

# Hyland Automate



Take full control of your workflows with low-code, AI-enhanced, end-to-end content-driven process automation and service orchestration.

Organizations today face the challenge of managing an overwhelming volume of digital content. What was once a driver of efficiency has become a complex hurdle, affecting the speed and agility of operations.

As businesses strive to reclaim operational productivity, they are increasingly turning to automation. However, despite its promising potential, many enterprises have only begun to explore the depth of its capabilities and applications. Furthermore, they continue to encounter ongoing obstacles related to deployment speed, integration with existing processes and technology and the effective utilization of artificial intelligence (AI).

**Hyland Automate** is designed to transform these challenges into opportunities, optimizing digital content management through advanced intelligent automation and orchestration. At the core of our solution is a powerful, low-code automation and orchestration engine that seamlessly integrates digital content across your CRM, ERP or other Line of Business systems — be it invoices, purchase orders, contracts, employee documents, online forms and more. Additionally, **Automate** offers intuitive form and app-building capabilities, empowering users to customize workflows and applications to suit their unique business requirements.

**Automate** recognizes the inherent synergy between content and end-to-end process automation and empowers users to build, deploy and manage content-centric automation in the cloud.

With **Automate**, you can:

- **Harness intelligent services:** Utilize advanced technologies like large language models (LLMs) and data extraction tools to enrich and contextualize your digital assets.
- **Integrate with key business platforms:** Connect effortlessly with essential services such as Salesforce, Workday and SAP, ensuring a cohesive operational flow.
- **Enable user-driven innovation:** Provide your team with intuitive low-code tools for custom form and application development, fostering a culture of creativity and problem-solving.

## Features



### Dynamic and responsive forms and applications

Transforms traditional documents into interactive tools and fosters personalized user experiences across devices.



### BPMN (Business Process Model and Notation) orchestration

Simplifies process creation with standardized visuals, promoting intuitive orchestration for efficient workflow design and collaboration.



### Prebuilt connectors and APIs

Leverages out-of-the-box connectors and REST APIs to connect effortlessly to collaboration tools and synergize data between systems.



### Rules engine

Ensures consistent rule application across diverse processes and systems, facilitating automated decision-making and minimizing errors.

## Benefits



### Build

*Deploy and manage content-centric processes in the cloud.*

Leverage low-code, user-friendly automation and BPMN process designer functions to develop content-rich process applications that enhance your current systems — transforming traditional documents into dynamic, interactive content for quicker deployment, tailored user experiences and faster time to value. With a fully managed cloud platform, **Automate** can help you effortlessly scale up and down to manage varying workloads and demands, ensuring exceptional reliability and performance.



### Connect

*To anything, from anywhere.*

**Automate's** connectors and REST APIs seamlessly integrate with key line-of-business (LOB) applications, including customer relationship management (CRM), enterprise resource planning (ERP), AI and collaboration tools like Slack, Twilio, DocuSign, Salesforce, Workday, Microsoft 365, Amazon Textract and more. Users can customize interactions across devices, enhancing accessibility and flexibility.



### Automate

*All processes, from simple to complex.*

Transform processes into intelligent automations, orchestrating tasks organization-wide from simple document approval workflows to complex, content rich user journeys. Additionally, AI-powered automation significantly lowers costs related to manual processing, physical storage and human labor.



### Integrate

*Everything.*

Realize the advantages of cohesive integration. **Automate** capitalizes on synergy between content, user interfaces, REST APIs and data, integrating them across your core systems to provide a cohesive view into entire workflows and streamline lead-to-cash processes.



### Experience

*End-to-end content automation.*

Ensure consistent, accurate and repeatable outcomes, streamline operations, liberate resources for strategic initiatives and expedite time-to-market initiatives. **Automate** also comes built in with a rules engine that ensures constant application of rules across diverse processes and systems, minimizing errors and discrepancies. With total visibility and control over content and workflows, users can easily trace audits and adherence to regulations, as well as meet compliance and security requirements.



## Hyland Automate use cases

No matter your industry, **Automate** can navigate the complexities of digital content management, driving seamless automation and orchestration across a diverse range of tasks. From straightforward document approval workflows to intricate, content-rich user journeys, **Automate** empowers efficiency at every step.

- **Insurance:** Gain a unified view into your claims check processes — with real-time syncing and access to crucial data on a single platform — to reduce bounce rate and streamline critical revenue-generating processes.
- **Higher education:** Fully integrate **Automate** with your student information system to ease the transfer of documents and approval processes, expediting acceptances, onboarding and other student-related enquiries.
- **IT and digital services support:** **Automate** can integrate with your human integration design processes (HIDP), connect with enterprise resource planning solutions (ERPs) and serve as the central hub to maintain, develop and upgrade various technological infrastructures.

Learn more about [Hyland Automate](#).