

# Intellective and OpenText provide a 360-degree view of content and workflows across MS Dynamics, Salesforce, nCino and more

### **Seamless Content Search and Management**

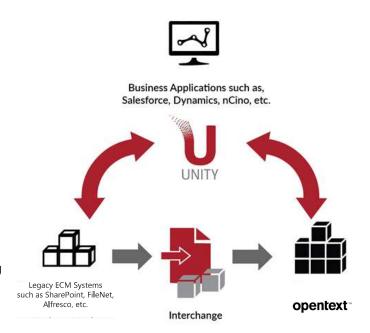
Intellective Unity connects content stored and managed in OpenText with line-of-business applications and CRM systems, including Dynamics, Salesforce, nCino and more. It allows users to seamlessly search for and manage documents, tasks, and data across multiple ECM (Enterprise Content Management) and BPM (Business Process Management) systems, whether on premises or in the cloud, directly from CRMs, business applications or directly from Unity's own Web Application User Interface.

In addition, Intellective's Interchange solution was developed to reduce the cost, timelines, and risk of performing migrations from legacy ECM systems to OpenText. Leveraging Interchange with Unity's ability to seamless search across multiple content repositories, allows organizations conduct their business process uninterrupted during migrations. This in turn will improve OpenText's value proposition, user adoption and overall usage.

## **Intellective Partners with OpenText**

Intellective's partnership with OpenText allows us to deliver direct access to the content stored across one or multiple content repositories on a continuous basis. By eliminating the time-consuming process to search for information in multiple repositories, Unity improves productivity and provides the ability to meet internal and external SLA's. If you face legal, financial, or regulatory requirements related to content and workflow management, our partnership with OpenText helps you improve operations to meet specific dates and adhere to requirements.

Unity's ability to integrate content, process and data across multiple repository and applications allows CIOs and CTOs responsible for digital transformations to maximize their existing technology investments resulting in improved operational efficiencies, reduced cost and enhance customer satisfaction.



# Benefits of Intellective Unity and OpenText:

- Consolidates your view of content that is dispersed across multiple ECM silos
- Delivers a single interface for content, streamlining the execution of critical business processes
- Enables the migration of documents from one or more repositories to OpenText improving the user experience and reducing operational costs
- Assists with migration of content stored in legacy ECM systems that are no longer supported by the vendor
- Provides immediate access to the content stored across all silos from existing line of business applications and CRMS.



### **How Intellective Unity Works with Opentext**

Unity federated content management framework allows users to search for and manage documents seamlessly across multiple enterprise content management platforms. Each designated user can accomplish the following:

- Open and browse multiple document folders within one interface
- Perform customized searches using specific inclusive or exclusive criteria
- Review content within multiple selectable
   OpenText folders at once
- Search for documents using filter criteria within titles, filenames, meta data, and full document body text
- Define wildcard attributes for inclusive searches
- Add and modify comments associated with each document

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### **Enterprise Searches**

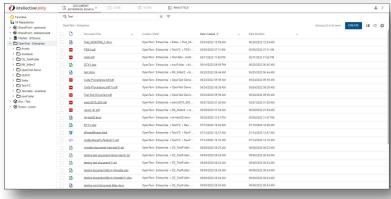
To support multiple departments across the enterprise, Intellective Unity supports various content repositories. With Unity, you can:

- Perform document searches across multiple content repositories, including OpenText (Content Server, Vignette, Documentum, etc.)
- Search text using unlimited length parameters
- Save searches for regular use by team members

### **Document Analytics**

The Unity analytics dashboard provides team management with metrics showing the use and storage of documents in each repository, including:

- The ability to review and measure document use by repository, file type, creation date, and by creator
- Reveal details about each analytics component using hover textand drill-down features
- Set filters and create multiple dashboards for regular review





Intellective Unity works with OpenText to deliver a seamless, intelligent view of all documents stored in the organization's multiple document repositories, improving efficiency, raising productivity, and helping the business fulfill the needs of sales, service, and leadership teams.

Contact Intellective today at partners@intellective.com.

