



PFOB App

## Print From OnBase App

### USER GUIDE

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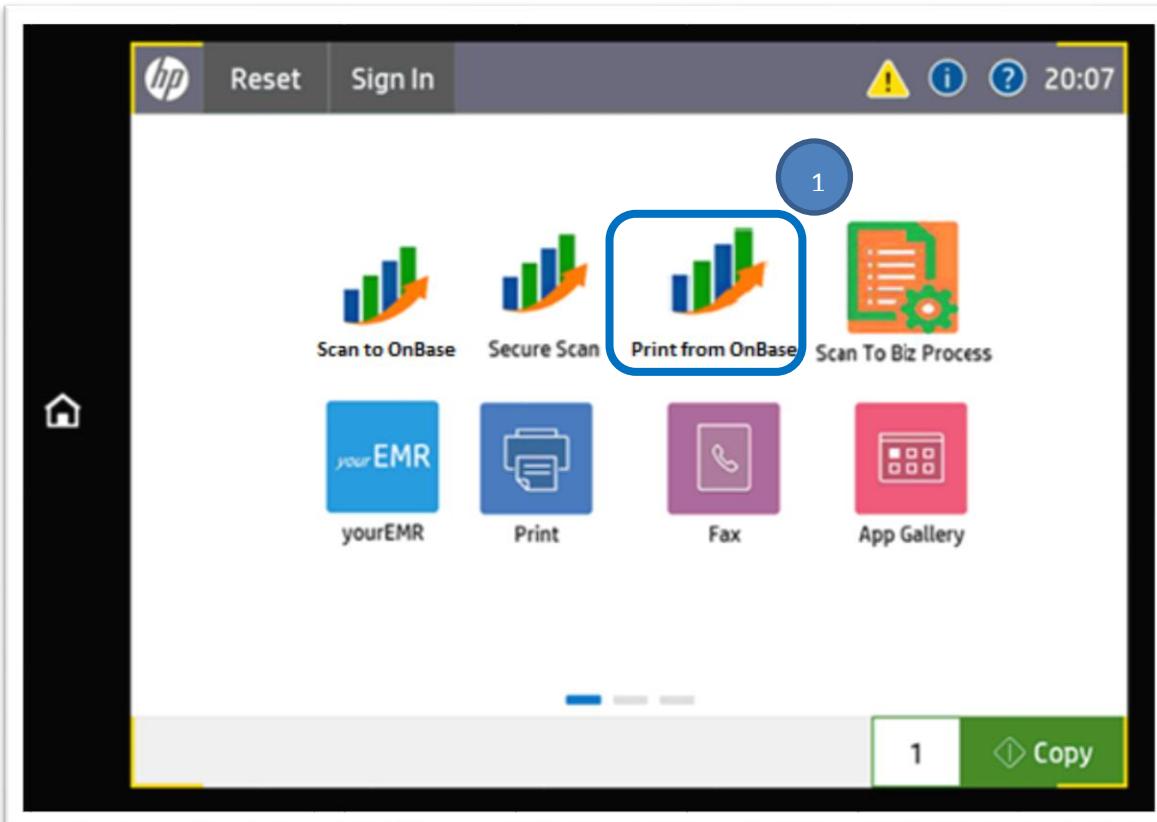


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## 1. HP - MFD Home Screen



1. Select the “Print from OnBase” App icon on the HP - MFD.

Upon clicking “Print from OnBase” App icon ‘OnBase Login’ Screen will be displayed.



## 2. OnBase Login Authentication from HP-MFD

User authentication as defined in customer's OnBase Installation will be available on HP-MFD.

Presently there are two options for authentication in OnBase:

- Microsoft Active Directory Authentication (AD)
- Standard Authentication (OnBase)

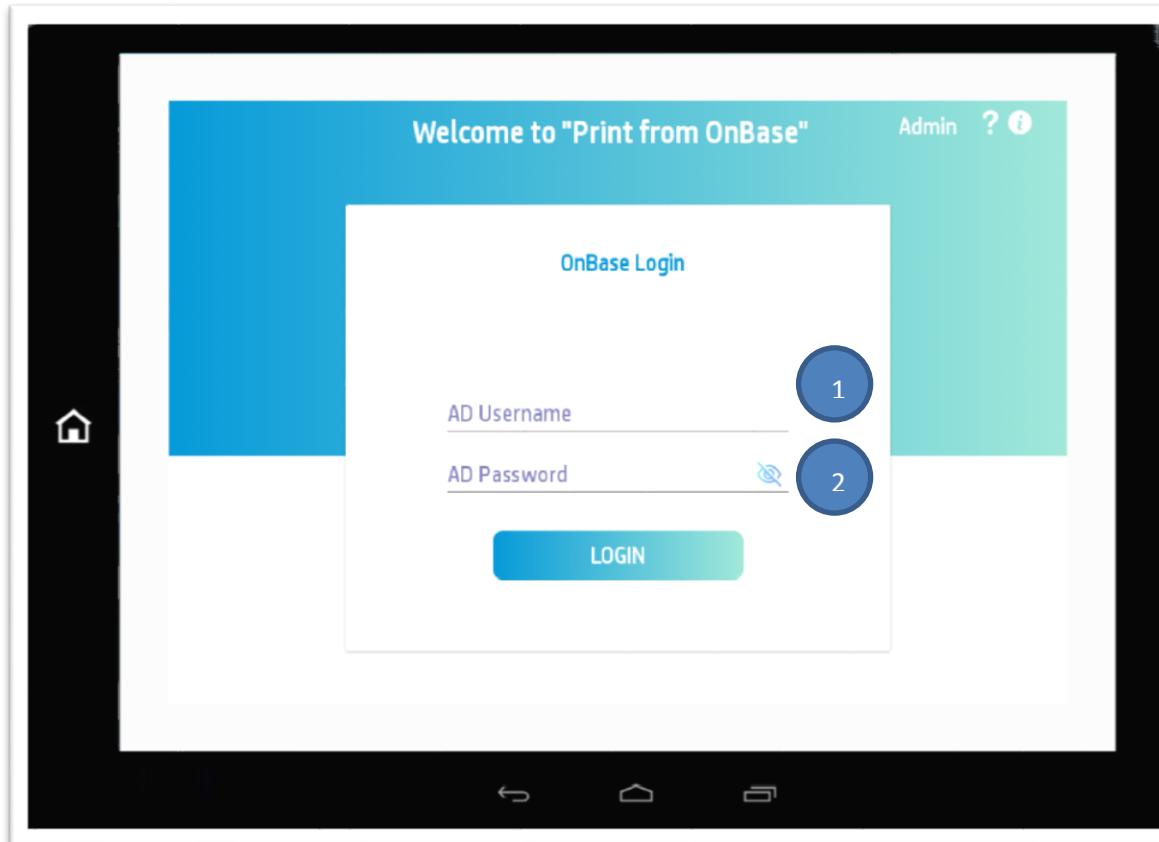
The administrator will define the authentication method to be used while installing and configuring the App on HP-MFD.

User will be logged into OnBase upon successful authentication, as configured in OnBase.



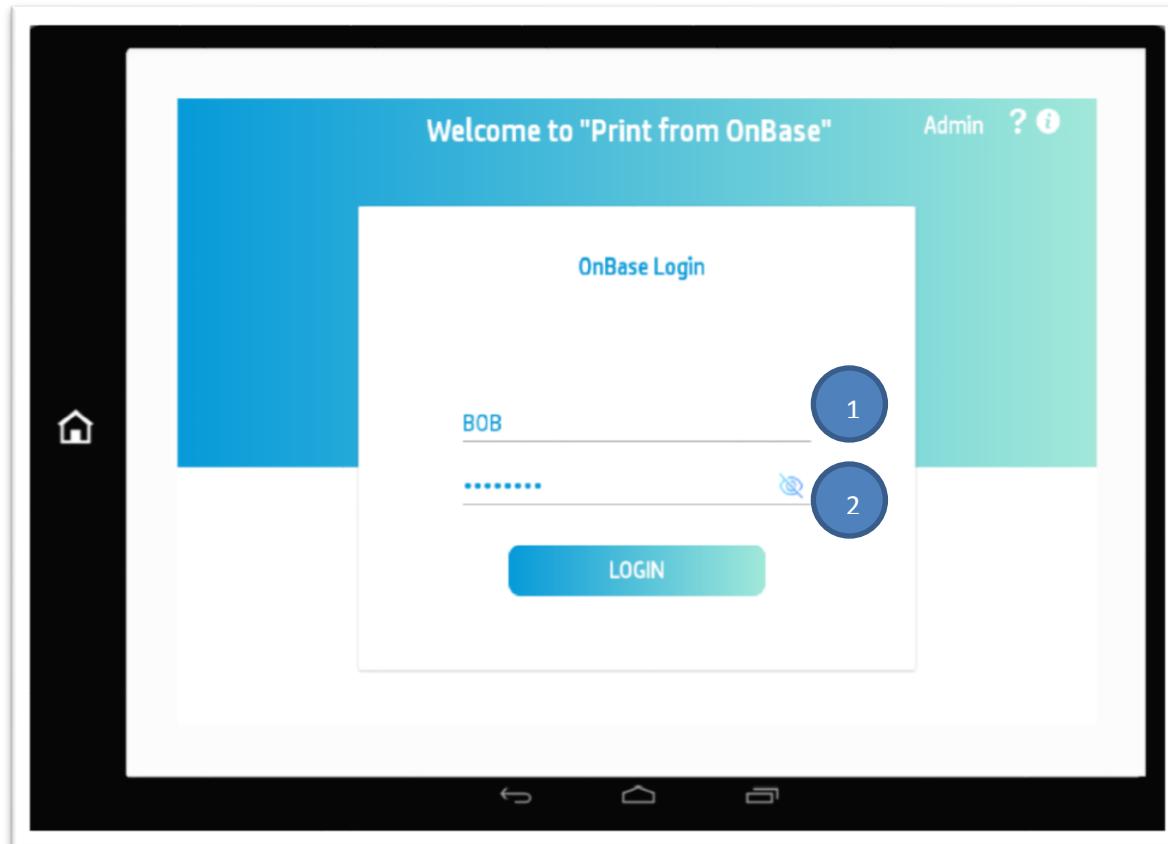
## 2.1. OnBase Login using Microsoft Active Directory (AD) Authentication:

To Login into OnBase using AD Authentication, User needs to enter their “AD Username” and “AD Password”.

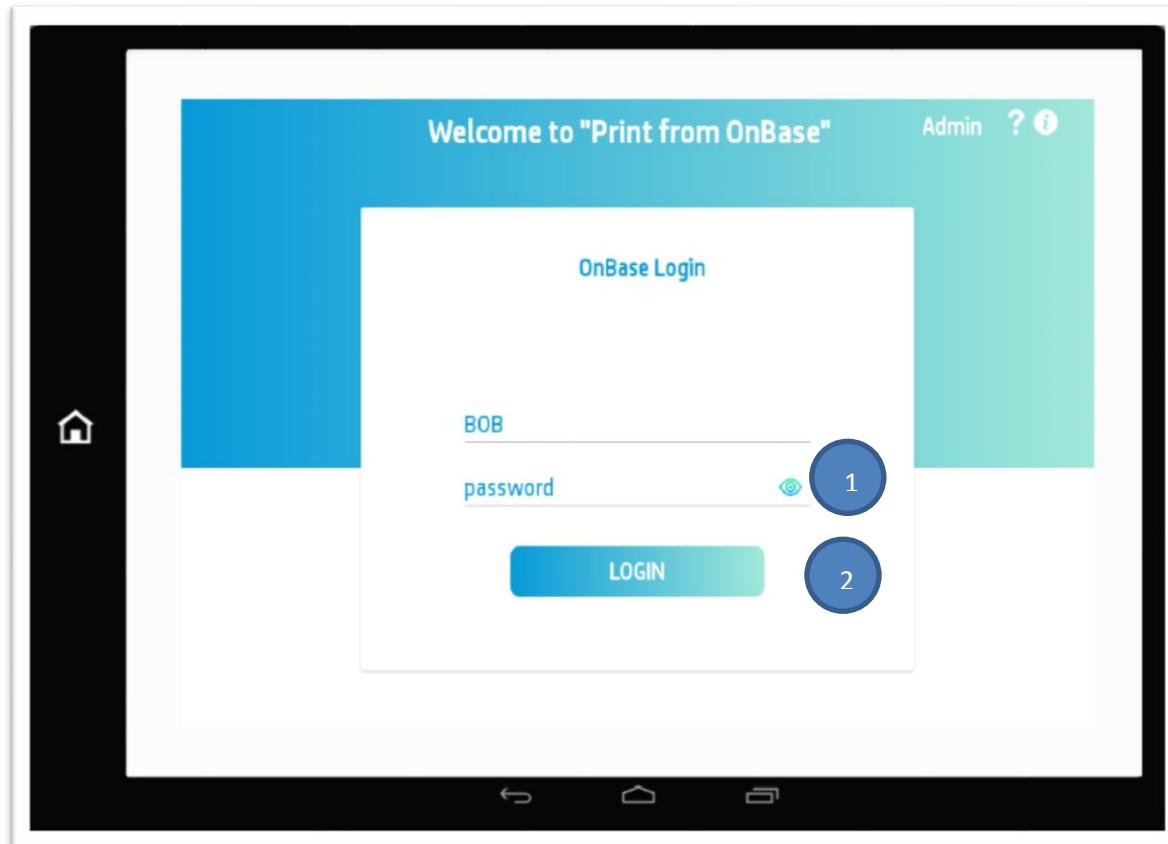


1. User needs to enter their “AD Username” here.

2. User needs to enter their “AD Password” here.



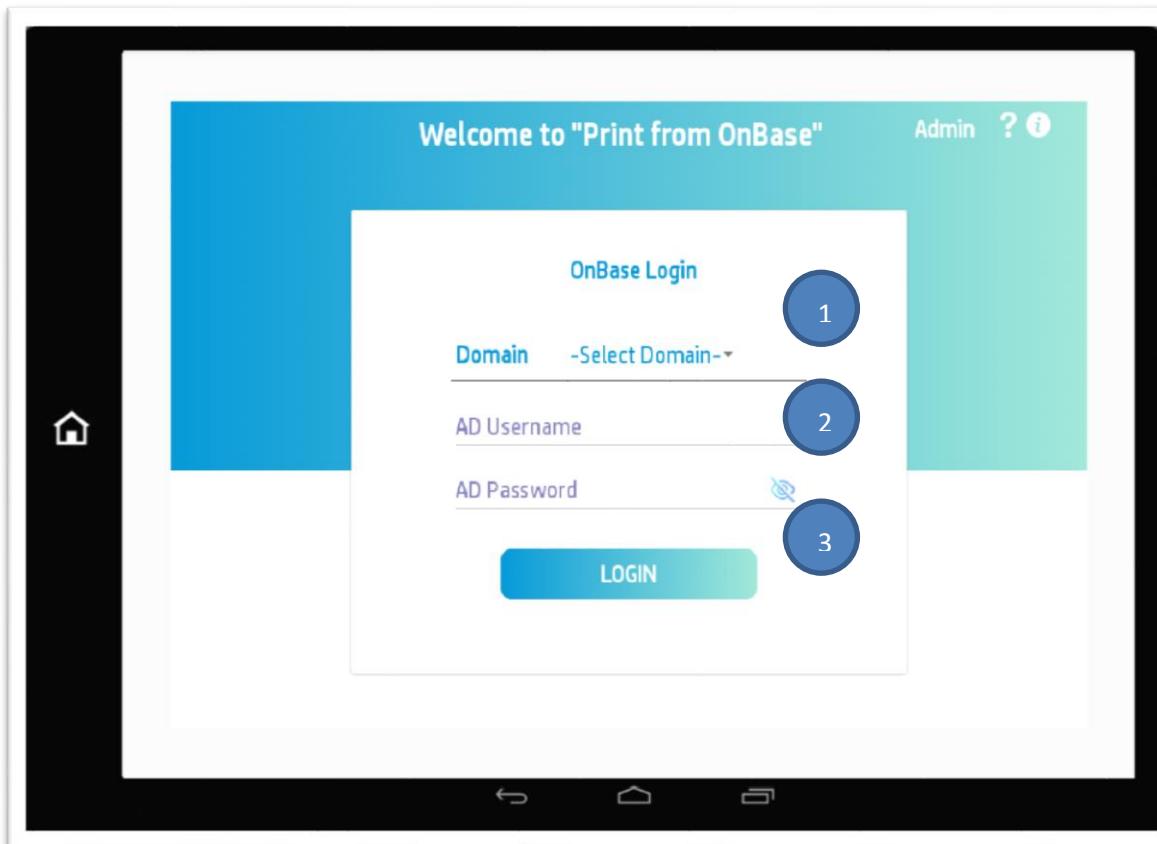
1. User to enter their **"AD Username"** here.
2. User to enter their **"AD Password"** here.



1. Click on the “” Icon to see the Password entered, if required
2. Click on “**LOGIN**” button to login into OnBase with your AD Credentials



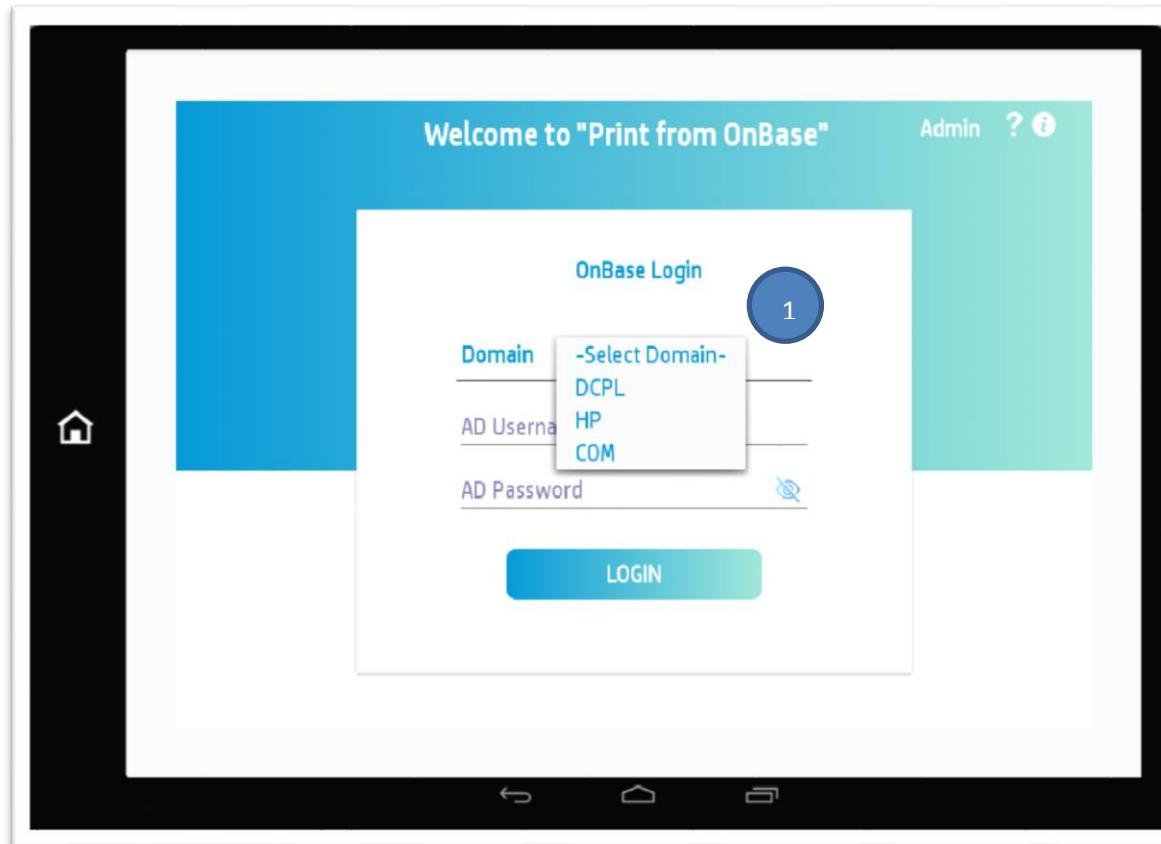
**Note:-**"Select Domain" dropdown will be available on the OnBase Login Screen only, when there are multiple domains setup by the Admin. User needs to select the "Domain" from dropdown list and enter their "AD Username" and "AD Password" to Login into OnBase using AD Authentication.



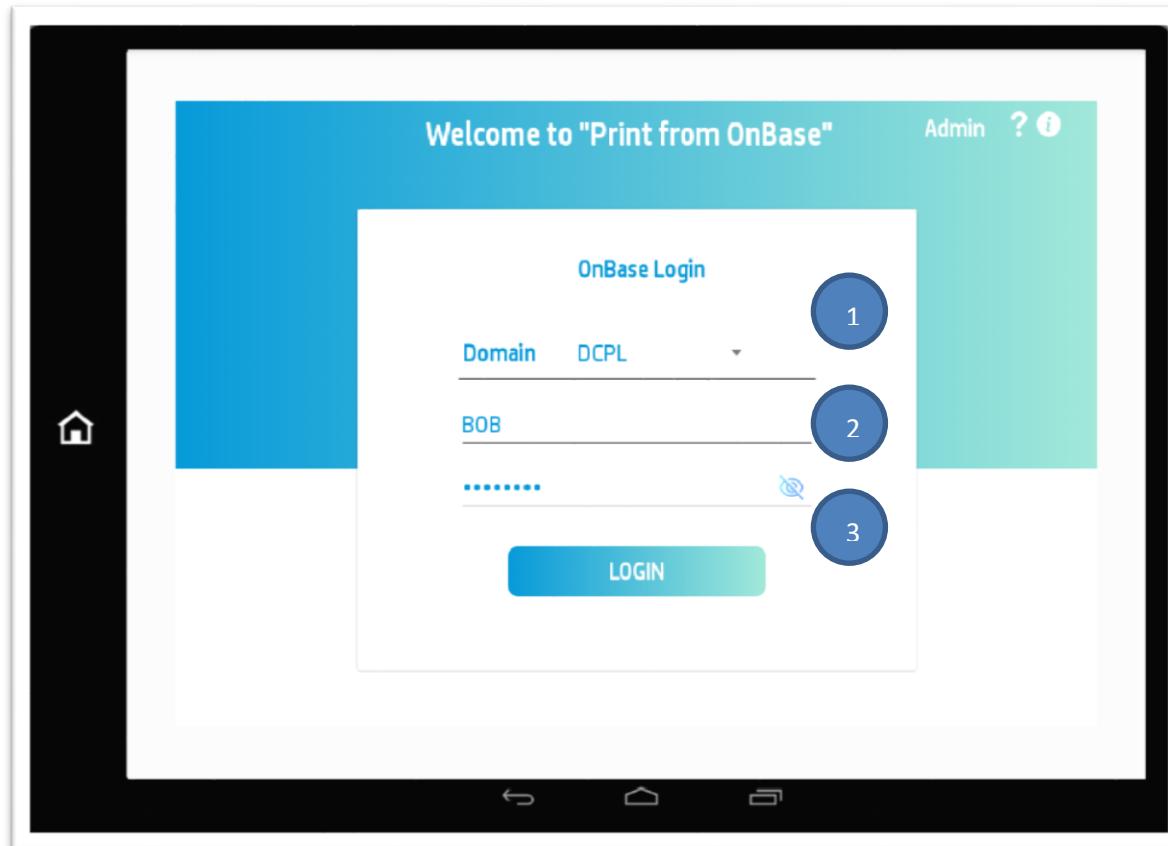
1. User to select "Domain" from dropdown list
2. User to enter their "AD Username"
3. User to enter their "AD Password"



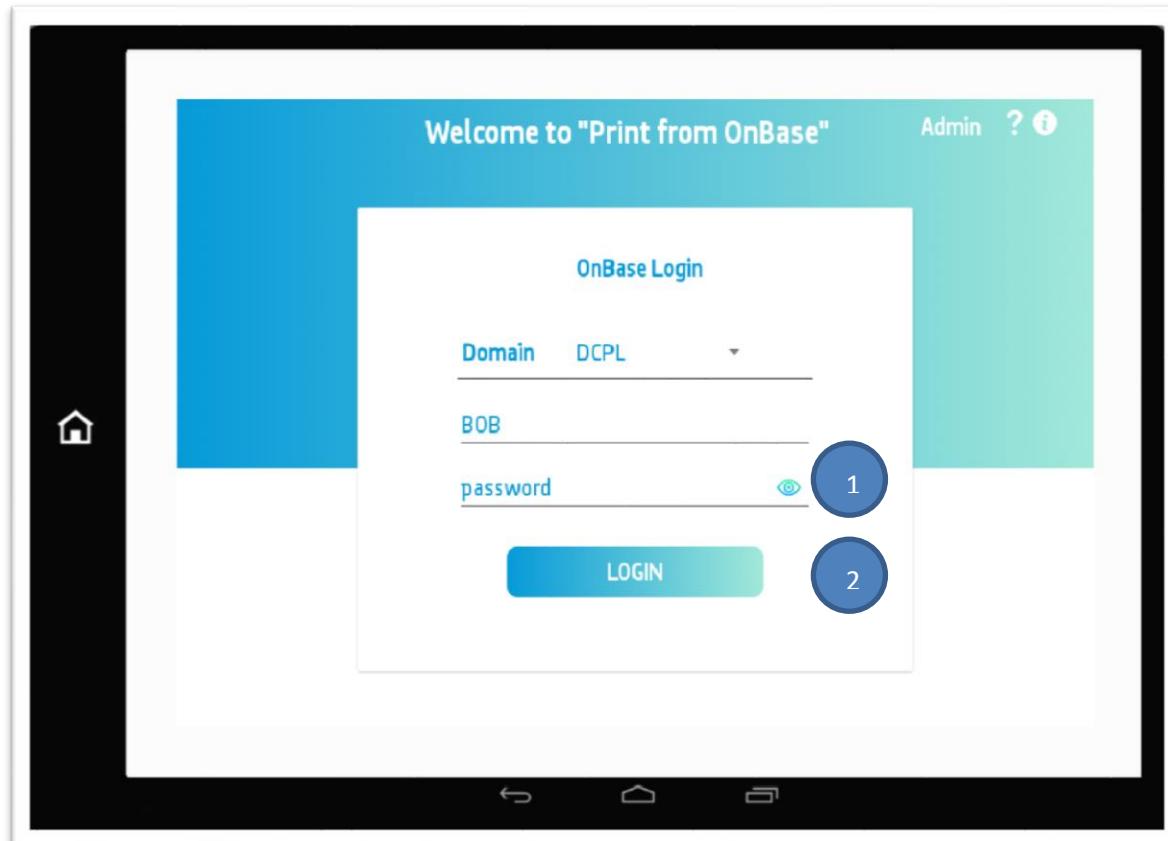
All domains which are authorized by Admin during setup will be displayed in “Select Domain” dropdown list.



1. Domains “Dropdown list” for selection.



1. User needs to select “**Domain**” here.
2. User needs to enter “**AD Username**” here
3. User needs to enter “**AD Password**” here

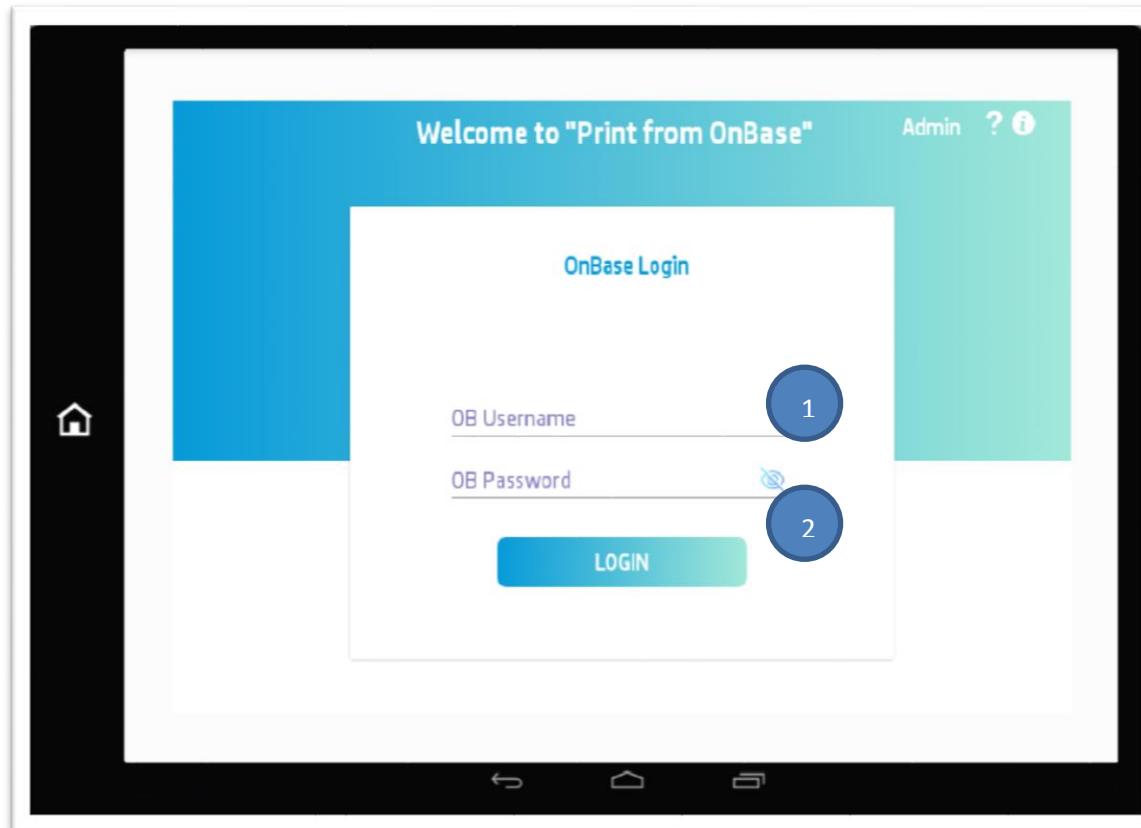


1. Click on the “” Icon to see the Password entered, if required
2. Click on “**LOGIN**” button to login into OnBase with your AD Credentials.

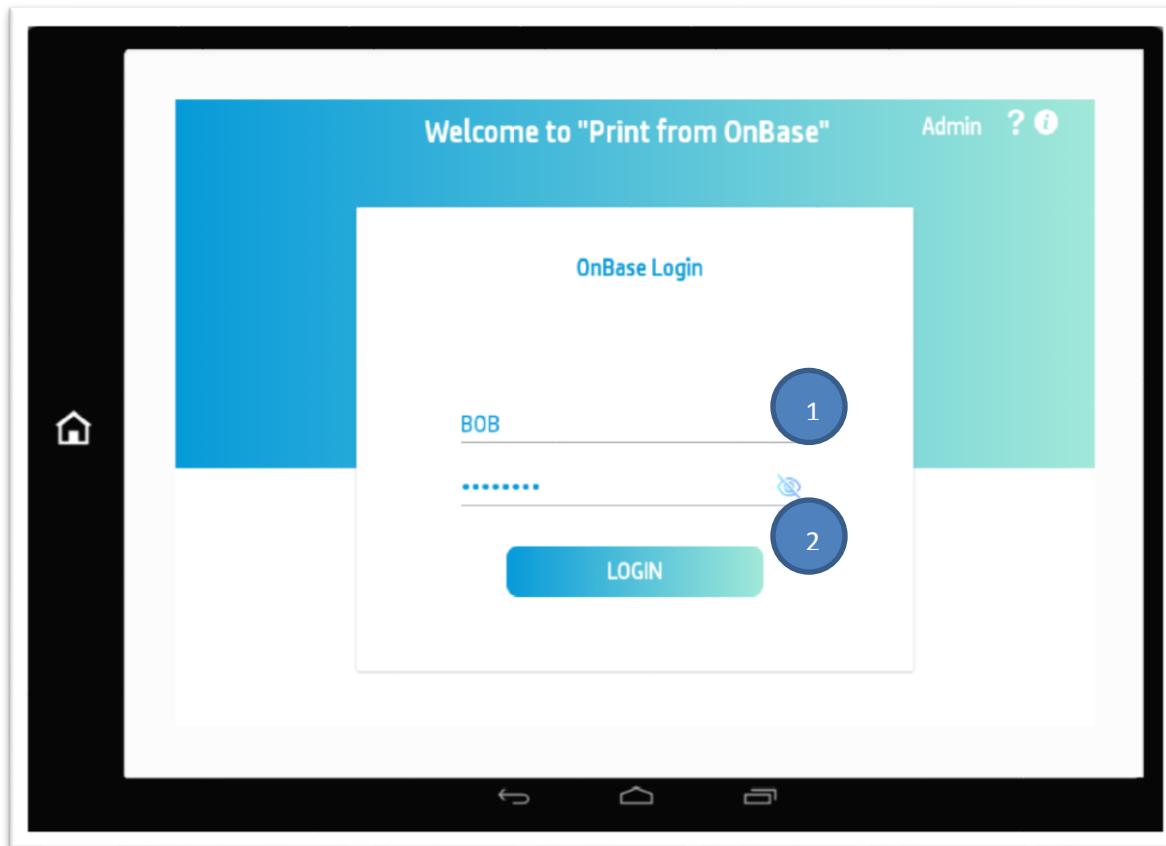


## 2.2. OnBase Login using Standard Authentication (OnBase)

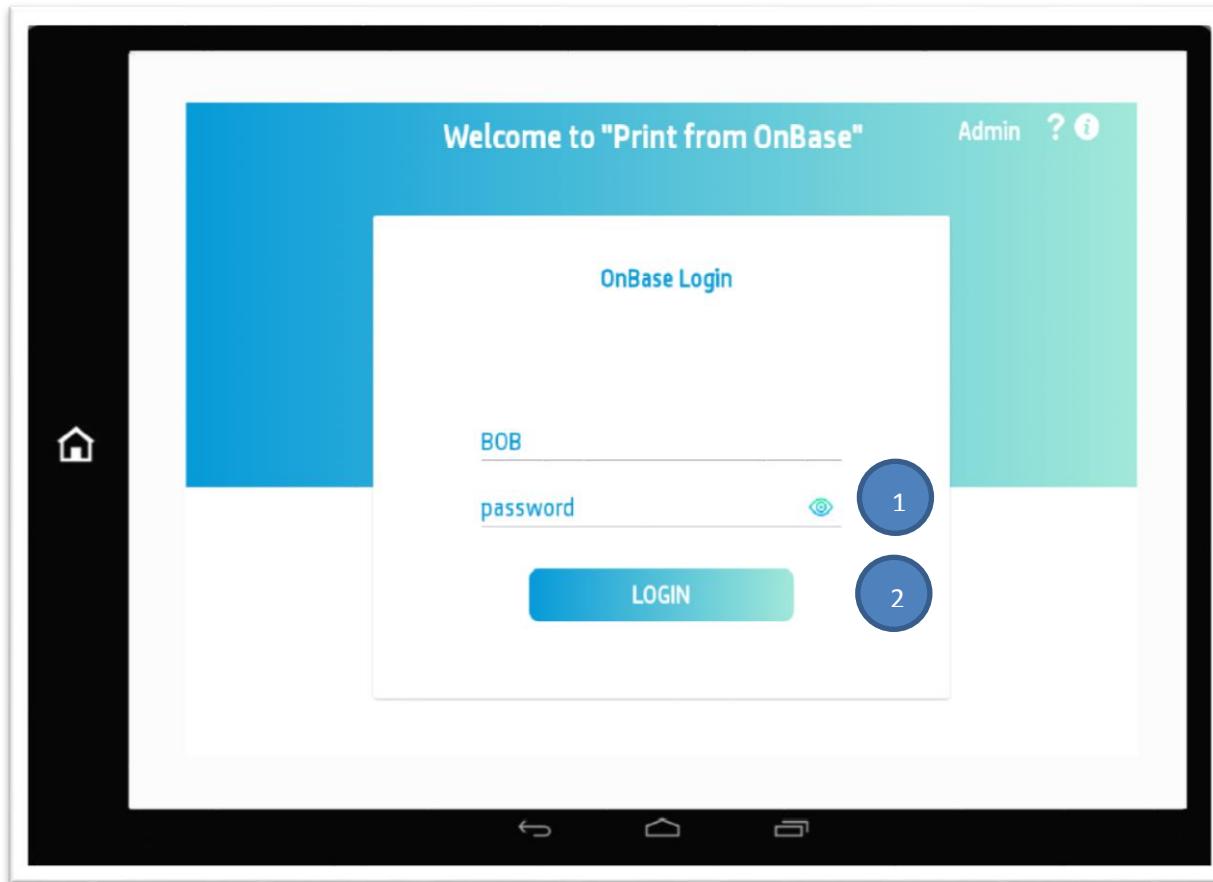
To Login into OnBase using OnBase Authentication, User needs to enter their “OnBase Username” and “OnBase Password”.



1. User needs to enter their “OnBase Username” here.
2. User needs to enter their “OnBase Password” here.



1. User needs to enter their “OnBase Username” here.
2. User needs to enter their “OnBase Password” here.



1. Click on the “

User Guide Version 1.0 (T&C Apply)



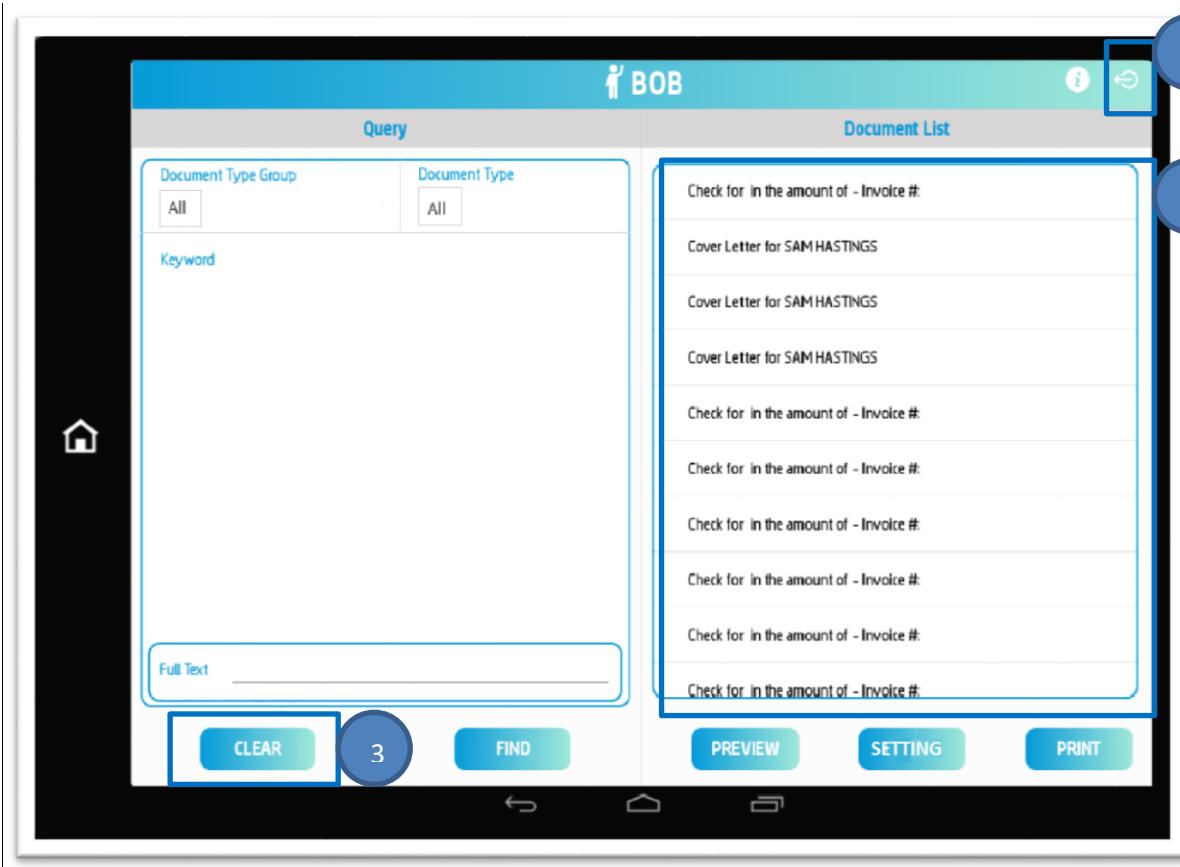
### 3. Accessing your Documents in OnBase

Upon successful login “Document Query Pane” is enabled for searching the documents in OnBase. By default, “All” “Document Type Group” and “All” “Document Type” is pre-selected in the dropdown. This list is based on the user rights and privileges in OnBase.



1. By default, “All” is selected in “Document Type Group” dropdown list.
2. By default, “All” is selected in “Document Type” dropdown list.
3. Click “FIND” button to get the required documents in “Document list pane”.

Upon clicking “FIND” button all documents corresponding to selected “DTG” and “DT” are displayed in “Document List” pane.



The screenshot shows the 'Document List' screen of the PFOB App. At the top, there are 'Query' and 'Document List' tabs. The 'Query' tab is active, displaying fields for 'Document Type Group' (All), 'Document Type' (All), 'Keyword' (empty), and a 'Full Text' search bar. Below these are 'CLEAR' and 'FIND' buttons. The 'Document List' tab is also active, showing a list of search results:

- Cover Letter for SAM HASTINGS
- Cover Letter for SAM HASTINGS
- Cover Letter for SAM HASTINGS
- Check for in the amount of - Invoice #:
- Check for in the amount of - Invoice #:
- Check for in the amount of - Invoice #:
- Check for in the amount of - Invoice #:
- Check for in the amount of - Invoice #:

At the bottom of the screen are 'PREVIEW', 'SETTING', and 'PRINT' buttons. A blue circle with the number '1' points to the 'Logout' icon in the top right corner. A blue circle with the number '2' points to the first result in the list. A blue circle with the number '3' points to the 'CLEAR' button.

1. Click here for Logout.
2. Result as per search criteria.
3. Click on "CLEAR" button to clear all selections and Results



#### **4. Search for the Document to Print**

There are multiple ways to Search the documents as provided in OnBase. We can search for the document by applying the following filters: -

1. Document Type Group
2. Document Type
3. Keyword Values including Wildcard(\*)
4. Full Text Search including Wildcard(\*)
5. Combination of the any /all the above Document filters



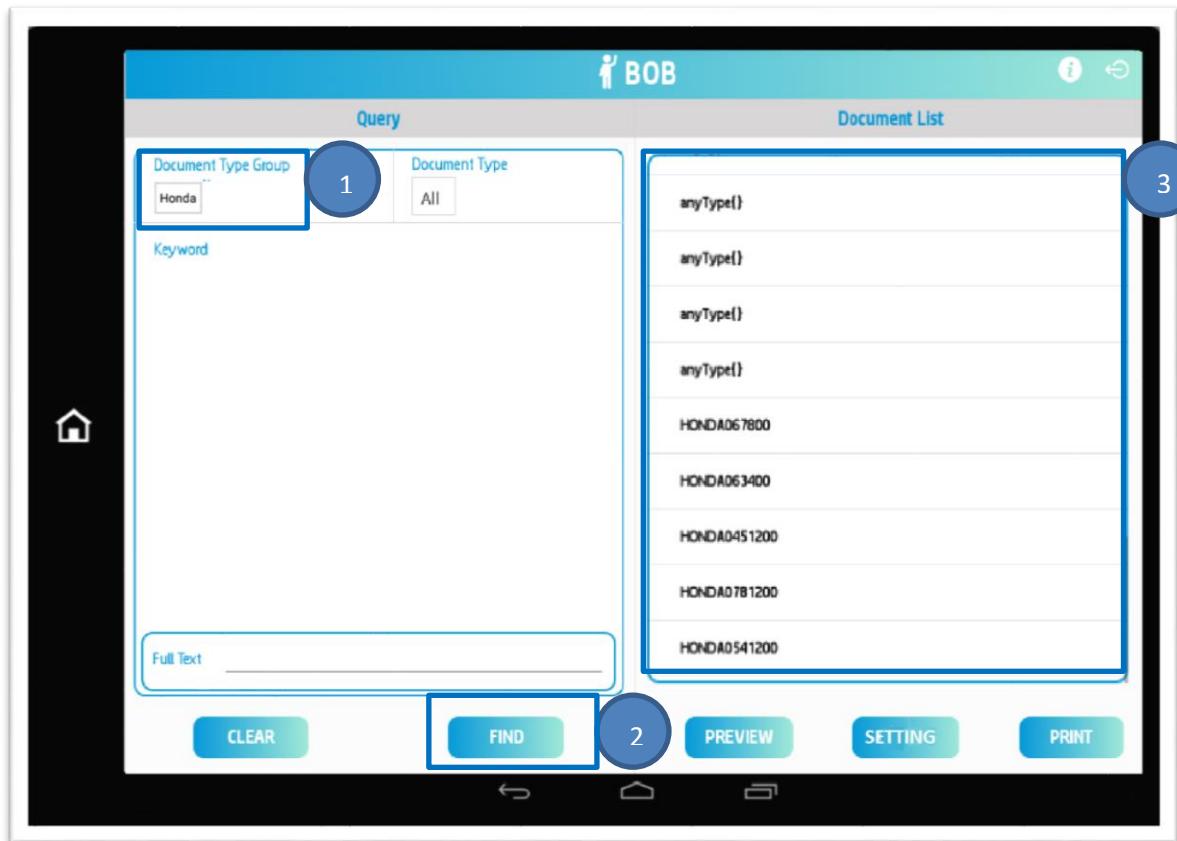
#### 4.1. Search by Document Type Group

By default, “All” is selected in the dropdown list of “Document Type Group”. User can select a particular “Document Type Group” from the dropdown list to retrieve all documents of the particular “Document Type Group”.

The screenshot shows the BOB mobile application interface. At the top, there's a navigation bar with icons for Home, Logout, and Refresh. Below it is a header with the text "Query" and "Document List". The main area is divided into two sections: "Query" on the left and "Document List" on the right. In the "Query" section, there are two dropdown menus: "Document Type Group" (which is currently set to "All" and has a blue border) and "Document Type" (also set to "All"). Below these are fields for "Full Text" search and buttons for "CLEAR", "FIND", "PREVIEW", "SETTING", and "PRINT". The "Document List" section is currently empty, showing a blank white space.

1. “Document Type Group” dropdown list.

This Result is based on the user rights and privileges in OnBase.



1. Selected “Document Type Group”.

2. Click “FIND” button to get the required documents in “Document list pane”.

3. Result as per search criteria.



## 4.2. Search by Document Type

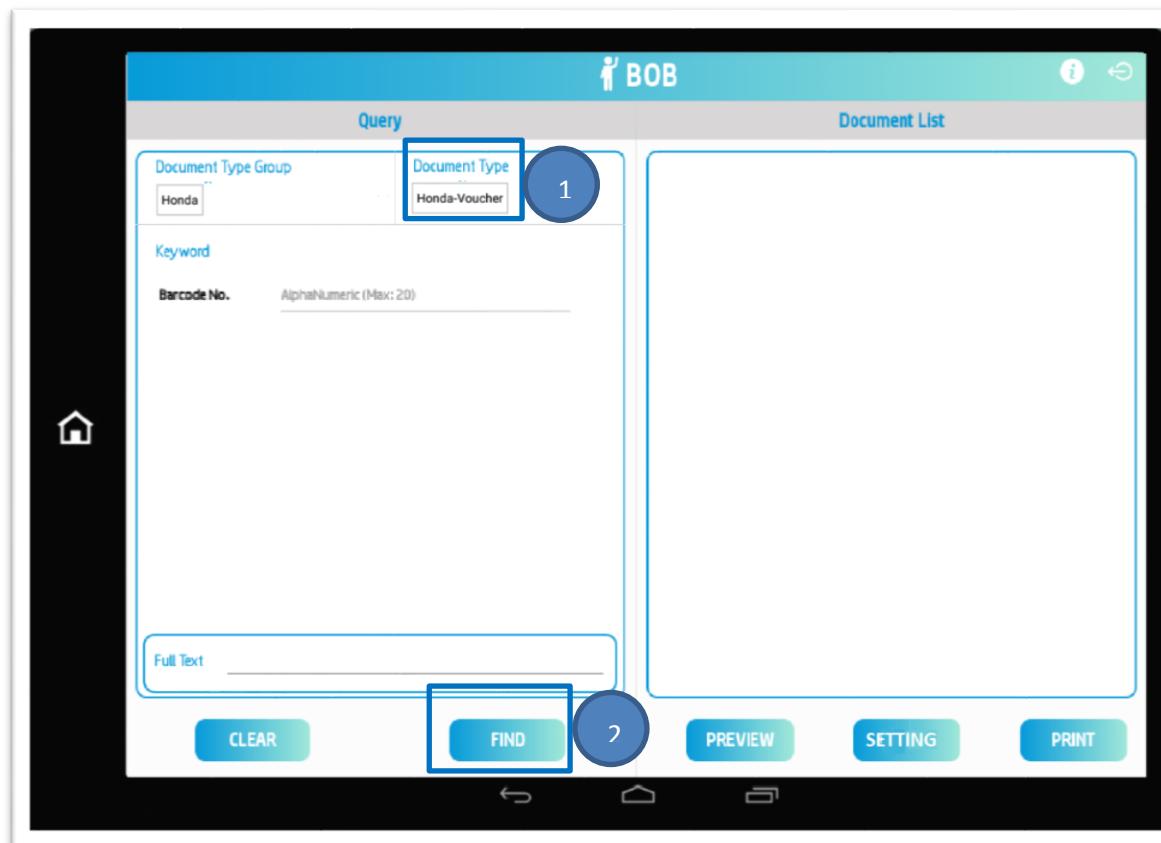
Upon Selection of a particular “**Document Type Group**”, all corresponding “**Document Types**” to which the user has access in OnBase will be displayed in dropdown List.



1. Selected “**Document Type Group**”.
2. “**Document Type**” Dropdown list.



User can select a particular “Document Type” from the dropdown list & click “FIND” button to retrieve all documents of the particular “Document Type”.



1. Selected “Document Type”.

2. Click “FIND” button to get the required documents in “Document list pane”.



This Result is based on the user rights and privileges in OnBase.

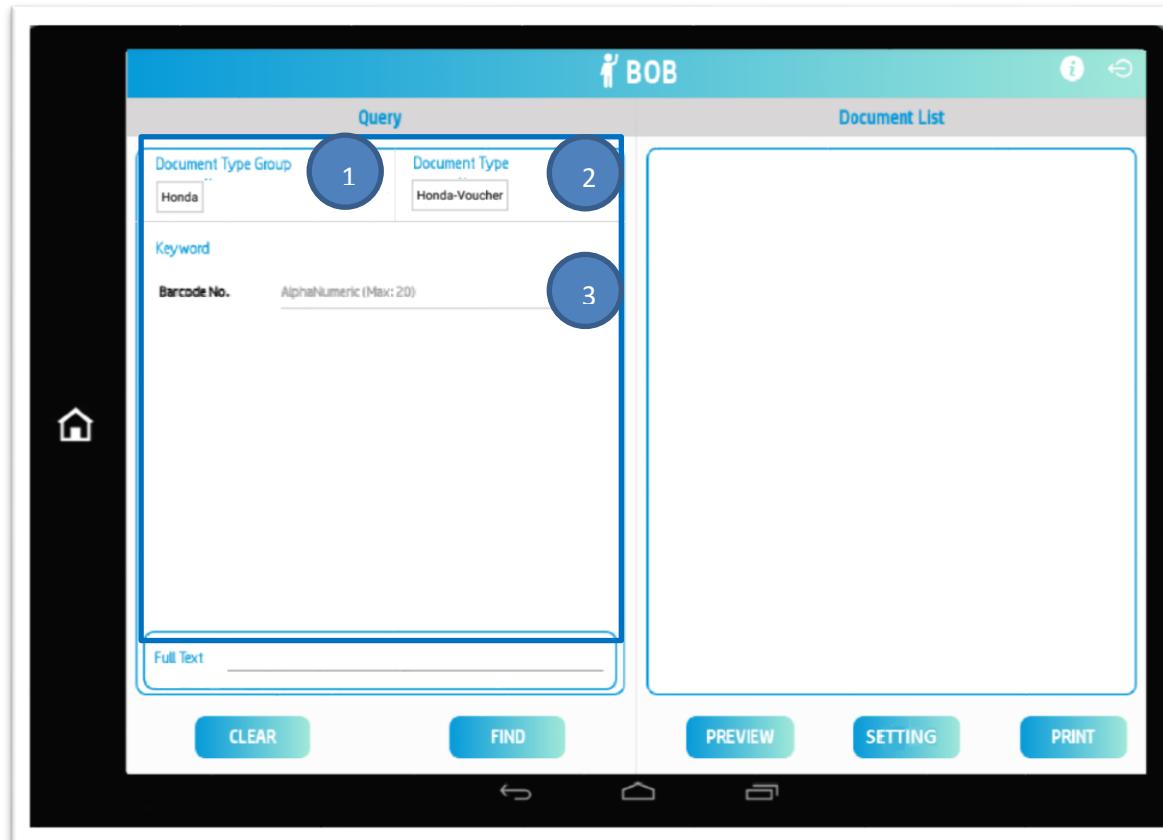
The screenshot shows the BOB (OnBase) mobile application interface. On the left, the 'Query' section contains fields for 'Document Type Group' (set to 'Honda'), 'Document Type' (set to 'Honda-Voucher'), 'Keyword' (empty), 'Barcode No.' (empty), and 'Full Text' (empty). Below these fields are 'CLEAR', 'FIND', 'PREVIEW', 'SETTING', and 'PRINT' buttons. On the right, the 'Document List' section displays a list of document entries. A blue circle with the number '1' is positioned above the first entry in the list. The entries are:

- anyType{}
- anyType{}
- anyType{}
- anyType{}
- HONDA067800
- HONDA063400
- HONDA0451200
- HONDA0781200
- HONDA0541200

1. Result as per search criteria.

#### 4.3. Search by Keyword Value

Upon selection of a particular “Document Type”, all corresponding “Keywords” related to the selected “Document Type”, will be displayed in the “Keyword panel”.



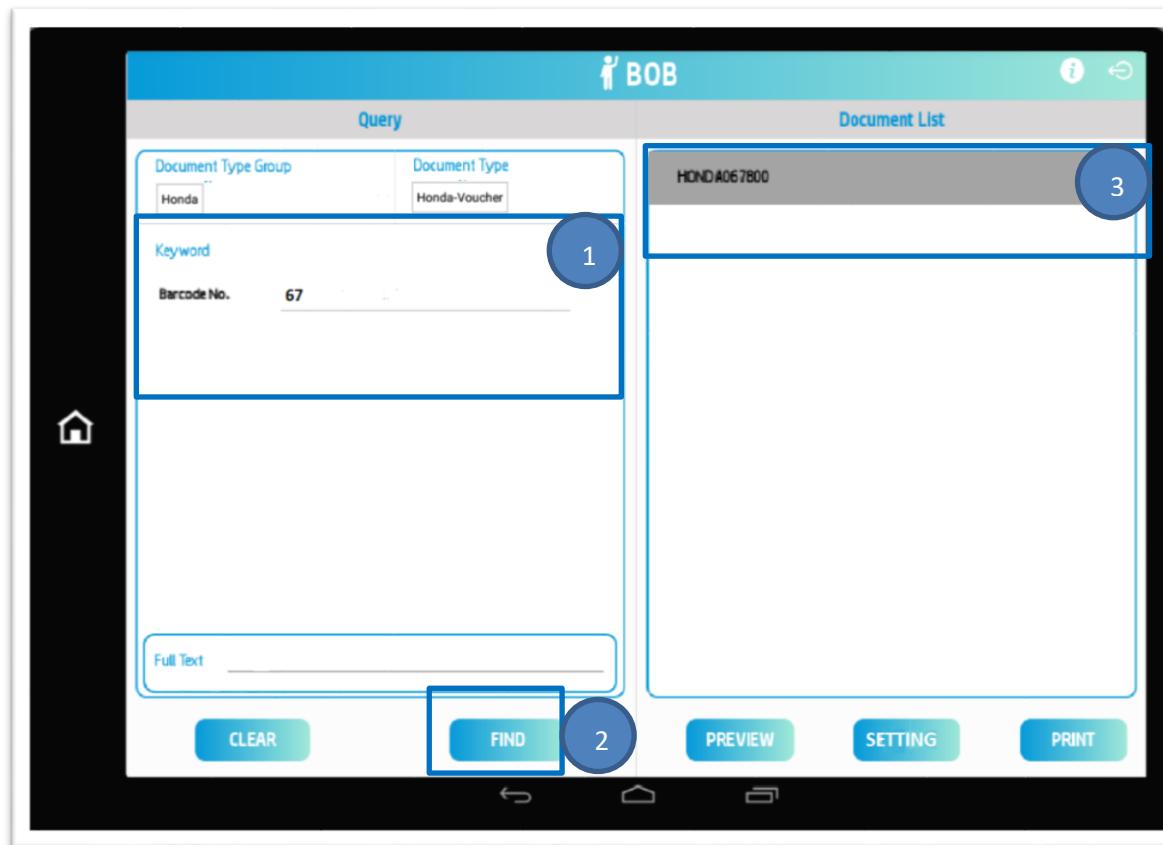
The screenshot shows the BOB app interface with the following elements:

- Query Section:** On the left, there are two dropdown menus:
  - Document Type Group:** Set to "Honda". (Circled with number 1)
  - Document Type:** Set to "Honda-Voucher". (Circled with number 2)
- Keyword Panel:** A text input field labeled "Barcode No." with the placeholder "AlphaNumeric (Max: 20)". (Circled with number 3)
- Document List:** A large empty area on the right labeled "Document List".
- Bottom Buttons:** A row of buttons: CLEAR, FIND, PREVIEW, SETTING, and PRINT.

Three callout boxes on the right side provide instructions:

1. Selected “Document Type Group”.
2. Selected “Document Type”.
3. Keyword panel – Enter the Keyword values here.

User needs to provide the “Keywords value/s” from the MFD keyboard and click “FIND” button to retrieve all documents of the particular “Document Type” with the matching “Keywords value/s”.



1. Enter one or more “**Keyword Values**” for searching here.
2. Click “**FIND**” button to get the required documents in “**Document list pane**”.
3. Result as per search criteria.

#### 4.4. Search by Full – Text

User can search for the document from the OnBase Repository by entering Exact Match Text or Wildcard (\*) Text in Full-Text Field. For example: - We are searching for “**Document Type Group**” Honda, “**Document Type**” Honda-Voucher with “**Full Text Value**” – HONDA\* and click on “**FIND**” button to get the document list (Honda-Voucher) list result.



The screenshot shows the BOB (OnBase) application interface. The top navigation bar has a logo and the text "BOB". Below it, the main area is divided into two panes: "Query" on the left and "Document List" on the right. In the "Query" pane, there are dropdown menus for "Document Type Group" (set to "Honda") and "Document Type" (set to "Honda-Voucher"). Below these are fields for "Keyword" (empty) and "Barcode No." (empty, with a note "AlphaNumeric (Max: 20)"). At the bottom of the "Query" pane is a "Full Text" input field containing "HONDA\*". To the right of this input field are five buttons: "CLEAR", "FIND", "PREVIEW", "SETTING", and "PRINT". A blue circle labeled "1" points to the "Full Text" input field. A blue circle labeled "2" points to the "FIND" button. A blue circle labeled "3" points to the "Document List" pane, which displays a list of document codes: HONDA067800, HONDA063400, HONDA0451200, HONDA0781200, and HONDA0541200.

1. Enter the Wildcard (\*) text here for searching the documents.
2. Click “FIND” button to get the required documents in “Document list pane”.
3. Document List as per search



If no document is present in OnBase that contains the Full Text Search word, then after clicking on “FIND” button a pop up will show in the bottom with message i.e. “Document Not Found”.

The screenshot shows the OnBase mobile application interface. At the top, there is a header with the 'i BOB' logo. Below the header, there are two input fields: 'Document Type Group' and 'Document Type', both set to 'All'. Underneath these fields is a 'Keyword' input field containing the text 'Jo'. Below the keyword input is a search bar with the text 'Full Text Jo'. To the right of the search bar are five buttons: 'CLEAR', 'FIND', 'PREVIEW', 'OPTION', and 'PRINT'. A blue circle with the number '1' is overlaid on the 'FIND' button. A callout bubble points from this circle to a message box at the bottom right of the screen that says 'No Document Found.'.

#### 4.5. Search using Combination of Document Parameters

User can use a combination of “Document Type Group”, “Document Type”, “Keyword Value’s” and “Full Text”.

For example: - We are searching for “Document Type Group” Honda, “Document Type” Honda-Voucher “Keyword Value” Name – 67\* with “Full Text Value” –HONDA\* and click on “FIND” button to get the document list (APP - Cover Letter) result.



The screenshot shows the BOB app interface for document search. On the left, the "Query" section contains:

- "Document Type Group": Honda (highlighted with a blue circle labeled 1)
- "Document Type": Honda-Voucher
- "Keyword": Barcode No. 67 (highlighted with a blue circle labeled 2)
- "Full Text": HONDA\* (highlighted with a blue circle labeled 3)

On the right, the "Document List" section displays a single result: HONDA067800 (highlighted with a blue circle labeled 4). Below the list are buttons for PREVIEW, SETTING, and PRINT.

1. Enter Keyword value here.
2. Enter Full Text Search value here.
3. Click “FIND” button to get the required documents in “Document
4. Document List as per search criteria.



## 5. Document Preview

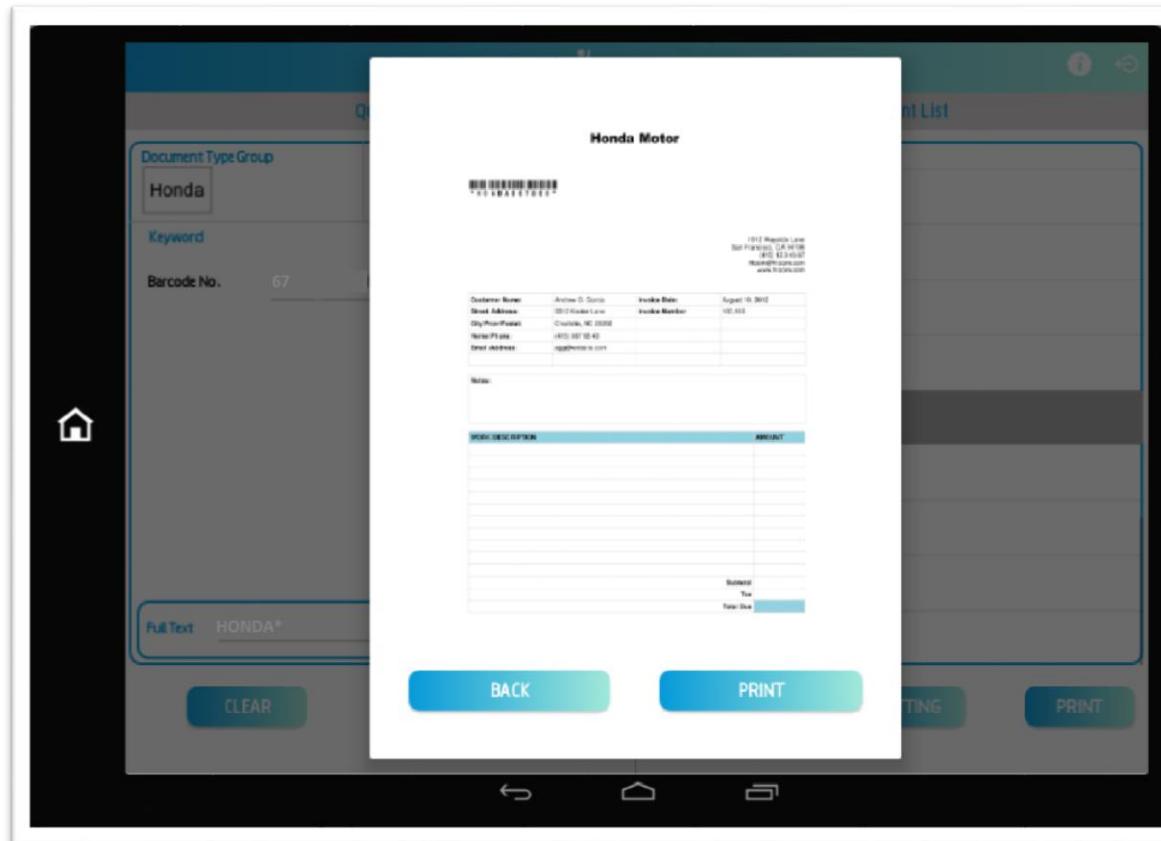
Upon selection of the document from the Document List Panel, Click on “PREVIEW” button for preview the document before print.

The screenshot shows the BOB mobile application interface. On the left is the 'Query' panel, which includes fields for 'Document Type Group' (set to 'Honda'), 'Document Type' (set to 'Honda-Voucher'), 'Keyword' (set to 'HONDA\*'), and a 'Barcode No.' field containing '67'. Below these are 'CLEAR' and 'FIND' buttons. On the right is the 'Document List' panel, which displays a single document entry with the identifier 'HONDA067800'. At the bottom of the 'Document List' panel are three buttons: 'PREVIEW', 'SETTING', and 'PRINT'. A blue circle labeled '1' points to the 'PREVIEW' button. A blue circle labeled '2' points to the document entry in the list. To the right of the 'Document List' panel, two numbered steps are described:

1. Selected document from the Document List Panel
2. Click “PREVIEW” button to view the document before print.

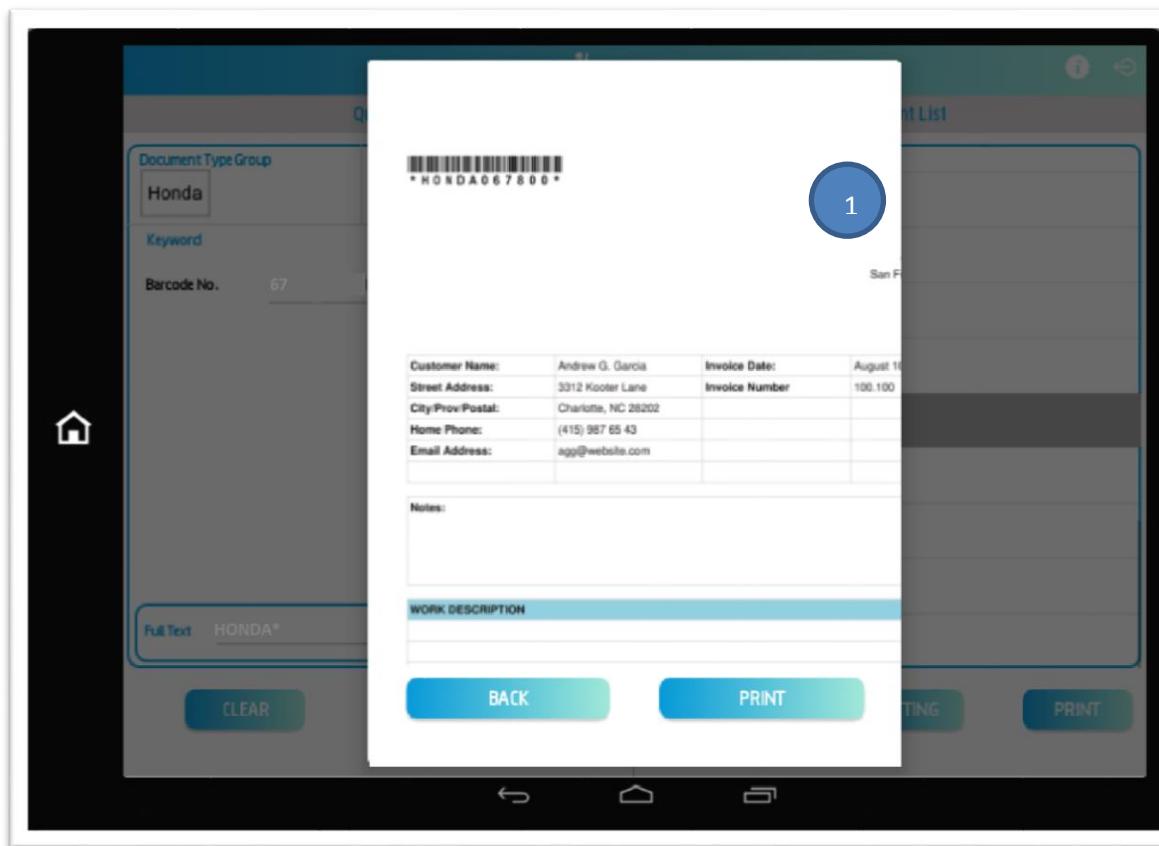


Upon clicking “PREVIEW” button, selected document will be displayed in the pop up screen.

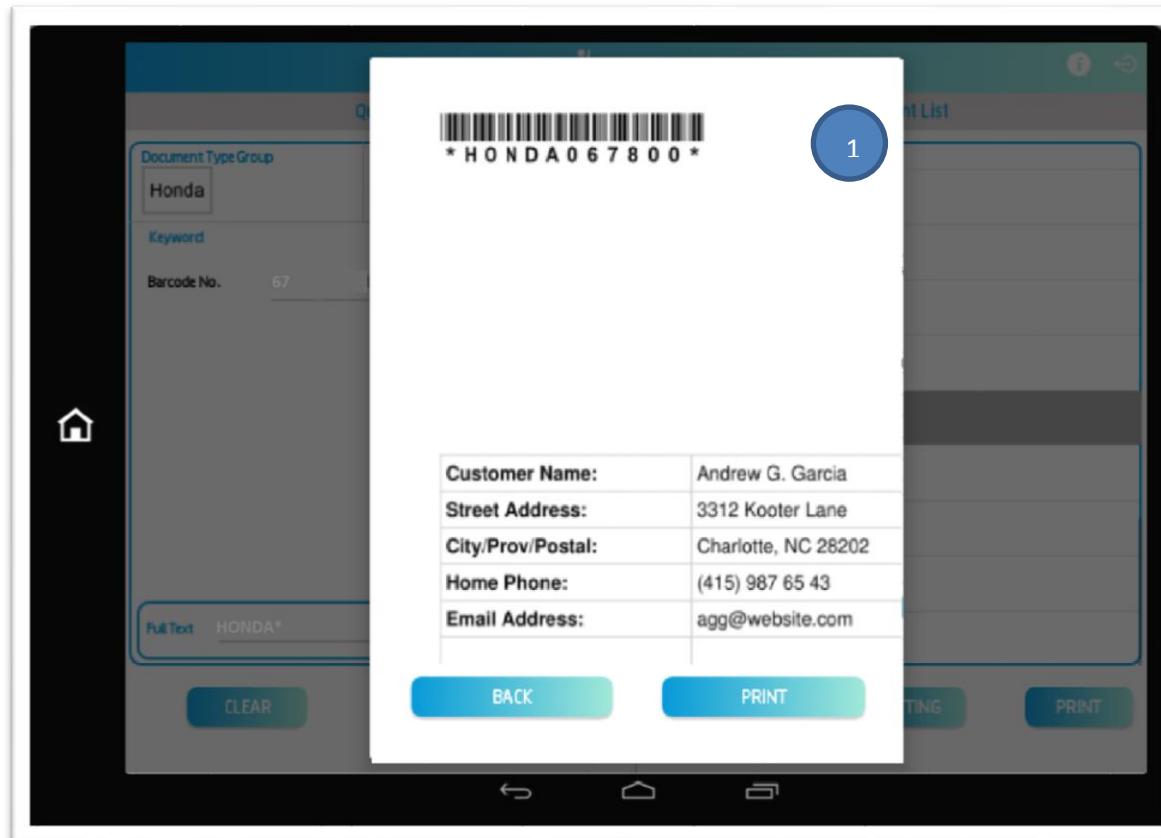




User can zoom the document by double clicking over the document. “Zoom In” functionality will be performed up to 2 levels.

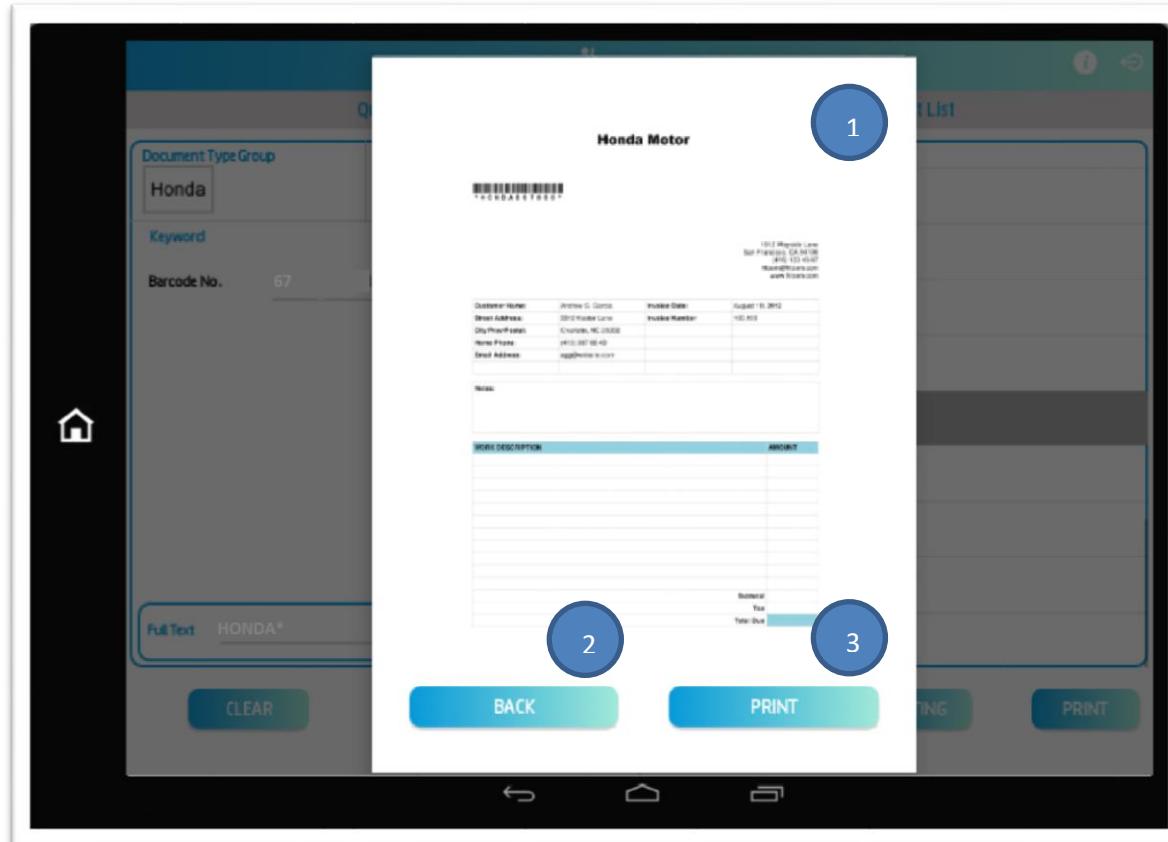


1. Double click once on the area to “Zoom In” on the Document



1. Double click again on the area to "Zoom In" on the Document

User can “Zoom In” up to two levels. The user can double clicks third time to “Zoom out” and the display will come to its original state.



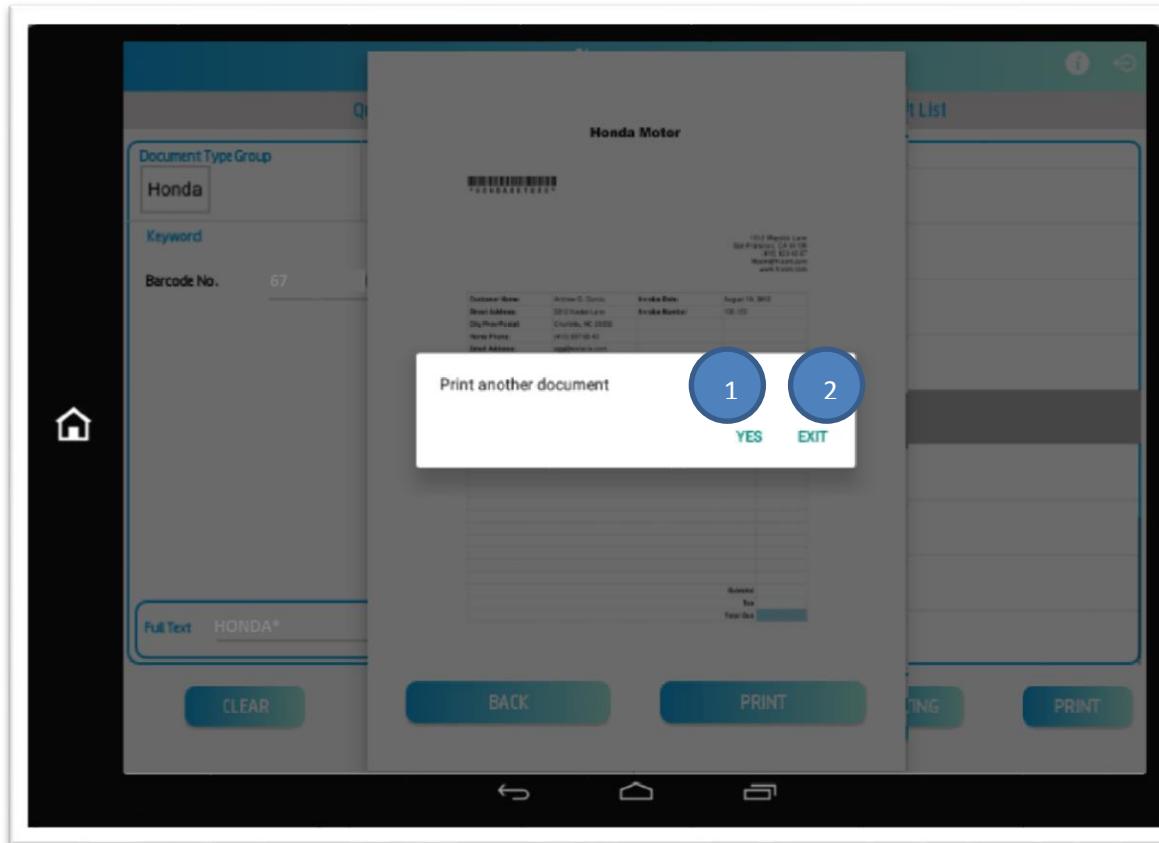
1. “Zoom Out” Document.

2. Click on “BACK” button to go to the previous screen.

3. Click on “PRINT” button to print the document.



Once the job is successfully completed, a pop-up will be displayed “Print another document” with 2 options. If you want to print another document, Click on “Yes” button or click on “Exit” to go back to the HP - MFD Home Screen.



1. Click on “Yes” button to print another document.
2. Click on “Exit” button to go back to the HP - MFD Home Screen.

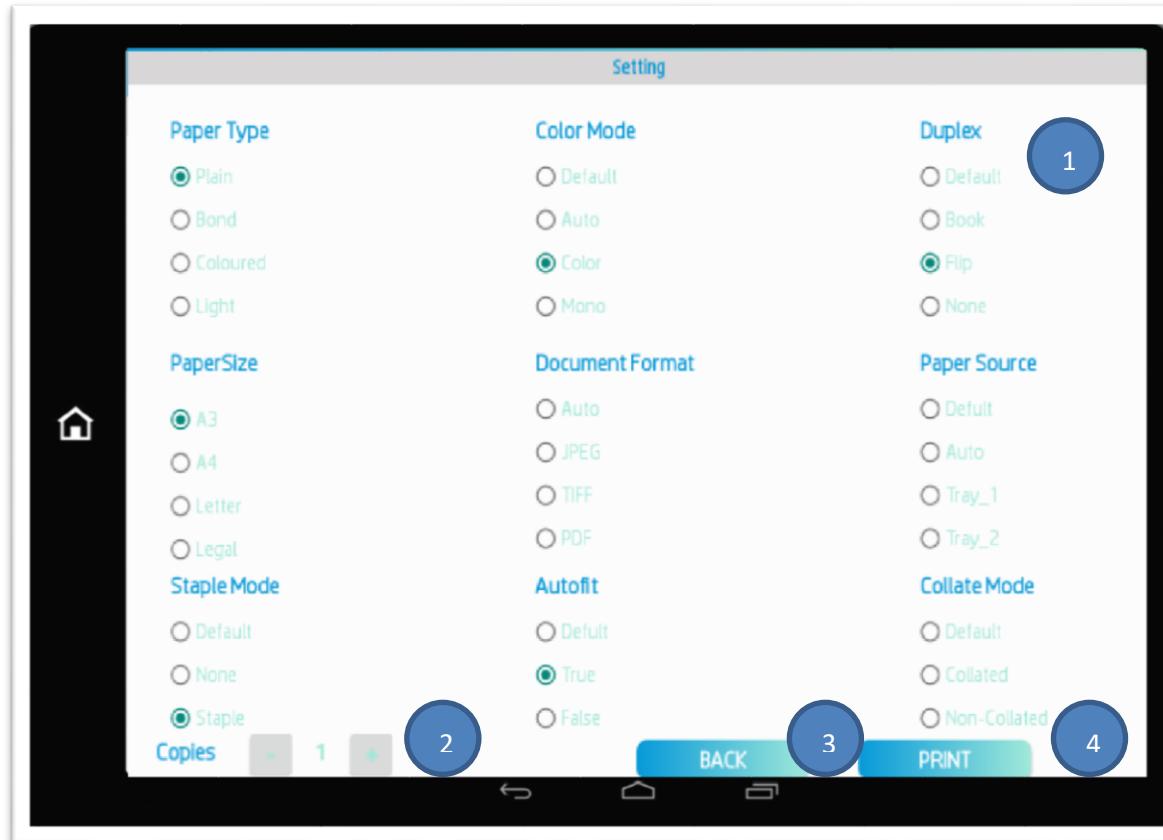


## 6. Change Default Print Settings

Upon Clicking “OPTION” button, Print setting Screen will be displayed.

The screenshot shows the BOB app interface. On the left, there's a 'Query' section with fields for 'Document Type Group' (set to 'Honda'), 'Document Type' (set to 'Honda-Voucher'), 'Keyword' (containing 'HONDA\*'), and a 'Barcode No.' field with '67'. Below these are 'CLEAR' and 'FIND' buttons. On the right, a 'Document List' panel displays a single item: 'HONDA067800'. At the bottom of this panel are three buttons: 'PREVIEW', 'SETTING', and 'PRINT'. A blue circle labeled '1' is positioned over the document title 'HONDA067800'. A blue circle labeled '2' is positioned over the 'SETTING' button.

1. Selected document from the Document List Panel
2. Click “SETTING” button to change the print setting of the print job.



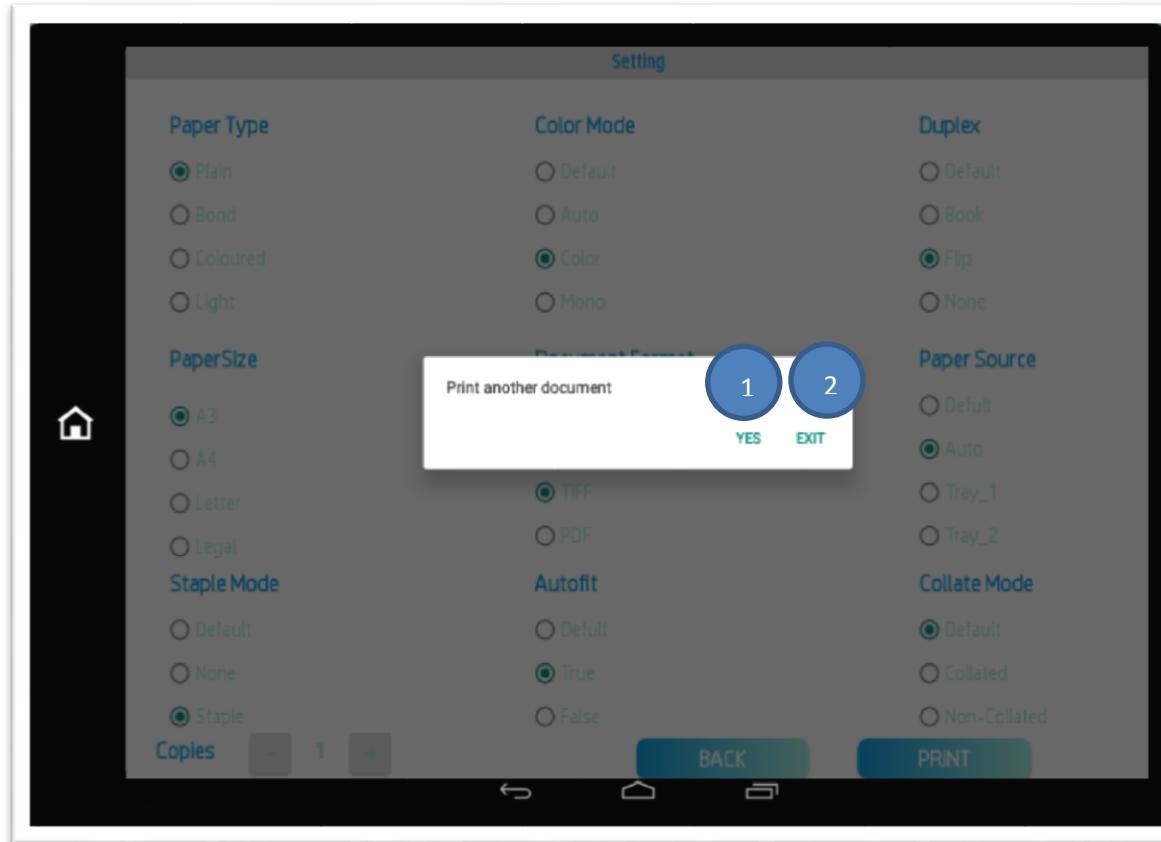
1. User can change the print setting of the print job from default settings, if required.

2. Set no. of “Copies”

3. Click on “Back” button to go back to the Previous Screen.

4. Click on “PRINT” button to print the document.

Once the job is successfully completed, a pop-up will be displayed “Print another document” with 2 options. If you want to print another document, Click on “Yes” button or click on “Exit” to go back to the HP - MFD Home Screen.

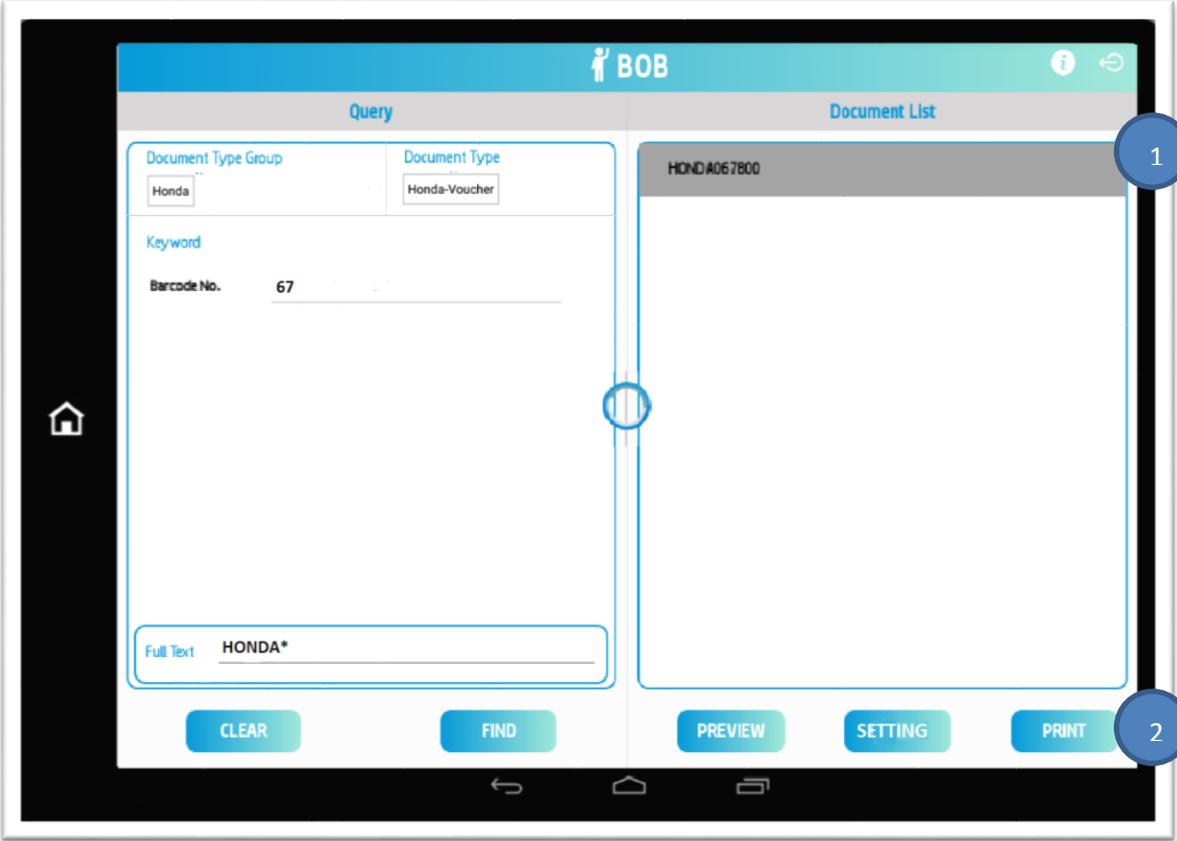


1. Click on “Yes” button to print another document.

2. Click on “Exit” button to go back to the HP - MFD Home Screen.

## 7. Direct Document Print

Click “PRINT” button, to print the selected Document with default Print settings.

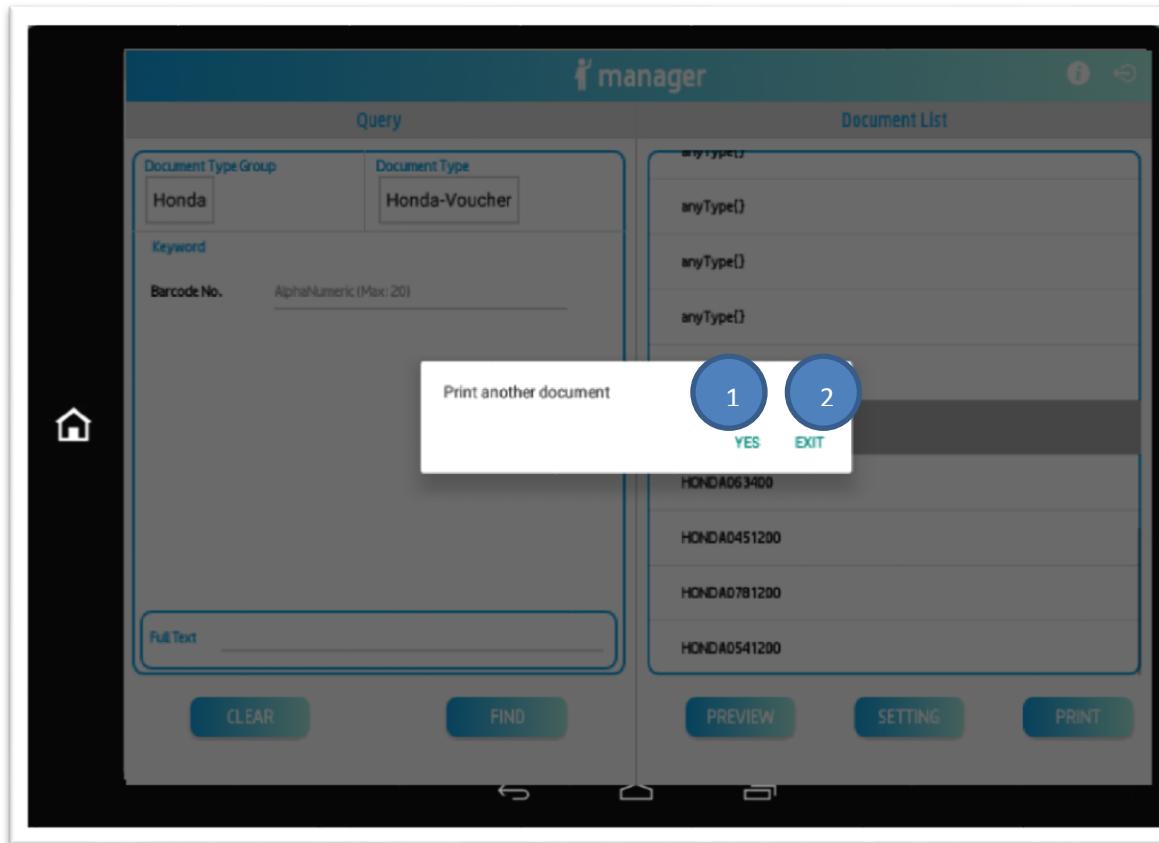


The screenshot shows the PFOB App interface. On the left, there is a search bar with fields for "Document Type Group" (Honda), "Document Type" (Honda-Voucher), "Keyword" (Barcode No. 67), and "Full Text" (HONDA\*). Below the search bar are buttons for "CLEAR", "FIND", "PREVIEW", "SETTING", and "PRINT". A blue circle labeled "1" highlights the "HONDA067800" entry in the "Document List" panel. A blue circle labeled "2" highlights the "PRINT" button at the bottom of the screen. To the right of the interface, two numbered steps provide instructions:

1. Selected document in the Document List Panel
2. Click on “PRINT” button to print the document.



Once the job is successfully completed, a pop-up will be displayed “Print another document” with 2 options. If you want to print another document, Click on “Yes” button or click on “Exit” to go back to the HP MFD Home Screen.

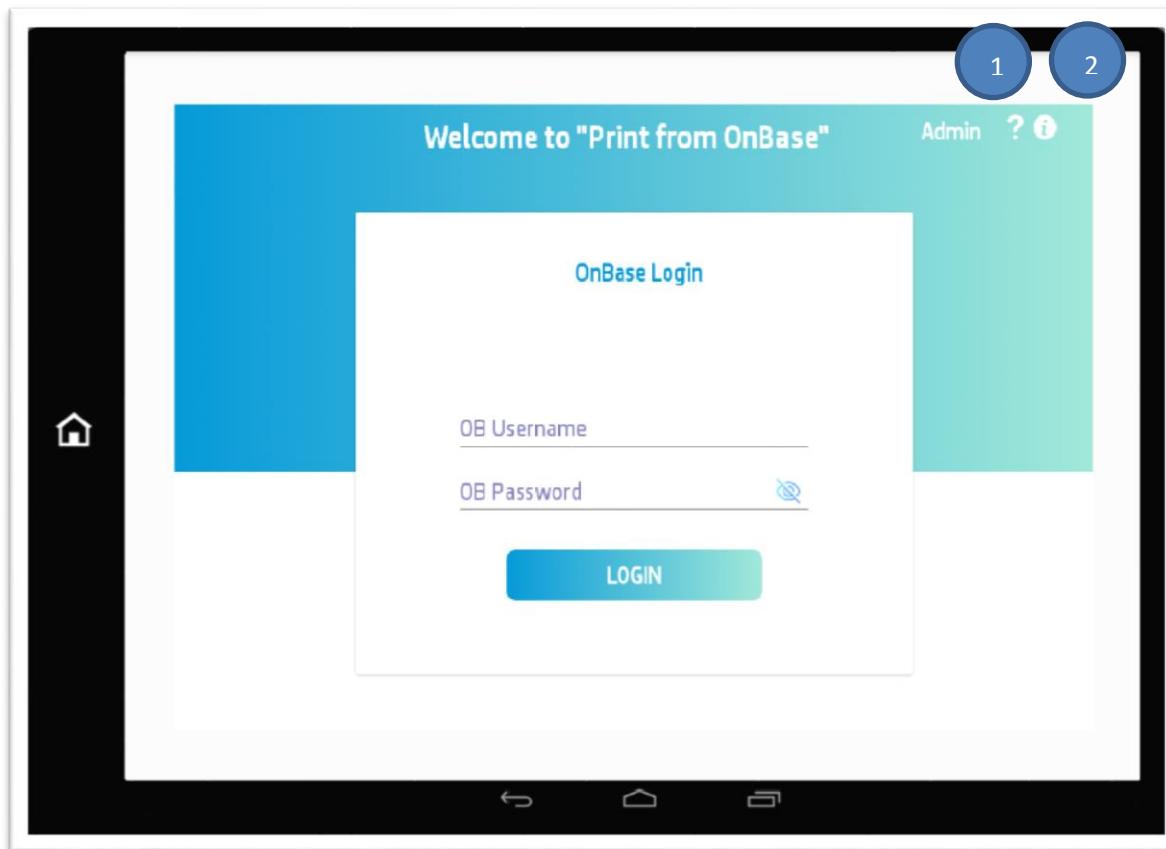


1. Click on “Yes” button to print another document.

2. Click on “Exit” button to exit to the HP MFD Home Screen.

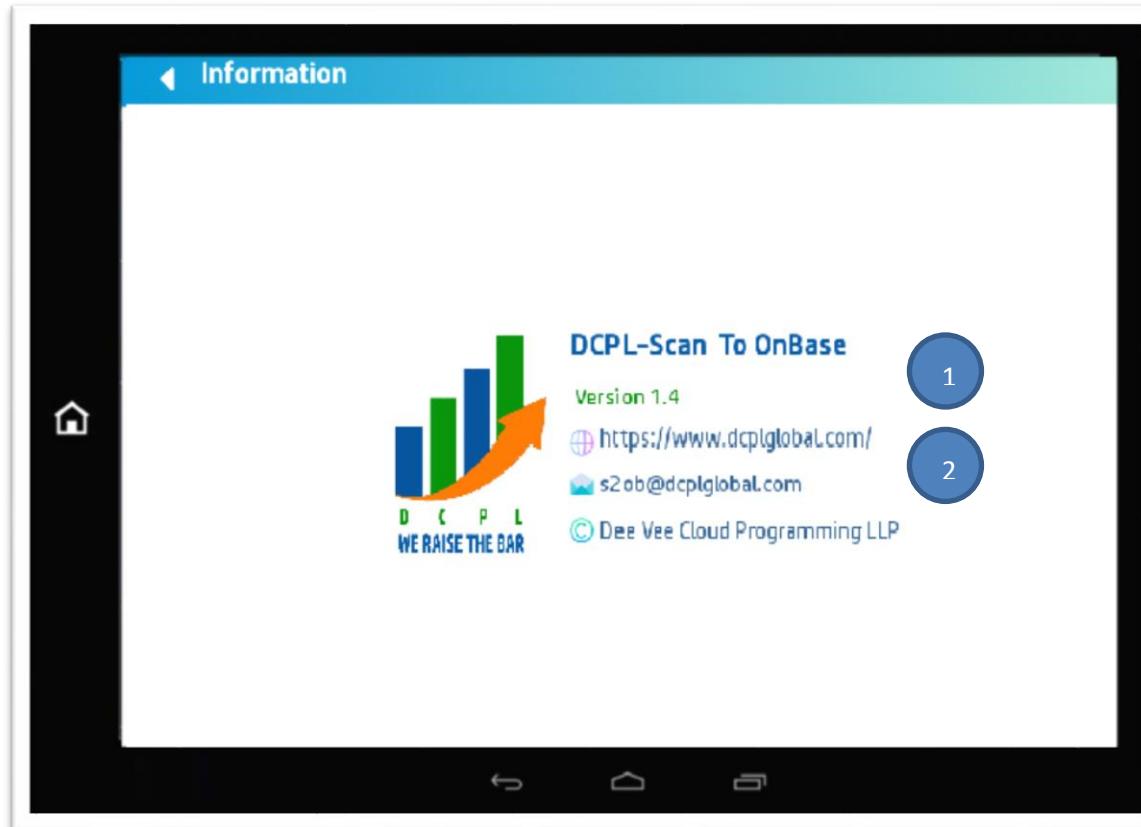


## 8. Application Information



1. Click “**i**” icon to know the “Print from OnBase” Application information.

2. Click “**?**” icon to view the User Guide of “Print from OnBase”



1. Version of “Scan to OnBase” application installed is displayed here.
2. For any information about this Application, you can contact us on our Email id or visit our website.