



NUCLEUS
RESEARCH

CSC Technology Value Matrix 2026

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The Bottom Line

The content services and collaboration (CSC) market is maturing rapidly, intensifying competition. Once-differentiating capabilities, such as low-code workflow automation, IDP, and basic generative and agentic AI features, have come to be expected. Competitive advantage is shifting toward customer support quality and features' ability to drive measurable operational impact, rather than simply checking a box. Cloud migration remains a priority, driven by faster access to innovation. However, some vendors still support on-premises parity or content federation for regulated industries requiring flexibility. AI adoption remains pragmatic and focused on practical use cases that can deliver tangible benefits. For vendors, the successful delivery of more advanced capabilities, such as multi-step agentic workflows, requires strong security, governance, privacy and interoperability with external business systems.

Market Overview

Competition within content services and collaboration technology market is intensifying as functionality that once differentiated few vendors has become a commodity. For example, low-code workflow automation, intelligent document processing (IDP), and other entry-level Gen AI and Agentic capabilities have become table stakes. Moving forward, vendor success will rely more on the quality of customer support and success they deliver, as well as the delivery of AI features that drive tangible improvements to customers' operations in practice. Additionally, the broader, overarching collaboration aspect of content services platforms is taking center stage as more organizations look to these systems as "Swiss army knives" that not only organize content and execute workflows but also provide tools that add efficiency to asynchronous, content-centric tasks both between internal and external stakeholders. For example, some vendors have introduced dedicated portals and hubs that organize content in a way that takes the context of a specific team, project, or individual into account.

Cloud migration has become a more pressing, strategic initiative as organizations are pushed by factors including heightened on-premises costs and quicker access to new features afforded by cloud infrastructures. Vendors are supporting this shift with migration resources, with some continuing to support full feature parity for self-hosted and on-premises customers. For organizations operating in heavily regulated environments, some vendors are putting more emphasis on content federation, adding a layer to existing infrastructures that enables the addition of more advanced, cloud-based capabilities. Additionally, given its foundational role within an organization, the value of a content services solution is increasingly defined by how well it communicates with other core business systems, such as ERP, CRM, and HCM. This is less complex with cloud-based systems that support open APIs, further supporting the case for migration.

Adoption of AI in the CSC market, much like its development, is pragmatic and focused on where it can most effectively drive outcomes. Vendors are continuing to develop agents that can execute multi-step workflows on a user's behalf. Other capabilities include content insight and summary generation, and conversational search capabilities that enable users to query their repository in natural language. AI is also adding strength to IDP, contributing to more accurate classification, indexing, and extraction of data from both structured and unstructured content. Stringent security, governance, and privacy measures must

Capabilities that once served as differentiators in the CSC market are becoming commodified.

CSC platform value is increasingly defined by how well it can integrate with other business systems, including CRM, ERP, and HCM.

remain at the core of all content services investments, especially as organizations weigh the risks and advantages of AI investments.



In this year's Value Matrix, Nucleus evaluated content services and collaboration providers based on the relative functionality and usability of their solutions, informed by the value that customers achieve from the use of the products' capabilities (Nucleus Research X222 – Understanding the Value Matrix – December 2023). The report is intended to serve as a snapshot of the CSC technology market, informing customers about how vendors are meeting customer requirements and what can be expected from the market in the future based on current developments.

Leaders

Leaders in the Value Matrix include Box, Epicor, Laserfiche, M-Files, and Zoho.

Box

Box offers an Intelligent Content Management Platform that combines content and AI capabilities to enable agentic automation of workflows and the delivery of strategic insights while maintaining security and compliance. Functionality spans content capture, workflow automation, collaboration and whiteboarding, e-signature, security, governance, and compliance. The platform is also extensible, offering more than 1,500 pre-built integrations with business systems and apps, including Salesforce, Slack, Workato, NetSuite, Jira, and productivity suites from Microsoft, Google, and Apple. The vendor's APIs and developer tools support configuration of the platform to specific organizational requirements.

Box AI is a suite of AI-powered tools natively integrated into the Box Intelligent Content Management platform, enabling users to summarize documents, extract data, run complex queries across multiple files, and generate new content with ready-to-use agents. However, the vendor also offers the ability to build custom agents through the Box AI Studio for unique uses, without the need for coding.

Security remains a high priority for Box, offering its Box Shield product to deliver intelligent, frictionless security features to protect the flow of content. Additionally, the Box Trust Center details the vendor's security, privacy, and compliance certifications. The Box Trust partner program further extends the platform's compliance functionality through a select group of security and compliance partners.

Recent updates and announcements include:

► Box Extract

Box announced Box Extract, a tool that uses agentic reasoning powered by the vendor's Standard and Enhanced Extract Agents to extract information with higher levels of accuracy.

► Box Apps Update

The vendor introduced new AI-driven capabilities in Box Apps, a solution that enables organizations to build intelligent no-code dashboards that unify content, metadata, users, and workflows.

Box's Intelligent Content Management Platform combines content and AI capabilities underpinned by stringent security and compliance.

► **Box Shield Pro**

Box Shield Pro was announced, positioned as a suite of security capabilities that are powered by AI.

► **Box Agent**

Box introduced the Box Agent, using capabilities from OpenAI, Anthropic, and Google to execute tasks based on users' requests, including creating files in multiple formats, generating reports, and summarizing complex documents and multi-file collections.

► **Box Automate**

Box announced the general availability of Box Automate, an agentic workflow automation solution that enables organizations to orchestrate work across agents and teams. The solution supports routine task automation, as well as fully autonomous cross-system agentic workflows.

The Box Agent uses AI to execute tasks based on user requests, including summarizing complex documents and multi-file collections.

Epicor

Epicor ECM (Docstar) is a cloud-first content services platform that uses AI-powered intelligent document processing to bridge the gap between unstructured documents and structured business processes. Capabilities include electronic form creation, intelligent data capture, customizable workflows, analytics, and disaster recovery. The platform automates classification, indexing, and routing of content using AI and machine learning, enabling organizations to eliminate manual touchpoints and accelerate workflows.

Epicor ECM's native integration with the vendor's ERP solutions remains a differentiator, offering prebuilt workflows across business functions such as accounts payable (AP), new-hire onboarding, and sales order processing. The platform also includes a no-code Workflow Designer, offering modern flowcharting elements and UI controls to ease adoption. Further, the vendor partners with iPaaS provider Workato, enabling organizations to connect apps and automate processes across systems.

Epicor ECM natively integrates with the vendor's ERP solutions and offers prebuilt workflows across various business functions.

Epicor's PRISM AI platform includes an ECM Agent, enabling users to query PRISM's conversational user experience to get insights and answers to questions from anywhere in the repository. The vendor is continuing to expand this agent across its suite of ERP solutions, including Kinetic and Prophet21. Additionally, Epicor ECM has an AI Predictive Data Entry tool, which uses predictive machine learning models to predict the value of fields that would otherwise need to be entered manually.

Recent updates and announcements include:

► **Government Cloud**

Epicor ECM now provides a Government Cloud option for customers with sensitive government content. The initial release provides ITAR compliance with plans to support CMMC Level 2 in the future.

► **Expanded AP Automation Capabilities**

The vendor has expanded its AP automation capabilities to include freight invoice validation through integration with Epicor Quick Ship.

► **Enhanced Integrations**

Enhanced native integrations with Epicor's Eclipse and BisTrack products were introduced to provide embedded document access and automate content capture directly within ERP workflows.

► **Data Capture & Extraction**

Epicor introduced purpose-built data capture and extraction capabilities that are designed for high-volume document scenarios such as invoices, contracts, and order processing to improve data accuracy, reduce manual validation requirements, and accelerate downstream workflows.

► **Enhanced Compliance**

Epicor ECM now includes expanded compliance capabilities designed to support German GoBD requirements and IDW PS 880 audit standards.

Epicor ECM now provides a Government Cloud option for organizations with sensitive government content.

Laserfiche

Laserfiche is a provider of enterprise content management and business process automation solutions that can be delivered through the multitenant Laserfiche Cloud, self-hosted in an organization's private cloud, or on an on-premises or hybrid basis. The vendor emphasizes information governance and security across the content lifecycle, with SOC 2 Type 2 and HIPAA security controls, as well as ISO 27001 certification. This makes the platform an attractive choice for organizations operating in heavily regulated industries. Beyond secure storage, Laserfiche has introduced AI capabilities that enable users to turn unstructured data into actionable insights through automated text extraction, Smart Fields for metadata capture, and intelligent search enrichment through Smart Chat. The platform is also extensible,

offering a set of RESTful web APIs, custom pre-built integrations, native app connectors, MFDs, and an iPaaS solution.

Laserfiche's content repository can be accessed across web and mobile interfaces, with drag-and-drop capabilities that enable easy upload and organization of data. Meanwhile, information governance capabilities enable customers to retain a single source of record for content and metadata after business processes run. The Laserfiche Solutions Marketplace includes hundreds of templated solutions created by both the vendor and its community of users. This, in addition to low-code and no-code workflow automation tools, can save time spent building automated workflows. The vendor also offers Laserfiche Forms, a web-based application that enables organizations to create, route, and manage electronic forms without the need to write any code, with automated routing of approvals, dynamic logic, and public portals to publish forms and collect data from external stakeholders. Laserfiche Workflow and Forms processes can be tested and iterated on before they are deployed, mitigating disruption.

Laserfiche AI powers the vendor's Smart Fields and Smart Chat features. For example, Smart Fields uses AI to extract data from documents into fields based on natural-language descriptions of the information users are looking for. Smart Chat enables users to receive insights about their documents through natural language queries in a conversational interface. The vendor has also recently introduced Laserfiche AI Agents, providing users with the ability to automate document management tasks with natural language prompts. For example, users can move, rename, and organize documents by describing what task they want to accomplish. On the back end, agents analyze the request and generate a preview of planned actions that must be approved by the user before any changes are made. These agents can also handle multi-step and multi-action requests. Process agents, releasing in the second half of 2026, continue this trend of providing automation assistance by bringing agentic functionality within workflows.

Other recent updates and announcements include:

► **AI Prompt Rules**

Laserfiche introduced AI Prompt Rules, which enable users to send a message to an AI service from Laserfiche or a Web Service Connection and receive a response. These rules can be used to route processes and validate form responses more effectively than with traditional deterministic rules.

Information governance capabilities in Laserfiche enable customers to retain a single source of record for content and metadata after business processes run.

► **AI-Assisted Tag and Template Classification**

AI-Assisted Tag and Template Classification provides users with a means to specify which tags to enable for automatic selection. Laserfiche AI is then able to determine which tags are appropriate based on document contents. This feature can be used to automatically flag content containing PII or other sensitive information so that security controls can be applied as soon as it is ingested into the repository.

Laserfiche introduced AI-Assisted Tag and Template Classification, which can be used to automatically flag content containing PII or other sensitive information.

► **Collections**

The Collections feature provides a user-specific way to easily group and access related documents, regardless of where they are stored, without modifying the existing folder structure.

► **Laserfiche Forms App**

The new Laserfiche Forms app enables users to interact with Laserfiche Forms directly on their mobile devices and complete assigned tasks, find and fill out forms, submit new form processes, and attach images.

► **Repository Fields Formulas**

Laserfiche launched Repository Field Formulas, which enable users to perform calculations, manipulate dates, and reference other fields using the same syntax as formulas in Forms fields, easing metadata management and consistency.

► **Laserfiche Deployment Manager**

The Laserfiche Deployment Manager is a new tool that can be used to move solutions from one Laserfiche Cloud account to another, or from a self-hosted system to Laserfiche Cloud. This simplifies the packaging and deployment of Laserfiche solutions.

M-Files

M-Files delivers an AI-powered, metadata-driven document management system that can be deployed on-premises or in the cloud. Capabilities cover industry-specific business process and document automation, information control, document search, collaboration, and security and compliance. The vendor uses AI and machine learning to identify and create connections to documents across platforms and repositories. M-Files Aino, the vendor's "AI fabric", uses generative and agentic AI to organize information, automate daily tasks, and deliver insights through natural language prompts. Customers can combine documents with enterprise data from other business systems to create a unified repository for AI searches, providing users with more context-

M-Files Aino uses generative and agentic AI to organize information, automate daily tasks, and deliver insights.

aware responses and actions. Permissions can also be automated, ensuring that AI does not disclose information that end-users should not be able to access.

M-Files natively integrates with the Microsoft 365 platform, combining the vendor's document management capabilities with Microsoft's collaboration, compliance, and AI tools, including SharePoint, Teams, Outlook, Purview, and Copilot. The vendor also offers prebuilt integrations with Adobe Acrobat Sign, Google Workspace, Salesforce, and SAP.

Recent updates and announcements include:

► **M-Files Workspaces**

In November 2025, M-Files introduced M-Files Workspaces, an application and UX layer that is built on the vendor's context-first architecture and powered by M-Files' Aino engine. Workspaces give users quicker access to relevant content through role-based, personalized views. For example, users are given a unified view of all content related to a specific client, project, or process.

► **Microsoft Partnership Expansion**

M-Files launched new experiences for Microsoft 365 Copilot and Microsoft 365 Copilot Agent Builder, building on the vendor's partnership with Microsoft.

► **New Applications**

The vendor announced the launch of applications, including M-Files for Tax Advisory, M-Files for Quality, and M-Files for Contracts. The solutions provide organizations with more targeted, outcome-driven applications built for specific industries and business areas.

Automated permissions ensure that AI does not disclose information that end-users should not have access to.

Zoho

Zoho WorkDrive is an intelligent enterprise content management and collaboration solution that unifies content management, AI-driven intelligence, and governance capabilities, accessible through a web-based interface and dedicated mobile and desktop applications. WorkDrive is built to support organizations of all sizes, and its functionality can be configured to meet the needs of specific verticals, such as legal and manufacturing. The solution's functionality includes internal and external collaboration, document archiving, access permissions, data encryption, intelligent search, native e-signatures, and workflow automation. It also includes a built-in office suite that includes Writer for word processing, Sheet for spreadsheets, and Show

for slide presentations, enabling real-time co-authoring. WorkDrive Snap delivers asynchronous video and voice communication capabilities, reducing reliance on formal meetings. WorkDrive's primary differentiator remains its deep integration and interoperability with Zoho business applications, enabling unified search and storage. The vendor also offers integration with more than 1,000 third-party solutions.

Zoho WorkDrive offers deep integration and interoperability with Zoho business applications for unified search and storage.

Zia AI is present throughout WorkDrive and enhances search capabilities, as well as content and image generation. Zia also powers intelligent document processing (IDP), automated transcription, and file summarization. Organizations can also take advantage of workflow automation within WorkDrive using a no-code workflow builder. Security remains a key focus for Zoho, with advanced data loss prevention (DLP) capabilities, granular audit trails, and secure data centers.

Recent updates and announcements include:

► **Zoho MCP Integration**

Zoho WorkDrive is now integrated with Zoho MCP, the vendor's AI orchestration platform designed to connect applications and agents through a unified execution layer. Zoho MCP standardizes context and action across platforms, enabling AI agents to interpret intent and complete complex workflows based on natural-language prompts.

► **Natural Language Querying**

WorkDrive added the ability for users to ask natural-language questions within PDFs, images, audio, video, and Zoho-format files and gain contextual answers via Zia. The platform can also surface the content users most likely need to see based on activity patterns, access history, and team interactions.

► **Custom Fields in Data Templates**

Organizations can now create more than 1,000 custom fields in Data Templates, with up to 1,000 of them searchable. Data Template usage can also be restricted to specific users or groups.

► **Zia Transcription Enhancements**

Zia can now transcribe and summarize audio and video files, including Snap recordings, to make media content more organized and searchable.

► **Cross-boundary Process Automation**

Zoho introduced cross-boundary process automation with support for external parties, enabling them to participate in workflows and trigger predefined automations.

► **Workflow Enhancements**

Workflows now support Deluge scripting through custom functions, enabling users to build conditional logic, trigger cross-system updates, and coordinate tasks across multiple applications.

Zoho introduced cross-boundary process automation with support for third parties, enabling external stakeholders to participate in workflows.

Experts

Experts in the Value Matrix include DocuWare, Hyland, and OpenText.

DocuWare

DocuWare is a content services provider with solutions built for rapid, secure access and flexible user configuration, focused on delivering quick time-to-value. The vendor's solutions provide functionality for document capture and management, workflow automation, and metadata management and indexing. AI is also leveraged for advanced capture, extraction, and classification of both structured and unstructured content. Current AI features include DocuWare Aura, DocuWare Intelligent Document Processing, and DocuWare Intelligent Indexing. DocuWare also offers preconfigured solutions for specific uses, such as invoice processing and employee management. The vendor's products can be deployed in the cloud and on-premises, with feature parity across deployment types. From an extensibility perspective, DocuWare offers pre-built connectors, iPaaS app connectors, and custom API development to simplify integration with more than 500 business systems, including HCM, CRM, analytics, and ERP platforms.

DocuWare's current AI offerings include DocuWare Aura, DocuWare Intelligent Document Processing, and DocuWare Intelligent Indexing.

Designed specifically for the needs of midsize organizations, DocuWare is able to scale to meet the needs of larger enterprises due to its advanced workflow automation and content management capabilities. This makes it an attractive choice for midsize, growing organizations. The vendor's solutions are also used across more than 200 countries, with support for more than 24 languages.

Recent updates and announcements include:

► **Workflow Insights**

DocuWare introduced workflow insights through data export, APIs, and BI connectors, enabling users to gain visibility into execution metrics such as cycle time, bottlenecks, and error rates.

► **Browser-native Workflow Designer**

The vendor has delivered a fully browser-native workflow designer, which enables workflow creation, editing, and deployment without a desktop client. The designer includes drag-and-drop modeling, visual validation, and improved usability.

► **UI Refresh**

The new DocuWare user interface features a modern, user-friendly UI with an attractive design built on WCAG 2.2 AA accessibility standards, offering optimized usability through re-envisioned core solutions, including a universal search across all file cabinets, a completely redesigned clip/staple and version management experience, and a new centralized workflow overview.

► **Mobile App**

DocuWare launched a new Mobile App, enabling managers and knowledge workers to review and approve tasks from their mobile devices based on a new user experience.

► **AI-powered Document Classification and Extraction**

AI-powered document classification and extraction is now available embedded in DocuWare with Generative Extraction for ZeroShot extraction and Master Data Matching

► **DocuWare Aura**

DocuWare Aura is a built-in AI assistant that provides secure, easy-to-use direct access to your file cabinets, instantly finding and summarizing information to support daily tasks and decision-making.

DocuWare has launched a fully browser-native workflow designer, enabling workflow creation, editing, and deployment without a desktop client.

Hyland

Hyland is a global provider of intelligent content solutions for complex, regulated, and document-intensive organizations. Its portfolio includes Alfresco, Nuxeo, OnBase, and Perceptive Content, with the Hyland Content Innovation Cloud platform, introduced in 2024, serving as an intelligence and services layer that can connect to and govern content across existing repositories without requiring migration, offering artificial intelligence, process automation, and context-aware applications. Features span AI-native services, including Content

Intelligence, Process Intelligence, Application Intelligence, Application Development, Content Federation, and Governance and Security. Hyland Knowledge Discovery is a solution that uses natural language prompts, AI agents, and retrieval-augmented generation (RAG) to simplify and streamline search. Additionally, Hyland Automate introduces a chat interface that enables users to build and orchestrate automated workflows from natural-language prompts. Hyland products are designed for the needs of complex, regulated, and document-intensive environments across industries such as healthcare, financial services, manufacturing, retail, and the public sector.

Hyland has expanded AI-enabled content services across its platform and product portfolio, including intelligent document processing (IDP), knowledge discovery, including model-agnostic AI capabilities with multi-model orchestration across commercial and customer-provided models, AI-assisted classification, content enrichment, and agentic document processing capabilities embedded within workflows, content processing, and decision automation. The vendor has also continued to enhance the Content Innovation Cloud, in addition to its core content platforms, to support operational content management across hybrid, cloud, and federated content environments, low-code workflow building, intelligent automation, and enterprise content services modernization. This includes expanded knowledge discovery, AI-assisted content understanding, low-code forms, digital workspace improvements, and collaboration enhancements. The vendor also offers deep integration via APIs, event frameworks, and more than 50 connectors with business systems, including Microsoft 365, SAP, and Salesforce.

Other recent updates and enhancements include:

► **Federated Content Access**

Hyland has enabled federated access to content across distributed repositories and enterprise systems, enabling customers to connect, govern, search, and act on content without requiring migration, while enabling unified governance, search and action across systems.

► **Industry-Specific Solutions**

The vendor has expanded solutions that apply content services, automation, and AI to industry-specific workflows including pre-built, domain-specific solutions and agentic workflows tailored to regulated industries, such as insurance claims and underwriting, accounts payable automation, case management, compliance

Hyland products are designed for the needs of organizations operating in complex, highly regulated, and document-intensive environments.

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processes, and domain-specific content intelligence embedded into operational workflows.

OpenText

OpenText is a provider of content and information management systems, with functionality that spans content management, enterprise governance, and records management with built-in AI, reporting, and analytics capabilities. The OpenText Core Content platform runs on a multitenant cloud and includes a range of OpenText Core SaaS applications that can be added and integrated with existing OpenText solutions on an as-needed basis. This approach offers customers enhanced flexibility, quicker time-to-value, and the opportunity to incrementally increase the ROI of OpenText solutions, such as OpenText Extended ECM, OpenText Content Suite, and OpenText Documentum, over time.

The vendor has continued to invest in AI capabilities, adding features such as Content Aviator, an embedded AI assistant that enables users to surface insights from documents and find specific information through natural language prompts. The vendor also offers OpenText Knowledge Discovery, an AI/ML-based solution that extracts, analyzes, and organizes unstructured data.

OpenText has a strategic partnership with Google, establishing the Core Content platform as a service on Google Cloud. The vendor also offers pre-built integrations with solutions from enterprise software providers, including SAP, Salesforce, and Microsoft.

Recent updates and announcements include:

► SAP Certification

In November 2025, OpenText announced its Core Content Management for SAP solutions achieved SAP S/4HANA Cloud Public Edition certification.

Accelerators

Accelerators in the Value Matrix include IBM, Revver, and Rocket Software.

IBM

IBM FileNet Content Manager is a cloud-native, AI-powered content services solution with functionality that spans document classification and processing, metadata management, governance and security, and

OpenText delivers content and information management systems that span content management, enterprise governance, and records management.

OpenText Knowledge Discovery is an AI and machine learning-based solution that extracts, analyzes, and organizes unstructured data.

robotic process automation (RPA). The solution can be deployed in the cloud, on-premises, or in hybrid environments. IBM's watsonx AI engine is built into the solution and can automatically classify documents and extract metadata. It can also extract content and workflow data for data mining and data science use cases. IBM Content Assistant is a prebuilt AI-powered assistant that enables users to generate summaries from documents and gain answers from data across the repository through natural language prompts. Responses through Content Assistant are also enriched with retrieval-augmented generation, improving reliability.

IBM's watsonx AI engine, built into FileNet Content Manager, can automatically classify documents and extract metadata.

Revver

Revver is a content services platform that focuses on AI-powered intelligent document operations to automate document-intensive business processes. The solution is built with quick time-to-value in mind, combining workflow automation with a no-code administration experience to reduce reliance on IT and avoid long implementations. In 2025, Revver released a new, next-gen metadata framework that simplifies setup and management while supporting automation, reporting, and insights. The vendor's Smart Extract AI feature is deeply embedded in the platform and can automatically classify content and extract metadata from documents, including handwritten and semi-structured files. Workflow automation in the solution can be triggered by this metadata, and workflows can automatically update fields and adapt to document context. As innovation continues, Revver remains committed to security and governance, offering retention controls, audit trails, and advanced search capabilities designed for organizations in regulated industries.

Revver prioritizes quick time-to-value, combining workflow automation with a no-code administration experience.

Recent updates and announcements include:

► Smart Extract Enhancements

Revver expanded its Smart Extract capabilities with Smart Hints, which enable organizations to provide contextual guidance for metadata extraction, classification, and field recognition. The vendor also launched Smart Summary, which uses generative AI to create document summaries directly within the platform.

► Dynamic Governance

Dynamic Governance is a new offering that combines AI-driven metadata capture with automated governance controls to give organizations more control over retention policies, protections, and scheduled actions.

► **Folder Mapping App**

The vendor launched the Folder Mapping App to help customers automate document ingestion from desktop folders, network folders, and systems that export files to shared locations.

► **Workflow Automation Expansion**

Revver expanded its workflow automation capabilities with more intelligent metadata-driven routing, dynamic destination matching, automated document request delivery, and in-process workflow editing.

► **Automatic Redaction of Sensitive Data**

In addition to credit card numbers, phone numbers, and email addresses, Revver can now automatically detect and redact Social Security numbers in documents.

Revver launched its Folder Mapping App, enabling customers to automate document ingestion from desktop and network folders, as well as systems that export files to shared locations.

Rocket Software

Rocket ContentEdge (formerly Rocket Mobius) is an enterprise content services platform designed for organizations with complex information governance requirements, often operating with hybrid legacy-modern technology architectures. Primary capabilities of the platform span generative AI and search, content modernization, and unstructured data management. The solution provides a hybrid modernization strategy for enterprise infrastructure and applications, either in the cloud, on-premises, or on a mainframe, without disruption to workflows or records integrity. The platform's focus is on transforming historical data from difficult-to-access repositories into actionable insights, using intelligent document processing (IDP) and generative AI with a focus on security and governance. For example, the ContentEdge Chat powered by EVA feature provides users with context-aware answers to questions that comply with existing governance structures. Rocket EVA is an AI-powered, agentic platform that delivers precise, end-to-end operational diagnostics across core systems. The vendor offers scalable policies for retention, redaction, and access control, making AI adoption a feasible reality for customers in heavily regulated environments and industries.

Rocket ContentEdge delivers a hybrid modernization strategy for enterprise infrastructure and applications that minimizes disruption to workflows and records integrity.

Recent updates and announcements include:

► **Rocket ContentEdge Chat Enhancements**

Rocket ContentEdge Chat was enhanced with feedback loops and customizable large language model (LLM) prompts.

► **IAM Support**

Rocket ContentEdge added support for IAM technologies, such as CyberArk.

► **Marketplace Integrations**

Rocket ContentEdge is available on the AWS marketplace, and the vendor's Intelligent Content Services for SAP Solutions is available through the SAP store.

► **Advanced AI Capabilities**

The vendor has launched advanced AI capabilities, including ContentEdge IDP Extraction, which is able to automatically extract structured metadata from complex documents using example-driven AI models.

► **Rocket Content Automation Updates**

Rocket Content Automation includes an updated design environment, agentic AI tasks, instant test-runs, directory monitoring, and MCP integration to extend automation across systems.

► **Next-generation User Interface**

The vendor launched its next-generation user interface, which includes enhanced interactive search, and document and email preview capabilities.

Rocket ContentEdge now includes advanced AI capabilities, including ContentEdge IDP Extraction.

Core Providers

Core Providers in the Value Matrix include AODocs, Digitech Systems, Microsoft, Newgen, and Square 9.

AODocs

AODocs is a cloud-based content services provider that offers features for document archiving, indexing, and retention, along with process automation, electronic signatures, file recovery and conversion, version control, collaboration, and security and compliance. The vendor's solution is available through the Google Cloud marketplace and offers deep integration with Google Workspace. However, the vendor also has pre-built integrations with other enterprise software providers, including Salesforce, Microsoft, and SAP. AIDA, AODocs' AI assistant, enables users to get answers to content-related questions in the repository via natural language queries. AI is also present across the vendor's process automation capabilities, and can automatically extract data, classify documents, summarize content, and provide translations.

AODocs' AI assistant, AIDA, enables users to receive answers to content-related questions via natural language prompts.

Recent updates and announcements include:

► **SAP Certification**

AODocs announced that its platform achieved SAP Cloud ERP (S/4HANA) certification.

► **External Portals**

AODocs launched External Portals, a new capability that enables organizations to share with and collect documents from external stakeholders without having to give them access to internal systems. Interactions are captured with a full audit trail, and documents remain governed within the AODocs platform.

► **Microsoft Collaboration**

The vendor announced a collaboration with Microsoft, providing native support for SharePoint embedded. The move enables organizations to manage documents through AODocs while storing files within their own Microsoft 365 environment.

► **Availability within Google's Gemini Enterprise Agent Gallery**

Also in April 2026, AODocs announced its AI agent would be moving into the Agent Gallery inside Google's Gemini Enterprise.

AODocs launched External Portals, a new capability that enables organizations to share with and collect documents from external stakeholders without giving them access to internal systems.

Digitech Systems

Digitech Systems delivers content management solutions that can be deployed on premises, in the cloud, or in hybrid environments. The vendor's products span ImageSilo, PaperVision.com, PaperVision Enterprise, and Sys.tm, meeting the specialized needs of organizations across different sizes, industries, and requirements. Sys.tm, the vendor's newest cloud-based offering, delivers information management and automation capabilities through a microservices architecture. This approach enables organizations to start with only what they need and incorporate more functionality as requirements change. Throughout 2025, Digitech Systems launched Sys.tm Flows and Sys.tm Intelligence, respective tools for business process automation and AI. The vendor also offers Generative AI querying within Sys.tm Intelligence, and users can embed GenAI actions such as document summarization, report creation, and content generation, directly within business processes.

Sys.tm, Digitech Systems' newest cloud-based offering, delivers information management and automation capabilities through a microservices architecture.

Microsoft

Microsoft SharePoint includes features that span document storage, content management, and collaboration. These capabilities are part of the Microsoft Syntex intelligent content services layer, which facilitates secure creation, sharing, and management of content across an

organization. Syntex provides users with the ability to create AI builder models in SharePoint for both structured and freeform document processing. Each SharePoint site includes an AI agent that has contextual understanding of the content within it. Users can also create and share custom-built agents, with guardrails to ensure that they only access relevant information.

Compliance is updated regularly, as the solution runs on Microsoft's cloud architecture. SharePoint also natively integrates with Microsoft products, such as Office 365, OneDrive for Business, and Teams, making it an attractive choice for organizations with a substantial Microsoft ecosystem.

Recent updates and announcements include:

► **Agentic AI Expansion**

Microsoft has introduced new agentic experiences in SharePoint, enabling teams to plan, create, and iterate on solutions collaboratively, with support from AI.

Microsoft's Syntex intelligent content services layer provides users with the ability to create AI builder models in SharePoint for structured and unstructured document processing.

Newgen

Newgen is a provider of intelligent orchestration solutions for unified digital transformation. The vendor's NewgenONE platform broadly covers capabilities for intelligent process automation, contextual content services, low-code application development, agentic AI, and data science. For content management, features include content integration, classification, search, extraction, and lifecycle management. Process automation functionality spans business rules management, dynamic case management, RPA, and process modeling, orchestration, and insight delivery.

AI agents built on the NewgenONE platform are context-driven and can access organizational knowledge stored within the solution to help users improve decision-making. The vendor offers agents preconfigured for specific vertical use cases, such as invoice extraction, loan collections, and credit decisioning. For more specific use cases, organizations can access low-code capabilities to create and manage customized agents.

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Square 9

Square 9 offers an AI-powered intelligent information management platform, with features for document capture, indexing, search, and business process automation. Automation capabilities can accelerate document-based processes across use cases such as accounts payable,

accounts receivable, human resources, and contract management. The vendor also embeds AI across capture, workflow automation, and document management to reduce manual tasks and touchpoints.

Square 9 delivers solutions tailored to the needs of various departments and specialized verticals, including automotive, agriculture and farming, manufacturing, and healthcare. From a security standpoint, the vendor offers secure document storage, detailed audit trails, role-based access, and retention controls. The vendor also recently renewed its SOC 2 and HIPAA certifications.

Square 9 embeds AI across capabilities for data capture, workflow automation, and document management.