



INFORMATION TECHNOLOGY
Enterprise Application Systems

Hyland OnBase User Guide

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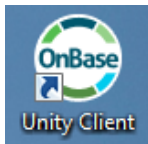
Accessing OnBase

If OnBase is not installed on your computer, please contact the Help Desk (x4357) for assistance. Your permissions within OnBase are based on your supervisor/manager's request. These requests should be directed to Sharon Shriver at sshriver@mtsac.edu.

The OnBase Unity client is not available to MAC users. Mac users can use this link to access OnBase: <https://obpw01.msac.mtsac.edu/appnet>

To begin, locate and open the OnBase Unity client.

1. Double click on the OnBase Unity Client icon on your desktop.



2. Choose the **OnBase PRD** option from the drop down menu.
3. From here, fill out the password field with your **Windows password**.

(*Note: On shared computers, you may need to change the username to your own.)

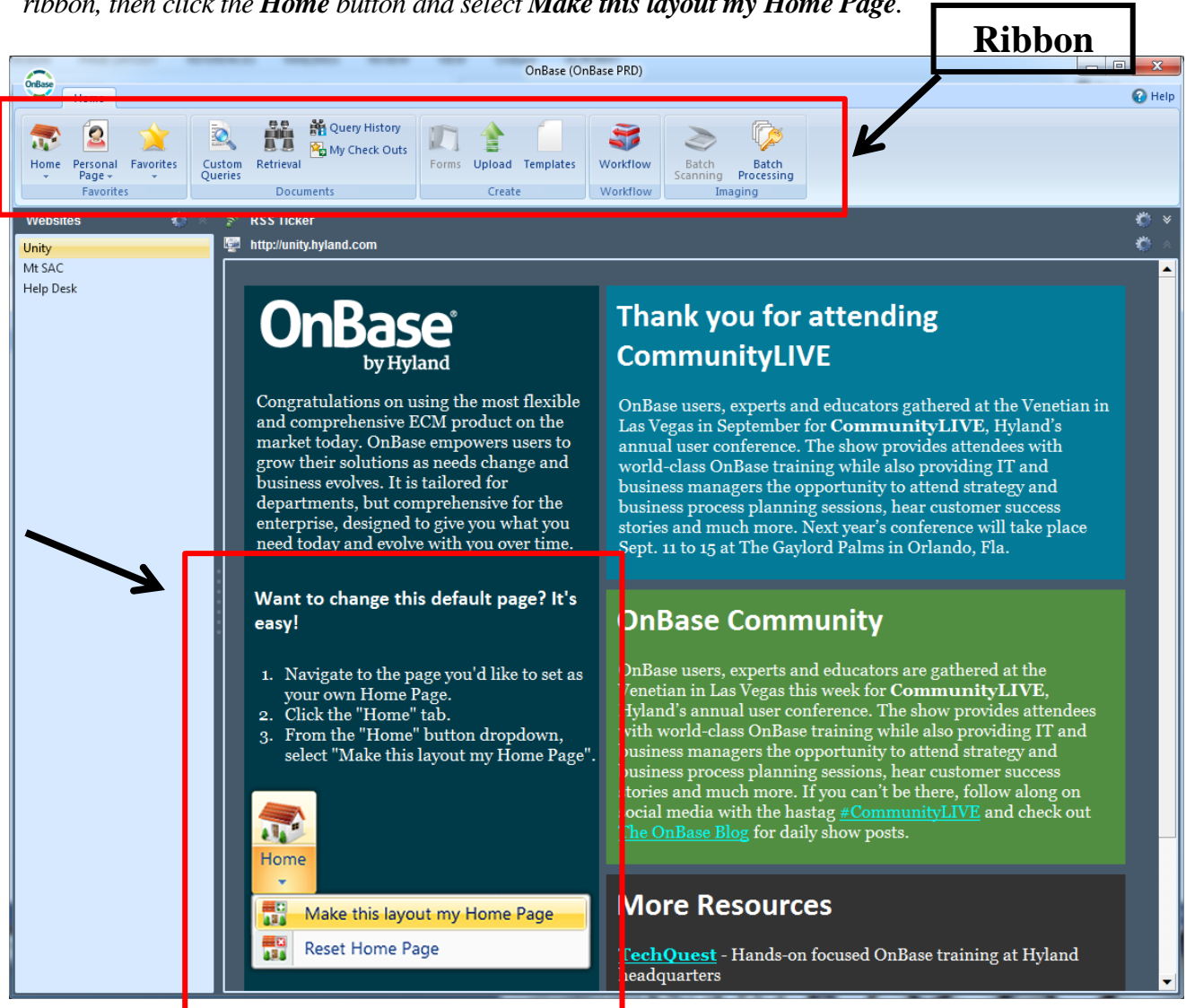
The image shows the OnBase 14 login window. The window has a dark blue header with the 'OnBase 14' logo. Below the logo, there is a copyright notice: 'Copyright © 1992 - 2015 Hyland Software, Inc. All Rights Reserved. Build Version 14.0.1.97'. The main area of the window contains a login form with a dropdown menu, three text input fields, and two buttons. The dropdown menu is highlighted with a red box and contains the text 'OnBase PRD'. The first text input field contains 'MSAC', the second contains 'eojeda', and the third is empty. The buttons are labeled 'Login' and 'Cancel'.

4. Click **Login** or press the Enter key on your keyboard to login to OnBase.

OnBase Home Page

The Home Page is the default page after you log in. The Home Page can be customized. (See instructions below.)

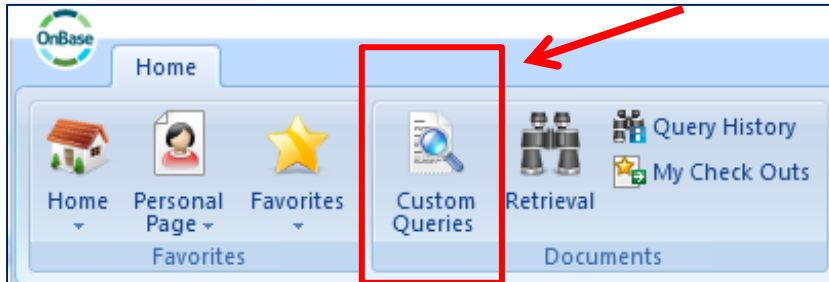
*Example: You can set your Home Page to the Retrieval screen by clicking on the **Retrieval** button on the ribbon, then click the **Home** button and select **Make this layout my Home Page**.*



Document Retrieval by Custom Query

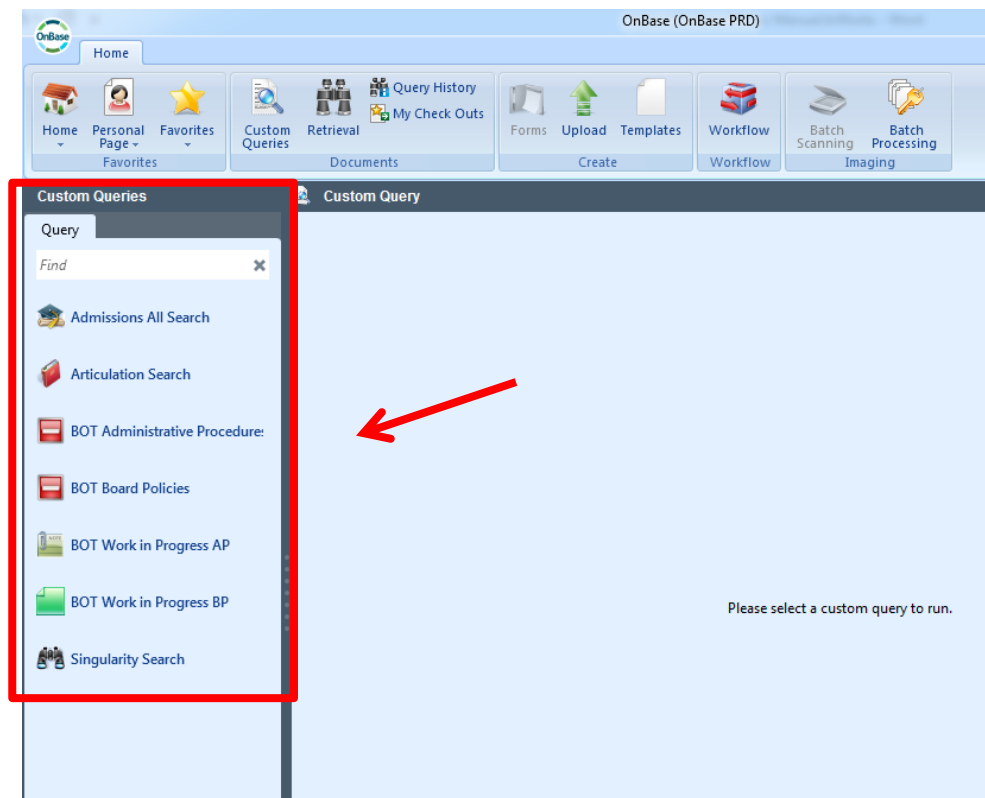
There are two methods to retrieve documents in OnBase. The first is Custom Query. Custom Query uses a search form to allow users to easily retrieve preexisting documents in OnBase.

1. Start by clicking on the **Custom Queries** in the ribbon.



2. Click on a query to open the query form.

**Note: Query views vary. You will ONLY see the Queries and documents within a query that you have access to.*



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3. Fill in the field(s). At least one field is required. Then press enter or click the **Search** option to display your results.

Note: You may use the asterisk () wild card in the fields below. The (*) represents one or more characters (i.e. a search for LA* could bring up documents containing words such as Lane, Lake, or Lands).*

The screenshot shows the OnBase (OnBase PRD) interface. The main window is titled 'OnBase (OnBase PRD)'. The top navigation bar includes 'Home', 'Personal Page', 'Favorites', 'Custom Queries', 'Retrieval', 'My Check Outs', 'Forms', 'Upload', 'Templates', 'Workflow', 'Batch Scanning', and 'Batch Processing Imaging'. The 'Custom Queries' section is active, showing a list of queries on the left and the details of the 'Admissions All Search' query on the right. The query details include a description: 'This Query will search all Admissions Documents that have a Banner ID. It will retrieve on Banner ID, Last Name, First Name and Student ID.' Below this are 'Date Options' with 'From' and 'To' dropdowns. The search fields are: Banner ID, Last Name, First Name, Date of Birth, and Student ID. A callout box with a blue border and a tail pointing to the fields contains the text 'Fields are defaulted to caps.' At the bottom right, the 'Search' button is highlighted with a red rectangular box. A 'Clear' button is located at the bottom left of the search area.

You can click on any of the **Column Titles** in the results list to **rearrange** documents in ascending or descending order.

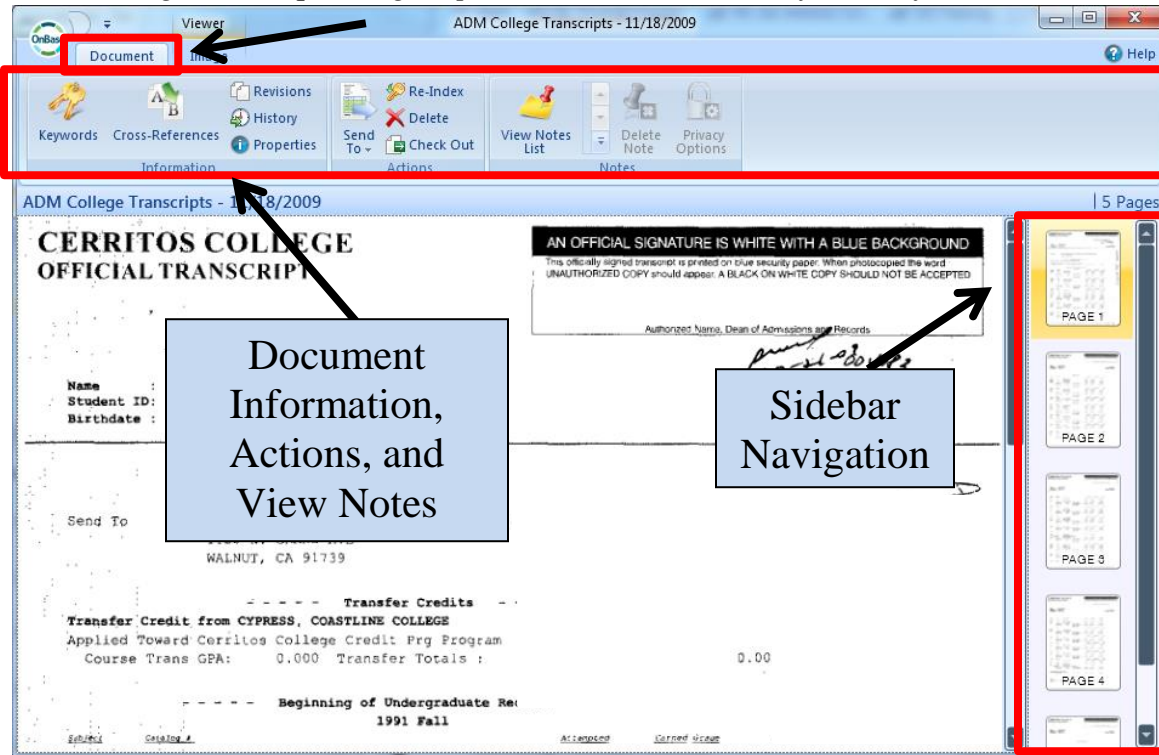
The screenshot shows the OnBase (OnBase PRD) interface displaying search results for 'Admissions All Search'. The main window is titled 'OnBase (OnBase PRD)'. The top navigation bar is the same as in the previous screenshot. The 'Custom Queries' section is active, showing a list of queries on the left and the details of the 'Admissions All Search' query on the right. The query details include a description: 'This Query will search all Admissions Documents that have a Banner ID. It will retrieve on Banner ID, Last Name, First Name and Student ID.' Below this are 'Date Options' with 'From' and 'To' dropdowns. The search fields are: Banner ID, Last Name, First Name, Date of Birth, and Student ID. A callout box with a blue border and a tail pointing to the fields contains the text 'Fields are defaulted to caps.' At the bottom right, the 'Search' button is highlighted with a red rectangular box. A 'Clear' button is located at the bottom left of the search area.

Icon	Document Date	Document Type	Last Name	First Name
	10/12/2015	ADM High School Transcripts	GUTIERREZ	ANDREA
	9/21/2015	ADM Graduation Degree Petition	GUTIERREZ	ANDREA
	8/6/2015	ADM College Transcripts	GUTIERREZ	ANDY
	6/4/2015	ADM High School Transcripts	GUTIERREZ	ANDREA
	10/8/2013	ADM High School Transcripts	GUTIERREZ	ANGELO
	7/9/2013	ADM High School Transcripts	GUTIERREZ	ANGELA

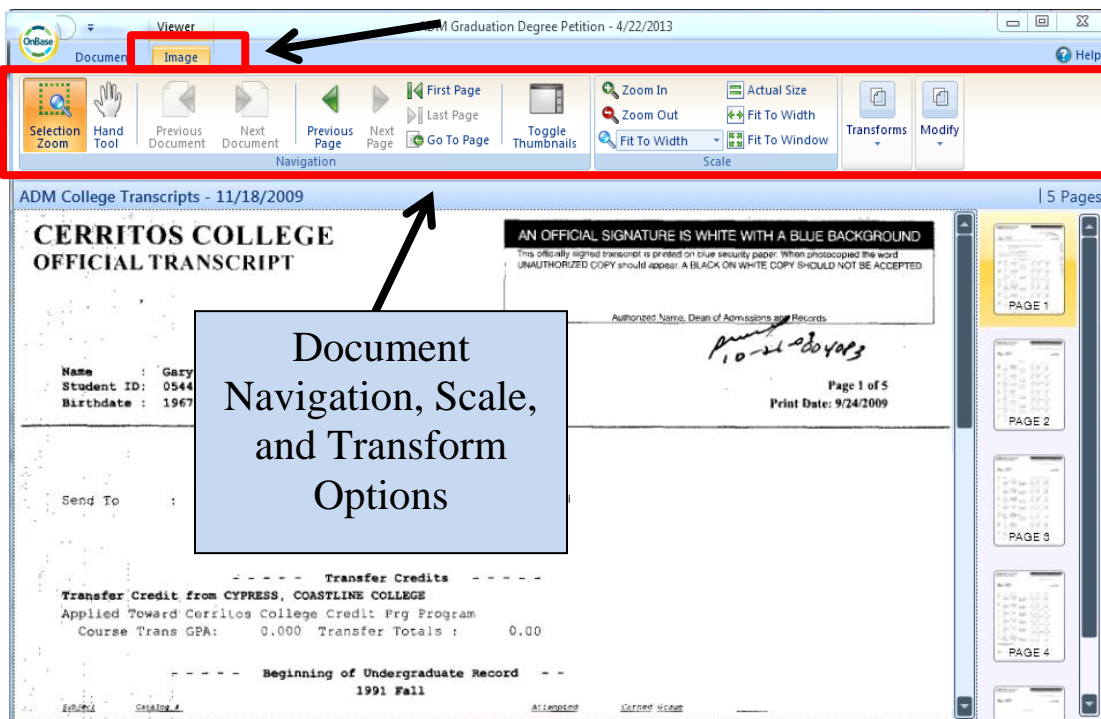
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4. **Double click** on the file that you want to view. The Document Viewer will now open.

Note: You can view keywords and re-index, if needed. Some features like Re-Index and Adding Notes require higher permissions. The Cross-References feature is not available.

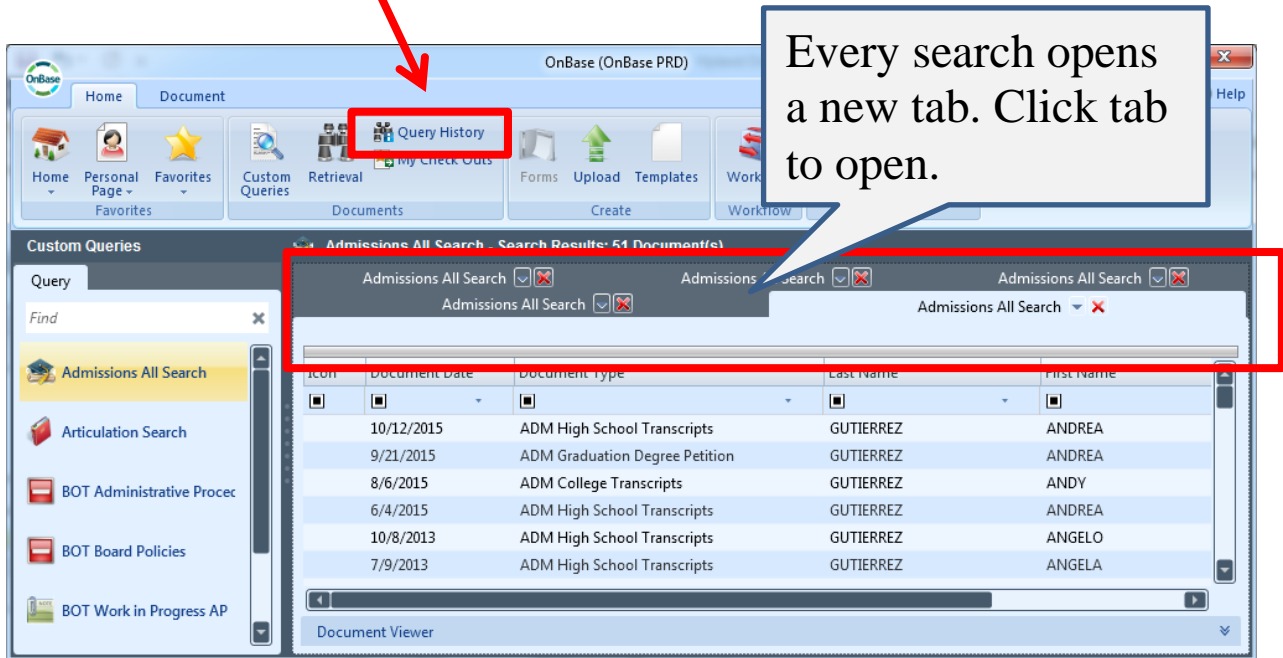


To modify the image click on the **Image** tab on the document viewer ribbon.



- To begin a new search close the document viewer window and select custom query. Repeat steps 2-4.

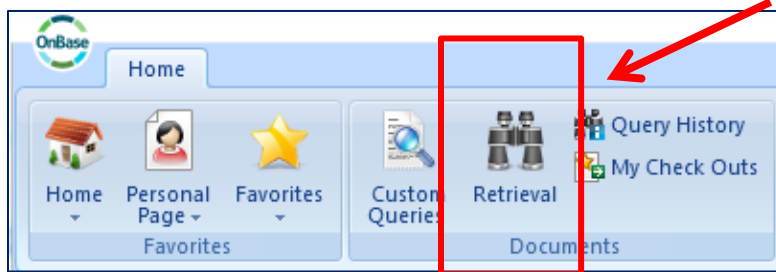
Note: The **Query History** option in the home ribbon allows you to view query history for your current login session.



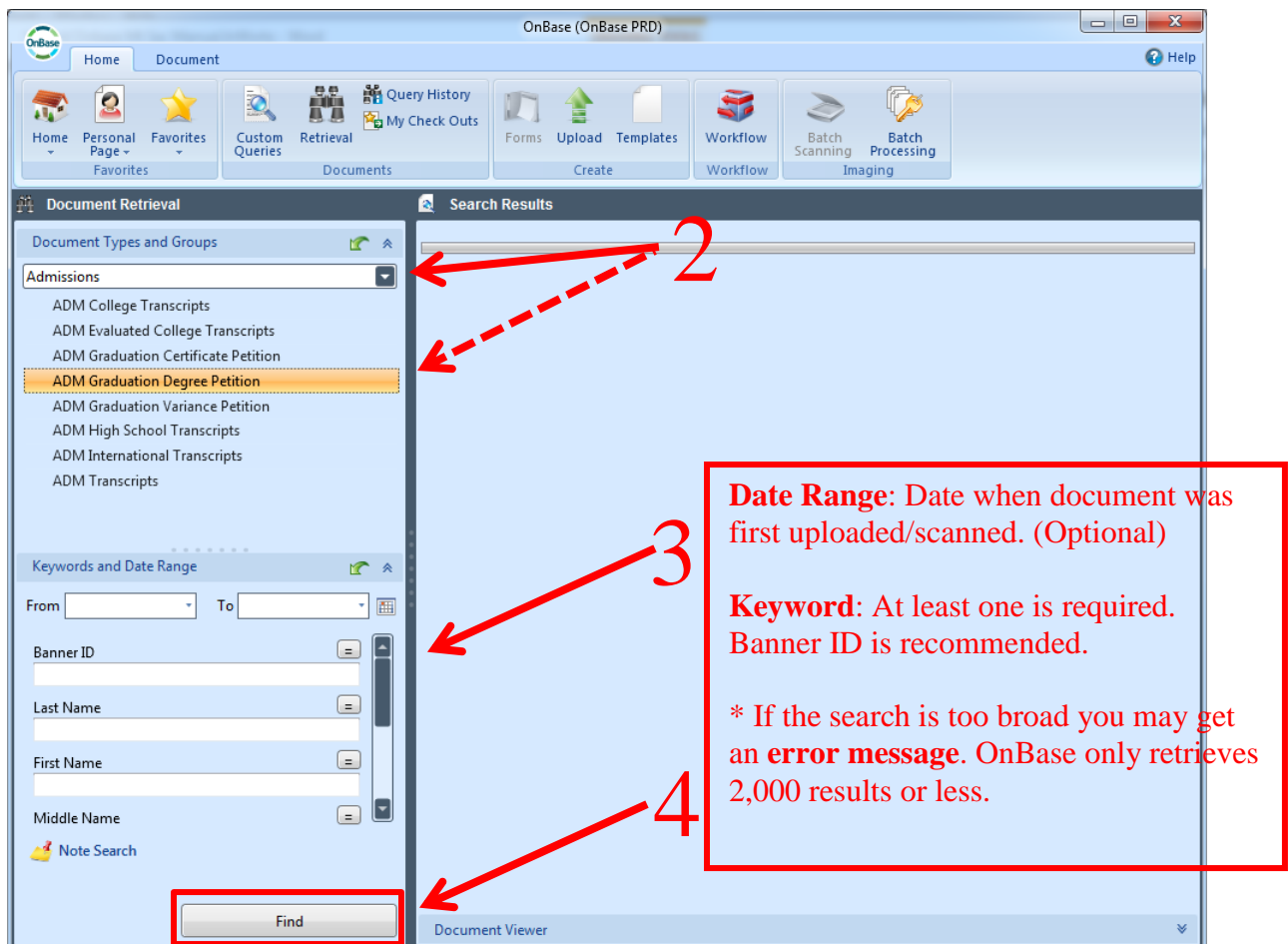
Document Retrieval by Document Type

The second method to retrieve a document is to search by Document Group and Type.

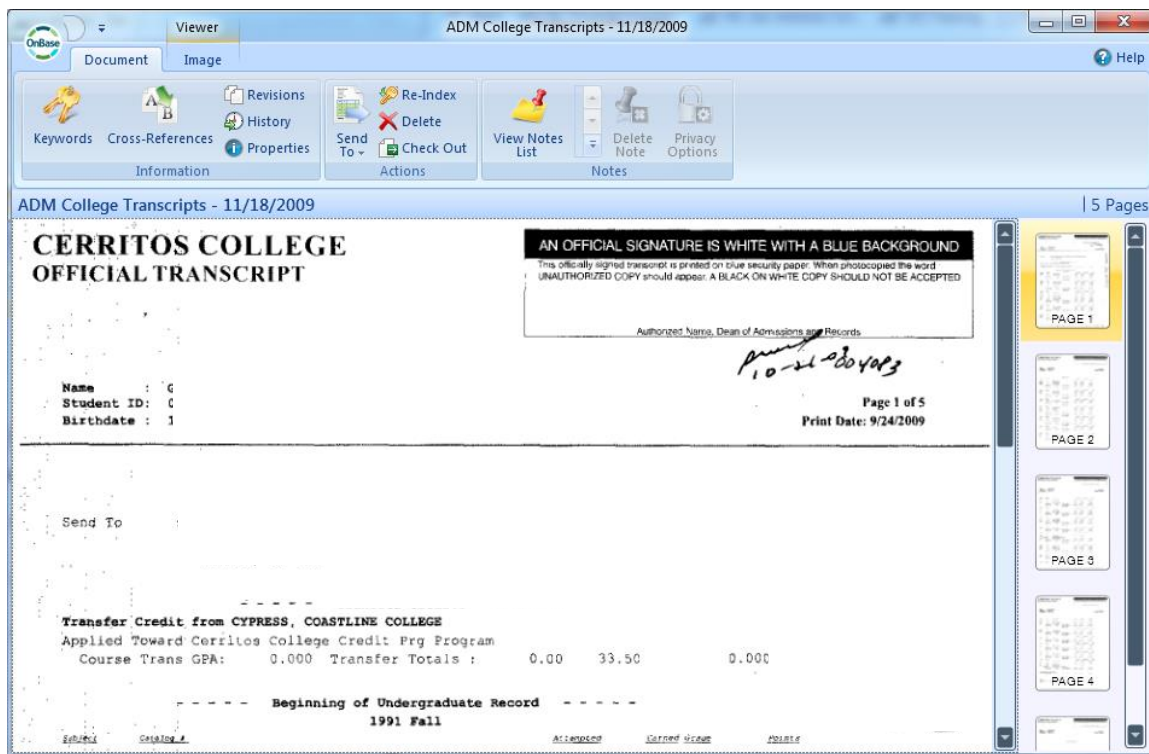
1. Click on the **Retrieval** icon in the ribbon.



2. Choose the **Document Group** then select the **Type**.
3. Fill in the **Keywords** or **Date Range** to narrow results. At least one keyword is required. *(Note: You may use the asterisk (*) wild card in the keyword fields. The (*) represents one or more characters (i.e. a search for LA* could bring up documents containing words such as Lane, Lake, or Lands.)*
4. Press enter or click **Find** to bring up your results.

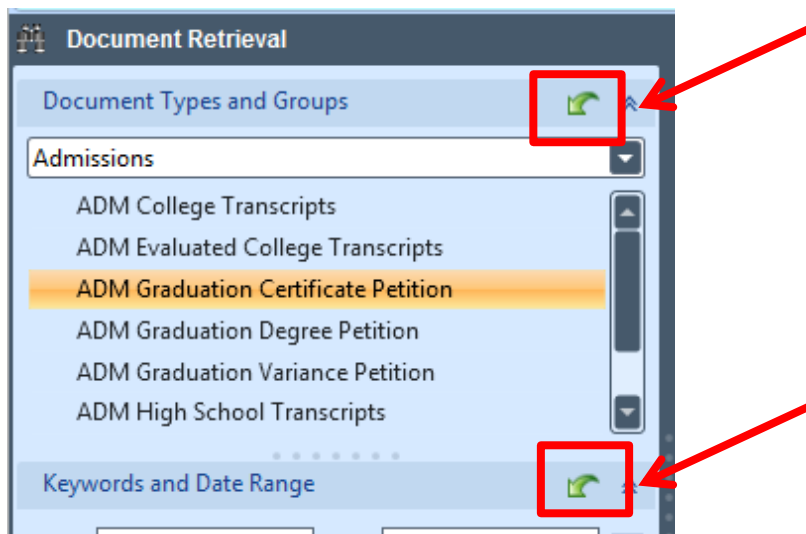


5. **Double click** on the file that you want to view. The Document Viewer will open.
(See page 6 for document options.)

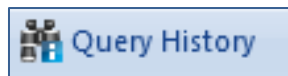


6.

7. For a new search close the current document viewer window then click the green arrow on the Document Types title or green arrow by Keywords to clear Keywords and Date Range.



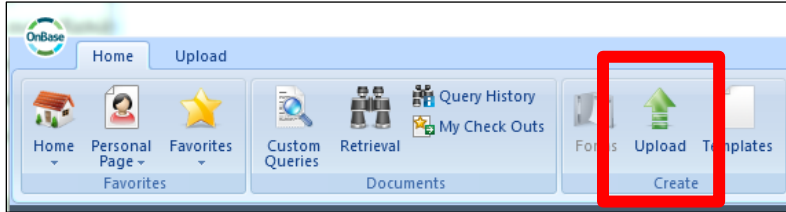
Note: The **Query History** option on the home ribbon allows you to view query history for your current login session.



Document Upload

Upload is an OnBase feature that allows users to import directly to OnBase. Users must have appropriate permissions to use this feature.

1. Click the **Upload** icon on the home ribbon.



2. Click the **Browse** icon in the upload screen. In the browse window select the file and click **Open**.

You will see a preview.

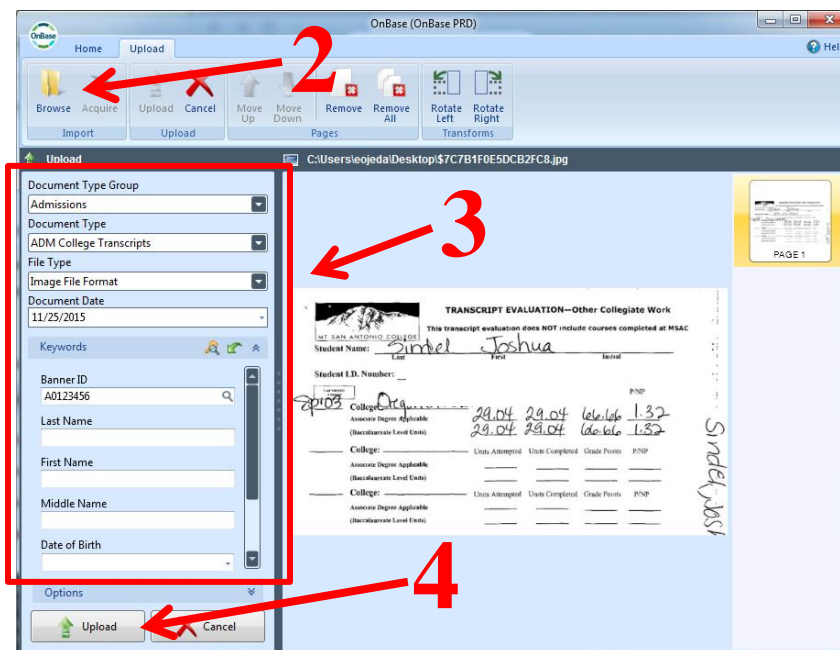
3. Index (required):

- **Document Type Group** – Choose the department that pertains to the scanned document.
- **Document Type** – Choose the document type for the scanned document.
- **File Type** – In most cases will be left at default (Image File Format).
- **Document Date** –The document’s scanned date. It is filled automatically.

Keywords:

- *Input the **Banner ID** associated with the document, **then click on any field to autofill the Name & DOB or hit the tab key on your keyboard.**
- Check with your department on what other Keywords will be required.

4. Click **Upload**.

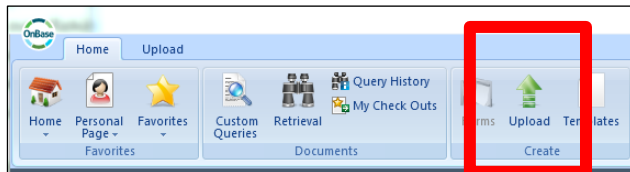


Scanning and Indexing

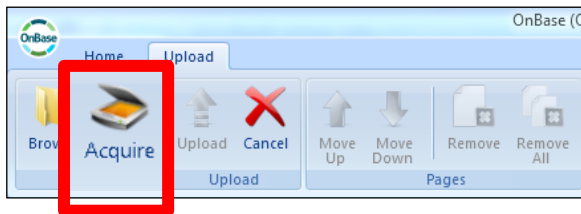
Upload is an OnBase feature that allows users to scan and upload documents directly to OnBase. Scanners must be pre-configured and only those users with scan permissions can use this feature. **Scan one document type for each Banner ID number (student or employee) at a time.**

Example: If you have multiple document types for Joe Mountie A0123456789 (such as transcripts, petition to graduate, and appeal forms) place ONLY the transcripts in the scanner and follow steps 1-6 below. Repeat this process for the remaining document types.

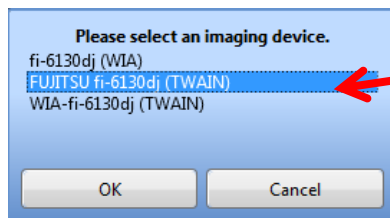
1. Click the **Upload** icon on the home ribbon.



2. Click the **Acquire** icon in the upload screen.

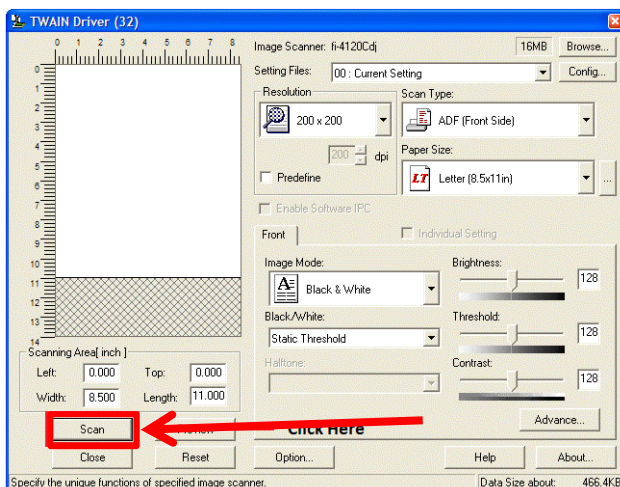


3. Choose the scanner that is connected to your workstation and click **OK**.

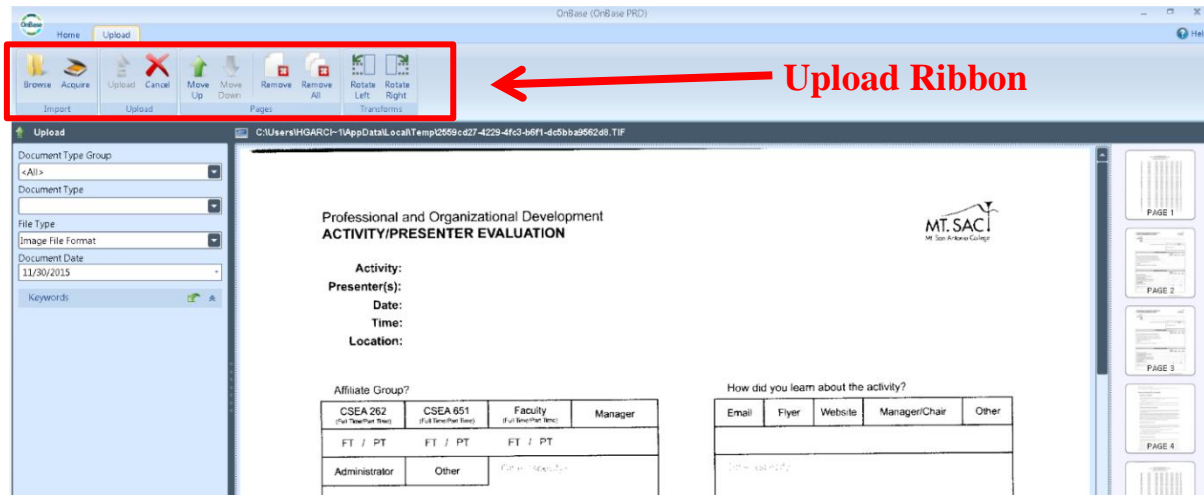


Scanner must end with (TWAIN)

4. Click **Scan** on the settings window. (Image mode should be set to Black and White and resolution set to 200x 200. 300x300 maximum.)

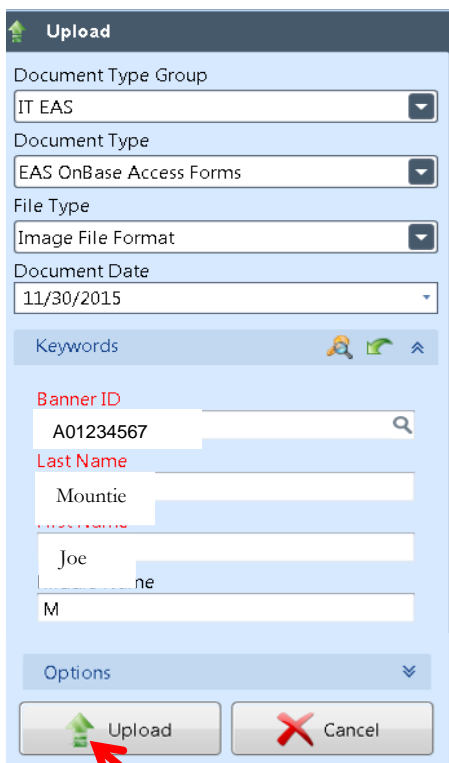


A preview of the scanned documents should now be displayed. In the upload ribbon, you can **add, delete, or re-scan pages**.



Indexing

5. Select Document Type Group, Document Type, and enter Banner ID to autofill Keywords.



- **Document Type Group** – Choose the department that pertains to the scanned document.
- **Document Type** – Choose the document type for the scanned document.
- **File Type** – In most cases will be left at default (Image File Format).
- **Document Date** – The document’s scanned date. It is filled automatically.

Keywords:

- Input the **Banner ID** associated with the document, hit your tab key to populate Name & DOB.
- Check with your department on what other Keywords will be required.

6. Click **Upload**- after all information is completed. A new preview window will open after you click upload to confirm upload.

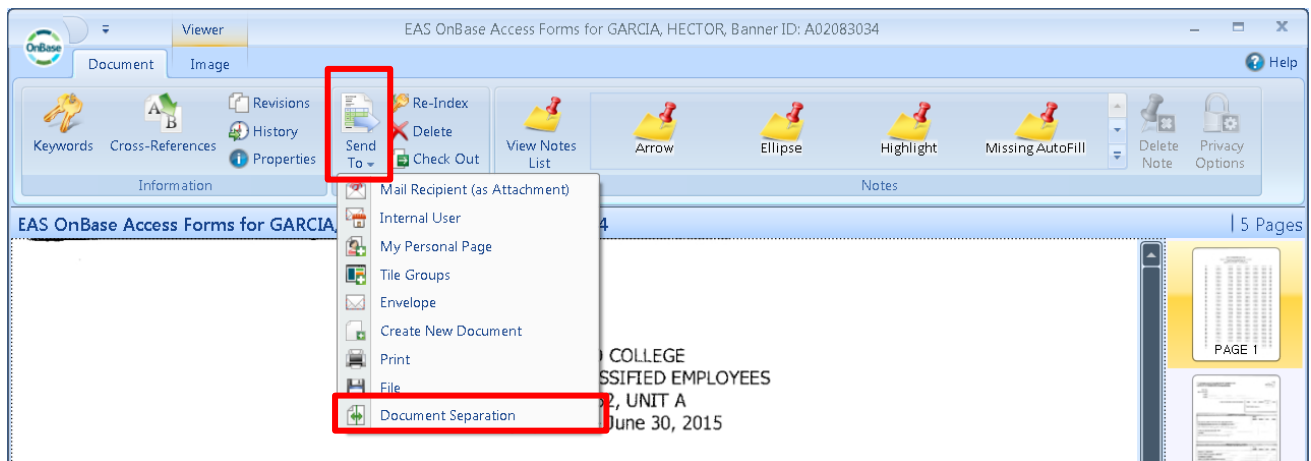
Scanning and Document Separation

The document separation feature in OnBase allows users to scan multiple document types at one time and index them accordingly. Follow the steps below.

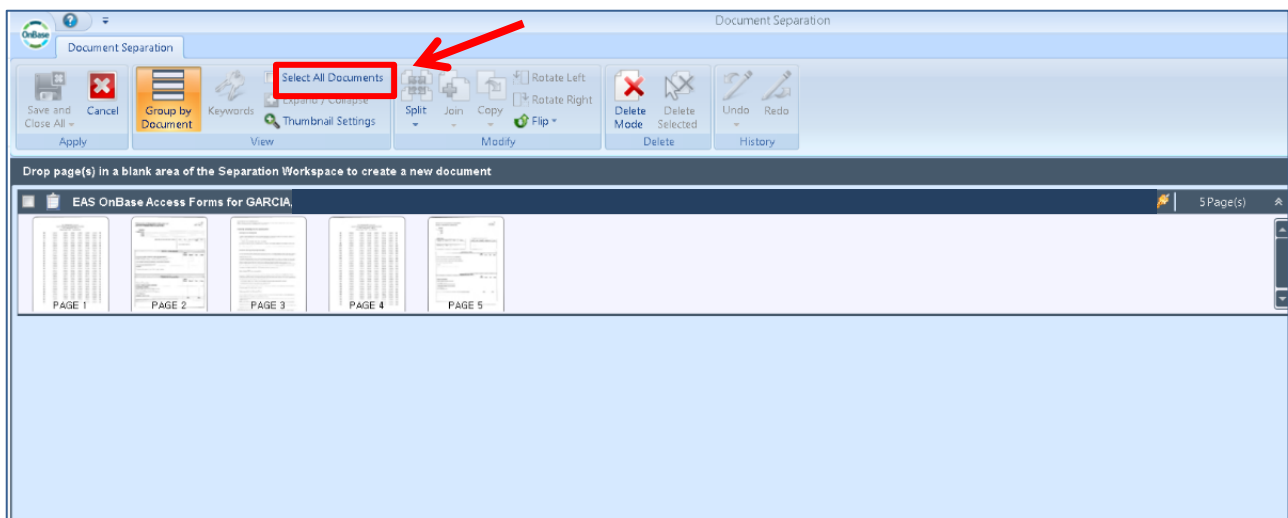
1. To begin scanning, place all documents in the scanner and follow steps 1-6 on pages 11 and 12.

The pages scanned may be different documents (transcripts, applications, forms, etc.), but OnBase recognizes them as one document, since they were scanned at once. These pages need to be separated first then moved (re-indexed) to their correct document group and type. To facilitate this, we will start by entering the first document's (1st page scanned) Type Group, Document Type and Banner ID.

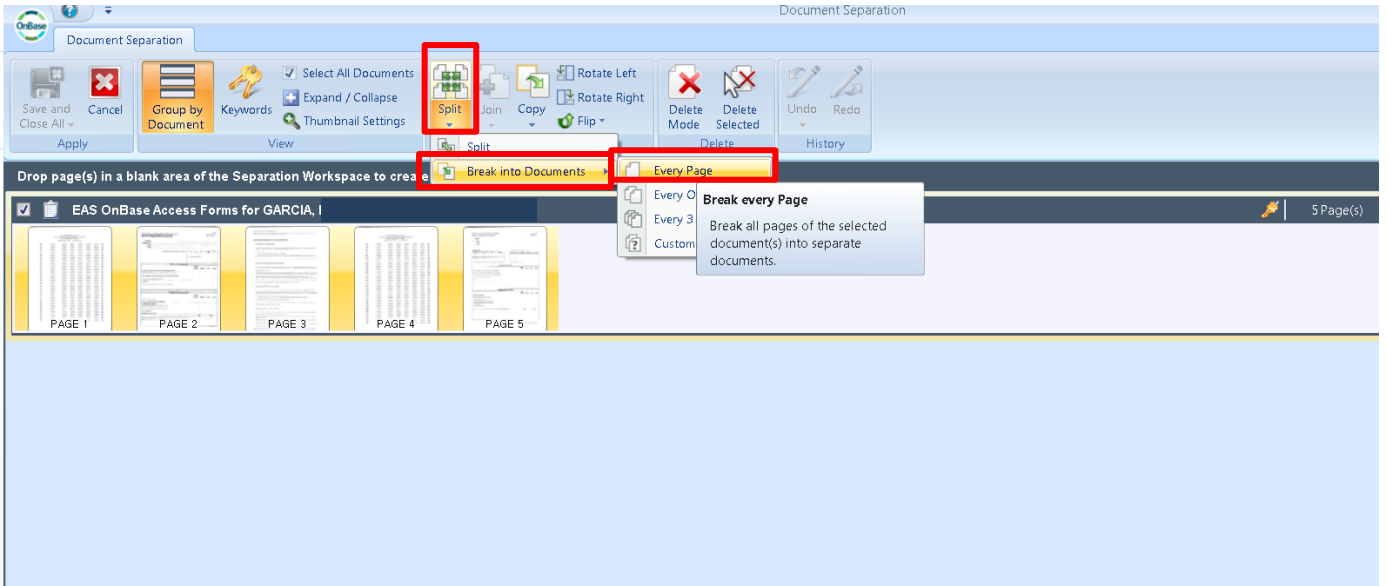
2. In the new window, in the **Send To** options click on **Document Separation** or right-click on the page for the same options.



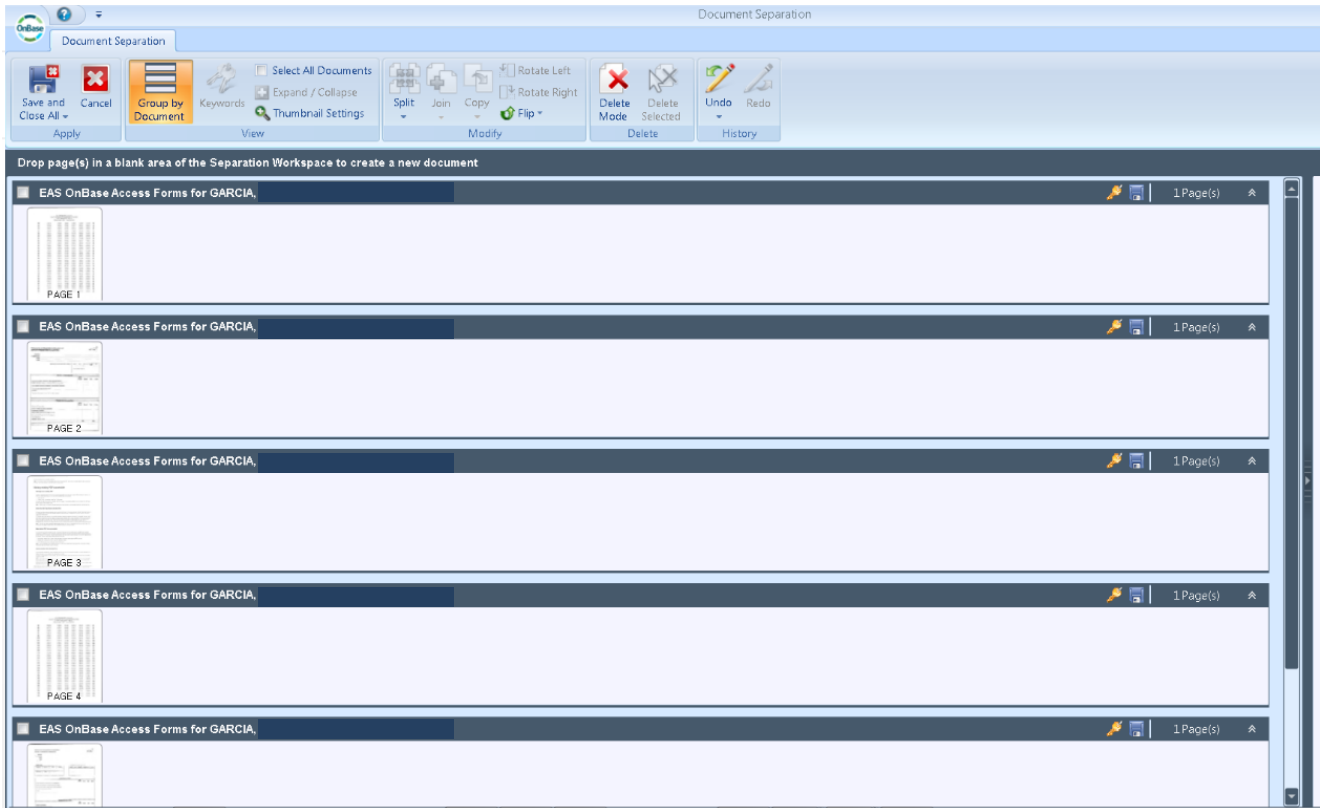
3. Click **Select all Documents**.



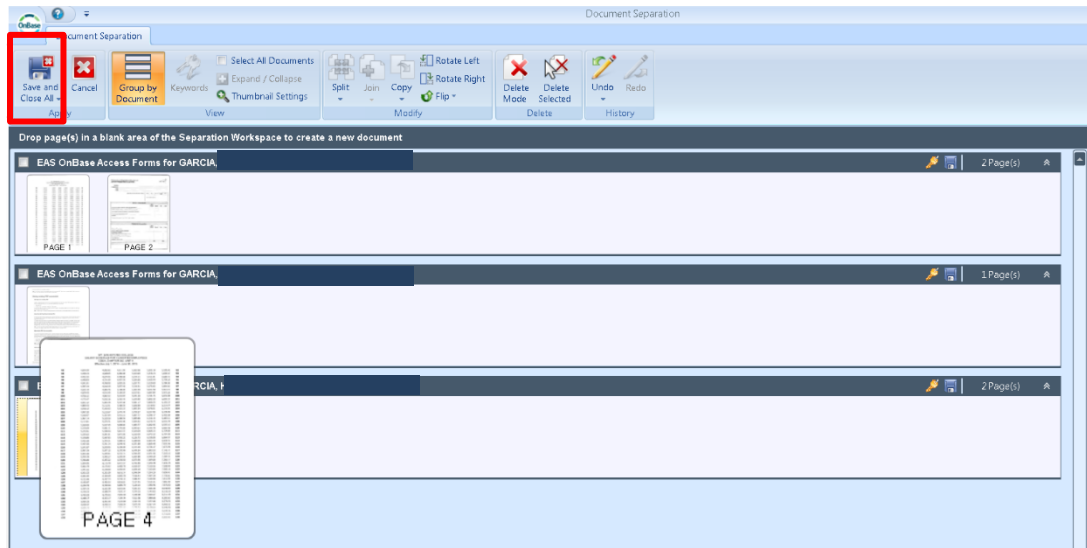
4. Under the Split options, select **Break into Documents** then click on **Every Page**.



You should now see something similar to this window.



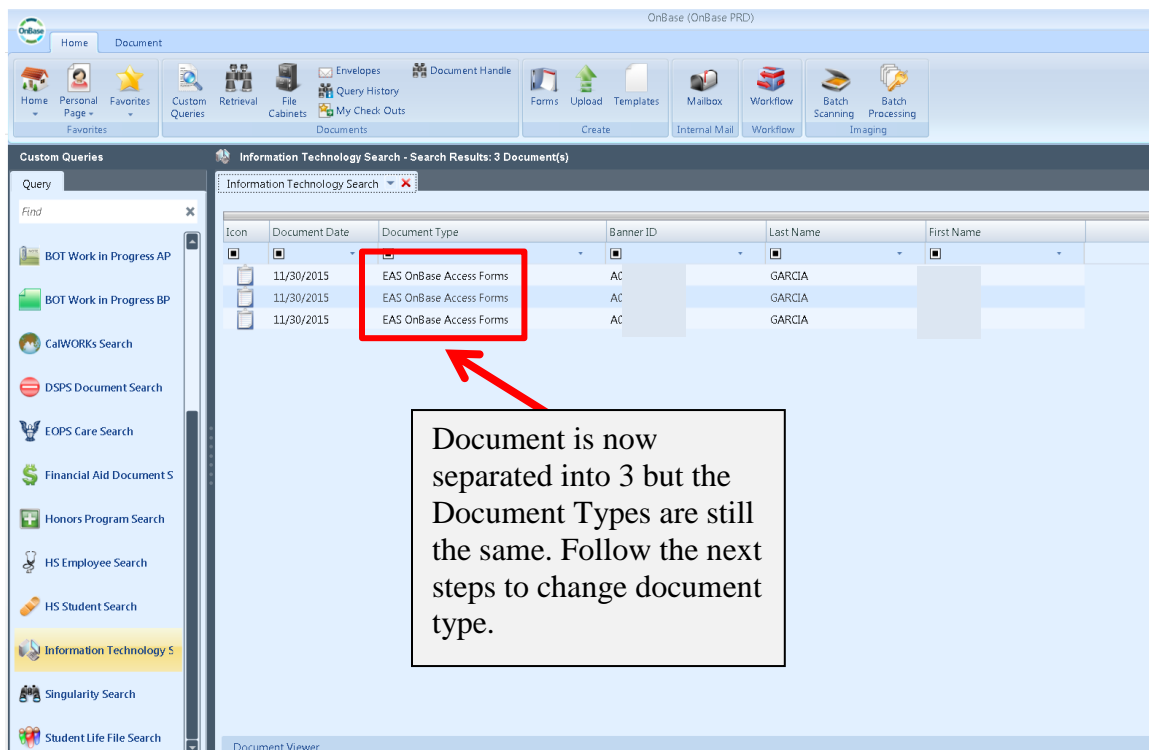
5. Click and drag the pages to the appropriate row to match by document type.



6. Click **Save and Close** on the ribbon.

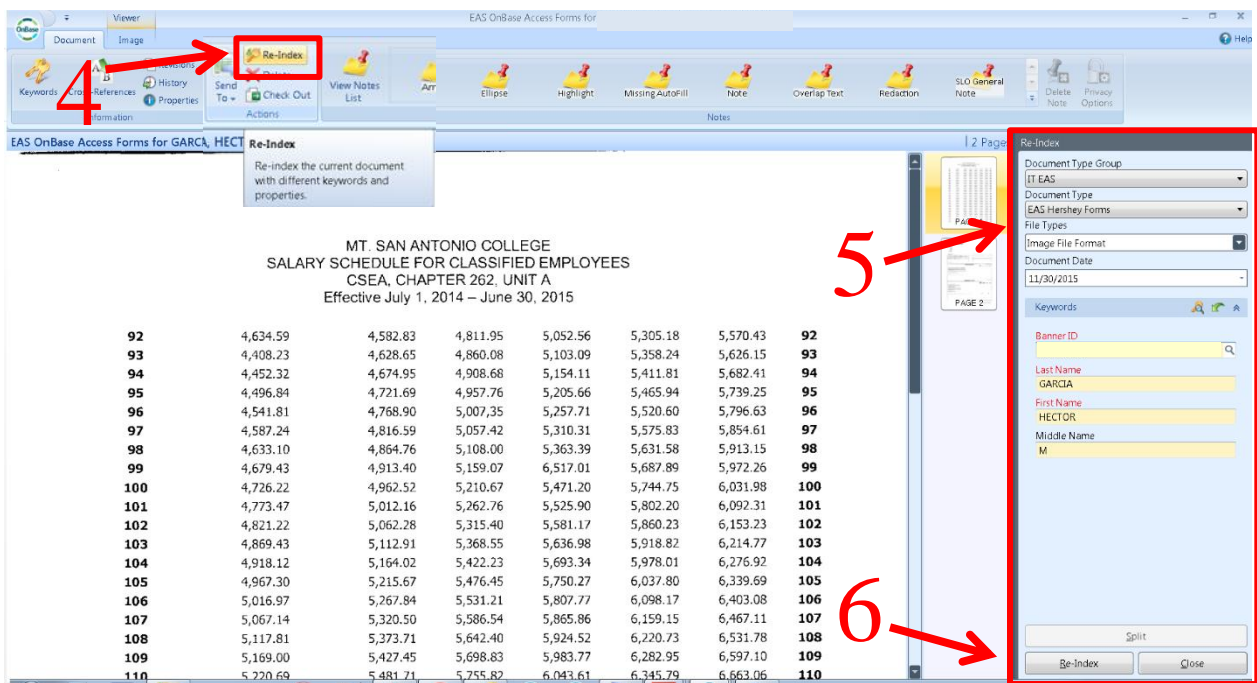
Now that the pages are separated accordingly, you will now need to retrieve the documents to re-index them to their correct group and type.

1. Perform a Custom Query to retrieve the documents (see page 4). Match the query to the group type that you selected in the beginning for the first scanned page. It is recommended to search by Date Option (scan date).

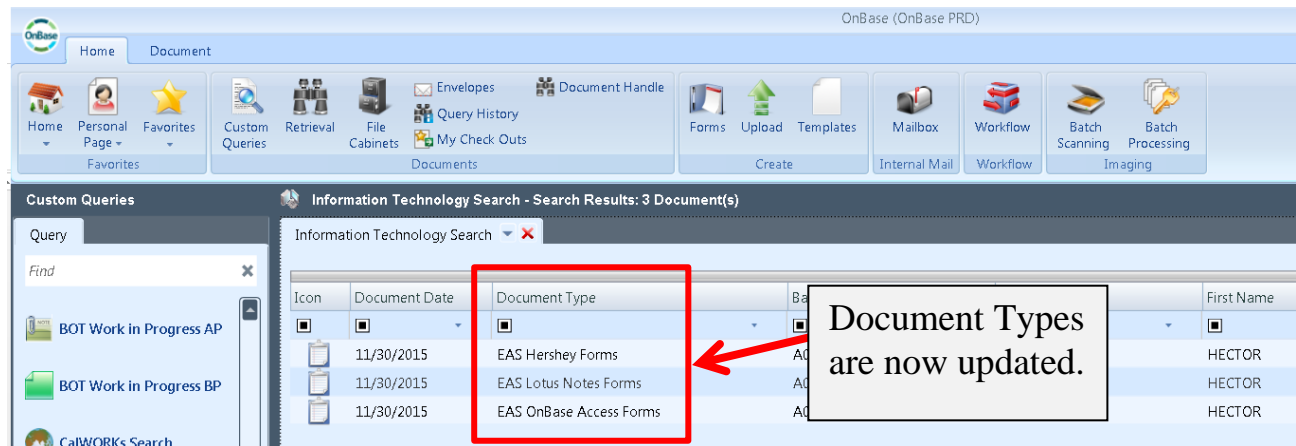


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2. **Double-click** on the first document to open and verify that it is indexed correctly (correct Document Type Group and Document Type). Close the window when finished.
3. **Double-click** on the second, or following, document in the query search results. The document viewer will now open.
4. Click on the **Re-Index** icon on the ribbon to display options.
5. Enter the correct the **Document Type Group** and **Document Type** for that document.
6. Click **Re-Index** when finished.



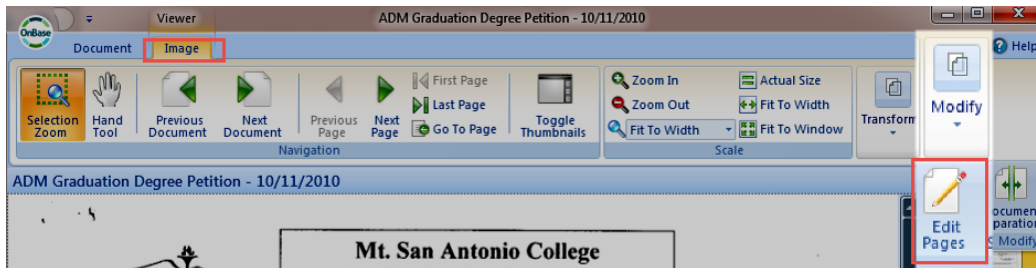
7. Follow steps 3-6 for the rest of the documents that need re-indexing.
8. When finished, re-start the query to display updated Document Types.



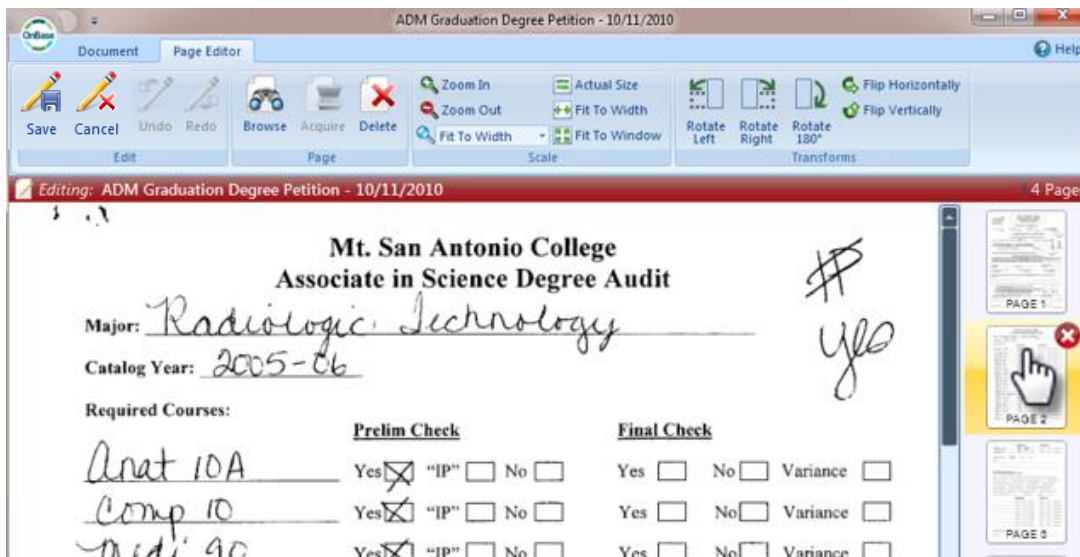
Deleting and Re-Ordering Pages

Deleting and re-ordering pages within a document can be done after the document was originally scanned. If there is a need to perform any of the above follow the steps below.

1. Open the document and click on the **Image** tab.
2. Click on **Modify** to select the **Edit Pages** option.



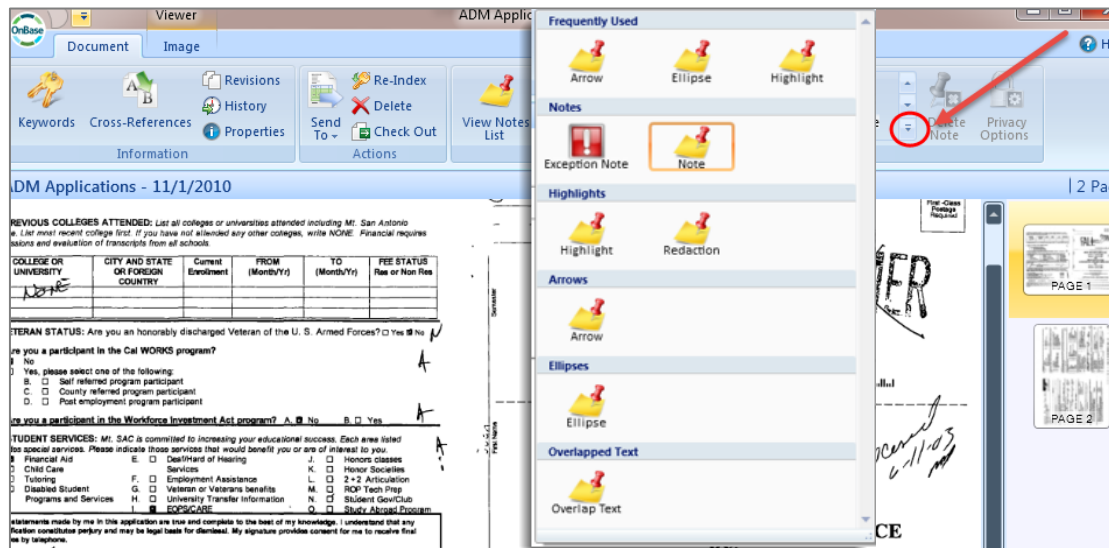
3. **Click and drag** pages from the side navigation to re-order pages.
4. To delete pages, click the **red x** on the upper right hand corner.
5. When all changes are made, click **Save** on the ribbon.



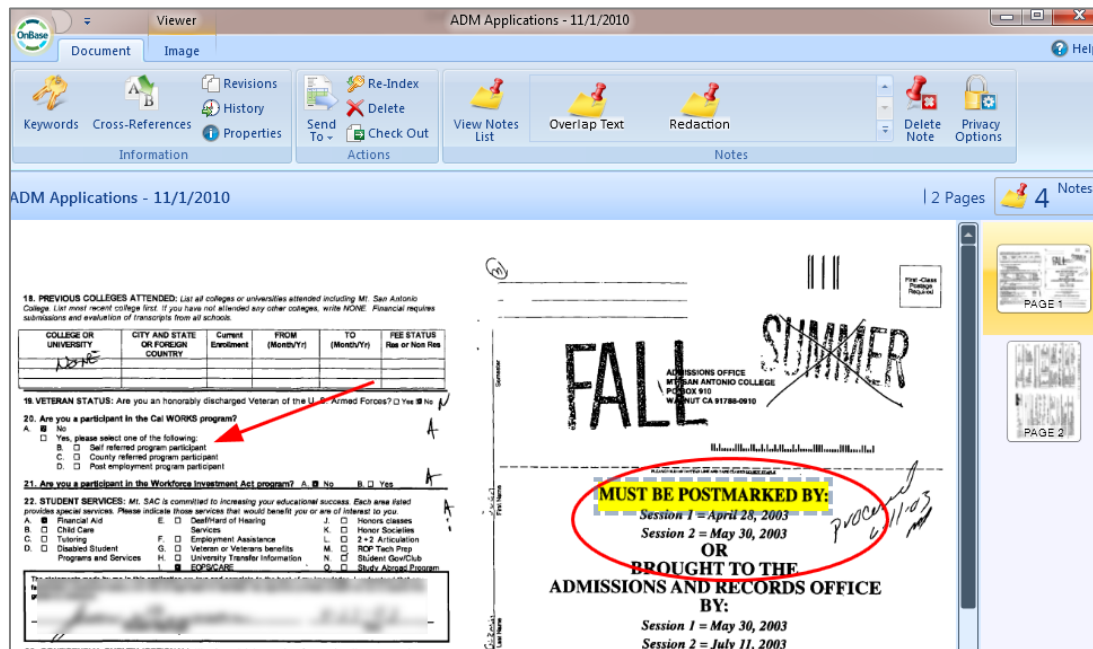
Highlights, Annotations, and Notes

Users with the appropriate permissions can add and delete highlights, annotations and notes to a document/image. These marks will be available to other users as view only.

1. To begin open the document and click on **Document** tab. (You can use the Image tab to rotate and resize the image.)
2. To add a note, click either of the down arrows on the Notes header to view the full list of options available. Select the note you wish to use by clicking on it.



3. Click and drag on the area in the document where you wish to place the any of the notes.



- Click on either the **View Notes List** icon on the ribbon or the **Notes** icon to view or add details to the notes.

**Each note contains the user name of who created the note as well as the date and time.*

The screenshot shows the OnBase software interface. The top ribbon has tabs for 'Document' and 'Image'. Under 'Document', there are sections for 'Information' (Keywords, Cross-References, Revisions, History, Properties) and 'Actions' (Send To, Check Out, Delete, Re-Index). Under 'Image', there are 'View Notes List', 'Overlap Text', and 'Redaction' icons. A red arrow points from a text box to the 'View Notes List' icon. Below the ribbon, the document 'ADM Applications - 11/1/2010' is displayed, showing a form with a 'FALL SUMMER' stamp and a circled note: 'MUST BE POSTMARKED BY: Session 2 = May 30, 2003 OR Brought to the Admissions and Records Office by: Session 1 = May 30, 2003 Session 2 = July 11, 2003'. To the right, a 'Notes' panel shows a list of notes. A red arrow points from a text box to the first note: 'Note - 4/25/2016 EOJEDA 4/25/2016 12:04:54 PM 4/25/2016, 12:04:54 PM Evelyn Ojeda - This looks like an incomplete application.'

Click on either to see note details.

Click on the note to enter text.

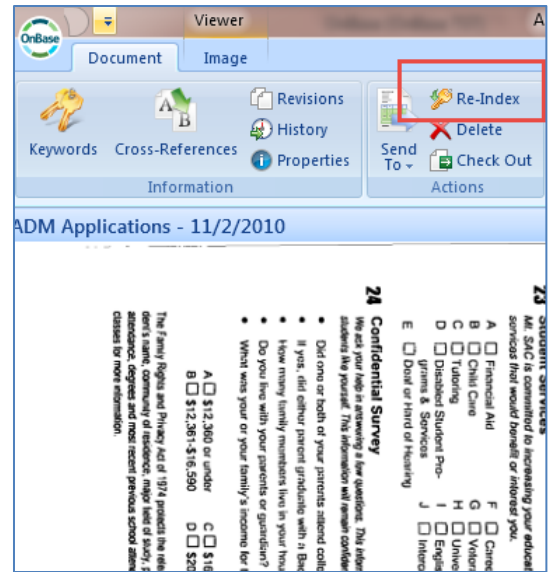
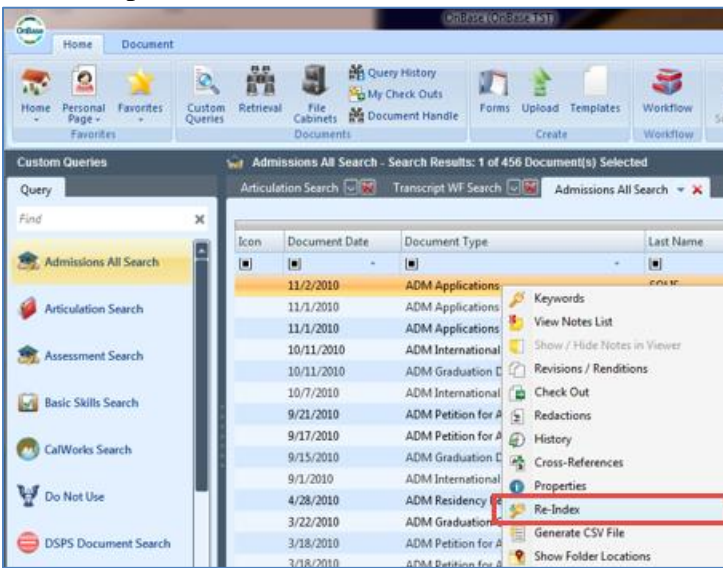
- To **Delete** a note or to set **Privacy Options**, **right-click** on the note **or** use the ribbon options.

This screenshot shows the OnBase software interface, focusing on the ribbon options for notes. The 'Notes' section of the ribbon includes 'View Notes List', 'Overlap Text', and 'Redaction'. A red arrow points to the 'Delete Note' and 'Privacy Options' icons, which are highlighted with a red box.

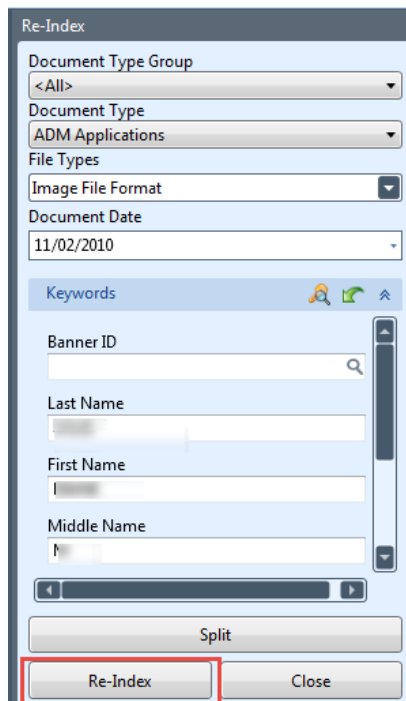
Re-Indexing

When a document is indexed incorrectly (wrong group, type, name, etc.) it can be corrected by updating the keywords or document group and type. (See page 12 for more information on indexing.)

1. Search for the documents (if not opened already).
2. Right-click on the document in the search results **OR** click Re-Index in the ribbon if the document is open.



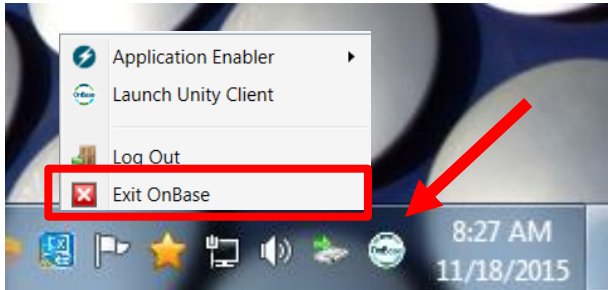
3. Make changes to keywords or fields in the re-index area as necessary and click **Re-Index** when done.



Exiting OnBase

OnBase will run in the background after you login. Below is how to exit OnBase completely.

1. **Right click** on the Unity Client icon on the task bar and click **Exit OnBase**. (Lower right-hand corner of screen).



2. Click **Yes** to confirm exit.

