

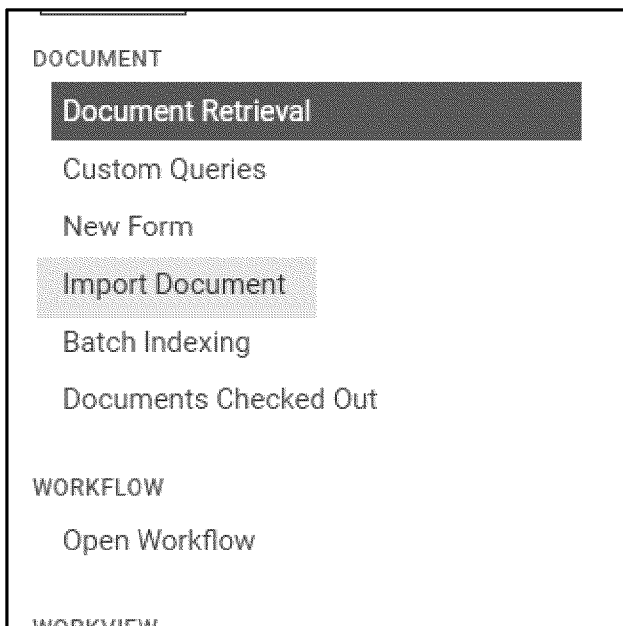
OnBase - Importing and Scanning using the Web Client

Documents that are electronically generated by third-party software, such as student or financial programs, can be programmed so they are automatically added to OnBase. Other documents need to be scanned or imported from files into OnBase.

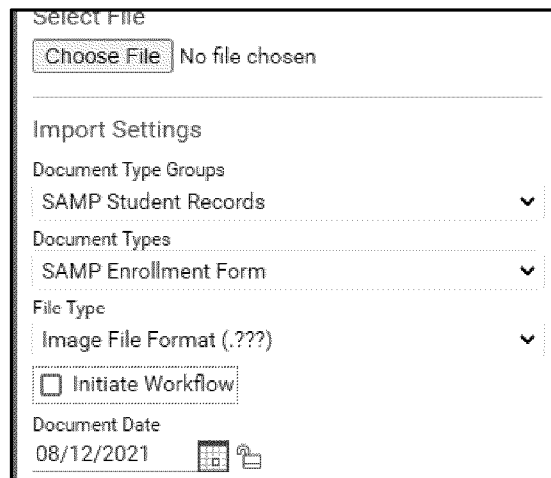
Individual documents generated by you, received by email, scanned to your computer, or sent on a disk can be added to OnBase by **IMPORTING**. Paper documents can be added directly to OnBase by **SCANNING** if you have a **Web Scanning license and Internet Explorer w/Active X**. The methods are different, but the indexing features are the same.

Importing Documents

If you have documents residing on your computer, on a disk, or that have been emailed to you, you can add them to OnBase by choosing Import Document from the Main Menu dropdown menu.




First you must tell OnBase where to find the document. Do this by clicking **CHOOSE FILE** button. This opens your computer's file window. Simply open the folder containing the file and select the document.

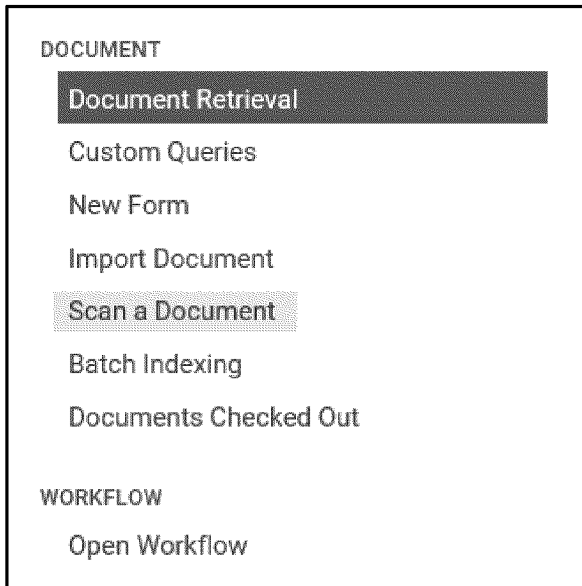


Next you will **INDEX** and **IMPORT** the document (see the section on **INDEXING** and **IMPORTING**

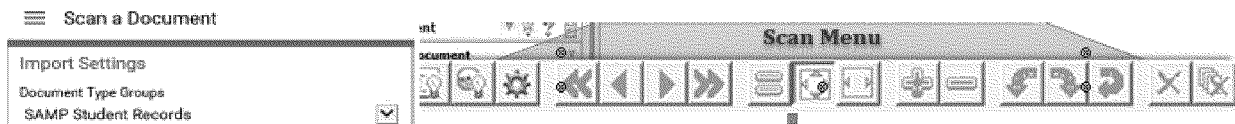
Scanning Documents

Printed documents can be added to OnBase by choosing Scan a Document for the Main Menu dropdown menu. 




If you do not have a Web Scanning license and/or access to Internet Explorer w/Active X, you will not see this menu item.



The next step is to select the scanner and format the pages being scanned. The scan format settings include the layout (portrait or landscape), the resolution, color settings and double or single sided pages. These options are determined by your scanner, not OnBase.



SCANNER CONTROLS

Scan  starts the scanner, **sweep**  pulls in documents from disk and **options**  allows you to select the scanner and scan format.

DOCUMENT CONTROLS

These controls stay grayed out until the document has been scanned. They will help you navigate the scanned documents and include options to advance pages, change the way they fit the display, zoom, rotate and delete.

After setting your scan options, you will **INDEX** and **IMPORT** the document (see the section on INDEXING and IMPORTING).

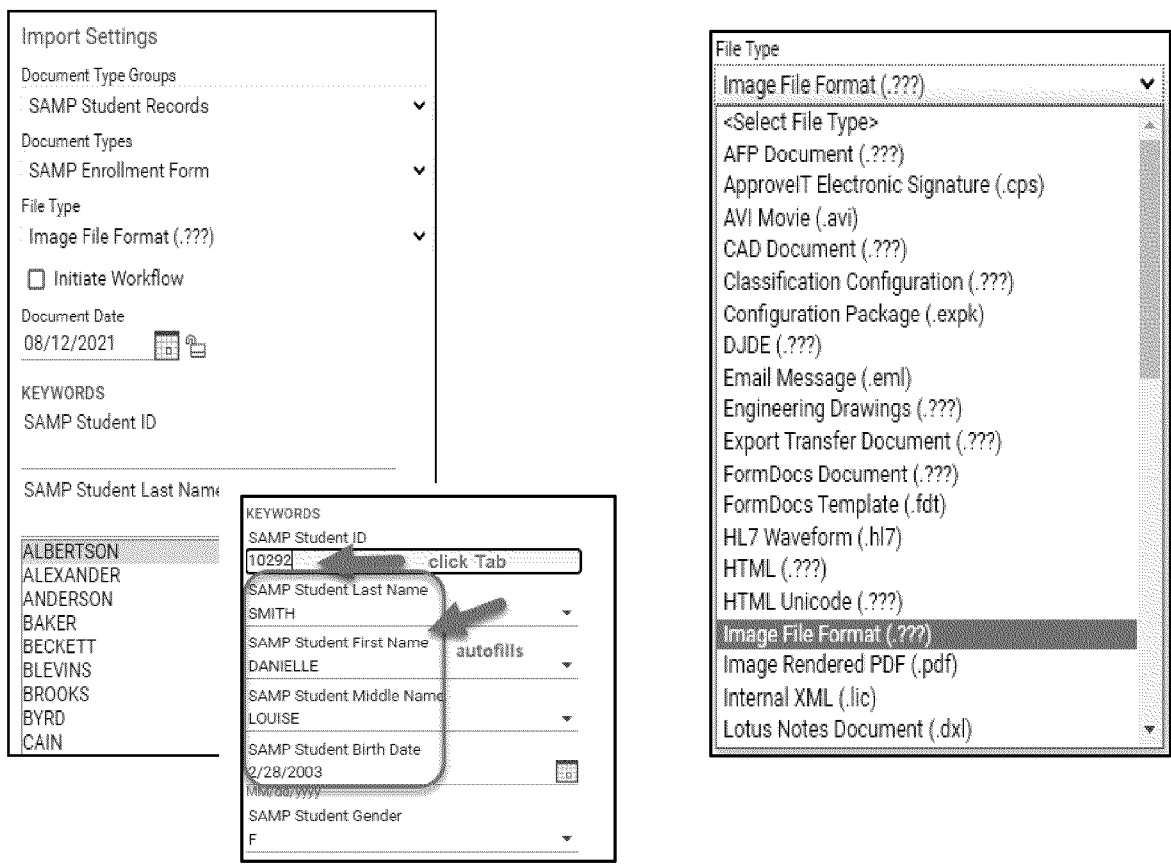
Indexing and Importing

Indexing

After you have selected the document to import, or scanned it into OnBase, you will need to **INDEX** it. This means telling OnBase where, and in what format, the document will be stored, and assigning keywords for later retrieval.

You start by choosing the **Document Type Groups** and the **Document Type** for the file. Then you must choose the correct **File Type**. This refers to the format of the document, ie: Excel, PDF, Quick Time Movie, etc. Next, you can enter a date for the document or leave the default date of the import/scan. After that, you can enter the keywords.

Some keywords will be pre-defined, and you can select. You can also enter just the first letter or letters and hit the dropdown arrow to bring up a narrower selection.



Some keywords are designed to **autofill**. For instance, a keyword group might be configured to enter the name and birthdate when the student id is entered. To use the autofill, use the **TAB** key (not the ENTER key) when entering keywords.

Importing

After the indexing has been completed, you simply hit the Import button!



NOTE:

DISCONNECTED SCANNING is an import method used for scanning large batches of documents for later indexing. The indexing works much the same way, with a few exceptions, including:



- You will choose **AWAITING INDEXING** from the Document Retrieval drop down.
- You have the option to “lock” keywords for batches where most of the keywords are the same for a large number of documents.