

ONBASE

CONTENT CONNECTOR FOR MICROSOFT SHAREPOINT

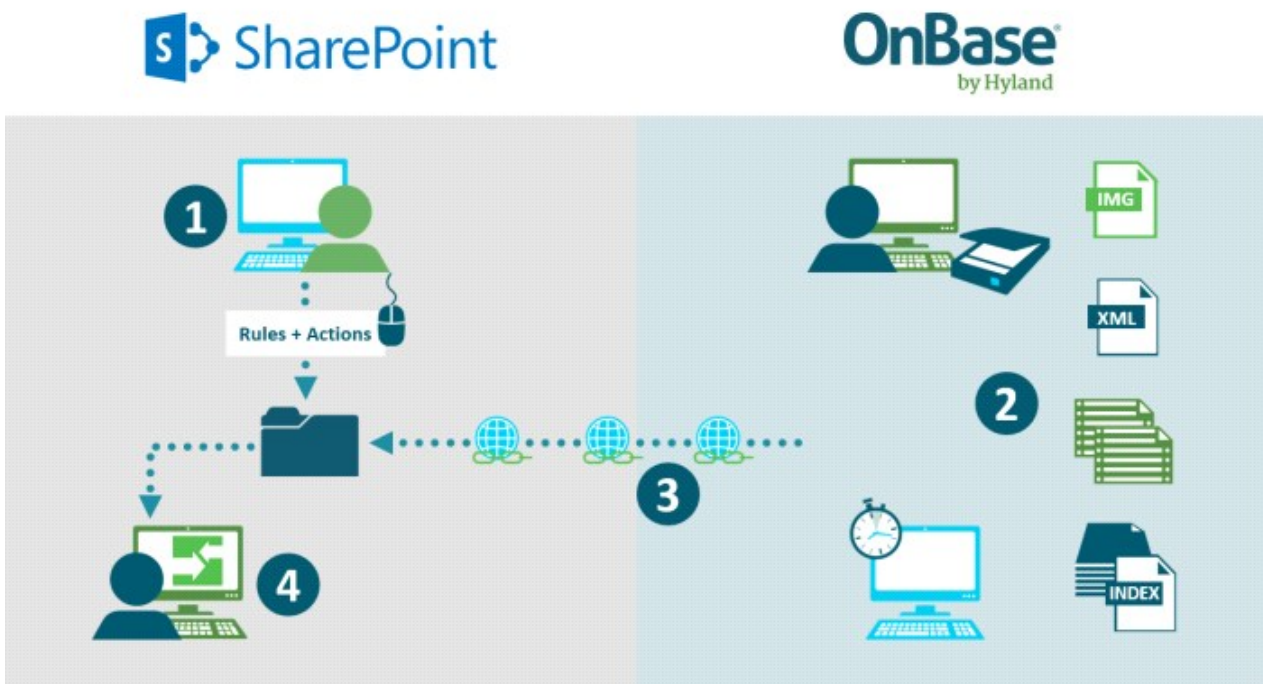
SUMMARY

The Content Connector for Microsoft SharePoint automatically links documents batch processed into OnBase to related items and records managed in SharePoint, providing users with immediate access to all of the content they need from within their familiar SharePoint environment. Based upon rules defined by a SharePoint site owner, relevant OnBase content is made accessible as item list attachments and document library items.

BENEFITS

- **Provides a high volume scanning and capture solution for SharePoint** that complement its native capabilities.
- **Leverages investments** by integrating these enterprise solutions, to take advantage of the strengths of each.
- **Promotes worker efficiency**, providing SharePoint users with self-service access to related content in OnBase.
- **Immediate, out-of-the-box solution** easily deployed without the burden or cost of custom development.
- **Easy public and remote access** to OnBase content and features through SharePoint, without costly end-user training.

DESIGN



1. In SharePoint, users can point-and-click configure rules and actions to subscribe to content batches processed into OnBase.
2. High volume batches of paper documents are scanned into OnBase and high volume batches of electronic documents are imported into OnBase via any batch-based import processors including COLD/ERM, DIP, and the XML Tag Processor.
3. OnBase automatically posts hyperlinks to relevant item lists and document libraries in SharePoint.
4. Documents are easily retrieved by SharePoint users via hyperlinks, and optionally, users can interact with Workflow.

APPLICATIONS

- **Project management and procurement:** Organizations using SharePoint to collaborate on and manage projects can now have any project-related content, batch processed in OnBase, linked to relevant document libraries and item lists managed in SharePoint. For example, based upon filtering rules, such as matching project numbers, links to purchase orders, vendor invoices and COLD financial reports can be automatically posted to items and records. This provides users with self-service access to a complete set of all project-related content regardless of where it is stored.

KEY FEATURES

- **Automatic Indexing** – SharePoint content types and column metadata are respectively mapped to OnBase document types and keywords, allowing the index values to be populated in SharePoint upon the posting of OnBase document hyperlinks.
- **Rules configuration** allows users to apply conditions to subscribe to any OnBase batch processed documents from any SharePoint item list or document library.
- **OnBase Viewer for SharePoint** provides SharePoint users access to OnBase standard toolbars and right-click menu functions, and can optionally display relevant Workflow tasks with Related Documents folders.

INTERFACE

Document Information Panel for: VENDOR INVOICE 2110 for PO 660 from OFFICE SUPPLY WAREHOUSE
Workflow Activity: AP - Invoice Approval: Payment Entry

Approve for Full Payment | Approve for Partial Payment | Deny Payment

OnBase

Back Redaction | 277547 - Arrow | 1 / 1 | Fit Width

INVOICE

OSW
Office Supply Warehouse
8879 Blue Street
Denver, CO 80002

INVOICE NO: 2110
DATE: January 7, 2012

To: 9-Second Foods, Inc.
19000 Quickly Circle
Columbia, MO 65201

Ship To: Same

Salesperson	PO Number	Date Shipped	Shipped Via	FOB Point	Terms
Bob M.	660	1/7/12	UPS		2% 10; Net 30

Quantity	Description	Unit Price	Total
500	8875966 Blue Pens (9-Seconds Food Logo)	0.39	\$ 195.00

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OnBase Viewer for Microsoft SharePoint with document information and optional Workflow panels displayed.

The screenshot displays the OnBase configuration page for 'Vendor Invoices'. At the top, the 'Document Type' is set to 'AP - Vendor Invoice'. Below this, the 'Keyword Mappings' section shows a list of OnBase Keyword Types and a list of SharePoint Column Types. The 'Invoice Amount' field in the OnBase Keyword Types list is highlighted in green, and an arrow points to it from the 'Amount' field in the SharePoint Column Types list. Other fields include PO #, Project ID, Vendor #, Vendor Name, Invoice #, Invoice Date, and Status.

Point-and-click OnBase configuration through SharePoint allows easy mapping of SharePoint Content Types and Column fields to OnBase Document Types and Keywords.

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