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



<mark>OR</mark>

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.

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Reply I	Reply Forward All	Upload	Move	Rules + Mark Unread OneNote Categorize + Actions + Follow Up +	Translate
Delete	Respond	OnBase Quick Steps	ra N	Move Tags 🗔	Editing Zoom 🛧
Tue 2/10/201 Petersc FW: suppl	^{5 8:32 ам} on, Terry lement request			Import Document Message (HTML) - FW: supplem Attack	▼ × ent request iments
To Mead, Nancy				Document Type Group	
Message 🔂 4342_0_0	U_T.pdf (9 KB) 🔛 DSCN3	623.JPG (457 KB)		EM Email to OnBase Documents	
DSCN362	26.JPG (442 KB) SCN3	627.JPG (464 KB)		Document Type	
				EM Claims Email to OnBase	
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Sent: Monday, February (nito:Hugo@polepositionauto 09 2015 4·18 PM	bbody.com		Document Date	
To: Peterson, Terry	00,2010 110114			2/18/2015	•
Subject: supplement requ	uest				
SEE ATTACHED,				Keywords	* 1
Claim # - 17J54022-01				EM Claims Document Type	
Insured – Branislav Urose	ev			CL Claim Number	
Estimator				CL Policy Symbol	
586-775-4825					
www.polepositionautob	ody.com			CL Policy Number	
www.facebook.com/pol	lepositionautobody				
				CL Agent Number	
			•	Upload	Cancel
Peterson, Terry No Items			<u>^</u>	5	Gkip

4. Components from top to bottom of pane:

Me

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)**"

Import Document
Message (HTML) - FW: supplement request

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.

age (HTML) - FW: supple Atta	ment request		
In this example, all w	vill upload.		
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Se	elect Attachn	nents for Impo	rt
Attachment - image003.jp Attachment - 4342_0_0_U Attachment - DSCN3623.J Attachment - DSCN3626.J Attachment - DSCN3627.J	rg _T.pdf PG PG PG		

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

OnBase 🔳
Select Attachments for Import
Attachment - image003.jpg Attachment - 4342_0_0_U_T.pdf Attachment - DSCN3623.JPG Attachment - DSCN3626.JPG Attachment - DSCN3627.JPG
Cancel Clear Selection Select All OK

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. Believ Darahal	
	-
CL Policy Number	
CL Agent Number	
MAIL MessageID	
00000009FA1D471904BB5418DCF3C0E6ED5F215070	0D17Cl

- 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 IMS MMU MISCELLANEOUS IMS Will reindex and code documents individually. IMS WILL REINDERSENT CORRESPONDENCE

- 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 us 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.

This document appears to be related to an exist and select the a	ing document. If so, please select the original document opropriate option below.
EM Claims Email to OnBase - 3/6/2015 Created By BGANTON Document Date 3/6/2015	
Reywords	▼
Save as New Document	Cancel

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 - DSCN3625.JPG		
Attachment - DSCN3627.JPG		
Cancel Clear Selection	Select All	OK
Clear Selection	Select All	UK

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

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

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SCN3626.JPG (442 KB)	B627.JPG (464 KB)	PDF
		Document Date
From: Hugo Jimenez [malito:Hugo@polepositionau Sent: Monday, February 09, 2015 4:18 PM To: Peterson, Terry Subject: supplement request SEE ATTACHED, Claim # – 17J54022-01 Insured – Branislav Urosev Hugo Jimenez Estimator 586-775-4825 www.polepositionautobody.com www.facebook.com/polepositionautobody	obody.com]	Keywords Image: Constraint Type EM Claims Dockil Ent Type Image: Claim Number CL ESTIMATE Image: Claim Number 17354022 Image: Claim Number 1 Image: Claim Number 1 Image: Claim Number 1016970 Image: Claim Number CL Agent Number Image: Claim Number 4029 MAIL MessageID 1000000009FA1D471904BB5418DCF3C0E6ED5F2150700D17Cl
		Skip
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Next Attachment is labeled below – Selected Doc Type CL PHOTOS and Upload. Upload will need to be repeated with each attachment.

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Sent: Monday, To: Peterson T	February 09, 2015 4:18 F	M			17 15 4000			
	city .				17354022			
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Attachments with similar file types will display pop up window for combining into one document (example CL PHOTOS).

Click on document below

This document appears to be related to an exist and select the a	ing document. If so, please select the original document ppropriate option below.
EM Claims Email to OnBase - 2/18/2015 Created By NMEAD Document Date 2/18/2015	8
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Click on Append Page(s)

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Import document screen clears when last document is uploaded.



Exhibit IMS CLM MISCELLANEOUS document submission

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

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FILE MESSAGE FB ADD INS	(R) °				·	_//
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To WU - Claims Admin Email for OnBase				Attach	nments	
			Document Type	Group		
Message David Morrish-20150218.doc (33 KB)			EM Email to O	nBase Documents		
💼 Summary of Dr. Lakshmana R. Madala.	locx (14 KB)		Document Type	•		
			EM Claims Em	ail to OnBase		
			File Type			
			HIML Desument Date			
			2/19/2015	,		•
From: Leigh [mailto:Leigh@owdpc.com]						
To: Morrish. David			Keywords			(
Subject: Insured: Janet Carol Shuster; Claim No.: 1	6J14651					
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Please see attached. Thank you!			IMS CLM M	ISCELLANEOUS		
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P.O. Box 1966			1			-
Saginaw, MI 48605-1966			CL Policy Nu	umber		
(989) 790-0960			0606P32			
Facsimile (989) 790-0960			CL Agent Nu	ımber		
Leigh@owdpc.com			3956			
			MAIL Messa	gelD		
			000000040	0D82A6157BD0A44	482291420A194383	360700E8619F
				Upload		Cancel
Morrish, David No Items		^		2	Skip	

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.



Import document screen clears when last document is uploaded.

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1201	Morrish, Dav	rid								
	FW: Insured: Jan	et Carol Shuster	; Claim l	No.: 16J14651						
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Message	David Morrish-2015	50218.doc (33 KB)		Summary of Dr	Lakshmana	R. Madala.docx (1	4 KB)			
From: Leigh	mailto:Leigh@owdpo	c.com]								
To: Morrish, I	oay, February 18, 2 David	015 2:35 PM								
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Please see at	tached. Thank you!									
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Legal Assistar	t to David Carbaial									
O'Neill, Walla	ce & Doyle, P.C.									
P.O. Box 1966										
(989) 790-096	1999-1999									
Facsimile (98	9) 790-0960									
Leigh@owdp	<u>c.com</u>									
Morrish, David N	o Items									^

IMS department indexes IMS CLM MISCELLANEOUS email and attachments as:

J	umber			
	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.

	•	•			•
I	02/19/2015	11:41:14	RHOLMES	Viewed Document	Viewed (24982923) 'CLM CORRESPONDENCE E-MAIL - 16J14651 - 2/19/2015 (24982923)'
I	02/19/2015	11:39:53	RHOLMES	Add Keyword	Added Keyword (CL Document Class) 'REPORT' from 'CLM CORRESPONDENCE E-MAIL - 16/14651 - 2/19/2015 (24982923)'
I	02/19/2015	11:39:41	RHOLMES	Add Keyword	Added Keyword (CL New Mail) '1' from 'IMS CLM MISCELLANEOUS - 16J14651 - 2/19/2015 (24982923)'
I	02/19/2015	11:39:41	RHOLMES	Document Re-Indexed	Document (24982923) re-indexed to CLM CORRESPONDENCE E-MAIL
I	02/19/2015	11:38:57	RHOLMES	Viewed Document	Viewed (24982923) 'IMS CLM MISCELLANEOUS - 16J14651 - 2/19/2015 (24982923)'
I	02/19/2015	11:38:43	RHOLMES	Viewed Document	Viewed (24982923) 'IMS CLM MISCELLANEOUS - 16J14651 - 2/19/2015 (24982923)'
I	02/19/2015	08:48:39	OBTIMER1	Created Document	Created (24982923) 'IMS CLM MISCELLANEOUS - 16J14651 - 2/19/2015 (24982923)'
I	02/19/2015	08:48:39	OBTIMER1	Add Keyword	Added Keyword (Document Handle) '24982923' from 'IMS CLM MISCELLANEOUS - 2/19/2015 (24982923)'
I	02/19/2015	08:48:39	OBTIMER1	Add Keyword	Added Keyword (CL Claim Number) '16J14651' from 'IMS CLM MISCELLANEOUS - 2/19/2015 (24982923)'
1	02/19/2015	08:48:39	OBTIMER1	Add Keyword	Added Keyword (MAIL MessageID) '0000000040D82A6157BD0A4482291420A19438360700E8619F656BD63042971C11339CDE674F024A930BEBF

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.

Cross-Reference For: CLM CORRESPONDENCE E-MAIL - 16J14651 - 2/19/2015 (24982923)

Document Name

CLM CORRESPONDENCE ATTY - 16J14651 - 2/19/2015 (24982924) CLM CORRESPONDENCE E-MAIL - 16J14651 - 2/19/2015 (24982923)

Exhibit IMS MMU MISCELLANEOUS document submission

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From: Marilynn O'Mell [mailto:momell@email.schwartzlawfirmpc.com]		Document Date
Sent: Wednesday, February 25, 2015 5:29 PM Fo: Hawkins, Tiffany		3/5/2015
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Legal Assistant to Susan L. Brown		CL Policy Number
Schwartz Law Firm, P.C.		CL Agent Number
37887 W. 12 Mile Road, Suite A Farmington Hills MI 48331		4506
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momell@schwartzlawfirmpc.com		000000000000000000000000000000000000000
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MS Word Document Document Date 3/5/2015 From: Marilynn O'Meil [mailto:momell@email.schwartzlawfirmpc.com] Sent: Wednesday, February 25, 2015 5:29 PM To: Hawkins, Tiffany Subject: 15J24795, Nancy Murray - INVOICE - \$525.00 FACILITATOR FEE Keywords EM Claims Document Type IMS MISCELLANEOUS MMU -Ms. Hawkins. CL Claim Number 15J24795 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. Than CL Policy Symbol you. CL Policy Number 0200T65 Marilynn O'Mell CL Agent Number 4506 Legal Assistant to Susan L. Brown Schwartz Law Firm, P.C. MAIL MessageID 0000000040D82A6157BD0A4482291420A19438 37887 W. 12 Mile Road, Suite A Farmington Hills, MI 48331 248-553-9400/9107 Fax momell@schwartzlawfirmpc.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 X Cancel 👚 Upload above. If the reader of this message is not the intended recipient Skip Apply to all attachments Hawkins, Tiffany No Items

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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.

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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.

vailable Toolbar Buttons	*		Current Toolbar Layout	-	Set Default
Rotate Image 180 degrees			Retrieve Documents		
Run All Cross-References			📇 Open File Cabinets		
Run VB1			Host Session	_	
Run VB2		Add >>	k Import Documents	=	Up
🖇 Run VB3			-SEPARATOR-		
Save Rotation		<< Remove	Print 🔤		Down
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3. Highlight and click Add so it shows up in the right pane.

Available Toolbar Buttons	*		Current Toolbar Layout		Set Defau
😂 Refresh the Current Window			Retrieve Documents		
Rotate Image 180 degrees			💼 Run All Cross-References		
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4. Once added, you click highlight and use the **Up/Down** buttons to move it to the end of the toolbar.

Available Toolbar Buttons	•		Current Toolbar Layout	•	Set Default
Refresh the Current Window			-Zoom Out		
Rotate Image 180 degrees			-SEPARATOR-		
Run VB1			Fit Width		
Run VB2		Add >>	💭 Fit Window		Up
🖗 Run VB3			🖉 Rotate Left		
Save Rotation		<< Remove	Rotate Right		Down
Save to File			Toggle Thumbnails		
💀 Scan/Index			-SEPARATOR-		
Signature Pad			III Tile Vertically		
View Cross-References			Tile Horizontally		Cottingo
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View Document Information	Ξ.		-SEPARATOR-		
View image at original size			Open Custom Queries		
View or Modify Keywords	-		Run All Cross-References	-	

- 5. Click Save when done.
- Now you will notice a new button on your toolbar next to the Open Custom Queries magnifying glass button.
 OnBase Client (OnBase QA) Test System Not For Production Use



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