

ONBASE

INTEGRATION FOR DOCUSIGN ESIGNATURE

SUMMARY

The OnBase Integration for DocuSign eSignature allows you to electronically obtain signatures from people outside of your organization by providing complete management of processes that require secure, electronic signatures in the cloud. The integration manages the signature cycle within OnBase by automatically packaging documents and relevant signer information, sending this information securely to DocuSign, and collecting the completed documents. Obtain important signatures faster with the OnBase Integration for DocuSign eSignature.

BENEFITS

- **Extend secure signing to non-OnBase users** by integrating with DocuSign's cloud solution
- **Reduce cycle time** by making documents available in the cloud for signing – anytime, anywhere
- **Manage the process within OnBase** to keep all related content in one place – before and after signing
- **Control all aspects of the signing process** by automating the tasks related to obtaining signatures
- **Eliminate the cost associated with printing** documents in order to have them signed manually

DESIGN



The Integration for DocuSign eSignature allows OnBase to manage tasks around the signature cycle, uploading the documents to DocuSign for users to sign in the cloud. After signing, the document is downloaded to OnBase where it can continue to be processed.

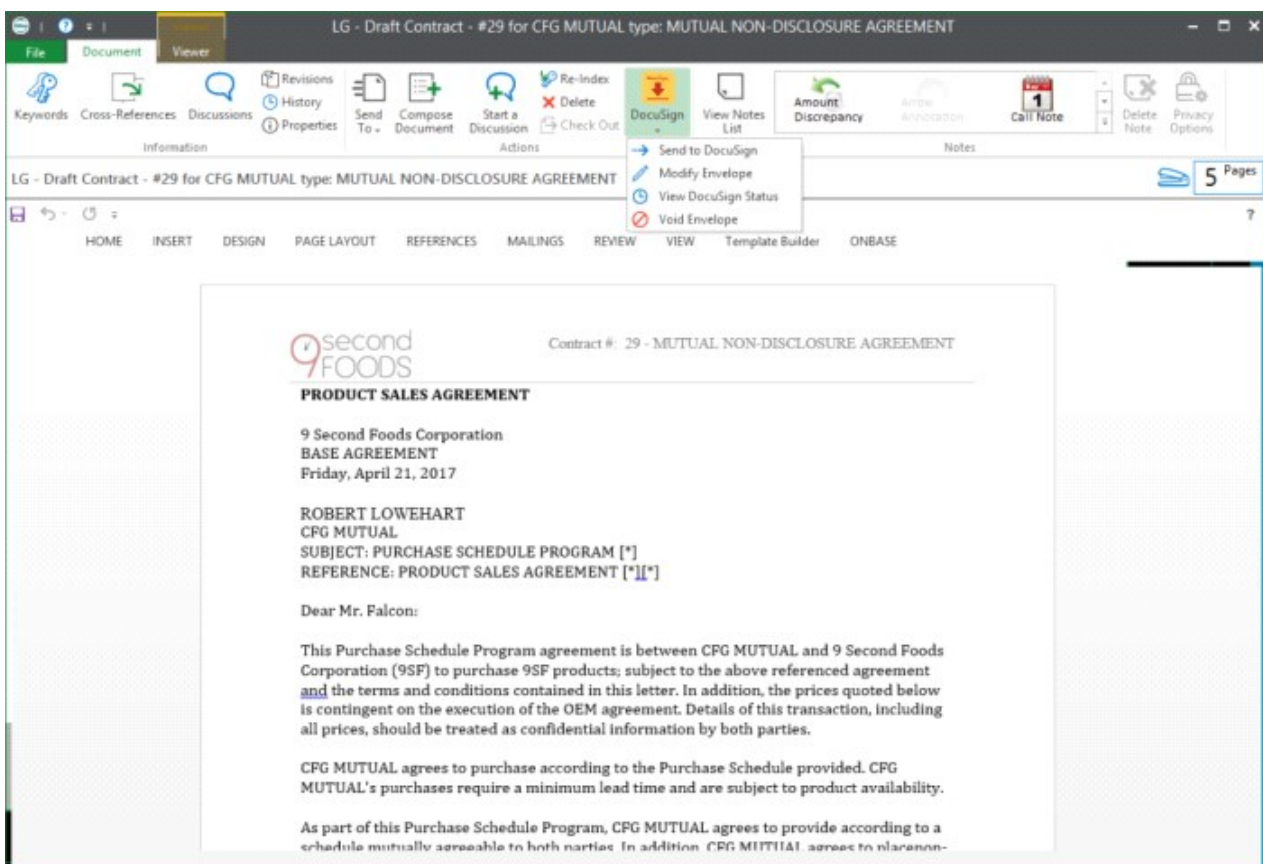
APPLICATIONS

- **Contract Management:** Contracts can be drafted and revised as a part of a Workflow process, and when finalized, the Integration for DocuSign can package the contract with related documents and upload it for signing. External parties can view the documents in the DocuSign cloud environment, sign, and the documents are returned to OnBase. The process can then be continued via OnBase Workflow for any approvals, and dates for renewal can be automatically generated.
- **New Customer Onboarding:** A new customer can sign their agreement and credit authorization online, eliminating the delays associated with sending signed copies through the mail across diverse geographic areas.
- **Lending:** Mortgage documents can be managed within OnBase and extended to DocuSign for borrowers to sign from their home, work, or mobile device – anywhere they can access the internet. Lenders will reduce the time it takes to sign loan documents, which means that the loans will start earning interest faster!

KEY FEATURES

- **Upload documents to DocuSign** interactively from the Unity Client or automatically using Workflow.
- **Match documents with DocuSign Templates** to utilize DocuSign features that enhance the signing process.
- **Check the status of a document** to determine where the document might reside in the signing process.
- **View an auditable history** of the full journey of the document through pre-signing, upload and return to OnBase.
- **Automatically download signed documents and the DocuSign Certificate of Completion** for archive and further processing.

INTERFACE



The DocuSign button in the Unity Client allows users to manage DocuSign envelopes without leaving OnBase

Envelope History

Envelope Details

Subject: Please review and sign this contract

Envelope ID: 9206ae44-d7cd-48a3-a1fc-6d65591ed314

Sent: 4/21/2017 3:32:29 PM EDT

Created: 4/21/2017 3:27:28 PM EDT

Location: DocuSign

Documents: LG - Draft Contract - #29 for CFG MUTUAL type: MUTUAL NON-DISCLOSURE AGREEMENT (14387)

Recipients: CINDY SMITH [cindysmith9sf@gmail.com]

Status: Completed

Status Date: 4/21/2017 3:35:15 PM EDT

Holder: Carolyn Kane

Activity history

Time	User	Action	Activity	Status
4/21/2017 3:27:28 PM EDT	Carolyn Kane (English) [API:206.183.28.67]	Registered	The envelope was created by Carolyn Kane	Created
4/21/2017 3:32:29 PM EDT	Carolyn Kane (English (US)) [API:206.183.28.67]	Sent Invitations	Carolyn Kane sent an invitation to Cindy Smith [cindysmith9sf@gmail.com]	Sent

Viewing the signing history from OnBase

Learn more at: <https://www.idt-inc.com>

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