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.

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Please see attached photo.

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

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≠ jbuehle@fbinsmi.com	Andrews, Melissa FW: Outlook Integration Date Hi, Jamiel I think it's safe to say we're pretty comfortable with the Mobius piece. However, while going throu	Wed 3/4/2015 8:18 AM ugh the process we noticed ther	36 KB eisan	►	
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Conversation History	◎ LaShawn Maloy LEI 15-0056 through LEI 15-0059 Good morning to all, Attached you will find LEI's 15-0056 through 15-0059. Have a wonderful day! LaShawr	Tue 3/3/2015 8:21 AM n Maloy Manager of Membershi	612 КВ [р&	^F ► ×	
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quarantine	Dobschensky, D RE: OnBase Outlook Integration - Training Material Hi Jason –	Mon 3/2/2015 2:58 PM	10 KB	F	
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	Human Resources Upcoming EAA Book Fair - March 2 and March 3 Baf flyer FARM BUREAU MONDAY - TUESDAY	Wed 2/25/2015 4:53 PM	76 KB	•	
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	Burzan, Jamie OnBase Outlook Integration - Training Material Good Afternoon, I have attached a copy of the OnBase Outlook Integration Training Material. This will in us	Tue 2/24/2015 2:24 PM red in place of the FBSubmit but	394 KB	F	
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	🕖 Pamala Kaye-Wil Sample Employee Data Worksheet	Wed 2/18/2015 3:57 PM	109 KB	N III	-

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.

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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:

OnBase	x
Select Attachments for Import	
Attachment - LEI 15-0056.pdf Attachment - LEI 15-0057.pdf Attachment - LEI 15-0058.pdf Attachment - LEI 15-0059.pdf	
Cancel Clear Selection Select All OK	

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*.

OnBase X
Select Attachments for Import
Attachment - LEI 15-0056.pdf Attachment - LEI 15-0057.pdf Attachment - LEI 15-0058.pdf Attachment - LEI 15-0059.pdf
Cancel Clear Selection Select All OK

Let's say we don't want to import the 3rd 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 tem 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.



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



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)



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.



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International Claim Association 1155 15th Street NW Suite 500 Washington, DC 20005	Agent #
Phone: (202) 452-0143 X221 Fax: (202) 530-0659 <u>Imaloy@claim.org</u> www.claim.org	PC - Company #
	PC - Cloaked Account #
	Effective Date
	Process Date
	Upload Cancel
See more about LaShawn Maloy.	Skip

e. Enter the Effective Date and Process Date as needed

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)



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.