



ONBASE COMMUNITY DAY – COLONIAL SAVINGS, F.A.

8:30—9:00 AM	<p>Registration & Welcome <i>Paul Szemplinski, IDT</i></p>	<p>Welcome! Check-in, grab some coffee and prepare to learn new ways to extend your OnBase platform to lower costs, improve business efficiency and speed operations in your department.</p>
9:00—9:30 AM	<p>OnBase Solution Spotlight on Colonial Savings <i>James Hartigan, IDT</i></p>	<p>IDT will share three examples of how Colonial is already benefiting from OnBase and the value IDT's solutions provide these functional areas:</p> <ul style="list-style-type: none"> • ShareBase for CU Members-HMDA Reporting: How Colonial lowered operational costs, sped business processes and satisfied Government reporting by automating document collaboration and distribution. • Unity Forms for the Closing Department: How Colonial eliminated fee discrepancies and greatly reduced the number of re-disclosures by automating the closing disclosure process. • Business Process Management (Workflow) for Paperless Underwriting: How Colonial enabled their Underwriters to work remotely, eliminate paper mailing & handling costs, increase turnaround time and provide on-demand, 24X7 access to all Underwriting content in OnBase, creating a more competitive offering.
9:30—10:30 AM	<p>OnBase Content Services Platform Overview <i>Michael Nolfo, IDT</i></p>	<p>The OnBase Content Services Platform provides a set of modules—broken into functional areas of Capture, Manage, Access, Integrate, Measure and Store. Learn how the OnBase platform can address many of today's business concerns.</p>
10:30—10:45 AM	<p>BREAK</p>	
10:45—11:30 AM	<p>Unity Forms <i>Tom Grucza, Hyland</i></p> <p>Creating a basic Unity Form <i>Kasey Johnson, Colonial Savings</i></p>	<p>Learn about creating dynamic, process-ready forms without writing a single line of code. Empower Departments to rapidly create their own unique eforms with features like: built-in data validation, dynamic show/hide, and even logic-based conditions and actions. Unity Forms will increase the value of your OnBase investment and help automate more of your business processes than ever before.</p> <p>Watch how easy it is for Colonial to transform paper-based forms into intelligent, dynamic electronic forms.</p>



11:30—12:00 PM	ShareBase <i>Travis Roe, Hyland</i>	How do you share documents today? Do you use email or pass around physical documents or drives? Learn about the benefits of Hyland’s cloud-based file-sync-and-share application—ShareBase! You’ll also get an overview of ShareBase functionality, how it interacts with OnBase and workflow and discover some new features that are just around the corner.
12:00—1:00 PM	Lunch & Discussion	Open discussion! Network with Hyland, IDT and your fellow colleagues. Now is your time to ask the experts as you enjoy a delicious lunch sponsored by Kodak Alaris! Take this time to download the OnBase & ShareBase mobile apps.
1:00—2:00 PM	Information Governance, Compliance & Retention <i>Paul Szemplinski, IDT</i> <i>Tom Grucza, Hyland</i>	Establishing a comprehensive information governance policy is extremely important, but is often overwhelming. Learn how IDT can help you assess risks and formulate a sound IG policy to achieve corporate compliance all while reducing significant storage costs. We’ll also discuss the OnBase records management capabilities that will put these policies into motion, and how automation can ensure compliance.
2:00—2:45 PM	Brainware for AP <i>Tom Grucza, Hyland</i> <i>Rick Hamrick, Hyland</i>	Learn about Brainware, Hyland’s industry leading intelligent data extraction solution optimal for Accounts Payable Departments. Automate your AP process and take advantage of early payment discounts! Significantly reduce the time and labor required to manually inspect and key header and line item detail from any invoice. Utilize Brainware with OnBase workflow to significantly lower costs and speed invoice processing through intelligent learning, without requiring templates.
2:45—3:00 PM	BREAK	
3:00—3:45 PM	Case Management <i>Tom Grucza, Hyland</i>	These days it’s the high-volume, people-driven work that’s most difficult to manage and measure. It’s also often the most costly. OnBase WorkView Case Manager provides a 360-degree view of all the information your staff needs to drive the “unpredictable” work that requires their knowledge and expertise. Case Management provides a complete toolkit to create and rapidly deploy solutions that are natively integrated with OnBase.
3:45—4:00 PM	Raffle & Conclusion	Wrap up the day with IDT and Hyland Software. Additionally, please complete our post-event survey to be eligible for the raffle prize! You must be present to win. Thank you for joining us.