# ONBASE

## EXTERNAL ACCESS CLIENT

## SUMMARY

The External Access Client allows organizations to create OnBase web portals to provide secure, controlled access to outside users such as customers or B2B partners. Leveraging intuitive and interactive dashboard interfaces, these users gain self-service access to OnBase content and processes, including form creation and document uploads. Out-of-the box features allow users to request their own accounts and super-users can manage accounts for user groups. For instance, a primary contact at a business partner can manage user accounts for just their own company. Easily and securely extend OnBase to those outside your department or organization.

## BENEFITS

- **Reduce customer service inquiries** and associated costs by providing self-service access.
- **Accelerate the speed of transactions processing** by providing instant access to the information needed by all parties.
- **Improve customer and partner relationships** making it easier to collaborate or resolve business issues.
- **Securely share OnBase content** eliminating the need for redundant copies to be distributed.
- **Eliminate the use of disparate tools**, such as phone calls and emails, to communicate with customers and partners.
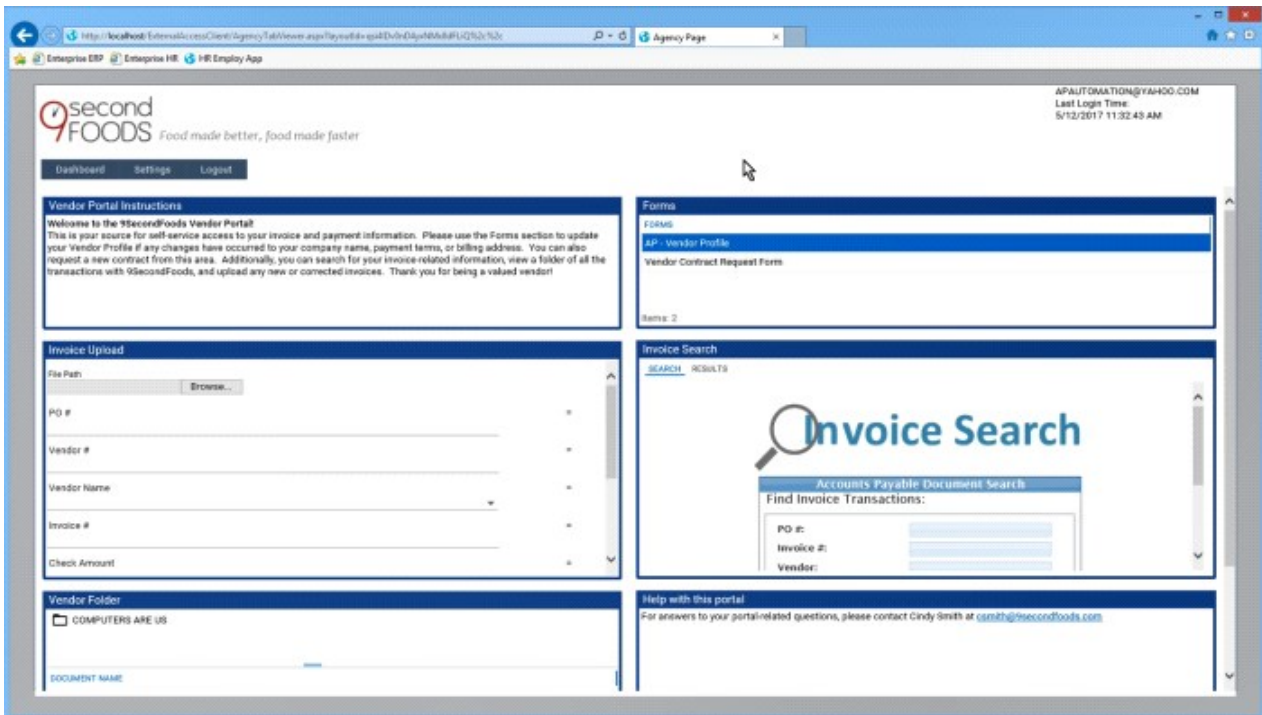
## DESIGN



Leveraging the Web Server StatusView interface, the External Access Client provides three portal types that—coupled with OnBase security—allow you to establish appropriate levels of access to external users:

1. **Read-Only:** Custom Queries, Envelopes, Folders and download content.
2. **Contribute:** all "Read-Only" features plus Forms, File Upload and Document Knowledge Transfer & Compliance.
3. **Full Access:** all "Contribute" features plus Workflow, WorkView and Business Activity Monitoring.
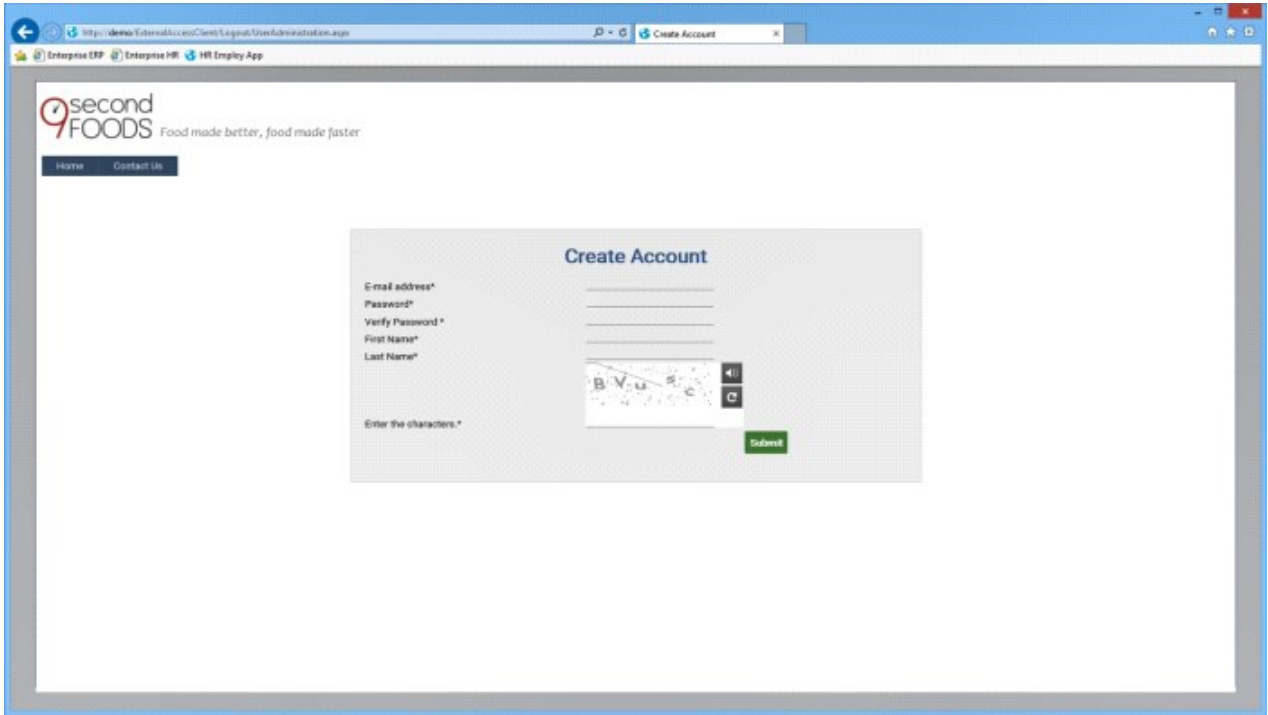
**Hyland®**

## KEY FEATURES

- **Built on Web Server StatusView** making it easy to configure and deploy portal dashboards.
- **Easily extends OnBase products and features** including Custom Queries, Envelopes, Folders, Forms, Upload, Document Knowledge Transfer & Compliance (DKTC), Workflow, Business Activity Monitoring and WorkView.
- **Inherits the features of the OnBase HTML Web Client** including document viewer features and supported browsers.
- **Leverages Workflow Unity Life Cycles** to process user account requests.
- **Super Users** can manage the administration of external users for their organization.
- **Built-In CAPTCHA feature** to protect against programmatic attempts at portal access.

## INTERFACE



*Portal view of StatusView layout.*

*External Access Client create account form with CAPTCHA.*

Learn more at **Community.Hyland.com**

Hyland®