Florida State University

OnBase
by Hyland

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.
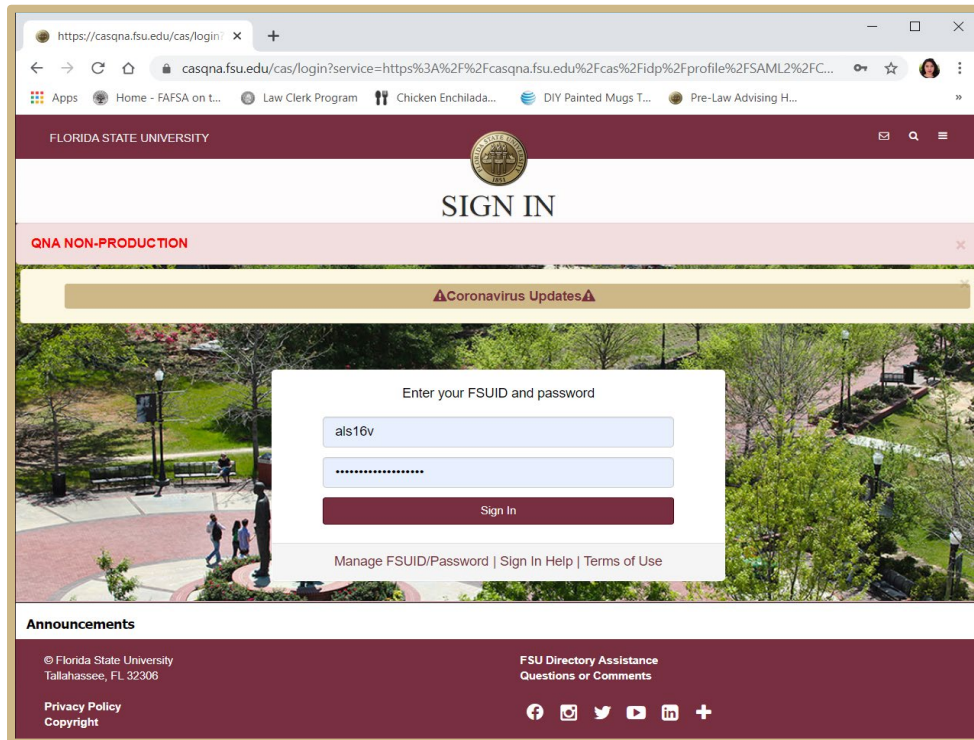
Your homepage will look like this once logged in.
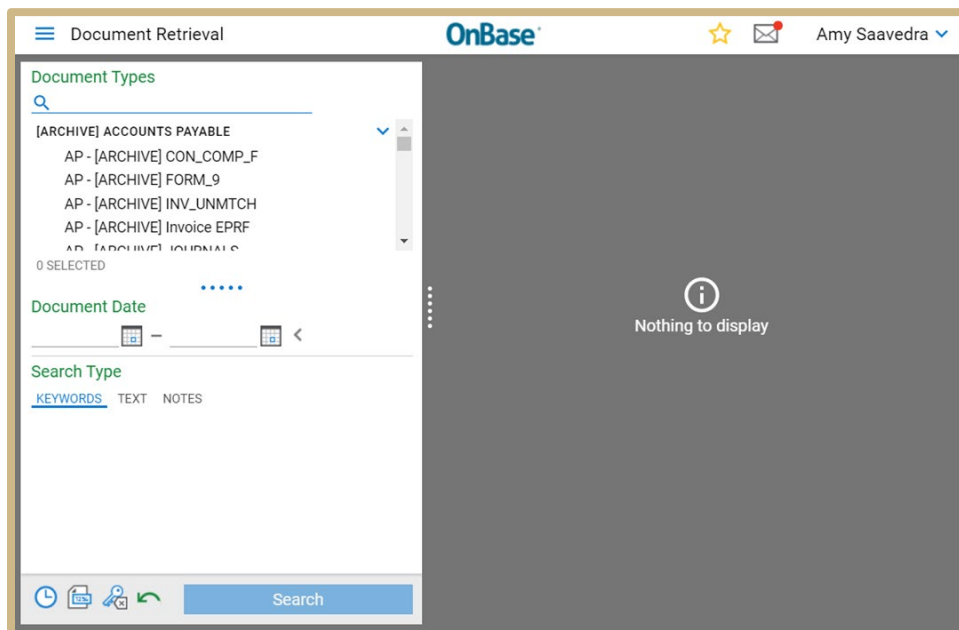
Retrieval

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:
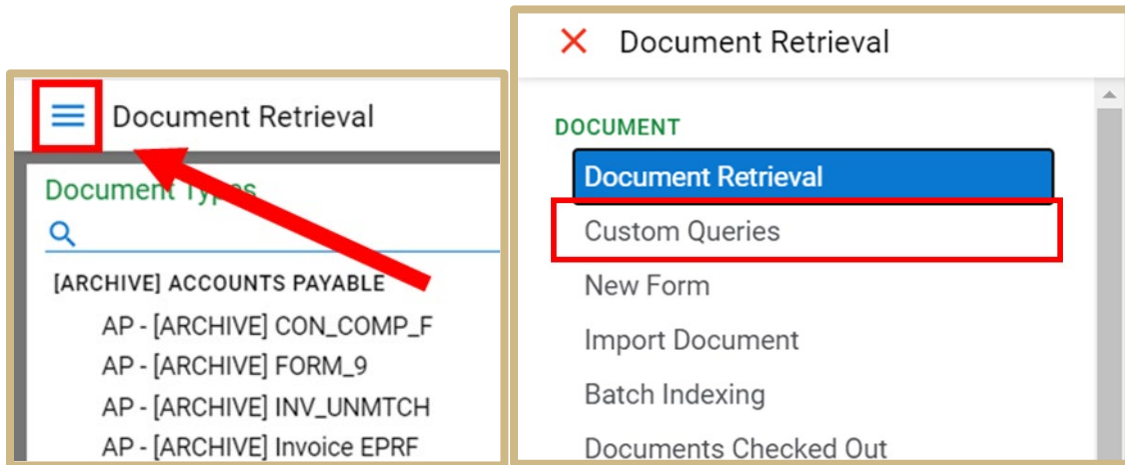
2. Once in the Custom Queries menu, select an available Custom Query from the list on the left to search by
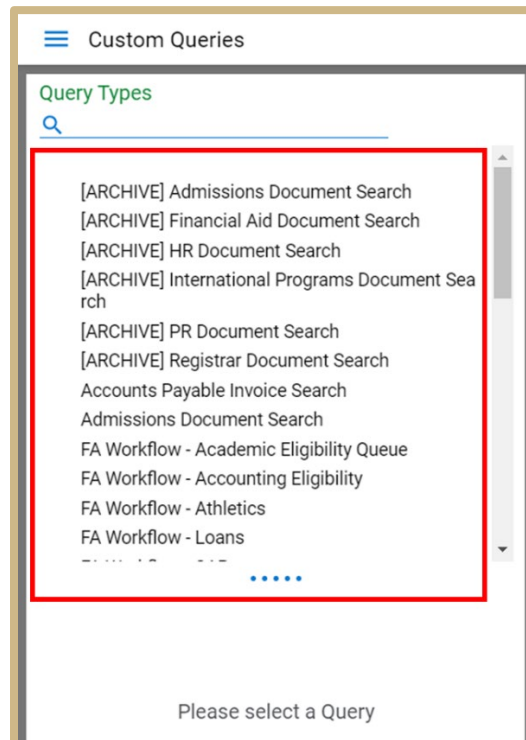
3. Once selected, the available search criteria are displayed (below the custom query list) including date options and binary operators. Enter in your search criteria and select "Search" from the bottom

4. 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)

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)

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:
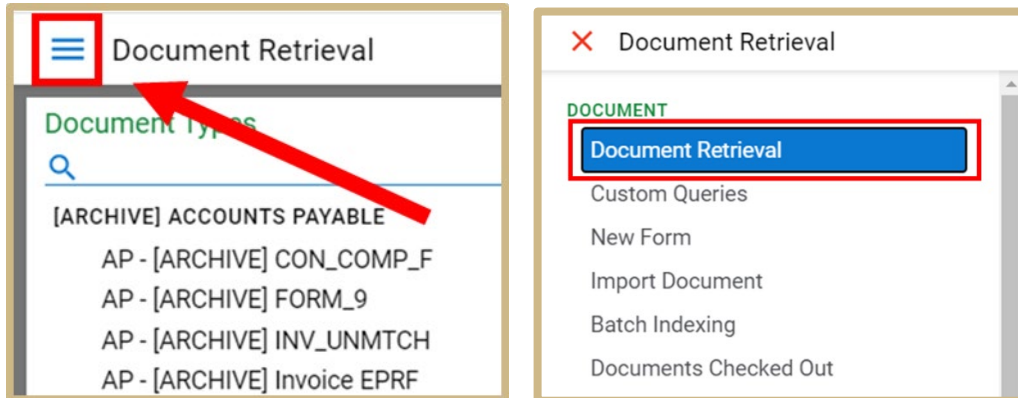
2. In the document retrieval view you can:
   1) Select the Document Type Group you want to search by (Note: you can highlight the document type group; you can also select the drop down arrow to view the listing)
   2) Select the Document Type you want to search by
   3) Enter in your search criteria
   4) Select "Search" from the bottom
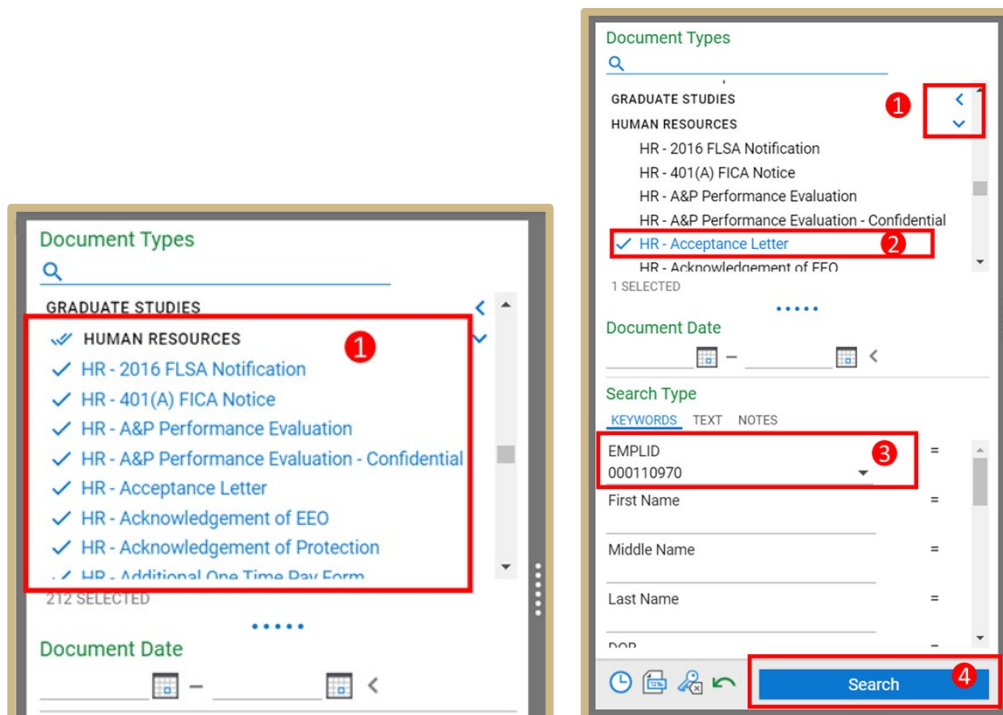
3. Search results will be displayed, with each row representing an individual document. To open the document, double-click on the row (Note: column headers can be clicked on to organize in ascending or descending order, filter are also available)

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)

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
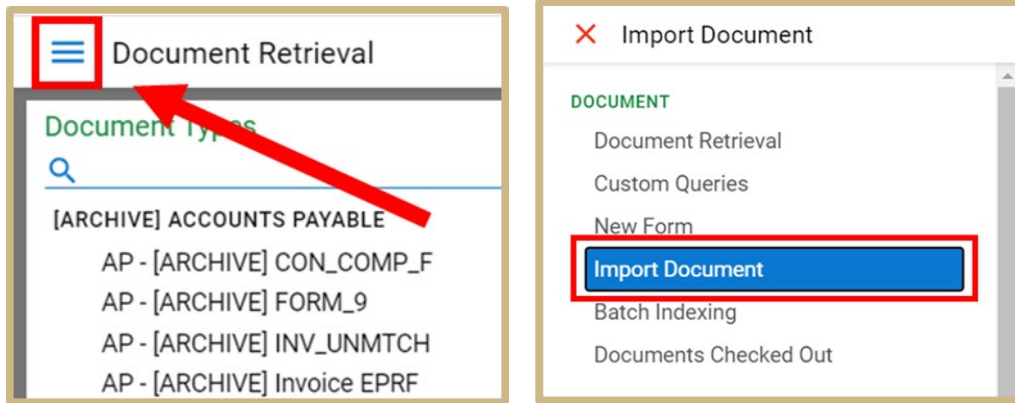
2. The import menu will be displayed where you can begin the import process.
   1) Select either 'choose file' (to browse out to a file on your computer) or drag and drop a file from your computer in the gray area.
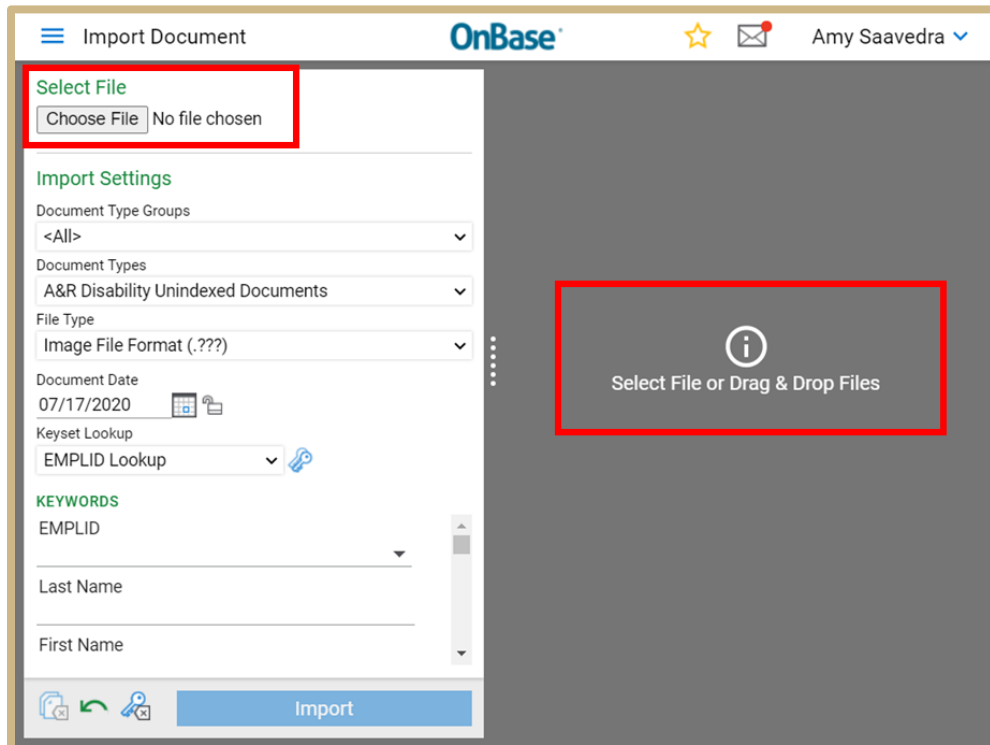
3. Select the Document Type Group and the Document Type you wish to index this document as
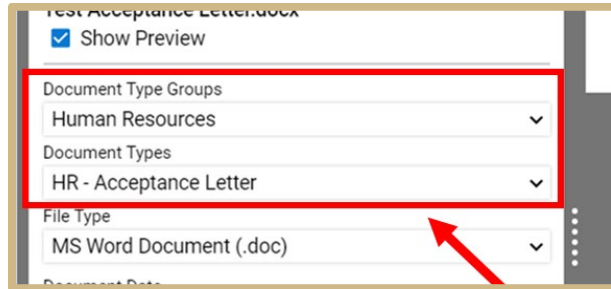
4. A feature called a "Reverse Look-Up" is available to search by student or employee secondary information to find the EMPLID. Select the keys icon to display the Reverse Look-Up screen, which will allow you to enter secondary information to find the record. Search and select the appropriate record and click "Select".
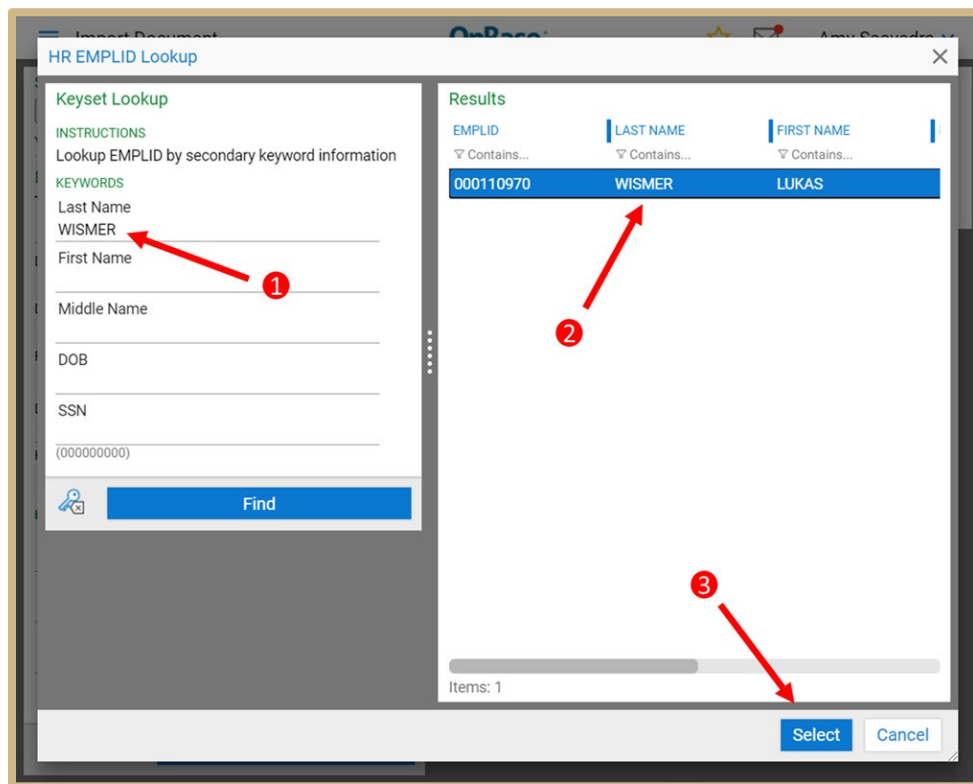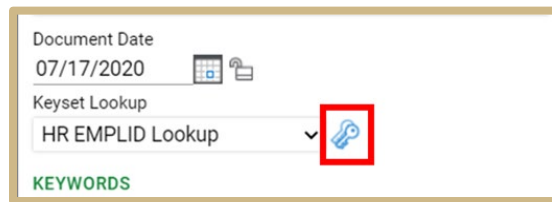
5. Ensure all required Keywords are satisfied (required Keywords are in red text)

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

Import

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'

Document Retrieval

Document Types

[ARCHIVE] ACCOUNTS PAYABLE
    AP - [ARCHIVE] CON_COMP_F
    AP - [ARCHIVE] FORM_9
    AP - [ARCHIVE] INV_UNMTCH
    AP - [ARCHIVE] Invoice EPRF

X   Batch Indexing

DOCUMENT
    Document Retrieval
    Custom Queries
    New Form
    Import Document
    Batch Indexing
    Documents Checked Out
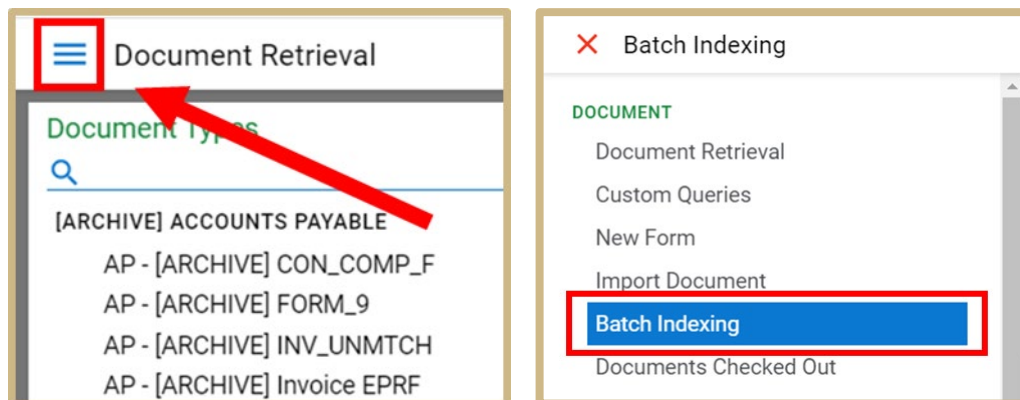
2. The Batch status menu will be displayed, which displays documents waiting to be indexed, documents in indexed progress and, commit. Select 'Awaiting Index'.
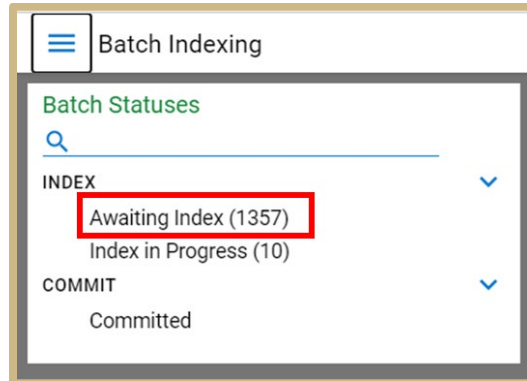
3. To begin working on a batch of documents, right-click on the batch you want to index and select "Index document". This retrieves the batch and opens the document viewer

4. 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).

5. Next click the index button to index the document. Once you click index the next document to be indexed in the batch will appear.
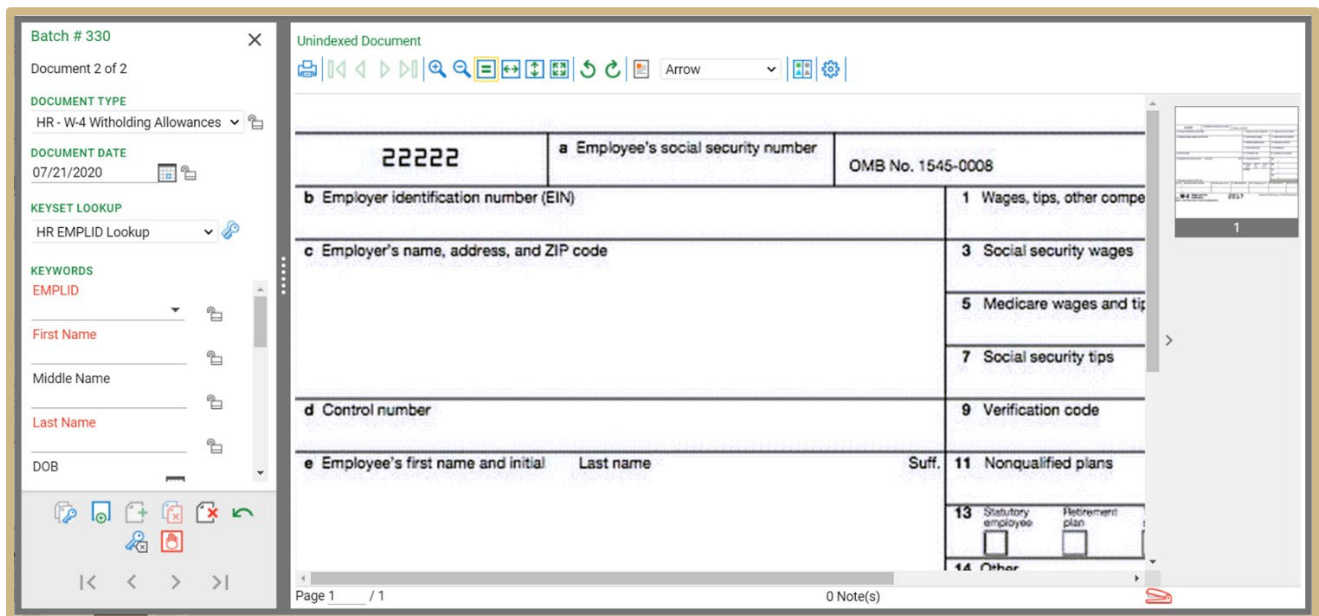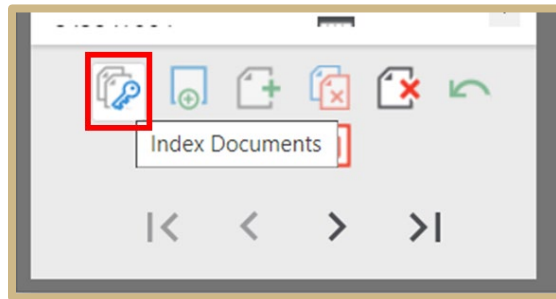
6. On the bottom left hand side, you will see several icons:
   1) Append pages: the next page that shows up was actually a part of the previous page and they needed to be indexed together
   2) Delete Document: this deletes a page or a document when clicking this you will be asked if "do you wish to delete the document"
   3) Undo: this undoes the previous action you've done
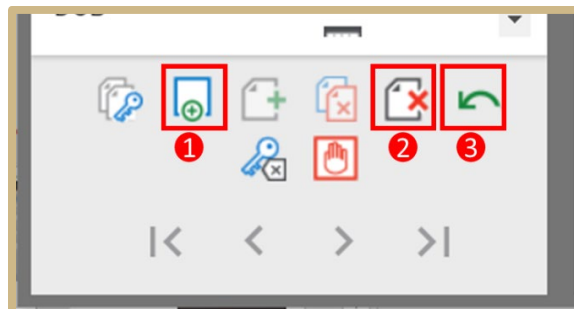
7. Once your batch is completely indexed it will be saved into OnBase via the 'Awaiting Commit' and 'Commit' steps. Ignore batches in these steps, these are automated steps working to save these batches into OnBase.

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

<u>Contact Us</u>

Enterprise Document Management Team

Business Application Services – EDM
Information Technology Services
Florida State University
ITS-EDM@fsu.edu

Darla Shrum – Assistant Director
Allison Golden – ERP Analyst II