

ONBASE INTEGRATION FOR SALESFORCE FAQs

GENERAL

What is OnBase Integration for Salesforce?

OnBase Integration for Salesforce (OIFS) provides an intuitive way for users to view content and import documents from their Salesforce screens. Users have seamless access to content services capabilities, including the abilities to search, process (Workflow) and upload directly from Salesforce. Configuration and mapping activities are surfaced within the Salesforce interface as well, tightly coupling OnBase and Salesforce for an optimal user experience. The goal of this integration is to seamlessly extend OnBase content features to Salesforce users, providing a complete view of information from a single screen.

What is the minimum OnBase version that is supported?

OnBase Foundation Enhancement Pack (EP) 3 is recommended for both on-premises and hosted solutions. *The latest OnBase Integration for Salesforce is version 3.0.0 and corresponds with OnBase Foundation 22.1.*

FEATURES

What's new and on the roadmap?

With OnBase Foundation EP5, Hyland introduced Workflow as part of OnBase Integration for Salesforce. Workflow will provide the ability to initiate and execute tasks from Salesforce objects, and view and access Workflow queues. This release also features the ability to access OnBase documents and workflows from Salesforce Mobile, as well as capture and device-camera integration for import. Lastly, shortly after the release of Foundation EP5, we introduced the addition of print and download document features.

OnBase Foundation 22.1 introduced a new data display grid with advanced filter features and bulk attachment (document) migration.

Future release of OnBase Integration for Salesforce *may* include more rich content features (notes, annotations, etc.), OnBase Video integration, and support for WorkView objects and Unity Forms.

Can OnBase WorkView objects be presented within Salesforce?

No. As of the latest OnBase Foundation 22.1 release, not yet. We will feature the ability to integrate with OnBase WorkView on the longer-term roadmap and will begin work as the APIs become available internally.

What will happen to the documents currently stored in Salesforce?

A migration tool for these documents is available as of OnBase Foundation 22.1 or higher. The tool will migrate higher-cost Salesforce-stored documents into OnBase. In order to configure, admins will need to map OnBase document types to Salesforce objects.

Does OnBase Integration for Salesforce work with Salesforce Experience (Community) Cloud?

Yes! The OnBase application can be setup in the Salesforce cloud for external user access. However, Hyland is still determining how to price and gate community users since a single user (new service account license type) is required to connect a group of external community users.

In the meantime, the Product team is looking for a pilot customer for Salesforce Experience (formerly Community) Cloud; [email the team](#) if you have a customer in mind!

SALES

What is the cost of OnBase Integration for Salesforce?

Pricing has been set at \$240 USD per user annually for on-premises solutions, and \$420 per user annually for solutions hosted in the Hyland Cloud. There is a 25-user minimum. Enterprise licensing is available.

Please note: An OnBase client license of any kind is NOT required for Salesforce users.

Is a demo available?

There is a hosted demo on [Try.Hyland.com](https://try.hyland.com) and a demo video (mp4) available on [Hyland Community](#). A [click-through demo](#) is also available, which highlights the basic functionality provided. Partners who have a customer that requires a live demo beyond these options should submit a solution provider assistance request (SPAR).

Will OnBase Integration for Salesforce be available on the Salesforce AppExchange?

Yes, after completing an extensive security review and certification process with Salesforce in 2020, OnBase Integration for Salesforce is listed on the [Salesforce AppExchange](#). Customers can download the Salesforce components instantly as part of a free, 30-day trial, and work with Hyland and Hyland partners for configuration support.

Does OnBase Integration for Salesforce require a services engagement?

In addition to the standard OnBase database, disk groups and application server, this product requires new components, such as the Hyland identity provider (IdP) and API server that have recently been introduced to OnBase customers. As a result, this is a "services-recommended" product to ensure Hyland can assist with deploying these new technologies, as well as configuring the OnBase Integration for Salesforce. We are currently working with Hyland Professional Services to determine the amount of effort this will require.

Does Hyland offer a Salesforce integration for non-OnBase customers?

Yes! In addition to OnBase Integration for Salesforce, Hyland offers Perceptive Content Interact for Salesforce, Nuxeo Salesforce Connector and Alfresco Content Connector for Salesforce. All four are available as cloud-hosted solutions.

TECHNICAL

Are there limitations around where the app can reside inside of Salesforce?

The OnBase application is designed to be hosted anywhere inside Salesforce. The flexibility of the OnBase app allows it to be placed within any module or area within Salesforce where a 'Visualforce' page can be added. For example, the admin part of the OnBase application is displayed as a tab and rendered full screen, whereas the viewer component is displayed within an iframe inside Salesforce objects (both standard and custom).

Please note: The OnBase components can be hosted inside any Salesforce object — even custom objects, a clear differentiator from competitors who provide similar capabilities!

Can OnBase Integration for Salesforce integrate with other SFDC apps, such as BasicGov or FinancialForce?

Since the creation of this integration, Hyland has not discovered any Salesforce applications that cause an interoperability issue. Hyland does not restrict any Salesforce objects, which means OnBase Integration for Salesforce can also integrate with custom components inside of Salesforce.

What can you tell me about the integration architecture?

The OnBase Integration for Salesforce app is essentially a Hyland Experience based Angular SPA application that performs all the OnBase content specific tasks like search, filter, view, and import. It also allows admins to create OnBase metadata configuration mappings to Salesforce tag-objects. It communicates with the OnBase repository via the Hyland API server to retrieve and store OnBase content. It uses Hyland IdP to authenticate

users against OnBase. This component can be generally hosted on IIS or any web server like tomcat as it is a purely static JavaScript based application that does not have a backend component.

Is OnBase document management security respected for Salesforce users?

Yes. The Salesforce users are also OnBase users with rights. Hyland IdP is used to authenticate Salesforce users into OnBase and will respect their document level permissions and privileges.

How quickly will the integration app be updated to comply with any changes Salesforce makes with their release schedule?

A new version of Salesforce is released three times a year and updates are pushed to all Salesforce organizations every four months. A preview version of these changes is released to sandbox version of Production organizations. Hyland runs a full regression test on the application in our test sandbox. If there are breaking changes in the OnBase Integration for Salesforce, a new version of OnBase Integration for Salesforce will be released before Salesforce pushes its new version to the customer's production environment. The administrator will need to upgrade OnBase Integration for Salesforce in such a scenario.

RESOURCES

What resources are available?

Resources available at no cost to customers include:

- [Integration for Salesforce Hyland Community group](#)
- [Integration for Salesforce product overview](#)
- [Integration for Salesforce demo video](#)
- [Integration for Salesforce demo lab](#)
- [Salesforce AppExchange listing](#)
- [Hyland Salesforce Integration web page](#)

CONTACTS

Whom should a Hyland employee contact with additional questions?

Reach out to product manager [Don Dittmar](#), product owner [Nicholas Donnell](#) or technology evangelist [Colleen Alber](#) with any questions.

Whom should a Hyland partner contact with additional questions?

Reach out to your Hyland account executive with any questions, or begin a discussion with Hyland experts and peers via the [Integration for Salesforce Hyland Community group forum](#).