

Five Questions to Ask When Integrating Content with Business Processes

By Bill Priemer, COO, Hyland Software, Inc.

There was a time when enterprise content management (ECM) solutions were simply focused on getting control of the avalanche of physical and electronic documents and reports. A centralized solution for capturing, managing and distributing diverse documents will always be preferable to paper-based systems or disconnected silos of information and makes an excellent foundation for process improvement. However, technology buyers should ask solution providers to take content to the next level by combining knowledge of their industry and integration with core business applications to create revenue opportunities and reduce the burden of governance, risk and compliance initiatives.

Content-enabling an application specific to your business makes it possible to retrieve documents and generate content-driven business process automation without ever leaving the line-of-business application users work in daily. For instance, a content-enabled accounting system can not only post payments and record transactions, but it can also display an invoice or generate an automated workflow to resolve exceptions with a mouse click or function key. In addition to freeing employees for more strategic tasks, automation reduces human error, imposes process integrity and creates an audit trail, all of which can be used to verify that accounting is in alignment with other business units to support compliance requirements such as Sarbanes-Oxley.

The Five Key Questions

Solution providers with the technology and experience to create the solution that will deliver results should be able to answer the following questions:

1. What can I integrate with? Most organizations run a number of applications to manage various aspects of a business or even a single business process, whether those systems are tier-one enterprise resource planning (ERP) applications or industry-specific applications. An ECM vendor should offer dedicated integrations,

non-programmatic integration tools, application programming interfaces and Web services capabilities to address every integration scenario. The ECM application should integrate easily with virtually all Windows, host, Java or text-based applications to promote the best use of documents and data.

2. What if I want to change something?

The solution used to integrate the content with line-of-business applications should be flexible enough to adapt to unforeseen challenges with tools such as point-and-click configuration and integration technology native to the ECM application. Custom coding increases costs and locks companies into rigid solutions that don't evolve with changing business needs, such as mergers and acquisitions. With easily configurable ECM software, adding new functionality may even be accomplished with in-house IT staff. It's also important to know that if an existing line-of-business application is upgraded or abandoned altogether, the integration technology can be adapted to the new environment quickly. And users should always have the option of being able to easily and immediately retrieve documents directly from the ECM application when desired, whether through a standard search dialog, a portal-like view of documents and tasks or multi-level foldering.

3. Do you have other customers in my industry, and how do you support them?

If a customer has to explain the business drivers, they have probably chosen the wrong vendor. In fact, the vendor should have specialized tools and functionality specifically designed for those business needs, support staff dedicated to that industry and existing customers willing to serve as references or host site visits. Additionally, there should be mechanisms for educating users to realize additional operational efficiencies and an open line of communication for requesting enhancements that benefit targeted business processes.

4. Can everyone in the enterprise benefit? The utopian goal of integrating applications with ECM technology is to improve performance, communication and

collaboration across all business units, as well as with customers and partners. While an enterprisewide solution that touches every application and every department may not be economically feasible from the outset, it certainly should be a viable goal. Not only will a solution that supports incremental enhancements cost effectively boost overall efficiency at a lower total cost of ownership, it also consolidates documentation and training needed to support compliance initiatives and reduce the time and complexity of audits.

5. How disruptive will this be? Once common, drawn-out implementation periods and stalled technology projects are unacceptable. Native application integration and simplified configuration tools make it possible to create sophisticated solutions and still meet very aggressive rollout schedules and tight budget requirements. By allowing content management and automated workflow to seem like an enhancement to the existing system, seamless integration with line-of-business applications virtually eliminates the need for end-user training and change management.

Measuring Success

How content adds value to your business will vary according to the industry and the application, but it has measurable results. Reducing cycle times, for instance, may mean being able to recognize revenue sooner, increasing customer/partner satisfaction, making an offer to the best candidates before your competitor does or collecting more early pay discounts. Labor previously designated for tedious manual processes can be reallocated to focus on new revenue opportunities. Governance, risk and compliance initiatives also benefit from the process automation, audit trails and security features of an ECM solution. If you're still viewing ECM as an archive technology, it might be time to change your perspective. ■

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Hyland Software develops OnBase, a suite of enterprise content management software that combines integrated document management, workflow and records management capabilities in a single application. OnBase is used by businesses and government agencies to automate business processes, improve organizational efficiency and address the need for regulatory compliance through the management, control and sharing of digital content with employees, business partners, customers and other constituencies. Visit www.onbase.com for more information.