

Transferring Board & Commission Documents from the Website to OnBase

Why is this important

OnBase is now the City's official, centralized system for board and commission records. This change ensures:

- The public has **one consistent place** to find records
- Records are **properly preserved** in compliance with retention requirements
- Documents remain accessible even when website pages change or staff turn over

This process is not optional. It is the City's standard for how board and commission records must be managed going forward.

What this guide covers

This guide walks you through how to:

- Move historical documents from the website into OnBase
- Remove documents from the website after upload
- Post the required OnBase access language and link
- Maintain ongoing compliance after the transfer is complete

Ongoing Document Workflow (after transfer is complete)

Once your historical documents have been transferred to OnBase:

- **Upcoming meetings:**
Agendas, notices, and packets must still be posted on your board's webpage as usual.
- **After the meeting occurs:**
Those documents must then be **uploaded into OnBase and removed from the website**, so OnBase remains the permanent public archive.

In short:

Website = short-term access for upcoming meetings

OnBase = permanent public record

This keeps the website clean and ensures the public always knows where to find official records.

Systems you will use

You will need three windows open:

1. Your board or commission's website (where documents are currently listed)

2. Your department or division document folder (e.g., <https://www.cabq.gov/clerk/documents/>)
3. OnBase: <https://ecm.cabq.gov/AppNet/>

Step 1: Locate the document on the website

1. Open the document on your board's webpage.
2. In the browser's URL bar, add **/view** to the end of the link and press Enter.
3. A new page will open showing the document's name.
4. Copy the document name.

Step 2: Find and download the document from the department folder

1. Open your department's documents folder.
2. Use the search bar to search for the document name.
3. Download the file.
4. Confirm it matches the document listed on the webpage.

Step 3: Upload the document to OnBase



1. Open OnBase: <https://ecm.cabq.gov/AppNet/>
2. Click the **hamburger menu** (three lines) in the top-left corner.
3. Select **Import Documents**.
4. Click **Browse** and select the file you downloaded.

Complete the indexing fields

- **Document Type Groups:** City Clerk
- **Document Types:** CC – Boards and Commissions
- **File Type:** Must be PDF
- **Date of the Document:** Date of the meeting
- **Board or Commission Name:** Select the correct board/commission
- **Record Type:** Agenda, Minutes, Notice, or Other

- **Other Record Type Name:** If “Other,” enter a clear label (e.g., Resolution 2023, Annual Report)
- **Notes and Keywords:** Leave blank
- **Meeting Date:** Enter the meeting date

Click the blue **Import** button.

You should see a green banner confirming **Import Successfully**.

All documents must be uploaded as PDFs.

The screenshot shows the OnBase 'Import Document' interface on the left and a preview of a document on the right. Yellow arrows indicate the mapping between the 'Import Settings' and the document content:

- Import Settings:**
 - Document Type Groups: City Clerk
 - Document Types: CC - Boards and Commissions
 - File Type: PDF (.pdf)
 - Document Date: 02/03/2023
 - Keywords: BOARD OF ETHICS
 - record type: AGENDAS
 - Meeting Date: 02/03/2023
- Document Preview (City of Albuquerque):**
 - Document Queue (1): Agenda February 3 2023.pdf Imported Successfully
 - City of Albuquerque logo and name
 - Office of the City Clerk
 - Timothy M. Keller, Mayor
 - BOARD OF ETHICS & CAMPAIGN PRACTICES
 - ZOOM: <https://cabq.zoom.us/j/89611147122?pwd=Qld0NGpUek8yNGYlVVlw>
 - Kristina Caffrey, Acting Chair James Breen
 - Sean Cunniff
 - Jason Marks
 - Joshua Martinez
 - Susan Selbin
 - AGENDA**
 - FRIDAY, FEBRUARY 3, 2023 2:00 P.M.

Step 4: Delete the document from the website (Plone)

After the document is successfully uploaded to OnBase:

1. Return to the document in Plone.
2. In contents view, check the box next to the document.
3. Click the red trash can icon.

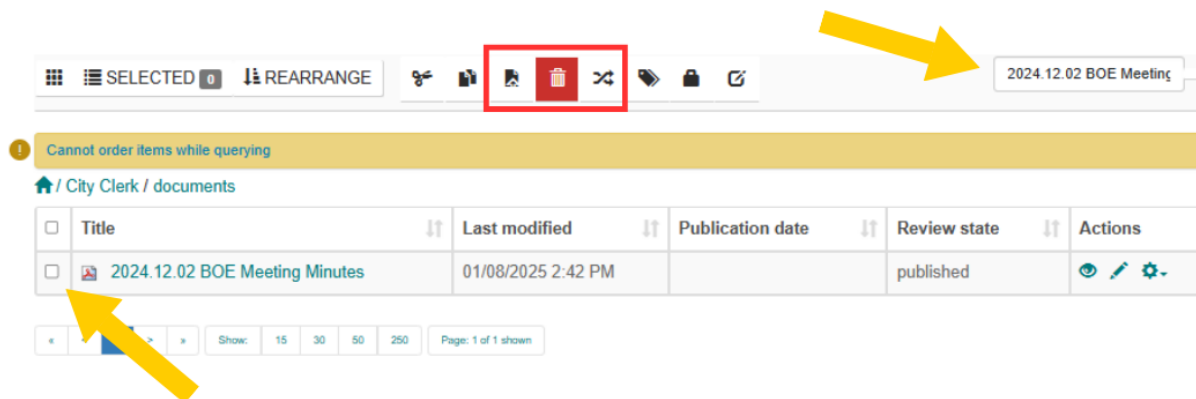
If Plone warns about broken links

- Click edit in a new window
- Remove the document link from each page where it appears

If you do not have access to edit a page:

- Email webteam@cabq.gov
- Include:
 - The page URL
 - The exact link text that needs to be removed

Once all links are removed, confirm deletion when prompted.



Step 5: Repeat until complete

Repeat Steps 1-4 until all historical documents are uploaded to OnBase and removed from the website.

Step 6: Add the required OnBase link to your website.

Every board, commission, and committee webpage must include:

- A button or link to the OnBase public access page:
<https://onbase.cabq.gov/publicaccess/?CQID=136>
- The link text must read: **“Historical Meeting Documents”**

This single link replaces all individual document links on your webpage.

Example of a completed webpage

Before making changes to your own page, review the Board of Ethics and Campaign Practices page as a model for how this should look:

<https://www.cabq.gov/clerk/ethics-1/board-of-ethics#upcoming-board-of-ethics-meetings>

If you need help creating the button, contact webteam@cabq.gov.

Required public-facing language for your webpage

Place this text above your OnBase button or link:

Accessing Board and Commission Documents via OnBase

All board and commission documents, including agendas, minutes, resolutions, and other related materials, are available through the OnBase database.

Follow the steps below to access the documents:

1. **Click the Link Below:**
Use the link provided below to access the OnBase database.
2. **Search for Documents:**
 - Use the drop-down menu to specify the Board or Commission, record type, or meeting date.
3. **View or Download:**
 - Click on the document title to view it directly in your browser.
 - Use the download option to save a copy for your records.

[HISTORICAL MEETING DOCUMENTS]

Editing a Document in OnBase

1. Open OnBase and select **Document Retrieval** from the menu.
2. Search using available filters (board/commission, document type, meeting date).
3. Double-click the document to open it.
4. Select **Edit**.
5. After changes, click **Re-Index**.
6. Confirm the metadata is accurate.
7. Save and close.

The screenshot displays the OnBase Document Retrieval interface. On the left, the 'Document Retrieval' sidebar is visible, featuring a search bar and various filters. The 'Document Types' section is expanded, showing a list of categories including 'City Clerk', 'City Contracts', and 'Boards & Commissions'. The 'Boards & Commissions' category is selected, and its sub-items are listed. The 'Document Date' section shows a date range filter. The 'Search Type' section includes fields for 'Keywords', 'Text', and 'Notes'. The 'Board or Commission name' is set to 'BOARD OF ETHICS', and the 'record type' is set to 'AGENDAS'. The 'Meeting Date' field is also present. The 'BatchKey' field is set to 'Full-Text Search'. The 'Search' button is at the bottom of the sidebar. On the right, the 'Document Search Results' section shows a list of documents. The first document, 'Boards & Commissions - BOARD OF ETHICS AGENDAS 12/2/2024', is highlighted. Below the list, there are buttons for 'Document', 'Edit', 'Process', 'Previous Document', and 'Next Document'. The 'Edit' button is highlighted with a red box. Below the 'Edit' button, there is a 'Re-Index' button. The main content area shows a preview of the document, which is a City of Albuquerque Board of Ethics & Campaign Practices agenda. The agenda includes the City of Albuquerque logo, the title 'City of Albuquerque Office of the City Clerk', the names of the Mayor and City Clerk, and the agenda items.

Bottom line

- Upload historical records to OnBase
- Remove those records from the website
- Keep posting upcoming meeting materials to the website
- After the meeting, move them into OnBase and remove from the webpage

This keeps the public experience consistent and ensures long-term compliance with City records standards.