

capture · store · search · retrieve · collaborate · manage · distribute · comply



engage. empower. **evolve.**[™]

OnBase[®]

a Hyland Software solution



“Conservatively, I estimate that the total annual savings from OnBase will be somewhere in the million-dollar range.”

- David Sundstrom, Orange County, CA Auditor-Controller

engage. empower. evolve.™

OnBase® is enterprise content management software that combines integrated document management, business process management and records management in a single, web-enabled application.

OnBase enables organizations to import, route, manage and archive the content that drives all of their processes. Migrating documents, tasks and rudimentary operations away from the user and into the OnBase system enables organizations to extract maximum value from the information around them and better utilize human capital for higher impact, strategic tasks.

As a result, organizations achieve increased efficiencies, improved productivity, assured compliance and the refocusing of resources that culminate in more effective, efficient operations.

“OnBase demonstrated an easy-to-use overall design and an intuitive workflow configuration. The solution also provided us with the ability to customize the application and integrate it with other existing applications to meet our specific needs.”

- Chris Dozier, Verizon Wireless

RELEVANT SOLUTIONS, REAL RESULTS

The OnBase® enterprise content management solution manages virtually every type of content – images, faxes, host generated reports, application files, HTML forms, e-mails, video clips, etc. – as well as every stage of the lifecycle – creation/input, storage, retrieval, revision and distribution. As a result, the power of information is returned to the user, allowing organizations to achieve better managed operations, reduced costs, increased efficiencies and peak effectiveness.

By dynamically organizing and controlling the delivery of documents and interactively managing the business processes in which these documents are used, OnBase solutions allow organizations of all sizes to streamline

their work processes and share information among their employees, business partners and customers.

OnBase solutions are designed to enable new users, with only a few minutes of instruction, to sit down at their workstations and start retrieving and working with the documents they need to do their jobs. Far from dictating a one-size-fits-all approach, OnBase solutions are capable of providing multiple, customized interfaces that align seamlessly with the ways specific departments, and even individuals within those departments, work.

"Evolve into highly-competitive, connected organizations."

A chief financial officer, for example, requires access to hundreds of different kinds of documents – financial statements, reports, invoices, contracts, etc. The OnBase interface enables the quick specification of the type of document needed, narrows the search by keyword(s) or date and instantly retrieves that specific document. A human resources manager, by contrast, often needs to review multiple documents at the same time. OnBase has the ability to pull an entire employee file simply by entering an employee’s social security number. A sales manager has still a different requirement: a need to review



a specific sales report at the same time every day when he arrives in the morning. Instead of making him execute the same search every day, OnBase can be configured to automatically e-mail the latest report to him each morning.

In some cases, the most intuitive way of retrieving documents may not be through the native interface of the OnBase application itself. Users of core accounting systems or enterprise resource planning (ERP) systems are able to double-click on a field in those applications to retrieve relevant documents from the OnBase database - for example, clicking on an invoice number to retrieve a copy of that invoice. Similarly, Microsoft® Outlook™ users can access their documents through Outlook, and portal users are able to access documents through their individualized portal interfaces.

Upon retrieving documents, OnBase users can print, fax or e-mail them with just a click of the mouse. They also can attach electronic "sticky notes" to documents, highlight areas of documents and modify documents to save them as new revisions. And beyond managing the documents themselves, OnBase helps manage the business processes in which those documents are used. OnBase Workflow accelerates and often completely automates the routine tasks involved in executing a business process as it electronically routes documents among appropriate users.

"OnBase is a terrific product with so many capabilities. The opportunities to incorporate, improve and grow with OnBase are endless."

- Doug Qualset, Time Warner Cable

ADDRESSING ORGANIZATIONAL CHALLENGES

OnBase® solutions provide value to customers by addressing four basic organizational challenges: cost, collaboration, compliance and customer service. First, and most importantly, OnBase reduces costs. OnBase enables almost any department to accomplish more work with less manpower. And further, it allows those same departments to eliminate many of their file cabinets, printers, copiers, fax machines and offsite storage facilities.

Second, OnBase promotes greater collaboration. As organizational models shift from geographic to business-unit structures, and as workforces become increasingly dispersed, employees can remain connected and productive by easily sharing the documents and content they create. OnBase eliminates the need to recreate work and helps ensure that decisions are based on the most accurate, relevant information possible.

"OnBase addresses cost, collaboration, compliance and customer service."

Third, OnBase helps organizations effectively address compliance. OnBase ensures that a) documents can be viewed only by those with appropriate permission to do so; b) processes are followed exactly as they are designed; and c) records are managed in conformance with applicable internal and external regulations. OnBase currently is

helping manufacturers maintain ISO compliance, hospitals adhere to HIPAA regulations, lenders demonstrate compliance with the Graham Leach

Bliley Act and public companies abide by Sarbanes-Oxley guidelines.

Finally, OnBase supports a higher level of customer service. OnBase enables organizations to respond in real-time to requests – perhaps for a copy of a canceled check, or a misplaced utility bill or a blood test report – and thus retain customers by increasing levels of customer service considerably. Representatives are empowered to resolve issues on the first call; billing errors become drastically reduced; and discrepancies are minimized.





"We have a fabulous system. It came in on time and under budget."

- Barbara Hafer, Commonwealth of Pennsylvania

THE ONBASE DIFFERENCE

Most content management systems take a toolkit approach, providing a set of "building blocks" that include a common front end for interfacing with several separate software packages. OnBase®, by contrast, is a single software application that utilizes a single relational database, a single configuration utility and a single customizable user interface for all processing and retrieval.

This unparalleled level of integration enables OnBase to provide an exhaustive amount of out-of-the-box functionality to support the most sophisticated content management and workflow solutions. In designing solutions to meet their own unique requirements, customers select from more than 50 separately licensed OnBase modules that provide specialized input, management and output functionality. As a result, OnBase customers are encouraged to invest

in the solution they need today, and then incrementally, cost-effectively expand and enhance the system as their needs grow.

"OnBase has been lauded for its architecture, out-of-the-box functionality, deployment time, cost-of-ownership, scalability, ease-of-use and support."

the flexibility of accessing the system through several types of thin (browser-based) clients, a traditional thick client, Windows™ Explorer or even other enterprise applications.

OnBase, including the award-winning Workflow and Application Enabler products, also is completely point-and-click configurable, enabling the rapid deployment of sophisticated solutions

OnBase is built upon a highly evolved, web-enabled, client/server architecture that leverages the openness and scalability of databases like Oracle™ and Microsoft® SQL Server™ to deliver high performance solutions for the department, division or enterprise.

OnBase offers users



without the need for expensive, time-consuming programming.

OnBase Workflow uses a configurable set of rules and actions to consistently route content through a user-defined business process. The point-and-click configuration of OnBase Workflow enables organizations to quickly deploy robust workflow solutions, streamline business processes and create the opportunity for continuous improvement.

OnBase Application Enabler provides a transparent mechanism for rapidly integrating content-based functionality with text, Windows and web-based applications, without the need for custom coding. The simplicity of the concept behind Application Enabler ensures organizations are equipped with a powerful, intuitive tool that provides

agile content management functionality to core line-of-business applications. Retrieval and indexing of real-time content without the need for additional desktop applications ensures better distribution of administrator resources, minimal user guidance and substantial gains in productivity across the user community.

OnBase integrates with hundreds of third-party applications, including attachmate™, ClientAccess™, ArcView® GIS™, JD Edwards™, Lawson™, MAS 90™, Microsoft® CRM™, Oracle™, PeopleSoft™, QAD™, SAP™ and Siebel™.



HIGH VOLUME CAPTURE

Content driven enterprises will continue to look for the quickest and most reliable practice for creating or transitioning information into their businesses. Today, content rarely arrives from a single source. The challenge is to not only manage the way in which content is received, but to understand how to best leverage its intrinsic value.

OnBase® provides sophisticated mechanisms for the production, capture, index and storage of literally any type of document, whether originating on paper or in electronic format. For paper documents, faxes and forms, OnBase provides several capture methods to optimize speed and accuracy requiring minimal user intervention. OnBase **Document Imaging** interfaces with Kofax-, ISIS- and TWAIN-compliant scanners to convert paper documents into a variety of standard image formats, while providing several options for distributed capture and indexing. OnBase also stores files generated by third-party imaging and forms processing applications through an open and configurable **Document Import Processor** (for high-volume, batch input)

and OnBase **Archival API** (for real-time input). Any image imported into OnBase can be converted into a searchable text rendition with OnBase **OCR** (optical character recognition) and then indexed with OnBase **Verity™ Full-Text** indexing.

Once imported into OnBase, all document images can be processed via the OnBase OCR (optical character recognition) module in order to create searchable, full text, index-ready documents. Users are able to view both the original image and its text rendition via a simple right click.

OnBase also handles the increasing volume of documents that are entering the organization in electronic format such as e-mails, PDFs and HTML forms. OnBase **Subscription Server** automatically indexes and stores e-mails and corresponding attachments into the OnBase repository, based upon such characteristics such as sender, recipient, subject, date, message ID and return path. OnBase **E-Forms** provides a standard means of initiating requests, notifications and other routine processes by allowing users to complete and submit

online HTML forms that become immediately available for retrieval and routing. E-Forms also can play a central role in workflows, allowing users to create electronic documents to initiate, participate in or complete business processes.

OnBase is equally adept at processing internally produced documents. OnBase **COLD/ERM** captures and preserves text-based records such as invoices, purchase orders, statements and reports by processing print streams generated by transactional mainframe or client/server applications. OnBase COLD/ERM offers optional multi-threaded processing for high-performance, add-on modules for natively handling PCL, AFP and DJDE data streams and built-in support for data mining. OnBase provides two methods for defining and configuring COLD/ERM processes. The first provides a traditional ASCII text-based interface allowing the user to define document separation and indexing data, while the second method provides similar functionality via a graphical interface with a facility to “rubber-band” key areas using a simple drag-and-click system.

INPUT MODULES

COLD/ERM | Automatically identifies, compresses, indexes and stores reports and statements that are output from computer systems as printer, COM or text files.

Data Input Filters | Works in conjunction with OnBase COLD to process and store PCL, AFP or DJDE data streams, enabling stored documents to retain their original formatting.

Document Imaging | Scans, indexes and stores documents as digital images. Advanced features include distributed capture and indexing, automatic indexing, image enhancement, bar code recognition and blank page separation.

Document Import Processor | Processes batches of third-party generated documents and indices into the OnBase system. Support for scheduling and polling allows for hands-off operation.

E-Forms | Enables users to complete and submit online HTML forms that are automatically captured, indexed and stored as documents in the OnBase system.

Front Office Scanning | Provides a web-based scanning solution for organizations that have remote offices without 100-percent available, high-speed Internet or WAN connections.

Mobile Forms | Enables users to complete and submit business-critical forms electronically, via laptop or portable device, while disconnected from the corporate network.

OCR (Optical Character Recognition) | Recognizes and translates printed alphanumeric characters on a scanned document, converting the image into text to facilitate text searching and/or full-text indexing.

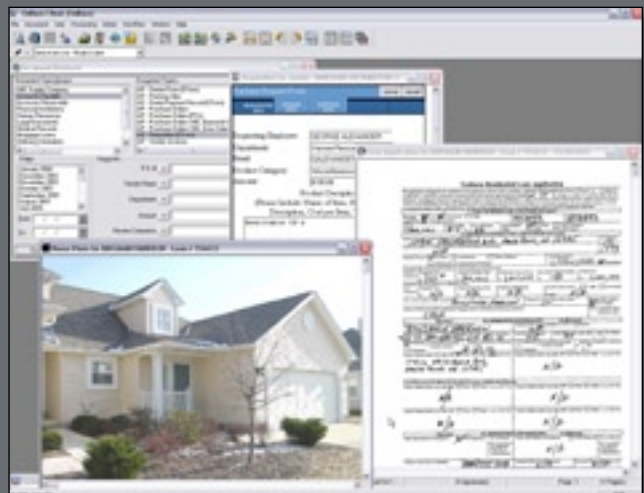
Outlook™ Integration | Allows Microsoft® Outlook™ users to store e-mails and attachments in OnBase, as well as retrieve documents from the repository, through the standard Outlook client interface.

Subscription Server | Automatically captures and stores e-mail messages and attachments directly from MAPI compliant e-mail systems.

Virtual Print Driver | Captures the print stream from any printable application (word processors, drawing applications, web-pages, etc.) and stores a permanent copy in the OnBase system for future retrievals.

XML Tagged Import Processor | Brings XML document data streams into OnBase. Once the XML documents are in OnBase, XML style sheets are applied for printing and viewing. OnBase provides support for XML Documents and their style sheets, resulting in a user's ability to view, print, e-mail, fax, cross-reference, create revisions and attach notes to XML documents.

For complete module listings and details, visit www.onbase.com.



IMMEDIATE ACCESS

Once information has been captured, OnBase® structures the organization of documents through the use of document types and document type groups. These conceptual repositories enable organizations to breakdown content into easily definable, truly manageable groups.

And to ensure ease-of-use, OnBase places chief importance on the user experience, which it delivers by means of the OnBase **Client**. All user activity is performed quickly, consistently and securely through a single thin or thick client interface.

The OnBase Client offers several methods of retrieval including document type/keyword searching, text searching, full-text searching and foldering. The custom query feature allows the creation of custom templates for specific, frequently conducted searches. OnBase's cross-referencing feature enables users to double-click on an open document and automatically retrieve any related documents regardless of data type. With the OnBase **Application Enabler** module, users even can initiate a document

search by double-clicking on a field within a third-party line of business application be it Windows-, web- or text-based*.

OnBase allows users to decide how to display the search results list and what descriptive information to include. Once a document has been retrieved and opened, the OnBase Client provides an array of options for viewing (forms overlay, thumbnails, zoom), annotating (mark-up, redaction, notes, electronic signatures), revising and distributing (e-mail, fax, print) the document.

Much more than a repository for archived documents, OnBase improves the way organizations perform critical business tasks. One way is by sharing internally generated content among knowledge workers. To this end, OnBase **EDM Services** provides document management and library services (long-term/persistent checkout, check-in) for application documents such as word processed documents and spreadsheets.

Another way OnBase improves an organization's operations is by standardizing and accelerating processes in which work is accomplished. OnBase **Workflow** is an extremely powerful, versatile module that routes documents and work according to pre-defined rules (system work) or ad hoc (user work) decisions. A completely integrated component of the OnBase system, OnBase Workflow leverages the configuration parameters (user privileges, document types, keywords, etc.) established for the rest of the enterprise content management system.

As with all of OnBase, OnBase Workflow is entirely point-and-click configurable, giving non-programmers an unprecedented ability to design and deploy sophisticated workflow solutions. Additionally, OnBase Workflow can easily integrate with, and provide the backbone to, e-commerce solutions as well as be tied to organizations' legacy, ERP and CRM systems utilizing VB scripting and robust API calls.

**Hyland Software qualifies all Application Enabler integrations to ensure customer satisfaction.*

MANAGEMENT & INTEGRATION MODULES

Application Enabler | “Image enables” third party applications, enabling users to double-click on specified fields and retrieve related documents from within the OnBase system.

Data Mining Web Interface | Allows business professionals to explore, consolidate, format and aggregate detailed business transactions by extracting data from COLD/ERM information stored within the OnBase system to Datawatch|ES™. This interface allows information-rich text reports processed and stored within the OnBase system to be analyzed to uncover patterns and relationships contained within an organization’s activity and transaction history.

EDM Services | Stores and manages application files such as word processed documents, spreadsheets and presentations. Features include ad hoc document storage, revision control and check-in/check-out.

Electronic Signatures | Attaches password protected electronic signatures to documents with a date/time stamp to prevent fraudulent signing and document tampering.

Host Enabler | “Image enables” host sessions, including 5250, 3270, ANSI and VT terminal types, by running a terminal window inside the OnBase Client.

Lawson™ AP Integration | Allows Lawson™ users to store all types of accounts payable documents and their keywords in OnBase and have those documents instantly available from any Lawson AP screen.

PeopleSoft® Dual Window Indexer | Indexes OnBase documents in a workflow queue over the web. The interface is a special, split-screen browser that hosts PeopleSoft® 8.0 in one pane and displays OnBase documents that are in a Workflow queue designated for indexing.

Plumtree® Portal Extensions | Enable Plumtree® portal users to connect to stored OnBase documents and real-time, workflow processes across Internet or intranet.

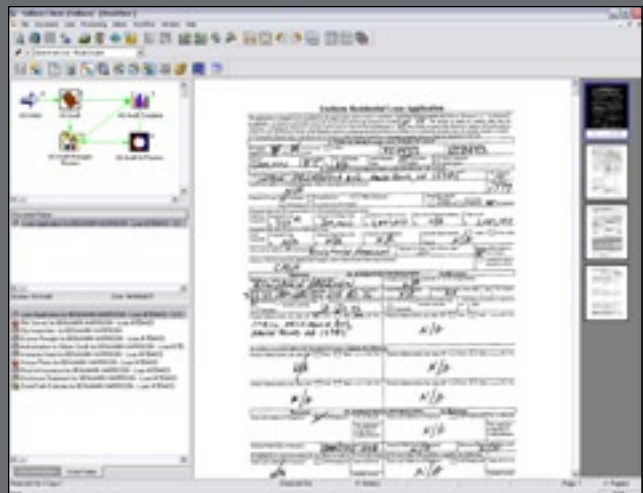
RightFax™ Integration | Allows corporations to more effectively manage both in-bound and out-bound fax transmissions and creating the opportunity for all fax documents to be captured by RightFax™ and immediately archived into OnBase.

Verity™ Full Text | Marries the market leading search technology of Verity™ with the scalability and ease-of-use of OnBase and delivers a single, unified interface for retrieving information.

Workflow | Automatically routes documents and work in accordance with defined business processes. Features include graphical configuration, alternate routing logic, automatic criteria calculation, rendezvous, simultaneous notification, load balancing, reporting, ad hoc routing and VB exits.

WorkView | OnBase WorkView is a complete, easily tailored, point-and-click application that enables organizations to create and track a wide variety of business interactions. With WorkView, organizations can attach OnBase documents to any interaction record.

For complete module listings and details, visit www.onbase.com.



DIGITAL DISTRIBUTION

OnBase® offers an array of modules to address nearly every conceivable scenario of distributing stored documents, including via fax, e-mail, printing, CD/DVD or web publishing.

Several of these modules specifically are designed to be used in combination to dramatically improve the way in which a commercial organization or financial institution distributes bills and statements. OnBase **Image Statements** creates “compound statements” by taking primary documents (invoices) and matching them to supporting secondary documents (signed receipts) for rendering. Features include statement formatting options for both primary and secondary document output (including fonts, headings, auto naming conventions and range selection), the ability to present multiple secondary documents on a single page, (tags, checks, packing slips and deposit slips) and the ability to switch documentation formats “on-the-fly” on a per-customer basis.

OnBase **Document Distribution** extends the capabilities of OnBase Image Statements by managing the process of electronic delivery. With OnBase Document Distribution, documents are delivered directly to the intended recipients, eliminating the need for paper, printing and postage costs. OnBase can distribute the statement in TIFF, RTF or PDF (including encrypted PDF) format for e-mail and web publishing. Document Distribution also provides the option of attaching a customized cover letter, e-mail message or promotional document to a statement.

Managing the life cycle and the ultimate destruction of business generated content is handled by OnBase **Document Retention**. The Document Retention module migrates or destroys content according to set of easily definable business rules. Structuring retention, migration and destruction programs ensure organizations can operate effectively and adhere to present and future compliance regulations.

DISTRIBUTION & OUTPUT MODULES

CD-DVD Authoring | Interfaces with a supported CD or DVD writer to create backup copies of documents. Automated Authoring interfaces with a Rimage™ CD publishing system to automate the backup process.

Document Distribution | Automatically delivers electronic documents to recipients via fax, e-mail, CD or web presentment.

Document Retention | Manages the retention and disposition of stored documents according to pre-defined business rules, typically involving the passage of time or the occurrence of an event.

Exception Reports | Recognizes relationships between a base document type and one or more secondary document types and generates reports on missing, matching or aged items.

Export | Copies OnBase documents and their indices onto transferable media, enabling the data to be imported into another OnBase system.

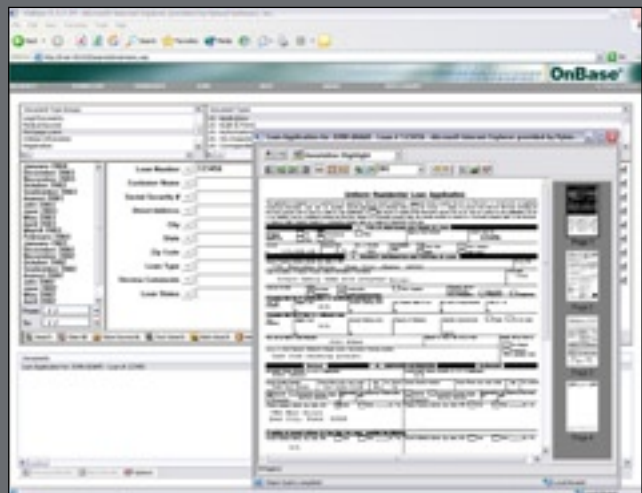
Image Statements | Creates compound statements by matching primary documents, such as invoices, to supporting documents, such as signed receipts, for rendering and printing.

Print Distribution | Schedules printing and distribution for remote locations according to combinations of document keyword attributes.

Publishing | Creates self-contained, distributable document repositories by copying documents, indices, OnBase retrieval executables and a runtime database onto CD, DVD or other targeted media.

Statement Designer | Creates graphical and data-dynamic statements from process data streams for print, fax or electronic distribution.

For complete module listings and details, visit www.onbase.com.





ARCHITECTURE

The OnBase® architecture is built around the Microsoft® Windows™ Operating System, creating cost effective models for deploying and developing scalable ECM infrastructure.

FILE STORAGE

- Tiered storage model ensuring fault tolerance and redundancy
- FTP, NAS, SAN support
- Optical support (CD, DVD, MO)
- Remote caching via WAN

SECURITY

- NT™ User/Group style security model
- Windows / Novel™ Group mapping
- LDAP Support
- 128 bit encryption

API

OnBase API and XML interfaces are accessible through:

- Microsoft COM/DCOM/.NET technologies
- ASP and ASP.NET websites
- C#, VB, C++, Java and other applications
- Cross-platform, distributed Web Services via SOAP/XML standards
- Microsoft .NET Remoting wrappers
- Compatible portal frameworks

The OnBase Software Development Kit (SDK) is available with interface details, sample scripts and technical documentation.

WEB ACCESS

- N-tier application
- ActiveX® and HTML support
- Compatible with SSL and VPN secure connections
- Windows domain directory servers support
- Access to existing OnBase document repositories

- Backward compatibility with existing OnBase document repositories
- Standard browsers function as secure OnBase web clients
- Internet Explorer (ActiveX, HTML)
- Netscape, Opera, etc (HTML only)

WEB SERVER DEPLOYMENT

- Intranets
- Secure supply chain extranets
- Customer-facing web portals
- Can operate as machine-to-machine, back-end application server permits the integration of legacy applications into real-time, XML-based Web business processes, such as financial service straight through processing, exception handling applications and orchestration of cross-platform Web Services.
- Requires Microsoft IIS 4.0/5.0 on Microsoft Windows NT/2000.



MARKETS SERVED

Hyland Software has affiliations with a global network of more than 200 value-added resellers, integrators and private-label partners. The unique architecture of the software and diversity of expertise among the company's channel partners have allowed OnBase® to be implemented at a remarkably wide range of commercial and public sector organizations.

BUSINESS SOLUTIONS

- Accounts Payable
- Accounts Receivable
- Compliance Support / Reporting
- Credentialing
- Customer Service
- Disaster Recovery
- E-commerce
- Electronic Statement / Bill Presentment
- Expense Reporting
- HR Compliance
- ISO 9001 Support
- Mail Handling / E-mail Archival
- Sales Management

VERTICAL SOLUTIONS

- Education
 - Registrar
 - Student Records
 - Physical Plant
 - Admissions
 - Development Fund
- Financial Services
 - Community Banking
 - Consumer Accounts
 - Statements
 - Lending
 - Origination
 - Underwriting
 - Closing
 - Servicing
 - Shipping and Delivery
 - Diversified Financial
 - Lockbox / Payment Processing
 - Controlled Disbursements
 - Trust Management
 - Separately Managed Accounts

- Government
 - Federal / International
 - Armed Forces
 - Agencies
 - State and Local
 - Tax / Controller / Audit
 - Clerk of Courts
 - Law Enforcement
 - Human / Social Services
 - Child Support Enforcement
 - Vital Statistics
- Healthcare
 - Registration
 - Patient Records
 - Patient Accounting
 - Coding
 - Pathology
 - Back Office
- Housing Authorities
 - Application Processing
 - Legal Documentation for Public Housing
 - Tenant Services
 - Program Integrity
- Insurance
 - Property and Casualty
 - Life and Health
 - Reinsurance
- Manufacturing and Transportation
 - Shipping and Warehousing
 - Procurement
 - Payables and Receivables
 - Inventory Management
 - Order Fulfillment
- Utilities
 - Accounts Receivable
 - Contracts
 - Customer Service
 - Remittance

ABOUT HYLAND SOFTWARE

Hyland Software, established in 1991, is the leading provider of rapidly deployable enterprise content management solutions.

As a customer-driven organization committed to providing world-class service and support, the company is dedicated to developing enterprise content management solutions that are deployable at both the departmental and organizational levels. As a result, OnBase is used by thousands of commercial organizations and government agencies to streamline operations, reduce costs and share information with employees, partners and customers.

Headquartered in Cleveland, Ohio, Hyland has offices located throughout the United States, Latin America, Europe and Japan.



“Continue doing what you’ve been doing all along - serving the customer and developing impressive business solutions.”

- Jim Flamm, Graco/Century Products



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