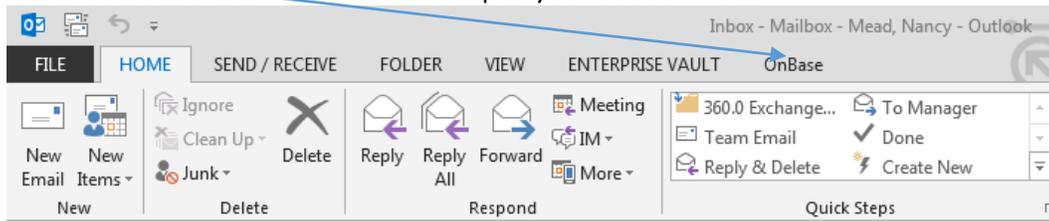


OnBase Outlook Integration – Claims Training Material

(Outlook 2013 replacement of FB Submit – does not impact Hyland Virtual Print to Onbase)

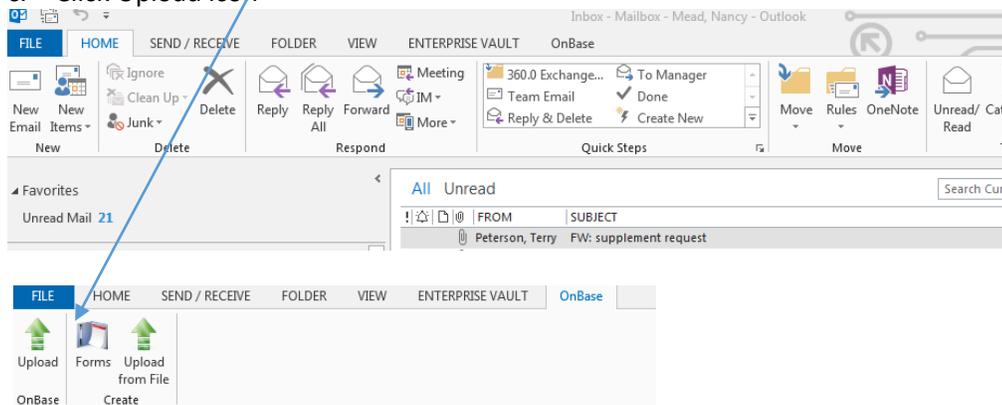
You should see the OnBase tab at the top of your Outlook ribbon.



1. Usage:

Inbox upload method:

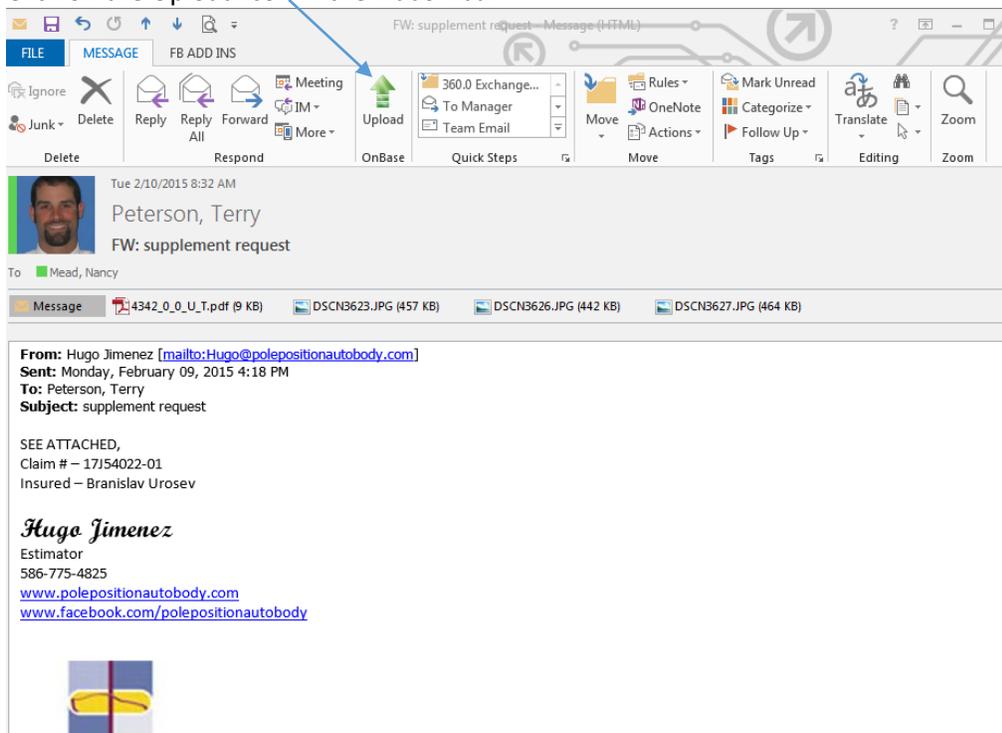
- a. Select email that needs to be uploaded to OnBase
- b. Click on the OnBase Tab, in the ribbon bar
- c. Click Upload icon



OR

Within email method:

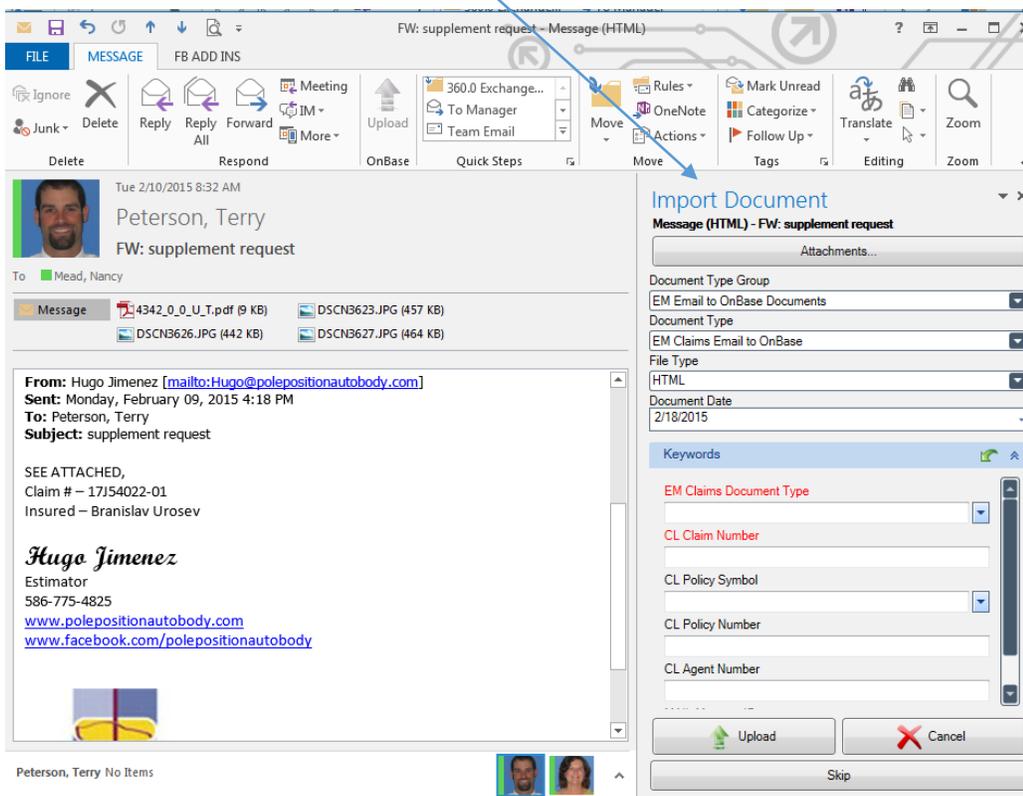
- a. Open email that needs to be uploaded to OnBase
- b. Click on the Upload icon in the ribbon bar



2. An OnBase splash screen may display. This means your network user account is being used to log you in automatically



3. You will now see an **Import Document** pane to the right of the email message.

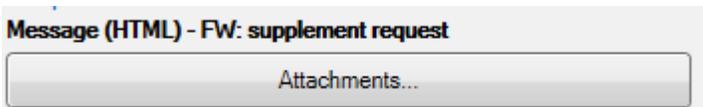


4. Components from top to bottom of pane:

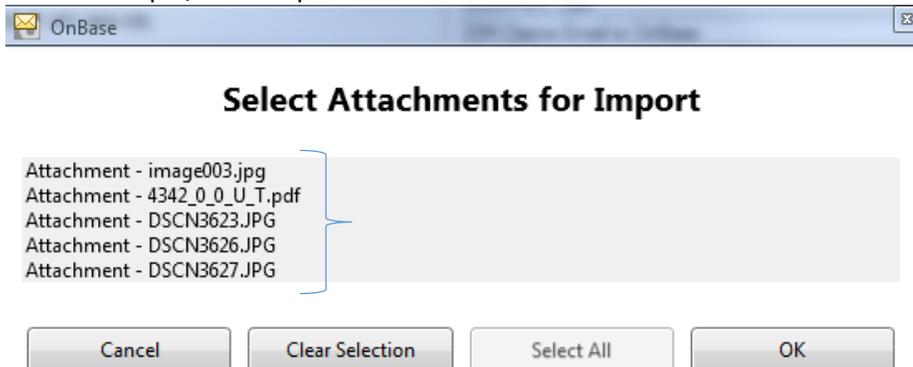
- a. Note that the item to index will appear separately. The first item is the message (HTML), as evidenced by the text above the **Attachments...** button, i.e. "**Message (HTML)**"



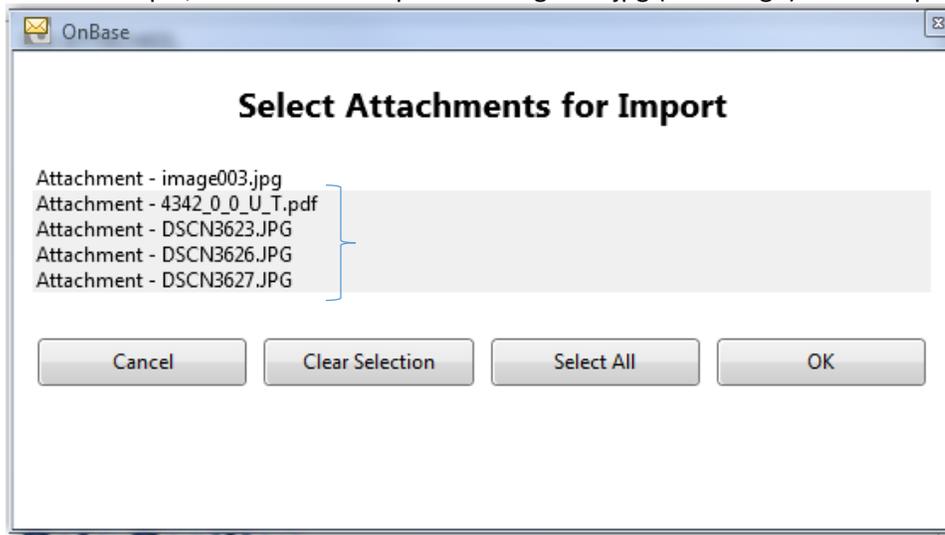
- b. By default your email and all attachments are selected for indexing. To change this, click the **Attachments** button and select or de-select as desired.



In this example, all will upload.



In this example, all but one will upload – image003.jpg (email logo) will not upload.



NOTE: Selecting with a mouse differs from the typical selection process in other Windows products. The Attachments box is set up so that it's easy to click on one file that you may want to de-select (for instance, a company logo).

- c. The **Document Type Group** and **Document Type** **MUST** be filled out as shown below:

Document Type Group
EM Email to OnBase Documents

Document Type
EM Claims Email to OnBase

- d. **File Type** should also prefill. While indexing the email itself (not attachments), **File Type** will default to HTML or Text format. As you index your attachments in upcoming steps, the attachments will default to their own format. Be careful not to change this unless you are sure of what you are changing.

File Type
HTML

- e. The **Document Date** defaults to Today.

Document Date
12/09/2014

- f. Fill in the **Keywords** panel next.

Keywords

EM Claims Document Type

CL Claim Number

CL Policy Symbol

CL Policy Number

CL Agent Number

MAIL MessageID
000000009FA1D471904BB5418DCF3C0E6ED5F2150700D17C

- g. **EM Claims Document Type**. Select from the list, depending on document type:

CL APPRAISAL NON-CCC
CL COPY OF TITLE
CL CORRESPONDENCE
CL ESTIMATE
CL ESTIMATE CLAIMANT
CL INDEPENDENT PDF
CL INVOICE
CL LETTER OF GUARANTEE
CL LIEN RELEASE PDF
CL MINI TORT
CL PHOTOS
CL PHOTOS CLAIMANT
CL POLICE REPORT
CL SUBRO DEMAND LETTER
CL SUPPLEMENT NON-CCC
CLM CORRESPONDENCE

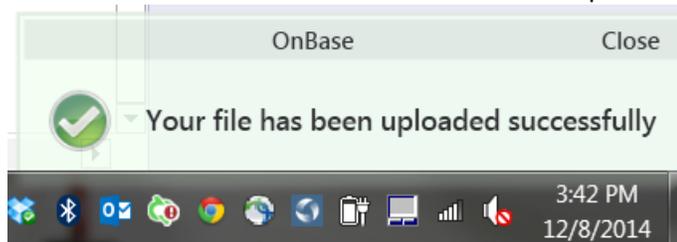
CLM CORRESPONDENCE ATTY
CLM CORRESPONDENCE EMAIL
CLM ESTIMATE/APPRaisal
CLM INV
CLM PHOTOS
IMS CLM MISCELLANEOUS
IMS MMU MISCELLANEOUS
MMU ATTY CORRESPONDENCE
MMU CORRESPONDENCE
MMU PHOTOS BRANCH
MMU PHOTOS MEDICAL
MMU PHOTOS WC
SIU CORRESPONDENCE

IMS will reindex and code documents individually.

IMS will reindex and code documents individually.

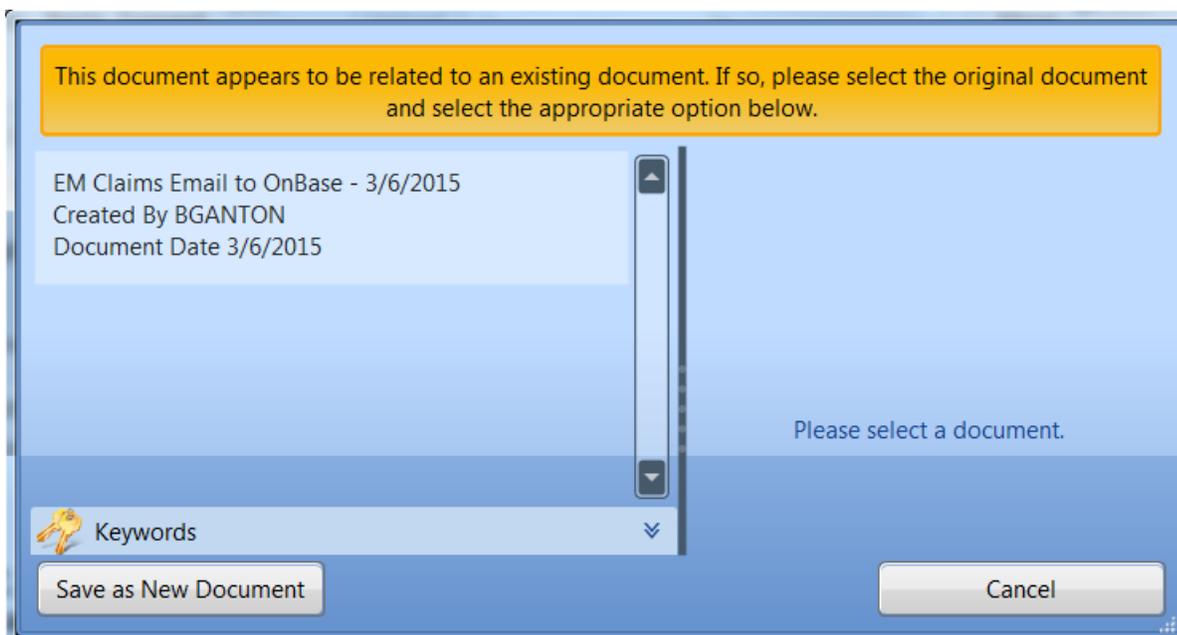
- h. **CL Claim Number** - Enter the 17J or entire 15 digit claim number, followed by TAB (blank not valid)
- i. **CL Policy Symbol, CL Policy Number** and **CL Agent number** should prefill, if an accurate claim number is entered
- j. **Mail Message ID** – No action needs to be taken for this. The Mail Message ID is a unique ID number associated with this email and all imported attachments.
Note: Mail Message ID number will display in document history for email and all attachments, and will be available for cross-reference feature.
- k. The buttons at the bottom include:
 - i. **Upload**: Click this to upload the current document. **IMPORTANT**: Once you click **Upload**, you will need to **change the Document Type** for the next attachment (if applicable). Again, the next Attachment type is indicated at the top of the Import Document window.

You will see this notification on each successful upload



- ii. **Cancel**: Click this button if you want to cancel the upload process at any stage.
- iii. **Skip**: If you want to skip the upload of any document type.
- iv. Apply to all attachments. Select this if all attachments will be of the same Document Type (i.e. all need to be indexed to CL Photos).

5. If multiple attachments of the same File Type are uploaded, you will see a separate box pop up, which will allow you to make each attachment a separate document in OnBase, or combine/Append into one.

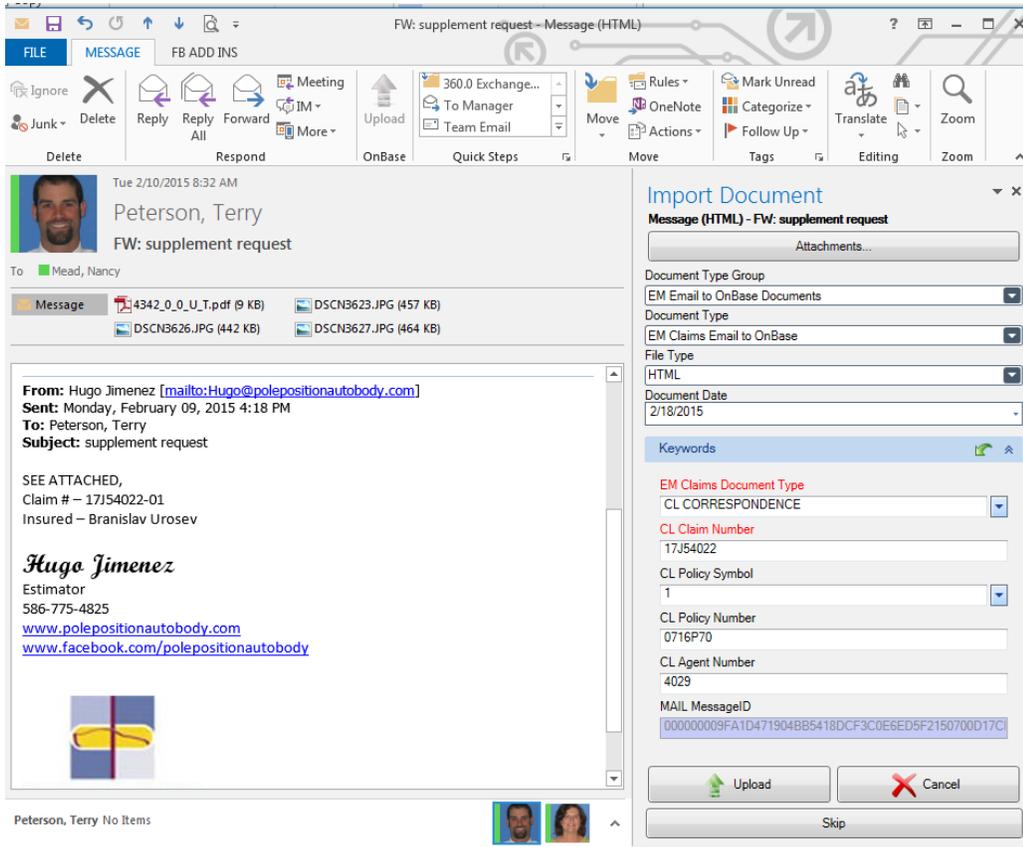


- Click on the button containing your user ID to continue. Then,
- a. Click Append Page(s) to compile each attachment into one OnBase document, or
 - b. Click Save as New Document, if you want each document to appear separately in OnBase

Once all uploads are complete, you will return to your original email message.

Other document submission types

Exhibit CL document submission



Selected all attachments except logo (image003.jpg) and clicked OK.

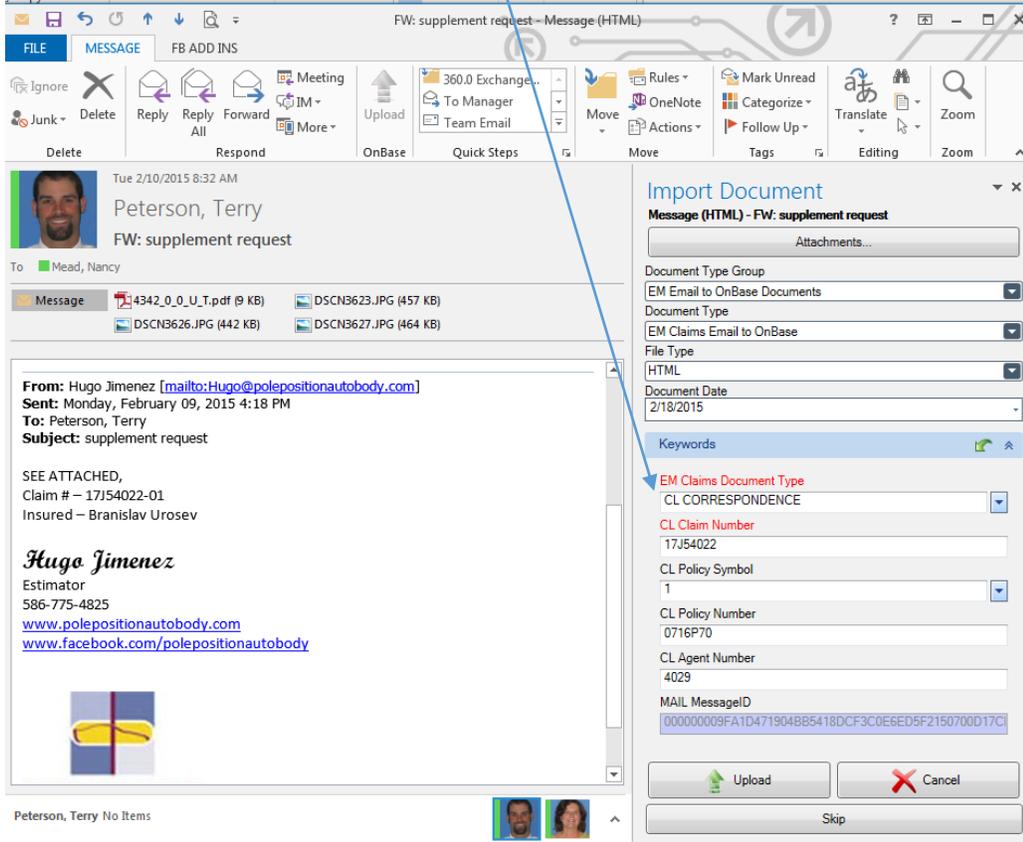


Select Attachments for Import

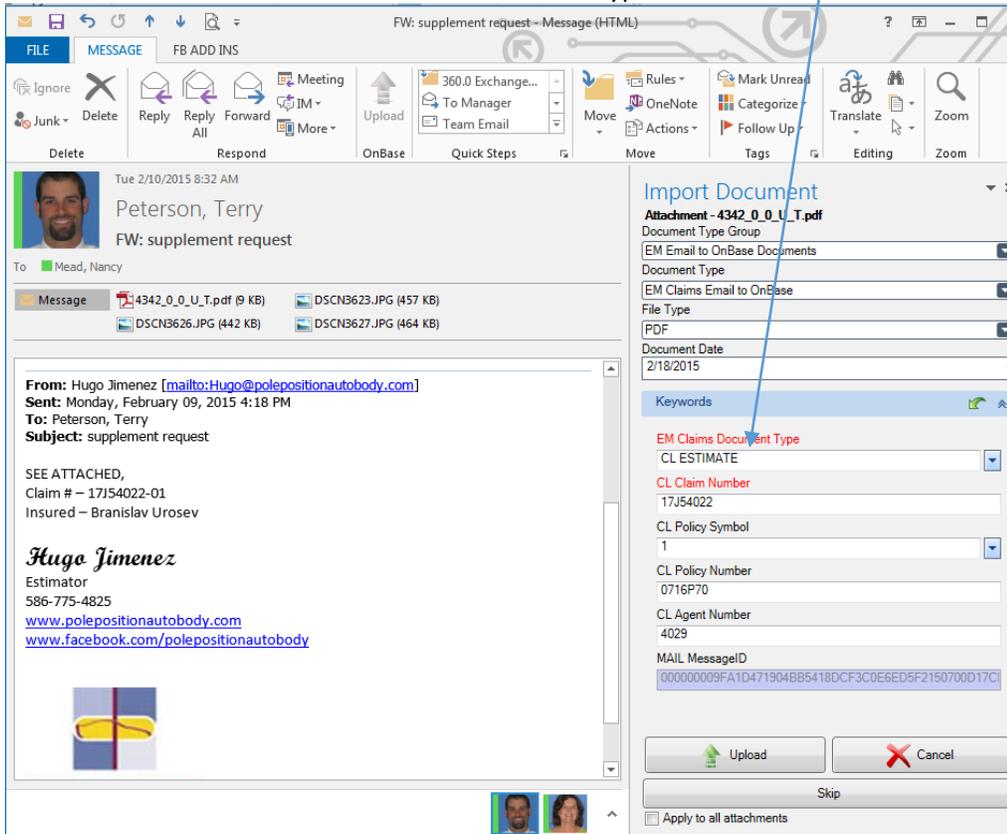
Attachment - image003.jpg
Attachment - 4342_0_0_U_T.pdf
Attachment - DSCN3623.JPG
Attachment - DSCN3626.JPG
Attachment - DSCN3627.JPG



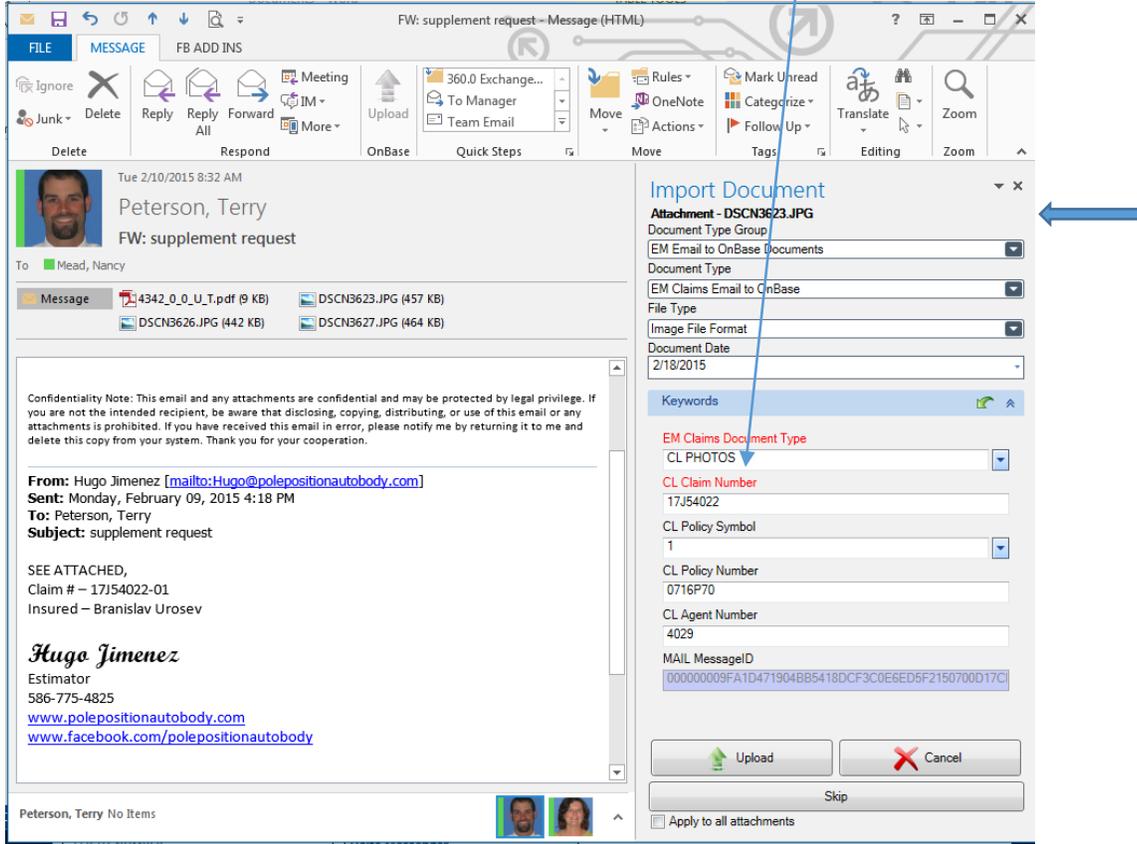
Selected Doc Type CL CORRESPONDENCE and clicked on Upload.
Email message (HTML) is being uploaded.



Next Attachment is labeled below – Selected Doc Type CL ESTIMATE and clicked on Upload.

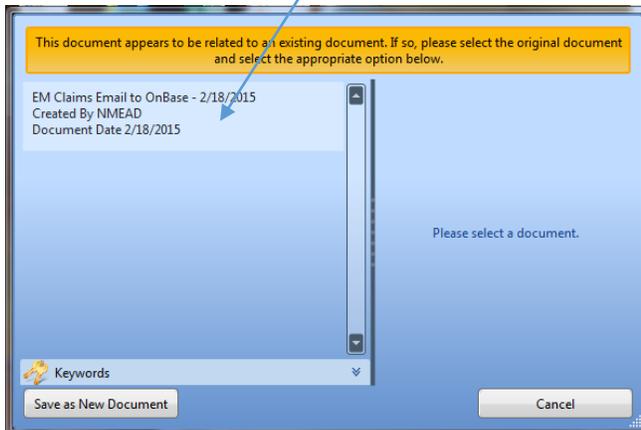


Next Attachment is labeled below – Selected Doc Type CL PHOTOS and Upload.
Upload will need to be repeated with each attachment.

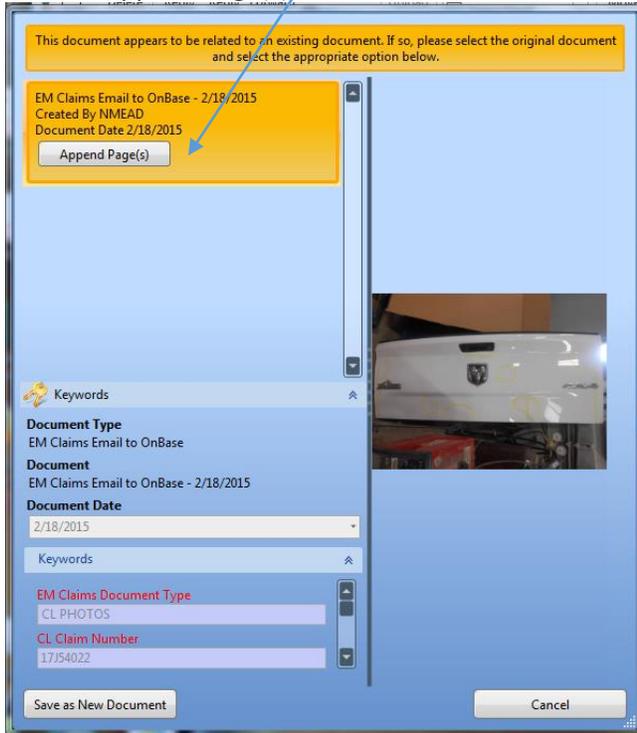


Attachments with similar file types will display pop up window for combining into one document (example CL PHOTOS).

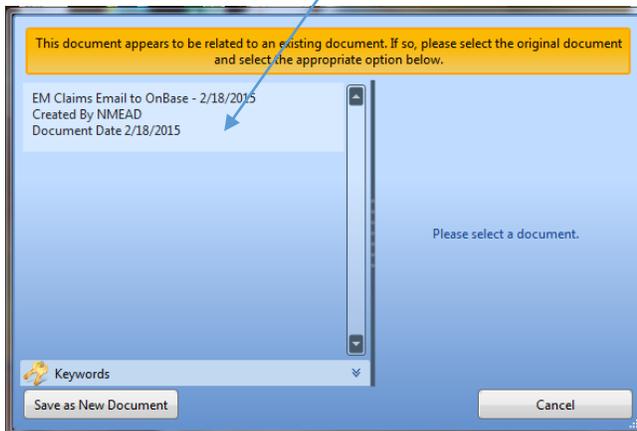
Click on document below



Click on Append Page(s)



Click on document below



Click on Append Page(s)

This document appears to be related to an existing document. If so, please select the original document and select the appropriate option below.

EM Claims Email to OnBase - 2/18/2015
Created By NMEAD
Document Date 2/18/2015

Append Page(s)

Keywords

Document Type
EM Claims Email to OnBase

Document
EM Claims Email to OnBase - 2/18/2015

Document Date
2/18/2015

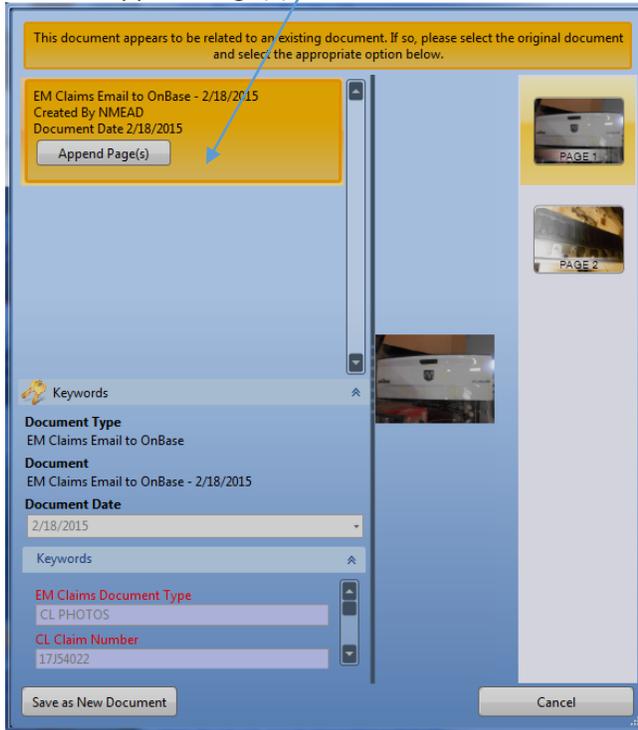
Keywords

EM Claims Document Type
CL PHOTOS

CL Claim Number
17J54022

Save as New Document

Cancel



Click on Append Page(s)

This document appears to be related to an existing document. If so, please select the original document and select the appropriate option below.

EM Claims Email to OnBase - 2/18/2015
Created By NMEAD
Document Date 2/18/2015

Append Page(s)

Keywords

Document Type
EM Claims Email to OnBase

Document
EM Claims Email to OnBase - 2/18/2015

Document Date
2/18/2015

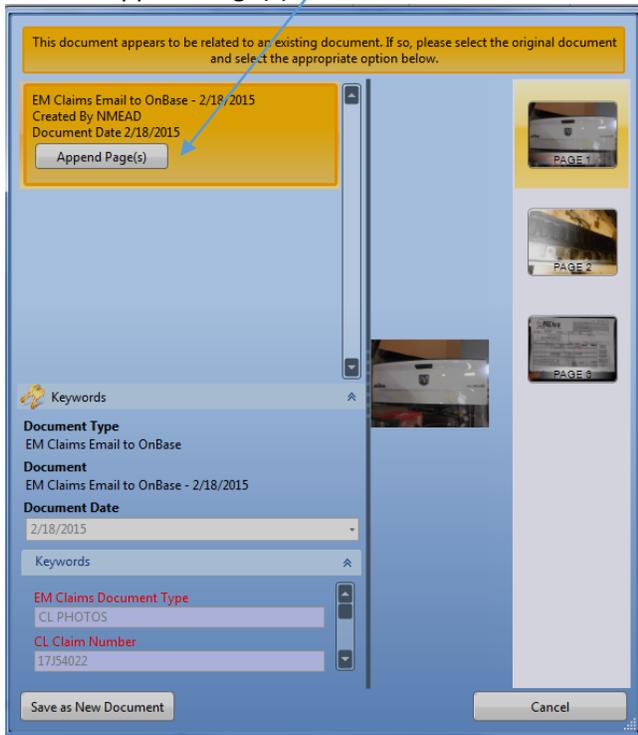
Keywords

EM Claims Document Type
CL PHOTOS

CL Claim Number
17J54022

Save as New Document

Cancel



Import document screen clears when last document is uploaded.

The screenshot shows an Outlook window titled "FW: supplement request - Message (HTML)". The ribbon includes "FILE" and "MESSAGE" tabs, with "FB ADD INS" visible. The ribbon contains various action buttons such as Ignore, Delete, Reply, Forward, Meeting, Upload, OnBase, Quick Steps, Move, Actions, Mark Unread, Categorize, Follow Up, Translate, and Zoom. The email header shows it was received on Tue 2/10/2015 at 8:32 AM from Terry Peterson. The recipient is Nancy Mead. The message body contains the following text:

From: Hugo Jimenez [<mailto:Hugo@polepositionautobody.com>]
Sent: Monday, February 09, 2015 4:18 PM
To: Peterson, Terry
Subject: supplement request

SEE ATTACHED,
Claim # - 17154022-01
Insured - Branislav Urosev

Hugo Jimenez
Estimator
586-775-4825
www.polepositionautobody.com
www.facebook.com/polepositionautobody

Below the text is the Pole Position logo, which features a stylized yellow and blue graphic above the text "Pole Position".

At the bottom of the window, the status bar shows "Peterson, Terry No Items" and two small profile pictures.

Exhibit IMS CLM MISCELLANEOUS document submission

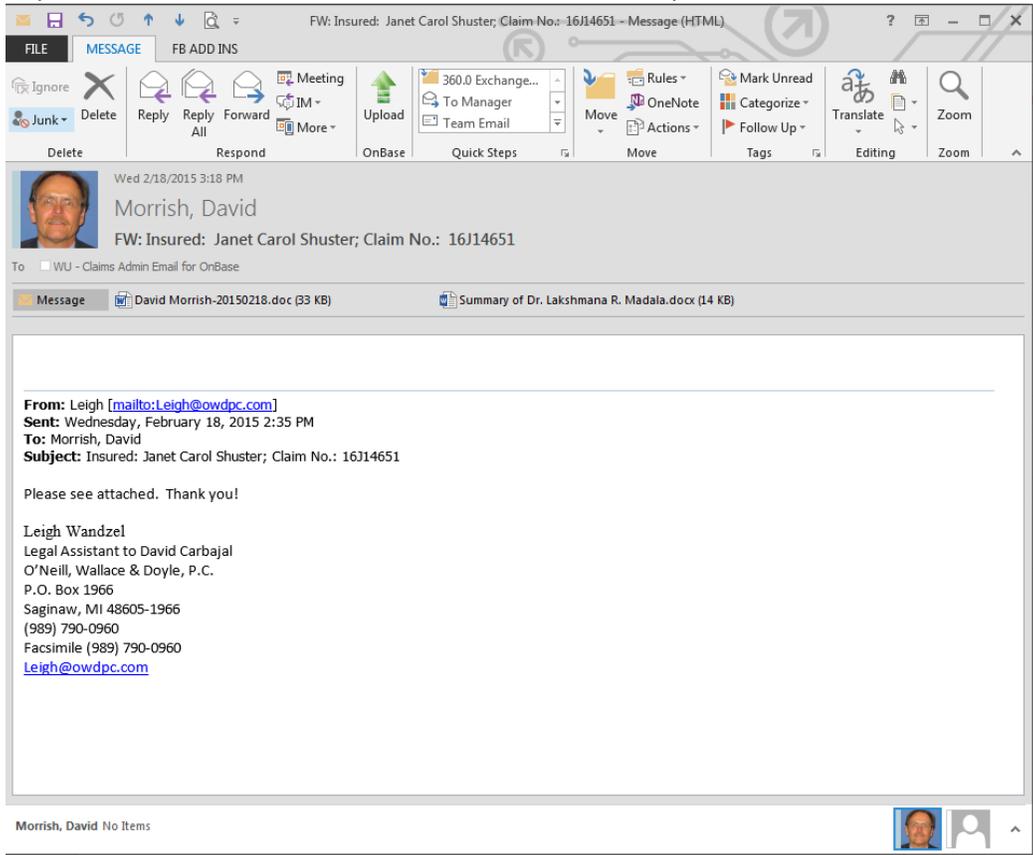
Email message is indexed with IMS CLM MISCELLANEOUS - click Upload.

The screenshot shows an Outlook window with an email from Leigh Wandzel to David Morrish. The email subject is "Insured: Janet Carol Shuster; Claim No.: 16J14651". The email body contains contact information for Leigh Wandzel. On the right side, the "Import Document" dialog box is open, showing the document type "EM Email to OnBase Documents" and "EM Claims Email to OnBase". The "Keywords" section is expanded, and the "EM Claims Document Type" is set to "IMS CLM MISCELLANEOUS". The "CL Claim Number" is "16J14651". The "Upload" button is highlighted.

Next Attachment is labeled below – Kept same Doc Type IMS CLM MISCELLANEOUS – Selected checkbox Apply to all attachments to keep same doc type for all attachments - click Upload.

The screenshot shows the same Outlook window as above, but with the "Import Document" dialog box open for the attachment "David Morrish-20150218.doc". The document type is now "MS Word Document". The "Keywords" section is expanded, and the "EM Claims Document Type" is set to "IMS CLM MISCELLANEOUS". The "CL Claim Number" is "16J14651". The "Apply to all attachments" checkbox is checked. The "Upload" button is highlighted.

Import document screen clears when last document is uploaded.



IMS department indexes IMS CLM MISCELLANEOUS email and attachments as:

CL Claim Number	Document Name	CL Description	Document Date
16J14651	CLM CORRESPONDENCE ATTY - 16J14651 - 2/19/2015 (24982924)		02/19/2015
16J14651	CLM RPT MEDICAL - 16J14651 - 2/19/2015 (24982925)		02/19/2015
16J14651	CLM CORRESPONDENCE E-MAIL - 16J14651 - 2/19/2015 (24982923)	EMAIL	02/19/2015

Unique message ID of email will show in history of the email and all the attachments.

02/19/2015	11:41:14	RHOLMES	Viewed Document	Viewed (24982923) 'CLM CORRESPONDENCE E-MAIL - 16J14651 - 2/19/2015 (24982923)'
02/19/2015	11:39:53	RHOLMES	Add Keyword	Added Keyword (CL Document Class) 'REPORT' from 'CLM CORRESPONDENCE E-MAIL - 16J14651 - 2/19/2015 (24982923)'
02/19/2015	11:39:41	RHOLMES	Add Keyword	Added Keyword (CL New Mail) '1' from 'IMS CLM MISCELLANEOUS - 16J14651 - 2/19/2015 (24982923)'
02/19/2015	11:39:41	RHOLMES	Document Re-Indexed	Document (24982923) re-indexed to CLM CORRESPONDENCE E-MAIL
02/19/2015	11:38:57	RHOLMES	Viewed Document	Viewed (24982923) 'IMS CLM MISCELLANEOUS - 16J14651 - 2/19/2015 (24982923)'
02/19/2015	11:38:43	RHOLMES	Viewed Document	Viewed (24982923) 'IMS CLM MISCELLANEOUS - 16J14651 - 2/19/2015 (24982923)'
02/19/2015	08:48:39	OBTIMER1	Created Document	Created (24982923) 'IMS CLM MISCELLANEOUS - 16J14651 - 2/19/2015 (24982923)'
02/19/2015	08:48:39	OBTIMER1	Add Keyword	Added Keyword (Document Handle) '24982923' from 'IMS CLM MISCELLANEOUS - 16J14651 - 2/19/2015 (24982923)'
02/19/2015	08:48:39	OBTIMER1	Add Keyword	Added Keyword (CL Claim Number) '16J14651' from 'IMS CLM MISCELLANEOUS - 16J14651 - 2/19/2015 (24982923)'
02/19/2015	08:48:39	OBTIMER1	Add Keyword	Added Keyword (MAIL MessageID) '000000040D82A6157BD0A4482291420A19438360700E8619F656BD63042971C11339CDE674F024A930BEBF...'

Cross reference feature will bring up all documents with same message id as long as document types are the same as the document types listed in EM Class Document Type drop down.



To view cross reference, open one of the documents and click on  Run All Cross Reference icon.

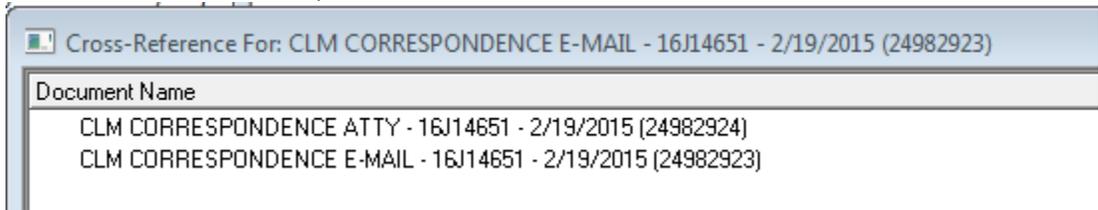


Exhibit IMS MMU MISCELLANEOUS document submission

Email message is indexed with IMS MISCELLANEOUS MMU - click Upload.

Thu 2/26/2015 6:54 PM
Hawkins, Tiffany
FW: 15J24795, Nancy Murray - INVOICE - \$525.00 FACILITATOR FEE

To: WU - Claims Admin Email for OnBase

Message INV \$525 Facilitator Fee our share.docx (85 KB)

From: Marilynn O'Mell [mailto:momell@email.schwartzlawfirm.com]
Sent: Wednesday, February 25, 2015 5:29 PM
To: Hawkins, Tiffany
Subject: 15J24795, Nancy Murray - INVOICE - \$525.00 FACILITATOR FEE

Ms. Hawkins,

Attached please find an Invoice in the amount of \$525.00 from Suzanne C. Stanczyk, PLLC, our share of her facilitation fee, which we ask that you place in line for direct payment. Thank you.

Marilynn O'Mell
Legal Assistant to Susan L. Brown
Schwartz Law Firm, P.C.
37887 W. 12 Mile Road, Suite A
Farmington Hills, MI 48331
248-553-9400/9107 Fax
momell@schwartzlawfirm.com

The information contained in this electronic message is subject to the attorney client privilege and is confidential information intended exclusively for the use of the individual or entity named above. If the reader of this message is not the intended recipient

Hawkins, Tiffany No Items

Import Document
Message (HTML) - FW: 15J24795, Nancy Murray - INVOICE - \$525.00 FACILITATOR FEE

Attachments...

Document Type Group: EM Email to OnBase Documents
Document Type: EM Claims Email to OnBase
File Type: HTML
Document Date: 3/5/2015

Keywords

EM Claims Document Type
IMS MISCELLANEOUS MMU

CL Claim Number: 15J24795
CL Policy Symbol: 1
CL Policy Number: 0200T65
CL Agent Number: 4506
MAIL MessageID: 000000040D82A6157BD0A4482291420A19438

Upload Cancel

Skip

Next Attachment is labeled below – Kept same Doc Type IMS MISCELLANEOUS MMU – Selected checkbox Apply to all attachments to keep same doc type - click Upload.

Thu 2/26/2015 6:54 PM
Hawkins, Tiffany
FW: 15J24795, Nancy Murray - INVOICE - \$525.00 FACILITATOR FEE

To: WU - Claims Admin Email for OnBase

Message INV \$525 Facilitator Fee our share.docx (85 KB)

From: Marilynn O'Mell [mailto:momell@email.schwartzlawfirm.com]
Sent: Wednesday, February 25, 2015 5:29 PM
To: Hawkins, Tiffany
Subject: 15J24795, Nancy Murray - INVOICE - \$525.00 FACILITATOR FEE

Ms. Hawkins,

Attached please find an Invoice in the amount of \$525.00 from Suzanne C. Stanczyk, PLLC, our share of her facilitation fee, which we ask that you place in line for direct payment. Thank you.

Marilynn O'Mell
Legal Assistant to Susan L. Brown
Schwartz Law Firm, P.C.
37887 W. 12 Mile Road, Suite A
Farmington Hills, MI 48331
248-553-9400/9107 Fax
momell@schwartzlawfirm.com

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Hawkins, Tiffany No Items

Import Document
Attachment - INV \$525 Facilitator Fee our share.docx

Document Type Group: EM Email to OnBase Documents
Document Type: EM Claims Email to OnBase
File Type: MS Word Document
Document Date: 3/5/2015

Keywords

EM Claims Document Type
IMS MISCELLANEOUS MMU

CL Claim Number: 15J24795
CL Policy Symbol: 1
CL Policy Number: 0200T65
CL Agent Number: 4506
MAIL MessageID: 000000040D82A6157BD0A4482291420A19438

Upload Cancel

Skip

Apply to all attachments

Import document screen clears when last document is uploaded.

The screenshot shows an Outlook window with the following details:

- Subject:** FW: 15J24795, Nancy Murray - INVOICE - \$525.00 FACILITATOR FEE - Message (HTML)
- Sender:** Hawkins, Tiffany (received Thu 2/26/2015 6:54 PM)
- To:** WU - Claims Admin Email for OnBase
- Attachment:** INV \$525 Facilitator Fee our share.docx (35 KB)
- Message Content:**

From: Marilynn O'Mell [<mailto:momell@email.schwartzlawfirm.com>]
Sent: Wednesday, February 25, 2015 5:29 PM
To: Hawkins, Tiffany
Subject: 15J24795, Nancy Murray - INVOICE - \$525.00 FACILITATOR FEE

Ms. Hawkins,

Attached please find an Invoice in the amount of \$525.00 from Suzanne C. Stanczyk, PLLC, our share of her facilitation fee, which we ask that you place in line for direct payment. Thank you.

Marilynn O'Mell
Legal Assistant to Susan L. Brown
Schwartz Law Firm, P.C.
37887 W. 12 Mile Road, Suite A
Farmington Hills, MI 48331
248-553-9400/9107 Fax
momell@schwartzlawfirm.com

The information contained in this electronic message is subject to the attorney client privilege and is confidential information intended exclusively for the use of the individual or entity named above. If the reader of this message is not the intended recipient or the employee or agent responsible to deliver it to the recipient,

Please note that MMU invoices cannot be processed in onbase as pdf – they error out in repricing queue. PDF MMU invoices should be faxed or scanned from paper copy for submission to Onbase.

Document types with the following types of file attachments cannot be imported and viewed successfully in Onbase:

- a. .esx
- b. .db
- c. .zip

Zip attachments must be opened before submission and sent on a separate email.

FW: Basement - Message (HTML)

FILE MESSAGE FB ADD INS

Ignore Delete Reply Reply All Forward IM More OnBase Upload 360.0 Exchange... To Manager Team Email Move OneNote Actions Mark Unread Categorize Follow Up Translate Zoom

Mon 2/23/2015 9:25 AM
Groh, Patricia
FW: Basement

To Mead, Nancy

Message pdf304.pdf (5 MB) Tessmer Basement.zip (2 MB)

This one didn't ask me to separately upload the items. The zip file contains photos.

Patty Groh, AINS
Inside Claim Representative | Farm Bureau Insurance
P.O. Box 30100 | Lansing, MI 48909
P: 517-679-5263 | F: 877-822-4662

Confidentiality Note: This email and any attachments are confidential and may be protected by legal privilege. If you are not the intended recipient, be aware that disclosing, copying, distributing, or use of this email or any attachments is prohibited. If you have received this email in error, please notify me by returning it to me and delete this copy from your system. Thank you for your cooperation.

From: Sarah Hitsman [mailto:sacifuen@gmail.com]
Sent: Thursday, February 19, 2015 11:25 AM
To: Groh, Patricia
Subject: Fwd: Basement

Groh, Patricia No Items

Photos from zip file - Message (HTML)

FILE MESSAGE FB ADD INS

Ignore Delete Reply Reply All Forward IM More OnBase Upload 360.0 Exchange... To Manager Team Email Move OneNote Actions Mark Unread Categorize Follow Up Translate Zoom

Mon 2/23/2015 1:38 PM
Mead, Nancy
Photos from zip file

To Mead, Nancy

Message Cleanup Before Aarons.jpg (78 KB) Current1.jpg (24 KB)
Current2.jpg (35 KB) Current3.jpg (39 KB)
Current4.jpg (23 KB) Dehumidifier.jpg (34 KB)
Fan1.jpg (53 KB) Fan2.jpg (47 KB)

Zip attachments must be opened before submission and sent on a separate email.

Nancy Mead, AIC
Claims System Analyst | Farm Bureau Insurance
PO Box 30100 | Lansing, MI 48909
P: 517-323-6753 | F: 517-323-6546

Confidentiality Note: This email and any attachments are confidential and may be protected by legal privilege. If you are not the intended recipient, be aware that disclosing, copying, distributing, or use of this email or any attachments is prohibited. If you have received this email in error, please notify me by returning it to me and delete this copy from your system. Thank you for your cooperation.

Nancy Mead No Items

Import Document

Attachment - Cleanup Before Aarons.jpg

Document Type Group
EM Email to OnBase Documents

Document Type
EM Claims Email to OnBase

File Type
Image File Format

Document Date
2/23/2015

Keywords

EM Claims Document Type
CLM PHOTOS

CL Claim Number
0010000409610A

CL Policy Symbol
S

CL Policy Number
2918618

CL Agent Number
4401

Upload Cancel

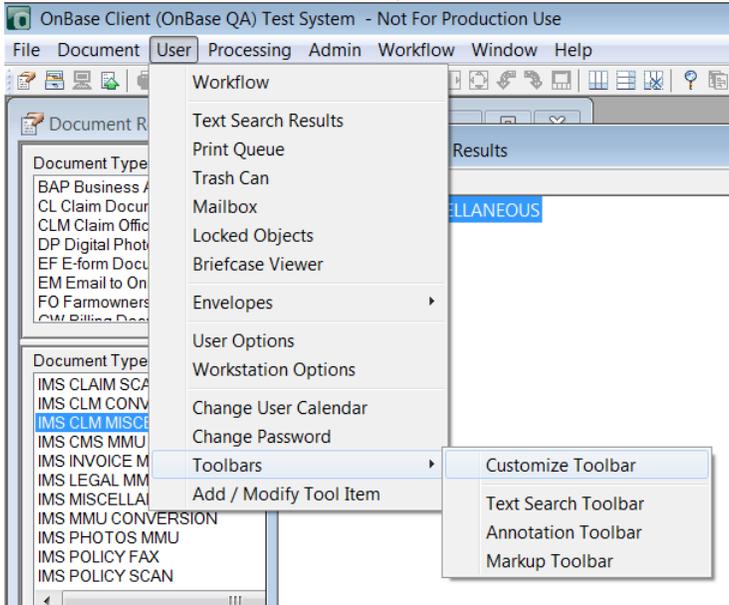
Skip

Apply to all attachments

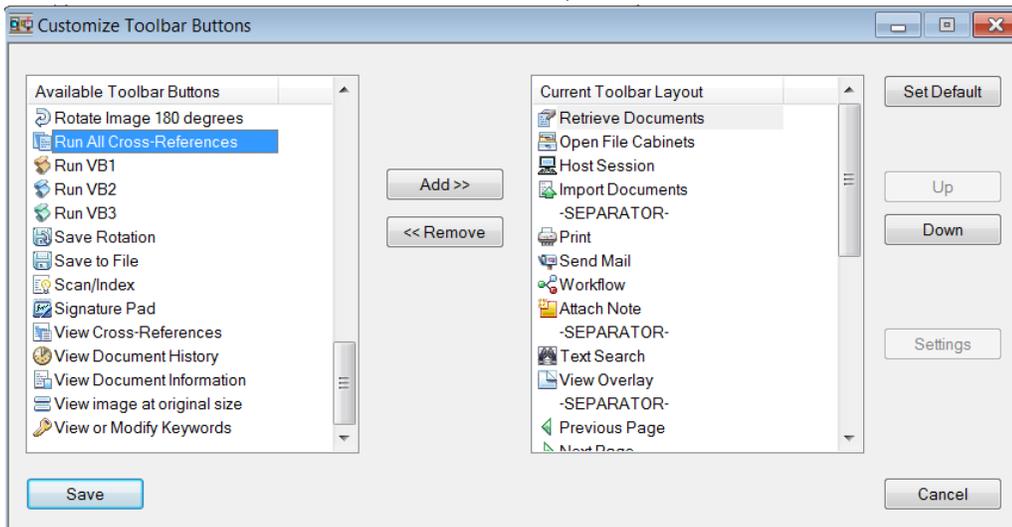
Outlook Integration: Cross References

Summary: In order to pull up a single view showing related email and attachments, you can add a toolbar button that will open a new window with all of the related items. This feature in OnBase is called Cross References. A relationship has been configured within OnBase for these documents using Outlook's unique number assigned to email and attachments: MAIL MessageID.

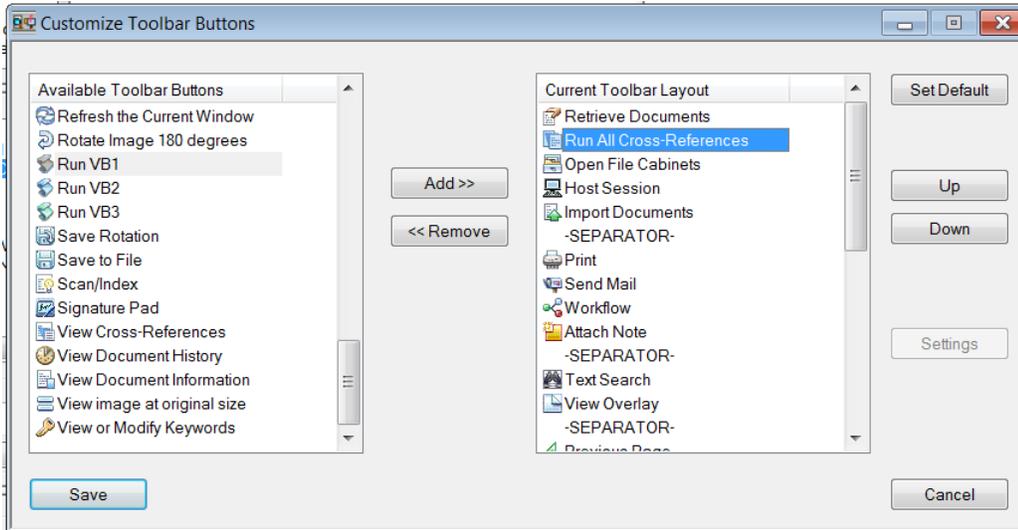
1. In the OnBase Client, use the dropdown User->Toolbars->Customize Toolbar



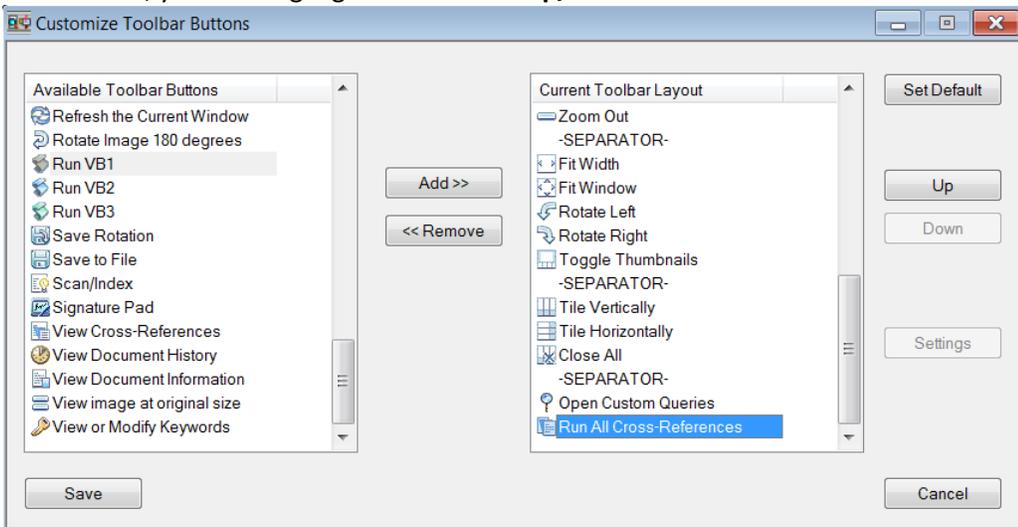
2. Within the **Customize Toolbar Buttons** window, find **Run All Cross-References** in the left pane.



3. Highlight and click Add so it shows up in the right pane.



4. Once added, you click highlight and use the **Up/Down** buttons to move it to the end of the toolbar.



5. Click Save when done.
6. Now you will notice a new button on your toolbar next to the **Open Custom Queries** magnifying glass button.



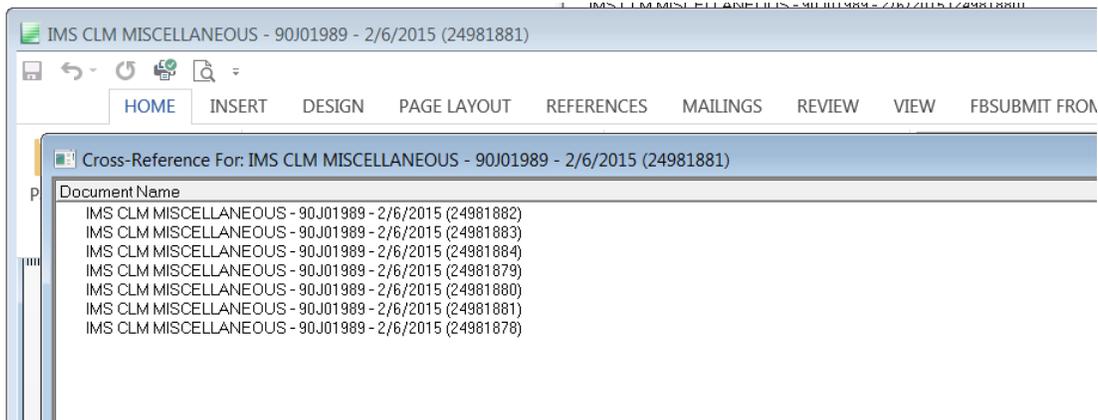
Open Custom Queries:



Run All Cross-References:



7. In order to use the **Run All Cross-References** button, you must have already performed your search, then opened up a document with other references. Once you have opened up the document, the button will show enabled. Click button to show the new **Cross-References** window.



8. Double-click each document to open and view.
Cross reference feature will currently display all documents with same message id as long as document types are the same as the document types listed in EM Class Document Type drop down.

EM Claims Document Types

- CL APPRAISAL NON-CCC
- CL COPY OF TITLE
- CL CORRESPONDENCE
- CL ESTIMATE
- CL ESTIMATE CLAIMANT
- CL INDEPENDENT PDF
- CL INVOICE
- CL LETTER OF GUARANTEE
- CL LIEN RELEASE PDF
- CL MINI TORT
- CL PHOTOS
- CL PHOTOS CLAIMANT
- CL POLICE REPORT
- CL SUBRO DEMAND LETTER
- CL SUPPLEMENT NON-CCC
- CLM CORRESPONDENCE
- CLM CORRESPONDENCE ATTY
- CLM CORRESPONDENCE EMAIL
- CLM ESTIMATE/APPRaisal
- CLM INV
- CLM PHOTOS
- IMS CLM MISCELLANEOUS
- IMS MMU MISCELLANEOUS
- MMU ATTY CORRESPONDENCE
- MMU CORRESPONDENCE
- MMU PHOTOS BRANCH
- MMU PHOTOS MEDICAL
- MMU PHOTOS WC
- SIU CORRESPONDENCE