Automates the importing and indexing of emails and attachments

Improves service with instant access to critical content

Reduces business process cycle times

Streamline critical business processes directly from Microsoft Outlook

With the OnBase Integration for Microsoft® Outlook, users throughout your organization access essential content from an application they already know and use every day.

Directly from their Outlook inbox, users easily capture emails and attachments and store them in OnBase as they receive them, instantly connecting this content with related transactions. Users even perform tasks such as approvals without leaving their familiar email interface. This eliminates process bottlenecks, reducing cycle times while keeping critical business processes moving forward.
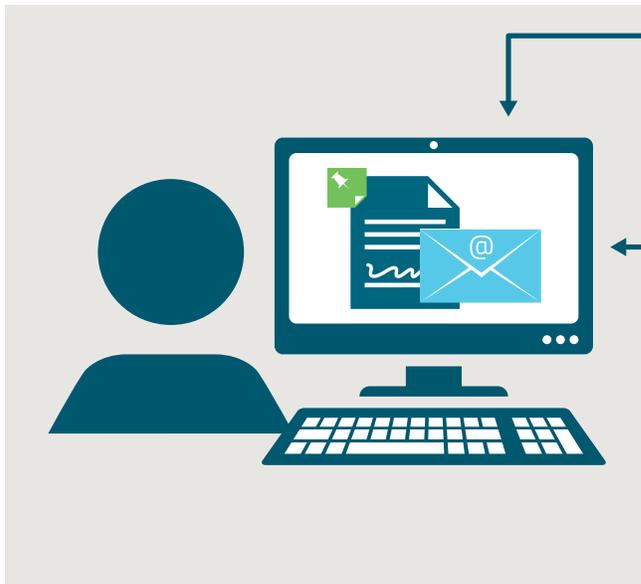
Import emails and attachments

Search for content

Participate in processes

OnBase®
by Hyland

Automates importing and indexing emails and attachments

The OnBase Integration for Microsoft Outlook provides users with multiple methods to capture emails and related attachments as documents. This includes the ability to drag–and–drop content to an Outlook folder with automatic indexing using mail message field mapping. Users can also retrieve OnBase documents directly through Outlook, increasing adoption and reducing training costs.

With Outlook and OnBase working together, users no longer have to save files in multiple locations, eliminating redundancies while also making storage and access quick and easy. At the same time, appropriate personnel have instant, secure access to relevant information – regardless of whether they were the original email recipient.

Improves service with access to critical content directly from Outlook

With this integration, personnel not only use Outlook as their primary email client, but also as a window into OnBase content. Users access all imported documents without leaving their Outlook interface because OnBase retrieval functionality and workflow processing are built right in.

For example, when a sales manager receives a customer complaint via email, he can retrieve any related documents in OnBase directly from Outlook, including any agreements and other relevant documents. This allows for more efficient follow–up and faster resolution – improving customer service and satisfaction.

Reduces business process cycle times

Once users upload documents into OnBase, they automatically trigger specific business processes. Processed documents are routed to decision–makers who receive email notifications with tasks that allow them to move processes forward directly from their inboxes or from the notifications themselves.

By giving your staff the ability to capture, access and process important business documents directly from Outlook, you increase efficiency and service levels while reducing process delays. And, because your staff already works in Outlook, you minimize training and maximize user adoption.

Learn more at **OnBase.com ››**

> "The Outlook Integration is one of our user's favorite pieces of OnBase. It's saved them a ton of time because now they don't have to gather paper, scan it, separate documents and then index them."
>
> – Mitzie O'Rourke, developer, Hilliard Lyons

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