

## INFORMATION TECHNOLOGY Enterprise Application Systems

# HylandOnBase UserGuide

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# **Table of Contents**

Accessing OnBase	2
OnBase Home Page	
Document Retrieval by Custom Query	4
Document Retrieval by Document Type	8
Document Upload	10
Scanning and Indexing	11
Scanning and Document Separation	13
Deleting and Re-Ordering Pages	
Highlights, Annotations, and Notes	
Re-Indexing	20
Exiting OnBase	



#### **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.)

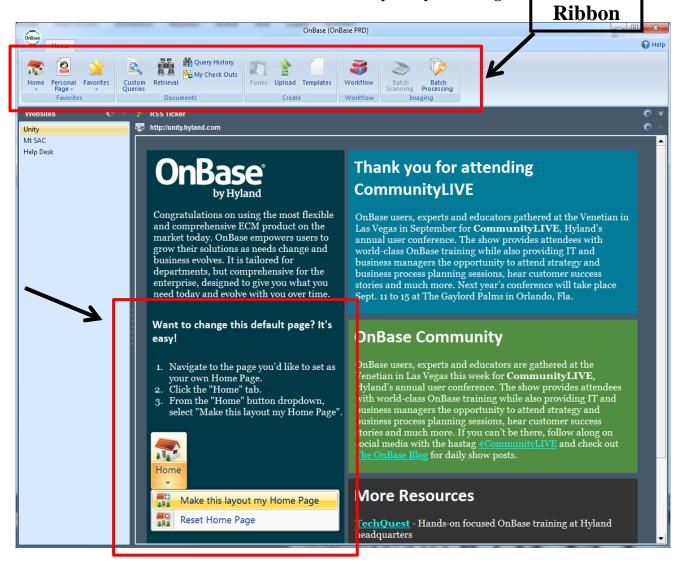
<b>OnBase</b> <sup>*</sup> 14	×
Copyright © 1992 - 2015 Hyland Software, Inc. All Rights Reserved. Build Version 14.0.1.97	ÖnBase PRD         Image: Second sec
	Login Cancel

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

#### HYLAND ONBASE OnBase Home Page

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

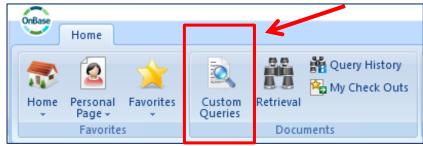
*Example: You can set your Home Page to the Retrieval screen by clicking on the Retrieval button on the ribbon, then click the Home button and select Make this layout my Home Page.* 



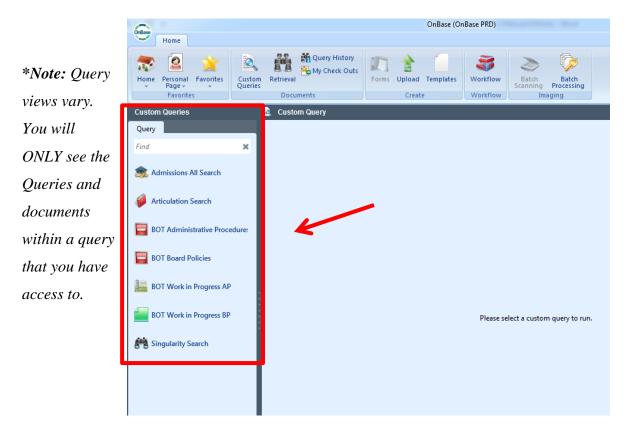
## **Document Retrieval by Custom Query**

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.



#### HYLAND ONBASE

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.

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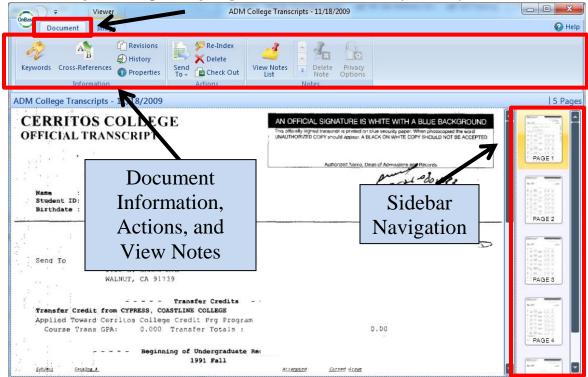
You can click on any of the **Column Titles** in the results list to **rearrange** documents in ascending or descending order.

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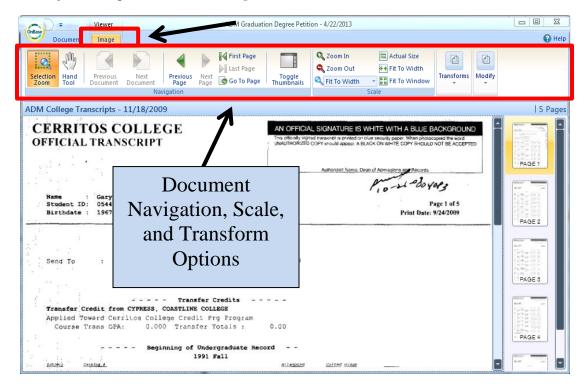
#### HYLAND ONBASE

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.



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

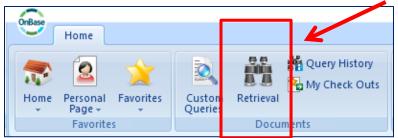
Note: The **Query History** option in the home ribbon allows you to view query history for your current login session.

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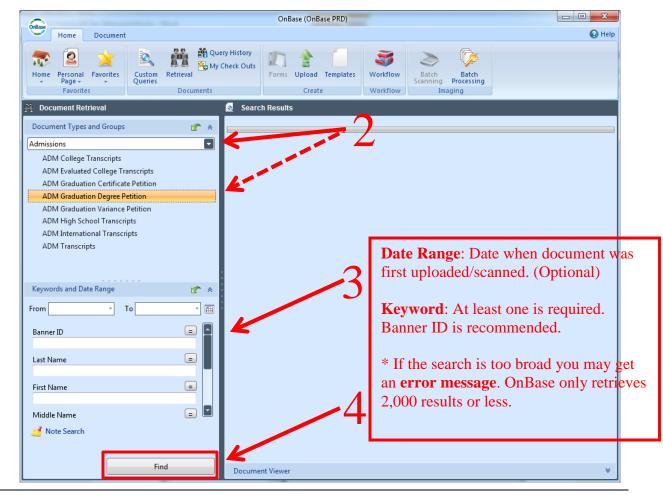
# Document Retrieval by Document Type

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

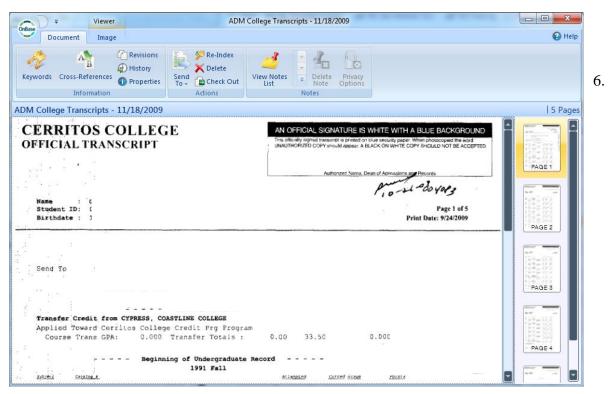
1. Click on the **Retrieval** icon in the ribbon.



- 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.)



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.

👭 Document Retrieval	
Document Types and Groups	
Admissions	
ADM College Transcripts	
ADM Evaluated College Transcripts	
ADM Graduation Certificate Petition	
ADM Graduation Degree Petition	
ADM Graduation Variance Petition	
ADM High School Transcripts	
Keywords and Date Range	

Note: The Query History option on the home ribbon allows you to view query history for your

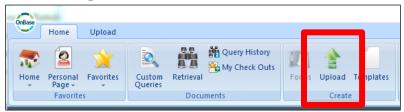
current login session.

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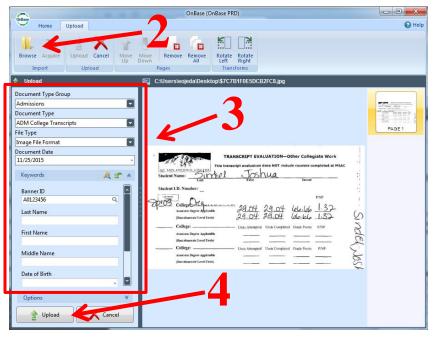
#### HYLAND ONBASE Document Upload

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.



- 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. <u>Keywords:</u>
  - \*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.



#### HYLAND ONBASE 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.



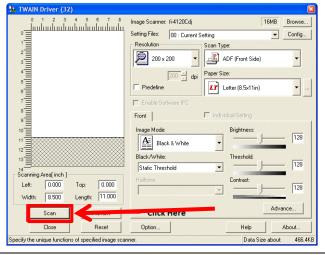
2. Click the Acquire icon in the upload screen.



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



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**.

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#### Indexing

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

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- **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.

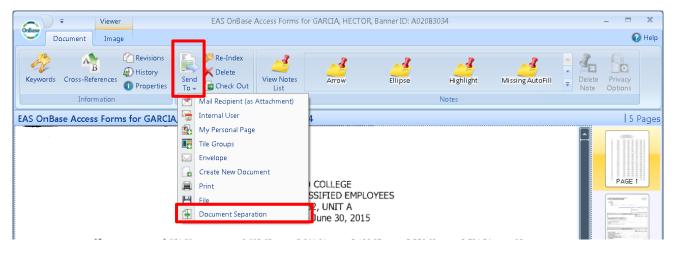
# Scanning and Document Separation

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 (1<sup>st</sup> 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.

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Drop page(s) in a blank area of the Separation Workspace to creat		
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PAGE 1 PAGE 2 PAGE 3 PAGE 4	PAGE 5	-

#### HYLAND ONBASE

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

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documents.	
PAGE I PAGE 2 PAGE 3 PAGE 4 PAGE 5	

You should now see something similar to this window.

Document Separation	
Document Separation	
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Drop page(s) in a blank area of the Separation Workspace to create a new document	
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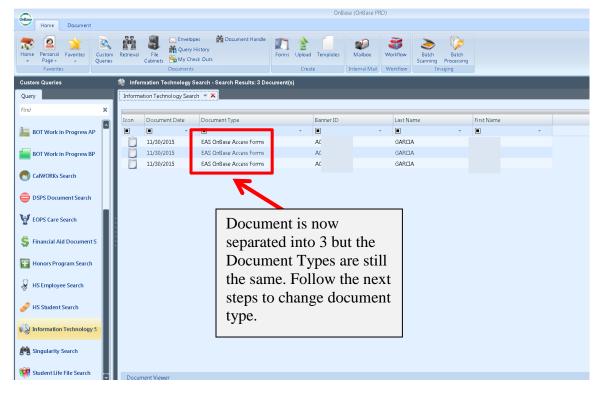
5. Click and drag the pages to the appropriate row to match by document type.

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PAGE 4		

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

Now that the pages are separated accordingly, you will now need to retrieve the documents to reindex 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).



- 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.

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93	4,408.23	4,628.65	4,860.08	5,103.09	5,358.24	5,626.15	93				٩
94	4,452.32	4,674.95	4,908.68	5,154.11	5,411.81	5,682.41	94			Last Name GARCIA	
95	4,496.84	4,721.69	4,957.76	5,205.66	5,465.94	5,739.25	95	-		First Name	
96	4,541.81	4,768.90	5,007,35	5,257.71	5,520.60	5,796.63	96			HECTOR	
97	4,587.24	4,816.59	5,057.42	5,310.31	5,575.83	5,854.61	97			Middle Name	
98	4,633.10	4,864.76	5,108.00	5,363.39	5,631.58	5,913.15	98			М	
99	4,679.43	4,913.40	5,159.07	6,517.01	5,687.89	5,972.26	99				
100	4,726.22	4,962.52	5,210.67	5,471.20	5,744.75	6,031.98	100				
101	4,773.47	5,012.16	5,262.76	5,525.90	5,802.20	6,092.31	101				
102	4,821.22	5,062.28	5,315.40	5,581.17	5,860.23	6,153.23	102				
103	4,869.43	5,112.91	5,368.55	5,636.98	5,918.82	6,214.77	103				
104	4,918.12	5,164.02	5,422.23	5,693.34	5,978.01	6,276.92	104				
105	4,967.30	5,215.67	5,476.45	5,750.27	6,037.80	6,339.69	105				
106	5,016.97	5,267.84	5,531.21	5,807.77	6,098.17	6,403.08	106				
107	5,067.14	5,320.50	5,586.54	5,865.86	6,159.15	6,467.11	107			-	
108	5,117.81	5,373.71	5,642.40	5,924.52	6,220.73	6,531.78	108			Split	t
109	5,169.00	5,427.45	5,698.83	5,983.77	6,282.95	6,597.10	109			Be-Index	⊈lose
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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.

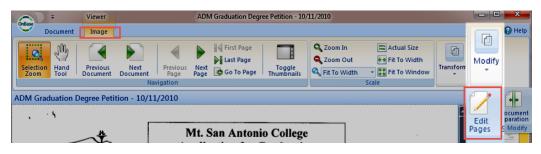
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#### Fall 2015

#### HYLAND ONBASE 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.

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Ordine	Documen	t Page Edit	or								😡 Help
Save	Cancel Edit	92 22 Undo Redo	Browse Acqui		Coom In Coom Out Fit To Width	Fit To V + Fit To V Stale	Width	otate Rotate	Rotate 180*	S Flip Horizontally	
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## **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.

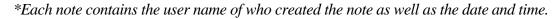
- 1. To begin open the document and click on **Document** tab. (You can use the Image tab to rotate and resize the image.)
- 2. To add a note, click either of the down arrows on the Notes header to view the full list of options available. Select the note you wish to use by clicking on it.

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

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



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

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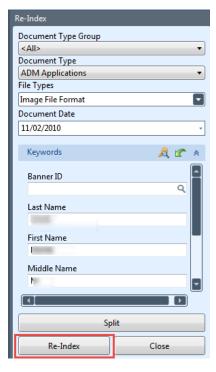
## **Re-Indexing**

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.

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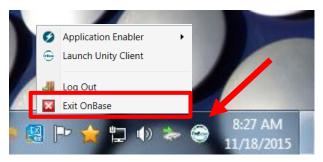
3. Make changes to keywords or fields in the re-index area as necessary and click **Re-Index** when done.



#### HYLAND ONBASE 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.

