

OnBase Quick Reference Guide

Submitting Content – Web Client

Content can be imported to OnBase using a number of methods.

To access the web client, refer to the [OnBase Web URLs and Unity Client ClickOnce URLs](#).

Batch Scanning is covered under the [Scanning Documents Quick Reference Guide \(QRG\)](#) and must be done using the Unity client. Refer to that guide to learn how to scan batches of documents or sweep multiple documents into OnBase from network directories.

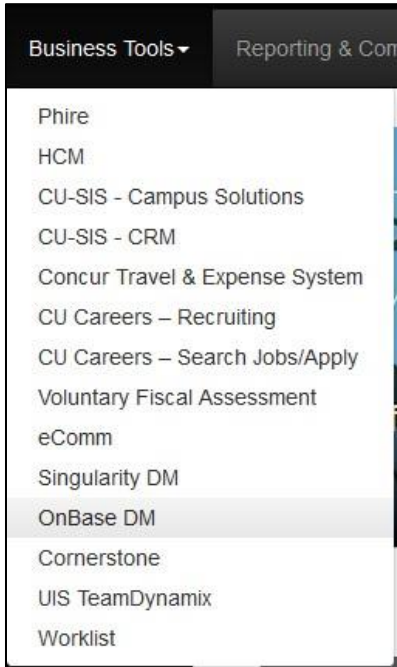
Refer to the [Submitting Documents – Unity Client](#) to learn how to import content using the Unity client.

This Submitting Content – Web Client QRG details importing content using the OnBase Web client.

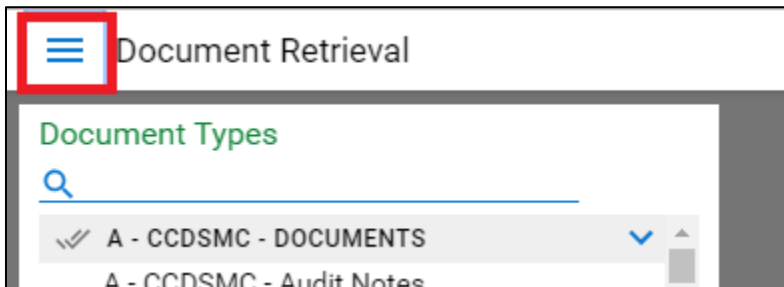
Importing Documents

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

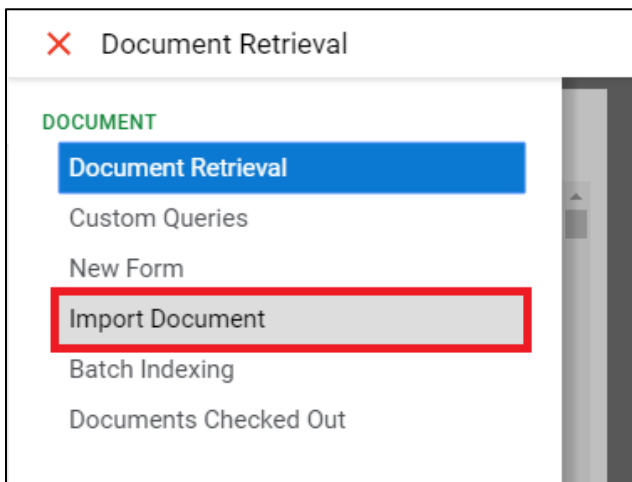
1. From the employee portal/CU Resources tab, select **OnBase DM** under Business Tools.



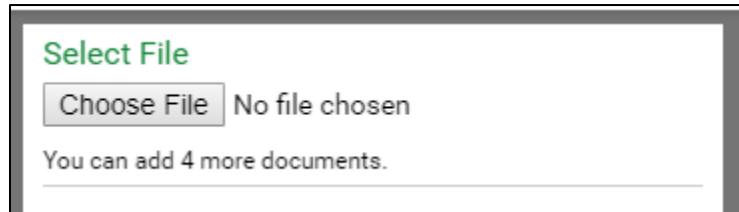
2. Open the navigation menu.



3. Select **Import Document**.



4. Choose the file(s) to import. You can either:
 - a. Click **Choose File** to select a file to upload.

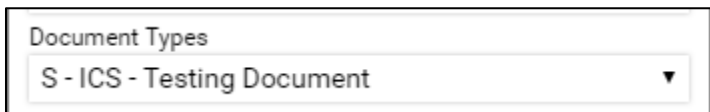


- b. Drag and drop up to 10 files.

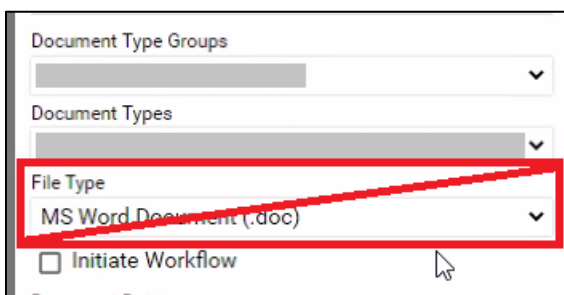
5. Select the appropriate document type group from the **Document Type Groups** drop down list.



6. Select the appropriate document type from the **Document Types** drop down list.



7. The appropriate file type will be filled automatically based on the file selected for import. **Never change the file type!** Doing so will cause a corrupted import and the document will not be viewable in OnBase.



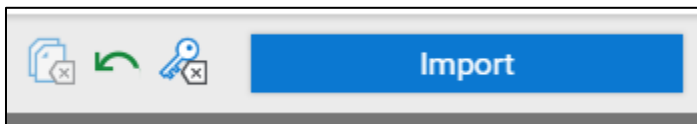
8. Enter keyword values. These values will be used to retrieve the document in a search. Keyword fields labeled in **red** are required in order to import the document.

Many document types are configured with an autofill keyword set which will fill values like name and date of birth based on student or employee ID, for example. After entering the primary value, use tab to expand the autofill.



A screenshot of a form panel. At the top, the word "KEYWORDS" is written in green. Below it, "Student ID" is written in red. There are three input fields: "First Name", "Middle Name", and "Last Name". To the right of each input field is a small icon of a document with a keyhole, indicating an autofill option.

9. Click the **Import** button at the bottom of the panel.



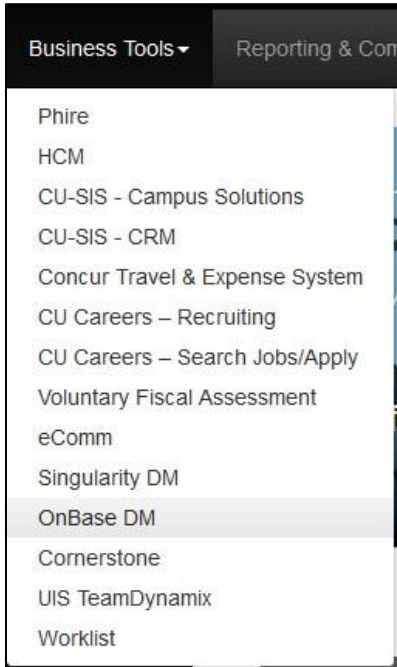
10. OnBase shows that the document imported successfully in the top banner of the screen.



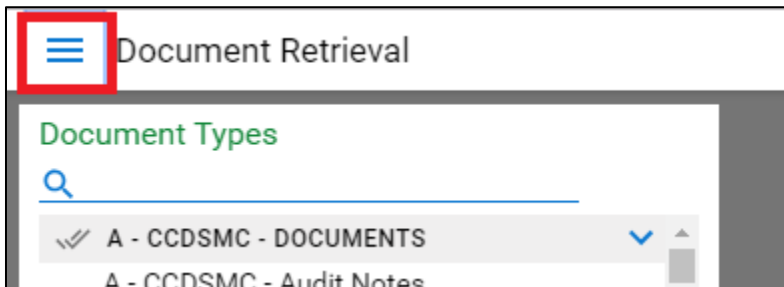
Submitting Unity Forms

Perform the following steps to create a document by submitting a Unity form in the Web client.

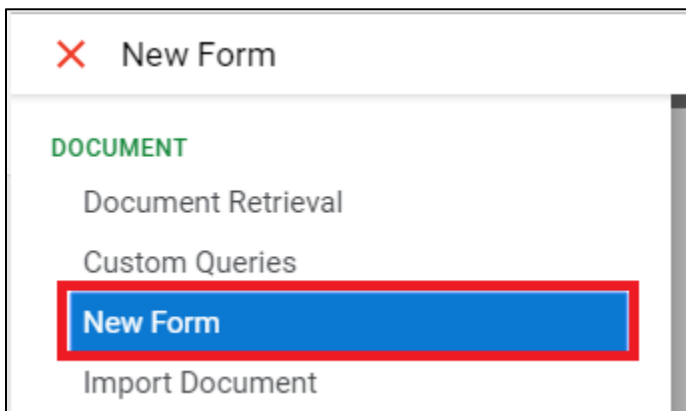
1. From the employee portal/CU Resources tab, select **OnBase DM** under Business Tools.




2. Open the navigation menu.




3. Select **New Form**.



4. Choose the desired form from the list at the left.

SYSTEM DOCUMENTS 

  [S - UIS - New Customer Survey](#)

5. Fill all applicable form fields. Required fields are marked with a red asterisk (*). Please note that forms are interactive and may change as you complete the form.

Departmental Information

Campus *  **Department ***

6. Click the **Submit** button to save the form to OnBase.

