

OnBase - Getting documents into OnBase

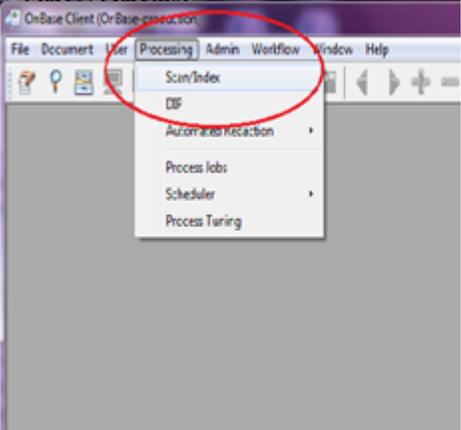
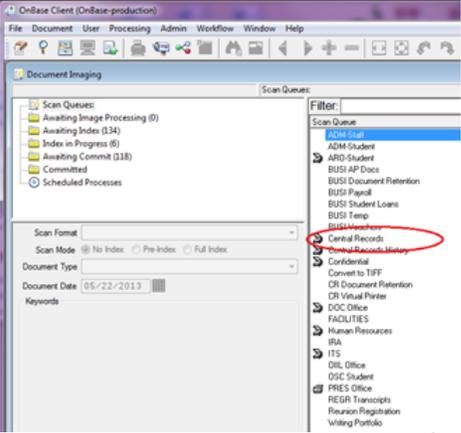
Overview

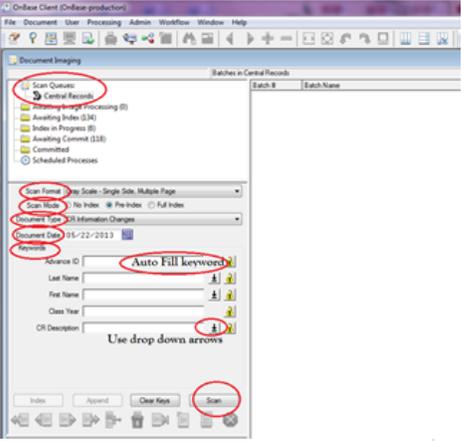
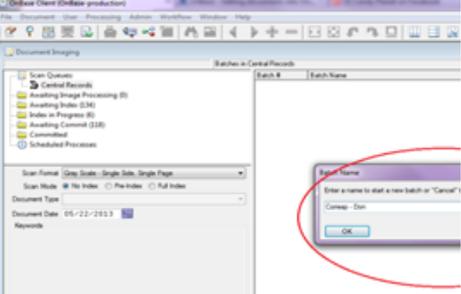
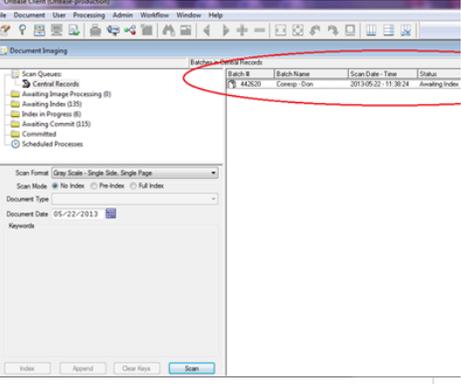
There are a number of ways to get files into OnBase. This document will describe how to import files one-at-a-time. Keep in mind, though, that there are also various ways to import documents in batches.

Scanning

If your document is already in paper form, you can scan it into OnBase. To do this scanning you can use either an MFP or a desktop scanner.

Make sure the scanner is turned on.

1	Open OnBase	
2	In the Processing menu, select Scan/Index	
3	Find your scan queue and double click on it to activate	
4	Select a Scan Format	
5	Select a Scan Mode	
6	Select the Document Type	
7	Enter the date	

8	<p>If you select pre-index or full index, enter the keywords for that document.</p> <p>If there is an auto-fill attached to this document, you can also enter the ID number followed by the tab key.</p> <p>Also, using Drop down arrows and entering the first letters of the keywords with the drop-down arrow will help with indexing and eliminating typos.</p>	
9	When the keywords are filled in click on Scan	
10	Enter a Batch Name (Description of documents)	
11	Click OK	
12	Load scanner	
13	When the papers are scanned you will get virtual rescan message. Press cancel	
14	Select the correct action in the Scanning Complete Box (Done if batch is complete)	
15	The Batch will show up on the right hand side of your window after scan is complete	

Appending pages to an existing document:

1. Go to that document
2. Right-click and choose to scan more pages
3. Scan queue, format dialog box Press Ok

4. Double click your Scan Queue
5. Your document will come up in the scan view
6. Load the scanner with the pages you want to scan and press SCAN
7. Scan more pages Dialog box will come up choose where you want the new pages to go. Press OK
8. Press CANCEL when all pages have gone through scanner
9. Choose DONE if you are through scanning
10. Open up the document again to make sure the pages that you were adding are there and ended up in the right place.

Virtual Printing

If you have a document open and you want to put it into OnBase, you can use the Print button to import into OnBase. For example, perhaps you received an email that needs to be in OnBase. Rather than printing and scanning it, and rather than saving it to a file and importing it, you can send it right into OnBase with the *File -> Print* features of your software application. This is known as *Virtual Printing*. Follow [these instructions](#) to get your document virtually printed into OnBase.

If the document you have open happens to be part of a document that's already in OnBase, you can *append* your pages to this existing document with these steps:

1. From the document where the new pages exist, choose Print and choose the Hyland printer.
2. In the dialog box, choose your document type group, your document type, your keywords, etc.
3. Click the box that reads 'Append pages to existing document'
4. Import the document

Importing

If your files exist on a drive (your computer, collab, etc) you can import it directly into OnBase by doing the following:

1. Open OnBase
2. Click on File
3. Click on Import
4. In the File Path area, click on Browse and find your file
5. Choose the document type group that is appropriate
6. Choose the appropriate document type
7. The keywords need to be entered - never skip this step or your document will be lost forever! Many documents have an 'auto-fill keyword set' that allows you to enter an ID number and hit the Tab key, and some of the remaining fields will be filled in for you. Many documents also have a 'reverse lookup' where you can hit the Lookup button and
8. When the keywords are filled in click on Import

Another way to directly import an electronic file is the drag-drop method. If the file is on your desktop or you can see it in Windows Explorer, you can simply drag the file to the grey space in OnBase Client. You'll see the indexing window and you can proceed as outlined above.