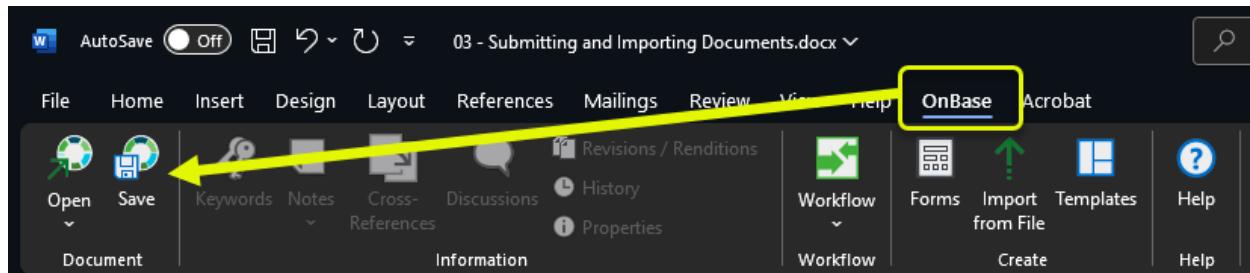


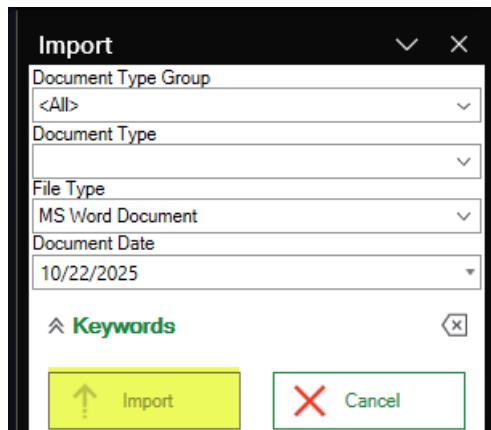
Submitting/Importing Documents

How to Create a New Document

- 1. Open the OnBase Tab:** In Microsoft Word, Excel, or PowerPoint you will see a new OnBase tab. Create your document, open the OnBase tab, and then click the Save button. If you are not logged in, the system will prompt you to do so.



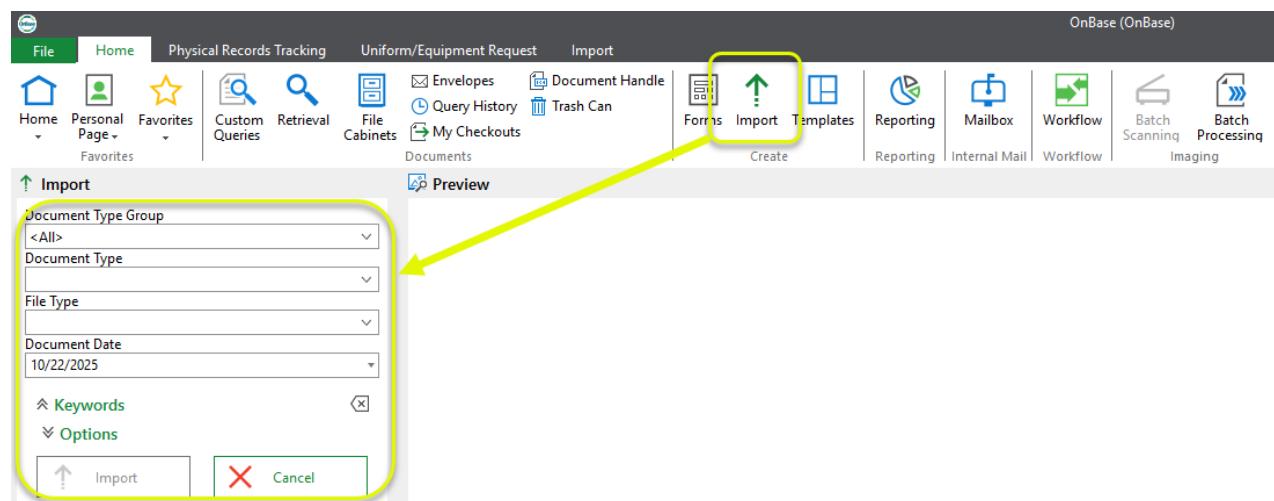
- 2. Select Document Type:** On the right-hand side, choose the appropriate Document Type. This groups similar documents and controls access. If you have access to multiple types, use the Document Type Group dropdown to narrow the list. The file type is detected automatically.
- 3. Set Document Date:** The date defaults to today but can be changed (ie. for documents relating to past dates). Correct dates are important for date-range searches.
- 4. Enter Keywords:** Keywords vary by document type and improve searchability. Required keywords appear in red. Your username will auto-fill the Author keyword. At minimum, fill out Description. Other examples include: Year, Name (Project, Event, Vendor, Owner), Number (Project, Bid, Grant), Location (Address, Parcel, Street), Recipient, etc.
- 5. Save the Document:** Click Import at the bottom. A confirmation message will appear in the bottom-right corner when the document is saved successfully.



How to Import Documents into OnBase

1. **Start the Import:** Click Import on the Home tab, then click Browse to locate and double-click the file you want to import.
2. **Set Document Details:** The upload screen is the same as when creating a new document. Select the Document Type, adjust the Document Date if needed, enter any keywords.
3. **Click Import button.**

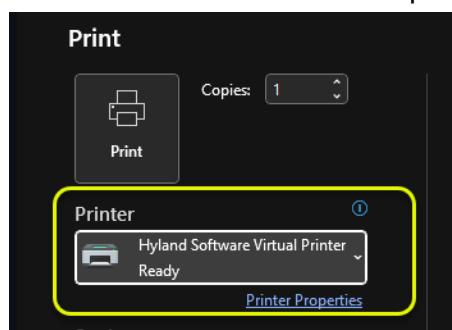
Note: Almost any file type can be imported. If the system does not recognize the file type, email the file to the Helpdesk to have it added.



- **Importing Multiple Files:** Drag and drop files onto the Import screen. The first file will preview, and a list of all files appears on the right. Enter document details for the first file and click Import. The system will move to the next file while retaining the entered information, speeding up batch imports.
- **Importing Multiple Images:** If you drag and drop multiple images onto the import screen you will have the option to combine them into one document or to create individual documents for each. If you choose to combine them they will be saved as one multi-page tiff file.

How to Print to OnBase

You can print from almost any application directly into OnBase. Click Print, select Hyland Software Virtual Printer from the list of printers, and click Print.

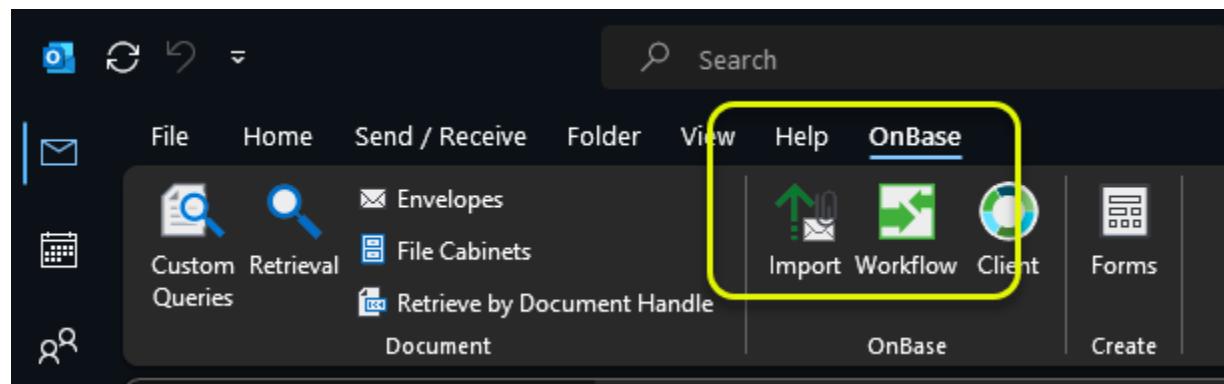


The document will process (which may take a few seconds), then the import screen will appear for entering keywords and saving the document into OnBase.

How to Store Emails & Attachments in OnBase

If you use the Outlook client, you can save emails and attachments directly into OnBase. This is useful for long-term storage, grouping emails with related documents, or saving large attachments to free mailbox space.

1. **Select Email(s):** Choose one or more emails in Outlook, go to the OnBase tab, and click Import.
2. **Index the Email:** The first email appears in a panel on the right. Review the import type (email or attachment). Use Skip to ignore the email and import only attachments if desired.
3. **Apply to Multiple Emails:** Enter the Document Type and keywords, then check Apply to all Messages to use the same information for all selected emails.
4. **Select Attachments (Optional):** Click the attachment box to select specific attachments or skip any you don't want to import.
5. **Import:** Once indexing is complete, click Import to save the emails and/or attachments into OnBase.



How to Create a New Document from an Existing Document

Right-click a document in the search results and select Send To → Create New Document. Then choose the Document Type and enter any desired keywords to index the new document.