

ONBASE

E-FORMS

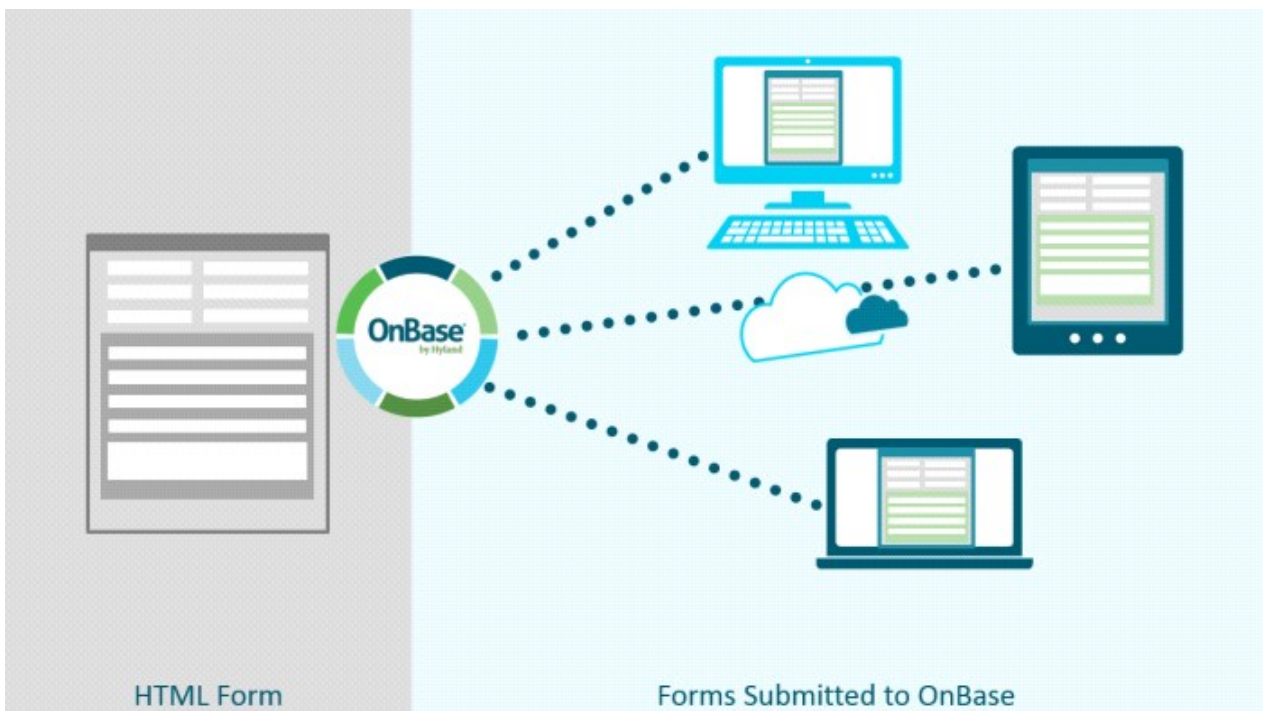
SUMMARY

E-Forms are fully customizable HTML-based forms that can eliminate the labor and cost associated with processing, importing and indexing forms in any business process. E-Forms can also drive business processes in Workflow, improving the visibility of enterprise information and shortening cycle times. Increased speed and accuracy of data capture—along with greater control—increases the value of data across the enterprise.

BENEFITS

- **Save time and shorten process cycles** by capturing data electronically and routing it automatically.
- **Improve accuracy** with data validation at the point of entry.
- **Protect sensitive data** from unauthorized access.
- **Reduce costs** associated with the printing and distribution of paper forms.
- **Eliminate** the delay required to reproduce and distribute paper forms.
- **Automatically provide a record** of access/modification history and current status.

DESIGN



E-Forms are available for OnBase Users and external (non-OnBase) users to complete and submit. External users can securely submit forms via the internet using the OnBase Web Server. OnBase Users can submit forms internally from all OnBase Clients or by using many compatible modules, including: Workflow, WorkView, Integration for Microsoft Outlook and Application Enabler.

APPLICATIONS

- **Applications:** Prospective students, employees, or customers can submit an E-Form application directly from an organization's Web site. By capturing data electronically, organizations can avoid the time and costs required to manually interpret poor handwriting and confirm unclear or incomplete information. After submission, information can be routed to its proper destination immediately.
- **Requests Management:** Processing requests can be a drain on resources for almost any department—from finance to human resources to facilities management. OnBase E-forms can eliminate many of the tasks that add time and cost to processes like maintenance or purchasing requests. With E-Forms, organizations can provide customers or employees with self-service forms that collect the data electronically and automatically route the information through Workflow. Removing time delays that result from staffing or business hour constraints shortens business process cycles so that requests can be processed faster and employees can be more efficient, improving both service and revenue cycles.

KEY FEATURES

- **Index forms automatically** by mapping form fields on the E-Form to OnBase Keywords.
- **Auto-populate form fields** using AutoFill Keyword Sets, Auto-Incrementing Keywords and Document Properties.
- **Cross-reference related documents and perform Custom Queries** right from the E-Form, saving employees time and effort.
- **Design advanced HTML-based forms** that are fully customizable and support advanced programming.
- **Fill out and view** OnBase E-Forms without the use of expensive proprietary software.
- **Unlimited flexibility** in form features and appearance are possible by using standard html to create the form.

INTERFACE

OnBase (OnBase)

File Home Contract Manager Briefcase Electronic Form

Home Personal Favorites Custom Queries Envelopes Certified Records Forms Import Dashboards Mailbox Workflow Approval Management My Reading Groups Approval Viewer Batch Scanning Batch Processing Tracking

Retrieval Query History File Cabinets My Checkouts Documents View Map Templates Geo... Create Dashboards Internal... Workflow Knowledge Transfer Imaging

Forms

HR - Application For Employment

Find

Accounts Payable

- AP - Invoice Coding Form
- AP - Partial Payment Record
- AP - Purchase Requisition
- AP - Vendor Profile

Accounts Receivable

- AR - Customer Profile

Human Resources

- HR - Application For Employment
- HR - Application For Employment
- HR - Benefit Change Request
- HR - Employee Profile
- HR - Interview Guide
- HR - Performance Review

Legal

- LG - Contract Request

Application for Employment

General Information

Name

Applicant ID

Position Applied For

Street Address

City

State

Zip Code

Phone

Email Address

Education History

Name and Location

Course of Study

Years Completed

Did You Graduate

Degree or Diploma?

Employment History

Company Name

Company Address

Phone

An E-Form in the Unity Client

The screenshot displays the OnBase web client interface. At the top, the browser title is 'OnBase 17.0.0.11 [Demo - Not For Production Use] - Internet Explorer'. The user 'Cindy Smith' is logged in. The left sidebar shows a 'Forms' menu with categories: ACCOUNTS PAYABLE, ACCOUNTS RECEIVABLE, HUMAN RESOURCES, LEGAL, and CONTRACTS LIFECYCLE MANAGEMENT. The 'Application for Employment' form is open, featuring sections for General Information, Education History, and Employment History, each with various input fields.

General Information	
Name	<input type="text"/>
Applicant ID	<input type="text"/>
Position Applied For	<input type="text"/>
Street Address	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip Code	<input type="text"/>
Phone	<input type="text"/>
Email Address	<input type="text"/>

Education History	
Name and Location	<input type="text"/>
Course of Study	<input type="text"/>
Years Completed	<input type="text"/>
Did You Graduate	<input type="text"/>
Degree or Diploma?	<input type="text"/>

Employment History	
Company Name	<input type="text"/>
Company Address	<input type="text"/>
Phone	<input type="text"/>
Supervisor Name	<input type="text"/>
Employed From	<input type="text"/>
Employed To	<input type="text"/>
Job Title	<input type="text"/>
Reason for Leaving	<input type="text"/>

An E-Form in the Web Client

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