

Importing Documents – Web Client

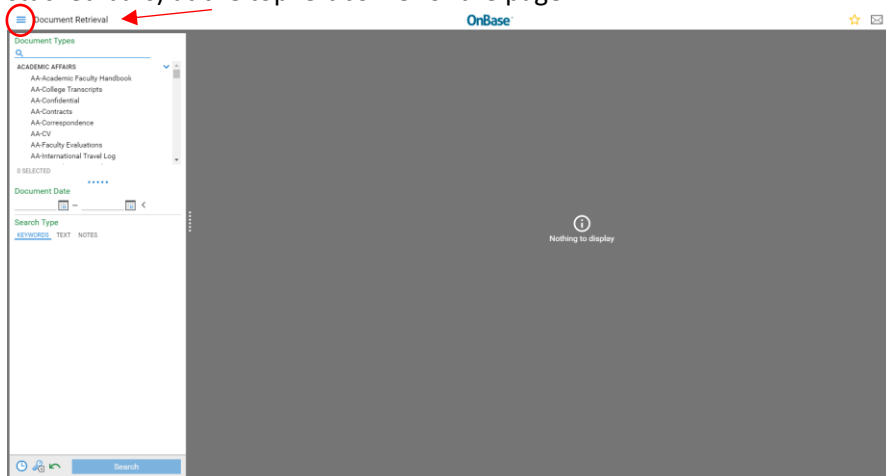
This guide offers instructions on how to import documents using the OnBase Web Client. For instructions on how to import documents using the OnBase Unity Client, see the [Importing Documents using the Unity Client](#) Quick Reference Guide.

Electronic documents can be imported to OnBase using a number of methods including Batch Scanning, which can only be done using the OnBase Unity Client. For instructions on how to scan batches of documents or sweep multiple documents into OnBase from network directories, see the [Batch Scanning and Sweeping using Unity Client](#) Quick Reference Guide.

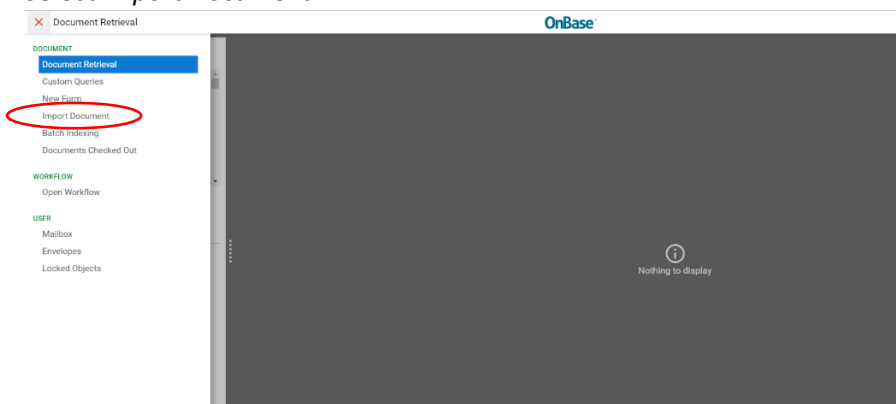
Importing Documents

Perform the following steps to import a document using the OnBase Web client.

1. From the Web Client homepage, navigate to **Import Document**.
By default, the Web Client will open to *Document Retrieval*. Click the navigation menu (three stacked bars) at the top left corner of the page.

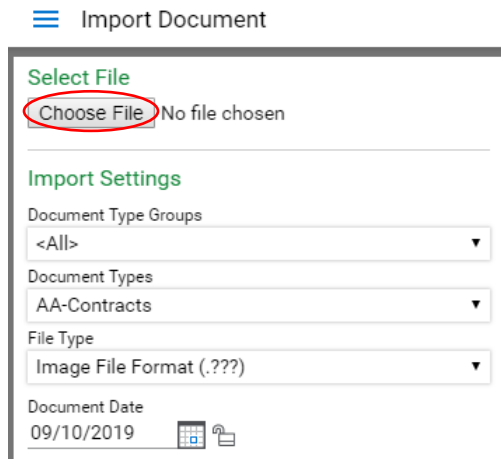


Select *Import Document*.

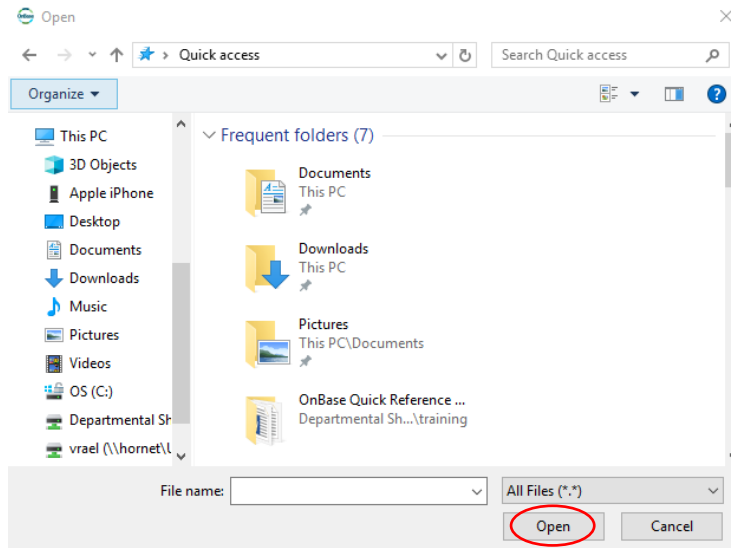


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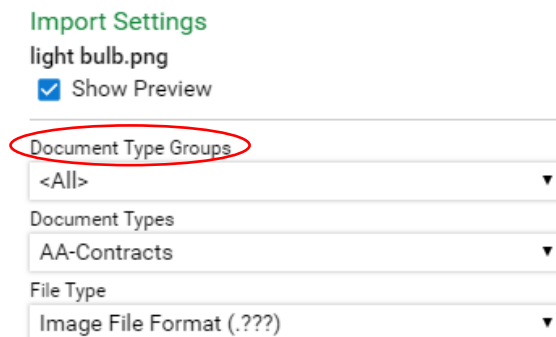
2. On the top right corner of the screen, click **Choose File** to select a file for upload.



A popup window will appear. Select the document you want to upload and click *Open*.



3. Under the Import Settings section on the left-hand side of the screen, choose the following:
 - a. Select the appropriate **Document Type Group** from the drop-down list.



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- b. Select the appropriate **Document Type** from the drop-down list.

Import Settings
light bulb.png
☒ Show Preview

Document Type Groups
<All>

Document Types
AA-Contracts

File Type
Image File Format (.???)

- c. Do not change the **File Type**. The appropriate File Type will be filled automatically based on the file selected for import. Changing this setting may cause a corrupted import.
- d. Use the checkbox to indicate whether or not to Initiate Workflow processing for the document (if a workflow is configured for the selected document type) and assign a user, if needed.
- e. Enter **Keyword** values.

Note: These values will be used to retrieve the document in a search. Fields labeled with **red text** are required keywords; the document cannot be indexed without these values.

KEYWORDS

ID

Last Name

First Name

Middle Name


Position

Position

Position Number

Position Suffix

4. Click the **Import** button at the bottom to upload the document into OnBase.

 **Import**

A popup window will appear at the top of the screen once the document is imported.

Document Queue (1)
light bulb.png Imported Successfully