

capture · store · search · retrieve · collaborate · manage · distribute · comply



engage. empower. **evolve.**™

OnBase®

a Hyland Software solution



“From the very beginning employees loved OnBase. . . Not only will this help us reach our customer service goals, but we expect savings in shipping alone during the first year of Phase 3 to total approximately \$500,000.”

- Theresa Gonyo,
Director of Data Services
Virginia Department of Motor Vehicles

engage. empower. evolve.™

OnBase® is a fully integrated enterprise content management (ECM) software suite that combines core capabilities such as document imaging, electronic document management, workflow, COLD/ERM, e-mail archiving and records management. Organizations can deploy OnBase onsite as either traditional client-server application or as a Web-based application accessed via a standard browser. Alternately, OnBase OnLine offers a full-featured OnBase application hosted in a world-class data center.

From content creation through its ultimate destruction, OnBase enables organizations to capture, route, manage, share and archive high volumes of corporate information critical to business operations, audits and customer service. Eliminating low-value manual tasks and making all content instantly available from a single, easy-to-use interface increases employee productivity and operational efficiency. OnBase

complements its core ECM functionality with specialized solutions for specific vertical markets and is backed by development, implementation and support personnel with expertise in a variety of vertical markets and business processes.

In addition to lowering operating costs, the efficiencies realized through OnBase enable organizations to reallocate resources to higher value activities, promote revenue growth, increase customer satisfaction and improve employee morale. Moreover, the process integrity realized by standardizing, documenting and automating content-driven processes with OnBase facilitates the creation of a solid governance, risk and compliance framework. To further reduce corporate risk and support business continuity, OnBase BackStop offers database validation, backup and recovery services to ensure the integrity and availability of an OnBase database.

“I don’t know that we will ever be entirely paperless, but once our employees grasped how OnBase could help them, everyone including the staff that delivers mail had suggestions for how we could put even more work into the system.”

- Carl Rynders
System Administrator
R&R Insurance Services, Inc.

RELEVANT SOLUTIONS, REAL RESULTS

OnBase helps customers derive business value without abandoning existing technology infrastructure or limiting future purchases. Organizations using OnBase report the following benefits:

Lower Operating Costs: OnBase eliminates much of the overhead costs needed to support physical documents such as shipping, file cabinets, printers, copiers, fax machines and offsite physical storage facilities. In addition, using OnBase to automate important business processes reduces the labor required to complete them.

Collaboration: OnBase promotes greater collaboration by providing simultaneous, secure, real-time access to content regardless of users' locations.

Reduced Cycle Times: Eliminating the delays and inefficiencies of manual processes increases productivity in measurable ways such as competitive advantage in securing new business, collecting early pay vendor discounts and lowering the unit costs of providing superior products and services.

Improved Customer Service: OnBase empowers customer service representatives to resolve issues on the first call with the most accurate and timely data. OnBase also allows organizations to cost effectively provide customer self-service with secure Web-based access to important documents such as billing statements, medical records, insurance claims forms and contracts.

Support Governance, Risk and Compliance Initiatives: OnBase supports regulatory compliance initiatives and minimizes risk by enabling organizations to access content securely, standardize business practices and retain content based on internal policies and quality assurance standards such as ISO 9000 or regulations such as HIPAA, U.S.A. Patriot Act, Gramm-Leach-Bliley and the Sarbanes-Oxley Act of 2004 (SOX).

MARKETS SERVED

Hyland Software has affiliations with a global network of more than 200 value-added resellers, integrators and private-label partners. Both the unique architecture of the software and diversity of expertise among the company's channel partners have allowed OnBase to be implemented at a remarkably wide range of commercial and public sector organizations.

BUSINESS SOLUTIONS

- Accounts Payable
- Accounts Receivable
- Credentialing
- Contract Management
- Customer Service
- Disaster Recovery
- E-commerce
- Electronic Statement / Bill Presentment
- Exceptions Management
- Expense Reporting
- Human Resources
- Internal Audit
- Mail Handling / E-mail Archival
- Records Management
- Sales Management

COMPLIANCE SOLUTIONS

- Basel II
- Bill 198
- FAST
- FDICIA
- FERPA
- FLSA
- Gramm-Leach-Bliley Act
- HIPAA
- IBPS
- ISO 9000 - ISO/TS 16949 - QS 9000
- NAIC
- OSHA
- Sarbanes-Oxley Act
- U.S.A. PATRIOT Act

INDUSTRY SOLUTIONS

Construction

- AP/AR
- Audit & Compliance
- Contract Management
- Customer Service
- Human Resources
- Land Development
- Mortgage
- Purchasing
- Sales

Education

- Higher Education
 - Accounts Payable
 - Admissions
 - Financial Aid
 - Human Resources
 - Registrar
- K-12 Districts & Educational Service Agencies
 - Board & Administration
 - Business & Financial Office
 - Employee Records & Human Resources
 - Student Records
 - Special Education
 - Nutrition Programs

Financial Services

- Commercial Banking
 - Treasury Management
 - Trust
- Community Banking
- Credit Unions
- Investment Management
- Lending
 - Commercial
 - Consumer
 - Education
 - Mortgage

Government Solutions

(Local, State and Federal)

- Affordable Housing
- Criminal Justice
- Economic Development
- Finance and Administration
- GIS
- Human Services
- Natural Resources
- Public Health
- Public Safety
- Public Works
- Risk Management

Manufacturing

- CAD, Design Change Management
- ERP Augmentation
- Human Resources
- Order-to-Cash
- Procure-to-Pay
- Quality Management

Healthcare

- Business Office Operations
 - Accounting
 - Human Resources
 - Compliance Assistance
- Medical Records
 - Deficiency Management
 - EMR Integration
 - Health Information Management
 - Physician Completion
- Revenue Cycle Management
 - Coding
 - Patient Accounting
 - Registration

Insurance

- Agency Management
- Claims Processing
- Customer Service
- Financial Management
- Forms Management
- Human Resources
- New Business Applications
- Regulatory Compliance
- Risk Management
- Underwriting

Transportation

- Billing
- Claims Processing
- Contract Negotiation
- Dispatch

Utilities

- Contracts
- Customer Service
- Payables and Receivables
- Remittance

“When you’re responsible for managing records for the public, how do you put a dollar value on the ability to provide someone with a copy of an accident report or other important document in seconds?”

- Donna Fleming
Records Supervisor
Broward Sheriff’s Office

THE ONBASE DIFFERENCE

One Product, Countless Solutions: Unlike many ECM offerings, OnBase is not a collection of acquired technologies. It is an organically developed suite of ECM applications that uses the same code base, user interface, content repository and security and administration modules. Deploying a single application suite to meet multiple needs reduces administrative overhead and training costs and accelerates end user adoption.

Ease of Use: Designed to enable new users to begin working with OnBase documents with only a few minutes of instruction, the OnBase interface can be configured to meet the specific needs of all the workers in an organization. What a user sees when they log on to OnBase can vary dramatically based on configurations determined by the administrator and/or the user. Though the documents and their underlying organization and integrity don’t change, a user may see a retrieval dialog window, a custom query, tabbed folders or all work items displayed in a customized portal-like view.

Ease of Integration: OnBase features an array of options to content- and workflow-enable your existing IT investments. The OnBase Application Enabler™ module rapidly integrates OnBase with text-based, Java™, Windows®, Web-based and host applications without the need for custom coding. OnBase also features a rich set of

application programming interfaces (APIs) to facilitate more complex integrations with enterprise, Web and legacy applications. In addition, OnBase offers data processors to support standard data exchange formats used in industries such as healthcare and financial services.

Configurability: Organizations can configure OnBase using point-and-click functionality, giving business users, not just programmers, the ability to configure, deploy and modify sophisticated ECM solutions without being locked into a rigidly coded application.

Secure, Scalable and Reliable Architecture: OnBase maintains a high level of security by creating a custom set of product rights and privileges for each user group. The OnBase architecture provides scalable and reliable access to OnBase content repositories and backward compatibility with existing OnBase content, security, user group, database and file storage configurations.

Comprehensive, Modular Solution: ECM is strategic technology with enterprise-wide applicability but, for budgetary and mindshare reasons, is deployed tactically to meet specific departmental needs. OnBase’s scalable but modular architecture addresses this reality by supporting department-level installations that deliver quantifiable results that can then scale and be replicated for thousands of end users throughout an organization.

Rapid Deployment: OnBase requires little or no custom coding to implement, so it can be deployed in less time and with fewer professional services than platform-oriented ECM suites. This provides organizations a more rapid return on investment and greater budgetary flexibility to roll out ECM initiatives across multiple departments.

Outstanding Customer Service and Support: Hyland Software consciously fosters a corporate culture in which a commitment to the needs of OnBase customers is the highest priority. From creating new functionality based on feedback from customers to providing educational services, events and user forums, OnBase customers should expect professional, timely and appropriate service.

Vertical Expertise: Whether asking a question about how OnBase can be used for a specific business process or for a technical support call, OnBase customers deal with trained employees who know the specific business application. Experienced, dedicated subject matter experts with specific industry or business process expertise work with customers on a daily basis.



DOCUMENT IMAGING AND DOCUMENT MANAGEMENT

Even the most complex ECM solution relies on solid document imaging and management capability. OnBase provides sophisticated mechanisms for the capture, indexing and storage of virtually any type of document. Once in OnBase, the integrity and security of those documents is protected and verifiable.

OnBase provides numerous options for converting paper documents to a variety of standard electronic image formats and assigning keyword values with maximum speed and accuracy and minimal user intervention. Designed to work with Kofax™, ISIS® and TWAIN-compliant scanning hardware, OnBase Document Imaging includes options for virtually any scenario, from high-volume centralized scanning operations to ad hoc remote scanning at a disconnected site using a multifunction peripheral. A single enterprise-wide OnBase solution can also accommodate a hybrid approach, supporting a combination of low-volume and production scanning and indexing strategies.

For environments in which a client, patient or customer must provide specific documents to support transactions, OnBase also offers Front Office Scanning, a simplified interface for scanning and automatically indexing documents. For instance, in hospital admitting, a clerk is prompted to collect a driver's license and proof of insurance. Instead of copying these documents and sticking them in a file that must be passed from department to department, the clerk selects the appropriate icons from the Front Office Scanning interface to identify the type of document and scans the documents on an individual desktop scanner or one shared by the clerks within the area. The keywords are gathered using Application Enabler.

Similarly, Application Enabler can be used to populate OnBase indexes with values from any line-of-business application with which it is configured. However, OnBase accommodates a number of other methods for automating indexing and reducing labor while ensuring keywords vital to search and retrieval are accurate. Based on unique identifiers, OnBase automatically populates keyword indexes with values obtained from other systems, whether downloaded as a flat text file or created using a hands-off automated workflow.

Additionally, OnBase stores documents generated by third-party imaging and forms processing applications through an open and configurable Document Import Processor (for high-volume, batch input) and OnBase Archival API (for real-time input). Images may also be imported from fax servers.

Images can be converted to text files, and both the original image and the text rendition can be saved for different uses. Text documents can be internally searched and edited with the resulting revisions tracked and stored in OnBase. The text can be used to support full-text indexing, which allows users to search entire document collections for the occurrence of a word or phrase. OnBase also supports bar code recognition for both standard and 2D bar codes.

Documents originating in electronic format, e-mails, Web pages, PDFs and HTML forms can also be managed in a manner that is consistent with other content. The OnBase E-mail Archive works in conjunction with Microsoft® Exchange Journaling to create a searchable collection of all e-mails. OnBase Subscription Server automatically indexes and stores e-mails and corresponding attachments into the OnBase repository and based upon characteristics such as sender and recipient.

Individual users may use the OnBase integration solutions for Outlook®, GroupWise® or Lotus Notes® to import e-mails and/or their attachments into OnBase. Working from within the familiar e-mail interface, users simply drag and drop the desired document into OnBase and are prompted to select the document type and enter the appropriate keywords. OnBase is equally adept at processing internally produced documents, including those from desktop applications such as Microsoft Word or Excel®.

OnBase E-Forms provide a standard means of initiating requests, notifications and other business processes by allowing users to complete and submit online HTML forms that become available for retrieval and routing. E-Forms also can play a central role in workflows, allowing users to create electronic documents to initiate, participate in or complete business processes.

When working with OnBase documents, users decide how to display the search results list and what descriptive information is provided. Once a document has been retrieved and opened, OnBase provides an array of options for viewing, annotating, revising and distributing the document according to a worker's defined rights. To protect the integrity of OnBase documents, EDM Services provides document management and library services (e.g., long-term/persistent checkin/checkout) for application documents and allows users to reference or revise documents even when they are disconnected from OnBase.

Much more than a repository for archived documents, organizations using OnBase can perform critical business tasks quickly, consistently and with less human intervention. OnBase Workflow brings together people, processes and business rules to create competitive advantage, operational efficiency and accountability while standardizing and accelerating processes in which work is accomplished.

DOCUMENT IMAGING AND ELECTRONIC DOCUMENT MANAGEMENT CAPABILITIES

Document Imaging | With production, desktop and disconnected options, OnBase scans, indexes and stores documents as digital images in virtually any environment. Hybrid solutions can be developed to support multiple business activities. Advanced features include distributed capture and indexing capabilities, support for image enhancement and bar code recognition, blank page separation and automatic indexing.

Front Office Scanning | A simple-to-use and customizable solution for capturing customer documents at a point of registration. Indexing can be automated through integration with line-of-business systems.

Workflow | Automates complex business processes according to defined rules, ensures and validates that internal policies and procedures are followed, enhances interactions that require the input of multiple people and minimizes labor and risk associated with manual processing. Features include graphical configuration, alternate routing logic, automatic criteria calculation, rendezvous, simultaneous notification, load balancing, reporting and ad hoc routing.

E-Forms | Enables users to complete and submit online HTML forms that are automatically captured, indexed and stored as documents in the OnBase system. Often used to generate or facilitate automated workflow processes, E-Forms can be configured to be interactive, automatically populate fields with existing data and support database validation.

Document Import Processor | Processes batches of third-party generated documents and their indexes into the OnBase system. Support for scheduling and polling allows for hands-off operation.

E-Mail Solutions | Microsoft Outlook, GroupWise or Lotus Notes users can store e-mails and attachments in OnBase, as well as retrieve documents from the repository, through the standard client interface. Other options include using OnBase Subscription Server to import MAPI-compliant e-mail and/or attachments based on certain criteria (e.g., subject line or sender) or capturing all e-mails sent or received through the Exchange Server using OnBase E-mail Archive.

Virtual Print Driver | Captures the print stream from any printable application (word processing, drawing applications, Web pages, etc.) and stores a permanent copy in the OnBase system for future retrievals.

EDM Services | Stores and manages application files such as word processed documents, spreadsheets and presentations. Features include ad hoc document storage, version and revision control and checkin/checkout even for disconnected users.

For complete module listings and details, visit www.onbase.com.



ENTERPRISE REPORT MANAGEMENT (ERM) AND DISTRIBUTION

OnBase COLD/ERM captures and preserves text-based records such as invoices, purchase orders, statements and reports by processing print streams generated by transactional mainframe or client/server applications. OnBase COLD/ERM offers optional multi-threaded processing for high performance, add-on modules for natively handling PCL, AFP and DJDE data streams and built-in support for report mining.

OnBase provides two methods for defining and configuring COLD/ERM processes. The first provides a traditional ASCII text-based interface allowing the user to define document separation and indexing data, while the second method provides similar functionality via a graphical interface with a facility to “rubber-band” key areas using a simple click-and-drag system.

Because of the way OnBase is designed and the way OnBase users work, ERM functionality is directly linked to all other OnBase functionality, including document management. Reports are stored in the same repository as other documents and can be cross-referenced to allow a user to move from one to another easily. For example, a user might click on a check number in a report to retrieve the check image.

OnBase Industry Solutions provide the ability to process and generate standard industry-specific data exchange protocols including XML, HL7, 835, 837, ACH, X9.37 and more. OnBase can also facilitate interaction with external partners and customers by addressing nearly every conceivable scenario of distributing stored documents, including via Web Services calls, fax, e-mail, printing, CD/DVD or Web publishing. Output can also be easily customized as OnBase offers statement design tools, the ability to designate the page order and format of electronic files and compound statement creation capability.

Several OnBase output modules are specifically designed to be used in combination to dramatically improve the way in which a commercial organization or financial institution distributes bills and statements. OnBase Image Statements creates “compound statements” by taking primary documents (e.g, invoices) and matching them to supporting secondary documents (e.g, signed receipts) for rendering. Features include statement formatting options for both primary and secondary document output (including fonts, headings, auto-naming conventions and range selection), the ability to present multiple secondary documents on a single page (e.g, tags, checks, packing slips and deposit slips) and the ability to switch documentation formats “on-the-fly” on a per-customer basis.

OnBase Document Distribution extends the capabilities of OnBase Image Statements by managing the process of electronic delivery. With OnBase Document Distribution, documents are circulated directly to the intended recipients, eliminating the need for paper, printing and postage costs. OnBase can distribute the statement in TIFF, RTF or PDF (including encrypted PDF) format for e-mail and Web publishing. Document Distribution also provides the option of attaching a customized cover letter, e-mail message or promotional document to a statement.

BUSINESS PROCESS AUTOMATION AND INTEGRITY

Much more than a repository for archived documents, OnBase allows organizations to perform critical business tasks quickly, consistently and with less human intervention. OnBase Workflow brings together people, processes and business rules to create competitive advantage, operational efficiency and accountability while standardizing and accelerating processes in which work is accomplished. OnBase Workflow is an extremely powerful, versatile tool that routes documents and work according to pre-defined rules (system work) or ad hoc (user work) decisions. Entirely point-and-click configurable, OnBase Workflow can easily integrate with other business applications.

OnBase E-Forms provide a standard means of initiating requests, notifications and other business processes by allowing users to complete and submit online HTML forms that become available for retrieval and routing. E-forms can play a central role in workflows, allowing users to create electronic documents to initiate, participate in or complete business processes. By creating interactive e-forms that guide users through a process and automatically gather data, OnBase users have increased productivity and decreased training requirements.

OnBase Workflow can also be triggered directly from line-of-business applications or Microsoft SharePoint® portal that have been integrated with OnBase using the point-and-click configurable Application Enabler. Workflow actions can be seamlessly added to an existing application and prompted automatically or as specified by a user. Because they require little or no modification to existing work tasks, the benefits of workflow can be realized with virtually no impact on employees.

CONTENT-ENABLING ENTERPRISE AND LEGACY APPLICATIONS

Because the data in an ECM system affects multiple areas of an organization's operations as well as that of customers and partners, OnBase offers an array of solutions for sharing information with internal applications and external partners, including Web Services capability. OnBase's integration and data exchange tools can be rapidly deployed to complement your existing technology infrastructure while preserving the flexibility to adapt to unforeseen future needs.

The OnBase Application Enabler* "content-enables" the existing transactional software applications organizations use every day, such as ERP, CRM, accounting or other line-of-business applications, and operates as if ECM capability were an enhancement to the application itself. Hundreds of applications have been successfully integrated using Application Enabler, ranging from specialized vertical solutions to enterprise applications like Oracle®.

Using Application Enabler, content in the OnBase repository can be retrieved from the interface of the line-of-business application with the click of a mouse, giving users immediate access to supporting documents with virtually no change to their existing work processes.

Application Enabler also facilitates the indexing of incoming documents. If a document has already been scanned or imported into the system, operators can assign keyword values from the line-of-business application to a document by pressing a button. These values can be printed onto bar-coded separator sheets for automated indexing of documents that haven't been scanned yet. Application Enabler can also be configured to generate an automated workflow process from within a line-of-business application. Because it is point-and-click configurable, Application Enabler can be quickly adapted to new software versions or entirely new applications without additional product or programming costs.

Specialized solutions can be built using the powerful OnBase application programming interfaces (APIs). OnBase APIs enable remote or local applications to interact with the OnBase content repository and Workflow using standard COM, DCOM, HTTP and SOAP protocols.

OnBase also has dedicated integration solutions for market-leading applications from vendors such as SAP®, Lawson™ and ESRI™. Modules specially designed to integrate with various forms processing, fax

server, report mining, content-addressed storage and other hardware and software applications are available. Microsoft SharePoint users can search, retrieve, view and interact with the OnBase documents, business processes and collaboration spaces they need to perform their primary job responsibilities from within a SharePoint Web page using the Web Parts for Microsoft SharePoint module. Leveraging standard functionality of the OnBase Web Server, Web Parts can expose workflow queues, custom queries, interactive graphical representations of OnBase WorkView objects and more through SharePoint.

**To ensure customer satisfaction, Hyland Software qualifies all Application Enabler integrations.*

WORKFLOW AND E-FORMS CAPABILITIES

Workflow | Automates complex business processes according to defined rules, ensures and validates that internal policies and procedures are followed, enhances interactions that require the input of multiple people and minimizes labor and risk associated with manual processing. Features include graphical configuration, alternate routing logic, automatic criteria calculation, rendezvous, simultaneous notification, load balancing, reporting and ad hoc routing.

E-Forms | Enable users to complete and submit online HTML forms that are automatically captured, indexed and stored as documents in the OnBase system. Often used to generate or facilitate automated workflow processes, E-Forms can be configured to be interactive, automatically populate fields with existing data and support database validation.

APPLICATION INTEGRATION CAPABILITIES

Application Enabler | “Content-enables” third-party applications, making it possible for users to double-click on specified fields within a line-of-business application and retrieve related documents from within the OnBase system. It also facilitates automated indexing from these host, text, Windows, Web or Java applications. Functionality such as bar code generation and Workflow can also be embedded in an existing solution with Application Enabler. A dedicated version for use with Lawson Accounts Payable is also available.

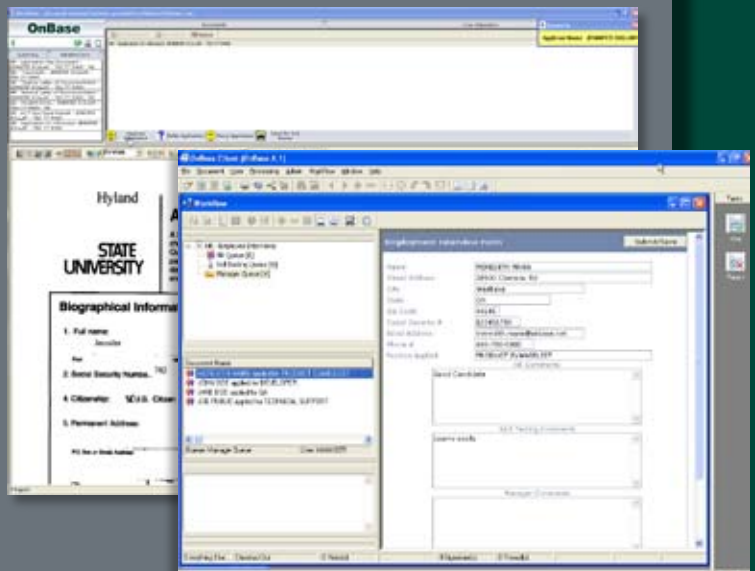
OnBase APIs | Enable remote or local applications to interact with the OnBase content repositories and Workflow queues using standard COM, DCOM, HTTP and SOAP protocols.

OnBase Connector 2.0 for use with SAP ArchiveLink® | A SAP-certified API interface with SAP ArchiveLink makes it possible to use OnBase as a repository for archived documents (including SAP-generated data, scanned images and other unstructured documents) and synchronizes keywords between SAP and the document images.

Web Parts for Microsoft SharePoint | Leverages point-and-click configurable functionality of the OnBase Web Server that allows users to create personalized views of OnBase content and processes with Web portal components called “portlets.” Microsoft SharePoint users can search, retrieve, view and interact with the OnBase documents, business processes and collaboration spaces they need to perform their primary job responsibilities from within a SharePoint Web page.

Integration for ESRI ArcIMS™ | Provides users with the capability to link OnBase documents to locations on maps stored in ESRI ArcIMS applications.

For complete module listings and details, visit www.onbase.com.



CREATING A GOVERNANCE RISK AND COMPLIANCE FRAMEWORK

Managing the complete life cycle of business-generated content from creation through its ultimate disposition is key to maintaining corporate accountability and creating a governance, risk and compliance (GRC) framework. In many cases, those initiatives rely at least in part on human actions or interactions, which had previously been difficult to document and automate. In addition to the process improvements realized with OnBase, users can create a GRC framework that provides a front-end view of compliance project management, imposes business rules and consistent policies and delivers a solid back-end archiving and retention solution.

At the front end, organizations use OnBase WorkView to build applications for tracking and managing a wide range of business interactions whether they are case-based (all interactions based on a person's case file), project-based (all interactions related to a group of people working to complete a common task) or process-based (all interactions related to a group of people participating in a process).

WorkView manages these recorded interactions and enables documents to be linked to the interactions. WorkView is suited to uses such as supporting ISO compliance and corrective actions, issue tracking and internal auditing. It is also the underlying technology for the OnBase Risk and Compliance Solution, which is used to document and test internal controls related to complying with regulations such as Section 404 of the Sarbanes-Oxley Act. Existing documentation can be automatically imported into WorkView, eliminating the need to recreate entire projects.

Employees can use OnBase Collaboration to create virtual workspaces to share documents, ideas, conversations and even WorkView objects by centralizing resources and threaded conversation strings. Collaboration improves decision making and can be preserved as a record of the decision-making process.

Document Knowledge Transfer (DKT) is a way to broadcast these decisions to groups of employees who are affected and validate that they have been notified. For instance, a group of administrators may use Collaboration to define a new Human Resource policy. DKT would then be used to publish the policy to users who are assigned to various Reading Groups. Users are asked to acknowledge that they have read and understand the assigned reading item and can even be asked to provide a password. System administrators can view compliance by document or individual.

OnBase Workflow is often used to automate processes to guarantee compliance with prescribed policies and procedures and ensure consistency. For instance, Workflow can be configured to audit files to verify that all required documents have been received. This might be used to handle complex permitting applications, ensure that all reports have been filed or an employee file has all items needed for payroll.

Because administrators can use it to view both work in progress and the audit trail of past actions, Workflow can also serve as a record of accountability when documenting controls. Depending on the requirements, an approver might be required to affix a certificate-based OnBase Digital Signature. Administrators can identify which documents have been signed with a right-click and verify that no changes were made after the document was signed.

Another tool for monitoring performance is OnBase Report Services, a Microsoft Smart Client application. Optimized, pre-configured reports covering both business and system activity are included with Report Services so that organizations can immediately begin to gain valuable statistics about business processes driven by OnBase.

Consistently purging documents that are outdated or have outlived their retention periods is an important element of a risk mitigation strategy. OnBase supports both static document retention based on a stated period or event-based retention based on another action being taken first (e.g., an employee resigns or a mortgage is paid off). The purging process can be set to run automatically or with human verification and can accommodate a legal hold.

Retention rules can be assigned to documents of all types, including e-mail. Depending on corporate policies and compliance requirements, organizations can use OnBase Subscription Server to automatically index and store e-mails and/or attachments based on specific characteristics. To capture all incoming and outgoing e-mail, the OnBase E-mail Archive works in conjunction with Microsoft Exchange Journaling.

OnBase Records Management allows organizations to manage the retention policies at a folder level once a set of documents has been designated as a record. Both active and closed records can be searched through the same interface as other OnBase content. Records can be checked in and out, and an audit trail can be maintained to document that policies or regulations were followed.

The same records management policies assigned to digital content can also be applied to physical assets using OnBase Physical Records Management, which tracks the actual location of items that simply can't be exclusively stored electronically, such as signed contracts, equipment or evidence.

As long as documents exist in OnBase, they can also be managed and stored using industry-standard mass storage hardware and software applications that support compliance initiatives. Proven integration solutions are available for WORM (write once, read many), content-addressed hardware and other options.

COLLABORATION, COMMUNICATION AND COMPLIANCE PRODUCT CAPABILITIES

WorkView | A flexible tool for building applications to consolidate, track and manage a wide range of case-based, project-based or process-based business interactions, including issue resolution and regulatory compliance. It is the basis of the OnBase Compliance Framework, which provides a template for documenting internal controls and risk testing.

Collaboration | Provides a common workspace for people to share documents, WorkView objects and threaded conversation strings. Through a seamless integration with Citrix® GoToMeeting™, users schedule and can also participate in real-time meetings.

Document Knowledge Transfer | Enables organizations to rapidly distribute content to multiple parties across the enterprise, helping to ensure that written materials critical to job roles, procedures and protocols are read and acknowledged by all affected individuals. Organizations can use this functionality to support compliance strategies targeted toward industry regulations and quality organizations.

Records Management | Facilitates the retention, disposition and destruction of declared records on a folder level. Records can be designated as active, closed or on legal hold.

Physical Records Management | Integrates the management of physical records with electronic content, creating a single, centralized solution. Physical records and content are treated equally, enabling users to rapidly store, manage and retrieve content regardless of location or type.

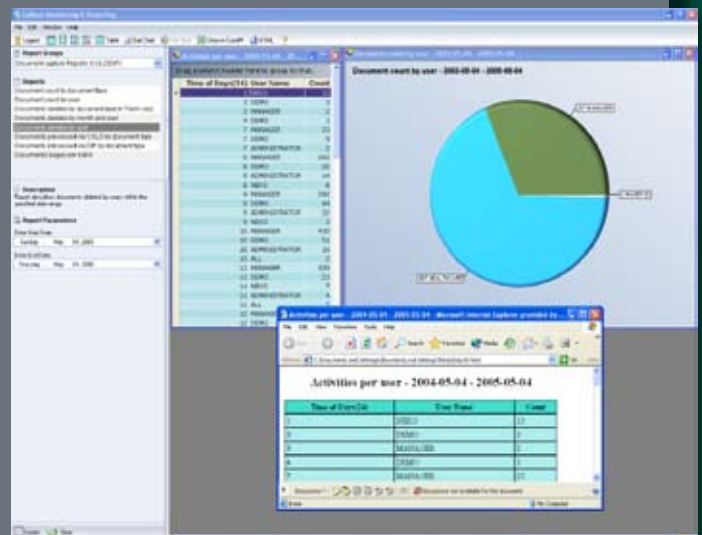
Document Retention | Manages the retention and disposition of OnBase documents according to pre-defined business rules that typically involve the passage of time or the occurrence of an event.

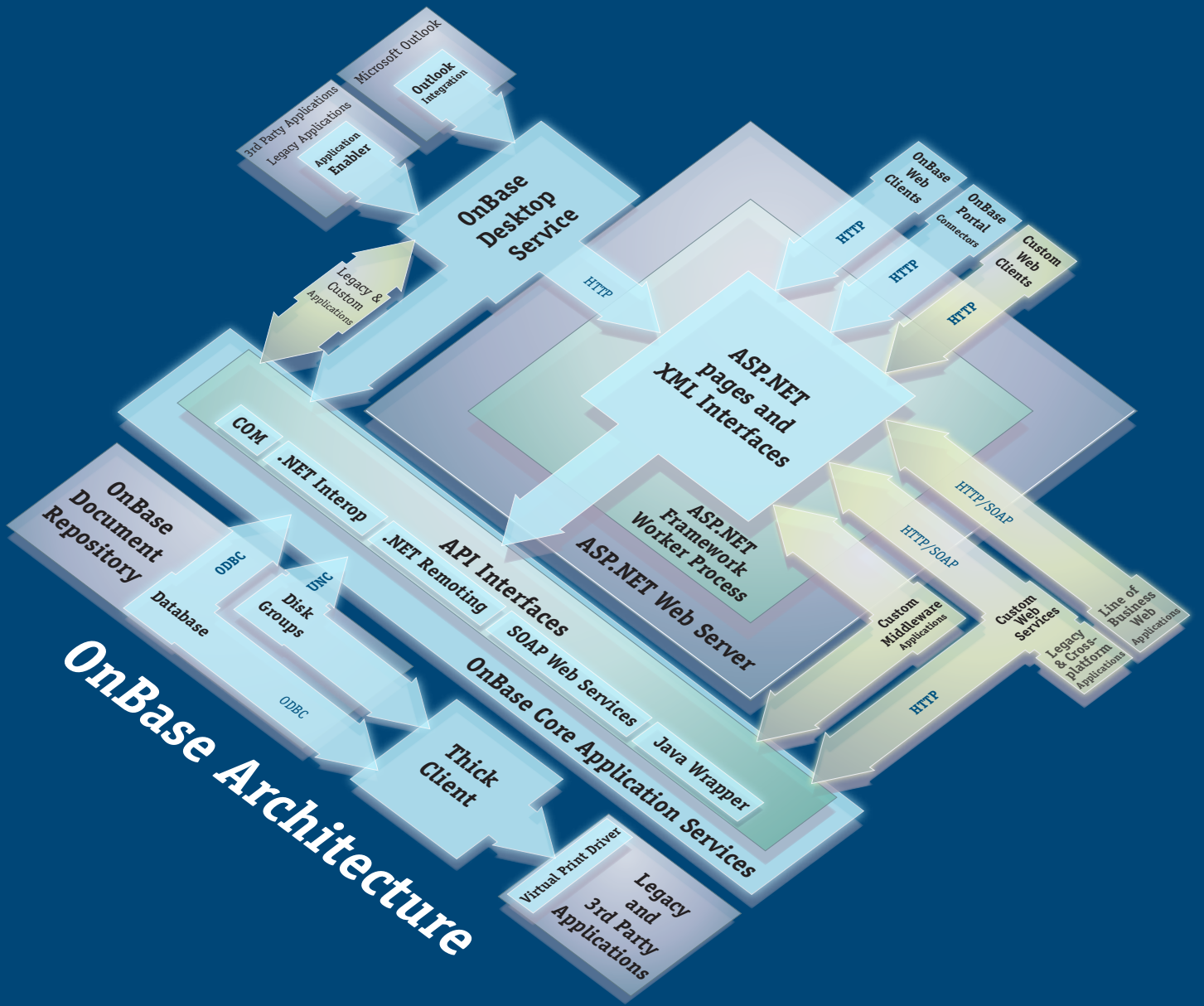
Report Services | Enables organizations to gain valuable statistics about business processes driven by OnBase using a Microsoft Smart Client application. OnBase Report Services provides optimized, pre-configured reports covering both business and system activity.

E-Mail Solutions | Microsoft Outlook, GroupWise or Lotus Notes users can store e-mails and attachments in OnBase, as well as retrieve documents from the repository, through the standard client interface. Other options include using OnBase Subscription Server to import MAPI-compliant e-mail and/or attachments based on certain criteria (e.g., subject line or sender) or capturing all e-mails sent or received through the Exchange Server using OnBase E-mail Archive.

Digital Signatures | Applies a Digital Certificate to any type of document as a signature. Based on rules embedded within the OnBase Workflow module, documents with Digital Signatures can be routed through processes based on the presence of a signature, validity of a document or in certain cases will prompt a user to apply a signature.

For complete module listings and details, visit www.onbase.com.





OnBase Architecture

ARCHITECTURE

The OnBase architecture is built upon the Microsoft Windows and .NET platforms, creating cost-effective models for deploying and developing scalable ECM infrastructure. Separate Web and native Microsoft Windows thick clients are available to access the same OnBase document repository. Cross-platform support allows for the deployment of OnBase with database and file storage servers running on other non-Windows operating systems, including Unix®, Linux™, IBM WebSphere®, BEA WebLogic® and IBM AS/400®.

- Tiered storage model ensuring fault tolerance and redundancy
- FTP, NAS, SAN support
- Optical support (CD, DVD, MO)
- Remote caching via WAN
- Integrated document retention system
- Supports IBM Tivoli® and EMC Centera™ storage solutions

SECURITY

- Windows NT® user/group style security model
- Supports SSL, VPN and SSH connections
- Supports integrated Windows security
- Active Directory® and LDAP support
- Internal password encryption

API

OnBase API and XML interfaces are accessible through

- ASP.NET, ASP and JSP websites using URL-based HTTP requests
- Microsoft COM/DCOM/.NET technologies
- ASP.NET, Visual C#®, Visual Basic®, Visual C++®, Visual Basic Script and JavaScript applications
- Distributed and cross-platform integration using SOAP/XML Web Services
- Java API for native Java application integrations
- Microsoft .NET Remoting wrappers
- Microsoft SharePoint, BEA Plumtree™ and future WSRP portal frameworks
- OnBase Software Development Kit (SDK) is available with interface details, sample scripts and technical documentation

WEB ACCESS

- ASP.NET-based Web/application server platform
- Standard browsers function as secure OnBase Web clients
- ActiveX® and zero-footprint HTML web clients
- Compatible with SSL and VPN secure connections
- Internet Explorer (ActiveX® and HTML Web clients)

WEB SERVER DEPLOYMENT

- Intranets
- Secure supply chain and employee extranets
- Customer-facing support portals
- Deployable as back-end application server for integration of Web-based and third-party legacy applications into real-time, XML-based Web business processes and integrations with straight-through processing systems, exception handling applications, CRM/ERP applications, legacy content management systems and orchestration of cross-platform Web Services
- Requires Microsoft IIS 6.0/5.0 on Microsoft Windows Server 2003/2000


ABOUT HYLAND SOFTWARE

Hyland Software, established in 1991, is a leading provider of rapidly deployable enterprise content management solutions.

As a customer-driven organization committed to providing world-class service and support, the company is dedicated to developing enterprise content management (ECM) solutions that are deployable at both the departmental and enterprise levels. As a result, OnBase is used by thousands of commercial organizations and government agencies to streamline operations, reduce costs, support compliance initiatives and share information with employees, partners and customers.

Headquartered in Cleveland, Ohio, Hyland markets OnBase throughout North America, South America, Europe and Asia.





“Hyland has a good business ethic. OnBase is a great product, but Hyland always welcomes the opportunity for improvement and listens to customers. We also appreciate how easy it is to get in contact with someone who can help you.”

- Christopher Masi
Imaging Center Supervisor
Blue Cross Blue Shield of Vermont



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