ONBASE

DOCUMENT TRANSFER

SUMMARY

Document Transfer changes the way related organizations share information, allowing OnBase data and content to be shared and/or replicated between two (or more) independent OnBase systems. Packages of OnBase metadata and documents are transmitted from the sender to the receiver based on a defined schema, without changing the Document Types or Keyword Types used to classify the documents in either system. Document Transfer facilitates the movement of documents between multiple OnBase systems, allowing users to interact with information across distributed organizational structures and geographies.

BENEFITS

- **Facilitate sharing of documents,** regardless of organizational structure or geography
- **Maintain unique naming conventions,** for Document Types and Keyword Types, when replicating data between systems
- **Remove version dependence** between OnBase systems participating in data replication
- **Eliminate costs and delays** associated with printing, transporting and scanning duplicate documents when they already exist electronically in various OnBase instances
- **Reduce labor required to search, collect and provide documents** across scattered or dispersed organizations or instances

DESIGN
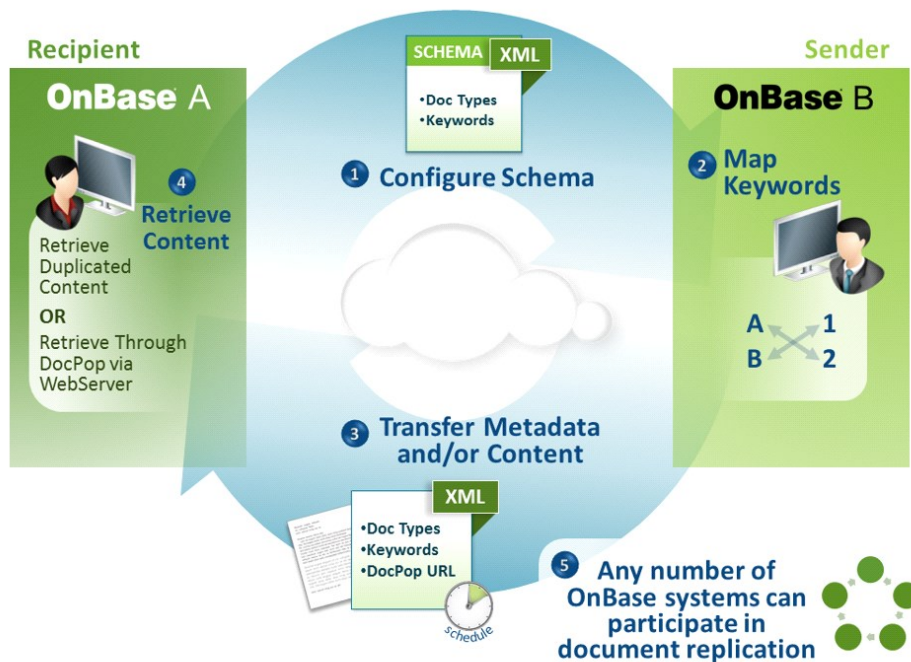
1. The recipient configures and publishes a schema defining Document Types and Keywords Types in which to receive documents.
2. The sender subscribes to the published schema and maps the Document Types and Keyword Types between the two

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OnBase instances.

3. Updates are prepared, the metadata and/or content are replicated to the recipient, and the documents are classified and indexed. These three processes are scheduled to occur regularly, so changes to the sender's documents and metadata are reflected in the recipient's OnBase system.

4. The duplicated documents can be retrieved by the recipient or, if only metadata was replicated, through a DocPop connection with the sender's repository.

5. Document Transfer enables many-to-many relationships so that any number of OnBase systems can participate in document replication.

APPLICATIONS

- **State and local governments:** State courts and other governmental agencies can coordinate document transfers with their local county and district agencies to more easily facilitate the exchange of information between these separately managed entities. In addition to reducing the costs associated with the storage and manual transfer of paper documents, Document Transfer also simplifies and standardizes constituent demand for and access to documents.
- **Subsidiaries/regional offices/outsourced facilities:** Organizations that operate independently, but that may need to share OnBase documents with headquarters or other divisions often print and dispatch documents to central offices. HQ must then scan those documents into their OnBase instance in order to maintain duplicate copies. Document Transfer allows subsidiaries or regional office to automatically replicate critical data with their central office, eliminating the time and cost of manual duplication.

KEY FEATURES

- **Replicate OnBase metadata and documents or just metadata** between two (or more) OnBase systems without changing existing Document Type or Keyword Type naming conventions
- **Automatically update document changes,** such as page re-ordering, revisions, and keyword modifications
- **Schedule automatic data replication** for desired frequency and management of network bandwidth
- **Optional virtual replication** to house replicated metadata only, and ease consumption of network and system resources
- **Transfer documents ad hoc,** to accommodate replication on an as-needed basis

INTERFACE
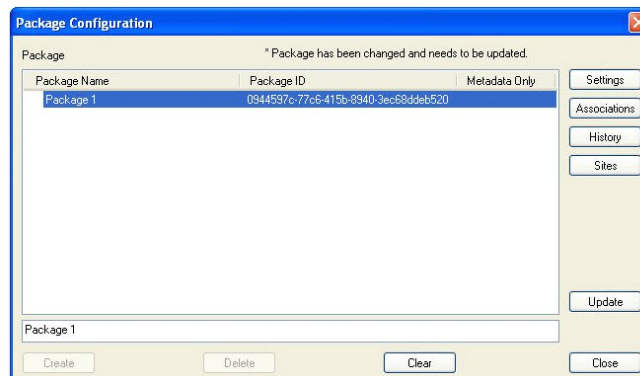
Configuration Screen to Receive Data Packages Based on Configured Schema
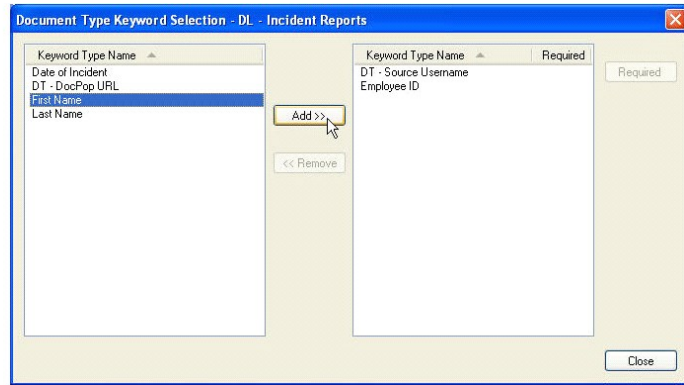
Mapping Document Types Between OnBase Systems

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