

## SUMMARY

Integration for Microsoft Outlook 2007 (10.0) allows an Outlook user to interact with OnBase content and Workflow processes through their familiar Outlook interface. This integration provides users with multiple methods for importing e-mails 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.

## KEY BENEFITS

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

## BUSINESS APPLICATION

- **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.
- **Managers** have a need to increase end-user productivity by reducing the amount of time spent managing e-mail and application “switching” to retrieve OnBase content.
- **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.
- **High-Turnover Departments**, such as customer service centers, can avoid losing all historical customer e-mail correspondence that often is the result of staff changes or separated employees.

## DESIGN



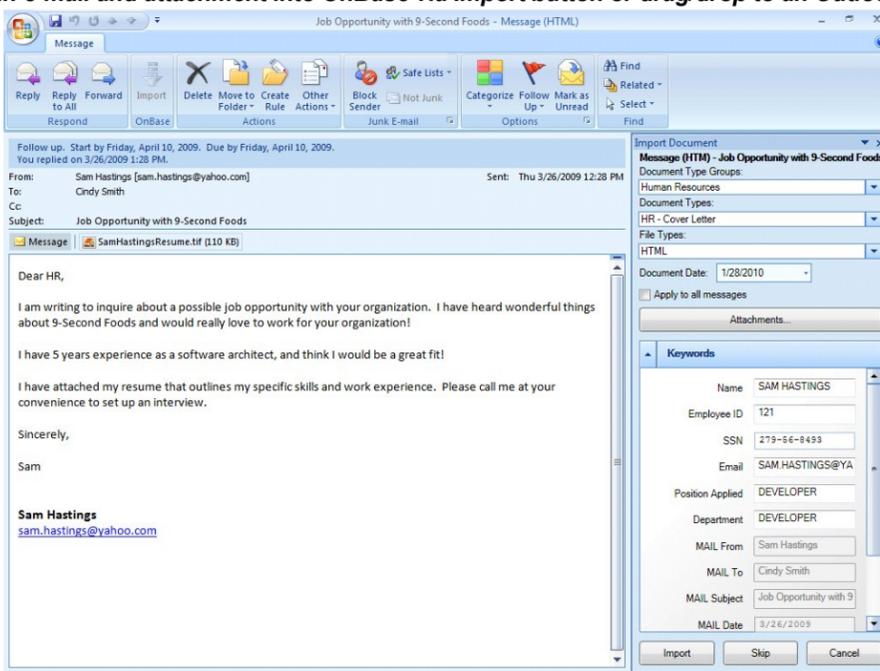
Integration for Microsoft Outlook connects e-mail to the business process transaction and eliminates storage redundancies. A single copy of an e-mail and attachment is managed in OnBase and immediately made available to any OnBase user, regardless of their primary interface. In addition, from the familiar Microsoft Outlook interface, users are able to interact directly with OnBase Document Retrieval and Workflow functionality, providing limited access to OnBase, as needed by the user. Using ClickOnce (or MSI) technology, Integration for Microsoft Outlook 2007 can be easily mass deployed to thousands of users, even to remote sites.

## KEY FEATURES

- **Import e-mail and attachments** into OnBase as documents, with upload preview, while automating the index process.
- **Retrieve Documents** stored in OnBase directly via the Outlook interface.
- **Launch Workflow** directly via the Outlook interface.
- **Integrated Workflow Experience** provides ad-hoc tasks and related documents right from the notification (message) ribbon.
- **Automatic Document Type and keyword assignment** using MAIL, Static and Mapped Keyword values.
- **Store e-mail in a variety of formats**, including native Microsoft Outlook MSG, Plain Text, Rich Text or HTML.
- **Store attachments in native format**, uniquely cross-referenced to the e-mail message.
- **Message Handling Options** provide the ability to leave e-mail message in Outlook or delete it upon import into OnBase.

## SCREENSHOTS

**Import an e-mail and attachment into OnBase via Import button or drag/drop to an Outlook folder.**



**Execute Workflow tasks and view related documents directly via Workflow notification (message).**

