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Welcome to Hyland Software's ECM Solution Guide

You have questions about enterprise content management (ECM). "What is it?" "What can it do for me?" "Can it really help me save time and money? Everyone says their solution will save them time and money." "And everyone says they do the same thing."

We know, we know. It's confusing. Maybe even daunting. And you need to make a smart decision – *the first time.*

Good news. Everyone at Hyland Software – and we mean everyone – wants you to make a smart decision. That's why we built our ECM Solution Guide with you in mind.

Easy to read, simple to navigate, our Guide walks you through the basics, from the different types of ECM through the benefits of implementing a carefully considered, strategic solution.

It's designed to fortify your research and strengthen your understanding of what a smart ECM solution can provide. We nail the basics, give you a lot to think about and help you move to the next level: building your ECM solution.

Understanding the Three Types of ECM

Get this. Not long ago, the Pennsylvania Treasury Department was spending $9 per check to process 300,000 monthly Social Security supplemental checks, each paying out a mere $27.40. Do the math and you'll discover this particular program was costing the state $2.7 million a month or $8.1 million a quarter.

Ouch.

Something had to be done, and the Treasury Department knew it. So it started searching for a business solution.

Chances are that's why you're visiting Hyland today. You know you have a problem – either specific to your department or enterprise-wide – and you know you need a solution. But you just don't know what it is, or how to implement it, or what this crazy product OnBase is and what it can do for you.

That's okay, you're not alone. The Treasury Department didn't know either, at first.

But they figured it out. And guess what? By implementing Hyland's document management and workflow business solutions, the department dropped its processing cost from $9 to $1.50, realizing an 83 percent savings of $8 million a quarter, and a return on investment in less than one business day.

Nice, huh? Yeah, we think so, too.

But enough about the Pennsylvania Treasury Department. Let's talk about you and your business problem.

Are you losing critical documents, have little to no visibility into your everyday business processes, or can't easily find information when you need it? Then a content management solution can help. But which one?

Cutting Through the ECM Clutter

First things first. As we said in our introduction, enterprise content management (ECM) is a relatively generic term. It means a lot of different things to a lot of different people. Throughout your ECM journey, you will encounter several ECM vendors – all using the same terms and claiming to do the same thing.

The truth is, no one can do it all. Most do well in one – maybe two – ECM classes. So it's extremely important to know what style of content management will best solve your problem before you send out requests for proposals.

You will also hear a lot of companies talk about ECM as a solution. So quick lesson: If your problem is not enterprise-wide, that's OK. Great ECM software companies will offer you a scalable solution; one that solves your immediate need and can be applied to other issues – and other departments – when you choose to address them.

Get Started By Understanding the Three Types of ECM

We can break down ECM into three types: web content management, collaborative content management and transactional content management. Figuring out where your company's ECM needs fit is possibly the biggest step to finding both the right solution and the right vendor.

And remember that most ECM vendors are only good in one (or two) of these types. Just wanted you to know where we excel. For Hyland Software and its software solution, OnBase, it's transactional content management. Keep that in mind as you read on.

What is Web Content Management?

If you woke up this morning sweating about whether your customers can easily find valuable content on your company's website, or have doubts about your employees' ability to simply and efficiently manage that content, then start shopping for a web content management system.

Different than collaborative content management or transactional content management, web content management (web CMS) is a software business solution that allows consistent control of website look and feel – brand, wire frames, navigation – while giving several content producers the ability to dynamically create and publish content – articles, photo galleries, video and so forth.

So if your company maintains a large, content-rich website or suite of sites focused on brand consistency and personalized content for each public-facing presence, the solution you're searching for a is a web content management system.

A good web CMS should be intuitive for your users. It should give content writers the ease of creating and updating content on their own, freeing up web developers and SEO managers to design and tweak the system. It should be a collaborative system, allowing authenticated users the ability to edit, design, post and publish quickly and easily.

Some things to consider:

- User experience: Make sure the system you choose offers simple, built-in text editors and the ability to add pre-defined functionality to the page. Make sure any training necessary isn't too complex for non-technical employees.

- Scalability: As your business grows, so should your web CMS. As business booms, you'll discover the need to add more content, more functionality and the desire to branch off with niche sites.

- Content Tools: Make sure you can control what, when and how content is published. Chances are, as your business grows, more editors, writers and content creators will have access to the CMS. You want to make sure the tools to control content workflow are in place.

- Support and Updates: Understand the level of technical support you will receive from the makers of your web CMS system (some? none?) and be comfortable with your choice. Also, make sure you are notified when updates to the software occur – and that you have easy access to those updates.

And that's just scratching the surface.

What is Collaborative Content Management?

Maybe you work in a pharmaceutical company or financial services organization that demands several people work on the same document in various iterations and those folks are miles – or even oceans – apart. This solution allows for an entire team to work off the same master document, tracking changes, saving minor drafts and embedding files. Sound like you? Then you're looking for a collaborative content management system (collaborative CMS).

If it were dictionary defined, the entry for collaborative content management might read something like: A system designed to process and assist the simultaneous creation of content by multiple authors across a network-based infrastructure. A mouthful, we know.

But here's a simple way to picture it. Imagine a table with a blank piece of paper in the center. Now picture a group of people around the table, each with his or her own pencil and eraser. One after the other, each person gets time with the document – to write something new, correct a remark, add an image, review, approve and sign off on the document. In the end, there aren't multiple documents on the table. Just one. The one everyone works from.

Collaborative content management – sometimes called collaborative document management – is the same thing, only living in a digital world where a software or online portal serves as the table and the group around the table is, in reality, sitting anywhere in the world, working on the document at any time of day.

One of the best examples of just such a collaboration system is Wikipedia, the mammoth online encyclopedia written and edited by users from around the globe. Wikis, used more and more often by businesses to collect intellectual knowledge and drive projects and ideas from across the company, are natural collaborative CMSs. They allow various editors to create, tweak and edit the same content from anywhere.

If your business relies on key business knowledge and research that you continually duplicate (i.e., reinvent the wheel), and more and more often your employees telecommute (i.e., live miles, states or countries away), collaborative content management is a business solution to consider.

Collaborative CMS will allow you to create "shared workspaces" – the electronic version of the table top we talked about earlier. More advanced systems can even allow for online meetings, white-boarding, collection and storage of project documents and version control and tracking.

What is Transactional Content Management?

Do you know when you need transactional content management (TCM)? When you decide to make a musical about your paper woes, just like Avi Amon did. Amon is admissions counselor at the University of Delaware. In a video Amon created for YouTube, we see Amon seated at his desk, surrounded by papers and folders, telling a friend that he can't leave because he's tied to his work.

"So many files," he sings. "Piles and piles and piles."

Sound familiar? If you have a lot of physical documents – insurance claims, medical records, government forms, payroll, student admissions – and you need a more efficient way to maintain, access and route those documents, then you're looking for a transactional content management solution. And with a solution like Hyland Software's OnBase, it becomes even more powerful, as workflow solutions automate repeatable business processes and seamless intergration with established core applications means ramping up users almost immediately.

Like everything dealing with enterprise content management, TCM is sometimes known by different names – document management, document imaging and others – that are more parts of the TCM picture than the picture as a whole.

For simplicity's sake, we'll stick with Gartner's definition: A system of record for managing process-related documents.

"It's important to note that TCM is not just paper scanning as some would suggest," writes Ken Burns, resident ECM expert at Hyland, in his blog post Transactional Content Management: The Rising Star in Gartner's Magic Quadrant for ECM, 2010. "Solutions in this segment of the market serve as systems of record for content files, specifically when used in the context of transaction and case-driven business processes. Far from being static repositories for scanned images, leading software suites in this space provide sophisticated process automation and case-based applications."

And just like that, we're talking about OnBase, Hyland Software's industry leading TCM solution. OnBase, and TCM systems like it, are designed to fill in gaps between related processes, applications and departments.

A TCM system lets you:

- Capture documents in any format – including paper, e-mail, mainframe reports and e-forms
- Manage content according to your organization's business rules and gauge the health of processes in real-time
- Store, organize and track your content so documents are there when you need them
- Deliver documents as soon as they're needed so processes run fast and costs stay low
- Preserve and protect your documents so you meet and stay in compliance with internal and external standards

"TCM is the most mature segment of ECM," Burns tells us. "And, it's the one that demands the deepest functionality and domain expertise for horizontal (e.g. accounts payable invoice automation) and industry-specific processes (e.g. patient chart deficiency management, insurance claims processing, agenda and minutes management)."

If you're ready to discover measurable benefits to your business processes, eliminate paper and file folders, and if you're ready to give your employees the ability to tackle high-value tasks and forgo low-value tasks (like fetching paper and file folders), and save money, then you're ready for ECM.

Why Do I Need ECM?

Now that you know the difference between the three types of enterprise content management, and you know that Hyland Software's OnBase solution is at its core transactional, let's talk a bit about why you might need a transactional content management (TCM) solution.

Side note: One of the first steps in creating an ECM project strategy is identifying the business problem you are trying to alleviate. The best way to do so is to think big and then drill down to specifics. You know, inspect the clock hands before you replace the pinions and pendulum.

With that in mind, let's start by focusing on five of the most common problems we hear from customers:

- I Have Too Much Paper!
- I'm Losing Track of Documents!
- Compliance is Keeping Me Up At Night!
- My Employees are Engaged in Low-Value Tasks!
- I Have Too Many Versions of Critical Documents!

We're guessing one – if not all – of these will sound familiar. Take time to read them all, just to get a sense of how ECM can help you resolve these wearisome time stealers, productivity killers and ulcer promoters. But if you see your specific issue, by all means, jump ahead and learn how TCM can help.

Do You Have Too Much Paper?

When we're talking business, how much paper is too much paper? Sometimes, the answer is subjective. For some, a stack of files in their inbox is too much. For others, it's an office full of filing cabinets that could be put to better use.

What about more than 16 miles of paper files, scattered across multiple departments? And a business process that interferes with patient care? That was the problem for one Hyland healthcare customer. Hopefully your struggle with paper documents isn't as great.

But we wouldn't be surprised if it is.

Paper, by way of applications, resumes, receipts, work orders, invoices, bills, and more, consumes time across an organization because of the way the company interacts with it. Human resources, accounts payable and receivable, facilities management -- even the holy grail of all business, customer service – are all affected by the way paper is handled. Slow processing, difficulty retrieving files, incomplete information, duplicate work – all are productivity killers and customer service nightmares for a business just trying to stay competitive.

Plus, it takes up space. One Hyland customer, TCP Inc., a manufacturer of energy efficient lightning, previously stored files in a warehouse primarily used to house its product. Since the files were kept stacked, an employee who needed access to those files would engage a warehouse employee authorized to operate and retrieve the documents via forklift. The process consumed the employee's time with a low-value task and interrupted the warehouse employee's regular work flow.

After implementing a document management solution to combat its paper consumption, TCP eliminated wasteful, unproductive steps from its operational and administrative processes. It created a paperless order entry process, eliminated the need to print 125,000 pieces of paper annually, reduced days sales outstanding by five and saved the equivalent of four full-time employees in labor hours.

Let's be clear. No transactional enterprise content management solution is going to completely eliminate paper from your business life. There will always be paper, and paper will always be there. But you don't have to be overwhelmed by the sheer quantity of information your business encounters.

A smart, easy-to-use document management solution can seamlessly collect, organize, and index the multitude of documents and content into a single 360-degree view for smart decision making.

Are You Losing Track of Documents?

Overwhelmed with paper is one thing. Overwhelmed by information is another. After all, paper is something most organizations want to eliminate.

Information, on the other hand, is the lifeblood of a competitive company. The more the better. But not if it's disorganized, misfiled or critical documents are disappearing.

When we say critical documents, we mean just about anything important to an organization. If you're in financial services, mortgage and loan documents are critical. For those in the insurance industry, anything connected to a claim and claims processing is pivotal, both to the bottom line and to customer service. Healthcare? Everything involving the patient. And it doesn't matter how big or small you are, employee records and policy documents are vital for your human resources department.

So imagine the turmoil if any link in the information chain goes missing. And we're not talking about paper files alone. Electronic files, like emails, spreadsheets, and Word documents, that are decentralized, poorly organized or difficult to retrieve can lead to just as much lost time, lost productivity and duplicate work.

The Colorado Housing and Finance Authority (CHFA) knows all about this. Though it was struggling with mountains of paper (projects files could reach 300 pages or more), it benefitted from clear records management once it implemented an enterprise content management solution. It reduced the time to retrieve project files from 12 minutes to 10 seconds or less, making its staff three times more productive. Audit time was reduced from days to hours. And the CHFA no longer worries about losing documents.

How so? Because a transactional ECM solution allows for complete document life cycle management, from input through destruction. Documents are centralized, searchable and, with the right solution, automatically linked to the appropriate account, customer, patient, employee and so on and so forth.

Not only that, but documents outside the electronic world, like physical patient charts and samples and original loan documents, are easily managed as well.

In short, your ECM solution must bring clarity to all of your data, electronic and otherwise, and allow for easy tracking of critical documents.

Problem Solved: Records Management, Page 20

> *"We chose OnBase because of its tight connection to SAP and how easy it would be to use and manage."*
>
> – Wendy Cambarare, Accounts Payable Manager
>   Moen

Employees Engaged in Low-Value Tasks?

There's a story we tell around the office about a client that, prior to implementing an enterprise content management system, had a unique way of shuttling files between offices: a full-time employee on a golf cart.

It's true. Departments within this particular government client were located in a number of buildings. If a file – tax file, legal file, human resources file – needed to move from one department to another, the employee would hop in a golf cart and drive the file to its destination. That was his job.

It is also the definition of a low-value task.

Most organizations have some version of the low-value task. Often those tasks involve moving paper from one person to the next. Like Whatcom Educational Credit Union, a fast growing financial services company in Whatcom County, Wash. As its membership grew, so did its paper piles – loan applications, membership profiles, you name it.

All that paper was physically stored in its main office. So whenever a team member at a branch needed to access a member's file – while the member was standing at the teller window, no less – someone at the main office would have to find the file, find the right document within the file, and fax the paperwork to the branch.

Stop and think about that for a minute. Think of the time wasted on the low-value tasks of calling the main office, finding someone to retrieve the file, time spent retrieving and faxing the file, and reviewing the fax once it came across.

Now consider the customer at the teller window and how those low-value tasks impact service times and member satisfaction.

Leaders at the credit union knew abolishing these low-value tasks would eliminate its paper woes. But more importantly, it would drastically improve customer service. And with an enterprise content management solution that integrated effortlessly with its core system, it managed to do just that.

Now employees have instant access to member files and information. Time previously swallowed up by calling, faxing and waiting (the low-value task) is spent helping customers reach their financial goals (the high-value task).

Whatcom uses a workflow management tool to accomplish this. The tool automatically processes work and is easily configured to meet rapidly changing business conditions – and it does so safely and securely. Only the right people at the right time can access it. It improves customer with faster turnaround times, reduces costs by freeing staff from manual tasks, and helps enforce consistent business practices that ensure accountability and compliance.

Problem Solved: Software Integrations, Page 22

Do You Have Too Many Versions of Critical Documents?

If you're in the business of selling a product or service and field a workforce of sales agents who represent that product or service, how would your business succeed if each sales rep was working from a different price list? Or if some where using outdated contracts or order forms?

It wouldn't, would it? Or it would take a lot of work to stay ahead of the game. Toss in other legal and compliance issues, and having too many versions of "final" documents because a headache nobody wants.

With an enterprise content management solution that allows for document management and version/revision control, that worry can be a thing of the past. With thoughtful implementation, businesses big and small can centralize the management of changing business documents, and provide offline synchronization for remote users, ensuring that everyone accesses the most up-to-date version of the document.

Take, for example, Allina Medical Laboratories in Minneapolis, Minn. Without a standard for pushing out policies, lab staff often missed a new policy announcement or update to an older policy. With Hyland Software's OnBase solution, policies are stored and monitored in a central repository. And Allina can now track which medical director signed a policy and when, while new employees are sure to receive the most recent versions of every policy they need to see.

Furthermore, if a policy needs revisions, Allina can route a draft for review by the appropriate decision maker. When the policy is final, the system sends it to a medical director for approval. After 11 months, the solution reminds the policy owner that it is up for yearly review. That way, the staff doesn't need to worry about remembering when each policy is up for review, nor do they have to wait for slow paper approvals. Policies are always updated on time and Allina stays in compliance.

This is crucial, as Allina must be ready for an audit by the College of American Pathologists or the American Association of Blood Banks.

The best part about being able to manage the creation, revision and distribution of critical business documents is just that – the ability to manage the creation, revision and distribution of critical business documents. No more snafus with clients or customers working from old versions. No worries that important notations are disappearing with the paper they were written on. And an unprecedented ability to ensure document consistency and keyword accuracy.

Compliance Keeping You Up at Night?

With increasing levels of compliance regulations and required audits, both internal and external, keeping track of necessary documents is more important than ever.

One of the best examples is the recent overhaul of the U.S. food-safety system, which calls for an increase in government inspections at food processing facilities and gives the Food and Drug Administration (FDA) the ability to order mandatory recalls of unsafe food. Part of the recall process requires manufacturers to provide remote access to critical records and documentation to the FDA for investigation and audit purposes.

That's a nightmare come true for food producers with scattered and disorganized document management. One that could mean disaster to the business – from lost revenue to facility closure. After all, a typical FDA recall can cost millions of dollars.

A well thought out enterprise content management system can ease minds and facilitate audits and other compliance requirements. In fact, most manufacturing organizations realize their biggest cost savings from existing auditing costs, including remote, secure access to critical documentation, after implementing a smart ECM solution.

Furthermore, the right records management solution will manage length of retention and final disposition of documents. In other words, give your document an expiration date and it will automatically delete when the date arrives (or send you an email to let you know it's time to purge the document and allow you to review and approve the deletion).

Work in financial services? Think of how much sleep you'll get knowing how your carefully considered, strategically implemented ECM solution is keeping an eye on your Sarbanes-Oxley (SOX) compliance requirements and helping you manage your compliance costs, nearly $2 million annually for companies with average revenues of $4.7 billion, according to a Financial Executives International survey.

 Other benefits:

- Increases response to changing compliance regulations and instantly distributes updates
- Stores and communicates changes without copying and handing out changes
- Provides high-level safety and compliance dashboard to your compliance officer to reduce risk in real-time
- Manages the retention of stored documents according to pre-defined rules to support compliance and minimize legal risks

ECM Building Blocks

Now that you've learned a bit about the three types of enterprise content management (ECM), know you're searching for a transactional ECM solution, and identified the business problem you want to relieve, we can start discussing how best to get started with your ECM solution.

To get you started, we sat down with a few of Hyland Software's product evangelists and subject matter experts and asked these ECM gurus to share their thoughts about five of the top foundational ECM building blocks. We wanted to know what those solutions are, why they're foundational and how they best benefit a company.

A few things became clear as we chatted with these megaminds:

1. The most important concept to take away from this section of the ECM Business Solution Guide is that an enterprise content management solution doesn't start its life enterprise-wide. In fact, it's better if a company starts small and allows its ECM solution to grow with the needs of the organization.

2. Let the problem you're trying to solve dictate the solution you choose. Don't get mired in technological bells and whistles. Think about the needs of the company and then find a solution that adapts to the organization. Not the other way around.

3. One size does not fit all (see our note above about an ECM solution not starting enterprise-wide). But a good foundation will let your solution flourish across departments. Start departmental, show the ROI, and expand.

Here are six ways to start building your foundation:

- Business Process Management
- Document Imaging
- Document Management
- Records Management
- Software Integrations
- Workflow

Business Process Management

IIt's a popular business cliché: "Work smarter, not harder." And if anyone ever asks you to tell them what that means, say, "Well, essentially, it's business process management."

Business process management (BPM) is the practice of using computer software to assist a business with conducting its work. It allows employees to work smarter by letting the BPM system handle logistics and rudimentary processing, freeing users to focus on more high-value tasks and exception cases. The BPM system ensures that work is handled consistently, and that items arrive where they need to be, when they need to be there. Employees no longer spend time figuring out what tasks they have to do. Instead, they can focus on completing the tasks given to them.

To learn a little bit more about BPM, we sat and chatted with Hyland Software's BPM guru, Dan Wilson.

"If you are currently not using BPM in your organization, then you are likely not operating as efficiently as you could," says Wilson. "BPM helps remove busy work from your employees' task lists, ensuring that their effort is focused where it is most needed and valuable."

Let's get started
Getting started involves identifying the various processes your organization follows and then creating a computer model of those processes. This model includes the rules and actions that take place at various steps, allowing the BPM system to control the flow of data through the organization and, in many cases, fully automate the process, completely eliminating the need for human involvement.

"Many organizations start their BPM journey in one of two places, human resources or accounts payable," says Wilson. "Both tend to have highly-structured processes that lend themselves well to automation. For example, invoice approval in AP tends to follow one of a few well-defined processes depending on the source or value of the invoice. This makes it a prime candidate for an organization's first foray into BPM."

BPM projects are generally more successful if they start with a limited scope, putting to rest any worries about having to launch BPM enterprise-wide.

"Attempting to address the entire enterprise from the outset can be a bit like trying to boil the ocean," says Wilson.

Start small and branch out. You can establish some quick wins, and take the time you need to become familiar with the tool and the practice of automating business processes.

"Growing pains are best experienced when you're small," says Wilson. "And the best part about Hyland Software's OnBase configuration? Most BPM solutions can be implemented without writing a single line of code. This means you don't need a suite of programmers on staff in order to make use of OnBase BPM. In fact, with many of our customers, the business users actually handle configuration of the processes they use."

Benefits galore

Implementing BPM benefits a company in numerous ways, from ensuring business rules are applied consistently to items moving through the system to allowing an organization to track where items are in-process at any time. And if something gums up the works, notification goes out to the appropriate individuals so lack of movement doesn't impede important opportunities.

Employees and other end users benefit the most, if only because they don't need to remember all the rules that apply to a particular process.

"The system takes care of it," says Wilson. "Employees no longer perform tasks that a computer can handle, providing employees with a more consistent process to follow, allowing them to become more efficient over time."

If you've already experienced the wonder of BPM, and your company scans a lot of documents into the system, Wilson suggests researching Hyland Software's OnBase solution for automated indexing or intelligent automated indexing, since they can dramatically reduce the amount of effort a company's scanning department must perform in order to import documents into the system.

Document Imaging

Here's a good way to think about document imaging. Picture all those boxes of historical archives shoved into your company's warehouse (or storage closet in marketing or empty office down the hall). The one filled with hundreds of documents, papers, snapshots, financial reports – some tattered, others faded, a lot of it duplicate, many pieces unidentifiable.

Imagine a request from your CEO to find a specific item among that wreckage: the script for a speech delivered by the previous CEO, we'll call him Alan Hinkle, at a charitable event in Apple Valley during the summer of 1977. She needs that document – and she needs it now.

Yikes! You're in for an afternoon of hunting, fishing and hoping the document exists.

Now imagine if all of those archives were stored electronically, tagged with keywords (speech, Alan, Apple Valley, 1977), easily searchable and quickly shareable. You could find and forward that script to your CEO in seconds.

Yes! Now you're a hero.

That's the power of document imaging.

More power to you

"Document imaging encompasses all of the processes by which paper documents are converted into electronic format, for both business processing purposes, as well as long term storage," says Steve Reed, development manager, capture and imaging applications, for Hyland Software. "Converting documents into electronic format allows for multiple persons within an organization to view and make decisions concurrently, makes these documents retrievable from anywhere, anytime, and drastically reduces the amount of physical storage space required to maintain these documents."

Getting started with a document imaging solution is easy, but there are a few questions an organization should answer before it selects a solution. Reed suggests the following:

- Will you use centralized capture or distributed? Centralized capture is … Distributed capture is …
- Where are the documents created?
- If there is a desire to do centralized capture, how will the documents get to my facility?
- Where are the employees located who know how to classify these documents?
- What kind of document volume must be processed?
- How fast do I need to get documents scanned in order to meet my internal service level requirements?
- Can my remote offices do all of the work, some of the work, or none of the work?
- How many scanners do I need to meet my desired service levels?
- How many indexers do I need to classify these documents?
- Can I do some of the work with automated indexing?

It's a daunting list, but one that is easily conquered. And a good software solution provider like Hyland will take the time to help you answer the questions and customize a solution that fits your business needs and corporate goals. To make it even easier, great software solutions like Hyland's OnBase support all industry-standard scanning hardware and related software add-ons. OnBase also provides modules that allow for either centralized capture, distributed capture, or any combination of both.

You're the hero, again!
A solid document imaging solution provides benefits to employees at every level, whether it's the facilities manager who no longer has to find storage space for filing cabinets, the clerks who no longer have to search for documents by hand, the department managers who can instantly see items that require approval, or the CFO who can perform an audit on every document processed last month without leaving his or her office.

It also allows an organization to start small and grow the solution organically, as it best fits the company and its employees.

"Implementing a solution one department at a time is often a good way to ease an organization into document imaging," explains Reed. "This allows for identification of internal bottlenecks, which are corrected in the capture and classification process, as well as a means to formulate best practices based on unique business processes."

As for which department to start with, that depends entirely on the type of business. Many organizations choose to start with accounts payable/accounts receivable, human resources, or the mailroom.

Now what?

Often, organizations implement a document imaging system and quickly realize they want more from the solution. They want to rev it up, so to speak, and see what else it can do.

To do so, Reed suggests considering the following solutions:

- Workflow. Take those electronic documents and apply business processing rules, from the very simple to the very complex.
- Automated Indexing. Classify the documents with far less human interaction than manual indexing requires.
- Document Retention. Implement and automatically enforce retention policies based on internal requirements, legal/compliance requirements, or both.

Document Management

It's probably the question that first led you to Hyland Software: What is document management and do I really need it?

Well, considering that 60 percent of an employee's day is spent working, in one form or another, with records and documents, according to a report by consultant firm the Delphi Group, you can see how efficiently managing that information – physical and electronic – can determine the success or failure of any organization.

"For an organization to be in a healthy state, that information must continue to flow to the right people at the right time," says Glenn Gibson, product marketing manager. "If it doesn't, then bad things can happen."

One of those bad things? Missing or lost documents. It's a problem that already plagues many businesses.

According to Accenture, a management consulting, technology services and outsourcing company, 59 percent of 1,000 middle managers surveyed say they miss important information almost every day because it exists within the company but they cannot find it. And executives spend a statistical average of six weeks per year searching for lost documents, according to a survey of 2,600 executives by worldwide office supply leader, Esselte.

"Documents in your organization can be literally all over the place," says Gibson. Paper floating free in a filing cabinet, on someone's desk or in an internal mail envelope. Electronic documents stored in one of many central servers, or on someone's personal computer or in an email inbox. Just to name a few possibilities.

"The amount of time your business users take looking for documents is measurable," Gibson says. "When you calculate the wasted time employees spend searcing for documents and then multiply that by their salary, you will likely discover that your current processes are already costing you an incredible amount of money."

Document management to the rescue

By implementing a smart document management solution, you are consolidating all of your organization's core document-centric information into one place, stored electronically, which then makes it much easier for business users to find the documents they need, allowing your business to thrive.

Getting started is easy, according to Gibson. The solution doesn't have to be enterprise-wide. In fact, it's best to start with the department – HR, accounts payable – that needs the most help.

"This often yields much quicker results," adds Gibson. "Once other business areas see results from that department, company-wide adoption won't be far behind."

In the end, everyone benefits in different ways.

"It's kind of like asking the question, who in your family will benefit most from moving into a beautiful new house," says Gibson. "When a document management system is in place, you'll discover that your end users feel much more productive because they can forgo spending time on the mundane and frustrating task of searching for documents and information. They can just get their jobs done. On the other end of the spectrum, your stockholders will love it because your business will be more productive and more profitable."

Once comfortable with its document management solution, and after realizing the rewards a successful implementation creates, most companies start exploring a workflow solution.

"Workflow can take your solution to the next level by delivering documents right into the hands of the appropriate people in your business – nearly eliminating searching for documents at all," says Gibson.

Records Management

Records management. You can't get away from it, no matter how hard you try. So how does an organization adopt a records management solution that fits the business, grows with the business and helps the business succeed?

Colleen Alber, product evangelist at Hyland Software, advises companies to start with what they know.

"Records management allows a company to meet legal retention requirements with regard to its corporate documents and records, thereby avoiding fines, jail time, unsuccessful audits and all sorts of other problems, from simple record organization to legal discovery," she says. "It doesn't matter what industry you're in. If you've got an HR department, then you've got records requirements."

For companies testing the waters before deploying a records management solution across the enterprise, Alber suggests choosing a department where retention requirements are already established. Smart records management solutions are easily configurable and provide customers with the ability to meet compliance or records retention requirements at a fraction of the time, cost and risk of manual methods.

If retention requirements are not established, Alber suggests working with a single department to define content types and associated retention schedules.

"I think sometimes records managers think that they have to have everything 'sorted out' across the entire organization before they can begin using a software tool. This just isn't true," says Alber. "Pick a department or business unit and grow from there. Once the content is managed, the rest is history," Alber says.

How records management works
Hyland Software's OnBase records management solution uses pre-defined rules to "fully automate" the process, from record declaration through final disposition. In other words, documents are automatically declared as records, events and holds are automatically placed on records, and records are automatically destroyed or purged from the system – all as a result of normal user or system activity.

"The beauty of OnBase is that one system is used for both document management and records management – meaning that a single copy of the document is both the transactional content and the business record," explains Alber. "So, when something in the business affects the status of the record – the 'change' happens automatically behind the scenes."

For example, when an insurance claim is closed, the records management solution locks users from editing the files. The loan officer can still view the documents, but he cannot make modifications.

As a bonus, it doesn't matter how the user interacts with the document – from OnBase, to Microsoft Office to E-mail – users can continue to work in the interface that works best for them. (For users that live in Microsoft Outlook, we keep them there - providing OnBase content and features in the user's preferred interface!)

Everyone benefits

"Since so much of the records management function is invisible," says Alber, "business users can focus on their primary job, not retention requirements. For example, an HR generalist doesn't have to remember how long to keep a W-4 Form after an employee has been separated. He can focus on finding and retaining talent."

The records manager wins because she can focus on the overall process, not the pieces. She's not managing individual records or nagging employees, but instead working to consistently provide visibility and improve records retention enterprise wide.

"Administrators receive elevated privileges and reports that detail record activity and status," says Alber. "For example, the records manager can easily verify record completeness, facilitate approval, report on record status and prove destruction on a single item or across the entire repository. Think of it like a departmental manager who no longer has to micro-manage his employees, but can instead focus on strategic departmental initiatives."

And folks in the C-suite benefit because the organization remains compliant. Records are securely organized, appropriately discoverable and then destroyed accordingly, allowing executives to avoid all kinds of organizational headaches.

"There's just something about knowing that records are properly managed that helps everyone sleep better at night," says Alber.

Software Integration

Whether you're in healthcare or higher education, regardless of organization, when searching for an enterprise content management (ECM) solution, you will want to have confidence that it integrates well with your "in-house" software technology. Financial services companies, for example, want to know that a new ECM solution – well, any solution, really – will play nicely with its core banking solution.

The reason why? No one wants to overhaul technology that's already in place and working well, or challenge (i.e., frustrate) employees by changing the software applications and solutions they're already comfortable working in.

Instead, you want a software solution that fits snugly within your current system, whether it's an electronic medical record or core banking solution, so much so that your employees don't even realize they're accessing the ECM solution.

"There's a clichéd word we use to explain this: seamless," says Glenn Gibson, product marketing manager at Hyland Software. "When we integrate OnBase (Hyland Software's ECM product) with other applications, it is very hard to tell where OnBase starts and the business application ends. We can extend its functionality right into the other application's user interface. The user doesn't need to leave the application. All they know is, the application they always used, just got much, much better."

Sotware solutions that seamlessly (there's that word again) integrate with established technology also allow for training ease.

No hassle training
"Training is very simple," says Gibson. "By keeping your users in the applications they are most familiar with, training requirements are minimal."

Employees aren't using work time to learn a new application or software process. Instead, they're introduced to new functionality – a button or menu – presented in the style and format of their current application. For healthcare professionals, this might mean added functionality in their Epic EMR. Or for the vast majority of office workers, this could be a new button on the Windows ribbon of Outlook.

Outlook is much more than an email messaging tool. It keeps business processes moving by instantly sharing mission-critical documents and other pertinent information. By integrating with a solution like OnBase, users no longer store documents in their e-mail software. Instead, they save them right into OnBase without leaving Outlook. And email archiving is simple; just drag an email into an Outlook folder or auto-archive by subject line or keyword. Furthermore, any document in OnBase is available instantly, right from Outlook, regardless of how it was imported.

"Thousands of people use OnBase every day and may not even realize it," says Gibson. "Their company benefits because those doing the tasks are instantly more productive. Time wasted looking for supporting documents, whether paper or electronic, is now completely eliminated, allowing business users to spend more of their time doing the important stuff."

Integrates with any application

Gibson can't emphasize enough the value of having an ECM solution that plays nicely with other technology.

"OnBase can integrate with any application," he says. "Unlike many ECM software solutions out in the market today, the OnBase integration can happen without any custom code. Almost anyone can learn how to integrate OnBase with core business applications, with little – if any – formal programming experience."

Gibson goes on to say that Hyland's implementation experience has taught it that OnBase is a key component in an organization's overall content management strategy – but is rarely, if ever, the only component. And that's fine, because that's the way it should be.

"It's less a question of 'will we integrate OnBase,' and more a question of "how many applications will we integrate with OnBase". We understand this and work closely with our customers to make it happen."

Workflow

One of our favorite stories about the power of Hyland Software's OnBase workflow solution comes from Johns Hopkins University. In 2010, a powerful blizzard shut down much of the Northeast, stranding most of Johns Hopkins University's admissions staff at home during its busiest admissions season in the school's history with a "decision" deadline fast approaching.

Potentially bad news because, in the world of higher education, the sooner you can accept college applicants in the admissions cycle, the better chance the student will select your university to attend. It's also important because universities want to identify and offer admission to the best-fit students (those that will excel and graduate) faster than the competition.

Before the storm, however, Johns Hopkins implemented a document management solution that included workflow. So instead of hauling files to and from work, hand delivering "decisioned" paper files to the operations staff, and having that information manually inputted into a computer, the university's admissions staff electronically decisioned files and had those files posted directly to the enterprise database.

The solution made life easier for everyone. Oh, and the staff recorded the most productive reading week ever.

Not surprising to Paul Lloyd, senior developer at Hyland Software. It's the perfect example of workflow allowing "high value workers to concentrate on high-value tasks. For the business this means a greater throughput, which means happier customers."

Go with the workflow
"Workflow automates business processes allowing work to be shared efficiently between workers," explains Lloyd. "It matches work tasks with the workers that can best do them."

In an higher education admissions setting, this would mean that, after a college application was electronically inputted into the solution, it would be electronically routed to the appropriate staff person. That might be based on workload, specialization or any other factor the university decided.

Supporting material – transcripts, essays and so forth –in electronic form would follow along and be easily retrievable, freeing the staffer from the low-value task of hunting for the loose paper documentation.

"Once they're done with their work, the work task is automatically routed to the next worker," says Lloyd.

The end benefit, regardless of the industry, is higher efficiency and speed to resolution.

"Employees at every level work more efficiently because they spend more time on tasks best suited to their individual skill. They do what they were hired to do," says Lloyd. "Employees won't waste work time searching for documents or supporting material. It helps put an end to the low-value task."

How do I know if I need workflow?

Do any of these problems eat at your efficiency? If so, they you need a workflow solution:

- Employees are spending too much time doing low-value tasks (searching for documents, waiting for or manually transferring paper files, losing critical documents, duplicating work)

- Some employees are swamped with work, while others are idle

- Busy decision makers are causing bottlenecks in the process because they must be involved but are regularly unavailable

- Employees are cherry-picking work (most interesting, most valuable to them, and so forth) to the detriment of corporate goals

Not all pain points are solved with workflow, however. So when you consider the problems above, make sure you measure them against business processes that can be broken down into a sequence of well-defined steps; multiple steps completed by different people or groups.

And don't overwhelm the organization with an enterprise-wide solution right off the bat, suggests Lloyd. Great enterprise content management solutions rarely – if ever – start enterprise-wide.

"A departmental solution is a good place to start," says Lloyd. "Consider starting small, using workflow to automate a well-defined process such as accounts payable or human resources. Solutions there can raise productivity almost immediately."

OnBase workflows are easy to configure: no programming knowledge is required. "Even the most complex solutions require very little programming; it's mostly point-and-click configurable. But it's extremely powerful," says Lloyd.

And you don't need a huge investment in training or in support staff, adds Lloyd. Many workflow solutions are administered by the business users themselves. "It's a quick return on investment."

"As other departments discover the benefits of workflow, they'll soon sign up," says Lloyd.

And then, happily, your solution is enterprise-wide.

What Benefits Should I Expect from My ECM Solution?

By now you're probably wondering what benefits you can expect from a carefully considered, strategically deployed enterprise content management solution. You know, beyond going paperless, keeping track of critical documents, managing compliance with ease, and eliminating duplicate versions of documents.

The answer is simple. It will save you both time and money.

The how is a bit more complex. To learn a bit more about "the how," we sat down with Hyland Software's Paul Davis, executive sponsor, to find out more:

- Saving time: The business of highly-effective employees
- Saving money: How ECM translates into ROI

> *"By going with OnBase instead of upgrading to FileNet P8 we instantly saved $400,000... and we evolve the system ourselves at a much lower cost. For instance, developing our current workflow in P8 would have cost $200,000 more."*
>
> – Kimberly Wraight, ECM Coordinator
>   Washtenaw County

Saving Time: ECM Engages Employees, Eliminates Low-Value Tasks

Back in our "pain point" article on employees engaged in low-value tasks, we talked a bit about tasks involving transactional processes, moving paper from one person to the next. You'll remember Whatcom Educational Credit Union, a fast growing financial services company in Whatcom County, Wash, and its growing paper piles – loan applications, membership profiles, and so forth.

With paper physically stored in its main office, whenever a branch employee wanted access to a customer's file, he or she would have to contact HQ. Someone at the main office would have to find the file, find the right document within the file, and fax the paperwork to the branch access a member's file – while the member was standing at the teller window or requiring the customer to leave and return.

Consider once more the time it would take to call the main office, finding someone to retrieve the file, time spent retrieving and faxing the file, and reviewing the fax once it came across. How many customers could the teller help if he or she had instant, secure access to the customer's documentation? What other tasks could he or she pursue in the time they'd get back?

It's this "overall math" of the low-value task that Paul Davis, executive sponsor at Hyland Software, says surprises most companies considering an enterprise content management (ECM) solution.

"A given task might take only two minutes to complete per day," says Davis. "But if it's two minutes per day per transaction and that employee deals with 15 transactions per day, now we're looking at 30 minutes per day to complete those tasks."

That time, multiplied by 260 business days, equals 130 hours. Multiply that by $15 per hour and the "two-minute task" costs almost $2,000 per full-time employee. Multiply that by 10 employees and now you're looking at a significant chunk of change.

"I don't think people often extrapolate out all the way," says Davis. "They just look at it as two minutes of an admin's or clerical staff's time to track something down."

Eliminate the time spent tracking down documents by implementing a carefully considered, strategically implemented ECM software solution, and the math allows a company to reinvest that $20,000.

Take it up a notch and consider the meaningful time – and money – that could be saved in any traditional healthcare setting: the patient registration process.

"Well known to some is the fundamental dependency healthcare has on the very first step of the process: Registration Scanning, called either paperless registration or Front Office Scanning," says Davis. "The registration clerk oftentimes has been in his or her role for years – and is so ingrained in how he or she registers patients, perhaps by photocopying the patient's driver's license and insurance card – that the clerk is very reluctant to learn a new system or process. And yet, if the clerk does something as simple as scanning the wrong side of the driver's license or insurance card, the negative impact downstream for billing and patient safety can be monumental."

Saving Money: How ECM Translates into ROI

For many companies, investing in an enterprise content management (ECM) solution means a significant capital investment. And like any capital investment, you want to know that what you're purchasing is going to pay for itself. You know, produce a return on investment (ROI).

With an ECM software solution, there are some fundamental cost savings that quickly rise to the top, including reduced paper consumption, reclaimed floor space once you ditch your "physical document storage" (your filing cabinets and cardboard boxes), and elimination of other services like offsite storage, courier and shipping fees, microfiche and film creation and so on.

For example, Moen, known for its elegant selection of kitchen faucets, sinks, bathroom faucets and accessories, implemented Hyland Software's OnBase software solution by integrating it with its SAP solution and supporting its AP needs. Beyond increasing invoice processing speed and faster problem resolution, Moen reduced paper, manual processing and storage costs to the tune of $8,000 in monthly savings.

"More difficult to identify, but no less real are the costs eliminated through the use of workflow for transactional business process automation," says Paul Davis, executive sponsor at Hyland Software. Some of the highlights:

- Capturing early payment discounts on AP invoices
- Ensuring that previously negotiated contract discounts are applied throughout the contract term
- Elimination of duplicate payments to vendors
- Issue resolution on the first call, often an inbound call, without the need for inefficient research methods and a return call for resolution
- Demonstrable, documented compliance with industry regulations that otherwise carry financial penalties for nonconformance

Back to Moen for a quick example of issue resolution. Before implementing OnBase, there was no timely way to track down a paper invoice if a vendor called with a question. Now, AP associates have instant access to both the invoice and all supporting documents. Vendor issues are resolved faster and Moen increases its chances to increase favorable payment terms.

Training savings

"Companies are often concerned about retraining costs for employees learning a new system," Davis explains. "With the ability to integrate with core applications people already know, the need for retraining is limited.

"For many users, simply learning that a certain keystroke will now retrieve a related document to the content of a given screen, or the ability to extract information from that screen to populate forms, index documents or initiate workflows, brings tremendous power to these core system users."

And often, they're not even aware that a new ECM technology has been implemented.

Side note. On our Hyland Software blog, our government subject matter expert, Terri Jones, goes even further into this idea with a three-part series on Total Cost of Ownership, or TCO, which is well worth reading. In the series, she tackles the "particularly vexing question" of TCO, given that companies often purchase software through a request for proposal process.

"The problem with this is that the vendors' responses often focus on the features and functionality of the product," she writes. "But how can a [company] base its buying decision on this alone, when it also needs to know if and how this product will improve over time, be supported, serviced, and so forth?

Check out Terri's series on Blog.Hyland.com to learn even more.

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