

OnBase[®]

a Hyland Software solution

OnBase Quick Reference Guide

Scanning and Indexing

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1. Introduction

1.1. Vocabulary

The following vocabulary words will be used throughout this document. Your instructor will review them with you, and there is space for you to make notes if necessary.

Document	
Document Type	
Keyword Type	
Autofill	
Import	
Scan	
Index	
Scan Queue	
Scan Format	
Page	
Commit	
Purge	

2. Starting OnBase

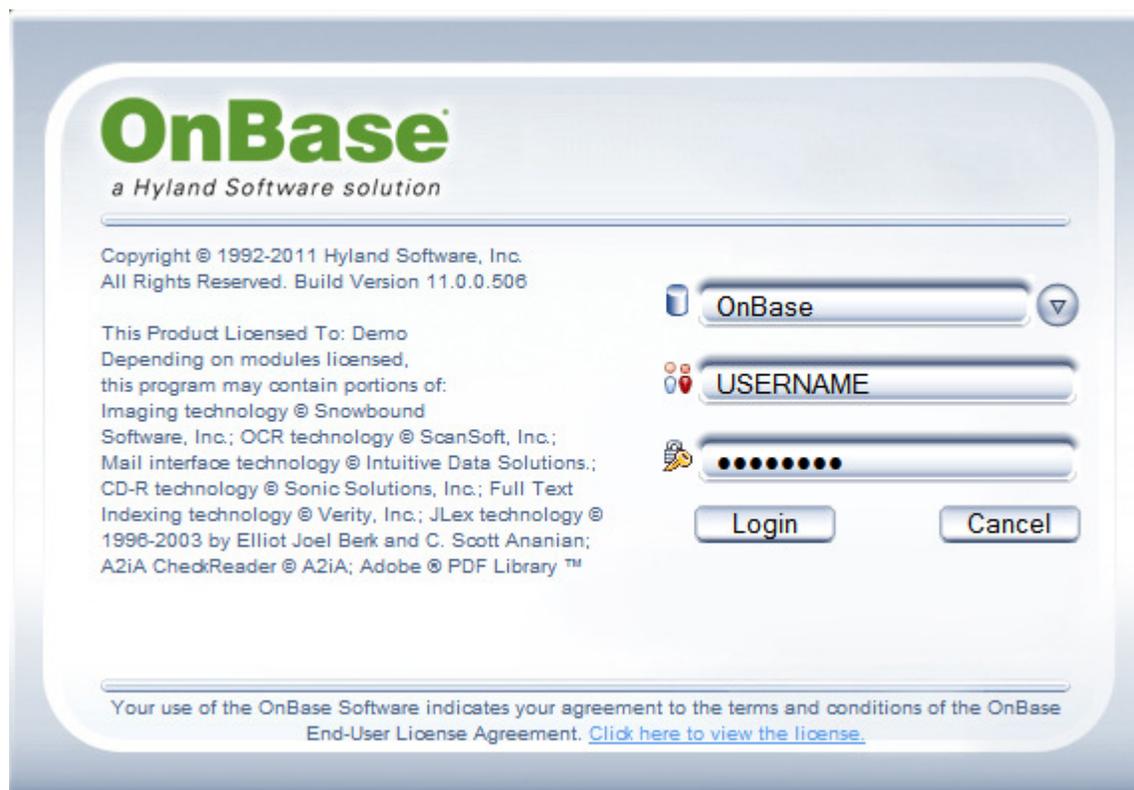
To login to the OnBase client:

.....
Double-click the OnBase icon on your desktop.



NOTE: This links you directly to the database and it may take several minutes. Do not double-click the icon again as doing so will only delay your access to OnBase.

.....
Enter your Username and Password. If you do not know these values, see your System Administrator.

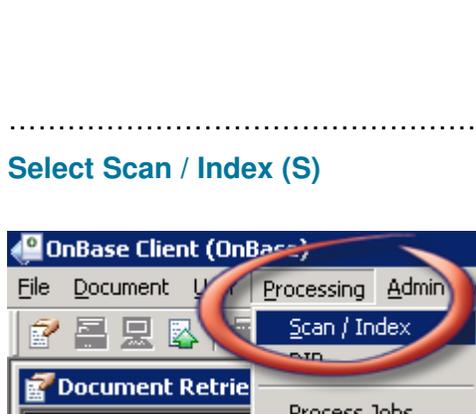


.....
Click Login (or press the **Enter** key) to continue.

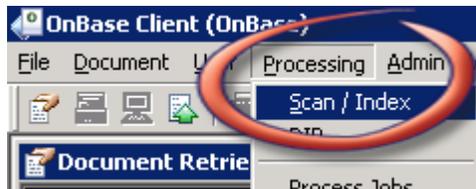
3. Document Imaging

The **Document Imaging** window is the central point through which images are brought into the system.

Select **Processing (Alt P)** from the menu bar



Select **Scan / Index (S)**

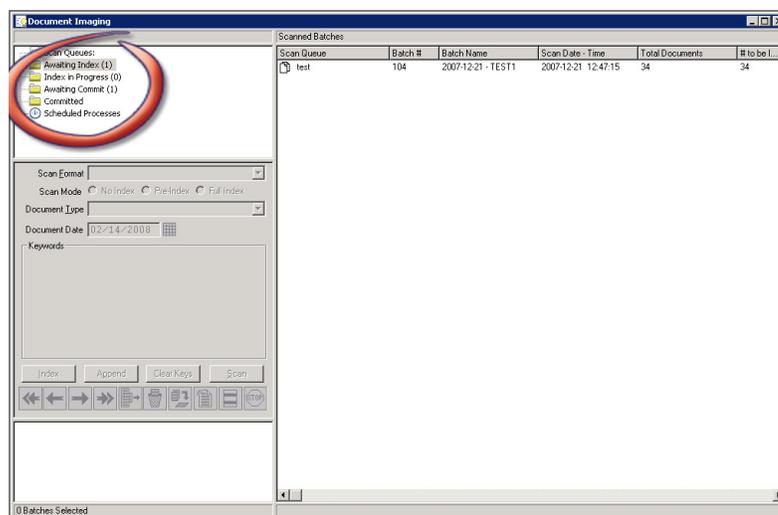


The **Document Imaging** window will be displayed.

3.1. Scanning

3.1.1. Batch Status Queues

The upper left-hand corner of the **Document Imaging** window is where the **Batch Status Queues** are located. These queues allow you to follow the progress of scanned pages. The first choice, **Scan Queues**, is the only entry that is not a batch status queue. This queue lists all the available scan queues. Double-click on a scan queue to see the batches. Each batch status queue has a number in parentheses after the name of the process folder. This is the number of scanned batches that are in that process folder.



3.1.2. Scan Modes

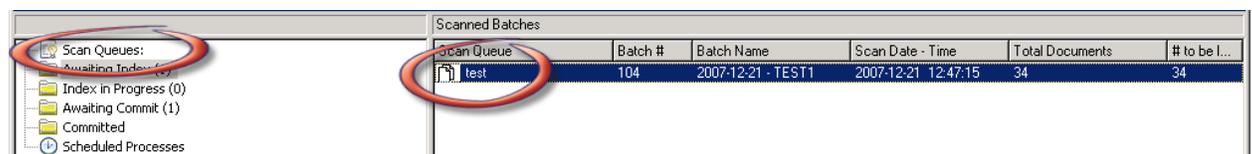
Option	Description
No Index	Select to perform manual indexing after documents have been scanned into the system. This option cannot be used if barcodes are to be read from the documents that are being scanned.
Pre-Index	Activates the Document Type dropdown list allowing a user to specify the Document Type of the scanned or imported documents. This option also allows the entry of keyword values. When scanning is completed the newly acquired documents are sent to Awaiting Index to be completed or reviewed.
Full Index	Differs from pre-indexing by skipping the Awaiting Index queue. Activates the Document Type dropdown list allowing you to specify the Document Type of the scanned or imported documents. This option also allows you to enter keyword values. Choose Full Index when using bar codes or when AutoFill Keyword Sets are used to automate the indexing process.

3.1.3. Scan Formats

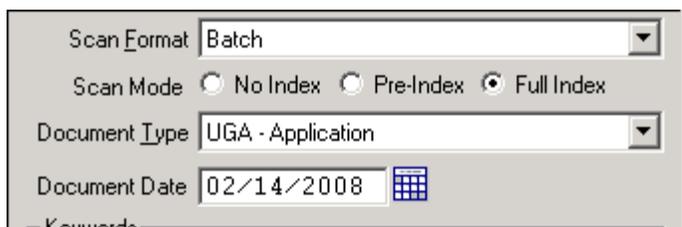
By having multiple **Scan Formats** created for the same scanner with different parameters, such as different paper sizes; you can easily switch from scanning one type of document to scanning another type of document without having to reset all the parameters for the scanner.

3.1.4. The Scanning Process

Double-click on a Scan Queue on the right side of the screen. A scan queue must be selected to determine the type of **Scan Format** to be used.



Select a Scan Format from the dropdown list. Pick the one that suits the documents you are scanning.

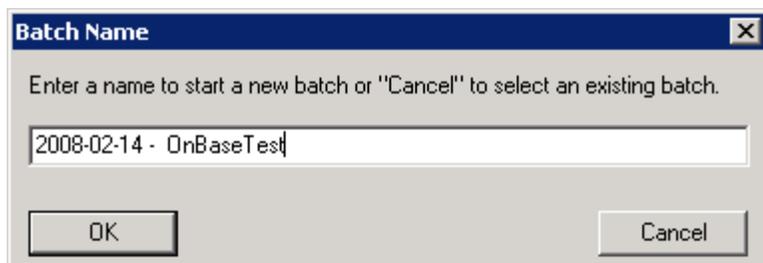


Select the **No Index Scan Mode** for Batch Scanning. Always verify the Scan Format before scanning.

Load documents into the scanner

Click Scan

The **Batch Name** dialog box will be displayed.



Enter a batch name. All new batches should be named with the type of documents that they contain to assist in finding the appropriate batches to process at a later date.

Click OK. The scanner will begin scanning. You will be able to see each page in the viewer as they are scanned.

NOTE: All other OnBase functions will be inoperable while the scanner is processing.

3.2. Indexing

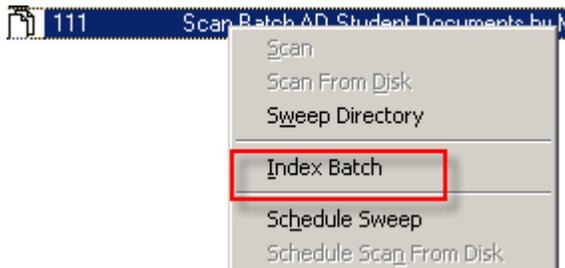
Indexing is performed once the scanning process is complete. OnBase will place the documents in the **Awaiting Index** queue where the batch will wait to be indexed and, optionally, committed. Indexing associates **Keyword** and **Document Type** information with scanned documents.

3.2.1. The Indexing Process

Single-click on Awaiting Index. Your scanned images will have information about them, such as, which Scan Queue they were scanned into, the Batch #, Batch name, Scan Date – Time, and how many pages to be indexed.

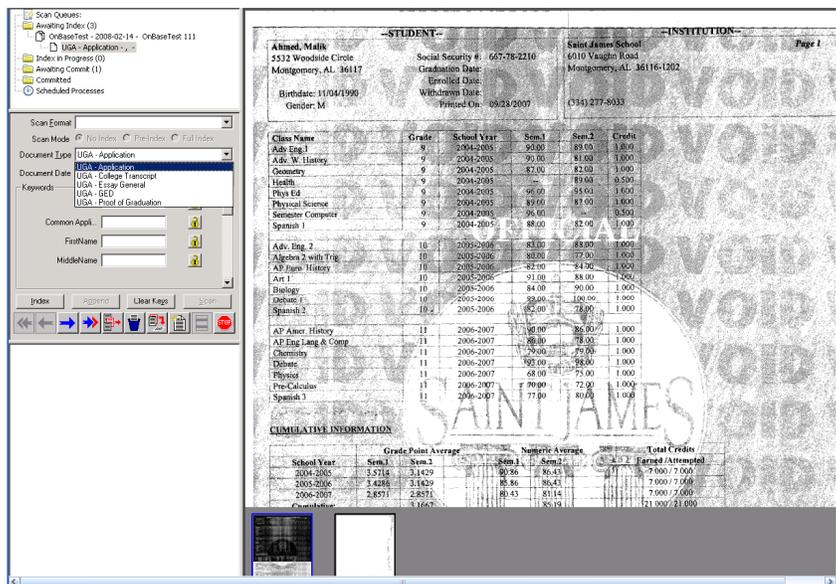
Single-click on the batch you wish to index.

Right-click the batch to bring up the indexing menu.



Select Index Documents. The Document Imaging sub-window becomes enabled.

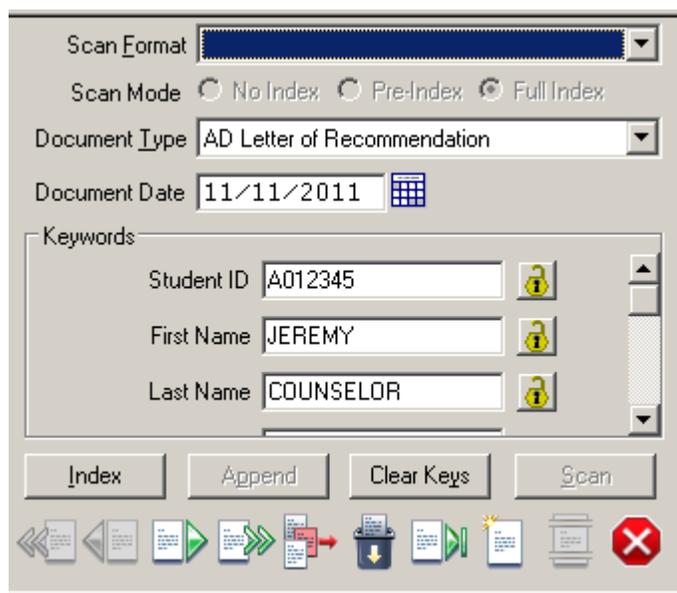
Select a Document Type from the dropdown menu at the left.



Enter any required keywords (displayed in red) for the displayed document.

Enter other keyword values (as many as possible).

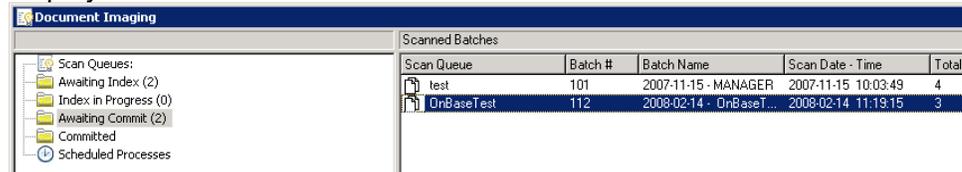
Click the **Index (Alt I)** button to index the document.



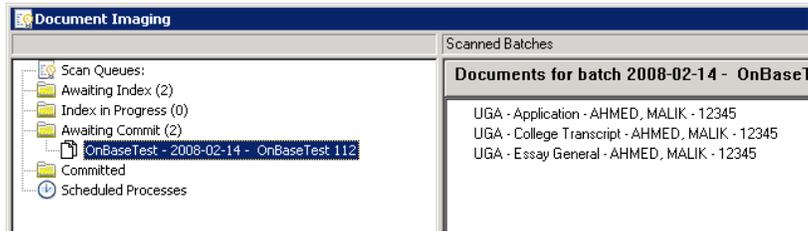
3.2.2. Committing Batches

Once fully indexed, the documents are placed in the **Awaiting Commit** queue waiting to be committed. Once you commit a batch you cannot make changes to it. Committing creates a permanent copy of your documents.

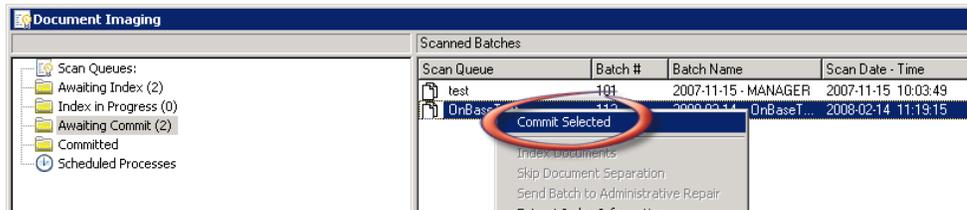
Single-click the **Awaiting Commit** queue. The batches to be committed will be displayed.



Double-click each batch to view its documents. This is a good step to review the documents prior to committing them. If any documents are indexed incorrectly they can be **Re-Indexed** to the proper Document Type or the **Send To** option can be used to split documents that were appended in error. See Section 4 on how to correct any errors.



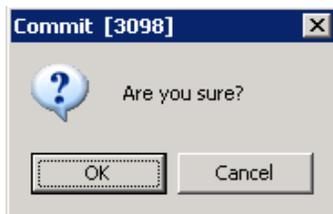
Single-click and highlight the batch(es) to be committed on the right side of the screen.



Right-click the batch(es) to be committed

Select Commit Selected from the batch menu

Click **OK** to verify that this is what you want to do



OnBase will commit the selected documents and the batch is now in the **Committed** queue.

4. Fixing Mistakes

4.1. Purging Batches

Purging a batch deletes all documents from the batch (indexed and un-indexed documents). (The **Purge** function is controlled by security. If you do not have the proper rights, the Purging option will be greyed out.)

Select **P**rocessing (ALT P) from the menu bar.

.....

Select Scan/Index (S).

.....

Double-click on the **Queue**, on the left side of the screen, that contains the batch you are deleting. (Batches can only be deleted from the **Awaiting Index**, **Index in Progress**, or **Awaiting Commit** queues.)



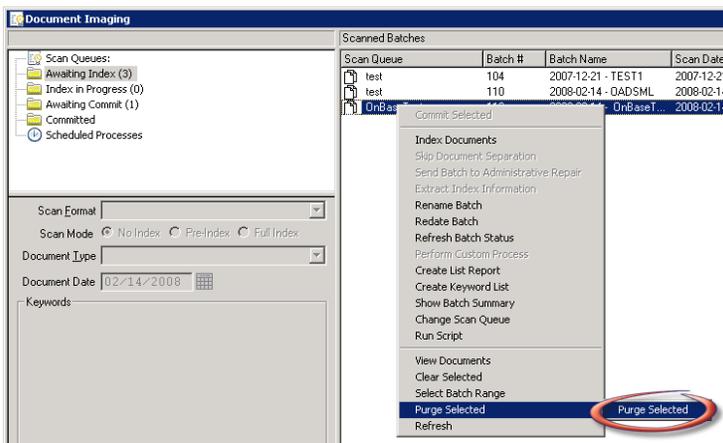
Single-click on the **batch** you want to purge to select it.

.....

Right-click on the **batch** to bring up the shortcut menu

.....

Select **Purge Selected**



Select **OK** when the **Purge** and the **Confirm** dialog boxes are displayed.



The purged batch is now removed from OnBase completely.

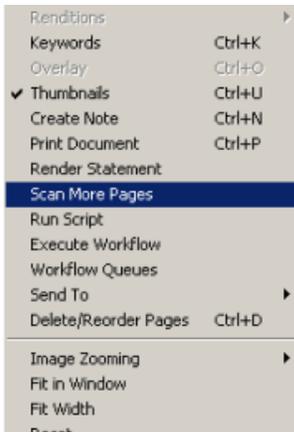
4.2. Adding Pages to a Document

The **Scan More Pages** option can be used to add page(s) to an existing document. To use Scan More Pages, follow these steps:

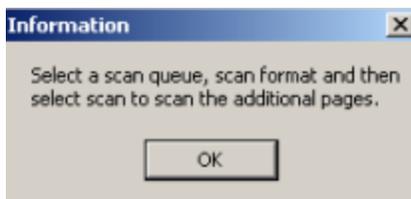
Retrieve and open the document you wish to add the page(s) to.

Right-click on the opened image

Select **Scan More Pages** from the right-click menu. **Note:** The image must be open to use this option.



Click **OK** when the system prompts you to choose the appropriate scan queue.



Place the page(s) in the scanner

.....

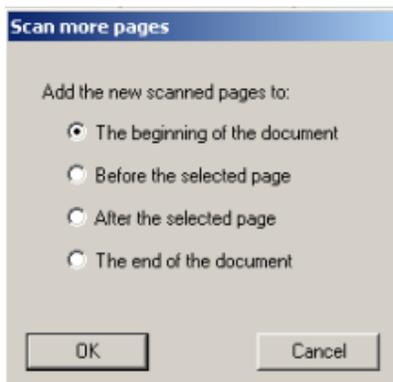
Select the appropriate scan queue

.....

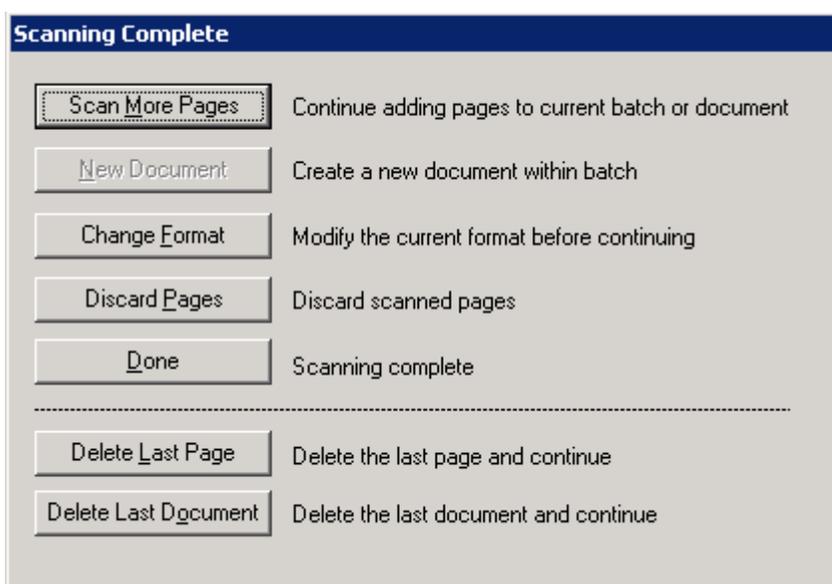
Click the Scan button

.....

Choose where you want the page to be placed in the original document from the **Scan more pages dialog**



Select **Done** when scanning is complete.



.....
The page(s) have now been added to the existing document.

4.3. Separating Pages from a Document

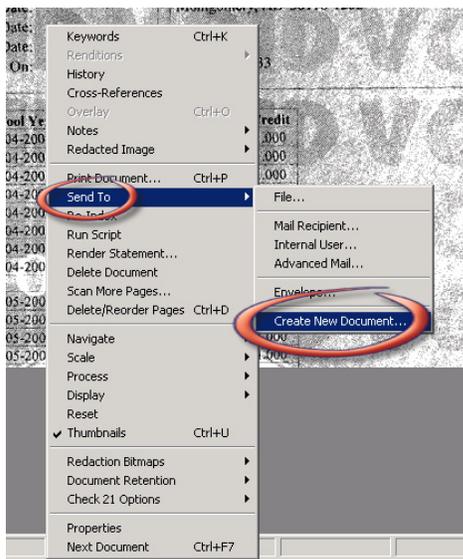
The **Send To** option can be used to correct documents that have been inadvertently combined into one document. Follow the steps below to use **Send To for error correction**.

.....
Retrieve an open the document you wish to error correct.

.....
Right-click on the opened image

.....
Select Send To from the right-click menu. (The image must be open to use this option)

.....
Select Create New Document



.....
Select a new Document Type for the pages you wish to remove from the original document from the **Document Type** dropdown on the **Create new document from existing window**

Create new document from existing

Document type
UGA - Application

Create from pages
1-8

Enter page numbers and/or page ranges, separated by commas.
For example: 1,3,5-12

Document Date
02/14/2008

Delete copied pages from original document
 Original document will be modified to reflect deleted pages

Keywords

UID: 12345
Common Application ID: BU12345
FirstName: MALIK
MiddleName:
LastName: AHMED

OK Clear Keywords Cancel

Enter the page number(s), of the page(s) you wish to move to the new document.

Example 1: The first four pages of the image need to be moved:

Create new document from existing

Document type
UGA - Application

Create from pages
1-4

Enter page numbers and/or page ranges, separated by commas.
For example: 1,3,5-12

Document Date
02/14/2008

Delete copied pages from original document
 Original document will be modified to reflect deleted pages

Keywords

UID: 12345
Common Application ID: BU12345
FirstName: MALIK
MiddleName:
LastName: AHMED

OK Clear Keywords Cancel

Example 2: The first three pages & pages 5-9 of the image need to be moved:

Create new document from existing

Document type
UGA - Application

Create from pages
1-3,5-9

Enter page numbers and/or page ranges, separated by commas.
For example: 1,3,5-12

Document Date
02/14/2008

Delete copied pages from original document
 Original document will be modified to reflect deleted pages

Keywords

UID: 12345
Common Application ID: BU12345
FirstName: MALIK
MiddleName:
LastName: AHMED

OK Clear Keywords Cancel

(optional) Update Keyword values

.....

(optional) Check the Delete copied pages from original document checkbox. The system will remove the specified pages from their original location and create a new document based upon the Document Type that was selected.

.....

Click OK

4.4. Deleting and Reordering Pages

4.4.1. The Delete/Reorder Pages Interface

	Save Changes and Close – Allows you to save all changes to the document and closes the image.
	Cancel Changes – Restores document back to its original settings.
	Delete All – Allows you to mark all pages for deletion.
	Undelete All – Allows you to unselect all pages marked for deletion.
	Delete Selected – Allows you the delete the pages marked for deletion.
	Select All – Allows the user to select all pages within the document.
	Rotate Selected Page – Allows you to rotate the selected page 90 degrees.
	Set thumbnail Size – Allows you to change the size of the thumbnails in the Delete/Reorder Page viewer.

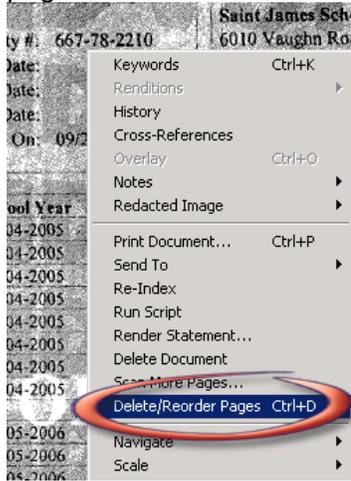
4.4.2. The Delete/Reorder Pages Process

Open the document that contains pages you wish to delete

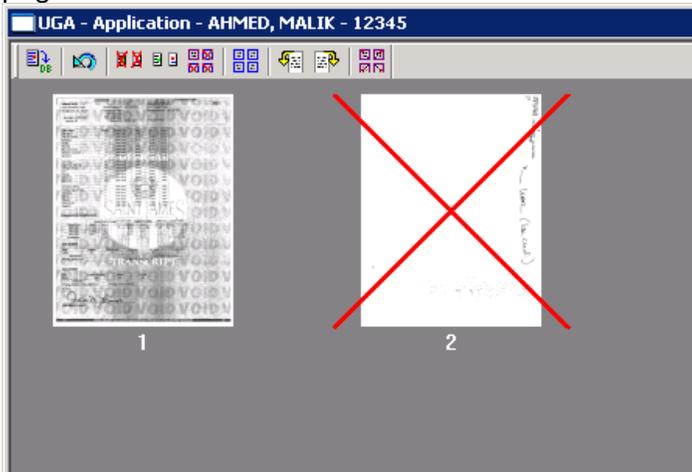
.....
Right-click on the document to bring up the right-click menu

.....

Select **Delete/Reorder Pages** and the document will be displayed for you in page-by-page view.



Double-click on the page(s) you wish to delete. A red X will be placed over those pages once selected.



Click **Save Changes** to delete the selected pages.

4.5. Combining Documents

It is possible to move pages from one document to another, effectively combining the two documents together. We can then delete the original document if necessary.

Retrieve the documents you wish to combine.

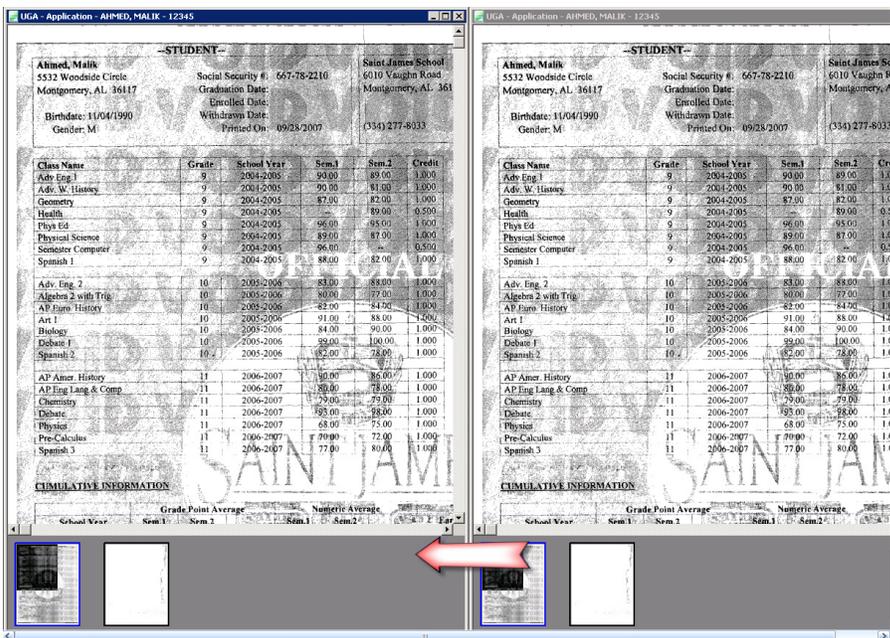


Double-click on each document to open it, or right-click and select **View Selected**. Click on the **Tile** icon to make it easier to move the thumbnails



Right-click on the thumbnail you want to move.

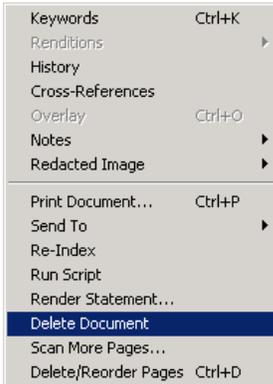
Right-drag the thumbnail onto the new document. (Hold the right mouse button down and drag it in to the desired essays document.) **Example:** A two page essay that has been indexed as two separate essays. **NOTE:** You can only move one page (*thumbnail*) at a time.



If the document you are removing the page from only has one page, the system will not automatically delete it. After the page is moved into the new document you will have to delete it manually.

(optional) Right-click on the old document that the page was removed from.

(optional) Select **Delete Document** to get rid of it.



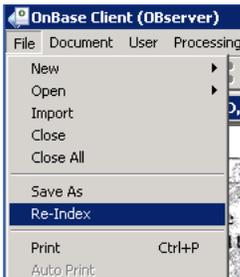
4.6. Changing Document Type and Keyword Values

Re-indexing allows you to change the **Document Type** of the current document and enter new **Keyword Values**. When you re-index a document, the document is removed from the existing Document Type and stored as the new Document Type.

.....
Open the document you would like to re-index.

.....
Select File (Alt F) from the menu bar

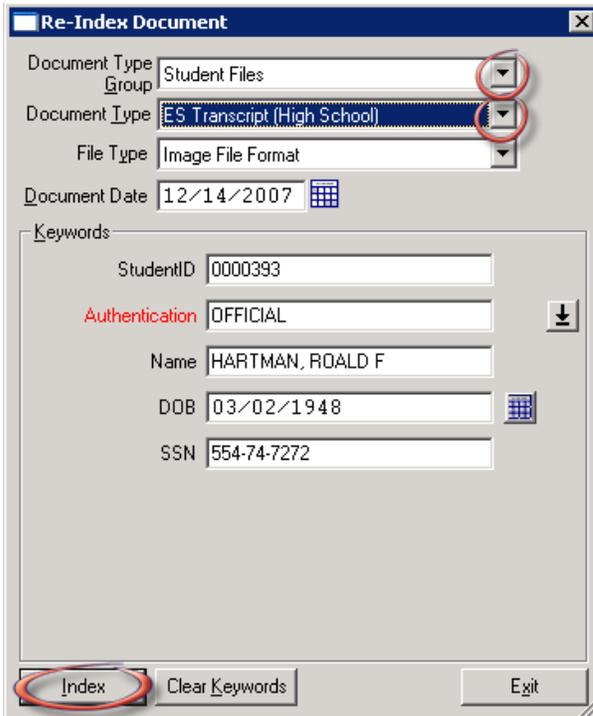
.....
Select Re-Index. The **Re-Index Document** dialog box is displayed.



.....
(optional) Select the new Document Type from the dropdown list. The **Index** button will now be activated.

.....
(optional) Enter the Document Date and/or new Keyword values.

Click the **Index** button.



Once the **Index** button is clicked, the document can only be found and retrieved using the new information.

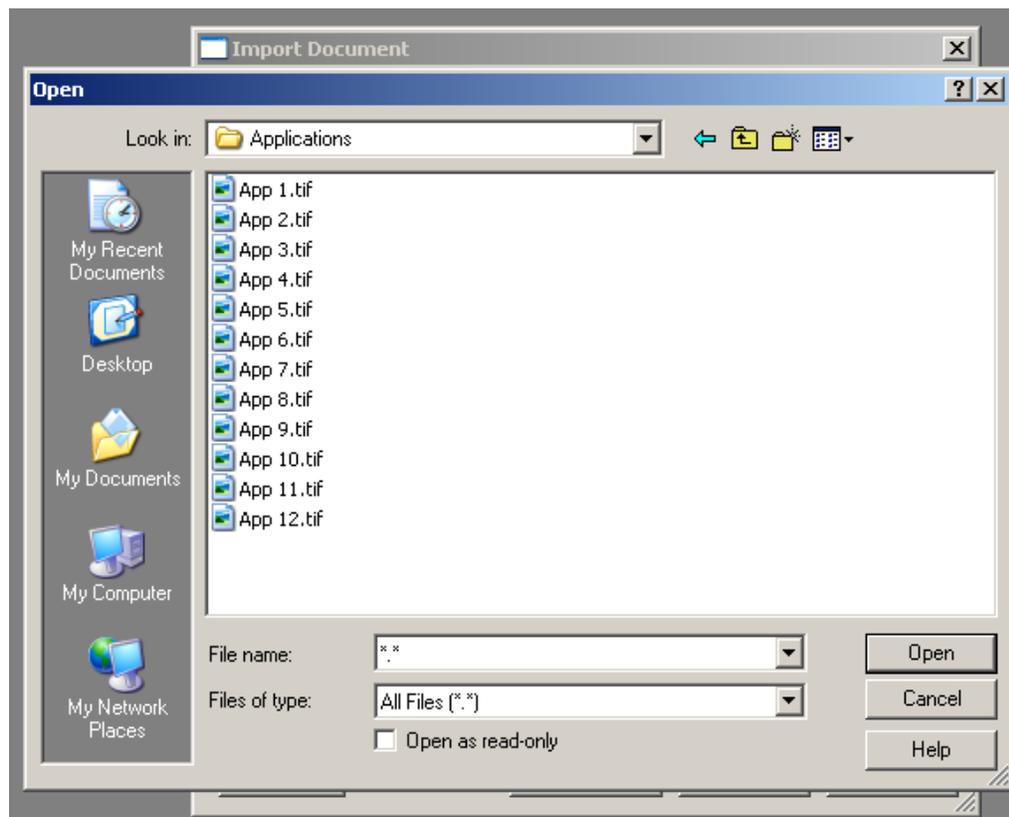
5. Importing a Document

Using the **Import Document** dialog box is a one step process to bring individual documents into the system. You can specify the file name to be imported, along with the **Document Type** and keyword values to use for later retrieval of the document.

Click **File, Import** from the menu bar (or click on the **Import** icon. )



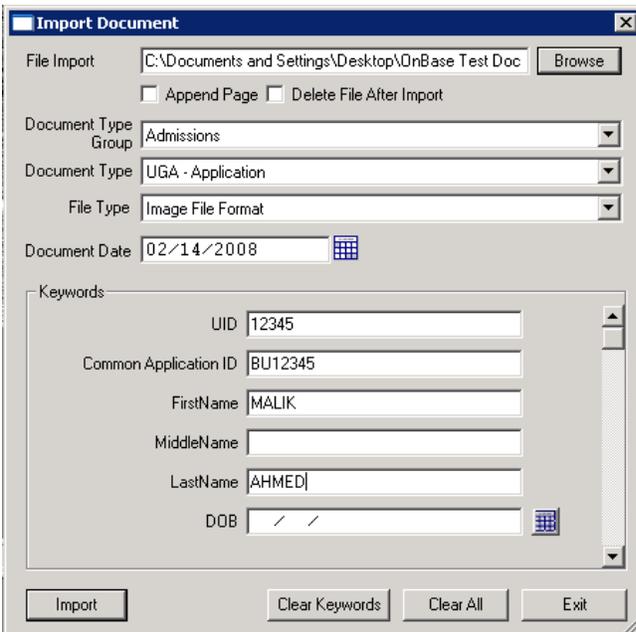
Browse for the document to be imported.



.....
Click on the file to select it

.....
Click Open. The path to the file will be automatically entered into the **F**ull **P**ath to **F**ile box.

.....
The Import Document dialog will display:



File Import

Path where the document is located.

Delete File after Import

Deletes the file from its original location after it has been successfully imported into OnBase.

Document Type

Allows user to indicate the Document Type of the document being imported. A Document Type must be selected before the document can be imported into the system.

File Type

Dropdown list shows the default file type (file format for the Document Type). If you are importing a file that does not match the default file type, select the appropriate file type from the list.

Example: For Word documents select **MS Word Format**.

Document Date

Enter the date that will be used to retrieve the document.

Keywords

Type the keyword values into the Keyword Type fields.

Import

Imports the document into OnBase using the criteria determined in the **Import Document** dialog box.

.....
Clear

Removes all keyword data from the **Import Document** dialog box.

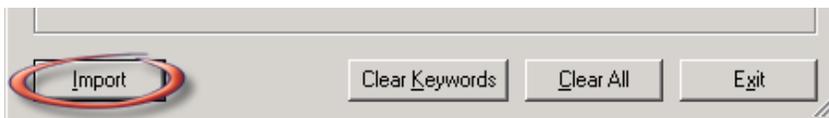
.....
Exit

Closes the **Import Document** dialog box. No information will be saved.

.....
Select a **D**ocument Type from the dropdown menu.

.....
Enter **K**eyword values

.....
Click **I**mport



.....
The document now resides in OnBase and can be retrieved like any other.

Shortcut Keys

Indexing Documents	Working With Documents	Viewing Documents
Index Alt I	Open Document Alt F + O	Scan More Pages Alt S + M
Stop Indexing Alt Q	Close Document Alt F + C	Go To Page Alt S + G
Create New Document Alt R	Retrieval Dialog Box Alt F + O + R	Fit in Window Alt S + F
Delete Document Alt C	New Form Alt F + N + F	Fit Width Alt S + W
Delete Page Alt G	Import Document Alt F + I	Rotate Document 90° Alt S + O + 9
Skip Document Alt K	Re-index Document Alt F + D	Rotate Doc 180° Alt S+O +1
Last Page Alt L	Custom Query Alt F + O + Q	Rotate Document 270° Alt S + O + 2
Next Page Alt N	Mailbox Alt U + M	Save Rotation Alt S + O + R
Previous Page Alt V	Trash Can Alt U + H	View Next Doc on Hit List Ctrl + F7
First Page Alt 1	Help Menu Alt H + H	Keywords Ctrl + K
Scan Alt S	Close All Documents Alt F + L	Re-index Document Alt F + D
Clear Keys Alt Y	Tile Vertically Alt W + V	Thumbnails Ctrl + U
Append Page Alt P	Tile Horizontally Alt W + H	Previous Page Ctrl + PgUp
	Change Password Alt U + C	Next Page Ctrl +PgDn
	Workstation Options Alt U + W	Create Note Ctrl + N
	User Options Alt U + U	Print Document Ctrl + P
		Size / Zoom In (Out) Ctrl + (-)