

Integration for DocuSign® eSignature

OnBase and DocuSign move business forward, adding electronic signatures to any solution

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 organizations find that signature-related tasks create bottlenecks and delays. For some customers, signatures are still captured 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, 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 organizations 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, organizations will benefit from an end-to-end, flexible solution.

Connects OnBase documents to processes in DocuSign

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 allows users complete customization of DocuSign placeholders, signer communications and template selection, without leaving the OnBase interface.

Organizations can configure additional features for users, managers or administrators, allowing them to respond to a changing process or even correct an error. Without leaving OnBase, they can access a document's status in DocuSign, view the signing history, and void or replace a document when a mistake is made. This gives them the ability to interact with a document that has entered a DocuSign process without leaving their familiar OnBase environment.

Adds automation and reduces manual work via OnBase Workflow

Regardless of the simplicity or complexity of a process requiring signatures, tasks will always need to be completed 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. Strong process automation capabilities offered through OnBase Workflow streamline work and add consistency to the larger business process.

For example, when a signature is part of an existing process, OnBase Workflow can be leveraged to automatically upload pre-configured documents to a DocuSign envelope. Many tasks associated with readying a DocuSign envelope can be automated—like entering the signer name and email—saving users valuable time and reducing the risk of mistakes.

Once signed, documents are returned automatically to OnBase via the integration. Users do not have to keep track of documents that are out for signing – OnBase Workflow can manage that for them, and send 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, organizations can feel comfortable relying on OnBase to keep their documents safe.

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