



# DISCOVER ONBASE

**OnBase**<sup>®</sup>  
by Hyland

# ONBASE / PUTS YOUR WORLD OF INFORMATION IN YOUR HANDS



## What can you do with OnBase?

OnBase® by Hyland automates your processes, manages all of your important business content in one secure location and works with your other applications to deliver your information whenever – and wherever – you need it. Once you have your information under control, you have total visibility into the status of processes, documents and information – while also supporting retention requirements. With these benefits, OnBase:

### Improves your level of service

- Allows customers, constituents and students to complete forms and make requests online
- Provides real-time visibility into the status of requests, transactions and orders
- Reduces time spent searching for documents and information

### Reduces operating costs

- Speeds processes by automating predictable decisions and providing useful tools to manage all surrounding tasks, activities and case work
- Increases productivity by providing instant access to content and processes from anywhere, even a mobile device
- Eliminates the costs of printing, shipping and storing paper by electronically capturing content

### Minimizes risk

- Provides easy controls access, simplified enforcement of security policies and automated tracking of actions taken
- Facilitates reporting and auditing of required and missing information
- Automates retention and records management requirements

**“Because of the time we save with OnBase, we now have access to the information we need in real time, allowing us to provide better care and see more clients.”**

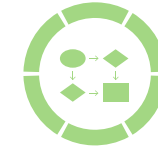
Nomonde Ngada, project manager, IT  
mothers2mothers

## Solutions as unique as your organization

With OnBase, it's easy to design solutions that meet your organization's specific needs. These six categories will help you understand how OnBase manages information from the moment it's received, all the way until it's destroyed.



Capture



Manage



Access



Integrate



Measure



Store

OnBase speeds up processes and reduces costs by capturing important information into one system; managing data, documents and processes; integrating with your existing systems; providing instant access to everyone who needs it; giving visibility into your processes and system performance and securely storing, protecting and destroying your information.

To help build your OnBase solution, Hyland, creator of OnBase, also provides deep industry expertise in many industries and departments. Some examples include:

### Industries .....

- |                                       |                              |
|---------------------------------------|------------------------------|
| Financial Services                    | Construction                 |
| Government (federal, state and local) | Transportation & Warehousing |
| Healthcare                            | Utilities                    |
| Higher Education                      | Mining                       |
| Insurance                             | Oil & Gas                    |
| Manufacturing                         | Agriculture                  |
| Wholesale Trade                       | Arts & Entertainment         |
| Retail                                | Services                     |
| Pharmaceuticals                       | Global Trade                 |

### Departments .....

- |                          |                  |
|--------------------------|------------------|
| Accounts Payable         | Customer Support |
| Accounts Receivable      | Human Resources  |
| Procurement & Purchasing | Legal            |

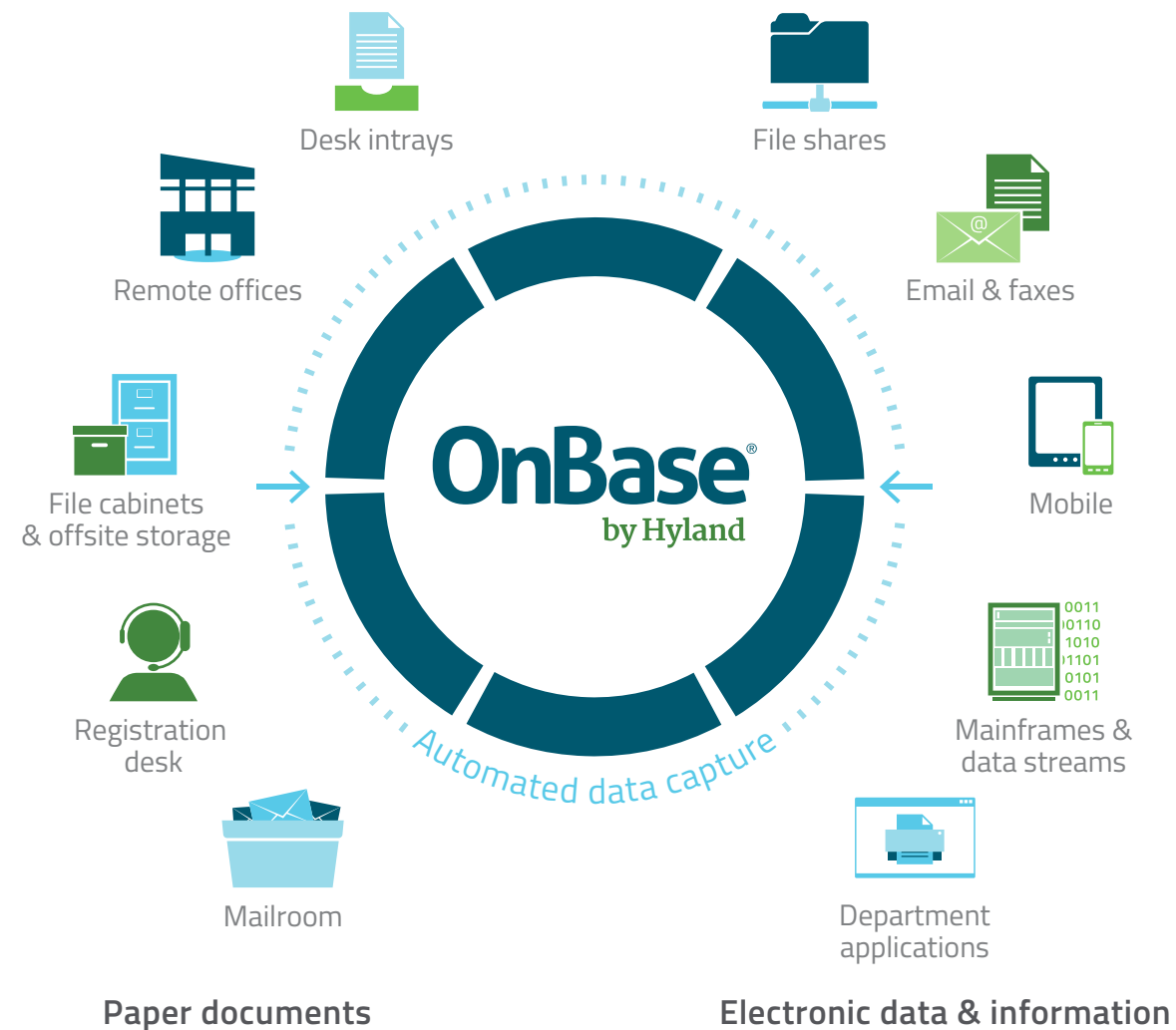
**“Members are everything to us. The number one benefit of OnBase is that it has helped us increase member satisfaction.”**

Sarah Lawson, IT specialist  
Alcoa Tenn Federal Credit Union

**“By choosing OnBase, we have a tailor-made archiving system that will enable the public to interact with historic records. For the first time ever, we will reveal a holistic, 360-degree view of the information.”**

Iain Standen, CEO  
Bletchley Park Trust

# ONBASE / CAPTURE



## Capture your documents and data into one system

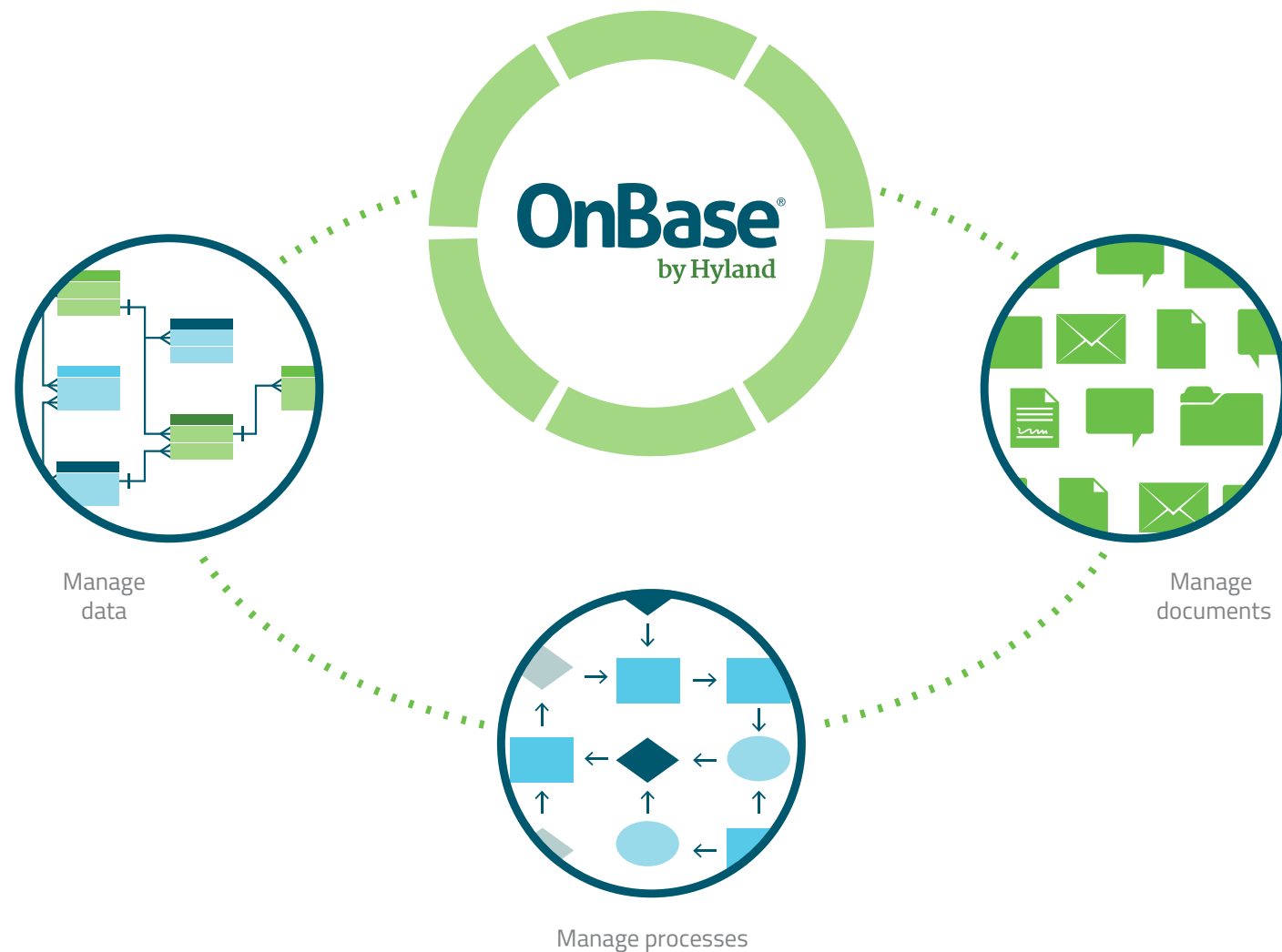
Regardless of format or location, OnBase captures your documents and the critical information they hold right at the source. It then organizes them into a single system with minimal human interaction – removing tedious and error-prone manual data entry.

Whether paper or electronic, OnBase captures almost any file type and quickly extracts necessary information, automatically sending it to all relevant systems.

- **Scan paper documents:** Capture a single page or thousands of documents directly from where you receive them, saving time and minimizing costs associated with transportation.
- **Import electronic documents and information:** Automatically capture electronic documents in their native format, directly from the applications you use on a daily basis. From CAD files to email messages to PDFs, OnBase ingests any file format. You can even use your mobile device to quickly upload photos and content while in the field, whether you are connected or offline.
- **Extract data from your documents:** While capturing documents, OnBase pulls the relevant data off the page, validates it against existing information and shares it with your other systems – saving time associated with manual data entry. The extracted data is then used to automatically index documents into OnBase, making them instantly accessible.

*“In capturing data from any specific document, the software sophisticatedly eliminates the need to manually enter data and as a result, reduces the number of man hours staff need to spend on menial tasks such as data entry.”*

Kevin Gregory, OCR consultant  
Capita



## Better manage your data, documents and processes

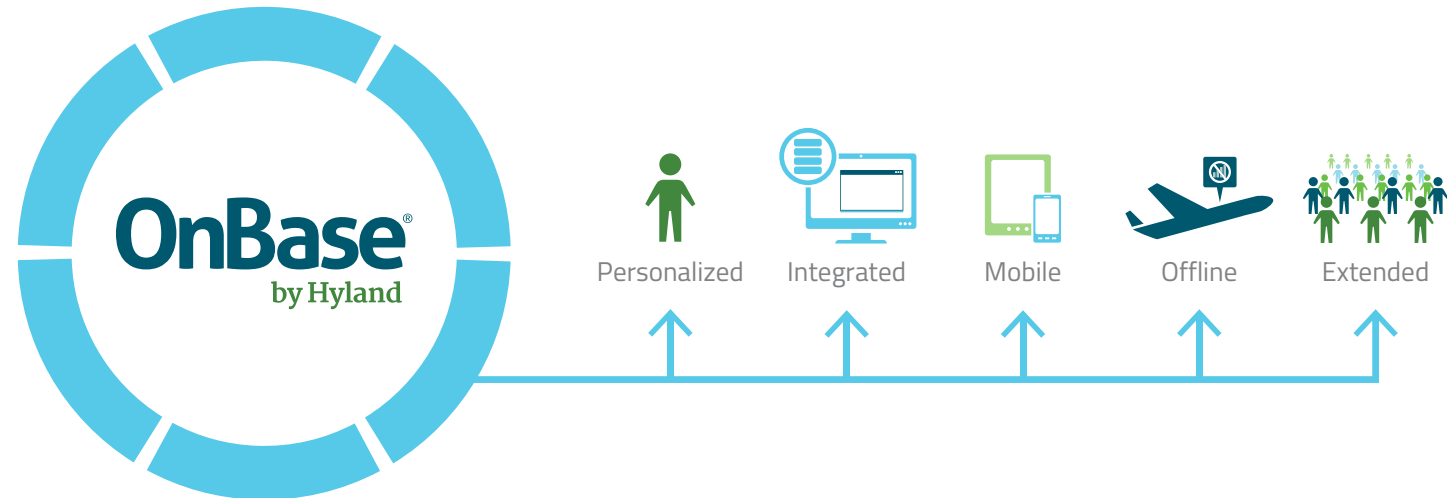
OnBase combines the ability to manage processes, documents and data in one system so your information flows seamlessly throughout your organization. Minimize process delays, data silos and disconnected documents and automate repetitive tasks while equipping workers to make better decisions.

Build content-enabled applications that support your requirements today and grow with you. Quickly create solutions tailored to your business problems without relying on costly custom coding.

- **Manage documents:** Work electronically with all critical content, regardless of format. Empower users to easily search for documents while leveraging digital folders and file cabinets to keep content organized. Effectively handle revisions and versions, electronically sign and automatically generate documents for distribution to customers and constituents.
- **Manage processes:** Decrease processing time and increase employee productivity by optimizing your processes. OnBase automates 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.
- **Manage data:** Create data-centric and case management applications with OnBase, replacing antiquated databases, shared spreadsheets and legacy systems. Minimize the need for custom-developed or off-the-shelf solutions for areas such as HR onboarding, vendor management and fraud investigation. Provide users with access to all data, documents, tasks and conversations that support a customer, case or project – from one interface.

*“The other vendors said we’d have to change our process to fit their software. OnBase was the only software that could fit to our processes and wouldn’t change how we already worked. By automating [just one] process with OnBase, we avoid \$30 million in costs each year.”*

Paul H. Alpaugh, director of UC Disbursements  
Pennsylvania Treasury Department



## Access your content easily, from anywhere

With OnBase, your information finds you and becomes instantly available to the people who need it, wherever they are, from almost any device or application. Empower your users to access content the way that makes the most sense for them – allowing them to work more effectively from the office, on the road or in the field.

By providing the right information at the right time, OnBase equips your users to make better decisions, effectively serve customers and keep processes flowing, whether you are deploying OnBase on-premises or in the OnBase Cloud.

With OnBase, provide access to information:

- **From a personalized, intuitive user interface:** Put the documents, forms, business processes and reports that are important right at users' fingertips.
- **While working in another business application:** OnBase integrates with other applications, such as your ERP system or Microsoft® Office products, equipping users to access content directly from their familiar screens.
- **While on the go:** Use OnBase mobile applications to instantly access your information, make decisions and monitor processes wherever you are – from an iPhone, iPad, Android or Windows phone or tablet.
- **When disconnected:** Give field workers the ability to retrieve, create and update documents, complete forms and upload photos while offline.
- **To those outside your organization:** Improve the experience of your customers, patients, constituents and students by allowing them to easily submit forms, track process status and access documents online.

*"They were blown away when they saw how much easier their lives just got...they were amazed; they thought it was fantastic."*

Tim Oliver, assistant director of IT/GIS  
Horry County

# ONBASE / INTEGRATE



## Integrate OnBase with your other applications

OnBase provides a variety of integration methods to equip users with instant access to all the information they need from their preferred application.

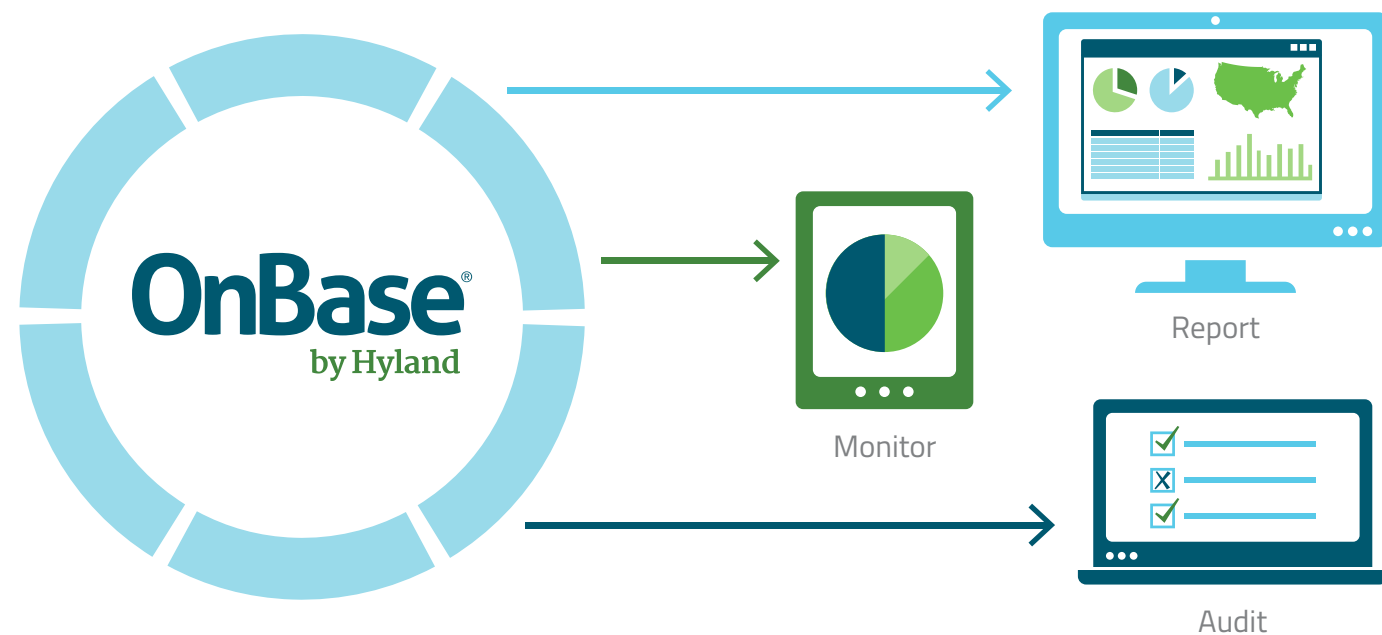
Leverage information from another application to automatically launch processes in OnBase – such as composing documents, filling out forms or triggering business workflows. That way, users make critical business decisions faster and with the most accurate information.

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

- **Purpose-built integrations:** Purpose-built integrations for many widely-adopted applications, including PeopleSoft®, SAP®, Microsoft Office®, Outlook®, ESRI®, Datatel® and Infor Lawson®. These specific integrations seamlessly feed information and documents between OnBase and the other applications.
- **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 its Enterprise Integration Server to coordinate an instantaneous, guaranteed 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.

*“With an ECM solution as the central point of integration, we’re able to bring users a consistent point of service and reduce the amount of time they spend flipping back and forth between different systems.”*

Mary Schmidt, business analysis & quality assurance manager  
Farm Bureau of Michigan



## Monitor your process and system performance

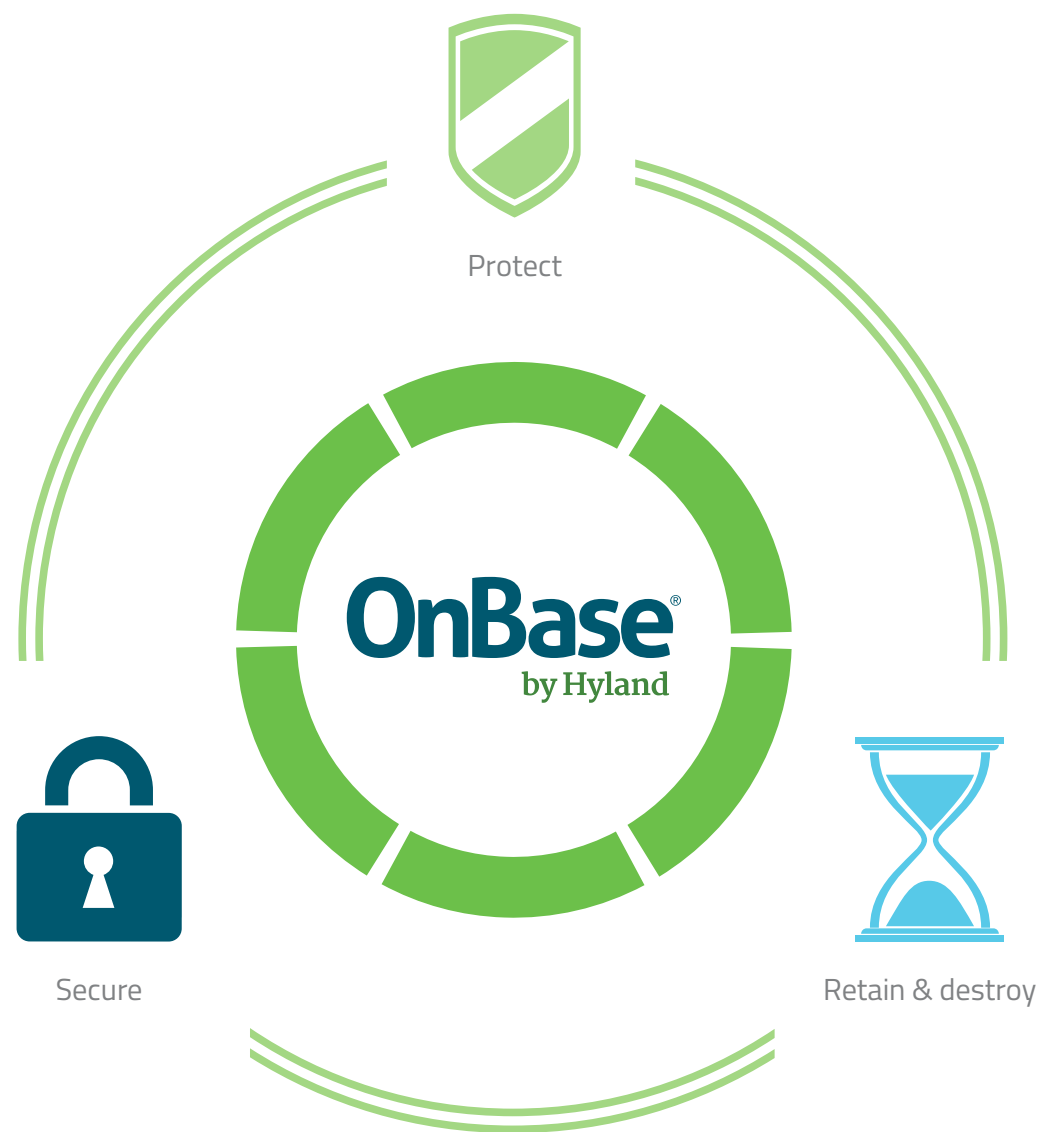
OnBase provides real-time insights into the status of your processes, the completeness of your records and the health of your system – allowing you to take action when and where it's needed. The system also facilitates audits and supports compliance initiatives by identifying the existence and accuracy of information.

With OnBase, you gain visibility into key content and processes.

- **Monitor:** OnBase provides immediate, actionable information about the status of business processes. With interactive reporting dashboards – available via web browser, Microsoft® SharePoint and mobile devices – managers and process owners proactively monitor processes and determine areas for improvement.
- **Audit:** Easily view what's in the OnBase system, as well as what's missing, aging or expired. OnBase also facilitates easier external audits by equipping auditors with access to content through a convenient web portal.
- **Report:** With comprehensive reporting capabilities, you have visibility into process status, outcomes and the health of the OnBase system. End users run the reports they need with an intuitive interface and without burdening IT or compromising system security.

*"OnBase lets us see exactly what is happening in our processes. When we find a problem, we can fix it before it gets out of hand."*

Marti Lattimer, content management manager  
Grinnell Mutual Reinsurance



## Securely store, protect and destroy your content

OnBase minimizes risk and supports compliance by securely storing, protecting and destroying your information in accordance with applicable regulations – without needing to purchase additional third-party software or hardware.

By consolidating all of your important content into one system, OnBase solves the problems associated with managing content across a variety of databases, systems and physical storage locations.

- **Secure:** Via powerful encryption, OnBase secures your important data when it's at rest, in motion and being accessed – supporting standards like PCI and DSS compliance. By working with your existing NT or LDAP authentication protocols, OnBase simplifies administration of your security policies while providing granular control over exactly who can access information and what they can do with it.
- **Protect:** OnBase protects your information by creating multiple electronic copies of each document on servers across different locations. Should the main file server become inoperable, OnBase automatically switches over to the next server in line, allowing continuous access. OnBase Cloud users benefit from having up to three duplicate copies of data in datacenters across multiple geographical locations for maximum business continuity.
- **Destroy:** OnBase simplifies the implementation of retention plans and policies. When content is ready for disposition, OnBase sends it for review or automatically destroys it according to your requirements.

*“Before OnBase, our DR plan was to back everything up on tape and keep one copy of the tape in the vault at our main location and a second in storage about five miles away. With OnBase managing our DR, I don't worry about anything.”*

Sarah Lawson, IT specialist  
Alcoa Tenn Federal Credit Union



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“Although there are larger companies out there that do what we do, we’re more effective and affordable. OnBase allows us to deliver a service that exceeds what our competitors can deliver.”

Darrell Statz, OnBase administrator & director of finance and support services  
Rural Wisconsin Health Cooperative

## Be confident in OnBase

Investing in any enterprise product is a long-term commitment. With OnBase, you can have confidence the product you choose today will meet your immediate needs and provide value long into the future.

### Configurable to meet your exact requirements with the lowest total cost of ownership

Whether through acquisition or development, the cost to go live with an application is only a fraction of the lifetime total cost of ownership (TCO). OnBase is designed to provide the lowest TCO possible through:

- **Configuration without code:** You don’t need to assign developers, database administrators or programmers to maintain an OnBase solution. OnBase is point-and-click configurable, allowing you to use checkboxes, radio buttons and drop-down menus to configure solutions. That means no expensive, time-consuming and difficult-to-maintain coding or scripting.
- **A single end-to-end architecture:** OnBase is a single product, not a brand representing a large portfolio of acquired products. All the components of your solution share the same underlying architecture, meaning you only have to maintain, upgrade and secure one system, not several disparate applications.
- **Ease of use for everyone involved:** OnBase is intuitive for your end users, minimizing the time and cost associated with training. Hyland is also committed to providing you with complete ownership of your solution, allowing you to make changes, expand into other areas and even build new solutions without relying on Hyland to do it for you.

## Built to meet your organization’s needs, long into the future

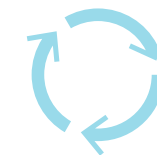
As your organization continues to grow, so does OnBase. Expand your use of OnBase as time and budget permit. You can easily create new solutions, increase volumes of information and add more users.



- **Requirements evolve:** OnBase provides a single platform to manage data, documents and processes. Our modular approach allows you to purchase only the specific functionality that you need. And because it all runs on the same infrastructure, adding new functionality is easy.



- **Protected, flexible and extendable platform:** With OnBase, you can be confident your data is protected while it’s at rest, in motion and being accessed. OnBase provides native security controls and seamlessly leverages your NT or LDAP authentication. Your information is also safeguarded from disaster with backups and server redundancy.



- **Continually updated:** OnBase supports a 64-bit database, suitable for storing up to 1 quadrillion documents. The OnBase system also never limits the number of keywords on a document, allowing you total flexibility as you add fields for document retrieval and configuration.

“The best thing about OnBase is the ease of deployment across multiple departments to optimize or automate processes.”

Kelly Gustafson, manager,  
eCommerce application support  
Redstone Federal Credit Union

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“The Hyland user community is always willing to share ideas and solutions. The knowledge base of the users is so vast, there hasn’t been a challenge they haven’t overcome.”

Andrew Weibel, senior vice president & Chief Technology Information Officer  
Lee Bank

## Support from the best ecosystem of experts in the industry

More than 3,500 customers have used OnBase for over a decade. These organizations originally invested in OnBase to solve an immediate problem. Ten years later – with solutions, organizations and available technology that are all very different – they continue to value their partnership with Hyland.



- **Expertise:** Hyland focuses solely on OnBase – it’s what we do. We also employ people with industry experience and certifications to ensure your organization receives support from industry experts.



- **Innovation:** In 1991, we imagined a new and smarter way to simplify the way people work. We built our solutions from the ground up, shoulder to shoulder with our partners and customers to give organizations around the world real control over their information. This way, we simplify everyday tasks and provide the freedom to pursue true innovation.



- **Our ecosystem:** By choosing OnBase, you benefit from being part of an ecosystem of organizations and professionals who are all committed to improving the way you work. Hyland offers multiple ways to access training courses – from hands-on technical conferences to online training.

## Flexible deployment options

Deploy OnBase in the cloud or as an on-premises solution. No matter how you deploy your solution, you gain all of the functionality you require. You also have the flexibility to migrate your OnBase system from on-premises to our worldwide network of cloud datacenters and vice versa. We are there for you when your requirements change.

## Partner channel

Hyland has an extensive partner channel of more than 300 certified OnBase partners and 3,000 certified experts providing our worldwide community with local expertise and support.

Our partners are product experts and help our users solve real business problems. They provide additional value beyond OnBase know-how, such as software, hardware and consultative services from one credible, expert resource.

## About Hyland, creator of OnBase

For over 20 years, Hyland, creator of OnBase, has helped our more than 13,000 lifetime customers by providing real-world solutions to everyday business challenges. That dedication is how Hyland realizes double-digit growth and why 97 percent of our customer base continues to renew its annual maintenance. Our customers see the ongoing value of partnering with Hyland and continue to work with us year after year.

“The OnBase Cloud is easy to deploy and administer, and it’s easy for end users to understand.”

Document management & automation services manager  
Leading Health Insurer



Learn more at [OnBase.com](http://OnBase.com) >>

**ALL STAR**  
SOFTWARE SYSTEMS

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by Hyland

**Diamond**  
Support Partner  
2015

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