



NUCLEUS
RESEARCH

ECM TECHNOLOGY VALUE MATRIX 2019

ANALYSTS

Barbara Z. Peck, Daniel Elman

THE BOTTOM LINE

Content management and collaboration is not sexy or flashy, but it is essential to the success of any business. Last year content management and collaborative services focused on security, due to the implementation of general data protection regulations (GDPR) and frequency of reported data breaches. Users also said that storage and scalability, embedded offerings, and reporting were their primary concerns. This year user feedback has been radically different thus far; leading with AI/ML, automation, integration, capture, and collaboration. Users stated that although security is still on their radar, they expect vendors to deliver secure products and are more concerned with innovation as a differentiator.



MARKET OVERVIEW

Nucleus Research Value Matrices are built from interviews of actual end-user data and the respective vendors are measured on both usability and functionality – key drivers of user value (Nucleus Research s142 – *Understanding the Value Matrix*, September 2018). The Value Matrix is a relative ranking that recognizes that markets change and solutions that don't as well, will fall behind. Traditional monolithic content management vendors will continue to shrink as buyers look for usability, functionality, and innovation (rather than

reputation), when selecting content and collaboration platforms. Some mature vendors will remain that won't expand their market position, as customers look for an integrated view of content management that spans the lifecycle of a document from inception to archiving.

As core functional capabilities mature, users and Nucleus expect vendors to invest in the following areas:

- **AI & ML.** AI is the umbrella term for any computer program that produces intelligence from a machine. Artificial intelligence (AI) is a set of capabilities enabled by machine learning (ML), is dynamic, can modify itself when exposed to more data, and does not require human involvement to uncover insights and make solution recommendations. AI is at the core of any modern CM and collaboration solution and is a logical next step for information management, enabling greater automation and elimination of manual repetitive tasks. Robotic process automation (RPA) is software that leverages artificial intelligence and machine learning capabilities to handle high-volume, repeatable tasks that previously required humans to perform, it is one example of the value AI & ML bring to the content management space.
- **Capture and accessibility.** Electronic data capture extracts information from a document and converts it into content readable by a computer. Optical Character Recognition (OCR) technology converts different types of documents, (paper and digital) into searchable and editable data, and now it can extract unstructured and PDF documents as well as tradition database information. Intelligent Character Recognition (ICR) is the capture of hand-written characters and is similar to OCR, but it includes the added complication of translating variable human scrawl. The future of OCR technology includes tools that can identify and interpret text that is not neatly arranged in rows and paragraphs.
- **Integration.** Most companies have more than one independent operating system or application with critical information. Without integrations, they are unable to communicate and process data directly. This electronic disconnect is inefficient and costs businesses money through in lost time and opportunity. Users are looking for integrations that aggregate data from disparate sources to form one coherent multi-functional system. Software integration can be used to simplify a lot of complex activities, and application programming interfaces (APIs) are commonly used connectors that are table-stakes for integrating complex enterprise technology stacks.
- **Collaboration.** A few years ago, remote working was declared 'gone' because a manager could not control the activities of a remote worker. As legacy managers retire, replacements realize that output and accuracy are more valid measurements of proficiency and remote work teams are returning to the table. Real-time

collaboration is the basis of team success and is designed to enable staff involved in a common task to facilitate efficient sharing of documents and knowledge.

Nucleus believes we've heard the last of the term "digital transformation" and can look ahead to innovative automation, integrations, agility, and accessibility. We predict that the content management and collaborative space will see more acquisitions and productive partnerships over the next two years.

LEADERS

Leaders in the Value Matrix include Box, Laserfiche, M-Files, Nuxeo, and OpenText.

BOX

Box has evolved from a simple sync and share application to a comprehensive content management platform. Box Cloud Content Manager (CCM) is known for its usability and collaborative capabilities, and is supported by security, governance, and compliance functionality. Box lets users work across a variety of content types, devices, apps and services both on-site and remotely. Its network of over 1,400 leading software providers (with straightforward integrations) enable businesses to use Box as a central content core while allowing their employees to continue to use familiar applications.

Recent announcements and updates include:

- **Box Skills.** Last year Box launched Box Skills Kit, a new framework and developer toolkit simplifying integration of ML services. Skills are bits of code that automatically run whenever files are uploaded to Box and apply AI to add information extracted from a file as metadata, so users can see and interact within Box. Metadata written by a Skill can also power other Box functionalities, like search enhancement and triggering retention policies. The Box Skills Kit is out of beta testing and now available for downloading.
- **ServiceNow Integration.** Box offers integrated content management to ServiceNow users with the ability to build custom workflows directly from the ServiceNow application, improving productivity by eliminating the need to toggle between applications.
- **Google Suite Integration.** Box is integrated with Google Suite, connecting teams and enabling bi-directional collaboration while maintaining Box permissions for document control to ensure content controls can be managed in one place. The Box-G Suite integration can improve productivity (like the ServiceNow integration)

and ensure that a business can centralize, manage, and secure its data in the cloud. In December 2018, Google announced that they are making Box for G Suite integration available to all G Suite customers.

- Metadata Driven Retention. Metadata is traditionally used for organizing documents. Box has expanded its use to include ability to apply a retention policy to an individual file via a metadata template. Companies can set retention policies across its Box account at the folder or file level in order to securely retain unstructured data to meet its policy and regulatory needs for data retention.

Box Content Management is known for its secure and easy capture process, including metadata, from any device. Nucleus found that usability, customer support, and straightforward integrations with existing company systems are the primary reasons for selecting Box Content Management; but they voiced concerns about risk management and security compliance in lieu of a recent report of data breaches. Nucleus found that this was an end user configuration error rather than a breach. Even so, Box addressed this issue with additional safeguards and proactive user communication. Box CCM can securely collaborate outside the organization, leverage ML, and deliver mobile access with capture functionality, all of which secures its position in the Leader quadrant for this Value Matrix.

LASERFICHE

Laserfiche is software for content management, business process automation, and productivity-boosting data analytics. Laserfiche solutions automates processes for finance and wealth management, healthcare, education, manufacturing, and state, local, and federal governments. It offers flexible licensing that includes on-premises, hybrid, private cloud and SaaS deployment. The vendor's industry-specific solutions are developed organically with delivered by global resellers and its internal sales group. Laserfiche assists its clients with GDPR and compliance, facilitating data subject requests, classifying and managing personally identifiable information (PII), enabling access controls, and applying retention policies. Laserfiche records management is one of the few content management products that fulfills DoD 5015.2 records management certification requirements.

Recent announcements and updates include:

- Laserfiche 10.4 release. The latest version of the software includes new features such as the ability to copy and paste elements from one process onto another, migrate processes from one environment to another, forms created from context, and add rich text field to forms. Set Entry Geolocation capabilities have been expanded to include automation for applying geolocation. This enables users to define information in geographical form, share and integrate it with other information.

- Apply Text Annotation enables users to hide, partially hide, or emphasize text in a document, reducing the incidence of manual errors and avoiding potential liability for inappropriate disclosures. For example, a user can redact a portion a document with PII to assure privacy.
- Set Records Management. Laserfiche allows the user to assign cutoff and retention policies directly to any entry in the repository, without requiring it to be located within the record series hierarchy, while enforcing security restrictions to support compliance requirements.
- Machine Learning. Laserfiche is utilizing ML on repetitive actions to deliver advanced business processing and robotic automation functionalities that produce data-driven insights and identify process inefficiencies. Laserfiche robotic process automation features allow organizations to use software bots to automatically perform clicks and keystrokes across the screens of applications, enabling organizations to more easily build complete end-to-end automated solutions. These bots work alongside employees so they can better focus on more decision-driven, engaging and valuable work. Predictive analytics based on machine learning provides insight for task and process performance.

Laserfiche continues its investment in technology with a view to the future, focusing on automation, cybersecurity, risk management, secure records management, audit tracking, and audit reporting. The high level of usability combined with broad functionality makes Laserfiche the benchmark for usability in the Leader quadrant for 2019.

M-FILES

M-Files offers an intelligent content management (ICM) solution based on three distinct concepts – it is metadata-based, repository-neutral, and AI-powered. In contrast to traditional search engines, the intelligent metadata layer enables the user to search for data based on what it is rather than where it is stored. The solution is repository-neutral for greater access to data regardless of location and allows for access and editing-in-place instead of migrating content to the user's location. M-Files uses AI, ML, and third-party algorithms for automation and auto-classification. The M-Files solution is unique in that it has the same licensure for on-premises and cloud deployments, eliminating a financial obstacle that businesses face when considering transitioning to the cloud. System and product updates are frequent, automated, and do not require IT intervention.

Data security is a priority and M-Files provides robust features such as access control and permissions, automated audit trails, federated authentication, file encryption in transit and at rest, intrusion detection, and data loss prevention. Its metadata-driven automatic permissions are a patented approach to managing access control by what content is and

ensures that access control policies are enforced across all repositories. M-Files manages regulatory risk of non-compliance by organizing, recording, and automating all data in the business. M-Files supports GDPR compliance and enables a business to identify and locate sensitive information including PII.

Recent announcements and updates include:

- M-Files Online. M-Files Online is a hybrid option that enables organizations to combine cloud and on-premises deployments using a single user license with a system-neutral approach to information management that enables a business to become cloud-ready.
- M-Files Smart Classifier. Smart Classifier is a cloud service that leverages ML to auto-classify information without infrastructure and can be used on top of an on-premises deployment.
- M-Files Smart Subjects. Smart Subjects is an intelligence service that generates metadata suggestions based on the document subject matter, even if keywords are not in the actual document.
- M-Files Discovery. Discovery is an AI service that can 'crawl' repositories and flag content based on context.

M-Files roadmap for the future remains user-centric and continues to invest heavily in research and development (R&D) for performance improvement, platform development, and vertical solutions. New options such as M-Files Smart Search, a cloud-based search engine for in-memory databases, will be available later this year. M-Files position in the Leader quadrant is supported by its strong technology, user-centric functionality, and robust usability. Nucleus expects that M-Files will continue to set the standards for content management functionality in the near future.

NUXEO

Nuxeo offers a flexible content management solution that can be deployed in the cloud, on premises, or in hybrid environments. The solution centralizes information and content on the platform by connecting to other enterprise content management (ECM) tools and workplace productivity applications like Salesforce. The solution can handle traditional content formats like PDFs and scanned documents along with newer media such as audio, video, and images. It uses metadata to describe assets and facilitate top-level sorting and analytics. The solution can handle the content and data volumes of large businesses; this performance along with advanced features like Elasticsearch and metadata-based analytics make Nuxeo a viable option for global enterprise customers.

In January, Nuxeo announced LTS 2019, its annual platform upgrade. New features and capabilities include:

- Improved AI framework. Out-of-the-box AI modules that customers can deploy to augment content with insights from AI services and models deployed on Nuxeo Online Services.
- Integration with Office 365 and Adobe Creative Cloud. Customers can edit files within the Office 365 suite and can access Office 365 files by clicking a link within the Nuxeo Web UI. The integration with Adobe was rebuilt to allow customers to leverage the complete capabilities of Adobe Creative Cloud in Nuxeo.
- Content federation. The platform can manage content “in place” (i.e. without migrating it onto the platform). This is useful in secure environments where content cannot be moved and can reduce the cost and hassle of forced migrations by providing another option.
- Pluggable accelerated transfer for upload services. Nuxeo can plug into any direct upload service to speed up the transfer of files. Transfer acceleration is available for Amazon S3 and connectors to other services like Microsoft Azure can be created easily.

Nuxeo has demonstrated a customer-centric focus and continues to invest in relevant features that improve the customer experience. The most recent update shows improvements to AI and metadata analysis, showing that Nuxeo is keeping up with or even outpacing other vendors in the market in new functionality. We position it comfortably in the Leader quadrant because of its user centricity, strong product usability, and emphasis on cutting-edge functionality.

OPENTEXT

OpenText is a comprehensive life-cycle content and information platform that delivers out-of-box functionality, intuitive user interface (UI), and seamless integrations with all OpenText offerings and external enterprise applications. It offers flexible deployment options and scalability (both with industry specific verticals and across horizontal applications) and it is known for its stability. OpenText ECM software delivers solutions that link content management to businesses processes supporting user productivity, secure records management and enterprise governance, and AI driven analytics and reporting. OpenText Content Suite offers Intelligent Capture from multiple sources including unsecured data, strong governance and regulatory compliance, and advanced search capabilities.

Recent announcements and updates include:

- Release 16 EP6 and Cloud 19.2. These releases will be available in the first quarter of 2019 and offer multiple developments including expanded integrations with SAP BPM, expanded low-code developer tools, AI augmented capture capabilities, increased leverage of ML, and advanced analytics and reporting options.
- Catalyst Repository Systems. OpenText acquired Catalyst Repository systems, an e-discovery solution, for its automation capabilities for the legal community. It will be integrated into some existing OpenText products.
- Liaison Technologies. Liaison Technologies is a cloud based B2B integration and data management solution that will be integrated into OpenText Business Network. The technology will enable greater agility to OpenText users accelerating an enterprises' ability to react quickly to changing market conditions and customer requirements.
- Captiva 7.7 release. This release expands the capabilities of the capture platform, improves usability, and enables greater integration with an enterprise's information strategy. Captiva captures and processes documents from multiple sources, including scanners, fax servers, email servers, file systems, and web services.

Collaboration was a key focus for users Nucleus spoke with. The OpenText solutions, OpenTextCore for the cloud and Hightail for creative, multimedia users were noted as meeting these needs. OpenText Content Suite users were unwavering in their support of the platform's clear documentation, intuitive UI, and consistent customer support. Although some users commented on the deployment complexities and confusion due to multiple overlapping options available, they also said that these issues were alleviated by the support they received from OpenText staff; which supports OpenText's position in the Leader quadrant.

EXPERTS

Experts in the Value Matrix include Alfresco, Digitech Systems, Hyland, and IBM.

ALFRESCO

Alfresco Content Services is a flexible and scalable platform that delivers a wide range of ECM use cases including content and governance services, contextual search and insight engine, and the ability to easily integrate with other applications. It has cloud-native architecture with an open and modular approach to content management that delivers

scalability whether deployed on premises or in the cloud. Alfresco is differentiated by its rapid deployments, ease of customization (both UI and backend), shortened time-to value, agility, and contextual search capabilities. Its content services can be seamlessly integrated with all Alfresco offerings but require separate licensure. Document capture functionality extracts data from nearly any source with OCR capabilities and auto-classification of scanned files, and AI capabilities extract important data and deliver actionable insights. Additionally, Alfresco Content Services is the only vendor in this space with native connectors to Amazon Glacier, reducing storage costs for end users.

Recent announcements and updates include:

- Content Services 6.1. This release has cloud-native architecture with new containerized deployment options, upgraded integrations, and service modularization.
- DoD Certification. Alfresco is the first open source vendor to receive DoD 5015.02 certification and is qualified to manage classified federal records.
- Alfresco Search and Insight Engine. This is an integrated contextual analytics solution that enables clients to make business decisions based on real-time data.
- Alfresco will be releasing several announcements about AI, integrations, and ML to promote additional capabilities including improved scalability, data extraction, management of disparate types of unstructured data.

Ease and speed of deployment, along with out-of-the box functionality, were noted by interviewed users as key factors in selecting Alfresco Content Services. Alfresco's cloud partnerships (such as with Amazon Web Services) continue to position it as a viable alternative for companies that are looking for a modern open-source and standards-based content and process driven services platform. Alfresco is positioned in the upper segment of the Expert quadrant and Nucleus expects minimal impact from cultural changes of new ownership. Alfresco continues to operate at a high level of performance post-acquisition with stable management and engineering teams.

DIGITECH SYSTEMS

Digitech Systems software delivers an end-to-end system of automated data capture, content management and collaboration, secure content storage, and automated business processes that can be deployed on premises (Paper Vision) and in the cloud (Image Silo). Digitech distinguishes itself from other vendors with its use of patented AI algorithms to build a multi-dimensional profile of captured content that differentiates and classifies data and uses ML to ensure that imported data is extracted and populated efficiently. The Digitech business model delivers its solutions via independent software vendors (ISV) so it can focus its efforts on R&D rather than sales and marketing. Digitech's growth has been

entirely organic and as a result its software suite integrates seamlessly. Consistent with market trends, Digitech also offers a hybrid option for users with specific regulatory requirements or who are working towards transitioning to the cloud.

Recent announcements and updates include:

- **Optical Character Recognition.** OCR now includes software similar to facial recognition technology to capture content more accurately. Paper Vision Capture can classify data automatically which eliminates manual processing, improves efficiency, and manages risk resulting from human error.
- **Robotic Processing Application.** Digitech has RPA Suite tools that use bots to access apps for routine and manual tasks to replace human activities. Although delivery of this solution lagged competitor, it is natively built and reflects user input and need, resulting in a stronger and more stable solution. Digitech has enhanced compliance and security with granular document and project level permissions, supported with advanced encryption standards.
- **Amazon Web Services.** Digitech moved ImageSilo to AWS in a strategic move designed to offer greater global access, redundancy, and transparency for end users. AWS's data durability is sturdier than other cloud providers and offers end users greater bandwidth, storage, and computing power.
- **Usability.** Digitech made improvements to the user interface to enhance usability which include the familiarity of a Windows-like UI, adding new document groupings, and making full-text search a standard feature. There are new e-forms capabilities designed to make building complex forms simpler and avoid the need for IT actions.

Digitech's commitment to ongoing product development, good usability, and robust functionality, keep it as a strong performer in the Expert quadrant of the 2019 Value Matrix. Unlike most white-label or embedded offerings, Digitech delivers direct support as needed to end users and Nucleus found strong loyalty among them. Digitech Systems has proven to be one of the most stable content management providers validating its position as an Expert in this year's Value Matrix.

HYLAND

Hyland's enterprise information platform OnBase delivers ECM, case management, business process management, secure records management, and capture capabilities on a single database, code base, and content repository. By combining these capabilities, OnBase serves as a low-code rapid application development platform that can create content-enabled solutions across an enterprise, integrate with its core applications, and be accessible via a variety of devices. OnBase features include automated document classification, easily configurable point-and-click approach that requires little or no custom

code, high functionality, an e-signature solution, and process automation for repetitive tasks. The product has industry solutions for healthcare, insurance, higher education financial services, government, and back office. Hyland's multi-channel capture capabilities ensure that content is captured into the solution, regardless of how or where it is received. Additionally, intelligent capture solutions automatically extract important information from incoming content to deliver organized content storage within the solution as well as automated updates for all relevant systems. ShareBase extends the OnBase platform with automated file sharing and secure document collaboration.

Recent updates and announcements include:

- OnBase 18 release. This release offers improved mobility and integrations with core business applications, streamlines access to critical information regardless of location, delivers content-on-demand, in real-time. A new combined viewer personalizes the display of content and data into a streamlined and consolidated view.
- Image Forms. Low and no-code forms creation tool that replicates paper forms electronically with the ease-of-use and accessibility of an electronic form.
- Enterprise Search Federator. This is a new interface that enables users to discover OnBase documents and other content sources across an organization. It improves privacy compliance and delivers the capability to analyze and explore relationships between separate pieces of information to support data driven decision making.

Hyland is a mature provider whose R&D strategy is focused on continuing to develop additional agility and improve productivity with convergence (the merge of distinct technologies into a single unified platform). Customers interviewed noted Hyland's vertical offerings, high-quality UI, data security, and agnostic repository search capabilities as primary reasons for selecting OnBase. As Hyland continues its current strategy it should keep in mind that some users pointed out they experienced navigational complexity without clear documentation as an area of concern. Hyland is an Expert in this Matrix and Nucleus sees its position improving with continued focus on R&D.

IBM

IBM's content management portfolio includes Content Navigator, FileNet, and DataCap. These tools are available in full cloud, on-premises, and hybrid cloud environments and offer advanced document capture, metadata annotations, advanced search using NLP, and collaboration capabilities. ML is built onto the platform to enable analytics on all the managed content. These content tools are integrable with the IBM Digital Business Automation (DBA) Platform to automate repeated workflows including document access, share, or edit. Like many IBM products, it offers robust functionality, but customers have

described it as being inflexible and best suited for enterprise deployments where companies have plentiful IT resources.

Recent product improvements and upgrades to IBM Content Navigator include:

- External share outside of the organization. Users can share documents that are stored in their organization's content repository with users on the outside to facilitate collaboration.
- New video viewer that enables streaming.
- Move documents to Recycle Bin for deletion or restoration.

As an established vendor in enterprise software, IBM has an expansive product portfolio and the budget (and academic talent) to perform cutting-edge research and product development. As a result, its products offer industry-leading functionality in most application types, although a common complaint is that they are difficult to use without technical expertise and inflexible to configure. Enterprise customers with the budgets and developers to manage the system can benefit from the robust functionality, particularly in complex work environments that require extensive collaboration or content access. Deep integration with the DBA product is another key differentiator, allowing users to automate repeatable tasks involving the content stored in the ECM system. IBM is an Expert in this Matrix considering the customer comments regarding usability and the end-to-end functionality it delivers.

FACILITATORS

Facilitators in the Value Matrix include DocStar, DocuWare, Micro Focus, and Microsoft.

DOCSTAR

DocStar, which is owned by Epicor, offers a browser-based content management and business process automation platform. It also supports smart data capture, electronic forms, and disaster recovery. It leverages the relationship with Epicor for integrations, additional analytics, mobile capabilities, and cross-sales. It offers all aspects of core ECM functionality but notably lacks a governance module; security features like document permissioning are available though not as comprehensive as some competing vendors.

In February of this year, DocStar announced the 2019 upgrade to its ECM solution. Relevant updates and new capabilities include:

- New integration with DocuSign eSignatures to sign and authorize documents electronically.

- Simplified navigation and other usability improvements enable easier content administration.
- Administrators can assign workflow tasks to users, streamlining collaboration on the platform.

The company has demonstrated commitment to improving its product usability while still adding useful new capabilities like handling eSignatures. It lacks some of the more cutting-edge functions like AI-powered indexing and metadata analysis, however it meets all the criteria of a traditional ECM solution. Based on the attention dedicated to product usability, DocStar is positioned in the Facilitator quadrant.

DOCUWARE

DocuWare specializes in delivering digital content services for small to mid-size businesses looking to digitize and automate common business processes in finance, human resources, and more. The platform provides robust content capture and information indexing, document management and workflow intelligence, as well as complete integration capabilities. DocuWare is available as a multi-tenant SaaS application in the cloud, as an on-premises deployment, or in hybrid configurations. The cloud and on-premises versions have complete feature parity. The company offers pre-configured solutions for invoice processing and employee management. and its extensive partner network frequently deploys sophisticated document management solutions at the enterprise level.

DocuWare maintains an active and feedback-driven update cycle. Recent product updates and improvements include:

- Intelligent indexing, an ML-powered feature that automatically reads and indexes documents for more efficient search.
- E-forms allow customers to capture any data needed with custom forms, created in a low-code environment that doesn't require technical training.
- Workflow manager automates processes like document routing and approval, index data manipulation, and content archival.

Out-of-the-box functionality and ease-of-use are key to DocuWare as it is committed to offering customers a product that will deliver ROI quickly. It eschews some of the more advanced functionality that enterprise-grade solutions are building like metadata analysis, however it delivers far more capabilities than barebones solutions. DocuWare is positioned as a Facilitator in this Matrix for its ease-of-deployment and the speed that it can deliver real business value to customers without the cumbersome IT complexity that other vendors are rushing to build in.

MICRO FOCUS

Micro Focus modified its vision for its business model- to become more user-centric while retaining a strong emphasis on security. With that said, Micro Focus has announced an updated user-strategy that organizes the business into four distinct focus areas, Enterprise DevOps, Hybrid IT, Predictive Analytics, and Security Risk Governance (SRG). Secure Content Management (SCM) is part of the Micro Focus SRG space managing content and risk with a proactive approach to security, automation, and application of policy classifications throughout the full lifecycle of a document. Enhancements to the business model include a holistic and integrated approach to product development and customer service with a broad and integrated portfolio to secure and govern information. Advanced analytics throughout the system provide automated classification and policy enforcement.

The SCM Suite includes three products. Control Point provides end-users the ability to access, analyze, and classify unstructured information. Structured Data Manager provides the same capabilities for structured data. Content Manager delivers a repository to manage information throughout the product lifecycle and, advanced analytics and governance capabilities underlie all three components. Micro Focus Collaboration delivers secure access to messages, files, printers, internal systems, and corporate applications, for the mobile workforce.

Recent announcements and updates include:

- Acquisition of Intersect. Intersect is a cyber-security specialist with extensive experience in entity behavioral analytics (UBEA) and ML. It was acquired to supplement Micro Focus predictive analytics techniques for executing rapid and accurate threat-detection analysis and add additional depth to SRG.
- File Governance Suite. The file governance suite enables users to archive and recover critical information and comply with privacy regulations such as GDPR.

Nucleus interviewed Micro Focus former HPE content management users and found that they are more optimistic and satisfied with Micro Focus since the last Value Matrix. Customers noted that support is more accessible and responsive. This feedback, in addition to the improvements to the business model support Micro Focus's strong position in the Facilitator quadrant.

MICROSOFT

SharePoint is Microsoft's collaboration, document storage, content management solution. SharePoint was once considered a storage solution for on-premises deployments but now offers cloud and hybrid solutions which are scalable and integrate seamlessly with other Microsoft products. Features include use of metadata to define hierarchy, improve search

functionality, and auto-tagging of documents for ease of retrieval. Additional features include Document Sets (a group of related documents can be managed as a single unit), publication of rich webpages in intranet or internet, records management, and Information Rights Management (IRM) that prevents access to sensitive information by unauthorized users.

Recent updates and announcements include:

- SharePoint 2019. This release is a similar core platform as the 2016 release with additional functionality and enhanced hybrid experience. The 2019 release focused on three areas – improved user experience, integration across all browsers and devices, and enhanced security and compliance. A new SharePoint homepage, an improved knowledge base of lists and libraries, new team site pages, and faster search capabilities are included in this release.
- SharePoint Migration Tool. The SharePoint Migration Tool enables content migration from Point Server 2013, to easily move them to either SharePoint 2019. Unfortunately, SharePoint 2010 is the most widely used version and requires migration to SharePoint 2013 and 2016 before final relocation to 2019.
- SharePoint hub sites. SharePoint hub sites connect and organize locations based on project, department, division, or regional attributes. This functionality makes it easier for a user to discover related content, apply common navigation, and search across associated sites.

Nucleus interviewed SharePoint users and found agreement in their satisfaction of Microsoft's file sharing and collaborative capabilities. Also noted as a strength by end-users are its data discovery and search capabilities, which together lead to actionable insights. Some end users indicated that initial implementation could be complex and time consuming, but usability improved once deployed. Nucleus found that SharePoint is best suited for existing Microsoft clients for seamless integration and use of the Microsoft ecosystem is essential to achieve the full benefits of the product. SharePoint users did not talk about any urgency for cloud migration and seem satisfied with the hybrid solution. SharePoint remains a strong on-premises provider in the Facilitator quadrant.

CORE PROVIDERS

Core Providers in the Value Matrix include Documentum, Egnyte, HighQ, and Salesforce Quip.

DOCUMENTUM

Documentum is a mature and stable platform primarily focused in high governance enterprise users such as public sector, healthcare, and Life Sciences - due to the solution's strong security capabilities. Documentum's extensive storage capacity is attractive to some high-volume enterprises such as heavy industry, manufacturing, and energy. Documentum has a large and loyal install base very different than the OpenText Content Suite client base. Although OpenText has promised on-going investment and support for Documentum current users interviewed said they had not seen evidence of any innovation or enhancements to the existing product.

There have been no relevant announcements or updates since the last Value Matrix.

Nucleus interviewed current Documentum users, and all referred to the platform as both stable and predictable, with solid functionality. Clients said that they considered Documentum a highly reliable document storage system with good security but needs sophisticated IT support to achieve full functionality. Several noted that its records management capabilities are very strong that hat deployments took a long time (in some cases greater than nine months) but once fully operational it meets all their needs. Nucleus was unable to find recent deployments and cannot accurately evaluate the success or failure of the actual implementation process.

Documentum users appear to be satisfied with its stability and performance and voiced approval of OpenText's support of the product. Documentum was described by users as a good solution for high volume demands but recommend an extensive training plan to ensure end-user adoption and participation. OpenText has committed to back the Documentum platform and users report that OpenText has delivered on its pledge. For these reasons Documentum remains a Core Provider in the Value Matrix but will need to deliver additional functionality and enhance usability to attract new customers and to remain competitive.

EGNYTE

Egnyte Connect is a complete ECM product with workflow automation capabilities and an emphasis on content permissioning and security. It serves organizations of all sizes, from enterprise to single office, but is best suited for large-scale deployments with its advanced content governance features and investment in edge technology like ML. The product gives users unified control over information and supports content collaboration (inside and outside the organization), and compliance management. Egnyte Protect helps keep content and data secure, both in the cloud and on premises, with end-to-end encryption and governance capabilities. The solution is GDPR compliant across all 28 EU member states and supports 24 major languages.

Recent updates to product features and capabilities include:

- A revamped UI. Redesigned the UI to accommodate typical user behavior; new capabilities are clearly displayed and there is a new tab for recently viewed files. The UI is the same across Windows and Mac to ensure continuity and easy onboarding.
- Improved device management. Device entitlement allows admins to define which devices are approved to access the system. If a permissioned device is lost or stolen, admins can remotely wipe that device or user of content from the system.
- Egnyte Archive. A cloud-based repository for centralizing all company data that integrates with the content platform.
- Privacy updates. The solution locates, controls, and secures sensitive data to ensure compliance with privacy regulations including GDPR and CCPA (California Consumer Protection Act).

As a newer vendor on the ECM scene, Egnyte is competing for market share against companies with more mature product offerings; however, it is obviously seeing success with security-minded customers. Interviewed customers consistently cited the security and content governance as differentiators of the product. Egnyte is moving to add more complete functionality; it should take care that the focus on security doesn't become a hindrance to developing competitive collaborative capabilities which are in high demand among ECM customers. Egnyte is positioned as a Core Provider in the Matrix and will likely see its position improve with continued customer adoption and reinvestment in the product.

HIGHQ

HighQ, a legal technology solution provider is a new vendor in this year's Value Matrix. Its solutions include operations, client engagement, project management, risk management, contract management, social collaboration, knowledge management, in addition to content management. HighQ unites internal and external users with flexible and seamless integrations. Its modern legal technology delivers greater efficiencies and productivity. Lawyers and their clients can securely exchange critical business information and work jointly in real-time with colleagues, customers, and partners in a single integrated space. HighQ was primarily a European company and expanded its North American availability with a third office in Kansas City.

Recent announcements and updates include:

- HighQ 5.0 release. The 5.0 release unites HighQ's collaboration and publishing solutions into a single platform. A new workflow engine automates manual tasks and enables firms to re-engineer its legal processes which produces operational efficiencies converting repetitive activities into automated intelligent processes

including project management, due diligence reporting, AI-powered contract review, and transaction and litigation management. This release also features new improvements to manage complex projects and transactions.

- AI Hub. HighQ joined with Kira Systems (as a launch partner) for the new AI Hub which allows supported third-party AI engines to be integrated seamlessly into legal processes and workflows within the HighQ platform. Users benefit from the ability to move documents from HighQ to Kira for in-depth analysis that HighQ stores in the AI Hub, accessible to customers.
- Corporate Law Platform. This new offering was developed to give in-house legal departments the tools to streamline its legal operations. It features intelligent-work and collaboration capabilities to produce operational efficiency and improve productivity.
- Acquisition of Legal Anywhere. A Portland, Oregon based company, Legal Anywhere is a software and technology firm specializing in collaborative and file sharing solutions. This purchase will leverage the expertise and resources of Legal Anywhere with the intelligent work platforms offered by HighQ.

Many legal firms eye technology as a disruptive concept not suitable for their type of work. HighQ is changing how legal firms and in-house counsel complete their work with AI automation, reducing the time for due diligence, document review, and responses to clients. The HighQ solutions are transforming the status-quo of a market traditionally resistant to change. Nucleus found that law firms working with HighQ achieved faster time-to-value, greater efficiencies, and improved customer relations. HighQ is in the Core Provider quadrant of the Value Matrix as a niche player, specific for legal professionals.

SALESFORCE QUIP

Quip is a Web-based collaboration and productivity tool that allows users to share and collaborate on documents, spreadsheets, chat, and slides; and integrates with Salesforce. Users can collaborate on projects in real time via the Web and documents within Quip can be connected to external spreadsheet and Salesforce data. Live Apps for Quip allows users to combine the workflows and applications needed in a single Quip document to reduce time wasted toggling between screens; some available apps include Smartsheet, PDFfiller, and draw.io, and they are available for download on the Salesforce AppExchange. Customers can configure these Live Apps to handle custom projects and workflows.

Recent updates and announcements include:

- Quip for Salesforce lets users embed docs, spreadsheets, and other Quip-content directly within Salesforce objects and records.

- Quip for Sales includes collaborative documents for sales teams embedded within Salesforce to help give visibility and standardization to the sales process.
- Quip for Service includes collaborative documents for service teams embedded within Salesforce allow service agents to centralize information and collaborate on handling cases.

Quip offers all the traditional functionality of basic “sync-n-share” content management solutions. As a browser-based tool, it is lightweight to run and easily accessible wherever there is an Internet connection. It lacks the ability to handle more sophisticated forms of content and is well suited for departmental or team-based usage although it would not be viable as an organization-wide content management tool. It is positioned as a Core Provider in this Matrix as it offers core content management and collaboration capabilities without the complexity or high price point of leading solutions.