Importing & Indexing Documents in Outlook

If a document comes in via email, you can import it directly from Outlook, through Outlook Integration. Documents imported through Outlook can be indexed directly in Outlook.

You can import the email message, the message and any attachments, or just the attachment(s). When uploading multiple documents from one email, you will need to click the Upload button for each item.

1. Open the message in Outlook, and click the Upload icon on the OnBase tab in the ribbon. The Import Document pane opens on the right side of the Outlook window.

2. If you want to upload an attachment as a separate document from the email message, click the Attachments... button and select the attachment you want to upload.

3. In the Document Type Group field, select the appropriate document type group.

4. Select a Document Type. The Document Types vary, depending on the Document Type Group you selected in Step 3.

5. You can specify the File Type. OnBase will recognize many common file types, such as Office documents and PDFs, however, you may need to select the file type for less common files.

6. To index the document, enter values in the keyword fields that you want to associate with this document. Note that the email date comes in automatically, but you can change it if the attached document should have a different date.

7. Click the Upload button.

When uploading a message and its attachments as separate documents, you will need to click the Upload button for each. The keywords are carried over from the first item in the message, but you can change the values in any of the fields, as needed.

8. When all items in the e-mail have been uploaded or skipped, the Import Document pane is closed. The documents will appear in the appropriate folder for the student in OnBase.

The specific document (message or attachment) is indicated at the top of the pane. To select an attachment, click the Attachments button.

You may want to select a File Type

Select the Document Type Group then the Document Type

Enter the keyword values that will identify this document in OnBase searches.

Click to Upload

Note: A forwarded email is treated as a separate document when uploading attachments as separate documents. So if, for example, you have received an email from a student’s advisor forwarding an email with an attached letter from the student, you can upload

- all three items as one email message that includes the forwarded email and the attached letter with the email you received,
- all three items as individual documents by clicking Attachments and selecting all, or
- just the attached letter by clicking Attachments, selecting and uploading the letter, and skipping the remaining items.
Documents received in paper format can be scanned into OnBase either from an attached scanner, or from a copier set up for this purpose.

**To scan documents using an attached scanner:**
Navigate to **Processing > Scan/Index**, and double-click on the desired queue to activate the **Scan** button (below the keywords on the left). Then click on the **Scan** button to scan the document into the selected queue. Continue with “Indexing Scanned Documents”

### Scanning Documents from a Copier
When you scan documents from a copier set up for OnBase, they are scanned into a folder, which OnBase checks regularly. When it finds scanned documents there, it sweeps them as one batch into your OnBase queue, where you can index them.

**Note:** If you put a pile of documents into the sheet feeder and scan them all at once, they are treated as one document in OnBase. However, you can separate the documents later in OnBase, provided they were scanned as TIF images rather than PDF files (check the settings on your copier/scanner).

To make the documents available in OnBase without waiting for the automated sweep:

1. In OnBase, navigate to **Processing > Scan/Index**, and double-click on your scan queue (listed in the pane on the right).
2. Right click in the scan queue area, and select **Sweep Directory**. When prompted, click the **Sweep Directory** button.
3. On the Sweep Path Dialog box, verify that the default values are appropriate and click **OK**. On the verification dialog box, click **OK**.
4. When the new batch appears, index it as described below.

### Indexing Scanned Documents

1. In OnBase, navigate to **Processing > Scan/Index**, and click on **Scan Queues**. Your queue will be listed in the Scan Queue pane on the right.

2. Double-click on your queue in the Scan Queue pane. The batches in the queue will replace the queue name in the pane on the right.

3. Click on the batch you want to index, and then right-click on it and select **Index Batch**. The first un-indexed document will open in the pane on the right, unless it needs to open in a different application, such as Outlook, in which case it is opened in a new window.

4. In the keyword area on the left, select the **Document Type**. The applicable keywords will be displayed below the **Document Date**.

5. The **Document Date** defaults to today’s date. If that is not the date you want to associate with this document, type the correct day in **mm/dd/yyyy** format, or use the Calendar button to select the date.

6. Type values in the keyword fields.
7. Click on the Index button to index the document and open the next document.
8. Continue indexing until you reach the end of the batch, or if you need to stop in the middle of the batch, click the Stop Indexing icon below the keyword fields.

9. If your implementation is configured for full-text searching, the batch will be scanned for optical character recognition when you index the last document in the batch, and the OCR Status box will be displayed until the optical character recognition is completed. When it is done, the batch window is closed, and the batch **Status** changes to **Awaiting Commit**.

10. Click on the **Awaiting Commit** queue.

11. Double click on the batch to display the document list, and open each document to verify that it has been scanned and indexed correctly. Then return to the scan queue window by clicking again on the **Awaiting Commit** queue.

12. Click on the batch, and then right click on it, and select **Commit Selected**. When prompted to confirm, click OK. The batch is moved to the Committed queue, and you will be able to search for the documents based on the index keywords you applied.