

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.

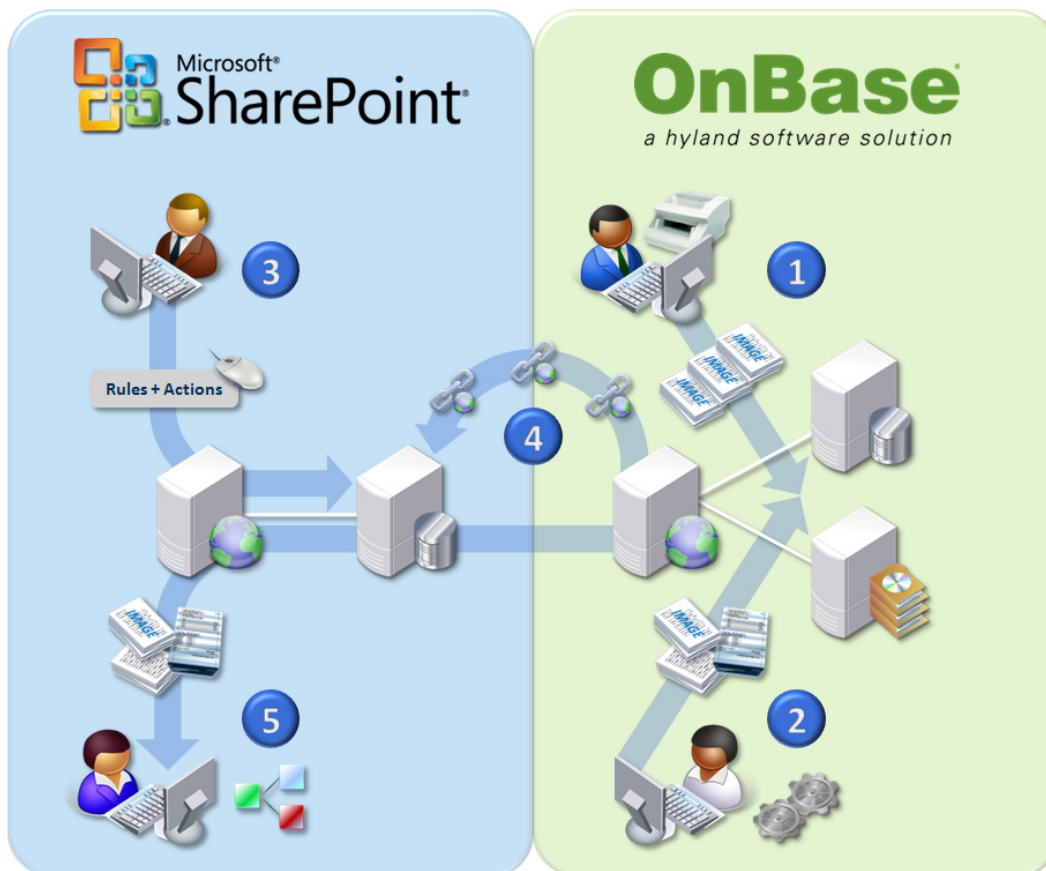
KEY BENEFITS

- **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 instant, 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 functionality through SharePoint, without costly end-user training.

BUSINESS APPLICATION

- **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.

DESIGN



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

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

The screenshot displays the OnBase Viewer interface for a document titled "HR - Resume for ANDREW LINCOLN". The interface is divided into several sections:

- Document Information Panel:** Shows the document name and current workflow queue: "HR - (1) Application Review: HR Review".
- Workflow Task Panel:** Contains icons for "Send to Skill Testing", "Send to Hiring Manager", and "No Match\Skill Set".
- Related Documents:** Lists related documents such as "Cover Letter for ANDREW LINCOLN (762-14-1968)", "Interview Form for ANDREW LINCOLN Position Applied - SECURITY GUARD", and "HR - Offer Letter for ANDREW LINCOLN".
- Document Content:** Displays the resume content, including contact information for Andrew Lincoln (555 MAIN STREET, MY CITY, MO 66666, (660) 555-1219) and a "CAREER OBJECTIVE" section.

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

The screenshot shows the "Content Type Mappings" configuration page in SharePoint. The page is titled "Content Type Mappings : Meeting Minutes". It includes sections for "Document Type" (set to "PROJ - Meeting Minutes") and "Keyword Mappings".

The "Keyword Mappings" section shows a mapping between OnBase Keyword Types and SharePoint Column Types:

OnBase Keyword Types	SharePoint Column Types
Numeric: Meeting Id	Content Type: Text
Date: Meeting Date	Select: Computed
Alphanumeric: Department	Name: File
Alphanumeric: Meeting Name	Created: DateTime
	Title: Text
	Modified: DateTime
	Document Modified By: Text
	Document Created By: Text

Green arrows indicate the mapping of "Meeting Minutes" to "PROJ - Meeting Minutes" and the mapping of the "Title" keyword to the "Title" column type.

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

HYLAND SOFTWARE