

OnBase Training

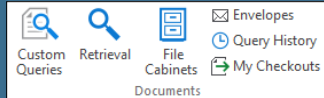
Unity Client Tour (Shown in Document Retrieval context)

Training Resources:

- [Pre-Installation: Welcome to OnBase](#)
- [Premium: End User Training \(Unity\)](#)

Ribbon Groups

The ribbon is grouped into function specific groups that provide content specific commands.



Ribbon

The ribbon consists of buttons that provide quick access to the common functions within OnBase. The ribbon will change to provide customized commands based off of the ribbon group currently open.

Home Tab

Click the home tab on any screen to return to the default ribbon and get access to common OnBase functions.

Layout

The layout serves as the viewer for open documents, workflows and other common functions within OnBase.

Need help?

Click on the help button or Press F1 for the OnBase help files.

Document Information Panel

The document information panel appears on the right and provides information, such as key words, for you to reference quickly and close.

The screenshot displays the OnBase interface with the Document Retrieval ribbon group active. The ribbon includes buttons for Home, Personal Page, Favorites, Custom Queries, Retrieval, File Cabinets, My Checkouts, Forms, Import, Templates, Dashboards, Mailbox, Workflow, Approval Management, My Reading Groups, Batch Scanning, Batch Processing, and Document Tracking. The Document Retrieval pane on the left shows a list of document types and groups, with 'AP - Checks' selected. The search results pane in the center displays a table of 18 documents. The Document Information Panel on the right shows details for a selected document, including document type, document name, document date, keywords, vendor ID, vendor name, invoice number, invoice total, invoice date, PO number, PO amount, PO date, check amount, check number, and check date.

Icon	Name	Type	Date
<input type="checkbox"/>	Check for OFFICE SUPPLY WAREHOUSE in the amount of \$817.91 - Invoice #: 2220	AP - Checks	6/20/2016
<input type="checkbox"/>	Check for PHONE SHACK in the amount of \$2,940.00 - Invoice #: 3220	AP - Checks	6/20/2016
<input type="checkbox"/>	Check for TAP-IT BUTTONS, INC in the amount of \$588.00 - Invoice #: 4220	AP - Checks	6/20/2016
<input type="checkbox"/>	Check for BOONE ELECTRIC CO in the amount of \$2,517.12 - Invoice #: 6220	AP - Checks	6/20/2016
<input type="checkbox"/>	Check for AMEREN-UE NATURAL GAS in the amount of \$1,255.60 - Invoice #: 5220	AP - Checks	6/20/2016
<input type="checkbox"/>	Check for COMPUTERS ARE US in the amount of \$784.00 - Invoice #: 1330	AP - Checks	6/20/2016
<input type="checkbox"/>	Check for OFFICE SUPPLY WAREHOUSE in the amount of \$275.52 - Invoice #: 2330	AP - Checks	6/20/2016
<input type="checkbox"/>	Check for BOONE ELECTRIC CO in the amount of \$2,421.97 - Invoice #: 6330	AP - Checks	6/20/2016
<input type="checkbox"/>	Check for TAP-IT BUTTONS, INC in the amount of \$1,482.25 - Invoice #: 4330	AP - Checks	6/20/2016
<input type="checkbox"/>	Check for OFFICE SUPPLY WAREHOUSE in the amount of \$204.48 - Invoice #: 2110	AP - Checks	6/20/2016
<input checked="" type="checkbox"/>	Check for PHONE SHACK in the amount of \$3,145.80 - Invoice #: 3110	AP - Checks	6/20/2016
<input type="checkbox"/>	Check for BOONE ELECTRIC CO in the amount of \$2,452.48 - Invoice #: 3110	AP - Checks	6/20/2016
<input type="checkbox"/>	Check for AMEREN-UE NATURAL GAS in the amount of \$1,023.52 - Invoice #: 5110	AP - Checks	6/20/2016
<input type="checkbox"/>	Check for AMEREN-UE NATURAL GAS in the amount of \$987.00 - Invoice #: 5330	AP - Checks	6/20/2016
<input type="checkbox"/>	Check for PHONE SHACK in the amount of \$1,087.80 - Invoice #: 3330	AP - Checks	6/20/2016
<input type="checkbox"/>	Check for OFFICE SUPPLY WAREHOUSE in the amount of \$485.10 - Invoice #: 2440	AP - Checks	6/20/2016
<input type="checkbox"/>	Check for AMEREN-UE NATURAL GAS in the amount of \$762.27 - Invoice #: 5440	AP - Checks	6/20/2016
<input type="checkbox"/>	Check for BOONE ELECTRIC CO in the amount of \$2,398.52 - Invoice #: 6440	AP - Checks	6/20/2016

OnBase Training

Document Retrieval

Training Resources:

- [Premium: End User Training \(Unity\)](#)

Document Retrieval Pane

Locate documents across one or many documents types utilizing date range or keywords to limit search results.

Documents Ribbon

The ribbon contains content sensitive commands specific to working with retrieved documents.

Document Viewer

Double click on any search result to open the document in the document viewer layout.

Column Headers

Click a specific column header to sort or group the search results further.

Keyword Boxes

Double click on a keyword box or press F6 to create another search box of the same keyword type.

Wildcard Search

Enter * to initiate a wildcard search that will allow you to locate documents with only part of the keyword (e.g. enter Office* to retrieve all checks for vendor names starting with Office).

Find

After entering all applicable search criteria, click the "find" button to retrieve the appropriate documents.

Search Results Hit List

The viewer will display all retrieved documents based on the search criteria entered.

The screenshot shows the OnBase Document Retrieval interface. The top ribbon contains various toolbars for document management. The left pane shows search criteria for 'AP - Checks' with a wildcard search for 'OFFICE*'. The main area displays a table of search results for 'AP - Checks' dated 6/20/2016. The 'Find' button is visible at the bottom.

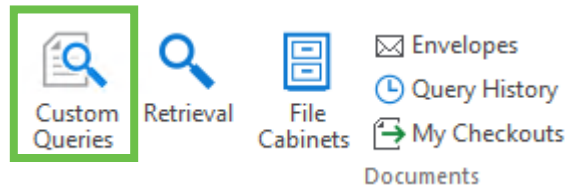
Icon	Name	Type	Date
	Check for OFFICE SUPPLY WAREHOUSE in the amount of \$204.48 - Invoice #: 2110	AP - Checks	6/20/2016
	Check for OFFICE SUPPLY WAREHOUSE in the amount of \$817.91 - Invoice #: 2220	AP - Checks	6/20/2016
	Check for OFFICE SUPPLY WAREHOUSE in the amount of \$275.52 - Invoice #: 2330	AP - Checks	6/20/2016
	Check for OFFICE SUPPLY WAREHOUSE in the amount of \$485.10 - Invoice #: 2440	AP - Checks	6/20/2016

Training Resources:

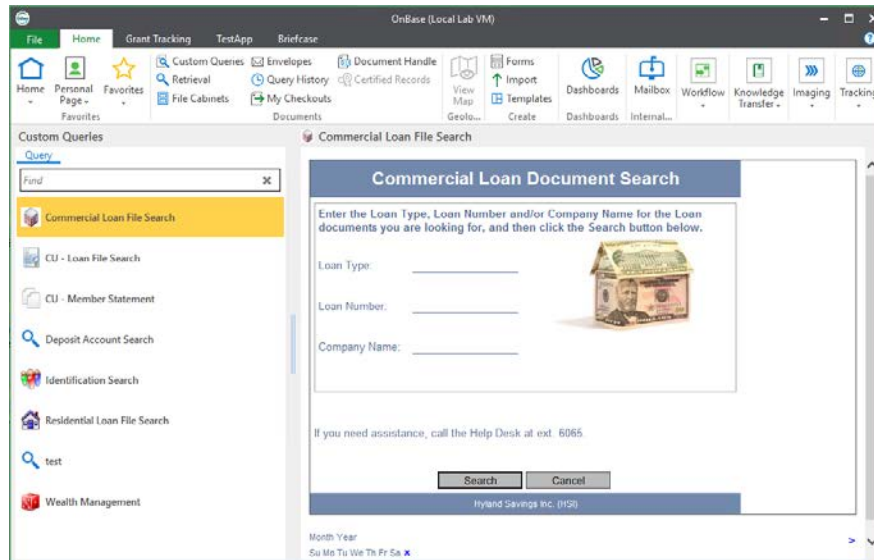
- [Premium: End User Training \(Unity\)](#)

Custom Queries

Custom Queries help to streamline document retrieval by allowing quick access to the most frequently retrieved documents.



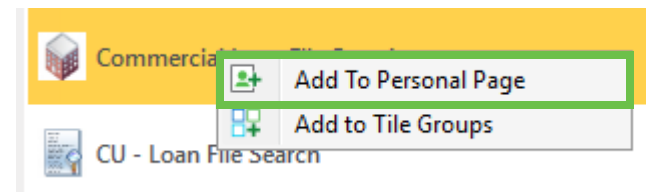
Custom Queries are available from the Home Tab in the Documents Ribbon Group.



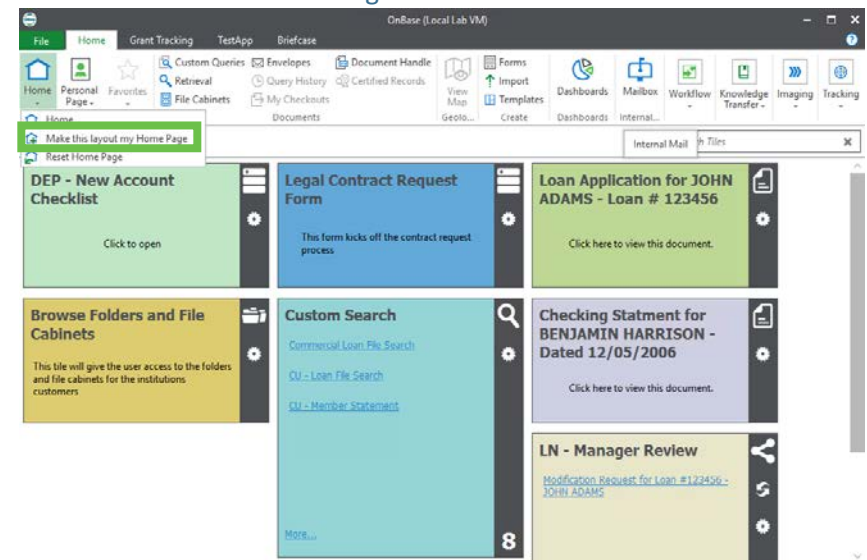
Custom Queries allow you to retrieve and view a collection of documents by conducting pre-defined searches, configured by the system administrator. Once a Custom Query is selected from the list, fill in the appropriate key words and click the search button.

Personal Page

Create an individualized OnBase dashboard that provides shortcuts to frequently used features.



Add specific Documents, Workflow Queues, Custom Queries, e-forms and more to the personal page by right clicking on the feature and selected "Add to Personal Page"



Make your personal page the first thing you see when you log in by making it your home screen, allowing for quicker access to all your assigned work.

OnBase Training

File Cabinet & Folders

Training Resources:

- [Premium: End User Training \(Unity\)](#)

File Cabinets

Click the File Cabinets button on the Home Ribbon to navigate to the folder interface.

Folder Tab

When the Folder Tab is open you will have access to the Find Ribbon Group and all the commands generally specific to folders.

Find Folder Tab

Use the find folder tab to search for a specific folder. It is located under the folder tab and on the top left of the ribbon bar.

Folder Tree

The folder tree displays the different filing cabinets that are available, and expands to allow you to browse the documents in the selected folder.

Missing Document

When configured, folders can mark all missing documents in a different color, so you can see at a glance specific document missing.

The screenshot displays the OnBase (OnBase) application window. The ribbon at the top includes File, Home, HR - Employee Lifecycle System, Working, Briefcase, Folder, Document, Image, and Signatures. The Folder ribbon is active, showing options like Envelopes, Query History, My Checkouts, Forms, Import, Templates, Dashboards, Mailbox, Workflow, My Reading Groups, Batch Scanning, Batch Processing, and Document Tracking. The Folder Tree on the left shows a hierarchy: HR - Audit, HR File Cabinet (expanded to show JASON KNIGHT (Employee File: 3190) with sub-folders Applicant Information, Correspondence, and Employment Documents), and RM - Employee Records File Cabinet. The Selected 1 of 3 Document(s) list shows: HR - W-4 for JASON KNIGHT - 1/12/2017 (highlighted in blue), ...Direct Deposit Form - Not Found (highlighted in orange), and ...Eme... Medical Information - Ni... (highlighted in pink). The Document Viewer in the center displays the Form W-4 (2007) for JASON KNIGHT. The Find Folder panel on the right is open, showing search criteria for Folder Type (HR - Employee Information), Keywords, Name, and Employee ID, with a Find button at the bottom.

Document Viewer

The document viewer displays the document selected in the folder tree.

OnBase Training

Working with Documents

Training Resources:

- [Premium: End User Training \(Unity\)](#)

Add/ Modify Keywords

Selecting the ribbon command or the command from the right click menu will open the Add/Modify Keywords task pane for the selected document. Depending on your rights and the document type, you will have the ability to view and edit a document's keyword Values.

History

Either the command on the ribbon or the right click command will open the Document history dialog box which includes information about all actions taken on a selected document (ie: viewing, updating keywords, etc.), including date and time of the action and what user performed the action. Workflow History is also included.

Cross References

The Cross References task pane can be opened for the selected document by clicking either the ribbon or the right click command. From this pane documents configured as cross references can be automatically retrieved.

Re-Index

Either the command on the ribbon or the right click command will display the Re-index task pane for the selected document. This pane will allow modification to the keywords associated to a document.

The screenshot displays the OnBase software interface. The ribbon at the top includes tabs for File, Home, Contract Manager, Expense Report Management, Employee Lifecycle System Tracking, Vendor Management, Briefcase, Document, and Signatures. The Document tab is active, showing various actions like Revisions, History, Compose Document, Generate Packet, Start a Discussion, Check Out, Re-Index, Delete, DocuSign, and View Notes List. A right-click context menu is open over a document, showing options like Re-Index, History, Cross-References, Compose Document, Generate Packet, Discussions, Properties, Revisions / Renditions, Check Out, Redactions, DocuSign, View Notes List, Show / Hide Notes in Viewer, and Perform Full-Page OCR Processing. The main window shows a search results table with columns for Icon, Name, Type, and Date. The selected document is a check from Firs for \$2,940.00, dated 2/7/2012. The check is marked as 'Void' in red. The interface also shows a 'Document Reveal' pane on the left with 'Document Types and Groups' and 'Keywords and Date Range' sections.

Icon	Name	Type	Date
<input checked="" type="checkbox"/>	Check for OFFICE SUPPLY WAREHOUSE in the amount of \$817.91 - Invoice #: 2220	AP - Checks	6/20/2016
<input checked="" type="checkbox"/>	Check for PHONE SHACK in the amount of \$2,940.00 - Invoice #: 3220	AP - Checks	6/20/2016
<input checked="" type="checkbox"/>	Check for [unclear] in the amount of \$4220 - Invoice #: 4220	AP - Checks	6/20/2016
<input checked="" type="checkbox"/>	Check for [unclear] in the amount of \$6220 - Invoice #: 6220	AP - Checks	6/20/2016

OnBase Training

Notes, Annotations & Highlights

Training Resources:

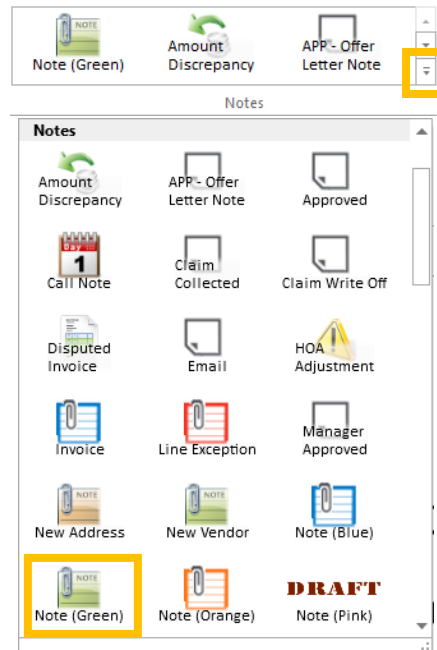
- [Premium: End User Training \(Unity\)](#)

Notes

When an image document is opened in the OnBase viewer the Notes gallery is available in the ribbon.

Scroll through the available notes and click on the document where you would like to place the note.

The note is displayed and expanded on the document. Click within the text field to enter the desired note. Once you are finished you can close the document, no further steps are needed to save the note.

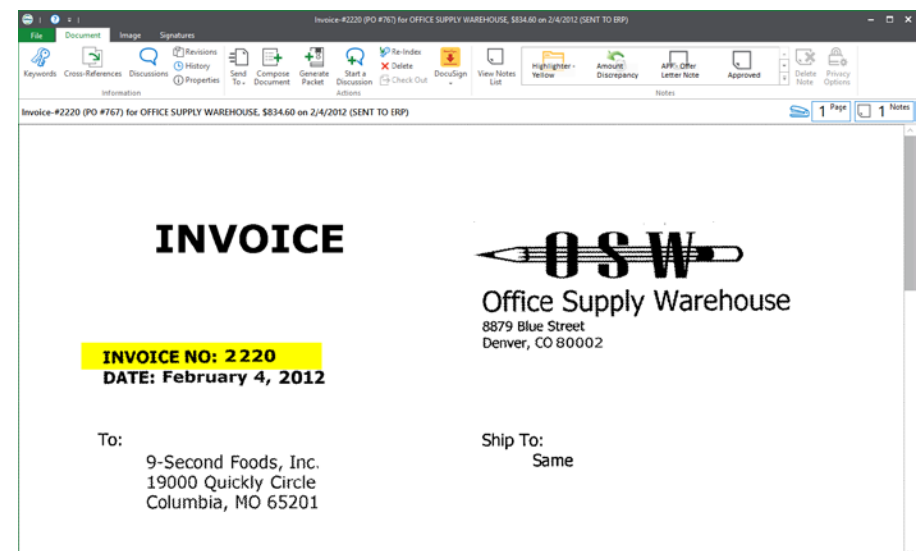
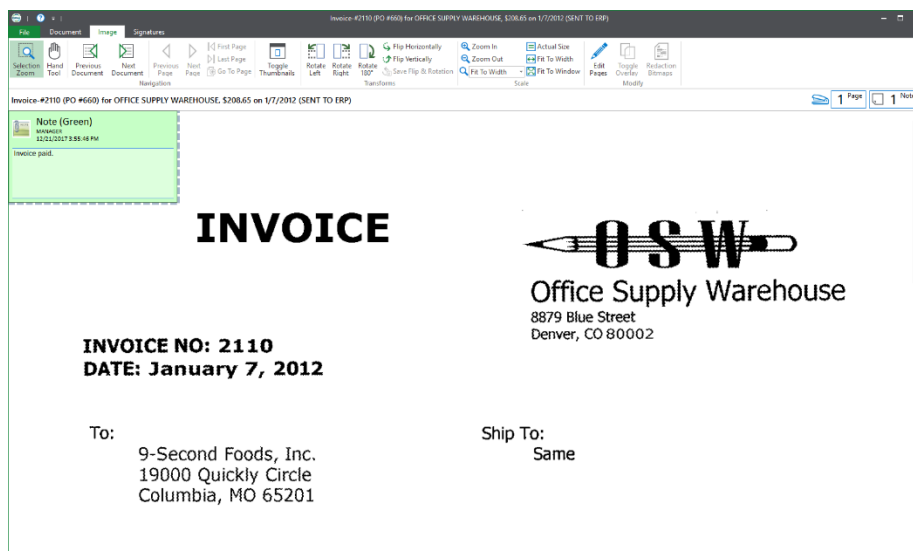
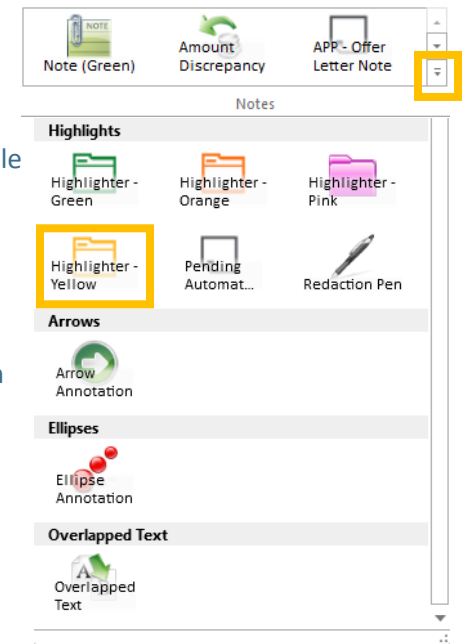


Annotations & Highlights

Annotations and Highlights are available in the Notes gallery when an image document is opened in the viewer.

Similar to notes, select a highlight or annotation, then click and drag where you would like to place the marking on the document image.

Resize by dragging one of the boxes along the edge of the annotation. Saving is automatic.



OnBase Training

Image Tab

Training Resources:

- [Premium: End User Training \(Unity\)](#)

Image Tab

The Image Tab allows access to buttons to resize and reorient an image or PDF document.

Toggle Thumbnails

The Toggle Thumbnails button displays and hides thumbnails from the right panel.

Transform Ribbon Group

Reorient pages of the document by using the degree rotations or the flip commands.

Scale Ribbon Group

Resize the document by magnifying or reducing the view with the zoom options or fitting the document to the width of the window using the "Fit to..." options.

Document Tab

When a document is retrieved, it is displayed in the Document Viewer. The document will open in the Document Tab by default. In order to access image specific commands the Image Tab must be opened.

Navigation Ribbon Group

Use the Navigation Ribbon Group to maneuver to different pages within the document.

Modify Ribbon Group

The Modify Ribbon Group allows access to the Page Editor and Document Separation (See below).

The screenshot displays the OnBase software interface. At the top, there are three tabs: 'Document', 'Image', and 'Signatures'. The 'Image' tab is selected and highlighted in yellow. Below the tabs is a ribbon with several groups of icons. The 'Navigation' group includes icons for Selection Zoom, Hand Tool, Previous Document, Next Document, Previous Page, Next Page, First Page, Last Page, and Go To Page. The 'Transforms' group includes Toggle Thumbnails, Rotate Left, Rotate Right, Rotate 180°, Flip Horizontally, Flip Vertically, and Save Flip & Rotation. The 'Scale' group includes Zoom In, Zoom Out, Actual Size, Fit To Width, and Fit To Window. The 'Modify' group includes Edit Pages, Toggle Overlay, and Redaction Bitmaps. The main content area shows a document page titled 'CORPORATE BRANDING PRACTICES - 2018 - 12/19/2017'. The page content includes the text '9 – SECOND FOODS, INC.' and 'Corporate Graphics and Communications'. A large graphic of a book cover with the text 'Volume 3' is visible on the right side of the page. A vertical scrollbar on the right indicates the document has 8 pages.

9 – SECOND FOODS, INC.

Corporate Graphics and Communications

OnBase Training

Document Separation Tab

Training Resources:

- [End User Training \(Unity\)](#)

Document Separation Tab

Navigate to the Document Separation window from the Image Tab on an open document, then select the Document Separation button in the Modify Ribbon Group (See above).

Group by Document Button

The Document Separation Workspace is enabled when the Group by Document button is selected, allowing users to reorder, add, or remove pages of a document.

Modify Ribbon Group

With pages selected within the Document Separation Workspace, options to Split pages into separate documents, join selected pages, and copy selected pages are enabled.

Apply Ribbon Group

Click the Save and Close All button to save each document in the Document Separation layout into OnBase or select Cancel. Both buttons will close the Document Separation Tab.

The screenshot shows the OnBase Document Separation interface. At the top, a ribbon contains various buttons: 'Save and Close All', 'Cancel', 'Browse', 'Acquire', 'Group by Document', 'Keywords', 'Thumbnail Settings', 'Split', 'Join', 'Copy', 'Flip', 'Rotate Left', 'Rotate Right', 'Delete Mode', 'Delete Selected', 'Undo', and 'Redo'. Below the ribbon, there are two main workspaces. The top workspace, titled 'CORPORATE BRANDING PRACTICES - 2018 - 12/19/2017', displays a grid of document thumbnails numbered 1 through 8. The bottom workspace, also titled 'CORPORATE BRANDING PRACTICES - 2018 - 12/19/2017', displays a grid of document thumbnails numbered 4 through 7. A 'Page Holder' panel is visible on the right side of the interface. A yellow box highlights the 'Group by Document' button in the ribbon. A green box highlights the 'Split', 'Join', 'Copy', and 'Flip' buttons in the ribbon. A blue box highlights the 'Save and Close All' and 'Cancel' buttons in the ribbon. A red box highlights the 'Keywords' button in the ribbon. A yellow box highlights the 'Page Holder' panel. A red box highlights the 'Document Separation Workspace' area. A blue box highlights the 'Apply Ribbon Group' area. A green box highlights the 'Document Separation Tab' area. A blue box highlights the 'Group by Document Button' area. A blue box highlights the 'Modify Ribbon Group' area. A blue box highlights the 'Keywords' area. A blue box highlights the 'Page Holder' area. A blue box highlights the 'Document Separation Workspace' area.

Keywords

Select the View/Edit Keywords button to display the keywords panel. Keywords are inherited from the source document and should be updated.

Page Holder

Pages can be dragged and dropped into the Page Holder for later use. To remove a page from the Page Holder, click and drag the page into a document in the Separation Workspace.

Document Separation Workspace

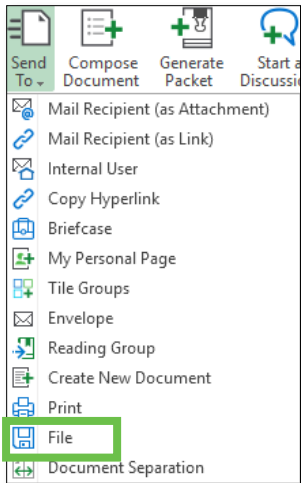
Documents are separated, appended, reordered, and indexed in the Separation Workspace. To reorder documents, click the page of the document you would like to move and drag the page to an empty space in the Separation Workspace. A red bar appears between documents to show where the selected document will be placed.

OnBase Training

Saving, Printing & User Options

Training Resources:

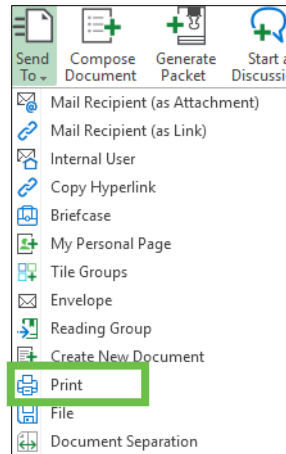
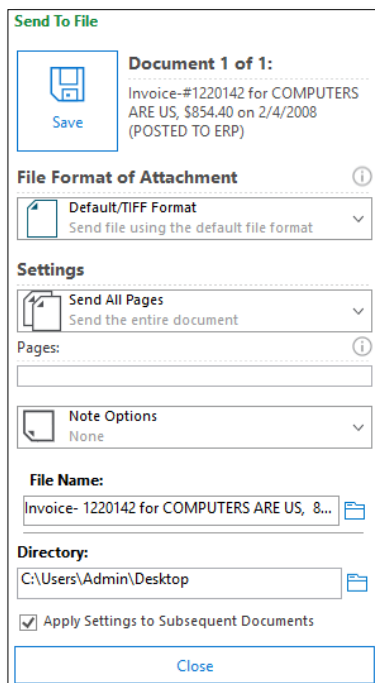
- [Premium: End User Training \(Unity\)](#)



Saving

When a document is open, navigate to the Document Tab. In the “Actions” Ribbon Group select “Send To”. In the drop down choose the “File” option.

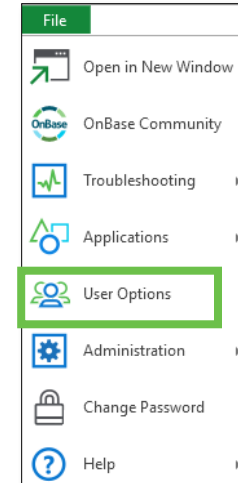
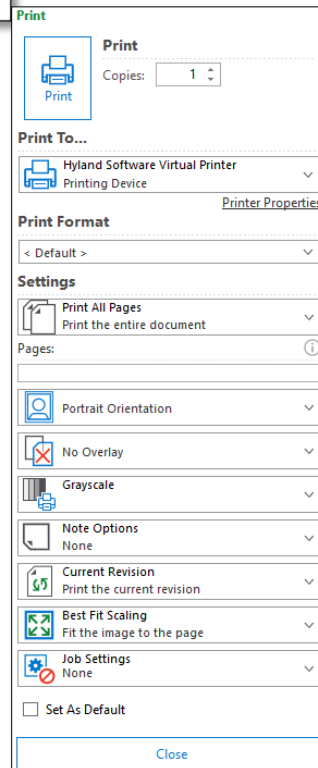
The “Send to File” menu will open in the Task Pane. Select the appropriate file format, directory destination and apply any additional setting. Once you have selected the options that you need, select the “Save” button.



Printing

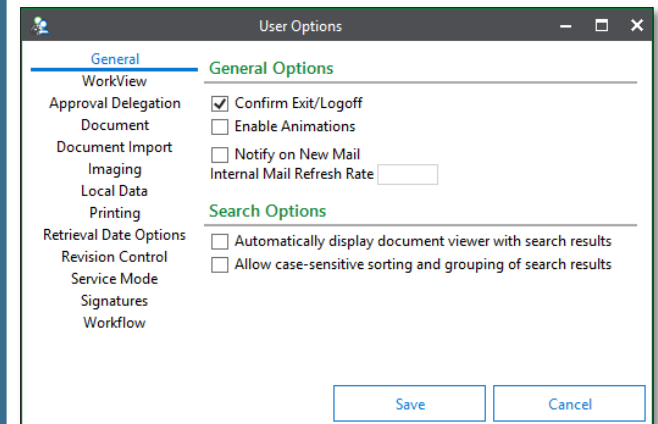
When a document is open, navigate to the Document Tab. In the “Actions” Ribbon Group select “Send To”. In the drop down choose the “Print” option.

The “Print” menu will open in the Task Pane. Select the appropriate printer, format and apply any additional setting. Once you have selected the options that you need, select the “Print” button.



User Options

Select User Options from within the application menu, by selecting the File option in the top left hand corner of the application.



The User Options dialog box will open on the screen. Any settings that are saved within User Options will travel with the User login across different work stations.

OnBase Training

Working with PDF & Office Documents

Training Resources:

- [Premium: End User Training \(Unity\)](#)

Document Tab

When working with a PDF or Office Document the Document Tab must be selected to access the OnBase commands that are generally available through the right click options.

Document Ribbon Group

When the Document Tab is open you will have access to the Document Ribbon Group and all the commands generally accessed through the OnBase right click options.

The screenshot displays the OnBase software interface. At the top, the 'Document' tab is selected, highlighted with a yellow circle. Below it, the 'Document Ribbon Group' is visible, containing various icons for actions like 'Keywords', 'Cross-References', 'Discussions', 'Revisions', 'Send To', 'Compose Document', 'Generate Packet', 'Start a Discussion', 'Delete', 'Check Out', 'DocuSign', 'View Notes List', 'Amount Discrepancy', 'APP: Offer Letter Note', 'Approved', 'Arrow Annotation', 'Call Note', 'Delete Note', and 'Privacy Options'. The main content area shows a document titled 'DRAFT DAVIS AGENCY NON-DISCLOSURE AGREEMENT 1/19/2017 (Contract #: 570) (Rev: 2)'. The document text includes a title 'NON-DISCLOSURE AGREEMENT' and several paragraphs of text. A right-click menu is open over the text, showing options like 'Cut', 'Copy', 'Paste Options', 'Expand/Collapse', 'Font...', 'Paragraph...', 'Smart Lookup', 'Synonyms', 'Translate', 'Hyperlink...', and 'New Comment'. The menu is highlighted with a green circle.

Right Click Menu

When working with a PDF or Office Document the standard OnBase right click options is unavailable. When right clicking, the native applications options will open (Microsoft Word's menu is shown).

OnBase Training

Document Imaging- Scanning

Training Resources:

- [Premium: End User Training \(Unity\)](#)
- [Quick Look: Scanning Tips and Tricks](#)

Scan

Scan in individual or large batches of documents to convert paper files into electronic image documents.

Scan Queue

Limit the document types that a document could be classified to and defines additional processing on the document (e.g. bar code processing).

Batch Pane

Recent scan batches and their current status will be outlined in the Batch Pane.

Configuration Ribbon Group

Allow users to select the scanner that will be used for scanning and specify settings for the scanner, documents and file compression.

No Index

Select no index when scanning in batches that contain different document types.

Pre-Index

Select pre-index when scanning batches of documents with the some of the same document properties which will be applied to the whole scan batch. This scan mode will always require additional indexing.

Full Index

Select full index when using bar codes or if no manual indexing is needed.

Index Pane

This panel allows for indexing, which is the process of classifying a document by associating it with keyword values.

Batch Scanning

Scan Queue

Find

- AP - Direct Pay (AC) [4]
- AP - Vendor Invoices [0]
- AP - Vendor Invoices (ICAP) [1]
- AP - Vendor Invoices (IDC) [1]
- HR - Emergency Medical Forms [0]
- HR - Employee Documents (IDC) [0]
- HR - Onboarding Documents [0]
- HR- Hiring Documents (AC) [0]
- Import_9SF [0]
- NAV - AP Invoices [0]
- NAV - Vendor Invoices (ICAP) [0]

Batches

Batch #	Batch Name	Scan Date	Status	Total Documents
288	10/19/2017 - MANAGER	10/19/2017 12:34 PM	Awaiting Index	1
289	10/19/2017 - MANAGER	10/19/2017 12:40 PM	Awaiting Advanced Capture	1
290	10/19/2017 - MANAGER	10/19/2017 12:40 PM	Awaiting Index	1
291	10/19/2017 - MANAGER	10/19/2017 1:11 PM	Awaiting Index	1

Scan Mode

No Index Pre-Index Full Index

Document Type
AP - Direct Pay Form

Document Date
12/27/2017

Keywords

Vendor ID
Vendor Name
Street Address
City
State
Zip Code
Department Number

Options

Scan Sweep

OnBase Training

Document Imaging - Import

Training Resources:

- [Premium: End User Training \(Unity\)](#)

Browse

Browse the documents on your computer and import them into the OnBase system to be indexed and archived.

Document Type

Document Types group documents with similar characteristics for more effective indexing.

Keyword Value

A keyword is specific value that helps to identify documents in the system for easy retrieval.

Import

After indexing the document with the available information, click the upload button to finish the process.

Import Ribbon

The ribbon contains content sensitive commands specific to working with imported documents.

Document Viewer Layout

The viewer will display a preview of the document imported into the system to provide easy access to important information needed for indexing.

The screenshot shows the OnBase (OnBase) application window. The ribbon at the top includes 'Home', 'Contract Manager', 'Expense Report Management', 'HR - Employee Life Cycle System Tracking', 'Vendor Management', 'Briefcase', and 'Import'. The 'Import' ribbon contains buttons for 'Browse', 'Acquire', 'Import', 'Cancel', 'Move Up', 'Move Down', 'Remove', 'Remove All', 'Rotate Left', and 'Rotate Right'. Below the ribbon, the 'Import' pane is visible, showing fields for 'Document Type Group' (Accounts Payable), 'Document Type' (AP - Checks), 'PDF', 'Document Date' (12/27/2017), and a 'Keywords' section with input fields for 'Vendor ID', 'Vendor Name', 'Invoice Number', 'Invoice Total', 'Invoice Date', 'PO Number', 'PO Amount', 'PO Date', 'Check Amount', 'Check #', and 'Check Date'. The document viewer on the right displays a check from 9second FOODS, dated 4/10/2008, for the amount of 939.82, payable to COMPUTERS ARE US. The check number is 674. The MICR line at the bottom of the check is ⑆04100124⑆ 41373000⑆ 674 ⑆0000093982⑆.

Index Pane

This panel allows for indexing, which is the process of classifying a document by associating it with keyword values.

*AutoFill Keyword Sets

AutoFill Keyword Sets help to increase the speed and accuracy of indexing. When configured, manually enter the primary keyword and press tab to complete indexing.

OnBase Training

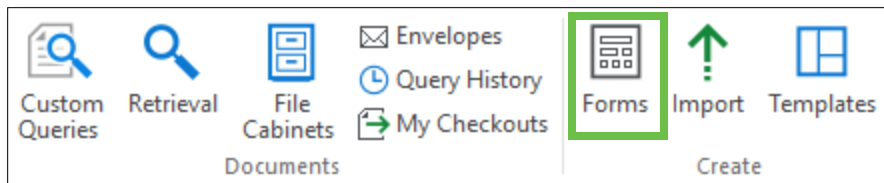
Unity Forms & Virtual Print Driver

Training Resources:

- [Quick Look: Let's Play Unity Forms](#)
- [Premium: Unity Forms Introduction](#)

Unity Forms

In addition to importing documents into OnBase, many users use Unity Forms to start WorkFlow processes, such as a time off request or an expense reimbursement process, within OnBase.

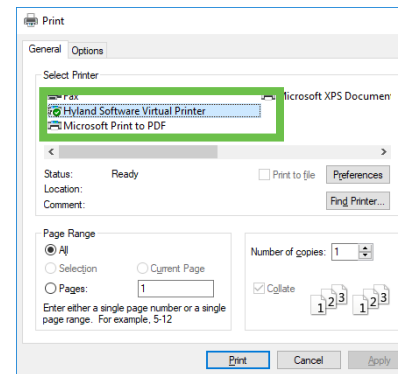


Forms are available from the Home Tab in the Create Ribbon Group. In the Forms layout there is a list of all forms that are available to a user. Select the appropriate form, and fill in the field values before clicking the submit button.

A screenshot of the OnBase Forms interface. The 'Forms' ribbon is active, and the 'Direct Deposit Form' is selected. The form contains sections for 'Account Information', 'Accounts', 'Bank Information', and 'Acceptance'. The 'Acceptance' section has a signature line and a checkbox for 'DECLINE Direct Deposit'. The 'Bank Information' section includes fields for Bank Name, Account Number, Routing Number, and Deposit Amount.

Virtual Print Driver

To import a single document directly into OnBase from any applications print function, use the Virtual Print Driver.



When logged into OnBase, open the document that you want to “print” to OnBase. Select Hyland Software Virtual Printer from the list of printers and click print.

An import dialog box will appear. Select the appropriate document type and fill in the required keywords. Click Upload.

A screenshot of the OnBase Perform Import dialog box. The 'Document Type Group' is set to 'Guide to Enterprise Content Management (ECM) | Document Management 101 - Naviant'. The 'File Type' is 'Microsoft XPS Document'. The 'Keywords' field is empty. The 'Import' button is highlighted.

OnBase Training

Workflow

Training Resources:

- [Pre-Installation: Welcome to OnBase](#)
- [Premium: End User Training \(Unity\)](#)
- [Preparing for Workflow](#)

Life Cycles

A lifecycle represents a business process within OnBase. All Life Cycles available to a user will display in the Life Cycles Pane.

Apply Filter

Click to select a pre-configured custom query to apply to the Inbox pane. Filters can be used to sort or limit documents that appear in the inbox.

Task Ribbon Group

The task ribbon group is made up of ad hoc tasks that allow a user to take action on a document. These options will change depending on the stage of the business process that the document is in.

Workflow Queues

Workflow queues represent the state of a document within the respective Life Cycle. Specific activities take place in each queue.

Inbox Pane

The inbox lists all the documents that are currently in the selected queue's stage of the business process.

OnBase (OnBase)

File Home Workflow Contract Manager Expense Report Management HR - Employee Lifecycle System Tracking Vendor Management Br Document Image Signatures Queue Administration

Change Layout Secondary Viewer Refresh Apply Filter Auto Work Override Auto-feed Route Item Take Ownership Release Ownership Edit/View Distribution Submit for Approval Submit for Multiple Approval Reject Needs Review Send to Exceptions

Life Cycles

Search...

- AP - Invoice Eform Processing
- AP - Invoice Processing
 - Initial (0)
 - Invoice Review (GL Coding) (2)
 - Multiple Approvers (0)
 - Activity Approval (0)
 - Review (0)
 - Invoice Exceptions (3)
 - Rejected (0)
 - Pending Post to ERP (4)
 - Sent to ERP (0)
- AP - Naviant Invoice Demo
- AP - Naviant OCR Invoice Demo
- APP1 - Job Applicant Screening
- APP2 - Job Applicant Interviewing

Inbox

Icon	Name	Entry Date
	Invoice-#44053 for STAPLES, \$1,340.00 on 7/4/2014 (PROCESSING)	6/23/2017 8:30:52 AM
	Invoice-#2813308004 for VENDING SOLUTIONS, \$448,74 on 5/2/2013 (PROCESSING)	10/17/2017 3:52:49 PM

Invoice Review (GL Coding) 2 Items

Primary Viewer

Invoice-#44053 for STAPLES, \$1,340.00 on 7/4/2014 (PROCESSING)

1 Page

INVOICE

(412) 977-2248

BILL TO:
HYLAND SOFTWARE INC.
28500 CLEMENS RD.
WESTLAKE, OH 44145

SHIP TO:
HYLAND SOFTWARE INC.
28500 CLEMENS RD.
WESTLAKE, OH 44145

Ship Via	Terms	Page
	NET 15	1

Pack	Unit	P/U	Ext. Price	Tax
2	2.00	EA	60.00	A
1	200.00	EA	400.00	A
1	500.00	EA	500.00	A
1	5.00	EA	250.00	A

User Interaction

Related Documents Folder

The Related Document Folder contains documents that are linked to the primary viewer document with at least one common Keyword. Related documents can be opened by double-clicking on the documents.

Workflow Ribbon

Contains context sensitive commands specific to working with the documents in the workflow process.

Document Viewer Layout

The viewer displays the document selected in the inbox.

OnBase Training

WorkView | Case Manager - Filter View

Training Resources:

- [Quick Look: WorkView | Case Manager](#)

Filter

A filter is a query that displays objects in a particular class. Filters can be used to return objects based on fixed attribute values or can prompt users for additional search parameters.

Application

An application is a custom configuration created using WorkView that manages data-driven and transactional processes. Applications configured as “always on” will appear as a tab in the ribbon.

Tabbed View

Navigate between open Filters using the tabbed view above the filter results.

Filter Results

The viewer will show a list of all the objects found via the selected filter.

Object

An object is an instance of an application. Objects consist of the individual data attributes pertaining to a given object (think of a row of data in an Excel worksheet).

Filter Bar

Filter bars are used to group related filters together.

The screenshot displays the OnBase WorkView interface for the Vendor Management application. The ribbon at the top includes tabs for File, Home, Contract Manager, Expense Report Management, HR - Employee Lifecycle System Tracking, Vendor Management, Briefcase, and Filter. The Vendor Management ribbon contains various actions such as Open, Create, Delete, Add to Favorites, Add to Personal Page, Add to Tile Groups, Save Filter Settings, Reset Filter Settings, Display Column Chooser, Subfilter, Print, Print Preview, Export to Excel, Compose Document, Refresh, Retrieve all records, and Display as Dashboard. The left-hand pane shows a list of filters under the Vendor Management application, including Vendors, Contract Management, Risk Management, Incidents, My Custom Filters, and Evaluations. The 'All Vendors (30)' filter is selected. The main area displays a table of vendor records with columns for ID, Vendor Name, Vendor Type, Description, Primary Vendor Contact, and Vendor Status. The table shows 30 records, with the first few rows highlighted in yellow. The status bar at the bottom indicates 'Currently viewing 30 of 30 records' and 'Notifications (0)'.

ID	Vendor Name	Vendor Type	Description	Primary Vendor Contact	Vendor Status
117	HYLAND SOFTWARE INC.	IT & TELECOMMUNICATIONS	Develops the ECM Suite known as OnBase. Solves business problems related to doc management, case management, business process management, etc.	Steve Tillman	PREFERRED
122	BARACUDDA FIREWALLS	IT & TELECOMMUNICATIONS	World class firewall software	JOHN ARROW	APPROVED
134	BECHTEL	ENGINEERING	shipping	MARK GRIMES	APPROVED
143	PHILLS LAWN CARE CO.	PROFESSIONAL SERVICES	Lawn care company in Westlake, Oh.	PHIL SIMONE	APPROVED
149	TALLMAN SOLUTIONS LTD	IT & TELECOMMUNICATIONS	Case Management solution provider.		APPROVED
207	DERRICK'S EMPORIUM	BUSINESS PRODUCTS & SERVICES	Derrick's is the new proposed vendor for our kitchen supplies		APPROVED
208	SERVE-A-LOT	BUSINESS PRODUCTS & SERVICES	We need to find a vendor for our growing needs for server administration.		APPROVED
209	PAULA'S DONUTS	BUSINESS PRODUCTS & SERVICES	Paula makes the best donuts. We should make her the vendor of choice for donuts during Monday Morning Meetings.		APPROVED
233	PEACH'S		askdjncdsaj		APPROVED
64	COMPASS LOGISTICS	FLEET & MINOR LOGISTICS SERVICES	Compass Logistics picks up and delivers anywhere in the Continental United States.	FRED THOMAS	APPROVED
66	EMPIRE BUILDING	BUSINESS PRODUCTS & SERVICES	Empire Building designs and constructs land and sea oil platforms. They also assist in the design of specialized equipment.	EMILY ANDREWS	APPROVED
67	ESOL TEACH TEC	ENGINEERING	Is an organization who teaches the knowledge and principles related to the professional practice of engineering. It also provides a service which allows our engineers to renew their certifications. It includes the initial education for becoming an engineer.	STACEY PETERS	APPROVED
68	FAST TRAVEL	TRAVEL & ACCOMMODATION	Fast Travel is a convenient and speedy service that provides customers with easy access to available hotel rooms, airline tickets and rental cars.	CHRIS JANSON	APPROVED
69	GLASS REPAIRS CO.	PROFESSIONAL SERVICES	Glass Repairs Co. is an automotive glass and claims management company based in Cleveland, Ohio, United States.	ROBERT KINGS	APPROVED
70	HIGH SPEED	PROFESSIONAL SERVICES	High speed internet provider.	FRED SPORTS	APPROVED
71	LABOR FORCE	PROFESSIONAL SERVICES	Labor Force provides temporary laborers for any type of work. Workers are polite, attentive and ready to work.	CAROL WALEN	APPROVED
73	MAGNETS UNLIMITED	BUSINESS PRODUCTS & SERVICES	Custom and specialty magnets can be created and purchased from Magnets Unlimited. They conduct high quality work and reasonable prices.	NICK RICHARDSON	APPROVED

OnBase Training

WorkView | Case Manager - Object View

Training Resources:

- [Quick Look: WorkView | Case Manager](#)

History

The History button allows users to view the complete history of an object (e.g. changes to attribute values).

Object View

User friendly visual representation of data attributes associated with an open object.

Vendor # : 117 - HYLAND SOFTWARE INC.

File Vendor Tasks

Save Save and Close Copy Object Refresh Send Email Add to -

History Folders Documents Forms -

Compose Discussions Print Start a Discussion Print Preview

First Object Previous Object Next Object Last Object

General Product Contract Performance Incidents Additional Contacts Notes & Tasks Administration Subcontractors Demo Admin

Vendor Name: HYLAND SOFTWARE INC. Vendor #: 117 Vendor Type: IT & TELECOMMUNICATIONS Account Owner: Tom Davis

Vendor Details

Vendor Name	Vendor Type	Account Owner
HYLAND SOFTWARE INC.	IT & TELECOMMUNICATIONS	Tom Davis

Address 1: 28500 CLEMENS RD. Address 2:

City: WESTLAKE State: OH Zip Code: 44145

Phone: (440)788-5000 Fax: Website: WWW.HYLAND.COM

Description: Develops the ECM Suite known as OnBase. Solves business problems related to doc management, case management, business process management, etc.

Primary Vendor Contact

Full Name	Title	Phone 1	Email
Steve Tillman	Account Manager	(440)788-6285	steve.tillman@onbase.com

Point of Service

Location Name	Location	Location Phone
<input type="checkbox"/>	HQ	28500 Clemens Rd. Westlake, OH 44145 440-788-5000

1 - 1 of 1 records Show 100 records

Tags

Please provide common search tags (In a comma separated fashion)

Vendor Management, ECM, Case Management, Document Management

Folders and Documents

These options allow a user to view electronic documents associated with an object. You can expand a folder and double-click on a document to open it.

Attributes

An attribute is information that defines an object (Think of Column headers in Excel).

OnBase Training

Reporting Dashboards

Training Resources:

- [Premium: Reporting Dashboards](#)

Full Screen Option

Select any dashboard item and make it full screen by selecting the full screen button in the ribbon or double clicking on the item.

Reporting Dashboard Ribbon

The ribbon contains content sensitive commands specific to working with dashboard item.

Tabbed View

Navigate between open dashboards quickly by using the tabbed view above the dashboard items.

Dashboard Gallery

The dashboard gallery lists all of the dashboards and categories available to a user.

Filters

Different types of filters can be configured. Unselect the types you wish to omit from the dashboard. Other dashboard items will update automatically.

Dashboard Item

Dashboard items are visual representations of data in OnBase- including grids, pie charts, bar graphs and more.

The screenshot shows the OnBase Reporting Dashboard for Contract Management. The ribbon at the top contains various actions like 'Full Screen', 'Clear All Filters', 'Parameters', 'Refresh', 'Share Dashboard', 'Send To', 'Copy to Clipboard', 'Print', and 'Export Data'. The dashboard gallery on the left lists various reports and dashboards. The main area displays several items:

- Contracts By Type:** A bar chart showing the count of contracts for various types. The legend includes: Vendor Master Agreement, Rental Agreement, Professional Service Agreement, Privacy Agreement, Non-Disclosure Agreement, Master Service Agreement, Contractor Agreement, Change Order, Broker Agreement, Blanket Service Agreement, Bid Site Terms, Background Check, and Amendment.
- Contract Types:** A list of contract types with checkboxes for filtering. All types are currently selected.
- Contract Status:** A pie chart showing the distribution of contract statuses: Complete, Approved - Awaiting Signed Agreement, Legal Admin Review, and Legal Approved - Awaiting Response.
- Contract Request Details:** A table listing contract details for various vendors and contract types.
- Average Days to Approval:** A KPI card showing the average days to approval is 43.5.
- Contract Status by Admin:** A stacked bar chart showing the count of contracts by type and status for different administrators.

OnBase Training

Outlook Integration

Training Resources:

- [Pre-Installation: Welcome to OnBase](#)
- [Premium: Outlook Integration](#)

Workflow

Access all of the capabilities of Workflow in the Unity interface from within Outlook.

Import From File

Browse for a document on your computer and upload it into OnBase after indexing.

Exit OnBase

Navigate back to Outlook by closing the OnBase window once your task is completed.

Document Retrieval

Access the Unity based retrieval from Outlook. Once a document is retrieved the document can be opened in the Unity viewer allowing for cross references, notes, key words and other tasks to become available.

Configured Outlook Folders

Outlook folders can be configured to automatically start the import process into OnBase. Simply drag and drop the message into the folder to start the process. Or select Import from the ribbon bar.

Import Pane

Once an e-mail has been placed into a configured folder the Import process will automatically begin for the email and any attachments.

Automatic Indexing

When using a configured folder to import a document certain keyword values can automatically populate aiding in the indexing process.

The screenshot displays the Outlook interface with several OnBase integration elements highlighted. The ribbon includes 'Import' and 'Workflow' buttons. The folder list on the left shows 'OnBase Resumes' with sub-folders for 'Development', 'Nursing', and 'Sales'. The 'Import Document' pane is open, showing fields for 'Document Type Group' (Human Resources), 'Document Type' (APP - Resume), 'File Type' (Image File Format), and 'Document Date' (01/22/2017). The 'Keywords' section contains fields for Name (SAM HASTINGS), Resume ID (5485), Phone ((216)824-3982), Address (4876 BEAR DR.), City (BEDFORD HTS), State (OH), Zip Code (44146), and Department Code. The 'Import' button is highlighted in yellow.

OnBase Training

OnBase Studio

Training Resources:

- [Quick Look: Workflow and OnBase Studio](#)
- [Premium: Introduction to OnBase Studio](#)
- [Premium: Workflow Configuration with OnBase Studio](#)

Repository Pane

Access Workflow configuration repositories (databases) via ODBC or App Server connections.

Workflow Tab

When selected, users have access to all life cycles and queues within the selected repository.

Tree Format

Displays all configured life cycles, queues, rules, actions and task in a hierarchal structure.

OnBase Studio Ribbon

The Studio ribbon is made up of ad hoc tasks that allow a user to configure Workflows. The tasks needed to create life cycles, queues, rules, actions and tasks can be found under the Home and Workflow Tabs.

Design Pane

Displays life cycles and queues graphically with transition arrows that represent movement between queues.

Properties Pane

All configuration choices and changes are made within the Properties Pane. The pane changes contextually based off of the option selected within the studio.

Workflow Doctor

Detects errors in real-time. There are two levels of notifications displayed. Errors will prompt you to a critical item needing attention immediately and a warnings will alert you to possible issues.

The screenshot displays the OnBase Studio interface for configuring a workflow. The main window is titled "HR - Employee Review Process" and shows a BPMN diagram with tasks like "From Review Timer...", "Manager Review", "Employee Acknowledgement", and "Ready For HR". The interface includes a ribbon with tabs like "Home", "Workflow", "Life Cycle", "WorkView", "BPMN", "Unity Scripts", "Unity Integrations", "Integration Services", "Notifications", "Capture Process", "Design", and "Format". A "Repository Pane" on the left shows a tree structure of workflow items. A "Properties Pane" on the right shows configuration options for the selected workflow. A "Workflow Doctor" pane at the bottom shows a table of issues.

Type	Name	Description	Scope
Warning	Task List	Send to HR Ad Hoc task is disabled	HR - Employee Review Process