

# EXTEND VALUE OF EXISTING APPLICATIONS, ENHANCE PROCESSES BY INTEGRATING WITH ECM

Integrations optimize efficiency a number of ways. Decisions about what kinds of integrations an insurance organization will deploy depend on user roles and needs, the degree of automation the insurer is looking to achieve and which business processes it's looking to streamline.

Designed primarily to improve user-initiated interactions between systems, the most basic integrations provide users the ability to retrieve documents and files from within their application screens. Some insurers have achieved efficiency by building this basic-level integration between their claims, policy admin or ERP system and their document management solution. One of the benefits, for example, would be the ability for a user to automatically populate indexing fields with the data values from those core business applications when they are importing documents into their document management system.

The information travels in one direction – either from the core business application to the document management system or vice versa, depending on the task at hand. Process improvements definitely occur with these basic integrations, but insurers don't have the automation capabilities offered by more advanced integrations. More advanced integrations don't require user initiation, but rather allow the systems themselves to complete tasks automatically. Data travels to and from one system's database table to the other system's database table, ensuring consistency between the systems.

For example, when required documents enter the document management system, that system automatically updates the claims file in the claims system without any human intervention. Or, when a customer's information changes in the policy admin system, the corresponding indexing or search fields in the document management system automatically update as well.

Automating the exchange of information between systems certainly improves efficiency; however, to achieve the maximum level of process efficiency, the information exchange must occur in real-time. Unfortunately, few insurers have document management solutions that can support this type of integration. It's not much easier for those insurance organizations that have implemented more modern enterprise content management (ECM) solutions.

With only a select number of ECM providers able to support automated, bi-directional data exchange in real-time, many of those that do typically require a great deal of custom programming code and administrative oversight. As any experienced IT professional knows, custom-coded solutions can become difficult and expensive to support. IT departments simply don't have the time to write new code and perform a beta test every time someone needs a change made to the integration, or when one of the connected applications gets a software upgrade. In an enterprise environment, these kinds of highly custom-coded solutions are simply unsustainable.

This is why Hyland Software designed system-to-system integrations that require little to no custom code. Available for select line-of-business applications, OnBase integrations strategically leverage a suite of technologies to improve your existing claims, policy admin or ERP system's performance without placing additional burden on IT.

## ADVANTAGES OF USING A MIDDLEWARE PLATFORM

There are many ways to integrate your business systems with other applications, but utilizing a middleware platform approach offers the most comprehensive range of benefits. Three of the most significant advantages that set these OnBase integrations apart include:

- Guaranteed real-time delivery
- Code-free connections
- Easy configuration

## GUARANTEED REAL-TIME DELIVERY TO ENSURE UP-TO-DATE INFORMATION

Batch processing is widely used as it allows IT to schedule processing when resources are less busy. Overnight batch processing is common. Users input data during the day and a program processes "batches" of data at night, executing the tasks.

For integration solutions promising "real-time" delivery of information but relying on batch processing to exchange data between applications, there is a very real delay between the time a batch processes and when an end user can access accurate data. There is also the possibility that a task will not execute, as problems with batch processing are common.

With solutions that utilize batch processing, if a user has a record open in the claims system – say, to verify that a claim meets coverage requirements – that record becomes locked. If the system runs a batch process update while this record is locked, the claims system produces an error message. The exchange of data comes to a halt, and the transaction does not complete until IT staff manually intervene, scrolling through lines of code to find the error. If the insurer runs its batch processes overnight, the error might not be found until the next day and it may take another day (or two or three) before it's corrected. While this delay of information is occurring, the claims record remains out-of-date and inaccurate – with information held hostage.

In this scenario, adjusters are unable to move forward, delaying the claims handling process. They also cannot accurately respond to questions about the status of the claim, impacting customer service. Over time, these kinds of errors take their toll, inhibiting insurers' ability to meet today's customer expectation, and ultimately, affecting profitability.

With an OnBase integration, there's no need to babysit a batch process. The integration server continues to retry against locked records until they are unlocked. The transaction completes automatically. No data is lost, records are updated in the systems and staff have immediate access to the most current information. Delivery is guaranteed and downstream processes and decisions move forward based on timely, accurate system updates.

### **CODE-FREE CONNECTIONS ALLEVIATE CHALLENGES**

Another advantage of this approach is the ability to establish connections between systems without writing any custom programming code. IT administrators select from a suite of pre-configured adapters which ride on top of the middleware platform to open up avenues of communication with various applications.

The OnBase integration server comes with more than 20 adapters designed to communicate with different software systems. These adapters provide the plumbing that connects OnBase to different line-of-business applications, offering instant connectivity to various external systems. To create customized integrations, the middleware platform's architecture doesn't change – the adapters do. Integrating with different systems is simply a question of which adapters will work best to address your needs.

### **EASY CONFIGURATION EXPEDITES IMPLEMENTATION**

The integration server features a visual mapping interface, where administrators make modifications – by tweaking the adapters, not starting from scratch. Complex, large mapping tasks are easy to navigate. Based on the adapters selected, the OnBase middleware server automatically generates a visual graphic. An administrator only needs to “drag and drop” to set up the way the systems should connect. Once the visual mapping is complete, OnBase instantly publishes the service, making it available for use by the core business application – like your claims, policy admin or ERP system, for example – to complete the integration. Implementation happens quickly and with minimal interruption to daily operations.

Line of business applications are among the most significant software purchases an insurer makes. Optimizing system performance helps achieve the highest possible return on that investment. To do this well, it's essential to consider the ECM solution as well as integration itself and what kind of support they'll require both now and into the future as your needs change over time.

OnBase integrations provide insurers with a highly sustainable way to simplify interoperability, increasing the performance of existing applications and extending their lifetime.

### **LOWER TOTAL COST OF OWNERSHIP**

By using a proven integration platform and a host of pre-programmed adapters to connect specific applications, OnBase integrations provide a lower total cost of ownership. Point-and-click configuration allows your OnBase integration with select line-of-business applications to be set up faster and enhanced easily. The deep configurability of OnBase also provides unparalleled opportunities for deploying additional process-specific integrations.

Integrations relying on custom-coded solutions are among the most expensive, both in terms of hard dollar and opportunity costs. Beyond the upfront costs of requirements definition, process design, gap analysis and the specification of the customization, there's the initial coding, testing and documentation and the creation of user training materials. Don't forget about the costs of maintaining the expertise required to manage the customization, even if no work is needed for a period of time.

There are potential additional maintenance and support costs. For example, vendor-supplied error fixes that need to be reverse-engineered into the customized code or when (per the vendor support agreement) an error needs to be reproduced in a separate copy of the application *without* the customizations *before* an issue will be addressed.

### **ACCURATE INFORMATION WHERE YOU WANT IT, WHEN YOU NEED IT**

The real-time bidirectional data exchange between OnBase and an insurer's claims, policy admin or ERP system ensures that staff make decisions with the most current information available, and do so without placing unrealistic expectations on the IT department, or its budget. There's no lag in communication. No more overnight batch updates. No more manual intervention.

Our integration methodology promotes end-user adoption as well, as users stay within familiar interfaces, accessing information stored in OnBase with the click of a mouse. Staff focus more on higher-value tasks. Employee satisfaction increases, but most importantly, efficiency and customer service improve – essential to driving profitability.

A true enterprise solution, OnBase is a flexible, scalable content management system. OnBase provides a way to not only strategically optimize your existing core business systems, but also other applications used in departments across your institution.

Insurance IT departments face enough challenges. Integrating systems and applications with an ECM solution should be seamless and effective, simplifying processes and improving users' ability to access information without overextending IT resources. OnBase allows IT to complete in a matter of hours what could take weeks or months to accomplish with another ECM product. And, because our integration tool requires no custom coding, upgrades with OnBase don't require huge investments of time or service costs.

Your technology needs will change. Your organization will evolve. Tailored for departments but comprehensive for the enterprise, OnBase is a true ECM solution, designed to give you what you need today and grow with you over time, extending the value of your core business solutions.

For more information, visit [Hyland.com/Insurance](https://www.hyland.com/insurance)