



CONTENT SERVICES | WORKBOOK

# ENHANCE AND OPTIMIZE YOUR HYLAND SOLUTION

Hyland®

# Hyland's content services platform puts your world of information in your hands

## Evaluate your solution against the Hyland gold standard

Focusing on nine core capabilities of content services, this workbook is designed to encompass the ideal elements of any Hyland solution, regardless of industry or department. By assessing your current state, you can determine how to use your solution to its maximum potential going forward.



CAPTURE



CUSTOMER COMMUNICATIONS MANAGEMENT



REPORTING AND ANALYTICS



CONTENT MANAGEMENT



COLLABORATION



SEARCH



PROCESS AUTOMATION

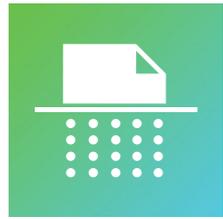


CASE MANAGEMENT



RETENTION AND RECORDS MANAGEMENT

Now, ask yourself, “Has my solution been optimized in each of these areas?” If not, you will quickly find opportunities for improvement and additional value. Each section presents a series of deep-dive questions to help you reflect on new and exciting ways to optimize your Hyland solution.



## CAPTURE

Automate multi-channel capture of physical and electronic content:

- Direct import from various sources
- Automated content classification
- Automated data extraction and validation

No matter where your documents are located or what format they come in, your Hyland solution can capture them right at the source and organize them — and the data they contain — into a single system with minimal human interaction.

## PAPER

**List any paper documents your users process, create or reference:**

Your Hyland solution can capture these documents right at the point of origination, preventing more paper from being introduced into your organization.

**List processes where you could eliminate the cost of printing, storing and/or shipping:**



## SECURITY AND COMPLIANCE CHECK

Are you capturing personal information or other types of data protected by regulations or policies?

- Capture is the perfect time to set classification, access permissions and data retention policies.
- Automating the capture process can help reduce security risk and errors.



## USER EXPERIENCE

Do your users need to be able to capture and act on data from mobile devices? Give them full-featured capabilities to do their jobs, regardless of where they are.

# CAPTURE

## ELECTRONIC

Check the electronic documents and data types you reference outside your Hyland solution:

- PDFs
- Emails
- Forms
- Faxes
- Data streams
- Text reports
- Office documents

Where is this content located?

- SharePoint
- Fax servers
- Cloud storage
- Mainframes
- Personal drives
- File shares
- Mobile devices
- Legacy systems
- Email inboxes

By capturing important electronic documents and data, you eliminate time wasted searching in multiple locations for information.

Think about the systems where manual data entry occurs in your organization.

Where does this data originate?

Paper invoice

Where is it manually entered?

Manually indexed in OnBase and typed into ERP



## INTEGRATION CONSIDERATIONS

Many Hyland solutions can ingest data directly from data streams like XML, EDI and HL7.



## ADDING INTELLIGENCE

How smart is your data capture? Does it automatically:

- Identify and learn document types, without templates?
- Match data to systems of record?
- Launch related workflows?

Adding intelligence to your capture can accelerate and streamline business processes.



## CAPTURE GOLD STANDARD

Capture **all** critical content as early in the process as possible, with minimal manual data entry.



# CONTENT MANAGEMENT

Securely organize, manage and optimize content across the entire organization:

- Version control
- Annotations
- Digital signatures

Hyland solutions simplify how your users interact with the information they need, keeping it organized and accessible, so they can focus on getting their jobs done, instead of on managing folders and filing cabinets.

## MORE THAN JUST STORAGE

Your Hyland solution can capture these documents right at the point of origination, preventing more paper from being introduced into your organization.

### Which compliance regulations impact how you store data?

Data encryption adds an extra layer of protection to your data at rest, in transit or in use, ensuring that it is unusable to unauthorized users or in case of a breach. Encryption is often mandated by industry standards.

**What content in your organization needs to be encrypted while in use, transfer or storage?**

Version control not only ensures that your users always have access to the most current data, but also tracks every modification made to documents, with a permanent revision history which you may need in case of an audit or eDiscovery.

**What documents in your organization require version control?**



## USER EXPERIENCE

Working in another application? Stay there. Hyland offers comprehensive integration options, meaning that your users can access content and interact with business processes directly from the familiar screens of their business-critical applications.



## CONTENT MANAGEMENT

**Check the departments in your organization that you think would benefit from managing signatures electronically:**

- |                 |               |
|-----------------|---------------|
| Accounting      | Sales         |
| HR              | IT/Operations |
| Contracts/Legal | Procurement   |

### EXTERNAL ACCESS

Do people outside your organization need access to your content? With your Hyland solution, you can provide secure access to your partners and external stakeholders including students, patients, customers, constituents, auditors and anyone else who needs to interact with your information. Improve user experience and reduce the burden on your staff by providing these individuals with self-service options.

**Think about the external user who may need access to your information:**



## SECURITY AND COMPLIANCE CHECK

Need to protect confidential information without limiting your user access?

Redaction and data masking can hide Social Security numbers, credit card numbers and other sensitive data either permanently or based on the user access level.



## CONTENT MANAGEMENT GOLD STANDARD

*Equip your users with all the tools they require to digitally interact with documents.*



# PROCESS AUTOMATION

Intelligently automate tasks, route documents and manage process exceptions:

- Workflows and approvals
- Electronic forms
- Process mining

Automating repetitive business processes helps speed up business cycles, simplify auditing with complete process visibility and reallocate employees away from tedious manual processes.

Structured processes that can be mapped on a flowchart — those with predictable steps and outcomes — can be optimized and automated while still delivering meaningful exceptions to the right people.

**List your structured processes that could benefit from process automation. Then, to the right of each, check the key capabilities that you could use to improve each process.**

	Match/ validate data	Route decisions, documents and exceptions	Automate rule-based tasks	Send automatic notifications and approvals	Manage complex approval processes	Load-balance work across teams
AP Invoice Processing	✓	✓	✓	✓	✓	✓



## ANALYTICS INSIGHTS

Want to take process improvement to the next level? Process Mining from Hyland analyzes detailed process data to identify bottlenecks and drive process efficiency.



## USER EXPERIENCE

Users burdened with a high volume of manual, repetitive data tasks? Robotic process automation (RPA) can automate rule-based tasks where human touch does not add business value.



## PROCESS AUTOMATION GOLD STANDARD

*Add document-specific workflows to your most important content.*



# CUSTOMER COMMUNICATIONS MANAGEMENT

Automatically create and distribute personalized correspondence:

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

Improve relevancy and effectiveness of customer communication, significantly reduce time and resource requirements needed to generate and distribute it, and ensure all relevant legal and regulatory information is always included.

**Is your company focused on the customer experience? If so, how?**

**Is it a challenge today to create personalized and consistent communications?**

- Yes
- Sometimes
- No

**Are you able to leverage rich data from multiple systems to interact with customers?**

- Yes
- Sometimes
- No

**Are you leveraging the most up-to-date, omni-channel outputs?**

- |       |              |       |
|-------|--------------|-------|
| Email | Web portal   | Phone |
| Print | Text message |       |



## SECURITY AND COMPLIANCE CHECK

Need to ensure that accurate, up-to-date legal and compliance information is always included in external communication? It's just one of the useful things Content Composer from Hyland helps you manage for multiple audiences and channels.



## CUSTOMER COMMUNICATIONS MANAGEMENT GOLD STANDARD

*Automate the generation and distribution of customer communications wherever possible.*



# COLLABORATION

Securely share content and collaborate on processes and documents:

- Co-authoring with version control
- Tasks and notifications
- Enhanced security and control

It's inevitable — your users need to share information with each other, and with people outside of your organization. It's up to you to provide them with a simple, intuitive, easy-to-use method of sharing that is also secure.

## MEETING USER EXPECTATIONS

**What tools or processes do your users currently use to share content:**

With each other?

With parties external to the organization?

**What file formats do your users share?**

PDFs

Videos

Office documents

Text reports

Emails

Images

**How do your users collaborate around documents?**

Co-authoring

Tasks

Reviews

Approvals



## INTEGRATION CONSIDERATIONS

Sharing and collaboration features can be fully integrated with your core content management system like OnBase or Perceptive Content for a streamlined, automated process.



## COLLABORATION

### KEEPING IT SECURE

**How do you ensure that sensitive documents aren't shared with the wrong parties, either internal or external?**

**Which compliance regulations impact how you share data?**

**Does your current sharing process meet compliance requirements?**

Yes                      No                      Maybe

**How do you handle an individual's files when they leave the organization?**

**How do you keep track of to whom documents are shared?**

**How do users external to your organization input documents into your core content management system like OnBase or Perceptive Content?**



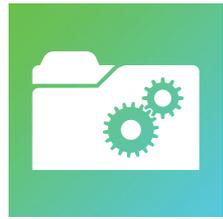
## SECURITY AND COMPLIANCE CHECK

An enterprise-grade collaboration platform like ShareBase provides many levels of control over shared content, from encryption and passwords to expiring links, version control and complete audit trails.



## COLLABORATION GOLD STANDARD

*Don't sacrifice control and security when providing sharing and collaboration tools.*



# CASE MANAGEMENT

Manage all data, tasks, activities, correspondence and events surrounding unstructured cases:

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

Provide a 360-degree view into the information users need to make decisions, free up case workers to focus on delivering customer value and not on paperwork, increase productivity and ensure process continuity.

Even in your automated processes, there are steps that require you to gather and manage data. Your knowledge workers must use discretion and make decisions to manage exceptions, cases and unpredictable processes that involve many tasks, people, documents, events, dates, etc.

## What challenges do your knowledge workers most often face?

- |  |  |
|--|--|
| Excessive use of spreadsheets            | Inability to accurately report on process status |
| Lack of collaboration                    | Conflicting data sources between departments     |
| Struggle to delegate tasks               | Difficulty tracking related documents            |
| Disconnected documents, data and folders | Too many dates and expirations to manage         |

Hyland helps you tackle these and other challenges with a low-code application platform for data-centric and case management applications, replacing antiquated departmental databases, shared spreadsheets and legacy systems.

## Where can you use a low-code platform to create new or replace existing applications?

- |                                |                               |                   |
|--------------------------------|-------------------------------|-------------------|
| Contract management            | Employee onboarding           | Lease management  |
| Capital expenditure management | Facilities project management | Process control   |
| Compliance management          | Incident and issue handling   | Vendor management |
|                                | IT help desk issues           |                   |



## USER EXPERIENCE

No one knows your processes like you do! Building your own application with our low-code platform allows you to:

- Provide workers with a 360-degree view of all the information they need to support a specific customer, case or project
- Natively manage and connect data, documents, notes and correspondence
- Schedule events, delegate tasks, log activities and collaborate with other individuals
- Increase visibility with built-in reporting dashboards and full audit trails
- Seamlessly integrate with existing information systems



## CASE MANAGEMENT GOLD STANDARD

*Manage all the data associated with tasks, activities, conversations and reminders alongside your content and processes.*



# REPORTING AND ANALYTICS

Gain visibility into your content and processes with actionable insights:

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

Reduce inefficiencies and drive better decisions, keep your employees from being distracted by audits and data requests, and proactively monitor processes for policy compliance.

## Match each capability to the benefit

Type the number of the definition next to the capability:

Monitor	1. Ensure compliance with internal and external standards and avoid costly fines by identifying missing, incomplete or out-of-date information. Provide auditors with access via a secure website, allowing them to perform their work without coming on site.
Audit	2. Mine detailed historical process data to identify bottlenecks and drive process efficiency.
Report	3. Run historical reports without relying on IT. A library of pre-configured reports provide information to use for budgeting and resource planning, including system usage and performance, licensing, processing times, bottlenecks and more.
Analyze	4. Gain real-time visibility and immediate, actionable insights about the status of critical business processes.



## USER EXPERIENCE

Keep your employees from being distracted by audits and data requests by giving external auditors and other parties their own restricted access to just the right data.



## REPORTING AND ANALYTICS

### MONITORING

Which users would benefit from real-time visibility into processes?

Which processes?

### AUDITING

If an auditor walked in the door and required access to information, how would you feel? Select one:

Why?



What information do you need to regularly verify the existence, accessibility and accuracy of?



## SECURITY AND COMPLIANCE CHECK

Robust reporting capabilities can simplify audits and eDiscovery with comprehensive audit trails and logs.



## REPORTING AND ANALYTICS

### REPORTING

**List business processes you would like to enable your users to report on and analyze.**

*e.g., cash flow in AR process*

**List the areas of your Hyland application you'd like insights into.**

*e.g., usage, performance, licensing*

**What benchmarks would help you prove and track the ROI of your solution?**

### ANALYTICS

**What processes could benefit the most from a thorough analysis of cycle times, bottlenecks, exceptions and rework?**



### REPORTING AND ANALYTICS GOLD STANDARD

*Provide a variety of dashboards displaying the status of processes, cases, user activity and overall system health.*



# 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

Help employees find the information they need faster, locate unprotected sensitive data across the enterprise, simplify audits and speed up eDiscovery and other data request fulfilment.

## TOO MANY PLACES TO LOOK

**Chances are, your users need access to content outside your core content management system like OnBase or Perceptive Content. In what other locations do they store or access information?**

- |  |                                   |
|--|-----------------------------------|
| Cloud storage apps                     | Third party websites/applications |
| Network drives/file shares             | User devices and drives           |
| Core business systems (ERP, CRM, etc.) |                                   |
| Intranet or SharePoint sites           |                                   |
| Legacy ECM repositories                |                                   |

**Which of these features would make it easier for your users to find information they need?**

- |   |  |
|---|--|
| Single interface to search all locations  | Automated search notifications when new results matching their query are found |
| Ability to save frequently-used queries   |  |
| Support for viewing hundreds of file formats without needing the native application |  |
| Ability to search comments, annotations and metadata                                |  |



## USER EXPERIENCE

Each time a user has to break away from their core application and search for information in another, there is a potential for delay and disruption. Enterprise Search from Hyland provides a single user interface to search all locations.

## SEARCH

### DARK DATA

#### How do you currently ensure that sensitive data does not end up in unauthorized locations?

Select one:

**Policy** — We have our users read and acknowledge our corporate data security policy and trust that they do the right thing.

**Policy and training** — We have our users read and acknowledge our corporate data security policy, we have them take required training, and then we trust that they do the right thing.

**Policy, training and technology** — We have our users read and acknowledge our corporate data security policy, we have them take required training, and we also use data discovery technology to regularly scan our networks and devices to verify that our users do the right thing and to ensure that we are not exposed to unnecessary risk.

Enterprise Search helps your security and compliance administrators detect confidential information in unauthorized locations while also helping your users eliminate information silos and find the information they need, regardless of where it resides.



## SECURITY AND COMPLIANCE CHECK

Being able to discover data across the organization is a critical component of security and compliance programs. Confidential Information Discovery solution from Hyland helps identify sensitive information like Social Security numbers and financial information stored in unauthorized or under-protected locations.



## SEARCH GOLD STANDARD

*Provide the ability to quickly find very specific information from information stored in multiple locations.*



# RETENTION AND RECORDS MANAGEMENT

Automate secure retention and destruction of documents and records:

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

Meet regulatory and industry requirements for retention, lower costs associated with storing and protecting documents' past retention, and automate time-intensive manual retention management processes.

## What types of retention requirements exist in your organization?

*e.g., employee files, contracts*

## How do you currently manage these requirements?

Manually

Separately in  
each department

Centrally

## Are you required to prove compliance with retention requirements?

How do you do that?



## SECURITY AND COMPLIANCE CHECK

Being able to prove compliant retention and disposition of protected information is a key requirement of new privacy and security regulations like GDPR.



## ADDING MARKET EXPERTISE

Want to take retention management to the next level? Consider adding our Governance Rules as a Service solution, developed jointly with Iron Mountain®, to automate and simplify knowing, meeting and proving compliance with retention and privacy regulations.



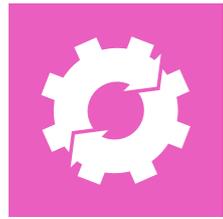
## RETENTION AND RECORDS GOLD STANDARD

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

# PLATFORM CONSIDERATIONS

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# INTEGRATION CONSIDERATIONS

## System integration is the quickest way to increase the value of your solution.

Your users likely spend most of their days working in multiple applications. The information and processes managed by your Hyland solution almost always relate directly to data, tasks and activities within those other systems. Integrating your Hyland solution with these applications can not only provide significant improvements in productivity but also reduce errors and improve data security and compliance.

Observe how your users are interacting with their various applications. Do you see any of these things happening?

**Switching applications:** Users frequently leave the applications and screens they are working in and switch over to the Hyland solution to perform related tasks, then switch back to their core application.

**Multistep uploads:** Users perform multiple steps when simply trying to upload documents into the Hyland solution (e.g., Office documents, emails, attachments, etc.).

**Duplicate data entry:** Users enter the same data into multiple systems (e.g. your Hyland solution and your ERP) or transpose data from one system to another.

**Data out of sync:** Data gets out of sync between your Hyland solution and your other applications, causing delays in your processes. Users must wait for information to be updated or manually verify and update information prior to taking action.

Integrating your Hyland solution with your other applications can help you address these and other issues. Hyland offers many integration options, from pre-built connectors to our APIs. Consider how some of the options listed on the right can enhance your business.

## WHICH INTEGRATION OPTION IS RIGHT FOR YOU?

### Pre-built connectors

Hyland offers many purpose-built integrations that help connect your solution to common productivity tools and enterprise applications. Pre-built connectors (if available for your application) offer the fastest implementation and full support.

### Web services and integration servers

Our integration server ensures an instantaneous, guaranteed exchange of data between your Hyland solution and core systems without requiring programming to an API or relying on error-prone flat-file data exchanges. Additionally, our published web services can provide an easy way for applications to access data from your Hyland solution.

### Screen-level integration

Some of our solutions also allow you to integrate with your existing applications without custom coding. Screen-level integration allows you to automate data operations between the data fields and controls of application windows open on the screen.

### API integration

Our APIs give you the flexibility to create your own integrations with Hyland solutions. APIs are available for many Hyland products and support industry-standard programming languages and protocols.



# PLANNING AHEAD FOR SECURITY AND COMPLIANCE

## Information security, privacy and regulatory compliance should not be an afterthought.

Information collected, processed and managed by your organization is increasingly at risk. Not only does your organization have to protect an ever-growing volume and diversity of data and systems, your team also faces increased sophistication and persistence of threats, a growing multitude of vulnerabilities to manage and increased attention from regulators.

Observe how your users are interacting with sensitive data. Do you see any of these things happening?

**Sensitive data stored in unprotected locations:** Sensitive information (personal, financial, healthcare, confidential, etc.) ends up in unprotected email attachments, public shared drives, personal devices, printed or shared with partners.

**Unnecessary exposure:** Users can see confidential information that is not essential to their tasks.

**Privilege creep:** Users still have access to sensitive data from their prior role, even though they have moved to another role or left the company.

**Lack of retention policies:** Data is stored indefinitely, without clearly defined and automated retention and destruction policies.

Considering your organization's data security and compliance requirements are key aspects of designing and configuring your Hyland solution. Many security and compliance risks can be addressed with properly implemented processes and features. Consider some of the common areas for improvement listed on the right.

## KEY THINGS TO CONSIDER

### Role-based user group policies

Control who can access what data by creating security groups based on user roles. This will simplify the task of managing permissions and help your organization stay compliant.

### Data discovery

When sensitive information ends up in unintended places like file shares, email attachments and cloud storage, it creates significant security and compliance risks. Consider conducting an enterprise-wide information discovery audit to help find and secure sensitive data and use an enterprise search tool to help proactively monitor for new data.

### Encryption

Sometimes, a data breach can't be avoided, no matter how diligent you are. Once your data is leaked, whether maliciously or accidentally, wouldn't it be nice if it were still protected and rendered unusable? That's what data encryption does — it adds an extra layer of protection to your data at rest, in transit or in use, making it unusable to attackers in case of a breach.

### Redundancy and disaster recovery

Losing access to your data, whether due to a natural disaster or an attack, can have dire effects for your organization. Using redundant or cloud-based deployment configurations can support business continuity and disaster recovery programs, and reduce or mitigate the impact of not only natural disasters but also ransomware and DDoS attacks.



# IS A HOSTED SOLUTION RIGHT FOR YOU?

**Depending on your business needs, you may choose to deploy some or all of your solutions in the Hyland Cloud.**

If you are like most other organizations, you are already using a mix of cloud and on-premises applications. Over the last decade, cloud has really come of age, becoming a viable and often compelling option for organizations considering where to deploy their next enterprise solution.

Think about the conversations you are having with your IT and business teams when planning infrastructure and resources. Do any of these topics come up?

**Business continuity and disaster recovery:** You have to meet aggressive recovery time objectives (RTO) and recovery point objectives (RPO) to ensure business continuity after a disaster or outage.

**New data privacy and security regulations:** Some regions, countries or states have unique requirements for how and where data is stored and accessed.

**Limited IT resources:** Allocating staff to deploy a new solution and manage its hardware and software platforms, performance, security and audits would put a strain on the available resources.

**Control over data, access and capacity:** It is important that your organization retains control over the data and has the ability to easily scale capacity to meet changing business needs.

Deciding where and how to deploy your Hyland solution is an important consideration that can provide real business benefits. The right fit is everything, and your solution provider can help you decide if the Hyland Cloud is right for your solution and ensure that it works optimally with your other applications and data, whether they are located on-premises or in the cloud.

## KEY THINGS TO CONSIDER

### Availability and reliability

Having your core data and applications managed in off-site, privately managed data centers can enable business continuity in case of an outage, a natural disaster or cyber attack. Hyland Cloud customers have enjoyed 99.99 percent availability of data, thanks to aggressive data redundancy and backup protocols.

### Location requirements

Many new data privacy and security regulations require that data be stored in specified countries or regions. Cloud deployments enable data to be stored in-region and can also provide faster data access by utilizing the closest data centers. Hyland Cloud leverages nine data centers on four continents, meeting the requirements of more than 26 countries.

### Scalability

Storage and computing power requirements can vary depending on the organization's size, or even seasonally in some industries. A Hyland Cloud deployment makes it easy to accommodate evolving business needs without requiring you to change your in-house technology infrastructure.

### Data security

Data stored in the cloud benefits from advanced data protection and physical datacenter security. Hyland Cloud encrypts data while in use, in transit and at rest, and never commingles your data with that of other organizations. Hyland's Global Cloud Services team manages the data centers around the globe to provide a reliable and secure environment.

# Bringing it all back

Now that you have re-evaluated your Hyland solution in this workbook, it has likely sparked some ideas and helped you identify several areas for improvement.

## Note your top priorities here:



CAPTURE



CUSTOMER COMMUNICATIONS MANAGEMENT



REPORTING AND ANALYTICS



CONTENT MANAGEMENT



COLLABORATION



SEARCH



PROCESS AUTOMATION



CASE MANAGEMENT



RETENTION AND RECORDS MANAGEMENT

Need more information?  
visit [HYLAND COMMUNITY >](#)

## What do you do next?

To get more information on the specific functionality available to you in each platform capability, go to the Content Services section on Community and filter by the capabilities in which you see potential. When you're ready to get started, contact your solution provider to guide you through the process.

## Solution provider contact:

# Hyland®

Learn more at [Community.Hyland.com](https://Community.Hyland.com)

