

Electronic Document Management (EDM) Services

What It Is

OnBase Electronic Document Management (EDM) Services controls and tracks the modification of documents stored in OnBase through revisions and versions. Through the library services and version control offered in EDM Services, organizations can centralize documents so they are not saved to individual hard drives or file shares. Organizations can centralize the management of critical business documents that are changed by providing offline synchronization for remote users, ensuring that they are always accessing version-accurate copies.

How It Works

Users can save revisions and stamp versions of any document type stored in the OnBase repository. Seamless integration with Microsoft® Office allows users to open, edit, save and access other OnBase functionality related to Office documents, either directly in OnBase or from the native Office application. The ability to view multiple revisions of a single document and make specific revisions available for public access through version control provides a complete audit trail of all changes and allows users to view the specific information they require.

Users can “check out” OnBase documents and store local copies to their desktops through the EDM Briefcase. By checking out a document, other users are able to access the same document with read-only permissions, removing the possibility of simultaneous edits and revisions. Documents stored in the Briefcase can then be revised, reviewed and saved, so that when the user reconnects to OnBase, revised documents stored in the Briefcase are either automatically or manually uploaded and revisions are synchronized. The EDM Briefcase also offers a Reference section to store frequently revised documents or templates as a read-only reference, making them available to users that are disconnected from OnBase without locking out other users. A New Documents section allows users to drag-and-drop documents into the Briefcase for later import into OnBase.

Additional EDM Services functionality includes document templates, image markups and the ability to drag and drop multiple documents from the Windows® desktop into OnBase.

Who Will Benefit

Organizations that want to centralize the storage of evolving business documents can improve control and management of these documents, improving customer service, supporting accountability initiatives and preventing redundant labor.

Technical Features

- Versions and revisions control public and draft access rights
- Office Add-In integrations allow users to stay inside Microsoft Office applications while working on documents stored in OnBase
- Document check-in/check-out
- Automatic upload and synchronization of revisions
- Documents Templates standardize formatting and text copy
- Image markups
- Multiple file drag-and-drop import

Business Benefits

- Manage and control changing documents in one central location
- Maintain security around viewing and editing draft and final documents
- Establish audit control over document changes by tracking complete document history
- Disconnected, remote workforces can access centrally stored information
- Increase user efficiency when users work inside familiar Office applications
- Promote data integrity through document consistency and keyword accuracy

System Requirements

- EDM Services license
- OnBase Client license

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