



**HYLAND**™



# Integrations with OnBase

Brian Kostura – Solution Engineer

# Agenda:

Defining “Integration”

Purpose Built Integration

Configurable Integrations

Custom Built Integrations

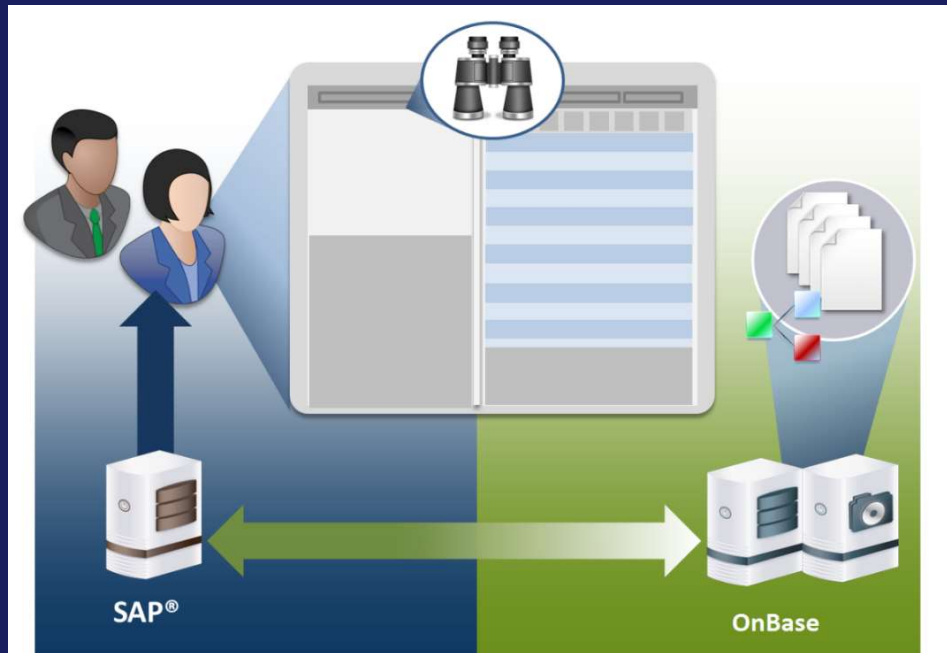


# Definition of “Integration”



# What does it really mean to integrate?

## Content Enablement



## Process Automation



Invoice Document Edit Goto System Help

< **SAP** Display Invoice Document 5

✓  Show PO structure Follow-On Documents ... Ca

Transaction Invoice 5105646255 202

Diff. Posting Not Applicable

Basic Data Payment Details Tax Contacts Note

New 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100

Icon Title Creator Name

Vendor Invoice 2

Amount

Tax ar

Text

Comp

Lot No

PO Re

Item Amount Quantity U... Purchase ... Item

1 92,70 1ST 4500023024 10 C

OnBase

Invoice #5023630 - INTERNATIONAL SOFTWARE, INC - POSTED

Print Back Forward Stop Search Filter Print Preview Refresh Help Settings

**INTERNATIONAL SOFTWARE, INC.**  
FED. ID. NO. 73-7309673  
393 New River Drive, New Jersey Plaza  
Somerset, New Jersey 09393  
Phone (773) 764-9393  
Fax (773) 096-0669

Please remit payment to:  
International Software  
P.O. Box 1155-41151  
Philadelphia, PA 55178

Page 1 of 1

INVOICE DATE	INVOICE NUMBER
01/22/21	5023630

Price Increase on some categories effective 07/01/2021

SAP Voucher - 5/1/2025  
AP MANAGER 5/1/2025 3:03:18 PM

SAP Voucher Number:  
5105646257

ITS PAYABLE  
RE  
OK PLACE  
90147

ATTN: ACCOUNTS PAYABLE  
HYLAND SOFTWARE  
20110 ASHBROOK PLACE  
SUITE 150  
ASHBURN, VA 20147

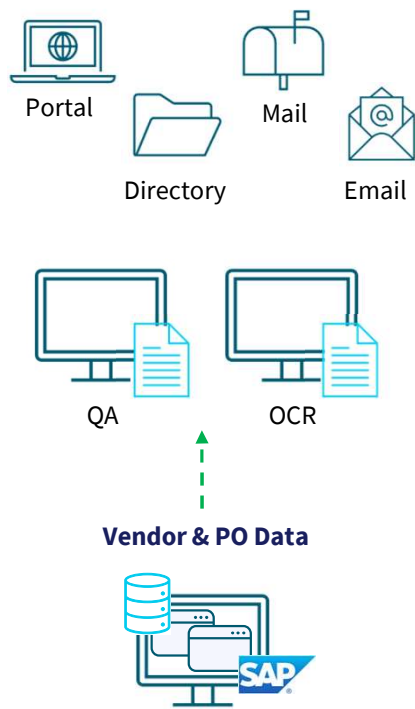
6263

ACCOUNT NO.	CUSTOMER P.O. NO.	OUR ORDER NO.	PAYMENT TERMS	PAYMENT DUE
241070	4500023024	2135664 SO	2% 10 Net 30 Days	DUE DATE: 02/22/21
SALESMAN	DATE SHIPPED	SHIPPED FROM	SHIPPED VIA	NO. OF CARTONS
1496	01/20/21	BLA	524 UPS	1

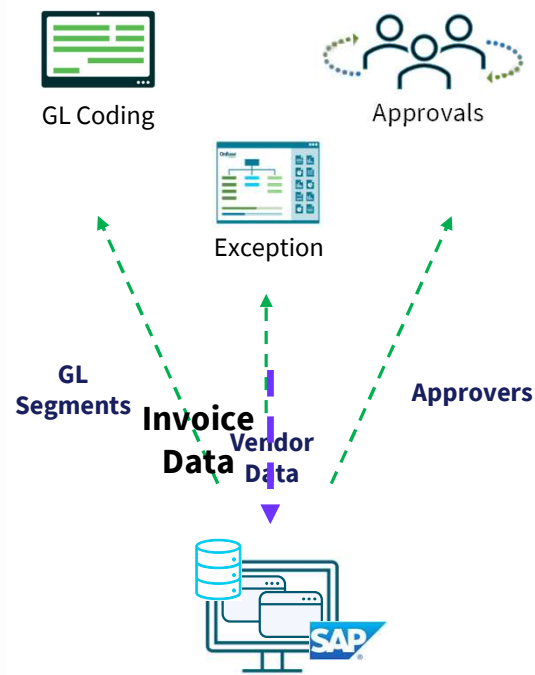
ORDER	QUANTITY	UM	ITEM NO.	DESCRIPTION	UNIT PRICE	EXTENDED AMOUNT
B/O	SHIP	CANCEL				
1	1		EA 31057	BLACK / YELLOW L DISPLAY-135PC	92.700	92.70

# AP Automation Example

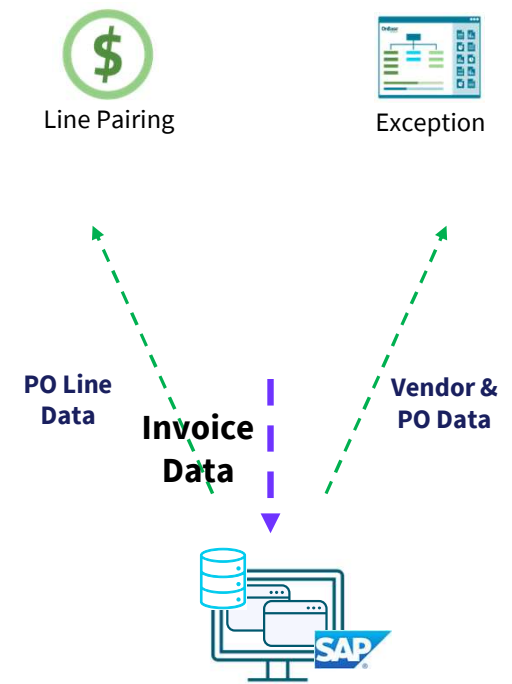
## Capture



## Non- PO Invoice?



## PO Invoice?



# Purpose Built Integrations





# Purpose Built



Hyland

Hyland HR for SAP SuccessFactors

Dorian Gray (dgray)

Finance | Active

Phone:

1 408 899-8971

Email:

dorian@bestrun.com

Department:

Leadership Team BestRun (300)

Location:

US Bank (B200-0001)

All Documents

View Download Progress

Download

Print

Upload Document

Search Documents

Send do...

Send do...

Keywords

<input type="checkbox"/>	Document Name	Date
<input type="checkbox"/>	HR - Emergency Contact Form: DGRAY - GRAY, DORIAN	2020-11-13
<input checked="" type="checkbox"/>	HR - Employment Contract: DGRAY - GRAY, DORIAN	2022-12-06
<input type="checkbox"/>	HR - I9: DGRAY - GRAY, DORIAN	2022-12-06
<input type="checkbox"/>	HR - Non-Compete Agreement: DGRAY - GRAY, DORIAN	2022-12-06
<input type="checkbox"/>	HR - W-4: DGRAY - GRAY, DORIAN	2022-12-06
<input type="checkbox"/>	HR - Tuition Reimbursement Form	Missing Item

### EMPLOYMENT CONTRACT

This employment agreement ("Agreement") is made and effective as of 21 APRIL, 2022, by and between:

**Employer:** BESTRUN, ("Employer") with a mailing address of \_\_\_\_\_, and

**Employee:** DORIAN GRAY, ("Employee") with a mailing address of 998 FOLSOM RD, SAN JOSE, CA.

WHEREAS the Employer intends to hire the Employee for the Position and the Employee desires to provide their services to the Employer for payment.

IN CONSIDERATION of promises and other good and valuable consideration, the parties agree to the following:

**I. EMPLOYEE DUTIES.** The Employee agrees that they will act in accordance with this Agreement and with the best interests of the Employer in mind, which may or may not require them to present the best of their skills, experience, and talents, to perform all the duties required of the Position. In carrying out the duties and responsibilities of their Position, the Employee agrees to adhere to any and all policies, procedures, rules, regulations, as administered by the Employer. In addition, the Employee agrees to abide by all local, county, State, and Federal laws while employed by the Employer.

**II. RESPONSIBILITIES.** The Employee shall be given the job title of FINANCE DIRECTOR, ("Position") which shall involve: LEADERSHIP TEAM RESPONSIBILITIES.

The Employer may also assign duties to the Employee from time to time by the Employer. The Employee shall be expected to work ☒ **full-time** ☐ **part-time**.

**III. EMPLOYMENT PERIOD.** The Employer agrees to hire the Employee: (check one)

☒ - **At-Will** which means this Agreement may be terminated at any time by either the Employee or Employer. After termination by any of the Parties, neither will have any obligation other than the non-disclosure of the Employer's proprietary information as outlined in Section XII and any non-compete listed in Section XIII.

a.) **Employee's Termination.** The Employee shall have the right to terminate this Agreement by providing at least 10 days' notice. If the Employee should terminate this Agreement, he or she shall be entitled to severance, equal to their pay at the time of termination, for a period of \_\_\_\_\_.

Keywords

Employee Documents

Employee ID

DGRAY

Last Name

GRAY

First Name

DORIAN

Date of Birth

11/02/1995

Email

DGRAY@EMAIL.COM

Address

123 CLEMENS AVE

City

WESTLAKE

State

OH

Zip Code

6266

SAP SuccessFactors Integration

# Configurable Integrations





Workflow



WorkView



Unity Forms



Web Server  
POPS



Reporting  
Dashboards



Document  
Composition

Action Type  
Call Web Service

General Options Proxy Authentication Documentation

WSDL  
file:///C:/Users/jcarlson/Desktop/GetActing%20-%20Copy.xml  
☒ Retrieve WSDL at execution time Configure

Method  
Protocol  
SOAP

Method  
ZLnGetActing

Mappings

- ZLnGetActing
  - Return Value : ZLnGetActingResponse
  - Parameters
    - ZLnGetActing1 : ZLnGetActing

Test Mappings

Action Type  
Send Web Request

General Options Proxy Authentication Documentation

Protocol  
https://

Method  
GET

☐ Use the following URI

☒ Use the URI in the following property  
httpEndPoint

Request Settings  
Do not send anything with the request. Configure

Response Settings  
Do nothing with the response. Configure

# DocPop / FolderPop

DocPop

OnBase

Help

DocPop URL Creator

Please select the criteria for your query.

☐ Custom Queries
☒ Document Types
☐ Document Type Groups
☐ Keywords
☐ Document #

AP - Checks

Date Range
From Date:
To Date:

KEYWORDS
Vendor ID
Vendor Name
PHONE SHACK
Vendor Name
Invoice Number

Web Client Type
☐ ActiveX
☒ HTML
Create URL

Modifying the URL created below may result in a non usable URL.
https://zzzz.hyland.com/AppNet/docpop/docpop.aspx?KT170\_0\_0\_0=PHONE+SHACK&clienttype=html&doc

Reset and clear all constraints
Copy URL

OnBase

Document Search Results

Drag a column header here to group by that column.

DOCUMENT NAME

DOCUMENT DATE

Check for PHONE SHACK in the amount of \$3,145.80 - Invoice #: 3110
6/20/2016

Check for PHONE SHACK in the amount of \$2,940.00 - Invoice #: 3220
6/20/2016

Check for PHONE SHACK in the amount of \$1,087.80 - Invoice #: 3330
6/20/2016

Items: 3

Document
Edit
Process
Add Correction
Previous Document
Next Document

untitled

1 / 1
100%

Vendor #: 135
Phone Shack
Check #: 657
Date: 01/10/2012

Apply to Invoice	Date	Gross Amt	Discount	Net Amt
3110	01/07/2012	3,210.00	64.20	3,145.80
Check Total		3,210.00	64.20	3,145.80

No Notes Found
Add Note

Revision 1 of 1
0 Note(s)
0 Discussion(s)

# Import Processes

## IMPORT PROCESSORS



Documents that are output from third-party systems can be imported and indexed automatically, using information within or accompanying the document.



## NATIVE FEATURES



**AutoFill Keyword Sets** and **Keyword Data Sets** call third-party systems to access the timeliest data for use with OnBase content.



Import\_File.txt - Notepad

File Edit Format View Help

Steve Austin,SAustin@gmail.com,(216)555-1521,SECURITY GUARD,APP - Resume,C:\OnBase\Demo Data\DIP\Resume for Steve Austin.tif  
 Steve Austin,SAustin@gmail.com,(216)555-1521,SECURITY GUARD,APP - Cover Letter,C:\OnBase\Demo Data\DIP\Cover Letter for Steve Austin.tif  
 Peggy Johnson,PJohnson@gmail.com,(216)513-1551,TRADE SHOW ENGINEER, APP - Resume,C:\OnBase\Demo Data\DIP\Resume for Peggy Johnson.tif  
 Peggy Johnson,PJohnson@gmail.com,(216)513-1551,TRADE SHOW ENGINEER, APP - Cover Letter,C:\OnBase\Demo Data\DIP\Cover Letter for Peggy Johnson.tif

File Home Share View Manage Picture Tools

Pin to Quick access Copy Paste Cut Copy path Move to Copy to Delete Rename New folder New item Easy access Properties Edit Select all Select none Invert selection

Clipboard Organize New Open Select

← → ↕ This PC > Local Disk (C:) > OnBase > Demo Data > DIP Search DIP

Name	Date modified	Type	Size
Brainware Invoices	3/1/2019 2:55 PM	File folder	
Brainware Transcripts	7/17/2020 3:37 PM	File folder	
DIP	3/1/2019 2:55 PM	File folder	
Word Documents	3/1/2019 2:55 PM	File folder	
Cover Letter for PEGGY JOHNSON.tif	2/27/2017 3:21 PM	TIF File	10 KB
Cover Letter for STEVE AUSTIN.tif	2/27/2017 3:21 PM	TIF File	10 KB
Import_File.txt	2/27/2017 3:16 PM	Text Document	1 KB
Resume for PEGGY JOHNSON.tif	2/27/2017 3:04 PM	TIF File	33 KB
Resume for STEVE AUSTIN.tif	2/27/2017 2:57 PM	TIF File	35 KB

9 items 4 items selected 85.3 KB

## Example of a DIP Process





# Screen Level Integrations



Select Folder

Vendor PO Folder ▼

Select Document Type

AP - PO Invoices ▼

OnBase Keyword Types

PO Number PoNo ✖

Company

Country Code

Document Handle

Header Exception

Invoice Date

Invoice Freight

Invoice Number

Invoice Tax

Invoice Terms

Invoice Total

ACC Fields

PoNo

contentmode



## Invoice Search 1110

Invoice

Purchase Order

Documents (WUF)

Documents (ACC)

## INVOICE Computers Are U

INFORMATION

Style:

Entry Status:

Unit:

Voucher ID:

INVOICE

Invoice Number

Invoice Date:

Payment Terms

Subtotal:

Folder Type: Dynamic

PO # 656

Document List

Document Name

Contains...

[1] Invoice-#1110 (PO #656) for COMPUTERS ARE US, \$3,775.00 on 1/7/2022 (PENDING POST)

[1] Missing AP - Credit Memo

Packing Slip for PO 656 from COMPUTERS ARE US

Missing AP - Checks

Purchase Order 656 for COMPUTERS ARE US in the amount of \$3,775.00

Items: 5

Child Folders Related Folders

OnBase

Exit

Invoice-#1110 (PO #656) for COMPUTERS ARE US, \$3,775.00 on 1/7/2022 (PENDING POST)

Arrow Annotation

== INVOICE ==

Computers Are Us

12345 Lincoln Boulevard, Suite 225  
Lincoln, Nebraska 68501

Invoice No: 1110  
Date: January 7, 2022

To:  
Hyland Industries  
19000 Quickly Circle  
Columbia, MO 65201

Ship To:  
Same

Salesperson	PO Number	Date Shipped	Shipped Via	FOB Point	Terms
Bill Smith	656	1/7/22	UPS		2% 10; Net 30

Quantity	Description	Unit Price	Total
1	Evolution 5 ST\90	2,795.00	\$ 2,795.00
2	4 GB MEM Upgrade	181.00	362.00
1	Video Card	199.00	199.00
1	Hard Drive	342.00	342.00



# Robotic Process Automation

Open mail attachments

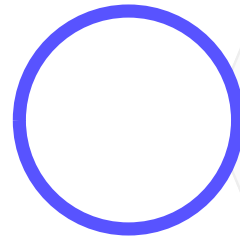
Login in web or other software applications

Moving files and folders

Copy and paste data

Filling in forms

Execute if/then decisions



Collecting data from the Internet

Connection to existing interfaces (API)

Perform calculations

Filter structured data from documents

Social Media statistics



# Custom Built Integrations



# OnBase APIs

## {Unity} APIs

- The Unity API is a web service-based API
- Requires a Hyland provided client-side library to develop against
- Libraries are provided in .NET and Java
- This API is also utilized when writing “scripts” that will run inside OnBase, such as Workflow or WorkView



## {REST} APIs

- REST APIs based on REST industry standards, including documented using Open API
- Client-side library is not required, allowing for calling from any language
- 3<sup>rd</sup> party tools can be used to generate client libraries for many different languages





## WEB SERVICES PUBLISHING

- Point and click ability to create a custom OnBase SOAP or REST web service that can be consumed by third-party applications
- Initiated by other system calling an OnBase web service



File

Home

Workflow

Life Cycle

WorkView

Unity Scripts

Unity Integrations

Integration Services

Notifications

Capture Process

Web  
OperationMessage Item  
TypeSerialization  
Type

WSDL

Publish  
ProjectCopy  
Project

New

Web Operation

Repositories

OnBase - Cindy Smith

<http://localhost/appserver/service.asmx>

Workflow

WorkView

Unity Integrations

Integration Services

Notifications

Capture Process



Web Service Publishing



OnBase Object Serialization



EIS On-Ramp



EIS Off-Ramp

Start Page



Hyland Software

OnBase Studio 18.0

## Recent

- HR - Applicant: Hire or Reject
- AP - Delivery Exceptions

## Tasks



Create Life Cycle

A life cycle contains the



Create Application

A WorkView application



Create Notification

A notification provides t



Create Capture Process

Capture Process Designe



## OnBase Documentation

[FILTERS](#) ▾[English](#)[OnBase](#) ✕

### Foundation Releases

[OnBase Foundation 25.1](#)[OnBase Foundation 24.1](#)[OnBase Foundation 23.1](#)[OnBase Foundation 22.1](#)

### OnBase API

[sdk.onbase.com](https://sdk.onbase.com)

### OnBase Solutions

[Clinician Complete and Return](#)[Content Conditioning](#)[Epic Chart Search](#)[Hyland Integration for Encompass](#)[Integration for Epic Tapestry](#)[OnBase Integration for Salesforce](#)[Pre-Visit Document Management](#)

<https://support.hyland.com/p/onbase>



Join Hyland during the SAP Sapphire & ASUG Annual Conference

- 📅 **Date:** May 21, 2024
- ⌚ **Time:** 5:00 PM to 7:30 PM (perfect time post-conference and pre-SAP Customer Appreciate Event)
- 📍 **Location:** Summer House Patio & Sand Beach at Disney's Grand Floridian Resort, Orlando

Escape the conference crowds and indulge in a white-glove experience just for you. Enjoy **breathtaking views**, **gourmet hors d'oeuvres**, and **hand-selected spirits**, accompanied by the soothing melodies of a live solo violinist.

Mingle with industry peers and Hyland experts in one of the most tranquil and magical settings. And when the evening winds down, hop on the monorail from the Grand Floridian to EPCOT's closing celebration.

This is an intimate event for select guests only. Space is limited, so be sure to reserve your spot today.

☀️ **What to Expect:**

- Stunning waterfront views of the Seven Seas Lagoon
- Delectable hors d'oeuvres and premium spirits
- Live instrumental music to elevate the ambiance
- Engaging conversations with like-minded professionals and Hyland experts

Don't miss this unforgettable evening that blends relaxation, refinement, and connection.

**RSVP Now!**



**SAP Sapphire &  
ASUG Annual  
Conference  
Orlando**

**In-person event | May 19–21, 2025**  
Orange County Convention Center (OCCC)  
Orlando, Florida



