

Selectica

Smooth and efficient end-to-end contract management through integration of best-in-breed systems



Business overview

Selectica provides Global 2000 companies with solutions that automate complex contract management and sales configuration processes. Selectica's enterprise solutions streamline critical business functions including sales, procurement, and corporate governance, and enable companies to eliminate risk, increase revenue, and cut costs. Selectica customers represent leaders in manufacturing, technology, retail, healthcare, and telecommunications, including Bell Canada, Cisco, Covad Communications, Fujitsu, Hitachi, International Paper, ManTech, Levi Strauss & Co., Qwest Communications, and Rockwell Automation. Selectica is a public company (NASDAQ: SLTC) with corporate headquarters in San Jose, California.

Challenges

Managing large and complex contracts is a multi-dimensional challenge for today's organizations, and each has its own requirements for initiating and maintaining contractual relationships with other companies and individuals. Organizations need the ability to efficiently perform transactions such as buying and selling, subcontracting, and managing a large number of contracts to support cost structures, business practices, and long-term objectives—all of which vary widely from business to business. In a typical operation, the business and legal departments define a set of standard contracts with optional clauses, terms, and tracking requirements based on the unique needs of the business. When implementing specialized software for automating contract management, these companies are discovering that a one-size-fits-all approach will not meet their needs.

These are the requirements that drove Selectica's entry in the EMC Documentum xCP Designer's Challenge. The challenge was issued to EMC customers and business partners in early 2009 to build a case management application using the EMC® Documentum® xCelerated Composition Platform (xCP). xCP provides a single, integrated composition platform that enables EMC partners and customers to rapidly build case-based applications up to 50 percent faster, at a substantially lower cost, and with fewer resources (when compared to previous versions of Documentum). The Designer's Challenge was launched to showcase the ease and speed afforded by Documentum xCP for composing new applications.

EMC solution

Selectica's xCP solution jointly leverages the software expertise of Selectica via its Contract Lifecycle Management system and the enterprise document management, business process management, and compliance functionality of the EMC Documentum platform. One of the first to be developed with Documentum xCP, the Selectica Contract Kiosk enables any authorized employee to access a contract and check its status in the drafting/approval workflow. The Selectica Contract Kiosk is an integral component in Selectica's product strategy to help companies manage draft contracts, negotiate terms, gain approvals from appropriate people, and enforce the resulting commitments.

Benefits

- New efficiencies and cost savings can be achieved in developing, approving, and managing complex contracts
- All associated documents can be easily versioned, tracked, and managed throughout contract lifecycle
- Custom solution that can be easily applied and adapted to an organization's specific requirements, with tools and templates that enable rapid customer deployment

Documentum xCP is a dynamic application composition platform that provides fully integrated technologies, development and deployment tools, as well as best practices with an emphasis on configuration vs. coding. The pre-integrated technologies include content management, business process management, intelligent capture, customer communications management, collaboration, and compliance. In addition to the ability to rapidly and cost-effectively build case-based applications, xCP enables organizations to significantly reduce the total cost of ownership by creating applications that are easier to modify and maintain.

The Documentum-Selectica integration package comes as an additional component with the Selectica installer. It addresses business process management (BPM) and document services integration points across the systems for a sample set of contract types. A complete set of integration points with reusable components ensures that organizations can easily address their custom requirements for different client bases.

Leveraging best practices

In the xCP Challenge, one key criterion for finalists was their ability to leverage best practices and rely on composition and configuration vs. custom code development. In developing the integration, Selectica utilized several best practices including data source adaptors from JDBC and Documentum, best practices for creating Java methods, consolidation of different search template forms under one task space adaptor, implementation of SSO (single sign-on) with ticketed authentication, and consolidation of different form templates under one task.

In order to build the integration between the Selectica solution and Documentum, Selectica engineers created a set of APIs (application programming interfaces) that would enable a communications link between the two systems for exchange of contract documents and data. With the linkage in place, xCP templates make data mapping and implementation at the customer site a simple and straightforward matter. "Since both the Selectica solution and xCP are highly configurable, it's easy to tailor the application to the customer's specific requirements," said Selectica's Senior Director of Product and Strategy Anthony Roth. "We can use xCP templates to quickly create a user experience within Documentum that enables easy uploading of data and documents into our solution to initiate the contracting process."

"In my experience, a 45-day development cycle for an enterprise application is almost unheard of, but xCP made it possible—and that includes requirements, design, build, test, and release."

Anthony Roth, Senior Director of Product and Strategy, Selectica

An end-to-end process

In a typical scenario using the Documentum-Selectica solution, the Request stage begins when a user initiates a request for an employee or sales contract by completing a "requirements gathering" task in the Documentum TaskSpace. The information captured there is the minimum data that is required to request Selectica to initiate a contract creation. This is then sent to the Selectica solution in the "Request Contract Creation" task to trigger the start of the contract creation and workflow in the Selectica system. From within the solution, the user can edit and enter additional terms and answer questions using a user interface. At any time during the different workflow stages, when a supporting document is attached to the contract record, this document is passed to Documentum.

In the Assemble stage, additional terms are entered and the initial draft of the contract document is generated and stored in Documentum. Users follow a well-defined workflow to assemble all contract records, using forms with wizard features that prompt them through each step. The data entered in the Request and Assemble stages determines the contents of fields and clauses, including those that are conditionally added, and the system generates a contract draft from the template designed for the specific contract type.

The contract then proceeds to the Collaborate/Negotiate stage, in which the initiator shares the contract draft with other people to refine and clarify language and agree on terms. With the draft contract and other records as the medium of communication, the initiator facilitates negotiation and collaboration. The workflow prompts interested parties for feedback, comment, and corrections, keeping track of who makes proposed changes. Every document interaction in Selectica, such as check-in, update, delete, upload, or version, is automatically reflected in Documentum. The Selectica solution prompts the parties responsible to approve terms, clauses, or the negotiated contract in its entirety.

Once approved, the negotiated and final contract document enters the Assemble stage where it is generated and pushed to the Documentum server, together with all supporting documents. The initiator is given a final review, and then the ability to move the document to the “Accept” and “Finish” tasks.

In the Manage stage, the executed contract is electronically stored in protected form and administered to manage compliance, obligations, payments, and all milestones.

Record development times with minimal custom code

In keeping with the spirit of the xCP Designer’s Challenge, the Documentum-Selectica solution was completed in only 45 days—a remarkable achievement considering the complexity of today’s business contract management processes. Custom code was kept to a minimum, and encompasses five key areas:

- 1) Java method server code that provides the integration point in which the request to generate a contract in the Selectica solution is made.
- 2) Java method server code that creates the integration point in the Documentum business process in which the Selectica solution folder containing all contract documents is associated with the Documentum process instance.
- 3) Standalone code to facilitate an instance in which a Documentum user requests that documents be uploaded to the Selectica solution to support a given contract. The code enables uploading of attachments to the system using Web services.
- 4) A generic LOV adaptor that makes a request to the Selectica application for a list of values (for example, a list of counter parties) to populate them in Documentum form.
- 5) A generic form processor adaptor that facilitates the submission of data from EMC to Selectica Contract Lifecycle Management in a generic fashion. It refers to a mapping file for the mapping between the Selectica and EMC elements.

Summary

With its integration of the Documentum content management platform and the Selectica Contract Lifecycle Management system, Selectica secured its position as a finalist in the xCP Designer’s Challenge. The resulting application leverages the best in breed of document/content management as well as contract management technologies to address the daunting challenges organizations face in initiating, approving, and maintaining contracts for any type of product or service.

“In my experience, a 45-day development cycle for an enterprise application is almost unheard of, but xCP made it possible—and that includes requirements, design, build, test, and release,” said Roth. “Also, giving our development teams a tool that can get a customer implementation up and running so quickly is a large benefit to us as well as our customers.”



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