



WORKBOOK

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.



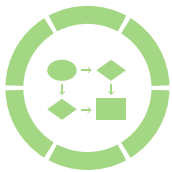
Capture

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



Integrate

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.



Manage

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.



Measure

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.



Access

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.

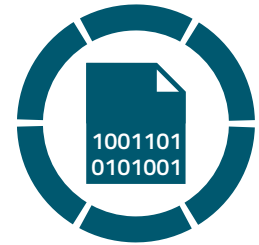


Store

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.



Paper

List any paper HR documents you reference that aren't stored in OnBase:

OnBase can capture these documents right at the point of origination.

Where could you eliminate the cost of printing, storing and/or shipping?

Electronic

Check the electronic documents and data types you reference that aren't currently in OnBase:

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 | _____ |

By capturing important electronic documents and data, you eliminate time wasted searching in multiple locations for information.

Data

Think about the systems where manual data entry occurs in your HR department.

Where does this data originate?

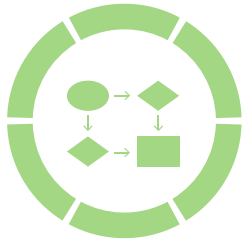
Which system(s) do people manually type data into?

| | | |
|--------------------------------------|---|---------------------------------|
| <i>Employee onboarding documents</i> | → | <i>Manually typed into HRIS</i> |
| _____ | → | _____ |
| _____ | → | _____ |

OnBase can capture data from electronic forms or imported documents. Additionally, these documents can be automatically classified for automated data extraction and validation. You can then send the extracted data to other back-end systems and use it to automate the indexing of the documents in OnBase.

How will your HR processes benefit from electronic data capture?

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

Structured processes that can be mapped on a flowchart – those with predictable steps and outcomes – can be optimized and improved with OnBase. Leveraging Workflow and other tools, OnBase automates repetitive tasks while delivering meaningful exceptions to the right people at the right time.

List your structured processes that could benefit from OnBase. Then, to the right of each, check the key capabilities that you could use to improve each process.

| | 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 |
|---------------------------------------|--|---|---|--|-------------------------------------|-------------------------------------|
| <i>Employee onboarding processing</i> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| _____ | | | | | | |
| _____ | | | | | | |
| _____ | | | | | | |
| _____ | | | | | | |

Once a business decision is made, how do you communicate the decision and compose the documentation?
(e.g., letters, statements, etc.)

Manually Automatically

Manage Data


Even in your automated processes, there are steps that require you to gather and manage data. Your HR staff must use discretion and make decisions to manage exceptions, cases and unpredictable processes that involve many tasks, people, documents, events, dates, etc.

What challenges do your knowledge workers most often face?
Check all that apply.

- | | |
|--|---|
| Excessive use of spreadsheets | Inability to accurately report on process status |
| Lack of collaboration | Multiple and/or conflicted data sources between departments |
| Struggle to delegate tasks | Difficulty tracking related documents |
| Disconnected documents, data and folders | Large amounts of dates and expirations to manage |

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



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

Check all that apply.



HRIS



Lotus Notes®



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?**


Check 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?**

Check all that apply.



Organize with folders and file cabinets



Collaborate and add notes



Manage revisions and versions



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.

In the office

 **With us, it's personal.**

In the OnBase Unity and Web clients, your users have the ability to customize their OnBase homepages – putting the documents, forms, business processes and reports that are important to them right at their fingertips. What would you choose?

Personalize your page

| | |
|-----------------|-----------------|
| eForm: | Reading Groups: |
| Workflow Queue: | |
| Custom Query: | Other: |

List the items your HR staff wants immediate access to:


eForms (e.g., new hire forms, time off forms)

Workflow queues (e.g., approval queue)

Custom queries (e.g., open employee performance reviews since staff members were hired)

Reading groups (e.g., policies and procedures)

Other

 **Working in another application? Stay there.**

OnBase integrates with virtually any business application, meaning that your users can access content and interact with business processes directly from the familiar screens of critical HR applications.

Do your employees often need to access documents and information not found in your existing HR application?

List your employees:

HR staff position

List how they access necessary documents and information:

| | | |
|-------|---|-------|
| _____ | → | _____ |
| _____ | → | _____ |
| _____ | → | _____ |
| _____ | → | _____ |
| _____ | → | _____ |

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 access information?
Check all that apply.



Smartphone



Desktop



Windows® Tablet



iPad®



Laptop

Who in your organization could benefit the most from access to OnBase on a mobile device?

Who
 Employees

Device
 Smartphones

What processes could your users drive forward faster if they could continue them offline?

Who
 Recruiting manager

Process
 Reviewing job applicant resumes

Extended Access

Having access to all the content you need – when you need it, wherever you are – is great. But what about those instances when people outside your organization need access to your content as well? Bridge the gap between you and your external stakeholders – including job applicants, employees, auditors and anyone else who needs to interact with your content. Reduce the burden on customer service by providing these individuals with self-service options.

Below are a few options that OnBase offers for extending access beyond the walls of your organization. Note here who could benefit (e.g., job applicants, employees, auditors, etc.) and what they would access.



External web access
 (through your online portal)

Who
 Job applicants

What
 Copies of resumes and cover letters



Direct links to OnBase documents in an email

Who
 Employees

What
 Policies and procedures

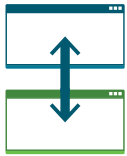
Signatures

OnBase integrates with DocuSign® and CIC Ceremony™ Server. This enables you to electronically obtain signatures from people outside your organization in the cloud. Which processes require external users to sign documents?



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 | Upgrade: 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* |

*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

MS Outlook®
MS Office Business Applications
MS SharePoint®
Google Services
IBM Notes®
Novell GroupWise®



There is a purpose-built integration for you. These integrations are built directly into the application and will solve these issues:



Switching applications



Multi-step uploads

Enterprise Applications

Oracle PeopleSoft Enterprise™
Infor Lawson™
SAP™
Oracle E-Business Suite™
Delttek Costpoint®
Check OnBase.com/Community for more



There is a purpose-built integration for you. These integrations are built directly into the application and will solve these issues:



Switching applications



Duplicate data entry



Data out of sync

My application was not listed on this page or on OnBase.com/Community. No problem! Let's pick the right integration tool for you.

Do you want to integrate without writing or maintaining custom code?

Yes

No

Pick the issues you want to solve:



Data out of sync



Duplicate data entry



Switching applications



You need a data-level integration

The Enterprise Integration Server (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.



You need a screen-level integration

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.



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



Monitor

A. _____

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.



Audit

B. _____

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.



Report

C. _____

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?


Why?

What information in HR do you need to regularly verify the existence, accessibility and accuracy of?


Check one.



Report

 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 / 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?

 What is your current method of managing these requirements?

Protect.....

Online redundancy is an inherent characteristic of OnBase, ensuring that your content isn't vulnerable to catastrophic events.

 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?

 For data in your database, have you implemented database backups, log shipping, mirroring or clustering? If not, why?

Secure.....


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?

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?

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?

Do you require https encryption to protect your data as it's transmitted across the internet?

Yes No




IDT

putting paper in its place

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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: **Paul E. Szemplinski**

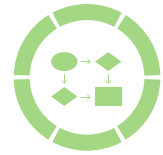
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Learn more at OnBase.com/HR »



Capture



Manage



Access



Integrate



Measure



Store