How to use OnBase Outlook Add-in

This guide offers instructions on how to use the OnBase Outlook Add-in. For instructions on how to install the OnBase Outlook Add-in, please follow the instructions on https://its.mines.edu/onbase/ website.

Upon successful installation, you should see “OnBase” Add-in on your Outlook Ribbon.

When OnBase Add-ins get disabled

If you don’t see it, OnBase add-in might be disabled. To re-enable the add-in, simply click on “Always enable this add-in” and it will come back up.
Importing email attachment from Outlook to OnBase

Perform the following steps to import an email attachment using the OnBase Outlook Add-in.

1. From your outlook client, double click to open the email message that contains the attachment(s).
Select *Import All Attachments*.

2. Import Document panel will appear on the right hand side. Select the Document Type Group and Document Type you want to import to.

3. Keywords panel will appear below the Import panel. Enter keywords values and click *Import*. 
Importing email message from Outlook to OnBase

Perform the following steps to import an email message using the OnBase Outlook Add-in.

1. From your outlook client, double click to open the email message that contains the attachment(s).

   ![Import Pathway]

   Select Import. Repeat step 2 and 3 from Importing email attachment from Outlook to OnBase.

Attaching a document from OnBase to your Outlook message

Perform the following steps to attach an existing OnBase document to your email message using the OnBase Outlook Add-in.

1. Open a new email message:

   ![New Email]

2. Click Attach from OnBase then a Search Panel will appear on the right:
3. Put in your search criteria then click **Find**. Search Result will appear below your email message. Highlight the document(s) you want to attach, then click **Attach from OnBase**:

4. The OnBase document attached as an email attachment.
Using Custom Queries function from OnBase Add-in

To access your custom queries from your Outlook, click on OnBase – Custom Queries:

A separate window will open up and you will see your list of Custom Queries:
Using Retrieval function from OnBase Add-in

To access your custom queries from your Outlook, click on OnBase – Retrieval:

A separate window will open up and you will see your list of Document Types and Groups:
Importing a File from OnBase Add-in

To import a file (that resides outside of Outlook) from your Outlook, click on OnBase – Import from File:
A separate window will open up and you will see your list of Document Types and Groups:
Then you can browse or drag and drop your file, select your Doc Type Group -> Doc Type, enter your Keywords, and then import your file. Refer to OnBase QRG Importing docs using Unity Client for details.