

EDM Services

Summary

OnBase Electronic Document Management (EDM) Services (Foundation EP1) controls and tracks the modification of documents stored in OnBase through revisions and versions. This ensures the integrity of the document, protecting it against the risk of overlapping changes from multiple editors. Organizations can centralize the management of changing business documents, and provide offline synchronization for remote users, ensuring that all users are always accessing version-accurate copies.

Benefits

- **Manage documents** requiring changes as part of a business process 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
- **Provide offline access** to centrally stored documents for disconnected, remote workforces
- **Promote data integrity**, ensuring document consistency and keyword accuracy

Design



An HR Manager can make changes to an employee handbook, for example, and save revisions of the document, without making each revision available for employees to access. When the document is finalized, the HR Manager can stamp the revision as a version and give Employees access to only that approved version(s). Multiple versions can be stamped on one document. Permission to view and change both revisions and versions can be specified at the user group and individual level.

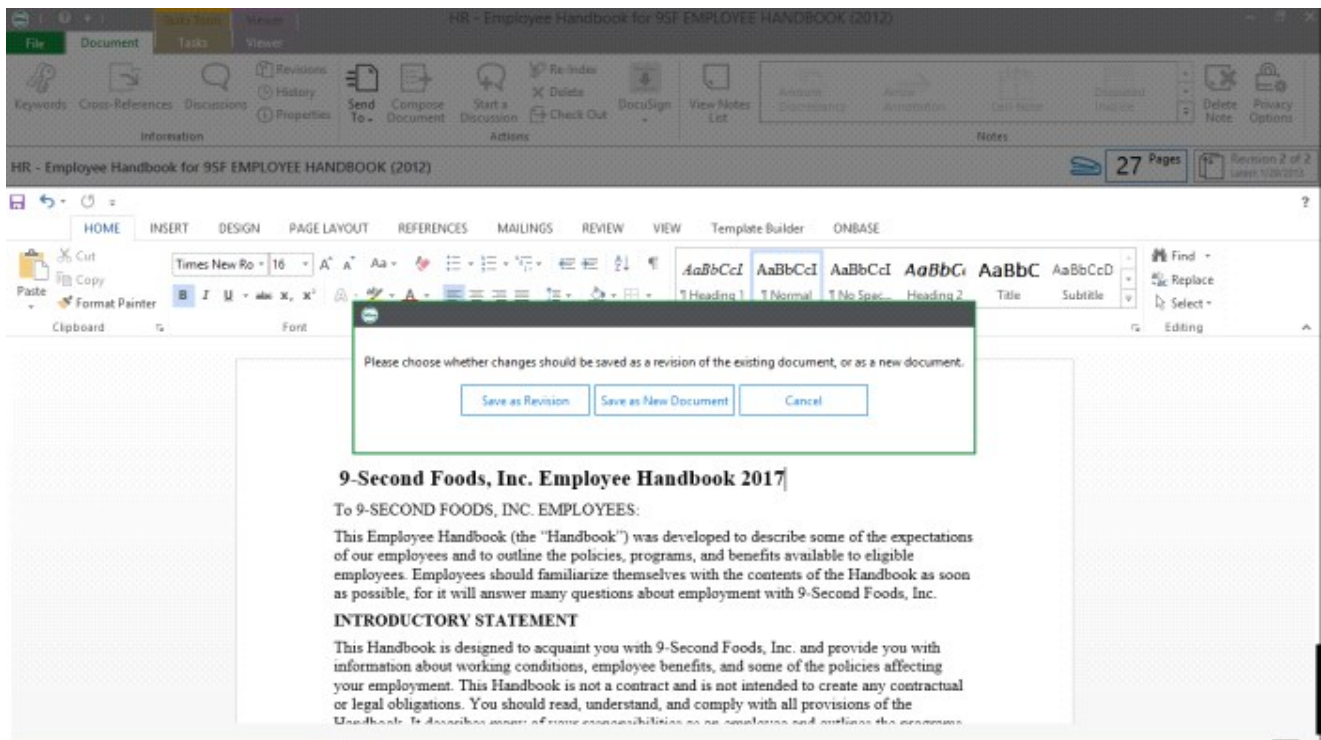
Applications

- **Sales contracts or insurance underwriting documents:** An audit trail of revisions is maintained to establish accountability among users and minimize risk for the organization.
- **Standard back office processes:** Place permanent marks or annotations on image documents, such as tax forms, purchase orders or invoices, as part of a standard business process using Image Markups.
- **Legal and compliance purposes:** Standardize document content and format using Document Templates.

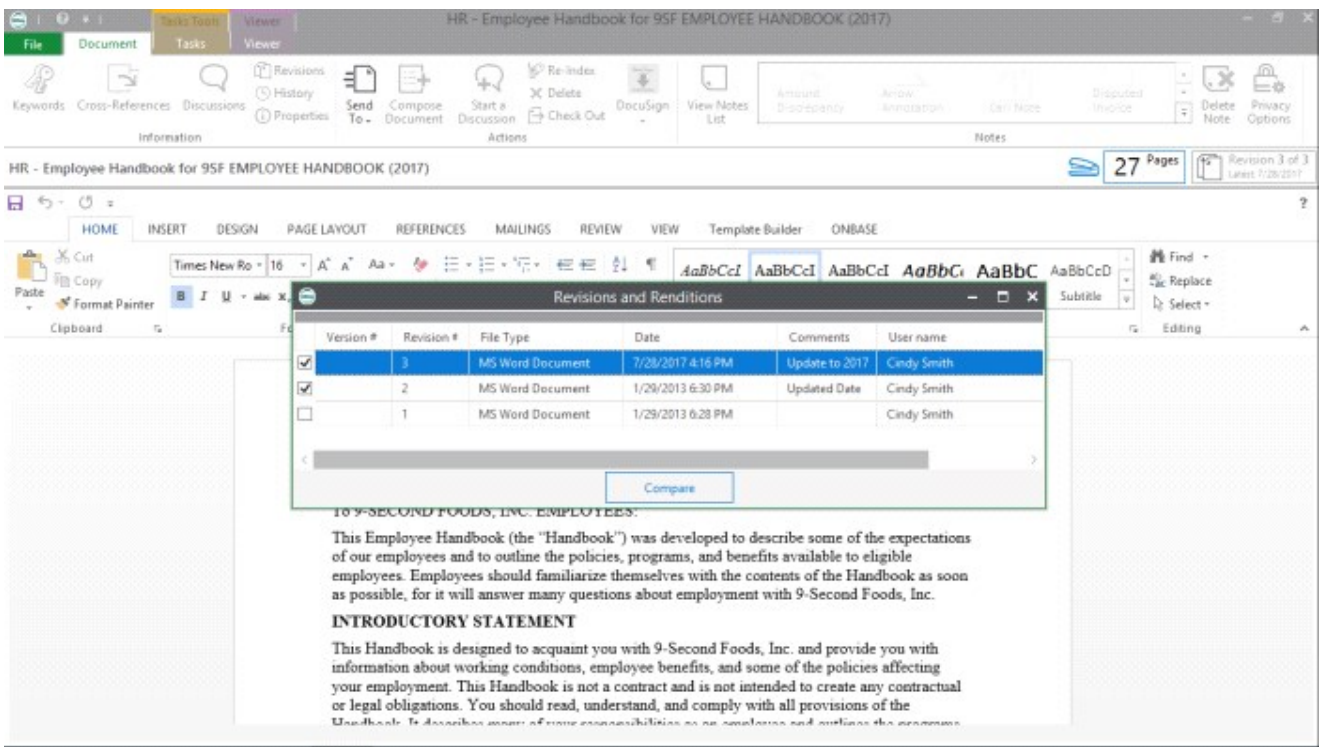
Key Features

- **Revisions and Versions** control draft and public document access rights to modified copies of an original, where same file format is maintained
- **Compare** select two (2) revisions of Microsoft Word documents to identify exact differences
- **Image Markups** permanently burn graphics, annotations and text to any image document to be saved as a revision
- **Document Templates** use a base document to maintain standard formatting and text copy for consistent, accurate document creation
- **Import multiple files** into OnBase at once, using simple drag and drop functionality
- **Document Checkout** provides ability to persistently lock a document for *online* editing, including Word, PDF files and more
- **EDM Briefcase** allows users to check documents in and out of OnBase into a virtual briefcase for *offline*, disconnected access

Interface



Save as Revision or Save as New Document



View document Revisions and Renditions with ability to 'Compare' changes

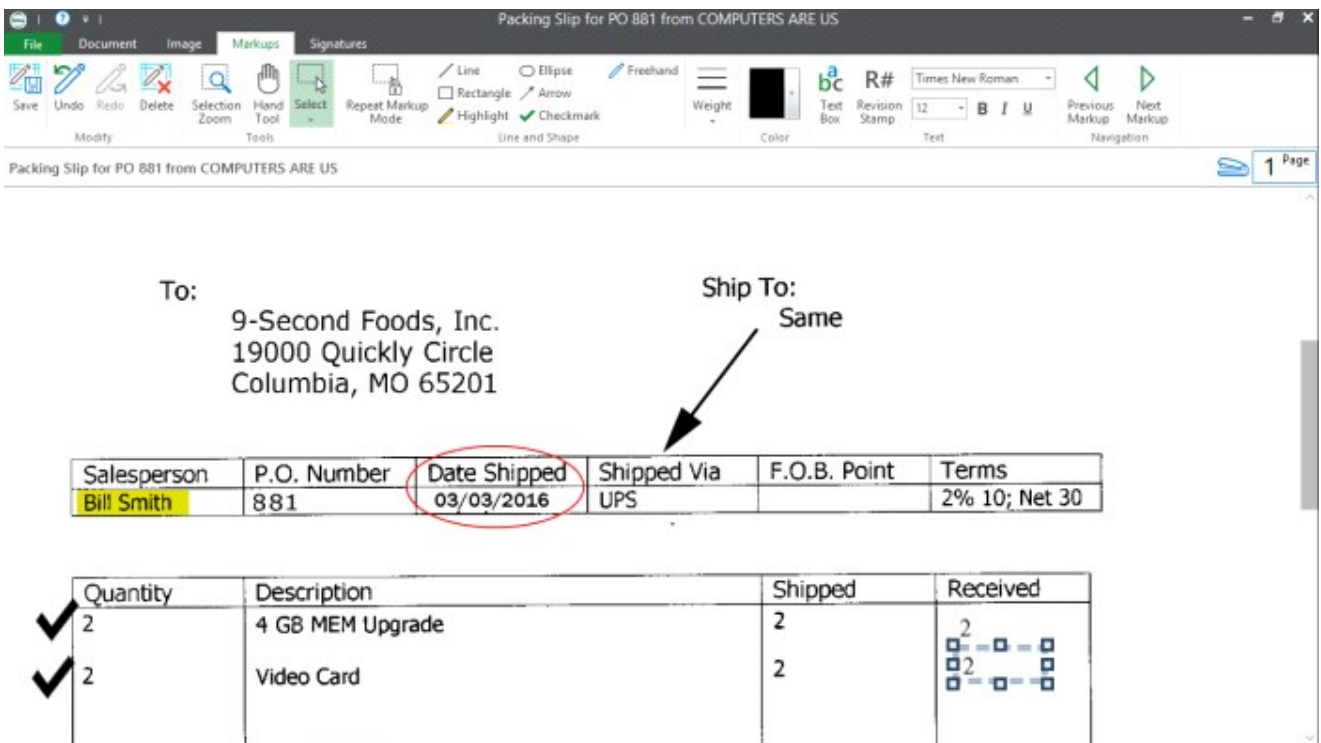
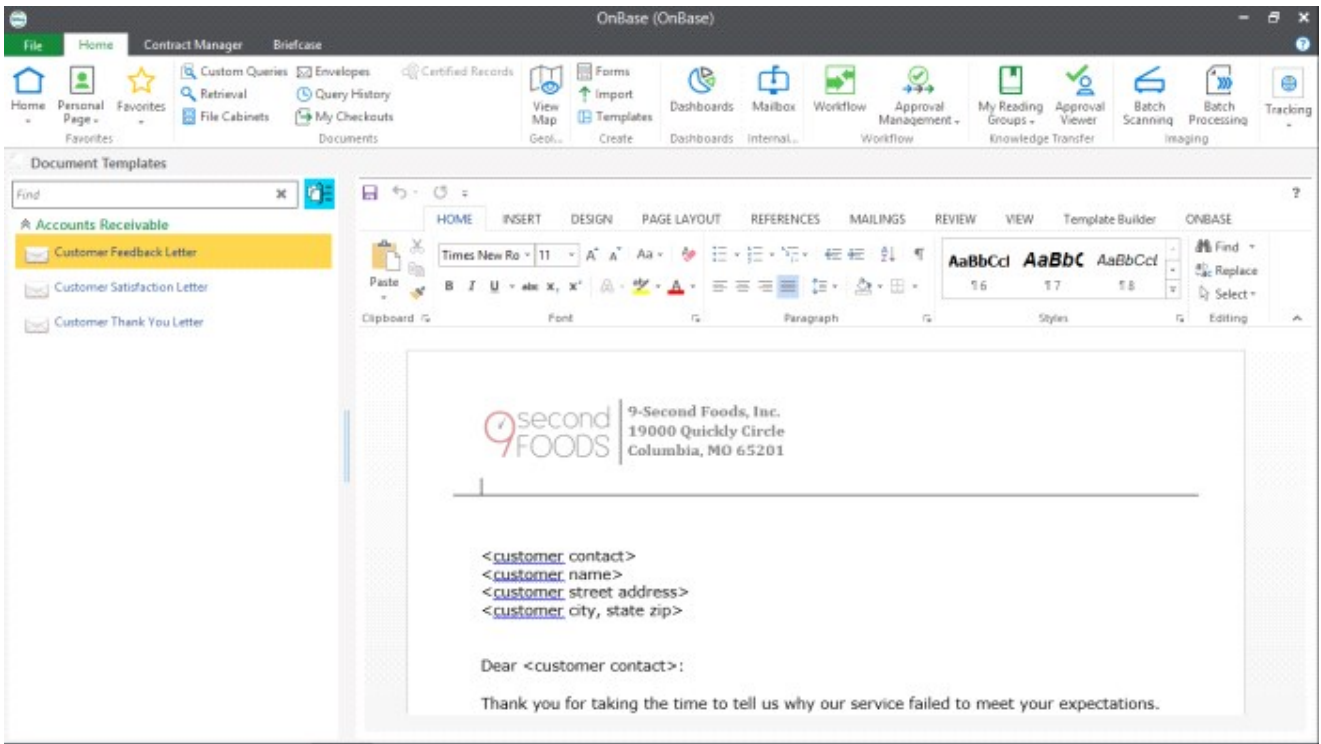
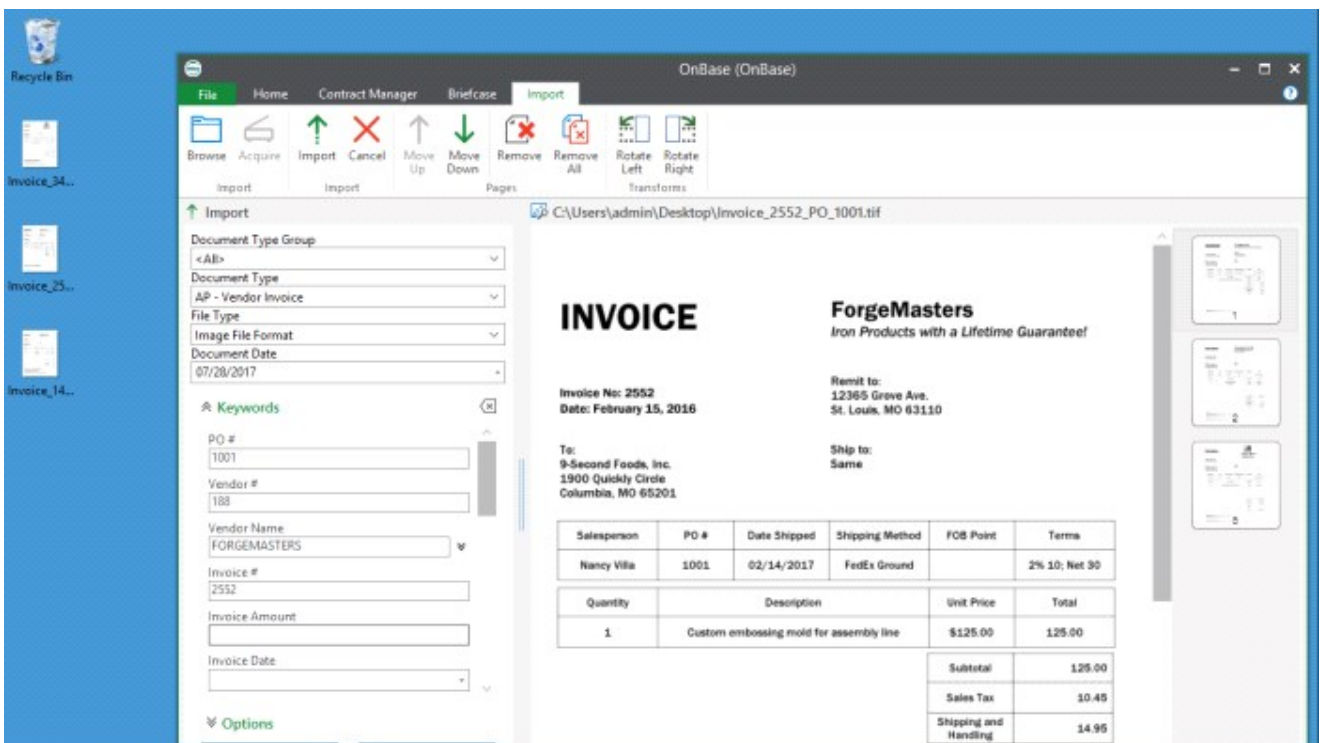


Image Markups (Highlight, Ellipse, Arrow, Checkmark, Text Box shown)



Create a new Word file from a Document Template



Drag-and-drop multiple files for Import into OnBase

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