

MARKETFOCUS REPORT

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*Executive Brief:*

## Functional Assessment of Open Text Livelink



# Table of Contents

<b><i>Introduction .....</i></b>	<b><i>3</i></b>
<b><i>Functional Review of Open Text.....</i></b>	<b><i>4</i></b>
<b><i>Company and Product Background.....</i></b>	<b><i>4</i></b>
<b><i>Product Overview and Strategic Value .....</i></b>	<b><i>5</i></b>
<b><i>Application Capabilities .....</i></b>	<b><i>6</i></b>
<b><i>IT Platform and Architecture.....</i></b>	<b><i>8</i></b>
<b><i>Key Strengths and Challenges.....</i></b>	<b><i>9</i></b>
<b><i>Conclusion.....</i></b>	<b><i>9</i></b>
<b><i>Product Snapshot .....</i></b>	<b><i>10</i></b>
<b><i>Appendix: About Doculabs .....</i></b>	<b><i>11</i></b>

# INTRODUCTION

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If current trends are any indication, document management (DM), digital asset management (DAM), and web content management (WCM) products are converging on the content management (CM) space. This is causing plenty of confusion in the user community over the important characteristics that CM solutions ought to provide.

With so many players, all with various business focuses in the CM market, it is difficult to differentiate between the products and identify which systems offer the best fit for particular applications. Certain vendors provide CM solutions that are particularly well suited for particular markets in the user community. Others provide broad-base solutions that provide for a wider range of CM needs.

One vendor that provides a solid solution for a wide range of CM needs is Open Text Corporation. The company's Livelink product provides an integrated solution for the full life cycle of document management and content management on the web. With a broad range of platform support and integration capabilities, Livelink has the ability to fulfill many businesses' content management needs.

Doculabs recently conducted a formal evaluation of Open Text's Livelink 8.1.3 with Livelink Search Upgrade, as part of our benchmark study of content management applications. This executive brief reviews Open Text's software from a functional and technical perspective, describes the product's strategic benefits, and identifies its major strengths and areas for enhancement.

# FUNCTIONAL REVIEW OF OPEN TEXT

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This section provides an overview of Open Text and our detailed review of the company's Livelink 8.1.3.

## Company and Product Background

Founded in 1991, Open Text is headquartered in Waterloo, Ontario, with development offices outside of Chicago, Illinois; Detroit, Michigan; Columbus, Ohio; and in Ottawa, Ontario. Its European operations are headquartered in London. The privately held company (NASDAQ: OTEX; Toronto Stock Exchange: OTC) currently has an estimated 800 employees, and reported revenues of approximately \$92.5 million in 1999.

Open Text products enable the development of intranets and extranets by providing a feature-rich environment for knowledge-based and collaborative processes in corporations and other organizations. Livelink, Open Text's web-based enterprise solution, is designed to facilitate innovation and collaboration throughout an organization.

The Livelink product offers DM, knowledge management, and workflow capabilities out of the box. Key capabilities include virtual team collaboration, information retrieval, business process automation, and enterprise group scheduling.

In addition, the Livelink Desktop provides integration with Windows Explorer, Microsoft Office, and Adobe Acrobat, as well as any application that complies with ODMA version 2.0. Open Text also offers several packaged integration modules such as Activators for Lotus Notes, SAP R/3, BASIS, and CORBA.

With an installed base of over 3 million users worldwide in approximately 3,600 customer organizations in 31 countries, Open Text has become a major supplier of DM and knowledge management solutions.

Open Text sells Livelink directly, as well as through more than 100 channel partners worldwide. The company also has technology partnerships with Microsoft, Adobe, SAP, and J.D. Edwards.

## Product Overview and Strategic Value

Livelink is a feature-rich product, offering robust DM, knowledge management, workflow functionality, and full-text search and retrieval out of the box. Moreover, Livelink is one of the few products developed exclusively for the web. The Livelink product family for document and WCM includes:

- ***Livelink***  
Livelink provides virtual project collaboration, standard library services, custom attributes and categories, task management, threaded discussions, news channels, event auditing, and on-the-fly conversion to HTML for viewing.
- ***Livelink Desktop***  
Livelink Desktop provides Windows desktop application integration to the Livelink server.
- ***Livelink Transit Central e-Publisher***  
This integration with InfoAccess Transit Central is a standard Livelink module – it allows the Livelink repository to act as the content manager from which Transit Central can publish to Internet, intranet, and extranet servers.
- ***Livelink Workflow***  
Collaborative in nature, Livelink Workflow is designed for the automation of business processes, including routing and approval of documents and work packages (it is not designed to be a high-volume, transaction-based system).
- ***Livelink iRIMS***  
As a result of Open Text's purchase of PSSoftware Solutions, the iRIMS record management product is now integrated with the Livelink suite, and provides web-based records management.

To be competitive in today's business environment, organizations must be web-enabled and have instantaneous access to corporate information. With a focus on out-of-the-box, web-accessible, and integrated information management, Livelink is a promising and viable solution for almost any industry or organization.

## Application Capabilities

With a focus on project management, the Livelink product suite provides standard DM functionality, all of which, including administration, is accessible through a browser. Livelink offers extensive search capabilities, including full-text, metadata searching, key phrase detection, and relevancy ranking. Search types include Boolean, proximity, thesaurus, similar-sounding words, and stemming.

The following figure shows some of Livelink's search options.

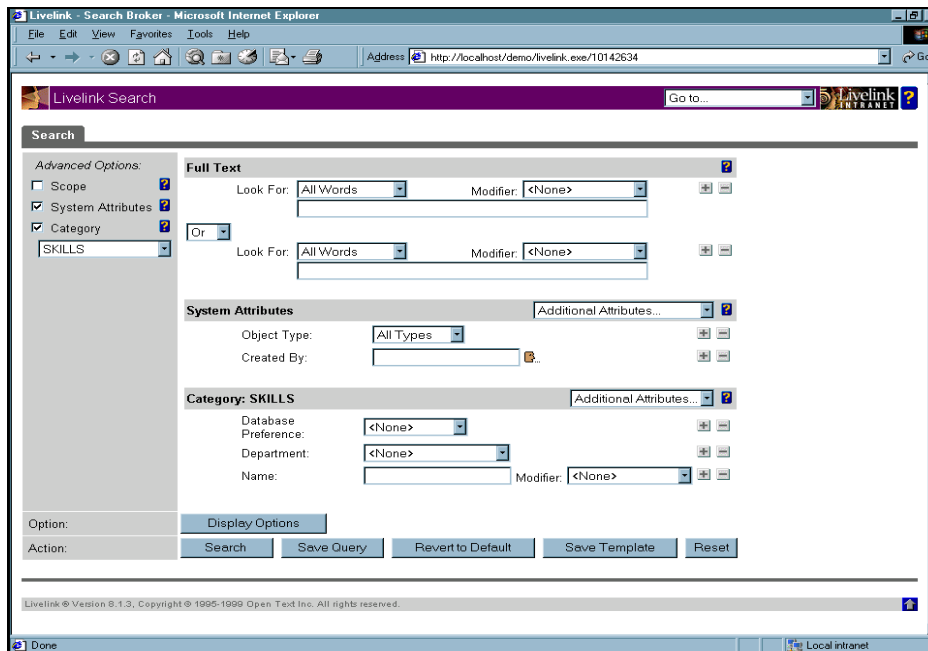


Figure 1 – Livelink Search Screen

Retrieving documents for editing is a two-step process. While users receive a search results list in the browse or search results page, they must go to the general information page of the desired document to access the check out function.

For initial setup and configuration Livelink includes wizards, which make it easy to set up the server, web server, databases, and indexes. Livelink provides a graphical and easy-to-use web-based administrative interface for centralized or distributed administration of Livelink. It provides consistent access to all functions, including user, database, and general system administration.

Setup of users, groups, attributes and document categories is done through the administrator interface. Any user with appropriate rights can create and modify users and groups. Each user is a member of a department (home) group, but can also be added to other groups. Access to objects is controlled by user and group permissions. The following figure shows the Livelink Administrative interface.

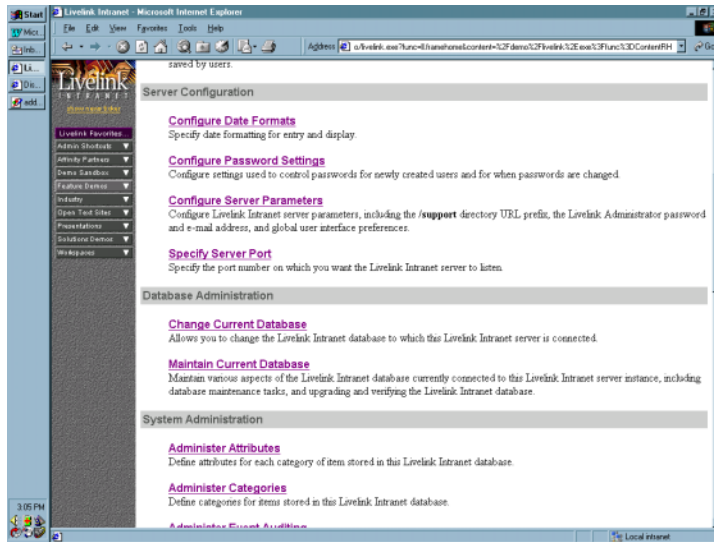


Figure 2 – Livelink Administrative Interface

From the user's perspective, the Livelink repository can be accessed in several ways: through a browser, Livelink Explorer, or Livelink Desktop.

The Livelink browser access provides standard but somewhat limited capabilities. One of the challenges we saw is that the user must control the documents when they are checked out. That is, they must remember where they put the document in order to check it in. This moves the control of the document from the system to the user. We also found that this user interface could be confusing at times because of some inconsistencies among the pages presented to the user.

The Livelink Explorer interface is ActiveX-based and available for Microsoft Internet Explorer users only. It provides better desktop integration than the standard browser access, specifically better check-in/check-out control, and drag-and-drop capability for adding documents to the repository. Of course, the limitation with this interface is the platform support.

Livelink Desktop provides tight integration of DM and desktop applications. This module allows users to add, copy, and check in/check-out documents from their authoring applications. This capability is provided for Microsoft Office, Adobe Acrobat, Windows Explorer, and ODMA-compliant applications.

## IT Platform and Architecture

Livelink is a 32-bit, three-tier system, based on industry and web standards. It supports most desktop applications and file formats, and includes an access tier, a server tier, and a data tier. The access tier provides several options for accessing the information, functions, and services in Livelink. Services include the standard Livelink web interface (accessible via Microsoft Internet Explorer and Netscape Navigator browsers), Livelink Explorer, and the Livelink Desktop.

The Livelink server tier provides all system services and features, including administration utilities to manage all services, agents, user workspaces, and configurations. It is actually multi-tiered, and can be distributed across many servers for scalability.

Within the server layer, Open Text's Livelink Builder and Livelink SDK products provide a complete development environment for Livelink. Specifically, the Livelink API (LAPI) exposes all server functions, and permits integration development in C, C++, Visual Basic, and Java. Extensions to LAPI are also available for DCOM, CORBA, and SAP's BAPI. The server tier also includes an HTTP server for serving Livelink's web pages. Livelink supports the Microsoft Internet Information Server and Netscape Enterprise Server.

The third tier – the data tier – is where the Livelink database, file system, and indexes reside. On the relational database side, Livelink supports Oracle, Sybase, and Microsoft SQL Server. On the file server side, Livelink supports Windows NT, HP-UX, and Sun Solaris.

For security, Livelink includes the Livelink Directory Services module for synchronizing with a centralized directory service and providing unified logon access. This module supports both LDAP and NT Domain registries for synchronization and authentication.

Livelink does not provide document repository replication, but it includes Remote Cache and a cluster architecture. Remote Cache stores local copies of recently requested documents at the remote sites where the users are located. Although this provides faster access to documents after their initial retrieval, the original request must still be fulfilled from the primary Livelink server. The cluster architecture allows customers to set up multiple Livelink servers for the same Livelink database.



## KEY STRENGTHS AND CHALLENGES

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The following table summarizes the strengths and challenges of Livelink.

Strengths	Challenges
<ul style="list-style-type: none"><li>• Full support – including administration – through a web client</li><li>• Extensive and flexible search capabilities on the web client</li><li>• Good selection of packaged connectors to applications (e.g., Lotus Notes and SAP R/3)</li><li>• Integration with LDAP and NT Directory Services for security</li><li>• Provides Microsoft Office, Adobe Acrobat, and ODMA integrations for the Windows desktop (although ODMA is somewhat limited)</li><li>• Good e-mail integration – eLink for threaded discussions and detailed task notification, Change Agents for general event notification, and Livelink Desktop for Microsoft Outlook integration</li><li>• Livelink Remote Cache provides good performance for remote sites</li></ul>	<ul style="list-style-type: none"><li>• Livelink web client requires users to control check-in and check-out locations (unless using Livelink Explorer, which is Microsoft Internet Explorer only, or Livelink Desktop, which is Windows only)</li><li>• No document repository replication</li><li>• Limited out-of-the-box WCM</li><li>• Pricing model may be a challenge</li><li>• Inconsistent user interface</li><li>• No support for mobile users (planned for CY 2000)</li></ul>

*Table 1 – Open Text Strengths and Challenges*

## CONCLUSION

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The Livelink product provides an integrated solution for full life cycle DM on the web. With its broad range of platform support and integration capabilities, Livelink is a solution that can benefit many businesses. Enhancements such as document repository replication and support for mobile users will make the product even more compelling for distributed organizations.

# PRODUCT SNAPSHOT

Vendor Background		Product Background	
Contact information	Open Text Corporation 519.888.7111 www.opentext.com	Product/version evaluated	Livelink 8.1.3 with Livelink Search Upgrade
Year founded	1991	Product positioning	Global 2000, enterprise
Number of employees	~800	Product pricing	Starts at \$75,000 for 50 users
1999 revenues (if public)	\$93.5 million (NASDAQ: OTEX; TSE: OTC)	Client platform support	Web client – IE and Netscape Navigator
Products/services revenue split (%)	60/40	Server platform support	Windows NT Server, Sun SPARC/Solaris, HP-UX 10.20
Sales channel	Direct and via partners	Database support	Oracle, Microsoft SQL Server, Sybase
Key customers	Sprint, Motorola, Nortel, Shell	Architecture/object model employed	COM, CORBA
Strategic partnerships	Microsoft, Sun, Oracle, HP, and Siemens; SAP, Canon, Microsoft, Adobe, Unisys, J.D. Edwards, Nissho Iwai	Installed base (in production)	Over 3 million seats
Evaluation Category	Description	Analysis	
IT requirements review	The product’s architecture, platform and database support, appropriateness of design, standards compliance, integration capabilities, scalability and reliability features, security, etc.	Livelink supports a broad range of server, client and database platforms, and is completely accessible through the Internet	
Development requirements review	The complexity of development and the flexibility provided	Development is generally simple, and is aided by many out-of-the-box integration points with other applications	
Resource requirements review	The resources that would be required to implement and maintain the system (time, expertise, people)	With complete access through the web, wizards, and a graphical interface for set up and configuration, the system requires fewer resources than others we have seen	
Application requirements review	The key features and capabilities specific to the technology or product category (including the user experience)	Livelink provides complete document life cycle management, but the standard user interface can be confusing	
Key Strengths		Key Challenges	
<ul style="list-style-type: none"><li>• Full functionality, including administration, through a web client</li><li>• Extensive search capabilities on the web client</li><li>• Good selection of packaged connectors to applications (e.g., Lotus Notes and SAP R/3)</li><li>• Integration with LDAP and Windows NT Directory Services for security</li></ul>		<ul style="list-style-type: none"><li>• No document repository replication</li><li>• Inconsistent user interface</li><li>• No support for mobile users (planned for C’Y 2000)</li><li>• Limited WCM offering/integration</li></ul>	
Quick Take			
Livelink provides an integrated solution for full life cycle DM on the web. With its broad range of platform support and integration capabilities, Livelink is a solution that can benefit many businesses. Enhancements such as document repository replication and support for mobile users will make the product even more compelling for distributed organizations.			

## APPENDIX: ABOUT DOCULABS

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Doculabs is an independent industry analyst firm specializing in e-Business technologies. We are guided by the principle that both end-users and vendors benefit from impartial feedback about product strengths and limitations to make both strategic and tactical business decisions. Founded in Chicago in 1993, Doculabs was one of the first industry analyst firms to ground its research, end-user and vendor advisory services in unbiased, reality-based product assessment results.

We use our benchmark methodology, combined with trend and market analysis, to help our clients make the right technology investment decisions and to help vendors attack new market opportunities. Doculabs' core research methodology builds a truly credible information bridge between end-user business needs and vendor product development.

Doculabs has a growing staff of analysts dedicated to research, advisory services, and market analyses. We specialize in emerging technology solutions that drive e-business, including technologies for e-content, e-commerce, e-fulfillment and delivery, and e-business infrastructure components.

Doculabs' analysts are regular speakers at industry conferences, and continue to author numerous articles in industry journals such as *Information Week*, *Network Computing*, *PC Week*, *Windows NT*, *KM World*, *KM Magazine*, *Group Computing*, *High-Volume Printer*, and *Imaging & Document Solutions*, to name a few.

Doculabs' service offerings include advisory and consulting services, assessment services, and publications (reports and annual subscriptions). Because Doculabs does not resell products, we remain completely objective in our research and our recommendations.

For more information about Doculabs, visit our Web site – <http://www.doculabs.com>.



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