

EMC My Documentum and Microsoft Office and SharePoint Server

A Detailed Review

Abstract

EMC[®] My Documentum[®] for Microsoft Office and My Documentum for Microsoft SharePoint provide access to Documentum's ECM capabilities from within the familiar and intuitive Microsoft Office and SharePoint applications. By using My Documentum and Microsoft Office, knowledge workers can share and work with content to meet today's 24 x 7 competitive business requirements, while also being immediately productive and maintaining the integrity of corporate data. My Documentum works with Microsoft Office, Outlook, and SharePoint 2007, both online or offline. By working together, Microsoft Office and EMC Documentum allow enterprise knowledge workers to share, secure, manage, and store information from within applications they are most familiar with.

For the latest information on these Microsoft and EMC products, please see <http://www.microsoft.com/office> and <http://www.emc.com/mydocumentum>.

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Table of Contents

Executive summary	4
Introduction	4
Audience	5
Introduction to EMC My Documentum	5
The My Documentum family	6
My Documentum for Microsoft SharePoint	7
My Documentum for Desktop	8
My Documentum for Microsoft Outlook.....	9
Microsoft Office and My Documentum features chart.....	11
Conclusion	11
Additional information.....	12

Executive summary

EMC and Microsoft® have a unique, multi-level executive relationship and a global, customer-centric alliance that is committed to helping our mutual customers achieve a faster return on their IT investments with lower risk and improved access to information across their Microsoft application environments.

EMC and Microsoft are working together to create comprehensive solutions for enterprise content management that leverages the power of EMC® My Documentum® and the Documentum Content Server to improve how knowledge workers utilize information wherever it lies, ultimately helping mitigate risks, reduce costs, and improve IT efficiencies.

End users want to take advantage of Microsoft Office and SharePoint as the ubiquitous user interface for business applications. They want to be able to create content in Office and SharePoint, then manage content securely in Documentum for broader solutions, workflows, retention policies, and good governance. EMC's strength lies in the areas of content archiving, governance, retention management, and compliance. With Documentum, low-use content can be kept for a long time in lower-cost storage facilities. Attached to this is an element of corporate governance, as once content is in a Documentum repository, Documentum has several retention management and formal records management capabilities that can be leveraged to align with corporate compliance requirements, including stringent U.S. Department of Defense requirements, for records. Documentum provides the ability to leverage content management within almost any application, and provides an all-in-one business process management experience, empowering users to configure their work the way they want and need to. Documentum mitigates new elements of risk by providing end-to-end XML, high-volume content processing, and records management for the extended enterprise, and gives IT the tools they need to create a flexible, scalable, high-performance, compliant content infrastructure.

EMC's integrations and product strategy around Microsoft Office and SharePoint go beyond just Documentum applications. EMC provides a range of information infrastructure solutions for Office and SharePoint that include tiered and unified storage to drive performance and scalability; virtualization to provide lower total cost of ownership and flexibility; backup and recovery to ensure data availability; business continuity solutions to provide operational consistency and rapid recovery; enterprise content management support that promotes compliance and good information governance; and robust document security management.

Now, with the My Documentum solution from EMC, enterprise users can have access to business-critical content using applications that they use every day, and their work is not interrupted by switching between applications, learning a new interface, or locating a new source of data. Instead, they work within Outlook, SharePoint, or other Office applications such as PowerPoint and Excel. The availability of EMC's My Documentum for SharePoint, My Documentum for Outlook, and My Documentum for Desktop means that content management is now seamlessly a part of a knowledge worker's job and is just an extension of what they were already doing.

Introduction

This white paper includes the following sections:

- Introduction to EMC Documentum and Microsoft Office and SharePoint technology
- Business value of Documentum and Microsoft Office business applications and Microsoft SharePoint Server
- Introduction to the My Documentum product family that includes Documentum integrations into Microsoft Office Business applications and SharePoint
- Description of the components of the My Documentum Family – My Documentum for Microsoft Outlook, My Documentum for Desktop, and My Documentum for Microsoft SharePoint
- Conclusion with a focus on the unique alliance between EMC and Microsoft

The objective of this white paper is to inform and educate customers about EMC and Microsoft's unique multi-level alliance, with a focus on joint product development, sales, and marketing activity. This white paper talks exclusively about Documentum's integrations with Microsoft business applications such as Outlook and Microsoft SharePoint. With the My Documentum product family from EMC, enterprise users can have access to business-critical content using everyday applications such as Outlook, SharePoint, or other Office applications such PowerPoint and Excel. Now, content management is seamlessly a part of a knowledge worker's job and is just an extension of what they were already doing. End users can leverage Microsoft Office and SharePoint as their primary familiar user interface, while managing content securely in Documentum for broader solutions, workflows, retention policies, and good governance.

Audience

This white paper is intended for joint Microsoft and EMC customers that are looking to provide their users with intuitive solutions to access, share find, secure, and manage information from within common Microsoft Office business applications. This white paper is intended for all audiences, both technical and line of business. It describes how Microsoft and EMC Documentum can jointly meet the information management needs of your end users.

Introduction to EMC My Documentum

EMC's My Documentum family of products, working together with Microsoft and its Office suite of products, gives knowledge workers the ability to secure, store, and manage business-critical information using familiar business applications including Microsoft Office, Microsoft Office SharePoint, and Windows Explorer. Unlike most other enterprise content management (ECM) applications, My Documentum and Microsoft Office are well integrated, allowing workers at all levels to use these familiar applications to perform basic content services with minimum training. My Documentum users can take advantage of Desktop and Offline capabilities to access, check in, and check out information with support for lifecycles and versioning. Working together, these capabilities ensure business-critical information is secured and archived for governance and compliance purposes.

The My Documentum family

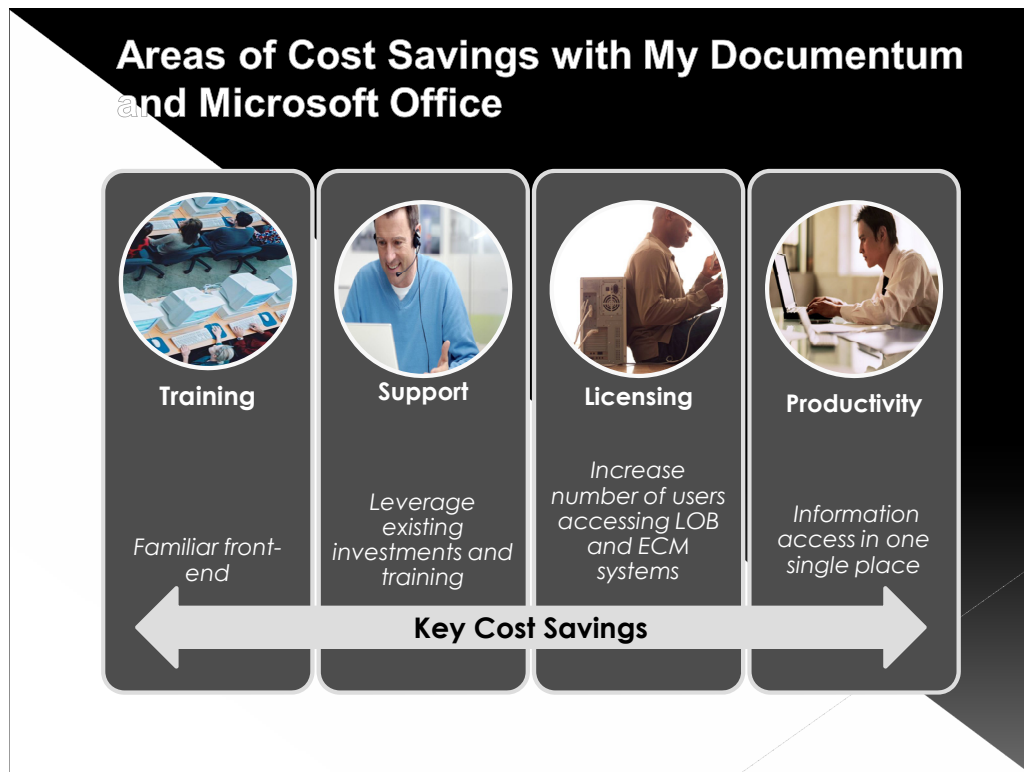


Figure 1. How My Documentum helps provide key cost savings

By using My Documentum and Microsoft Office, knowledge workers can use their favorite business applications while adding ready access to ECM functionality. This allows those knowledge workers to:

- Store business-critical content for e-Discovery and litigation requests
- Find relevant information faster and more easily by searching the repository to locate content
- Manage content even while offline and disconnected from the repository, and to have access to the latest versions of the content and work while offline
- Import content in the repository to comply with regulatory requirements or company policies
- Share repository-based content

The My Documentum family is comprised of the following major components/products, each of which is integrated with Microsoft Office. The components are:

- My Documentum for Microsoft Outlook
- My Documentum for Desktop
- My Documentum for Microsoft SharePoint

Let's take a closer look at each of these products.

My Documentum for Microsoft SharePoint

My Documentum for Microsoft SharePoint provides seamless access to Documentum via the familiar SharePoint interface and native repository services. SharePoint users get direct access to Documentum, providing a single corporate repository and content services for a wide variety of sites throughout the enterprise.

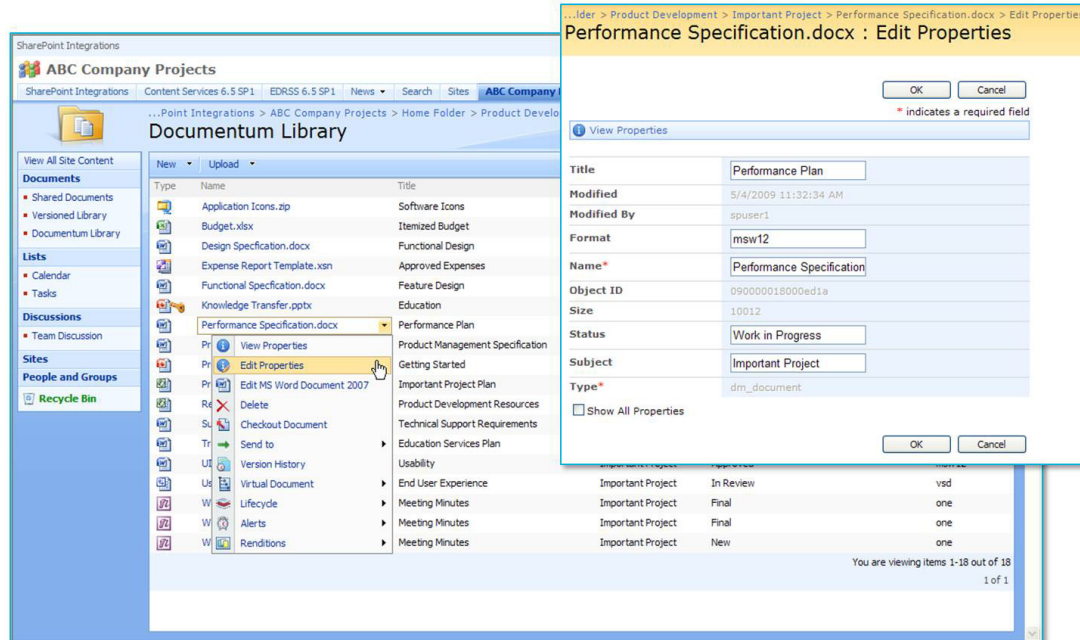


Figure 2. My Documentum for Microsoft Outlook is Documentum's native integration with the Microsoft Outlook interface

This seamless integration of the EMC Documentum Content Server with Microsoft Office SharePoint Server 2007 enables organizations to leverage SharePoint as a client to the Documentum repository where enterprise content is securely stored and managed. As a result, organizations can:

- Expand the reach of content management throughout the organization. This includes compliance and management needs as well as knowledge worker usability considerations
- Provide advanced content protection through a single security model applied to all content, regardless of the application being used
- Extend Microsoft Office SharePoint by providing seamless access to Documentum Content Server's scalable, regulated infrastructure within the enterprise content architecture
- Configure their content environment to meet organizational requirements by emulating a native SharePoint user experience, while exposing enhanced content management capabilities
- Make use of Documentum Web Parts to offer seamless, direct user access to business-critical capabilities provided by the EMC Documentum Content Server via the SharePoint interface
- Provide the full benefit of enterprise content management to the SharePoint user population while maintaining an appropriate level of centralized document control and policy management

Enterprises are faced with a growing array of regulatory and industry requirements for security and compliance. As a result, these organizations must ensure that mission-critical information, as well as information that is regulated by security, privacy, or disclosure rules, is created and stored securely, and kept in accordance with those regulations that affect their industry. Once content is in a Documentum repository, organizations can leverage the full capabilities of the EMC Documentum content management platform to secure and manage content. My Documentum for Microsoft Office SharePoint makes this

content and the associated control and compliance capabilities available within the SharePoint user interface in a seamless manner.

My Documentum for Desktop

My Documentum for Desktop exposes Documentum to the user's desktop and provides native access to Documentum from within Windows Explorer. This provides transparent repository access with a minimal learning curve from many Microsoft Office applications.

The key features and benefits that users derive from My Documentum for Desktop include:

- Documentum is exposed as a file share on the user's Windows desktop using Windows Explorer.
- The Documentum share has native support at the OS level.
- My Documentum for Desktop includes support for distributed content.
- Repository access is transparent, and there is little to no learning curve.
- Applications, such as Microsoft Office Excel and PowerPoint, can access data in Documentum directly.
- Documentum Desktop includes data integrity features such as an Ingest Progress Monitor that accepts updates as a single commit to the server, while allowing the user to continue working.

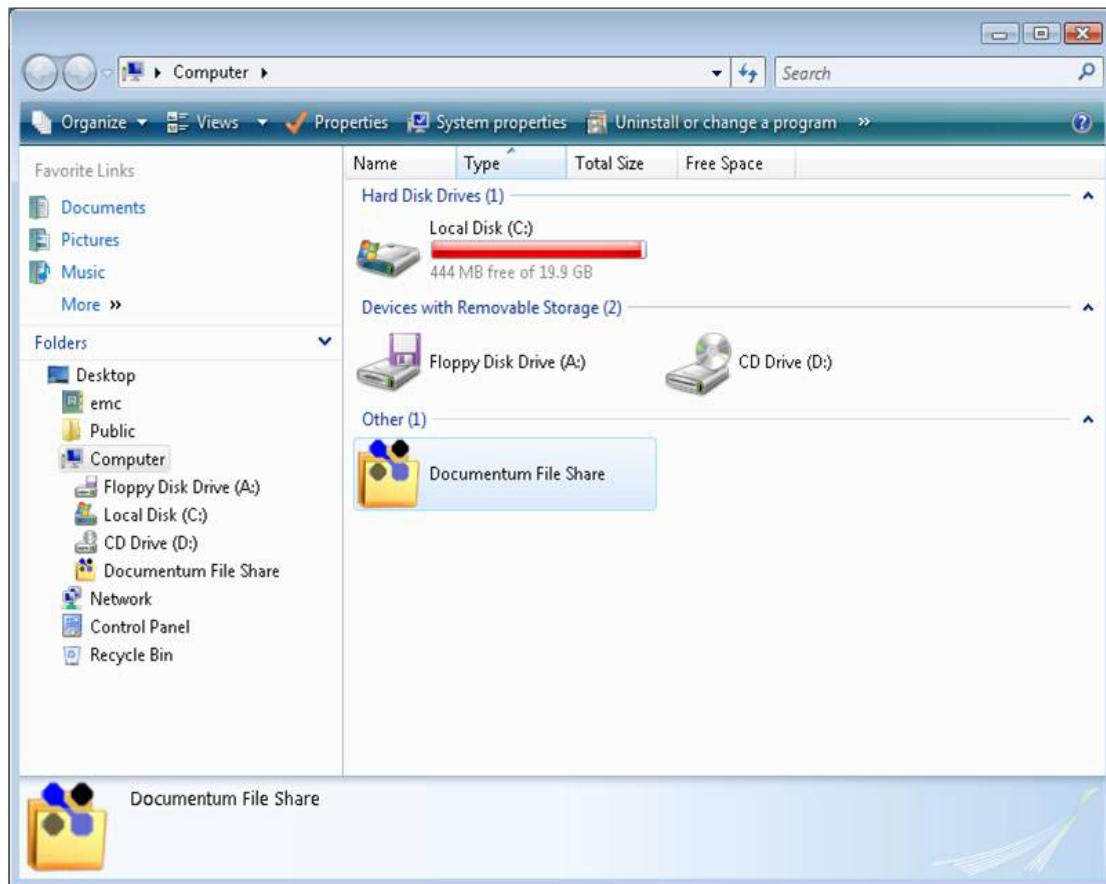


Figure 3. Transparent access to Documentum from within Microsoft Office Business Applications

- Documentum Desktop supports inter-linking of Microsoft Office Objects Docbase Linking.
- Documentum services are available to users with a simple right-click on Documentum objects.

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- Documentum supports distributed deployments in both synchronous and asynchronous modes. Metadata is immediately written to the database and is indexed and searchable. Cached content includes all permissions and entitlements, which are enforced.

My Documentum for Desktop acts as an extension to the desktop and provides transparent, friction-less access to basic content management capabilities from within the familiar Windows Explorer and MS Office interface. The product exposes a lightweight set of content management capabilities and allows content to be opened and saved directly to the Documentum repository through the certified set of MS office business applications.

My Documentum for Microsoft Outlook

My Documentum for Microsoft Office Outlook 2007 provides native integration with the Outlook interface, which allows users to capture and manage content via e-mail. This gives knowledge workers the ability to secure, share, find, and manage information in the corporate repository from the familiar Microsoft Office Outlook environment. Now, knowledge workers do not have to learn to navigate new applications. They can continue to work within the familiar Outlook interface and save and secure all e-mail and associated content in Documentum.

The latest release enables workers to employ Outlook's native menus and toolbars to easily find, store, and manage e-mails and documents in the repository. A few of the focus areas for this new release are:

- Personal productivity – My Documentum completely adopts the Microsoft Office Outlook interface already familiar to users, including integration with Outlook's menus, views (tree view, list view) toolbars, preview panes, search, and folder structure. The addition of a Documentum toolbar aids access and ease of use.
- Archiving and compliance – My Documentum leverages the Outlook rules engine to automatically import content and includes a one-step send-and-save operation that can simplify the process of compliance.
- Knowledge management – Uses the Microsoft Office Outlook interface as a single point of entry for both e-mail and access to content in Documentum for viewing, updating, or managing, either online or offline.
- The Microsoft Office Outlook search capability is expanded to include Documentum folders, and can be based on properties and content.
- Metadata management – Comprehensive metadata management such as folder-attribute inheritance and the ability to send metadata during multi-select operations. Documentum repository objects such as e-mails, attachments, or documents can be classified with metadata fields such as sender, recipient, date sent, date received, size, file type, and format as well as specialized types that can be tailored to the organization.
- Working online and offline – My Documentum and Microsoft Office Outlook can work in both online mode and offline mode without a connection to the Documentum repository. When working offline, Outlook performs content synchronization when the application is started and is connected to the repository. In the event of a collision, an application presents a choice of options for the user to resolve.

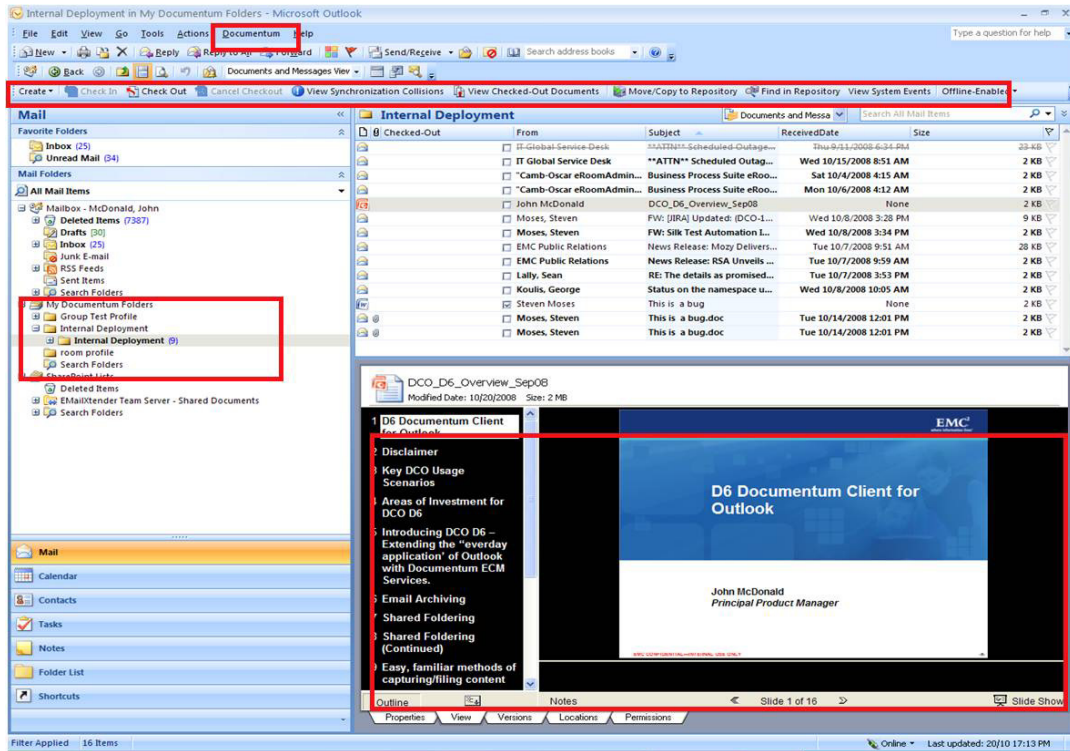


Figure 4. The familiar Microsoft Outlook interface delivers powerful content management features

By using the familiar Outlook interface, My Documentum for Outlook delivers many benefits, including:

- Increase user adoption of ECM capabilities by providing access to Documentum from within the familiar Outlook interface.
- Enterprises maintain control over intellectual property.
- Knowledge workers can continue to work within Microsoft Office Outlook as they currently do, and simply add to their productivity without having to switch applications

Microsoft Office and My Documentum features chart

Table 1. Features supported by Documentum in Microsoft Office business applications

Feature/Functionality	My Documentum for Microsoft Outlook	My Documentum for Microsoft SharePoint	My Documentum for Desktop (Windows Explorer and Office integration)
Store e-mails in the Documentum repository directly from Microsoft Outlook	✓		
Check-in/check-out	✓	✓	✓
Work-in place link management			✓
Leverage Outlook profile object to control access to Documentum folders	✓		
Synchronized local cache for offline	✓		
Conflict resolution mechanism	✓		
Versioning	✓	✓	✓
Full text search	✓	✓	
Simple search	✓	✓	✓
Metadata management	✓	✓	✓
Branch office caching support		✓	✓

Conclusion

By working together, Microsoft Office, Microsoft SharePoint, and EMC's My Documentum product family give users direct access to business-critical content, and access to content management directly from within Microsoft Office. This gives enterprises the ability to provide access to information without having to move knowledge workers away from familiar applications, which reduces or eliminates training and conversion costs while increasing worker productivity. Knowledge workers can access the latest versions of content online or offline, and leverage basic content services from within Microsoft Office Outlook, Microsoft Office SharePoint, and other Microsoft Office applications including Excel and PowerPoint without having to learn a new interface, or even having to switch from one application to another.

The integration, flexibility, and familiarity of Microsoft Office working together with EMC's My Documentum increases the use of enterprise content management, while bringing every worker the benefits of being able to use services such as check-in, check-out, versioning, and content lifecycles. This in turn gives the IT department quicker ROI by bringing content management online more quickly, while also

protecting data integrity, and providing support for regulatory compliance, data preservation, e-discovery, and data security provided by the Documentum repository.

Together, Microsoft Office and My Documentum give enterprises a new level of data management while also improving their cost structure and productivity and lowering the risk of data loss. The new level of access in today's 24 x 7 competitive environment, combined with lower costs and greater security, make enterprise data available, and provide a competitive advantage that's not available elsewhere.

Additional information

2007 Microsoft Office 2007 websites include the following. For questions, please e-mail Microsoft@emc.com or Carl Shanahan, Director of the Microsoft Business Alliance, at shanahan_carl@emc.com.

- <http://www.microsoft.com/office>
- <http://www.microsoft.com/emc>

For more information on EMC My Documentum, visit <http://www.emc.com/mydocumentum>.

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