



## ShareBase Commercial Use Cases

ShareBase by Hyland is an enterprise file-sharing product that provides secure, cloud-based sharing while ensuring your organization retains ownership and control.

### OnBase and ShareBase Together

OMEDA - \*CASE STUDY\* - securely sharing subscription documents in OnBase with offshore partners and worldwide customers; reduced manual touch points and increased volume from 100 to 400 batches per day

Law Company - \*CASE STUDY\* - Lawyers and sales employees are sharing confidential documents internally and externally

Universal Forest Products (UFP) - (1) Sharing AP invoices with outside vendor who reviews/negotiates contracts for them; gave the vendor a ShareBase User account; invoices are in OnBase; Workflow places a copy of the invoices into a ShareBase Library which the vendor can then access; "super successful" and vendor who is not very tech savvy is very pleased. (2) Engineering drawings; use API with Docusign; button in WorkView to upload drawings to ShareBase; link is then created and sent to customer. They no longer have to give customer a login/access to their database. WorkView mobile does not display docs, so putting them into ShareBase Library to grant access with link. (3) Electronic Funds Transfer changes/authorization; when vendor wants to make a change, complete Unity form which creates ShareBase folder with Link for 24 hours to access change document and upload back to Universal; uploaded document comes into OnBase and has a series of authorizations. They do not want to use email for this secure information in fear of hackers

Real Estate Business - to share documents with lenders and suppliers to support procurement. Also in the process of designing a solution with construction design process for drawings and specifications

Digital Power and Motion Control Business - incorporate the solution into their order and production process

Oil & Gas Industry - Corporate Innovation, Data Management Operations, Land Trades and Divestitures

Law offices - collaboration on case files for mediation between parties

Food Industry - Sharing photos of damaged food with vendors; photo taken with iPod at loading docks of 30 distribution centers which goes into OnBase using OnBase mobile app and Unity form; ShareBase Link is sent weekly to each vendor with photos of damaged goods

### ShareBase Solutions

Hyland –\*CASE STUDY\* – financial audits from external parties



**Naviant** —\*CASE STUDY\* (*attached*) – utilizes ShareBase to share internal benefits documents with incoming employees who do not have access to intranets yet

**AP Solution** - Archival - converted AP paper-based files to ShareBase; planning on doing the same for AR and HR files

**Business Expansion Solution** - secure sharing internally between US and China offices

**Board Agenda and Meetings** - sharing Strategic Planning documents with board members (to replace Google Drive) as well as using it for upper and middle management to share and lock down content internally.

**Document Management Solution** - receiving and sharing large files, i.e., engineering drawings, with outside vendors and ship builders - previously the vendor had to figure out how to get them the files. Internal sharing/collaboration of pre-OnBase docs. Mobile access important. (Interaction with OnBase expected in future; OnBase will store ship technical docs, engineering drawings.)

**HR Solution** - access drawings, spec sheets, and forms on the go. Maintain control over who has access to these drawings and revoke rights either upon employee separation or information expiration

**Mobile Access** - sharing internally which is helpful when outside of the office---access at anytime from anywhere as well as ease of access from multiple devices; sharing externally with other attorneys and clients for divorce law firm

**Enterprise File Sync and Share Solution** - replacing network drive, servicing customers, communicating with lenders; displaced Box for sharing internally and externally; us ShareBase to send/receive information from customers for small tax prep business; attorneys sharing and receiving large files with courthouse officials and law firm clients when files are too large for email; solution used for storage with greater control and visibility to replace 1 Dropbox account shared across the entire organization

**Project Management Solution** - sharing daily site photographs for construction projects

**Sales and Marketing Solution** - sharing large marketing images and videos internally and externally; expansion to accounting for tax docs; collaborating on projects among departments; distribution of sales brochures; marketing uses internally to prep (review and approve docs) for annual meetings; sharing externally with clients (photos, videos, databases) for plumbing inspections in residential and commercial developments

**Vendor Management Solution** – a method to receive large files from vendors and store them until they transfer to primary business system; work with external contractors to get them information they need to complete jobs and purge those job folders when they are complete