

# WorkView Integration for Microsoft Outlook

## Summary

WorkView Integration for Microsoft Outlook (Foundation EP1) extends the accessibility and value of OnBase WorkView—users never have to leave Outlook to find the WorkView data they need. OnBase automatically maps e-mails to WorkView data, so when users need information related to an e-mail, they simply click a button in Outlook. Users can also create new WorkView objects, execute filters and perform full-text searches right from Outlook. It all saves time, speeds processes and improves service. And since users find everything they need from their familiar e-mail program, training costs drop even as OnBase adoption rates rise.

## Benefits

- **Easy access to WorkView data and functionality** from within Microsoft Outlook.
- **Reduce business process cycle times** by giving users access to WorkView functionality within their familiar mail client.
- **Increase worker productivity**, reducing the need to search for information across multiple data sources.
- **Reduce search time** through predefined queries and full-text search available directly from Outlook.
- **Eliminate data silos and storage redundancies** by centrally managing all communications throughout the enterprise.

## Design



By making WorkView filters, objects and data available from Outlook, WorkView Integration for Microsoft Outlook 2010 simplifies access to the data employees need to do their jobs. From the Outlook Inbox or an individual e-mail message, users can view related information about e-mail senders, recipients and other e-mail properties. They can also create new WorkView objects, execute WorkView filters and perform full-text searches on WorkView data directly from Microsoft Outlook.

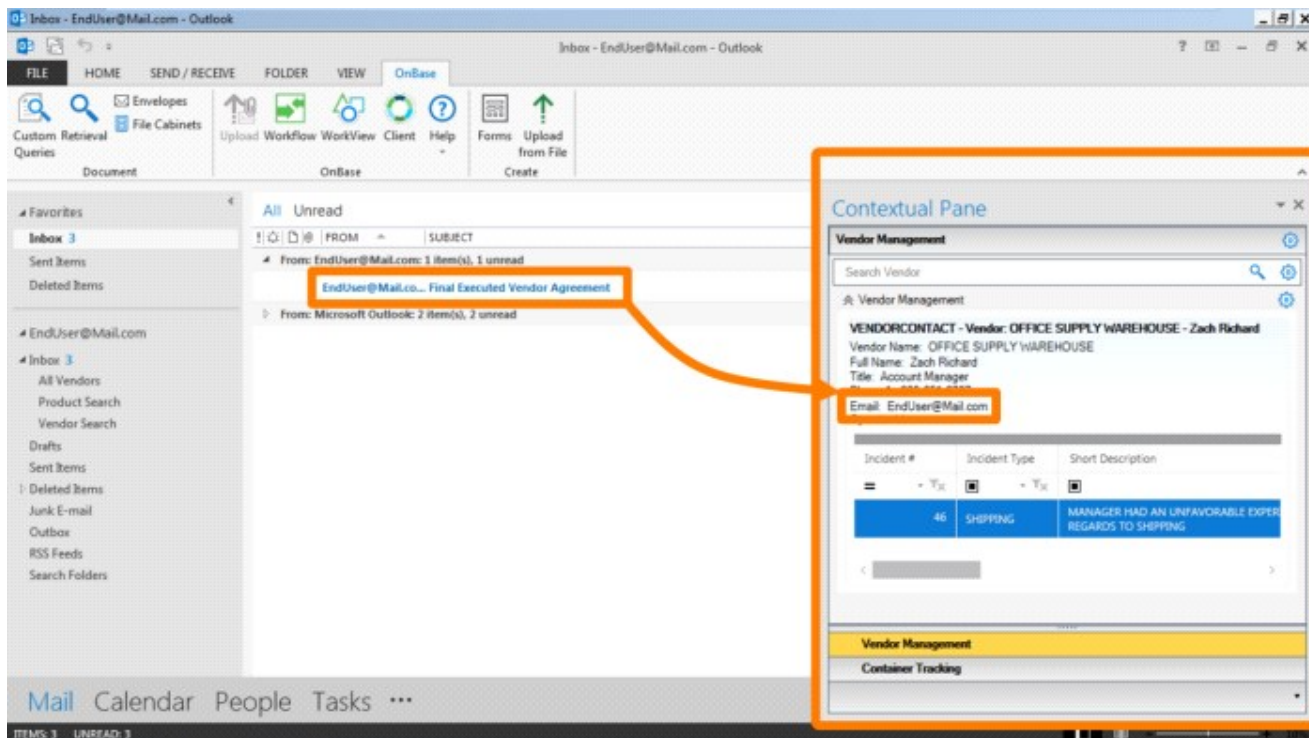
## Applications

- **Customer Relationship Management (CRM):** As they communicate with existing customers and prospects, sales employees can simultaneously monitor WorkView opportunity tracking, sales activities and lead management in Outlook. CRM data stored as part of a configured WorkView application is available to the salesperson alongside their e-mail correspondence.
- **Accounting (AP/AR):** Payables and receivables staff can more easily manage vendor and customer relationships with better access and visibility to transaction data. When employees receive e-mails regarding an account or transaction, they can easily view contact details, outstanding payables or disputed invoices without ever leaving their familiar Outlook environment.
- **Help Desk:** Help desk and support representatives can easily view support issue details, status and related requests right from a related e-mail in Outlook. As they receive incoming mail messages from their customers, support representatives can quickly and easily view details about each customer and their open issues or support history, allowing them to more efficiently close the support ticket and deliver exceptional customer service.

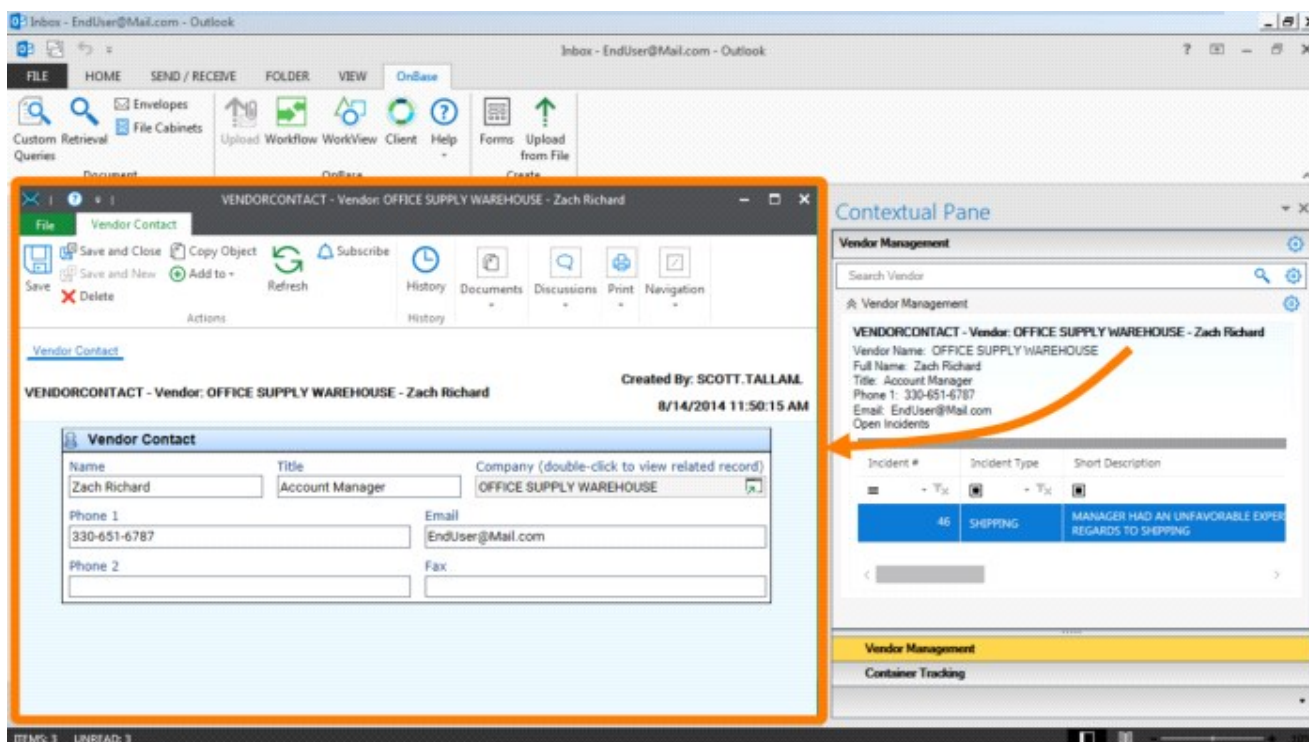
## Key Features

- **Create Outlook folders for WorkView** to display a results list, or a means of searching for WorkView data.
- **View and access documents** stored in OnBase that are related to the mail sender (and other properties).
- **Attach e-mail messages and attachments** directly to a WorkView object with keyword property mapping.
- **Synchronize Outlook Contacts with WorkView data** to resolve value conflicts or create a new WorkView object.
- **Deploy via ClickOnce technology** to facilitate easy rollout to thousands of users—even remote sites.
- **Built on the OnBase Unity Platform** providing a familiar user experience.

# Interface



*The WorkView Contextual Pane automatically displays related WorkView application data based on mapping to the sender's email address in Outlook.*



*Create new and view existing WorkView application data records directly from Outlook.*

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