

# EXTENDING ONBASE INTO HUMAN RESOURCES





### ONBASE / PUTS YOUR WORLD OF INFORMATION IN YOUR HANDS

### Leveraging OnBase in Human Resources

OnBase digitizes all employee files and provides HR staff with instant access to needed information. This minimizes costs while increasing the efficiency of HR professionals and improving their level of service to employees.

Arranged into six categories, this workbook is carefully designed to encompass the ideal elements of an OnBase HR solution.



Capture all critical content – paper, electronic and data – from any location. Minimal data entry is required because your documents are automatically classified and indexed.



Content in OnBase integrates seamlessly with core applications – like ERPs and HRIS – without requiring custom code. Not only is content instantly available directly from these applications, the systems also synchronize data in real time behind the scenes.



Better manage your data, documents and processes. OnBase allows information to flow easily throughout your organization, minimizing process delays, automating repetitive tasks and equipping users to make better decisions to drive work forward.



Monitor and report on the information and activities within your OnBase system. Identify and eliminate bottlenecks and prepare for audits with immediate insight into what information you have and what information you need — without involving IT administrators.



Everyone who needs to access content and processes can easily do so from anywhere. The user experience is personalized, integrated with core applications, available from mobile devices and extended to authorized users outside of your organization.



Securely store and protect content from disaster throughout its entire lifecycle with built-in data redundancy and automatically destroy content when it expires in accordance with legal retention requirements.

### ONBASE / CAPTURE

No matter where your documents – like employee records or benefits information – are located or what format they come in, OnBase captures them right at the source and organizes them – and the data they contain – into a single system with minimal human interaction.



A CONTRACTOR OF THE CONTRACTOR					
List any paper HR documents you reference that aren't stored in OnBase:					
_	nese documents right at the point of or ninate the cost of printing, storing and/or sh				
Flortropic					
		•			
Check the electronic that aren't currently in Or	documents and data types you reference	Where is this content	located?		
□ PDFs	☐ Text reports	☐ HRIS	☐ File shares		
□ Emails	☐ Office documents	☐ HCM system	☐ Cloud storage		
☐ Forms		, □ SharePoint®	☐ Legacy systems		
□ Faxes		□ ERP	☐ Email inboxes		
□ Data streams		☐ Personal drives			
for information.	ant electronic documents and data, yo				
	ms where manual data entry occurs in				
Where does this data		<b>▲</b>	eople manually type data into?		
		Manually typed into HRIS			
		<b>⇒</b>			
		⇒			
automatically classifi	data from electronic forms or importe ied for automated data extraction and d use it to automate the indexing of t	d validation. You can the	n send the extracted data to other		
How will your HR pro	ocesses benefit from electronic data capture	2?			

## ONBASE / MANAGE



Effectively manage data, documents and processes on one platform: OnBase. Automate repetitive process steps, get more out of your critical content and support knowledge-driven work with a complete view of information.

Manage Processes	5					
Structured processes and improved with O meaningful exception	nBase. Leveraging	Workflow and ot	her tools, OnBase			
List your structured to improve each process	d processes that could s.	benefit from OnBa		t of each, check the I	key capabilities tha	it you could use
To do so do so d'o	Verify existence and accuracy of related documents	Route decisions, documents and exceptions	Automate repetitive tasks and rules-based decisions	Send automatic notifications and reminders	Load-balance work across teams	Manage complex approval processes
Employee onboarding processing			$\square$			
✓ Once a business ded (e.g., letters, statements, etc ☐ Manually ☐ Automat	c.)					
Manage Data						
Even in your automa discretion and make documents, events, d	decisions to manag					
What challenges do Check all that apply.	o your knowledge wor	kers most often fac	ce?			
☐ Excessive use of spre	adsheets		☐ Inability to	accurately report or	n process status	
☐ Lack of collaboration			☐ Multiple a	nd/or conflicted data	sources between	departments
☐ Struggle to delegate				tracking related docu		
☐ Disconnected docum	ents, data and folders		☐ Large amo	ounts of dates and ex	epirations to mana	ge
			-		•	_

OnBase can address these challenges and reduce application sprawl. See next page.

What t

What tools are you using in HR to manage key business data and supporting processes?

Circle all that apply.













RIS

Access® databases

Excel® spreadsheets

Legacy point solutions

ERP

With tools like WorkView | Case Manager, OnBase provides a platform for data-centric and case management applications, replacing antiquated departmental databases, shared spreadsheets and legacy systems.

If you selected ERP, reference the Integrate section on page 8 to learn more about how OnBase interacts with your ERP.



QUIZ: Which of these are benefits of building applications with OnBase?

Circle all that apply. Answer found at the bottom of the page.

- a. Provide workers with a 360-degree view of all the information they need to support a specific customer, case or project
- b. Natively manage and connect data, documents, notes and correspondence
- c. Schedule events, delegate tasks, log activities and collaborate with other individuals
- d. Increase visibility with built-in reporting dashboards and full audit trails
- e. Seamlessly integrate with existing information systems
- f. Add to application sprawl by requiring many custom-developed and off-the-shelf solutions



Note any other applications that you would like to create or replace with OnBase.

### Manage Documents.....

With OnBase, your HR staff work electronically with all the critical content they need, regardless of format. Empower them to easily search for documents required to make decisions while leveraging digital folders and file cabinets to keep content organized.

\_\_\_\_ To get the most out of your content in OnBase, which of these content management capabilities would you like to incorporate into your OnBase HR solution?

Circle all that apply.



Organize with folders and file cabinets



Collaborate and



Manage revisions



Auto-generate and distribute correspondence



Sign electronically

The true beauty of the platform is that it empowers you to create applications that combine **data**, **documents** and **processes** on-premises or in the cloud. This supports areas like enterprise content management (ECM), document management, case management, smart process applications and business process management (BPM) – all while addressing your specific needs and information requirements.

### ONBASE / ACCESS



OnBase makes your critical HR content available to the people who need it, wherever they are, from almost any device or application. This enables your users to work the way they are most comfortable – whether inside or outside the four walls of your organization.

ersonalize your page		List the items your HR staff wants immediate access to:
	•	eForms (e.g., new hire forms, time off forms)
eForm:	Reading Groups:	Workflow queues (e.g., approval queue)
Workflow Queue:		Custom queries (e.g., open employee performance reviews since staff members were hired)
Custom Query:	Other:	Reading groups (e.g., policies and procedures)
		Other
Working in another appli		
	irtually any business applicatio ly from the familiar screens of	on, meaning that your users can access content and interact with critical HR applications.
	•	
usiness processes direct		ation not found in your existing HR application?

The Integrate section on page 8 will help you understand the options available to integrate OnBase with these applications.

Outside the Office						
How would your HR staff prefer to acc	ess information	?				
Circle all that apply.						
Goden Goden	 #1	OnBase	Gobse	ОпВаѕе		
Smartphone Desktop		Windows® Tablet	iPad®	Laptop		
Miles in communication and describe	t the t for	t- O-B	a daniara			
Who in your organization could benefit Who	t the most from	Device	e devicer			
Employees		6				
		<del></del>				
		7				
		<b>→</b>				
What processes could your users drive	e forward faster	if they could continue them	offline?			
Who		Process				
Recruiting manager		→ Reviewing job ap	→ Reviewing job applicant resumes			
		<b>→</b>				
		<b>→</b>				
Extended Access						
Having access to all the content you rewhen people outside your organization stakeholders — including job applicants. Reduce the burden on customer served.  Below are a few options that OnBase of (e.g., job applicants, employees, auditors, etc.).	on need access nts, employees ice by providir offers for extend	to your content as well? s, auditors and anyone el ng these individuals with ing access beyond the walls	Bridge the gap betwee lse who needs to inter a self-service options.	n you and your external act with your content.		
External web access	<u>\@</u> /	Direct links to OnBase	Signatures			
(through your online portal)		documents in an email	· ·	ates with DocuSign®		
Who Job applicants	Who Employees		and CIC Cerem enables you to —— signatures from	ony™ Server. This electronically obtain n people outside your		
				n the cloud. Which ire external users to cs?		
What Copies of resumes and cover letters	What Policies and	l procedures				

### ONBASE / INTEGRATE



The information and processes managed by OnBase almost always relate directly to data, tasks and activities within other systems. Integrating OnBase with the applications your HR staff use every day provides significant improvements in productivity.

Below are some common processing inefficiencies that result from a lack of integration between OnBase and other systems:



**Switching applications:** HR staff frequently leave their HRIS and other related systems they work in and switch over to OnBase to perform related tasks, then switch back to their core application. These related tasks in OnBase could include searching for related information, performing steps in a workflow, filling in forms and/or saving documents outside of OnBase to email or edit.



**Multi-step uploads:** Users perform multiple steps when simply trying to upload documents into OnBase (e.g., Office documents, emails, attachments, etc). They save documents to a folder, launch OnBase, drag and drop a folder into OnBase and then index the document.



**Duplicate data entry:** Users enter the same data into multiple systems (e.g. OnBase and your ERP) or transpose data from one system to another.



**Data out of sync:** Data gets out of sync between OnBase and your other applications, causing delays in your processes. Users must wait for information to be updated or manually verify and update information prior to taking action.

By integrating OnBase with your other applications, you address these issues. There are multiple integration approaches and OnBase provides many options. We offer purpose-built integrations with several key applications, integration tools to integrate OnBase with ANY application and our API, which allows you to create your own integrations with OnBase. Use this chart to compare the advantages of each:

	Install: Speed to implement based on amount of effort required	<b>Upgrade:</b> Integration method fully tested for each OnBase version	Maintain: Support provided to troubleshoot issues with performance or functionality
Purpose-built integrations	Fastest	Fully Tested	Full Support
Integration Tools	Fast	Fully Tested	Full Support
Custom code integrations with the API	Slowest	Partially Tested*	Partial Support*

<sup>\*</sup>Hyland, creator of OnBase, ensures the API toolkit functions as expected during each upgrade and your first line of support will confirm that the API toolkit is functioning as expected. Please review the terms of your support contract for details.

### START HERE

Is there a purpose-built integration for the application(s) you wish to integrate with? (Check the Productivity Tools & Enterprise Applications lists on the left-hand side of the page.)

	······ Yes ·······	No		
Productivity Tools	Enterprise Applications	My application was not listed on		
☐ MS Outlook®	☐ Oracle PeopleSoft Enterprise™	No problem! Let's pick the right in	ntegration tool :	for you.
☐ MS Office Business	□ Infor Lawson™	Da		-1-4-1-1
Applications	☐ SAP™	Do you want to integrate withou	it writing or m :	laintaining custom code?
☐ MS SharePoint®	☐ Oracle E-Business Suite™	Yes		····· No ····
☐ Google Services	☐ Deltek Costpoint®			
☐ IBM Notes®	☐ Check OnBase.com/Community	Pick the issues you want to solv	e:	
☐ Novell GroupWise®	for more		<b>FA</b>	
	:	(×)	DA	
<b>↓</b>	•	Data out	Duplicate	Switching
There is a purpose-built	There is a purpose-built	of sync	data entry	applications
integration for you. These	integration for you. These			
integrations are built directly	integrations are built directly	:		
into the application and will solve these issues:	into the application and will solve these issues:	<u>i</u> .		i.
Solve these issues:	solve triese issues:	You need a data-level integration	n You need	a screen-level
•		The Enterprise Integration Serve	intogratio	
		THE THEIPHISE HITERIATION SELVE	=	

Switching



Multi-step applications uploads

**Switching** applications



Duplicate data entry



Data out of sync

(EIS) ensures an instantaneous, guaranteed exchange of data between OnBase and your core systems without requiring programming to an API or relying on error-prone, flat-file data exchanges.

If you simply need other applications to access information from OnBase, look into Published Web Services. Auto-fill keyword sets, a standard OnBase feature, may also be worth exploring. This allows OnBase to directly access and utilize sets of data that exist in other applications when users are indexing documents, completing forms, etc.

Application Enabler allows you to integrate OnBase with your existing applications with no custom coding. Link OnBase documents, folders, forms, queries and more to fields on the screens of your applications with a few clicks.

### You need to create your own

The OnBase suite of APIs gives you the flexibility to create your own integrations with OnBase. We provide your programmers with access points to integrate with OnBase documents, processes and more. Programming interfaces for industry standard languages allow your developers to create custom integrations with familiar tools like .NET, COM, Java and Web Services.

Which integration method is right for you?

Note your ideas and/or questions to ask your solution provider.

### ONBASE / MEASURE



What you can measure, you can improve. OnBase provides tools that provide visibility into almost everything that is happening within the system.



Match the OnBase capability to the benefit.

Match the number that corresponds with each letter. Answers found at the bottom of the page.



Α.





В.

Audit



C.

Report

- **1.** Ensure compliance with internal and external standards and avoid costly fines by identifying missing, incomplete or out-of-date information. Provide auditors with access via a secure website, allowing them to perform their work without coming on-site.
- 2. Run historical reports from OnBase without relying on IT. Over 140 pre-configured reports provide information to use for budgeting and resource planning, including system usage and performance, licensing, processing times, bottlenecks and more.
- 3. Gain real-time visibility into Workflow and immediate, actionable information about the status of critical processes including color-coded threshold benchmarking. Available on a tablet, SharePoint site and OnBase Web Client.

### Monitor

Who would benefit from real-time visibility into processes?	Which processes?	How would they access this? Tablet SharePoint Site OnBase Web Client	
Audit			
If an auditor walked in the door and required access to information, how would you feel? Circle one.	Why?	What information in HR do you need to regularly verify the existence, accessibility and accuracy of?	
Penort			





List the processes you would like to enable your users to report on and analyze.

(e.g., employee policy and procedure compliance)



**List the areas of OnBase you'd like insights into.** (e.g., employee workload, volume of documents processed)



In order to prove the value of this solution to free up funds for future projects, what benchmarks would help you prove and track the ROI of the solution?



OnBase Product Workbook | 10 Answers: A-3, B-1, C-2

### ONBASE / STORE

Storing your important information in one centralized place grants you complete control over it. With OnBase, your unique records management and retention requirements are now well within your grasp without adding significant or unnecessary expenses to the total cost of your solution. Ultimately, consolidating your content into one system eliminates the need to manage it across a variety of databases, systems and physical storage locations.



Destroy  Legal requirements dictate that your documents are deleted according to specific retention schedules.  Do you want your HR solution to allow you to manage your content throughout its entire lifecycle?  Yes No  What types of retention requirements exist in your organization?	OnBase is already a secure solution, designed to protect your data without the use of third-party software. However, if your industry standards require an additional layer of security, OnBase may be tailored to accommodate your specific needs.  Safeguarding your data is also pertinent to remain in compliance with company, state and industry standards.  Which compliance regulations impact how you store data?
What is your current method of managing these requirements?	Can you ensure that sensitive data stored within your database such as SSNs and medical information, is protected from database administrators and other unauthorized external parties?
Protect  Online redundancy is an inherent characteristic of OnBase, ensuring that your content isn't vulnerable to catastrophic events.	Yes No  Encryption at the disc-group level can protect against unauthorized access to your important files. What HR documents could benefit from this level of protection?
In the event of a catastrophe – such as a fire, power outage or natural disaster – what strategy do you currently use to ensure	
information is protected?	Do you require https encryption to protect your data as it's transmitted across the internet?  Yes No
For data in your database, have you implemented database backups, log shipping, mirroring or clustering? If not, why?	

### Bringing it all back

Now that you have evaluated how OnBase can improve your HR processes with this workbook, it has likely sparked some ideas and helped you identify several areas for improvement.

_	Note your top priorities for expanding OnBase into HR here.

### What do you do now?

To get more information on the specific functionality available to you in each product category, go to the Product section on Community and filter by the categories in which you see potential.

When you're ready to get started, contact your solution provider to guide you through the process.

Solution Provider Contact:
Name:
Email:
Telephone:

Learn more at OnBase.com/HR »















