

# NAVIANT SUMMIT

*momentum. accelerate your experience.*



## MONDAY, OCTOBER 21<sup>ST</sup>

7:00 - 9:00	Summit Registration & Breakfast		
7:30 - 8:30	Insurance Session	Government Session	
8:30 - 8:45	Break		
8:45 - 9:45	General Assembly   Customer Presentations		
9:45 - 10:00	Break		
10:00 - 10:50	What's New in Hyland Product Innovations	A Foundational Background in OnBase	
10:50 - 11:05	Break		
11:05 - 12:05	<b>KEYNOTES</b> <b>Building Momentum for Perfect Execution</b> presented by Bill Sullivan, Vice Admiral US Navy  <b>Hyland's Modernization Strategy: A Foundation for the Future</b> presented by Glenn Gibson, Hyland Software		
12:05 - 1:05	Lunch		INVITE ONLY <b>EXECUTIVE SESSION</b>  Cloud as a Strategic Imperative  Leadership by Walking Around
1:05 - 1:55	Point Solutions at the Speed of Business	Accelerate Your Business Process with Workflow	
1:55 - 2:10	Break		
2:10 - 3:00	Creating a Big Bang with Brainware	Propel Your Organization with OnBase Search	
3:00 - 3:15	Break		
3:15 - 4:05	Will Intelligent Humans Be Replaced By Intelligent Machines	Break Up Your Dynamic Process with WorkView	
4:05 - 4:45	Expert Stations		
4:45 - 5:00	Closing & Prize Drawings		
5:00 - 9:00	<b>Dinner &amp; Euchre Tournament at The Fields</b> <i>located adjacent to the Wilderness at 511 East Adams Street</i> Cocktails & Appetizers at 5:00 PM   Dinner at 6:00 PM   Euchre at 7:00 PM		

## TUESDAY, OCTOBER 22<sup>ND</sup>

7:30 - 8:30	Half-Day OnBase Training Registration & Breakfast		
8:30 - 11:30	Reporting Dashboards	System Admin Tips & Tricks	Recertification: System Admin
11:30 - 12:30	Half-Day OnBase Training Registration & Lunch		
12:30 - 3:30	WorkView	Workflow	Recertification: Workflow

# MONDAY, OCTOBER 21<sup>ST</sup>

7:45 - 8:30 AM

## Insurance Session

*Jeff Hiegert, Hyland | Tundra Rooms (BC)*

Hyland's Senior Customer Advisor for Insurance will provide insight on how to leverage the power of OnBase throughout your insurance organization. Explore solutions for New Business and Underwriting, Policy Maintenance and Customer Service, or Claims and Compliance. You'll also learn some tips and tricks on how to identify and prioritize your next OnBase opportunity.

## Government Session

*Chuck Duchon, Hyland | Tundra Rooms (DEF)*

Led by Hyland Software's Government Solutions Architect, this discussion will focus on leveraging document management, and the powerful impact OnBase can have throughout your government agency. You'll also get the scoop on the latest and greatest, including what's next for OnBase in the public sector.

10:00 - 10:50 AM

## What's New in Hyland Product Innovations

*Colleen Alber, Hyland | Sandstone Ballroom*

We will spotlight the most exciting Hyland innovations in capture, search, case management, cloud, mobile, maps, and reporting. You'll also learn how you can combine the latest enhancements in OnBase 18 and OnBase Foundation with other Hyland portfolio products—ShareBase, Brainware and Enterprise Search—to build better solutions and plan for future technologies. This session is sure to be packed with "WOW" moments that will be helpful to you and your organization.

## A Foundational Background in OnBase

*Mark Miller, Naviant | Tundra Rooms*

This session provides the foundational background you need to build your understanding of OnBase and its capabilities as you accelerate your organization's business processes. Your "Master Mechanic," Mark Miller, will guide you through the components of building your OnBase solution as if it were a race car. Attendees will learn about the six key pieces of OnBase, which, when properly tuned, will help you build momentum within your organization and bring your business process to victory lane.

KEYNOTES: 11:05 AM - 12:05 PM



## Building Momentum for Perfect Execution

*Vice Admiral Sullivan, United States Navy | Sandstone Ballroom*

Vice Admiral Sullivan of the United States Navy will share his personal story of how he leveraged the power of momentum to execute a historic military attack. In August of 1998, two U.S. embassies in Africa were bombed by Al Qaeda terrorists, killing over 200 people, including American citizens. U.S. intelligence traced the attack to Osama bin Laden, who orchestrated the attacks from his hideout in Khowst, Afghanistan. The USS COWPENS (CG-63) was tasked on short notice to lead a five-ship Tomahawk missile strike on the terrorist camp to eliminate Al Qaeda leadership.

## Hyland's Modernization Strategy: A Foundation for the Future

*Glenn Gibson, Hyland Software | Sandstone Ballroom*

See the latest update on the modernization and unification of Hyland's product portfolio. You will learn how Hyland is actively laying a foundation for the future of your solution. Additionally, you will learn some practical steps that you can take to ensure you are benefiting from the very latest capabilities.



12:05 - 1:05 PM

## Lunch Roundtables

Naviant provides hosted roundtables on a variety of topics during lunch to promote networking amongst attendees and resident experts on topics of interest.

- Government Solutions
- Insurance Solutions
- Manufacturing Solutions
- Accounts Payable
- Human Resources
- ShareBase
- WorkView / Case Management
- Integrations
- Workflow
- Intelligent Capture
- OnBase System Admin
- OnBase 101 / New to ECM

1:05 - 1:55 PM

## Point Solutions at the Speed of Business

*Matt Hein & Chris Krause, Naviant | Sandstone Ballroom*

You are no longer required to have long development cycles! Point Solutions provide a rapidly deployable alternative to meet the ever increasing speed of business. Buckle yourself in to drive Contract Lifecycle Management, race with high-speed Public Records Request Management, adjust the track bar within Agenda Management and take a pitstop at OnBase Checklists for Process Controls.

## Accelerate Your Business Process with Workflow

*Meryl Weber & Clay Blohm | Tundra Rooms*

How much time do you spend managing your work vs. actually doing your work? This session will provide examples of real scenarios and ideas to help you apply workflow concepts to your business. We will explore multiple business areas (HR, AP, AR, Contracting, Healthcare, and more) and share ideas and tools that you can leverage to improve your processes. Bring your questions and ideas!

2:10 - 3:00 PM

## Creating a Big Bang with Brainware

*Ed Modjeska, Naviant & Evan Bryant, Hyland | Sandstone Ballroom*

Artificial Intelligence capabilities provide transformative possibilities to the way we work. However, more than 80% of intelligence remains trapped inside unstructured, manually-processed documents, making business impossible to manage. Bazinga! (*translation: just kidding!*) Brainware's big brain OCR capabilities now extend beyond simple data extraction and can check for mistakes independent of human interaction. Explore the science behind the software and create a Big Bang in your organization.

## Propel Your Organization with OnBase Search

*Ann-Marie Cain, Guy Schroeder, & Dan Sabre, Naviant | Tundra Rooms*

Every organization has content, but many struggle to find it quickly. The use of shared drives, portals, and even traditional file cabinets makes it tedious to find critical content. OnBase allows users to find the information they need more efficiently. Whether you live in Microsoft Outlook, your line of business system, or Pawnee, Indiana, OnBase can help. Gain insights on ways you can search for content, and how users can maintain their daily momentum to access information quickly, regardless of their role.

3:15 - 4:05 PM

## Will Intelligent Humans Be Replaced by Intelligent Machines?

*Colleen Alber, Hyland | Sandstone Ballroom*

Technologies such as automated intelligence, machine learning, and robotic process automation are having a profound impact on the Intelligent Information Management (IIM) space. As content management professionals, we pride ourselves on the ability to deliver incredible cost savings by automating manual business processes and eliminating mundane tasks. "Will we be replaced by the same technology we once advocated?" Find some inner peace as we identify the essential "human" skills that will never be replaced.

## Break Up Your Dynamic Process with WorkView

*Ema Roloff & Brian Espinosa, Naviant | Tundra Rooms*

Sink your billiards shot using WorkView for dynamic process management. In this interactive session, we will cover how WorkView keeps your momentum going by providing you with a 360-degree view of all your information and allowing you to accelerate your business processes. You will learn the rules of the game and technical tips and tricks that will have you hustling the table in no time! Let WorkView line up the shot for you to pocket the eight ball and win the game!

4:05 - 4:45 PM

## Expert Stations

Have a one-on-one discussion with an expert and see demos on popular topics, including:

- Enterprise Search
- ShareBase
- User Interface (Mobile & Outlook)
- WorkView / Point Solutions
- Brainware
- Agenda Management, FOIA, & Esri
- HR Automation
- The Hyland Cloud
- Reporting Dashboards
- Robotic Process Automation
- OPEX Mailroom & Scanning Solutions

# TUESDAY, OCTOBER 22<sup>ND</sup>

8:30 - 11:30 AM

## Reporting Dashboards

The power of analytics shines through with OnBase Reporting Dashboards. With point-and-click configuration, easily visualize your business data within your OnBase solution. We will walk users through the process of drilling down into specific data, how to easily share dashboards with other users, export the data to Excel, and more. Dashboards can provide users with the significant insights into data; provide IT employees critical system monitoring data; provide management control of process and workflows; and, provide end users a way to monitor their individual workload. Experience the power of analytics through OnBase Reporting Dashboards.

## System Administration Tips & Tricks

Ever wonder how they do that and make it look so easy? OnBase is filled with many great features and functions; it is impossible to cover them all in a single training or even weeks of training. This class will unveil many of the best tips and tricks that have saved OnBase users, admins and companies time and money. You will be able to apply many of these tips and tricks with hands-on exercises so you can apply this knowledge long after the class has ended. Explore many of the underutilized features and functions that were added by Hyland to improve businesses like yours. Be prepared to learn, share and grow during this fun, exciting and informative session that will propel your OnBase solution to the next level.

## Recertification: System Administration (OCSA)

Explore how changes, new features and best practices directly impact OnBase System Administration with a group of experienced OnBase System Administrators. We will discuss performance, administration, user acceptance, training, troubleshooting and more in an interactive, hands-on environment. Upon successful completion of this course, any individual who is (or was) an OnBase Certified System Administrator (OCSA) will have their certification status extended for two years. Please note that this session is not a substitute for the OnBase System Administration training course. You may attend even if you have not completed the OnBase System Administration training course in the past, but only those individuals who have been an OCSA are eligible for the recertification component.

12:30 - 3:30 PM

## WorkView

Workflow is great for document-centric, repeatable processes that may have exceptions to the standard process. But what if your processes are more data-driven, dynamic in nature, and require a knowledge worker to make decisions dependent on the case? This is where Case Management (WorkView) fits in. Often complementing Workflow, Case Management can be easily configured to manage a variety of related data revolving around a case. In this training, you will learn core concepts needed to define a Case Management application and design an application from scratch to experience the power of Case Management.

## Workflow

Do you have business processes you want to standardize or automate? Do you have forms that you manually route around the office for approvals or to share common interested information? This OnBase Workflow class will be your winning ticket to impressing your boss while learning through real world examples on how to standardize and automate redundant business process tasks. You will build your own workflow while using the updated OnBase Studio interface including the latest and greatest OnBase workflow features. The OnBase workflow knowledge you will gain from this class will pay off for years to come. Come share in the wealth of knowledge that OnBase workflow provides.

## Recertification: Workflow Administration (OCWA)

Workflow has yet again been extended, allowing Workflow designers to reduce logic complexity and expand their options in meeting business needs. This class will explore the new concepts of child work items, how they relate back to the parent, and how the concept can reduce the amount of rules, actions and custom code needed. We will explore the newest notification features, the improvements in item generator, and how to simplify working with multi-instance keyword type groups. We'll also explore the most significant changes in previous versions to ensure that you're well informed on the latest Workflow capabilities that you can start using immediately. Upon successful completion of this course, any individual who is (or was) an OnBase Certified Workflow Administrator (OCWA) will have their certification status extended for two years. Please note that this session is not a substitute for the OnBase Workflow Administration training courses. You may attend even if you have not completed the OnBase Workflow training course in the past, but only those individuals who have been an OCWA are eligible for the recertification component.