aiim White Paper

Making the Most of Mobile

- content on the move

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About the White Paper

As the non-profit association dedicated to nurturing, growing and supporting the user and supplier communities of ECM (Enterprise Content Management) and Social Business Systems (or Enterprise 2.0), AIIM is proud to provide this research at no charge. In this way the education, the entire community can leverage the thought- leadership and direction provided by our work. Our objective is to present the "wisdom of the crowds" based on our 70,000-strong community.

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OpenText
275 Frank Tompa Drive
Waterloo, Ontario
Canada, N2L 0A1
Tel: +1 519-888-7111
Website: www.opentext.com

Process used and survey demographics

The survey results quoted in this report are taken from a survey carried out between 02 September 2011 and 13 September 2011, with 426 responses from individual members of the AIIM community surveyed using a Web-based tool. Invitations to take the survey were sent via email to a selection of AIIM's 70,000 registered individuals. Respondents are predominantly from North America and cover a representative spread of industry and government sectors. Results from organizations of less than 10 employees have not been included, bringing the total respondents to 401.

About AIIM

AIIM (www.aiim.org) is the community that provides education, research, and best practices to help organizations find, control and optimize their information. For more than 60 years, AIIM has been the leading non-profit organization focused on helping users to understand the challenges associated with managing documents, content, records and business processes. Today, AIIM is international in scope, independent and implementation-focused, acting as the intermediary between ECM users, vendors, and the channel.

About the author

Doug Miles is Director of the AIIM Market Intelligence Division. He has over 25 years' experience of working with users and vendors across a broad spectrum of IT applications. An early pioneer of document management systems, Doug has been involved in their evolution from technical solution to enterprise infrastructure platform. Most recently, Doug has produced a number of the AIIM survey reports on user issues and drivers for Capture, ECM, Records Management, SharePoint and Enterprise 2.0. He has also worked closely with other enterprise-level IT systems such as ERP, CRM and BI. He has an MSc in Communications Engineering and is a member in the UK of the Institute of Engineering and Technology.

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Introduction

The explosive growth in smartphones and tablets should raise a question in every CEO's mind. "How can we exploit the multi-functionality of these devices to improve the productivity and engagement of our workforce, and enhance our customer service?"

And in every CIO's mind should be the question, "How do we minimize the risk to the organization of mobile corporate data falling into the wrong hands?"

Information management in a mobile context needs to be seen in the same way as it is within the business walls. For remote, field-based and travelling staff, how do we make corporate information available *on* the device? How and what content can we capture *at* the mobile device? How can we extend and expedite electronic workflows *to* the device? And how do we secure access to, and dispose of, sensitive information stored *in* the device?

Overlaid on this, we need to be innovative. A modern mobile device has two important additional capabilities compared to an office PC. It will know where it is (geo-location), and it has a built-in imaging engine capable of capturing documents, photos, video and sound. On the converse, we must be aware of the reduced screen size (which limits data presentation), the touch input (which requires changes to the user interaction), and the greater likelihood of loss or theft.

Based on the results of a survey amongst the AIIM community, we will discuss the adoption of mobile interfaces, and in particular, mobile apps dedicated to content-centric business processes. We will explore the applications in use, the benefits being achieved and the issues raised, particularly those associated with security and the use of non-company devices.

Key Findings

- **Email is the killer app – access to other enterprise systems lags way behind.** 94% of those surveyed have successfully deployed mobile access to email, whereas 30% or less have mobile access to enterprise systems - ECM, CRM, ERP. Of those, less than two-thirds consider this mobile access to be successful.
- **Apps are much more successful than mobile access web-pages or conventional web pages.** As might be expected, the success rate jumps where mobile apps are available, especially for numerically orientated data access applications like ERP and finance, compared to those that require documents to be readable as well as accessible.
- **Mobile access to ECM systems is somewhat restricted.** 37% of organizations have no mobile access available on their ECM systems, and a further 30% would need to rely on a conventional web interface. 15% have a dedicated app, at least for iPhone.
- **Dedicated apps are popular for social business and data capture applications.** 38% have apps for employee use and 26% have apps for customer use. E2.0 and social are the most popular uses, followed by data capture and survey work.
- **As a relatively new platform, success can be variable.** 35% are very pleased with the business benefits of their mobile applications and 42% consider them to be useful. 22% admit they haven't got it right yet.
- **Despite advances, device capability and 3G coverage are still big issues.** 44% have tripped up over limited device capabilities, and 35% feel their apps lack functionality. Security is an issue quoted by 38%, and 3G coverage by 23%.
- **In-house app development seems rather too popular.** 57% are developing their own apps in-house with only 24% buying "open-market" apps. This could well be feeding back into issues of functionality, security and platform support.
- **The camera function is used by over one third of apps.** 38% are making use of the camera function, mostly for picture records, but also bar-code scanning and forms scanning.
- **Company-issue smartphones are catching up with laptops.** 22% of organizations have more than 2/3rds of staff issued with smartphones. Comparable number for laptops is 40%, but only 6% for tablets (and 5% for netbooks).

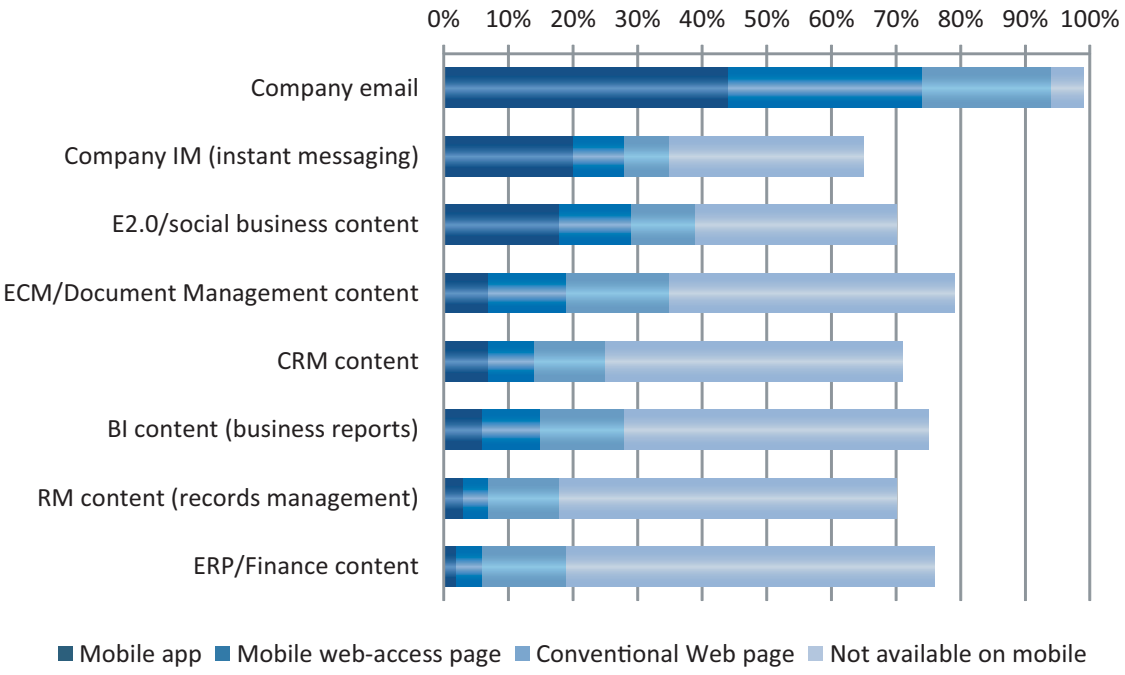
- **Organizations have very different calibration points of risk versus reward.** 23% of our respondents have overriding concerns about mobile security, whilst a matching 23% are determined that the security issue will not stand in the way of business benefits, leaving 54% striking a balance in the middle.
- **42% expect staff to carry two phones, a company one and a personal one.** 47% allow personal devices to access company data, but only a third of those enforce data-wipe policies. The rest rely on employee trust. 20% have no usage policy on mobile and 9% allow staff to hook up in an ad hoc way.
- **Spend on smartphone roll-out is set to be on-going, with an increasing spend on tablets and pre-packaged apps.** Our respondents also indicate an increased spend on mobile modules for ECM and other enterprise systems. External development of custom apps is also on the increase.

Mobile Information Access

Access Methods

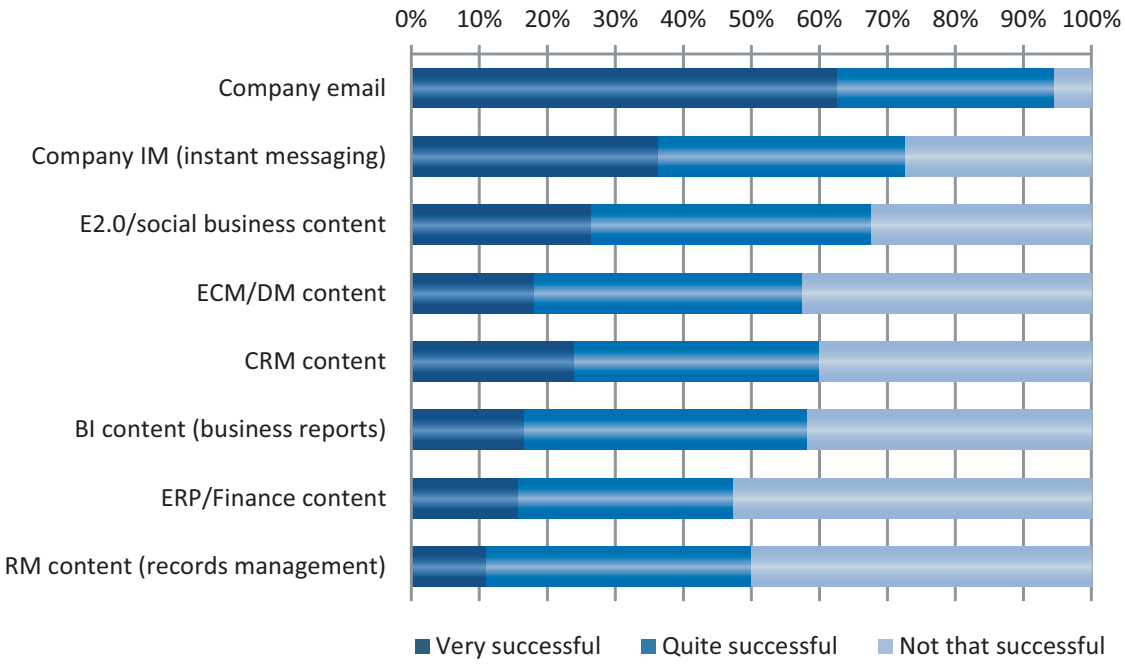
The need to keep travelling employees and field operators in touch with company email has been the driving force behind upgrading handsets to smartphones over the last few years, and we can see from Figure 1 that 94% of organizations have provided mobile email access, either by app-based clients or Outlook Web Access. Company instant messaging and access to social business applications are rather less prevalent, but 35% of organizations are keen that employees stay connected at all times – and indeed, this is sometimes a condition of a company-funded smartphone account. Remote access to ECM or Document Management systems is enabled for 35% of organizations, but access to other enterprise information sources and transactional data is less popular, with around a quarter providing access to systems such as CRM, ERP and BI, mostly through conventional web pages or mobile-access webpages, rather than dedicated apps.

Figure 1: What system data types are being accessed by your employees on mobile devices, and how are they generally being accessed? (N=399, "Not Applicable" makes up to 100%)



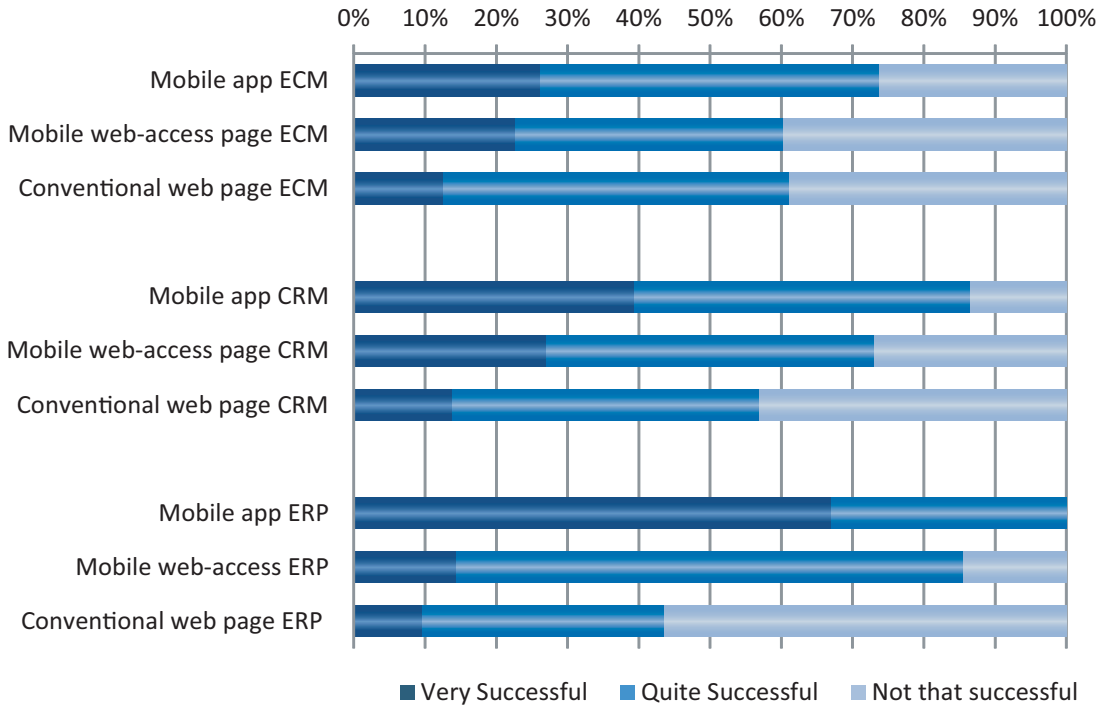
We can consider email to be a mature and effective mobile application, well served by mobile clients. Access to other enterprise systems, however, is not as universally successful, with success rates dropping below 60%.

Figure 2: How would you rate the effectiveness and productivity benefits of your mobile system access projects? (N=398, Normalized for "Not Available/Not Applicable")



To explore this further, we have combined Figures 1 and 2 together in Figure 3 for just three of these enterprise applications – ECM, CRM and ERP. At the top of each group we are looking at delivery using a mobile app, then next is a mobile-optimized web page, then a conventional web page.

Figure 3: How would you rate the effectiveness and productivity benefits of your mobile system access projects? (N=between 75 and 139 with mobile access, normalized)

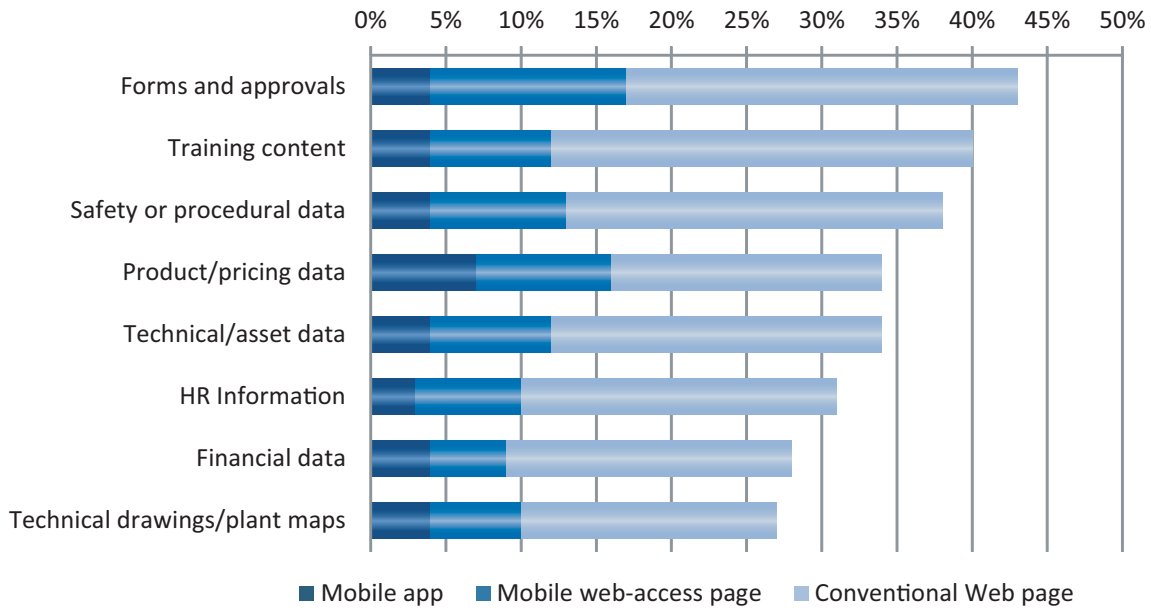


If we look at the bottom group first, we can see that for ERP, a mobile app improves the success rate from 50% to nearly 100% compared to mobile web-access, or conventional web-pages. Back at the top, for ECM, there is only an improvement from 60% to 73% with a dedicated app. This is understandable: finding the document is one part of ECM access, but then reading the document comfortably on a smartphone (especially a "small-screen" device like a Blackberry) is more difficult, and so not as successful as ERP, which is more likely to be numbers and data fields. CRM, a mixture of numeric data and text reports, confirms this result as the app-related improvement is half way between the other two.

Content Types Accessed

Taking a more general view of the types of content that users are accessing on the move, forms and approvals is the most popular, and this is more related to a process workflow, whereas training content, safety or procedural data, pricing and product data, and so on, are much more presentational – although pricing configurators is a good application for mobile devices, and this might explain the slightly higher proportion of apps-based access here.

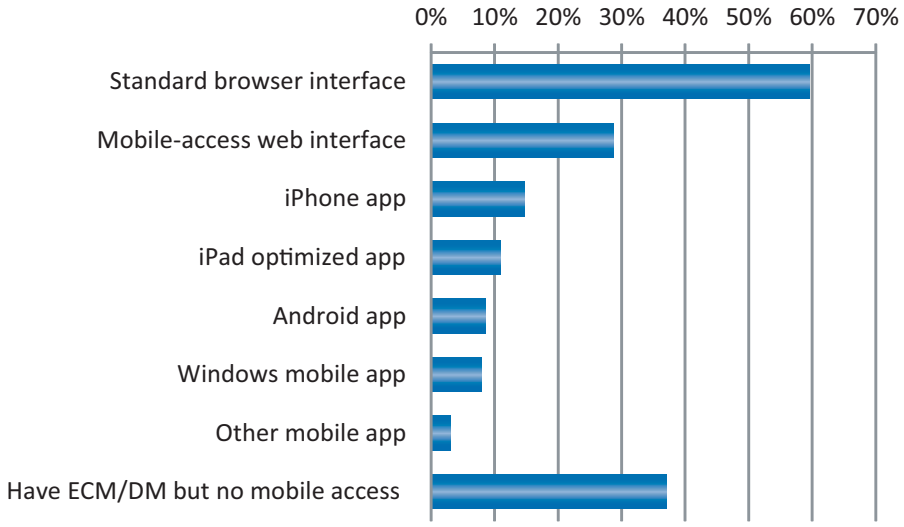
Figure 4: What content types are being accessed by your employees on mobile devices, and how are they accessed? (N=152, excl. "None of these")



Mobile Access to ECM

In Figure 1, we saw that 65% of organizations are not providing mobile access to ECM and DM systems. For some (37%), this will be due to the non-availability of any form of remote interface to their installed products, including simple web browser access. Of course, many users will not be using the latest versions of their supplier's software, so may not be able to take advantage of new mobile features.

Figure 5: Which of the following mobile access mechanisms does your main ECM/Document Management system provide? (N=292 excl. 103 Don't Know/No ECM)



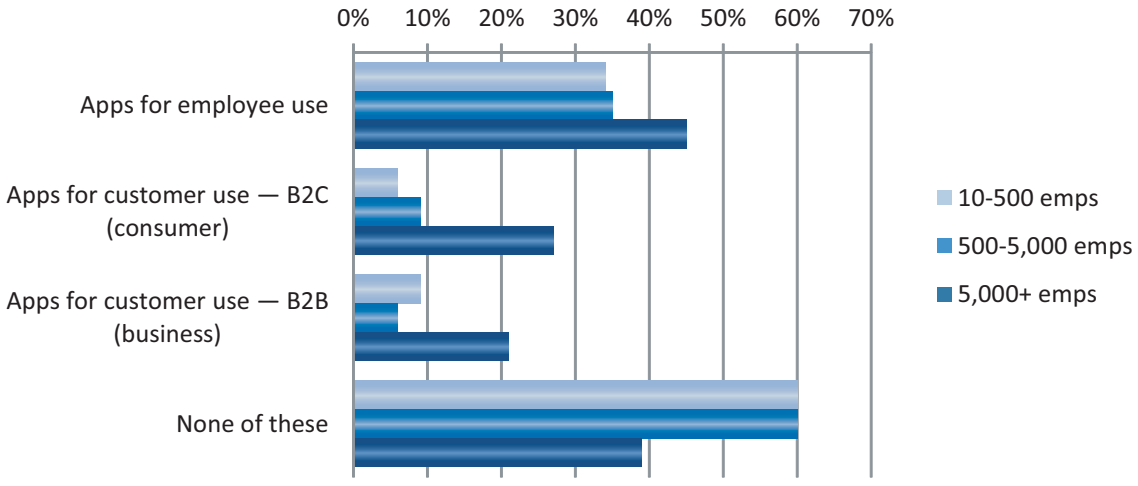
In addition to the 59% of installed systems that do have a standard web interface, 29% also have a mobile-friendly option. Less than 15% have a dedicated app with which they can access their ECM, and that is most likely to be for iPhones, although increasingly for iPads too. There are also third-party apps available for SharePoint which may not be showing up here. We asked users how they feel about the usability of their mobile ECM interface on smartphones, and how this compared to tablets. 20% feel that difficulty with the user interface is a problem in both cases and 13% have speed issues. Of the rest, there is general agreement that although a smartphone is usable, a tablet gives a big improvement.

Mobile Apps

Customer-Facing Apps

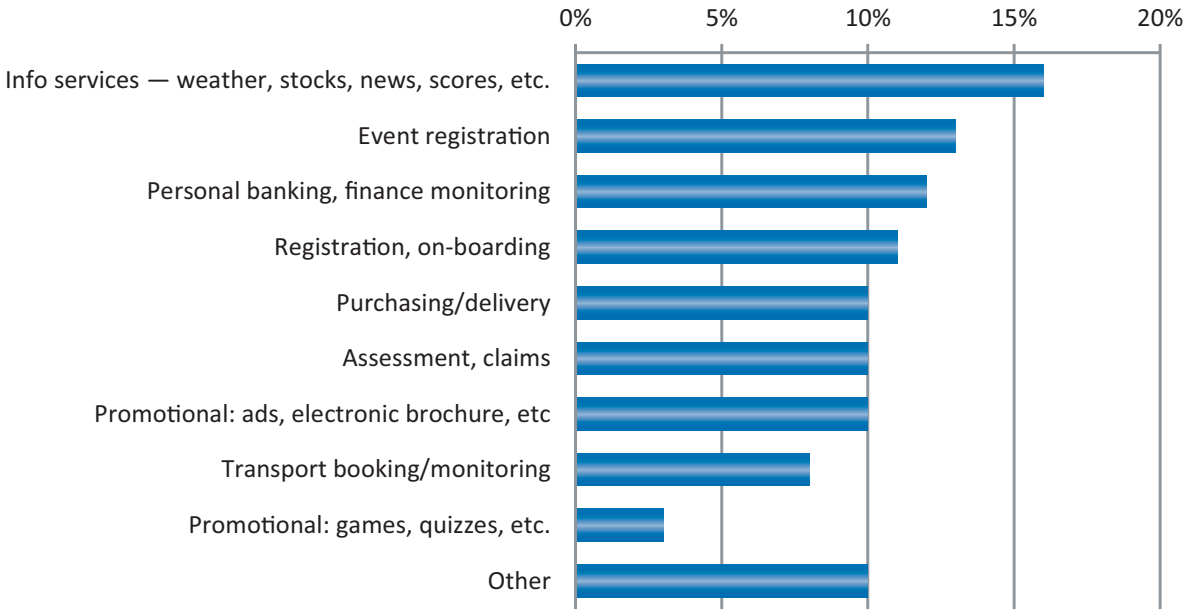
In our survey, we set out to explore the issues involved in assembling a set of useful apps both for employee use and for customer use. We can see from Figure 6 that around a third of the respondents to this survey have some apps for employee use, and this not just for larger companies. On the other hand, it is only the largest companies that are developing apps for customer use, with a significant proportion for business-to-business customers, as well as the more visible consumer apps.

Figure 6: Which of the following does your organization deploy as mobile-specific apps (other than email)? (N=390)



Customer-facing apps are primarily information services, but 10% of organizations deploying customer apps are moving beyond information access and promotion to add true process steps.

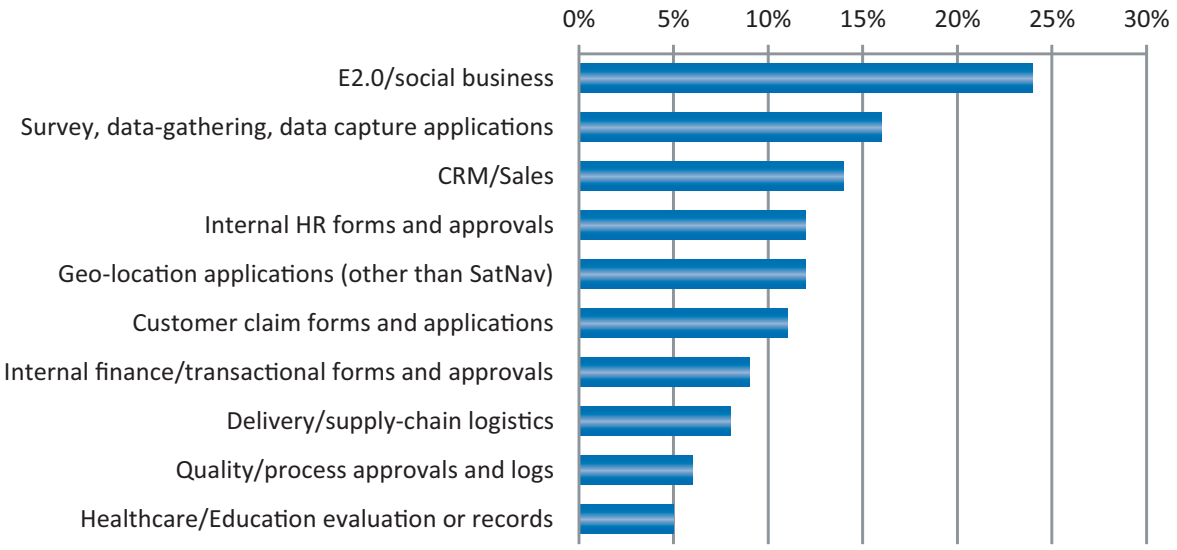
Figure 7: How would you best categorize the customer-facing apps you have? (N=98, excl. 74 "None of these")



Employee-Facing Apps

Employee-facing applications are quite varied, headed up by social business applications, but followed by the kind of data capture and forms processing applications that add real ROI.

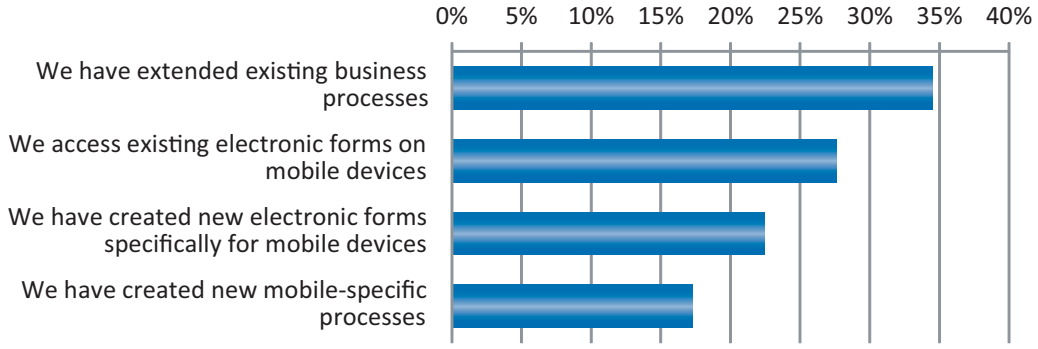
Figure 8: Has your organization deployed any of the following applications in a mobile-specific way? (N=106. Excl 71 (40%) "None of these" 17 (10%) "Other")



In fact 35% of those deploying mobile-specific applications consider them to be "essential to the business" or "highly productive" with a further 42% considering them "useful overall." Success is not guaranteed, however, with 22% considering their applications to be less successful than hoped. It may be that these organizations have not re-visited the process flow to take account of mobile access – particularly likely where mobile access is just a parallel option to conventional interfacing. The true gains are made when mobile content either kicks off the start of a business process, maybe an enrolment form or possibly a photo or video record, or the content presented on the mobile forms part of a process workflow, like an approvals

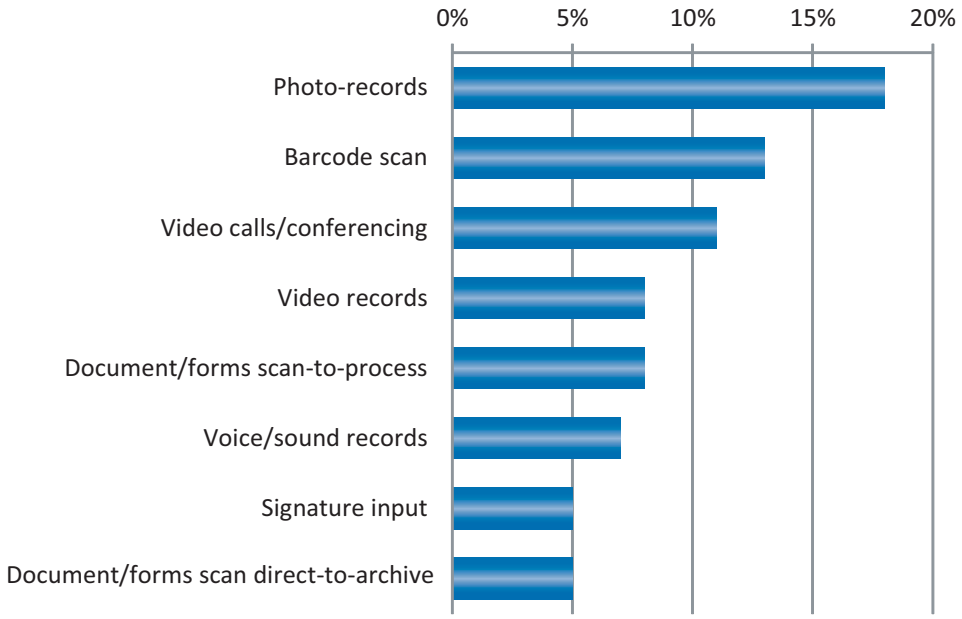
sign-off procedure or a field technician's fault report. This is where speed, quality and reliability are all improved compared to manual paper-forms or back-at-base processing.

Figure 9: For remotely accessed workflows and forms, which of the following would apply? (N=67, excl. 100 (58%) None of these/Not Applicable/Don't know)



Another likely result of merely extending existing business processes is that little use will be made of the unique combination of functions available on the latest mobile devices – live data connection, photo, video and sound recording, geo-location, map-presentation, barcode scanning, etc. Some of the most innovative applications make use of combinations of these functions. We only asked about camera applications, but 38% are indeed making use of the built-in camera across a wide range of possibilities.

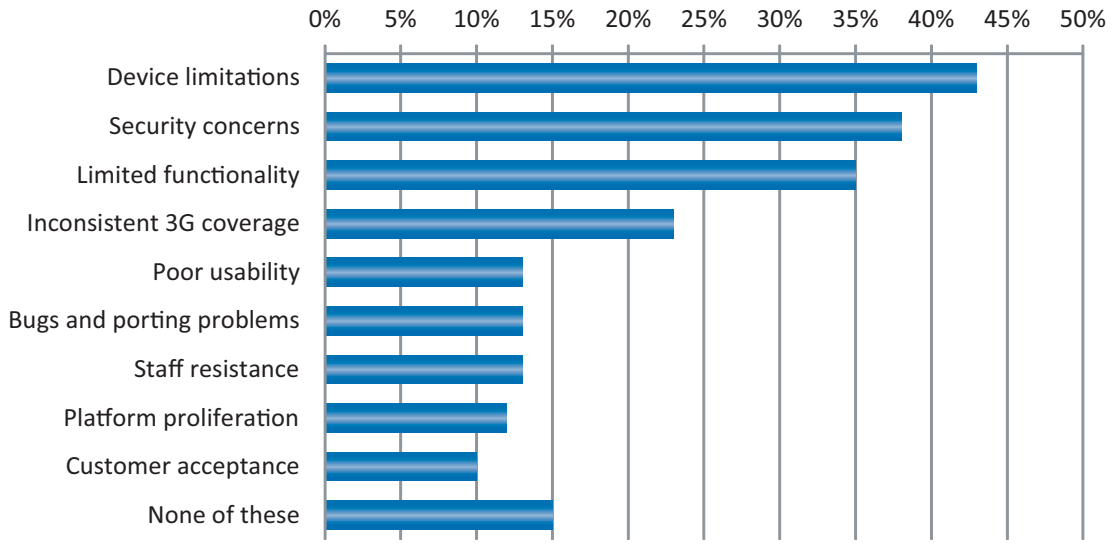
Figure 10: What formal use are you making of camera input on mobile devices? (N=165, inc. 106 (62%) "None of these")



Issues and Challenges

Our respondents consider device limitations and limited functionality to be the biggest drawbacks, and we should remember that not all companies are issuing the latest, full-feature, touch-screen phones. Security is a common issue – as would be expected. Almost any application will need to have some security aspects built in. Inconsistent 3G coverage is also cited by a quarter of users, and this can raise a requirement for local caching, or batch downloading. Platform proliferation comes surprisingly low on the list, suggesting that rules are in place for company-preferred devices, or that 3rd-party application providers are keeping up with the "OS wars". Staff resistance and customer acceptance are also a long way down the list, indicating that the novelty and convenience of most mobile applications causes users to forgive some of the limitations.

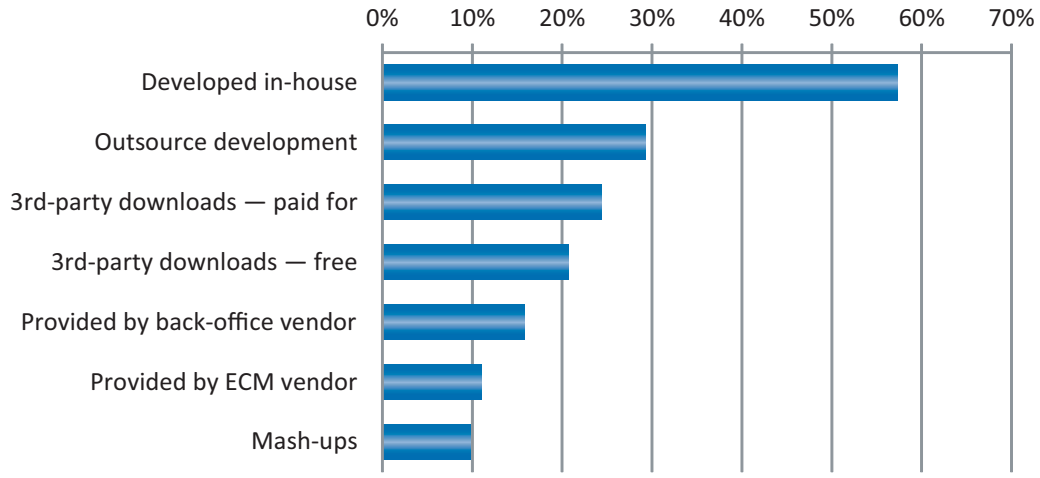
Figure 11: What issues have arisen in your use of mobile-specific applications? (N=165)



App Sourcing

Given its relative immaturity, it is no surprise that as yet there is no consensus on the best sourcing model for mobile applications. However, it is surprising to see so many organizations opting to develop apps in-house. This may reflect a desire to create a competitive advantage, or it may be that IT departments are only too keen to flex their programming skills in this novel new programming environment. It may also explain some of the issues mentioned above in terms of low functionality and poorly-executed security, and also the technical support issues mentioned later.

Figure 12: How are the main (official) mobile apps being sourced in your organization? (Check those that are significant) (N=133 excl. 32 Don't knows)



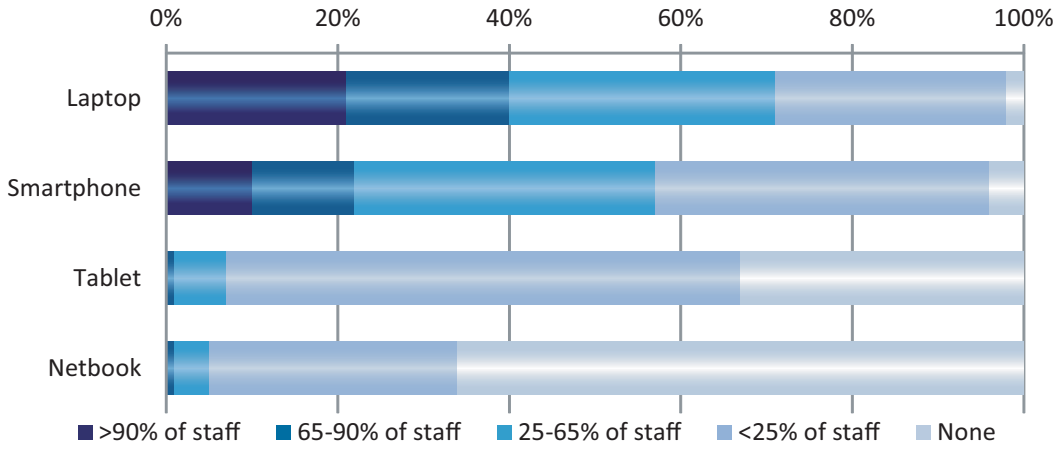
Of course, as we saw earlier, in such a fast-moving area, there is an inevitable lag as enterprise system vendors scramble to develop apps that match-in to standard back-office processes and systems, and as so often in computing, there are priorities to be decided as to which device platform to support. Third-party suppliers may be a useful source of apps, especially if the primary vendor is not being sufficiently agile.

A conclusion that comes from the open-ended responses in the survey (see Appendix 2) is that each mobile application needs to be analysed as a separate business case to ensure that it has sufficient functionality to be useful, that the user interface is effective on the company-preferred devices, that coverage, battery-life, etc. will not be an issue, that security is not compromised unduly and that it will add value for users and/or for the process. Beyond that, decisions are needed between in-house development and external sourcing, and an ROI target needs to be set to cover the development or procurement cost.

Device Management

Deployment of mobile devices for email has inevitably brought an increased overhead to most IT departments, and it follows on from the steady increase in laptop deployment.

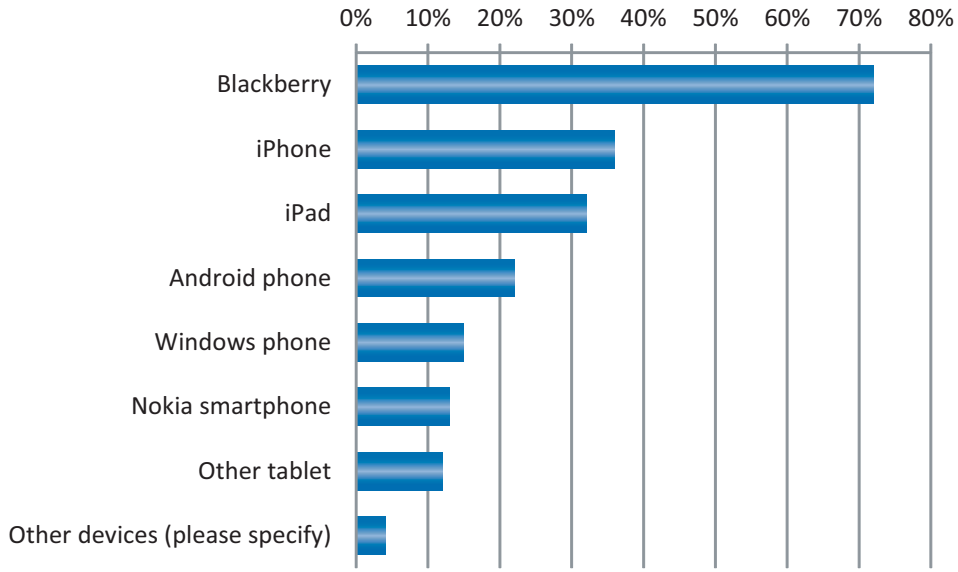
Figure 13: Which of the following portable/mobile devices are officially issued to employees in your organization, and to what proportion of professional/office staff? (N=166, excl."None of these" = 23%)



The first thing to note is that 23% of organizations have no official issue of portable devices. What we can then see is that 21% of organizations make laptops available to pretty much all their staff, and 40% in total make them available to 2/3rds of their staff. The comparable numbers for smartphones are 10% to all staff and 22% to 2/3rds of their staff – quite a considerable penetration, even so. Tablets are making inroads with 6% making them available to 2/3rds of staff – already ahead of netbooks, which never really caught on as a company issued device.

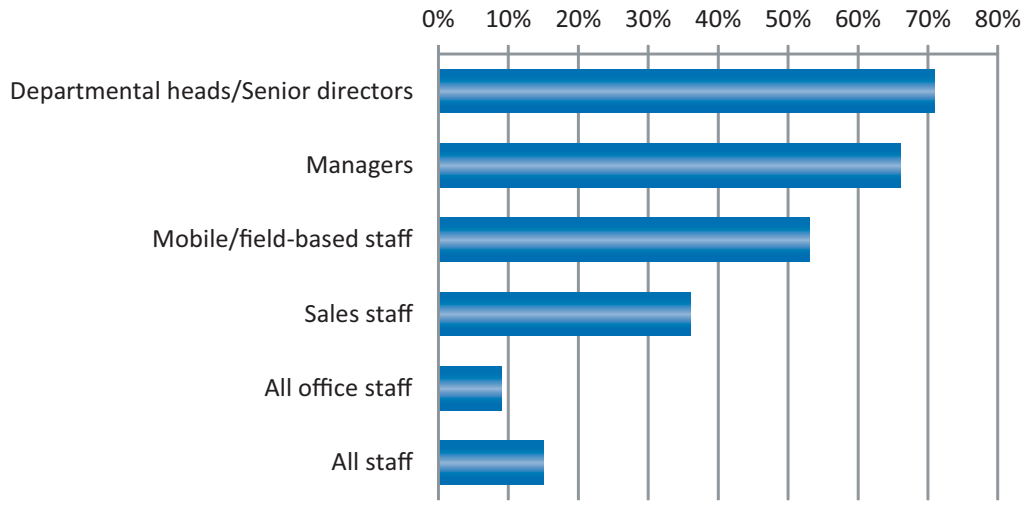
The breakdown of device types is largely as one would expect, and we need to note the predominance of Blackberries. We know that they have been the device of choice for email access, but it does mean that the installed base of smartphones is largely one of "small-screen," non-touch, devices. However, with most replacement cycles running over 2 or 3 years, this can change quite quickly.

Figure 14: Which of these mobile devices are officially issued in your organization? (check all that apply) (N=166)



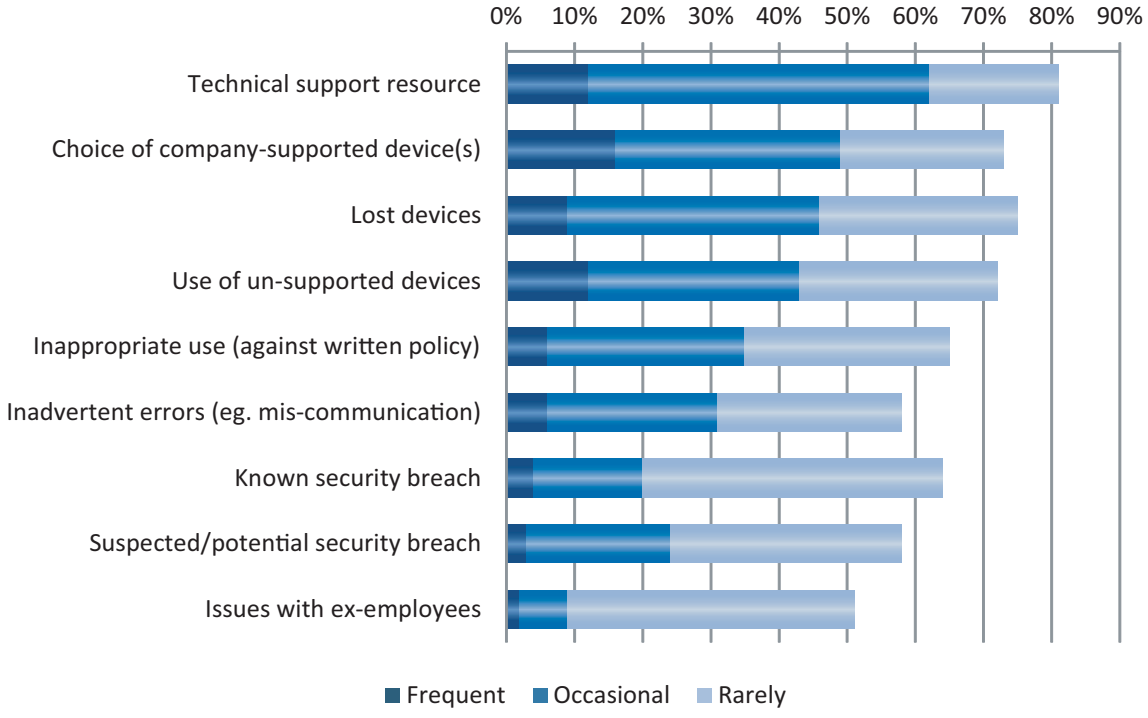
If we look at who in the business is issued with the smartphones, we see that management get the best "toys", and generally they are much more interested in downloading information than uploading data. Hence, perhaps, the slower take up of data capture and data process applications. Mobile and field staff are issued with smartphones in over half of the organizations surveyed.

Figure 15: Which members of staff are officially issued with smartphones in your organization? (check all that apply) (N=166)



Apart from the continual wrangling over the choice of company-preferred devices, technical support resource is the biggest issue with device management. Lost devices and inappropriate use play their part, and of some concern is that 16% of our respondents report occasional security breaches, and 4% have frequent breaches. 27% report having *suspected* breaches. It should be noted, however, that inappropriate use (contrary to policy) and inadvertent errors (due to poor concentration) are more frequent problems – e.g., sending emails to the wrong recipient.

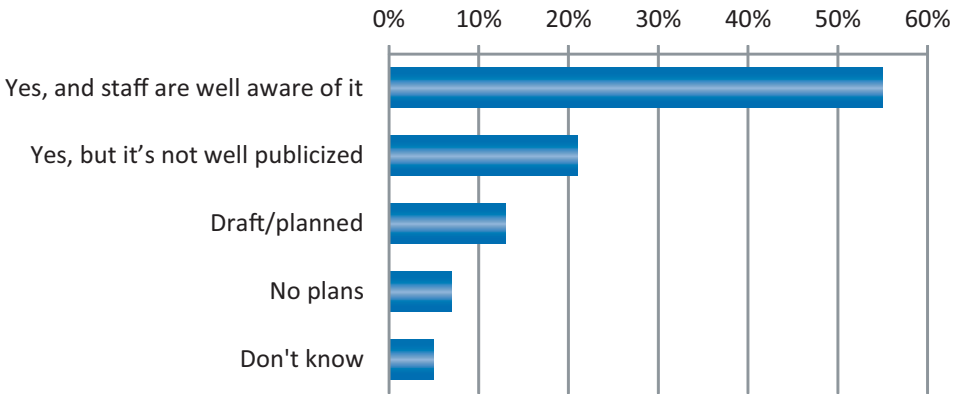
Figure 16: What issues have arisen in your organization from the use of mobile devices? (N=163 (N/A & Don't Know makes up to 100%))



Governance and Security

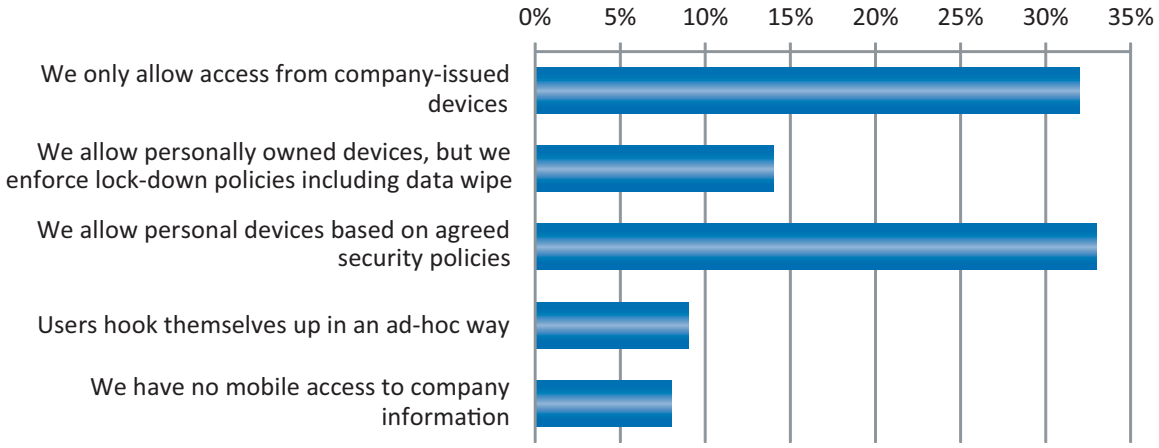
To manage mobile devices successfully and minimize problems, a governance policy is essential. This can be an extension of existing IT acceptable usage policies, although it may be better to create one specifically for mobile. This is an area that is moving quite fast, and just having a policy is not enough: it needs to be up-to-date, employees need to be aware that the policy exists, and it needs to be policed. Even if smartphones are not issued by the company, a policy is needed to cover files and content that might be transferred to a phone. Over 20% of organizations have no policy in place.

Figure 17: Do you have a staff policy for the use of mobile devices? (N=166)



The move from relatively utilitarian handsets to the "lifestyle companionship" of a smartphone has caused divergence between the company choice of devices and those chosen for personal use – to the extent that 42% of respondents in our survey expect employees to carry two phones, one for company use and one for personal use. This solution, of course, eases the security implications of personal devices connected to company networks, but isn't always popular with employees. Nor does it allow the company to widen the benefits of mobile devices in the workforce, with no additional cost.

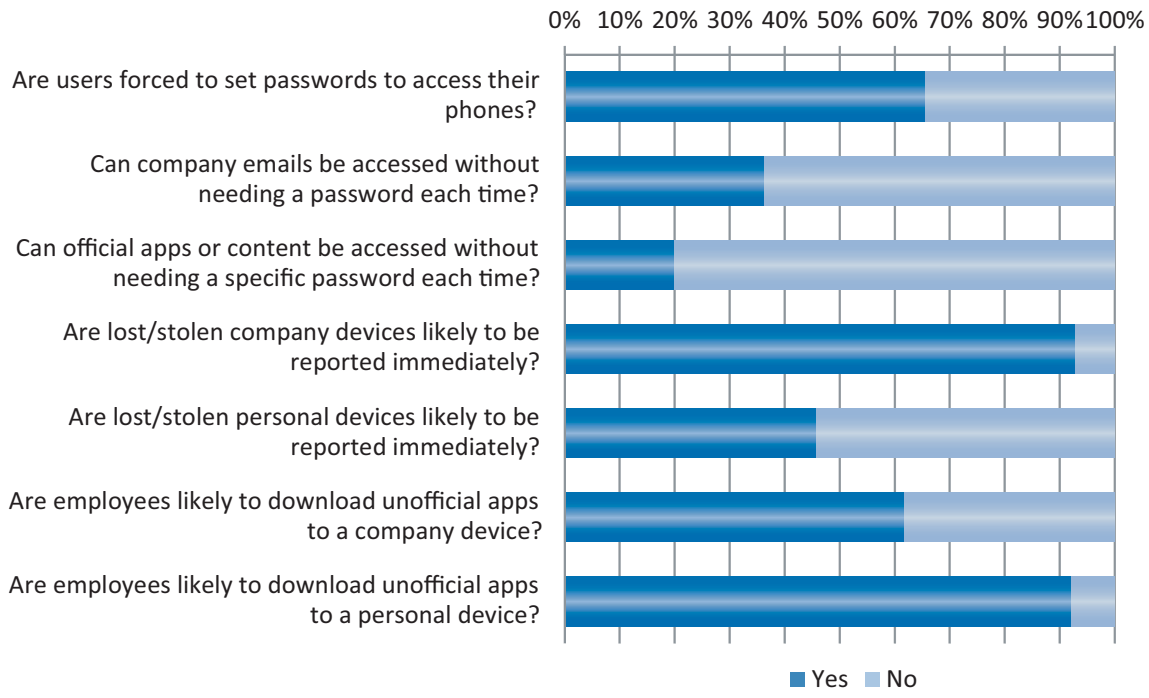
Figure 18: What is the policy on the use of personally-owned mobile devices to access company data? (N=352, excl. 13 Other)



Security

However, of the 56% of organizations who do allow access from personally-owned devices, 33% are relying on employees to comply with policies covering passwords, reporting lost or stolen phones, and data wipe. More worrying are the 9% who allow employees to hook up to company data in an ad hoc way (rising to 17% of smaller companies). This faith in employees' understanding of the potential security implications may well be unfounded.

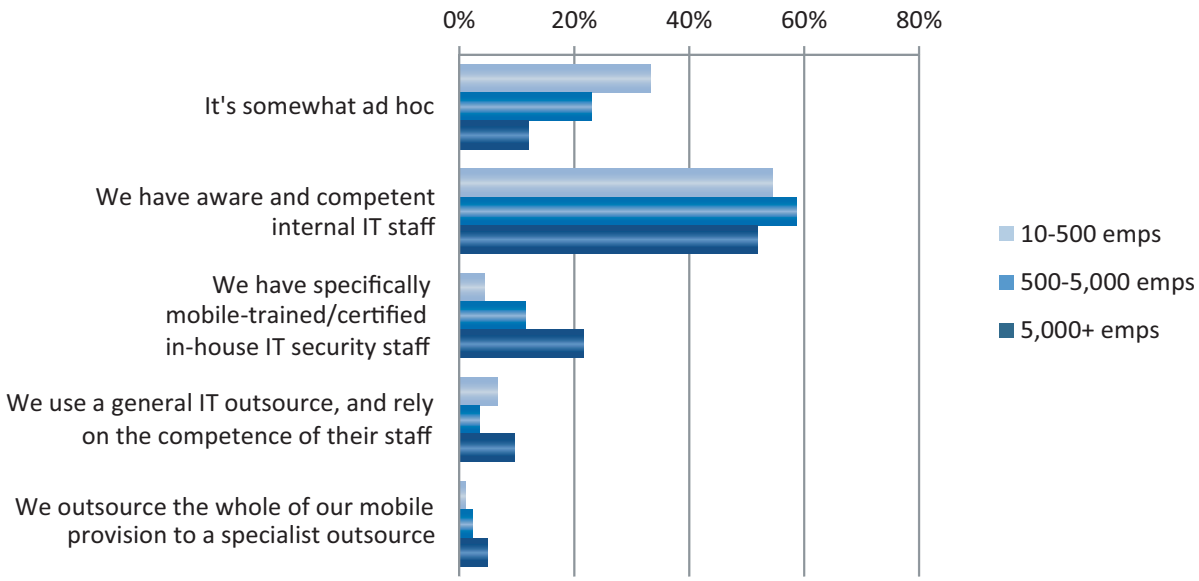
Figure 19: To what extent do you think your employees are aware of, and compliant with, security issues on mobile devices? (N=359, normalized against "Don't Know/Not Applicable")



Flexibility of pass-wording and password retention is very variable between devices, although it can (and should) be controlled by mail-server settings. It is worth noting that even with company-owned devices, 61% of our respondents feel that employees are likely to download unofficial apps.

Mobile security is sure to be a challenge for smaller organizations – a third of respondents admit that it is somewhat ad hoc. However, there are a number of outsource alternatives.

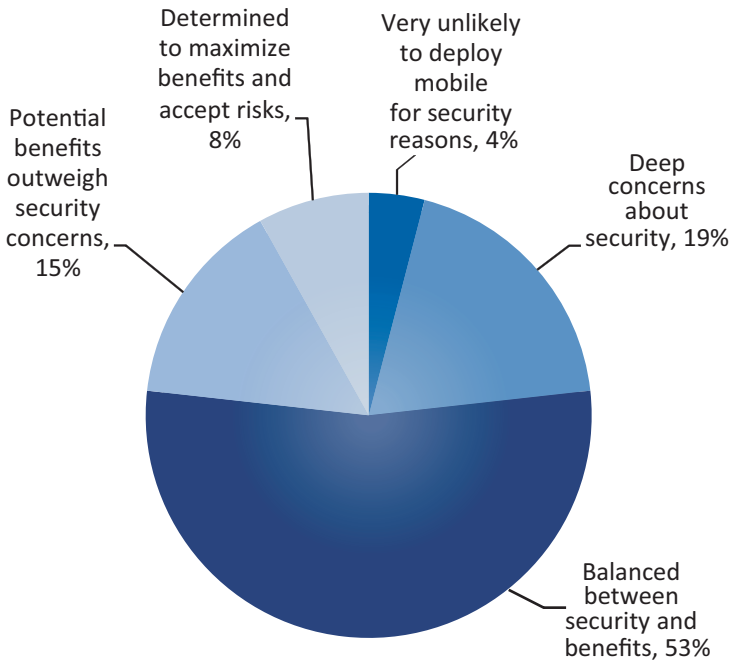
Figure 20: How do you manage your mobile security environment? (N=310, excl. 48 Don't know)



In terms of available security mechanisms, 82% of organizations take the sensible measure of restricting access to company servers with a mobile VPN, and 57% deploy anti-virus/anti-spyware software onto mobile devices. 35% of the largest organizations use two-factor security (e.g., fingerprint, PIN pads, dongles, etc.) compared to 12% of small organizations.

For understandable reasons, there are still very real concerns over mobile security, particularly in very security conscious industries and services, but it is interesting to see how the appetites for mobile deployment are so balanced.

Figure 21: What would you say is the "risk appetite" in your organization for mobile access of company-held information? (N=397)

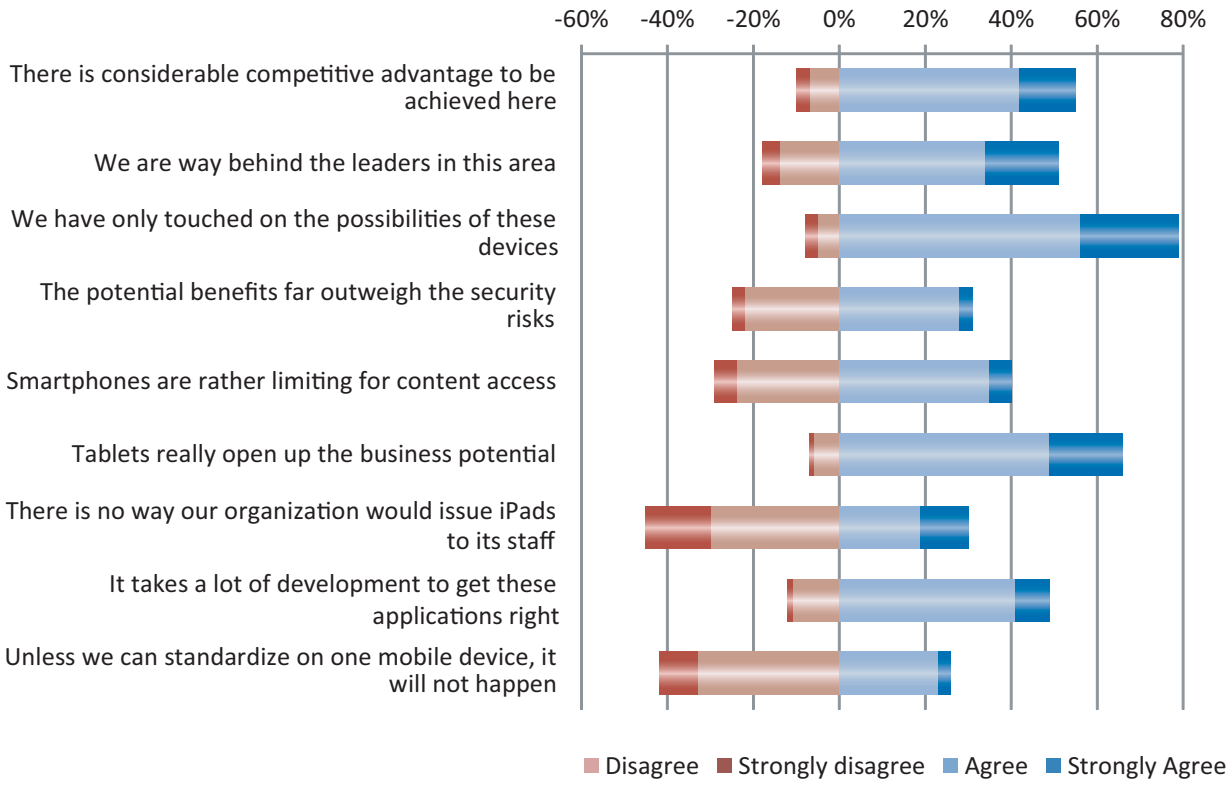


So we see that on one side, 23% have deep concerns about security and on the other, 23% are determined to maximize the potential and accept the risks. 53% take a balanced view.

Mobile Potential and Spend

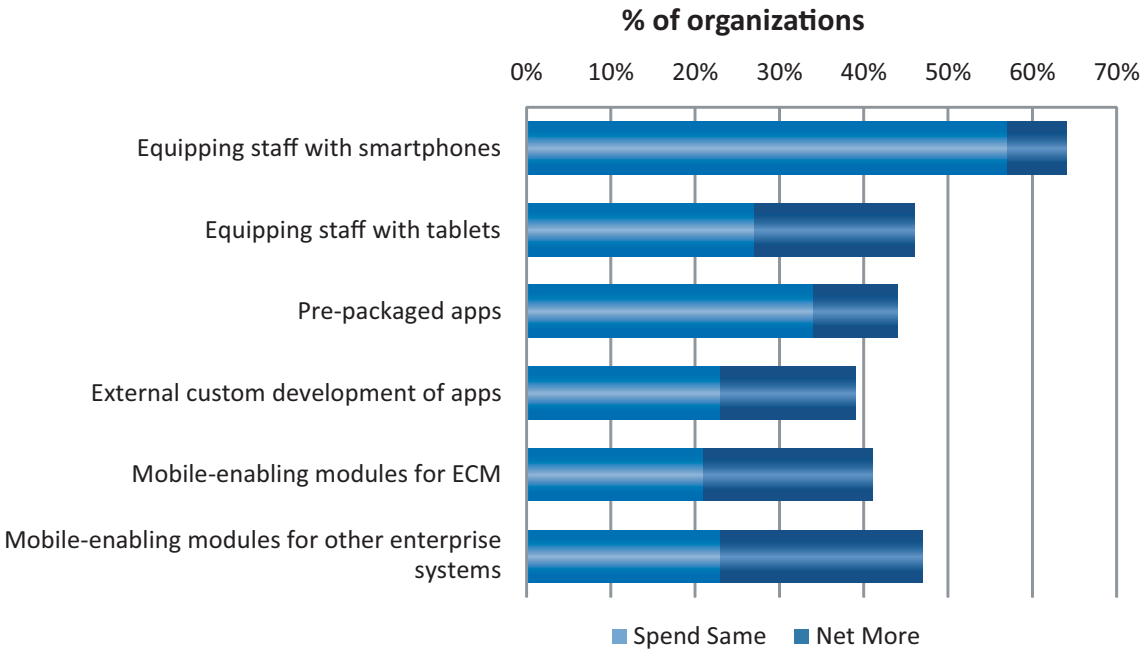
Examining these views more deeply, we asked a series of questions about the potential of mobile applications. The consensus view is that there is considerable competitive advantage to be gained, particularly with tablets. It is important to spend the development effort to get the applications right, and standardizing platforms is an issue, particularly in view of the prevalence of in-house app development.

Figure 22: How do you feel about the following statements regarding mobile applications? (N=359, "Neither Agree nor Disagree" make up to 100%)



Spending on smartphones for mobile email deployment has been on-going for several years, and is set to continue. The number of organizations predicting to spend more on tablets shows strong growth. Mobile modules for ECM and other enterprise systems look set to be increasingly popular, with continued spending on pre-packaged apps.

Figure 23: What are your spending plans over the next 12 months in the following areas? (N=389, Net more is "Spend More" minus "Spend Less"." We don't spend anything on this" makes up to 100%)



Conclusion and Recommendations

Access to email while on the move is by far the most prevalent and successful application for mobile devices. However, we have seen that organizations are beginning to open up mobile access to other enterprise systems such as ECM, CRM and ERP. Although conventional web pages or mobile-access webpages may be adequate, particularly on tablets, dedicated apps are proving to be more successful, particularly where data-fields and numbers are involved, rather than documents and spread-sheets.

The biggest potential benefits are achieved where mobile access is incorporated into business workflows, particularly where new and novel use is made of the smartphone functions: photo, video, sound, geo-location and online connection.

Perhaps due to the slow availability of packaged mobile apps for standard interfaces to ECM and ERP, most organizations are developing their own apps in-house. We have seen that this can cause issues of poor functionality and usability, and can also present a challenge to data security. As many organizations are now opening up access to personally owned devices, these in-house developed apps are also being required to work across multiple device operating systems.

Allowing user-owned devices to access company systems also requires much tighter governance. In many organizations, particularly smaller ones, usage policies and security policies are still not in place, and even where these policies exist, many employees are ignoring best practice as regards passwords, lost phones and remote data-wipes.

Recommendations

- Ensure that you have a usage policy in place for mobile devices that access company systems or data, and that employees are aware of it. If they wish to use personal devices, ensure they sign up to passwords, remote data wipe and other security requirements.
- Evaluate available system access apps from your enterprise system suppliers for standard corporate applications – ECM, CRM, ERP, BI, etc.
- Evaluate all company information sources for mobile availability, but check usability and any specific security implications.
- Set up a brainstorming channel amongst employees – and customers - for innovative applications specific to your business or customer offering. Consider offering a prize for the most innovative use of smartphone or tablet functionality.
- Consider a mini-business case for each application:
  - Has it sufficient functionality and richness to be useful?
  - How many device platforms need to be supported?
  - Is the user interface effective on company-preferred devices?
  - Is coverage, battery-life or visibility an issue?
  - Might security be compromised unduly?
  - Is it appealing for users?
  - Will it add value to the process and save time or reduce costs?
- Before proceeding, evaluate any available off-the-shelf apps or consider outsourced development or customization by a specialist firm. Only embark on in-house development if you are sure your developers understand security and usability issues, and are prepared to keep up with device developments. Set a target for benefits to be achieved and costs incurred.
- If you are developing applications or having them developed, utilize a Mobile Application Development Platform, where you can create an app once and publish it for multiple devices, and where content interfaces and security will be underwritten.

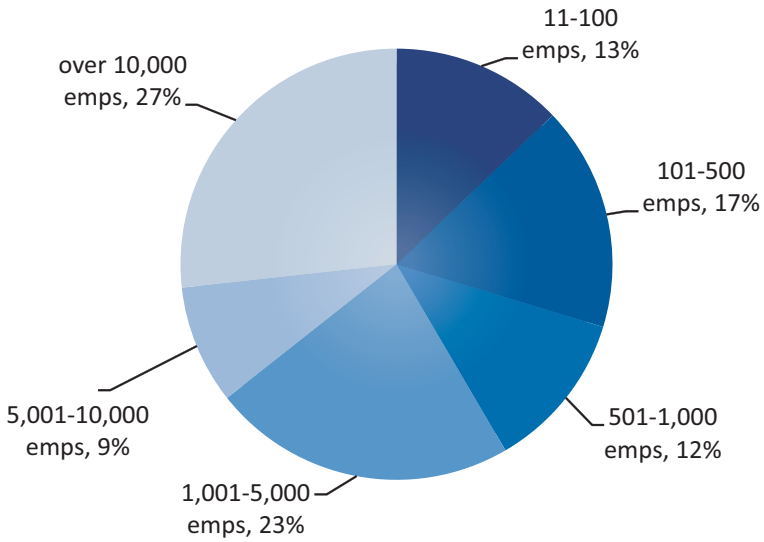
Appendix 1: Survey Demographics

Survey Background

The survey was taken by 426 individual members of the AIIM community between 02 September 2011 and 13 September 2011, using a web-based tool. Invitations to take the survey were sent via email to a selection of the 65,000 AIIM community members

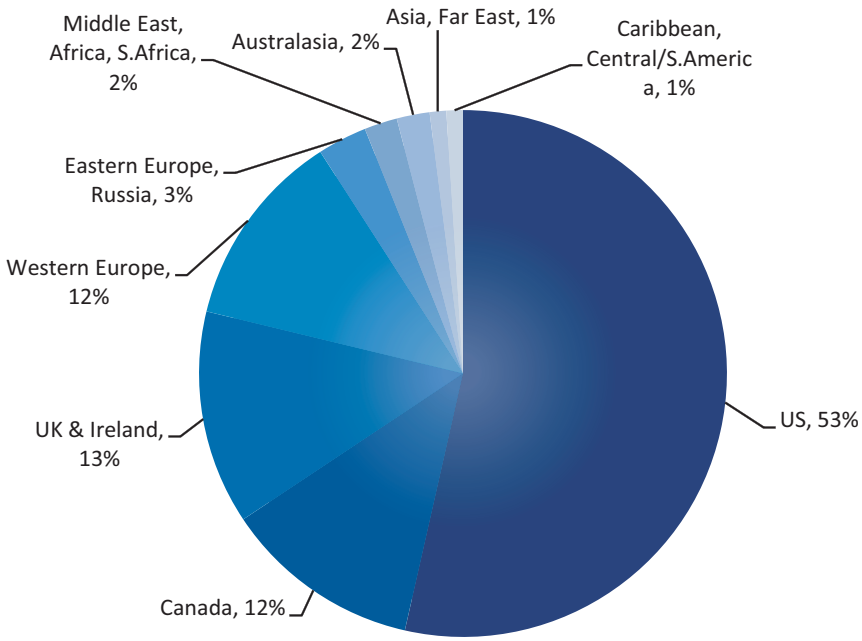
Organizational Size

Organizations of 10 employees or less are excluded from all of the results in this report. On this basis, larger organizations (over 5,000 employees) represent 36%, with mid-sized organizations (500 to 5,000 employees) at 35%. Small-to-mid sized organizations (10 to 500 employees) are 30%.



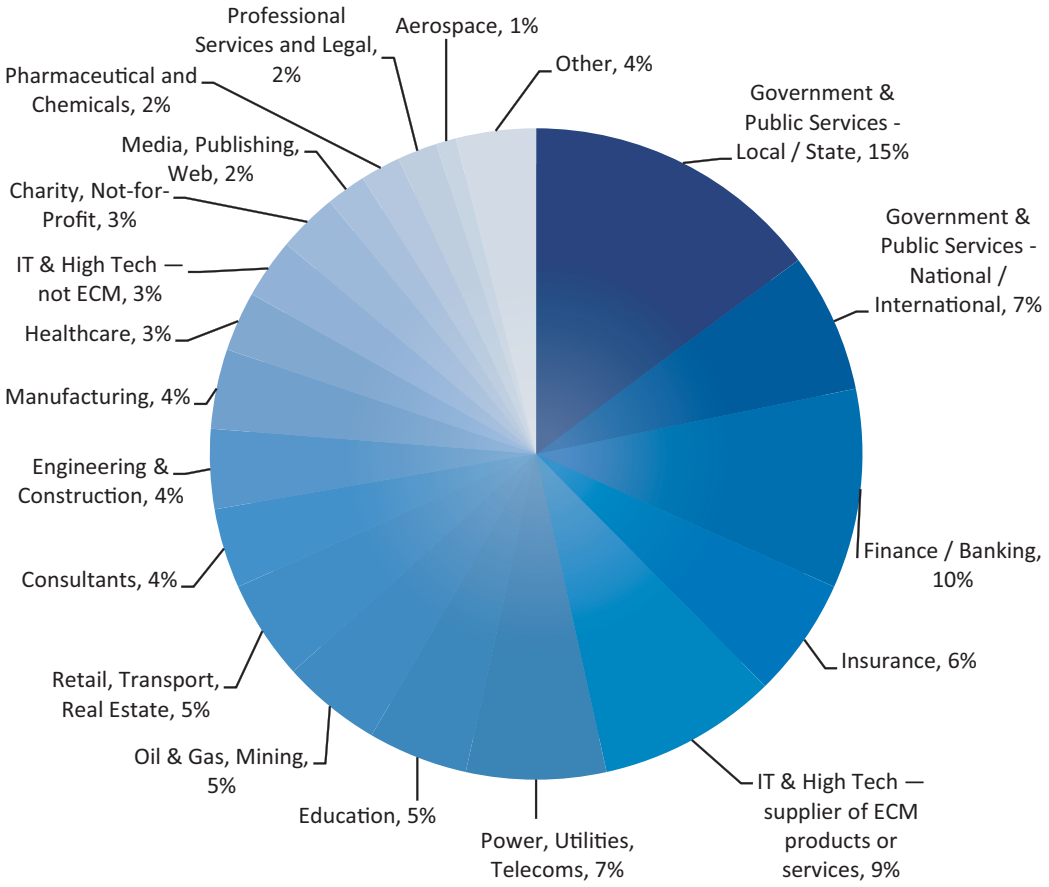
Geography

US and Canada make up 65% of respondents, with 28% from Europe.



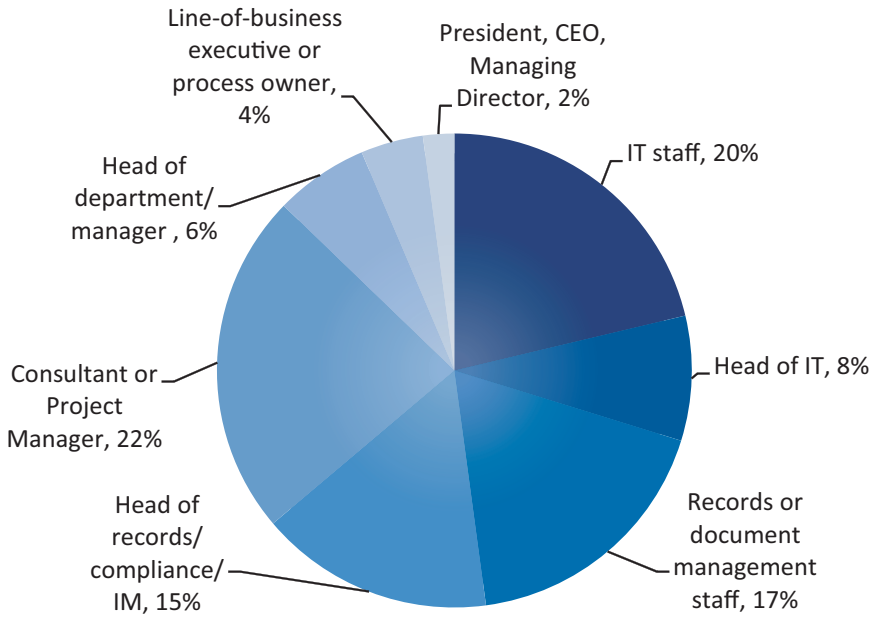
Industry Sector

Local government and public services represent 15%, and national government 7% - lower overall than most AIIM surveys. Finance, Banking and Insurance represent 16%. The remaining sectors are evenly split.



Job Role

Records or Information Management disciplines make up 32% compared to 28% from IT, although a further 22% are consultants or project managers. Line of business managers make up 12%.



Appendix 2: Open ended comments:

"What comments do you wish to make about the benefits and issues of mobile applications and information access in your organization?"

- As an organization, we have rolled out a mobile app to one business unit, and they seem to be doing it well. I can't wait for the explosion of apps, and resources needed to support those apps, to be explored by the rest of our companies... This could be a very exciting time in technology!
- I think they have potential to deliver significant ROI, but each app must be fully researched and tested to confirm that potential ROI.
- I would like to use a smart phone to access ECM but we are waiting on the ECM company to finish creating the App.
- Lots of potential but a lot of cultural challenges
- Most applications used are purely communication, web site browsing for information, but the security issues outweigh all productivity issues.
- Most IT departments are coming out of their slumber and reluctantly embracing these devices as non-IT staff have started touting them.
- Only a few top managers use mobile devices, and they're pretty incompetent at it.
- The biggest issue is usability, eg smartphones have small screen that are not suitable for looking at diagrams, etc. - VPN security on blackberry/tablets is deemed same as VPN security on laptops.
- They provide a very high ROI
- We need iPads!

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AIIM (www.aiim.org) is the community that provides education, research, and best practices to help organizations find, control, and optimize their information.

For over 60 years, AIIM has been the leading non-profit organization focused on helping users to understand the challenges associated with managing documents, content, records, and business processes. Today, AIIM is international in scope, independent, implementation-focused, and, as the representative of the entire ECM industry - including users, suppliers, and the channel—acts as the industry's intermediary.

AIIM
1100 Wayne Avenue, Suite 1100
Silver Spring, MD 20910
301.587.8202
www.aiim.org

AIIM Europe
The IT Centre, Lowesmoor Wharf
Worcester, WR1 2RR, UK
+44 (0)1905 727600
www.aiim.eu