




ONBASE USER GUIDE



Walter, Erin

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Login

Sign in

Production - <https://onbaseweb.drexel.edu/AppNet/Login.aspx>

Test - <https://onbaseweb.irttest.drexel.edu/AppNet/Login.aspx>

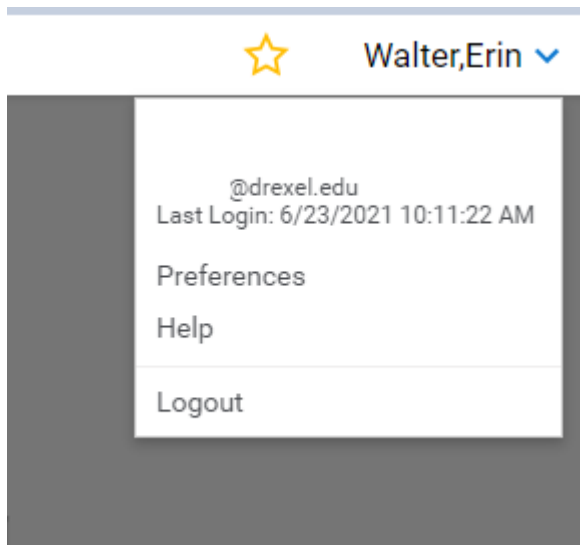


	<input type="text" value="DREXEL.EDU"/>
	<input type="text" value="User name"/>
	<input type="password" value="Password"/>

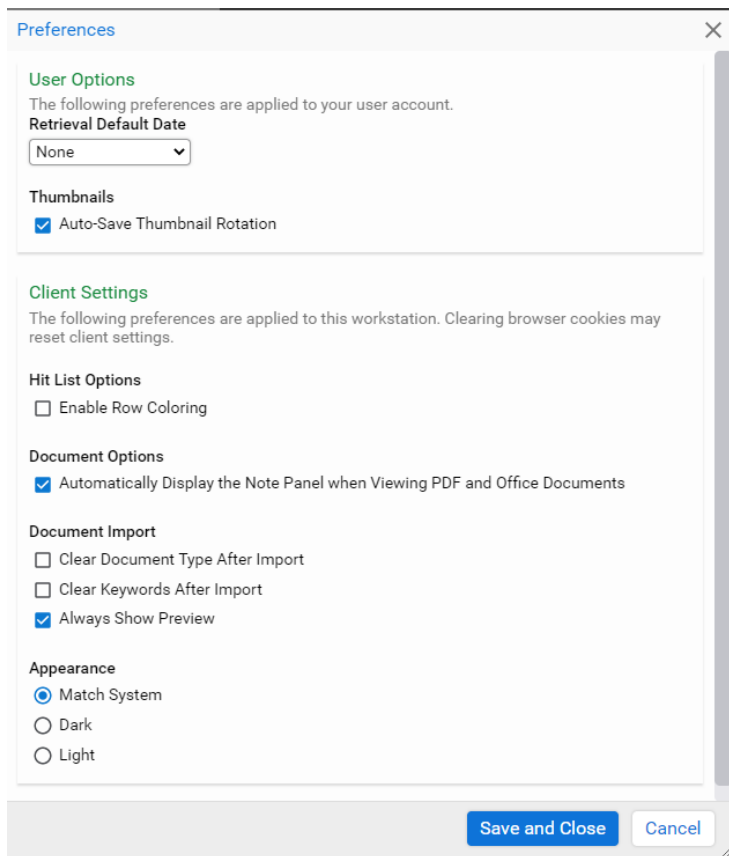
Login

Log Off

Click the carrot next to name in top right of browser window to display menu and click Log Off



User Preferences



Document Retrieval

Search By

Date



Ability to search by a specific date or range of dates based on the document date of the document. A specific date can be selected from the calendar icon

Select a Document Type Group. You will now see a list of Document Types for the selected Document Type Group.

Select the Document Type(s) to retrieve.

Enter a date range in the From and To fields.

Document Date

11/17/2021  — 11/17/2021  ▼

November 2021	▲	Today	▲
October 2021	■	Yesterday	
September 2021		Current Week	
August 2021		Previous Week	
July 2021		Current Month	
June 2021	▼	Year to Date	▼

Document Type / Keyword

A Keyword is an identifying piece of information used to locate documents stored within the electronic document imaging system.

Select a Document Type Group Select the Document Type(s) to retrieve

NOTE: If multiple Document Types are selected, only the common Keyword Types for those Document Types appear.

Enter a keyword value into one or more fields. The more information entered the more specific the search will be.

KEYWORD OPERATORS

The Keyword Type Edit Field default property = (equal to) will appear in a box on the right side of each Keyword Type Edit Field, and the default binary operator, AND will appear in a box on the right side of each Keyword Type Edit Field when multiple search fields have been activated for a Keyword in the Document Retrieval dialog box.

Student

To retrieve all documents in the system under a particular university ID, do not select any document type groups but instead adjust document date and enter the ID in the keyword field

Document Retrieval OnBase Walter,Erin

Document Types

AR - ACCOUNTS RECEIVABLE <

✓ FA - FINANCIAL AID <

LRC - LOANS, REPAYMENT, AND COLLECTIONS <

OUR - OFFICE OF THE UNIVERSITY REGISTRAR <

SCDC - STEINBRIGHT CAREER DEVELOPMENT CENTER <

SCDC - Career Services Document

SCDC - Clinical References Document

SCDC - Coop Reg and ESP Document

72 SELECTED

Document Date: 11/17/2021 - 11/17/2021

Search Type: KEYWORDS NOTES

University ID =

UserID =

Last Name =

First Name =

Middle Name =

Date of Birth =

MM/dd/yyyy

PIDM =

Separation Date =

MM/dd/yyyy

Search

i

Nothing to display

You may search by Department, clicking the heading FA-FINANCIAL AID would allow you to search all the document types within that department OR you may click the carrot arrow on the right side to expand the list to select only certain document types

Document Types

AR - ACCOUNTS RECEIVABLE <

FA - FINANCIAL AID < ✓

✓ FA - ACADPL

FA - Appeal Letter

FA - Appeals-Other

FA - Archived

FA - Archived Award Letter

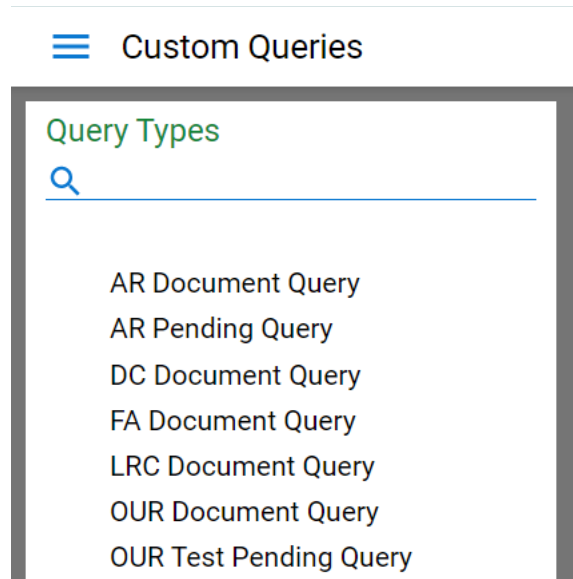
✓ FA - ATHLCN

FA - Award Letter

2 SELECTED

Custom Queries

A Custom Query can be developed to allow users to more easily retrieve documents that exist within OnBase. This allows the user to find the specified documents using a pre-defined form and limits the criteria needed to perform the search.



AR Documents Query - searches all AR in doc types by ID, First Name or Last Name for all of time

AR Pending Query – searches for all AR doc types where DC Status is Pending

DC Document Query – searches all docs in depts of AR, FA, OUR doc types

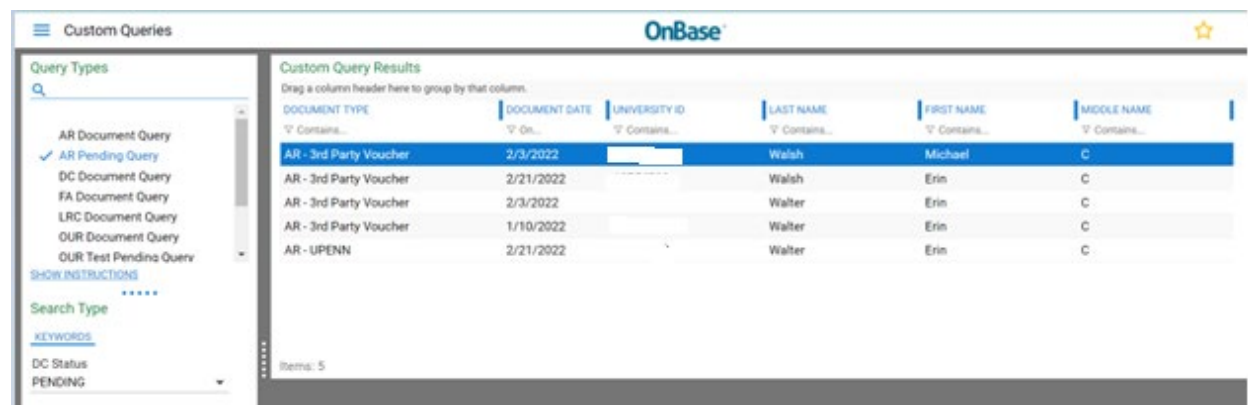
FA Document Query - searches all FA in doc types by ID, First Name or Last Name for all of time

LRC Document Query - searches all LRC in doc types by ID, First Name or Last Name for all of time

OUR Document Query - searches all OUR in doc types by ID, First Name or Last Name for all of time

OUR Pending Query – searches for all OUR doc types where DC Status is Pending

Example of Custom Query



Filter on Search Results

▽ Contains...

Custom Query Results

Drag a column header here to group by that column.

DOCUMENT TYPE	DOCUMENT DATE	UNIVERSITY ID	LAST NAME	FIRST NAME	MIDDLE NAME
AR - 3rd Party Voucher	2/		Walsh	Michael	C
AR - 3rd Party Voucher	2/		Walsh	Erin	C
AR - 3rd Party Voucher	2/		Walter	Erin	C
AR - 3rd Party Voucher	1/		Walter	Erin	C
AR - UPENN	2/		Walter	Erin	C

Items: 5

Group Results Layout

You may click and drag a column head to group by that column.

Custom Query Results

Drag a column header here to group by that column.

DOCUMENT TYPE	DOCUMENT DATE	UNIVERSITY ID	LAST NAME	FIRST NAME	MIDDLE NAME
First Name: Erin (4)					
First Name: Michael (1)					

Double click to add search functions (OR) (AND)

In a search of keywords you can double click on keyword to add functions. You may also click on end to change search operators.

Search Type

KEYWORDS

University ID	<>
_____	AND
University ID	=
_____	OR
University ID	=

Last Name	" "

First Name	<>

Middle Name	" "

Clear Search



This button will clear any keywords in the search used

Wildcards

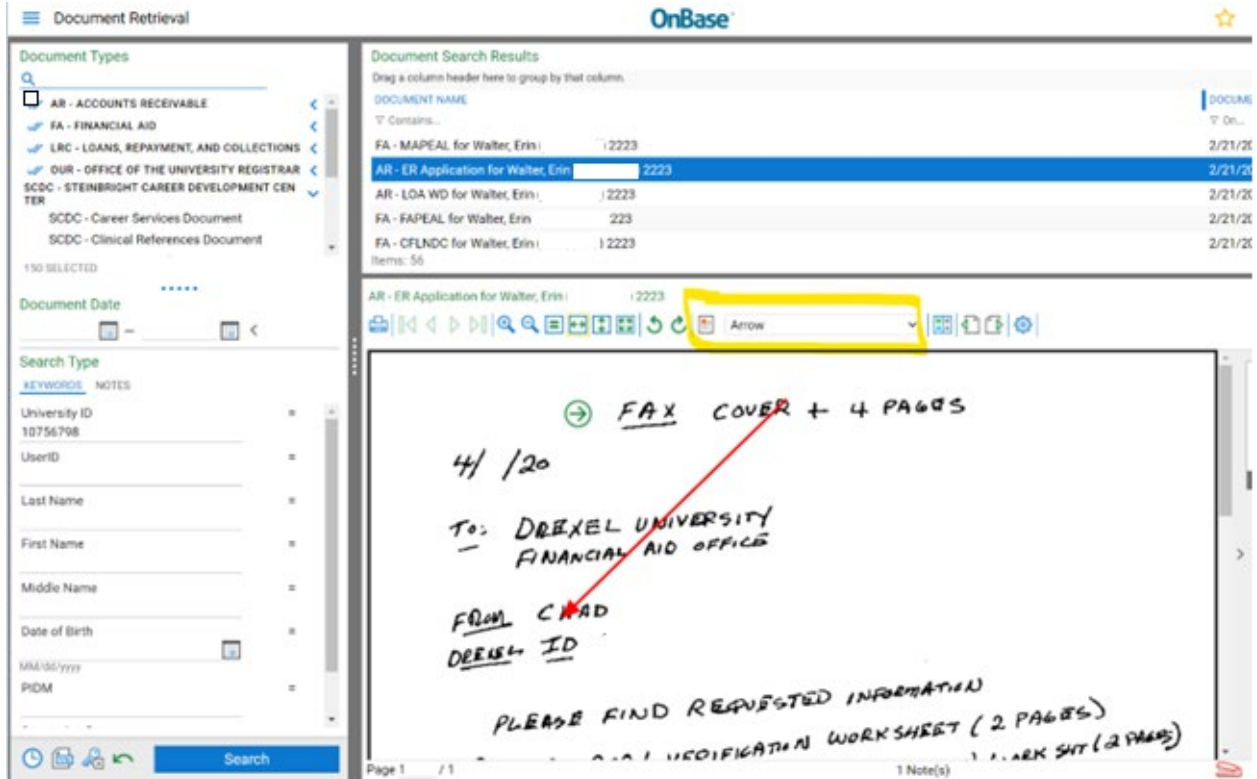
Combined with keyword values can be used to retrieve documents.

- * Replaces multiple characters (ADAMS* would retrieve ADAMS, ADAMSON, ADAMSTON, etc.)
- ? Replaces a single character (SM?TH would retrieve SMITH, SMYTH, SMOTH, etc.)

Highlight, Annotate, Notes

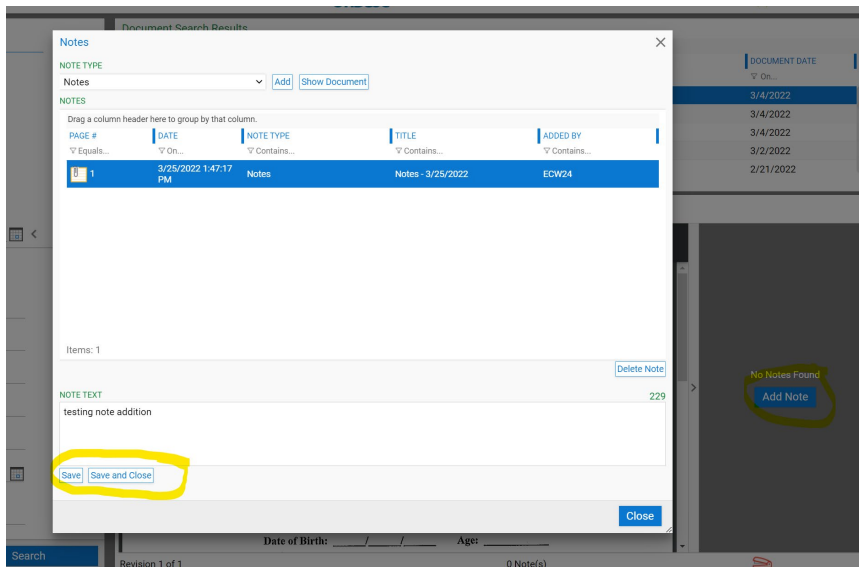
Add highlight, circle, arrow, redaction etc.

One documents that are images, you may add some annotations to highlight or draw attention to specific information within the document. To add highlight, circle, arrow etc., you can select the appropriate item from the drop down and then hit the toggle annotation to the left of drop down to click and draw on the document.



Add notes

To add note to a document you are viewing, select the Add note button on right hand side of document. The following box will appear. You can add searchable text to the note text box. Hit Save or Save and Close to save the note onto the document.



If you Click Show Document, you can view the document at the same time you are adding notes.

The screenshot displays a software interface for document retrieval. On the left, a 'Notes' panel shows a table of notes with columns for Page #, Date, Note Type, Title, and Added By. Below the table is a 'NOTE TEXT' area containing the text 'testing note addition'. On the right, a 'Hide Document' window shows a preview of a form titled 'Administration of Medication' from Stratford School District. The form includes fields for patient information, medication details, and signature lines for the physician and parent/guardian.

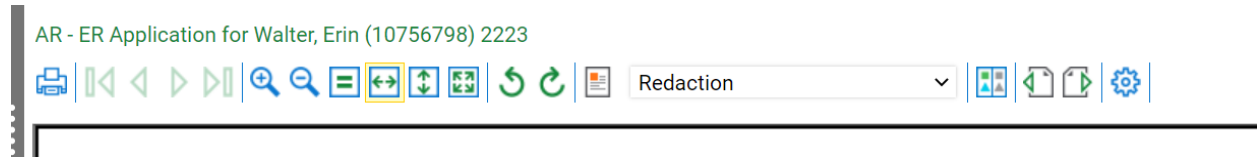
Note Search

In document retrieval, you may also search for documents in a group by a particular note type. You can search by words used in notes, with date range or different types of annotations applied to documents.

The screenshot shows a 'Document Retrieval' search filter panel. It includes a search bar, a list of document types (e.g., AR - ACCOUNTS RECEIVABLE, AR - 3rd Party Voucher), a 'Document Date' range selector, and a 'Search Type' section. The 'Search Type' section has tabs for 'KEYWORDS' and 'NOTES'. Under 'NOTES', there are input fields for 'Note Text' (containing 'test') and 'Created on'. A dropdown menu for 'Note Types' is open, showing options like '<Any>', Arrow, Back Staple, Circle, Highlight, Notes, Pending Automated Redaction, Redaction, and Staple. A 'Search' button is at the bottom.

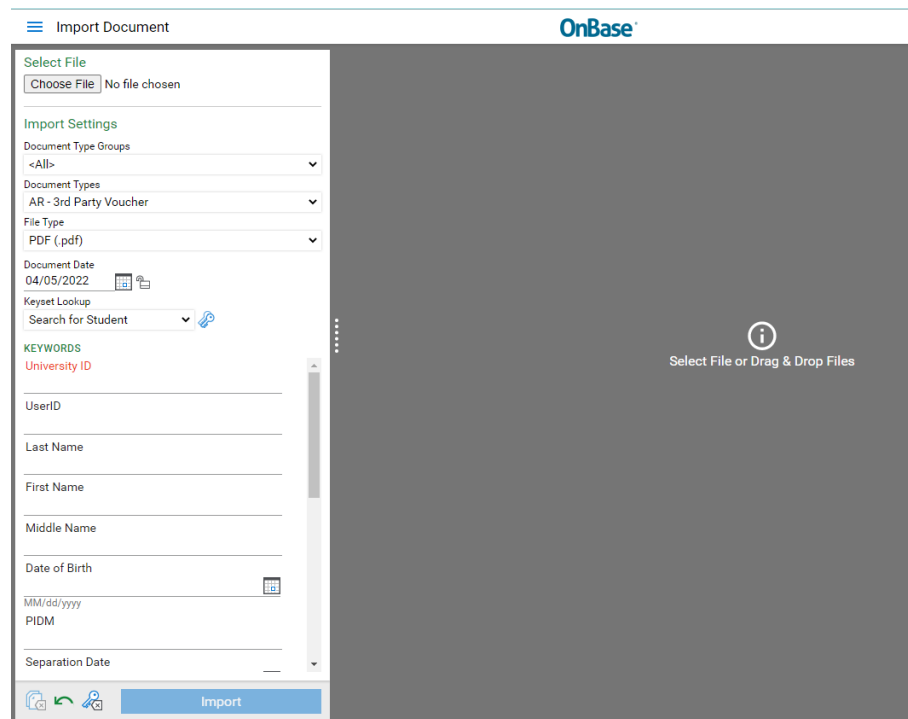
Working with Images

Rotation, Zoom, Previous/next page



Import Document

Clicking on hamburger button you can see Import Document from the menu.



Add file

You can use the choose file button to select the file from your computer or you may drag and drop file to right hand side.

Import Settings

You must select Document Type Groups first, this is the department the file should belong to. The second dropdown is for the document types under that group. These are the indexes. The file type will update depending on file you load, same as Document Date which defaults to today's date.

Keywords

In this section, you will add the specific information you need for the student and the document. University ID is required. If you know the University ID you can type in the field and hit TAB or click on to next keyword for the student autofill to fill in remaining data for the student.

Certain document types require more keywords to be filled in (ie. OUR documents have an additional keyword for DC Status which needs to be set as PENDING for new documents. AR 3rd Party Vouchers for example include required keywords as AID Year, Company and DC Status.)

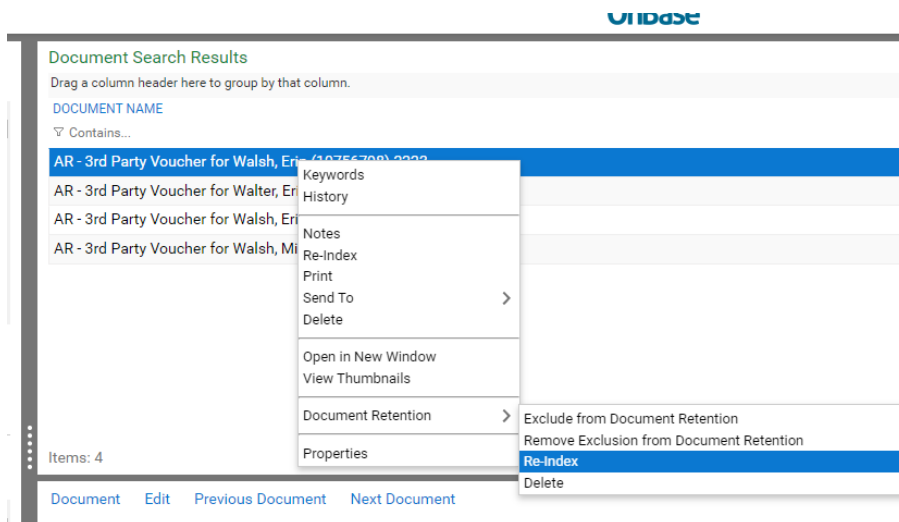
Once all information is filled in, you can click IMPORT button which will add it to the students record in OnBase.

LOOKUP STUDENT

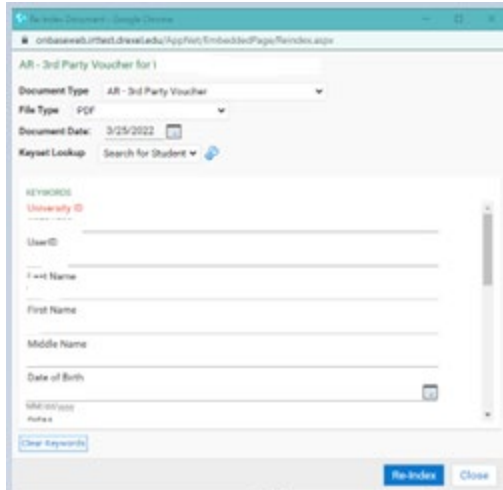
The option to look up a student in the keyset Lookup field. Click on the key next to dropdown to show the new window allowing you to search for ID with Last Name, First Name etc.

Re-Indexing Doc

If you are reviewing a document and find it has an error in document type or keyword, you may right click and Navigate to the Document Retention > Re-Index or the RE-INDEX menu item.



It will open the keyword window on the side.



The dropdown under document type will show all document types you have access to re-index. You can choose a new document type and this will re-index the document to the appropriate location. You may also update if the wrong student ID was added to the document or update any other keywords to correct the information and hit RE-INDEX button on bottom to save changes.

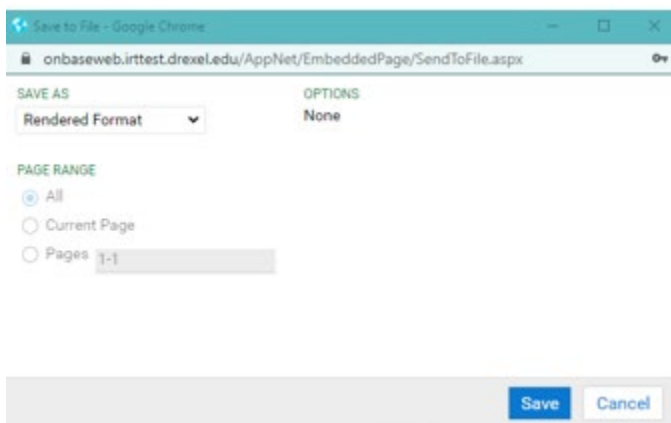
Saving/Printing

Print documents

Once on a document you may right click to see menu for the document and select PRINT. This will bring the print page window. In viewing the document, you can also PRINT using the icon in the ribbon or on the Image/Document menu.

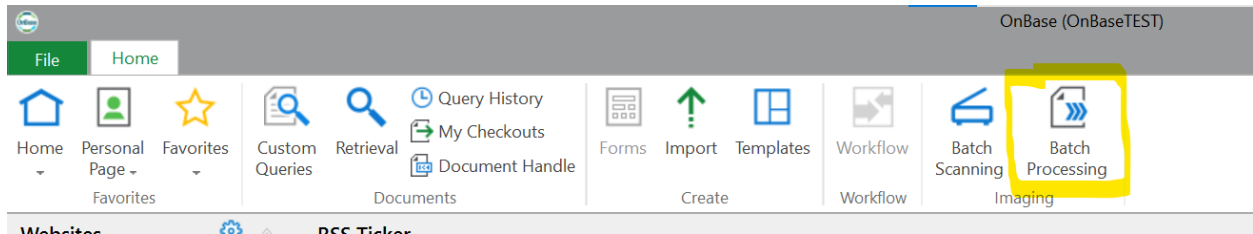
Save to desktop/download

Once on a document you may right click to see menu for the document and select SEND TO > FILE. This will bring the SAVE AS window.



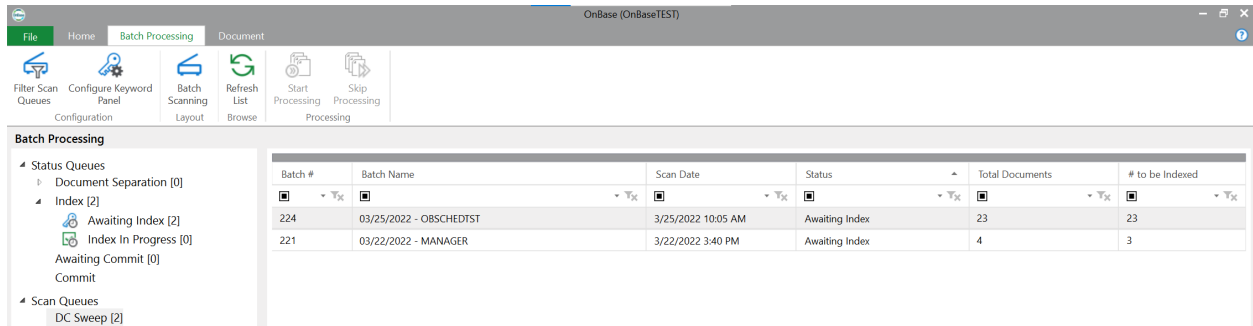
This will save the document as a download to your computer.

(CLIENT) Batch Processing

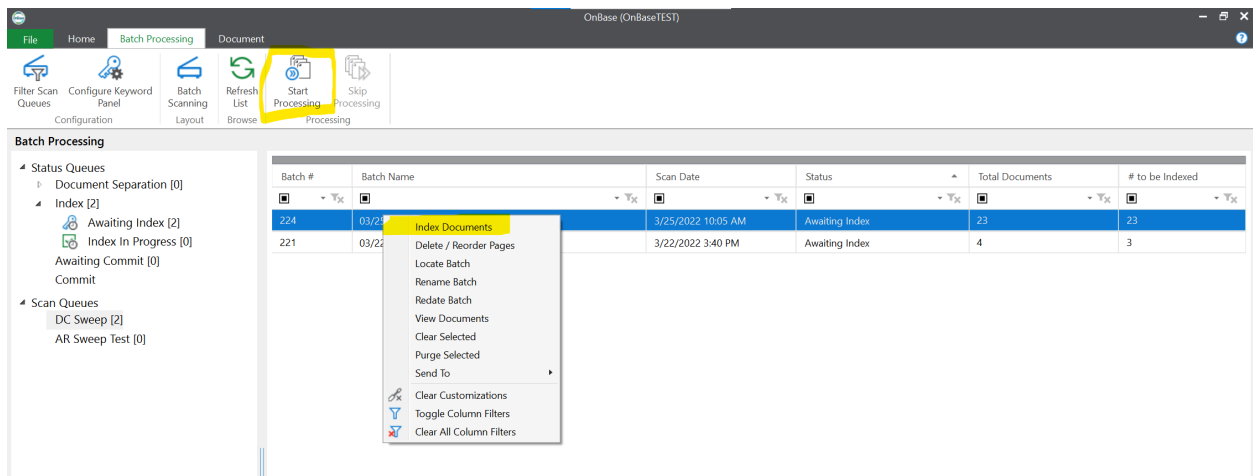


Select the Batch Processing icon from the Imaging section of the ribbon.

Double Click on Scan Queue – DC Sweep



On the right hand side you will see the batches awaiting indexing. To start indexing a batch, right click on batch in list and select Index Documents from the dropdown OR select a batch and click on the Start Processing Icon in Processing section of the ribbon (highlighted in yellow below)



Batch Indexing

Once in the batch, the window will display the first document to review on the right and the left side will have the document information you need to enter.

Document Type Group

Document Type

Document Date
03/30/2022

Keywords

Batch Name: 03/25/2022 - OBSCHEDTST(224)

Unindexed Document 11 Pages

Department of Veterans Affairs

NOTICE TO SURVIVOR OF EVIDENCE NECESSARY TO SUBSTANTIATE A CLAIM FOR DEPENDENCY AND INDEMNITY COMPENSATION, DEATH PENSION, AND/OR ACCRUED BENEFITS

(This notice is applicable to survivors claims for: Death Pension • Dependency Indemnity Compensation (DIC) • DIC under 38 U.S.C. 1151 • Increased Survivor Benefits Based on Need for Aid and Attendance or Being Housebound • Accrued Benefits • Benefits Based on a Veteran's Seriously Disabled Child)

Use this notice and the attached application to submit a claim for DIC, Death Pension, and/or Accrued Benefits. This notice informs you of the evidence necessary to substantiate your claim.

Want your claim processed faster? The Fully Developed Claim (FDC) Program is the fastest way to get your claim processed, and there is no risk to participate! To participate in the FDC Program if you are making a claim for DIC, Death Pension, and/or Accrued Benefits, simply submit your claim in accordance with the "FDC Criteria" shown below. If you are making a claim for veterans disability compensation or related compensation benefits, use VA Form 21-526EZ, *Application for Disability Compensation and Related Compensation Benefits*. If you are making a claim for veterans non service-connected pension benefits, use VA Form 21-527EZ, *Application for Pension*. VA forms are available at www.va.gov/vaforms.

FDC Criteria (Claim(s) for DIC, Death Pension, and/or Accrued Benefits)

1. Submit your claim on a signed and completed VA Form 21P-534EZ, *Application for DIC, Death Pension, and/or Accrued Benefits (Attached)*.
2. Submit simultaneously with your claim:
A copy of the veteran's Death Certificate (unless he or she died on active duty); **AND**
if claiming death pension:
 - All necessary income and net-worth information
 - **If claiming death pension with increased survivor benefits**, a completed VA Form 21-2680, *Examination for Housebound Status or Permanent Need for Regular Aid and Attendance*, and a completed VA Form 21-0779, *Request for Nursing Home Information in Connection with Claim for Aid and Attendance***if claiming DIC:**
 - All, if any, relevant, private medical treatment records and an identification of any relevant treatment records available at a Federal facility, such as a VA medical center, that support your claim
 - Any and all Service Treatment and Personnel Records in the custody of the veteran's Guard or Reserve Unit(s)

You will select the Document Type Group and the Document Type for this document from the dropdown. In doing so, keywords required each document will display in lower section of left hand side.

Keywords in red are required. Depending on the document type selected, different keyword fields may be required. (IE. All OUR documents required the DC Status of Pending, AR doc type 3rd Party Voucher includes Aid Year, DC status and Company to be entered)

Batch Indexing | Scan Queue: DC Sweep

Document Type Group
FA - Financial Aid

Document Type
FA - Veterans Benefit Request

Document Date
03/30/2022

Search for Student

Keywords

University ID

Aid Year

UserID

Last Name

First Name

Middle Name

Date of Birth

Index Append [Icons] Scan [Icons] Undo [Icon]

Number of Documents: 23, 1 of 23 (Remaining)

Status	Documents
	Unindexed Document
	Unindexed Document
	Unindexed Document
	Unindexed Document
	Unindexed Document

Enter the University ID in the keyword field and hit TAB to have the student information autofill. You May also use the Search for Student button to look up id by Last Name, First Name or User ID. Double click or use the Choose this Student button to select the id to go back on keyword pane for indexing the document.

Search for Student by UserID or Name

Keywords

UserID

Last Name

First Name

Middle Name

Search for a Student without knowing their University ID

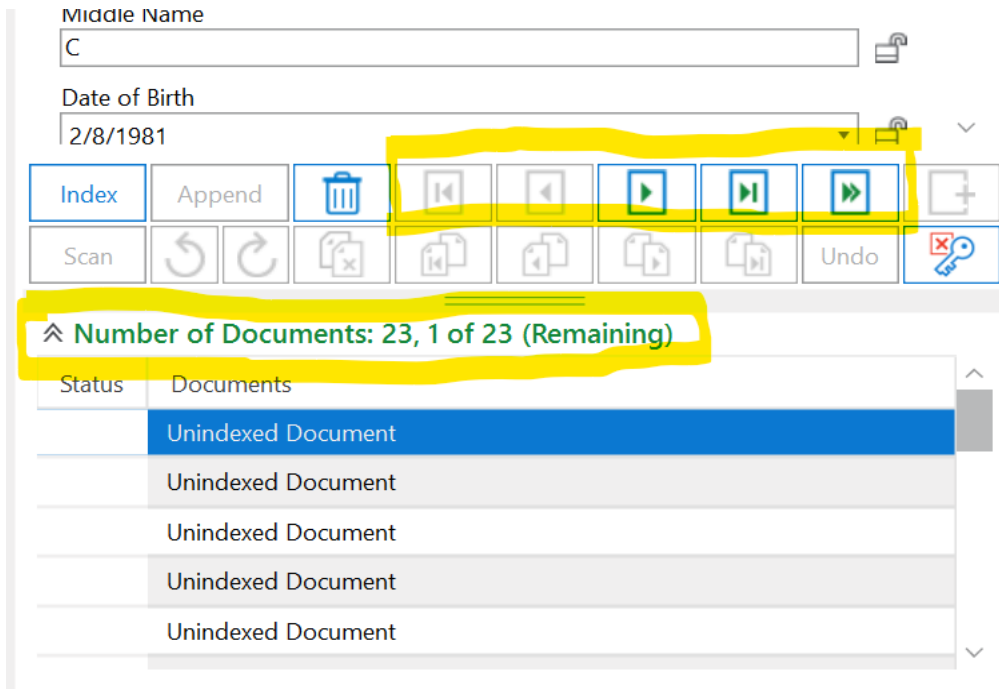
Clear End

Results

University ID	UserID	Last Name	First Name	Middle Name	Date of Birth
		Walenczyk	Erin	A	
		Walker	Erin	Leann	
		Walker	Erin	C	
		Walker	Erin	Elizabeth	
		Walker Smpoor	Erin		
		Walklet	Erin	M	
		Wall	Erin	J	
		Wallace	Erin	E	
		Wallace	Erin	M	
		Walsh	Erin	Michelle	
		Walsh	Erin	C	
		Walsh	Erin		
		Walsh	Erin	M	
		Walsh	Erin	Theresa	
		Walsh	Erin	Kathleen	
		Walter	Erin		
		Walter	Erin	G	
		Walter	Erin	E	
		Walworth	Erin		
		Walton	Erin	D	

Select

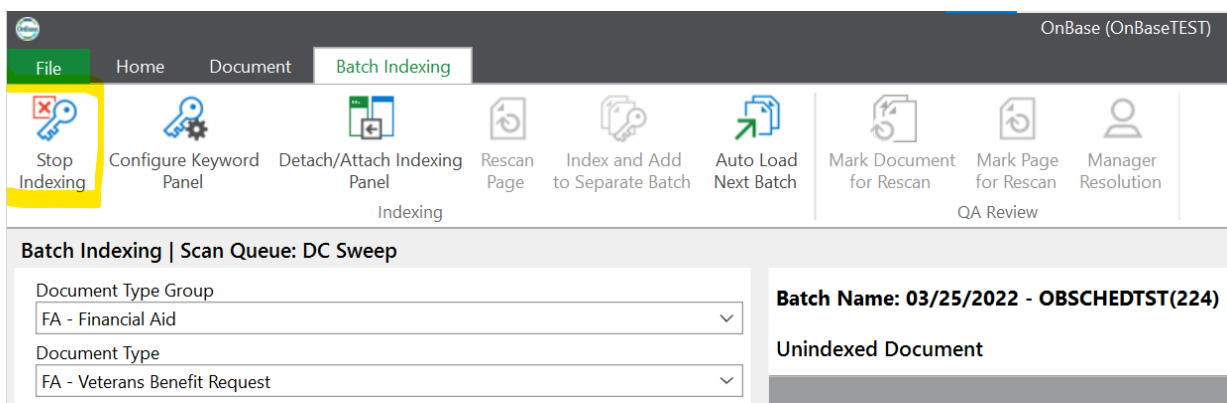
In the indexing pane on left hand side you can see the list of documents within the batch, how many remaining or click through list to go to specific document. You can also use the buttons in the toolbar to navigate.



Once all the data is filled in, you click Index button in toolbar to move to next document. If the document needs to be discarded, click the trash can icon. There are also rotate page buttons if document was scanning in upside down etc.

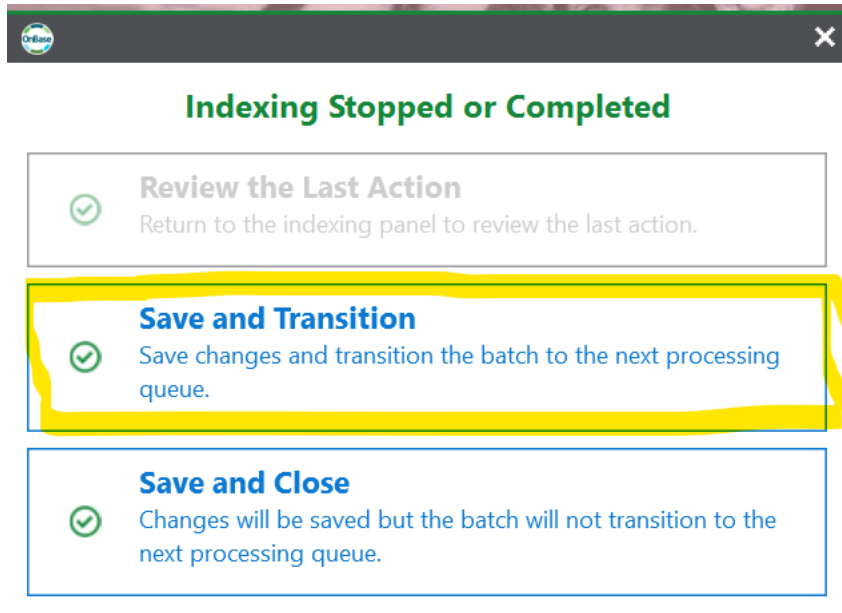
Stop Indexing

You may stop indexing a batch at anytime using the Stop Indexing button in the ribbon. This will allow others to go in that batch or to continue at another time.



Completing Batch Indexing

Once the batch is totally worked, you can Save and Transition this batch to final step which is an auto-commit.



(WEB) Batch Processing

Batch Indexing

OnBase

Walter, Erin

Batch Statuses

INDEX

- ✓ Awaiting Index (3)
- Index in Progress (0)

COMMIT

- Committed

Awaiting Index (3)

Drag a column header here to group by that column.

SCAN QUEUE	BATCH #	BATCH NAME	SCAN DATE-TIME	TOTAL DOCUMENTS	# TO BE INDEXED
DC Sweep	221	03/22/2022 - MANAGER	3/22/2022 3:40:45 PM	4	3
DC Sweep	223	03/25/2022 - OBSCHEDTST	3/25/2022 9:03:17 AM	6	6
DC Sweep	224	03/25/2022 - OBSCHEDTST	3/25/2022 10:05:09 AM	23	23

Indexing batches of documents

Right click on a batch and select Index documents. It will open first document and indexing pane on left

Batch Indexing OnBase® Walter,Erin

Batch # 223

Document 1 of 6

DOCUMENT TYPE
-Select Document Type-

DOCUMENT DATE
03/25/2022

KEYWORDS
There are no keywords available for this document type.

Document Edit

bwszkadvf.P_RCGPAPValid... 1 / 2 98%

DREXEL UNIVERSITY
Office of the
University Registrar
Drexel Central
Telephone: 215.895.1050
Fax: 215.895.0540
Email via ask@drexel.edu
drexel.edu/registrar

Petition for GPA Adjustment for Repeated Courses
Undergraduate Student Instructions

Students may repeat courses at Drexel University consistent with this policy. The University calculates a single, unified grade point average (GPA) for all courses taken at the University. All grades from original and repeated course enrollments are averaged into the cumulative GPA unless the petition for a GPA adjustment for repeat courses for undergraduate students is approved. Only the credits earned from the first time a course is completed with a passing grade will be included in a student's earned hours and passed hours.

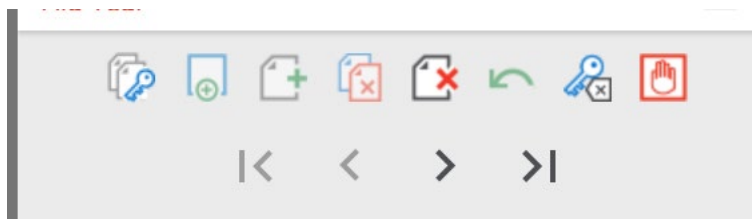
Undergraduate Guidelines for the GPA Adjustment Petition Option

Undergraduate students who wish to repeat courses using the petition option may do so under the following conditions:

- This policy applies only to courses taken at Drexel University.
- The earliest attempt resulting in a grade of "C-" or lower must have been taken during or after fall quarter of the 2016-2017 academic year.
- A student may not petition for a GPA adjustment for a course taken after degree conferral.
- A student must be enrolled in the second course attempt by the end of the add/drop period for the term of repetition.
- The petition for GPA adjustment must be submitted by the second week of the term of repetition.
- A student may appeal for a GPA adjustment only once for a specific course.
- A student may not exceed four repeated courses using this petition option.
- Course withdrawals (W grade), incomplete courses (INC grade), and courses completed as Credit/No Credit (CR/NCR grades) are not eligible for adjustment petition.
- A student's grade in the original course may not be a result of academic misconduct as documented through the Office of Residential Living and Student Conduct.
- All occurrences of the course along with associated grades will remain on the student's academic record as well as on the official transcript.

Revision 1 of 1 0 Note(s)

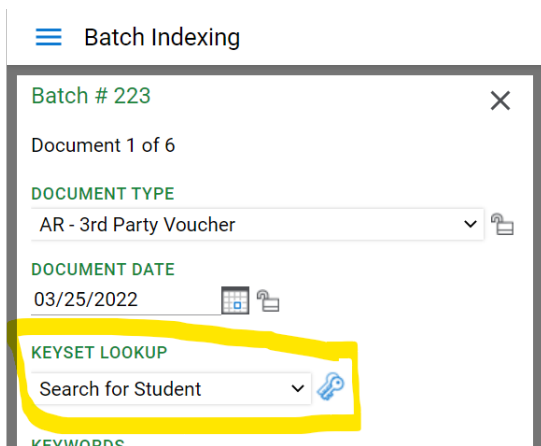
Document Batch Buttons



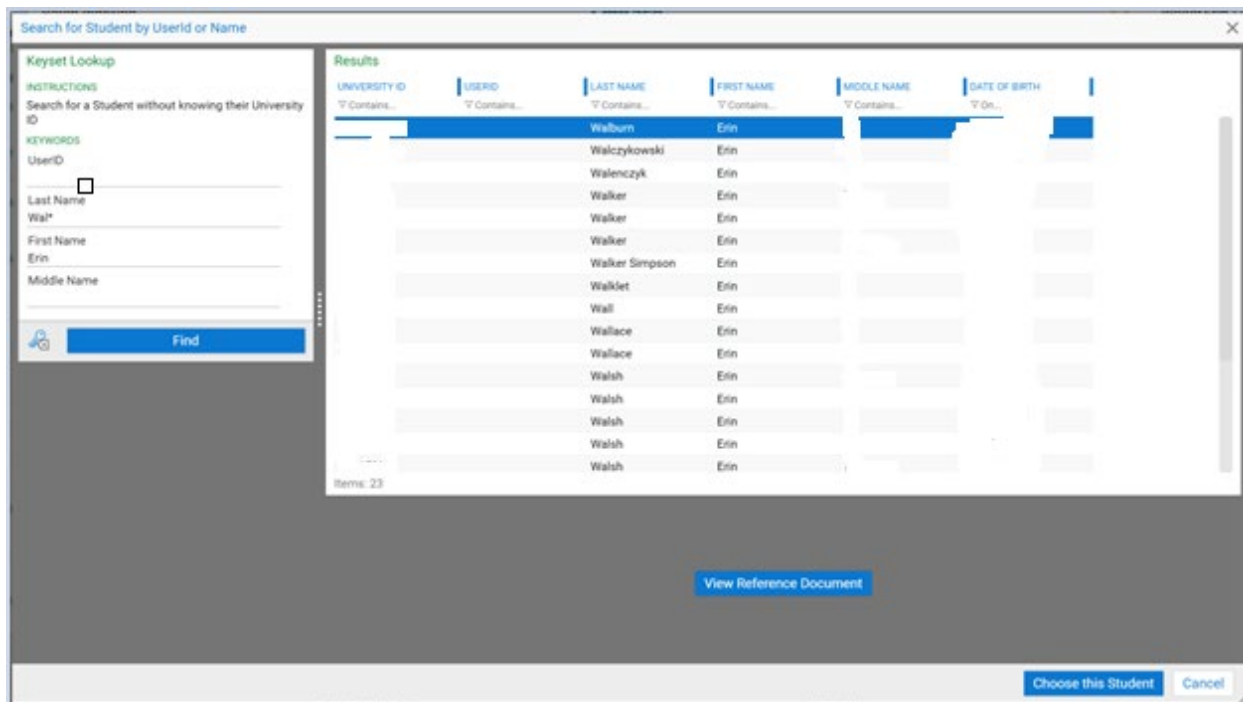
- **Index Documents** – save the index to the document and move to next in batch
- **Append Pages** –
- **Create New Document** –
- **Delete Document** – removes the document from OnBase
- **Undo** – Undo the last action
- **Clear keywords** – Removes all the data in the keyword fields and resets it
- **Stop Indexing** –
- **Arrows** – move through to specific documents in batch without indexing

Lookup Student

You can look up student with some keywords we have available in OnBase.



Clicking on key next to Search for Student will bring up the search page. You can also use wildcards.



Double click or use the Choose this Student button to select the id to go back on keyword pane for indexing the document.

Save and Transition

Once the batch is totally worked, you can Save and Transition this batch to final step which is an auto-commit.

The image shows a software dialog box with a dark header bar containing a logo on the left and a close button (X) on the right. The main title of the dialog is "Indexing Stopped or Completed". Below the title, there are three distinct action boxes, each starting with a green checkmark icon. The first box is titled "Review the Last Action" and contains the text "Return to the indexing panel to review the last action." The second box is titled "Save and Transition" and contains the text "Save changes and transition the batch to the next processing queue." This second box is highlighted with a yellow border. The third box is titled "Save and Close" and contains the text "Changes will be saved but the batch will not transition to the next processing queue."

Indexing Stopped or Completed

- ✓ **Review the Last Action**
Return to the indexing panel to review the last action.
- ✓ **Save and Transition**
Save changes and transition the batch to the next processing queue.
- ✓ **Save and Close**
Changes will be saved but the batch will not transition to the next processing queue.