

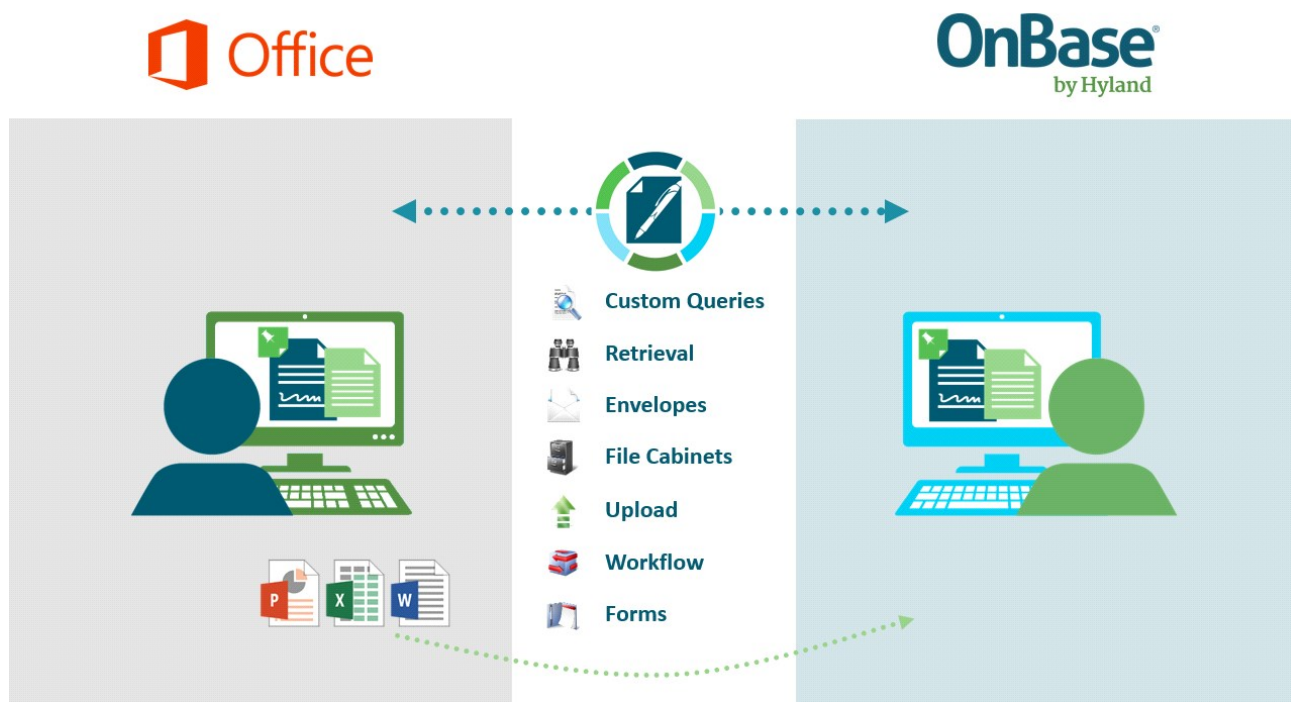
# Office Business Application

## Summary

Office Business Application (OBA) for 2007, 2010, 2013 or 2016 (16) allows users of Word, Excel, and PowerPoint to interact with OnBase enterprise content management through these familiar Microsoft Office interfaces. This integration provides users with single-click menu access for storing, retrieving, and editing OnBase documents and related content, without ever leaving their primary Office applications. The result is an easy-to-navigate interface which extends the powerful functionality of an OnBase solution to Microsoft Office.

## Benefits

- **Improves overall document management** by integrating the benefits of an ECM solution with the Microsoft Office platform.
- **Extends OnBase access** by presenting OnBase features/functions within familiar Microsoft Office interfaces.
- **Increases user efficiency** by significantly reducing the need to jump between different applications to manage content.
- **Minimizes training and support costs** by leveraging user familiarity with Microsoft Office products.



1. Office Business Application provides simple access into OnBase directly from the familiar applications of Word, Excel, and PowerPoint. Any file generated in an Office application can be easily uploaded and managed in OnBase and immediately made available to other OnBase users.
2. Users are able to directly access OnBase documents, regardless of file type, and execute available functionality from the familiar Microsoft Office toolbar ribbon as needed. Office documents will open in their respective application; most other file formats are presented in an OnBase viewer.
3. This integration extends the benefits of an OnBase solution including security, workflow automation, and auditable control at various levels and areas of responsibility throughout your organization, allowing for more connected and efficient interactions.

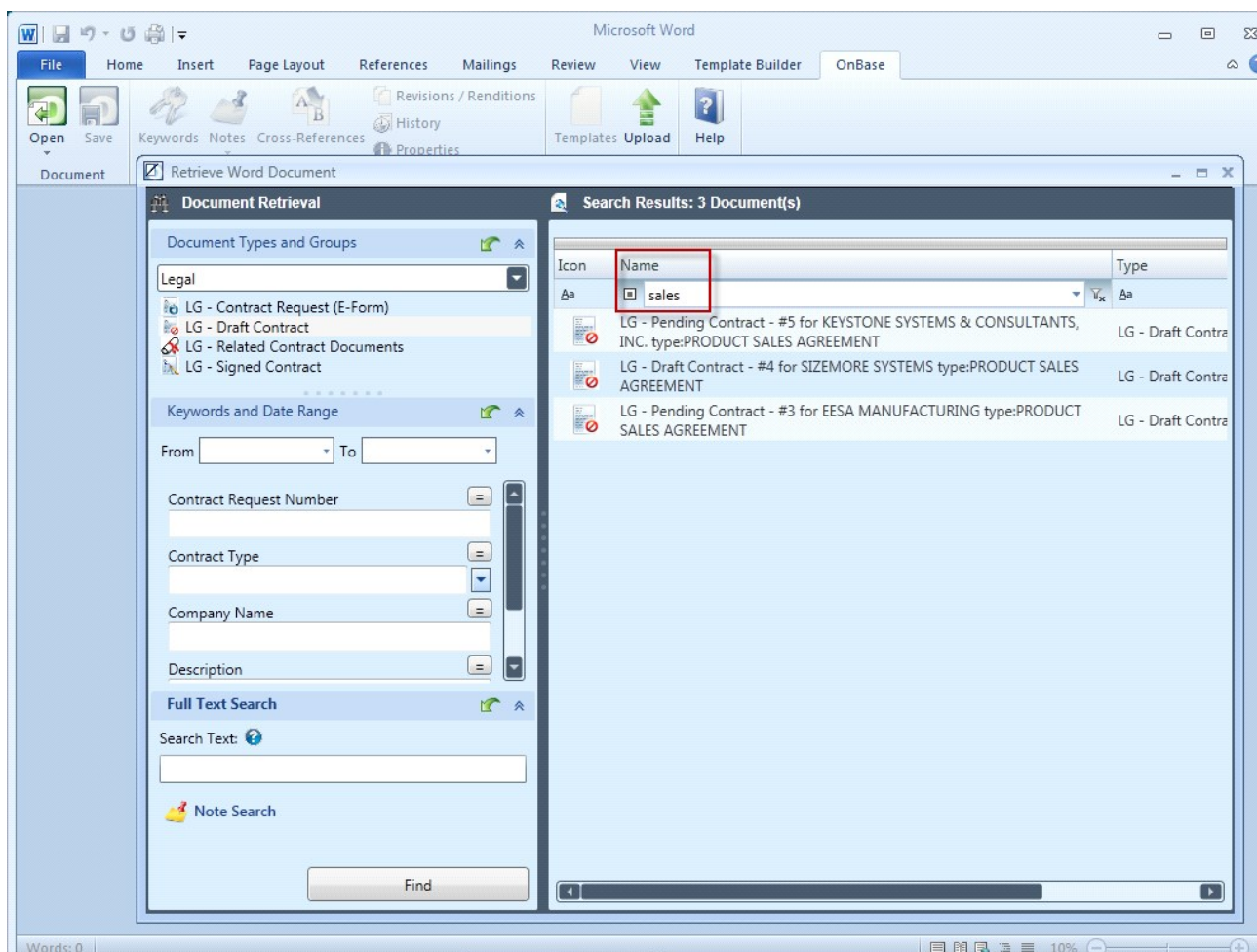
## Applications

- **Legal Departments** have a consistent need to improve contract management, as well as the process by which contracts become final. Legal professionals can simplify this process by sharing relevant notes, cross-referencing related documentation, and maintaining a detailed record of the history of a given contract, all without ever leaving their Microsoft Office application.
- **Sales Budgeting** is a valuable, but time-consuming task. Sales Managers are often asked to key estimated values into a spreadsheet template, which will eventually be scrutinized by executive leadership. Sales Managers can use notes to effectively communicate their justification for a given set of estimated values. Budget approvers have direct access to a complete set of supporting content for improved decision making. Any updates can be saved into the OnBase system for easy review by all designated approvers.

## Key Features

- **Save** new documents created in Microsoft Office applications directly into OnBase with ability to delete files after upload.
- **Upload** non-Office documents, of any file type, including electronic forms, into OnBase from the Office ribbon.
- **Automatic indexing** of documents using OnBase keyword features (AutoFill Keyword Sets, Application Enabler) directly from the Office application.
- **Retrieve documents** stored in OnBase from the Office ribbon via preferred search interface (Document Retrieval, Custom Queries, Envelopes)- combining date, keyword and full-text search.
- **Utilize standard OnBase features** such as Notes, keyword management, cross-referencing, re-index, document properties and history.

## Interface



***'Open' OnBase content directly from the Office application via Document Retrieval (shown below), Custom Queries or Envelopes- using features unique to each search interface, such as Full Text Search, Group by and Column Filtering!***

The screenshot shows a Microsoft Word window titled "62-011D61133F45.docx - Microsoft Word". The ribbon includes "File", "Home", "Insert", "Page Layout", "References", "Mailings", "Review", "View", "Template Builder", and "OnBase". The "OnBase" tab is active, showing a "Keywords" sidebar on the right. The sidebar contains the following fields: "Document Type" (LG - Draft Contract), "Document" (LG - Pending Contract - #5 for KEYSTONE SYSTEMS & CONSULTANTS, INC. type:PRODUCT SALES AGREEMENT), "Document Date" (11/24/2010), "Keywords" (Contract Request Number: 5, Contract Type: PRODUCT SALES AGREEMENT, Company Name: KEYSTONE SYSTEMS & CONSULTANTS, INC., Description, Date Effective), "Save Keywords", and "Close".

The main document content is as follows:

**PRODUCT SALES AGREEMENT**

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9 Second Foods Corporation  
BASE AGREEMENT  
Wednesday, November 24, 2010

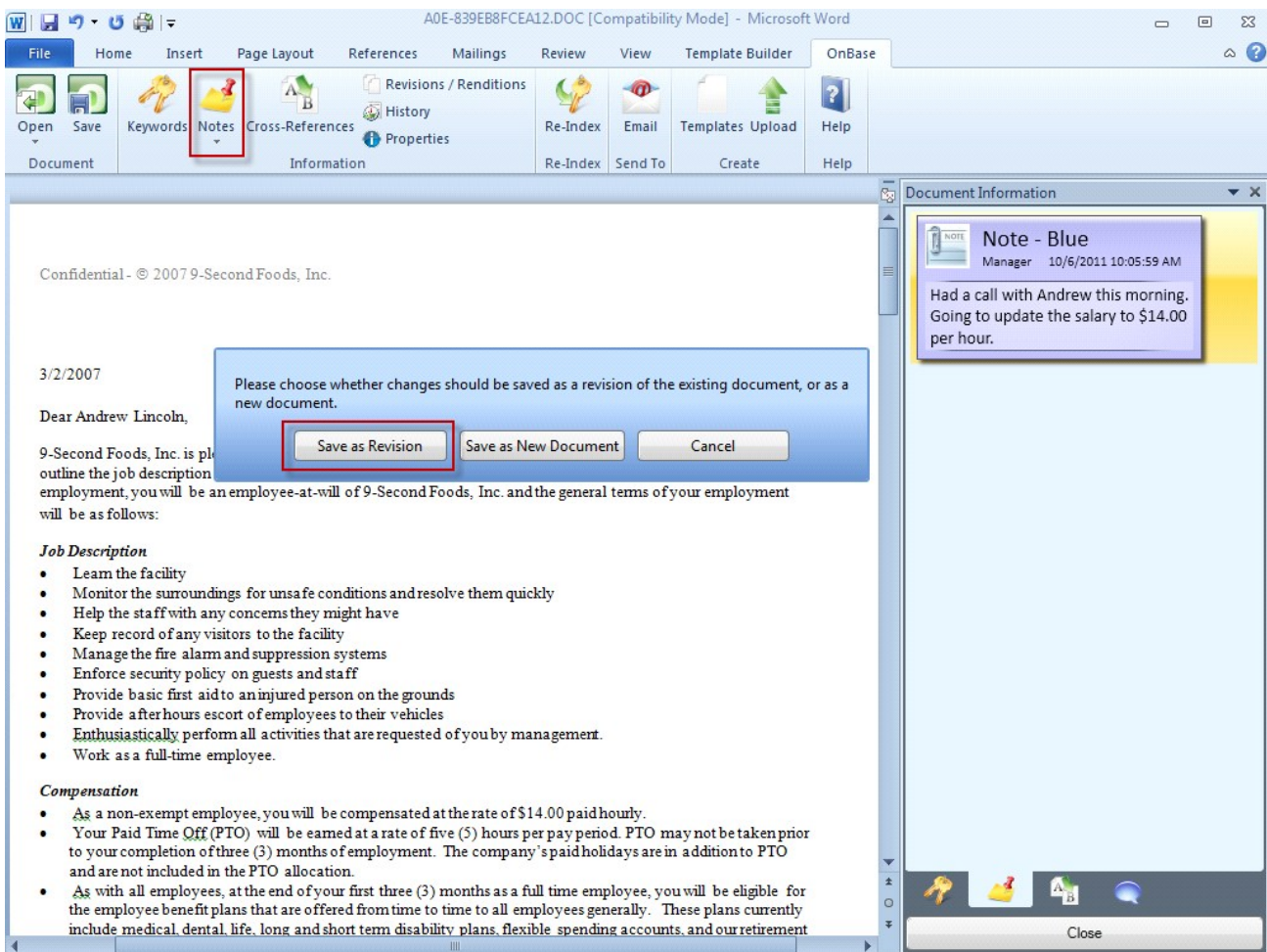
Mr. Michael Falcon  
KEYSTONE SYSTEMS & CONSULTANTS, INC.  
SUBJECT: PURCHASE SCHEDULE PROGRAM  
[\*]  
REFERENCE: PRODUCT SALES AGREEMENT [\*]  
[\*]

Dear Mr. Falcon:

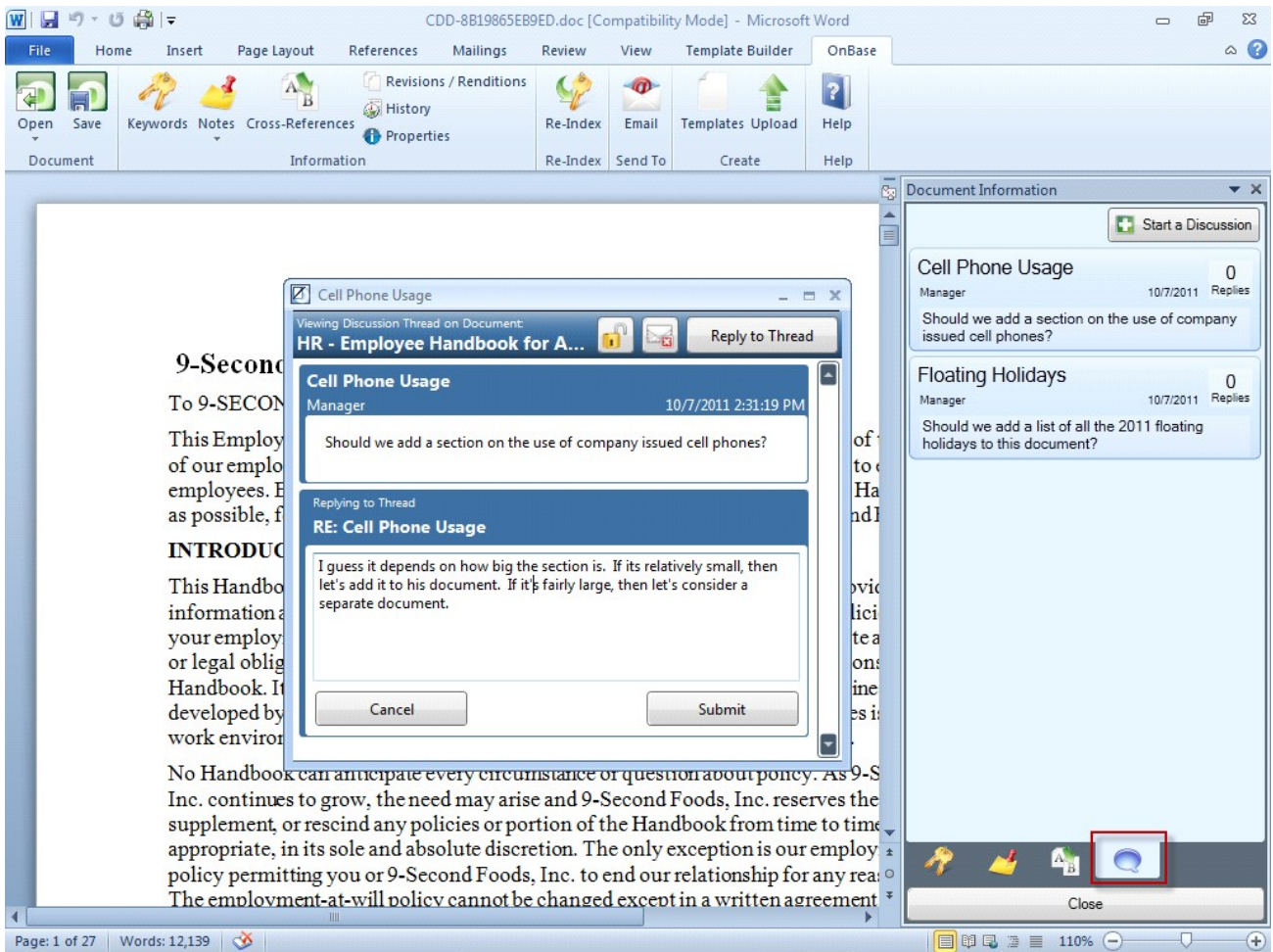
This Purchase Schedule Program agreement is between  
KEYSTONE SYSTEMS & CONSULTANTS, INC. and  
9 Second Foods Corporation (9SF)  
to purchase 9SF products; subject to the above  
referenced agreement and the terms and conditions contained in this letter. In  
addition, the prices quoted below is contingent on the execution of the OEM  
agreement. Details of this transaction, including all prices, should be treated  
as confidential information by both parties.

KEYSTONE SYSTEMS & CONSULTANTS, INC. agrees to purchase according  
to the Purchase Schedule provided. KEYSTONE SYSTEMS & CONSULTANTS, INC.'s

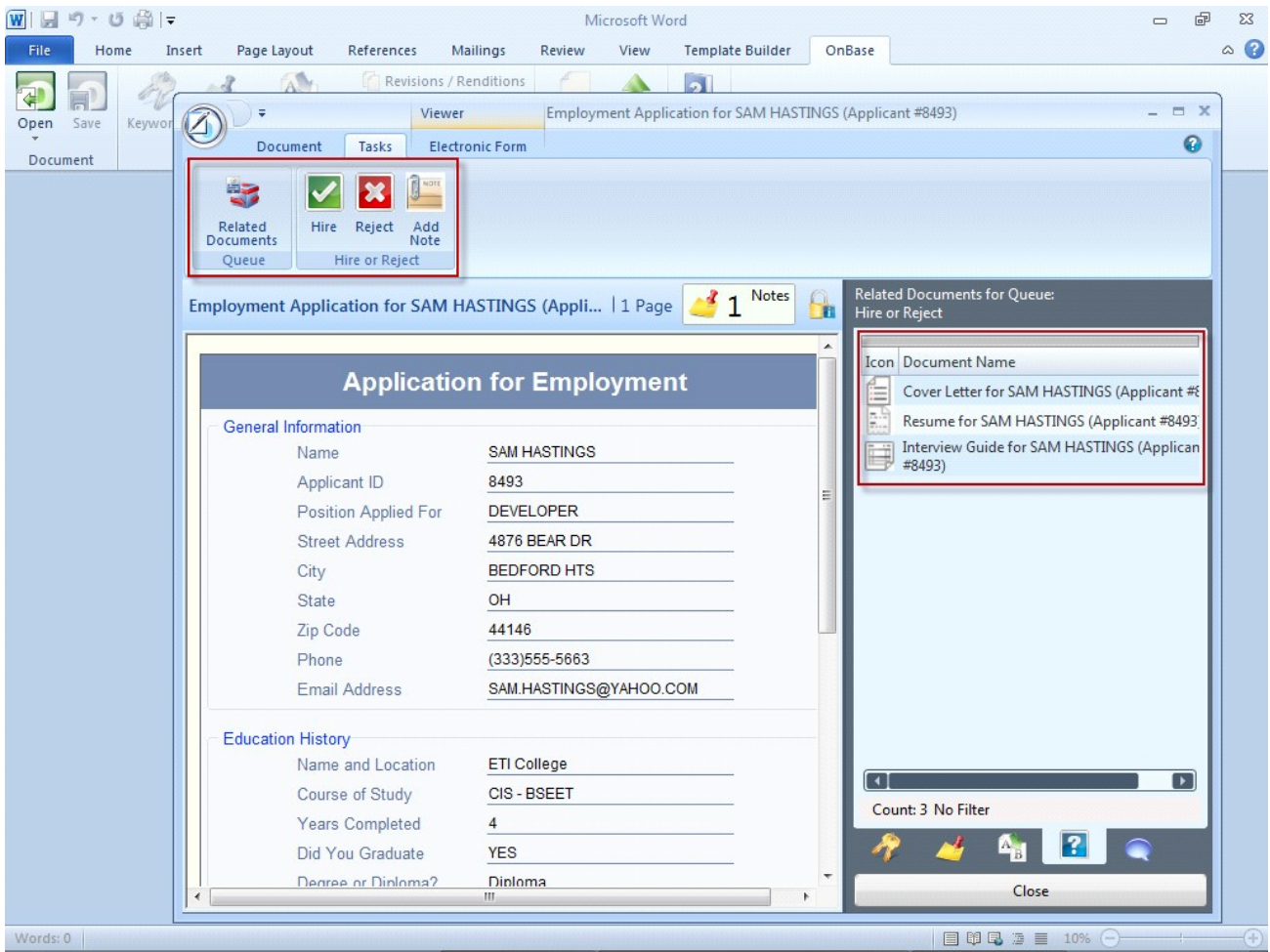
***OnBase document displays in Microsoft Word (shown below), Excel or PowerPoint, with ability to modify keywords and content- as both OnBase and Office features are available in the preferred interface.***



*View, modify and delete OnBase Notes. Also, create new/modify existing documents and 'Save' document changes as a Revision (and stamp as a Version).*

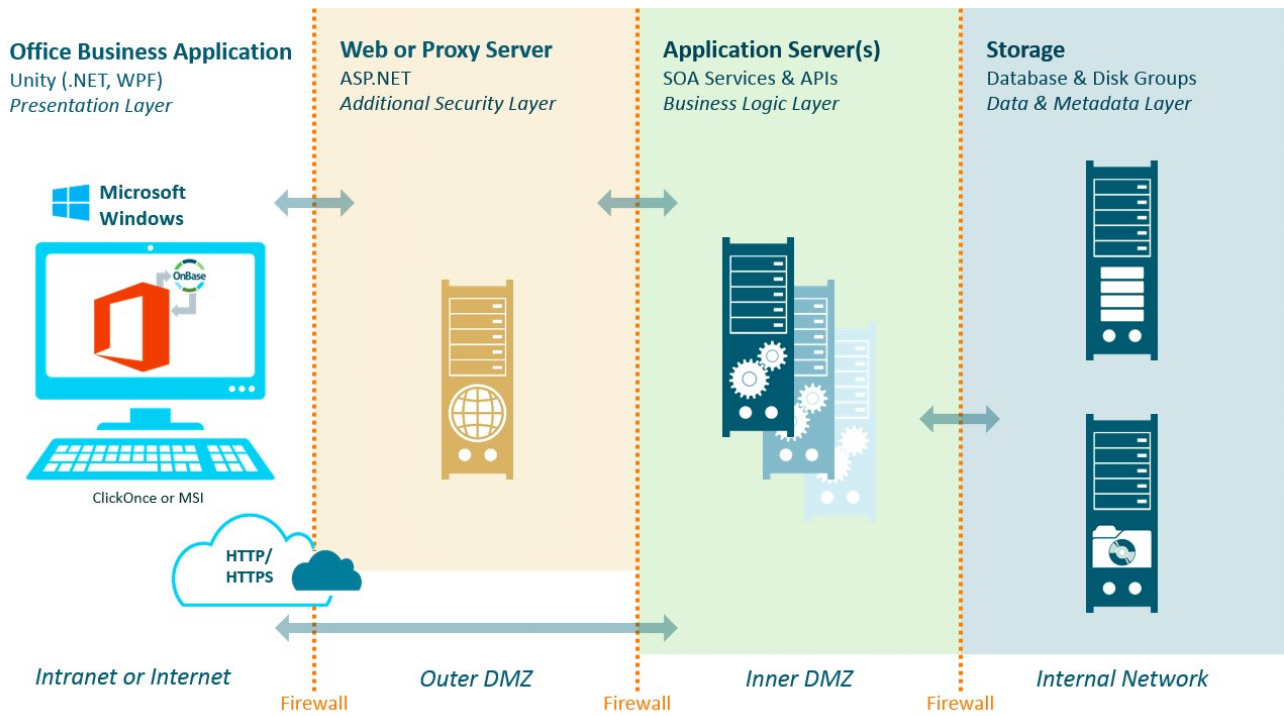


**Document-level discussion thread available alongside the document- pairing content and collaboration.**



***An Integrated Workflow experience provides Ad-hoc Task execution (with User Interaction) on any Document Type, directly from Office.***

## Architecture



Office Business Application is a Windows-based desktop application that stores interface components on the client machine, but ClickOnce (or MSI) technology enables rapid installation to user workstations. Regardless of whether the solution is on-premise or hosted, the integration can be quickly deployed over a WAN across an internal network, or via the Internet using HTTPS over a firewall.

**Microsoft Office** connects via HTTP or HTTPS to the **OnBase Application Server** (Core Services) where connections are made to the **OnBase Database** and **Disk Groups** to store or retrieve content. Optionally, a Web or Proxy Server can be used for an additional layer of security.

Office Business Application for 2007, 2010 or 2013 (Workstation or Concurrent) and OnBase Concurrent Client licenses are required (a Client license is consumed via the Application Server).

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

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One platform  
Unlimited potential

**OnBase**  
by Hyland