

# Make Your Work Life BETTER.

NAVIANT  
SUMMIT

MAY 16 & 17

## TUESDAY, MAY 16 - Eastern Time Zone

10:30 - 10:50	OPTION 1 Early Bird Fun & Friendly Trivia
	OPTION 2 OnBase 101
11:00 - 11:20	General Session
11:30 - 11:50	OPTION 1 What's New in OnBase Foundation
	OPTION 2 Payment Processing with InvoiceCloud
12:00 - 12:20	OPTION 1 Hyland's Simplified Pricing Model - What is it and should I convert?
	OPTION 2 How to Identify Automation Needs Across Your Organization
12:30 - 12:50	OPTION 1 Demystifying the Hyland Cloud
	OPTION 2 Contract Management Automation
1:00 - 1:20	OPTION 1 Take Workflow to the Next Level
	OPTION 2 Introducing the OnBase App Builder
1:30 - 2:00	General Session
Late Afternoon	In-Person Social Event <small>Times and venues vary based on your location. See page 3 for details.</small>

## WEDNESDAY, MAY 17 - Eastern Time Zone

10:30 - 10:50	OPTION 1 Government Industry Session
	OPTION 2 Higher Education Session
	OPTION 3 Naviant Managed Services
	OPTION 4 Early Bird Fun & Friendly Trivia
11:00 - 11:30	SHIFT Happens: How to Manage Through Digital Change While Retaining Employees and Boosting Productivity
11:30 - 11:50	OPTION 1 OnBase WorkView - I Want to See Everything
	OPTION 2 OnBase Integration for Salesforce
12:00 - 12:20	OPTION 1 OnBase Reporting Dashboards
	OPTION 2 Artificial Intelligence for Intelligent Document Processing
12:30 - 12:50	OPTION 1 How AP Automation Drives Efficiency in Accounting Processes
	OPTION 2 Reduce Risk & Improve Compliance by Managing Retention with OnBase
1:00 - 1:20	OPTION 1 Optimizing the Digital Employee Experience with Integrations
	OPTION 2 Fast-Track Your Digital Workload with OnBase & Hyland RPA
1:30 - 2:00	General Session - Innovation Award Winner Announcement

# TUESDAY, MAY 16

10:30 - 10:50 ET

## Early Bird Fun & Friendly Trivia

hosted by Rachel Lahti & Brian Carl from Naviant

Start your day with trivia! We will only be covering fun topics, like TV shows, popular movies, sports, and toys and games. There will be three rounds, lasting five minutes each and a prize will be given to the winner of each round.

## OnBase 101

presented by Michael Coyne & Nela Khalaf from Naviant

OnBase is a single enterprise information platform for managing content and processes in a secure, centralized location. It provides the correct information to the right people whenever and wherever they need it. OnBase empowers organizations to become more efficient, agile, and effective. How does OnBase do it? Join us as we explore the six components that make up OnBase and how this solution can improve your work life.

11:00 - 11:20 ET

## General Session

hosted by Ed Modjeska from Naviant

Senior Vice President, Ed Modjeska, will kick off the Summit and share Naviant's obsession with helping our clients succeed in their intelligent automation journey, and realize a better work life. We'll share new ideas and review how to make the most of your time at the Summit.

11:30 - 11:50 ET

## What's New in OnBase Foundation

presented by Colleen Alber from Hyland Software

We will spotlight the most exciting Hyland product innovations for both OnBase administrators and end users alike. Learn how to combine the latest platform enhancements in OnBase Foundation with existing (and upcoming) technologies to build better solutions!

## Payment Processing with InvoiceCloud

presented by Chris Krause from Naviant & Jacquie Weseloh from InvoiceCloud

Learn how to securely perform one of the crucial customer interactions of payment processing by using InvoiceCloud. Both OnBase and your existing customer-integrated systems can benefit from a uniform payment process with InvoiceCloud and the Naviant InvoiceCloud Connector. This powerful combo will make your customer payment engagement moment an experience that will create repeat customers.

12:00 - 12:20 ET

## Hyland's Simplified Pricing Model: What is it and should I convert?

presented by Ed Modjeska from Naviant

The 2021 launch of Hyland's new Simplified Pricing Model provided a more modern licensing and pricing model to align with customers' solutions. Still, this change continues to stimulate questions. This session will provide an overview of key features of the new licensing model, a comparison to legacy perpetual licensing, and a review of potential benefits for your organization.

## How to Identify Automation Needs Across Your Organization

presented by Chris Krause from Naviant

Whether you are thinking about implementing an intelligent automation solution or have already made the investment but aren't leveraging it to its full capabilities, this session is for you. We will explore inspiring use cases and helpful tools to help you recognize and prioritize automation opportunities that will drive the biggest value for your organization.

12:30 - 12:50 ET

## Demystifying the Hyland Cloud

*presented by Mel Gatwood & Mark Miller from Naviant*

A move to the Hyland Cloud provides an improved experience for your customers, increasing productivity by reducing the burden of managing infrastructure, or lowering your risk of a cybersecurity attack. Naviant's Cloud Center of Excellence team is dedicated to guiding you through your cloud migration and providing the expertise to help you manage your environment post-migration. Come see how Hyland Cloud compares to other cloud offerings and how the Naviant team helps you demystify the process.

## Contract Management Automation

*presented by Trevor Graham & Jeff Comer from Naviant*

Streamlining and automating the process of creating, reviewing, and storing contracts can save time, reduce errors, and improve the efficiency and effectiveness of the contract management process. This session will provide an in-depth look at contract management automation and the benefits it can bring to your organization.

1:00 - 1:20 ET

## Take Workflow to the Next Level

*presented by Jeff Comer & Nela Khalaf from Naviant*

This is for users who have mastered workflow and forms, and existing WorkView users who are looking for ways to optimize their low-code applications. WorkView is a powerful tool that enables rapid application development, but when combined with additional capabilities of the OnBase platform, it becomes a dynamic, comprehensive solution. We will dive deeper into the interaction between WorkView and some of its complementary capabilities including workflow actions, ad-hoc triggers, external data classes, reporting dashboards, and more.

## Introducing the OnBase App Builder

*presented by Colleen Alber from Hyland Software*

The OnBase App Builder allows admins to reimagine OnBase. End users can now access OnBase through tailored web interfaces designed to optimize the work they do, rather than organized by the software module they are using. Tiled "quick access" interfaces provide direct access to frequently used OnBase features like document upload, search and processing - but named using the user's language (not ours)! Join us for a preview of the OnBase Application Builder - slated for initial release with OnBase Foundation 23.1.

1:30 - 2:00 ET

## Afternoon General Session

*hosted by Ed Modjeska from Naviant*

Hear from Naviant customers as they reflect on their digital evolutions. These customers will share their organization's Intelligent Automation or Digital Transformation journey.

## Social Event (time varies by location)

We will host in-person social events in New York, Wisconsin, Utah, Nevada and California for you and a guest. The social event will include heavy appetizers, drinks, and guaranteed fun.

### New York

Joey's Italian Restaurant  
6594 Thompson Road  
East Syracuse, NY  
Starting at 5:30 PM ET

### Ohio

Vaccaro Trattoria  
1000 Ghent Road  
Akron, OH  
Starting at 6:00 PM ET

### Wisconsin

Bonfyre  
2601 W Beltline Hwy  
Madison, WI  
Starting at 4:30 PM CT

### Utah

Rodizio Grill  
600 South 700 East, 2nd Floor  
Salt Lake City, UT  
Starting at 6:00 PM MT

### Nevada

Wild River Grille  
17 S Virginia St  
Reno, NV  
Starting at 5:30 PM PT

### California

The Revival Rooftop  
500 J Street  
Sacramento, CA  
Starting at 5:30 PM PT

# WEDNESDAY, MAY 17

10:30 - 10:50 ET

## Government Industry Session: Enhance Citizen Engagement with the Hyland Content Portal

*presented by Kevin Crawford from Naviant & Ryan Kyre from Hyland Software*

Learn how Hyland's partnership with Jadu, the Hyland Content Portal for Government, can provide an integrated portal solution for delivering exceptional digital services. This enables citizens to conveniently self-serve on their mobile, tablet, or desktop devices from any location. With a modern public-facing portal experience, the Hyland Content Portal for Government can connect to OnBase to provide online forms, document upload and tracking, payment processing, and workflow. You'll see how it can help you deliver new and improved online services to end-users while enhancing engagement.

## Naviant's Managed Services: Keeping the Lights On

*presented by Jeff Luker & Mark Miller from Naviant*

Many organizations struggle to maximize the value of OnBase due to competing priorities, unexpected outages, and a lack of expertise. With Naviant Managed Services, we augment, supplement, or outsource your OnBase support team to industry experts. We will review our managed services offerings and future vision. Plus, we'll share success stories from organizations already using Naviant Managed Services.

## Higher Education Industry Session: A Common Thread Across Higher Ed

*presented by Bob Owens & Matt Ehde from Naviant*

To be competitive, efficient, and effective, you must make meaningful use of your data across your campus. This goes beyond the traditional use of content management with storage and retrieval and requires unlocking the power of process automation and reporting. But, knowing where to start can be daunting with so many automation opportunities. Learn how Naviant can help simplify use case identification with a single platform and how we can help you find the common thread that connects any and every process across your campus.

## Early Bird Fun & Friendly Trivia

*hosted by Rachel Lahti & Brian Carl from Naviant*

Start your day with trivia! We will only be covering fun topics, like TV shows, popular movies, sports, and toys and games. There will be three rounds, lasting five minutes each and a prize will be given to the winner of each round.

11:00 - 11:30 ET

## SHIFT HAPPENS

### How to Manage Through Digital Change While Retaining Employees and Boosting Productivity

*presented by Brian Carter, Motivational Speaker*

Are your leaders ready to help your organization shift to digital and manage resistance to change? Some employees love new ideas, software and processes, but others may feel threatened. Leaders need to be aware of how today's great, new opportunities can be seen as "stranger danger" by key personnel. You don't want to lose your best people in an important time of transition. Brian Carter's digital transformation keynote programs deal with the typical obstacles and stresses that leaders and transformation teams encounter by combining hilarious jokes and true stories with real business case studies and research from organizations who've already successfully completed the journey you're now beginning.



11:30 - 11:50 ET

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## OnBase WorkView - I Want to See Everything

*presented by Jim Morrison from Hyland Software*

See some of the latest enhancements for the OnBase 22 release. Learn about building the latest user-enhanced views, Custom Rules and Actions, and the WorkView API. We will also cover how to quickly create an application using the WorkView ACE (Application Creation Excelerator), which uses MS Excel format for the core building components.

## OnBase Integration for Salesforce

*presented by Colleen Alber from Hyland Software*

This cloud-ready OnBase solution allows organizations that use Salesforce to associate and store all critical documents related to their CRM application, independent of use case. Join this session to see how Hyland helps customers better leverage investments to boost productivity while enhancing their Salesforce experience.

12:00 - 12:20 ET

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## OnBase Reporting Dashboards

*presented by Jim Morrison from Hyland Software*

Companies in every industry struggle to find valuable business data and gain the day-forward insight to be proactive versus reactive. Many disparate systems store critical data, but combining the data, content, and process in a single view is challenging. Reporting Dashboards provide the tools necessary to combine your business data with any content and workflow processes you have within your Hyland system today. They're also no-code, easy to customize, and include many tools like maps, graphs, thresholds, and custom views. Join this session to learn how Reporting Dashboards work and how they can solve your data-related challenges.

## Artificial Intelligence for Intelligent Document Processing

*presented by Mark Miller from Naviant*

The capture of unstructured content has roots that date back more than 30 years. Today's capture, aka Intelligent Document Processing, takes adVANTAGE of Artificial Intelligence and Machine Learning to take automation to the next level. Vantage is a low-code platform that provides the foundation for automation, a title it earned due to its experience processing billions of documents. Pre-built "skills" incorporate capture and integrations, making deploying and promptly driving value into your organization easier. In this session, we'll discuss how Vantage will help better your work life with capture and automation efforts by taking advantage of the latest Artificial Intelligence technology.

12:30 - 12:50 ET

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## How AP Automation Drives Efficiency in Accounting Processes

*presented by Trevor Graham & Michael Coyne from Naviant*

Are you tired of the time-consuming and error-prone nature of manual accounts payable processing? AP automation can revolutionize your business, increase efficiency, reduce errors, and save time and resources for more valuable tasks. So don't waste any more time on manual AP processing. Join us to learn how to get started today and see the difference it can make for your business.

## Reduce Risk & Improve Compliance by Managing Retention with OnBase

*presented by Colleen Alber from Hyland Software*

Organizations are looking to reduce risk and promote stability whenever and wherever possible. As a result, sound records management and retention policies are more important than ever to ensure solutions remain compliant and do not invite unnecessary risk. With OnBase's robust suite of records management products, users can focus on their work while automated retention seamlessly works behind the scenes to ensure content is destroyed in accordance with their policies. In this session, we'll cover everything OnBase retention, from Document Retention and Records Management to Governance Rules as a Service (GRaaS) and physical records management.

1:00 - 1:20 ET

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### **Optimizing the Digital Employee Experience with Integrations for SAP SuccessFactors & Workday HCM**

*presented by Tricia Shields from Naviant & Tess Venhoff from Hyland Software*

The digital employee experience is more than a differentiator in today's evolving workplace. It's a necessity. Tricia Shields, VP of Human Resources at Naviant, and Tess Venhoff, Hyland Technology Evangelist, for insights on how the optimal digital employee experience creates a better work life. They'll cover common challenges organizations face, why content and information are critical to the digital employee experience, and how Naviant is delivering solutions that achieve these goals with systems like SAP SuccessFactors and Workday HCM.

### **Fast-track Your Digital Workload with OnBase & Hyland RPA**

*presented by Ken Payne from Hyland Software*

Every organization faces the same goal: do more with less. Yet, as workloads increase, resources are limited, systems are taxed, and users are stressed. Hyland's portfolio of intelligent automation solutions can help eliminate many tedious, manual, low-value tasks. While Workflow provides the foundation of intelligent automation in OnBase, the addition of Hyland RPA has opened new doors, enabling intelligent automation solutions to extend even further. We'll explore how OnBase & Hyland RPA can be used to transform key business processes and automate more than ever.

1:30 - 2:00 ET

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### **General Session**

*hosted by Ed Modjeska from Naviant*

We'll wrap up the Naviant Summit with exciting announcements and updates! Join us to congratulate the 2023 Naviant Innovation Award winner. We will also reveal exclusive attendee promotions and announce door prize winners.