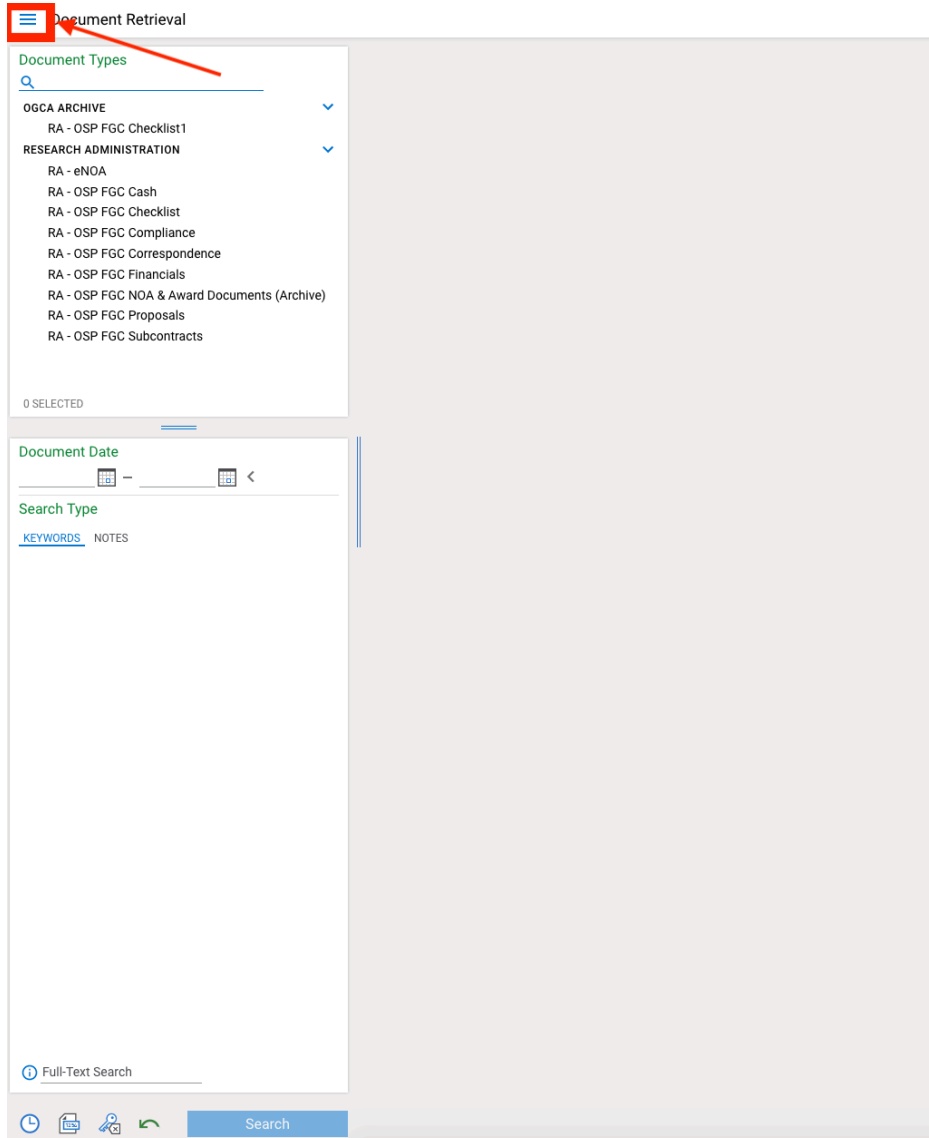


Importing Documents into OnBase

Please go to: <https://imaging.emory.edu/>

In the top left corner, please click on the menu button.



Please select the "Import Document" option:

The screenshot displays a software interface for document management. On the left, a sidebar menu is visible under the heading "Document Retrieval". The menu items are categorized as follows:

- DOCUMENT**
 - Document Retrieval
 - Custom Queries
 - Import Document** (highlighted with a red box and a red arrow pointing to it)
 - Batch Indexing
 - Documents Checked Out
- WORKFLOW**
 - Open Workflow
- STATUSVIEW**
 - Open StatusView
- USER**
 - Mailbox
 - Locked Objects
- ADMIN**
 - Open Administration

The main content area on the right is titled "Document Retrieval" and contains the following sections:

- Document Types**: A search bar is present above a list of document types. The list includes:
 - OGCA ARCHIVE (with a dropdown arrow)
 - RA - OSP FGC Checklist1
 - RESEARCH ADMINISTRATION (with a dropdown arrow)
 - RA - eNOA
 - RA - OSP FGC Cash
 - RA - OSP FGC Checklist
 - RA - OSP FGC Compliance
 - RA - OSP FGC Correspondence
 - RA - OSP FGC Financials
 - RA - OSP FGC NOA & Award Documents (Archive)
 - RA - OSP FGC Proposals
 - RA - OSP FGC Subcontracts
- Document Date**: A date range selector with a minus sign and a left arrow.
- Search Type**: Two tabs, "KEYWORDS" (selected) and "NOTES".
- Full-Text Search**: A search input field with a magnifying glass icon.
- Search**: A blue button at the bottom right of the main area.

At the bottom of the interface, there is a navigation bar with icons for a clock, a document, a magnifying glass, a refresh arrow, and a "Search" button.

This is a CRITICAL step of the process.

Please select the appropriate Document Type, as labeled with the **red box** in the screenshot below.

Then, if the proposal has been awarded, please enter an Award ID and hit the TAB key, as shown in the **green box** below. This should cause the rest of the keywords to auto-populate. Select the subcategory type, as shown in the **purple box** below, and click on “Import” to complete the upload.

If the proposal has not been awarded, please enter the Proposal ID, followed by the TAB key, as shown in **blue box** below. This should auto-populate the rest of the data. Select the subcategory type, as shown in the **purple box** below, and click on “Import” to complete the upload.

The screenshot shows a web form titled "Import Settings". At the top, there is a "Select File" section with a "Browse..." button and the text "No file selected.". Below this is the "Import Settings" section, which includes a "Document Type Groups" dropdown menu set to "<All>". The "Document Types" dropdown menu is highlighted with a red box and contains the option "RA - OSP FGC Cash". Below this is a "File Type" dropdown menu set to "PDF (.pdf)". There is a checked checkbox for "Initiate Workflow". The "Document Date" is set to "10/26/2018". Under the "KEYWORDS" section, there are several input fields: "RA Award Date" (empty), "RA Proposal ID" (highlighted with a blue box), "RA Cash Type" (highlighted with a purple box), and "RA AwardID" (highlighted with a green box). Below these are several other input fields: "EU EmplID", "RA P.I. Full Name", "RA P.I. Last Name", "RA P.I. First Name", "EU Dept", "RA Project Number", "RA Project Title", "RA Award Ref Number", "RA Agency Name", "RA OSP FGC SysDate", "RA SYS Source", and "SYS File Format". At the bottom of the form, there are navigation icons and a blue "Import" button.

Note: if the data does not auto-populate after entering either an Award ID or Proposal ID and hitting the TAB key, please contact milos.bogetic@emory.edu for assistance. This should occur on rare occasions only.

Note: Please make sure to use the AWARD ID if the proposal has been awarded. If it has not been awarded, only then should you use the PROPOSAL ID.