SUMMARY

OnBase Folders (11.0) 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.

BUSINESS IMPACT

- **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

BUSINESS APPLICATION

Manage Correspondence: In the **insurance** industry, there is a great deal of correspondence activity surrounding a claim. To organize correspondence in a meaningful way, a correspondence folder can be established; sub folders further categorize the correspondence by type, while associating it with the appropriate claim. This correspondence folder is just one portion of the overall Claims folder structure.

Back File Conversion: In the **government** industry, a housing authority can create a folder for a specific customer of all important historical documentation. All back file documents will be imaged and placed into the appropriate history folder for that customer, automatically sorted by date. Folders allow related documents to be easily accessed as part of the customer file. As a result, the agency gains the ability to destroy the old paper documents, while retaining the information.

Identify Record Completeness: In the **financial services** industry, a mortgage broker can immediately identify missing, but required documents to complete a loan application. A virtual version of the typical file checklist can be created through the application 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
- **Related Folders** allow a user to "jump" between file cabinets of related folders
- **Show Folder Locations** display all folders in which a document resides from any retrieval method
- **FolderPop** extends folder interface and viewers via a URL-based rapid development tool
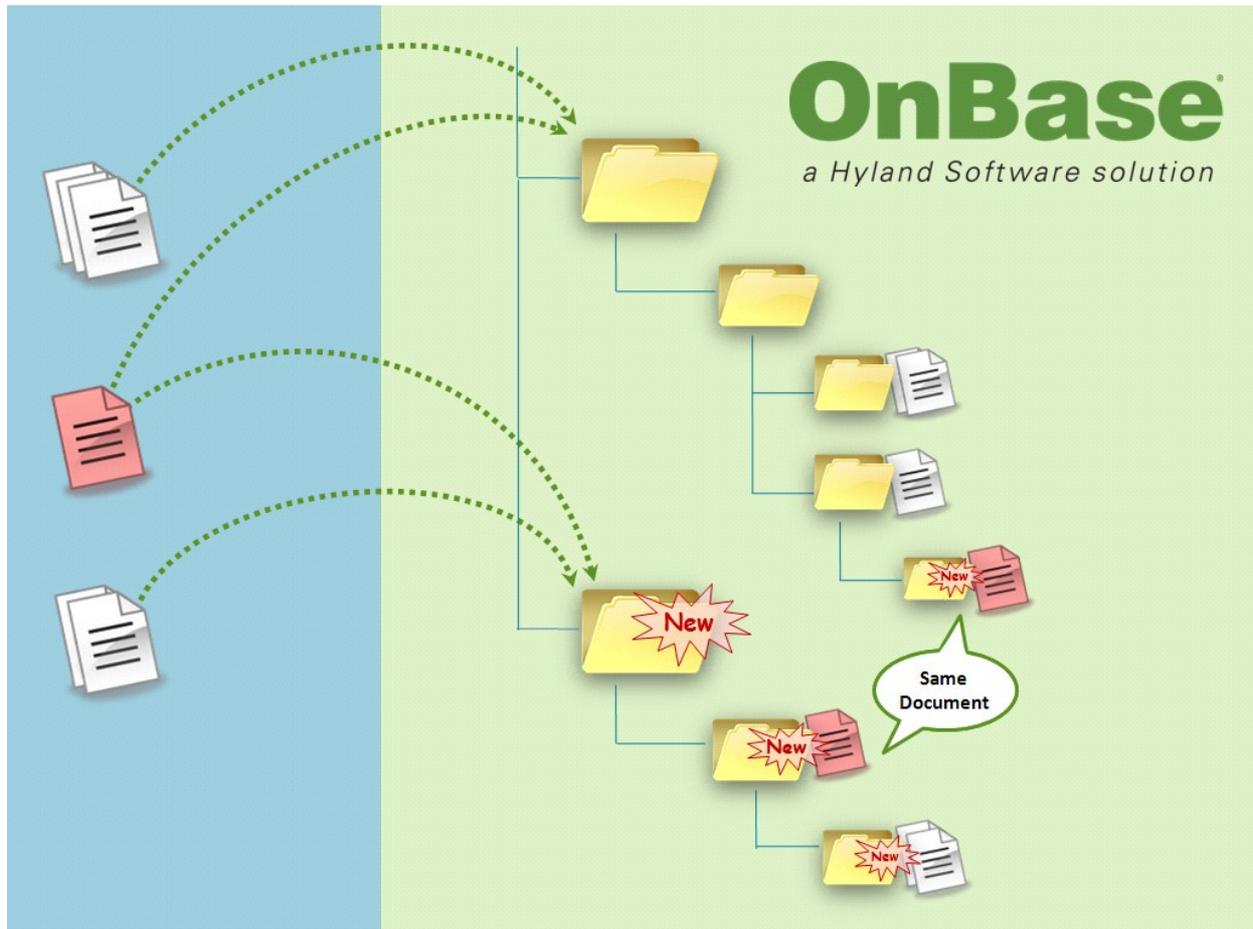
OnBase Folders can be automatically created as documents are imported. These documents (or documents that already exist in the system) are automatically placed into the appropriate folder for retrieval. OnBase provides the ability for users to store a document once, and retrieve it from a familiar folder 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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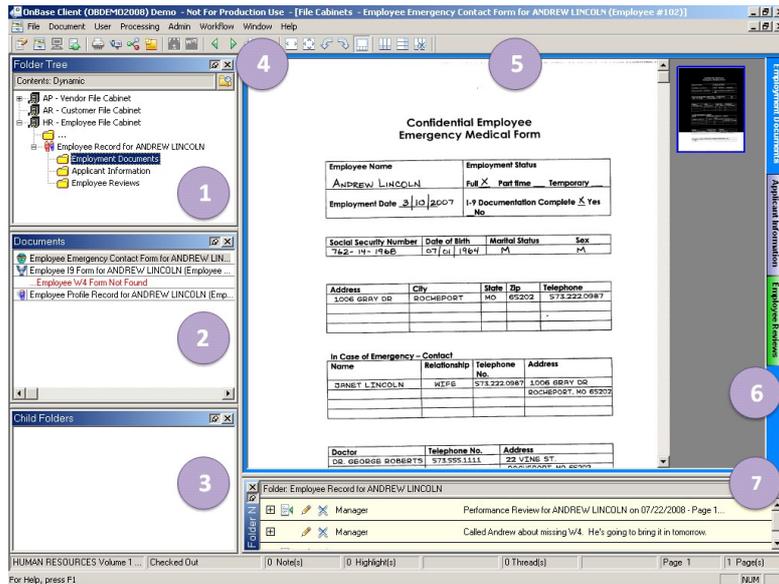
1. **Folder Tree:** Displays the File Cabinet and its folder hierarchy, includes any previous Find Folder searches, indicates that a pop-up was used to select the folders currently displaying.
2. **Documents:** Displays a list of all documents in the selected folder. Folder Templates can be applied in order to customize document display and identify any missing documents.
3. **Child Folders:** Displays Child folders (subfolders) of selected folder.
4. **Find Folder:** Search for a folder by type and keywords.
5. **Document Viewer:** Displays the currently selected document or the first document in the list by default.
6. **Folder Tabs:** Background color matches the currently selected tab.
7. **Folder Notes:** Displays folder notes with bookmarks to a specific document page.

Folders represent the way users work! OnBase Folders are comfortable and easy to understand, because they replicate physical file cabinets and folders in the paper world or when using Windows Explorer for electronic documents. OnBase Folders provides an additional interface for grouping documents for easy retrieval; presenting documents based on business need. Folders are the best way to retrieve a collection of documents and view them in one context!

Both folder creation and population (including existing documents) can be automated to ensure that the folder structure is maintained and file sorting is accurate. Finally, OnBase Folders can be used to automate indexing as documents dragged and dropped onto the folder interface inherit like keyword values based on the document type selected.