

EDM Services

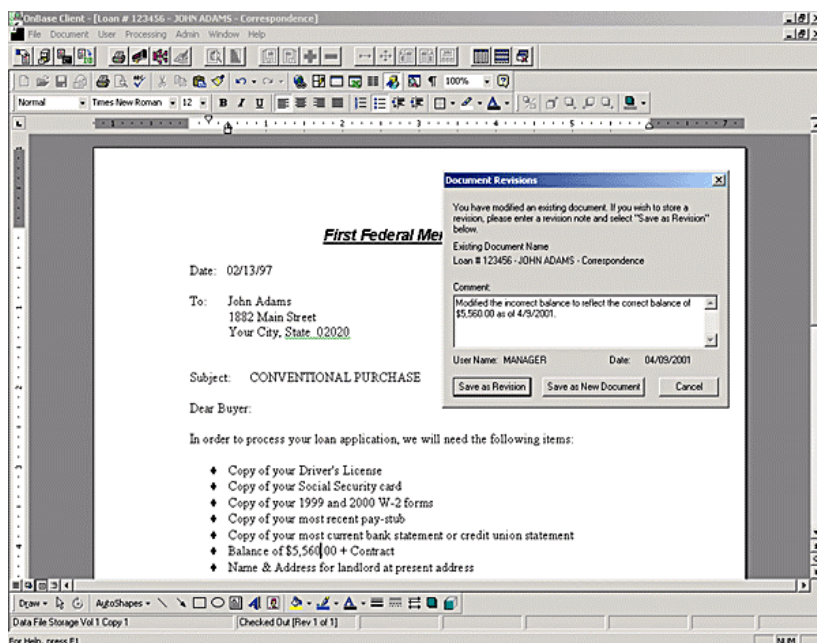
What It Is

OnBase EDM Services allows everyone in an organization to collaborate in the creation of documents and to share the essential information they contain.

EDM Services provides the ability to store and manage documents such as word processing documents, spreadsheets, and presentations. Documents generated in third party applications can be stored directly into OnBase from the native application*. Other features of EDM include revision control, commenting, check in/check out, and document templates.

How it Works

User interaction occurs either from within OnBase or within a third party application. Users can open a document that was originally created in a third party application and stored into OnBase, edit the document using the functionality native to the original application, and save the document back into OnBase as either a revision of the original or as a new document. Revisions enable users to track changes made to a document since creation. Multiple revisions of a single document provide a complete audit trail of all changes and allow users to quickly view a specific revision. Users not wishing to create revisions may edit existing documents and save as an entirely new document, or overwrite the existing one. Revision control settings are assigned to document types and users rights to create and view revisions is controlled by security.



Once residing in OnBase documents can be rapidly accessed via the OnBase client interface or directly through the originating application. Documents can be checked out either short term (for the duration of the OnBase session) or long term, in which case the document can be saved locally to be worked on while traveling, at home, etc. By checking out a document other users are able to access the same document but with read only permissions thereby negating the problem of simultaneous revisions.

EDMS also provides the ability to drag and drop multiple documents from the desktop into OnBase with full indexing support. Once indexed, users can conduct a text search, print, e-mail and/or fax the document directly from the desktop. The document can also be cross-referenced or routed via OnBase Workflow and be made available over the web via OnBase Web Server.

Who Will Benefit

Organizations creating and editing documents in various PC applications will benefit from EDM's ability to create seamless links between applications and the OnBase system. Multiple users collaborating on centrally stored documents will take advantage of the check in / check out feature ensuring that all efforts remain synchronized and all revision comments are captured for future viewing.

Adopting EDMS enables users to continue working with the applications they are familiar with while gaining the benefit of storing all versions of documents in one centralized repository.

* The ability to save or retrieve documents directly from 3rd party applications is not available with all applications. For more information please contact Hyland Software or a Hyland Software reseller.

Technical Features

- Ad-hoc document storage
- Multiple file drag-and-drop import
- Revision control
- Document commenting
- Document check-in / Check-out
- Document Templates

Business Benefits

- Natural extension of the desktop applications that are familiar to users.
- Enhanced document collaboration
- Increased audit control over content
- Central repository providing storage, search, print, e-mail, fax and workflow operations

System Requirements

- EDMS module
- Concurrent client license
- Windows 98, NT 4 sp 4, Workstation/Server, 2000, XP
- OnBase 353.124 database or higher