FINANCIAL SERVICES | SOLUTION OVERVIEW

ONBASE INTEGRATION FOR EPISYS

Episys users never have to leave the core to interact with content

See a complete view of the member

Increase productivity with innovative intelligent automation

View and archive information directly from your core credit union solution

With the OnBase enterprise information platform, credit union employees, from loan officers to branch staff, enjoy both the efficiency of digital workflow business processes and easily accessible content. Unfortunately, the need to manually update information from OnBase into the core can pose a challenge to day-to-day productivity. Manual input is time consuming and opens the door to errors and omissions.

With Hyland's new OnBase Integration for Epysis, users no longer need to post information manually to the core. OnBase syncs information, like transactions, member

information, tracking records and more, automatically to the related Episys record. The integration also gives users the ability to view and archive documents directly from your Episys system. And with OnBase, credit unions benefit from the robust features and functionality that a content services platform delivers.

EPISYS USERS NEVER HAVE TO LEAVE THE CORE SOLUTION

Our purpose-built integration, using Jack Henry's SymXchange system, provides users with the ability to view and archive documents and information directly from the core, as well as update the core when performing certain functions in OnBase. Episys users never have to leave the core to update data manually in another system on another screen.

Users also enjoy the breadth and depth of OnBase content services. Business processes like accounts payable, human resources and contract management run more efficiently. This allows users to capture, process and retrieve the information they need, when they need it. Quickly finding documents, data and information is a competitive advantage and empowers employees to respond quickly to member requests.

SEE A COMPLETE VIEW OF THE MEMBER

Serving as a content services hub, OnBase smartly surfaces content in context by connecting data and systems across the credit union. By providing users with easy, secure access to complete information — anytime, anywhere, on any device — we enable credit unions to digitally transform and facilitate more responsive, meaningful interactions with members.

OnBase helps improve cross-office, departmental productivity by breaking down information silos, supporting collaboration and streamlining processes across the credit union. It delivers critical content in context, giving users visibility into the information they need and empowering users with complete information to make quick and accurate decisions.

INCREASE PRODUCTIVITY WITH INNOVATIVE INTELLIGENT AUTOMATION

Intelligent automation and workflow solutions anticipate the needs of users and customers. They help reduce costs and improve speed, accuracy and transparency by minimizing repetitive, manual tasks and removing bottlenecks. This allows employees to focus on high-value tasks and develop more meaningful, relevant connections with the members they serve.

Hyland

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