



WORKBOOK

Optimize capture, information access and workflow

Hyland®

HYLAND / PUTS YOUR WORLD OF INFORMATION IN YOUR HANDS

Develop a solution, drive efficiency and create great constituent experiences

Arranged into six categories, this workbook is carefully designed to encompass the ideal elements of enterprise content management (ECM) and content services solutions, regardless of department. These questions help you think about your current systems, processes and challenges and will help you select departments and solutions that can have the best impact on your agency.



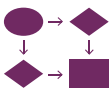
Capture

Capture all critical content – paper, electronic and data – from any location. Minimal data entry is required because your documents are automatically classified and indexed.



Integrate

Content should integrate seamlessly with core applications – like your ERP, GIS, MMS – without requiring custom code. Integrated content is instantly available directly from these applications. The systems can also synchronize data in real time behind the scenes.



Manage

Better manage your data, documents and processes to allow them to flow easily throughout your organization, minimizing process delays, automating repetitive tasks and equipping users to make better decisions to drive work forward.



Measure

Monitor and report on the information and activities within your content system. Identify and eliminate bottlenecks and prepare for audits with immediate insight into what information you have and what information you need – without involving IT administrators.



Access

Everyone who needs to access content and processes can easily do so from anywhere. The user experience is personalized, integrated with core applications, available from mobile devices and extended to authorized users outside of your organization.



Store

Securely store and protect content from disasters throughout its entire lifecycle with built-in data redundancy, encryption and tools to automatically destroy content when it expires in accordance with legal retention requirements.

Now ask yourself, “Which of these capabilities does my organization need?” Use this workbook to refine and identify challenges you face and the capabilities you need to address them. Each section presents a series of deep-dive questions to help you reflect on new and exciting ways to drive efficiency, reduce costs and improve customer experience.



CAPTURE

No matter where your documents are located or what format they come in, an ECM or content services platform captures them right at the source and organizes them – and the data they contain – into a single system with minimal human interaction.

Paper.....

List content you would like to digitize, protect or eliminate.

An ECM or content services solution can capture these documents right at the point of origination.

Where could you eliminate the cost of printing, storing and/or shipping?

Electronic.....

Check the electronic documents and data types you reference that aren't currently in your solution:

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

Where is this content located?

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

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

Data.....

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

Where does this data originate?

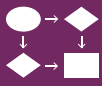
Paper invoice

Which system(s) do people manually type data into?

Manually indexed in ECM and typed into ERP

ECM and content services platform solutions can ingest data directly from data streams like XML and EDI. It can also capture data off of electronic forms or imported documents. Additionally, these documents can be automatically classified for automated data extraction and validation. You can then send the extracted data to other back-end systems and use it to automate the indexing of the documents.

How will your organization benefit from electronic data capture?




MANAGE

Effectively manage data, documents and processes on one platform. Automate repetitive process steps, get more out of your critical content and support knowledge-driven work with a complete view of information.

Manage Processes

Structured processes that can be mapped on a flowchart – those with predictable steps and outcomes – can be optimized and improved with ECM or a content services platform. Leveraging Workflow and other tools, ECM or a content services platform automates repetitive tasks while delivering meaningful exceptions to the right people at the right time.

 List your structured processes that could benefit from ECM or a content services platform. Then, to the right of each, check the key capabilities that you could use to improve each process.


	Verify existence and accuracy of related documents	Route decisions, documents and exceptions	Automate repetitive tasks and rules-based decisions	Send automatic notifications and reminders	Load-balance work across teams	Manage complex approval processes
<i>AP invoice processing</i>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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_____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

 Once a business decision is made, how do you communicate the decision and compose the documentation?
(e.g., letters, statements, etc.)

- Manually
- Automatically


Manage Data

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?
Check all that apply.

- Excessive use of spreadsheets
- Lack of collaboration
- Struggle to delegate tasks
- Disconnected documents, data and folders
- Inability to accurately report on process status
- Multiple and/or conflicted data sources between departments
- Difficulty tracking related documents
- Large amount of dates and expirations to manage

The right ECM or content services solution can address these challenges and reduce application sprawl.

 **What tools are you using to manage key business data and supporting processes?**

Circle all that apply.



Lotus Notes®



Access® databases



Excel® spreadsheets



Legacy departmental applications




Siloed content repository

These tools may not drive enough efficiency for your organization, and in many cases they may contribute to staff work load. With content stored in multiple siloes, staff must hunt through them to find the specific document or information required.

 **QUIZ: What are some of the challenges you face using these tools?**

Circle all that apply. Answer found at the bottom of the page.


- a. Provide workers with a 360-degree view of all the information they need to support a specific customer, case or project
- b. Natively manage and connect data, documents, notes and correspondence
- c. Schedule events, delegate tasks, log activities and collaborate with other individuals
- d. Seamlessly integrate with existing information systems
- e. Add to application sprawl by requiring many custom-developed and off-the-shelf solutions

 **Where do you need new solutions or face replacing existing applications?**

Check all that apply.

- | | | |
|---|---|--|
| <input type="checkbox"/> Human services | <input type="checkbox"/> Accounts payable | <input type="checkbox"/> Grants management |
| <input type="checkbox"/> Plan review | <input type="checkbox"/> Human resources | <input type="checkbox"/> Public records |
| <input type="checkbox"/> Agenda and Minutes | | |

These are just some of the areas where the right solution can add value to every organization.

 **Note any other areas you could use new solutions.**

(Hint: Think about solutions unique to your industry)

e.g., fraud investigation, claims processing, underwriting, customer service

Manage Documents.....

When your users work with an ECM or content services solutions, they work electronically with all the critical content they need, regardless of format. Empower them to easily search for documents required to make decisions while leveraging digital folders and file cabinets to keep content organized.

 **Which of these document management capabilities would support your users?**

Circle all that apply.



Organize with folders and file cabinets



Collaborate and add notes



Manage revisions and versions



Auto-generate and distribute correspondence



Sign electronically

The true beauty of the platform is that it empowers you to create applications that combine **data, documents** and **processes** on-premises or in the cloud. This supports areas like enterprise content management, document management, case management, smart process applications and business process management (BPM) – all while addressing your specific needs and information requirements.

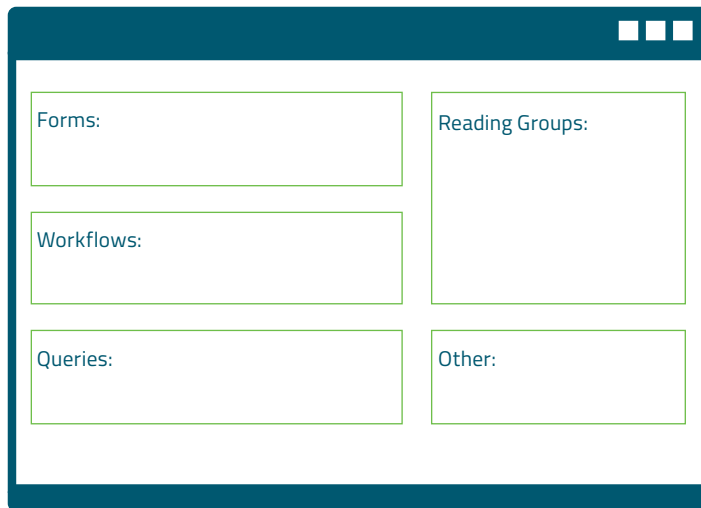
ECM and content services solutions make your critical content available to the people who need it, wherever they are, from almost any device or application. This enables your users to work the way they are most comfortable – whether inside or outside the four walls of your organization.

In the office

User Experience

ECM and content services solutions can give your users the ability to customize the home page they see first when they launch their solution.

Personalize your page



What kinds of solution components would your users have on their home page?

Common forms used

Workflows (*business process*) with their work

Queries (*saved searches*)

Reading groups (*policies and procedures*)

Access to data solutions

Integration

The right solutions can connect to other business applications, serving up content and allowing interaction with business processes from their most important solutions.

What applications do your users work with in conjunction with documents and files to complete their work?

List your employees:

HR Recruiter


List the applications they use:

Outlook

_____	→	_____
_____	→	_____
_____	→	_____
_____	→	_____
_____	→	_____

The Integrate section on page 8 will help you understand the options available to integrate with these applications.

Outside the Office

 **How do your users access information?**
Circle all that apply.



Smartphone



Desktop




Windows® Tablet



iPad®




Laptop

 **Who in your organization could benefit the most from access to content and processes on a mobile device?**

<i>Who</i>	→	<i>Device</i>
<i>Executive</i>	→	<i>iPad</i>
_____	→	_____
_____	→	_____


Do your field workers have the ability to retrieve, create and update documents, complete forms and upload photos while offline? Will the changes then automatically sync back once reconnected to eliminate the time spent manually entering data once back in the office?

 **Offline access means your processes don't have to wait. What could your users drive forward faster if they could continue them offline?**

<i>Who</i>	→	<i>Process</i>
<i>HR generalist</i>	→	<i>Off-site campus recruiting</i>
_____	→	_____
_____	→	_____

Extended Access

Do you need extended access capability? This enables people outside your organization to securely access your content. That could include other agencies, constituents, auditors, etc.

 Below are a few options for extending access beyond the walls of your organization. Note here who could benefit (e.g., customers, constituents, other agencies, etc.) and what they would access.



External web access
(through your online portal)

Who
Vendors

What
Provide invoices



Direct links to documents in an email

Who
Customers

What
Warranty requests


Signatures


Integrate with DocuSign® and CIC Ceremony™ Server to enable you to electronically obtain signatures from people outside your organization in the cloud. Which processes require external users to sign documents?


INTEGRATE


It's likely that many of your users spend most of their day working in a number of business applications. However, the information and processes managed by ECM and content services solutions almost always relate directly to data, tasks and activities within those other systems. Integrating content with the applications your users use every day provides significant improvements in productivity.

Observe how your users interact 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 to perform related tasks, then switch back to their core application. These related tasks could include searching for related information, performing steps in a workflow, filling in forms and/or saving documents outside of core systems to email or edit.
- 

Multi-step uploads: Users perform multiple steps when simply trying to upload documents into their systems (e.g., Office documents, emails, attachments, etc). They save documents to a folder, launch the required system, drag and drop a folder into it and then index the document.
- 

Duplicate data entry: Users enter the same data into multiple systems or transpose data from one system to another.
- 

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

Integration Options.....

ECM and content services solutions offer multiple integration approaches, including purpose-built integrations with several key applications, integration tools to integrate with ANY application and APIs which empowers you to create your own integrations. Use this chart to consider these options:

	Install: Speed to implement based on amount of effort required	Upgrade: Integration method fully tested for each update/ upgrade version?	Maintain: Support provided to troubleshoot issues with performance or functionality
Purpose-built integrations	Fastest	Fully Tested	Full Support
Integration tools	Fast	Fully Tested	Full Support
Custom code integrations with the API	Slowest	Partially Tested*	Partial Support*

*Hyland ensures the API toolkit functions as expected during each upgrade, and your first line of support will confirm that the API toolkit is functioning as expected. Please review the terms of your support contract for details.

START HERE

Is there a purpose-built integration for the application(s) you wish to integrate with?
(Check the Productivity Tools & Enterprise Applications lists on the left-hand side of the page.)

Yes

No

Productivity Tools

- MS Outlook®
- MS Office Business Applications
- MS SharePoint®
- Google Services
- IBM Lotus Notes®
- Novell GroupWise®



There is a purpose-built integration for you. These integrations are built directly into the application and will solve these issues:



Switching applications



Multi-step uploads

Enterprise Applications

- SAP™
- Lawson S3™
- Oracle PeopleSoft Enterprise™
- Oracle eBusiness Suite™
- AutoCAD®
- Accela Automation
- Esri ArcGIS™
- CourtView
- Azteca Cityworks®
- Other



There is a purpose-built integration for you. These integrations are built directly into the application and will solve these issues:



Switching applications



Duplicate data entry



Data out of sync

My application was not listed on this page. No problem! Let's pick the right integration tool for you.

Do you want to integrate without writing or maintaining custom code?

Yes

No

Pick the issues you want to solve:



Data out of sync



Duplicate data entry



Switching applications



You need a data-level integration

Using an enterprise integration server ensures an instantaneous, guaranteed exchange of data between your content and your core systems without requiring programming to an API or relying on error-prone flat-file data exchanges.

You need a screen-level integration


ECM or a content services solution may offer this type of integration with your existing applications and it uses no custom coding. It links documents, folders, forms, queries and more to fields on the screens of your applications with a few clicks.

You need to create your own

Look for a suite of APIs to give you the flexibility to create your own integrations. Programming interfaces for industry standard languages allow your developers to create custom integrations with familiar tools like .NET, COM, Java and Web Services.

Which integration method is right for your needs?
Note your ideas and/or questions to ask your solution provider.

Do you have the information you need to continually improve your processes and operations? What you can measure, you can improve. ECM and content services solutions can provide tools that give you visibility into almost everything that is happening within the system.

 **Match the different types of reports you need.**
Draw a line to connect each number to the proper letter. Answers found at the bottom of the page.



A.

Monitor



B.

Audit



C.

Report

- 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.
- 2.** Run historical reports without relying on IT. Access pre-configured reports that provide information to use for budgeting and resource planning. Information types include system usage and performance, licensing, processing times and bottlenecks and more.
- 3.** Gain real-time visibility into business processes and immediate, actionable information about the status of critical processes with tablet, SharePoint and web client options.

Monitor

Who would benefit from real-time visibility into processes?

Which processes?

How would they access this?

- Tablet
- SharePoint Site
- Web Client

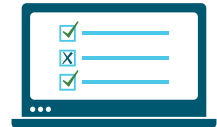


Audit


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

Why?

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



Report

 **List the business processes you would like to enable your users to report on and analyze.**
e.g., AP processing, application processing, inspections

 **List the areas you'd like insights into.** *e.g., customer services, process speed*

 **In order to prove the value of this solution to free up funds for future projects, what benchmarks would help you prove and track the ROI of the solution?**



Storing your important information in one centralized place grants you complete control over it. With ECM and content services solutions, your unique records management and retention requirements are now well within your grasp without adding significant or unnecessary expenses to the total cost of your solution. Ultimately, consolidating your content into one system eliminates the need to manage it across a variety of databases, systems and physical storage locations.


Destroy.....

Legal requirements dictate that your documents are deleted according to specific retention schedules.

Does your solution allow you to manage your content throughout its entire lifecycle?

Yes No

If you answered no, consider enhancing your system to ensure compliance and make implementing your retention plans as straightforward as possible.


 What types of retention requirements exist in your organization?


 What is your current method of managing these requirements?

Protect.....

Online redundancy is an inherent characteristic of ECM and content services solutions, ensuring that your content isn't vulnerable to catastrophic events.

 In the event of a catastrophe – such as a fire, power outage or natural disaster – what strategy do you currently use to ensure information is protected?

 For documents in your disk groups (file servers), have you implemented ECM and content services solutions copies? If not, why?

 For data in your database, have you implemented database backups, log shipping, mirroring or clustering? If not, why?

Secure.....


ECM and content services solutions is already a secure solution, designed to protect your data without the use of third-party software. However, if your industry standards require an additional layer of security, ECM and content services solutions may be tailored to accommodate your specific needs.

Safeguarding your data is also pertinent to remain in compliance with company, state and industry standards.

 Which compliance regulations impact how you store data?

Can you ensure that sensitive data stored within your database, such as SSNs and credit card numbers, is protected from database administrators and other unauthorized external parties?

Yes No

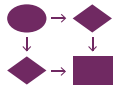
 Encryption at the disc-group level can protect against unauthorized access to your important files. What types of documents do you store that could benefit from this level of protection?

Do you require https encryption to protect your data as it's transmitted across the internet?

Yes No



Capture



Manage



Access



Integrate




Measure



Store

Bringing it all back

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

 Note your top priorities here:

What do you do now?

 Solution Provider Contact:

Name: _____

Email: _____

Telephone: _____

Learn more at OnBase.com/Government »



Process focus. Excellence.

