

USING WHAT YOU HAVE:

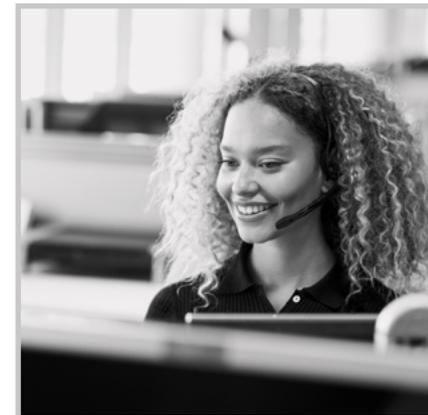
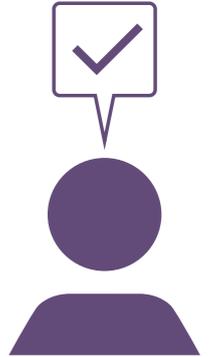
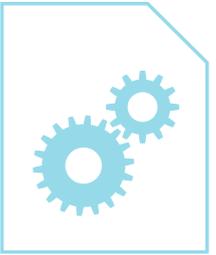
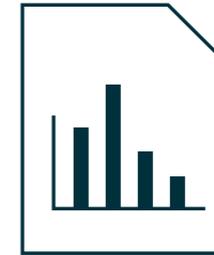
43 ways to leverage OnBase's low-code applications across your enterprise



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Introduction

“DIGITAL TRANSFORMATION”

Over the past three decades, the term has described different phases of a technology revolution. Today, most organizations recognize that digital transformation entails much more than going paperless and capturing and managing content. As a customer of Hyland, you know the key to unlocking productivity gains and improving customer experience is to embrace a modern content services strategy.

In this ebook, we explain why leveraging a content services strategy with low-code application development is the next giant leap in your digital transformation journey.

You're already using OnBase, Hyland's enterprise information platform. But you might not be aware of how your current OnBase solution can be transformed quickly and cost-effectively into endless types of business applications that can address a range of needs enterprise-wide.

ONE LOW-CODE PLATFORM — A SPECTRUM OF APPLICATIONS

Your OnBase solution is primed and ready to expand to every department of your enterprise. By rapidly building solutions on the platform you already own — rather than buying separate solutions or using inefficient workarounds — you can expect benefits including:

- Rapid, purpose-built solutions without heavy IT involvement
- Reduced reliance on legacy systems
- Consolidated technology investments
- Quicker responses to the demands of your customers and your business
- More flexibility for shifting requirements

Nearly 1,000 of your fellow Hyland users take advantage of OnBase's low-code application solutions. You can leverage it too, and in the following pages we'll share some of the common expansions that can connect your enterprise across any department.

Here's a look into a variety of ways organizations are using it today >>



Accounting and finance

Not using OnBase for your accounting and finance department? Here are 10 ways you can start:



ACCOUNTS PAYABLE – INVOICE PROCESSING

1. Improve visibility into invoice volumes and process performance to shorten payment cycles and improve cash flow management.
2. Provide employees with a complete view of all the information they need to speed up invoice exception handling, and, ultimately, the entire invoice life cycle.

ACCOUNTS RECEIVABLE MANAGEMENT

3. Connect AR staff with the right information at the right time to ensure they make better decisions and maximize productivity.
4. Minimize operational costs while leveraging reporting capabilities that increase visibility into cash flow, improving accuracy and accelerating payment application.

CAPITAL EXPENDITURE MANAGEMENT

5. Replace antiquated and outdated methods for managing cross-enterprise spending within your organization.
6. Build a low-code business application so users can quickly and easily propose and approve capital expenditure requests, speeding up the entire process.

FINANCIAL COMPLIANCE MANAGEMENT

7. Let OnBase's low-code application development capabilities help support your financial compliance efforts. Applications can be created using a variety of features like built-in dashboard reports, native audit trails, etc., to support a variety of compliance initiatives, including Payment Card Industry (PCI) audit/PCI compliance and Sarbanes-Oxley (SOX) audit/financial controls.

FINANCIAL REPORTING MANAGEMENT

8. Replace the use of inefficient spreadsheets with an application that tracks and analyzes monthly finances with historical and trending prediction reporting.



VENDOR MANAGEMENT

9. Streamline the process of creating and updating vendor records and manage all of the documents associated with vendors in a single, centralized location.
10. Allow vendors to submit their own information via electronic forms and automatically route the information for review and approval to accelerate vendor onboarding.

“

OnBase is now used by almost every department and almost every knowledge worker in the company. It has a huge range of accessibility.

”

Sean Lemon, National Project Manager, UFP Industries

CUSTOMER HIGHLIGHT

At UFP Industries (UFP), a wood and wood product manufacturer, one content services platform oversees several areas, from capital expenditures and compliance with the SOX Act to legal to storm water management. How? With OnBase, UFP leverages one, comprehensive case management platform to control several business processes across the organization.

Take away: Leveraging OnBase across several business units makes employee discretion and decision-making, organization-wide collaboration and access to supporting documents and data simpler and more efficient.

[GET THE FULL STORY »](#)

Human resources

Human resources (HR) is often the first impression of your organization, and if it's not working full throttle, nothing is. Expand OnBase to HR, and you'll see efficiencies that impact everything from finances to employee longevity.

COMPENSATION MANAGEMENT

- 11. Enable managers to review employee compensation data in a central view and export it directly into your payroll system.

DRUG AND ALCOHOL TESTING

- 12. Increase governance around the administration of testing employees for drugs and alcohol with an application that can also provide regulatory reporting.

EMPLOYEE ONBOARDING AND SEPARATION MANAGEMENT

- 13. Ensure all required actions are taken for new or departing employees for a smooth transition.
- 14. Easily monitor tasks across departments and track the entire process with automatic checklists.
- 15. Quickly identify issues or bottlenecks in advance with reporting dashboards at the employee, department or organization level.

EMPLOYEE RECORDS MANAGEMENT

- 16. Effectively and securely manage a comprehensive digital employee file from hire to retire.
- 17. Improve access and visibility by connecting digital files with the employee data in your Human Capital Management (HCM) system.



EMPLOYEE RELATIONS MANAGEMENT

- 18. Maintain consistent processes for handling employee complaints, grievances, safety violations or misconduct.
- 19. Get a holistic view of all tasks, conversations, notes and documentation surrounding an employee issue from a single location.
- 20. Minimize legal risk with increased security and control over sensitive employee information.

POLICIES AND PROCEDURES MANAGEMENT

- 21. Effectively create, distribute and track employee acknowledgement of policies and procedures while reducing associated administrative tasks such as filing, copying and mailing physical documents.



“

The amazing thing about OnBase is that there is a feature for everything; we really didn't have to code much at all.

”

Ren Bellu, Director of ERP Systems, The Judge Group

■ CUSTOMER HIGHLIGHT

For The Judge Group, a leading staffing firm with clients around the world, rapid growth was leading to strains in HR. It needed an automation solution that would not only keep up with onboarding and compliance efforts, but also give The Judge Group a competitive edge. Once it was using OnBase to manage key content like contractor HR documents, The Judge Group determined it was time to take advantage of the system's flexibility to rapidly configure a case management solution to improve contractor onboarding.

Take away: The point-and-click configurability within OnBase proved invaluable to the IT personnel building the application. Now, The Judge Group has improved efficiency by streamlining onboarding, accelerating application timelines and scaling the platform it already owns for future growth.

[GET THE FULL STORY »](#)



□ Purchasing

OnBase for purchasing means instant access to the information team members need, like price quotes, invoices, proposals and more. With low-code solutions at your fingertips, customized routing processes and supplier management workflows can be created and deployed quickly and easily.

SUPPLIER MANAGEMENT

22. Track and manage supplier information as well as provide views into planning for the goods and services third parties provide to your organization.

“

We realized immediately the power OnBase has, in that we could build just about any database application we needed while replacing old applications that were going to be sunset.

”

Sean Lemon, National Project Manager, UFP

CUSTOMER HIGHLIGHT

UFP, a wood and wood product manufacturer, relied on scattered spreadsheets and aging database applications to track and manage business processes. With more than 80 plants in North America, it wasn't sustainable. The company turned to OnBase, which was already being used in a few departments, to create solutions for case management applications, such as capital expenditure, storm water, lease and customer management.

Take away: While serving different purposes, UFP built all of the applications on one OnBase platform. Previously, the team went to developers for every request — no more. Now, the team can build their solutions themselves.

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Customer service and support



You know the importance of the customer experience. In today's modern business environment, you need processes and systems in place to deliver on customer expectations at a higher level than ever before.

COMPLAINT MANAGEMENT

- 23.** Track any complaint made against an object, situation, human interaction, etc.
- 24.** Assign and manage tasks to handle the complaint, and provide visibility into the resolution.

CUSTOMER REBATES

- 25.** Manage the entire rebate process, from the moment a consumer uses a rebate all the way until it's acknowledged by the vendor's accounting department.

“

The WorkView application allows the Medicaid reps to quickly retrieve and duplicate recent ride requests, something that was not available in the previous application.

”

Matt McLaughlin, System Coordinator, Priority Spectrum Health

■ CUSTOMER HIGHLIGHT

Priority Spectrum Health, a Medicaid provider of non-emergency transportation to individual, family and employer-group members, wanted a technology solution to guarantee accuracy and convenience. After having tremendous success with OnBase in other departments, Priority Spectrum Health expanded the platform. After expansion, the solution automatically sends a notification to the transportation vendor with all of the logistical information. Should an update or change occur to that appointment, OnBase also automatically notifies all parties involved — the member, vendor and provider.

Take away: Priority Spectrum Health took its success with OnBase, and used the built-in low-code capabilities to build itself a new solution that ensures a seamless and reliable experience for both members and providers.

LEARN MORE: BETTER APPLICATIONS, FASTER »

IT support

When you make tech easier with a low-code solution, you're bringing your entire technology ecosystem together. This means better collaboration, simpler licensing, less IT sprawl and heightened return on investment (ROI).

ASSET MANAGEMENT

- 26. Connect and centralize all of the information and work requests related to the procurement, maintenance and repair of IT assets.
- 27. Make documents easily accessible to equip IT staff with the content needed to respond effectively to service requests and track those responses.



HELP DESK (IT SERVICE TICKETING)

- 28. Standardize the IT service and request process with electronic forms.
- 29. Centralize and track all of the information related to a single request in real-time to accelerate resolution times and improve service levels.



“

In the past, John Carroll has struggled with the support challenges of one-off, dated and difficult-to-use workflows. Through our partnership with Hyland and the strength of the OnBase platform, we have quickly developed multiple, easy-to-use campus-wide solutions without significantly increasing our support efforts. With OnBase, there is no coding or scripting needed for design. It's all point and click with one-click publishing.

”

Mike Bestul, Chief Information Officer, John Carroll University

CUSTOMER HIGHLIGHT

John Carroll University (JCU) was using a dated solution at the front-end of its critical academic petition process, and staff suffered from poor visibility and reporting. Instead of creating another niche application to resolve its petitions, JCU brought on OnBase, knowing the single platform would grow over time to help solve challenges campus-wide. Now, with the academic petition process centralized in the Office of the Registrar, service to students and faculty, as well as the accuracy of the student record, have greatly improved.

Take away: After seeing the flexibility and potential of OnBase in the Registrar's Office, JCU began efforts to deploy the solution across the institution. In just 10 short months, JCU's lean team of 1.5 OnBase administrators was able to release nine major solutions across campus. The University now has a backlog of requests from many departments asking to use the solution.

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Sales

With the low-code flexibility of OnBase, you can create your own CRM solution or integrate with major CRMs like Salesforce.

CUSTOMER RELATIONSHIP MANAGER (CRM) SUPPORT

30. Leverage CRM-like capabilities, such as sales pipeline monitoring, bidding qualifications management, project management and support tracking to add value to your customer strategy.

“

The key to unlocking productivity gains and improving customer experience lies in embracing a modern content services strategy that leverages low-code application development.

”

Bill Priemer, President and CEO, Hyland

CUSTOMER HIGHLIGHT

Hyland is constantly evolving as a business. Like our customers, we need the right solutions to match the scope of the problems we're addressing while making smart use of resources and keeping costs in check. That's why we've come to rely on OnBase as our low-code, rapid application development platform. We use it to create purpose-built solutions that fill the gaps between our core systems (i.e. Salesforce for CRM, Workday Financials for accounting, UltiPro for HR).

Take away: At Hyland, we run more than 175 OnBase solutions to address everything from invoice approvals to office supply requests, with another 25 projects in the pipeline. With OnBase, we can build something specific and versatile without having to fully custom-code it.

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Legal department

Support a variety of legal compliance efforts with a complete view of information, including all of the tasks, activities and correspondence surrounding these processes. Applications can include:

LEGAL COMPLIANCE MANAGEMENT

Use OnBase to rapidly build efficiency-driving applications that will help bring visibility to:

- 31. Environmental case management and issue tracking
- 32. Federal conflicts
- 33. Incident management
- 34. Investigations — audit cases, records, policies and procedures



CONTRACT MANAGEMENT

- 35. Manage the entire lifecycle, from contract request and authoring to execution and renewal.
- 36. Automate approval, routing and escalation tasks to speed processing, and increase visibility into contract revisions and status.



“

We created efficiencies, increased accuracy and lowered costs through structured processing. This allows us to continue to move quickly to provide great service to our members.

”

Heather Lally, Vice President of Operations, Alliant Credit Union

CUSTOMER HIGHLIGHT

Alliant Credit Union already had an enterprise content management (ECM) system, but it realized it needed a more — a robust platform solution that could extend easily and rapidly across their entire enterprise. They implemented OnBase, and after moving 95 percent of its documentation to electronic, it was ready to go further. The credit union built three mission-critical workflows: HR for onboarding, AP for invoice processing and legal for contract management.

Take away: Alliant’s initial automation experience with OnBase lit the way for a digital transformation. Now, the credit union has streamlined its fraud investigations, integrated with its line-of-business software Symitar and optimized processes across the enterprise.

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Administrative/ management

Your administration team has a lot on its plate. They're asked to do more with less, and with customized OnBase applications built quickly and easily, they can.

MEETING/EVENT REQUEST MANAGEMENT

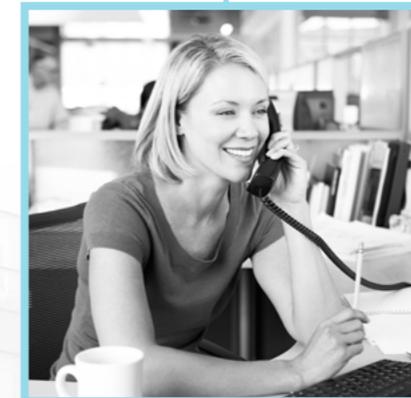
- 37.** Track and assign all meeting and event requests that enter your office via email, phone, fax and letter correspondence.
- 38.** Assign follow-up correspondence to the appropriate people and integrate with calendaring applications like Microsoft Outlook.

RECORDS MANAGEMENT

- 39.** Minimize legal risk by automatically controlling the retention and destruction of business records according to your organization's cutoff periods and retention plans.

PROJECT TRACKING

- 40.** Track and manage a variety of business projects with an application that provides visibility into all steps — and people — involved.



“

We don't look for people with computer science degrees. We look for people that have a drive to fix something that they see broken. People don't have to be scared of the technical requirements. If they can think through a business process, they can create a workflow.

”

Barbara Ebel-Langdon, Senior Application Development Analyst, Priority Spectrum Health

■ CUSTOMER HIGHLIGHT

Priority Spectrum Health, the payer side of Spectrum Health System in Michigan, was hit with a late-in-the-year problem: a previously state-run program was being handed to them, and there was little time to get ready for it. The team realized OnBase could build the user interface (UI) system — faster than their development team could build new infrastructure — so they did. A few teammates and a module resource guide stood up the simple application quickly, to great fanfare.

Take away: Priority Spectrum Health used what they had to rapidly build a custom, high-functioning application that made them the “poster child for the state of Michigan to demonstrate to other payers how it would be done.”

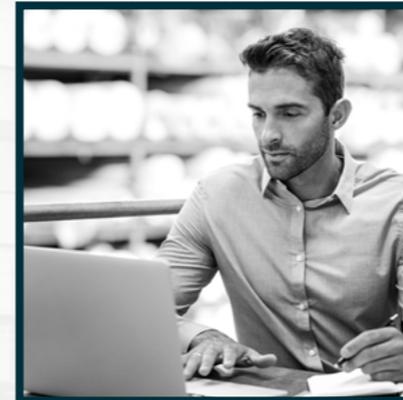
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Facilities management

OnBase helps you transform facility work requests with workflow automation, which allows you to easily dispatch service requests, schedule and track their progress, and report on all activities.

FACILITIES PROJECT MANAGEMENT

- 41.** Provide facilities personnel with access to all related project information in a single view.
- 42.** Minimize the need to jump between electronic and physical storage to search for information, even for projects spanning multiple facilities.
- 43.** Simplify facilities project management, giving employees access to all the project information they need, exactly when they need it.



“

With the unlimited number of solutions we can build on campus, there is so much opportunity to positively impact people’s work, make people’s lives better and help them gain efficiency.

”

Brad Skiles, OnBase System Administrator, University of Texas at Dallas

CUSTOMER HIGHLIGHT

The University of Texas at Dallas (UTD) has been an OnBase user since 2005, and it has expanded its use of the platform to 25 different departments across campus. UTD knew expanding OnBase to the Physical Services branch of the Facilities department could create major ROI, and the platform helped the staff in its tracking of all physical assets on campus — from the desks in faculty offices and classrooms to the chairs in every dining hall.

Take away: By managing and storing files electronically in OnBase, the department gained both efficiency and real estate — three office spaces to be exact — which is in high demand at the growing university.

[GET THE FULL STORY »](#)

As an OnBase user, your commitment to success in the digital world is clear. You saw the coming transformation and adapted by investing in a content services technology that met your needs precisely. Now, the industry and its solutions are once again at a crossroads — a moment in time where the agility and the strength of your current investment are in your favor.

Now is the time to lean into tomorrow's technology by leveraging the full capabilities of OnBase's low-code platform, which will:

- Empower your IT team
- Deploy innovative solutions
- Deliver better customer and employee experiences
- Adapt processes at the pace of business

Your investment in OnBase is just beginning. Ready to take it to the next level?

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