PROFORMANCE
The Information Access Company

HostSync

Product Overview

Definitions

DMS – Document Management System - OnBase document management system

Primary Keyword – the keyword on a document type that will always be indexed. Typically, the primary keyword is the first keyword in the list of keywords, but that is not required.

Product Overview

The HostSync product involves synchronizing customer information (loan #, customer name, social security number, etc.) on the host with associated autofill values and keywords in the OnBase system. The goal of synchronization is to facilitate the indexing of documents and maintain accurate keyword information within the OnBase system. Synchronization is achieved by updating the OnBase database with current information received from the host.

The autofill feature in the OnBase system allows an employee to input the customer account number, for example, and all other customer information will automatically be populated into the appropriate keyword fields. This prevents double keying of information and reduces the time necessary to index documents in the OnBase system. With new customer information however, autofill values are not available until entered into the host – typically a manual process. With host synchronization the information can be provided to OnBase from the host prior to the indexing of the new documents. When indexing documents for a new customer, employees will not be required to look up customer information or type in keyword information that already exists on the host thus expediting the indexing of new documents.

Synchronization of the host with OnBase keywords keeps the OnBase system current with customer information. For example, a document type is set up with the account number as the primary, but it also includes the social security number as a keyword. In this example, a social security number was mistyped in the host initially and later corrected. Without host synchronization the correction would not be updated in OnBase and the document could not be retrieved based on the correct social security number. With host synchronization however, the correction would automatically be updated in OnBase providing the OnBase system with accurate customer information at all times.

The process adds, updates or removes autofill and keyword information from OnBase based on what exists on the host. There are two independent parts.
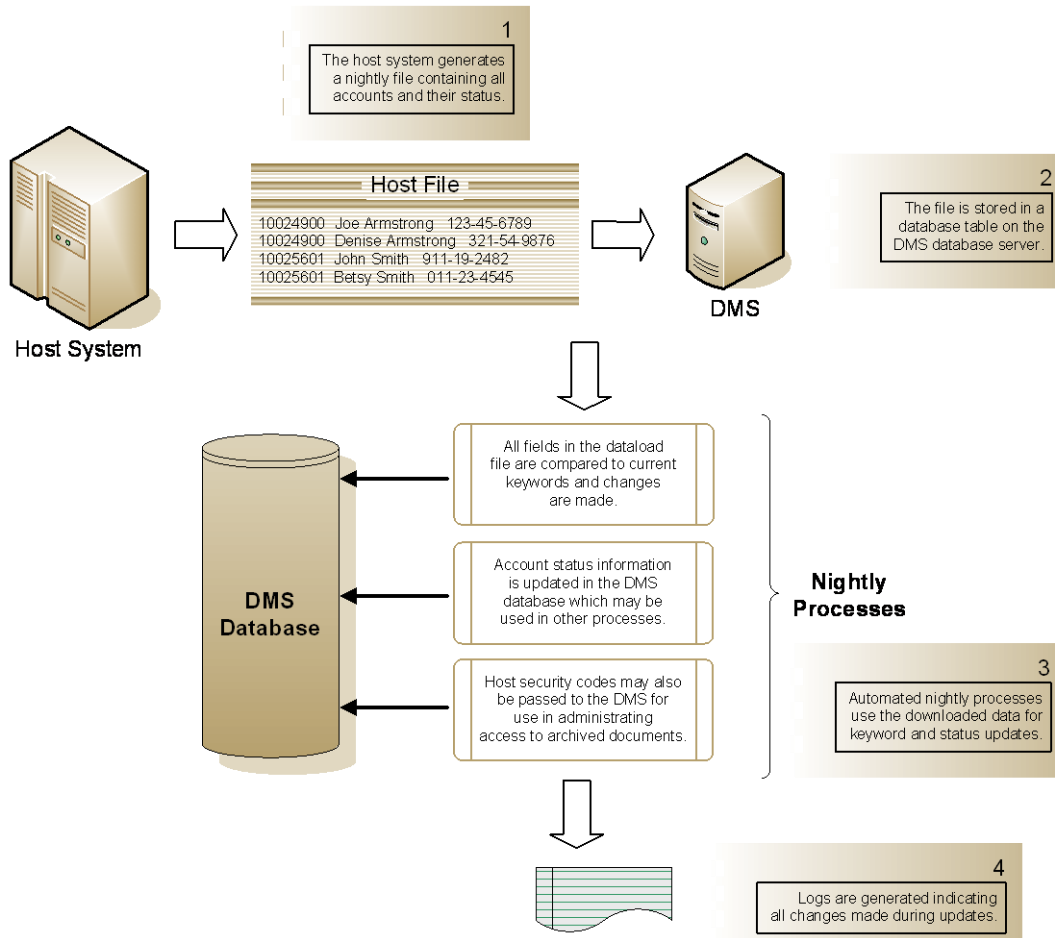
> **Autofill Update** – Requires synchronization of the Autofill customer information in OnBase with the customer information from the host. This process uses the OnBase AutoFill configuration to pull the appropriate information from the host generated customer information file to populate the appropriate OnBase database autofill tables.

> **Keyword Update** – Synchronizes or updates keyword information in OnBase with the corresponding customer information from the host.

The following diagram illustrates a logical flow of how changes are synchronized between the host and the OnBase system.

To accomplish this, a nightly data file is received from the host system containing all key customer information. This file is re-formatted, if necessary, and loaded into the Host Synchronization application for processing. This process replaces any existing customer information in the OnBase autofill and starts fresh each day. The new host data file is compared to existing data in the DMS system and changes are made

automatically as required. This process can be accomplished via automated "lights out" processing each night with no user interaction required. Changes are logged to provide an audit trail for later review.

Examples

Data Used for Examples 1 - 4

Table 1

| **myAutoFill** |
| Account# |
| Name |
| TIN/SSN |
| Member# |
| Pay Off Date |
| Employee Flag |

Table 2

| **myDocType (keywords assigned)** |
| Account# |
| Name |
| TIN/SSN |
| Member# |
| Pay Off Date |
| Employee Flag |
| Active Date |
| Expired Date |

Table 3 – Data in myAutoFill

12458798	George Washington	111223333	852369	03/21/2012	N
98745632	Grover Cleveland	222558888	74587458	05/30/2014	N
658932	James Madison	865547896	54896	11/28/2025	N
8745963	Benjamin Harrison	888995656	785423	05/30/2014	N

Example 1

Primary Keyword: Account#

Indexing:

While indexing the user enters the Account# of 98745632. The name, TIN/SSN, Member#, Pay Off Date and Employee Flag automatically populate. The Active Date and Expired Date are left blank from the auto fill process because they are not in the AutoFill table. The user keys in the Active Date (02/11/2011) and Expired Date (06/15/2012).

After HostSync Runs:

No data is changed because the information populated by the Autofill during indexing the previous day has stayed the same

Example 2

Primary Keyword: Account#

Expanding on Example 1 above, it's 7 years later. Mr. Cleveland has had a son and named him Grover Cleveland II and changed his own name to Grover Cleveland, SR. The information was changed on the Host last night and today when we review the document again, the name has been corrected. No other information had changed.

Updated myAutoFill information

98745632	Grover Cleveland, SR	222558888	74587458	05/30/2014	N

Example 3

Primary Keyword: Account#

Indexing:

Mr. Cleveland and Mr. Harrison are joining together on a joint venture and need a loan. They have submitted the loan document myDocType and each have opened an Account as of today. The information will be entered into the Host system tomorrow.

The indexer only has time to enter the Account# and Name information for each gentleman.

After HostSync runs the 1ˢᵗ Night:

When HostSync runs the first night, the information has not yet been entered in the Host. Since neither of the 2 accounts numbers exist in the Host file, no information is touched on the document

After HostSync runs the 2nd Night:

On the second day, the Host data entry staff had time to enter Mr. Cleveland's information the system, but did not have time to enter Mr. Harrison's information.

When HostSync runs the second night, the information for Mr. Cleveland is available but not Mr. Harrison's information.

The OnBase system does not tie the Name keyword to the Account# keyword or the TIN/SSN keyword. In OnBase all keywords are individual keywords. So the HostSync process clears all keywords in the AutoFill (Name, TIN/SSN, Member#, Pay Off Date and Employee Flag) and starts fresh. It will not remove the Account# fields since those are the Primary Keywords.

HostSync will populate all of Mr. Cleveland's information.

Add / Modify Keywords

myDocType
myDocType for GROVER CLEVELAND - 11/28/2011

Document Date 11/28/2011

Keywords

Account#	8745963
Account#	98745632
Name	GROVER CLEVELAND
TIN/SSN	222558888
Member#	74587458
Pay Off Date	05/30/2014
Employee Flag	N
Active Date	/ /
Expired Date	/ /

Save   Cancel

After HostSync runs the 3rd Night:

On the third day, the Host data entry staff had time to enter Mr. Harrison's information.

When HostSync runs the third night, both Mr. Cleveland and Mr. Harrison's information is available.

NOTE: The system does not put in duplicate values. Notice the Employee Flag and Pay Off Date are only on the document once.

Add / Modify Keywords

myDocType
myDocType for GROVER CLEVELAND - 11/28/2011

Document Date 11/28/2011

Keywords

Account#	8745963
Account#	98745632
Name	GROVER CLEVELAND
Name	BENJAMIN HARRISON
TIN/SSN	222558888
TIN/SSN	888995656
Member#	74587458
Member#	785423
Pay Off Date	05/30/2014
Employee Flag	N
Active Date	/ /
Expired Date	/ /

Save   Cancel

Example 4

Primary Keyword: Account#

Indexing:

Mr. Cleveland and Mr. Harrison are joining together on a joint venture and need a loan. They have submitted the loan document myDocType. The indexer enters both names and both SSN's. But only enters the Account# for Mr. Cleveland.	**Add / Modify Keywords** myDocType myDocType for GROVER CLEVELAND - 11/28/2011 Document Date 11/28/2011 Keywords Account# 98745632 Name GROVER CLEVELAND Name BENJAMIN HARRISON TIN/SSN 222558888 TIN/SSN 888995656 Member# Pay Off Date / / Employee Flag Active Date / / Expired Date / / Save Cancel

After HostSync:

Since keywords are individual, and the system does not know that some keywords are really associated with others, the system removes all keywords other than the primary that are associated with the AutoFill (Name, TIN/SSN, Member#, Pay Off Date and Employee Flag). In this case, all remnants of Mr. Harrison are gone because his Account# was not on the document. **NOTE:** If the TIN/SSN keyword had been the primary, then both gentlemen's information would be on the document because both gentleman had a TIN/SSN on the document before HostSync.	**Add / Modify Keywords** myDocType myDocType for GROVER CLEVELAND - 11/28/2011 Document Date 11/28/2011 Keywords Account# 98745632 Name GROVER CLEVELAND TIN/SSN 222558888 Member# 74587458 Pay Off Date 05/30/2014 Employee Flag N Active Date / / Expired Date / / Save Cancel

Example 5 - Alternate AutoFill

Primary Keyword: Member#

Configuration:

TIN Alt AF

TIN# (no dashes)
Member #
Name (ex. Smith John R)
Employee Flag

Entity AF

Member #
TIN# (no dashes)
Name (ex. Smith John R)
Account #
Employee Flag

myDocType (keywords assigned)

Member #
TIN# (no dashes)
Account #
Name (ex. Smith John R)

The **Entity AF** is assigned to the myDocType via OnBase Configuration. The **TIN Alt AF** is assigned to the myDocType via a HostSync configuration change.

If users are keying in information, and they key in the Member#, the rest of the data will auto fill using the CNS-Member# auto fill.

When HostSync runs at night, it will first try to populate keywords based on the TIN. Once that task is complete, HostSync will then go back and populate keywords based on the Member#.

This will help correct those documents which are imported and only have the TIN as a keyword.

Indexing:

1. On the first document, the Member# was entered, but then blanked out all the data fields except Member#
2. On the second document, only the TIN# was entered

Document Search Results

🔍 5yr Review Personal Line of Credit

5yr Review Personal Line of Credit for Member #   067 - - Acct # - 11/15/2011
5yr Review Personal Line of Credit for Member # - - Acct # - 11/15/2011

After HostSync:

HostSync runs the Alternate Autofill first then runs the primary autofill.

In this case, for the first document since no TIN# as entered, the Alternate autofill skipped this document. But the primary autofill (based on Member#) was used since there was a Member#.

On the second document, the Alternate autofill was used because there was a TIN# present.

NOTE: If the first document had a TIN# and a Member#, the Alternate autofill would have been used since it runs first. Then the primary autofill would have run to fill in based on the Member#.

If the Alternate autofill has different information from the primary autofill, the primary autofill goes last.

Using the example above, if the Name for the TIN# autofill is Joe Smith and the Name for the Member# autofill is Joseph Smith, the document will end up with Joseph Smith.