

Florida
State
University



OnBase - Web Client
Quick Reference Guide
Basic Functionality



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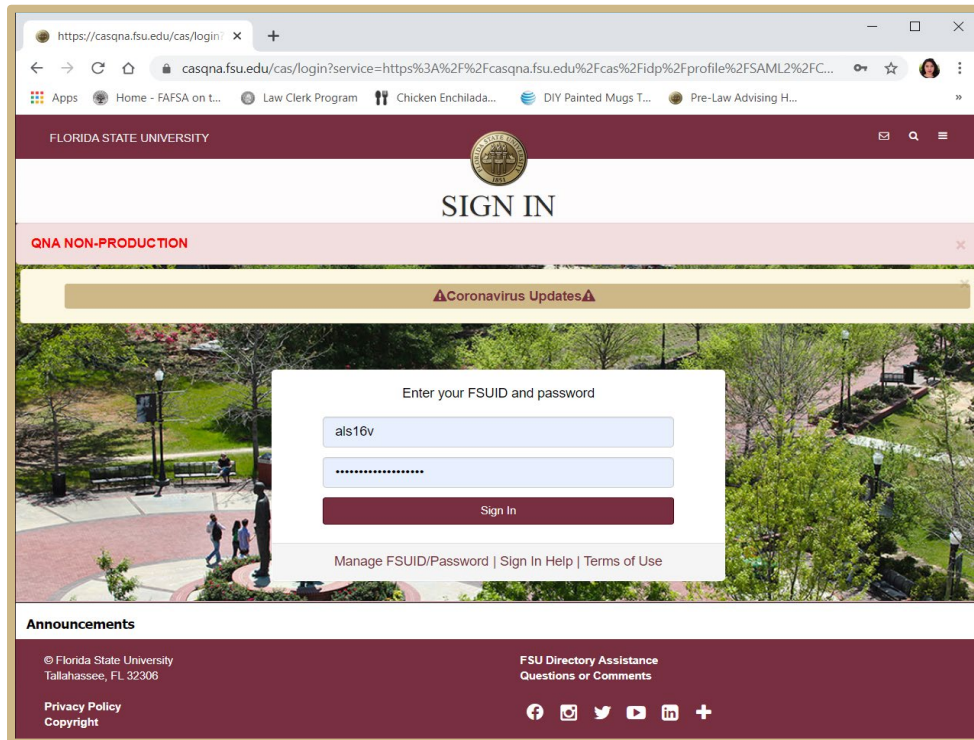
OnBase Web Client

Basic functions

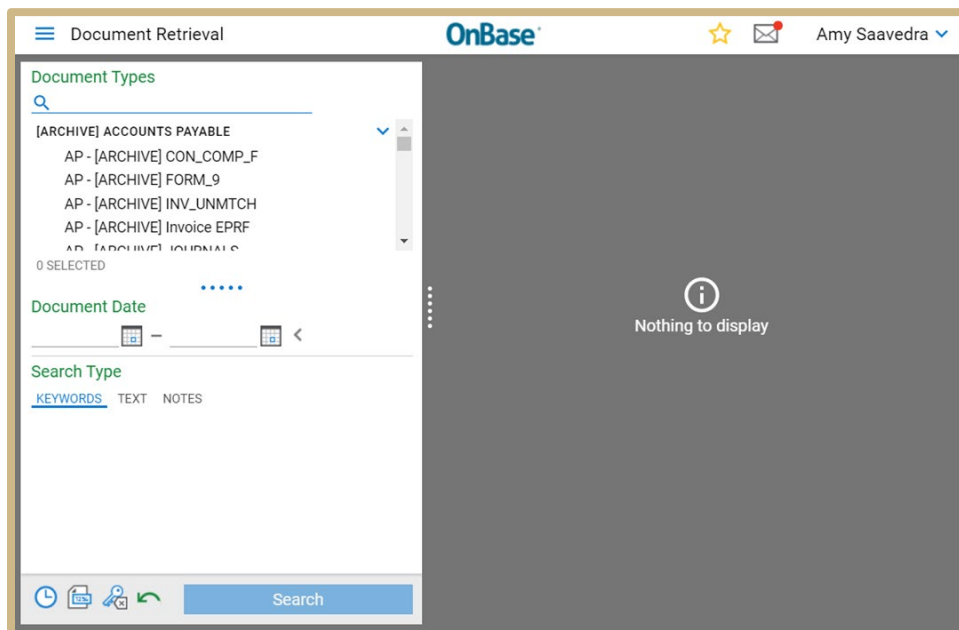


Access

1. To log on to the web client go to <https://floridastate.onbaseonline.com/1800IDP> and log on using your FSU credentials.



Your homepage will look like this once logged in.

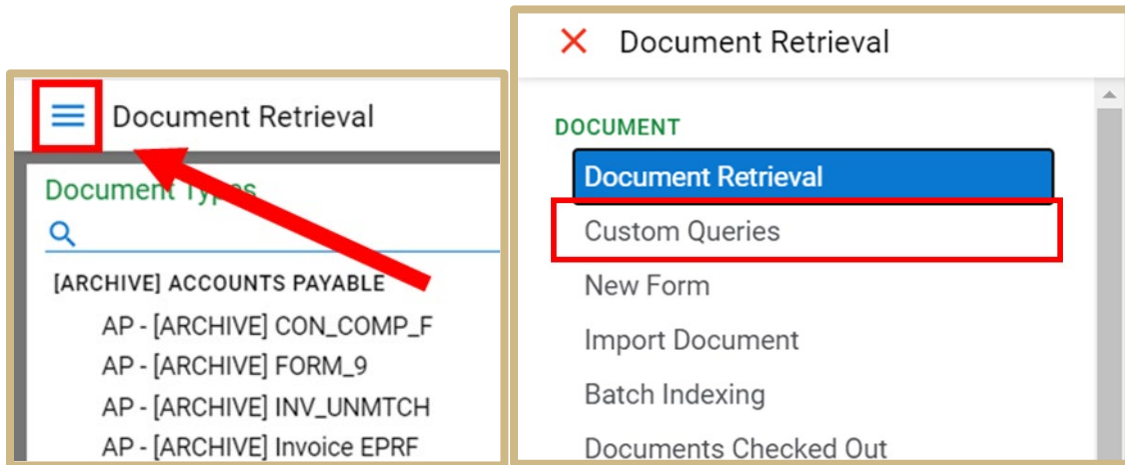


Retrieval

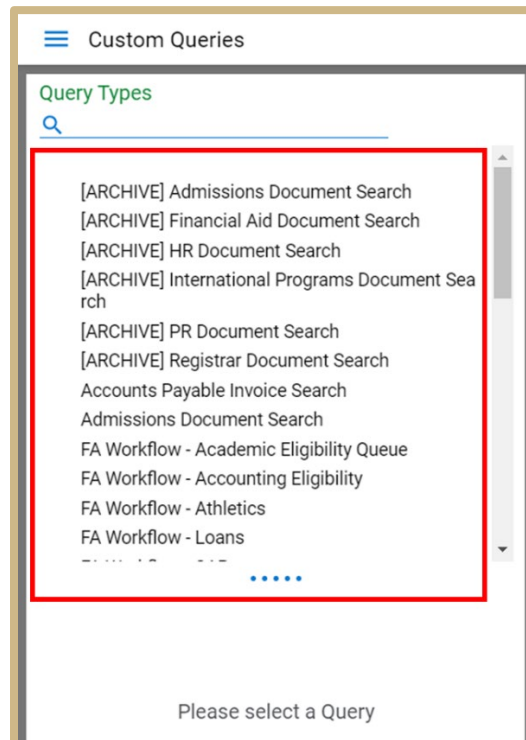
Custom Queries

Custom Queries are pre-built searches that span a search across several different document types for your department. There is no need to select the type of document you want to search by as this has already been programmed in the back end.

1. To use Custom Queries, select the main menu icon at the top left corner then select 'Custom Queries' from the drop down:



2. Once in the Custom Queries menu, select an available Custom Query from the list on the left to search by



3. Once selected, the available search criteria are displayed (below the custom query list) including date options and binary operators. Enter in your search criteria and select "Search" from the bottom

The screenshot displays a search interface with the following sections:

- Query Types:** A list of search options including "HR All Documents Search" (which is selected with a blue checkmark), "Financial Aid All Workflows", "Financial Aid Student Search", "Graduate Studies Document Search", "HR Batch Print to PDF Student Portfolio Search", "HR Disciplinary Documents Search", "International Programs Document Search", and "IP Batch Print to PDF Document Search". A search icon and a "SHOW INSTRUCTIONS" link are also present.
- Document Date:** A date selection area with two calendar icons and a minus sign between them, followed by a left-pointing arrow.
- Search Type:** A section titled "KEYWORDS" containing four search criteria fields, each followed by an equals sign (=):
 - EMPLID: A dropdown menu with the value "000110970" selected.
 - Last Name: An empty text input field.
 - First Name: An empty text input field.
 - SSN: An empty text input field.
- Bottom Bar:** A blue bar containing a clock icon, a key icon, a refresh icon, and a prominent "Search" button.



- The results from the search will be displayed on the right side. Each row represents a document in OnBase. To view a document, double-click on the appropriate row and the document will appear below the result list. (Note: column headers can be clicked on to organize in ascending or descending order, filters are also available)

The screenshot shows the OnBase Custom Queries interface. On the left, there is a sidebar with 'Query Types' and search filters. The 'Document Date' filter is set to a range, and the 'Search Type' is 'KEYWORDS'. The search criteria include 'EMPLID 000110970', 'Last Name', 'First Name', and 'SSN'. A 'Search' button is at the bottom of the sidebar.

The main area, titled 'Custom Query Results', displays a table with the following data:

DOCUMENT TYPE	EFFECTIVE DATE	DOCUMENT DATE	EMPLID
HR - A&P Performance Evaluation	7/2/2020	7/2/2020	000
HR - Acceptance Letter	5/5/2020	5/5/2020	000
HR - Acceptance Letter	6/18/2020	6/2/2020	000
HR - Acceptance Letter	7/2/2020	7/2/2020	000
HR - Additional One Time Pay Form	5/20/2020	5/20/2020	000
HR - Adoption	5/5/2020	5/5/2020	000
HR - Adoption	6/2/2020	6/2/2020	000
HR - Adoption	7/2/2020	7/2/2020	000
HR - Amendment to Employment Contract	6/2/2020	6/2/2020	000

Below the table, it says 'Items: 38'. At the bottom of the main area, there is a message: 'Please Select an Item'.

Once opened, you can perform functions including viewing Keywords, viewing history, adding notes/redactions, etc. (these functions are all limited based on User Group provisioning)

The screenshot shows the OnBase document viewer interface. The document title is 'SHELBY ROBERTS'. The viewer displays a table with the following data:

DOCUMENT TYPE	EFFECTIVE DATE	DOCUMENT DATE	EMPLID
HR - A&P Performance Evaluation	7/2/2020	7/2/2020	000
HR - Acceptance Letter	5/5/2020	5/5/2020	000
HR - Acceptance Letter	6/18/2020	6/2/2020	000
HR - Acceptance Letter	7/2/2020	7/2/2020	000
HR - Additional One Time Pay Form	5/20/2020	5/20/2020	000
HR - Adoption	5/5/2020	5/5/2020	000

Below the table, it says 'Items: 38'. The document content is displayed below the table, showing a table with the following data:

PROFESSIONAL SUMMARY	WORK HISTORY
<p>PROFESSIONAL SUMMARY</p> <p>Experienced educator with proven skills in teaching students across all levels and subjects. Proven classroom organization and ability to create a positive, effective learning environment. Proven ability to differentiate instruction to meet the needs of all learners, with individualized instruction.</p>	<p>WORK HISTORY</p> <p>2008-2017 2018-2020 Teacher Brandon Elementary School Memphis, TN</p> <ul style="list-style-type: none"> Communicated frequently with parents, students and faculty to provide feedback and discuss lesson strategies. Reviewed curriculum and developed effective approaches to presenting lessons to facilitate student understanding. Kept students on task with effective behavior modification and positive reinforcement strategies.

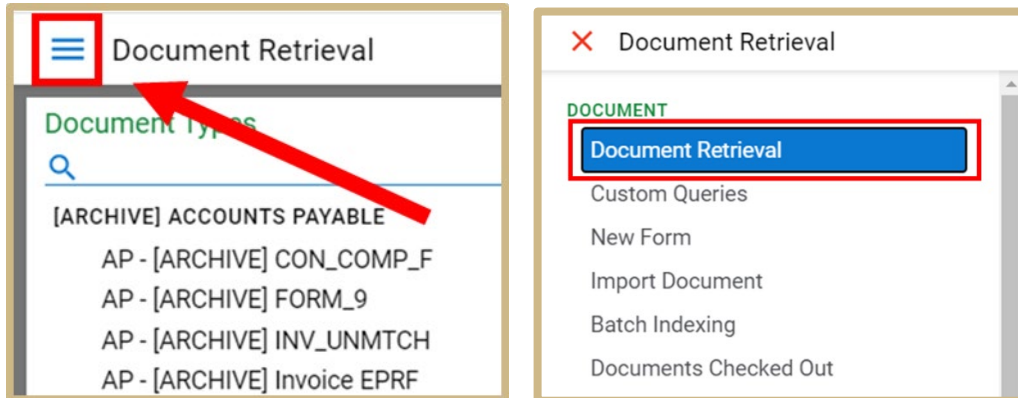
At the bottom of the document viewer, it says 'Page 1 / 1' and '0 Note(s)'.



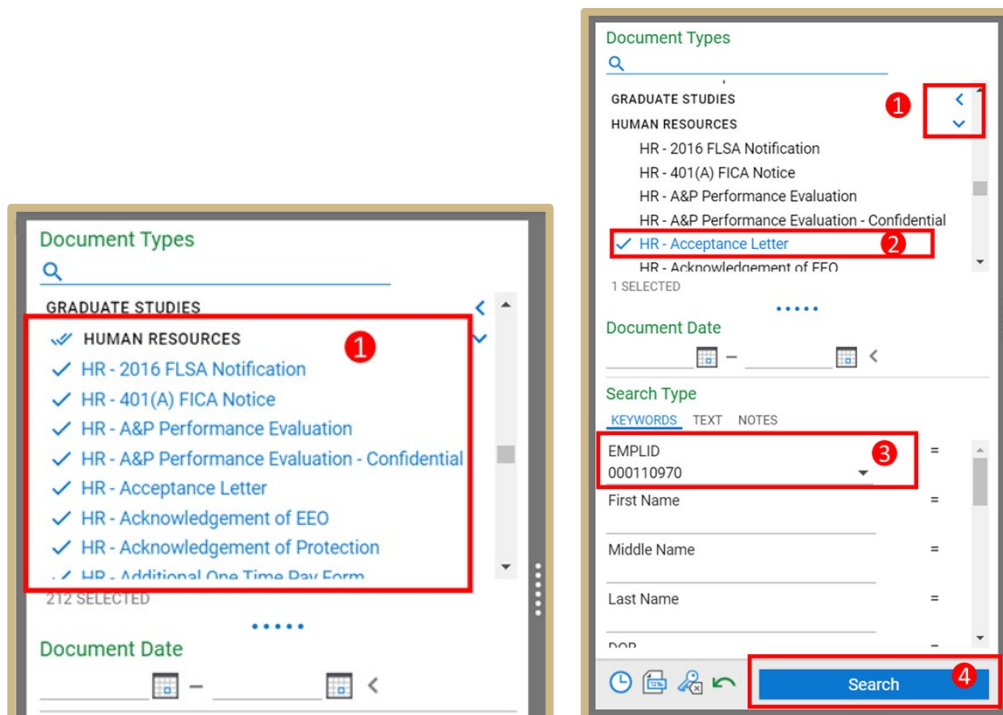
Ad-Hoc Retrieval

Ad-hoc retrieval allows you to see and select the document types you would like to search by.

1. To perform an ad-hoc retrieval, select the main menu icon at the top left corner then select 'Document Retrieval' from the list:



2. In the document retrieval view you can:
 - 1) Select the Document Type Group you want to search by (Note: you can highlight the document type group; you can also select the drop down arrow to view the listing)
 - 2) Select the Document Type you want to search by
 - 3) Enter in your search criteria
 - 4) Select "Search" from the bottom



- Search results will be displayed, with each row representing an individual document. To open the document, double-click on the row (Note: column headers can be clicked on to organize in ascending or descending order, filter are also available)

The screenshot shows the 'Document Search Results' interface. On the left is a sidebar with 'Document Types' (including 'HR - Acceptance Letter' which is selected), 'Document Date' (with a calendar icon), and 'Search Type' (with 'KEYWORDS' selected). Below these are input fields for 'EMPLID' (000110970), 'First Name', and 'Middle Name'. A 'Search' button is at the bottom of the sidebar. The main area shows a table of results with columns 'DOCUMENT NAME' and 'DOCUMENT DATE'. Three results are listed for 'WISMER, LUKAS EMPLID 000110970' with effective dates of 7/2/2020, 6/2/2020, and 5/5/2020. The first result is highlighted. Below the table, it says 'Items: 3' and 'Please Select an Item'.

Once opened, you can perform functions including viewing Keywords, viewing history, adding notes/redactions, etc. (these functions are all limited based on User Group provisioning)

This screenshot shows the same search results interface as above, but with a document preview open. The preview is for 'WISMER, LUKAS EMPLID 000110970 Effective Date 7/2/2020'. The preview content includes a name 'SHELBY ROBERTS', a title 'PROFESSIONAL SUMMARY', and a 'WORK HISTORY' section. The preview is displayed in a window with a toolbar and a 'Page 1 / 1' indicator. The sidebar and search results table are still visible in the background.

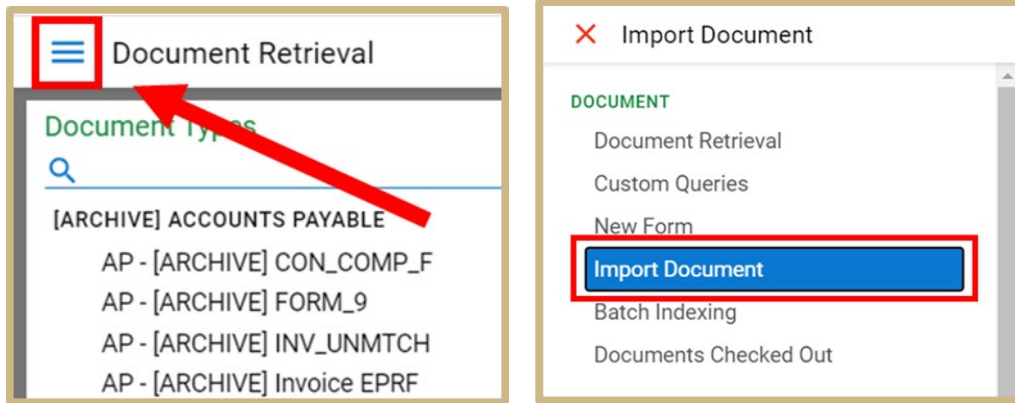


Import

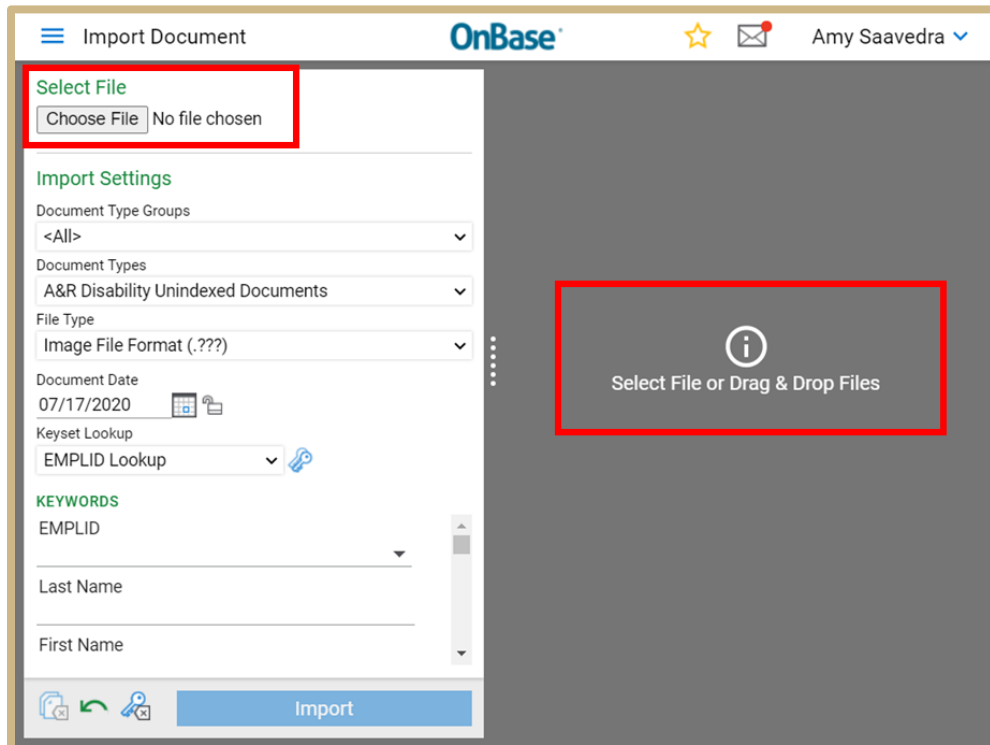
Ad-hoc Import

Ad-hoc import allows you to import a single document.

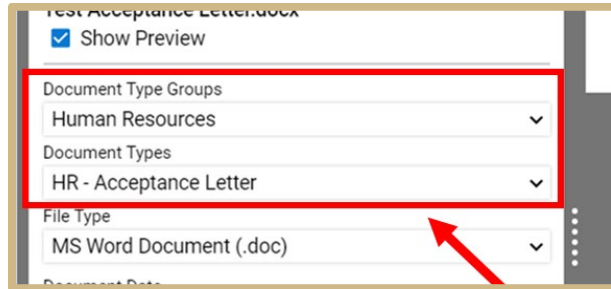
1. To begin, select the main menu icon at the top left corner then select 'Import' from the list



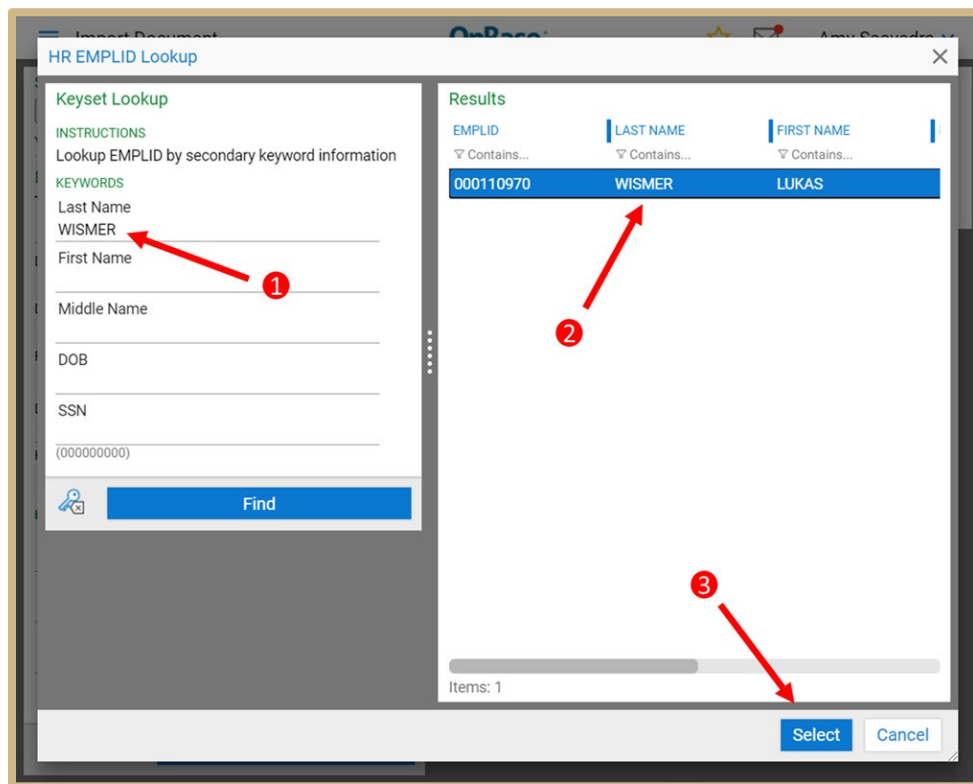
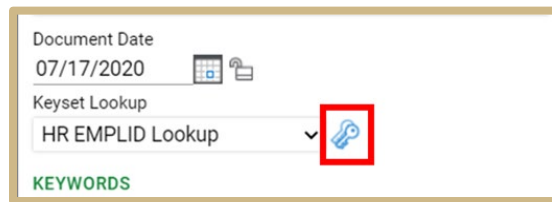
2. The import menu will be displayed where you can begin the import process.
 - 1) Select either 'choose file' (to browse out to a file on your computer) or drag and drop a file from your computer in the gray area.



3. Select the Document Type Group and the Document Type you wish to index this document as



4. A feature called a “Reverse Look-Up” is available to search by student or employee secondary information to find the EMPLID. Select the keys icon to display the Reverse Look-Up screen, which will allow you to enter secondary information to find the record. Search and select the appropriate record and click “Select”.



5. Ensure all required Keywords are satisfied (required Keywords are in red text)

KEYWORDS
EMPLID
000110970
First Name
LUKAS
Middle Name
Last Name
WISMER
Effective Date
07/13/2020
MM/dd/yyyy

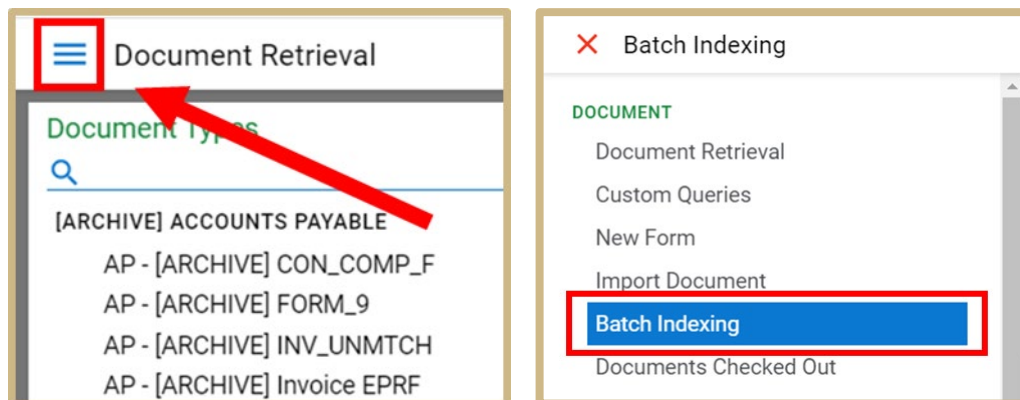
6. Select 'Import' from the bottom to import the document into OnBase



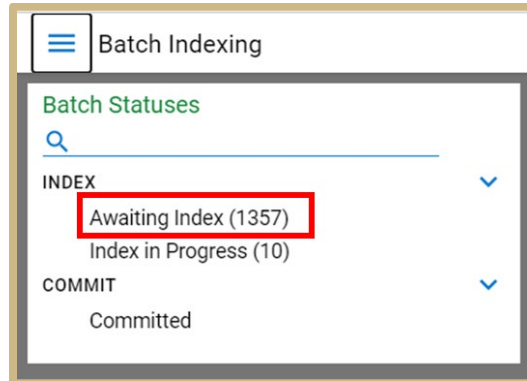
Batch Indexing

Batch Indexing represents the process of indexing documents at a high volume.

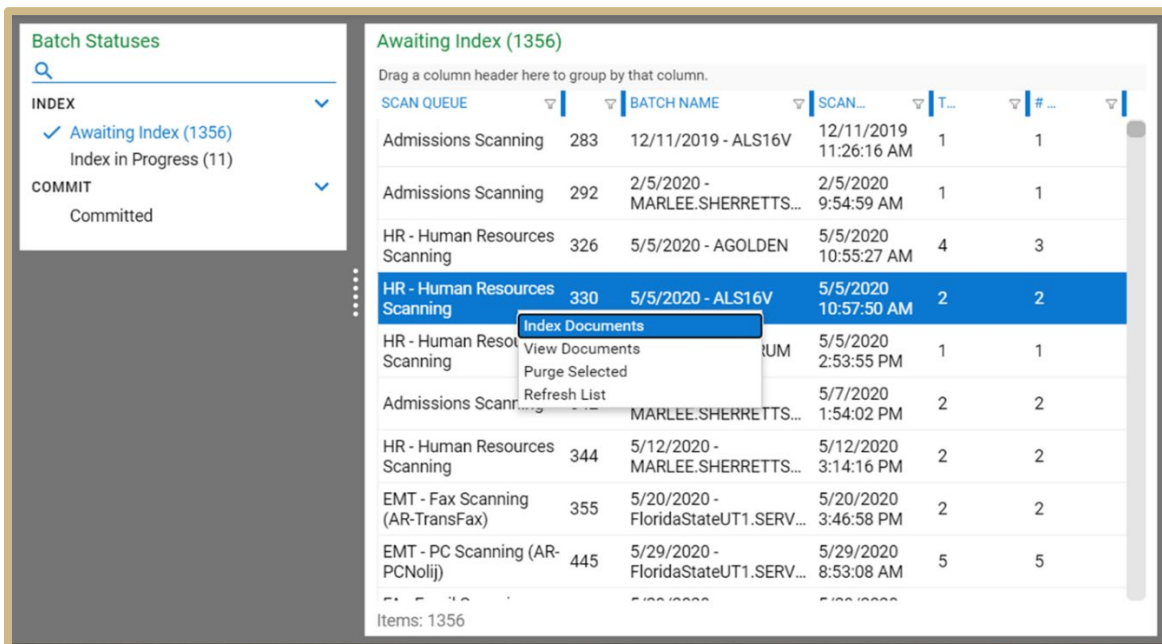
1. To begin, select the main menu icon at the top left corner then select 'Batch indexing'



- The Batch status menu will be displayed, which displays documents waiting to be indexed, documents in indexed progress and, commit. Select 'Awaiting Index'.



- To begin working on a batch of documents, right-click on the batch you want to index and select "Index document". This retrieves the batch and opens the document viewer



Batch Indexing OnBase ★ ✉ Amy Saavedra

Batch # 330 Unindexed Document

Document 1 of 2

DOCUMENT TYPE
 <Select Document Type>

DOCUMENT DATE
 07/21/2020

KEYWORDS
 There are no keywords available for this document type.

a Employee's social security number 123-45-6789	Safe, accurate, FAST! Use OMB No. 1545-0008
b Employer identification number (EIN) 11-2233445	1 Wages, tips, other compensation 48,500.00
c Employer's name, address, and ZIP code The Big Company 123 Main Street Anywhere, PA 12345	3 Social security wages 50,000.00
	5 Medicare wages and tips 50,000.00
	7 Social security tips
d Control number A1B2	9
e Employee's first name and initial Jane A Last name DOE 123 Elm Street Anywhere Else, PA 23456	11 Nonqualified plans
	13 Statutory employee <input type="checkbox"/> Retirement plan <input checked="" type="checkbox"/>
	14 Other

Page 1 / 1 0 Note(s)

- To begin indexing select the document type and specify the document date and if it is different than the default. Make sure all required key word information is filled out (required keywords will be in red).

Batch # 330 ✕

Document 1 of 2

DOCUMENT TYPE
 HR - W-4 Withholding Allowances 📄

DOCUMENT DATE
 07/21/2020 📅 📄

KEYSET LOOKUP
 HR EMPLID Lookup 🔑

KEYWORDS

EMPLID
 000110970 📄

First Name
 LUKAS 📄

Middle Name 📄

Last Name
 WISMER 📄

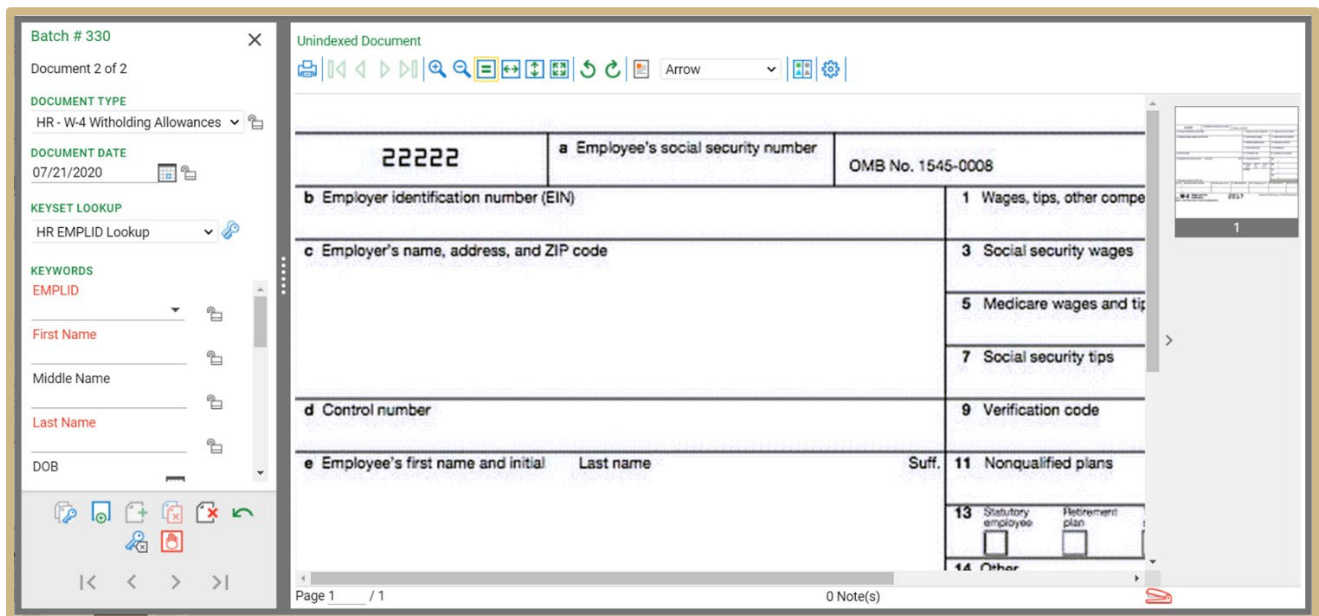
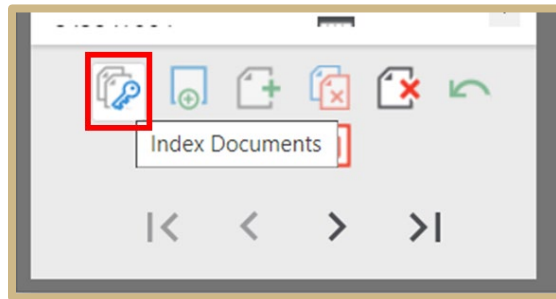
DOB 📄

🔍 📄 📄 📄 📄 📄 📄 📄 📄 📄

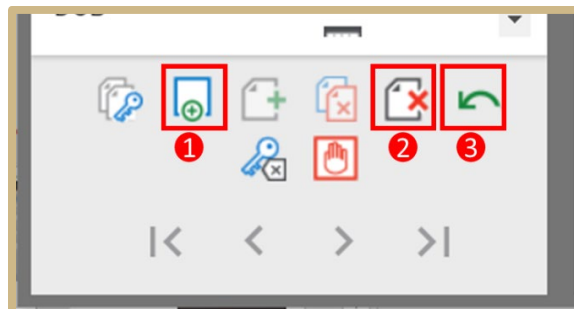
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- Next click the index button to index the document. Once you click index the next document to be indexed in the batch will appear.



- On the bottom left hand side, you will see several icons:
 - Append pages: the next page that shows up was actually a part of the previous page and they needed to be indexed together
 - Delete Document: this deletes a page or a document when clicking this you will be asked if "do you wish to delete the document"
 - Undo: this undoes the previous action you've done



7. Once your batch is completely indexed it will be saved into OnBase via the 'Awaiting Commit' and 'Commit' steps. Ignore batches in these steps, these are automated steps working to save these batches into OnBase.
8. You are now complete with indexing your batch and brought back to the Batch Indexing screen where you can continue indexing other batches of documents.

Note: Batch scanning is not supported on the web client



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