

OnBase User Guide

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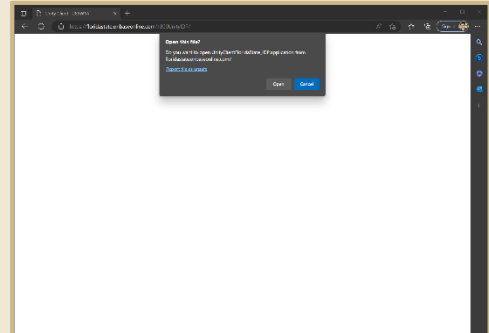
OnBase Installation

There are currently two methods to access OnBase, which are detailed below.

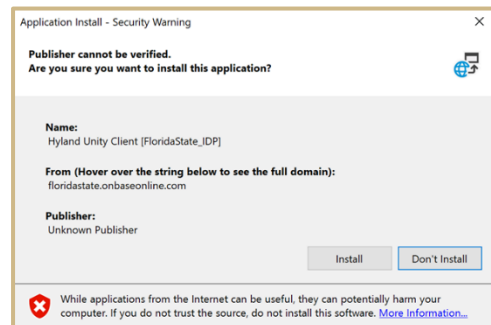
Microsoft Edge Web Installer

The **Microsoft Edge** browser must be used to install the desktop application.

1. Open Microsoft Edge and navigate to <https://FloridaState.onbaseonline.com/1800UnityIDP>
2. At the top of the screen, you will be prompted to open **UnityClientFloridaState_IDP.application**. Click **Open** to begin the installation.



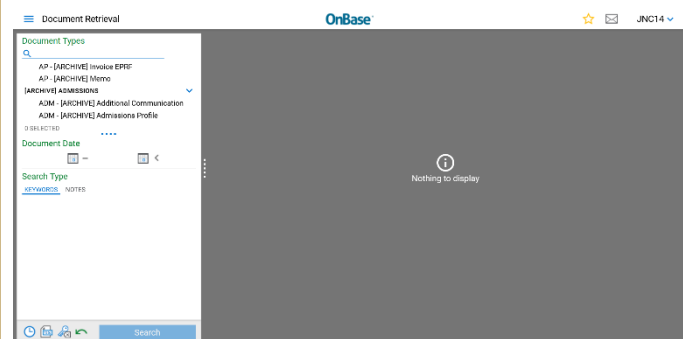
3. You should now receive a security warning asking if you would like to install OnBase. You can click **Install** and the application will proceed to download and install by itself. This usually takes ~10 minutes, but times may vary.



OnBase Web Application

1. Navigate to <https://floridastate.onbaseonline.com/1800IDP>
2. You will be prompted to enter your CAS login information.

3. After completing the CAS login, you will arrive at the OnBase Web Application homepage.



Security and Access

Frequently Used OnBase Roles

*** This is not a comprehensive list of OnBase user roles. ***

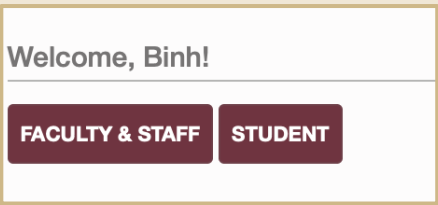
Please email EMT-Security for questions on OnBase user roles.

FSU_OB_EMT_VIEW	<p>This is the most common role. This will give users the ability to view Admissions files for students.</p> <p>Having VIEW access does not grant you access to all student records. To view judicial or health documents, you would have to request FSU_OB_EMT_RESTRICTED and FSU_OB_EMT_JUDICIAL in addition to VIEW.</p>
FSU_OB_EMT_SCANNER	<p>This role is restricted to internal users of Enrollment Management. This role allows users to scan and index documents.</p>
FSU_OB_EMT_RESTRICTED	<p>This role allows access to sensitive student data that may contain social security numbers, health, and judicial documents.</p>
FSU_OB_EMT_MANAGER	<p>This role is the equivalent of an administrator role in OnBase.</p> <p>This role is highly restricted as the user will have access to all documents.</p>
FSU_OB_EMT_JUDICIAL	<p>This role grants the ability to view judicial documents.</p>
FSU_OB_EMT_EMAIL_CFG	<p>This role is only used to configure the email imports for OnBase.</p>
FSU_OB_EMT_CCR	<p>This role grants the ability to view CCR documents, current and archived.</p>

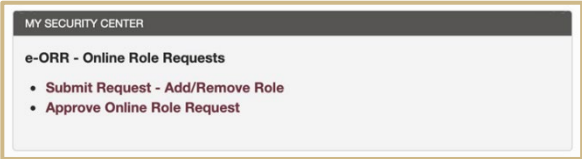
Requesting Roles

All security requests should be submitted through eORR. Instructions on how to request permissions are below.

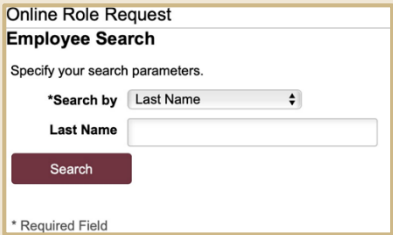
1. Log into my.fsu.edu and ensure the faculty/staff screen is displayed by selecting **Faculty & Staff** from the tile in the upper right corner of the page.



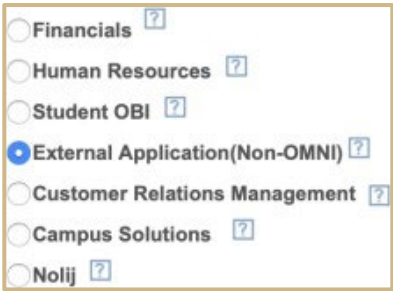
2. Navigate to **My Security Center**, which is located on the right side of the page as you scroll down.
3. Select **Submit Request - Add/Remove Role**



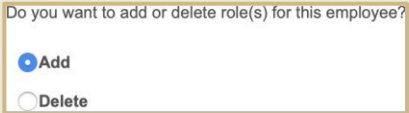
4. Use the **Employee Search** window to search for the user for whom you are requesting permissions.



5. OnBase roles will be located under **External Application(Non-Omni)**.



6. In the **Select Action** screen, select **Add** to add a new role to a user



7. In the **Select type of roles...** screen, select **Both** to view all the roles present for the application.



8. Scroll down until you see roles beginning with **FSU_OB_EMT_**. These roles belong to Enrollment Management Technology.

<input checked="" type="checkbox"/>	FSU_OB_EMT_CCR	OB EMT access to CCR
<input type="checkbox"/>	FSU_OB_EMT_EMAIL_CFG	OB EMT access to Email CFG
<input type="checkbox"/>	FSU_OB_EMT_JUDICIAL	OB EMT access to Judicial
<input type="checkbox"/>	FSU_OB_EMT_MANAGER	OB EMT Manager Access
<input type="checkbox"/>	FSU_OB_EMT_RESTRICTED	OB EMT access Restricted
<input type="checkbox"/>	FSU_OB_EMT_SCANNER	OB EMT Scanner Access
<input type="checkbox"/>	FSU_OB_EMT_VIEW	OB EMT View Access

To request the role, click on the checkbox next to the name, scroll down to the bottom of the page and click **Continue**.

- 9. On the next screen, be sure to enter your **Reason for Request** and **Justification** before clicking **Submit**.
- 10. The request will be routed to your supervisor for approval, then to the Enrollment Management Imaging and Security team for final approval.

The screenshot displays a web-based form titled "General Information". A dropdown menu is open over the "Reason for Request" field, listing options: "Change in Job Duties" (selected), "New Employee", "Other - Enter comments --->", "Termination", and "Transfer". The "Justification" field is empty. Other fields include "Request Status", "Department", and "Supervisor". On the right, there are fields for "Created On" (08/13/2020), "By" (BQV09), and "Last Updated". Below the form, a section titled "Following roles are already assigned to this employee in External Application(Non-OMNI) Application" lists several roles. At the bottom, a "Roles" table is visible.

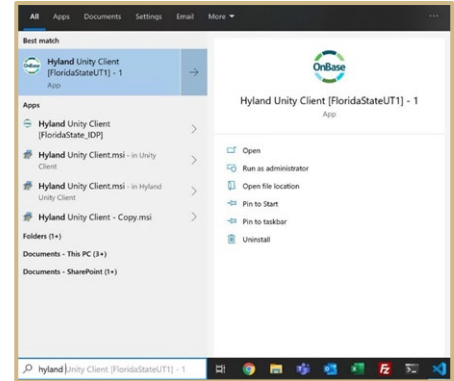
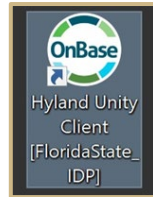
Role Name	Description
FSU_OB_FA_VIEW	OB FA View Access

Getting Started

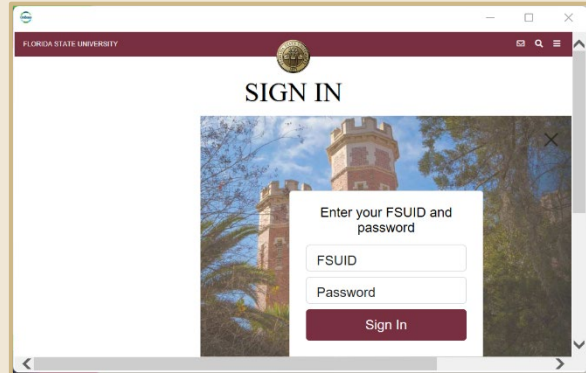
Logging into OnBase Desktop Client

1. Once OnBase has been installed and you have the proper permissions, you can log into OnBase.

To do so, you may either double-click on the shortcut on your desktop, or search for **Hyland** in your start menu.



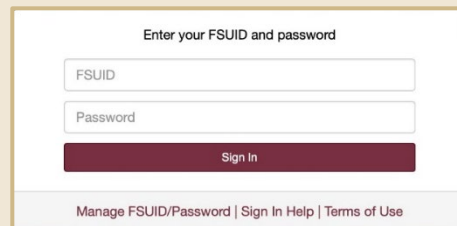
2. Once OnBase is open, you will be presented with a CAS login page. You will enter your FSUID and password to log in.



Logging into the OnBase Web client

1. Navigate to <https://floridastate.onbaseonline.com/1800IDP/> using any browser.

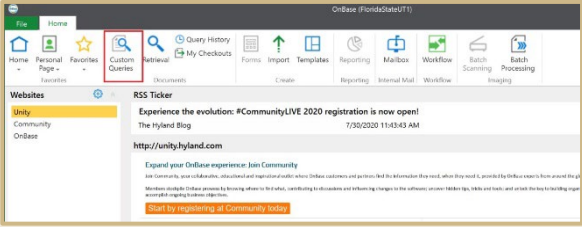
2. You will be presented with a CAS login page. You will enter your FSUID and password to log in.



Custom Queries

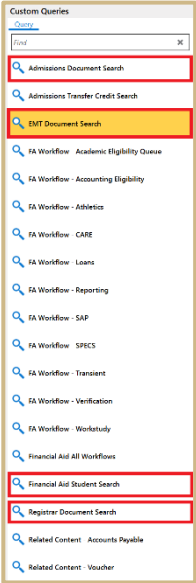
Custom queries are the primary way to locate student documents.

- 1. Click on **Custom Queries** in the navigation bar at the top of the page.



- 2. Select the query you would like to use. The most common queries are:

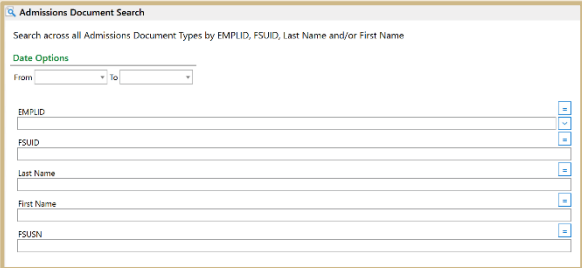
- Admissions Document Search**
Retrieves all ADM documents matching the search criteria.
- Registrar Document Search**
Retrieves all REG documents matching the search criteria.
- Financial Aid Student Search**
Retrieves all documents matching the search criteria.
- EMT Document Search**
Retrieves all documents (REG, ADM, and FA) matching the search criteria.



- 3. Fill in your search criteria to narrow down the students you would like to see.

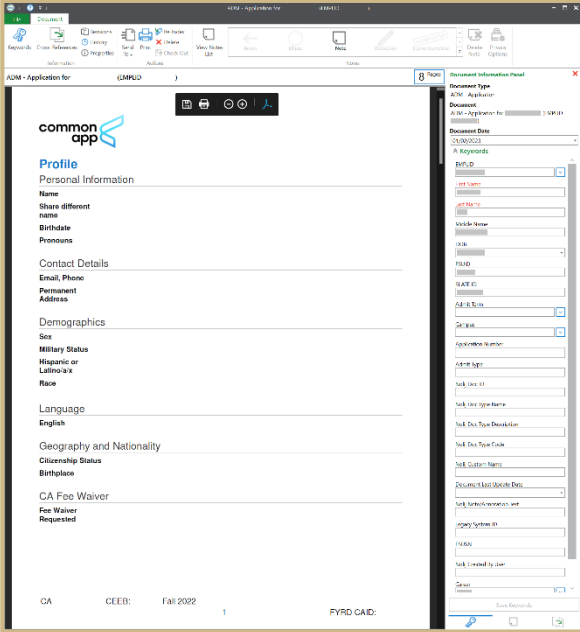
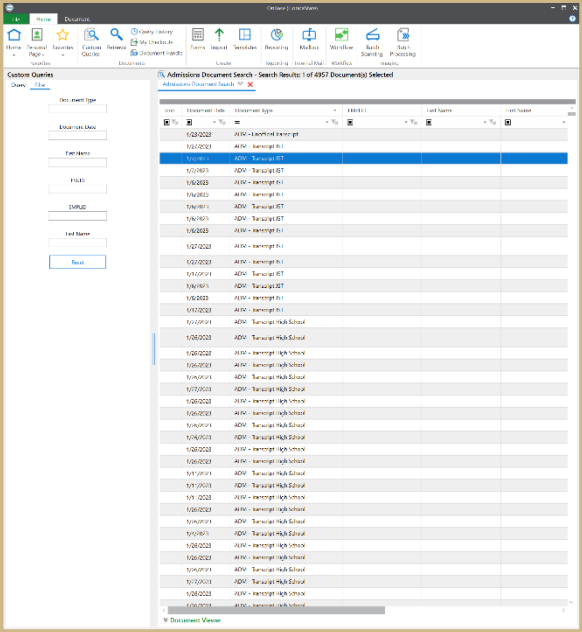
Note: Wild card searches can be completed by using the * symbol.

For example, to find all documents belonging to someone whose first name begins with “Ben” the user should enter **Ben*** in the First Name field.



Viewing Documents

Once you have used your custom query to find a set of documents. You can view the document by double clicking on it from the results list.

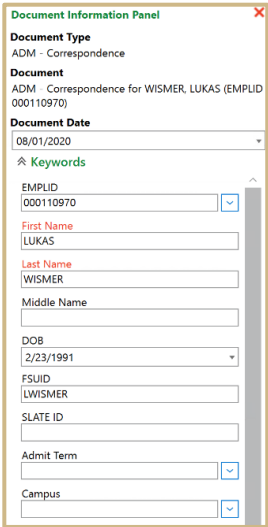


Keywords

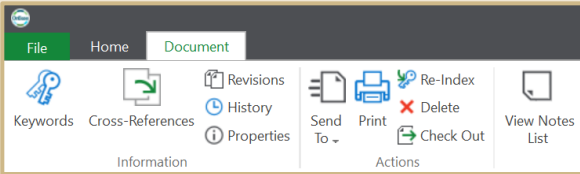
Keywords are an important identifier for all documents in OnBase.

A keyword is tied to a document and document type and defines the attributes of the document such as who the document belongs to, and when it was created.

Keywords in **red** are **required** keywords and are usually the primary identifier for the document such as EMPLID, FIRST NAME, LAST NAME.

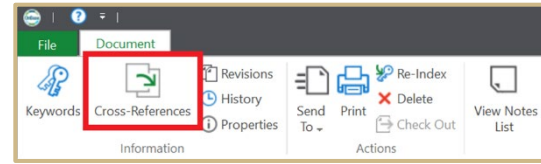


You can access the keywords for a document by clicking on **Keywords** on the top left corner of the window.



Cross Reference

Cross Referencing is an easy way to locate all documents that belong to a student. Once you have a document opened for one student, you can cross reference to locate all documents belonging to that student. You can view the other documents by clicking on **Cross-References** in the top left corner of the application.



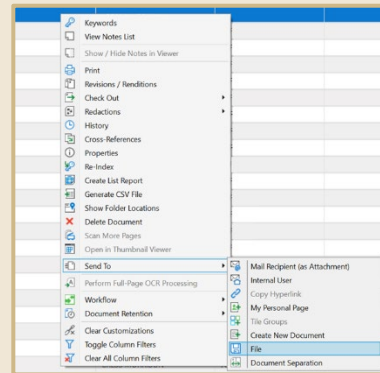
Downloading Documents

The SCANNER role is required to download documents.

To download the documents, begin by searching for the documents to be downloaded using either **Custom Queries** or **Document Retrieval**.

1. Select the document(s) you want to download. Right-click and navigate to

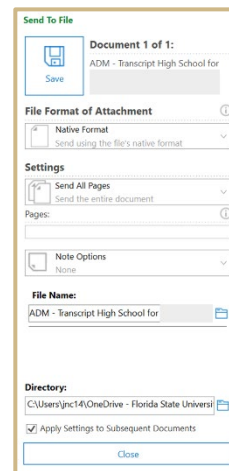
Send To > File.



2. A new pane will open on the right side of the application. Here you can set the options you want for the file download.

3. Select whether an encrypted or non-encrypted pdf is desired, the desired pages from the document to be downloaded, and the location where the file should be saved.

4. Continue to download the items by clicking the **Save** icon.



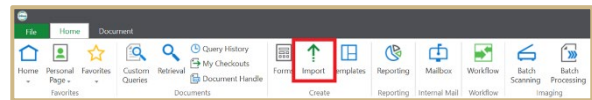
Importing Documents

There are multiple ways to import a document into OnBase. This document will cover the most common method, which is the **Import** function within the OnBase client.

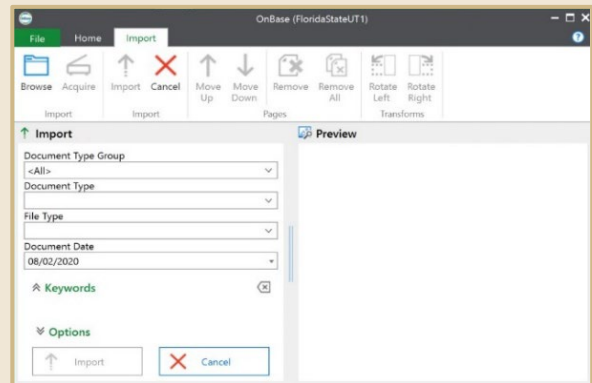
Importing a Document

1. Select **Import** from the top ribbon.

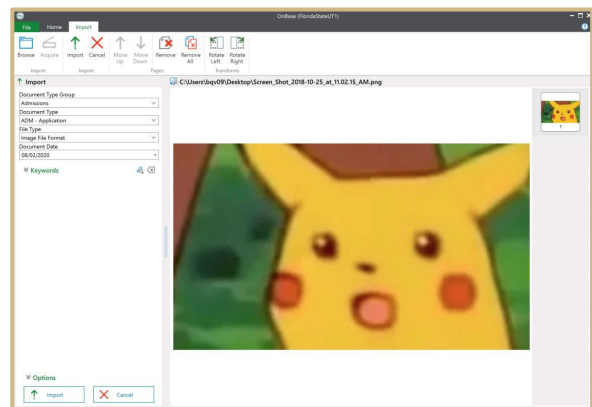
Note: Not all roles may have this functionality.




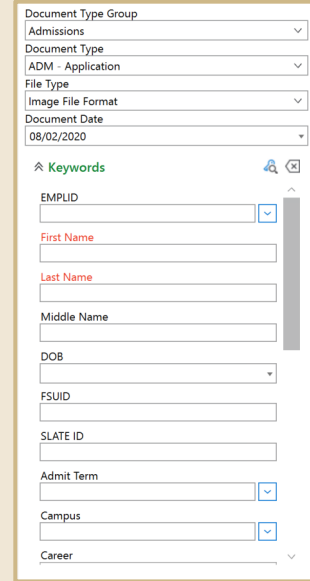
2. In the Import window, files may be dragged and dropped into the white space to begin the importing process. Alternatively, files may be selected by clicking on the **Browse** option and locating the file(s) to be uploaded.



3. Once you have selected a file to import, you will need to select the **Document Type Group** which will be **Admissions, Registrar, or Financial Aid**. **File Type** is automatically selected depending on the document uploaded and should not be changed.



- Next, the **Keywords** for the document must be entered. Keywords are only visible once the **Document Type Group** and **Document Type** are selected. To view the keywords, you will have to expand the **Keywords** pane ( Keywords)



The screenshot shows a form with the following fields:

- Document Type Group: Admissions
- Document Type: ADM - Application
- File Type: [Empty]
- Image File Format: [Empty]
- Document Date: 08/02/2020
- Keywords pane (expanded):
 - EMPLID: [Empty]
 - First Name: [Empty]
 - Last Name: [Empty]
 - Middle Name: [Empty]
 - DOB: [Empty]
 - FSUID: [Empty]
 - SLATE ID: [Empty]
 - Admit Term: [Empty]
 - Campus: [Empty]
 - Career: [Empty]

Remember that keywords in **red** are required. At minimum, the **First Name** and **Last Name** of the student associated with the document are required. Because any user can send us documents even if they are not an applicant, some users may not have an EMPLID. By making the first and last name mandatory, we can locate the documents in the future if/when they do become an applicant and receive an EMPLID.

Autofill Keywords

OnBase can autofill keywords during the import process. If the EMPLID is known, it can be entered to populate the other fields.

1. Enter the EMPLID into the **EMPLID** field to autofill the keywords.

EMPLID
000110970

First Name
LUKAS

Last Name
WISMER

Middle Name

DOB
2/23/1991

FSUID
LWISMER

SLATE ID

2. If the EMPLID is unknown, a search may be performed using the information available on the document.

Open the search page by clicking on the magnifying glass next to Keywords.

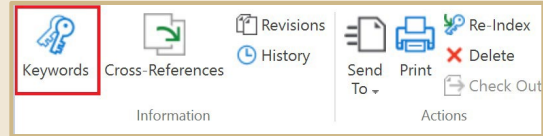


EMPLID	First Name	Middle Name	Last Name	FSUID
000110970	LUKAS		WISMER	LWISMER
202419849	CALISSEY	KINNE	WISMER	CRWNSC
202546999	JAMES		WISMER	
102117617	LEA	A	WISMER	
100072235	SAMUEL	W	WISMER	SWW18
100078207	MICHAEL		WISMER	

Updating Keywords

To update a keyword, you will need the permissions to re-index. This is associated with the **MANAGER** and **SCANNER** role.

1. Open the document you want to re-index. Open the keywords panel for the document by clicking on **Keywords** in the top navigation ribbon.



2. Update the keywords then click on **Save Keywords** to save your changes.

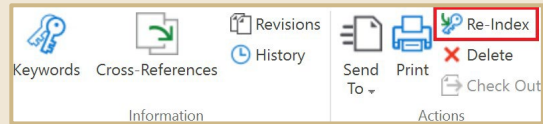
Legacy System ID

FSUSN

Nolij Created By User

[Save Keywords](#)

3. To change the document type, you will need to reindex the document.



4. This will open the keywords panel but will allow you to update the document type.

Re-Index

Document Type Group
Admissions ▼

Document Type
ADM - Change Form ▼

File Types
Image File Format ▼

Document Date
08/05/2020 ▼

5. Once you have updated the document type. Click on **Re-Index** to update the current document or **Split** to create a copy with the new set of keywords.

[Split](#)

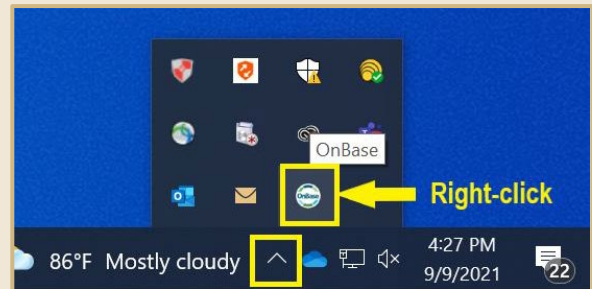
[Re-Index](#)
[Close](#)

Troubleshooting

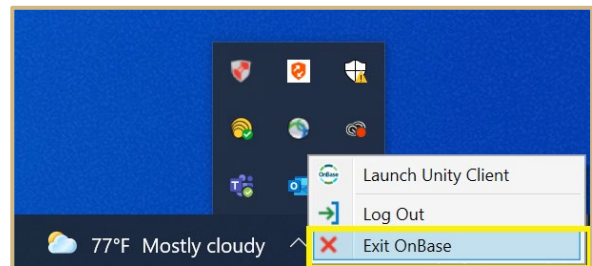
Exiting OnBase

The proper way to close OnBase to maintain optimal performance is by accessing the system tray at the bottom right corner of the screen.

1. Click the up arrow (^) to see the system tray and right-click on the OnBase icon.



2. Select **Exit OnBase** from the menu that appears.

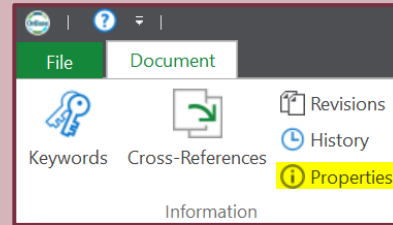


3. OnBase will now close properly.

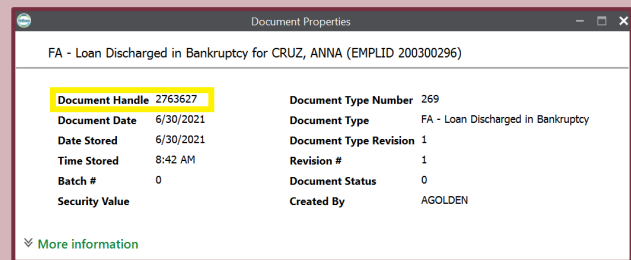
Document Handles

Each document in OnBase has a unique ID called a **Document Handle**, which may be used to search for a specific document.

The **Document Handle** displayed in a column in the **Custom Query** search results.



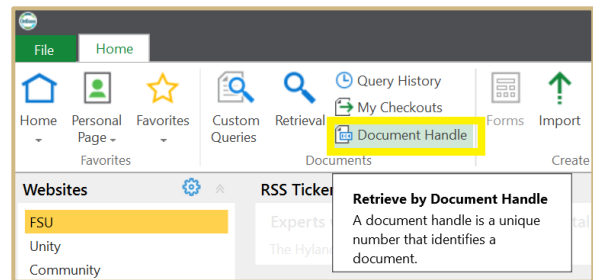
The **Document Handle** is also displayed in the **Properties** window inside the document.



If you encounter a problem with a document, contact Jordan Cress Morrison and Kevin Galutera with the Document Handle of the problem document.

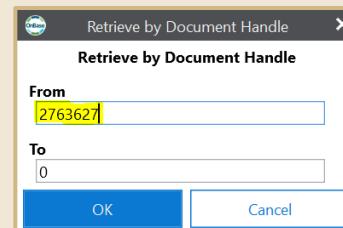
Search by Document Handle

- To search using the Document Handle, click the **Document Handle** button in the tool ribbon.



- Type the number in the **From** field and click **OK**.

The **To** field can be left at 0.



- The specific document will show in a **Retrieval** search results list and can be opened.

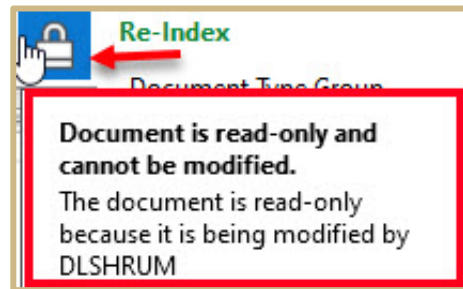
Locks

When a document is opened, it becomes locked for editing by the user who opened it.

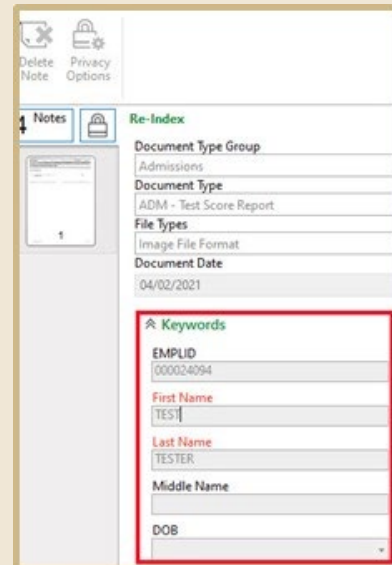
This section explains how to manage locked documents.

Managing Locks

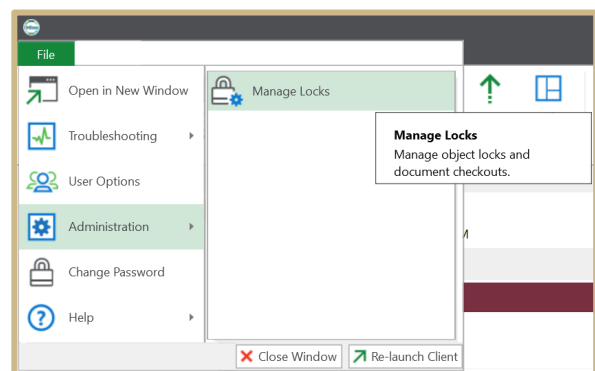
1. If you open a locked document, you will see a padlock icon at the top.
 - Hover over the lock icon to see who is modifying it.



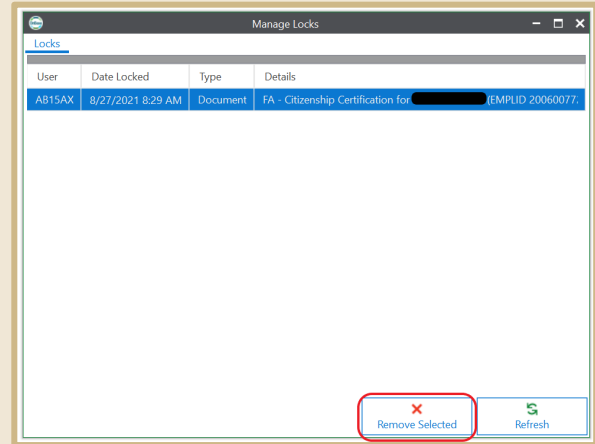
2. The keywords will be greyed out if you try to re-index it.
 - You can contact owner of the lock to unlock the document if you need to re-index it.



3. To unlock a document, simply close it.
4. Sometimes locks get stuck if OnBase is left idle for some time and a user logs in again, or if OnBase closes while a document is open.
5. To remove your own locks, go to **File > Administration > Manage Locks**.



6. Select the document(s) and click **Remove Selected**.
7. You can only see your own locks.



For additional assistance managing locks, please contact Jordan Cress Morrison or Kevin Galutera.