

OnBase

a Hyland Software solution

PRODUCT DATA

Outlook® Integration

What It Is

The OnBase Microsoft Outlook® Integration enables a Microsoft Outlook user to view documents and store e-mail messages and attachments in the OnBase document management system through the familiar Outlook interface.

How It Works

By opening the OnBase folder in Outlook, users instantly can retrieve documents from the OnBase repository inside the Outlook interface.

E-mails and/or attachments can be imported by simply dragging the e-mail to a pre-configured OnBase Outlook folder. A user might set up a folder for Purchase Orders, one for Invoices, another for Resumes, etc. The folders can automatically index the documents or present the user with the OnBase Import dialogue box for indexing. Archived documents immediately are available for OnBase users to view and can be configured to participate in OnBase Workflow. A copy of the archived document can be configured to be available in Outlook.

Who Will Benefit

Organizations in manufacturing, insurance, financial services, healthcare, distribution and many other industries can benefit from using OnBase in conjunction with the familiar Microsoft Outlook interface. E-mail and attachments can be quickly and conveniently archived. Not only will the e-mail documents be available immediately to other OnBase users, but the documents also can be incorporated into Workflow activities for action and follow up.

Technical Features

- Configurable OnBase import folders.
- Automatic Document Type selection and indexing.
- Documents archived into OnBase and still available in Outlook.

Business Benefits

- Familiar interface, reduced training costs
- Puts indexing in the hands of those most familiar with documents
- E-mail and attachments immediately available in the enterprise
- Documents can initiate or participate in OnBase Workflow

System Requirements

- Microsoft Outlook 2000 or better
- OnBase Outlook Integration License
- OnBase Client License
- OnBase Core Services 4.3.6.4
- Supported SQL Database (SQL Server 7/2000, Oracle 8+, Sybase SQL Server 11.5, Sybase SQL Anywhere 5.5.04/7.0.1)

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