

### DESCRIPTION:

This session is designed for existing OnBase Users and Administrators that know they can get more out of their current deployment. We will cover many topics in detail that can be easy wins on the path to Continuous Process Improvement. Much of the focus will be targeted toward existing Billing, Credit, HR and Fleet Document Procedures. We will cover the planning that is required and the details that can make these small and large projects successful.

The session will start with two presentations from Producers just like you. They will share their experiences on their journey in process improvement.

This is a “Must Attend Session” for any OnBase User, Administrator, Technology Manager or Operations Manager.

NOTES: This class will benefit current OnBase Users and Administrators and individuals that are looking for efficiency improvement across the Enterprise.

### TOPICS:

#### ShareBase

- A new product from Hyland Software
- Can be added to eliminate emailing of invoices and the attachments that are subject to being blocked by your customers email security
- Sends them an email notification with a link to the new invoices in the Cloud
- Your customer can also retrieve all invoices for a period of up to 2 years by logging into the secure Cloud site at their convenience
- ShareBase can also be used to send miscellaneous documents to external people through a secure method
- Great for Customer Proposals, Legal Documents, Financial Documents, etc.

#### OnBase Cloud Options

- Learn how you can move your OnBase System from your existing datacenter and servers to a hosted solution in Hyland’s Cloud System
- Remove the requirement for upgrades, hardware replacement and security concerns
- Learn how to move OnBase to your own AWS or Azure host

#### Workview and Case Management

- See how OnBase can be used for custom application development projects that do not fall into the category of an independent Software Application
- Customer Credit and Rebill
- Time off requests
- Vehicle document and information management and processes
- Employee Onboarding
- Safety Violation Tracking
- Training Class and Certification tracking
- New Vendor Creation Process
- New Customer Credit Checking and Approval Process



### **Advances in Scanning**

- Desktop Scanning
- Unity Scanning
- Email Import Processes
- Production Scanning
- Disconnected Scanning
- Web Scanning
- Subtopic

### **OnBase Improvements and Product Enhancements**

- The most current enhancements will be covered in detail
- An up to date road map for OnBase will be discussed

**Additional Topics will be added leading up to Elevate**

