

Uploading Documents to OnBase

Purpose: This job aid details the process of scanning or uploading documents into OnBase. Use the table below to jump to the step-by-step process guide for a specific method of upload.

Process Guides

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Go to [Step 2: Indexing Documents in OnBase Job Aid](#)

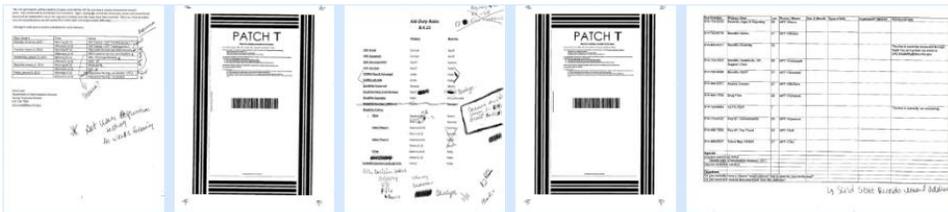
SCANNING DOCUMENTS INTO THE DMS VIA AN MPF SCANNER

1. Ensure your Multifunction Printer (MFP) has been setup to scan to the DMS.

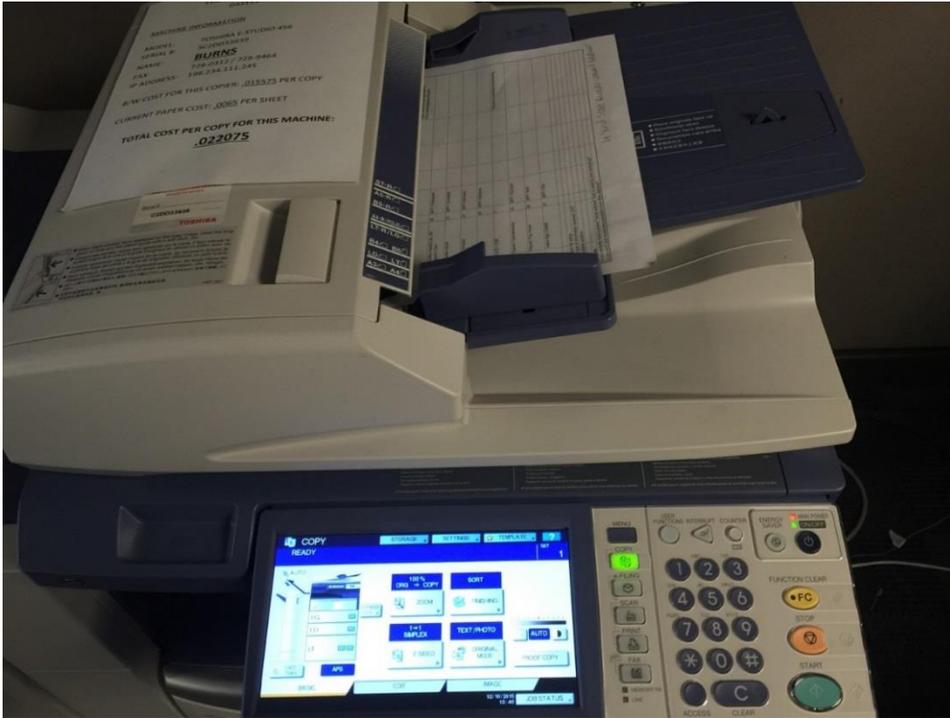
Note: Some Agencies MFPs' are defaulted to scan documents in with a PDF format, however they all have the ability to change this setting to a TIFF format. When scanning in batches of documents into OnBase, it is recommended that the documents be separated with a Patch sheet and scanned into OnBase in the black and white TIFF format. When following this process, the separator sheets will automatically be removed and the documents will be ingested into OnBase as separate documents where they can be indexed and retrieved.



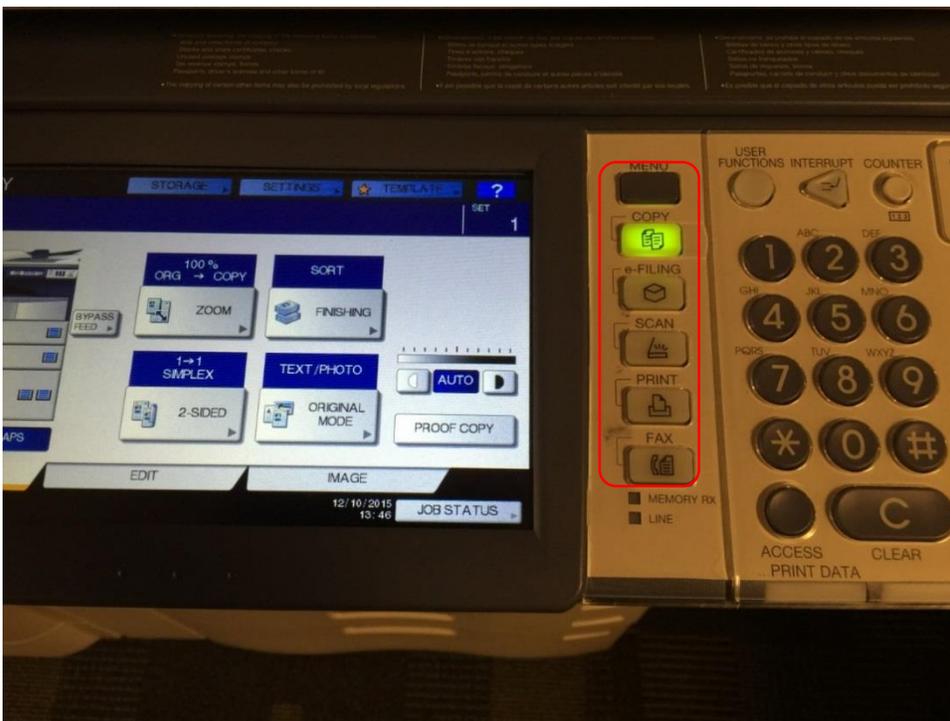
2. To separate documents in a batch, place a Patch T patch code sheet at the start of each new document.



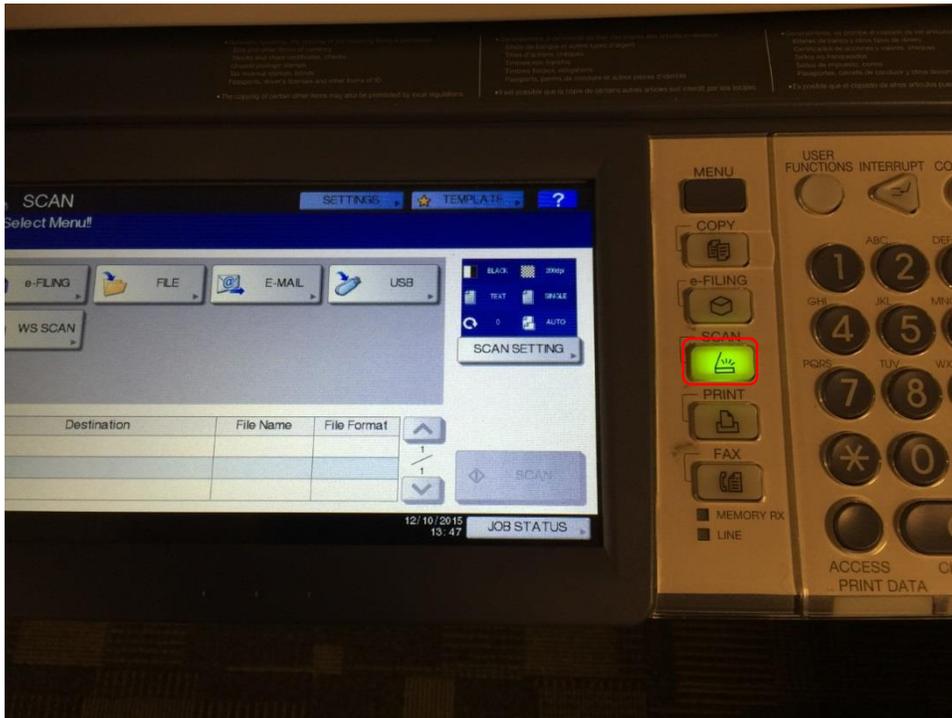
- Place document(s) on scan tray



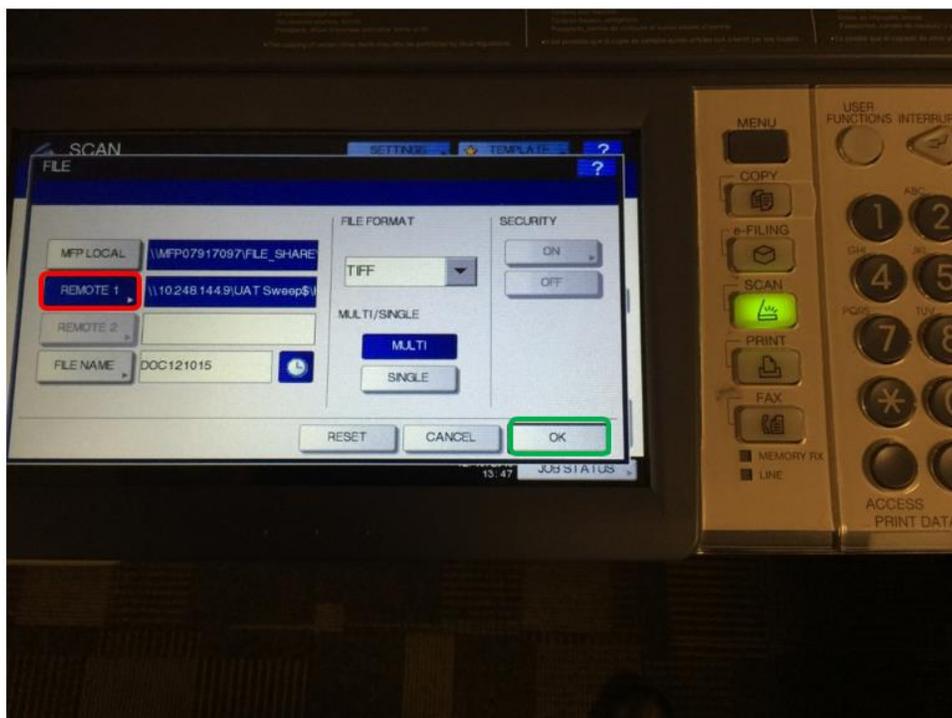
- Find the **MENU** section on the MFP



5. Select the **SCAN** option and select FILE



6. The FILE Menu will appear on the screen.
 - a. Select the Remote location setup for the DMS (**Remote 1 in example**)
 - i. If Remote 1 is not an option contact your IT support
 - b. Select **OK**



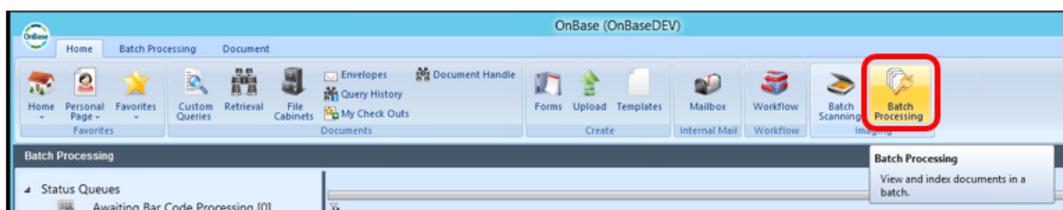
7. Select the **SCAN** button



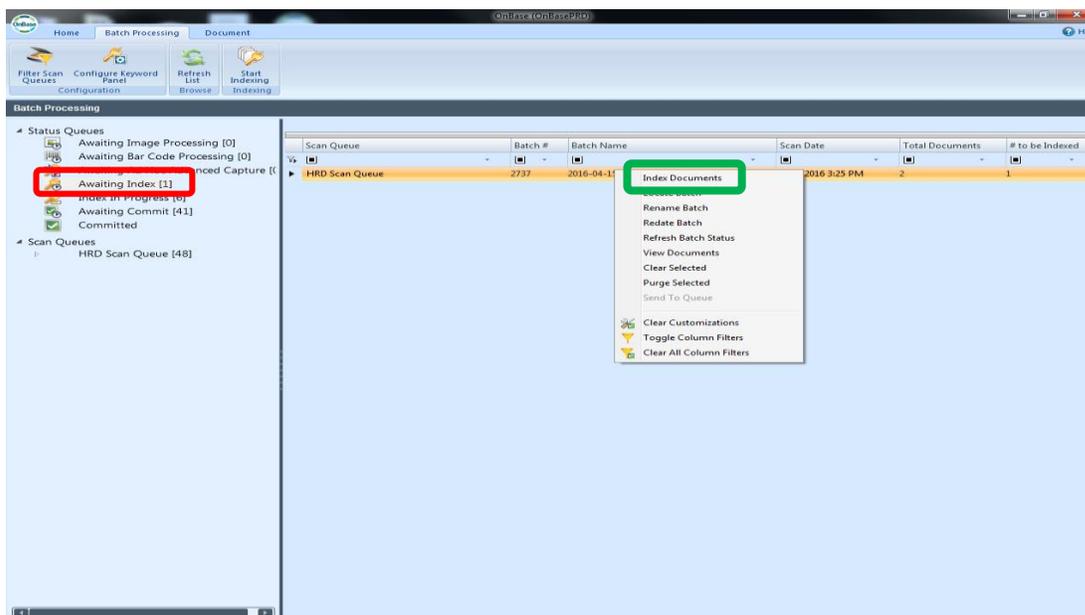
8. Your documents will be available in OnBase within 5 minutes after scanning.

9. To begin indexing, sign into OnBase.

10. Select **Batch Processing** from the Home Ribbon.



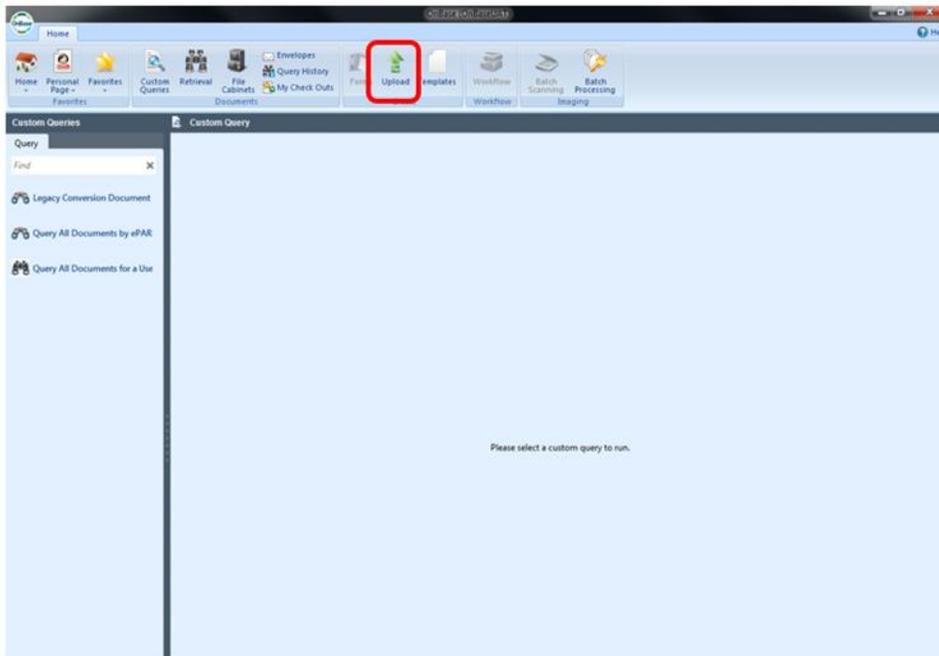
11. Documents that have been scanned into DMS's will reside in the **Awaiting Index** queue in batches. To index the batch, **right click** on a batch and select **Index Documents**.



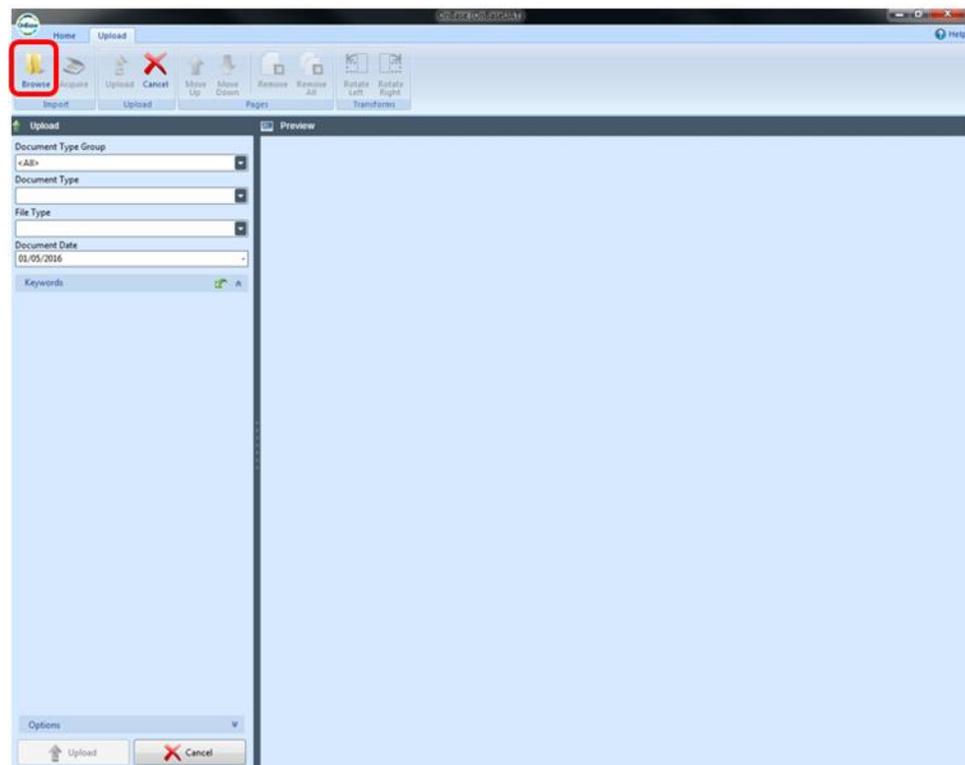
UPLOAD DOCUMENTS FROM COMPUTER

Note: The only file format that has the functionality to rotate, remove or move documents is a TIF file. You can merge multiple TIF files to become 1 document.

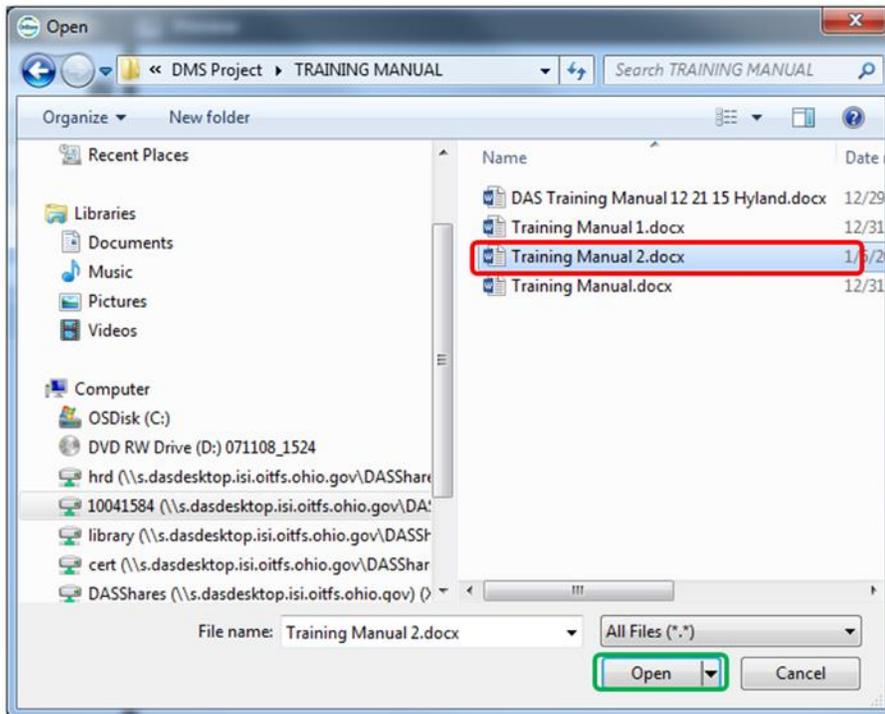
1. Open the OnBase Unity Client on your Desktop and select **Upload**



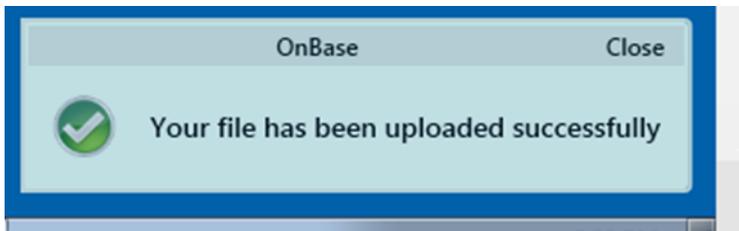
2. Select **Browse**



3. Select **document** and click **Open**

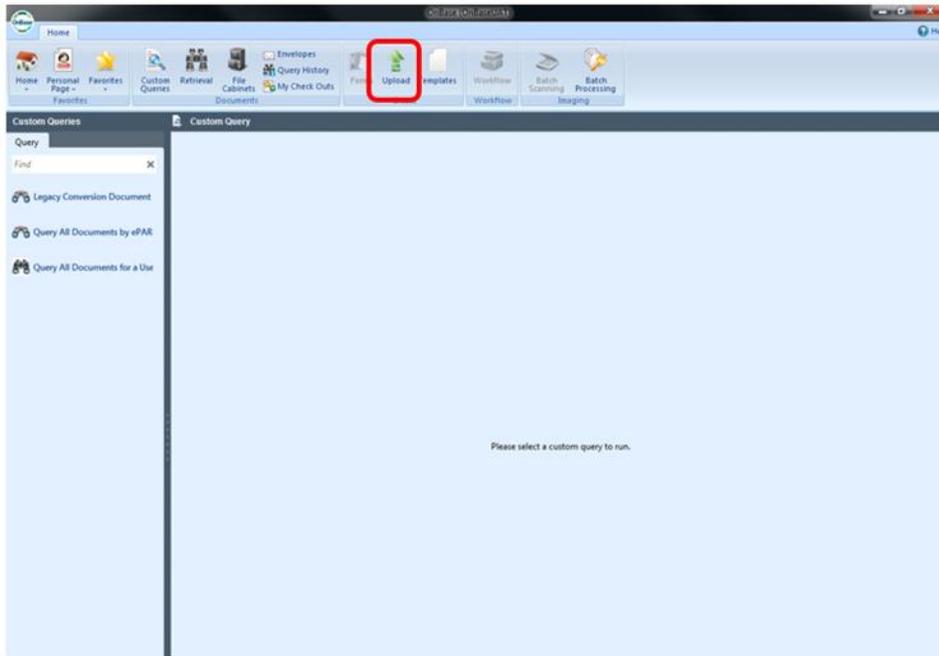


4. Index the document & select **Upload**. You will receive Document Upload Complete message.



DRAG & DROP FROM COMPUTER

1. Minimize the Unity Client so both OnBase and the document to be uploaded are visible (e.g., on the desktop, in a folder, in an email, on another monitor)
2. Select **Upload**



3. Left Click and hold the document in your desktop/folder (Fig. A) or email attachment (Fig. B) and drag it to the preview section in OnBase

Fig. A

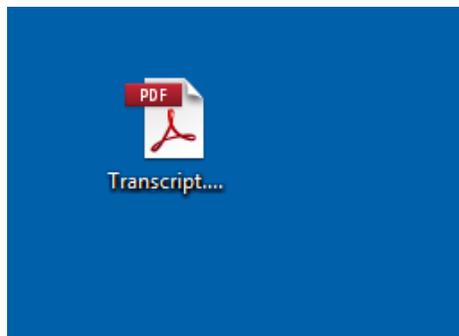
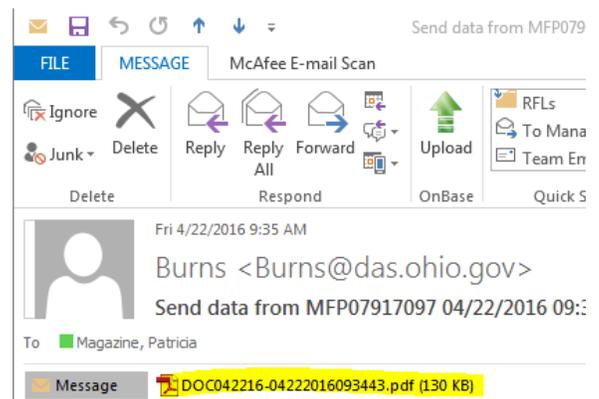


Fig. B



4. Release the Left Click when cursor is in the **Preview** section

5. Index the document & Select **Upload** You will receive Document Upload Complete message.

The screenshot shows the OnBase (OnBasePRD) application window. The top menu bar includes Home, Upload, and Help. Below the menu bar is a toolbar with icons for Home, Personal Page, Favorites, Custom Queries, Retrieval, File Cabinets, Envelopes, Query History, My Check Outs, Forms, Upload, Templates, Workflow, Batch Scanning, and Batch Processing. The main window is titled 'Upload' and shows the file path 'C:\Users\10060713\Desktop\Transcript.pdf'. On the left side, there is a metadata form with fields for Document Type Group (HR - Administrative), Document Type (Training, Education Documents), File Type (PDF), Document Date (04/22/2016), Keywords (SOUID (EmployeeID)), First Name, Middle Initial, Last Name, SSN, Agency, and Options. At the bottom of this form, there are 'Upload' and 'Cancel' buttons. The 'Upload' button is highlighted with a red box. The main preview area displays a document titled 'CENTRAL MICHIGAN UNIVERSITY OFFICE OF THE REGISTRAR OFFICIAL TRANSCRIPT'. The document includes the name 'PATRICIA S MAGAZINE' and a table of credits.

Page: 1 of 2
Date: 03/23/2015

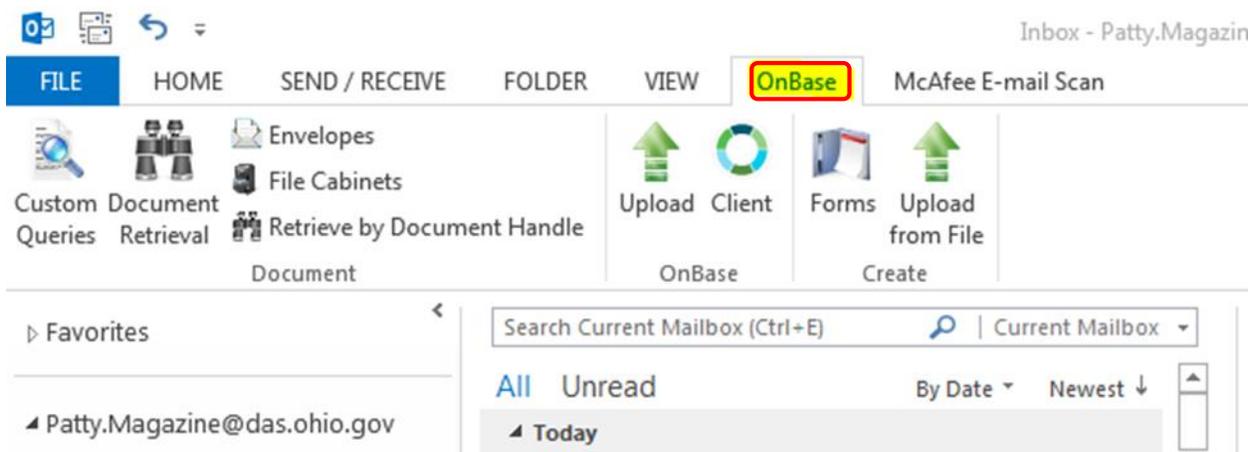
Transcript Prepared For: PATRICIA S MAGAZINE
Academic Record of: PATRICIA S MAGAZINE
Student Number: 4044
Student Level: Graduate
Term Admitted: Spring 2008-2009
Birth Month/Day: XXX-XX
SSN: XXX-XX
Michigan UIC: 643137

CENTRAL MICHIGAN UNIVERSITY CREDITS:					Notes
Course	Title	Credits	Grade	Repeat	
Spring 2008-2009					
CEJ 655	Human Relations Skills	3.00	A		
MSA 650	Org Thry: Strat & Struct	3.00	A		
Sem Hrs Earned: 6.00		GPA Hrs: 6.00	Points: 24.00	GPA: 4.00	
Cum Tot Earned: 6.00		GPA Hrs: 6.00	Points: 24.00	GPA: 4.00	
Fall 2009-2010					
ECO 515	Col Bargaining Labor Law	3.00	A		
Sem Hrs Earned: 3.00		GPA Hrs: 3.00	Points: 12.00	GPA: 4.00	
Cum Tot Earned: 9.00		GPA Hrs: 9.00	Points: 36.00	GPA: 4.00	
Spring 2009-2010					
MGT 649	Sem in Org Development	3.00	A		
MSA 634	Managerial Accounting Concepts	3.00	A-		
Sem Hrs Earned: 6.00		GPA Hrs: 6.00	Points: 23.10	GPA: 3.85	
Cum Tot Earned: 15.00		GPA Hrs: 15.00	Points: 59.10	GPA: 3.94	
Spring 2010-2011					

UPLOADING DOCUMENTS WITH OUTLOOK INTEGRATION

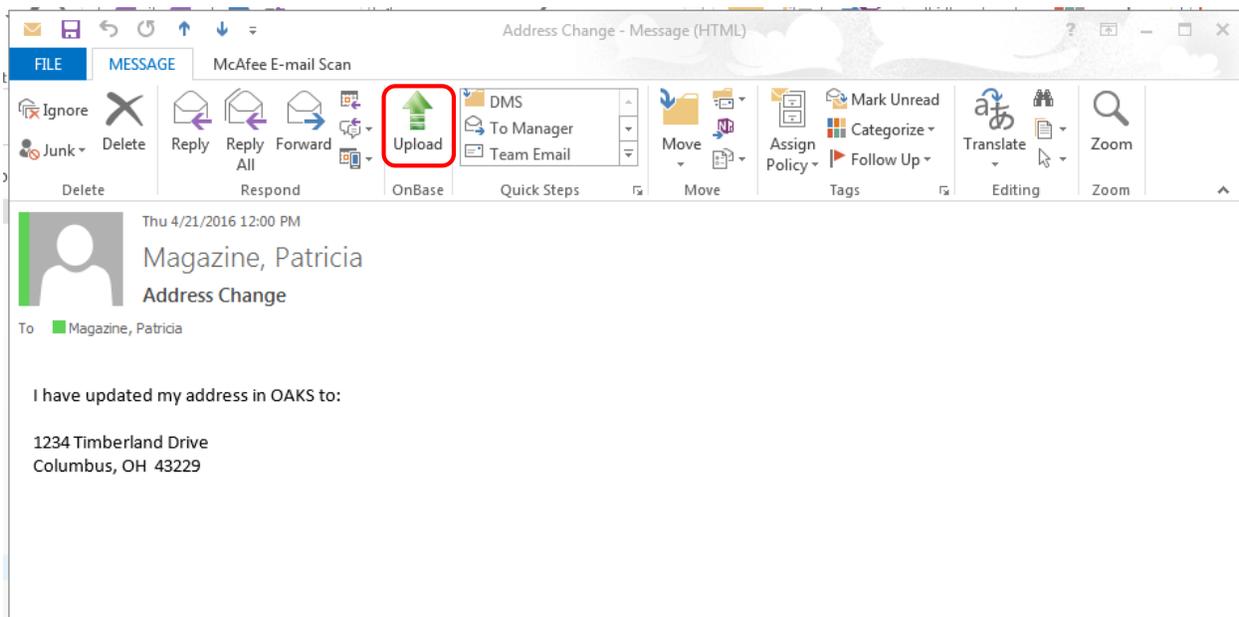
NOTE: This function is not available in Outlook web client. You do not have functionality to rotate, remove or move documents from Outlook Integration.

1. Ensure the OnBase Outlook Integration feature is enabled on your PC.
2. Click on the **OnBase** tab in Outlook header.



Upload email only:

1. Open email & select **Upload**

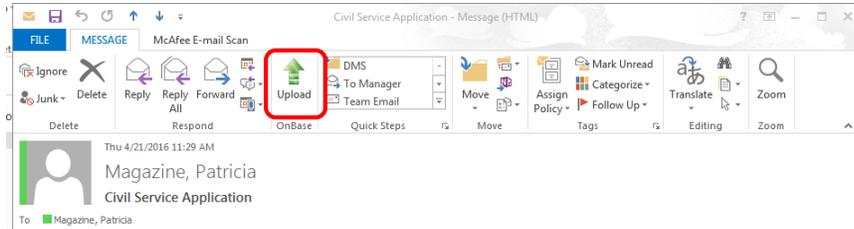


2. Index the document & Select **Upload** You will receive a confirmation that the document has been uploaded successfully.

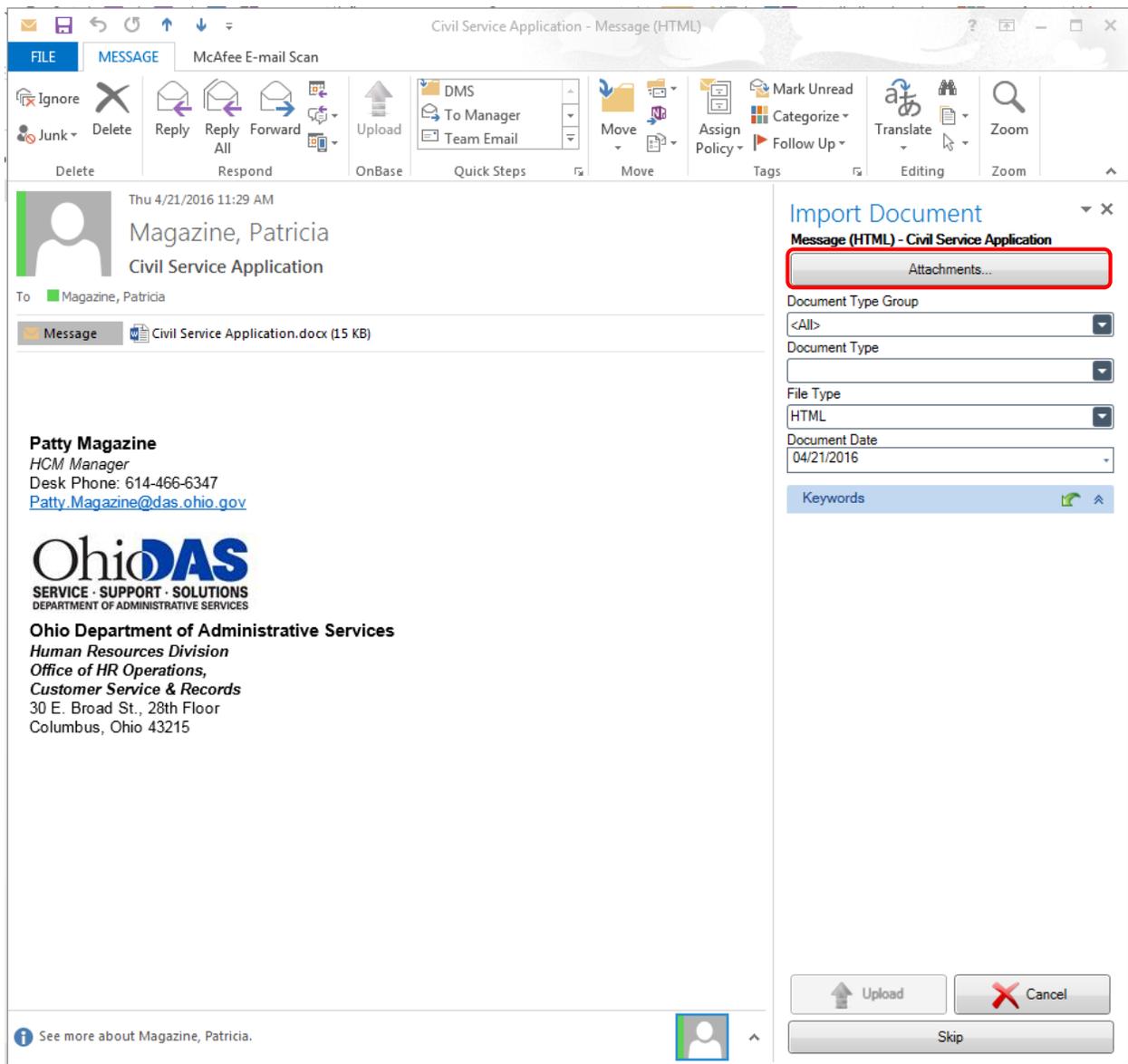
The screenshot shows an Outlook window titled "Address Change - Message (HTML)". The ribbon includes "FILE" and "MESSAGE" tabs. The "MESSAGE" tab is active, showing a "McAfee E-mail Scan" notification. The ribbon contains various actions: Ignore, Delete, Reply, Reply All, Forward, Upload, DMS (To Manager, Team Email), Move, Assign Policy, Mark Unread, Categorize, Follow Up, Translate, and Zoom. The email content is from Patricia Magazine, dated Thu 4/21/2016 12:00 PM, with the subject "Address Change". The body text reads: "I have updated my address in OAKS to: 1234 Timberland Drive, Columbus, OH 43229". On the right, the "Import Document" dialog box is open, showing the message details: "Message (HTML) - Address Change", "Document Type Group: HR - Payroll and Benefits", "Document Type: Change of Address Cards", "File Type: HTML", and "Document Date: 04/21/2016". Below this, there are fields for "Keywords", "SQUID (EmployeeID)", "First Name", "Middle Initial", "Last Name", "SSN", "Agency", "Agency_2", "Agency_3", and "Location". At the bottom of the dialog, the "Upload" button is highlighted with a red box, along with "Cancel" and "Skip" buttons.

Upload email attachment(s) only:

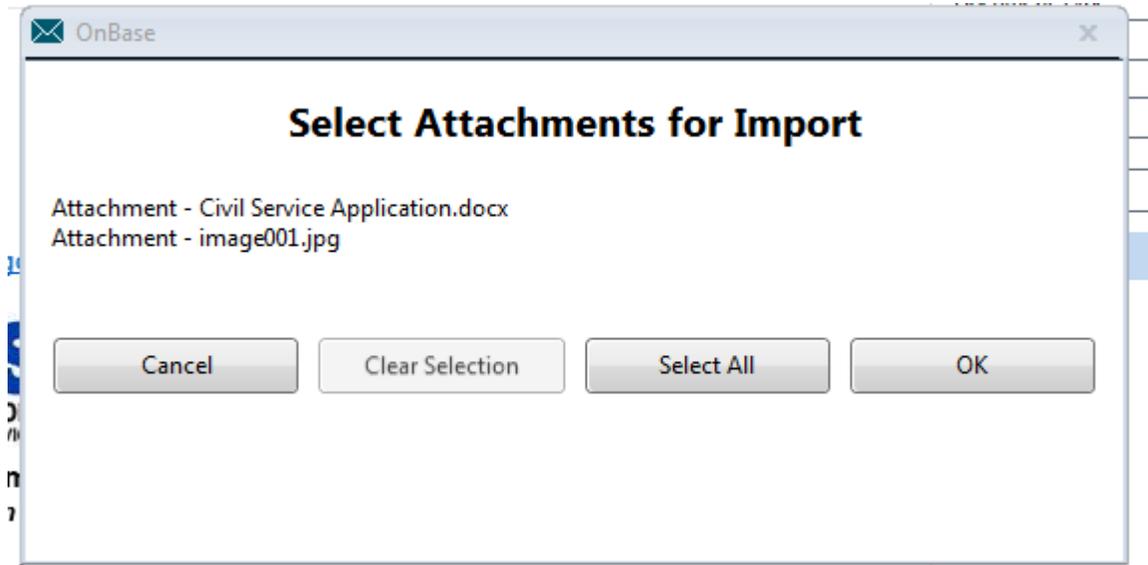
1. Open email & select **Upload**



2. Select **Attachments** under Import Document

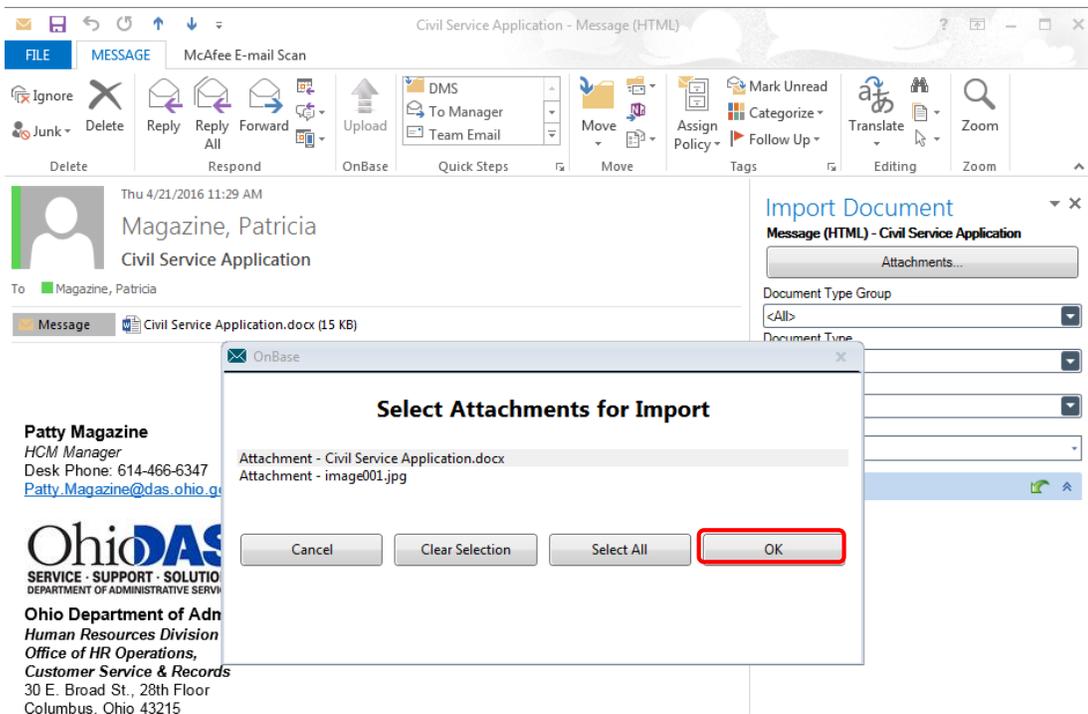


3. The Select Attachments for Import will pop up



4. Highlight the attachment(s) to be imported & Select **OK**

1. Images that come through as attachments (e.g., signature, logos, etc) do not need to be highlighted to upload



5. Index the document & Select **Upload**. You will receive a confirmation that the document has been uploaded successfully.

The screenshot shows an Outlook window titled "Civil Service Application - Message (HTML)". The email is from Patricia Magazine, dated Thu 4/21/2016 11:29 AM, and contains an attachment named "Civil Service Application.docx (15 KB)". The email body includes contact information for Patty Magazine, HCM Manager, and the Ohio Department of Administrative Services logo and address. An "Import Document" dialog box is open on the right side of the window. The dialog box has a title bar "Import Document" and a subtitle "Message (HTML) - Civil Service Application". It contains a "Attachments..." button, several dropdown menus for "Document Type Group" (HR - Administrative), "Document Type" (Civil Service Application), and "File Type" (HTML). The "Document Date" is set to 04/21/2016. There is a "Keywords" section with a search icon. Below that are several text input fields for "SQUID (EmployeeID)", "First Name", "Middle Initial", "Last Name", and "SSN". There are also dropdown menus for "Agency", "Agency_2", and "Agency_3". At the bottom of the dialog box, there are three buttons: "Upload" (with a green arrow icon), "Cancel" (with a red X icon), and "Skip". The "Upload" button is highlighted with a red rectangular box.

Upload email & multiple attachments:

NOTE: Multiple attachments that are PDF, Word & Excel Documents cannot be saved as 1 document. They will be saved as separate documents with the same doc type name. Multiple TIF files can be saved into 1 document using the Drop & Drag functionality, see [Uploading Electronic Documents Job Aid for Instruction](#).

1. Open email & select **Upload**
2. Select **Attachments** under Import Document
3. The Select Attachments for Import will pop up
4. Choose **Select All** & click **OK**
5. Index the document & Select **Upload**
6. Document Upload Complete
7. Check **Apply to all attachments** (lower right corner)

The screenshot displays an Outlook window titled "Pre-Hire Packet - Message (HTML)". The email is from Geoffrey Phillips to Patricia Magazine, dated Thu 4/21/2016 3:25 PM. The subject is "Pre-Hire Packet". The email body contains the following text:

Please find attached my remaining pre-hire documents from our meeting the other day.

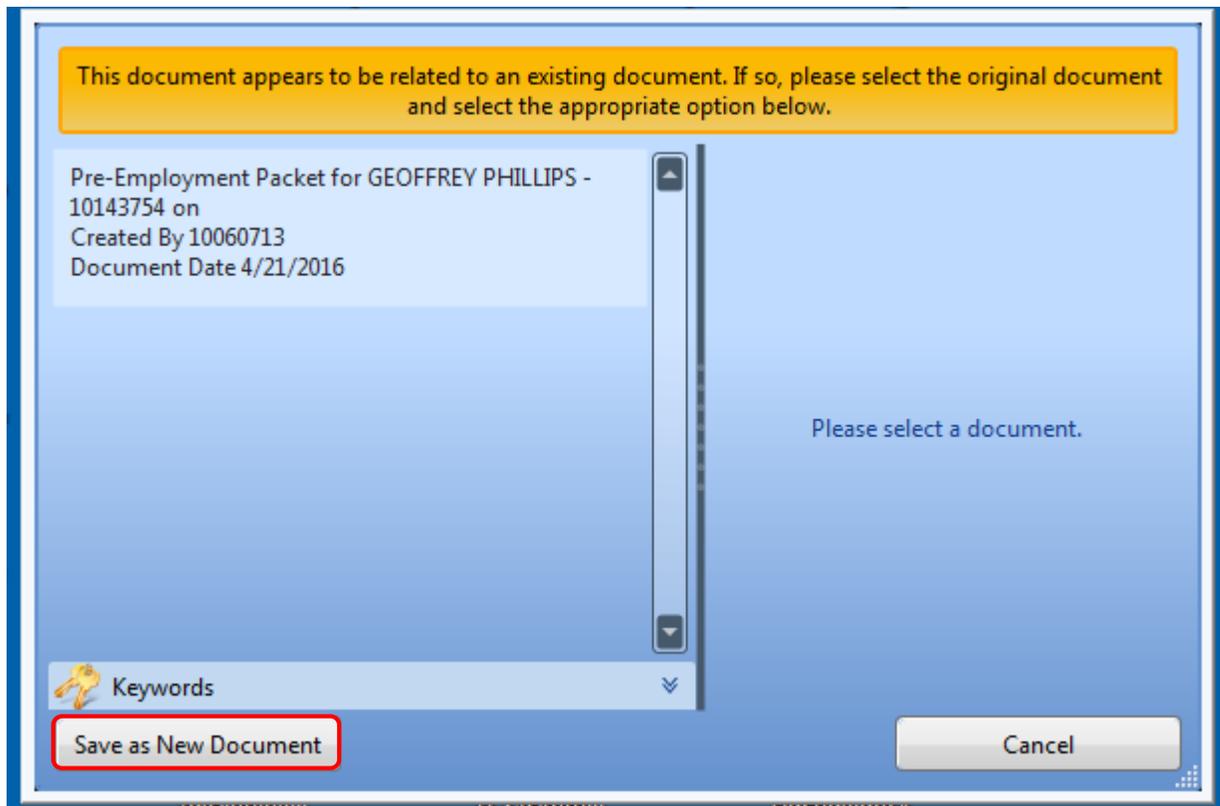
I can start work on 6/6/16. Please send me the offer letter so I can put my 2 week notice in at my current employer.

The "Import Document" dialog box is open, showing the following fields:

- Attachment - Civil Service Application.pdf
- Document Type Group: HR - Administrative
- Document Type: Pre-Employment Packet
- File Type: PDF
- Document Date: 04/21/2016
- Keywords: 30
- Agency_3: 1000
- Location: JRST28
- SSN: [Empty]
- ePAR Number: 0
- Category: [Empty]
- Action: [Empty]
- Reason: [Empty]
- Effective Date: [Empty]

At the bottom of the dialog, there are "Upload" and "Cancel" buttons. Below these buttons, the "Apply to all attachments" checkbox is checked and highlighted with a red box.

8. Click **Save as New Document**
 - a. Repeat same process for each attachment
 - b. If the document is opened after upload, be sure to close it.



9. You will receive a notification confirming that your document was uploaded successfully.