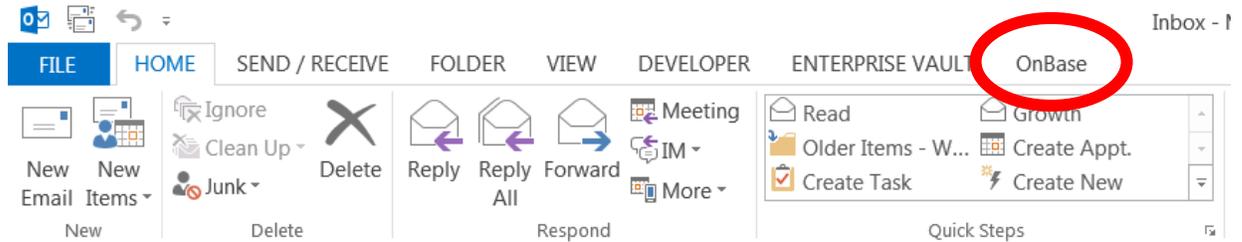


# OnBase/Mobius Outlook Integration

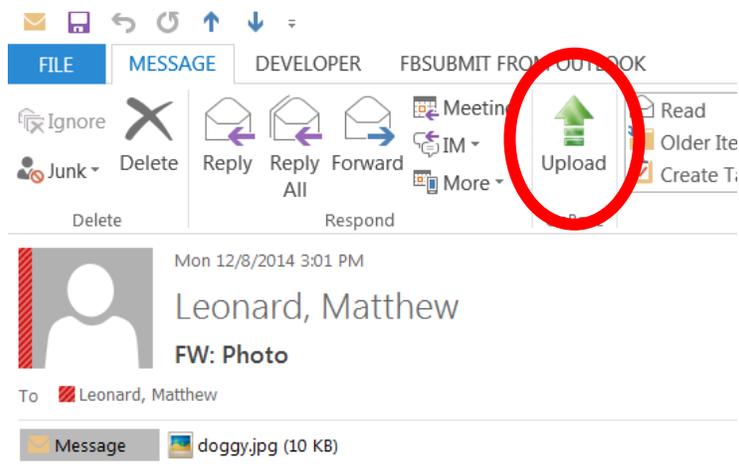
## Life Operations

Below is a step-by-step guide to using the new function to send an email to MOBIUS.

1. The FBSUBMIT Ribbon in Outlook has been replaced with an **OnBase** Ribbon.

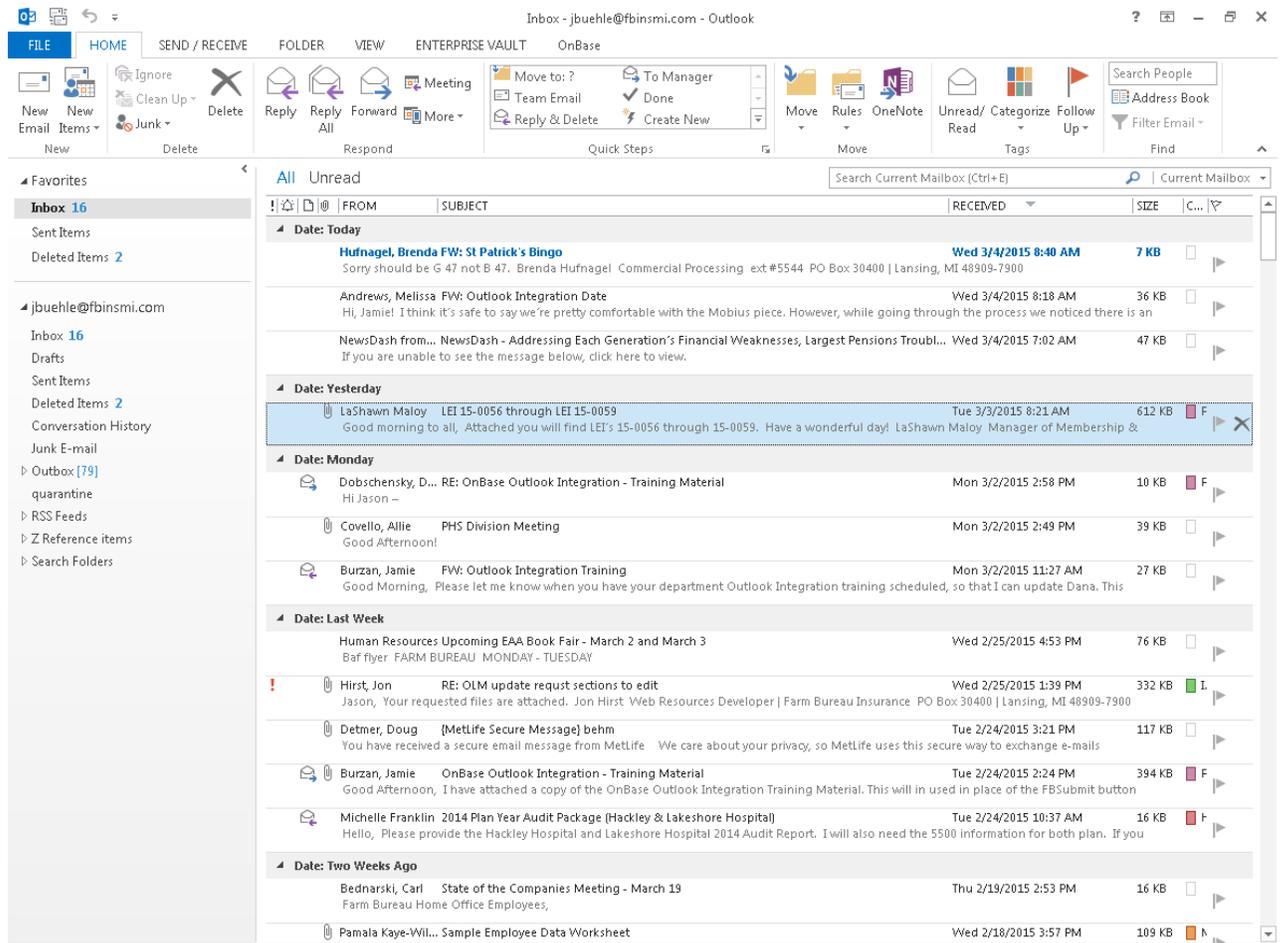


2. The new **Upload** function will replace the FB Submit to MOBIUS button. It works very similarly. FB Submit will no longer work after the Outlook upgrade.



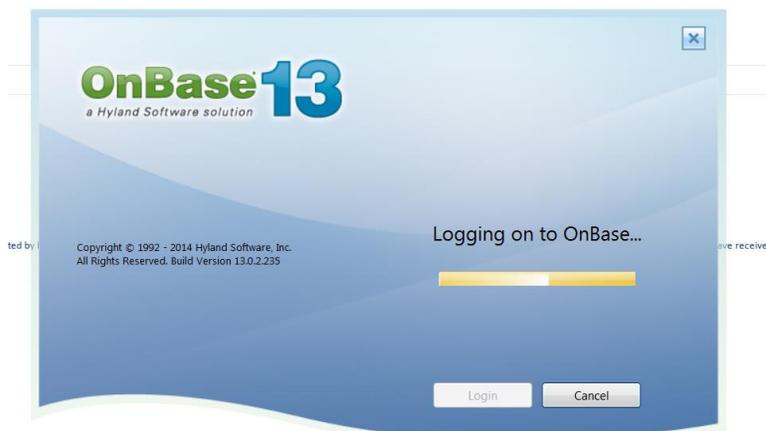
Please see attached photo.

3. In your email panel, double-click the email you want to open.



4. From your open email, click the **Upload** arrow to open the MOBIUS

NOTE: On your first upload of the day, the OnBase splash screen will display for 15 – 30 seconds.



LEI 15-0056 through LEI 15-0059 - Message (HTML)

FILE MESSAGE SUBMIT TO FBUPLOAD

Ignore Delete Reply Reply All Forward OnBase Upload Move to: ? To Manager Team Email Move Mark Unread Categorize Follow Up Translate Zoom

Delete Respond Quick Steps Move Tags Editing Zoom

Tue 3/3/2015 8:21 AM

 LaShawn Maloy <lmaloy@claim.org>  
LEI 15-0056 through LEI 15-0059

To: Chris Murphy  
Cc: LaShawn Maloy

Purple Category

Message  LEI 15-0056.pdf (187 KB)  LEI 15-0057.pdf (118 KB)  LEI 15-0058.pdf (185 KB)  LEI 15-0059.pdf (118 KB)

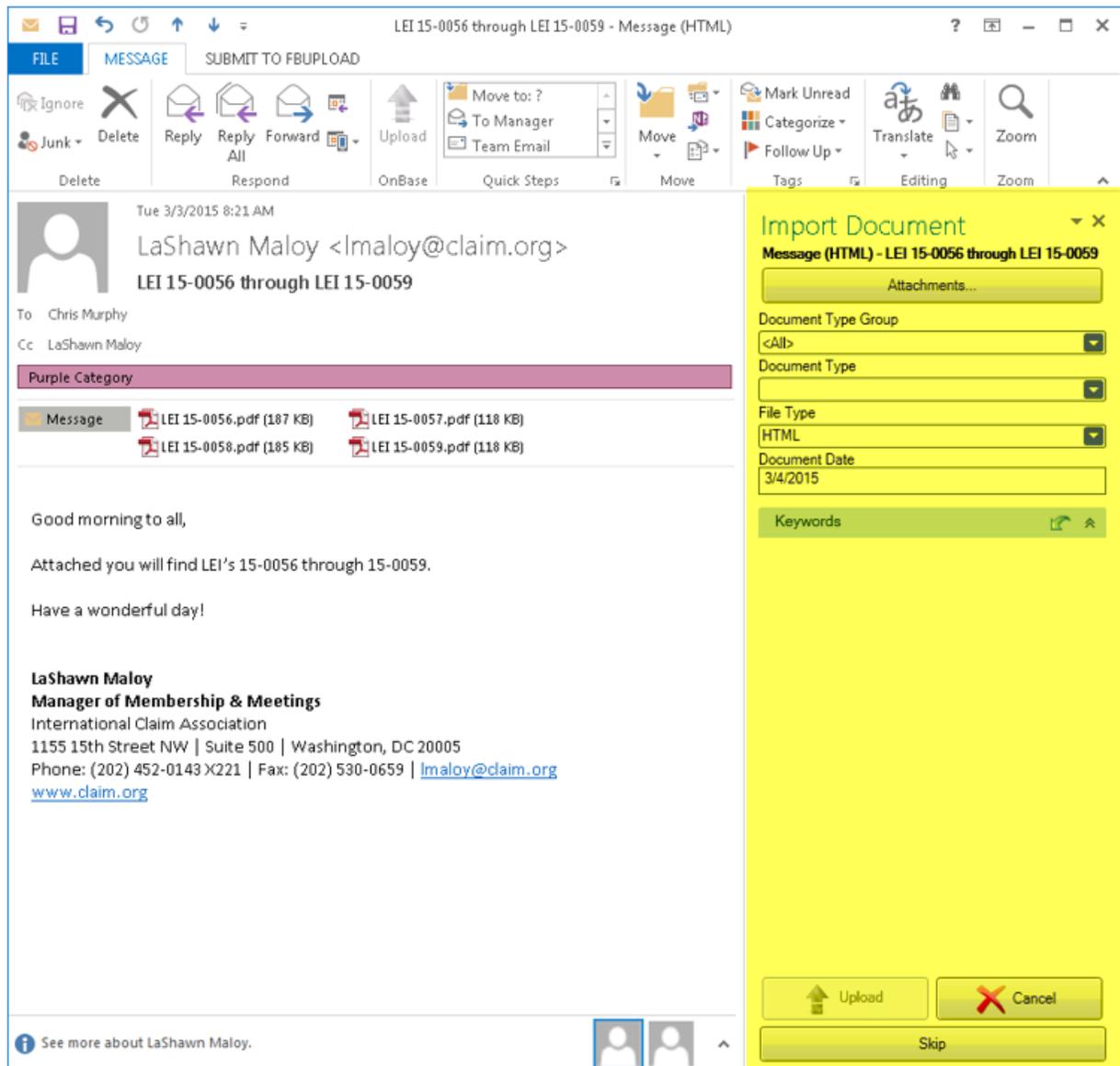
Good morning to all,

Attached you will find LEI's 15-0056 through 15-0059.

Have a wonderful day!

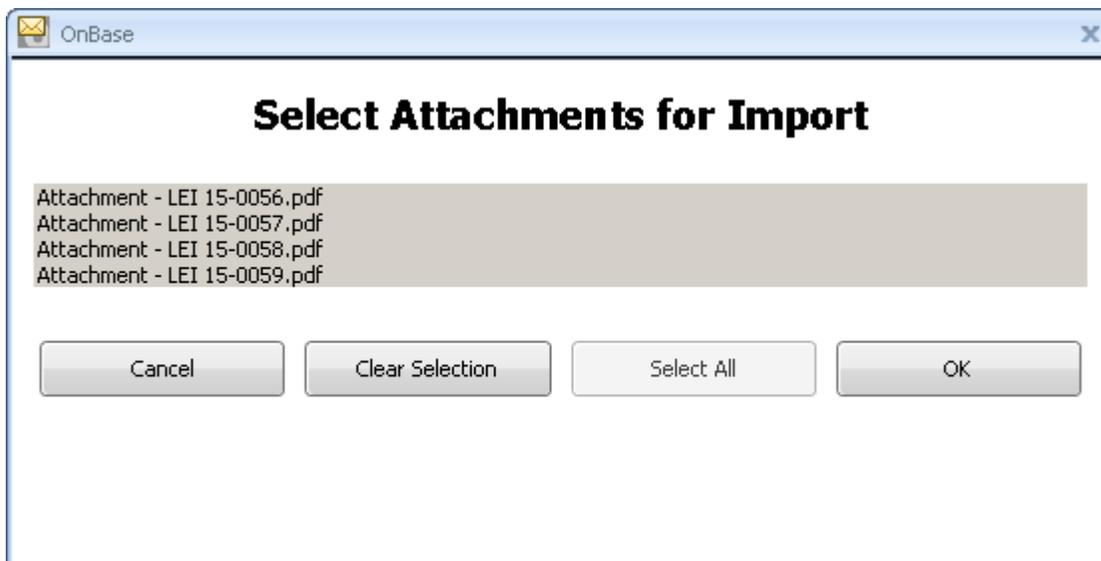
**LaShawn Maloy**  
**Manager of Membership & Meetings**  
International Claim Association  
1155 15th Street NW | Suite 500 | Washington, DC 20005  
Phone: (202) 452-0143 X221 | Fax: (202) 530-0659 | [lmaloy@claim.org](mailto:lmaloy@claim.org)  
[www.claim.org](http://www.claim.org)

5. Next you will see the Import Documents window on the right side of the email.



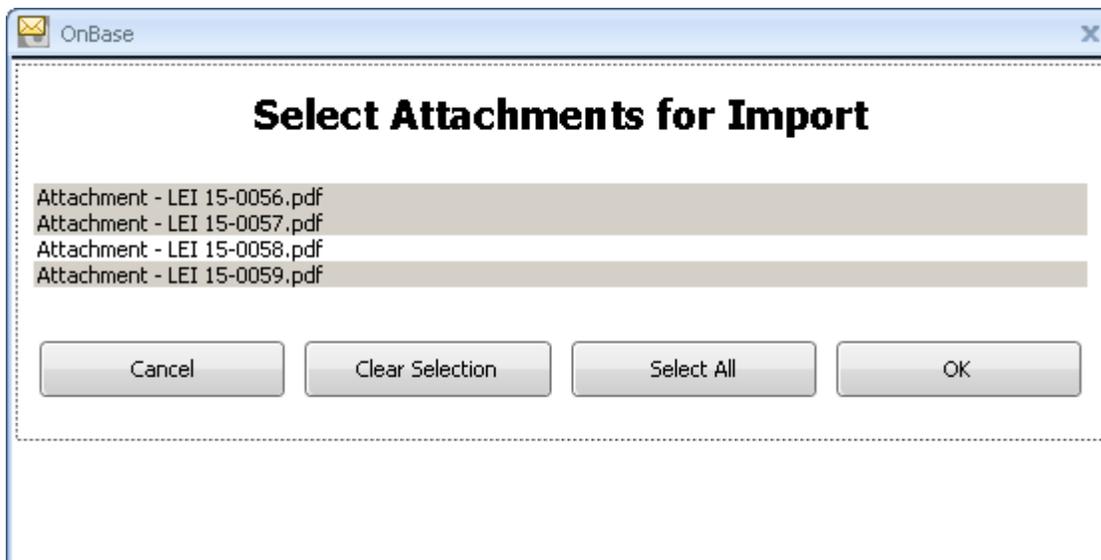
6. Next we'll review how to select attachments that may be with the email.

**Attachments:** At the top of the import document window is an attachments button to click. It will bring up a pop-up that looks like this:



You can see in this example above that the 4 attachments that were attached to the email are in the Attachments box **and they are automatically highlighted for import**.

Let's say we don't want to import the 3<sup>rd</sup> attachment listed. If you click the line it will deselect as shown:



**If you don't want to upload any of the attachments, click Clear Selection** and they will all deselect and become un-highlighted. You can click Select All to select all, or click the attachments individually and they will highlight for upload.

Note: *If the email has pictures in their signature, you might de-select them from the attachment list.*

7. Clicking OK takes us back to the email window. Next, we will look at how to get the email to MOBIUS with the proper indexing information.

MESSAGE SUBMIT TO FBUPLOAD

Delete Reply Reply All Forward Upload Move to: ? To Manager Team Email Move Mark Unread Categorize Follow Up Translate Zoom

Tue 3/3/2015 8:21 AM

LaShawn Maloy <lmaloy@claim.org>  
LEI 15-0056 through LEI 15-0059

Category

LEI 15-0056.pdf (187 KB) LEI 15-0057.pdf (118 KB)  
LEI 15-0058.pdf (185 KB) LEI 15-0059.pdf (118 KB)

Import Document

Message (HTML) - LEI 15-0056 through LEI 15-0059

Attachments...

Document Type Group

<All>

<All>  
LF Life/Annuity Documents  
MOB Email to Mobius Documents

HTML

Document Date

3/4/2015

Keywords

orning to all,

you will find LEI's 15-0056 through 15-0059.

onderful day!

**Maloy**  
r of Membership & Meetings  
onal Claim Association  
1 Street NW | Suite 500 | Washington, DC 20005  
202) 452-0143 X221 | Fax: (202) 530-0659 | [lmaloy@claim.org](mailto:lmaloy@claim.org)  
[im.org](http://im.org)

- Document Type Group:** we will select the "MOB Email to Mobius Documents" from the dropdown.
- Document Type:** now we select "MOB EMAIL POLICY DOCUMENT". Life does not have account level documents.

Tue 3/3/2015 8:21 AM  
 LaShawn Maloy <lmaloy@claim.org>  
 LEI 15-0056 through LEI 15-0059

Category

LEI 15-0056.pdf (187 KB)    LEI 15-0057.pdf (118 KB)  
 LEI 15-0058.pdf (185 KB)    LEI 15-0059.pdf (118 KB)

Importing to all,  
 you will find LEI's 15-0056 through 15-0059.  
 wonderful day!

**LaShawn Maloy**  
**Director of Membership & Meetings**  
 National Claim Association  
 1400 K Street NW | Suite 500 | Washington, DC 20005  
 (202) 452-0143 X221 | Fax: (202) 530-0659 | [lmaloy@claim.org](mailto:lmaloy@claim.org)  
[claim.org](http://claim.org)

**Import Document**  
 Message (HTML) - LEI 15-0056 through LEI 15-0059  
 Attachments...  
 Document Type Group: MOB Email to Mobius Documents  
 Document Type: **MOB EMAIL POLICY DOCUMENT**  
 Document Date: 3/4/2015  
 Keywords

**NOTE: Don't change from "HTML" and you probably don't need to change the Document Date (that defaults to current date).**

**Import Document**  
 Message (HTML) - LEI 15-0056 through LEI 15-0059  
 Attachments...  
 Document Type Group: MOB Email to Mobius Documents  
 Document Type: MOB EMAIL POLICY DOCUMENT  
**File Type: HTML**  
 Document Date: 3/4/2015

- c. Select the **MOB Policy Documents Type** from the dropdown (for example: CRFA= Correspondence From Agent)

The screenshot shows an email client window titled "LEI 15-0056 through LEI 15-0059 - Message (HTML)". The email is from LaShawn Maloy <lmaloy@claim.org> with the subject "LEI 15-0056 through LEI 15-0059". The email body contains a greeting, a message about attached LEI documents (15-0056 through 15-0059), and contact information for LaShawn Maloy, Manager of Membership & Meetings at the International Claim Association. On the right side, there is an "Import Document" sidebar. The sidebar shows the document type group as "MOB Email to Mobius Documents" and the document type as "MOB EMAIL POLICY DOCUMENT". A dropdown menu is open, showing a list of document types: PIC, CRFO, CRTO, CRTI, CRFI, CRFA, CRTA, UNDD, DEAT, GUID, TMRA, PCHG, CFHO, and CHGR. The "MOB Policy Document Type" is highlighted in red in the dropdown list. Below the dropdown, there are fields for "PC Skipped Account #", "Effective Date", and buttons for "Upload", "Cancel", and "Skip".

- d. Enter the 7-digit **Policy Number** (like MOBIUS) then **Policy Symbol** will autofill when indexed. If not, choose from the drop down (000 or 090). The policy number will trigger a lookup into the Smart Index to pull back information to index the document.

Delete
Reply
Reply All
Forward
Upload
Move to: ?
To Manager
Team Email
Move
Mark Unread
Categorize
Follow Up
Translate
Zoom

Tue 3/3/2015 8:21 AM

LaShawn Maloy <lmaloy@claim.org>

LEI 15-0056 through LEI 15-0059

Category

LEI 15-0056.pdf (187 KB)
 LEI 15-0057.pdf (118 KB)

LEI 15-0058.pdf (185 KB)
 LEI 15-0059.pdf (118 KB)

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[www.claim.org](http://www.claim.org)

Learn more about LaShawn Maloy.

### Import Document

Message (HTML) - LEI 15-0056 through LEI 15-0059

Attachments...

Document Type Group: MOB Email to Mobius Documents

Document Type: MOB EMAIL POLICY DOCUMENT

File Type: HTML

Document Date: 3/4/2015

Keywords

MOB Policy Document Type

Policy #

Policy Symbol

1  
 A  
 BAP  
 CF  
 CIM  
 CPP  
 DP  
 FO  
 GL  
 HO  
 LE  
 MHO  
 POL  
 S

e. Enter the Effective Date and Process Date as needed

The screenshot shows an email client window titled "LEI 15-0056 through LEI 15-0059 - Message (HTML)". The email is from LaShawn Maloy (lmaloy@claim.org) to Chris Murphy. The subject is "LEI 15-0056 through LEI 15-0059". The email body contains the following text:

Good morning to all,  
Attached you will find LEI's 15-0056 through 15-0059.  
Have a wonderful day!

**LaShawn Maloy**  
Manager of Membership & Meetings  
International Claim Association  
1155 15th Street NW | Suite 500 | Washington, DC 20005  
Phone: (202) 452-0143 X221 | Fax: (202) 530-0659 | [lmaloy@claim.org](mailto:lmaloy@claim.org)  
[www.claim.org](http://www.claim.org)

The email has four attachments: LEI 15-0056.pdf (187 KB), LEI 15-0057.pdf (118 KB), LEI 15-0058.pdf (185 KB), and LEI 15-0059.pdf (118 KB). On the right side, there is an "Import Document" sidebar with the following fields:

- Document Type Group: MOB Email to Mobius Documents
- Document Type: MOB EMAIL POLICY DOCUMENT
- File Type: HTML
- Document Date: 3/4/2015
- Keywords: CRFA
- Policy #: 123460
- Policy Symbol: 1
- Insured Name: (empty)
- Agent #: (empty)
- PC - Company #: (empty)
- PC - Cloaked Account #: (empty)
- Effective Date: (empty)
- Process Date: (empty)

Buttons at the bottom of the sidebar include "Upload", "Cancel", and "Skip".

For indexing purposes, please ignore the keywords: *Sent To Mobius, User Name of Indexer, and Document Handle*

Sent To Mobius

User Name of Indexer

Document Handle

8. The email can now be uploaded:
  - a. Click the Upload button to send to MOBIUS.
  - b. Click Cancel to cancel the upload
  - c. Clicking Skip, skips indexing the message and uploads only the attachments (if any)

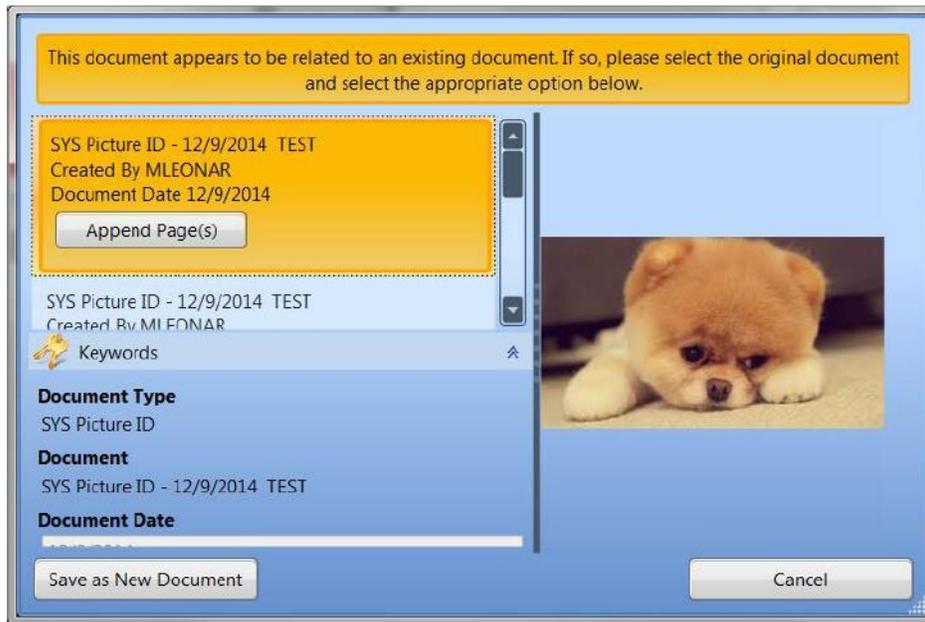
The screenshot shows an email client interface. At the top, there is a ribbon with various action buttons like Delete, Reply, Forward, Upload, Move, etc. The main email content is from LaShawn Maloy, dated Tue 3/3/2015 8:21 AM. The subject is "LEI 15-0056 through LEI 15-0059". There are four PDF attachments listed: LEI 15-0056.pdf (187 KB), LEI 15-0057.pdf (118 KB), LEI 15-0058.pdf (185 KB), and LEI 15-0059.pdf (118 KB). The email body contains a greeting and a link to find LEI's. On the right side, an "Import Document" dialog box is open, showing fields for Document Type Group (MOB Email to Mobius Documents), Document Type (MOB EMAIL POLICY DOCUMENT), File Type (HTML), and Document Date (3/4/2015). At the bottom of the dialog, three buttons are highlighted in yellow: "Upload", "Cancel", and "Skip".

9. If attachments were selected, you will be presented to index the attachments(s). Use the same processes to index.

When indexing the first attachment, you will be presented with a checkbox at the bottom of the pane called Apply to all attachments.

Apply to all attachments

This allows you to index the remaining attachments with the same information. During this process, you will be presented with a windows to confirm whether to create a new document, or append as a page to an existing.



To append, click on the document in the list, then click the Append Page(s) button.  
To create a new document, just click the Save as New Document button.

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