Experience the Added Value



Consistent and modular
digital End-to-End Process

Process to key documents
to business role mapping

End-to-End Data Model

Interface Data Mapping
Salesforce to SAP S/4HANA

Enhanced Smart UI and
complon Power UI

Preconfigured
Best Practice Templates with

- Landing pages and dashboards
- 30+ Workspace Templates
- 200 assisted doc classifications
- 145 business relations
- 50+ WebReports
- 60+ Cats w. attributes, facets
- Standard naming conventions
- Review Workflows, Reminders
- Many predefined Searches

Bridging the GAP
between SAP and Salesforce

Smart SAP, SF Property Provider

Cross-Application relationships
Salesforce/SAP S/4HANA, ERP

Smart Automation

- Creation
- Updates, Orga Changes
- Relation of workspaces
- Permissions, User Mgmt.

Comprehensive Product Documentation



COMPLON® XECM16.2 FOR SALES

RELEASE NOTES

16.2.4

1. Release Notes Revision History	3
2. About complon® xECM 16 Business Solution for SERVICES	3
3. What's new in this Release	3
3.1 Change History complon® xECM Business solution for SAP S/4 HANA package	4
4. Overview of components	5
4.1 OpenText ContentECM for SAP solutions module	5
4.2 complon® xECM 16 Business Solution Content Server modules	5
4.2.1 complon® Connected Workspace Extensions	5
4.2.2 complon® Content Server Enhancements	6
4.2.3 complon® DFS Instant Type	7
4.2.4 complon® Content Server Extensions	8
4.2.5 complon® Custom Style	8
4.3 complon® xECM 16 Business solution for SAP Enhancement Packages	8
4.4 complon® Business Solution content packages (Transport packages, XML)	9
4.5 complon® xECM 16 Business solution Content Package for Subsites	9
4.6 complon® xECM Business solution for Extended ECM for SAP	9
4.7 complon® Report Packages (WebReport Packages)	11
5. Supported Business Processes, Business Objects and Workspaces	11
5.1 Table supported Business Processes	11
5.2 Table supported SAP Subsites Business Objects	11
5.3 Table Business Workspaces and DO Types, Search Help, Create and Change Trigger incl. derived Business Objects	12
6. Packaging and Documentation	12
6.1 Packaging and Delivery Information	12
6.2 Related Documentation	12
7. Supported Environments and Compatibility	13
7.1 Supported systems	13
7.1.1 Client Platform Support	13
7.1.2 Application Server Support	13
7.1.3 SAP Server Support	13
7.1.4 Supported SAP GUIs	13
7.2 OpenText Product Compatibility	14
7.3 Language Support	14
8. Requirements for SAP Applications	14
9. Installation and Upgrade Notes	14
9.1 Required knowledge	14
9.2 Prerequisites	14
9.3 Installation Notes	14
9.4 Further Options	15
9.5 Update and Upgrade Notes	15
9.6 Uninstallation Notes	15
10. Known Issues	16
11. Contact Information	17



complon xECM Business Solution for
Service

User Guide



INSTALLATION AND CONFIGURATION GUIDE

xECM Business Solution
for Service

Product version 16.2.4 • Document Version 1.0 • 04.06.2018

Table of contents

1. Introduction	6
1.1. Solution overview	6
1.2. System Overview	7
2. System setup	10
3. Installation of Solution Components	11
3.1. Checking the prerequisites	11
3.2. Installation Notes	11
3.3. Solution Installation	11
3.4. Update and Upgrade Notes	11
3.5. Uninstallation Notes	11
4. Solution Configuration – Content Server	12
4.1. Managing permissions	12
4.2. Creating Categories	15
4.3. Importing Classifications	16
4.4. Creating Root Folders	18
4.5. Importing workspace types	22
4.6. Configuring Business Workspaces for Content Server Smart View	23
4.7. Importing document templates	23
4.8. Connecting external leading system(s)	24
4.9. Importing business object types	24
4.10. Preparing the Content Server search functionality for users	25
4.11. Importing predefined Facets and Columns	35
4.12. Creating predefined Dashboards (Virtual Folders)	36
4.13. Configuring predefined Follow-up types	36
5. SAP Installation and Configuration	37
6. Verifying Deployment	38

Deploy - complon® xECM Business Solutions



opentext™

Who trusts us?



SIEMENS



KUKA



2 SWAROVSKI



PSE ENGINEERING
GMBH

Talk to us



If you are about to

- Start an Salesforce, SAP S/4HANA, OpenText project
- Extend the utilization of OpenText within your organization
- Update/Upgrade SAP to S/4 HANA, OpenText ECM

We will help you to

- Speed up your project
- Increase the user acceptance of the OpenText implementation
- Minimize the support costs and so the total cost of ownership

See us at our booth or get in contact with us

Alexander Beyer
CEO

complon GmbH

Friedenheimer Str. 47
80686 München

alexander.beyer@complon.com
www.complon.com
<https://www.linkedin.com/in/wolfalexanderbeyer/>

Please follow us.


complon
complon® xECM Business Solutions
Boost opentext™ Extended ECM for SAP and Salesforce

#successstory
#fastlaneimplementation
#contractmanagement
#datasecurity
#SAP
#businesssolutions
#wsnh
#360digital
#highlyexperienced
#worksmarternotharder
#bestpractice
#salesforce
#industry4.0
#reporting
#readytogo
@complongmbh
#automation
#sales
#procurement
#businessconsulting
#specialized
#end-to-end
#out-of-the-box
#connectedbusiness
#modularization
#standardization
#digitalization
#S4Hana
#compliance
#service
#otew
#RPA