



Service Specification Document - OnBase

Table of Contents

HYLAND ONBASE SERVICE DEFINITION DOCUMENT.....	1
1. About OnBase	1
2. OnBase Feature and Benefits	2
3. OnBase in the Hyland Cloud	5
4. Additional Hyland OnBase Services	7

HYLAND ONBASE SERVICE DEFINITION DOCUMENT

OnBase is a single enterprise information platform designed to manage your content, processes, and cases. OnBase centralises your important business content in one secure location and then delivers relevant information to you when you need it, wherever you are.

OnBase will enable you to increase productivity, deliver excellent customer service and reduce risk across your entire enterprise.

1. About OnBase

OnBase is a low code platform, enabling IT and business departments to accelerate solution delivery across the enterprise. With best-of-breed features from multichannel capture to workflow automation and robotic process automation, OnBase speeds up processes and reduces costs while securely supporting your organization's entire information lifecycle.

Figure 1 (below). OnBase makes your content instantly available to the people who need it, wherever they are, from almost any device or application.

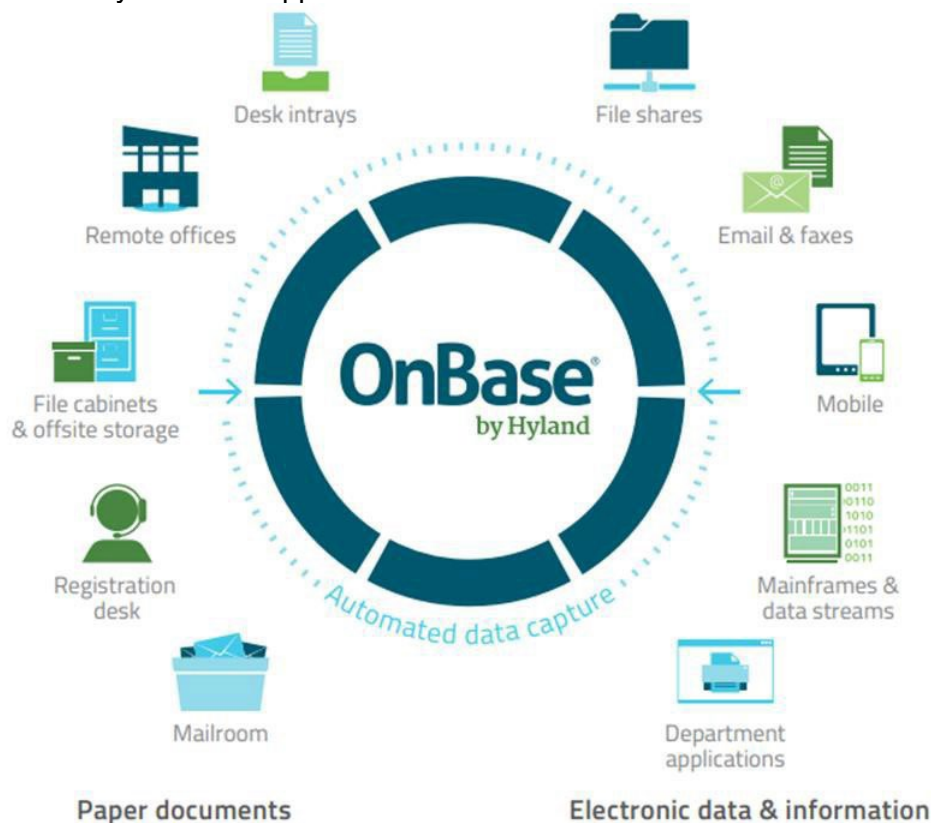


Figure 1

2. OnBase Feature and Benefits

OnBase is a low-code platform, enabling IT and business departments to accelerate solution delivery across the enterprise. Modular by design, OnBase allows you to tailor your solutions to your exact requirements.

OnBase delivers robust information management and process automation capabilities across devices and for all your employees, whether they're in the office or on the go.

Capture documents and data

Regardless of format, OnBase captures your documents and critical information right at the source. It then organises them in a single system with minimal human interaction – drastically reducing tedious and error-prone manual data entry.

OnBase provides a variety of methods to capture and validate the data you need from paper and electronic documents:

- **Capture both paper and electronic content:** Capture a single page or thousands of documents, where and when they enter your organization. Automatically capture electronic documents in their native format, directly from the applications you use daily. From CAD files to email messages and PDFs, OnBase provides ad-hoc and bulk processing for any file format. You can even use your mobile device to quickly upload photos and content while in the field, whether connected or offline.
- **Classify almost any file type and quickly extract necessary information:** OnBase identifies and captures relevant data, validates it against existing information and shares it with your other systems – saving time associated with manual data entry. The extracted data is used to automatically index documents in OnBase, making them instantly and securely accessible.

Manage information in one system

OnBase enables you to minimise process delays, data silos and disconnected documents and automate repetitive tasks while equipping workers to make better decisions.

Build content-enabled applications that support your requirements today and grow with you. Quickly create solutions tailored to your business problems without relying on costly custom coding. OnBase combines the ability to manage documents, data and processes in one system, so your information flows seamlessly throughout your organisation:

- **Manage documents:** Work electronically with all critical content, regardless of format. Empower users to easily search for documents while leveraging digital folders and file cabinets to keep content organised. Effectively handle revisions and versions, electronically sign and automatically generate documents for distribution to customers and constituents.

- **Manage processes:** Decrease processing time and increase employee productivity by optimizing your processes. OnBase automates predictable tasks while delivering exceptions and decisions to the right people, at the right time. Leverage OnBase to send notifications, enable approvals from mobile devices and load balance important work – increasing efficiency and keeping processes flowing.
- **Manage data:** Create data-centric and case management applications with OnBase, replacing antiquated databases, shared spreadsheets and legacy systems. Minimise the need for custom-developed or off-the-shelf solutions for areas such as HR onboarding, vendor management and fraud investigation. Provide users with access to all data, documents, tasks, and conversations that support a customer, case or project – from one interface.

With OnBase, your information finds you

OnBase makes your content become instantly available to the people who need it, wherever they are, from almost any device or application. Empower your users to access content the way that makes the most sense for them – allowing them to work more effectively from the office, on the road or in the field.

By providing the right information at the right time, OnBase equips your users to make better decisions, effectively serve customers and keep processes flowing.

With OnBase, your organisation provides access to information:

- **From a personalised, intuitive user interface:** Put the documents, forms, business processes and reports that are important right at users' fingertips.
- **While working in another business application:** OnBase integrates with other applications, such as your ERP system or Microsoft® Office products, equipping users to access content directly from their familiar screens.
- **While on the go:** Use OnBase mobile applications to instantly access your information, make decisions and monitor processes wherever you are – from an iPhone, iPad, Android or Windows phone or tablet.
- **When disconnected:** Give field workers the ability to retrieve, create and update documents, complete forms and upload photos while offline.
- **To those outside your organization:** Improve the experience of your customers, patients, constituents and students by allowing them to easily submit forms, track process status and access documents online.

Integrate OnBase with other applications

Get accurate information to make decisions faster in one central location. OnBase provides a variety of integration methods to equip users with instant access to all information they need from their preferred application.

Leverage information from another application to automate processes in OnBase such as filling out forms, triggering business workflows or composing documents. Sync data between systems to connect

documents and processes in OnBase with records in your business application in real time, empowering users to make critical business decisions with up-to-date information.

OnBase integrates with your key applications via a variety of integration options:

- **Purpose-built integrations:** Purpose-built integrations for many widely adopted applications, including PeopleSoft®, SAP®, Microsoft Office®, Outlook®, ESRI®, Ellucian, Workday and Infor. These specific integrations seamlessly feed information and documents between OnBase and the other applications.
- **Screen-level integrations:** With a point-and-click configuration tool, OnBase empowers your users to access documents, create forms and even begin OnBase processes directly from the screens of other business applications.
- **Data-level integrations:** OnBase offers an enterprise integration platform to coordinate an instantaneous, guaranteed exchange of data between your applications. By integrating your applications at the data-level, you ensure that the data across all your systems is consistent and up to date.

Measure process and system performance

OnBase provides real-time insights into the status of your processes, the completeness of your records and the health of your system – allowing you to take action when and where it's needed.

The system also facilitates audits and supports compliance initiatives by identifying the existence and accuracy of information.

With OnBase, organizations have a birds-eye view into the status of their people, processes, and systems, allowing them to:

- **Monitor:** OnBase provides immediate, actionable information about the status of business processes. With interactive reporting dashboards – available via web browser, Microsoft® SharePoint and mobile devices – managers and process owners proactively monitor processes and determine areas for improvement.
- **Audit:** Easily view what's in the OnBase system, as well as what's missing, aging or expired. OnBase also facilitates easier external audits by equipping auditors with access to content through a convenient web portal.
- **Report:** With comprehensive reporting capabilities, you have visibility into process status, outcomes and the health of the OnBase system. End users run the reports they need with an intuitive interface and without burdening IT or compromising system security.

Store, protect and destroy content

OnBase minimises risk and supports compliance by securely storing, protecting and destroying your information in accordance with applicable regulations – without needing to purchase additional third-party software or hardware.

By consolidating all your important content into one system, OnBase solves the problems associated with managing content across a variety of databases, systems, and storage locations. OnBase ensures that your content is secured and protected throughout its lifecycle:

- **Secure:** Via powerful encryption, OnBase secures your important data when it's at rest, in motion and being accessed. By working with your existing NT or LDAP authentication protocols, OnBase simplifies administration of your security policies while providing granular control over exactly who can access information and what they can do with it.
- **Protect:** OnBase protects your information by creating multiple electronic copies of each document on servers across different locations. Should the main file server become inoperable, OnBase automatically switches over to the next server in line, allowing continuous access. OnBase Cloud users benefit from having up to three duplicate copies of data in data centres across multiple geographical locations for maximum business continuity.
- **Destroy:** OnBase simplifies the implementation of retention plans and policies. When content is ready for disposition, OnBase sends it for review or automatically destroys it according to your requirements.

3. OnBase in the Hyland Cloud

The Hyland Cloud, Hyland's content management cloud platform, provides the same functionality and benefits of OnBase within completely outsourced, N+1 redundant, geographically dispersed data centers. Data centers are ISO 27001 certified and/or SOC 1, 2, or 3 audited. Customer preference dictates which data center will be used.

The Hyland Cloud has everything in place to help you achieve your compliance goals.

Appropriate technical controls are used to comply with all applicable privacy and confidentiality laws, rules, and regulations.

Hyland Cloud policies and procedures align with IEC/ISO 27001:2013, including Annex A controls. In addition, the Hyland Cloud aligns with guidelines found in NIST (National Institute of Standards and Technology) Special Publications including controls from standards such as SP 800-53, SP 800-171, SP 800-88, where applicable.



Figure 2 (above). An overview of Hyland Cloud responsibilities

To verify adherence to the controls detailed in the Hyland Cloud IS Policy Suite, the Hyland Cloud is SOC 2 audited on an annual basis. The Hyland Cloud SOC 2 audit is performed by a qualified external agency that extensively reviews policies, measures the Hyland Cloud against those policies, and makes a determination against those policies concerning Hyland's procedures and preparedness.

To further support adherence to the documented Hyland Cloud IS Policy Suite, the Hyland Governance, Risk and Compliance team completes internal audits on a quarterly basis.

Hyland Cloud commits to system availability ranging from 99% to 99.9% uptime, depending on the Service Class selected by the customer. Hyland offers a Recovery Point Objective ranging from 8 hours to 1 hour and a Recovery Time Objective ranging from 168 hours to 4 hours.

Market-leading fiscal remedies are associated with any breach of these commitments. Please refer to our terms and conditions for more details.

Installation

End users can access OnBase using standard Web browsers, which function as OnBase thin- clients in both Internet and Intranet environments, for both Windows and Mac operating systems. These thin-clients can be deployed to users without plugins or with automatically distributed ActiveX Controls. A Web Client deployment with ActiveX Control provides more advanced features to Internet Explorer users, including device integration, email client integration and advanced printing.

Power users assigned with admin tasks might need to install an OnBase client depending on their responsibilities, for example, an admin that wants to modify a Workflow or create a new WorkView application will need to install OnBase Studio

4. Additional Hyland OnBase Services

Hyland offers a comprehensive range of OnBase services to support you every step of the way enabling you to gain maximum value from your solution.

Please refer to our Hyland OnBase Cloud Support Services listing.

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