

PRODUCT OVERVIEW

WORKVIEW

Low-code application development enables rapid application delivery with minimal coding, quick set up and fast deployment. This type of application development leverages platform-based visual design elements — such as drop-down menus and checkboxes — to develop, change and deliver business applications quickly and effectively. By enabling rapid application development, organizations can increase their digital agility and adapt to new challenges quicker than ever before. Furthermore, it provides a new alternative for overcoming the buy vs. build dilemma. WorkView is the solution that allows you to unlock this powerful application building capability from within the Hyland platform. This modern approach to application development allows organizations to:

- Increase speed of deployment
- Reduce costly IT sprawl
- Improve user adoption
- Maintain critical data security and governance
- Accelerate ROI

WorkView is a low-code, configurable framework that allows users to create business applications — without the need for custom coding — tailored to the needs of individual users, departments or an entire organization. At its core, it is a relational database building tool coupled with an intuitive interface designer to display interconnected data, content and processes. WorkView enables the creation and rapid deployment of content-centric or case-driven applications that are natively integrated with the OnBase suite of products.



“We realized immediately the power that OnBase has, in that we could build just about any database application we needed while replacing old applications that were going to be sunset,”

Sean Lemon

National project manager, UFP Industries Inc.

FEATURES

- Point-and-click configurable framework for rapid solution creation and deployment
- Integrated screen designer allows for complete customization of views and screens for all users
- Automatically links folders and documents to a related WorkView record
- Capture history and event logs for a complete audit trail and permanent record of all interactions and activities
- Natively integrated with OnBase Workflow allowing data records to be routed through new or existing workflows, which enables the automated execution of work without the need for custom scripting
- Complete view of business data including data from disparate, external data sources

BENEFITS

- Enables rapid application development
- Easily integrates data from internal and external sources
- Provides a centralized, complete view of information
- Improves the effectiveness of applications
- Reduces IT sprawl
- Eliminates disparate data management methods
- Seamlessly integrates with the OnBase product suite
- Allows for scalable application building without sacrificing data security and governance



USER EXPERIENCE

Below are sample screenshots from the user interface designed to provide a preview of the user experience.

The application workspace provides a complete, 360-degree view of information.

The screenshot displays the application workspace for Contract # 34. The top navigation bar includes 'File', 'Contract', and 'Tasks'. The main workspace is divided into several panels:

- Review Completed:** 1/30/2020 11:42:19 AM
- Agreement Signed:** 5/4/2021 12:16:51 PM
- Agreement Activated:** 5/4/2021 12:16:54 PM
- Agreement Expired:**
- Archived:**

The **Contract Info** panel shows:

- Due Date: 1/30/2020
- Expiration Date: [empty]
- Sub Contract Type: 1-WAY NDA
- Origin: EXTERNAL

The **Contact List** panel shows:

- Primary Contacts: Administrator, Cindy Smith
- External: [empty]

The **External Party** panel shows:

- Legal Name: SOMERSET WORKS
- ID: 45864

The **Amendment(s)** panel shows:

- [empty]

The **Tasks** panel shows a table with 2 records:

Priority	Subject	Status	Due Date	Completed By	Completion Date
Medium	Review and Approve Request	Done	1/13/2021 12:00:00 AM	Cindy Smith	5/4/2021 12:18:27 PM
High	Verify all signatures and clause exceptions	Open	5/6/2021 12:00:00 AM		

The **Notes** panel shows 1 record:

Created By	Created On	Note
MANAGER	1/12/2021 3:57:23 PM	office is closed until monday.

The **Documents** panel shows 2 records:

- CM | Agreement 1-WAY NDA | 1-WAY NDA | SOMERSET WORKS
- CM | Agreement Request | SOMERSET WORKS | 1-WAY NDA

The **Emails** panel shows: No documents found

Callouts 1-4 point to various elements: 1 points to the Agreement Activated icon; 2 points to the Sub Contract Type dropdown; 3 points to the Tasks table; 4 points to the Amendment(s) panel.

Business process workflow allows you to see where the information came from and where it will go

Contextual data provides a complete view of data related to the request

Act on the information with business activities such as assigning tasks, taking notes and viewing content

Easily view related content with the ability to create linked objects and quickly surface related documents

The screenshot shows a document viewer displaying a 1-Way NDA document. The document text includes:

1-Way NDA

THIS 1-WAY NDA (the "Agreement") is entered into on this 9/16/2017 by and between McGraw, Inc., located at 221 Lincoln Street, East, Old Forge, PA 17235 (the "Disclosing Party"), and with Somerset Works, located at 2576 Ash Street, Hanover, PA 17335 (the "Recipient" or the "Receiving Party").

The Recipient hereto desires to participate in discussions regarding a transaction. During these discussions, Disclosing Party may share certain proprietary information with the Recipient. Therefore, in consideration of the mutual promises and covenants contained in this Agreement, and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties hereto agree as follows:

1. Definitions.

(a) For purposes of this Agreement, "Confidential Information" means any data or information that is proprietary to the Disclosing Party and not generally known to the public, whether in tangible or intangible form, whenever and however disclosed, including, but not limited to: (i) any marketing strategies, plans, financial information, or projections; operations; sales estimates; business plans and performance results relating to the past, present or future business activities of such party, its affiliates, subsidiaries and affiliated companies; (ii) plans for products or services, and customer or supplier lists; (iii) any scientific or technical information, invention, design, process, procedure, formula, improvement, technology or method; (iv) any concepts, research data, know-how, works-in-progress, designs, development tools, specifications, computer software, source code, object code, flow charts, databases, inventions, information and trade secrets; and (v) any other information that should reasonably be recognized as confidential information of the Disclosing Party. Confidential information need

WorkView

demo/WVCLIENT/application/Asset%20Management/filter/1175

Hyland Asset Management CREATE NEW

Filters

My Work

- Display All My Tasks
- Display Request Pending My Approval
- Display All My Submitted Requests
- Display All My Requests (Issuer)

Asset Requests

- Display All Requests
- Display All Request Pending Approval
- Display All Lost Assets
- Display All Unassigned Requests

Assets

- Search All Assets
- Display All Assets
- Display All Assigned Assets
- Display All Available Assets
- Display All Assets Out for Repair

Administration

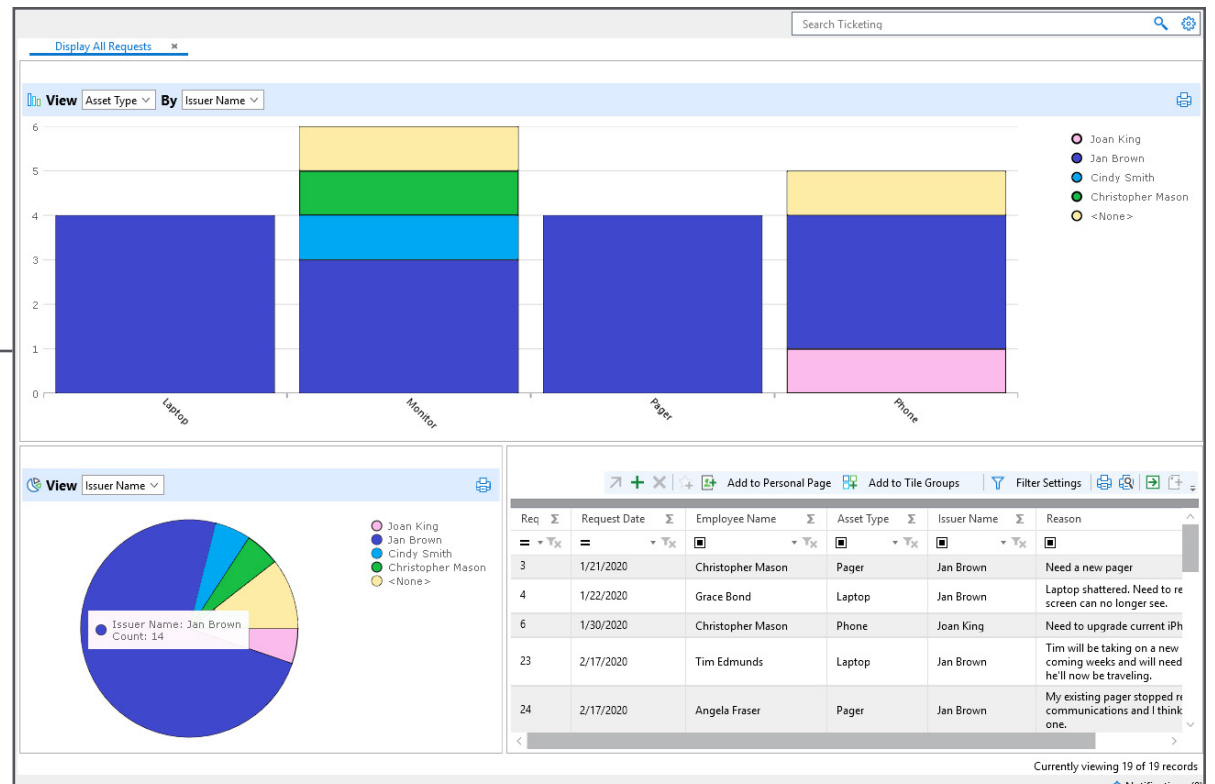
- Admin Panel
- Display All Employees (Internal)
- Display All Asset Types
- Display All Locations
- Display All Employees (External)

Viewing 18 out of 18 rows.

Request ID	Request Date	Employee Name	Asset Type	Issuer Name	Reason
3	1/21/2020	Cindy Smith	Pager	Jan Brown	Need a new pager
4	1/22/2020	Grace Bond	Laptop	Jan Brown	Laptop shattered. Need to replace since screen can no longer see.
6	1/30/2020	Cindy Smith	Phone	Joan King	Need to upgrade current iPhone
23	2/17/2020	Tim Edmunds	Laptop	Jan Brown	Tim will be taking on a new role within the coming weeks and will need a laptop as he'll n...
24	2/17/2020	Angela Fraser	Pager	Jan Brown	My existing pager stopped receiving communications and I think I need a new one.
25	2/17/2020	Sophie Walker	Phone	Jan Brown	I will soon be a remote employee and was asked to put in a request for a new mobile pho...
26	2/17/2020	Harry Nash	Phone	Jan Brown	I will be attending an upcoming trade show and need a separate mobile device so that I c...
27	2/17/2020	William Ogden	Monitor	Jan Brown	My manager told me to put in a request to upgrade my monitor to a larger one.
28	2/17/2020	Julia Robertson	Phone	Jan Brown	I've had the same phone for the last 8 years. Is there any way I can get an upgrade?
29	2/17/2020	Joseph Knox	Monitor	Jan Brown	I heard there are new monitors that are larger and don't have the driver issues that some...
30	2/17/2020	Dylan Metcalfe	Pager	Jan Brown	I will need a pager as I'm transitioning roles that now requires me to carry one of these d...
31	2/17/2020	Joan King	Monitor	Jan Brown	I would like to request a second monitor.
32	2/17/2020	Carl Randall	Monitor	Cindy Smith	Cracked monitor so I need a new one.

Quickly organize and sort information with configurable filter list views






Gain critical business insights with built-in dashboarding capability

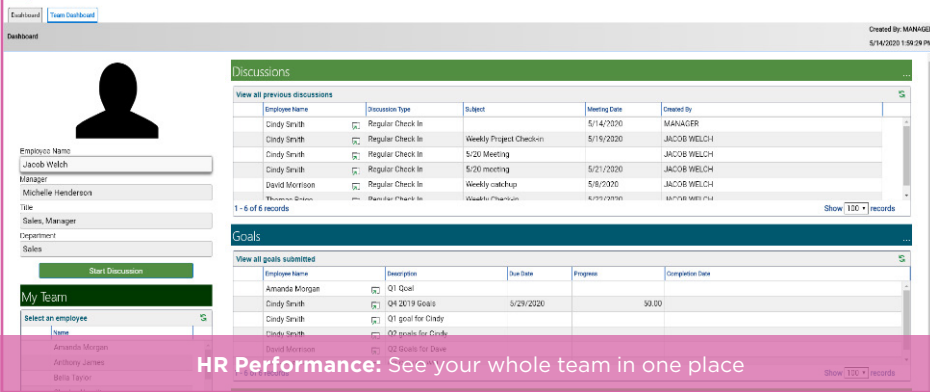


COMMON APPLICATIONS AND USE-CASES

The possibilities are virtually limitless with this type of low code development technology. There are use cases applicable across the many industries Hyland serves, including financial services and insurance, higher education, government, commercial and healthcare.

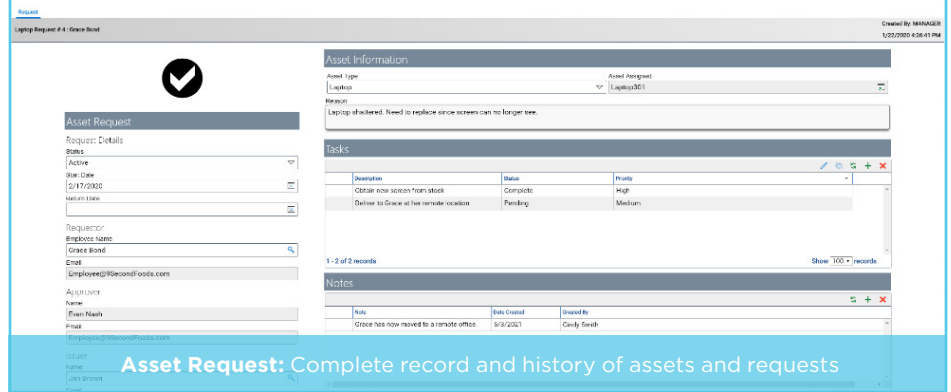
Common application examples include:

- 
Human Resources
 - Onboarding
 - Employee records and relations management
- 
Accounting and Finance
 - Invoice processing
 - Vendor management
- 
Information Technology
 - Asset management and tracking
 - Help Desk/Service ticketing
- 
Customer Service and Support
 - Complaint management
- 
Legal and Compliance
 - Contract management
 - Compliance monitoring



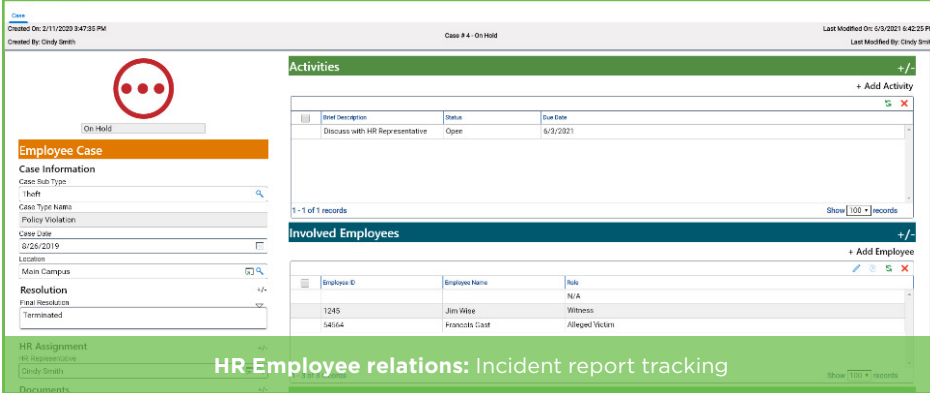
HR Performance: See your whole team in one place

The screenshot shows a dashboard with a sidebar for employee selection and a main area with two tables. The 'Discussions' table lists employee names, discussion types (e.g., Regular Check In), subjects (e.g., Weekly Project Checkin), meeting dates, and creators. The 'Goals' table lists employee names, descriptions (e.g., Q1 Goal), due dates, and completion dates.



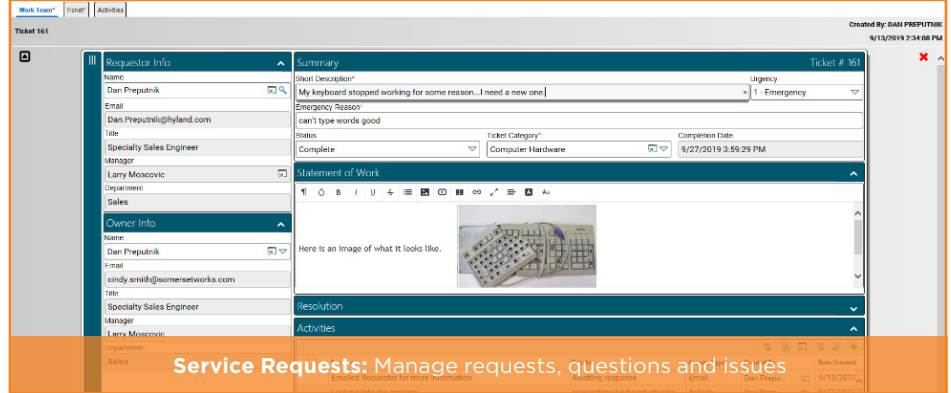
Asset Request: Complete record and history of assets and requests

The screenshot shows a form for an 'Asset Request'. It includes fields for 'Asset Type' (Laptop), 'Asset Requested' (Laptop), and 'Reason' (Laptop shattered, need to replace since screen can no longer see). Below the form is a 'Tasks' table with columns for Description, Status, Priority, and Assignee. The tasks listed include 'Obtain new asset from vendor' and 'Deliver to Grace at her remote location'.



HR Employee relations: Incident report tracking

The screenshot shows a dashboard for 'Employee Case' management. It features a sidebar with filters for 'Case Sub-Type' (e.g., Policy Violation) and 'Resolution' (e.g., Terminated). The main area has an 'Activities' table with columns for Description, Status, and Due Date, and an 'Involved Employees' table with columns for Employee ID, Employee Name, and Role.



Service Requests: Manage requests, questions and issues

The screenshot shows a 'Ticket # 161' detail view. It includes a 'Requester Info' section with fields for Name, Email, Title, Department, and Manager. The 'Summary' section contains a 'Short Description' and 'Emergency Reason'. The 'Statement of Work' section includes an image of a keyboard. The 'Resolution' section is currently empty.

Learn more at [Hyland.com/LowCode](https://www.hyland.com/lowcode)



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