



PRIORITIZING INFORMATION:

***MAXIMIZING* its Value, *MINIMIZING* its Risks**

AN INFORMATION MANAGEMENT PLATFORM HELPS ORGANIZATIONS ACHIEVE GREATER PRODUCTIVITY AND IMPROVED AGILITY, WHILE ALSO MEETING SECURITY AND COMPLIANCE OBJECTIVES.

The quantity of information that businesses create, manage, and store today can seem overwhelming. Content exists in systems, applications, drives, and devices in multiple formats, and is used by a wide range of people both inside and outside the organization.

Most organizations have multiple information solutions — such as CRM, enterprise content management (ECM), and ERP applications — to manage and store content. Yet they don't speak to each other very well — or at all. Information workers often have to access multiple systems while completing a single business task. This lack of integration wastes users' time and creates complexity in addressing compliance and security requirements.

Unfortunately, many organizations accept this incongruity as an unavoidable side effect of owning a diverse range of best-of-breed enterprise systems and point solutions.

By focusing on how information is used, and making it accessible in the context of business processes, organizations maximize its value — increasing productivity, providing better customer experiences, and improving decision making. Being able to automatically streamline and manage content across sources onto a single platform also minimizes security and compliance risks. But to accomplish this requires a new breed of content management technologies.

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The challenges associated with content

Enterprises are awash with content that flows inside and outside the organization. Its sheer volume creates challenges from three different angles:

BREADTH:

Information exists in multiple applications, systems, and formats.

DEPTH:

It's embedded in files and includes metadata and annotations.

PEOPLE:

When shared inside or outside the organization, content can be sent in an unsecured fashion, or sensitive data can be inadvertently given to unauthorized persons, creating compliance concerns.

Compliance alone is a formidable challenge. Complexity reigns as organizations deal with continually evolving regulations, plus new ones such as the recent General Data Protection Regulation (GDPR). Add the constant threat of data breaches and it's a constant scramble to ensure information is properly protected and secured.

The pressure is on the IT team, who must manage all these challenges plus one more: ensuring content can be easily and quickly accessed by users, both inside and outside the network.

The role of information management technologies

Individual content management solutions have addressed many of these challenges, and traditionally go one of two ways. One approach focuses on content itself — for example, storing and managing it. Traditional ECM suites did this well. However, when organizations became more reliant on digital information and needed flexible technologies organization-wide, ECM's single repository model became impractical. Today, search/data discovery technologies fill the visibility gap, giving users the ability to discover and access content residing across various locations and departments.

The second approach focuses on content-enabled business processes, usually isolated to a single process in a single department (HR onboarding, AP invoice processing, etc.). This type of information management solution focuses on optimizing and streamlining the business process, which includes unique business rules for how information is shared, routed, processed, and stored. Such solutions can create significant business value but become difficult to manage as more of them pop up across the organization.

Neither the content- nor process-focused strategy is right or wrong. Each has advantages and drawbacks, and organizations typically adopt one or the other based on business need.

However, as the volume of information increases, enterprises are realizing the impact of breadth, depth, and people issues:

- Content is scattered across multiple applications, both on-premises and in the cloud;
- Information is found in many formats, including both structured and unstructured;
- And, despite best efforts, information may be shared inappropriately.

Most importantly, there's often little or no integration between information management technologies, core systems like CRM and ERP applications, and productivity and collaboration apps. That often forces users to open multiple apps to get the information they need. What's more, if business units have procured their own software-as-a-service (SaaS) apps, there's likely valuable content within them that is also not integrated.

So, despite considerable investment in varied technologies and solutions, it's a struggle to get the right content into the right hands at the right time, while also keeping that information secure and meeting compliance and regulatory requirements.

Information management: Maximizing the value of content

These challenges must be overcome to realize the full value of content as well as achieve critical business goals such as increasing productivity and improving agility in decision making and service delivery.

To do so, the focus of information management must change, marrying both content and process to emphasize how information is used. And it must be accomplished organization-wide, rather than at the department level. This requires a new breed of information management platforms, capable of managing not only content but also related processes, cases, and communications.

Unlike ECM suites of the past, today's information management platforms work with multiple repositories and provide rich integration with modern core systems and applications. A single information management platform can optimize content-enabled processes for multiple departments and unique business use cases, ensuring that the right content and capabilities are delivered to the right users and systems.

Get the right view

By automatically delivering content based on user roles and via the applications individuals use on a daily basis, organizations empower employees to more quickly make better decisions and speed service delivery — thus also improving the customer experience.

Imagine the value achieved in healthcare when a patient's full history is available at his primary care doctor's fingertips. One patient generates wide-ranging information, such as vital sign recordings, lab test results, prior illnesses, treatments, medications, specialist care reports, and family health records.

Integrating all of this information lets the healthcare provider offer a comprehensive health assessment — making the provider (and staff) more productive, speeding care delivery, and increasing the quality of care. At the same time, integrated content management leads to improved patient experience and satisfaction.



Automate processes to reduce complexity

Many internal business processes at organizations have evolved organically, often around older technologies and outdated business requirements. A modern information management platform is robust and flexible enough to optimize and automate information flows within the organization to meet current business imperatives.

Automating content workflows between users and systems, such as automatically matching and linking a scanned invoice to a purchase order in an ERP system or routing a document for approvals, can dramatically speed up business cycles, reduce errors, and allow staff to focus on higher-value activities.

Enable sharing and collaboration

Traditional ECM systems were not designed to enable sharing and collaboration, but modern information management platforms are. By integrating them with productivity, sharing, and collaboration applications (or natively providing these capabilities), they simplify, automate, and secure business processes that involve sending information inside and outside the organization.

For example, an insurance provider can leverage an information management platform with integrated Customer Communications Management (CCM) capabilities to automate the process for generating and sending out customized communications to policyholders.

Similarly, an organization can leverage an information management platform with integrated Enterprise File Sync and Share (EFSS) capabilities to securely share sensitive contracts with partners or suppliers.

Minimizing security and compliance risks

While maximizing the value of information, CIOs and IT leaders must also mitigate risks.

Maintaining numerous point solutions and content management systems makes information security, governance, and compliance a near-impossible task. Integrating information management technologies with a single information management platform can help. There are the obvious benefits like centrally managed user access privileges, retention policies, and legal holds. But there are also unique, specialized tools and capabilities that an information management platform brings to make security and compliance more manageable.

For example, data discovery capabilities can help address breadth and depth issues. The technology can automatically search for keywords, phrases, and patterns in numerous repositories and hundreds of file formats to identify unnecessary or outdated data. By streamlining the e-discovery process across multiple applications, organizations can better adhere to data retention and compliance regulations. In addition, IT can configure rules to find and remove sensitive data from unsecured locations, automating the task of monitoring numerous file shares, sites, and repositories for sensitive information.

Consider the example of one government agency, which uses a discovery solution to proactively scan workstations for sensitive data protected by HIPAA and other regulations. The agency identifies clusters of synonyms and related terms — such as date of birth, birth date, DOB — combined with pattern matching to find text that looks like social security numbers. The solution automatically finds key areas of concern and creates a framework for protecting or purging sensitive data.

THE BOTTOM LINE: The solution has protected the agency from potential compliance violations by mitigating 95% of risk.

In addition to minimizing compliance risks, the right information management technology addresses safe content sharing. Both inside and outside the organization, employees, partners, and vendors must collaborate, share, and access information. Yet they may inadvertently attach sensitive documents in emails or put it on shared drives.

Technology such as EFSS enables the secure sharing of all types of content from multiple devices — both internally and externally. The technology can be integrated with business apps for ease of communications. Also, IT can establish specific policies, permissions, and encryption, while automating auditing and reporting for compliance purposes.

To put it in perspective, a mortgage lender and financial services provider uses a cloud-based EFSS solution to compliantly share sensitive loan documents externally. When documents enter the system, the technology disseminates pertinent information such as credit union number or contract level to populate protected folders for external sharing. In addition, modifications or actions taken on a loan trigger auto alerts to make sure employees take appropriate action to secure the data.

THE BOTTOM LINE: The solution has replaced time-consuming file-sharing options like encrypted thumb drives, saving both time and money while ensuring compliance standards are met.

A modern information management platform provides capabilities and APIs that help automate, consolidate, or integrate many of the content-enabled processes within the organization. While integration and automation have clear efficiency and productivity benefits, they also have security and compliance advantages. Automating manual processes reduces the number of “hops” and “touches” between various humans and systems, which in turn reduces security and compliance risk from intentional or unintentional data exposure.

Leveraging an information management platform to reduce or consolidate the disparate information management systems and apps also reduces security risk due to system vulnerabilities.

Putting it all together

There’s a balance to strike between enablement and protection. A platform that integrates all forms of information management technologies puts the right content into users’ hands at the right time, while ensuring it is secure and compliant.

By tying together tools like content management, data discovery, EFSS, and case management, and then integrating them with core business systems and productivity apps, an information management platform:

- Provides a unified view of information, whether it’s customer or case data, from multiple sources or repositories
- Provides the ability to customize user interfaces based on role or function
- Consolidates IT sprawl
- Automates content workflow for greater predictability and to speed business cycles
- Enables highly repetitive, automated processes for data retention and compliance auditing

A single information management platform helps organizations fully address the breadth, depth, and people issues surrounding information today.

About Hyland

Hyland provides solutions that manage information, simplify processes, and connect systems. The company helps more than 19,000 customers handle their most critical content and processes to empower efficiency and agility. Products include:

- **OnBase:** a single enterprise information platform for managing content, processes, and cases to unite critical systems and information.
- **ShareBase:** an enterprise solution that provides secure, cloud-based sharing (EFSS) of information.
- **Enterprise Search:** a content discovery and output technology that makes it easy to pinpoint information, anywhere it exists — repositories, email, intranets, extranets, websites, databases, and more.

For more information visit www.Hyland.com/security-compliance.