

# OnBase Quick Reference Guide

## Indexing Documents – Web Client

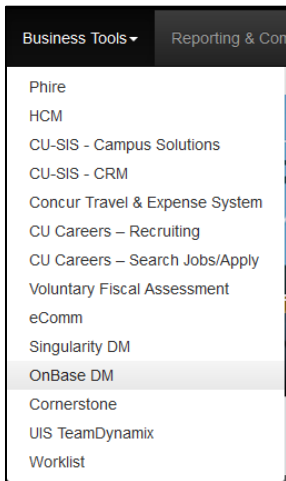
Indexing is the process of adding keyword values to documents in order to search for content (retrieve), route items through workflow, report on content and more. This Quick Reference Guide covers indexing documents imported in batches using the OnBase Web Client. Refer to [Indexing Documents – Unity Client](#) for information about how to index using the desktop client.

Please note that your processing may vary from the basic process described in this guide depending on the configuration of the scan queue being used. For more information about your department's scan queue(s), please contact your [departmental administrator](#).

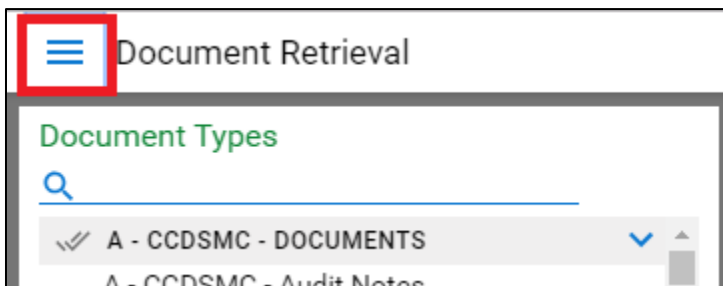
### Indexing documents

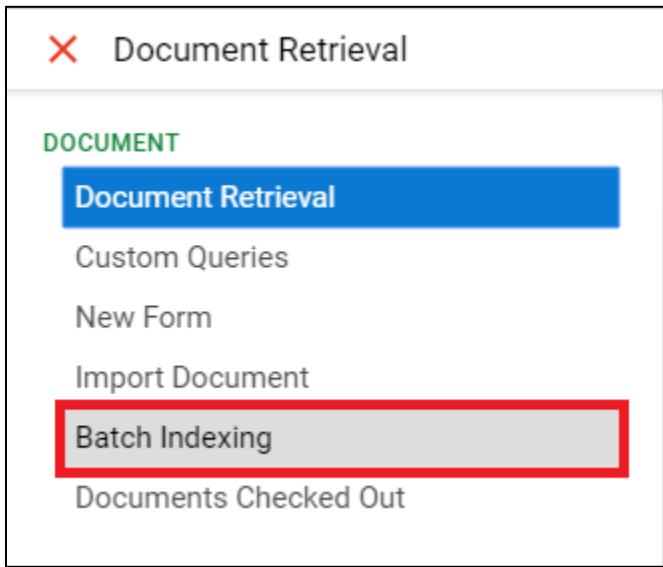
Perform the following steps to index a document using the OnBase Web client.

1. From the employee portal/CU Resources tab, select OnBase DM under Business Tools.

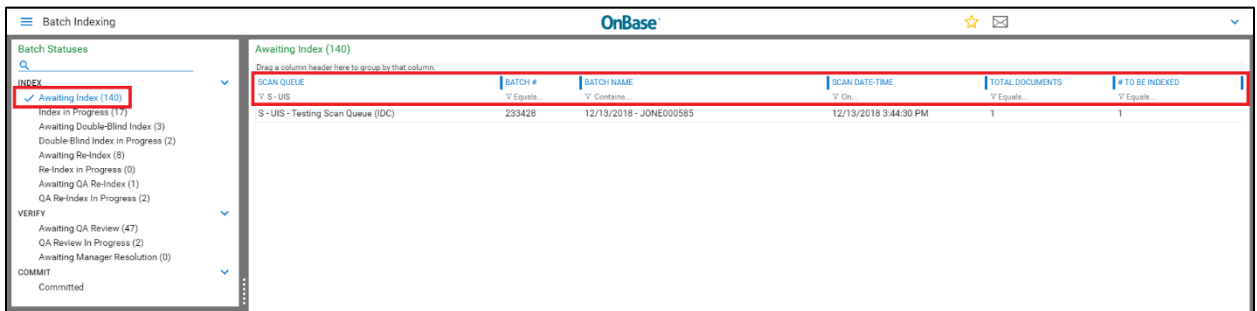


2. Open the navigation menu and choose **Batch Indexing**.

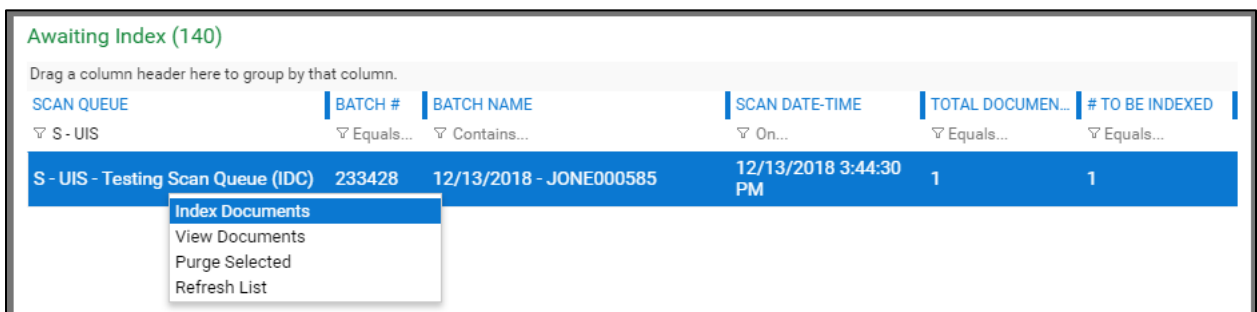




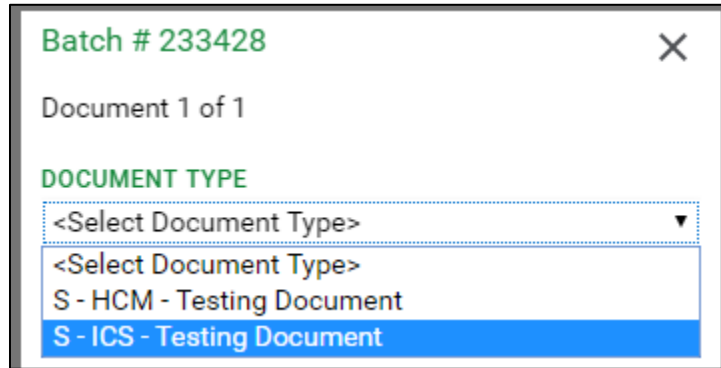
3. Select the status for the desired batch. The number of batches in each status will show next to each status. For newly scanned documents, the status will likely be **Awaiting Index**. A list of batches will be displayed. Column headings can be used to filter, sort and/or group the list of batches.



4. Select the batch you want to index and right click. Choose **Index Documents** to proceed with indexing. To view the documents in the batch, choose **View Documents**. **Purge Selected** will delete the batch; only some users will have access to do so. To refresh the list of batches, select **Refresh List**.



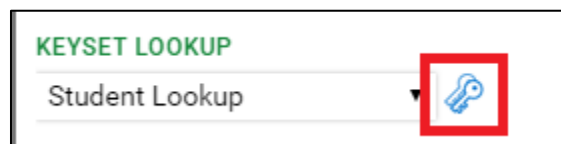
5. After choosing **Index Documents**, for each document/page in the batch:
  - a. If a **Document Type** has not already been specified based on the scan queue or during pre-indexing (prior to scanning), choose a **Document Type** from the drop-down list.



- b. Enter all applicable keyword values.
  - i. Keyword fields labeled with red text are required keywords; the document cannot be indexed without these values.

- ii. For student and employee documents, entering a valid Student ID or Employee ID and using the tab key on your keyboard should fill the First Name, Middle Name, Last Name and/or Date of Birth (depending on the keyword types used on the document type).

A lookup button may be available which allows you search for records based on partial information in order to fill the other keyword values. Click the lookup button.



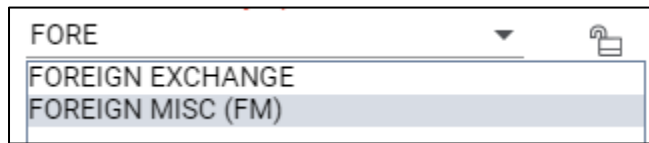
Enter the information you have and click **Find**. Identify the correct

result, select it and then click the **Apply Keywords** button.

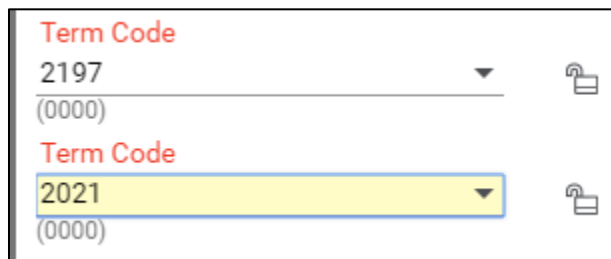
- iii. If the same keyword value should be applied to following documents, click the lock icon to retain the value for that keyword type until the lock is removed or the batch is complete.



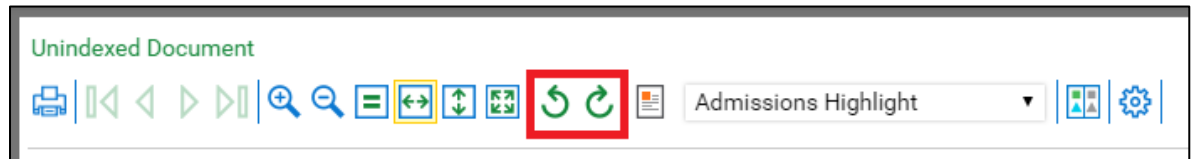
- iv. Some keyword types have a set of allowable values to use during indexing. If a drop-down list of values is available, you can begin typing a value to filter the list down to entries that match the entered text.



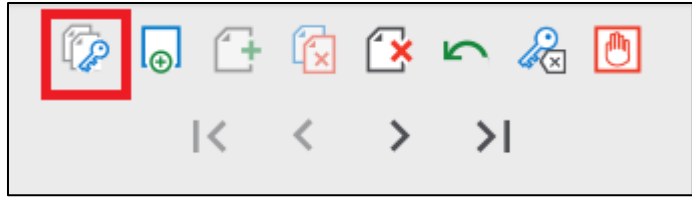
- v. Click a keyword field label to add another instance of that keyword value (for example, if the document applies to two semesters, you can double click the Term Code keyword to enter values for 2197 and 2021). **Note:** This is not available for all document types.



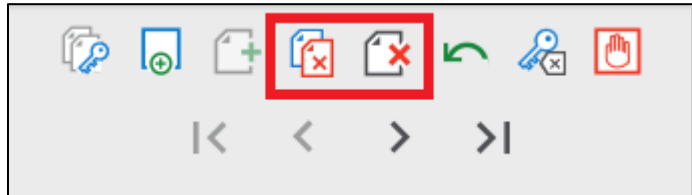
- c. You can rotate pages if necessary, using the buttons above the document preview.



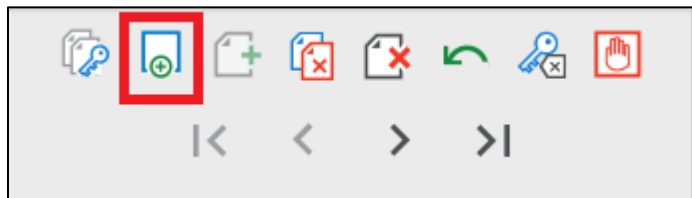
- d. Once you are ready, click the **Index** button at the bottom of the left side panel.



- e. If the page or document should be deleted, click the **Delete** button at the bottom of the left side panel.



- f. If the page should be added to the previous document, click the **Append** button at the bottom of the left side panel.

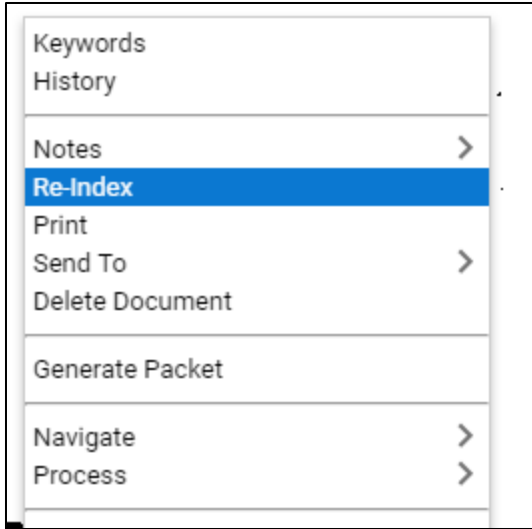


6. When all documents in the batch have been indexed or deleted, the batch will be moved to the next processing stage.

## Re-Indexing Documents

Re-Indexing documents allows for keyword values on stored documents to be modified/corrected, along with changing the document type if necessary. Please note that not all users will have the ability to perform re-indexing. The following is the process to re-index a document using the web client.

1. Retrieve a document using the procedures in the [Retrieving documents – Web Client](#) Quick Reference Guide.
2. Right click the document in the results list or in the document viewer and choose **Re-Index** from the menu.



3. Update the Document Type and/or keyword values as necessary and click **Re-Index** at the bottom of the pop-up window to save. Any keyword fields with a red label are required and the re-index cannot be completed without values in those fields. **Never change the file type.**

