PRODUCT PASSPORT

HYARCHIS DOCUMENT MANAGEMENT

HYARCHIS

CONTENT & ONLINE COLLABORATION SOLUTIONS

Hyarchis is your partner for:

Digital Business

Online Collaboration

Customer Communication

Document Composition

Document Management

Case Management

Email Management

Who is Hyarchis?

Hyarchis is a Dutch manufacturer and supplier of document management and document composition software. Hyarchis digitises and structures document flows, optimises business processes and provides an online collaboration environment for companies and the people they do business with.

Hyarchis believes in shared success. Investing in relationships together is the key to effective software implementations. Hyarchis remains close to the customer and always takes responsibility, everywhere and at all times. Flawless partnership – that's the strength of Hyarchis.

What does this Product Passport cover?
This document describes the key functional and technical features of Hyarchis Document Management (HDM). Reading this document will give you an initial idea of what the software can do, how it fits in your IT landscape and how it can meet your specific business needs.

The market is full of document management software solutions. However, in this document you can read about what makes HDM especially user-friendly, and how it has been developed by a Dutch software company. You can also read about our attractive pricing models.

> " For an organisation that decides to go digital, a reliable and user-friendly document management system is essential.
>
> *Erwin van den Broek, Operations & Products Manager at Hyarchis* "

Want to see for yourself what Hyarchis can do for you?
Please **contact** Hyarchis for more information.

What is HDM?

HDM provides you with the tools to manage your digital documents and cases within your business processes easily, transparently and efficiently. From spreadsheets to audio and video files, all content is automatically saved in the correct format in a manageable archive. Whether you're at the office, on the road or visiting a customer, you can always access the documents through a user-friendly desktop or iPad application, or using your browser. This means you have the document you need when you need it, no matter where you are.

The Hyarchis document management system works with authorisation rights, so the documents can only be viewed by the employees who have authorised access to them. Any changes an employee makes to a document will be saved, and a log is kept of who edited the document and when. Thanks to this, you can rest assured that the document being edited is the latest version (no more accidentally working on an older version), and you know who worked on it previously if you have any questions.

HDM is more than just a handy storage system for your documents though. In modern business processes with a high level of automation, finding documents fast is just one of the necessities. Missing information or documents can slow down your business processes enormously. So, HDM goes further than just helping to find stored documents: it actually alerts you when documents are missing.

Integrating HDM with other software applications and systems is no problem; Hyarchis views this process as one of the key functionalities of the document management system. It goes without saying that HDM integrates seamlessly with Hyarchis Document Composition (HDC), and a wide range of modern solutions to connect HDM with your systems is available.

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> *Hugo Ouwehand, Mortgages Director at Syntrus Achmea Real Estate & Finance: "HDM works very nicely; our employees give it an 8+ out of 10. This appraisal is partly based on the time we save when using Hyarchis' document management system. And it makes cases and documents easier to find too. As I like to say, we've gone from 'searching' to 'finding'; we now have the information we need right when we need it. Our service has improved as a result."*
> "

Functional specifications

Seamless integration with Microsoft Office (365)

HDM works seamlessly with Microsoft Office products. You can save documents to a case directly from Word, Excel, PowerPoint and Outlook and automatically import emails from Exchange Server to HDM.

Seamless integration with MFP scanners (e.g. Kyocera)

With a connection to an MFP with scanner, scanned documents can be saved directly to the right case; simply indicate on the MFP which case the scanned document should be saved to.

Central storage

HDM provides a central, safe storage location for all your documents. From HDM, access to documents can be provided to any location or process that needs access to these, both inside and outside the walls of your organisation.
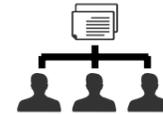
Audit trail

The full check-out/check-in and revision history of documents and cases is logged. This provides a permanent record (audit trail), and all employees can see who has viewed and/or edited a particular document and when. Not only does this show who last modified the document, it also allows you to see whether the document has actually been viewed by everyone who needs to see it.

Advanced search function

HDM offers you an advanced search function so that, in addition to searching for a document by title, you can search by content too.

Configurable retention period

Retention periods for documents have been set by law. Once you define retention periods in HDM, this is all handled automatically and you no longer have to worry about complying with legal requirements. This option can also save you money: you may, for example, configure the settings to have documents transferred from your (accessible but expensive) data storage space to a larger and cheaper long-term storage archive.

The latest version of the document – guaranteed

Mistakes often arise when employees send various versions of a document back and forth: an employee might get the wrong version and changes may be lost. With HDM, this confusion can be avoided: by sending a link to the stored document instead of the document itself, everyone can be sure of having the latest version.

Records Management (ERM)

The extensive authorisation options allow you to set exactly which users can access which documents and cases. Authorisations can be configured fully dynamically so that the documents will only be accessible to the right people and at the right time.

Classification

Classifying documents from external sources is fully automated in HDM, making time-consuming, expensive manual handling a thing of the past. What's more, HDM's automatic document classification can also be used to retrieve lost data within a dataset, or to verify existing classification within a document structure.

Technical specifications (hardware)

■ **Hyarchis supports**

EMC Centera and Hitachi HCAP hardware
Microsoft SQL database server versions 2008/(/R2), 2012, 2014, 2016 – all service packs
Microsoft server and SQL server clustering and failover technologies
32 and 64-bit architecture

■ **Minimum HDM database server requirements**

Installation on the same server as the application server
Dual-core processor
4GB memory
100GB hard disk
100Mbit network card
Windows Server OS (2012 or later)
Microsoft SQL Server (2012 or later)

■ **Minimum HDM application server requirements**

Dual-core processor
4GB memory
10GB hard disk
100Mbit network card
Windows Server OS (2012 or later)
Microsoft Internet Information Server (for WebClient and REST Web API)
Microsoft .NET Framework 4.5.2 or later

■ **File storage**

Hyarchis supports Windows filestore-based
storage systems like NAS, SAN and local storage.
EMC Centera
Hitachi HCAP hardware

■ **Minimum HDM desktop client requirements**

Standard Windows PC, Windows 7 or later
MS Office 2010 or later, or Office 365 (for Office integration)
Microsoft .NET Framework 4.5.2 or later

■ **Minimum HDM web client requirements**

Up-to-date browser on tablet, laptop or PC (Internet Explorer, Firefox,
Chrome, Safari, Edge)

Technical specifications (software)

■ **HDM application server**

Microsoft Windows 2008(/R2), 2012(/R2), 2014 or 2016
Microsoft .NET Framework 4.5.2 with patches (or later)
Microsoft Internet Information Server (for HTML WebClient, Silverlight Client and WebService)
IIS7, IIS8 or IIS10 with "IIS 6 compatibility pack"
SSL is supported for website and web service

■ **HDM database server**

Microsoft Windows 2008(/R2), 2012(/R2), 2014 or 2016
Database system
Microsoft SQL Server 2008(/R2) – all service packs
Microsoft SQL Server 2012 – all service packs
Microsoft SQL Server 2014 – all service packs
Microsoft SQL Server 2016 – all service packs

■ **HDM clients**

Microsoft Windows 7, Windows 8 or Windows 10
Microsoft Office 2010, 2013 or 2016
Microsoft .NET Framework 4.5.2 with patches (or later)
Internet Explorer version 8, IE9 or higher recommended for the HTML version of the Hyarchis WebClient.
The Hyarchis Silverlight WebClient runs on IE, Firefox and Safari.
HDM clients operate on a Citrix infrastructure.

HDM is a fully Microsoft .NET-based product built around a three-tier (client-server-database) architecture.
HDM servers, databases and clients run in a VMWare infrastructure environment.

Product specifications

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Solution using three-tier architecture (client-server-data)	Client systems: .NET desktop application for Windows systems and web application for desktop, laptop and tablet	Standard integration with Hyarchis Document Composition and the Digital Business Platform
Seamless integration in your process	Central storage of data and settings	Flexible configuration allowing for fast customisation
		Access to support

Links with other systems
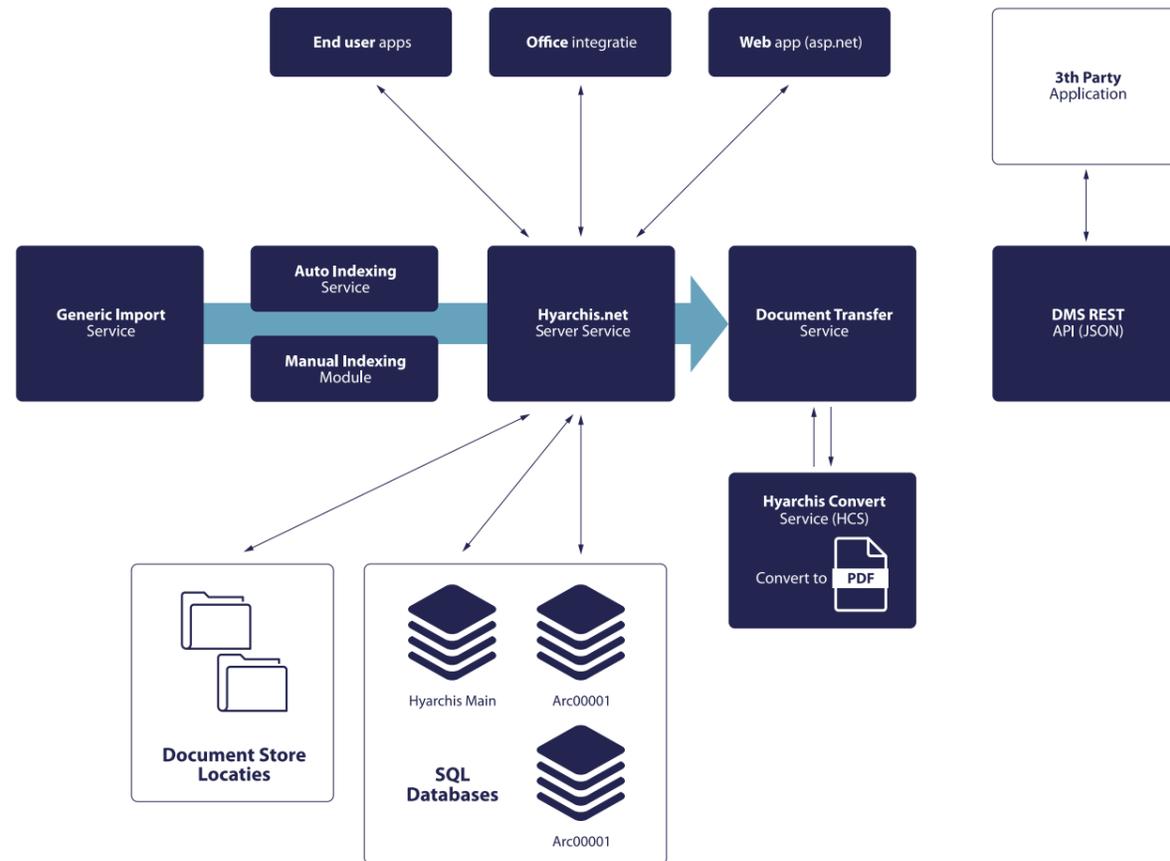
Migrating data from other document management systems

Hyarchis specialises in integrating HDM with other software applications and systems. Using the REST API (JSON), for example, cases can easily be accessed through a web portal. With SSO (single sign-on) and a link to a Hyarchis Authentication Service, you can create seamless integration that meets high security requirements.

> " *Hugo Ouwehand, Mortgages Director at Syntrus Achmea Real Estate & Finance: "What really struck me on the day that the system went live was all the happy faces. Everything worked, it was fast, there was no downtime. It also helped that the user group was involved with the Hyarchis team right from the start. That soothed any concerns within the department."* "

What does the process look like once you've bought the software?

Step 1: Surveying the situation

First of all, stock is taken of the current and future needs in the area of document management. This process involves all project stakeholders, both internal and external (like a supplier for example).

Step 2: Preparing the organisation

Once the survey is complete, it's important to prepare the organisation for the change. Projects run more smoothly and have a better chance of success when, besides changing the processes, the people in the business who will be working with the system are involved. Hyarchis engages your organisation by working with your people to analyse the document flows, pointing out the possibilities, and providing advice on the (possibly new) structure. And we show your employees how they can get the most out of the system.

Step 3: Determining integration possibilities

In this step, the systems HDM needs to be linked to are determined. How will HDM feature in your organisation and which tasks will be handled by other systems? Together, we look at how the documents will be composed and sent (for instance, through Hyarchis Document Composition).

Step 4: Drawing up the project plan

The results of steps 1 to 3 provide the input for the project plan, which is determined in close consultation with you. A project timeline is drawn up based on the requirements of the organisation and the impact of the integration with the current systems.

Step 5: Implementing the project

The project plan that has been drawn up in consultation is now implemented by your project team and the Hyarchis consultants.

The purchase

Various pricing models are available for the purchase of HDM:

- Purchasing an HDM licence based on document volume.
- Purchasing an HDM licence through a one-off investment. With this model, you also take out an annual
- maintenance contract for the software updates, new versions and support.
  Purchasing a monthly or annual licence. Maintenance costs are included in this model.

If your organisation has specific wishes regarding the pricing model, these can be discussed and arranged in consultation.

When you purchase HDM, Hyarchis always offers an implementation project, deploying Hyarchis consultants to install and integrate HDM and configure it for the first time.

Consultancy is offered on the basis of time and materials (a day rate applies). A component of the project is a compact course of training and instruction that will enable your employees to use HDM effectively. After implementation, our consultants are also available when required and on request so that you do not need to call in other external consultants.

The Microsoft SQL Server licence is not included with the Hyarchis licence: the SQL and SQL Client Access licences need to be purchased separately.

If you are ready to explore further, simply place your stamp on this product passport to arrange a meeting with Hyarchis.

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Contact us!
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> " *Corina Berkel, Operations Manager at Stater: "We couldn't imagine working without Hyarchis now. Virtually all Stater activities have something to do with documents, from processing them to consulting them. Of course, our own mid-office and back-office applications are just as vital to our business as document management, but a day without these systems would be unthinkable for our 500-plus staff. Since we've worked closely with Hyarchis over the years, our systems, processes and people all work like a well-oiled machine. That's what makes working with Hyarchis such a pleasure."* "

Get in touch with Hyarchis

Daalakkersweg 2-108
5641 JA Eindhoven
+31 (0)88 007 85 00
info@hyarchis.com

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