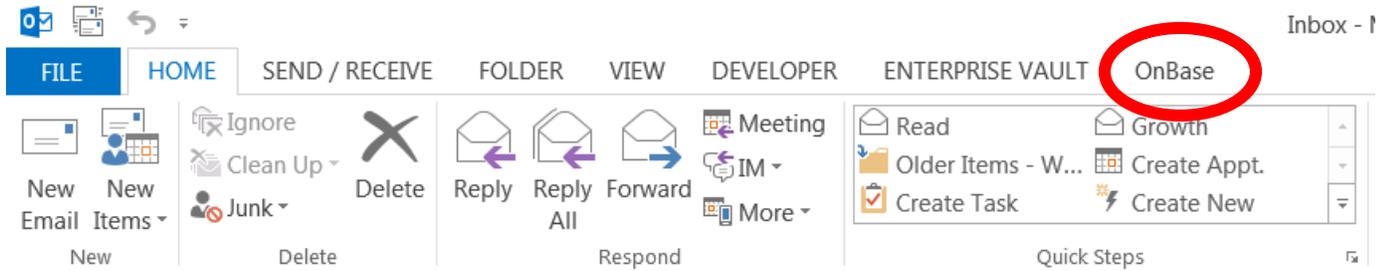


OnBase Outlook Integration

Underwriting | PHS | Marketing

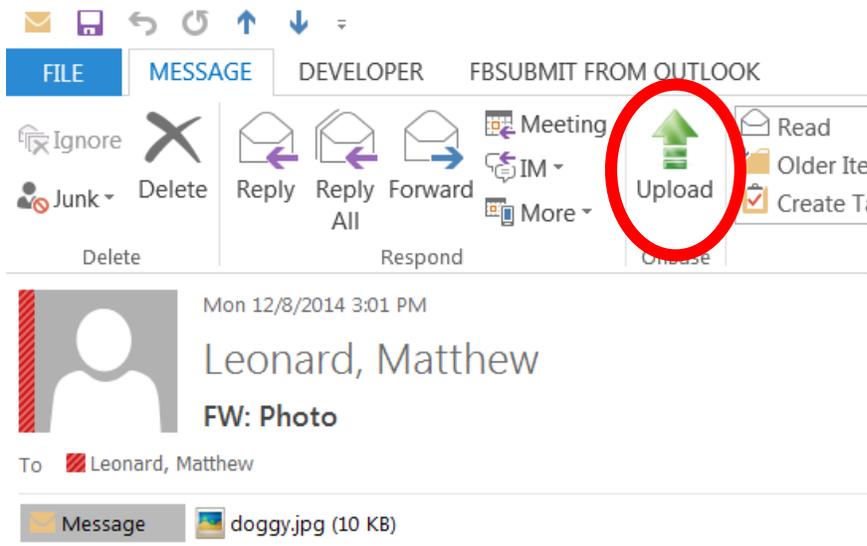
Installation:

1. Once installed, you should see the OnBase tab at the top of your Outlook ribbon.



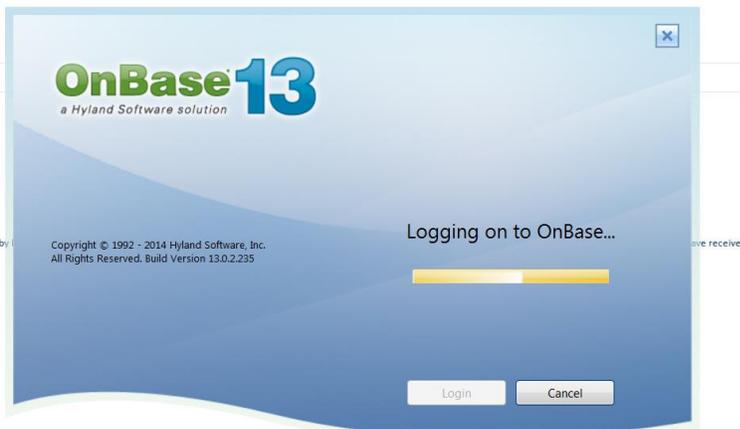
Usage:

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

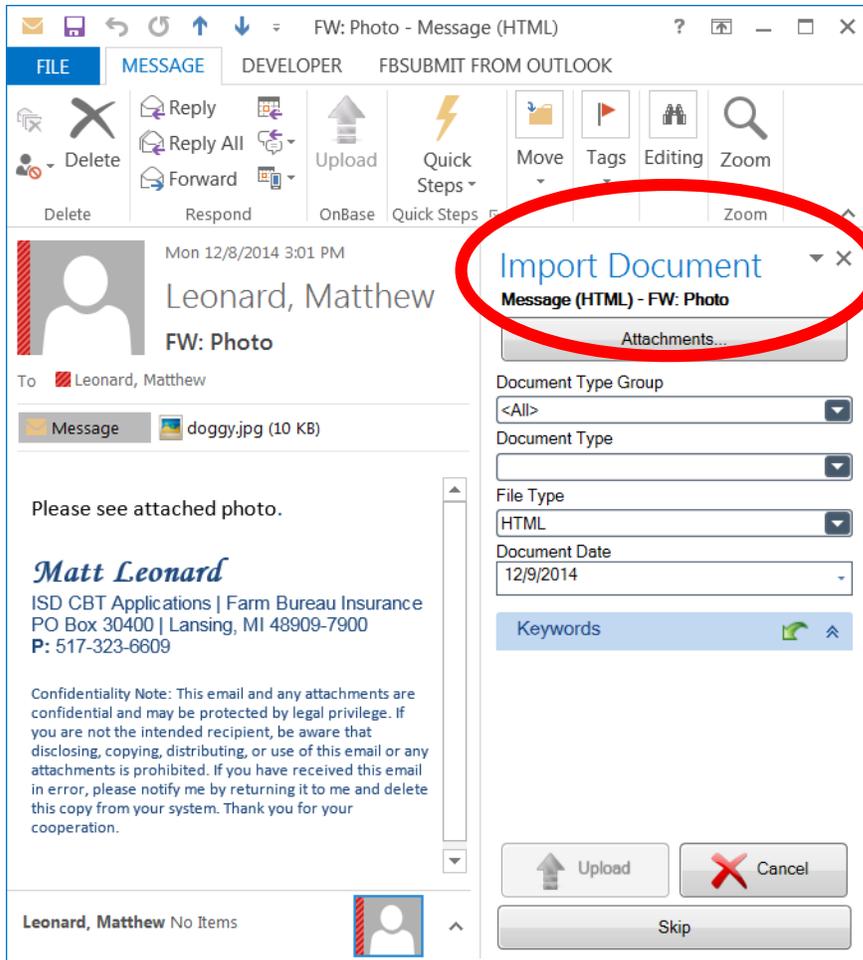


Please see attached photo.

2. An OnBase splash screen will display.



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. The first item to index is the message, then attachments. You can see you are currently on the message represented by the text above the Attachments... button, "Message (HTML)"

Import Document

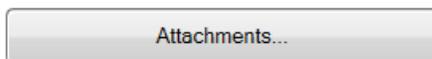
Message (HTML) - FW: Photo

Import Document

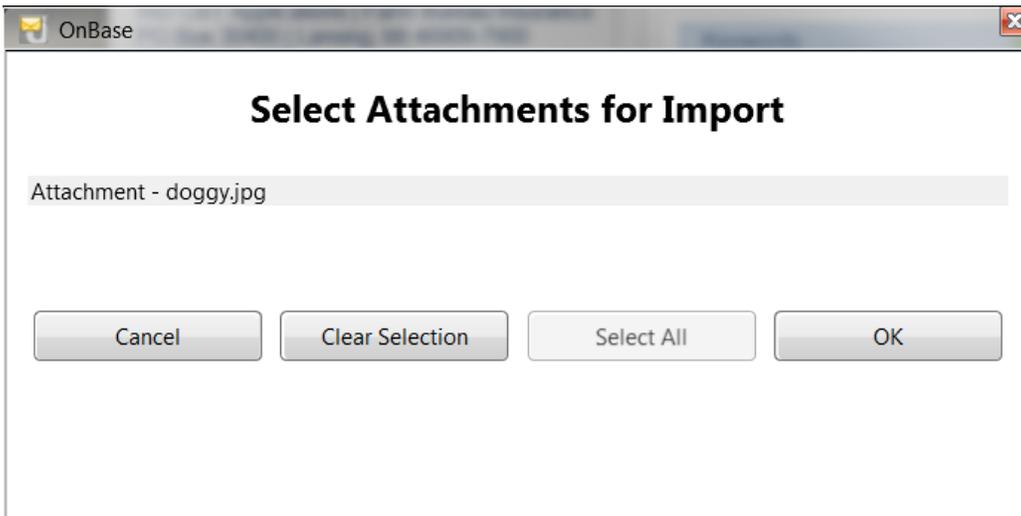
Attachment - doggy.jpg

- b. The attachments are automatically selected to index. If you need to change your attachment selections, you can click on the Attachments button to de-select or select which attachments you would like to index to import.

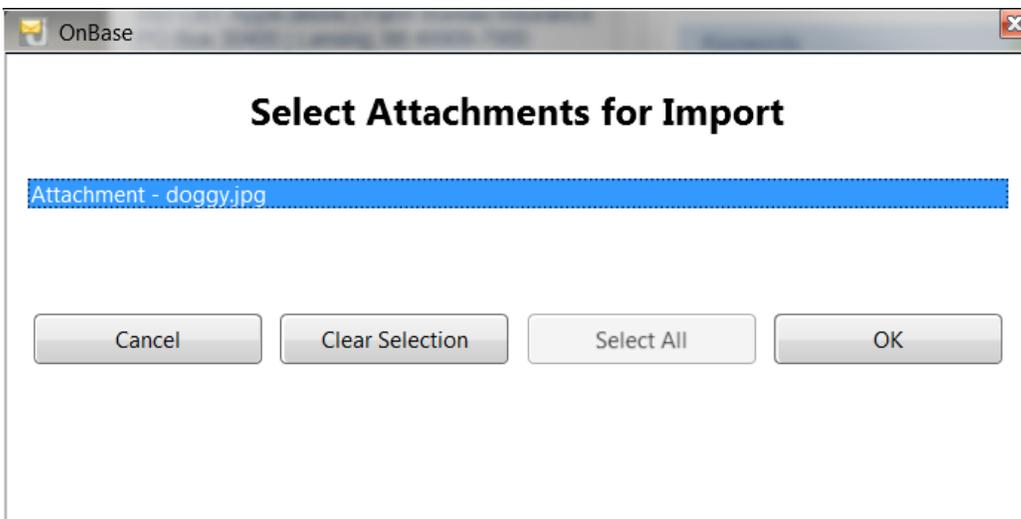
Message (HTML) - FW: Photo



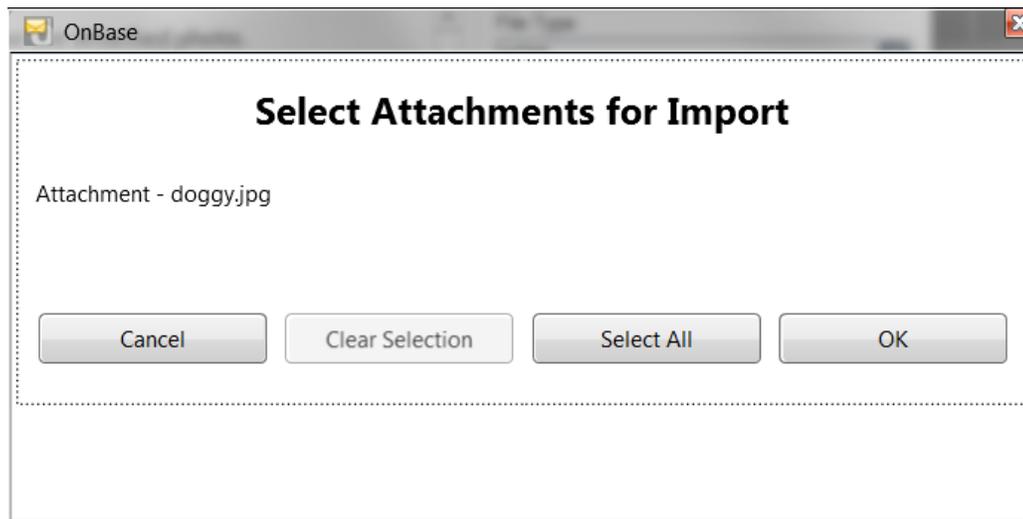
Selected attachment:



OR:



De-selected attachment:



- c. The Document Type Group and Document Type lists are exactly the same lists as seen in any other OnBase module, like the OnBase Client. Select the *MOB Email to Mobius Documents* Document Type Group, then select the appropriate Document Type.

Document Type Group
MOB Email to Mobius Documents

Document Type
MOB Email Account Documents

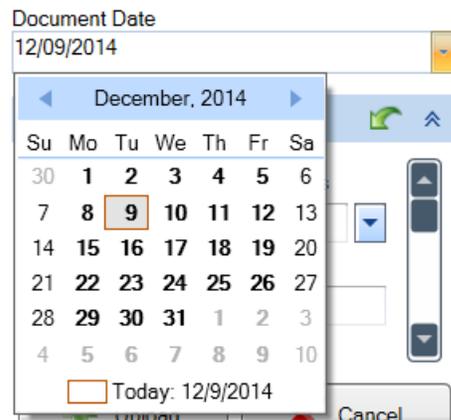
- d. **File Type will automatically fill.** The email will default to HTML, and attachments will default to the format in which they were received. **Be careful not to change this unless you are sure of what you are changing.**

File Type
HTML

- e. The Document Date defaults to Today

Document Date
12/09/2014

Clicking on the down arrow gives you a calendar



- f. The Keyword panel is where you index the document. You must select a Mobius document type here where you would expect it to view within Mobius. The Policy # will trigger a lookup into the Smart Index to pull back more information to help index the document

Keywords

MOB Policy Document Types

Policy #

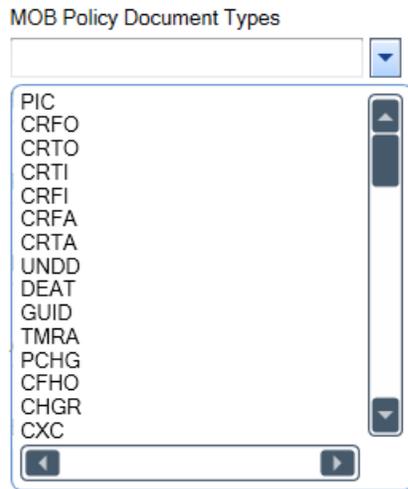
Policy Symbol

Insured Name

Agent #

Effective Date

Process Date



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

- g. The buttons at the bottom include:
- Upload:** When you have completed indexing each item, Message and Attachment(s), click the Upload button to commit your changes to OnBase. This will move to the next item automatically, if you have anymore.
 - Cancel:** Click this button to cancel the upload process.
 - Skip:** This skips indexing the message, and only upload the attachments, if you chose to upload attachments.

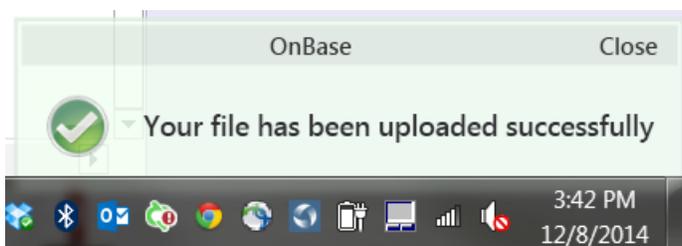
5. If applicable, click the Attachments button to change your attachment selection.

NOTE: *If someone sends you an email with pictures in their signature, you might have to de-select them from the attachment list.*

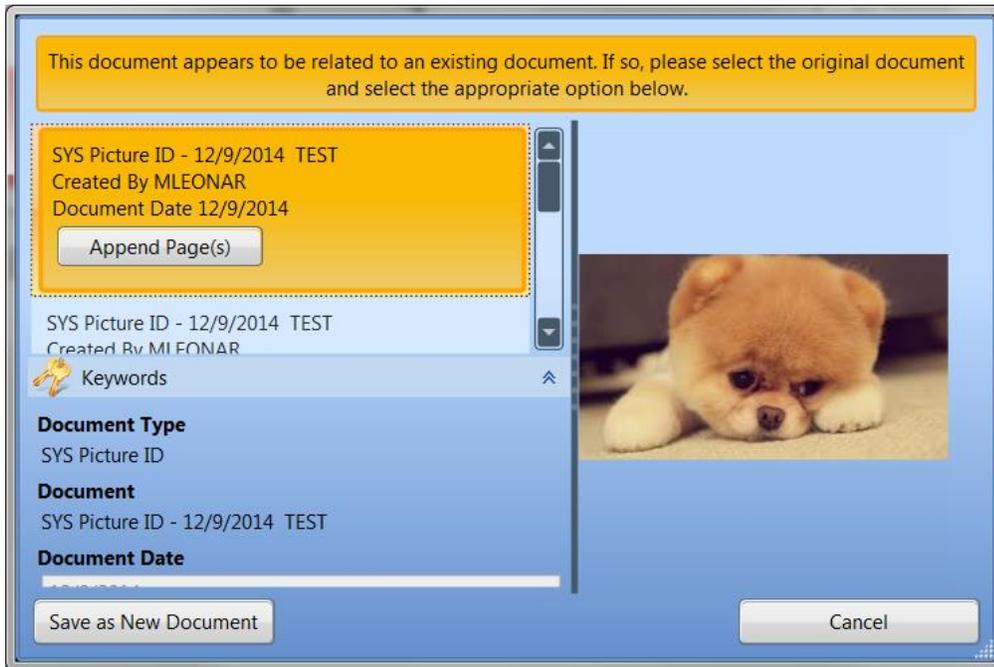
6. For the Message, choose to either Skip, or index the document. If you choose to index, select the Document Type Group, Document Type, and then key in the data respectively.

7. Once completed keying, click Upload.

8. You will see a notification on each successful upload



9. If an email includes more than one Image File as the attachment, you will be presented with a window to index the photo as a new document, or append to the existing document type.



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.