

# ONBASE

## INTEGRATION FOR MICROSOFT OUTLOOK

### SUMMARY

Integration for Microsoft Outlook allows an Outlook user to interact with OnBase content and processes through their familiar Outlook interface. This integration provides users with multiple methods for importing emails and any associated attachments as documents, including drag-and-drop to an Outlook folder with automatic indexing using mail message field mappings. Users can also retrieve OnBase documents directly through Outlook, increasing adoption and reducing training costs.

### BENEFITS

- **Contextually link emails to business process transactions** via Workflow, folders and cross-referencing.
- **Eliminate email data silos and storage redundancies** by centrally managing all communications in the enterprise.
- **Reduce business process cycle times** by capturing emails and attachments as they are received.
- **Automate import and index of emails and attachments**, increasing accuracy, consistency and efficiency.
- **Access emails and attachments from OnBase, regardless of interface**, with user-based permissions and security.

### DESIGN



Integration for Microsoft Outlook connects email to the business process transaction and eliminates storage redundancies. A single copy of an email and attachment is managed in OnBase and immediately made available to any OnBase user, regardless of their primary interface. In addition, from the familiar Outlook interface, users are able to interact directly with Document Retrieval and Workflow, providing access to standard OnBase functionality, as needed by the user. Using ClickOnce (or MSI) technology, Integration for Microsoft Outlook can be easily mass deployed to thousands of users, even to remote sites.

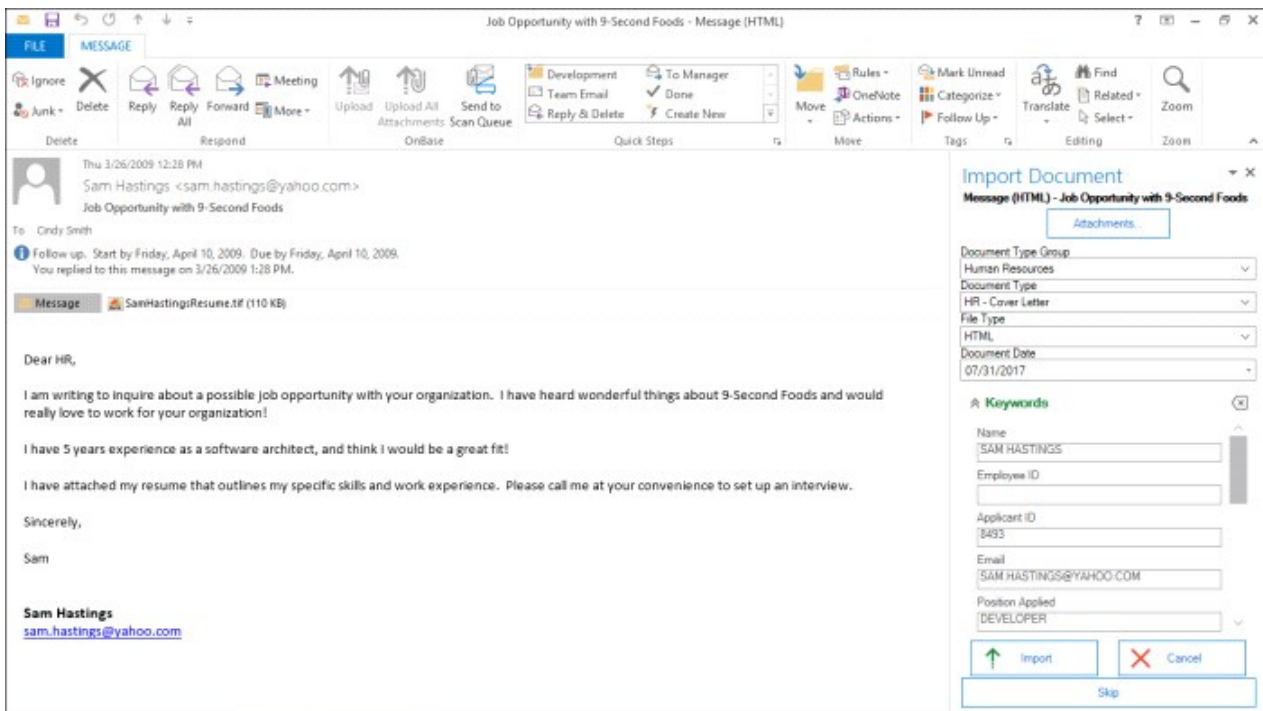
## APPLICATIONS

- **End-Users** have a need to store and work with e-mails and attachments in the context of a business process, while remaining within the Outlook environment.
- **E-mail Administrators** have a need to reduce the number of redundant e-mails in Microsoft Outlook (Exchange), eliminate .pst files and public folders; improving performance and reducing storage costs.
- **Records Managers** have a need to manage e-mails and attachments as records, with the ability to apply disposition and retention policies, just as they would manage any other business document

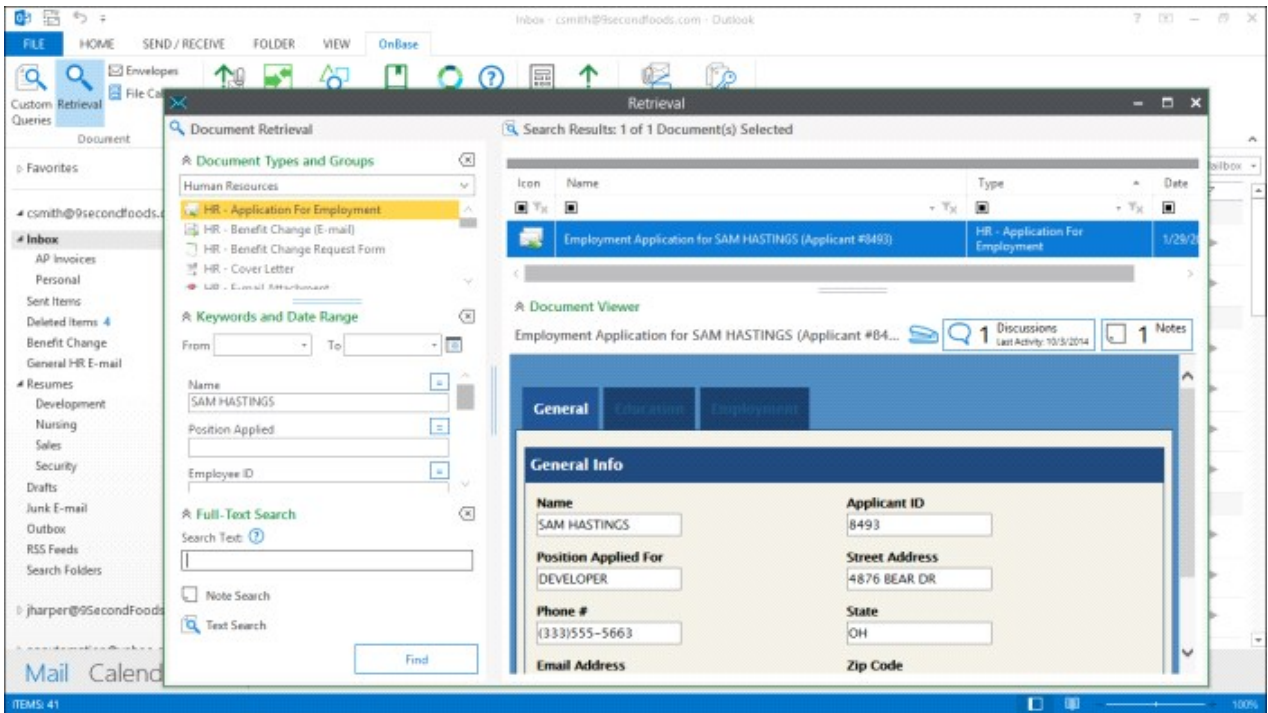
## KEY FEATURES

- **Upload email and attachments** into OnBase as documents, with upload preview, while automating the index process.
- **Automatic Document Type and keyword assignment** using MAIL, Static and Mapped Keyword values.
- **Retrieve documents** stored in OnBase via the Outlook interface—combining date, keyword and full-text search.
- **Integrated Workflow** provides ad-hoc tasks, user interaction and related items from the notification (message) ribbon.
- **Attach OnBase documents** to email messages directly from the message ribbon.

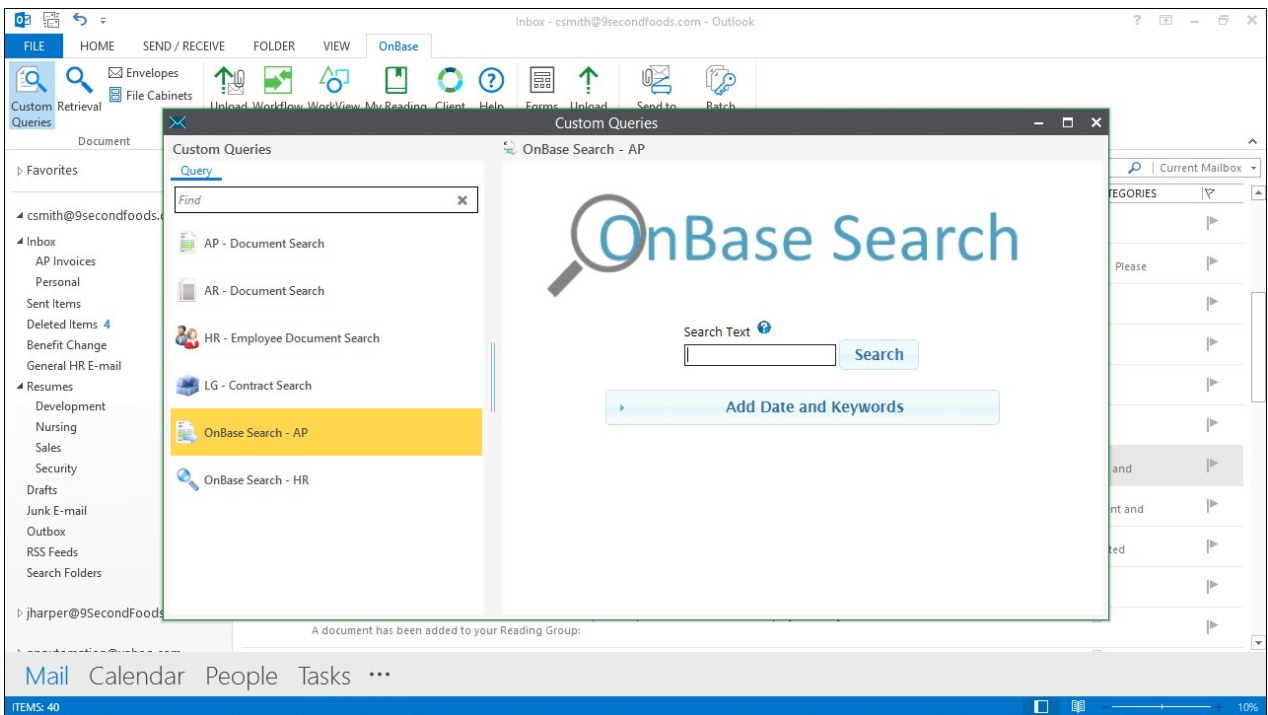
## INTERFACE



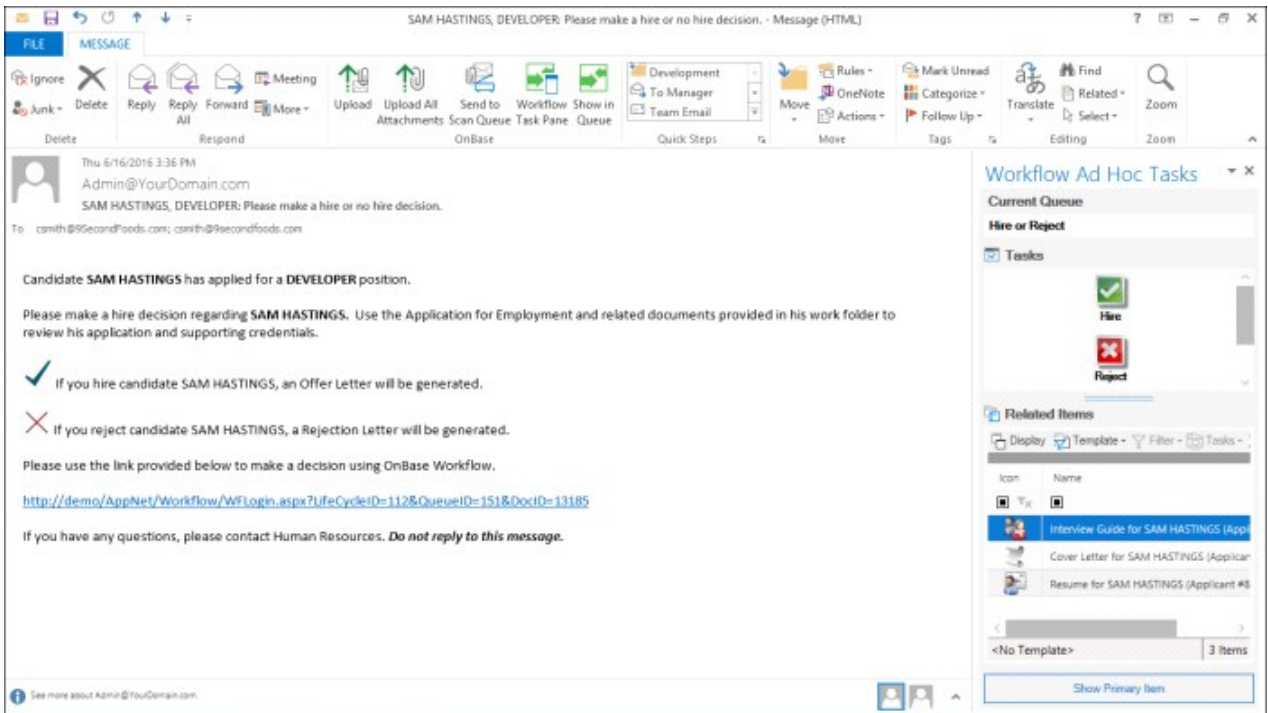
Import email and attachments into OnBase via "Import" button or drag/drop to an Outlook folder with automatic document classification and keyword indexing



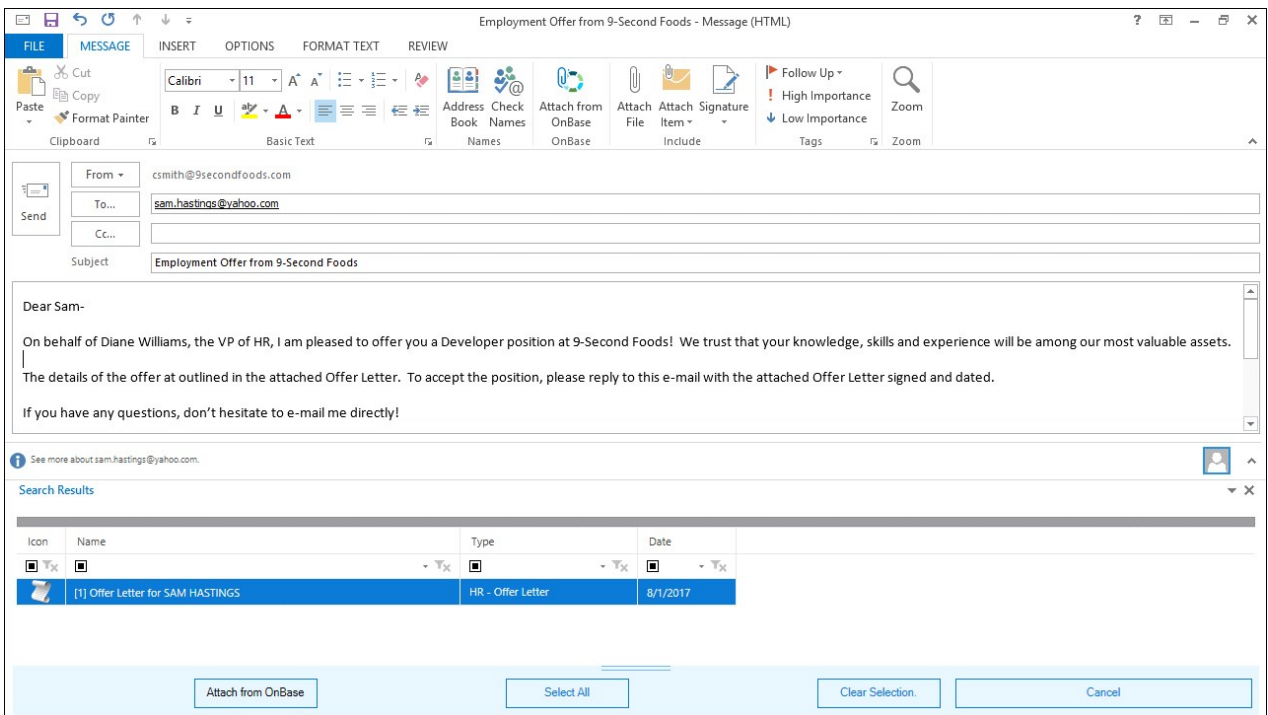
Document Retrieval (Search) with embedded Document Viewer



OnBase (full-text) Search via Outlook interface

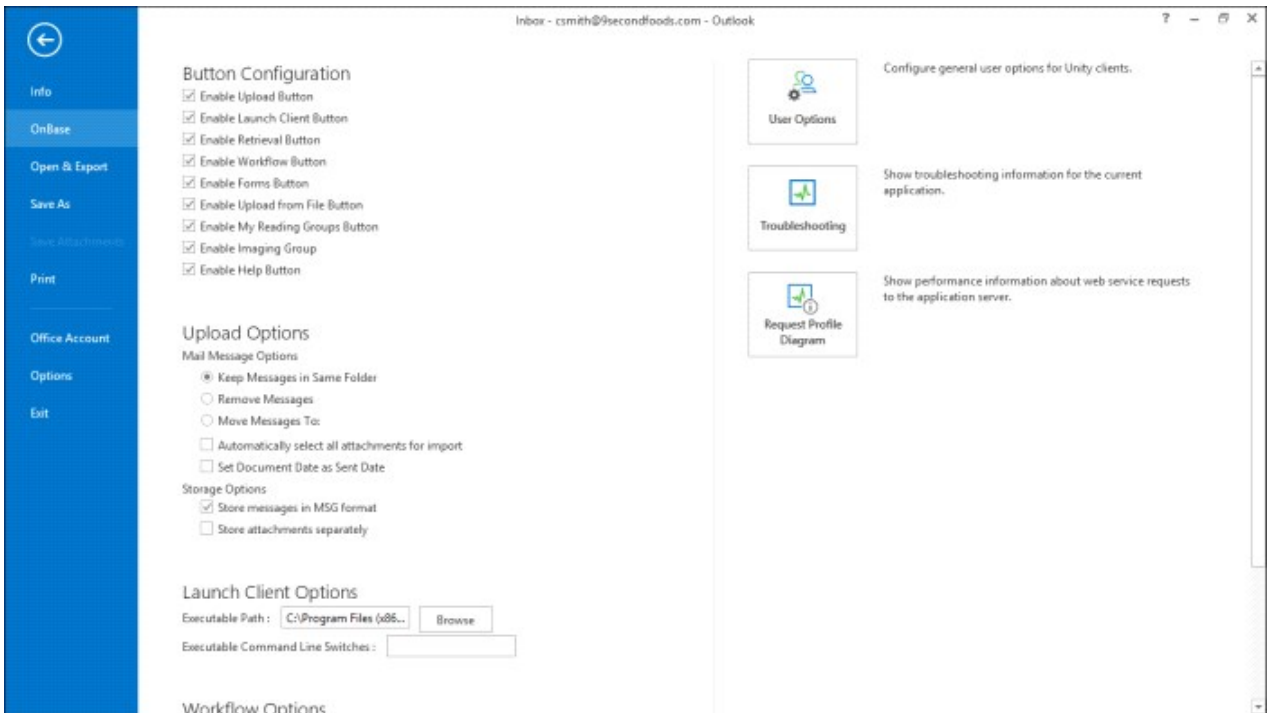


Execute Workflow Ad Hoc Tasks and view Related Items from email notification



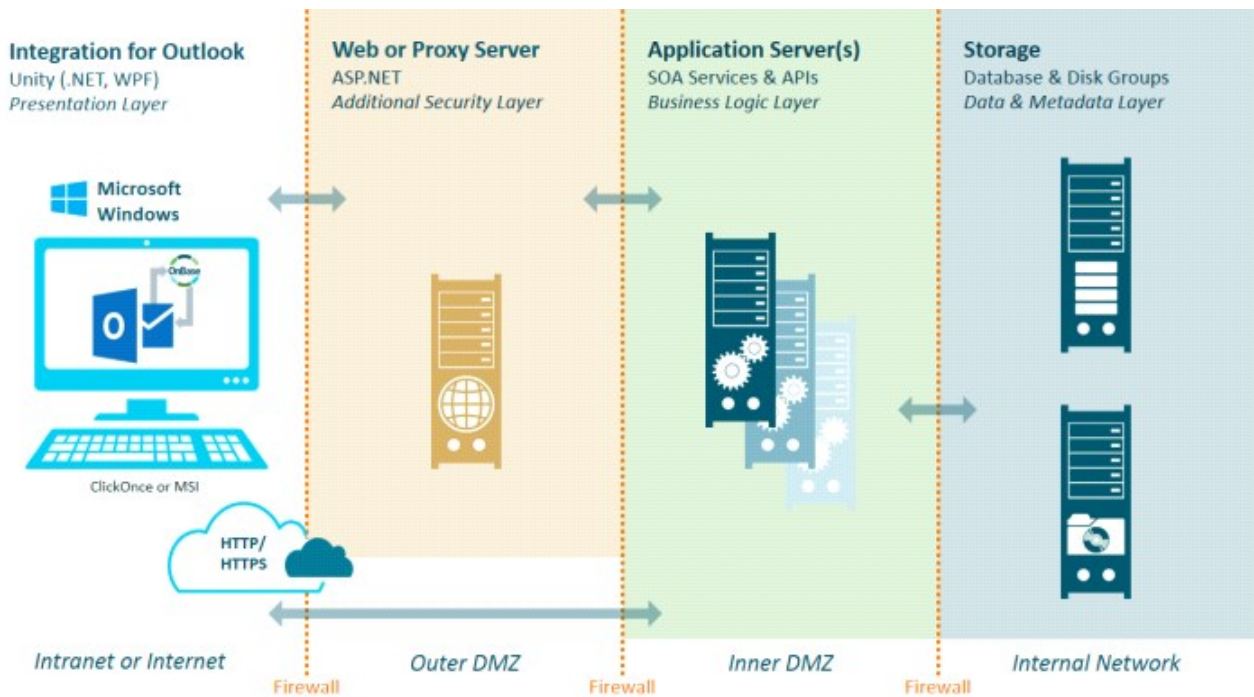
Attach an OnBase document directly to an Outlook email message





OnBase Configuration, Upload and User Options from Outlook | File menu

## ARCHITECTURE



Integration for Microsoft Outlook is a Windows-based desktop application that stores interface components on the client machine, but ClickOnce (or MSI) technology enables rapid installation to user workstations. Regardless of whether the solution is on-premise or hosted, the integration can be quickly deployed over a WAN across an internal network, or via the Internet using HTTPS over a firewall.

**Microsoft Outlook** connects via HTTP or HTTPS to the **OnBase Application Server** (Core Services) where connections are made to the **OnBase Database** and **Disk Groups** to store or retrieve content. Optionally, a Web or Proxy Server can be used for an additional layer of security.

Integration for Microsoft Outlook license and OnBase Client licenses (Concurrent, Workstation or Named) are required (a Client license is consumed via the Application Server).

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