

# ONBASE

## DOCUMENT COMPOSITION

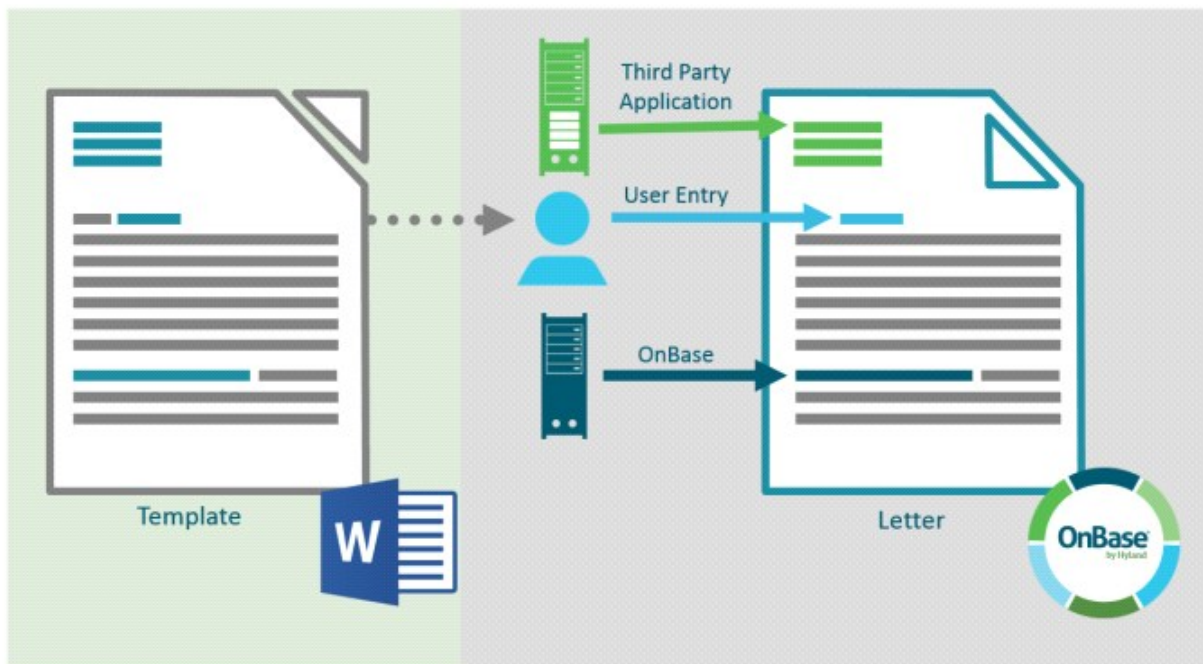
### SUMMARY

OnBase Document Composition improves outgoing correspondence by leveraging existing data—from OnBase or third-party systems—and automating the generation of Microsoft Word documents. Documents are created faster and workers are more productive because they don't have to search multiple information sources and manually produce business documents. Organizations can avoid potential legal and compliance risks by producing accurate, standardized documents and communications.

### BENEFITS

- **Standardizes** document generation to improve accuracy and support legal and compliance requirements.
- **Increases efficiency** by automating the document creation process and centralizing template storage.
- **Promotes data integrity** by pulling information directly from the source, eliminating errors from manual copy/paste.
- **Mitigates risks** associated with freeform document production and manual data entry errors.

### DESIGN



- Even non-technical users can configure document templates. Because the Template Builder is part of Microsoft Word, it leverages the ribbon toolbar and a wizard-driven interface for a pain-free user experience.
- Data from OnBase or a third-party system may be used to populate the composed document. Documents may be created manually by an OnBase user or automatically, without any user intervention.

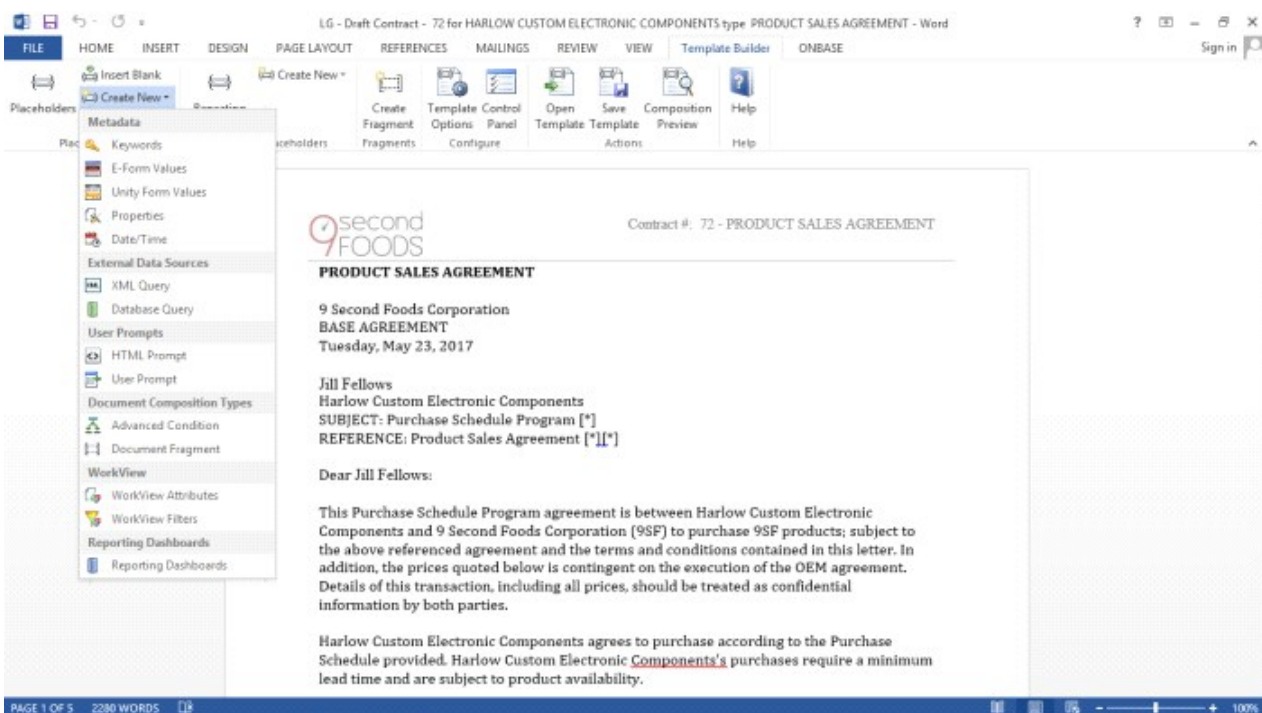
## APPLICATIONS

- **Sales Contracts:** Templates can be configured to pull data from multiple sources (like an ERP or CRM), and populate fields or terms on the sales contract. Templates serve as the contract boilerplate, and are stored centrally and categorized into libraries for consistency and ease of use. Sales personnel can easily compose a customer contract from the template, confident that the contract terms and conditions are accurate.
- **Insurance Claims:** Agents can generate letters responding to claims submissions, pulling data from multiple sources into the final produced document. Final documents can be locked down from editing or further changes and storage of the document can be forced to a common location, centralizing management of the document and making retrieval efficient.
- **Service Organizations:** Sub-contracted billing companies can use templates to automatically generate third-party billing with consistent company logos and branding. Authorized users can edit templates without involving costly programming staff. Final, composed documents can be stored into OnBase, printed or emailed out to recipients.

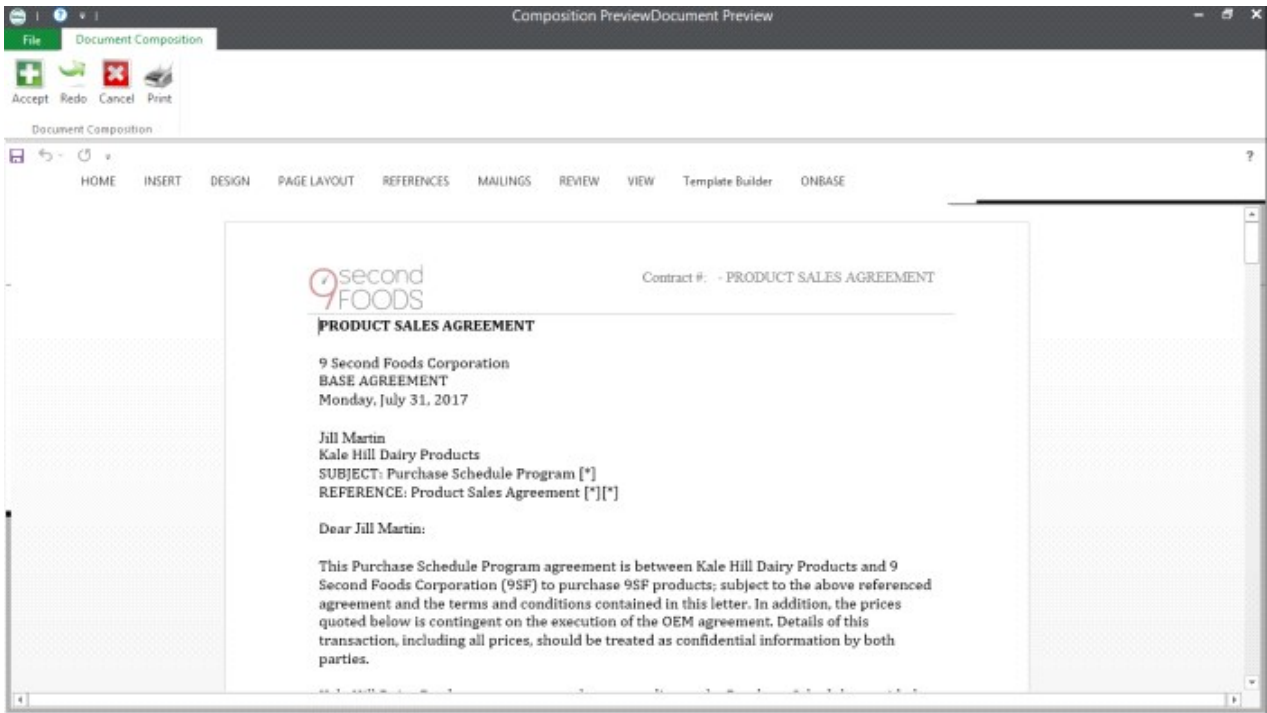
## KEY FEATURES

- Dynamically aggregate information from multiple data sources, including external data sources, user inputs and OnBase values
- Wizard-driven configuration of document templates in Microsoft Word 2010, 2013 or 2016 makes template configuration more intuitive
- Flexible distribution options including e-mail, print, and automatic archiving in OnBase
- Flexible security options on both templates and final documents
- Inherit document keywords from template fields and existing OnBase documents
- Leverage external data in documents using XML, SQL statements or Unity Scripts

## INTERFACE

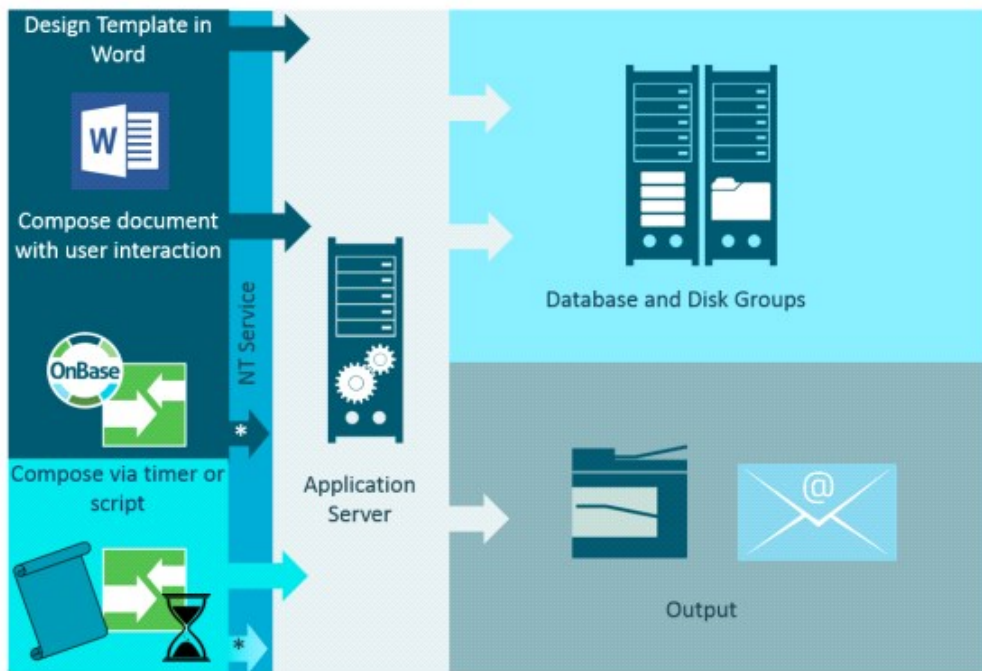


Template Configuration in Microsoft Word



Previewing a composed document in the Unity Client Interface

## ARCHITECTURE



Templates are configured in Microsoft Word, and composed documents are created from a client, via Workflow, or a script. An optional NT Service or the Application Server will be used to create the document. The final document is stored in the OnBase Disk Groups with the indexing data in the database. The document may be printed or emailed, and archived as a .doc, .tiff, or .pdf file.

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