Printing with the OnBase Virtual Printer

This installation guide covers these topics:

- Installing the OnBase Virtual Printer

- What version of Windows 7 (32- or 64-bit) are you running?

- Printing to the OnBase Virtual Printer

Before you can print with the OnBase Virtual Printer, you must first install the virtual printer.

Installing the OnBase Virtual Printer

In order to print documents directly to OnBase, you must have the OnBase Virtual Printer installed.

1. Determine what version of Windows 7 you have installed on your PC, 32-bit or 64-bit.

Note: For instructions on finding out your version, *see What version of Windows 7 (32- or 64-bit) are you running?*
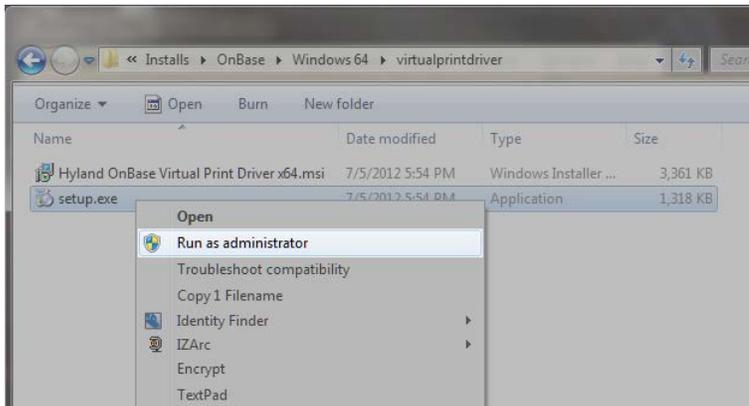
2. Open Windows Explorer.
3. Navigate to your SHARE drive. This is usually **P:**.
4. Locate the appropriate folder.
5. For 32-bit Windows go to
   P:\Installs\OnBase\Windows 32\virtualprintdriver

   For 64-bit Windows go to
   P:\Installs\OnBase\Windows 64\virtualprintdriver
   Where *P:* is the drive on your PC assigned to the UTD SHARE drive.
6. Highlight (single-click) the file named **setup.exe**.

7. Right-click the mouse and select **Run as administrator.**

The setup wizard begins.
8. Select **Next**.
   The **End User License Agreement** dialog box displays.
9. Click the **checkbox** next to the statement, "I accept the terms in the License Agreement."
10. Select **Next.**
    The **Installation Options** dialog box displays.
11. Accept the defaults on the Installation Options dialog box.
12. Select **Next**.
    The **Install** dialog box displays.
13. Click **Install**.
    The **Installation Status** dialog box displays the progress of the install process.
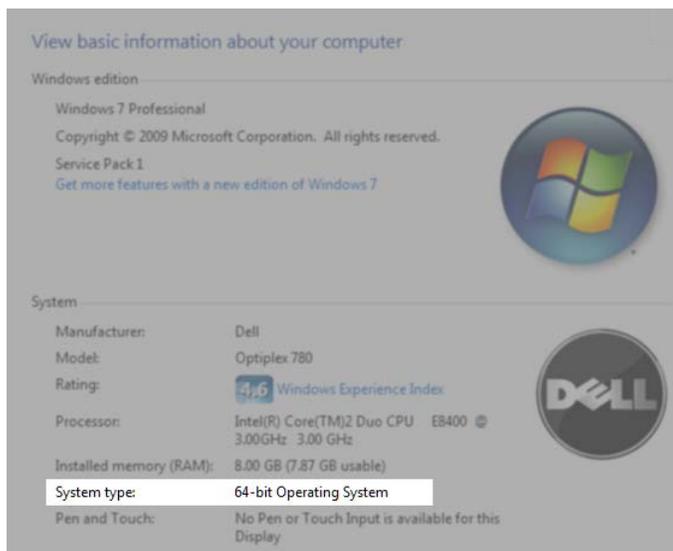14. When the installation process is complete a dialog box displays.
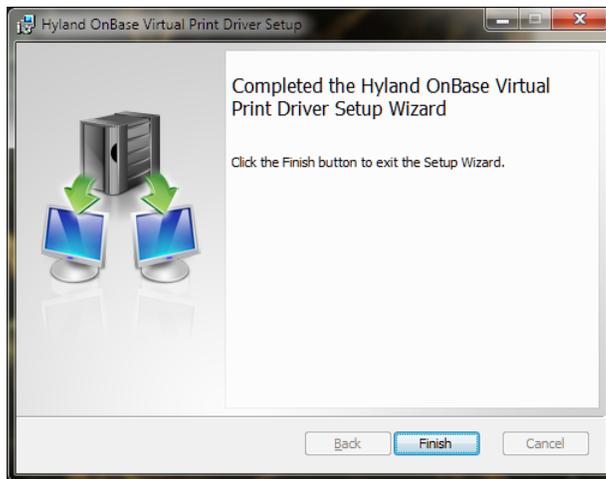
15. Click **Finish**.

What version of Windows 7 (32- or 64-bit) are you running?

Note: To determine what version of Windows 7 (32- or 64-bit) you are running:

1. Click the **Start** button .
2. Right-click **Computer** in the right-hand menu.
3. Click **Properties**.

Basic information about your system is displayed.

4. Your operating system is listed next to **System type**.

March 11, 2013

Printing to the OnBase Virtual Printer

By printing to the OnBase Virtual Printer, you can insert any electronic document into OnBase. In other words, you can "scan" any document on your computer into OnBase.

For purposes of demonstrating the virtual printer, we are documenting the process of moving a PDF document into OnBase.

In this example, let's assume we've received a Bursar Demand Letter as a PDF attachment to an email.

Note: This same process can be used to insert any type of electronic document into OnBase. Text files, spreadsheets, word documents, even pictures can be printed to OnBase.

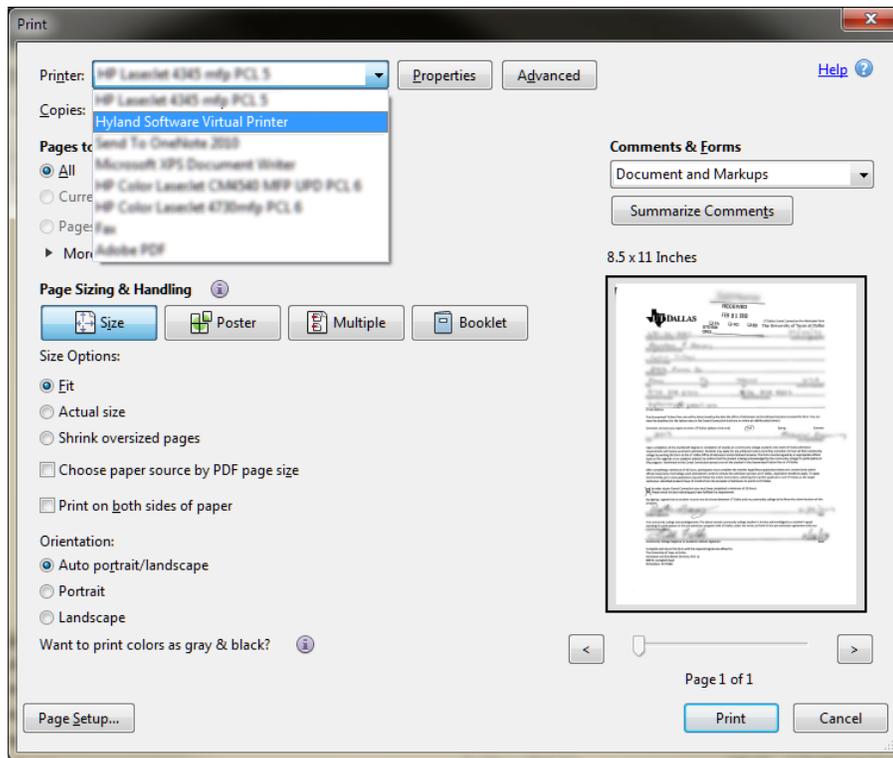1. Make sure your OnBase client is open.

Note: the OnBase client must be open, and you must be logged in to the client in order for virtual printing to occur.
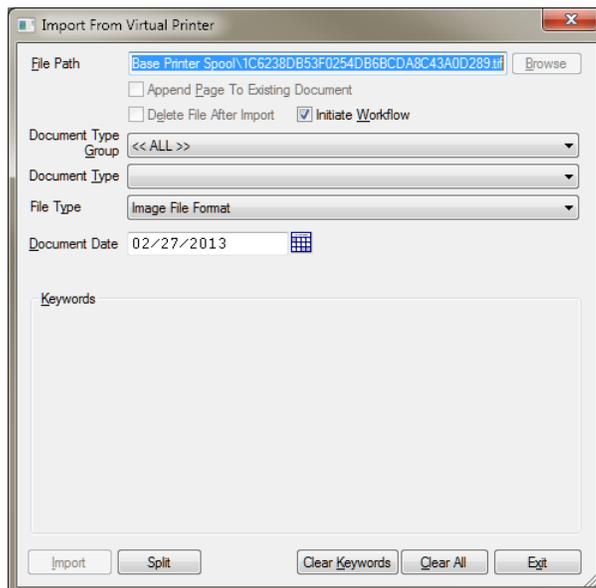
2. Open the PDF in **Adobe Reader**.
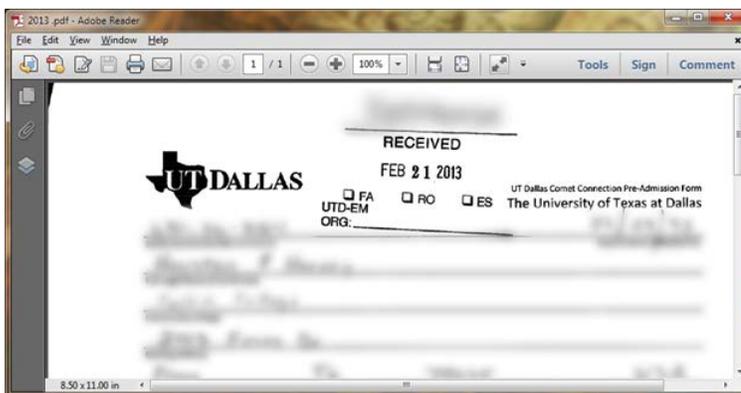
The document displays. We have blurred out personal data in the above example.

3. Click the **Print** icon in the toolbar .

The Printer dialog box opens.

4. Select **Hyland Software Virtual Printer** from the Printer: drop-down list.
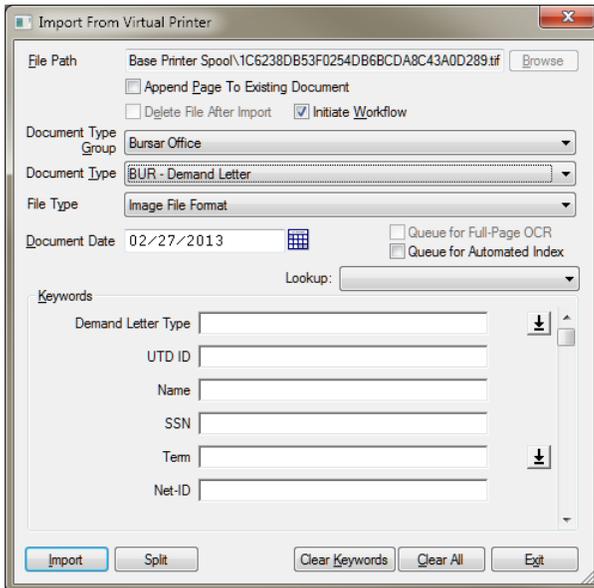
The Import From Virtual Printer dialog box opens.

Note: You may have to switch windows or minimize some programs to see the Import From Virtual Printer dialog box.
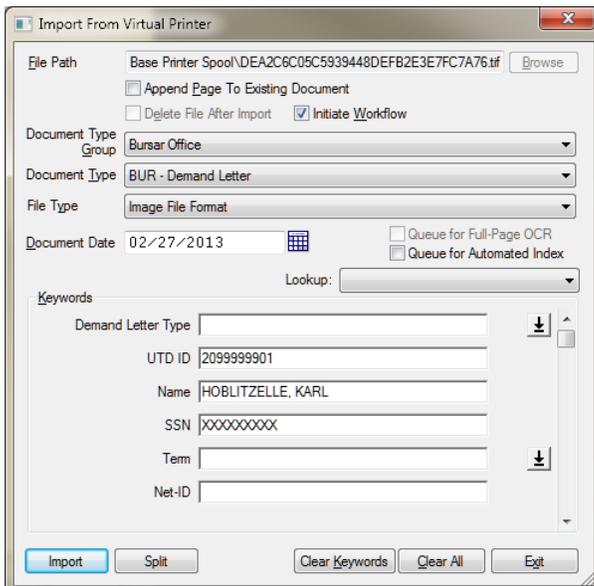
Now you may proceed with the steps you normally take when scanning a document into OnBase.

1. Select the **Document Type Group**.
2. Select the **Document Type**.

A list of available keywords appear in the **Keywords** pane.

3. Enter the student's <u>UTD ID</u>.
4. Press **[TAB]**

Several fields auto-populate with the student's data.

5. Add any additional keywords.

6. Select **Import**.

    The image file is imported into OnBase and you are finished.