

## Using the Hyland Virtual Print Driver

You will find the Virtual Print Driver (VPD) very useful when you want to upload documents of any format into OnBase. Once in OnBase, they will be converted to an image file (.tif) for quick, easy access.

These can be:

- documents created by you in MSWord, Excel or other programs
- documents sent to you by someone else
- documents stored on a drive or disk

To upload a document to OnBase with the VPD, you must have an OnBase client running. This can be the Unity Client if you have it installed, or the Web Client that you access over the internet.

The steps are:

Open the document you want to print.

Take the steps to print the document. The example on the left is the print area of MSWord.

From the printer dropdown, choose **Hyland Software Virtual Printer**.

Click the "print" icon.

Choose the Document Type Group and the Document Type from the drop downs.

"Printing" will launch an OnBase window.

From the ribbon at the top, you have the ability to rotate the document or delete pages if necessary. To delete or look at different pages, click the thumbnails from the panel on the right.

On this screen, you will also select the Document Type Group and Document Type for the document you are uploading.

The screenshot shows the 'Upload' dialog box in OnBase. It contains the following fields and options:

- Document Type Group: TEST Student Records
- Document Type: TEST Student Absence Detail
- File Type: Image File Format
- Document Date: 1/30/2013
- Keywords: TEST Student ID# 1003, TEST Student Name (Last,First) STUDENT1003, ERIN, TEST Last Name STUDENT1003, TEST First Name ERIN, TEST School Year 2009-2010, TEST Home School
- Options:  Open Document After Upload,  Delete Files After Upload
- Buttons: Upload, Cancel

Red callout boxes provide the following instructions:

- Leave the File Type as Image File Format.
- Enter the keywords.
- Click the double arrows to find and select these options.
- Click the Upload button.

Check that the File Type is Image File Format.

Enter the keywords.

Check to see that the options you want are checked.

- **Open Document After Upload** will open the document in OnBase. This is useful if you plan to append to another image document – you cannot append to PDFs or other formats.
- **Delete Files After Upload** will delete the document from your computer. Use this if you have no need to keep the document outside of OnBase.

Click the Upload button.

Congratulations! You are finished!