

Automates the importing and indexing of emails and attachments

Improves service with access to critical content directly from Outlook

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 linking this content to related transactions. Users even perform tasks such as approvals without leaving their familiar email interface, keeping critical business processes moving.

OnBase automatically begins processing documents the moment users import them from Outlook – eliminating the need to manually transfer information and further streamlining business processes. With vital business-related content easily accessible right from Outlook, you increase efficiency and improve service.



## Automates the importing and indexing of emails and attachments

The integration allows users to capture emails and attachments directly from Outlook, importing them into OnBase. Once captured and indexed, OnBase links emails and any supporting documents to existing account information for simple retrieval. For example, when bankers receive emails containing important documentation and paperwork for new accounts, they easily upload those documents into OnBase directly from Outlook. This ensures that all documentation and correspondence surrounding those new accounts are available in one central location.

If an employee receives a customer or member complaint regarding that account, she captures any conversations with the customer or member – or with internal staff – into OnBase as proof of resolution. Managers quickly access and review the conversations, either from within OnBase or directly from Outlook.

With Outlook and OnBase working together in the background, users no longer have to save files in multiple locations. At the same time, appropriate personnel have instant, secure access to relevant information – regardless of whether they were the original recipient.

## Improves service with access to critical content directly from Outlook

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

For example, when a loan officer receives a complaint from an account holder, she retrieves any related documents directly from Outlook, including the original agreement and any other relevant content. This allows for more efficient follow-up and faster resolution – improving 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 the process forward directly from their inboxes.

For instance, once a loan officer receives supporting documentation for an application, she indexes the documents in Outlook and uploads them into OnBase. Using those index values, OnBase automatically launches the review and approval process for that specific account. When an employee needs to approve a final loan agreement, she opens an email notification in Outlook and approves, denies or sends forward the agreement right from the email message – no inefficient application switching required.

By giving your staff the ability to access, process and manage important business documents directly from Microsoft Outlook, you increase efficiencies and service levels while reducing process delays.

Learn more at [OnBase.com/Mobile](http://OnBase.com/Mobile) »

**“Outlook Integration is one of our users’ 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



**OnBase**<sup>®</sup>  
by Hyland