

OnBase Web Client

1) Logging into OnBase

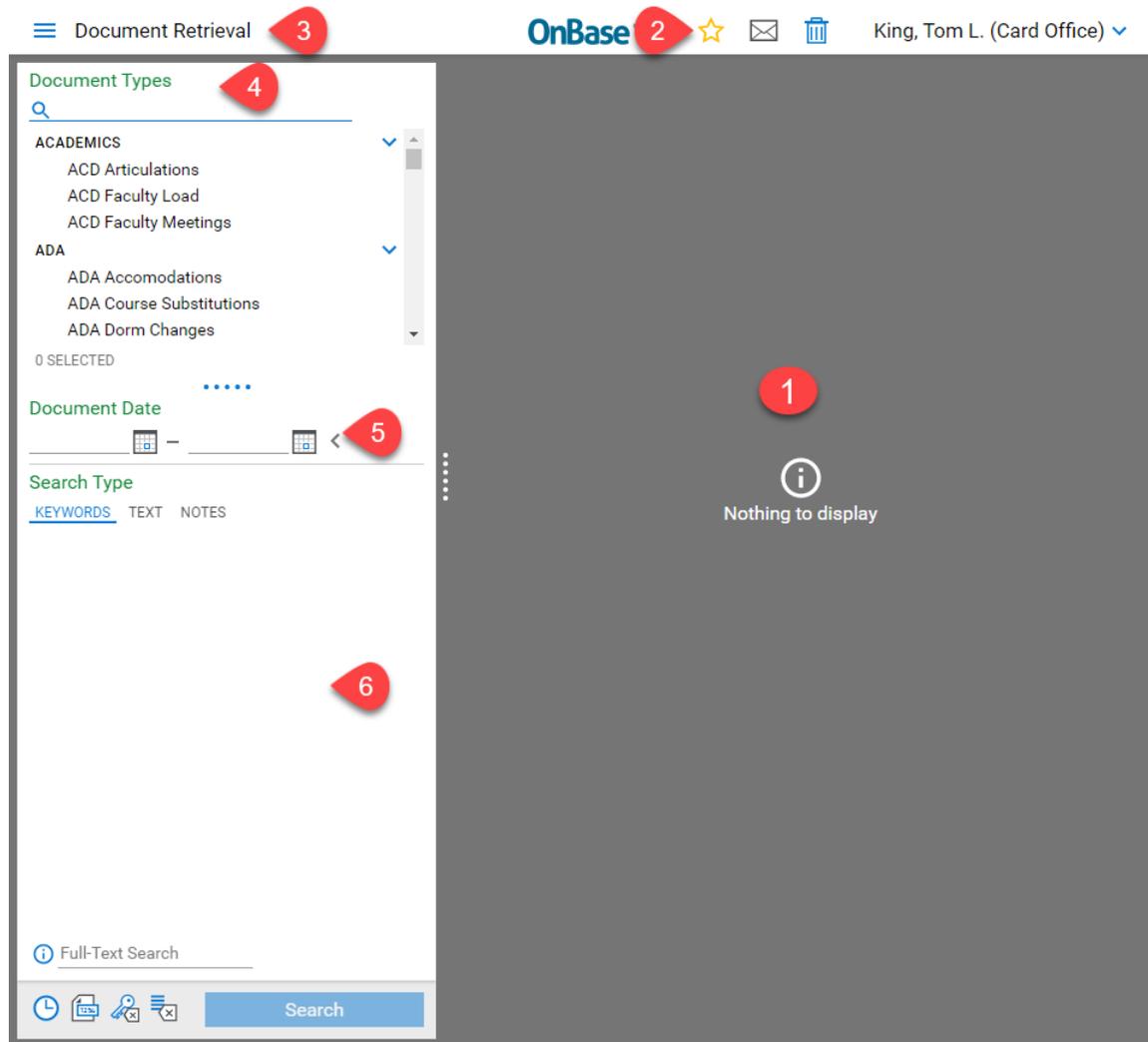
Login

The screenshot shows the OnBase Web Client login interface. On the left, there is a main login form with two input fields: 'Username' and 'Password'. Below these fields are three buttons: a blue 'Login' button, a white 'Cancel' button, and a red 'X' icon. To the right of the main form is an 'External Login' section, which is a grey-bordered box containing a button labeled 'CCSU' with a green checkmark icon to its right.

At the log in screen you will see a spot to enter your username and password. **Do not use that.** Instead click on the button that says CCSU. This will bring you to our single sign on screen where you will use two factor authentication to log in to OnBase.

OnBase Web Client

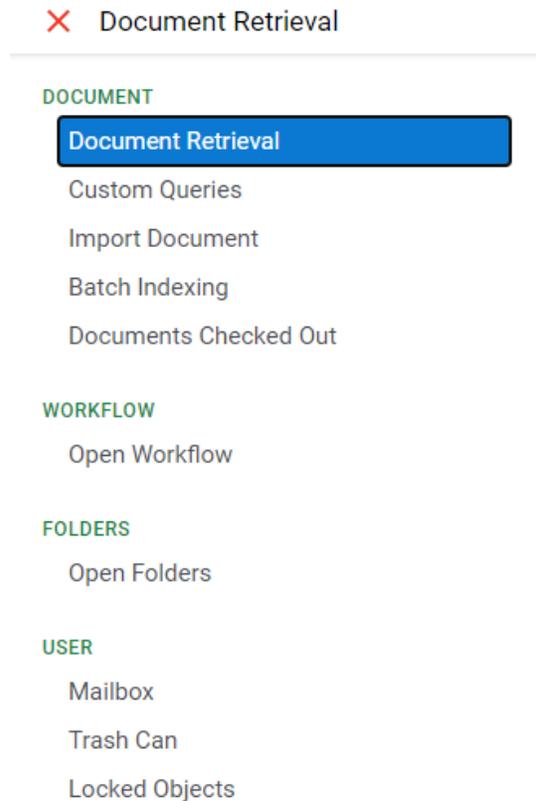
- 2) After you log in you will have a screen like the one below. This is the document retrieval page. Please note that if you are the first person to log into OnBase for that day it can take up to a minute to login. Please be patient.



1. This is where documents will be displayed.
2. Your menu bar where you can check messages that were sent from other OnBase users, your deleted items, and your account. You can set favorites here as well, but those will not stay set once the browser is closed.
3. This displays what screen you are viewing. The three horizontal lines to the left will bring up a menu letting you select other screens. We will look at those later in the next section.
4. Here you can select the document type you want to view. You can also search for the document by name. You will only be able to see documents which you have rights to view.
5. You can restrict the date range when searching for documents here.
6. Once you select a document type the keywords for the document will be displayed in this location. You can fill in some or all of the keywords to help narrow your search.

OnBase Web Client

- 3) There are several categories of menu items. We will primarily be focused on the Document category but will briefly discuss Workflow and User

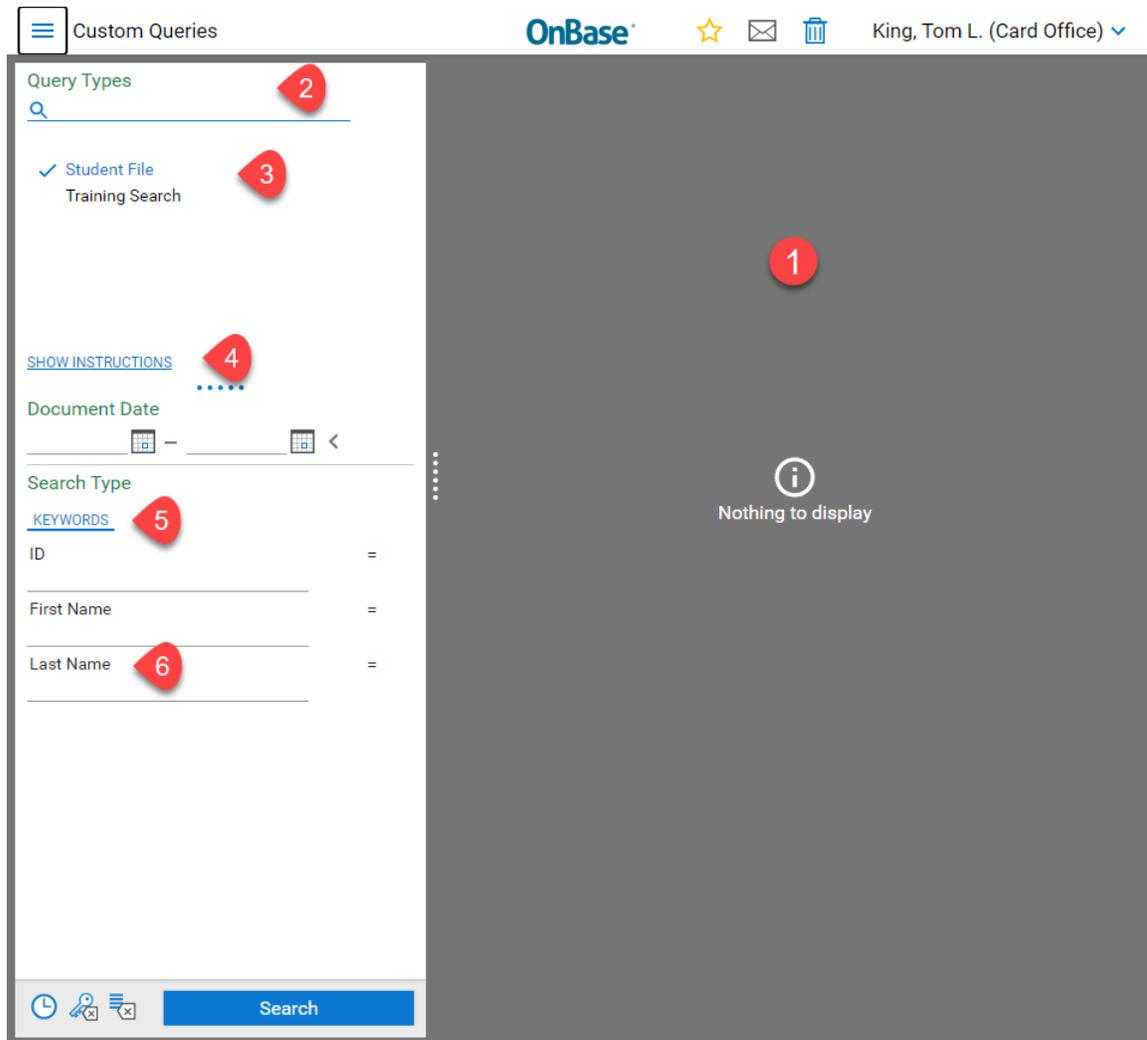


1. Under Document we have the following:
 - I. Document Retrieval as the name implies is for retrieving documents from OnBase and is the screen from item 2.
 - II. Custom queries are specialized queries that will allow you search for documents based on the criteria of the query. This may be used if you are frequently looking for documents that always have the same set of keywords, and you only need to modify one or two keywords on the document.
 - III. Import Document will allow you to import a document into the system. This will usually occur if you are given a file (tiff, PDF, etc.) that you need to bring into OnBase. This should not be happening with great frequency. In most cases you will be scanning documents into OnBase.
 - IV. Batch Indexing goes hand in hand with scanning. After documents have been scanned, they will be placed into a scanning queue where you can then index them. Indexing is the process of selecting the appropriate document type and then adding the keywords to the document.
 - V. Documents Checked Out – will not be used
2. Under Workflow we have:
 - I. Open Workflow which allows you access to your workflows. Workflows will allow the routing of documents to different users.
3. Under User we have the following:

OnBase Web Client

- I. Mailbox which allows you to see documents sent to you by other users. These are documents outside of the workflow process.
- II. Trash Can which contain deleted items
- III. Locked Objects which will not be discussed at this time

4) Custom Queries screen



1. As with the Document Retrieval screen this is where the document will be shown.
2. This will let you search for a custom query.
3. You can select the query you want from the list. The check mark denotes the selected query.
4. Custom queries may have instructions. If they do you can click on the Show Instructions link to view them.
5. This is where the keywords associated with the query can be found.
6. If you click on a keyword, a second line for that keyword will be added. You can then use the Boolean operators AND and OR to link those keywords. In this example you may want to search for someone who has the first name of John and the last name of Doe or Smith. You would fill in the first name as John click the Last Name keyword, to add another Last Name to the list, add the last names of Doe and Smith, then set the operator to OR. This will return a list of all the Student Files with the first name John, and a last name of Doe or Smith.

OnBase Web Client

5) Import Document screen

The screenshot shows the 'Import Document' interface. At the top, there is a 'Select File' section with a 'Choose File' button and the text 'No file chosen'. Below this is the 'Import Settings' section, which includes three dropdown menus: 'Document Type Groups' (set to '<All>'), 'Document Types' (set to 'ACD Articulations'), and 'File Type' (set to 'Image File Format (.???)'). There is also a checkbox for 'Queue for Full-Page OCR' and a 'Document Date' field set to '03/04/2021'. The 'KEYWORDS' section follows, with 'External Institution Name' in red text, indicating it is a required field. Below this are several text input fields for 'Year', 'Conversion ID', 'Legacy ID', 'Legacy Source', 'System', 'Region', 'Institution', and 'Annotated'. At the bottom, there is a blue 'Import' button.

1. This will allow you to select the file you want to import into OnBase
2. The Document Type Groups will allow you to narrow the document types to select from. There are several Document Type Groups. Generally, they are related to a specific area such as the Bursars Office or Registrars. Each of these groups will have a number of different document types.
3. This is where you select the specific document type for the document you are importing.
4. Usually you will import a tiff file into OnBase, but it can handle different file types. This is where you select the type of file you are importing.
5. This section is where the keywords for the document are added. The keywords in red are required anything else is optional however fill in as many keywords as possible as it will make easier to search for the document later.

OnBase Web Client

6) Batch Indexing screen

Batch Indexing

OnBase King, Tom L. (C)

Batch Statuses

INDEX

- Awaiting Index (3)
- Index in Progress (2)

COMMIT

- Committed

Index in Progress (2)

Drag a column header here to group by that column.

SCAN QUEUE	BATCH	BATCH NAME	SCAN DATE-TIME	TOTAL
ZTRN-Training	677	ZTRN-Training - [TRN\1234501-GeorgeWashington]	3/1/2021 6:40:26 PM	2
ZTRN-Training	680	ZTRN-Training - [TRN\1234504-JamesMadison]	3/1/2021 6:40:28 PM	2

1. Displays the list of documents that need to be indexed.
2. You can select from documents that have not yet been indexed or those that were started but were not finished
3. Right clicking on the document will bring up a menu. Select Index Documents to index the document you right clicked.

Index Documents

View Documents

Purge Selected

Refresh List

OnBase Web Client

7) Batch Indexing screen part 2

1. Displays the document to be indexed
 2. Allows you to select the document type for the document to be indexed
 3. The keywords for the document. As with importing a document any keyword in red is required.
 4. If you are indexing documents that will have the same keywords you can click the lock icon to lock those keywords in place. It will then use those keywords on the next document. You can do this for some or all of the keywords.
- 8) Workflow – skipping for now as there are no workflows at this time 3/4/21
- 9) User
1. Mailbox – will allow you to see documents sent to you by other OnBase users.
 2. Trash Can – where you can see items deleted.
 3. Locked Objects -