

- 1) Q **I have documents that I export from various programs and have been printing them off and then scanning them into OnBase, is there a more efficient way to do this?**
- A Yes, you can import documents right into OnBase.

In OnBase go to the **menu bar**

Click **File**

Click **Import**

The Import Document dialog box appears

Click **Browse** to locate your file

Select the **Document Type Group**

Select the **Document Type**

Select the appropriate **File Type**, if not already displayed

Enter the **Document Date** and necessary **keywords**

Click **Import**

The document is now available for retrieval

Attachment:

 [Importing Documents into OnBase.pdf](#)

- 2) Q **When I log into OnBase I am presented with the Document Retrieval Window, but I'm a scanner/indexer, is there a way to change it to display the Scan/Index Window when I log in?**
- A Yes, in OnBase go to the **menu bar**

Click **User**

Then **User Options**

In the User Options dialog box Click on the **Startup Tab**

Check the box next to **Scan**

Uncheck the box next to **Iconized** (otherwise the Scan/Index window will be minimized at the bottom of your screen.)

You must re-launch OnBase for the change to take effect. To do this without logging out and logging back in ~ Go to the **menu bar** and choose **File** then **Re-launch Client**.

For additional information on this topic use the OnBase help feature ~ in the **menu bar** click on **Help** then **Client Help**. Select the **Search Tab** and type in **User Options Startup Tab**. **Double click** on the **User Options Startup Tab** topic from the list.

- 3) Q **I have a document in OnBase I want to print but I don't see my printer listed in the Print Queue. How do I print?**
- A We'll need to set up a print queue for you before you'll have access to your printer from OnBase. In order to set up the print queue we'll need you to send us an email with the "name" of the printer you want to use.

An example of a printer "name" might be: \\DCMO\Admin Printer Area or BTUE-BizhubC500C F3 on bns-print

~ Remember: upper and lower case are important as well as any slashes, dashes, spaces, or

underscores.

The easiest way to find the name of the default printer for your computer would be to navigate to the top of this webpage and

Click **File**

Then click **Print**

Write down the full name of your default printer

Email it to: mis@btboces.org

4) Q **Is it possible to set up an account for our auditors in OnBase? We would only like them to be able to view the documents we send them via internal OnBase mail.**

A Yes, We can create a very restrictive account for your auditors. Please complete a New User Request worksheet, attached, with the following informaton:

Requestor/District: Your name/District

User Name: **District Prefix - Auditor**

User Group(s): **Auditor**

In order for Auditors to view the files you email them they will need the following privileges:

Under Document Privileges check the following boxes

Retrieve/View ~ *Note: This will not allow them to retrieve documents on their own as they will not be assigned to any Document Type Groups or Document Types*

Internal Mail

Submit the completed form via email either by clicking the Submit by Email button, located at the top right of the New User Request Worksheet, or by emailing the completed form to:

mis@btboces.org

Attachments:



[New User Request.pdf](#)



[User Privilege Definitions.pdf](#)

5) Q **I deleted a document I shouldn't have is it possible to get it back?**

A Yes, the document is temporarily stored in your OnBase Trash Can.

Go to the menu bar

Click **User**

Then click **Trash Can**

Find and **select the document you want to restore**

Right-click on it

Select **Undelete Selected**

A prompt will ask "**Are you Sure**"?

Click **Ok**

The document has now been restored

6) Q **Does OnBase have any Shortcut Keys available?**

- ⚡ A Yes, OnBase has many Shortcut Keys available. They become visible when you press the Alt key or F10. ~ *Note: The Shortcut Keys toggle on and off and can not be set so they are permanently visible.*

Download the attached document for more information on the Shortcut Keys.

Attachment:

 [Client Module Shortcut Keys.pdf](#)

- ^ 7) Q **Is it possible to scan more pages into an existing document?**

- ⚡ A Yes.

At the scanning workstation **locate and open the document** that you wish to add to.

Right-click on it.

Choose **Scan More Pages**.

An informative dialog box will open indicating that you will need to select a Scan Queue and a Scan Format.

Click **OK**

Select the appropriate Scan Queue and Scan Format.

Click **Scan**

A dialog box will open requesting information on where in the new document you would like the pages placed ~ the beginning, before selected page, after selected page, or the end of the document.

Choose desired location

Click **OK**

The additional pages will be added to your document.

Download the attached User Guide for more information.

Attachment:

 [Scan Index User Reference Guide.pdf](#)

- ^ 8) Q **I'm having an issue with AutoFill for a few employees and students when I enter their student/employee primary keyword it's not populating the rest of the information automatically, what's wrong?**

- ⚡ A The student or employee may need to be added to the AutoFill file.

To add the person to the file go to the **menu bar**

Click on **Admin**

Then click **AutoFill Keyword Sets**

Then **Management**

Select the appropriate AutoFill Keyword Set you wish to add the person too

Click **Add Set**

Fill out the AutoFill Keyword Set Add Dialog Box

When complete Click **Add**

The person has now been added to the AutoFill File and their information will populate when the primary keyword is entered.

- ^ 9) Q **Is it possible to view the contents of an AutoFill File and can they be exported into a report?**

- ⚡ A Yes it's possible to both view the contents of an AutoFill file and export the contents to a file to view outside OnBase.

To view the contents of the AutoFill file go to the **menu bar**

Click on **Admin**
Then click **AutoFill Keyword Sets**
Then **Management**
Select the AutoFill Keyword Set you wish to view
Click **View All**
To export the data **right click** in the report
Select **Create Report** from the menu
Name and save the file.
Open the text file in Excel to easily view the data in a spreadsheet

10) Q **I noticed that I have duplicate entries for a person in my AutoFill file is there a way to delete one of them?**

A Yes, you can delete multiple entries in the AutoFill File.

To delete a duplicate go to the **menu bar**

Click **Admin**
Then click **AutoFill Keyword Sets**
Then **Management**
Select the appropriate AutoFill Keyword Set from the list
Click **View All**
Scroll through the list and **click on the duplicate entry** you wish to delete.
Right Click on it
Choose **Delete Selected**
A box will pop up asking if you are sure
Click **Yes**
The duplicate has now been deleted.

11) Q **Our district is set up with a File Cabinet but when I try to access it on my computer the File Cabinet dialog box opens and there is nothing in it, what's wrong?**

A There is a user setting that needs to be reconfigured so that you can view your File Cabinet Folders.

In OnBase, go to the **menu bar**
Click **User**
Then **User Options**
In the User Options dialog box under the **General Tab**
Check the box next to **Classic File Cabinets Window**

You should now be able to see all of the Folders in your File Cabinet. If not, you'll need to contact the help desk @ mis@btbooces.org to ensure you have access to the Cabinet

12) Q **Is it possible to access the GroupWise address book in OnBase?**

A Yes.

Right click in an opened document
Choose **Send to**
Then **Mail Recipient**
Click the **Address icon** or the **To:** button to open the GroupWise Address book.

13) Q **I view a document and it is oriented incorrectly, what can I do to fix it?**

A The document can be rotated using the "Rotate" arrows on the tool bar. Once the orientation is

corrected, the document will keep the new orientation automatically.

Go to the menu bar

Click **User**

Then click **User Options**

Select the **Document** tab

Click in the check box for "**Rotate Auto-Save**"

Click **Ok**

The document is now saved the way you left it.

14) **Q There are page headers and footers on printed documents from the OnBase Web Client. Can I remove them?**

A Yes, it's a browser setting.

To remove them from Internet Explorer:

Open your Internet Explorer browser

Click **File**

Click **Page Setup**

The Page Setup dialog box appears

In the Headers and Footers section change all drop down choices to **-Empty-**

Click **OK**

The document should now print without any headers or footers

To remove them from Firefox:

Open your Firefox browser

Click **File**

Click **Page Setup**

The Page Setup dialog box appears

Click the **Margins & Header/Footer** tab

In the Headers & Footers section change all drop down choices to **--blank--**

Click **OK**

The document should now print without any headers or footers