

Integration for Microsoft InfoPath

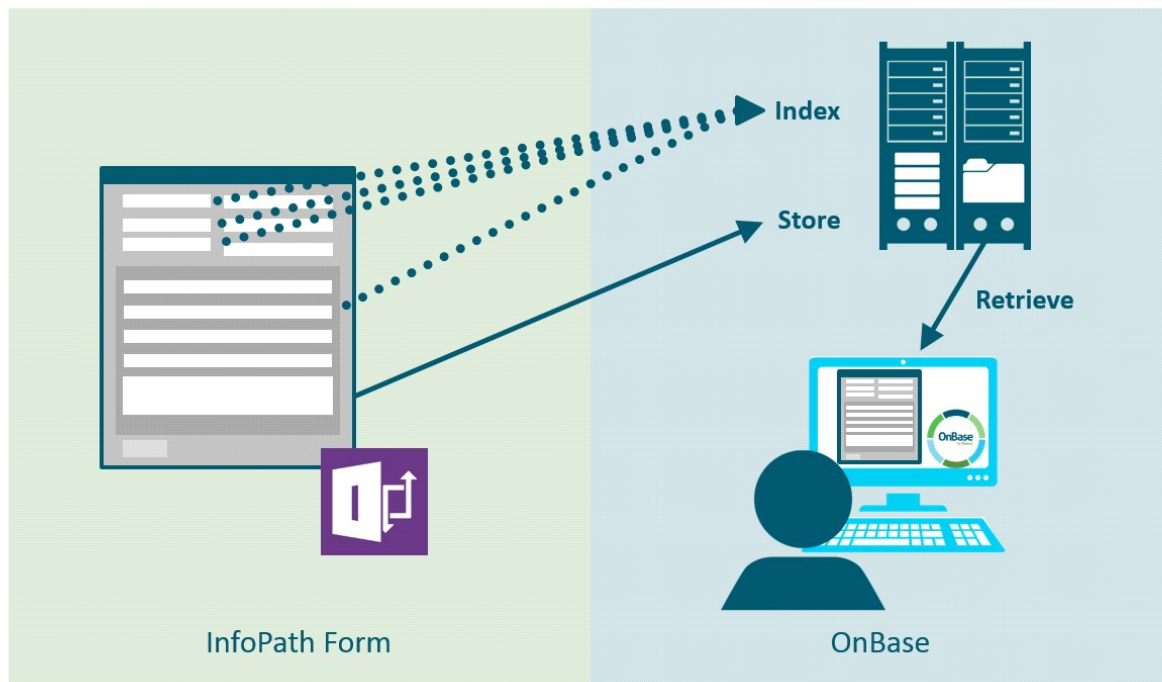
Summary

The OnBase Integration for Microsoft InfoPath saves business units time and money by increasing the productivity and value of Microsoft InfoPath forms. Employees are able to fill out InfoPath forms and submit them—fully indexed—into OnBase, where they can be processed automatically. InfoPath forms can be used to capture business-critical information and initiate business processes, where they can be routed for approval, assignment, or input from others, accelerating the process and automating manual tasks.

Benefits

- **Leverage existing investment** in forms software while adding the document management capabilities of OnBase.
- **Facilitate straight-through processing** by automating form submission and processing in OnBase.
- **Eliminate lost or compromised data** associated with managing forms in network shares and email inboxes.
- **Improve consistency and accuracy** by avoiding the re-entering of index information upon import.

Design



InfoPath forms are submitted directly into OnBase. XML data is mapped to keywords, so that forms are automatically indexed upon submission. Forms can then be managed in OnBase and routed through Workflow.

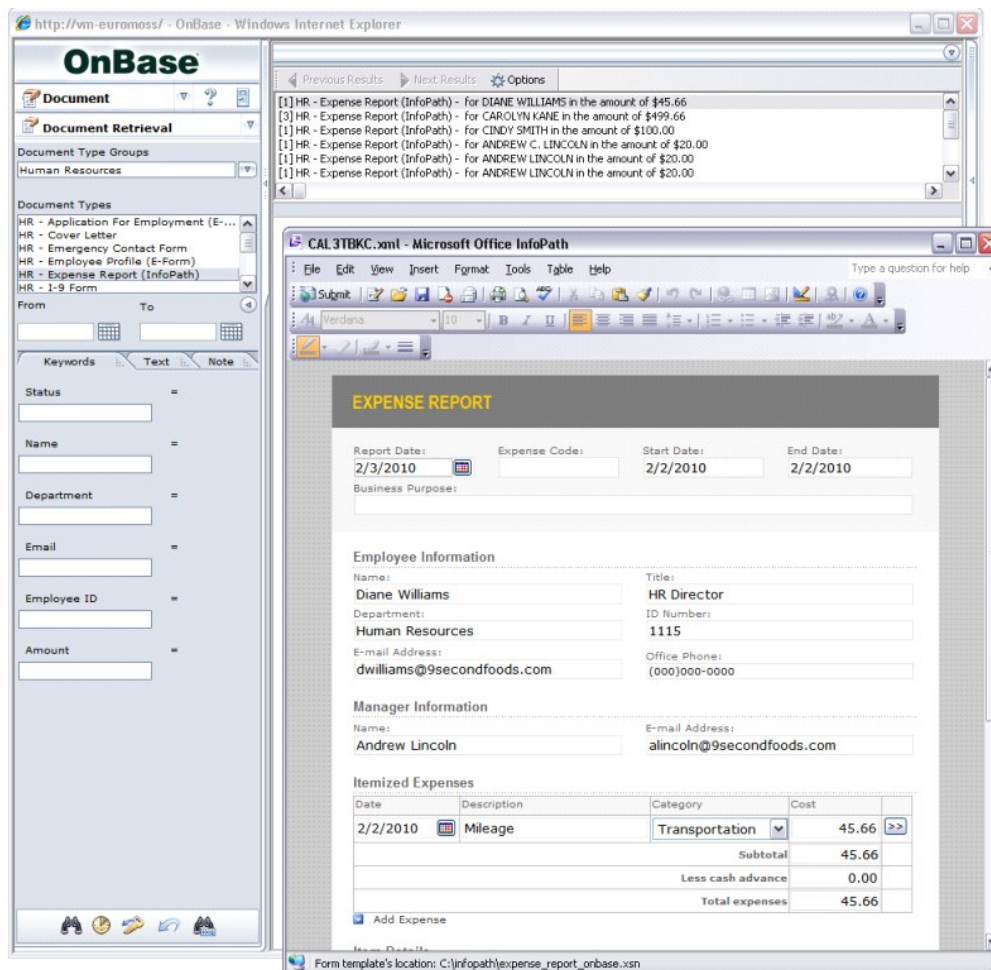
Applications

- **Any business process:** Provide forms to users in the way that makes the most sense—in an e-mail, SharePoint site or intranet site. Forms are then submitted to OnBase with a single click, and routed immediately with OnBase Workflow.
- **Human Resources:** Improve processes like job transfers, vacation time requests or performance evaluations—all processes that require multiple forms to be completed by the employee, management and HR.
- **Accounting:** Enable clerks to keep accounting cycles moving by submitting forms directly into OnBase. By eliminating manual matching tasks and automating document routing with OnBase Workflow, clerks can waste less time trying to find corresponding invoices, receipts, and other documents.

Key Features

- **Fill out InfoPath forms outside of OnBase** and submit them directly into OnBase.
- **Map InfoPath form fields to OnBase Keywords** to enable automatic indexing of the form upon submission.
- **Manage InfoPath forms as a part of a complete business process**, utilizing OnBase Workflow.
- **Submit forms to OnBase and to a secondary data source**, allowing submission of data to a legacy system in addition to managing forms in OnBase.
- **Connect to multiple data sources** to populate values on the form.

Interface



The screenshot displays the OnBase web client interface in a browser window. On the left, the 'Document Retrieval' section shows a list of document types under 'Human Resources', including 'HR - Expense Report (InfoPath)'. The main content area shows a list of retrieved documents, with the first one being an 'HR - Expense Report (InfoPath) - for DIANE WILLIAMS in the amount of \$45.66'. Below this, an InfoPath form titled 'EXPENSE REPORT' is rendered. The form includes fields for 'Report Date' (2/3/2010), 'Expense Code', 'Start Date' (2/2/2010), and 'End Date' (2/2/2010). It also has sections for 'Employee Information' (Name: Diane Williams, Title: HR Director, Department: Human Resources, ID Number: 1115) and 'Manager Information' (Name: Andrew Lincoln, E-mail Address: alincoln@9secondfoods.com). A table titled 'Itemized Expenses' shows a single entry for 'Mileage' on 2/2/2010, categorized as 'Transportation' with a cost of 45.66. The table also shows a subtotal of 45.66, less cash advance of 0.00, and a total expense of 45.66.

An InfoPath form rendered from within the OnBase Web Client

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