



Bulk Export Agent & Manager

Powered by MTS Software Solutions

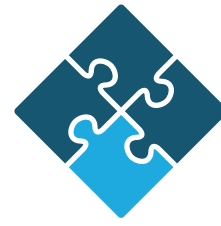
OnBase Bulk Data Exports Just Got Easier



Configure



Automate



Integrate

Provide OnBase users the ability to configure and schedule bulk exports of documents and data from OnBase for integrations, audits, and more.

Ditch the Constraints of Custom Export Scripts



Streamline Customer Service

Quickly respond to customers' real-time inquiries and manage frequently asked requests that pertain to specific client account(s).



Automate Touch-less Exports

Setup export jobs that run perpetually without human intervention by combining the ability to run recurring jobs and load filter criteria dynamically.



Simplify Compliance

Provide documents and images required by auditors, examiners, and government officials without compromising access to your OnBase system.



Improve Administration Experience

Configure export jobs with a user-friendly web interface designed to interact with multiple OnBase instances across Dev., Test/QA and Production environments.



Expand LOB Application Integration

Export data and images in their native format to downstream line of business applications for easy integration. Can include option to convert TIFF to PDF.



Ease Platform Conversion/Migration

Reduce the time and energy required to export data and images from OnBase for full, or partial, conversion/migration.



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MTS BEAM Features

BEAM provides OnBase users with configurable controls to create, automate, and manage mass exports of document and data from OnBase. The module expands the integration capabilities of your OnBase implementation and speeds processing for both real-time and recurring export requirements.



Use Your OnBase Authentication

Users are prompted to enter their OnBase login credentials. BEAM uses the OnBase API to authenticate the user and allow access.



Combine Multiple Export Jobs

Define job groups to link multiple export jobs together. This feature is made possible by the separation of the export job configuration and the export service.



Apply OnBase Custom Queries

Create an export job (a set of parameters) from custom queries that already exist in OnBase. New jobs can also be created as a clone of an existing job or from a template.



Create Mock Run & Preschedule

Use the BEAM Dashboard to create a mock run exporting a small number of documents. Schedule export jobs to run during off-peak hours with flexible output options.



Group Multiple Document Types

Choose one or more document types per export job. BEAM will display the keywords for the selected document type. You can select the keyword(s) for inclusion in the export.



Generate Folders During Export

Define and automatically generate a hierarchy of folders for the exported data and image files. Option includes foldering--using keyword values to create folder names.



Format Your Export Data

Use point and click operations to generate substrings from keyword data, perform date formatting, and add literal constants into the export.



Utilize Dynamic Filter Criteria

Load a multi-column CSV file that contains filter criteria for an export job. Loaded dynamically at the point of export to enable integration with LOB/ERP systems.



Define Export Jobs by Date Range

Specify a beginning and end date for each document type to retrieve documents within a specific document date range.



Receive Export Status Reports

Receive email notifications on export status. Check image existence and validity during export with CRC Check. Generate pre-run analysis and Export Summary Report.

Simplify → Streamline → Accelerate

MTS Software Solutions provides technology and services that simplify, streamline, and accelerate document and data-driven processes. As an OnBase Authorized Solution Provider, we offer the experience and technical expertise to maximize your ROI in ECM.