

ONBASE

COLLABORATION

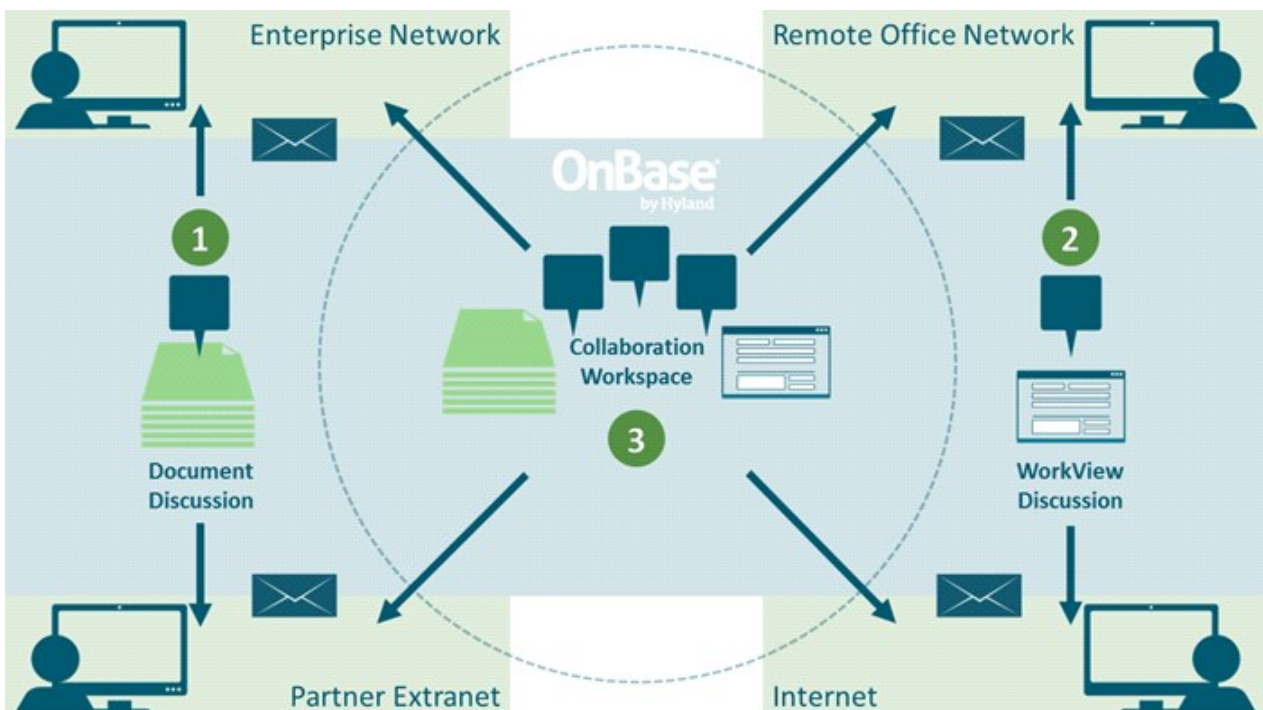
SUMMARY

Collaboration improves the speed and quality of group communications, providing a standardized method in which users can share documents and work together. Users can track their conversations with threaded discussions, invite other users to participate, and manage relevant information on a document or in a virtual workspace. Collaboration provides a centralized location in which users—regardless of their geography—can manage interactions and decision-making to more quickly resolve business process issues.

BENEFITS

- **Provides a standardized method** to manage and store document-level and other discussions
- **Increases speed and efficiency of communications** required for group decision making
- **Reduces dependency on individual communications tools** (such as e-mail, voicemail, fax, etc.) commonly used to manage group discussions and business issue resolutions
- **Captures and archives a traceable history** of group discussions and process issue resolutions
- **Minimizes common barriers to communication** such as different geographical locations and time zones

DESIGN



Threaded discussions can be created and managed on documents (1) and WorkView objects (2) with automatic e-mail notifications. Workspaces (3) can contain multiple documents, WorkView objects and Threaded Discussions within a single interface.

APPLICATIONS

- **Contract Finalization:** Members of a legal department could use Collaboration to manage discussions and decision-making around contract terms and conditions. As items need clarification, colleagues in the Sales department or Customer Service division could be invited into the discussion in order to help answer questions or add customer-related insight and information.
- **Government:** Instead of relying on email, phone calls, and marked-up paper copies to exchange information about a candidate's insurance eligibility, members of a social services organization could use Collaboration to manage the discussions and determination of benefits.
- **Insurance:** Field agents – regardless of their geographic location – could use Collaboration to manage documents and discussions around the claims process, to more easily communicate and participate in the problem-solving process.

KEY FEATURES

- **Hierarchical Discussion Threads** with reply posting capabilities create a running discussion on documents, WorkView objects or within a Workspace
- **Collaboration Workspaces** provide a single interface to manage multiple documents, WorkView objects and related Threaded Discussions
- **Workspace Templates** automate the generation of new Workspaces
- **Granular security** for Workspaces and Discussion Threads is managed at the user and user group levels

INTERFACE

The screenshot displays the Unity interface for a document titled "Packing Slip for PO 990 from OFFICE SUPPLY WAREHOUSE". The document content includes:

Packing Slip
INVOICE NO: 2440
DATE: April 7, 2012
RECEIVED
BY L.R.
of only 99 boxes received

To:
9-Second Foods, Inc.
19000 Quickly Circle
Columbia, MO 65201

| Salesperson | P.O. Number | Date Shipped | Shipped Via | F.O.B. Point | Terms |
|-------------|-------------|--------------|-------------|--------------|------------------|
| Joe Smith | 990 | 4/7/12 | UPS | - | 2% 10; Net 30 |

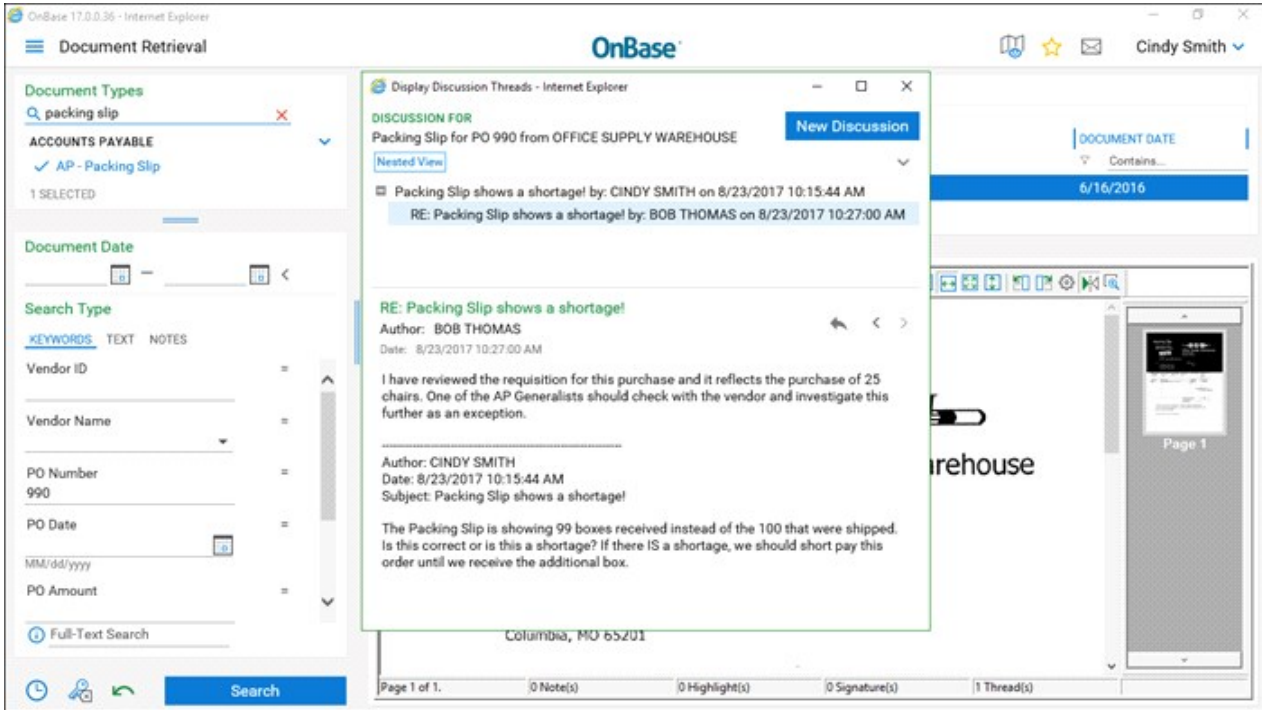
At the bottom, there is a table with columns: Quantity, Description, Shipped, and Received.

Overlaid on the document is a discussion thread titled "Packing Slip shows a shortage!". The thread contains two messages:

- Message 1:** "Packing Slip shows a shortage!" by CINDY SMITH, dated 8/23/2017 10:15:44 AM. The text reads: "The Packing Slip is showing 99 boxes received instead of the 100 that were shipped. Is this correct or is this a shortage? If there is a shortage, we should short pay this order until we receive the additional box."
- Message 2:** "RE: Packing Slip shows a shortage!" by BOB THOMAS, dated 8/23/2017 10:27:00 AM. The text reads: "I have reviewed the requisition for this purchase and it reflects the purchase of 25 chairs. One of the AP Generalists should check with the vendor and investigate this further as an exception."

The interface also shows a "Document Information Panel" on the right side, which includes fields for "Document Type: AP - Packing Slip" and "Document: Packing Slip for PO 990 from OFFICE SUPPLY WAREHOUSE". There is a "Start a Discussion" button and a "Reply to Thread" button.

Discussion Thread interface in Unity



Discussion Thread interface in the Web Client

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