

Integration for DocuSign® eSignature

OnBase and DocuSign simplify electronic signature processes to enhance service on campus

Extend the secure signing process beyond OnBase to anyone, anywhere

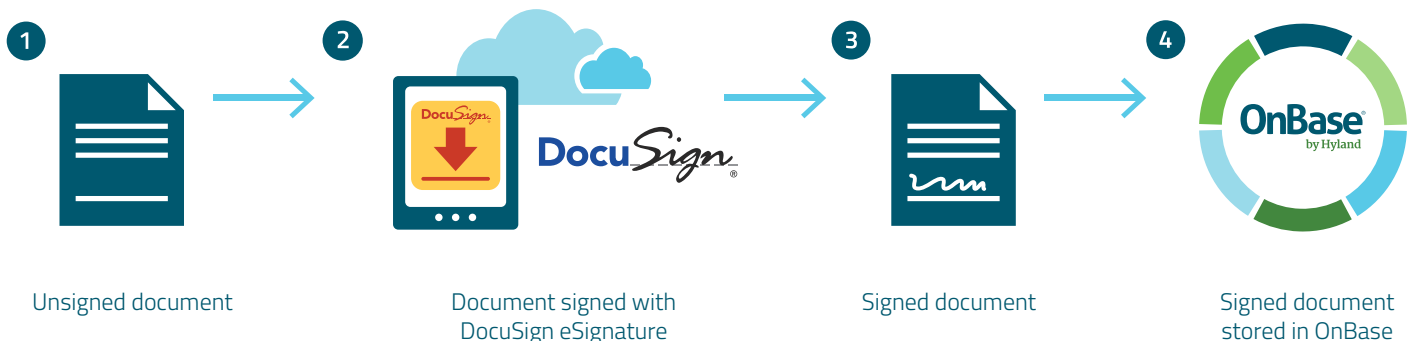
Automate signature capture, along with the rest of the business process


Archive signed documents and automatically set retention policies

In search of a completely paperless process, many institutions find that signature-related tasks create bottlenecks and delays. Some still capture signatures using pen and paper. For others, the move to electronic signatures requires employees to juggle tasks between siloed applications. The OnBase Integration for DocuSign eSignature provides a complete solution for business processes that require secure digital signatures on critical documents – such as financial aid verification, athletics, gift agreement management and contract management – while adding additional value through process automation, a complete audit history and more.

The integration supports the electronic signature process by automatically packaging OnBase documents and relevant signer information, sending this information securely to DocuSign, and collecting the completed documents. This allows institutions to expedite the signature cycle while giving them the peace of mind that comes with proven solutions like OnBase and DocuSign.

DOCUSIGN eSIGNATURE PROCESS FROM START TO FINISH:





With DocuSign managing the signature process, and OnBase streamlining the surrounding process and related documents, institutions benefit from an end-to-end, flexible solution.

Connects OnBase documents to DocuSign processes

The OnBase Integration for DocuSign eSignature accommodates unique business scenarios and the exceptions that inevitably occur. For unpredictable signing processes or unique documents, OnBase offers ad hoc upload to DocuSign. An embedded sending interface gives users complete customization of DocuSign placeholders, signer communications and template selection, without leaving the OnBase interface.

Configure additional features for users, managers or administrators to respond to a changing process or even correct an error. This way, users can interact with documents that are part of a DocuSign process without ever leaving their familiar OnBase environment, whether they just need to view the signing history or void or replace a document.

Adds automation and reduces manual work via OnBase Workflow

Regardless of the simplicity or complexity of a process requiring signatures, there will always be tasks to complete before and after a document is signed. Often the signature is only one small part of a larger process that may include multiple levels of approval, document creation and revision, notifications and more. OnBase offers strong process automation capabilities that streamline work and add consistency to the larger business process.

For example, when a signature is part of an existing process, leverage OnBase to automatically upload pre-configured documents to a DocuSign envelope. Institutions also automate many tasks associated with readying a DocuSign envelope – like entering the signer name and email – saving users valuable time and reducing the risk of mistakes.

Once signed, documents return automatically to OnBase via the integration. OnBase also tracks the status of documents that are out for signing and sends notifications as needed when the status of a document changes. In addition to saving time, this adds consistency to the process and reduces end user frustration.

Provides archival and retention of signed documents to support compliance

Once a document is signed, it may require additional processing or need to be saved alongside related documents to aid in decision-making. Secure storage with granular user permissions and flexible access options-including web-based, mobile, and desktop clients-ensures that authorized users are the only ones that can see content and related metadata. A proven and trusted solution, institutions rely on OnBase to keep their documents safe.

With OnBase and DocuSign, you not only simplify processes that require an electronic signature, but enhance student, parent and vendor service along the way.

Learn more at OnBase.com/DocuSign »

