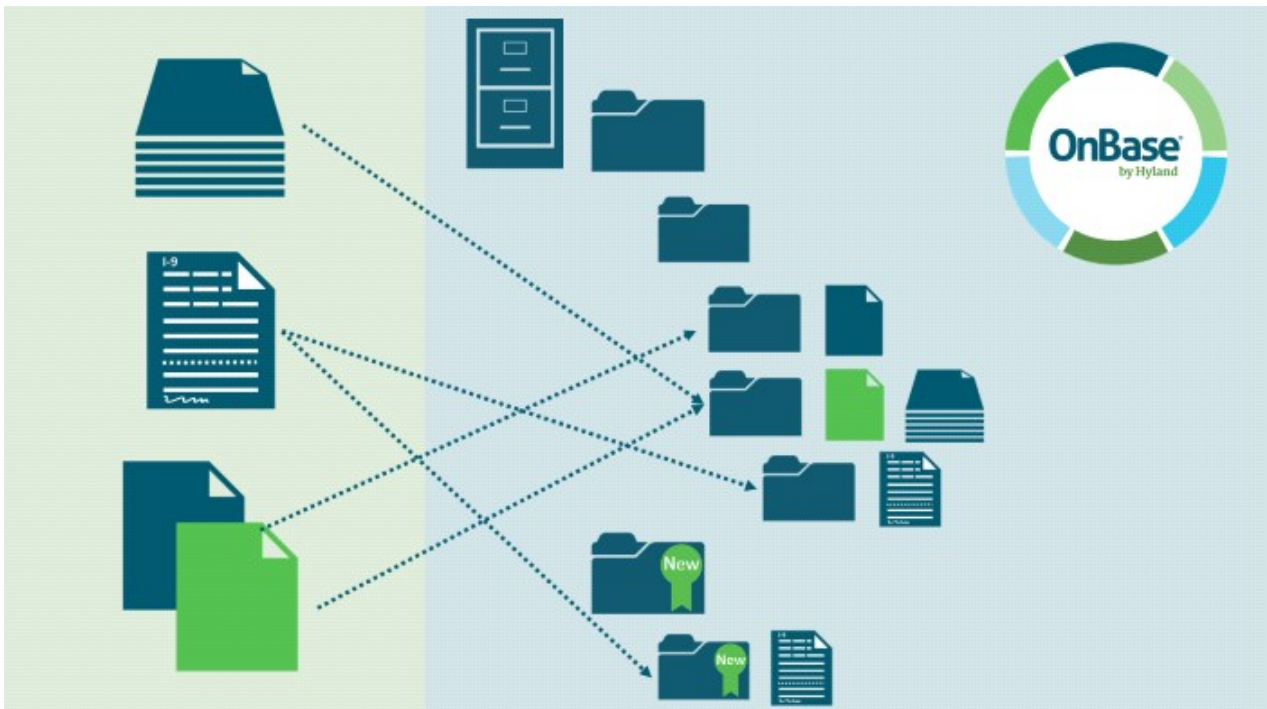# ONBASE

FOLDERS AND FILE CABINETS

SUMMARY

Folders and File Cabinets allow users to view and organize documents electronically, just as they would with a folder of paper documents, but with the added benefits and security offered by OnBase. Users are able to access related documents in a way that is familiar, intuitive and easy to use. Folder structures can be automatically created and populated without user interaction, based on business needs and categories.

BENEFITS

- **Contextually organize and display** content based on business process and user needs
- **Maximize productivity** through an intuitive interface that mimics familiar physical paper folder structures
- **Increase accuracy** by automating folder creation, document filing and identification of missing documents
- **Improve efficiency** by providing users with the ability to quickly locate related documents
- **Maintain authorized access** providing security at a folder, document and/or keyword level
- **Reduce costs** associated with disorganization and inaccuracies of manual filing systems
- **Further leverage current investment** by increasing user acceptance

DESIGN

OnBase Folders can be automatically created as documents are imported. These documents (or documents that already exist in the system) are automatically placed into the appropriate folder for retrieval. OnBase provides the ability for users to store a document once, and retrieve it from a familiar folder interface that can be configured to department or user need. Because there is only one actual document, even if many folders contain pointers to the document; when the document is revised, the changes are reflected in all locations.

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APPLICATIONS

- **Manage Correspondence:** In the **insurance** industry, there is a great deal of correspondence surrounding a claim. To organize it in a meaningful way, a correspondence folder can be created; sub folders further categorize by type, while associating it with the appropriate claim.
- **Identify Record Completeness:** In the **financial services** industry, a mortgage broker can immediately identify missing documents to complete a loan application. A virtual version of the typical file checklist can be created through the use of a folder template.

KEY FEATURES

- **Auto-Foldering** automatically creates a folder hierarchy upon "trigger" document import
- **Dynamic Folders** automatically displays documents in folder(s) based on keyword values
- **Tabbed Interface** provides colored tabs that mimic those used within physical folders and binders
- **Auto-Index** documents imported via drag/drop to a folder will inherit like keywords
- **Folder Templates** filter the view of folder contents and provide a visual indicator of missing documents
- **Folder Filters** allow users to enter filter criteria via an HTML form and results in a sortable column display
- **Folder Notes** allow users to add notes to folders with bookmarks to a specific document page
- **FolderPop** extends folder interface and viewers via a URL-based rapid development tool

INTERFACE
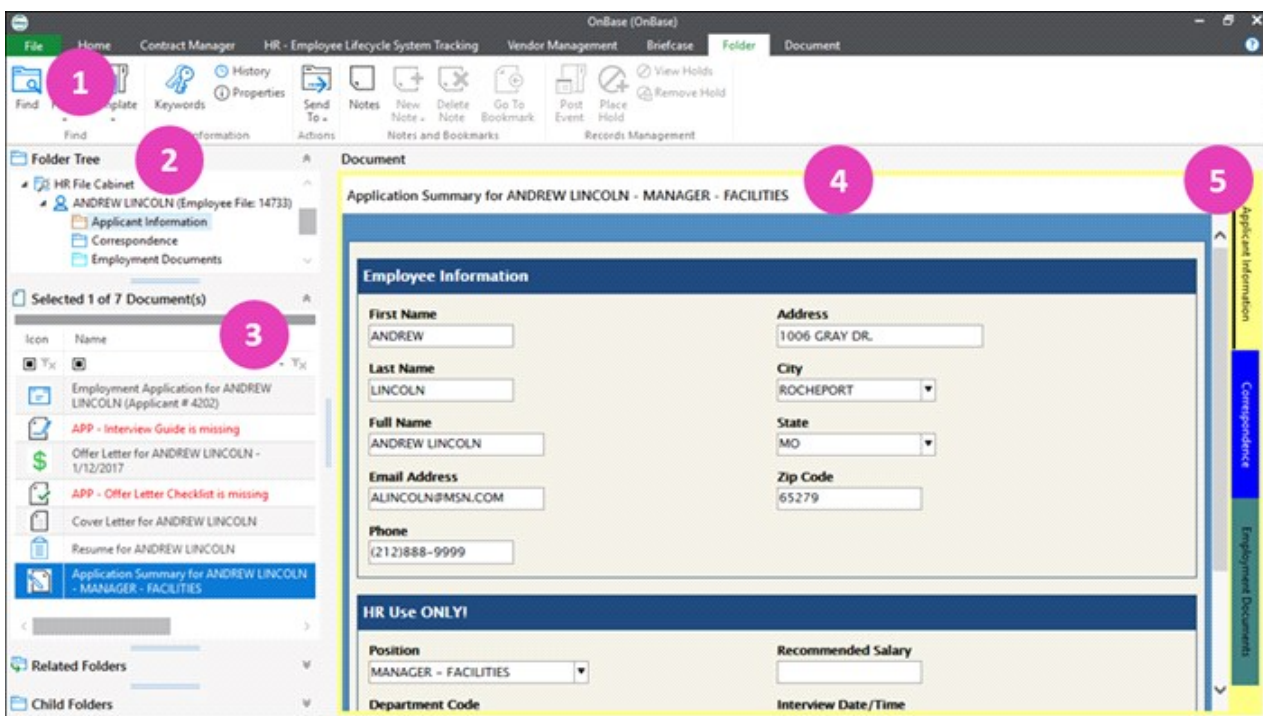
1. **Find Folder:** Search for a folder by type and keywords
2. **Folder Tree:** Displays the currently opened File Cabinet and its folder hierarchy
3. **Documents:** Displays a list of all documents in the selected folder, optionally filtered by Folder Templates
4. **Document Viewer:** Displays the currently selected document or the first document in the list by default
5. **Folder Tabs:** Customizable background color matches the currently selected tab representing child folders

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