



Process focus. Excellence.

A yellow network diagram consisting of a central circle connected to six surrounding circles by lines, forming a star-like shape.

OnBase to Vantage Connector

Administration Guide

OnBase to Vantage Connector: Administration Guide

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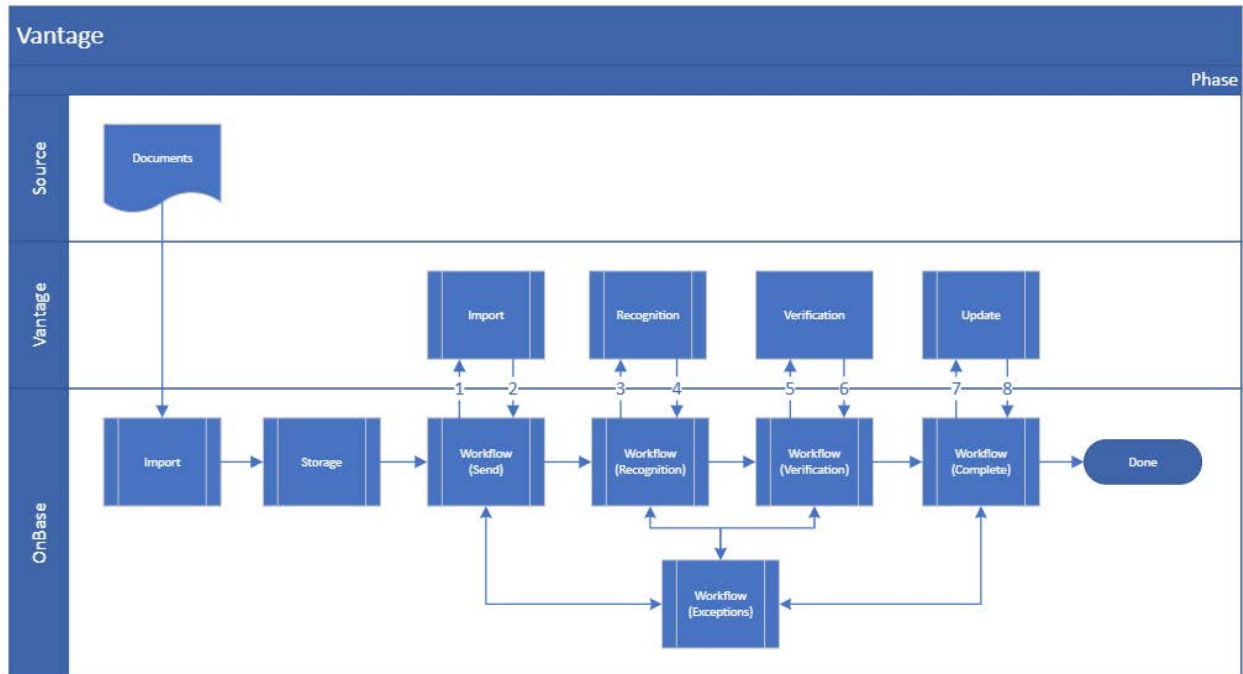
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Visio Diagram

Please use the Visio Swimlane Diagram as a reference point for the “steps” referred to in the following sections.



Process

Documents are ingested into OnBase from a source, stored, and routed to a Lifecycle. Any OnBase import mechanism works if the document type creates an item in the Lifecycle.


The Lifecycle controls interaction between the documents in OnBase and Vantage. In OnBase we create queues that interact with each of the Vantage steps in the process. The standard, basic capture steps are:

1. Import
2. Recognize
3. Verify
4. Export

Import (OnBase)

This would be any import process used by OnBase. Manual upload, MBI, scan queues, API, and others.

Supported file formats are PDF, GIF, JBIG2, JPEG, JPEG2000, PNG, TIF, BMP, HEIC, DOC, DOCX, DOCM, RTF, ODT, TXT, HTML.

 Any other file formats would need to be converted before uploading to Vantage.

Lifecycle

The Vantage workflow controls communication between OnBase and Vantage.

OnBase is continually checking Vantage to determine the status of the document being processed. Vantage simply contains a copy of the document. At each step in the workflow, OnBase updates keywords and transitions the document to the appropriate queue based on the results returned from Vantage.

Upload Document (To Vantage)

Step #1 is to upload the file/document to Vantage, from OnBase. This uses API code to connect to the Vantage REST service for uploading a document. **Step #2**, Vantage will return a “Transaction ID” used to track and monitor the status of the document in Vantage. The workflow would get a success or fail message from Vantage.

The name of the queue is SYS: AP Vantage – Upload.

The name of the script is “Send Invoice to Vantage”.

In the event of a failure, the document will be routed to an “Exceptions” workflow queue in OnBase, with a message indicating what the failure was. On success, the document is transitioned in Workflow to the Recognition queue.

The Transaction ID is stored as a keyword on the document in OnBase to be used in further transactions.

Documents are “converted” to Group4 TIF images for processing by Vantage. Only a copy of the document in OnBase is delivered to Vantage for processing. The source native document in OnBase is never altered.

Recognition

Recognition is a silent/automated process in this solution. For **steps #3 and #4**, the documents in workflow wait in this queue until Recognition is complete. Status is checked using the Transaction ID from Step #2. The Recognition queue in OnBase uses a timer that checks the status of the document in Vantage.

The name of the queue is “SYS: AP Vantage - Recognition”.

The name of the script is “Check Vantage Transaction Status”

Once complete, Vantage will return a link to Manual Review if needed. Or the result will contain the data needed to update the keywords. We will code the Recognition queue to respond accordingly.

Verification

For **steps #5 and #6**, Vantage contains a verification module called “Manual Review”. Available through a web browser, the API will return a link to review the document. Operators can access Manual Review to verify OCR results.

Alternately, we have an option of just populating keywords with OCR results and letting operators correct and OCR mistakes directly in OnBase. No need to use Vantage Manual Review. If so, the use of Vantage ends here.

If we engage the use of Manual Review, then the Verification queue acts the same as the Recognition queue. On a timer, the OnBase workflow checks to see if Manual Review has been completed.

Processed

This would typically be the “Export” process in FlexiCapture. In **steps #7-8**, the documents are already in OnBase, so no document transfer between Vantage and OnBase needs to be performed. Keywords are updated with the validated data from Manual Review, and the document is transitioned out of the Lifecycle for continued processing. As an example, invoice approvals and payment.

Configuration Items

All these configuration items except Vantage-SkillId are required each time OnBase connects to Vantage.

Vantage-ClientId

This is created in Vantage Configuration under Public API Client. Please review the configuration for Public API Clients [at this link](#). Use the value of the “Client ID” in this config item.

Vantage-ClientSecret

This is created in Vantage Configuration under Public API Client. Please review the configuration for Public API Clients [at this link](#). Use the value of the “Client Secret” in this config item. NOTE: this is only displayed once during the initial creation of the Public API Client! HINT: You can always make a new one.

Vantage-GrantType

Currently, the grant_type is always “password”.

Vantage-Password

This holds the password of the user account created in Vantage Configuration for the API process. Hyland warns against the storing of passwords in Configuration Items, but it is there out of convenience. A future release will have the option of storing the password in a different location.

Vantage-RootUrl

Vantage REST API integration uses a root URL from accessing the API. This may periodically change so we made this a configuration item. The current value is:

<https://vantage-us.abbyy.com/api/publicapi/v1/>

Vantage-Scope

Currently the scope is a static value of “openid permissions global.wildcard”.

Vantage-SkillId-Accelerator

This is the unique identifier of the Process skill created in Vantage. We get this from the swagger tool from the response JSON of the /api/publicapi/v1/skills. You can also view this ID in the URL when opening the skill in Vantage when editing the skill.

Vantage-TenantId

The Tenant ID can be found on the General tab under Configuration for Tenant Administration. This is your unique identifier for your Vantage tenant.

Vantage-Username

This holds the user account created in Vantage Configuration for the API process.

Vantage

Document Skill

Base Document Skill

Any document skill can be used with this integration. The document skill needs to be created and assigned to the process skill.

Accelerator

Naviant's Invoice Accelerator package has a pre-defined list of fields and rules used as the configuration of the Document Skill. Line-item extraction is not included in the basic Accelerator plan. Here are the fields that come pre-configured:

- Invoice Number
- Invoice Date
- Subtotal
- Sales Tax
- Shipping
- Invoice Total
- Vendor Information
 - ID
 - Name
 - Address
 - City
 - State
 - Zip
 - Country Code
- Invoice Type
- Purchase Order Number
-

Process Skill

Base Process Skill

As in a Document Skill, we can apply any Process Skill to the OnBase workflow. You use the Vantage Skill ID to associate the workflow to the appropriate skill.

- ❗ Change the "Output" stage settings to use JSON "Values only" to create an easy integration with OnBase and Vantage.

Accelerator

A pre-defined Process Skill has already been created for the Accelerator package.

Roles

- Vantage Tenant Administrator
 - Has all permissions inside the tenant and can do the following: invite new users, assign roles. Has access to all skills.
- Skill User
 - Can process documents using existing skills and view the skills in the Skill Monitor.
 - Can limit per skill.
- Processing Supervisor
 - Can observe transactions being processed by the skills and carry out a manual review at specified Process Skill stages.
 - Can limit per skill.
- Skill Designer
 - Can create new skills. Has all permissions for existing skills and can do the following: process documents using skills, copy, edit, export, delete and publish skills. Additionally, can see the skills in the Skill Monitor.
- Manual Review Operator
 - Can carry out manual review at specified Process Skill stages.
 - Can limit per skill.

Username	Email	Role	Skills

Data Catalogs

Data Catalogs can be used to compare OCR results of documents to data sets, or data tables, for automatic matching and auto verification purposes. There are 2 methods of synchronizing data catalogs to source data tables: standard CSV-text files synchronized through SFTP, or REST API.

Vendor (Invoices)

The Vendor data catalog is a pre-defined data catalog.

OnBase

Document Type

Create a base document type for direct use of the Vantage integration.

Workflow

There is a pre-defined workflow for specific use with this Vantage integration.

Tasks

Use this section to track high-level tasks for implementing this Vantage-OnBase Connector.

- OnBase Cloud implementation will need to have the Vantage endpoints whitelisted for access from workflow. Contact Hyland or your Hyland partner for more details.

Component	Task	Description
OnBase	Create/Import Workflow	
	Modify Configuration Items	
	Modify Queues/Actions	
	Test Workflow	
Vantage	Create/Import Document Skill	
	Create/Import Process Skill	
	Create Data Catalogs	
	Test Skills	
	Publish Skills	

License and Credentials

License number:

Tenant name:

Admin e-mail:

<https://vantage-us.abbby.com/>

Admin User:

Password: