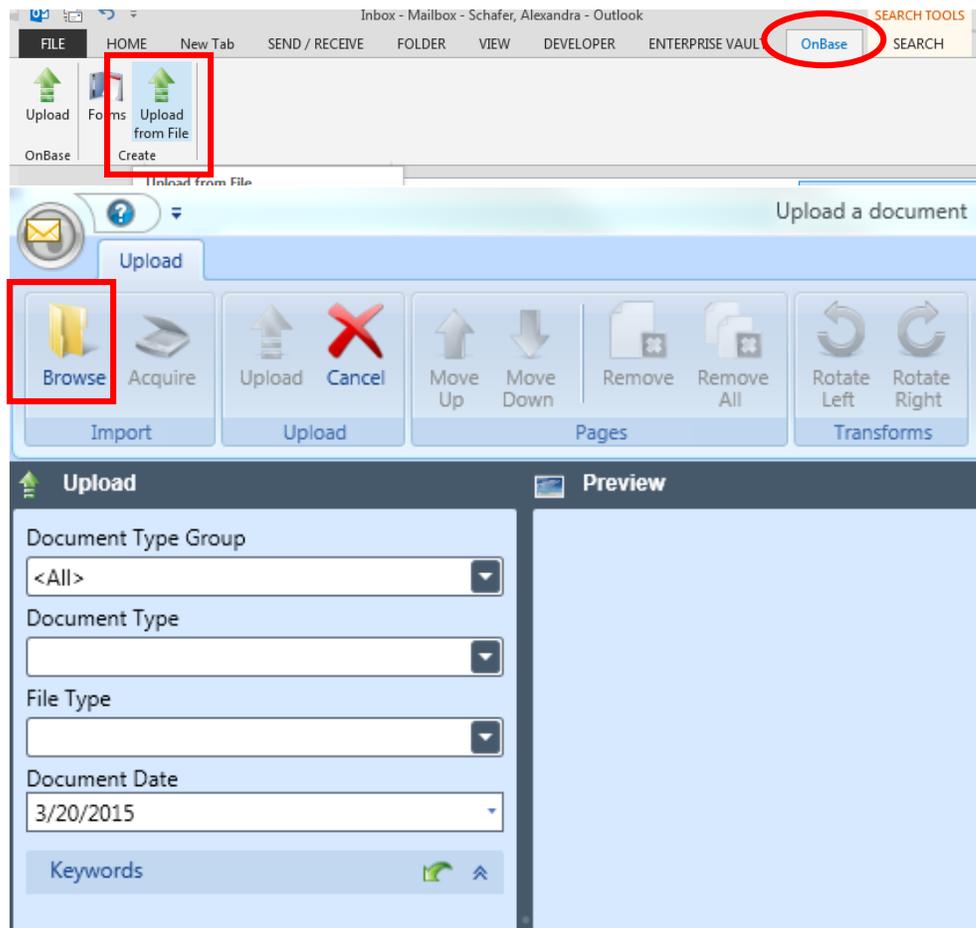


# OnBase/Mobius Outlook Integration

## *Tips and Tricks*

As you continue to familiarize yourself with the FB Submit replacement, Outlook Integration, keep the following tips in mind:

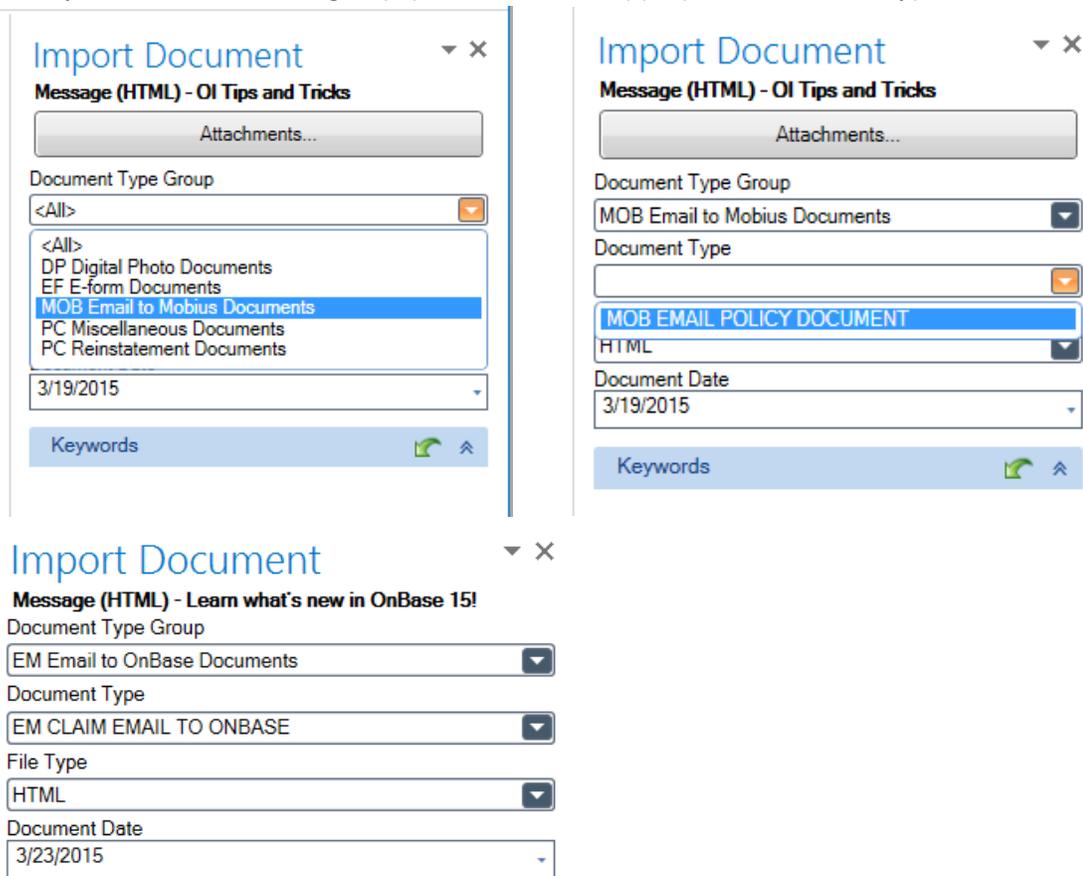
1. Outlook Integration is **not supported through Cisco VPN** connection. This is not to be confused with View. View is the preferred solution for users working offsite accessing the Outlook Integration.
2. **Outlook Integration does not replace FB Upload.** FB Upload should continue to be used to submit large amounts of pictures rather than using the Outlook Integration feature. Outlook Integration can still be used for uploading photos that already exist on emails.
3. Utilize the **'Upload from File'** in Outlook if you need to send documents to OnBase or Mobius that are not in your inbox. The OnBase tab in Outlook allows users to browse and upload files by clicking 'Upload from File.' From there, users can index the documents as they normally would an email.



- When policy numbers are similar, sometimes Outlook Integration will prompt another screen to pop-up. When this happens, select the policy in which you are indexing.



- For sending documents directly to Mobius, always select **"MOB Email to Mobius Documents"**. For sending claim documents to OnBase, always select **"EM Email to OnBase Documents"**. Once you have selected the group, please select the appropriate Document Type.



After this selection is made it will automatically bring up the Smart indexing field.

The 'Keywords' form contains the following fields:

- MOB Policy Document Type (dropdown menu)
- Policy # (text input)
- Policy Symbol (text input)
- Insured Name (text input)
- Agent # (text input)
- PC - Company # (text input)
- PC - Cloaked Account # (text input)
- Effective Date (text input)
- Process Date (text input)

Buttons at the bottom: Upload (with green arrow icon), Cancel (with red X icon), and Skip.

## 6. Uploading Attachments:

- i. The attachments being uploaded will correlate to the name (in the top right corner of upload) of the attachment/subject of email. This informs the user of what is being indexed/uploaded, and from there, may be uploaded or skipped.

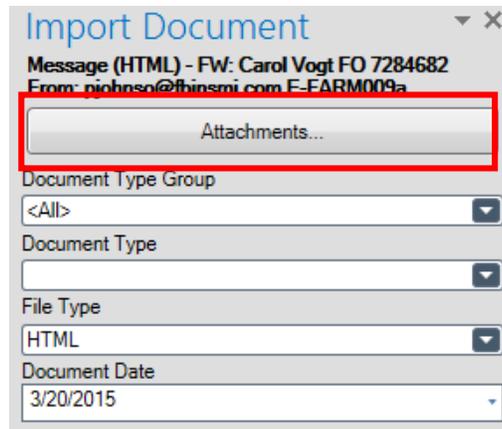


- ii. The email itself (including the body with or without text) is by default the first item to be indexed.

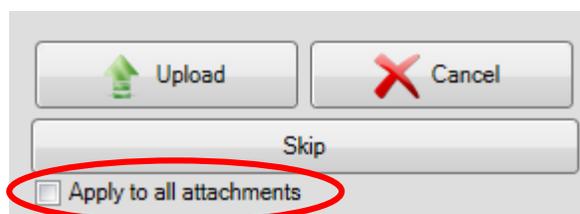


- iii. All attachments in the email will have to be uploaded one at a time.
  - a. Example: If an email contains no text but three pictures, the 'Upload' button will be clicked four times. To avoid uploading a blank email, you may click 'Skip' to move on to the next attachment and upload.
  - b. Each individual attachment in the email must be uploaded separately (photos, PDF's, photos in the body of an email). With the old FB submit, all attachments were saved within the one document (email was saved with photo/PDF). Now we have the capability of separating them by what they are (Example: Email=CRFA, Photos=PIC, PDF=INSP, etc.).

- iv. The attachments button at the top of the screen is for deselecting purposes, only. You may view the selected attachments in the email by using this button. Also, attachments that you do not want to upload can be deselected here. REMEMBER: **this is not a button that uploads all the attachments**. It simply gives you the option to deselect unwanted ones. All attachments are automatically attached by default.



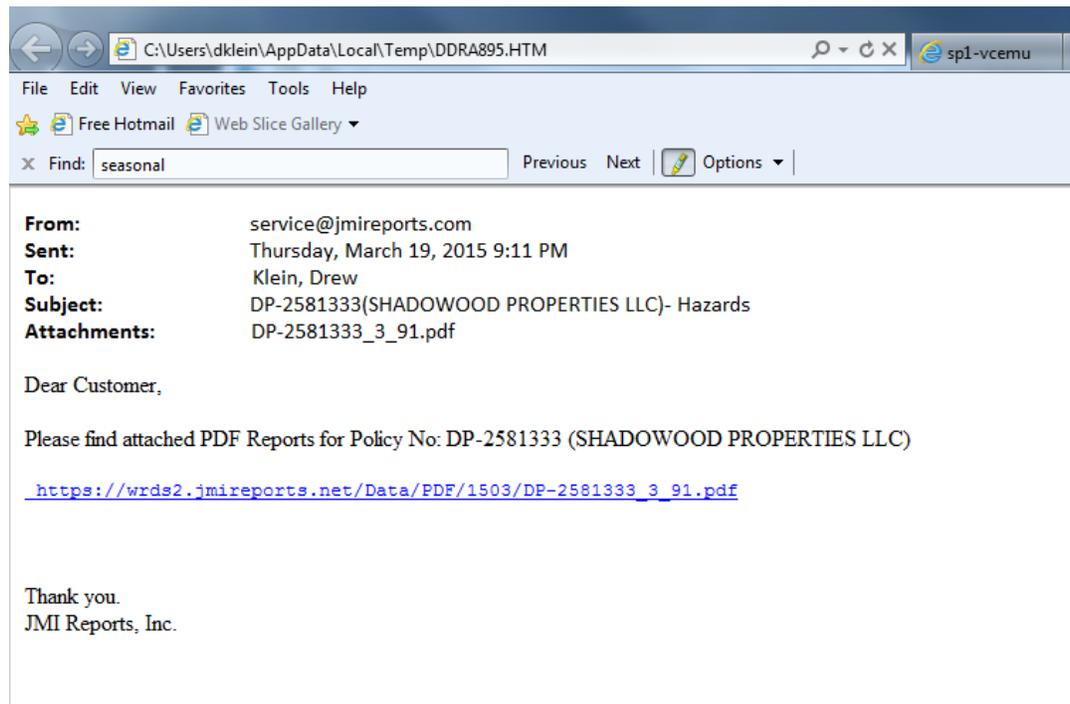
- v. Images in the body of an email will be uploaded as attachments and will appear in the "See Attachments for Import" dialogue box in the order they appear in the email. These images will not appear in the email itself after uploading.
- vi. When indexing, be sure to **enter the full** Account, Policy or Claim number.
- vii. The '**Apply to All Attachments**' box uploads everything including unnecessary items like Facebook Icons, Logos, etc. It is **not recommended** this is used unless the user knows what attachments are included in the email.



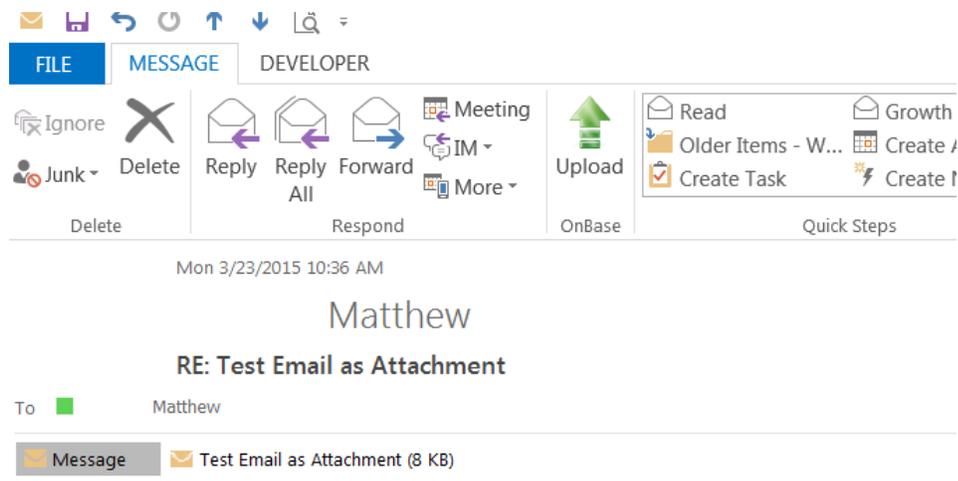
- viii. When multiple attachments are uploaded they will be viewable in Mobius by using 'Page Down.' Previously, multiple attachments were viewable by scrolling.



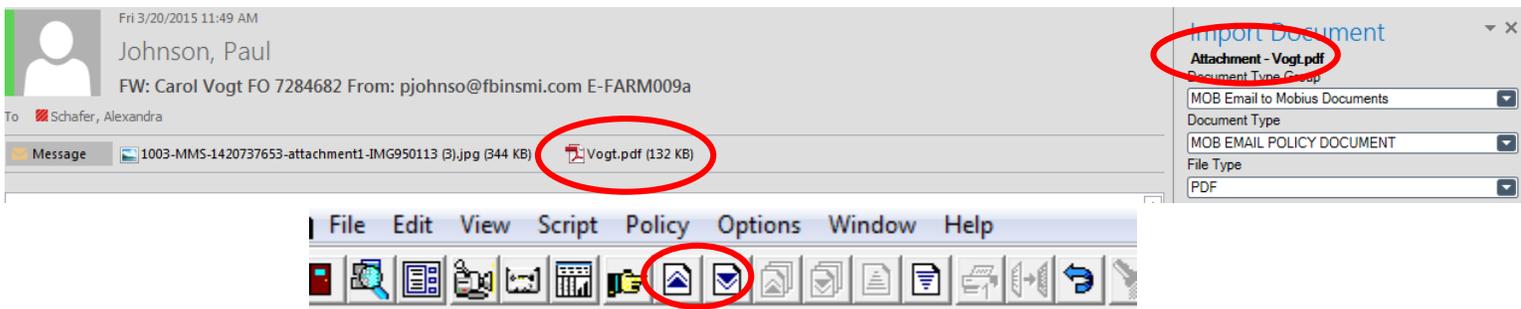
At first the system will bring up a window either on your main screen or through your browser normally displaying the first page of the email. Once this pops up, return to the arrows in the Mobius bar, and push the Down arrow, and it will take you to your Photo's/PDF.



- ix. **.msg is not a supported format** and will fail to be sent to Mobius. This is usually when someone attaches a different email.



- x. .pdf documents that are uploaded through Outlook Integration will be uploaded the same way as any other attachment. When viewing in Mobius, the email will appear first and the .pdf can be found by using "Page Down".



- 7. When all attachments of an emails are uploaded or skipped, the pane will close.** Once everything (email/attachments) have been indexed and uploaded, the pane for the upload will close. Whereas FBSUBMIT would give you a prompt telling you it has been submitted. The new OnBase Outlook Integration will display a confirmation when each message and attachment are uploaded in the bottom right of your screen.

