

# WHAT CAN YOU DO WITH ONBASE?



Hyland®

# Introduction

OnBase automates your processes, manages your important business content and works with your other applications to provide users with a complete view of the right information, where and when they need it. OnBase gives you visibility into the status of processes, documents and information, and automates and supports retention requirements.

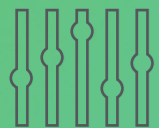
## WITH THESE BENEFITS, ONBASE:



Transforms internal processes and the customer experience — continually improving service levels to your employees, customers, patients, constituents, students, vendors and partners



Reduces operating costs by automating predictable decisions and providing useful tools to manage all surrounding tasks, activities and information



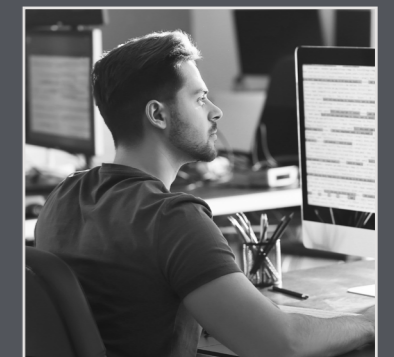
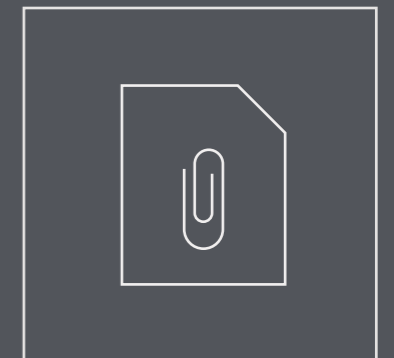
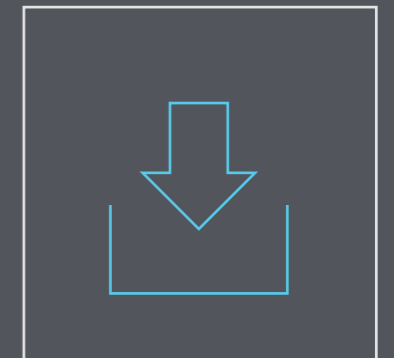
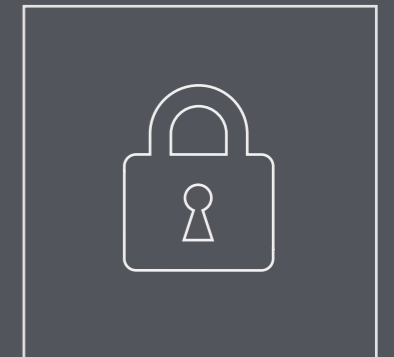
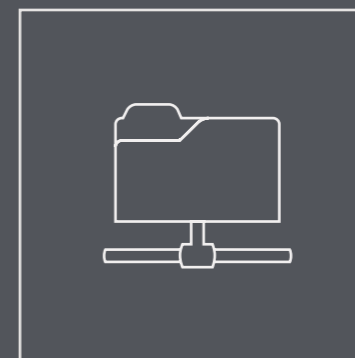
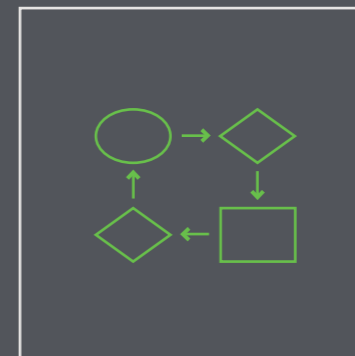
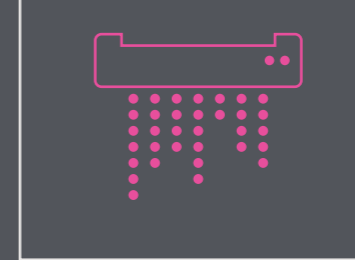
Minimizes risk with a secure, protected environment for your work

# Overview

## THE ONBASE PLATFORM

OnBase is a scalable content services platform that manages the entire content lifecycle, from capture to disposition. Flexible functionality can scale across multiple departments, integrate with virtually any business application, transforming internal processes and the customer experience.

OnBase helps users work smarter by surfacing content in the context of a business process and giving them all of the tools they need to interact with it digitally. From robust editing and collaboration tools to advanced workflows, process automation and configurable applications, OnBase helps improve user productivity and increase customer satisfaction. And by automating content lifecycle management, OnBase also helps your organization reduce risk by simplifying compliance with industry and regulatory requirements.



# Features and benefits

## CAPTURE INFORMATION FROM ALMOST ANY SOURCE

Regardless of format or location, OnBase captures your documents and extracts necessary information, automatically sending it to all relevant systems. It then organizes them into a single system with minimal human interaction — removing tedious and error-prone manual data entry.

With OnBase, organizations can take advantage of powerful multi-channel capture capabilities:

- On-demand and batch scanning paper documents.
- Importing electronic documents and information.
- Extracting data directly from documents and sharing it with other systems.

## AUTOMATE PROCESSES ACROSS THE ORGANIZATION

OnBase helps you decrease processing time, reduce errors and increase employee productivity by optimizing your processes. Following your business logic, OnBase can automate predictable tasks while delivering exceptions and decisions to the right people, at the right time. Leverage OnBase to send notifications, enable approvals from mobile devices and load balance important work — increasing efficiency and keeping processes flowing.

OnBase is your ultimate toolkit for process automation:

- A highly configurable workflow engine that includes a variety of built-in rules and actions to automate complex business processes.
- Customizable forms enable you to easily tailor a form's look, feel and functionality, including strategic options like required fields, data validation and calculations with instant results.
- Powerful flexibility provides the ability for business users to configure rules to evaluate documents and dynamically assign approvers — streamlining and simplifying the document approval process.

## SUPPORT CASE-DRIVEN WORK

To thrive in today's business environment, organizations need a new way to work — and solutions that support dynamic and often unpredictable processes.

OnBase simplifies case management by managing all the data, tasks, documents, processes and collaboration surrounding unstructured cases — like service requests, investigations and incidents — in a single solution. Whether they are working on a customer relationship, a project or an issue, OnBase gives your employees a complete view of the case and all the information they need to complete their work. With OnBase case management capabilities, they can spend less time on paperwork and more time on delivering customer value.

At the same time, OnBase also increases visibility across all cases — equipping you to monitor completion, make improvements, standardize best practices and increase effectiveness over time.

## ENABLE COMPREHENSIVE CONTENT MANAGEMENT

Your organization has a wide variety of business-critical content, from invoices to contracts to video files, that's required to support key processes, drive operations and serve customers. With OnBase, you organize, manage and optimize critical content originating across your organization, providing users with a complete view of the information they need, when they need it.

Leverage OnBase content management capabilities to:

- Work digitally with business content, regardless of format and where the content currently resides.
- Empower users to easily search for documents while leveraging digital folders and file cabinets to keep content organized.
- Effectively handle revisions and versions to ensure users access the most current content.
- Use notes, markups and electronic signatures, supporting effective collaboration and streamlining processes.
- Provide a complete audit history of actions taken on key content for compliance.
- Rapidly distribute the right documents to the right employees for required reading and training, easily tracking and proving employee acknowledgments.

## CONFIGURE YOUR OWN APPLICATIONS WITH A LOW-CODE PLATFORM

OnBase serves as a low-code, rapid application configuration platform that minimizes the need for costly custom coding and multiple point solutions from different vendors. With OnBase, you can replace aging database applications like Access and Lotus Notes while filling in the functionality gaps that exist between your line-of-business systems. You can also point-and-click configure a variety of solutions — from traditional forms and workflow solutions, to complete business applications using tools like checkboxes, radio buttons and drop-down menus.

## INTEGRATE WITH KEY SYSTEMS

OnBase integrates with your key applications via a variety of integration options:

- **Purpose-built integrations:** Seamlessly feed information and documents between OnBase and other applications with pre-built connectors for many widely adopted applications including Salesforce, SAP, Workday, Microsoft Office, Outlook and Infor.
- **Screen-level integrations:** With a point-and-click configuration tool, OnBase empowers your users to access documents, create forms and even begin OnBase processes directly from the screens of other business applications.
- **Data-level integrations:** OnBase offers an enterprise integration platform to coordinate an instantaneous, reliable exchange of data between your applications. By integrating your applications at the data-level, you ensure that the data across all your systems is consistent and up-to-date.

## MONITOR AND IMPROVE PROCESSES

OnBase provides your users, administrators and auditors with the dashboards, logs and reports they need to have accurate and timely insights into the status of your processes, the completeness of your records and the health of your system. Easily configurable reporting not only provides visibility into your processes but also helps identify missing, aging or expired content, and reduces disruption during audits and eDiscovery.



## IMPROVE DATA SECURITY AND COMPLIANCE

OnBase is developed with security as a top priority and provides a full set of security features to help you protect your business and customer data from the moment it enters your organization:

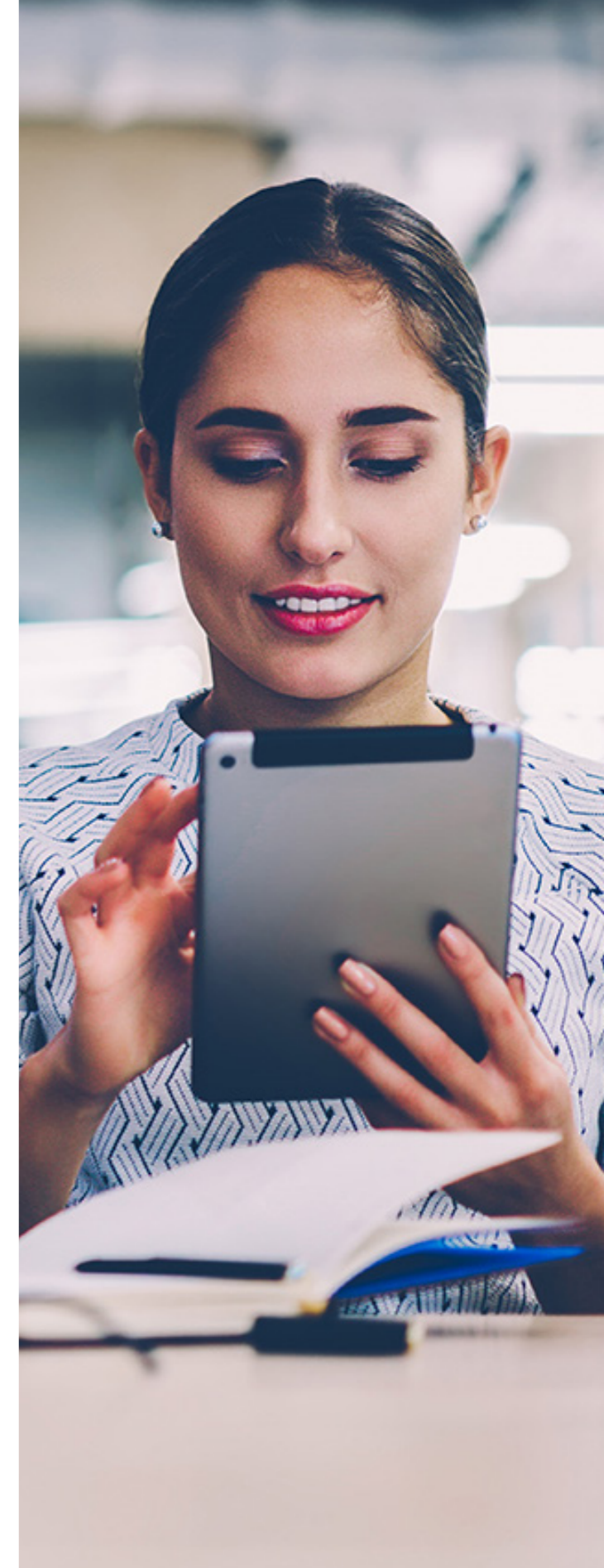
- **Granular access controls and group policies** allow administrators to fine-tune access to information based on user roles or corporate policies.
- **Automated records and retention management** automates the process of declaring documents as records, placing holds and performing retention tasks like automatic deletion or archival, which reduces exposure in case of a breach.
- **Data encryption** adds an extra layer of protection to your data at rest, in transit or in use, making it unusable to attackers in case of a breach.
- **Redundant configurations** support your business continuity and disaster recovery programs, and reduce or mitigate the impact of natural disasters, ransomware and DDoS attacks.

OnBase also helps you meet compliance requirements by standardizing and automating your data handling processes, and by securely storing, protecting and destroying your information in accordance with applicable regulations.

## POWER UP WITH THE HYLAND CLOUD

Want to leverage the industry-leading capabilities of OnBase on a cloud hosting architecture that fits right in with your technology ecosystem? The Hyland Cloud is a reliable and secure hosting platform that was purposefully built for content and information management, and continues to evolve to support your information management needs — today and into the future:










- **Mature platform** delivering content services in the cloud since 2004 and serving more than 1K customers today.
- **Dependable performance** with 99.99% availability of data, thanks to our aggressive data redundancy and backup protocols.
- **Reliable and scalable content services** with more than 12 billion documents managed in the cloud.
- **Available anywhere you need it** with information hosted in one of our co-located data centers around the globe or in a public data center operated by one of our accredited partners. Delivered in a managed service model, the Hyland Cloud supports customers in more than 26 countries.
- **Protected** by layers of security including platform architecture, robust identity and access management controls, data center security, and data encryption at rest, in transit and in use.
- **Compliant co-located data centers** meet or exceed required security standards including SOC 1 and 3 or 2 audits, ISO 27001 (or local equivalent) certified, and TIA Tier 3 or 4.





## ENHANCED CAPABILITIES TO MATCH YOUR NEEDS

While OnBase comes fully equipped with the many features you need to confidently manage your content and processes, we know that sometimes you need to add specialized functionality as part of your business solution. Here are just some of the additional Hyland offerings that work seamlessly with OnBase:

	 Capture	 Content management	 Process automation	 Customer communications management	 Collaboration	 Case management	 Reporting and analytics	 Search	 Retention and records management
OnBase	✓	✓	✓	✓	✓	✓	✓	✓	✓
ShareBase		✓	✓		✓				
Brainware	✓		✓						
Content Composer			✓	✓					
Enterprise Search							✓	✓	
Governance rules as a service			✓						✓

Ready to take your digital transformation to the next level? By consolidating all of your important content on one modern content services platform, OnBase helps you remove information silos, improve user and customer experience, and at the same time better protect your information.

[Learn more at Hyland.com](https://www.hyland.com)

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