

Customer Success Story | Technology

Hyland

OnBase and Workday integration speeds processing, streamlines AP operations

The Challenge

At Hyland, managing financial operations was cumbersome. The technology provider accumulated several financial management systems over time, with each addressing a different problem or area within accounting and operations. This cluster of system silos required extra management effort and additional training, and forced end users to switch between multiple applications.

One of the areas most affected by these system silos was accounts payable. To centralize the payables process and consolidate financial systems, Hyland implemented Workday Financial Management. Working in conjunction with OnBase, Hyland's enterprise information platform, the two could be leveraged together for improved content management as well as creating an environment where the systems could interact and share information with one another.

The Solution

Prior to implementing Workday, Hyland's purchase order request process was complicated. Employees found the submission of the detailed electronic request forms in OnBase to be difficult to use. AP staff had to frequently take time out of their day to assist, fix errors and complete forms on a requestor's behalf.

Adding to these challenges, back-end processing by the AP department was unorganized as well. Staff switched back and forth between OnBase and Hyland's accounting system to process payments. The lack of an intuitive connection between the accounting system and OnBase

Hyland®

CUSTOMER

Hyland

INDUSTRY

Technology

SIZE

3,000+ employees

LOCATION

Global headquarters in Westlake, OH

ONBASE INTEGRATIONS


Workday Financial Management

DEPARTMENT USING ONBASE

Accounting

One platform **Unlimited potential**

OnBase®
by Hyland



"A lot of things were very disjointed or documented outside of our systems – now we have a lot of that automated or documented inside of Workday. It's able to link things together that previously would have been disjointed."

-Nancy Person, VP finance & accounting, Hyland

duplicated efforts and prevented an efficient process for both requestors and AP staff.

After implementing Workday, Hyland centralized its internal payables processes with a dedicated sourcing team and Workday as its end-to-end payables system. The sourcing team trains and lives in one financial management suite, while non-accounting employees fill out a much simpler sourcing request form from their familiar OnBase environment.

"People need to be able to do the jobs that they were hired for," said Lindsay Wolfe, sourcing advisor at Hyland. "If they're spending time on complicated forms, we're not using resources the way that we want to."

Because OnBase offers a variety of tools to streamline the indexing, validation and synchronization of data with Workday, staff now capture AP documents with minimal effort. By aggregating data and connecting documents to the transactions in Workday, OnBase seamlessly communicates and presents related information.

Now, regardless of how they arrive, indexing documents is expedited through communication between OnBase and Workday. OnBase retrieves data from Workday to prepopulate and validate document data during indexing, speeding up the entire process.

The relationship between Workday and OnBase yields many other benefits in terms of business continuity. For instance, vendor data is managed both in OnBase and Workday, but the connection between the systems

ensures data integrity and better visibility for end users. If an issue arises that requires additional discovery into the initial contract, OnBase provides quick access to related contracts and cases for that vendor.

Adopting Workday allowed Hyland to make a large leap forward toward consolidating its systems into standardized core corporate platforms. This was made easier through Workday's ability to connect to OnBase. In the future, Hyland plans to extend integration between OnBase and Workday to further automate the forms processing and extend reporting to gain more insight into company spending.

The Difference

Increases visibility: Integrating Workday and OnBase allowed Hyland to share content between two foundational internal systems, minimizing data silos and increasing visibility for process owners and end users.

Streamlines PO processing: Standardizing on the Workday Financial Management platform allowed sourcing staff to manage the processing of payables from PO generation to submission, resulting in a simplified request form and streamlined process.

Provides continuous communication: Data processed in OnBase can be seamlessly communicated and connected to transactions in Workday, saving time and manual effort as well as shortening the pay cycle.

Learn more at [OnBase.com](https://www.onbase.com) »