PRODUCT OVERVIEW

ONBASE

INTEGRATION FOR MICROSOFT SEARCH

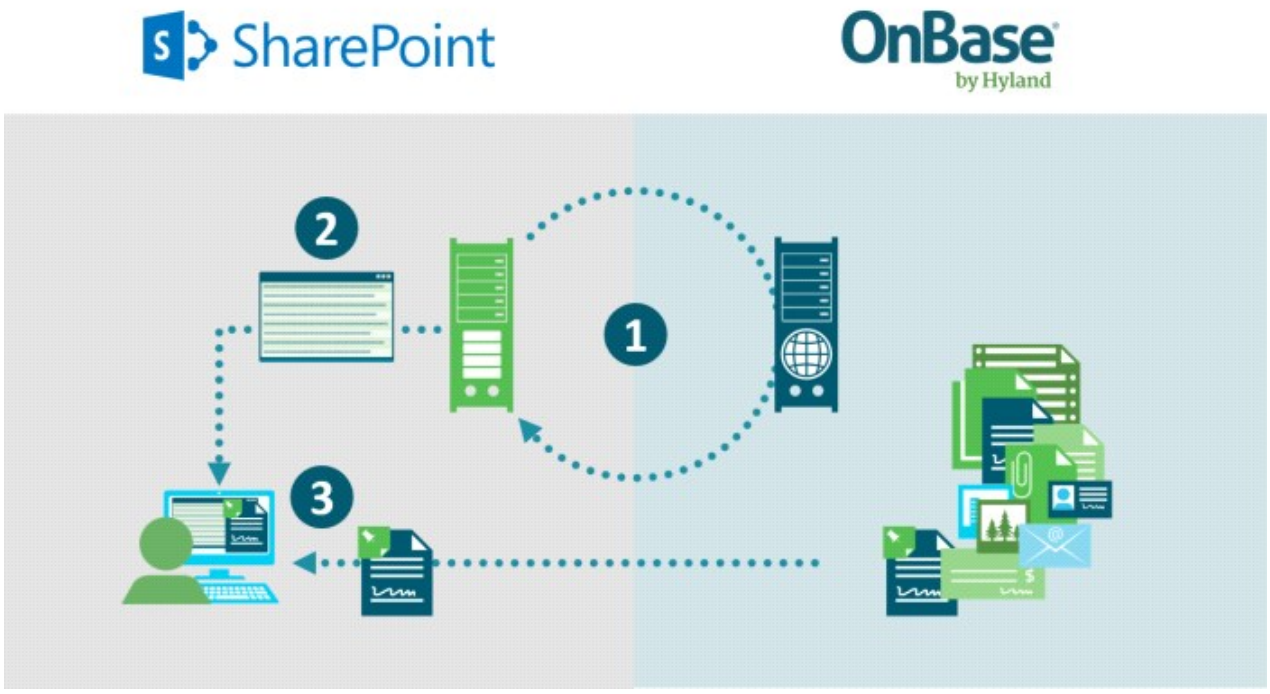
SUMMARY

The OnBase Integration for Microsoft Search enables OnBase content to be indexed and searched directly within Microsoft SharePoint Server or Microsoft Search Server products. As users perform searches, results are returned in a single relevance-ranked list, regardless of whether the documents or content resides in Microsoft SharePoint, OnBase or other enterprise repositories and sites.

BENEFITS

- **Leverages investments** by integrating these enterprise solutions, to take advantage of the strengths of each.
- **Promotes worker efficiency,** providing non-OnBase users with self-service access to OnBase documents and content.
- **Immediate, out-of-the-box solution** easily deployed without the burden or cost of custom development.
- **Public and remote access** to search OnBase content through SharePoint extranets, without costly end-user training.

DESIGN



1. Based on configured settings, the Microsoft Index Server crawls OnBase and copies keywords and full text index information for documents designated to be included in Microsoft search.
2. Users performing Microsoft enterprise searches receive a relevance ranked results list that may include content stored in OnBase, SharePoint or other third party repositories.
3. When an end user selects an OnBase document name from the search results, they are authenticated with OnBase and the requested document is displayed.

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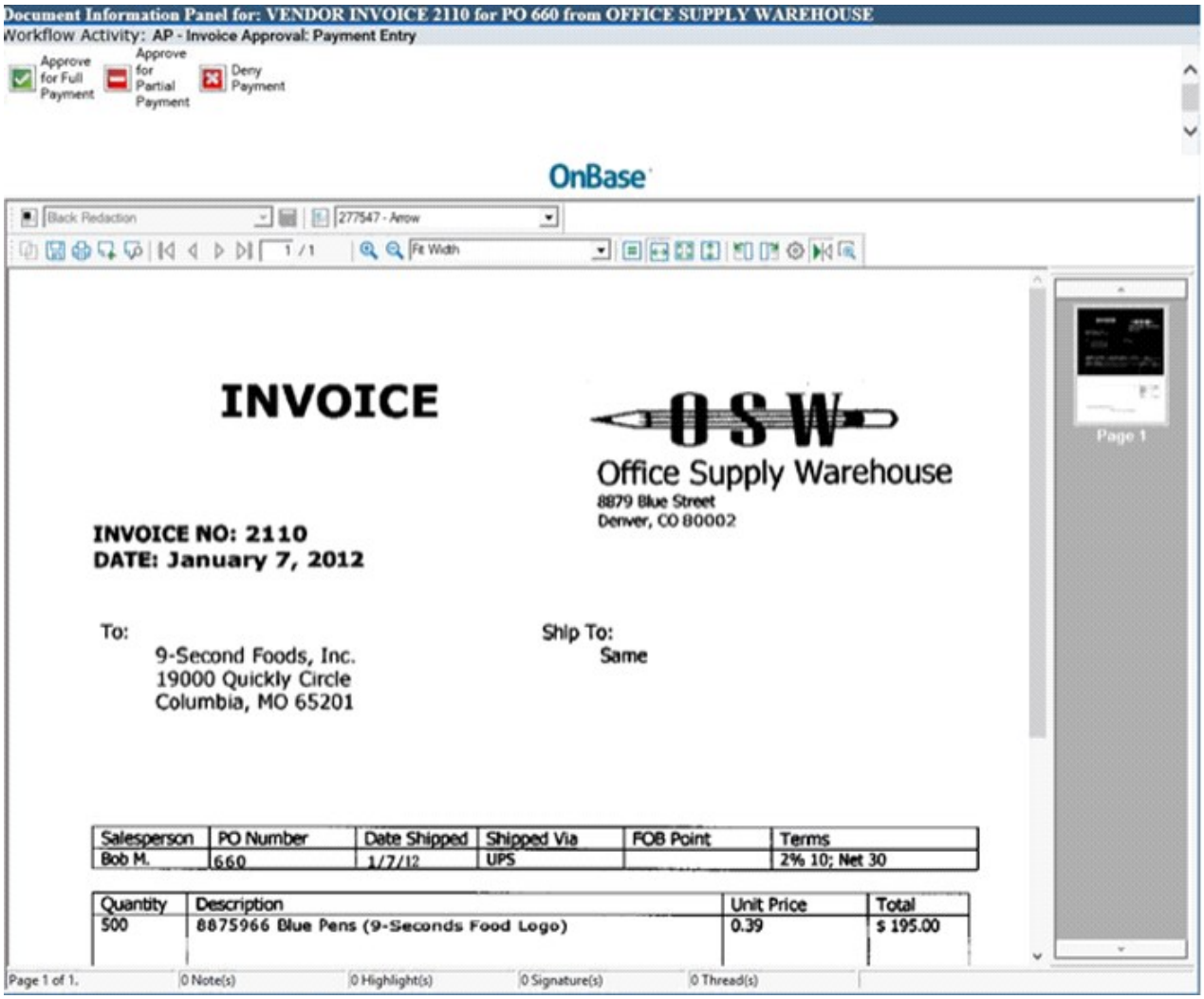
APPLICATIONS

- **Information/knowledge worker research:** Users of Microsoft Search products whose primary job responsibilities require thorough research of available information are provided with easy access to OnBase content, combined with content stored in designated Web sites, file shares and secondary repositories.
- **e-discovery:** Should the need for e-discovery arise within an organization, litigation support workers can easily locate all relevant electronic content, including OnBase content, using a single search solution, regardless of where the content is stored.

KEY FEATURES

- **Four methods of designating OnBase documents to be indexed and searched**: Workflow action, Archive Services option, Document Type and Document Type Group levels
- **Flexible search options** allow OnBase content to be searched using full text and/or keyword searches.
- **Optional Security Trimmer** can be used to restrict document names from being displayed within the search results based upon a user's OnBase account privileges.
- **OnBase Viewer for SharePoint** can be optionally used (in place of the Web Server DocPop Viewer) to provide users access to OnBase Workflow features.

INTERFACE



The OnBase Viewer for SharePoint is used to present documents stored in OnBase. Optionally, access to Workflow functionality can be activated to display Ad hoc Tasks, the Workflow Folder and current Queue.

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