BEYOND THE REPOSITORY

DEFENDING YOUR HYLAND SOLUTION AGAINST CONTENT CONTENDERS

Hyland®

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"Do we still need Hyland?"

You may have been asked this question. And we get it — we actually appreciate the challenge. It means our customers are evolving and working to stay at the top of their game. That's the kind of partner we want to keep: engaged, curious and driven.

In this ebook, we'll walk through the three core differentiators between Hyland's content services platform and what may seem like comparable solutions, as well as provide a checklist for evaluating key content capabilities.

> " Why do we still need Hyland when we can store content in our [fill in the blank] business application?"
>
> – Responsible IT Leaders

When organizations are investing in a new business application, the question, **"Is Hyland's content management platform still needed?"** will likely come up, whether from IT, operations leaders, budget hawks or even yourself. After all, the new application can also store files, so … do you still need Hyland?

It's a great question, and your organization is smart to ask. We work with clients all the time who have found their technology investments are sprawling, uncontrolled and under-deployed. And, we wouldn't wish it on you.

This question often comes up when your organization is considering investing in a modern enterprise application such as:

- Enterprise resource planning (ERP) applications
- Human resources information systems (HRIS)
- Customer relationship management (CRM) systems
- Healthcare information management (HIM) systems
- Student information systems (SIS)
- Financial services applications
- Insurance management systems

These applications are significant investments, and they often offer some lightweight file management capabilities. It's understandable that your team asks for due diligence to maximize the return on investment and reduce technology overlap.

Differentiator No. 1:
Not all repositories are equal

Chances are, your new application wasn't designed with the primary purpose of storing content, and that function can't be treated as a secondary concern. It's important to evaluate the alternative repository against the needs of your organization. For example, how does it measure up to your needs for:

- **File formats —** Can the repository manage all necessary file formats, such as emails, PDFs, images, office documents, videos and other rich media files?

- **Batch uploads —** Can users scan or upload more than one document at a time into this repository?

- **Multi-user access —** Will everyone who needs access, inside and outside the organization, be able to securely view and interact with the content if it is stored in this repository?

- **Restricted content —** Can access to specific content be restricted by user or role?

- **Granular permissions —** Does the system provide granular user permissions for uploading, viewing, editing, downloading, emailing, printing and/or deleting specific documents?

- **Audit trail —** Does this content repository provide an audit trail of all content-related user activity?

- **Encryption —** Does this repository allow for encryption and redaction of sensitive information contained within the content and metadata, such as credit card and ID numbers?

- **Content workflows —** Can uploaded content be routed through workflows to identify and amend misfiled documents, incomplete forms or incorrect information prior to being accessible?

- **Records management —** Can records management rules be applied to both protect the content from early deletion and to destroy the content according to published retention periods?

- **Scalability —** Has the repository been designed to handle large volumes of content without negatively impacting the performance of the system or size of the database?
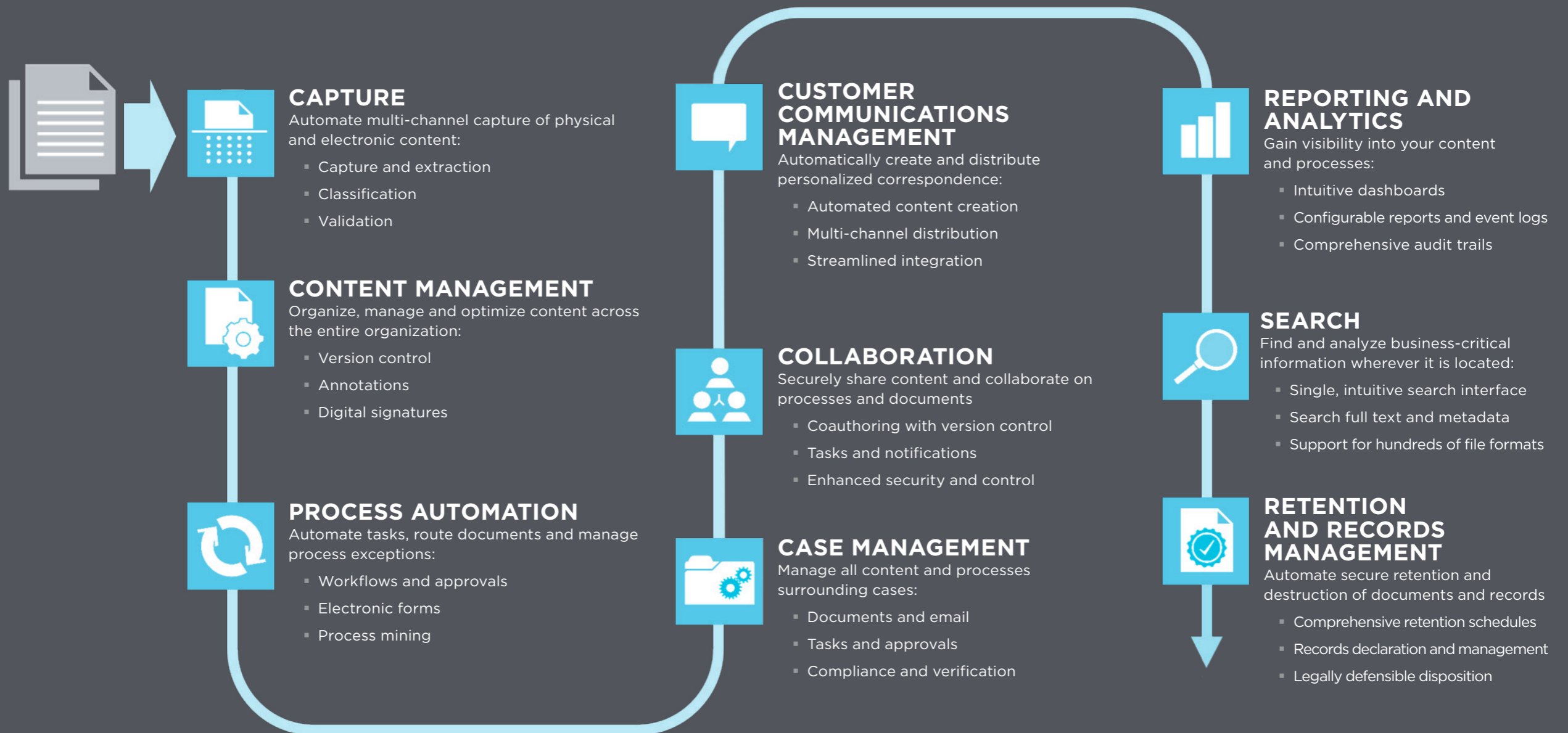
Differentiator No. 2:

Hyland is more than a repository

If the competing repository meets the needs we just outlined, you should next evaluate the other areas of the information lifecycle where your Hyland solution may be providing value.

While other core business applications sometimes participate in this information lifecycle, they don't drive it. That wasn't the primary purpose they were designed for. This interconnecting space between core functions is where your organization generates real business value, and where the whole range of content services from Hyland comes into play.

HOW EXPANDED SERVICES SET HYLAND APART FROM CONTENT CONTENDERS

Repository functionality is critical for managing content storage, but the business process involves so much more. A lot of other activity happens around your content — from intelligent capture all the way through to final disposition and destruction. Here's how Hyland goes beyond the repository.

CAPTURE
Automate multi-channel capture of physical and electronic content:

- Capture and extraction
- Classification
- Validation

CONTENT MANAGEMENT
Organize, manage and optimize content across the entire organization:

- Version control
- Annotations
- Digital signatures

PROCESS AUTOMATION
Automate tasks, route documents and manage process exceptions:

- Workflows and approvals
- Electronic forms
- Process mining

CUSTOMER COMMUNICATIONS MANAGEMENT
Automatically create and distribute personalized correspondence:

- Automated content creation
- Multi-channel distribution
- Streamlined integration

COLLABORATION
Securely share content and collaborate on processes and documents

- Coauthoring with version control
- Tasks and notifications
- Enhanced security and control

CASE MANAGEMENT
Manage all content and processes surrounding cases:

- Documents and email
- Tasks and approvals
- Compliance and verification

REPORTING AND ANALYTICS
Gain visibility into your content and processes:

- Intuitive dashboards
- Configurable reports and event logs
- Comprehensive audit trails

SEARCH
Find and analyze business-critical information wherever it is located:

- Single, intuitive search interface
- Search full text and metadata
- Support for hundreds of file formats

RETENTION AND RECORDS MANAGEMENT
Automate secure retention and destruction of documents and records

- Comprehensive retention schedules
- Records declaration and management
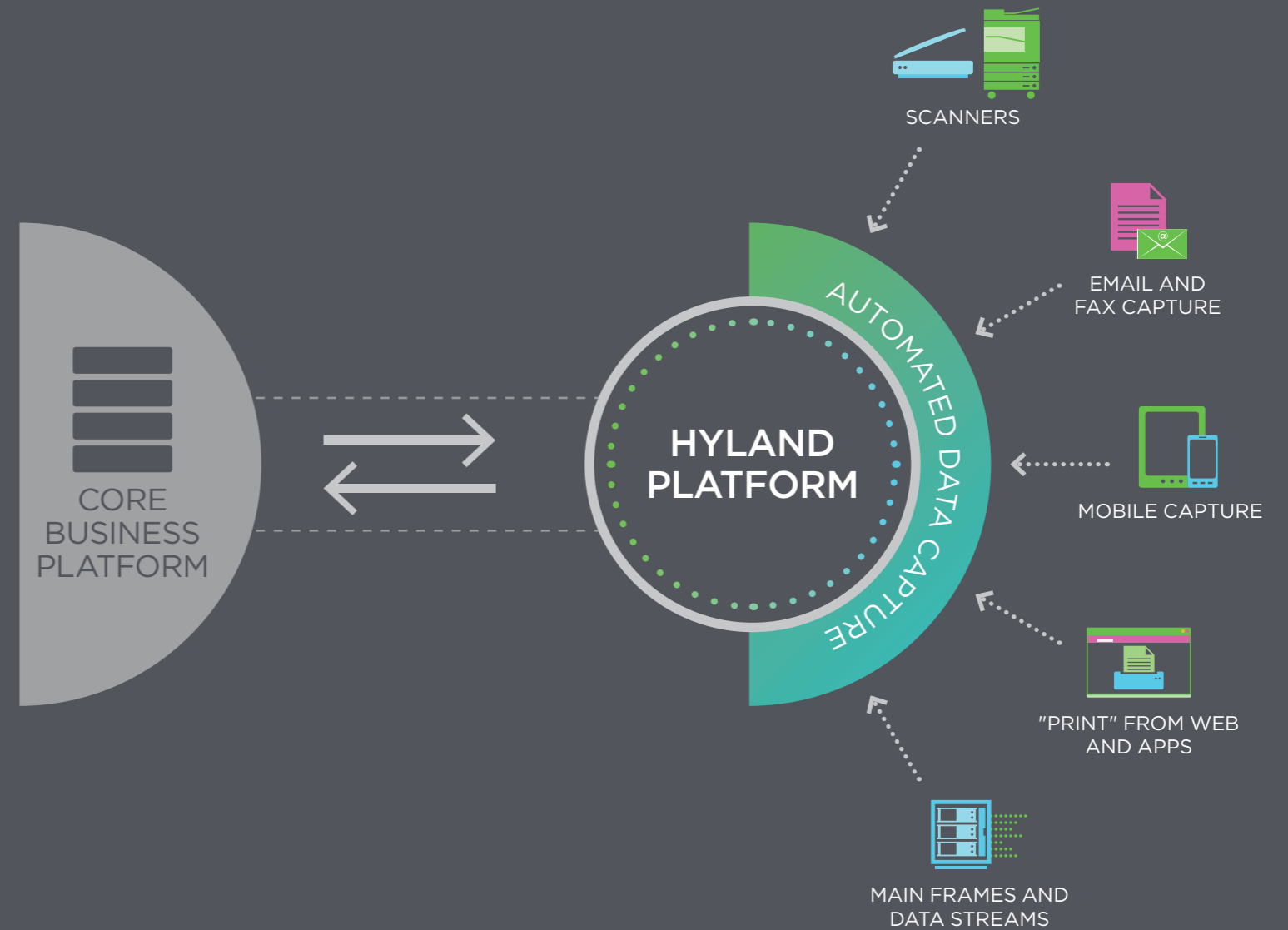- Legally defensible disposition

CAPTURE

All critical content is captured as early in the process as possible, with minimal manual data entry.
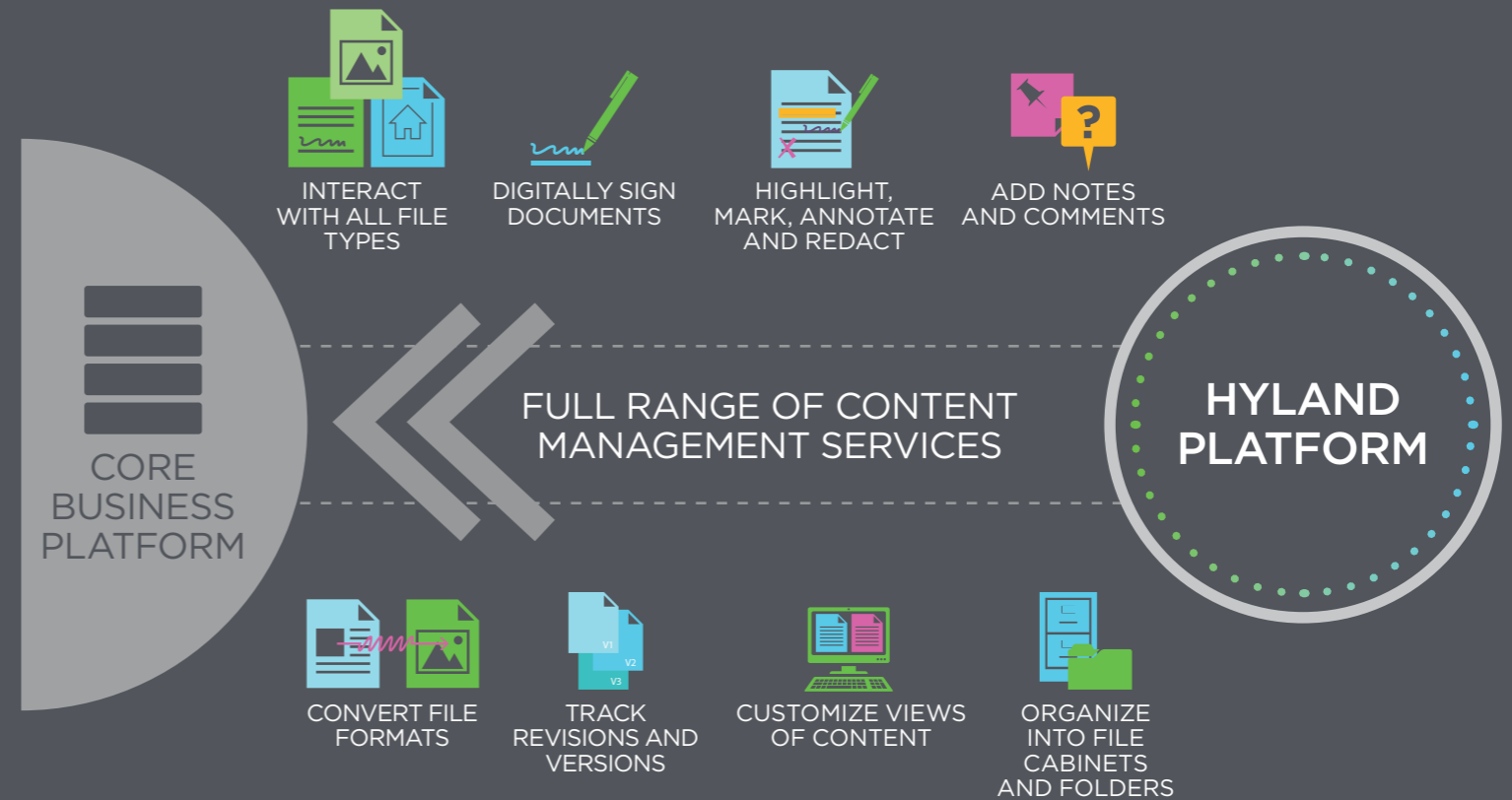
- Digitizes paper documents as early in the process as possible by equipping users with the ability to scan documents at point-of-origin, such as via mobile devices, desktop scanners, shared multi-function printing devices and production scanners

- Makes it easy for internal and external users to upload electronic documents by embedding upload capabilities into the user interface of your core business, office and email applications

- Eliminates as much manual data entry across your organization as possible by utilizing intelligent, automated and assisted capture methods

CORE BUSINESS PLATFORM

HYLAND PLATFORM

AUTOMATED DATA CAPTURE

SCANNERS

EMAIL AND FAX CAPTURE

MOBILE CAPTURE

"PRINT" FROM WEB AND APPS

MAIN FRAMES AND DATA STREAMS

CONTENT MANAGEMENT

Your users are equipped with all the tools they require to digitally interact with documents.
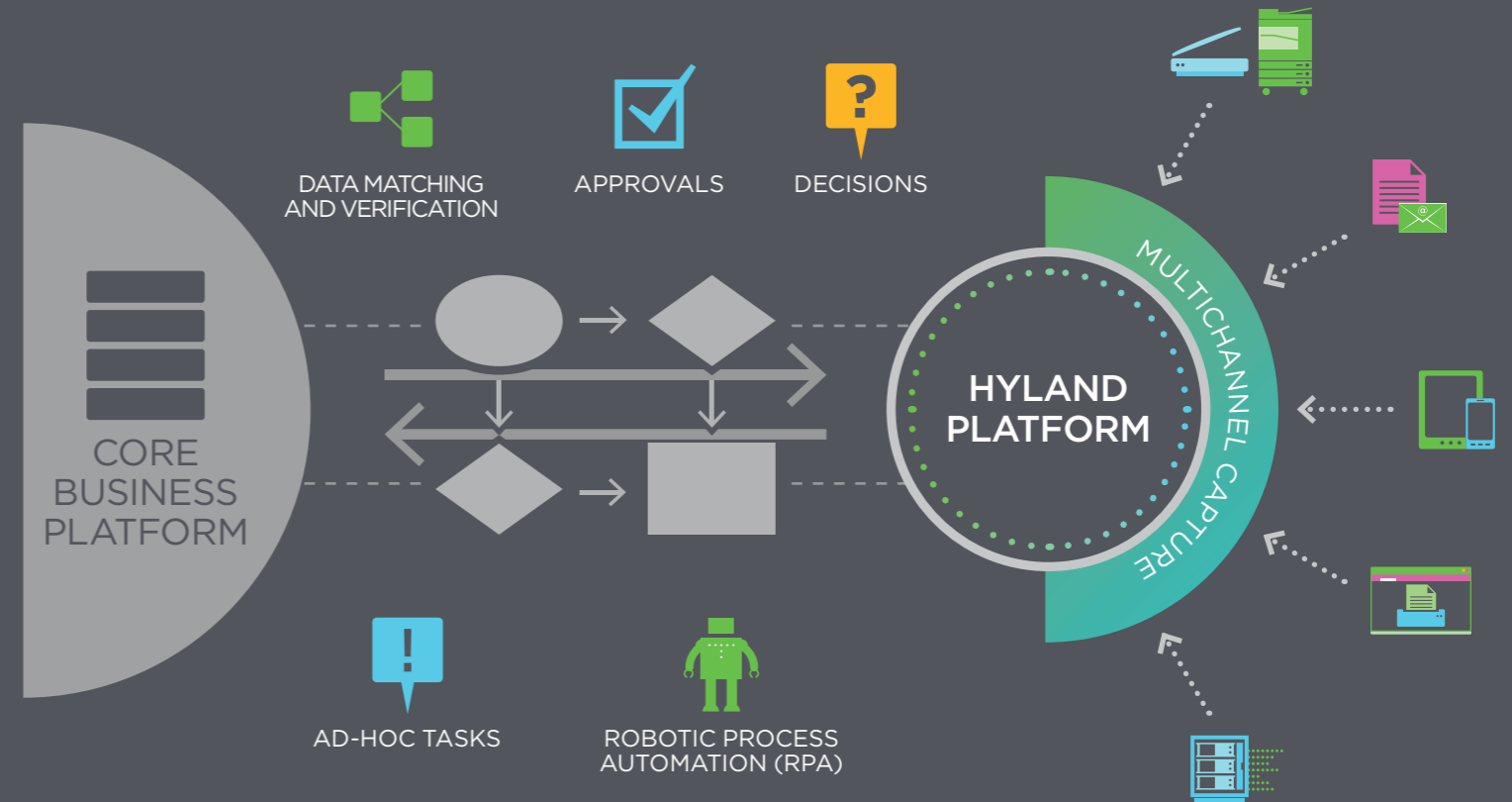
- Manages versions and revisions to ensure users access the most current content

- Adds notes, stamps and other markups to support collaboration and processes

- Uses electronic signatures to streamline processes and strengthen security

- Integrates content management tasks with your core business system to streamline business processes and the user experience

CORE BUSINESS PLATFORM

INTERACT WITH ALL FILE TYPES

DIGITALLY SIGN DOCUMENTS

HIGHLIGHT, MARK, ANNOTATE AND REDACT

ADD NOTES AND COMMENTS

FULL RANGE OF CONTENT MANAGEMENT SERVICES

HYLAND PLATFORM

CONVERT FILE FORMATS

TRACK REVISIONS AND VERSIONS

CUSTOMIZE VIEWS OF CONTENT

ORGANIZE INTO FILE CABINETS AND FOLDERS

PROCESS AUTOMATION

Adds document-specific workflows and extends your processes.
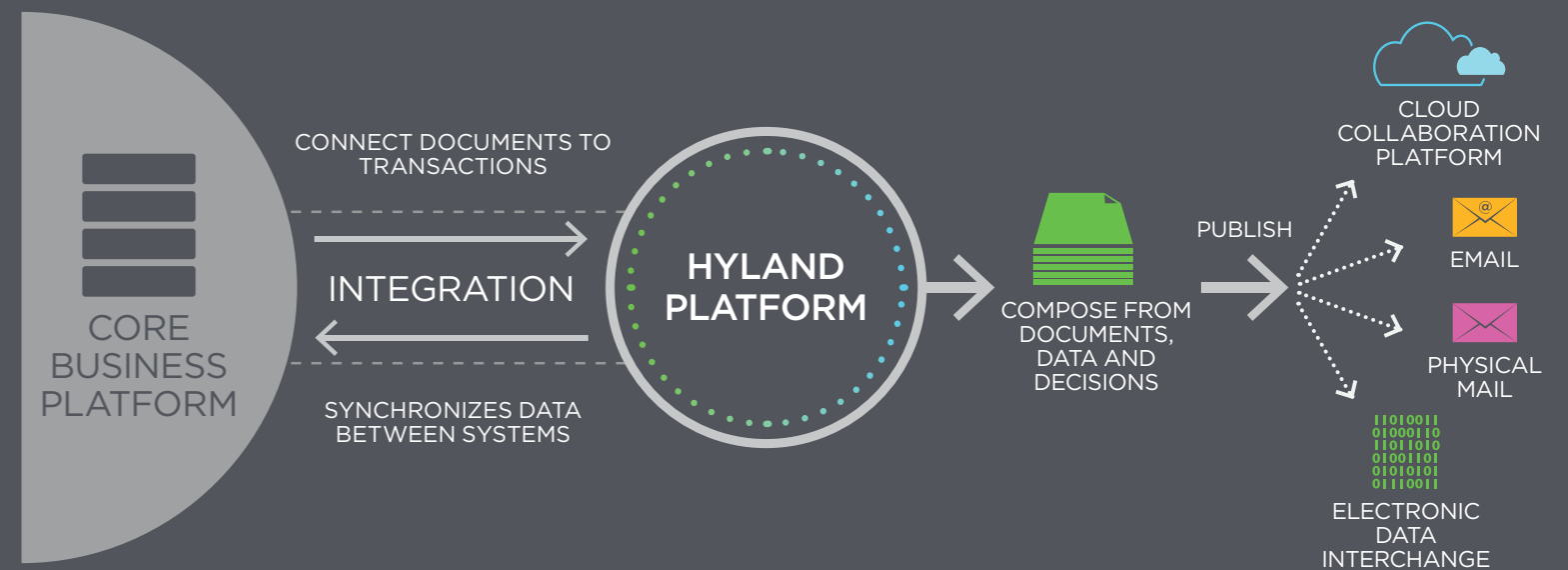
- Easily configures and deploys rules-based automated workflows, notifications and approval processes

- Dynamically surfaces relevant tasks to users based on business rules

- Uses Robotic Process Automation (RPA) to automate manual, rule-based, high-volume and repetitive tasks

- Adds checks for completeness, accuracy and validity, and triggers notifications and exceptions as necessary

CORE BUSINESS PLATFORM

DATA MATCHING AND VERIFICATION

APPROVALS

DECISIONS

AD-HOC TASKS

ROBOTIC PROCESS AUTOMATION (RPA)

HYLAND PLATFORM

MULTICHANNEL CAPTURE

CUSTOMER COMMUNICATIONS MANAGEMENT

Automates the generation and distribution of customer communications wherever possible.
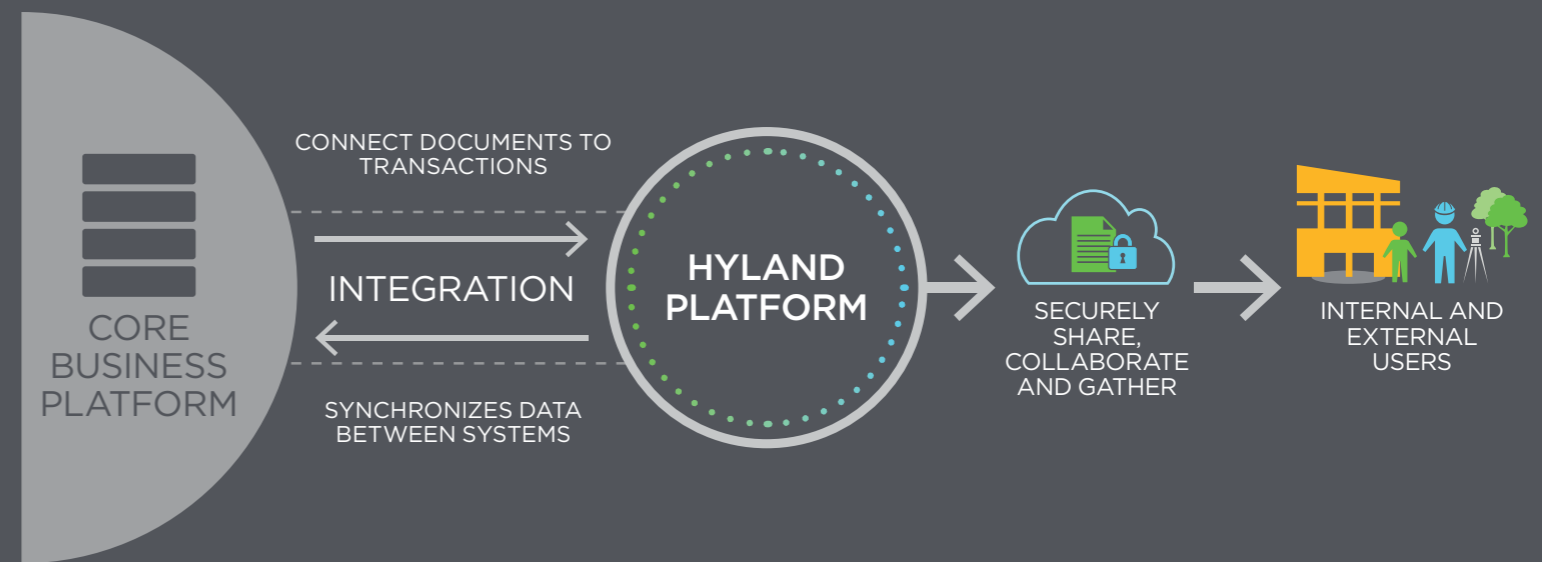
- Easily configures templates to standardize communication types

- Dynamically pulls data from multiple source systems to create personalized communication

- Publishes or exports to the formats that fit the needs of customers and your organization

- Ensures all relevant and up-to-date legal and regulatory information is always included

CORE BUSINESS PLATFORM

CONNECT DOCUMENTS TO TRANSACTIONS

INTEGRATION

SYNCHRONIZES DATA BETWEEN SYSTEMS

HYLAND PLATFORM

COMPOSE FROM DOCUMENTS, DATA AND DECISIONS

PUBLISH

CLOUD COLLABORATION PLATFORM

EMAIL

PHYSICAL MAIL

ELECTRONIC DATA INTERCHANGE

COLLABORATION
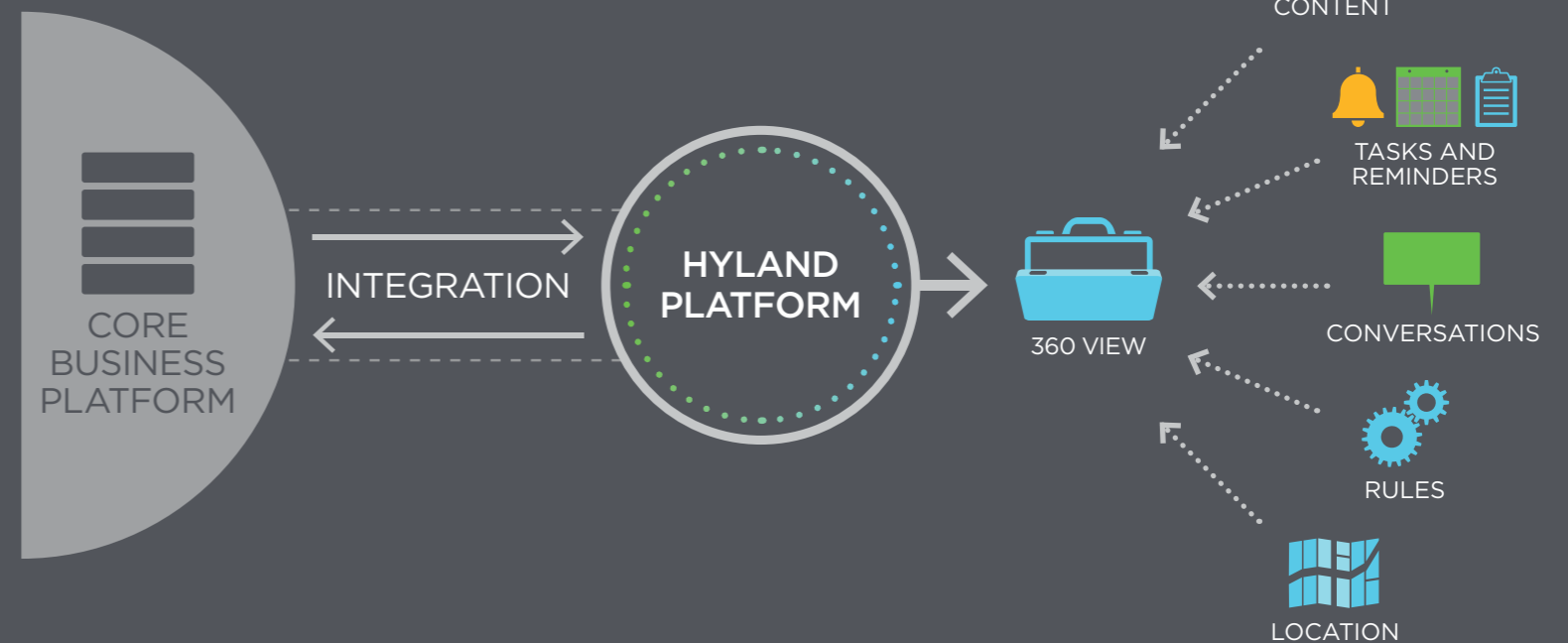
Collaboration tools maximize control and security.

- Enjoy scalability, security and accessibility of a cloud-based solution while retaining full ownership and control

- Easily make edits and comments or create and assign tasks for shared files

- Protect shared data and maintain complete visibility into sharing, access and changes

- Automate the sharing of content by integrating your cloud-based sharing tool with your business workflows

CORE BUSINESS PLATFORM

CONNECT DOCUMENTS TO TRANSACTIONS

INTEGRATION

SYNCHRONIZES DATA BETWEEN SYSTEMS

HYLAND PLATFORM

SECURELY SHARE, COLLABORATE AND GATHER

INTERNAL AND EXTERNAL USERS

CASE MANAGEMENT

Manage all the data associated with tasks, activities, conversations and reminders alongside your content and processes.
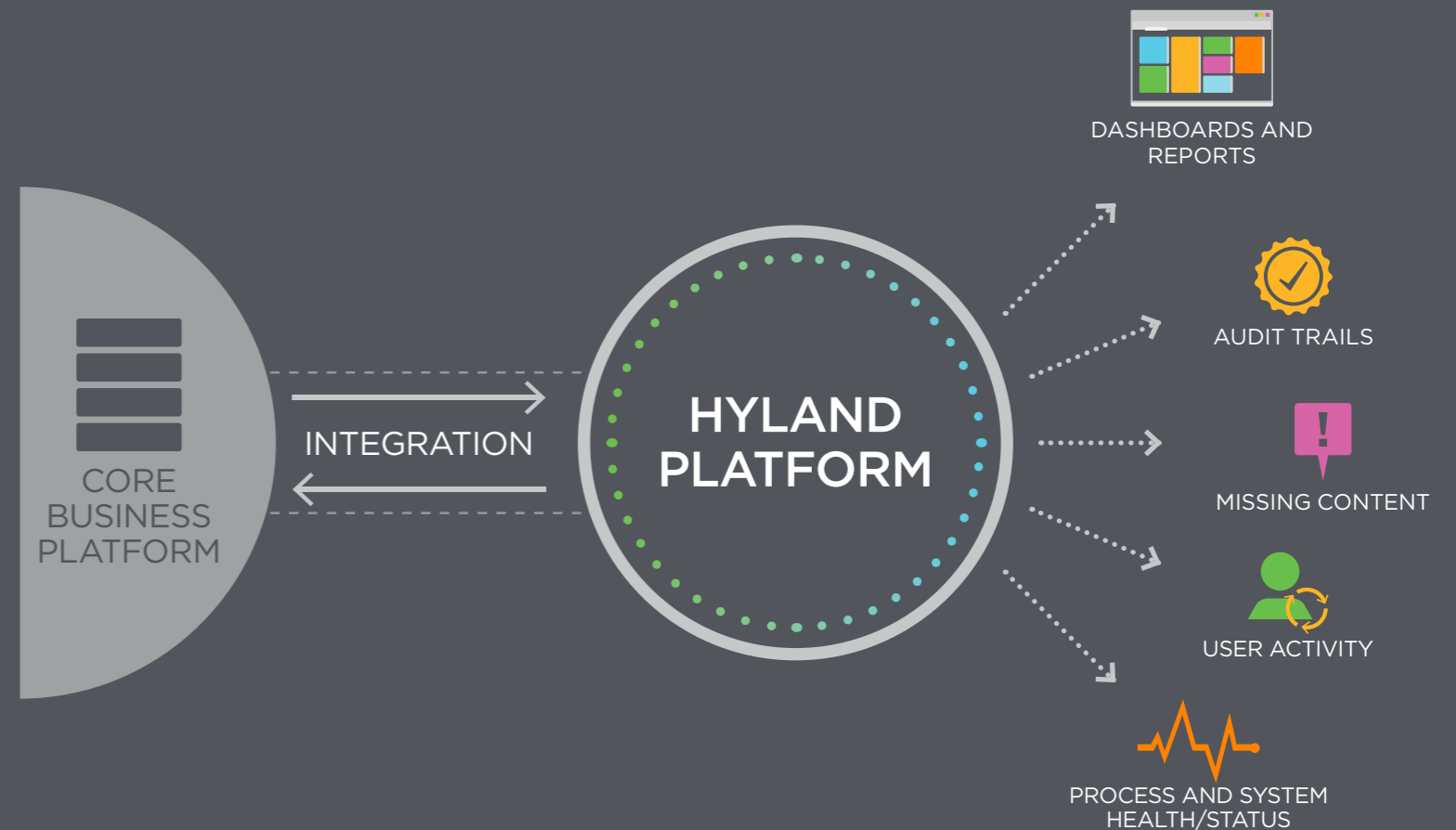
- Standardize best practices, automate repetitive tasks and manage supporting information and documents with a single solution

- Facilitate user collaboration through notes, threaded discussions and the history of activity surrounding a case

- Increase transparency and support compliance with comprehensive dashboards and audit trails

- Create data-driven applications to handle exceptions and investigations, which occur within your document-driven workflows

CORE BUSINESS PLATFORM

INTEGRATION

HYLAND PLATFORM

360 VIEW

CONTENT

TASKS AND REMINDERS

CONVERSATIONS

RULES

LOCATION

REPORTING AND ANALYTICS

Provides a variety of dashboards displaying the status of processes, cases, user activity and overall system health.
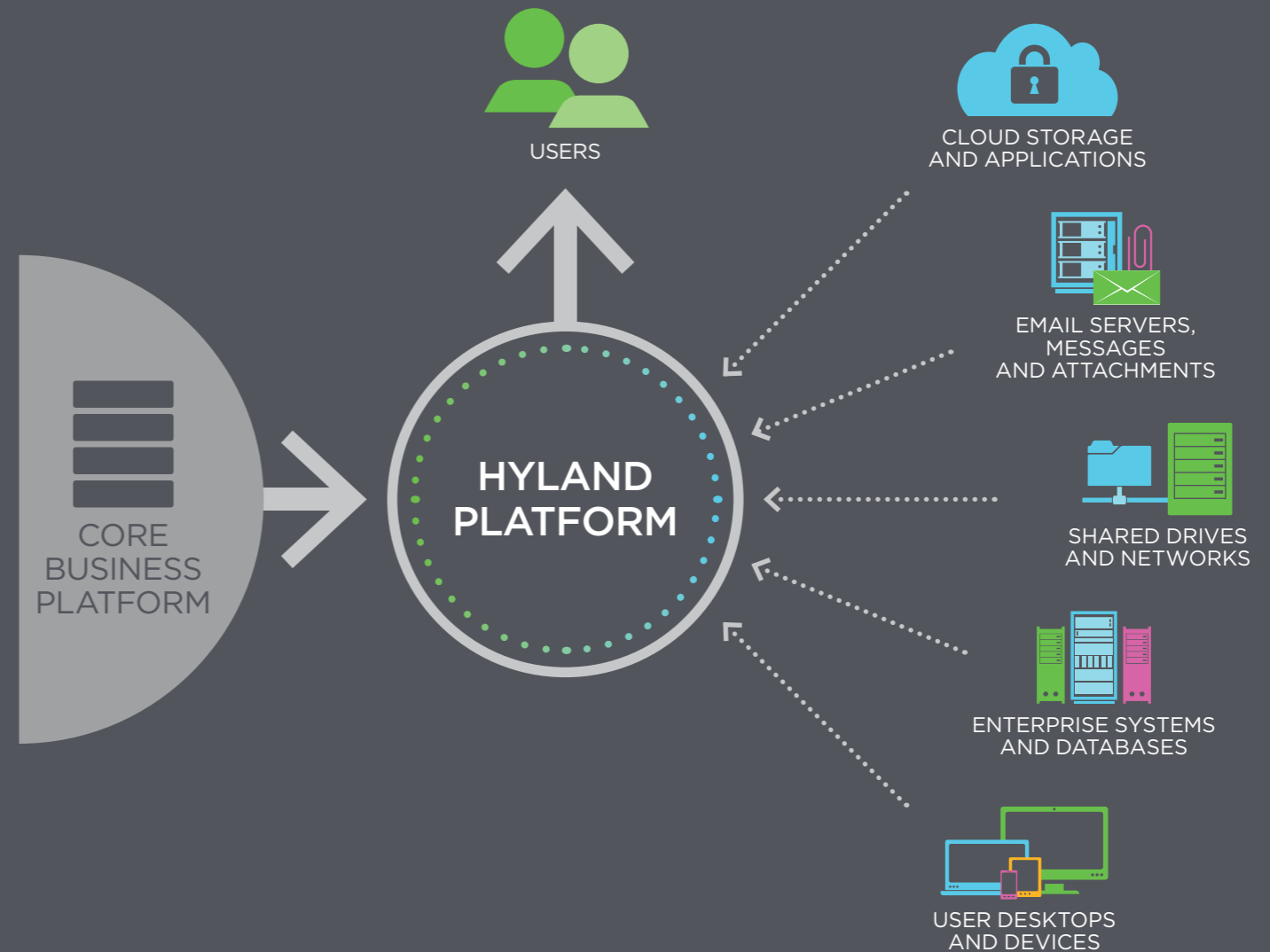
- Gives users configurable visibility into relevant processes and systems

- Simplifies audits and eDiscovery with comprehensive audit trails and logs

- Proactively identifies missing, aging or expired content and notifies the appropriate individuals automatically

- Provides external access to reports to keep your employees from being distracted by audits and data requests

CORE BUSINESS PLATFORM

INTEGRATION

HYLAND PLATFORM

DASHBOARDS AND REPORTS

AUDIT TRAILS

MISSING CONTENT

USER ACTIVITY

PROCESS AND SYSTEM HEALTH/STATUS

SEARCH

Provides the ability to quickly find specific information from information stored in multiple locations.

- Searches across hundreds of systems, repositories and file formats from a single interface

- Uses intuitive query design tools, relevancy rankings and refiners to get to the right information faster

- Uses pattern searching (Social Security numbers, credit card numbers, etc.) to locate unauthorized private and confidential data across the organization

- Searches beyond full text to find content hidden in comments, annotations and metadata

CORE BUSINESS PLATFORM

HYLAND PLATFORM

USERS

CLOUD STORAGE AND APPLICATIONS

EMAIL SERVERS, MESSAGES AND ATTACHMENTS

SHARED DRIVES AND NETWORKS

ENTERPRISE SYSTEMS AND DATABASES
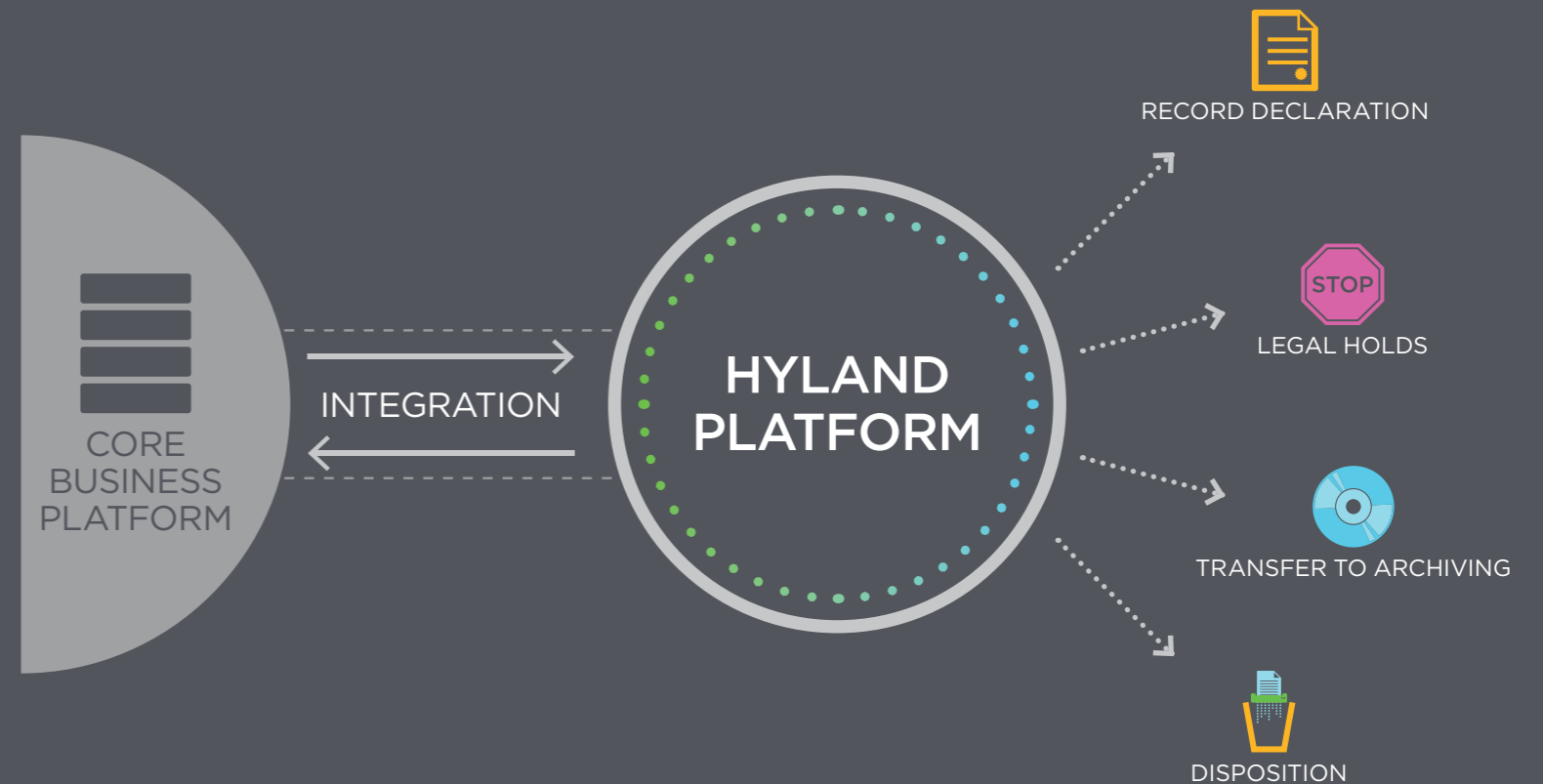
USER DESKTOPS AND DEVICES

RETENTION AND RECORDS MANAGEMENT

Implements retention periods to ensure your content is being preserved and will be destroyed according to published requirements.

- Automates all retention tasks including approvals, transfer to storage, legal holds, archival and deletion based on policies and regulations

- Centralizes management of physical records alongside electronic records, with uniform retention policies and chain of custody

- Provides defensible auditing for the entire lifecycle of your records

- Ensures critical information is protected from early deletion by unauthorized users and can be placed on hold to protect from automated deletion when under audit or litigation

CORE BUSINESS PLATFORM

INTEGRATION

HYLAND PLATFORM

RECORD DECLARATION

LEGAL HOLDS

STOP

TRANSFER TO ARCHIVING

DISPOSITION

Differentiator No. 3: Platform-level considerations

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Do we still need Hyland?

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Differentiator No. 2: Hyland is more than a repository

Differentiator No. 3: Platform-level considerations

Checklist: Evaluating content capabilities

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The expanded content services that set Hyland apart aren't the only differentiators. The platform that powers your solutions is equally important, but not all platforms are created equal. When evaluating a competing product, be sure to also take measure of critical operational fundamentals:

Information security

Hyland helps you protect your data and the privacy of your customers with comprehensive security capabilities from granular access controls to group policies, encryption and replication.

User experience

From adaptable interfaces to streamlined persona-based apps, Hyland helps you create better user experiences for employees and customers.

Integration

By easily integrating with enterprise platforms and third-party applications, Hyland helps you share information across your systems and increase the efficiency of your users.

Scalability

Hyland platform architecture is designed to manage high volumes of content to help you effortlessly expand capacity and performance of your on-premises or cloud environments.

Agility

Hyland's intuitive configuration options allow you to change and add functionality to easily adapt to the changing business and customer requirements.

Extensibility

Leverage our top-shelf technology to enable your own solutions, or configure new applications using our low-code rapid application development platform.

Checklist: Evaluating content capabilities

Your Hyland platform is designed to complement and enhance core business platforms and applications — not to compete with them. Use the following checklists to help evaluate competing software.

Repository evaluation

Use this guide to launch an initial discovery of the content capabilities of whatever application your team is evaluating. In just 10 questions, you'll uncover where it stands on essential repository capabilities for long-term use across the enterprise.

		Yes/No	Hyland
FILE FORMATS	Can the repository manage all necessary file formats? E.g. emails, PDFs, images, office documents and rich media files?		**YES**
BATCH UPLOADS	Can users scan or upload more than one document at a time into this repository?		**YES**
MULTI-USER ACCESS	Will everyone needing access, inside and outside the organization, be able to securely view and interact with the content if it is stored in this repository?		**YES**
RESTRICTED CONTENT	Can access to specific content be restricted by user or role?		**YES**
GRANULAR PERMISSIONS	Does the system provide granular user permissions for uploading, viewing, editing, downloading, emailing, printing and/or deleting specific documents?		**YES**
AUDIT TRAIL	Does this content repository provide an audit trail of all content-related user activity?		**YES**
ENCRYPTION	Does this repository allow for encryption and redaction of sensitive information contained within the content and metadata (e.g. credit card, ID numbers)?		**YES**
CONTENT WORKFLOWS	Can uploaded content be routed through workflows to identify and amend misfiled documents, incomplete or incorrect information prior to being accessible?		**YES**
RECORDS MANAGEMENT	Can records management rules be applied to protect the content from early deletion and to destroy according to published retention periods?		**YES**
SCALABILITY	Has the repository been designed to handle large volumes of content without negatively impacting the performance of the system or size of the database?		**YES**

If the native repository provided by your core business platform does not include essential capabilities for your long-term information management strategy, it is likely too basic for your needs.

Full content services evaluation

Does the system under evaluation offer the content services you require?

		Yes/No	Hyland
CAPTURE	Multi-channel, intelligent capture allowing content to be captured in any format from any location, device or source with minimal manual data entry.		YES
CONTENT MANAGEMENT	A variety of tools to equip users to digitally interact with content: digital signatures, highlights, annotations, redactions, file-type conversions, revisions and versions.		YES
PROCESS AUTOMATION	The ability to create and change document-centric workflows for your content without relying on code, scripting or the vendor.		YES
CUSTOMER COMMUNICATIONS MANAGEMENT	Automated generation of customer communications with multi-channel distribution — such as email, text and physical mail		YES
COLLABORATION	The ability to securely share documents and collaborate with individuals inside and outside the organization without relying on email, FTP sites or unsanctioned file-sharing tools.		YES
CASE MANAGEMENT	A low-code platform to build applications and solutions to manage data associated with tasks, activities, conversations and reminders relating to your content and processes.		YES
REPORTING AND ANALYTICS	A variety of interactive dashboards displaying the status of content, processes, cases, user activity and overall system health.		YES
SEARCH	The ability to search multiple locations from a single search, utilizing advanced search logic such as wildcards, phrases, Boolean, fuzzy search and natural language processing.		YES
RETENTION AND RECORDS MANAGEMENT	Automated records management and retention to ensure that your content is both preserved and destroyed according to published requirements.		YES
INTEGRATIONS	Pre-built integrations with a variety of systems, office and email applications and repositories, enabling easy content retrieval and upload with an instantaneous exchange of data.		YES
SECURITY	Encryption of data and content at rest, during transmission across a network and while being accessed.		YES
ARCHITECTURE	Scalable, highly performant architecture that will meet the current and future content needs of the organization, on-premises, in a hybrid or pure cloud environment.		YES

Expertly tailored to get the whole job done

We pride ourselves on helping our customers work better, whether that impact is felt through the features of our robust platform, user-optimized applications or extended services. Your Hyland platform is designed to complement and enhance your core business platforms and applications — not to compete with them. We set the bar high and are always moving it higher, so your organization has the modern tools it needs to evolve and grow.

Are you hearing, "Do we still need Hyland?" questions?

Get in touch.

Visit **Hyland.com** and **Hyland Community** for more resources.

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Learn more at **Hyland.com**

NAVIANT®
Process focus. Excellence.