



TUESDAY, MAY 14 - Eastern Time Zone

10:30 - 10:50	OPTION 1 Trivia
	OPTION 2 OnBase 101
11:00 - 11:20	General Session
11:30 - 11:50	OPTION 1 What's New in OnBase Foundation 24.1
	OPTION 2 Change Management: How to Prepare Your Organization for Digital Transformation
12:00 - 12:20	OPTION 1 Enhance Accounting Process Efficiency with AP Automation
	OPTION 2 Content Portal (powered by Jadu Central)
12:30 - 12:50	OPTION 1 Cloud Migration
	OPTION 2 OnBase App Builder Customize Your OnBase Experience
1:00 - 1:20	OPTION 1 Workflow & Hyland RPA
	OPTION 2 Managed Services, Naviant InsightIQ & Optimization Assessment
1:30 - 2:00	General Session
2:00 - 2:30	Unraveling the Opportunities of Artificial Intelligence (AI): Group Discussion

WEDNESDAY, MAY 15 - Eastern Time Zone

10:30 - 10:50	OPTION 1 Trivia
	OPTION 2 Government Industry Session
	OPTION 3 How AI Capture is Solving Labor Shortages in Healthcare Information Management (HIM)
	OPTION 4 Insurance Industry Session Managed Services & Outsourced Mailroom Automation
	OPTION 5 Higher Education Session
11:00 - 11:30	Keynote Speaker: The Benefits of Community Connections: Why We Need Each Other
11:30 - 11:50	OPTION 1 Creating an HR Content Hub with OnBase
	OPTION 2 Unleash the Future: Dive into the Hyland Experience!
12:00 - 12:20	OPTION 1 Artificial Intelligence for Intelligent Document Processing
	OPTION 2 Key OnBase Integrations
12:30 - 12:50	OPTION 1 Content Migration & Conversions Tips & Tricks
	OPTION 2 Unlock Insights & Save Money with Salesforce and OnBase Integration
1:00 - 1:20	OPTION 1 WorkView Improve Your Processes Fast with Low-Code Application Development
	OPTION 2 Electronic Signature Automation
1:30 - 2:00	General Session

10:30 - 10:50 ET

Trivia

Brian Carl & Mel Gatwood | Naviant

Start your day with trivia! We will only be covering fun topics, like TV shows, popular movies, sports, and toys and games. There will be three rounds, lasting five minutes each, and a prize will be given to the winner of each round.

OnBase 101

Emma Simone & Jeremy Hettinger | Naviant

OnBase is a single enterprise information platform for managing content and processes in a secure, centralized location. It provides the correct information to the right people whenever and wherever they need it. OnBase empowers organizations to become more efficient, agile, and effective. How does OnBase do it? Join us as we explore the six components that make up OnBase and how this solution can improve your work life.

11:00 - 11:20 ET

General Session

Ed Modjeska | Naviant

This general session will kick off the Summit and share Naviant's obsession with helping our clients succeed in their intelligent automation journey and realize a better work life. We'll share new ideas and review how to make the most of your time at the 2024 Naviant Summit.

11:30 - 11:50 ET

What's New in OnBase Foundation

Colleen Alber | Hyland

We will spotlight the most exciting Hyland product innovations for both OnBase administrators and end users alike. Included are significant updates to the new OnBase Application Builder (think WorkView!), Integration for Adobe Sign, AP Automation, OnBase Admin Portal, and more. Combine the latest platform enhancements—including hundreds of accessibility updates—in OnBase Foundation 24.1 with your existing technologies to build better solutions!

Change Management: How to Prepare Your Organization for Digital Transformation

Cherise Kam & Sarah Holtz | Naviant

Digital Transformation is no easy feat. Luckily, Naviant will be your partner every step of the way. This session will cover how to prepare your team, solicit buy-in from your end users, and ensure successful adoption of the new processes or technologies implemented. We will also cover what to expect from the Project Management team, Project Kickoff, and where in the process your end users and Subject Matter Experts are most needed. From documenting current state practices to the Joint Application Design (JAD) sessions to testing, this session will focus on how you can ensure long-term success during your digital transformation journey.

12:00 - 12:20 ET

Enhance Accounting Process Efficiency with AP Automation

Michael Coyne & Trevor Graham | Naviant

Discover a solution that will let you break free from tedious, error-prone, manual accounts payable processing. Join us to explore how AP Automation can transform your business by boosting efficiency, minimizing errors, and freeing up time and resources so you can tackle more impactful tasks.

Content Portal (Powered by Jadu Central)

Chris Krause | Naviant & Colleen Alber | Hyland

In this exclusive session, we invite you to delve deep into the expanding horizons of the Hyland Content Portal powered by Jadu. Join us as we unfold the comprehensive features and advanced capabilities that empower you to reshape your digital landscape effortlessly by sharing your critical content externally, including your WorkView content! From the point-and-click familiar, easy configuration and intelligent management to dynamic delivery across channels, this session is your gateway to unleashing the full potential of our innovative portal solution. Explore the future of user-centric experiences and discover practical tips for enhancing collaboration with your vendors, constituents, and more. Witness firsthand the tools that will elevate your digital strategy to new heights.

12:30 - 12:50 ET

Cloud Migration

Blake Spicker & Shannon Olsen | Naviant

Thinking about making the jump to the Hyland Cloud? The time is now! Embarking on the transformative journey to the Cloud signifies a leap toward enhanced organizational efficiency and flexibility. In this presentation, we will review the myriad of benefits you can get by being in the cloud. We will also review the Naviant methodology for ensuring successful cloud migrations. Discover how migrating your solution to the cloud will benefit your organization and how Naviant's approach will ensure you receive the full benefits of the cloud as your organization continues its digital transformation journey.

OnBase App Builder | Customize Your OnBase Experience

Colleen Alber | Hyland

The OnBase App Builder allows admins to reimagine the OnBase user experience. End users can now access OnBase through tailored web interfaces designed to optimize the work they do, rather than organized by the software module they are using. Tiled "quick access" interfaces provide direct access to frequently used OnBase features like document upload, search, and processing.

1:00 - 1:20 ET

Workflow & Hyland RPA

Jeff Comer | Naviant & Ken Payne | Hyland

Happy with your OnBase workflows, but still have some manual steps performed in external systems? Add Hyland Robotic Process Automation into the mix to automate that last mile. Hyland RPA works fluidly with OnBase workflow to exchange information and complete tasks normally performed by knowledge workers due to a lack of available integrations. Increase the speed, accuracy, automation, and efficiency of your processes with Hyland RPA bots.

Managed Services, Naviant InsightIQ & Optimization Assessment

Jeff Luker & Brian Espinosa | Naviant

Naviant's ever-growing Managed Services team has been successfully helping organizations operate, enhance, and expand their ECM solutions since early 2022, with a flexible offering designed to meet the evolving needs of the organizations we work with. But how can we help organizations take the next leap from good to great? Come discuss our latest offerings as we highlight recent initiatives to help organizations create an optimization roadmap and leverage new tools to monitor and resolve issues before users experience them.

1:30 - 2:00 ET

General Session

Ed Modjeska | Naviant

Hear from Naviant customers as they reflect on their digital evolutions. These customers will share their organization's Intelligent Automation or Digital Transformation journey.

2:00 - 2:30 ET

Unraveling the Opportunities of Artificial Intelligence (AI): Group Discussion

Chris Krause & Mark Miller | Naviant

This engaging discussion aims to demystify AI, explore its diverse applications, and delve into the ethical considerations surrounding its rapid evolution. Join us for this thought-provoking group discussion, where collectively we will converge to share insights, experiences, and visions for the future of Artificial Intelligence. Whether you're a seasoned professional or simply curious about AI, this session offers a unique opportunity to explore the multifaceted dimensions of this transformative technology.

WEDNESDAY, MAY 15

10:30 - 10:50 ET

Trivia

Brian Carl & Mel Gatwood | Naviant

Start your day with trivia! We will only be covering fun topics, like TV shows, popular movies, sports, and toys and games. There will be three rounds, lasting five minutes each, and a prize will be given to the winner of each round.

Government Industry Session

Vince Hanson | Naviant

Join us for a discussion on the positive impact that content, process, and case management can have on your government agency. Learn how OnBase low-code apps can be used to manage cases, requests, and issues, all while providing complete access to supporting documents, tasks, notes, emails, correspondence, & more. We will also share real customer implementation examples to help guide the vision of how OnBase is being used in the public sector.

How AI Capture is Solving Labor Shortages in Healthcare Information Management (HIM)

Michael Coyne | Naviant & Matt Williams | ABBYY

Join our experts as they guide you through an exploration of how Artificial Intelligence (AI) is solving the critical issue of labor shortages in Healthcare Information Management (HIM). From automating the indexing process to ensuring data accuracy, ABBYY Vantage emerges as the go-to solution for healthcare organizations striving to implement efficient data management practices and ultimately enhance patient care.

10:30 - 10:50 ET

Insurance Industry Session | Managed Services & Outsourced Mailroom Automation

Michael Coyne | Naviant

*with customers **Brittany Goehring** | Society Insurance & **Andrew McCready** | Wisconsin Physician Service*

It's become difficult to support your operations with the team you have, and just keeping the lights on is a daily struggle, much less delivering continual enhancements to your operations. You're not alone, this is a sentiment many of our clients share with us, and we're here to help! During this session, we'll talk with Society Insurance about how they've leveraged their investment in OnBase to help them grow more than 40% since expanding into new geographic markets and how they use Naviant's Managed Services to keep pace with increased demand. Another area of concern we hear is the cost to support non-value-added tasks such as Mailroom Operations. For more than 75 years, Wisconsin Physicians Service has been a leading provider of health insurance and administrative services for the U.S. Government. As part of their award-winning processes, they now provide a highly secure, affordable option to outsource the mail handling, scanning, indexing, and destruction of physical mail and digital documents. WPS will share the details of this outsourced option to allow your team to focus on the customer.

Higher Education Session

Bob Owens | Naviant & Ray Dieter | Jadu

Explore capabilities that Naviant now offers for your OnBase content services platform and discover how implementing these solutions on campus can help you get the most value from your investment. Naviant has partnered with Jadu to provide an integrated portal solution that enables exceptional digital education services, empowering students and families to self-service from any location using their mobile, tablet or desktop devices. With the Jadu Content Portal for Higher Education, you empower students to submit, request, and process information online via a modern, accessible portal. They easily submit documents, complete online forms, make payments, and check the status of their requests from any web browser. In addition, many Colleges and Universities struggle to maximize the value of OnBase due to competing priorities, unexpected outages, and a lack of expertise. With Naviant Managed Services for Higher Education, we augment and supplement your OnBase support team with Naviant Higher Education industry experts. You will hear from other schools that have successfully implemented Naviant Managed Services to get the most value from their investment.

11:00 - 11:30 ET

Keynote Speaker: The Benefits of Community Connections: Why We Need Each Other

Colleen Alber | Hyland

In today's fast-paced, technology-driven world, it's easy to feel disconnected from others. This is where the importance of building 'community connections' comes in. In this session, we'll share three inspiring OnBase customer stories, strategies for staying connected, and tools you can use to stay engaged with the Hyland Community.

11:30 - 11:50 ET

Creating an HR Content Hub with OnBase

Tricia Shields | Naviant & Tess Venhoff | Hyland

Providing seamless, secure, and intuitive access to employee content empowers HR professionals. By creating an HR content hub, you have a single source of truth for HR data that can be accessed whenever and wherever it's needed. Highlighting recent OnBase enhancements and integrations with SAP SuccessFactors and Workday HCM, Tricia Shields, VP of Human Resources at Naviant, and Tess Venhoff, Hyland Technology Evangelist, will share insights on how Naviant solutions can support your HR Content HUB and allow for a next-level user experience.

Unleash the Future: Dive into the Hyland Experience!

Ed Modjeska & Chris Krause | Naviant

Insight and Automate: Hyland Experience's next generation of cloud-native platform capabilities. These initial services will enable intelligent content automation and transform the way organizations leverage artificial intelligence (AI) for content and process management. Experience Insight leverages AI to optimize the decision-making process and provide advanced content enrichment and predictive analytics capabilities. Hyland Experience Automate drives efficiency by streamlining workflows and driving complete end-to-end automation. Both services are compatible with existing Hyland platforms, allowing customers to leverage the latest innovation from Hyland Experience while maximizing the value of their current solutions.

12:00 - 12:20 ET

Artificial Intelligence for Intelligent Document Processing

Jeff Comer & Mark Miller | Naviant

You've been hearing about AI all over the news... ever wonder how it might apply to your world at work? To take advantage of Generative AI, you need to build a knowledgebase of data. Knowing that 90% of business processes include documents (the data for your knowledgebase,) AI is applied to the documents as part of Intelligent Document Processing (IDP). We'll discuss how ABBYY applies AI to IDP through Neural Networks, Large Language Models, and Machine Learning along with real-world examples of how these apply to your business processes, documents, and desired outcomes.

Key OnBase Integrations

Trevor Graham & Clay Blohm | Naviant

Join us on a journey of seamless integration excellence where we delve into the robust integration capabilities of Hyland OnBase. We will explore the power of Application Enabler, dig into the intricacies of API integrations, and discuss the seamless connections into leading platforms such as Salesforce, SAP, and Workday. Discover how these integration features can elevate your business processes, streamline workflows, and enhance overall efficiency.

12:30 - 12:50 ET

Content Migration & Conversions | Tips & Tricks

Chris Krause & Clay Blohm | Naviant

Join us for an insightful session on Content Migration and conversions, where we will demystify the complexities of effortlessly transitioning your digital content. Whether you're moving to a new platform or optimizing your existing one, this session is your guide to a smooth, efficient migration process. We'll unravel the secrets to seamlessly transitioning your content and maximizing its impact. In this session, you will discover expert tips on preserving content integrity, managing metadata, and ensuring a seamless user experience throughout the migration journey. We'll delve into best practices, share real-life stories, and explore the art and science of migrating content across platforms. You won't want to miss these tips and tricks for content migration and conversions from two guys with over 50 years of combined experience.

Unlock Insights & Save Money with Salesforce and OnBase Integration

Joseph Ponte | Naviant & Bryan Boynar | Hyland

Join us for an insightful session where we delve into the power of integrating Salesforce and OnBase to elevate your organization's efficiency. In today's fast-paced business environment, streamlined processes and unified data are critical to success, and this integration offers just that. We'll cover an introduction to the integration and its key benefits and learn about effortless data syncing, enhanced workflow automation, unified client insights, and implementation best practices to ensure you get the most out of this robust integration.

1:00 - 1:20 ET

WorkView | Improve Your Processes Fast with Low-Code Application Development

James Morrison | Hyland

Imagine the ability to rapidly adapt to changing business needs and challenges without the need for specialized knowledge. Low-Code Application Development is the answer using Hyland's Workview module. Hyland's Workview module is often referred to as case management because it allows you to manage each data item or case in a non-linear manner. All workers will have a 360° into each case so they can efficiently manage it. We will demonstrate how your users can benefit from leveraging the Workview Client to make their daily tasks easier. See how you can easily manage contracts, public records requests, help text applications, and even auto-fill datasets with low-code application development examples you will want to implement in your solution today.

Electronic Signature Automation

Jeremy Hettinger | Naviant & Bryan Boynar | Hyland

This session will cover the many different signature options that exist in OnBase, including DocuSign, Adobe Sign, and options like Unity Form approvals via mouse/tablet all the way through using Topaz Signature technology. Special attention will be given to the purpose-built signature integrations for both DocuSign eSignature and Adobe Sign. Together, OnBase and our signing partners can completely streamline document creation, approval, tracking, and post-signature processing, as well as reduce legal risk and ultimately improve the user experience.

1:30 - 2:00 ET

General Session

Ed Modjeska | Naviant

We'll wrap up the Naviant Summit with exciting announcements and updates! Join us to congratulate the 2024 Naviant Innovation Award winner. We will also reveal exclusive attendee promotions and announce door prize winners.