

ONBASE

DOCUMENT PACKAGING

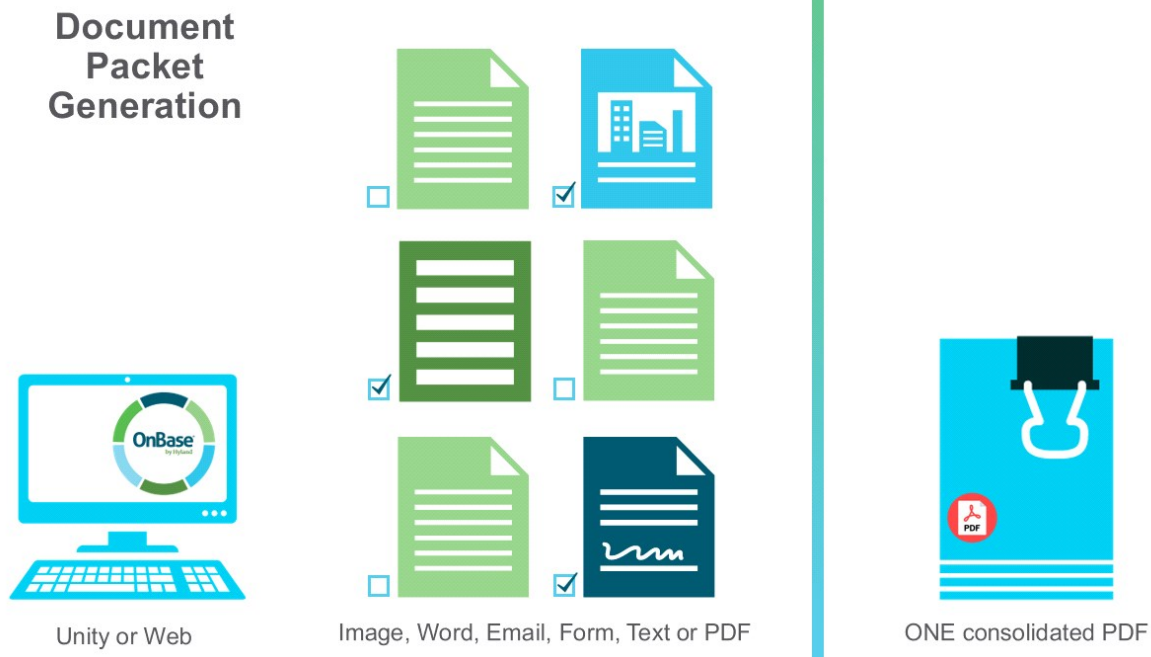
SUMMARY

Document Packaging offers users the ability to generate a single PDF document from multiple source documents, all within OnBase. A predefined package template can include a dynamic header, footer and table of contents. Before the package is finalized, documents and pages can be rearranged, duplicated or removed from the final output, offering runtime flexibility and a high level of customization. The resulting packet is indexed and uploaded into OnBase and can be treated as any other OnBase PDF document—edited, routed and shared using your existing processes.

BENEFITS

- **Automatically gathers documents** and packages them into a single, consolidated PDF
- **Increases efficiency** by automating the document creation process and template management
- **Standardizes document generation** to improve accuracy and support legal and compliance requirements
- **Promotes data integrity** by pulling source documents directly from OnBase, eliminating errors from manual processes
- **Mitigates risks** associated with freeform document production and manual data entry errors
- **Improves customer service** by minimizing errors and decreasing turnaround time for inquiries and document requests

DESIGN



From an OnBase Unity platform product or OnBase Web Client, a user can assemble a document packet with or without a pre-defined template. From a visual interface, they are able to add/remove/reorder pages and documents. Once modifications are complete, they can preview the packet prior to generating the final package into a single, consolidated

PDF document.

APPLICATIONS

- **Financial Services Organizations** are often burdened by the time-consuming and labor-intensive process of packaging and delivering documents to third-parties. For example, they may have to bundle hundreds of documents for a single mortgage loan sale to a correspondent lender. They may also package documents to fulfill customer/member requests and court subpoenas.
- **Insurance Claims** adjusters can generate a claim settlement packet launched directly from the claims processing application. Documents related to the claim such as medical reports or damage assessments are collected into a single PDF for delivery, in addition to centralizing management of the document and providing efficient retrieval and routing options. Other use cases include consolidating and packaging documents related to a specific insurance claim (used in court) or policy (sent to insurer).
- **Higher Education Institutions** must review many documents related to student applications such as letters of recommendation, transcripts, test scores, interviews, etc. Often staff must collect around 20-30 documents per application. The application packet "table of contents" gives the ability to quickly navigate one consolidated PDF, which is a collection of all the documents merged into one file for email and print.
- **Government Entities** need to package related documents as part of the public records request fulfillment process. Within OnBase, users are provided a range of search tools to identify potential documents required to complete requests. Once records are located and redacted, they can be easily bundled in to a single PDF file for electronic delivery to the requester.

KEY FEATURES

- **Combine multiple file types** including images, text, email, MS Office files, E-Forms, Unity Forms and more
- **Modify the packet** prior to generation by rearranging, adding, removing or duplicating documents and pages from the final output
- **Preview a document packet** prior to generation and make modifications prior to publication
- **Create package templates** in OnBase Configuration providing further automation and standardization of the packet generation process
- **Standardize with templates** that predefine document order, as well as include a dynamic header, footer and Table of Contents (with link to jump to a particular document in the set)
- **Automatically archive** the packet into OnBase and inherit document keywords from the source document
- **Edit an existing packet** by rearranging, adding or removing documents and then generate an entirely new packet
- **Use the packet** as any other PDF document in OnBase—edit, route, print, email and share using existing processes
- **Automatic (Workflow) or Ad-hoc (right-click with or without templates) creation of packets** based on business process needs

INTERFACE



Packet Content Selection

File

Generate Packet Preview Packet Cancel Undo Redo Keywords Add Documents

Packet History Modify Add

Employee File Packet

Included Documents

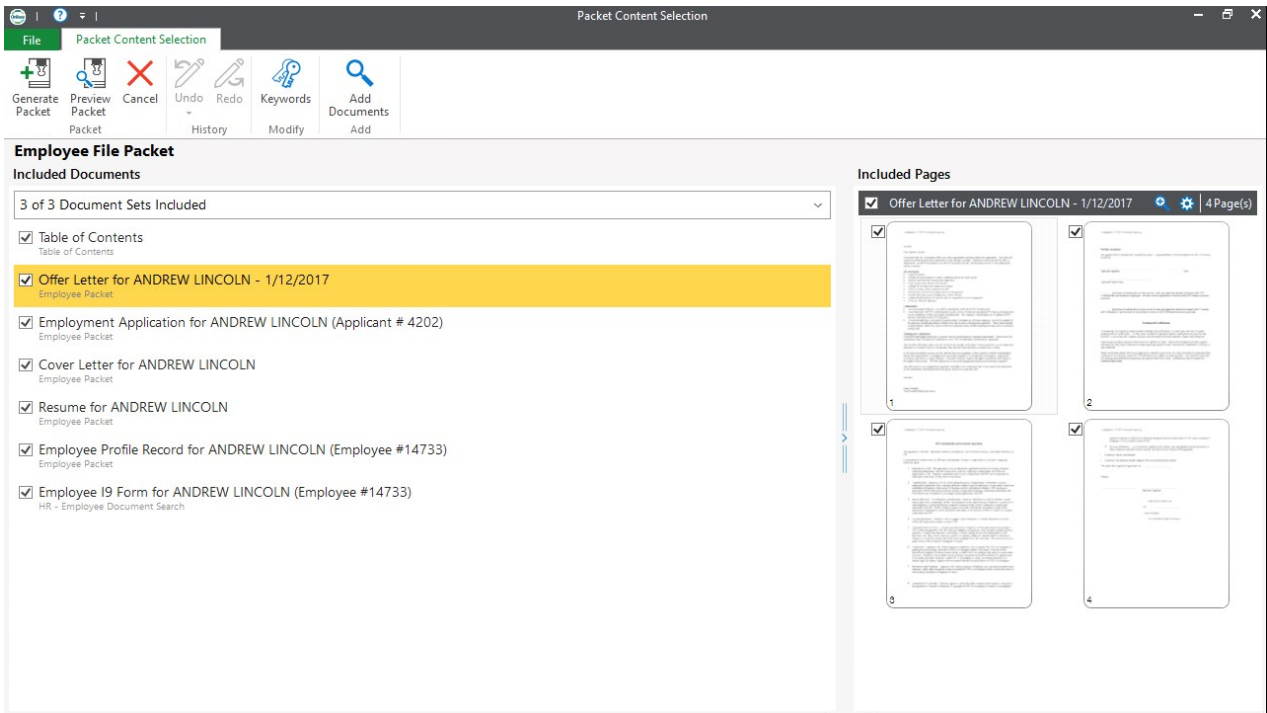
3 of 3 Document Sets Included

- Table of Contents
Table of Contents
- Offer Letter for ANDREW LINCOLN - 1/12/2017
Employee Packet
- Employment Application for ANDREW LINCOLN (Applicant # 4202)
Employee Packet
- Cover Letter for ANDREW LINCOLN
Employee Packet
- Resume for ANDREW LINCOLN
Employee Packet
- Employee Profile Record for ANDREW LINCOLN (Employee #14733)
Employee Packet
- Employee I9 Form for ANDREW LINCOLN (Employee #14733)
HR - Employee Document Search

Included Pages

Offer Letter for ANDREW LINCOLN - 1/12/2017 4 Page(s)

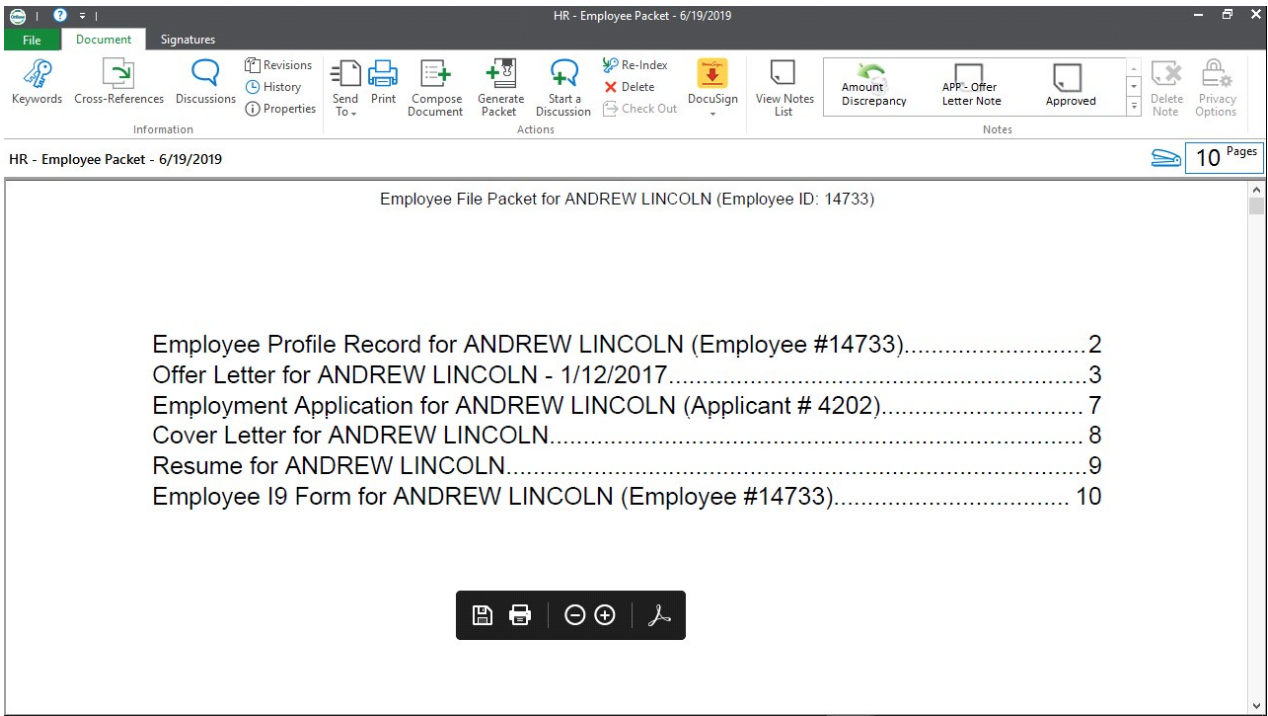
1 2 3 4





Content Selection Interface to Add/Remove/Reorder Pages and Documents

Packet

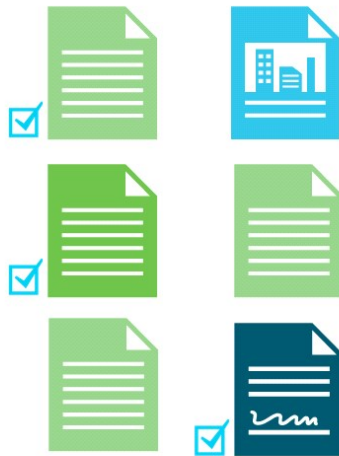


Final Document Package with Table of Contents in PDF File Format

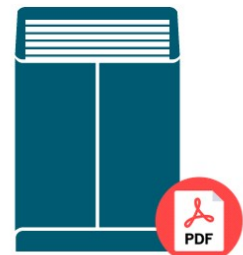
ARCHITECTURE



Unity or Web



Image, Word, Email, Form, Text or PDF



ONE consolidated PDF

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