

Integration for Microsoft Outlook®

What It Is

The OnBase Integration for Microsoft Outlook enables a Microsoft Outlook user to store e-mail messages and attachments, view documents, attach a document to an e-mail, access Workflow and access the Explorer Extensions within the OnBase document management system through the familiar Outlook interface.

How It Works

By selecting the OnBase folder in Outlook, users can instantly retrieve documents from the OnBase repository inside the Outlook interface. From the Outlook Integration toolbar, users are presented with the OnBase Workflow and Explorer Extensions. The Workflow interface contains a list of work items waiting for user processing, while the Explorer Extensions provides a convenient way of retrieving OnBase documents through a folder structure.

E-mails and/or attachments can be imported by simply dragging the e-mail to a pre-configured OnBase Outlook folder. A user might set up a folder for purchase orders, one for invoices, another for resumes, another for customer correspondence, etc. The folders can automatically index the documents or present the user with the OnBase import dialogue box for indexing. In addition, OnBase can automatically add index information from the e-mail's metadata such as to, from, subject, date, attachment count, attachment name and message ID.

Archived documents are immediately available for OnBase users to view and can be configured to integrate with OnBase Workflow and E-Forms. Instead of saving sent or received e-mail locally or in Outlook, users can save copies in OnBase. A copy of the archived document can be configured to remain available in Outlook. Archived e-mail documents can be stored in the native MSG format, plain text, rich text or HTML. The attachments are stored natively inside the MSG file or in their native format in OnBase.

Who Will Benefit

Organizations that use Microsoft Outlook as their mail system can use OnBase in conjunction with the familiar Outlook interface. E-mail and attachments can be quickly and conveniently archived. Not only will the e-mail documents be available immediately to other OnBase users, the documents can also be incorporated into Workflow activities for action and follow-up. The OnBase Workflow interface creates a smooth segue from e-mail processing to Workflow processing.

Technical Features

- Configurable OnBase import folders
- Automatic Document Type selection and keyword indexing
- Documents archived into OnBase are still available in Outlook
- E-mail can be saved with embedded attachment or as two separate documents
- E-mail stored in native Outlook MSG format, plain text, rich text or HTML
- Attachments stored in native format
- OnBase Workflow interface available
- OnBase Explorer Extensions available
- Access to documents stored in OnBase document management system

Business Benefits

- Familiar interface reduces training costs
- Puts indexing in the hands of those most familiar with documents
- E-mail and attachments immediately available in the enterprise
- Documents can initiate or participate in OnBase Workflow
- Eliminates e-mail redundancies
- Manage e-mail as part of a business process
- Speeds up document indexing
- Feeds the OnBase system with work faster

System Requirements

- Microsoft Outlook 2000 or greater
- Integration for Microsoft Outlook license
- Workflow license, if support for Workflow is desired
- OnBase Client license
- OnBase Core Services
- Supported SQL database