OnBase Quick Reference Guide
Submitting Content – Office Add-Ins

Content can be imported to OnBase using a number of methods. Use this guide to learn how to import content using the Microsoft Office Add-ins that can be installed on a Windows PC. Add-ins are available for Outlook, Word and Excel and are very similar to the Unity client.

To install the add-ins, 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.

The [Submitting Content – Web Client QRG](#) details importing content using the OnBase Web client.

Importing documents
The process is generally the same for each of the add-ins. In addition to being able to import the current document/item you have open, you can also use these integrations to import other files.
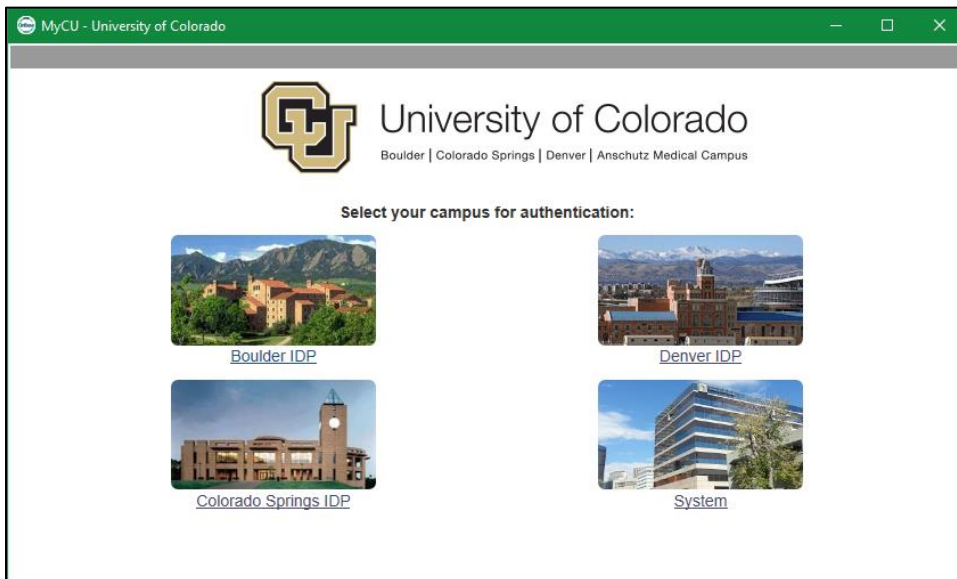
Logging In
If you are not already logged in, you will be prompted to sign in with your campus credentials.

First, select your campus. Depending on the size of the window, you may see campus names only or the campus names along with pictures. Single click on campus names or double click if the picture is displayed.
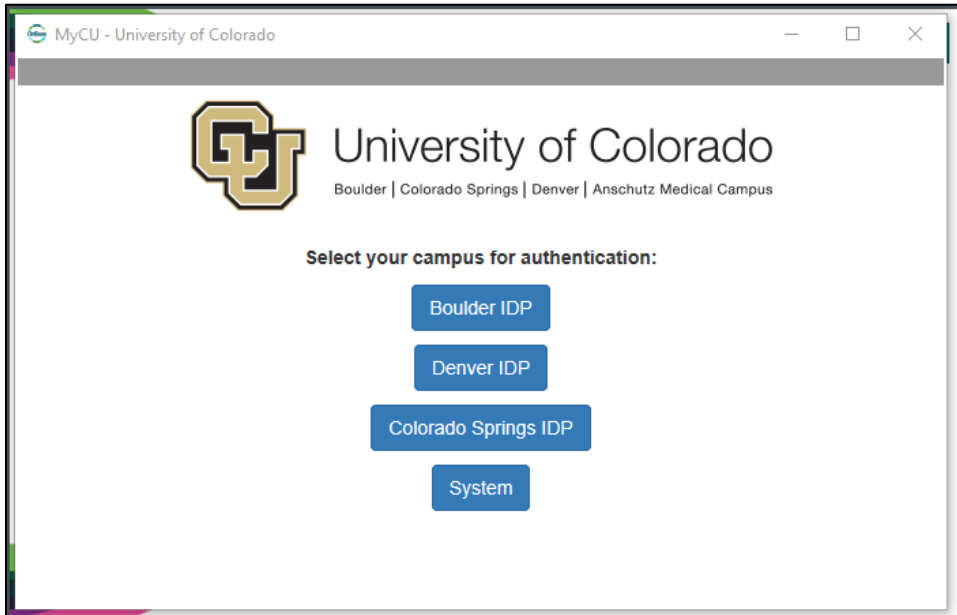
Single click to select the desired campus.

Double click to select the desired campus.

Enter your campus credentials. For assistance with your campus credentials, refer to the links on the login page for your campus.
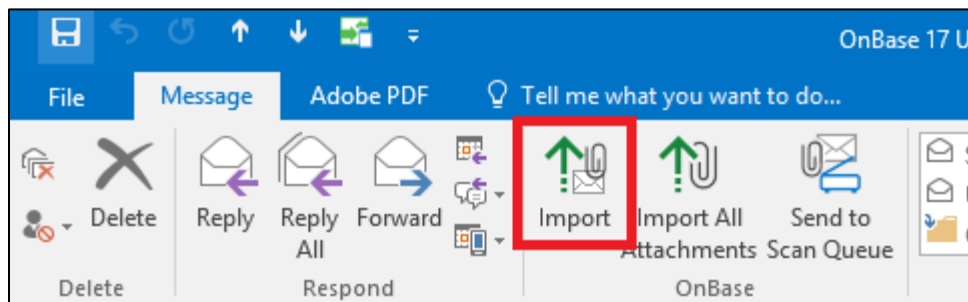
Upload an Email from Outlook
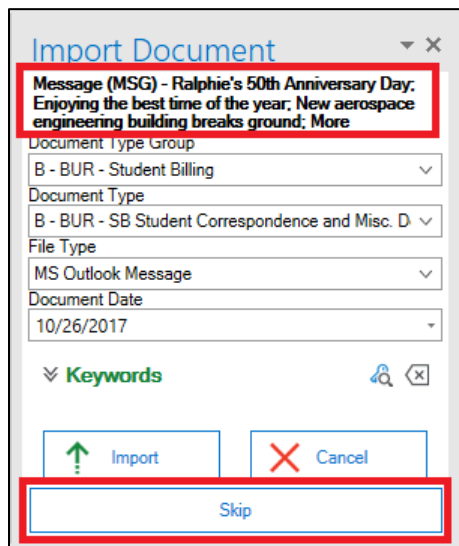*Using this method, you can upload email messages to OnBase.*

With the desired email message(s) selected, click the OnBase tab in the menu ribbon. Then choose the Import button.
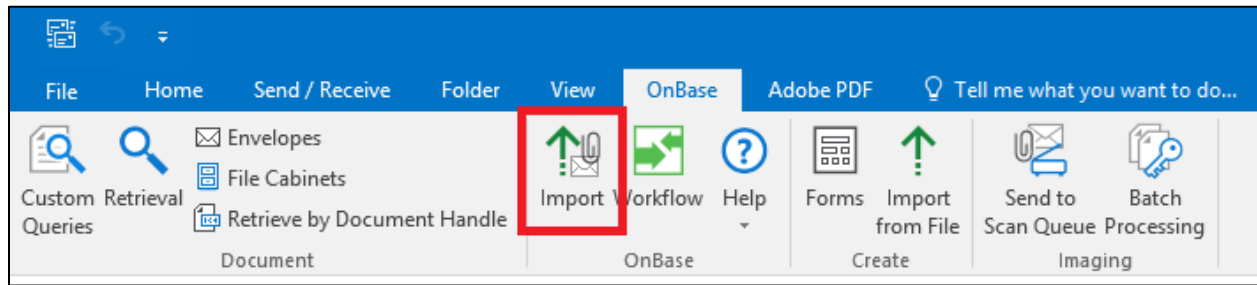
Or, with the desired message open, click the Import button in the menu ribbon.

The message will now be open with the OnBase import panel on the right side. Look just below Import Document to tell which item (message or attachment) is queued for upload. If any item should not be uploaded, you can click Skip at the bottom.

Choose a document type group (optional) and document type (required).

University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus

Once a document type is selected, the associated keywords will appear in the indexing panel.

Enter keywords. Required keywords are labeled in red. Some keywords, such as Student ID and Employee ID, are associated with auto-fill keyword sets (AFKS). This will fill in the name based on the ID entered.

Do not change the file type! Doing so may cause a corrupted import.

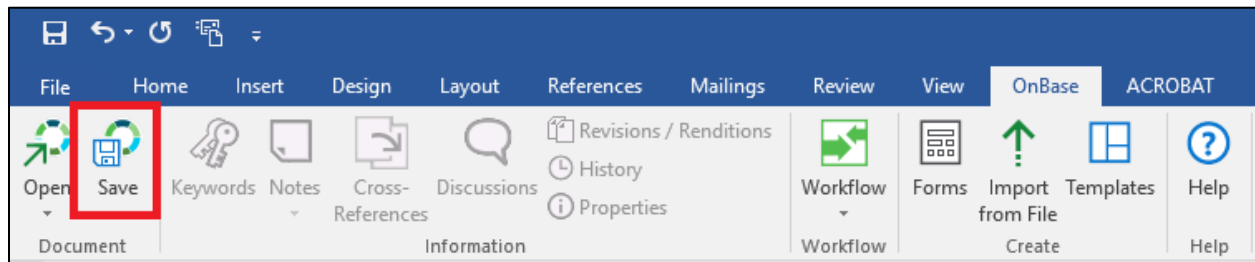Then click Import at the bottom.

Upload Current Document

This method is to upload the document you currently have open in Microsoft Word or Excel.

Go to the OnBase tab in the ribbon menu and click Save.

This will open the indexing panel to the right of the document. Select a document type group (optional) and document type (required).

Once a document type is selected, the associated keywords will appear in the indexing panel. Enter all applicable keyword values; required keywords are displayed in red. Some keywords, such as Student ID and Employee ID, are associated with auto-fill keyword sets (AFKS). This will fill in the name based on the ID entered.

Do not change the file type! Doing so may cause a corrupted import.

If desired, click to expand the Options section and make any changes. Then click Import at the bottom.

Upload a Document Saved Elsewhere

Using this method, you can upload documents saved to your desktop or a network drive.

Go to the OnBase tab in the menu ribbon. Then choose the Import from File button.
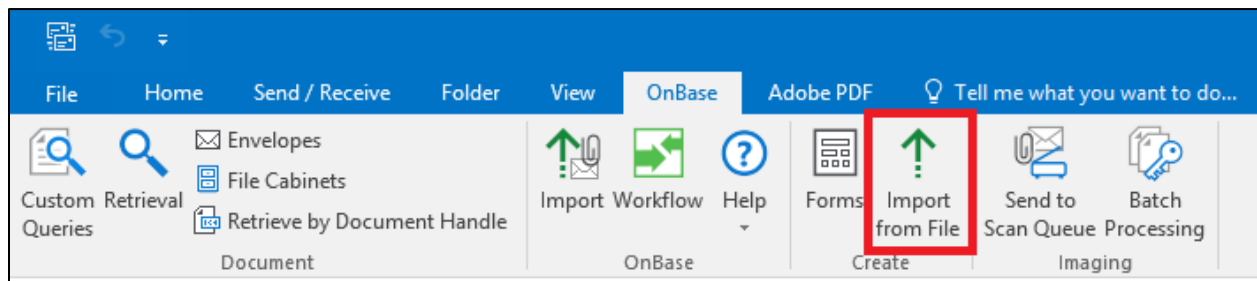
This will open a new window for importing documents. Next you will need to identify which document(s) you would like to upload. There are two methods to do this.

1. Click the Browse button, navigate to and select the desired document. Click Open in the file browser. Only one document can be selected using this method.

University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus
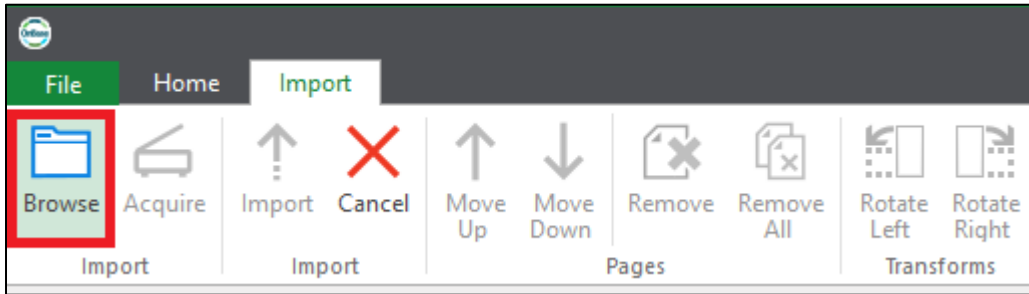
2. Navigate to the document(s) in your computer's file explorer. Select one or more documents, then click and drag into the document preview area. If more than one document is selected, you will be prompted to decide if you want to combine the documents or upload each one individually.

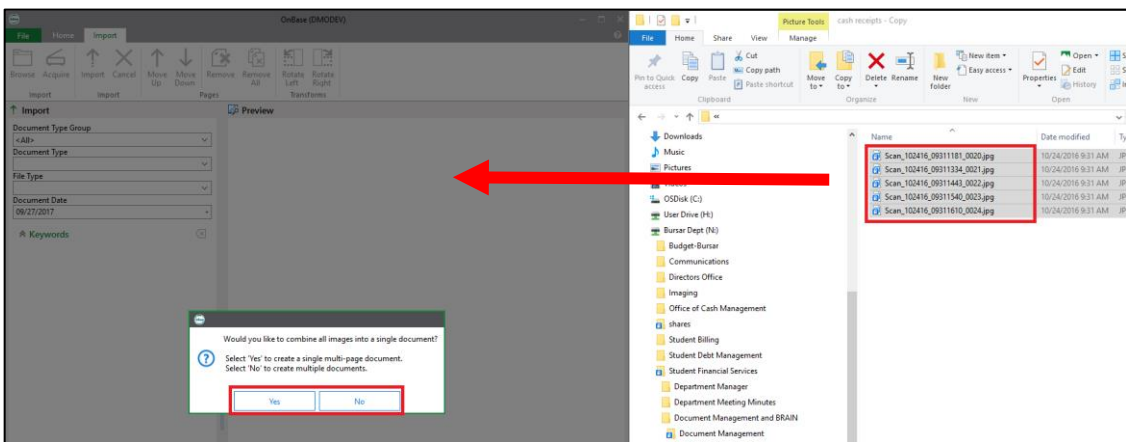If the file is an image or PDF, a preview will be displayed and the indexing panel will be at the left.

Select a document type group (optional) and document type (required).

Once a document type is selected, the associated keywords will appear in the indexing panel. Enter all applicable keyword values; required keywords are displayed in red. Some keywords, such as Student ID and Employee ID, are associated with auto-fill keyword sets (AFKS). This will fill in the name based on the ID entered.

Do not change the file type! Doing so may cause a corrupted import.

Then click Import at the bottom.

University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus

Archive an Email Using a Configured Folder (Outlook only)

Using this method, you can upload email messages to OnBase with pre-selected settings.

By configuring folders, you can upload email messages to OnBase with pre-selected settings, including the document type. Once the folder is configured, you can upload messages to OnBase more quickly and easily. Please note that this configuration must be completed at each computer, even for shared email accounts.

Prior to using this method, you will need to configure the folder with the desired settings. Either create a new folder in your Inbox or select an existing folder. Right click the folder and choose Folder Configuration. You will be prompted to log in if you have not already.
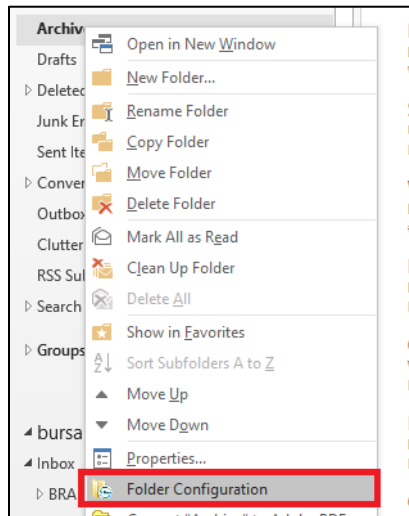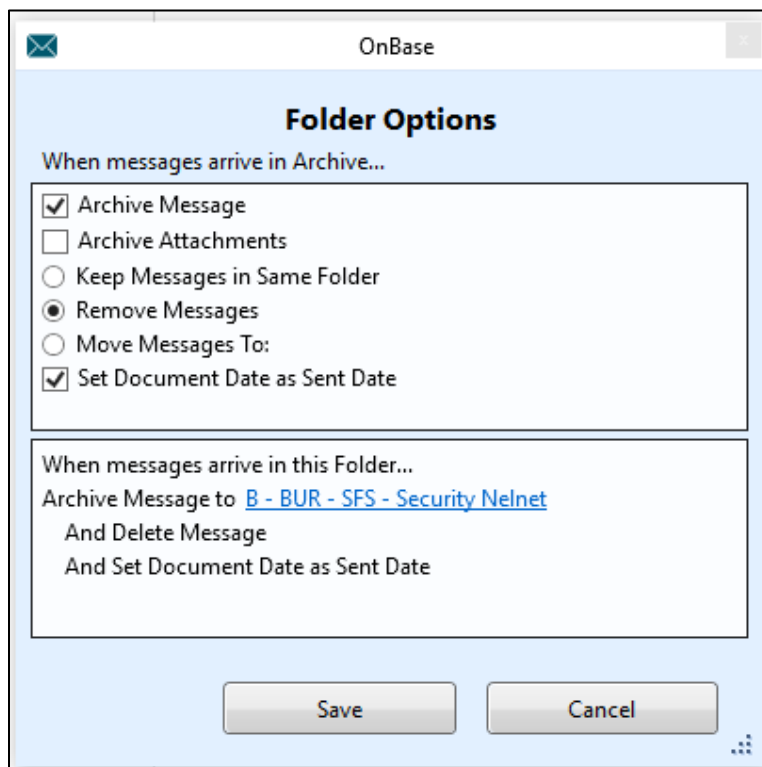
The Folder Options message box will appear where you can choose a default document type and other settings for the folder. This folder configuration is similar to other Outlook rule configuration.

Option	Description
Archive Message	Select to archive email messages. Click the Document Type hyperlink to select a Document Type.

Archive Attachments	Select to archive email attachments. Click the Document Type hyperlink to select a Document Type.
Keep Message in Same Folder	When selected, email messages uploaded to OnBase using this folder are left in the folder after being uploaded.
Remove Message	When selected, email messages uploaded to OnBase using this folder are moved to the Deleted Items folder after upload.
Move Message To:	When selected, email messages uploaded to OnBase with this folder are then moved to a different location. Click the Folder hyperlink to select a folder location.
Set Document Date as Sent Date	Select if the Document Date value should be the same as the MAIL Date value.

Once the folder is configured, messages can be dragged into the folder. When a message is dragged into the folder, the upload panel will open with the pre-selected settings in place.

Multiple folders can be configured, each with their own pre-configured settings.