How to Import Documents Into OnBase

Web Client

Click the hamburger menu ☰ in the upper left corner and select **Import Document**.
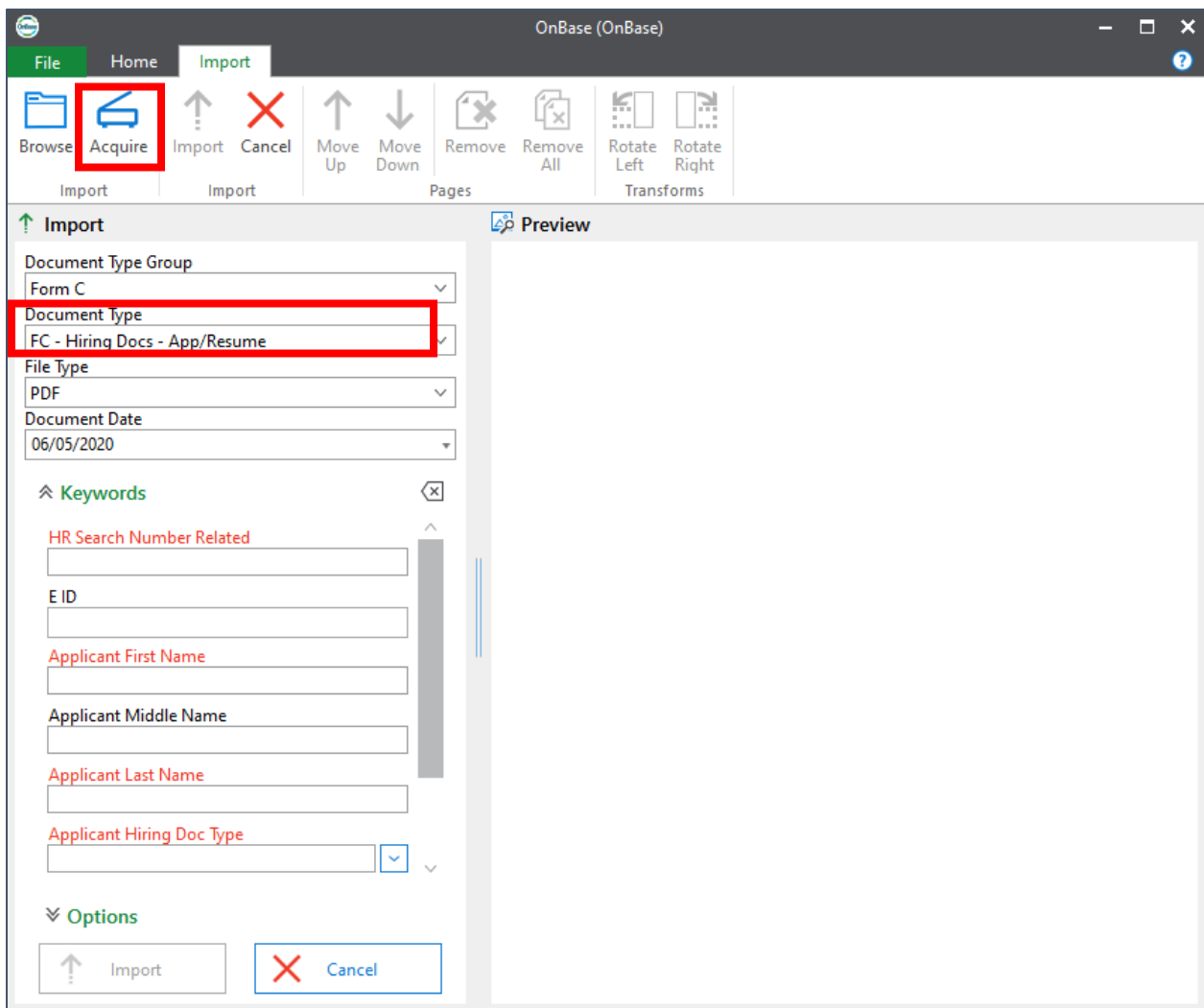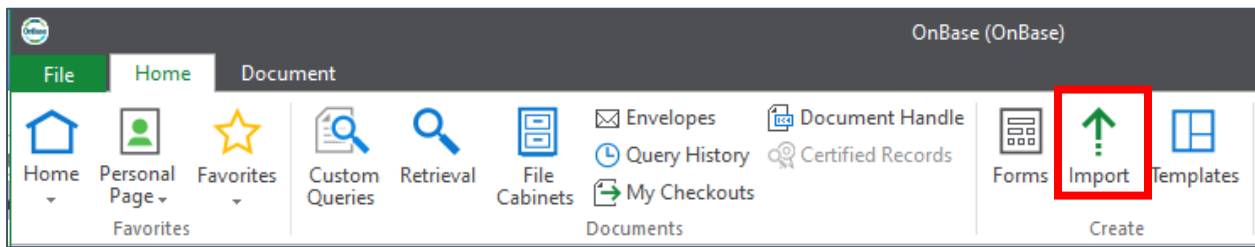

- **Browse** for a file OR **Drag & Drop**
- Select the **document type**
- Enter **keywords**, red are required. EID is always desired, but does not always exist.

Unity Client

From the Home ribbon, select **Import**.

Acquire is your new best friend it you need to scan paper. Just put the paper in your scanner and click Acquire. You will see a preview in the Preview pane and can select the document type and enter keywords on the left.

If a document exists on your computer, you can **Drag & Drop** it into the Preview Pane.

Click **Browse** to search for a document on your computer or shared files.
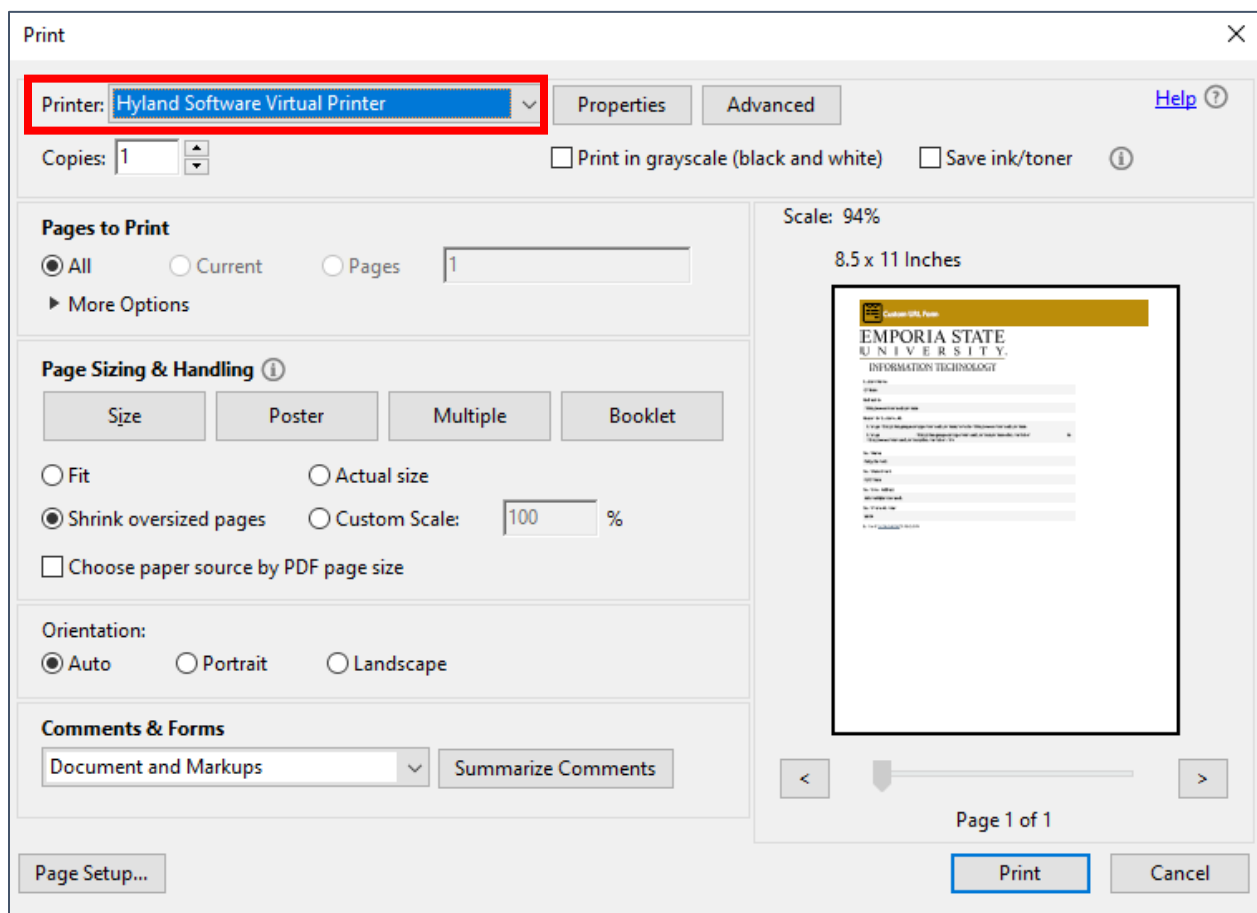
Hyland Virtual Print Driver (VPD)

The Hyland Virtual Print Driver is better than sliced bread if you have electronic files that need to be imported into OnBase. The following are required:

- VPD must be installed and is available here (click OK, double click setup.exe).
- Unity Client must be installed and open. (Check the bottom of this page for install instructions.)

Note: VPD stores documents as an image or multiple image pages. It will not be saved as a Word or PDF document.

Print your document, but instead of printing to your local or network printer, select **Hyland Software Virtual Printer**.

An **import window** will open, complete as before.
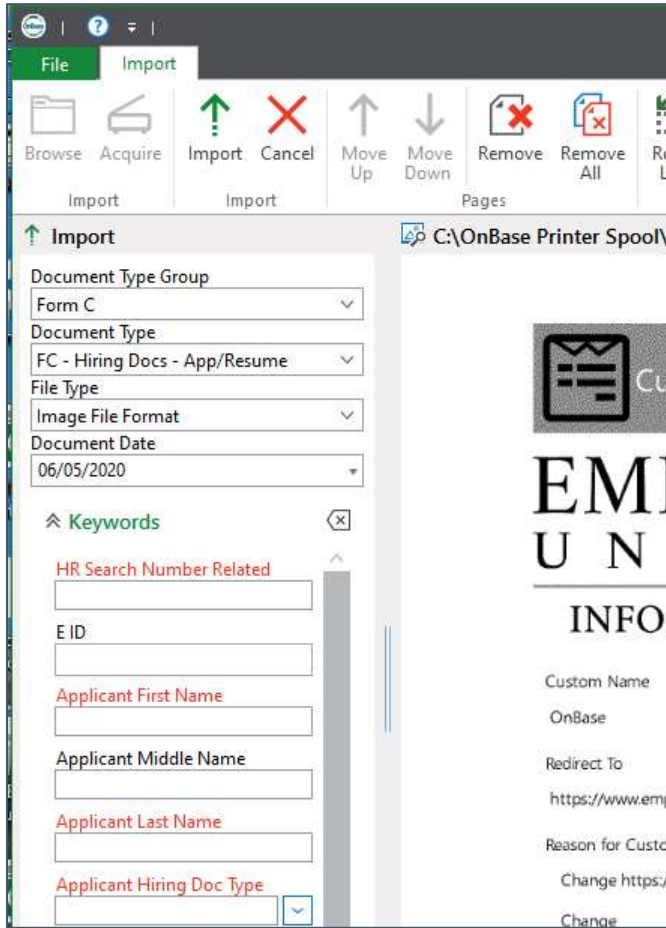
File Type Matters

If there is a reason to ensure a document is of a particular file type, the list below shows how to retain (or obtain) that file type:

- **Images** (.jpg or .tif)
  - VPD – Virtual Print Driver – Print your document using Hyland Software Virtual Printer as your printer. A dialog box will open to select document type and keywords. Unity Client must be open.
  - Using a scanner
    - Save to your PC, then import to OnBase
    - Using Unity Client, on the Import tab, use Acquire to scan directly from your scanner into OnBase (no need to save to your computer).

- **PDF**
  - Using the Import tab and select or drag and drop the file.
  - Please save outlook email as PDF, not MSG.

- **Word or Excel** (.docx, .xlsx)
  - Use the Import tab and select or drag and drop the file.

- **Video, Audio files** (mpg, pm4, mov…)
  - From the Import tab, select or drag and drop
  - Large files are not permitted.

Reasons a Particular File Type Might Be Desired

- **Images**
  - Allows document/page separation. More about Document Separation.
  - Can add more pages
  - Can have markups and redactions (add markings, text) on top of the image

- **PDF**
  - Generally not editable within OnBase.
  - Can't add pages
  - May print better using Chrome or Firefox (not IE11)

- **Word or Excel**
  - Retain features
  - Allow editing in that tool with OnBase Revisioning.