OnBase®
Foundation EP5

Integration for Microsoft Search

Reference Guide

Includes:

Installation Guide

Administration Guide

User Guide

Copyright

Document Name .... Integration for Microsoft Search

Department/Group .... Documentation

Revision Number .... Foundation EP5

OVERVIEW

INSTALLATION GUIDE

INSTALLATION

USER GUIDE

USAGE

VIEWING DOCUMENTS

OVERVIEW

The Integration for Microsoft Search module enables users to full-text search documents in the OnBase repository through the Microsoft SharePoint® interface. The documents returned in the search are displayed as hyperlinks. When a hyperlink is clicked, the document is viewed through the OnBase viewer. All the functionality associated with the OnBase viewer—including notes, cross-referencing, and keyword viewing—is available.

Documents are configured for searching by means of Content Sources. Content Sources are groupings of documents, Document Types, and Document Type Groups. These Content Sources are automatically associated with Microsoft SharePoint to make their contents available for full-text or metadata searching. Content Sources are configured in the OnBase Configuration module.

Once Content Sources are configured, they can be crawled by Microsoft SharePoint for full-text or metadata searching. Crawling is the process by which Microsoft SharePoint indexes information for searches. Crawls can be scheduled to automatically update the amount of content available for searching.

Applications

Integration for Microsoft Search allows employees who spend much of their day working in Microsoft SharePoint to search for and access documents in OnBase by means of a general search. For example, an organization may need to locate all documents surrounding an ISO certification. A general search for all documents, rather than specific searches for certain documents, is needed to ensure all the information is located. The ISO certification may have documentation stored in OnBase, collaborations existing in Microsoft SharePoint, and other content in a separate file system. A single federated search could return all of the information surrounding the certification, regardless of the storage method. This avoids the need for specific searches through each type of content storage method and ensures that all information searched for is displayed through one easy-to-use interface.

Licensing

This module requires licenses for the following:

- Integration for Microsoft Search
- Web Server
- Client

Check your current licensing status by selecting **Utils | Product Licenses** from the Configuration module.

OnBase®
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Installation Guide

Foundation EP5

Requirements

Note: Integration for Microsoft Search requires the OnBase Web Server and Application Server. See the **Web Server** and **Application Server** module reference guides for information on installing these servers.

The following sections outline requirement information specific to Integration for Microsoft Search in OnBase Foundation EP5.

General Requirements

For general requirement information that applies to Integration for Microsoft Search and other modules, see the sections on the following topics in the **Installation Requirements** manual:

- Microsoft .NET Framework Requirements

Note: The version of the Microsoft .NET Framework must be installed on the SharePoint server.

Third-Party Software

To use Integration for Microsoft Search, you must have one of the following Microsoft products installed:

- Microsoft SharePoint Server 2013
- Microsoft SharePoint Server 2016

Load Balancing

This module supports load balancing across multiple Web Servers and Application Servers. Load balancers must support either IP-based or cookie-based load balancing (also referred to as layer-3, layer-4, and layer-7 load balancing). Load balancers also must be configured to use persistent session (or sticky session) load balancing. For information about configuring your load balancer, refer to its documentation. For information about configuring OnBase modules for load balancing, refer to the Web Server module reference guide.

Crawling and Load Balancing

The Integration for Microsoft Search does not support load balancing across multiple Application Servers for the purpose of crawling documents. The server performing the crawl cannot communicate with the Application Server through a load balancer.

Licensing

See Licensing on page 1 for licensing requirements.

Pre-Installation

Before you begin installing Integration for Microsoft Search, note the following requirements:

- The OnBase Web Server and the SharePoint server must both belong to the same Internet Explorer security zone on client workstations in order for OnBase Web Parts to be displayed correctly in SharePoint.
- The OnBase Web Server and the SharePoint server must both use the same protocol: either HTTP or HTTPS. One server cannot use HTTP while the other uses HTTPS.
- If the OnBase Web Server and SharePoint server are installed in separate domains and the OnBase Web Server is configured for Active Directory authentication, then there must at least be a one-way trust from the OnBase domain to the SharePoint domain.
- The person who is installing Integration for Microsoft Search should log on to the SharePoint server under a user account that is both a machine administrator and a SharePoint farm administrator.
- Integration for Microsoft Search should be configured from the SharePoint server machine.
- Both the OnBase Web Server and the SharePoint server must be listed in the same Internet Explorer security zone (e.g., Local Intranet) on the machine where Integration for Microsoft Search is being configured.
- If multiple OnBase integrations for SharePoint are installed, ensure they are all on the same version.

If you need assistance with your installation, contact your first line of support.

Installer Options

Standard (EXE or MSI) Installers — There are two methods for running OnBase installers: Interactive and silent. An interactive installation requires user interaction with dialog boxes during the installation process. A silent installation does not require user interaction during the installation process.

OnBase installers may consist of both an executable file (**.exe**) and a Windows Installer Package file (**.msi**). When performing an interactive installation, and both an executable file and MSI are available, use the executable file to ensure a complete installation. The executable validates that all prerequisites are met before proceeding with the installation. If any missing prerequisites are identified, the installer alerts the user. Most missing prerequisites can be installed directly from the installer before continuing the installation process.

Note: The Microsoft .NET Framework prerequisite must always be installed separately before running either the EXE or MSI installer.

When performing a silent installation, and both an executable file and MSI are available, use the MSI. Since the MSI package does not validate prerequisites, you must ensure that Windows Installer 3.0 or greater is installed on each workstation and that all other prerequisites are met before running the MSI. If any prerequisites are not met, a silent installation from the MSI will fail without alerting the user.

For more information about configuring a silent installation, see https://docs.microsoft.com/en-us/windows/win32/msi/command-line-options.

ClickOnce Installers — Some OnBase modules are installed for deployment using ClickOnce. ClickOnce is a Microsoft technology that installs a deployment package to a central server. This package can then be accessed by users to install the application on their local workstations. The application is installed entirely under the user's profile, ensuring that it cannot interfere with other applications installed on the workstation.

ClickOnce deployments also have the following advantages:

- Previously installed versions of the module can be easily and automatically updated to the latest version with little or no user interaction, as long as the deployment server and deployment instance name are not changed.
- The module is installed on a per-user basis and does not require administrator privileges for local installation.
- There can be multiple instances of the module deployed, allowing for different versions of the module to be installed on a per-user basis, to match the version requirements of the workstation it is being installed to.

For more information on Microsoft's ClickOnce technology see https://docs.microsoft.com/en-us/visualstudio/deployment/clickonce-security-and-deployment.

Note: ClickOnce-deployed applications are not supported by Microsoft within a Remote Desktop environment.

OnBase modules that are deployed using ClickOnce should either take advantage of the ClickOnce deployment method as an alternative to a Remote Desktop deployment, or the module should be installed using a standard installer and deployed using the Remote Desktop methodology.

Note: Not all OnBase modules that support ClickOnce have a standard installer available. Contact your first line of support if you are unsure how to install and deploy a specific module.

User Account Control (UAC) — If Windows User Account Control (UAC) is enabled, the installer must be run with elevated administrator privileges, even if an administrator is currently logged on. This can be accomplished by right clicking on the installer executable and selecting **Run as Administrator** from the right-click menu. MSI files cannot be run using the **Run as Administrator** option. Instead, you must launch the MSI package using the command line. For more information on installing files through the command line, refer to your Microsoft support information or see https://docs.microsoft.com/en-us/windows/win32/msi/command-line-options.

Silent Installation Using setup.exe — If you are running setup.exe silently from the command line you must use the **/q** switch and the **/CompleteCommandArgs** switch, followed by the required command-line arguments.

The **q** switch specifies quiet mode and is required to suppress the GUI. The **CompleteCommandArgs** switch must be followed by the command-line parameters required to configure and install the desired components.

The complete string of command-line parameters must be included in double quotes after the **CompleteCommandArgs** switch. If a parameter in the string also requires double quotes, those quotes must be escaped using ****. For example: **setup.exe /q /CompleteCommandArgs "INSTALL_PROPERTY=\\"my value\\" INSTALL_PROPERTY_2=\\"my value 2\\""**.

Note: You should check the return value of the setup.exe process. A return value of **0** (zero) indicates success. Any other value returned may indicate that an error was encountered and the installation failed.

Installation for SharePoint 2016

This section describes how to install the search integration for Microsoft SharePoint Server 2016 and Microsoft Search Server 2016. To install the Integration for Microsoft Search, complete the following tasks:

- Importing the BDCM File (SharePoint 2016) on page 7
- Creating the Content Source (SharePoint 2016) on page 8
- Installing the Security Trimmer (SharePoint 2016) on page 10
- Turning Off Strict File Handling (SharePoint 2016) on page 14
- Configuring the OnBase Application Server (SharePoint 2016) on page 14
- Configuring the OnBase Web Server (SharePoint 2016) on page 16
- Installing OnBase Configuration Management (SharePoint 2016) on page 17

Importing the BDCM File (SharePoint 2016)

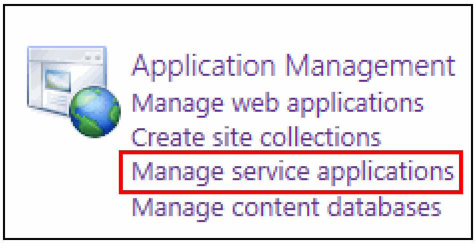
The **model.bdcm** file and the SharePoint **Business Data Connectivity Service** are used to install Integration for Microsoft Search for SharePoint 2016.

1. Double-click **model.bdcm**. This file is typically located in the **\x64\SharePoint\SharePoint 2016\Search** folder of your source installation files.
2. Find the Property Names **WcfMexDocumentUrl** and **WcfEndpointAddress**. Edit the Property Names to include your AppServer path.

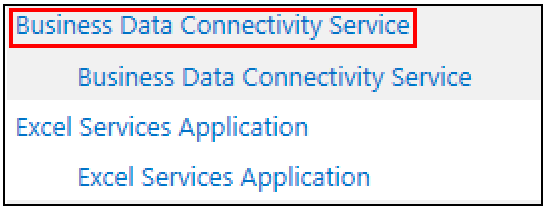
   The Property Names should look as follows:

   <Property Name="WcfMexDocumentUrl" Type="System.String">http://[AppServerPath]/SearchService.svc?singleWsdl</Property>

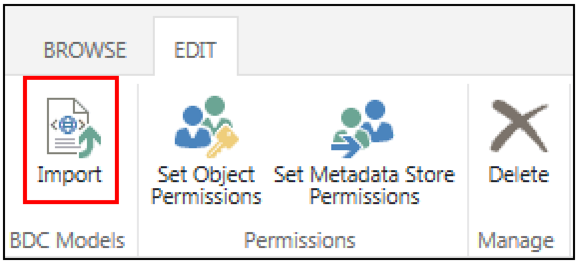
   <Property Name="WcfEndpointAddress" Type="System.String">http://[AppServerPath]/SearchService.svc</Property>
3. Save and close the **model.bdcm** file.
4. In SharePoint **Central Administration**, click **Manage Service Applications**.



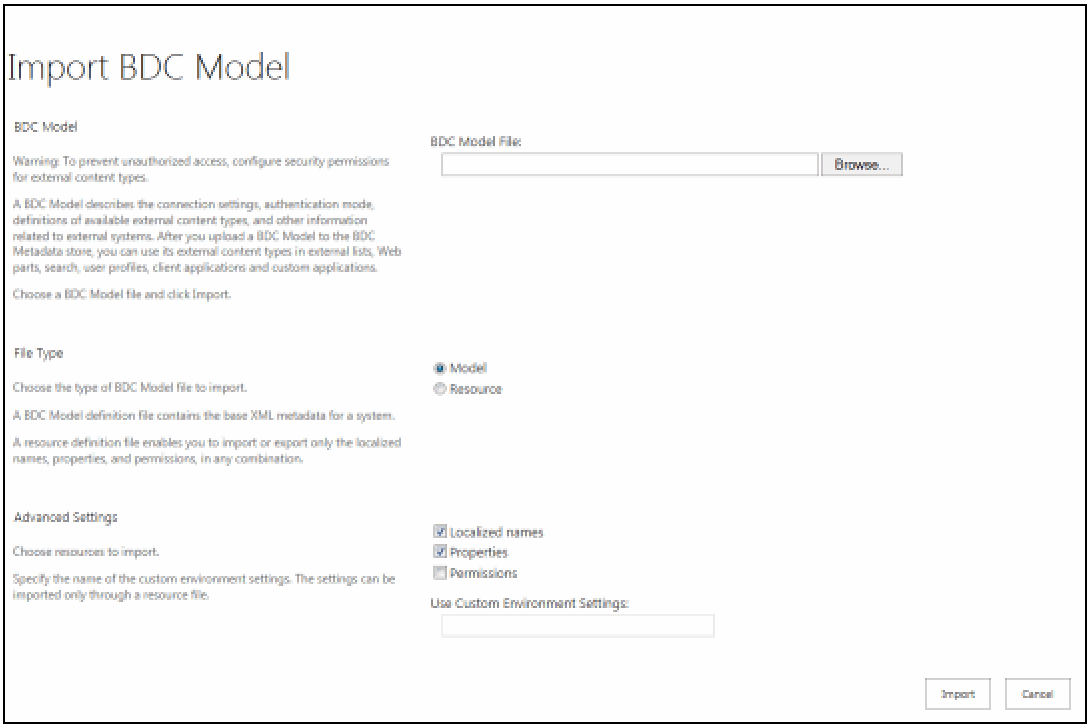
5. Click the first entry for Business **Data Connectivity Service**.



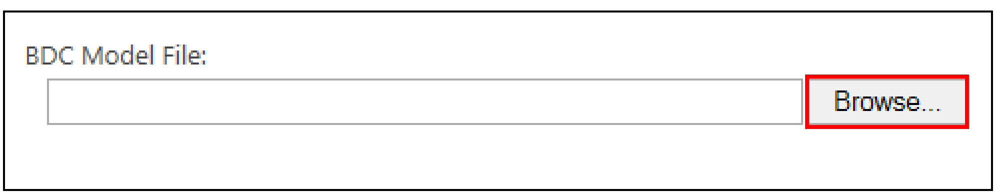
6. In the ribbon menu, click **Import**.



7. The **Import BDC Model** page is displayed.



8. Browse to find the **model.bdcm** file

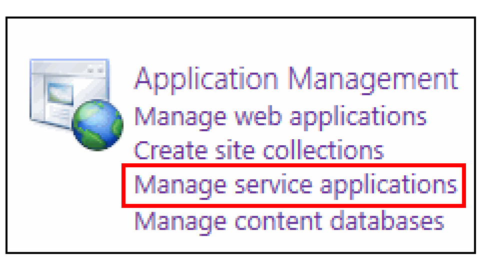


9. Click **Import**.

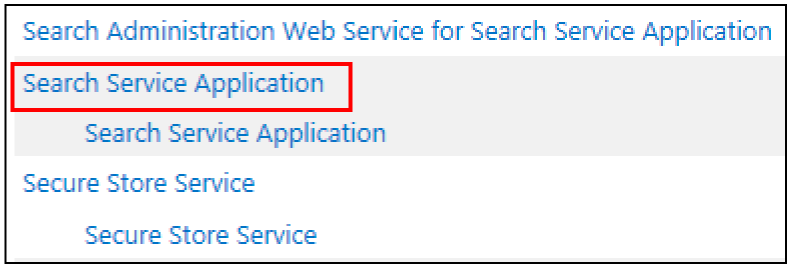
Creating the Content Source (SharePoint 2016)

The Content Source can be created from within Central Administration.

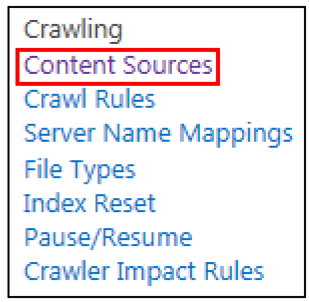
1. In Central Administration, click **Manage Service Applications**.



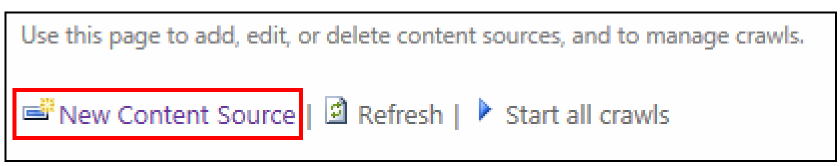
2. Click the first entry for **Search Service Application**.



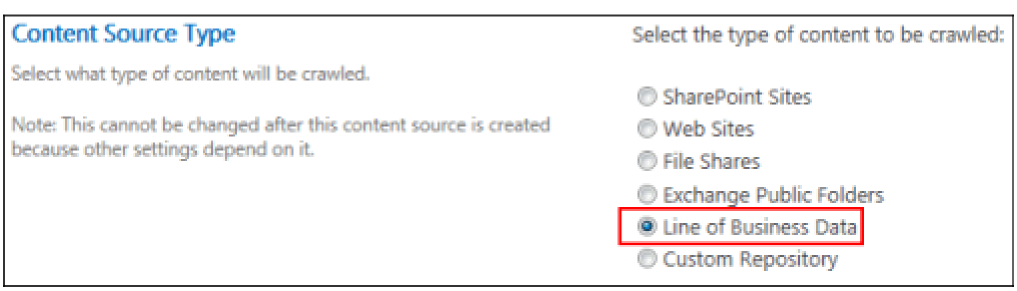
3. The **Search Service Application: Search Administration** screen is displayed. Under **Crawling**, click **Content Sources.**



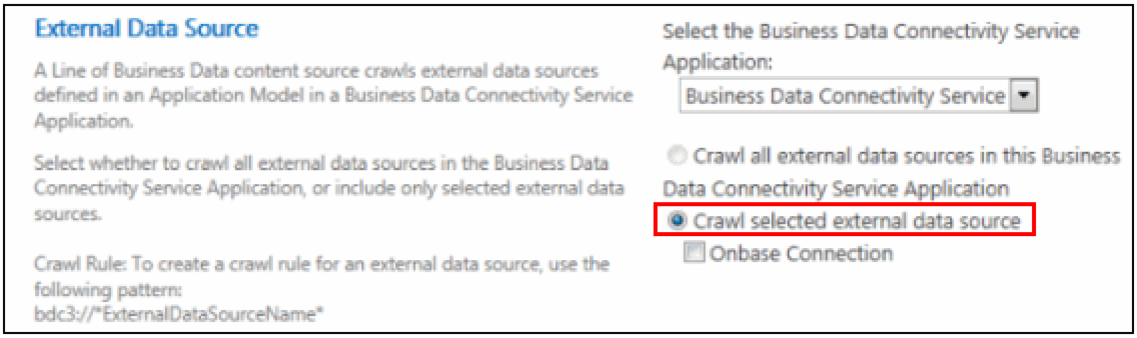
4. The **Search Service Application: Manage Content Sources** screen is displayed. Click **New Content Source**.



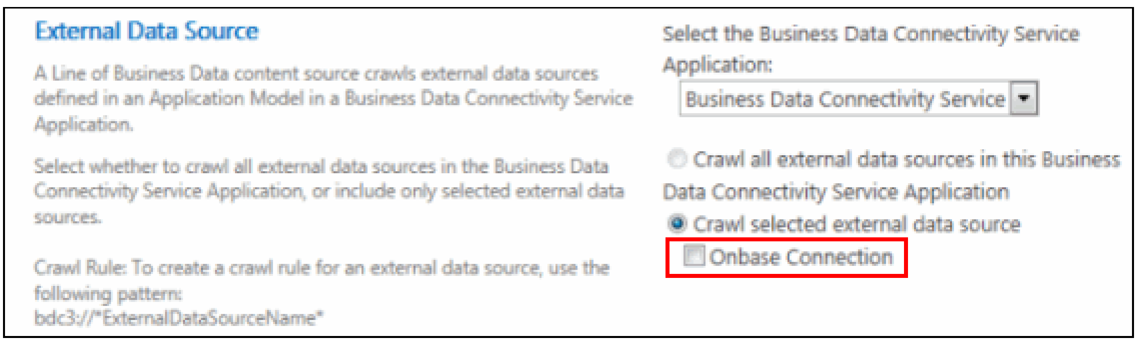
5. The **Search Service Application: Add Content Source** screen is displayed. Enter a **Name** for the Content Source.
6. Under **Content Source Type**, select **Line of Business Data**.



7. Under **External Data Source**, ensure **Crawl selected external data source** is selected.



8. Select **Onbase Connection** as the **External Data Source**.



9. Click **OK**.

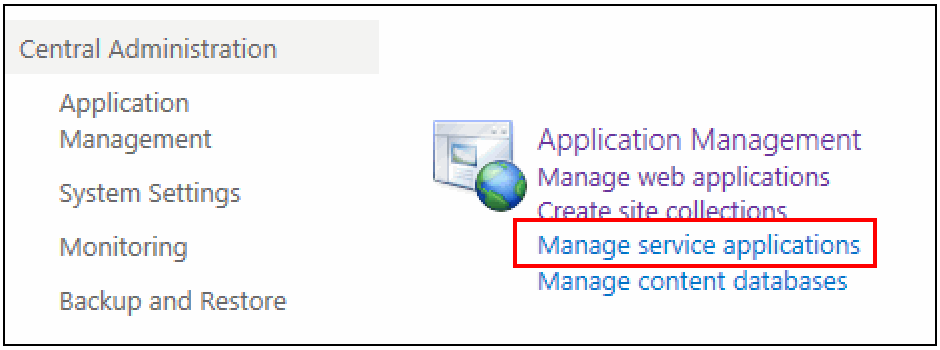
Installing the Security Trimmer (SharePoint 2016)

The Search Adapter security trimmer is an optional measure provided for increased security. It restricts SharePoint search results containing OnBase documents to show only those the logged in user has rights to view. It also removes deleted documents from search results immediately. These features help prevent users from seeing sensitive information contained in the Auto-Names of the returned results.

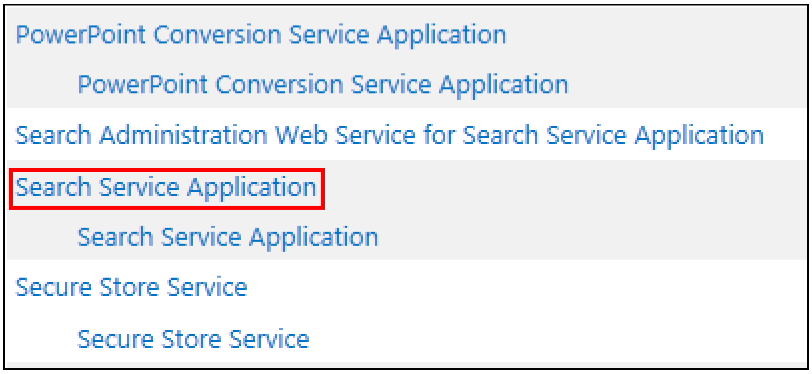
Note: This feature applies only to solutions configured for Active Directory authentication.

Please refer to the following article for more information: http://msdn2.microsoft.com/en-us/library/aa981473.aspx

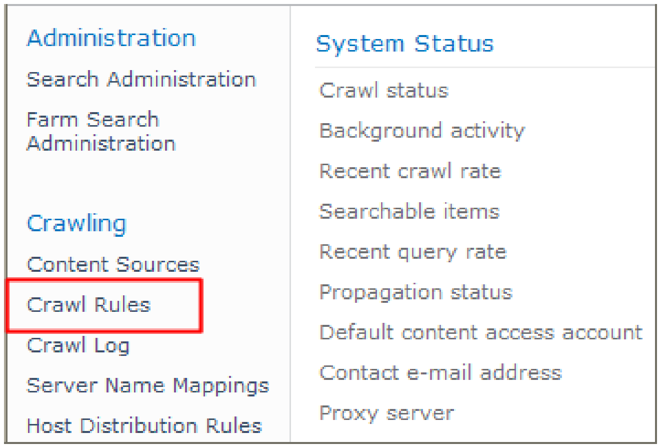
1. Install the Integration for Microsoft Search as described under Importing the BDCM File (SharePoint 2016) on page 7.
2. Create a crawl rule in SharePoint:
   a. Open Central Administration.
3. Under **Application Management**, click **Manage service applications**.



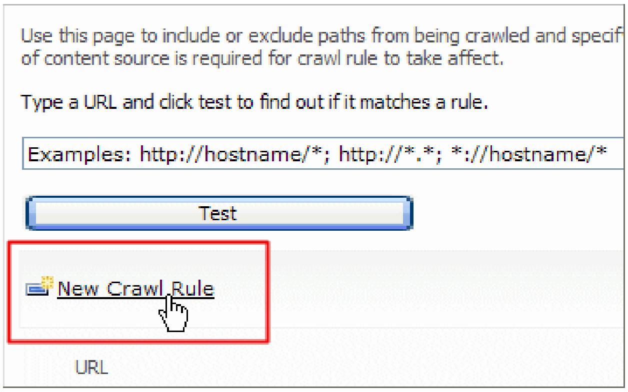
   b. Click **Search Service Application**.



c. Click **Crawl Rules** from the left side of the page.



d. Click **New Crawl Rule**.



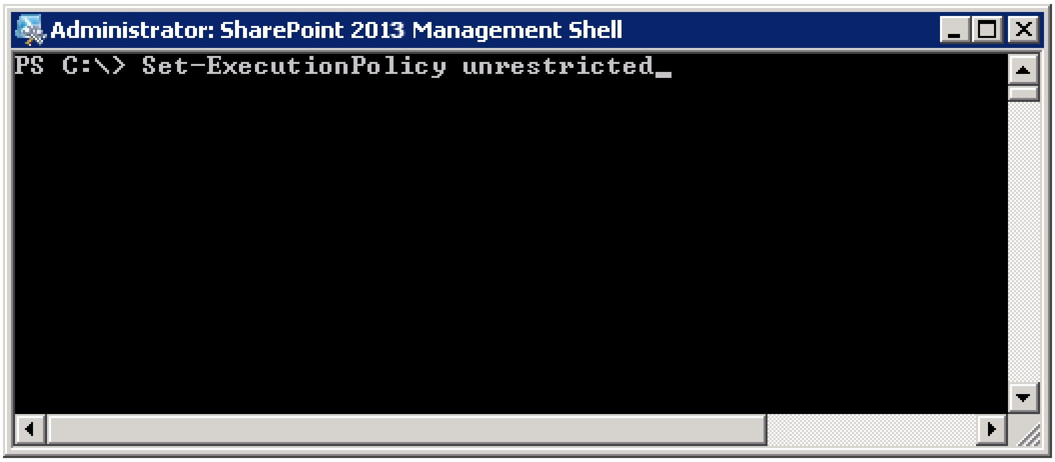
e. In the **Path** field, type: **bdc3://onbase/***
f. For **Crawl Configuration**, select **Include all items in this path**.
g. For **Specify Authentication**, leave the default setting of **Use the default content access account**.

Note: The user account configured for the SharePoint Search Administration **Default content access account** must be configured within OnBase with access to the documents, Document Types, and Document Type Groups that are to be crawled. For more information on your **Default content access account**, contact your SharePoint system administrator. For more information on configuring user account settings, see the OnBase **System Administration** module reference guide.

h. Click **OK** to create the crawl rule.

4. Register the security trimmer:
    a. Open SharePoint 2016 Management Shell. Select **Start | All Programs | Microsoft SharePoint 2016 Products | SharePoint Management Shell**.
    b. Run the following command.

```
Set-ExecutionPolicy unrestricted
```



    c. Press **Y** and **ENTER** when prompted to confirm.
    d. Run the following two commands. If you are copying and pasting commands from this guide, then you may need to remove line breaks from the second command.

```
$searchapp = Get-SPEnterpriseSearchServiceApplication

new-spenterprisesearchsecuritytrimmer -SearchApplication $searchapp -TypeName
"Microsoft.Office.Server.Search.Connector.BDC.SPBDC.SPBdcSecurityTrimmer,
Microsoft.Office.Server.Search.Connector, Version=15.0.0.0, Culture=neutral,
PublicKeyToken=71e9bce111e9429c" -RulePath bdc3://onbase/* -Id 1
```

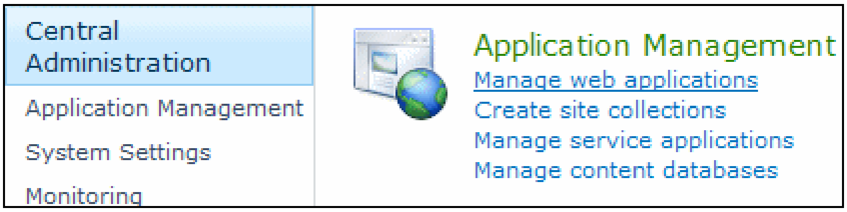
Tip: To limit the number of items that can be returned per search, add the following property to the end of the second command: **-properties CheckLimitProperty~300**. Change the **300** to the maximum number of results for searches. Any queries that return more than the specified quantity will display a message instructing the user to refine the search criteria and perform another search.

5. If you are upgrading an existing installation, delete the OnBase Search Adapter content type from SharePoint.

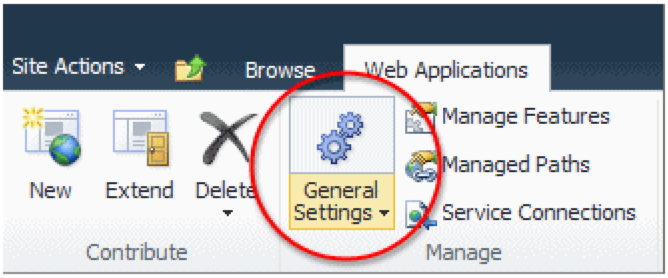
Turning Off Strict File Handling (SharePoint 2016)

To allow the opening of documents in DocPop, the SharePoint application's **Browser File Handling** must be set to **Permissive**.

1. Open SharePoint Central Administration.
2. Click the **Manage web applications** link under **Application Management**.



3. Select the Web application where you installed Integration for Microsoft Search.
4. Click **General Settings** from the ribbon.



5. Under **Browser File Handling**, select **Permissive**.
6. Click **OK**.

Configuring the OnBase Application Server (SharePoint 2016)

After successfully installing Integration for Microsoft Search, the Application Server's web.config file must be updated.

To configure the OnBase Application Server:

1. Locate the web.config file in the virtual directory of the OnBase Application Server. In a default installation, the **web.config** file is located in the **AppServer** virtual directory.

Note: Be sure not to edit the web.config file in your Web Server virtual directory. In a default installation, this is the **AppNet** virtual directory.

2. Open the web.config file in a plain-text editor, such as Notepad. Do not open the web.config file in a binary-text editor, such as Microsoft Word. Binary-text editors can introduce invalid characters to the configuration file that can cause unexpected errors when users attempt to use the Integration for Microsoft Search.

Note: If Windows UAC is enabled, the plain-text editor must be launched with elevated administrator privileges to edit the web.config file. To enable editing, right-click the text editor executable and select **Run as administrator**.

3. Search for the `<Hyland.Applications.Sharepoint.SearchAdapter>` element and configure the values for the following properties:

SharePoint Search Property	Description
DataSource name	The unique name you created to identify the data source connection string configured for the Application Server. For example, **OnBase**.
VirtualRoot	The URL to the virtual directory of your OnBase Web Server, as entered in the Destination Folder dialog box during installation. If OnBase Configuration Management is installed and you want the viewer to include the embedded Workflow panel, leave the **VirtualRoot** property **value** blank. The viewer then uses the URL you specify on the General Settings screen within SharePoint.
StripDomainOnSecurityCheck	Passes the user names to OnBase for the security trimmer. **Note:** For more information on installing the security trimmer, see Installing the Security Trimmer (SharePoint 2016) on page 10. When set to **true**, only the user name is passed. For example, domain\johndoe becomes johndoe.
isDocPop	Specifies which viewer is used to view documents. When set to **true**, the DocPop viewer is used. When set to **false**, the default OnBase viewer is used.

4. If desired, the `<DocumentTypeSplitSize value="5000"/>` property can be added below the SharePoint Search properties within the `<Hyland.Applications.Sharepoint.SearchAdapter>` element. This setting determines how many documents are fetched by search per Document Type. If this setting is not added to the configuration file, the default setting is 5000 documents.

5. If your Application Server does not allow HTTP connections you can configure sections in the web.config file to accommodate this type of Application Server.

   To configure an Application Server that does not allow HTTP connections:

   a. Locate the `<basicHttpBinding>` element and add the following directly below it on a single line:

   ```
   <binding name="SPSearchService_Secure">
   <security mode="Transport">
   <transport clientCredentialType="None"/>
   </security>
   </binding>
   ```

   b. Locate the `<service behaviorConfiguration="SPSearchBehavior" name="SPSearch.SearchService" />` element and replace it with the following:

   ```
   <service name="SPSearch.SearchService"
   behaviorConfiguration="SPSearchBehavior">
   <endpoint address=""
   binding="basicHttpBinding"
   bindingConfiguration="SPSearchService_Secure"
   contract="SPSearch.ISearchService"/>
   </service>
   ```

6. Save and close the web.config file.

Configuring the OnBase Web Server (SharePoint 2016)

Because the OnBase viewer can use DocPop, the DocPop type specified on the **General Settings** page of SharePoint Central Administration must be configured in the OnBase Web Server's **Web.config** file to enable this option. This file resides in the Web Server's virtual directory (which is named **AppNet** in a default installation).

To configure the Web Server's **Web.config** file:

1. Locate the element corresponding to the DocPop type chosen in SharePoint Central Administration:

Document Pop Type	Element
DocPop	**Hyland.Web.DocPop**
PDFPop	**Hyland.Web.PdfPop**
UnityPop	**Hyland.Web.FormPop**
AEPop	**Hyland.Web.FolderPop**

2. Within the element, change the **datasource** value to the name of the ODBC data source configured on the Application Server.

3. Within the same element, change the **embedded** value to **true**.
4. Save the **Web.config** file.

Note: Additional settings are required for UnityPop and AEPop. For more information, see the Unity Client module reference guide.

Depending on your solution's configuration, additional DocPop settings may need to be configured to support Active Directory authentication. For more information about DocPop settings, see the **Web Server** documentation.

For ease of use, configure the OnBase Web Server for Active Directory authentication as described in the Installation chapter of the Web Server module reference guide. This configuration will make it easier to troubleshoot authentication, if necessary.

Installing OnBase Configuration Management (SharePoint 2016)

OnBase Configuration Management installs the viewer with the embedded Workflow panel, which can be used to display OnBase search results. If OnBase Configuration Management is installed and the **VirtualRoot** value in the Application Server's Web.config file is blank, then the embedded Workflow panel is available for documents opened from search results.

Note: If you do not want to use the embedded Workflow panel, you do not have to install OnBase Configuration Management for the Integration for Microsoft Search.

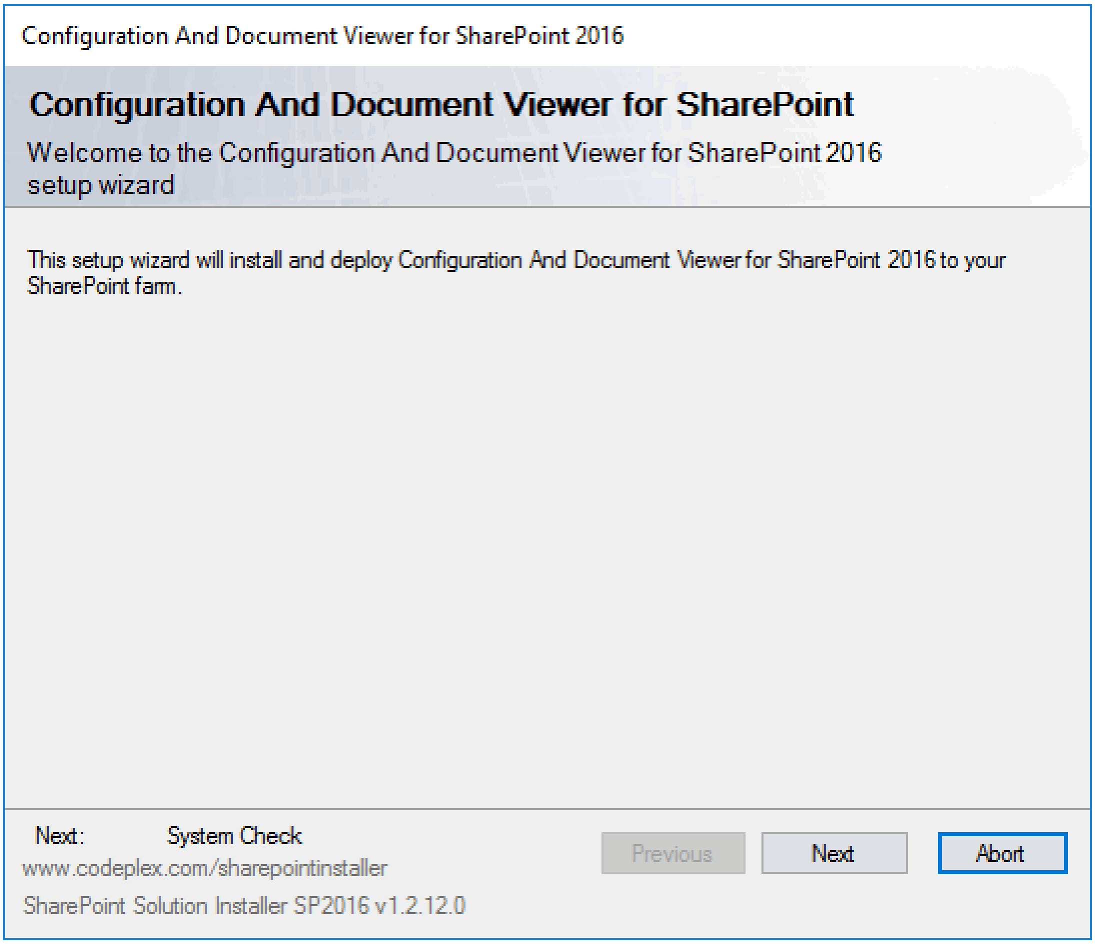
Note: Make sure you are logged on as a SharePoint site collection administrator before running the installer.

To install OnBase Configuration Management:

1. Double-click the Configuration **Setup2016.exe** in the **Configuration** folder of your installation source files.

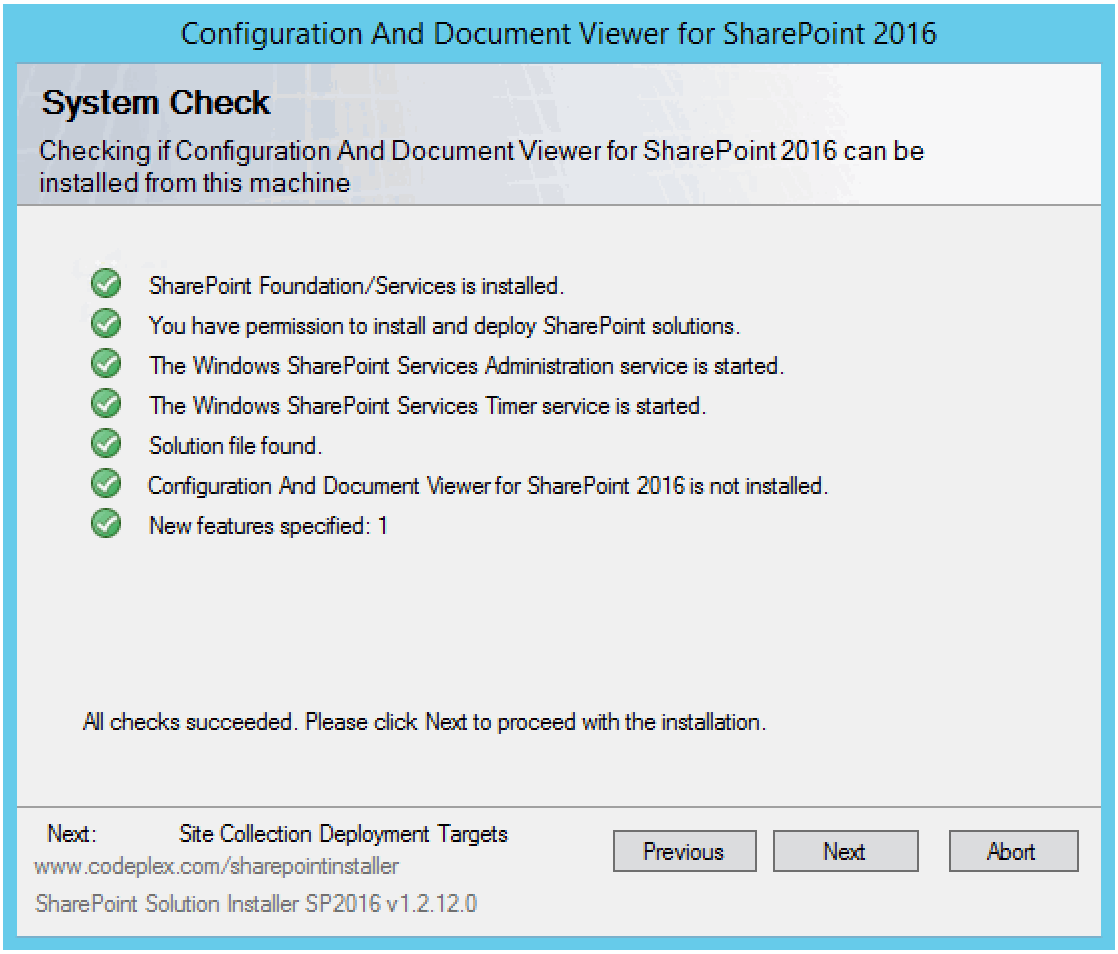
   If you have access to the Core Services build, the **Setup2016.exe** for SharePoint 2016 is located in the following directory: **..\install\SharePoint\SharePoint2016\Configuration**

   The **Configuration And Document Viewer for SharePoint 2016** wizard is displayed.



2. Click **Next**. The **System Check** page is displayed.

3. A system check is performed to determine whether OnBase Configuration Management can be installed on the server.

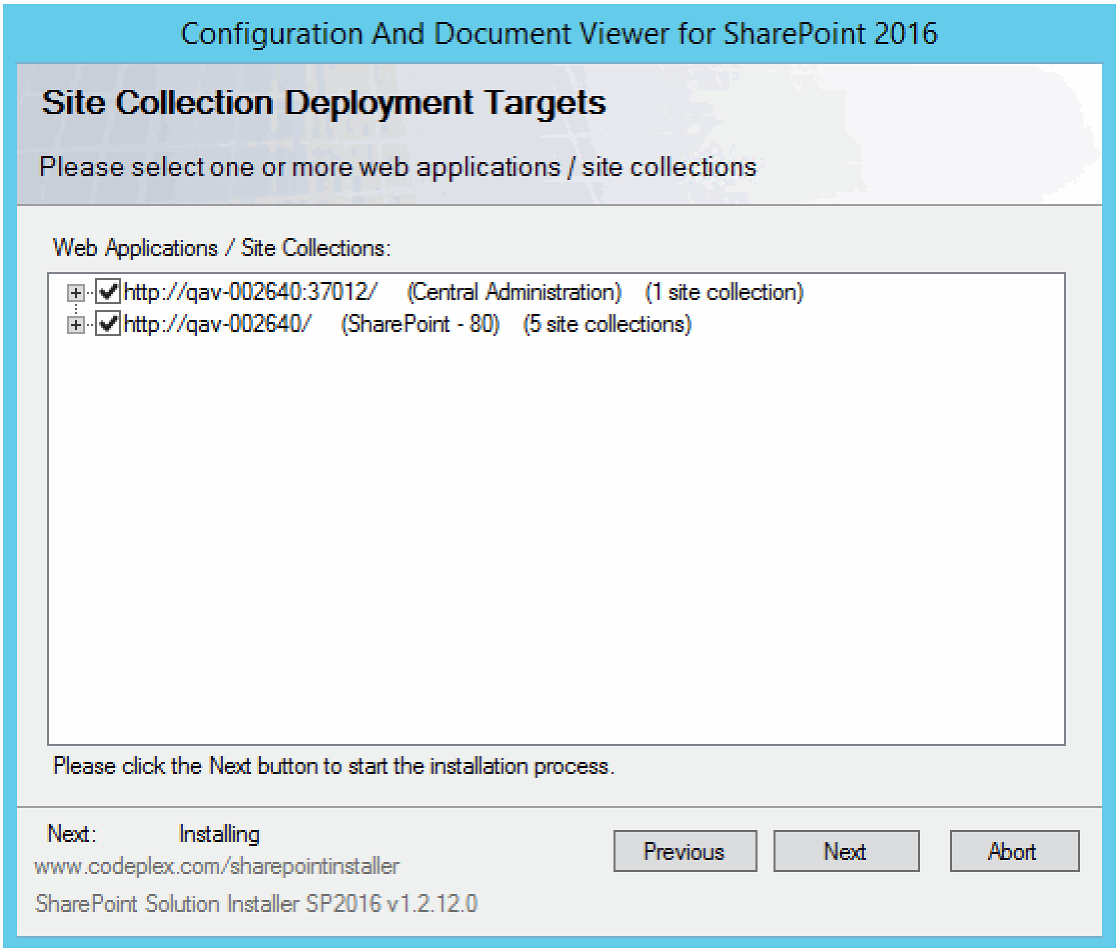


Depending on the results, do one of the following:

- If any of the checks fail, note which checks failed and click **Abort**. Address the failed requirements, and then restart the installation.

Note: On the **System Check** page, the term **solution file** refers to the **OnBaseConfiguration.wsp** file located in the same directory as the **Setup2016.exe** file.

- If the checks pass, click **Next**. The **Site Collection Deployment Targets** page is displayed.



4. Select only the Web applications where you want to deploy the integration. By default, all Web applications are selected.

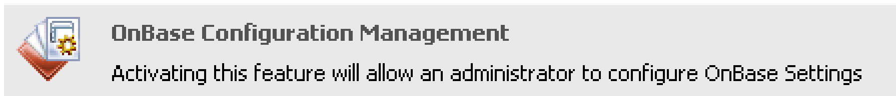
Note: The Central Administration application cannot be deselected because OnBase Configuration Management is administered from this application.

5. Click **Next**. The installer distributes the files required to configure Integration for Microsoft Search. The **Installation Successfully Completed** screen is displayed showing where the integration is deployed for each Web application.
6. Click **Close**.
7. Verify the installation in SharePoint 2016 Central Administration.
   a. On the Central Administration homepage, click the gear button to display its menu.
   b. Select **Site Settings**. The **Site Settings** page is displayed.

c. Under **Site Collection Administration**, click **Site Collection Features**.

Note: To access **Site Collection Features**, you must be logged on as a site collection administrator.

d. Your site collection should now include a feature named **OnBase Configuration Management**, and its status should be **Active**.



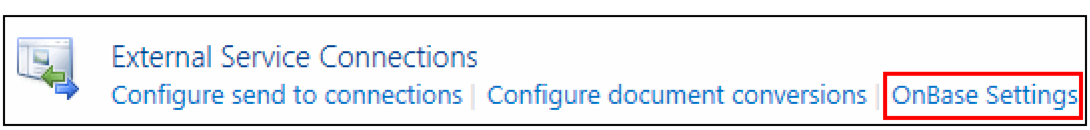
Enabling the Embedded Workflow Panel

The following steps describe how to configure Integration for Microsoft Search to use the embedded Workflow panel in the OnBase document viewer. The options described in this procedure are available only if you have deployed OnBase Configuration Management to your SharePoint site. The **Show Workflow viewer** option takes effect only if you have a blank **VirtualRoot** value in the Hyland.Applications.Sharepoint.SearchAdapter node of the Application Server's Web.config file.

Before configuring Integration for Microsoft Search, first provide the URL to the OnBase Web Server in Central Administration. Then, specify whether to include OnBase Workflow elements in the viewer that displays OnBase documents. Workflow elements include ad-hoc tasks, a work folder displaying related OnBase documents, and a status bar showing the life cycles and queues where the document resides.

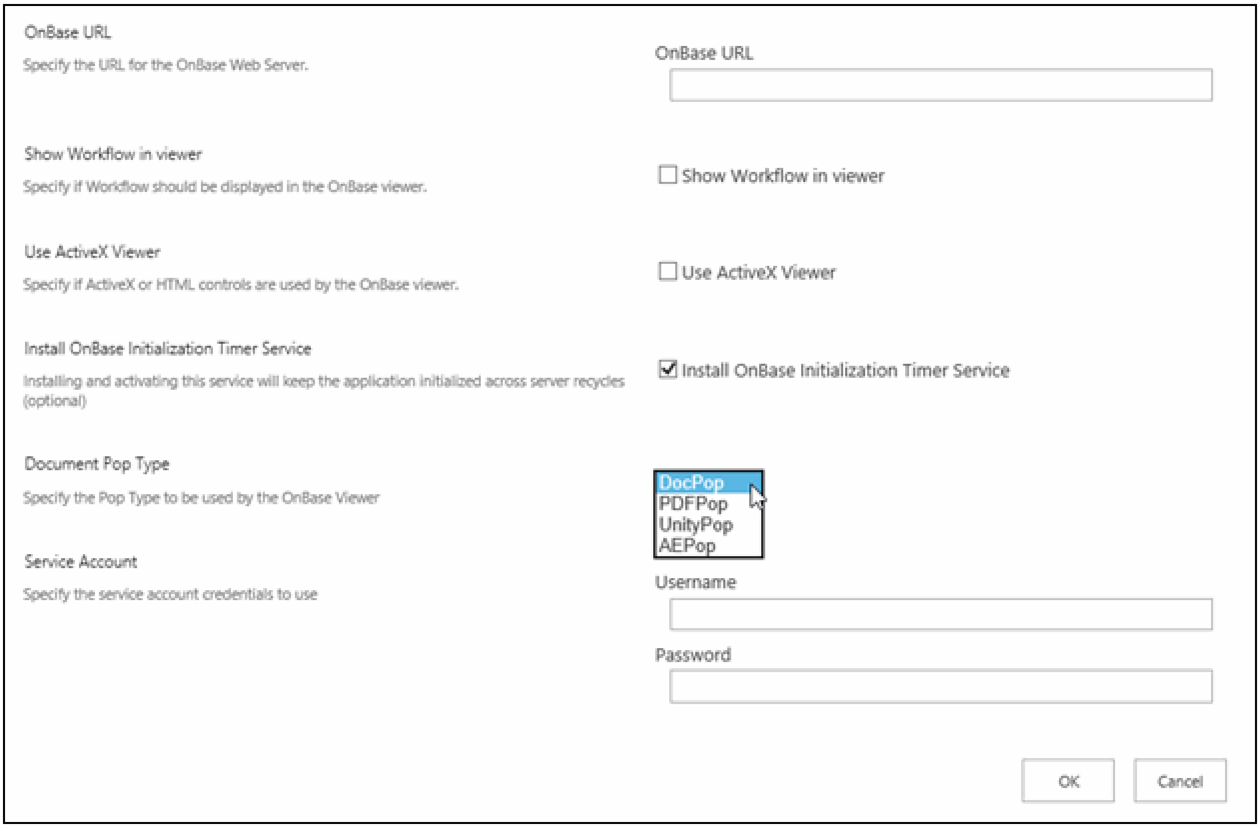
Follow these steps for 2016 versions of SharePoint.

1. Open SharePoint Central Administration.
2. Click **General Application Settings** from the left side of the page.
3. Under **External Service Connections**, click **OnBase Settings**.



The **General Settings** page is displayed.

4. In the **OnBase URL** field, type the URL of the OnBase Web Server. For example: http://webserver03/AppNet



5. Select additional options, if needed:

Option	Description
Show Workflow viewer	Select this option to provide OnBase Workflow functionality in the OnBase viewer. For information about the Workflow viewer, see Workflow Viewer on page 77. **Note:** When this option is selected, the **OnBase URL** specified here must use the same case as the **dmsVirtualRoot** value in the Web Server's Web.config. Otherwise, the viewer displays an error.
Use ActiveX Viewer	Select this option to use the OnBase ActiveX viewer. Clear this option to use the OnBase HTML viewer. Use the HTML viewer in mixed browser environments or if users should not have the OnBase ActiveX controls installed on their workstations. Available features vary per viewer. See the OnBase Web Server module reference guide for differences between the ActiveX Web Client and HTML Web Client.

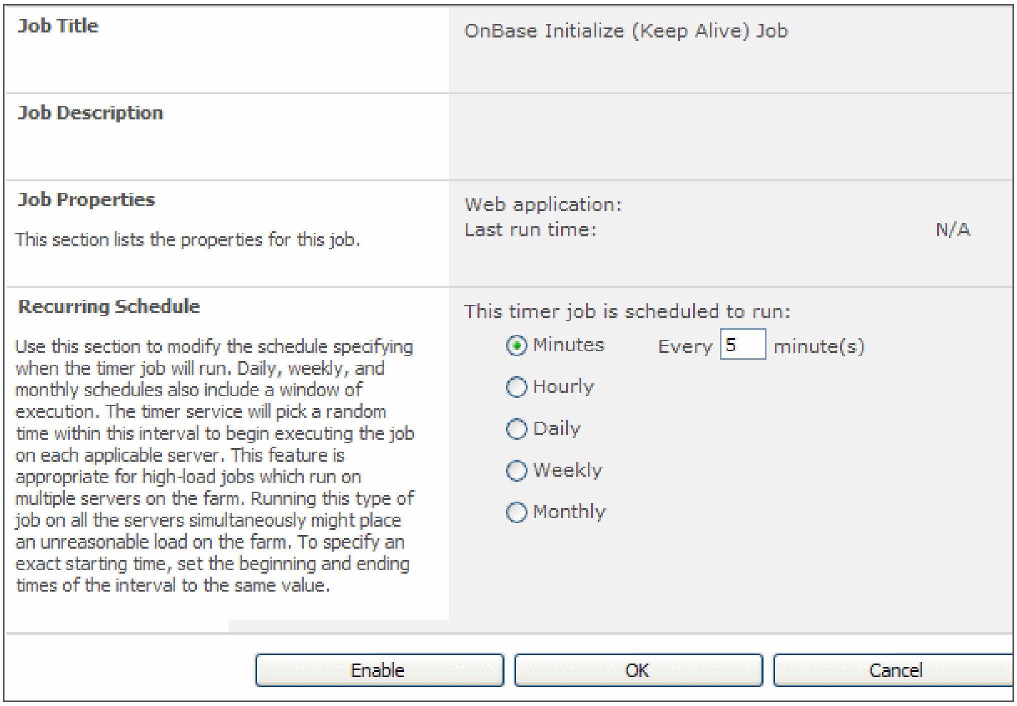
Option	Description
Install OnBase Initialization Timer Service	Select to install the OnBase Initialization Timer service, which checks the Web Server and Application Server every minute to determine whether they are initialized, or prepared to receive requests from the OnBase SharePoint integrations. If the Web Server and Application Server are not initialized (for example, because their application pools were recycled), then the service initializes them so that requests from the OnBase SharePoint integrations will be processed more quickly. If you choose not to use the service, then users may have to wait while the OnBase Web or Application Server initializes before their requests are processed. To uninstall the service, clear this option.
Document Pop Type	Specify the Pop Type to be used to display documents in the OnBase Viewer. Select **DocPop** to view documents in the default viewer. **Note:** See the DocPop documentation for more information. Select **PDFPop** to view documents in the web-based PDF viewer. All documents opened with PDFPop behave as PDFs. **Note:** See the Web Client documentation for more information. Select **UnityPop** to view documents in the Unity Client using UnityPop links. **Note:** See the Unity Client documentation for more information. The Unity Client license is required to use this option. Select **AEPop** to use Application Enabler Pop to view documents. **Note:** See the Application Enabler documentation for more information. The Application Enabler license is required to use this option.
Service Account	Specify the service account credentials to use. In the **Username** field, type the service account user name. In the **Password** field, type the service account password. **Note:** The service account credentials are required.

6. Click **OK**. If you selected **Install OnBase Initialization Timer Service**, continue to the following procedure, Enabling the Initialization Timer Service on page 24.

Enabling the Initialization Timer Service

If you selected **Install OnBase Initialization Timer Service** under General Settings, then you must enable the service in Timer Job Definitions.

1. From Central Administration, click **Monitoring** from the left side of the page.
2. Under **Timer Jobs**, click **Review job definitions**.
3. Click the **OnBase Initialize (Keep Alive) Job** link from the list. The **Edit Timer Job** page is displayed.



4. Click **Enable**.
5. Click **OK**.

Applying Browser Settings for the Viewer

To use the OnBase viewer, Integration for Microsoft Search requires the following security settings to be set to **Enable** for the Web Server's security zone in Internet Explorer:

- **Access data sources across domains**
- **Navigate sub-frames across different domains**

To change settings for the Web Server's security zone, select the zone from the **Security** tab and click **Custom Level**. The settings are in the **Miscellaneous** category.

Installation for SharePoint 2019

This section describes how to install the search integration for Microsoft SharePoint Server 2019 and Microsoft Search Server 2019. To install the Integration for Microsoft Search, complete the following tasks:

- Importing the BDCM File (SharePoint 2019) on page 25
- Creating the Content Source (SharePoint 2019) on page 27
- Installing the Security Trimmer (SharePoint 2019) on page 29
- Turning Off Strict File Handling (SharePoint 2019) on page 32
- Configuring the OnBase Application Server (SharePoint 2019) on page 32
- Configuring the OnBase Web Server (SharePoint 2019) on page 34
- Installing OnBase Configuration Management (SharePoint 2019) on page 35

Importing the BDCM File (SharePoint 2019)

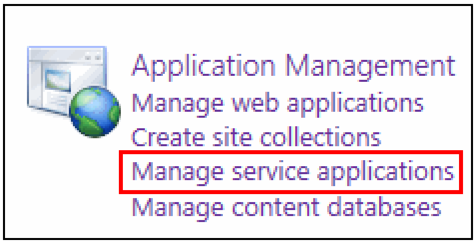
The **model.bdcm** file and the SharePoint **Business Data Connectivity Service** are used to install Integration for Microsoft Search for SharePoint 2019.

1. Double-click **model.bdcm**. This file is typically located in the **\x64\SharePoint\SharePoint 2019\Search** folder of your source installation files.
2. Find the Property Names **WcfMexDocumentUrl** and **WcfEndpointAddress**. Edit the Property Names to include your AppServer path.

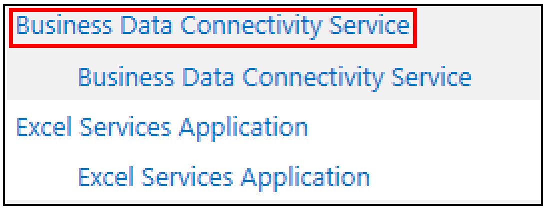
   The Property Names should look as follows:

   <Property Name="WcfMexDocumentUrl" Type="System.String">http://[AppServerPath]/SearchService.svc?singleWsdl</Property>

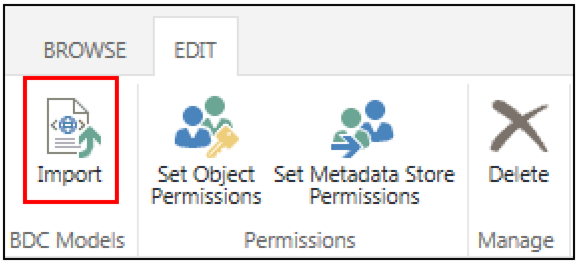
   <Property Name="WcfEndpointAddress" Type="System.String">http://[AppServerPath]/SearchService.svc</Property>
3. Save and close the **model.bdcm** file.
4. In SharePoint **Central Administration**, click **Manage Service Applications**.



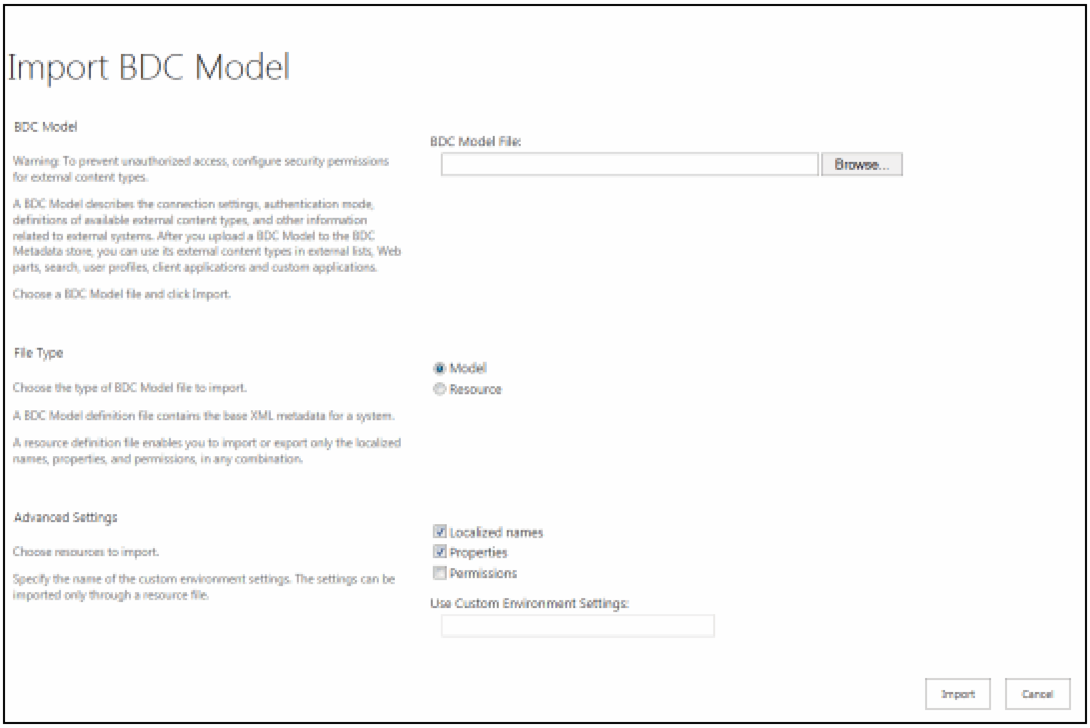
5. Click the first entry for Business **Data Connectivity Service**.



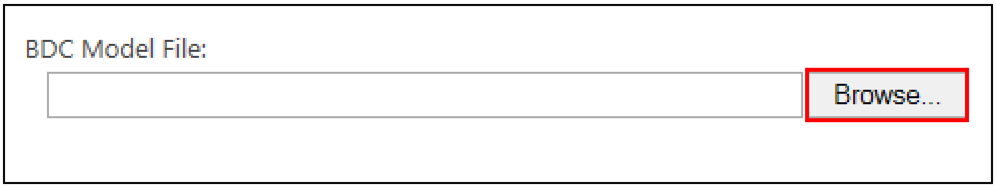
6. In the ribbon menu, click **Import**.



7. The **Import BDC Model** page is displayed.



8. Browse to find the **model.bdcm** file

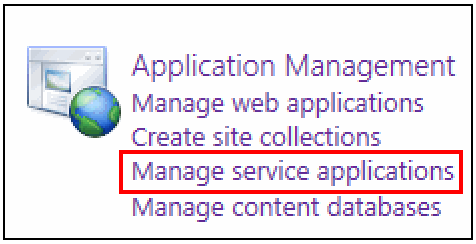


9. Click **Import**.

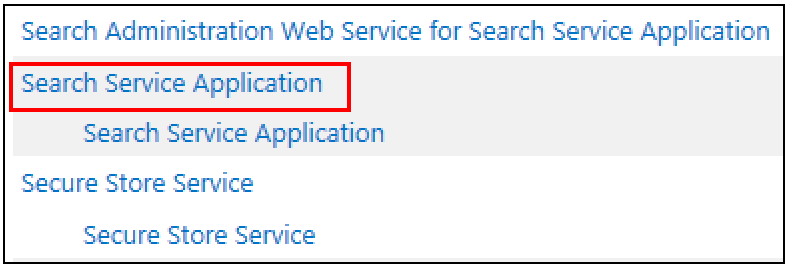
Creating the Content Source (SharePoint 2019)

The Content Source can be created from within Central Administration.

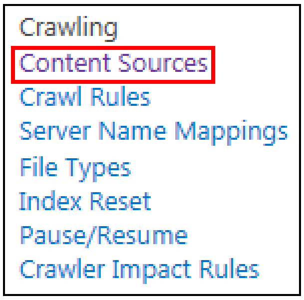
1. In Central Administration, click **Manage Service Applications**.



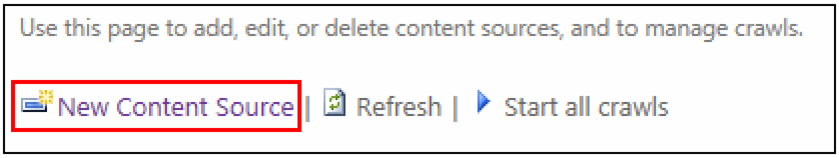
2. Click the first entry for **Search Service Application**.



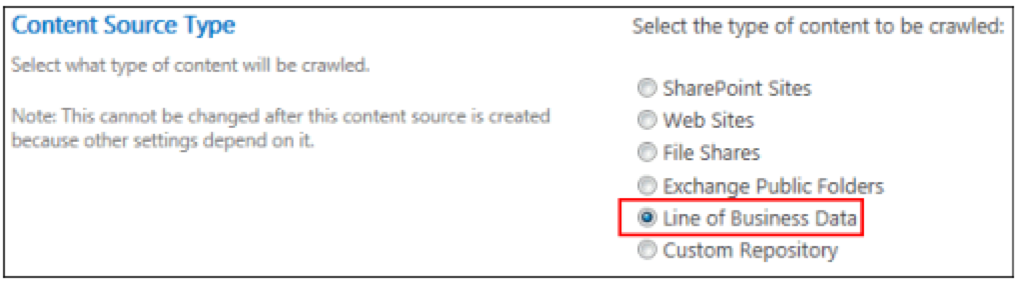
3. The **Search Service Application: Search Administration** screen is displayed. Under **Crawling**, click **Content Sources.**



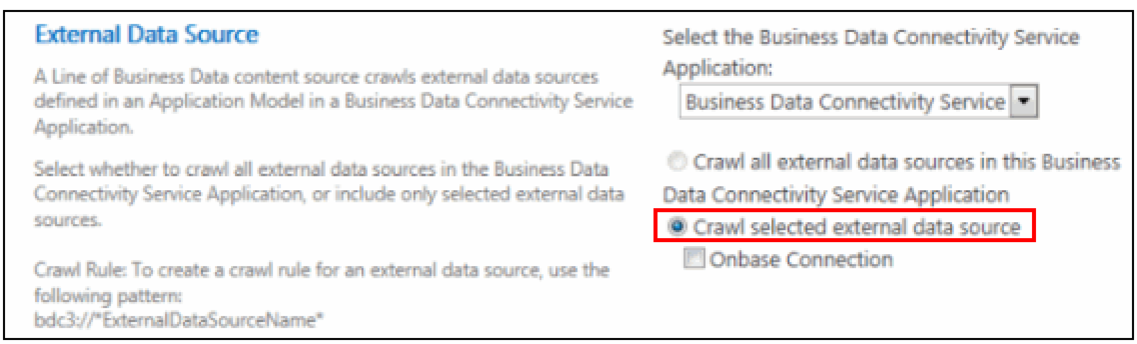
4. The **Search Service Application: Manage Content Sources** screen is displayed. Click **New Content Source**.



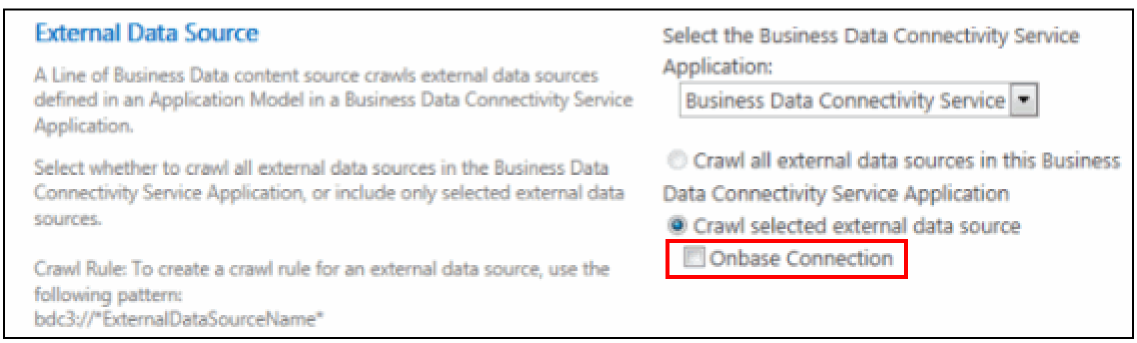
5. The **Search Service Application: Add Content Source** screen is displayed. Enter a **Name** for the Content Source.
6. Under **Content Source Type**, select **Line of Business Data**.



7. Under **External Data Source**, ensure **Crawl selected external data source** is selected.



8. Select **Onbase Connection** as the **External Data Source**.



9. Click **OK**.

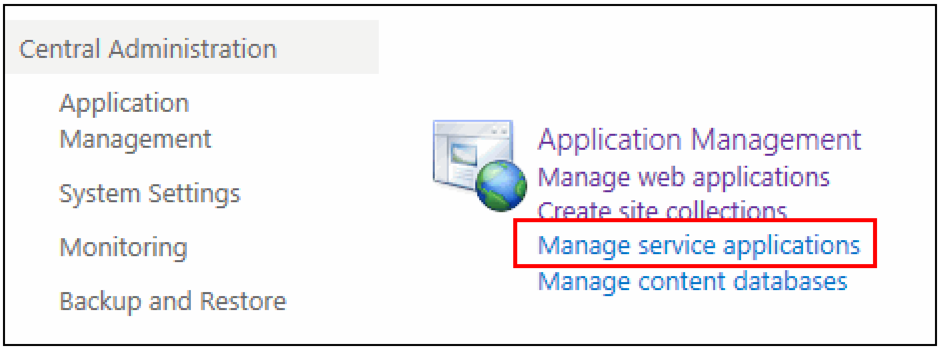
Installing the Security Trimmer (SharePoint 2019)

The Search Adapter security trimmer is an optional measure provided for increased security. It restricts SharePoint search results containing OnBase documents to show only those the logged in user has rights to view. It also removes deleted documents from search results immediately. These features help prevent users from seeing sensitive information contained in the Auto-Names of the returned results.

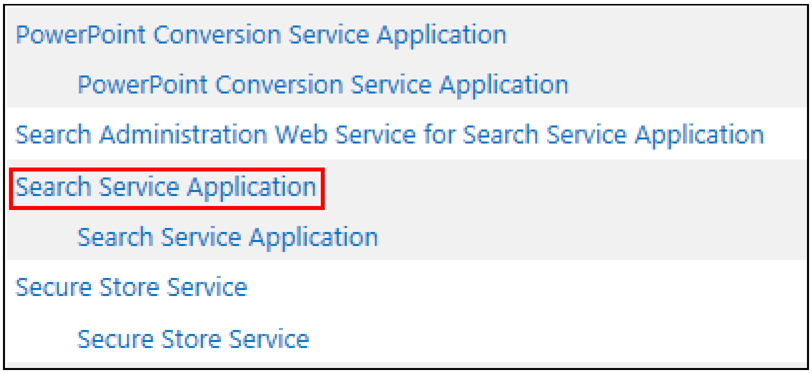
Note: This feature applies only to solutions configured for Active Directory authentication.

Please refer to the following article for more information: http://msdn2.microsoft.com/en-us/library/aa981473.aspx

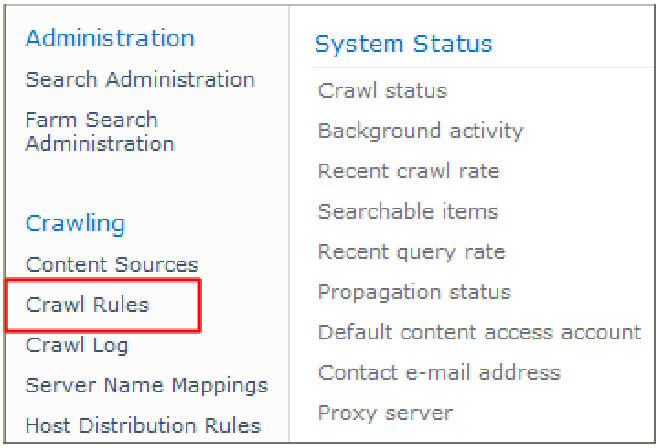
1. Install the Integration for Microsoft Search as described under Importing the BDCM File (SharePoint 2016) on page 7.
2. Create a crawl rule in SharePoint:
   a. Open Central Administration.
3. Under **Application Management**, click **Manage service applications**.



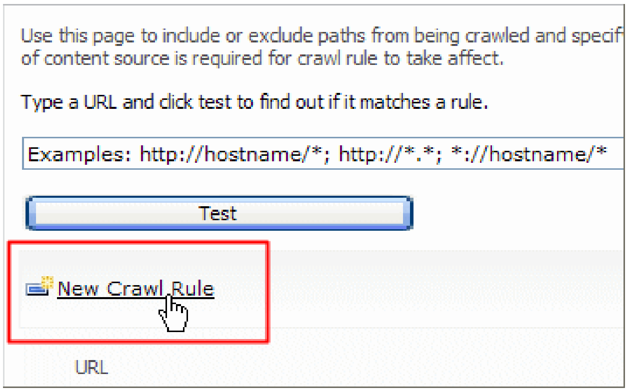
   b. Click **Search Service Application**.



c. Click **Crawl Rules** from the left side of the page.



d. Click **New Crawl Rule**.



e. In the **Path** field, type: **bdc3://onbase/***

f. For **Crawl Configuration**, select **Include all items in this path**.

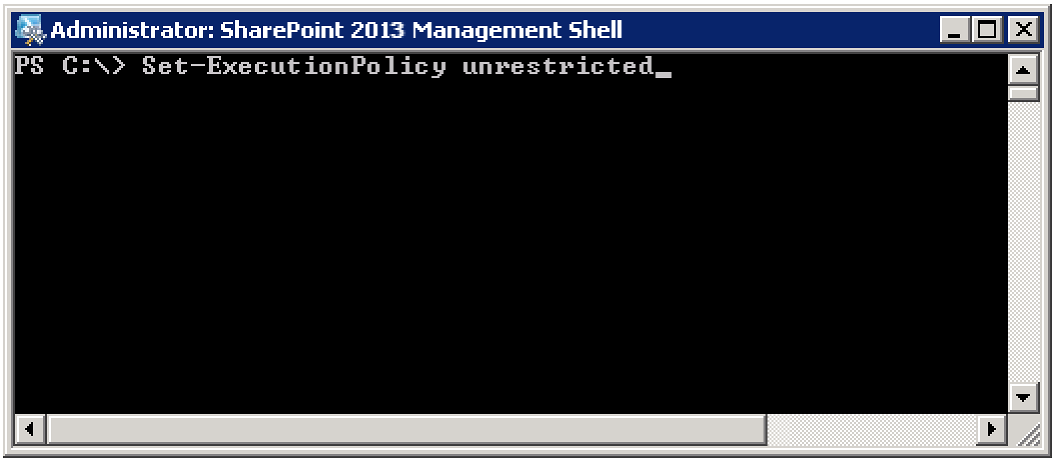
g. For **Specify Authentication**, leave the default setting of **Use the default content access account**.

Note: The user account configured for the SharePoint Search Administration **Default content access account** must be configured within OnBase with access to the documents, Document Types, and Document Type Groups that are to be crawled. For more information on your **Default content access account**, contact your SharePoint system administrator. For more information on configuring user account settings, see the OnBase **System Administration** module reference guide.

h. Click **OK** to create the crawl rule.

4. Register the security trimmer:
   a. Open SharePoint 2019 Management Shell. Select **Start | All Programs | Microsoft SharePoint 2019 Products | SharePoint Management Shell**.
   b. Run the following command.

```
Set-ExecutionPolicy unrestricted
```



   c. Press **Y** and **ENTER** when prompted to confirm.
   d. Run the following two commands. If you are copying and pasting commands from this guide, then you may need to remove line breaks from the second command.

```
$searchapp = Get-SPEnterpriseSearchServiceApplication

new-spenterprisesearchsecuritytrimmer -SearchApplication $searchapp -TypeName
"Microsoft.Office.Server.Search.Connector.BDC.SPBDC.SPBdcSecurityTrimmer,
Microsoft.Office.Server.Search.Connector, Version=15.0.0.0, Culture=neutral,
PublicKeyToken=71e9bce111e9429c" -RulePath bdc3://onbase/* -Id 1
```

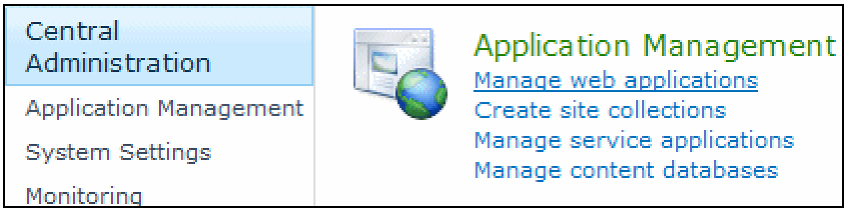
Tip: To limit the number of items that can be returned per search, add the following property to the end of the second command: **-properties CheckLimitProperty~300**. Change the **300** to the maximum number of results for searches. Any queries that return more than the specified quantity will display a message instructing the user to refine the search criteria and perform another search.

5. If you are upgrading an existing installation, delete the OnBase Search Adapter content type from SharePoint.

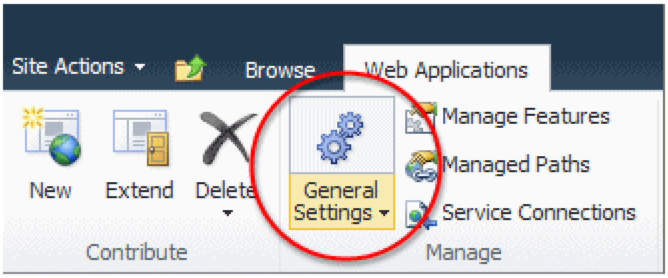
Turning Off Strict File Handling (SharePoint 2019)

To allow the opening of documents in DocPop, the SharePoint application's **Browser File Handling** must be set to **Permissive**.

1. Open SharePoint Central Administration.
2. Click the **Manage web applications** link under **Application Management**.



3. Select the Web application where you installed Integration for Microsoft Search.
4. Click **General Settings** from the ribbon.



5. Under **Browser File Handling**, select **Permissive**.
6. Click **OK**.

Configuring the OnBase Application Server (SharePoint 2019)

After successfully installing Integration for Microsoft Search, the Application Server's web.config file must be updated.

To configure the OnBase Application Server:

1. Locate the web.config file in the virtual directory of the OnBase Application Server. In a default installation, the **web.config** file is located in the **AppServer** virtual directory.

Note: Be sure not to edit the web.config file in your Web Server virtual directory. In a default installation, this is the **AppNet** virtual directory.

2. Open the web.config file in a plain-text editor, such as Notepad. Do not open the web.config file in a binary-text editor, such as Microsoft Word. Binary-text editors can introduce invalid characters to the configuration file that can cause unexpected errors when users attempt to use the Integration for Microsoft Search.

Note: If Windows UAC is enabled, the plain-text editor must be launched with elevated administrator privileges to edit the web.config file. To enable editing, right-click the text editor executable and select **Run as administrator**.

3. Search for the `<Hyland.Applications.Sharepoint.SearchAdapter>` element and configure the values for the following properties:

SharePoint Search Property	Description
DataSource name	The unique name you created to identify the data source connection string configured for the Application Server. For example, **OnBase**.
VirtualRoot	The URL to the virtual directory of your OnBase Web Server, as entered in the **Destination Folder** dialog box during installation. If OnBase Configuration Management is installed and you want the viewer to include the embedded Workflow panel, leave the **VirtualRoot** property **value** blank. The viewer then uses the URL you specify on the General Settings page within SharePoint.
StripDomainOnSecurityCheck	Passes the user names to OnBase for the security trimmer. **Note:** For more information on installing the security trimmer, see Installing the Security Trimmer (SharePoint 2019) on page 29. When set to **true**, only the user name is passed. For example, **domain\johndoe** becomes **johndoe**.
isDocPop	Specifies which viewer is used to view documents. When set to **true**, the DocPop viewer is used. When set to **false**, the default OnBase viewer is used.

4. If desired, the `<DocumentTypeSplitSize value="5000"/>` property can be added below the SharePoint Search properties within the `<Hyland.Applications.Sharepoint.SearchAdapter>` element. This setting determines how many documents per Document Type are returned by search. If this setting is not added to the configuration file, the default setting is 5000 documents.

5. If your Application Server does not allow HTTP connections, you can configure sections in the web.config file to accommodate this type of Application Server.

   To configure an Application Server that does not allow HTTP connections:

   a. Locate the `<basicHttpBinding>` element and add the following directly below it:

   ```
   <binding name="SPSearchService_Secure">
   <security mode="Transport">
   <transport clientCredentialType="None"/>
   </security>
   </binding>
   ```

   b. Locate the `<service behaviorConfiguration="SPSearchBehavior" name="SPSearch.SearchService" />` element and replace it with the following:

   ```
   <service name="SPSearch.SearchService"
   behaviorConfiguration="SPSearchBehavior">
   <endpoint address=""
   binding="basicHttpBinding"
   bindingConfiguration="SPSearchService_Secure"
   contract="SPSearch.ISearchService"/>
   </service>
   ```

6. Save and close the web.config file.

Configuring the OnBase Web Server (SharePoint 2019)

Because the OnBase viewer can use DocPop, the DocPop type specified on the **General Settings** page of SharePoint Central Administration must be configured in the OnBase Web Server's **Web.config** file to enable this option. This file resides in the Web Server's virtual directory (which is named **AppNet** in a default installation).

To configure the Web Server's **Web.config** file:

1. Locate the element corresponding to the DocPop type chosen in SharePoint Central Administration:

Document Pop Type	Element
DocPop	**Hyland.Web.DocPop**
PDFPop	**Hyland.Web.PdfPop**
UnityPop	**Hyland.Web.FormPop**
AEPop	**Hyland.Web.FolderPop**

2. Within the element, change the **datasource** value to the name of the ODBC data source configured on the Application Server.

3. Within the same element, change the **embedded** value to **true**.
4. Save the **Web.config** file.

Note: Additional settings are required for UnityPop and AEPop. For more information, see the Unity Client module reference guide.

Depending on your solution's configuration, additional DocPop settings may need to be configured to support Active Directory authentication. For more information about DocPop settings, see the **Web Server** documentation.

For ease of use, configure the OnBase Web Server for Active Directory authentication as described in the Installation chapter of the Web Server module reference guide. This configuration will make it easier to troubleshoot authentication, if necessary.

Installing OnBase Configuration Management (SharePoint 2019)

OnBase Configuration Management installs the viewer with the embedded Workflow panel, which can be used to display OnBase search results.

Note: If you do not want to use the embedded Workflow panel, you do not have to install OnBase Configuration Management for the Integration for Microsoft Search.

If OnBase Configuration Management is installed and the **VirtualRoot** value in the Application Server's Web.config file is blank, then the embedded Workflow panel is available for documents opened from search results.

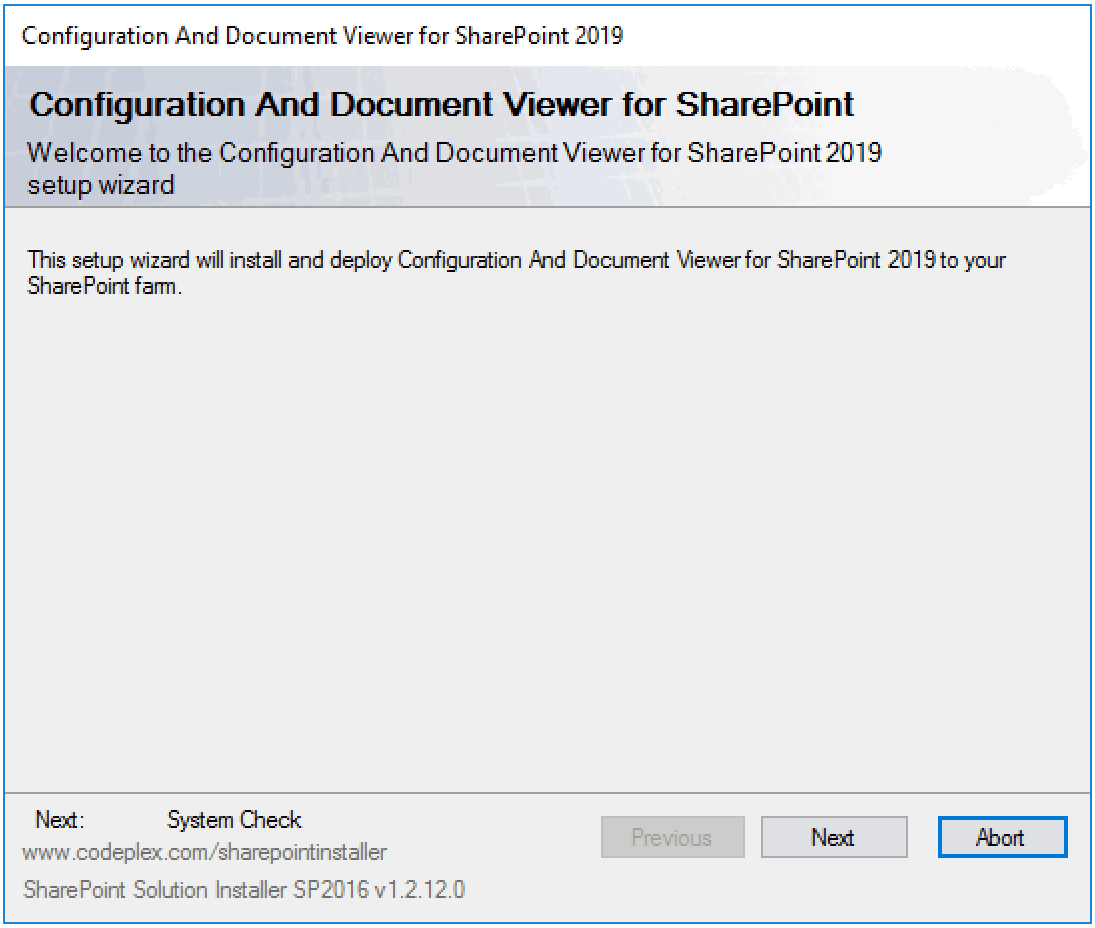
Note: Make sure you are logged on as a SharePoint site collection administrator before running the installer.

To install OnBase Configuration Management:

1. Double-click the Configuration **Setup2019.exe** in the **Configuration** folder of your installation source files.

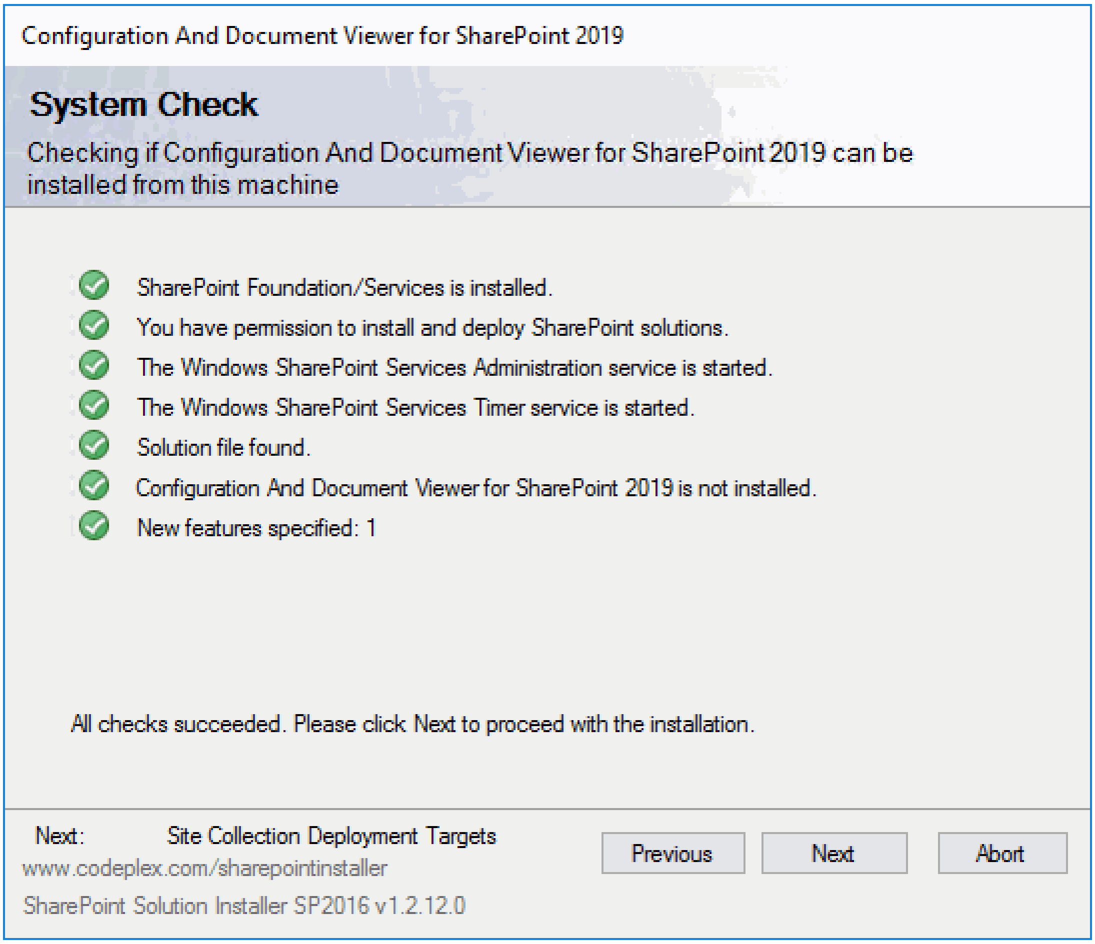
   If you have access to the Core Services build, the **Setup2019.exe** for SharePoint 2019 is located in the following directory: **..\install\SharePoint\SharePoint2019\Configuration**

   The **Configuration And Document Viewer for SharePoint 2019** wizard is displayed.



2. Click **Next**. The **System Check** page is displayed.

3. A system check is performed to determine whether OnBase Configuration Management can be installed on the server.

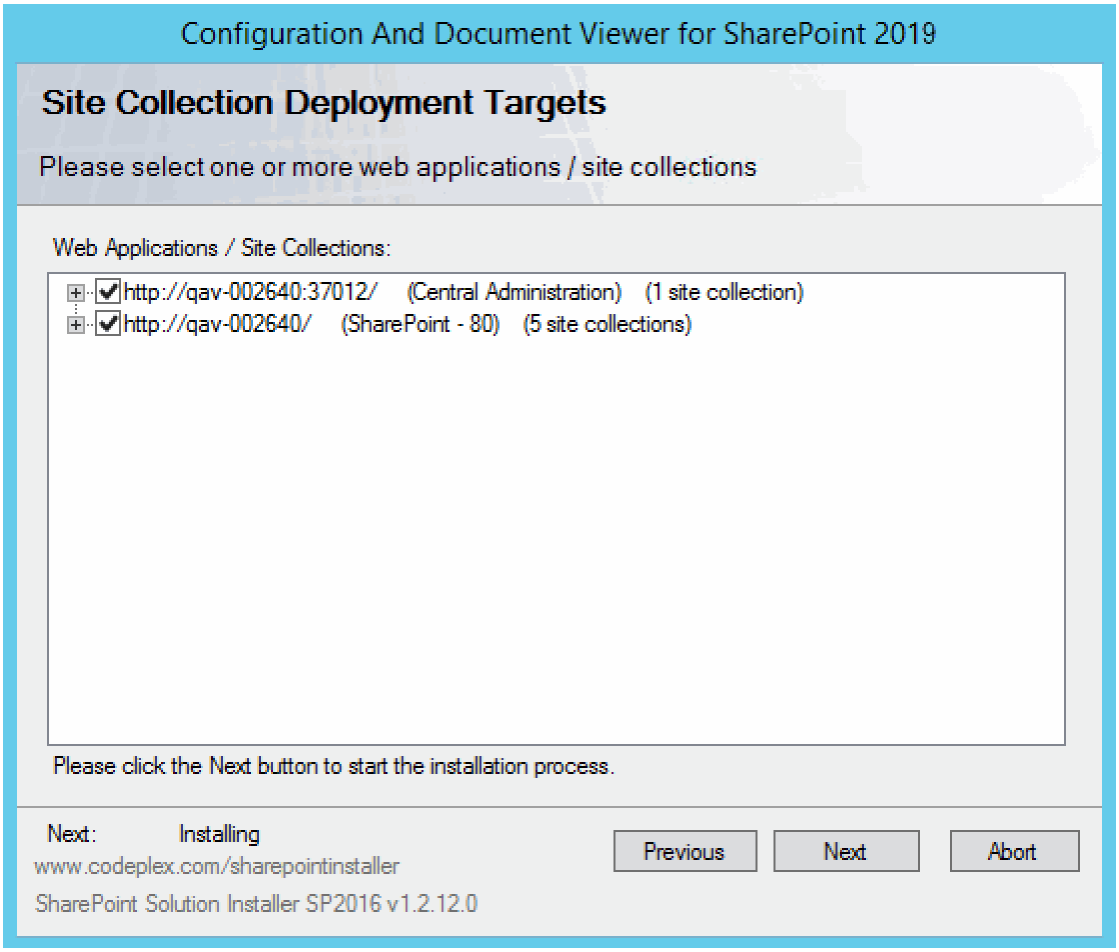


Depending on the results, do one of the following:

- If any of the checks fail, note which checks failed and click **Abort**. Address the failed requirements, and then restart the installation.

Note: On the **System Check** page, the term **solution file** refers to the **OnBaseConfiguration.wsp** file located in the same directory as the **Setup2019.exe** file.

- If the checks pass, click **Next**. The **Site Collection Deployment Targets** page is displayed.



4. Select only the Web applications where you want to deploy the integration. By default, all Web applications are selected.

Note: The Central Administration application cannot be deselected because OnBase Configuration Management is administered from this application.

5. Click **Next**. The installer distributes the files required to configure Integration for Microsoft Search. The **Installation Successfully Completed** screen is displayed showing where the integration is deployed for each Web application.
6. Click **Close**.
7. Verify the installation in SharePoint 2019 Central Administration.
   a. On the Central Administration homepage, click the gear button to display its menu.
   b. Select **Site Settings**. The **Site Settings** page is displayed.

c. Under **Site Collection Administration**, click **Site Collection Features**.

Note: To access **Site Collection Features**, you must be logged on as a site collection administrator.

d. Your site collection should now include a feature named **OnBase Configuration Management**, and its status should be **Active**.

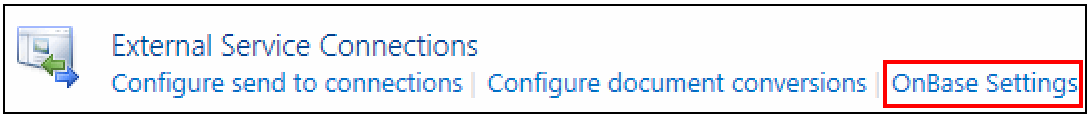
Enabling the Embedded Workflow Panel

The following steps describe how to configure Integration for Microsoft Search to use the embedded Workflow panel in the OnBase document viewer. The options described in this procedure are available only if you have deployed OnBase Configuration Management to your SharePoint site. The **Show Workflow viewer** option takes effect only if you have a blank **VirtualRoot** value in the Hyland.Applications.Sharepoint.SearchAdapter node of the Application Server's Web.config file.

Before configuring Integration for Microsoft Search, first provide the URL to the OnBase Web Server in Central Administration. Then, specify whether to include OnBase Workflow elements in the viewer that displays OnBase documents. Workflow elements include ad-hoc tasks, a work folder displaying related OnBase documents, and a status bar showing the life cycles and queues where the document resides.

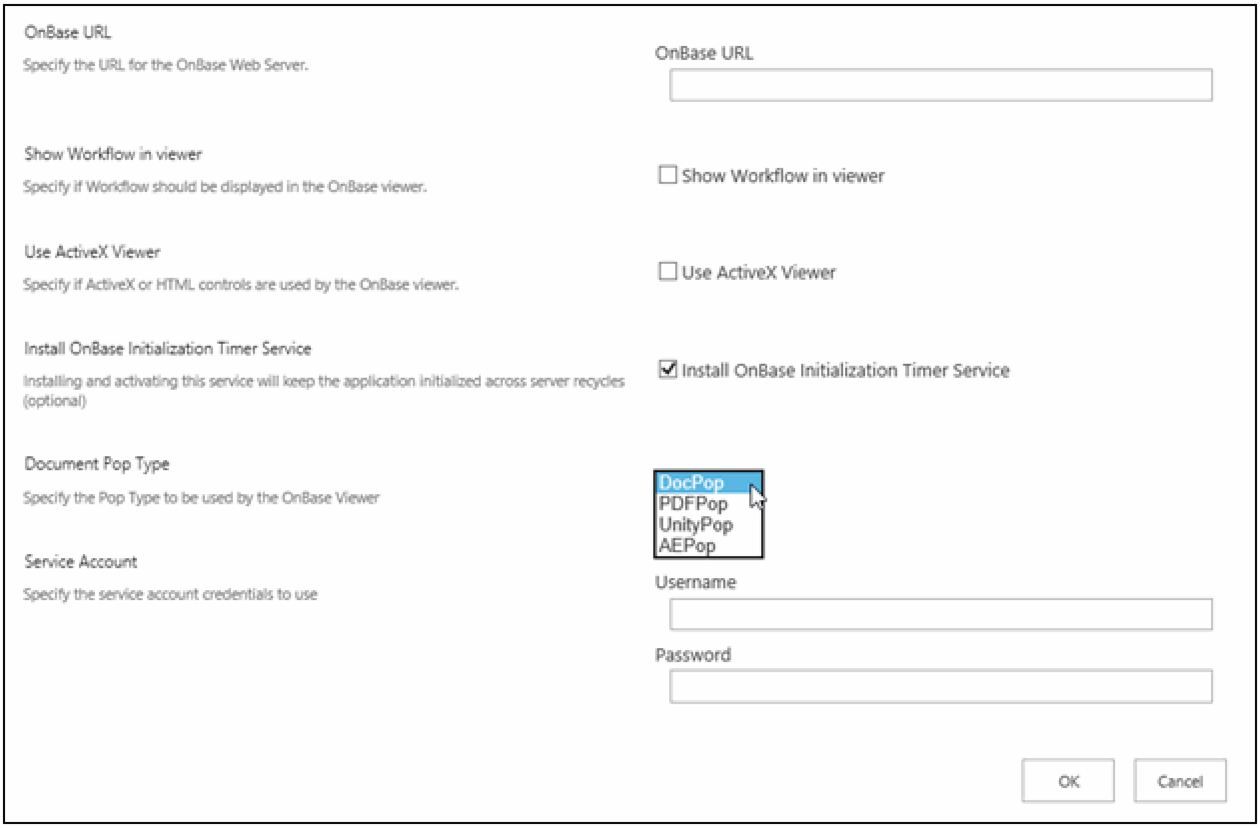
To configure general settings:

1. Open SharePoint Central Administration.
2. Click **General Application Settings** from the left side of the page.
3. Under **External Service Connections**, click **OnBase Settings**.



The **General Settings** page is displayed.

4. In the **OnBase URL** field, type the URL of the OnBase Web Server. For example: http://webserver03/AppNet



5. Select additional options, if needed:

Option	Description
Show Workflow viewer	Select this option to provide OnBase Workflow functionality in the OnBase viewer. For information about the Workflow viewer, see Workflow Viewer on page 77. **Note:** When this option is selected, the **OnBase URL** specified here must use the same case as the **dmsVirtualRoot** value in the Web Server's Web.config. Otherwise, the viewer displays an error.
Use ActiveX Viewer	Select this option to use the OnBase ActiveX viewer. Clear this option to use the OnBase HTML viewer. Use the HTML viewer in mixed browser environments or if users should not have the OnBase ActiveX controls installed on their workstations. Available features vary per viewer. See the OnBase Web Server module reference guide for differences between the ActiveX Web Client and HTML Web Client.

Option	Description
Install OnBase Initialization Timer Service	Select to install the OnBase Initialization Timer service, which checks the Web Server and Application Server every minute to determine whether they are initialized, or prepared to receive requests from the OnBase SharePoint integrations. If the Web Server and Application Server are not initialized (for example, because their application pools were recycled), then the service initializes them so that requests from the OnBase SharePoint integrations will be processed more quickly. If you choose not to use the service, then users may have to wait while the OnBase Web or Application Server initializes before their requests are processed. To uninstall the service, clear this option.
Document Pop Type	Specify the Pop Type to be used to display documents in the OnBase Viewer. Select **DocPop** to view documents in the default viewer. **Note:** See the DocPop documentation for more information. Select **PDFPop** to view documents in the web-based PDF viewer. All documents opened with PDFPop behave as PDFs. **Note:** See the Web Client documentation for more information. Select **UnityPop** to view documents in the Unity Client using UnityPop links. **Note:** See the Unity Client documentation for more information. The Unity Client license is required to use this option. Select **AEPop** to use Application Enabler Pop to view documents. **Note:** See the Application Enabler documentation for more information. The Application Enabler license is required to use this option.
Service Account	Specify the service account credentials to use. In the **Username** field, type the service account user name. In the **Password** field, type the service account password. **Note:** The service account credentials are required.

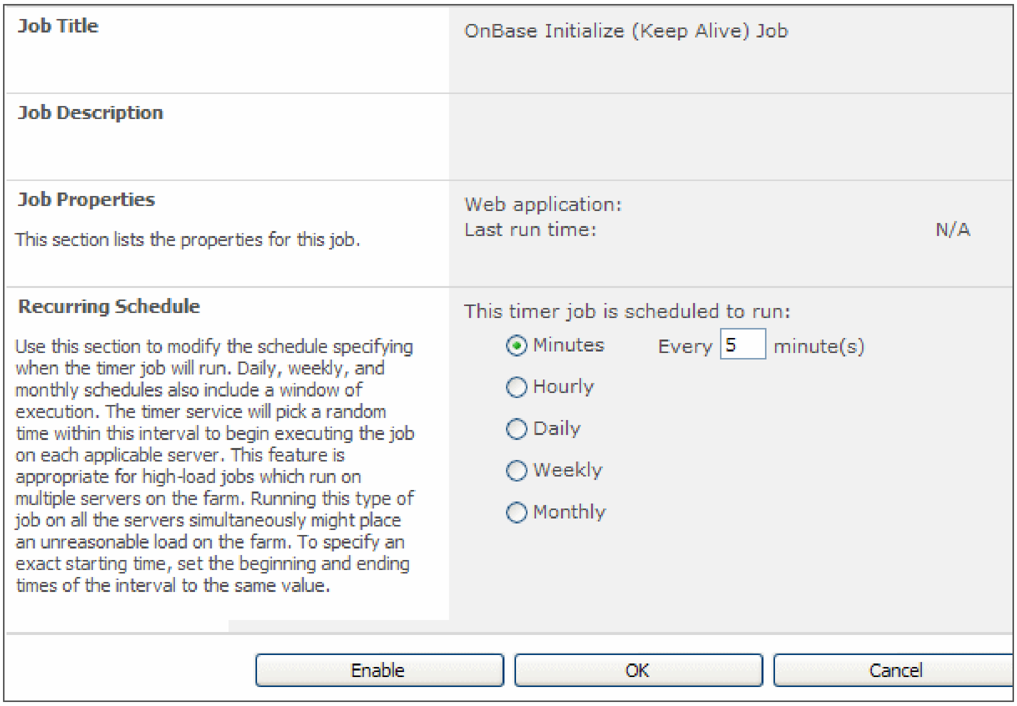
6. Click **OK**. If you selected **Install OnBase Initialization Timer Service**, continue to the following section on enabling the initialization timer service.

Enabling the Initialization Timer Service

If you selected **Install OnBase Initialization Timer Service** under General Settings, then you must enable the service in Timer Job Definitions.

To enable the initialization timer service:

1. From Central Administration, click **Monitoring** from the left side of the page.
2. Under **Timer Jobs**, click **Review job definitions**.
3. Click the **OnBase Initialize (Keep Alive) Job** link from the list. The **Edit Timer Job** page is displayed.



4. Click **Enable**.
5. Click **OK**.

Applying Browser Settings for the Viewer

To use the OnBase viewer, Integration for Microsoft Search requires the following security settings to be set to **Enable** for the Web Server's security zone in Internet Explorer:

- **Access data sources across domains**
- **Navigate sub-frames across different domains**

To change settings for the Web Server's security zone, select the zone from the **Security** tab and click **Custom Level**. The settings are in the **Miscellaneous** category.

Repair or Remove an Installation

After installing the solution, you can use the installer to repair or remove a previous installation.

1. Launch the **setup.exe** or ***.msi** installation package.
2. Click **Next** at the **System Check** dialog. The **Repair or Remove** dialog box is displayed.
3. Select the option for the actions you wish to perform:

Option	Description
Repair	Retracts the solution from all Web applications and deploys it again.
Remove	Retracts the solution from all Web applications and deletes it from the SharePoint solution store.

4. Click **Next** to repair or remove the installation.

Command Line Switches

No command line switches apply to Integration for Microsoft Search.

INI Options

No options in the onbase32.ini file apply to Integration for Microsoft Search.

Backup/Recovery

Backup

Configuration

Content Source configurations are stored in the OnBase database. A proper database backup will contain all configuration information relating to Content Sources.

Registry Settings

No registry settings apply to the Integration for Microsoft Search module.

External Files

No external files are associated directly with the Integration for Microsoft Search module.

Recovery

An error will occur when Microsoft SharePoint attempts to access a Content Source that has been removed from Microsoft SharePoint. The Content Source can be added back into Microsoft SharePoint using the **Recover** button displayed on the OnBase Search Adapter Web Part.

Troubleshooting

The OnBase integrations for SharePoint display documents using DocPop, a component of the OnBase Web Server. When issues are encountered with OnBase documents in SharePoint, the cause may be related to Web Server configuration. Consult the Web Server module reference guide for comprehensive troubleshooting information.

See the following topics:

- Viewer Error: An error occurred while loading Workflow on page 44
- ActiveX Controls Fail to Load on page 45
- COLD Documents Are Not Crawled on page 47
- File Upload is Failing on page 47
- Access Denied by Business Data Connectivity on page 47
- Uninstalling the Search Adapter Affects Other Modules on page 47
- Notes, Redactions, Burned Markups, and Deficiencies on Documents with Overlays on page 47

Viewer Error: An error occurred while loading Workflow

When a user opens a document, the OnBase viewer may display the following error:

- An error occurred while loading Workflow.

When this occurs, the following error is logged to the Diagnostics Console:

- Generic Viewer Control could not obtain required Property - SessionId

These errors occur when the **Show Workflow viewer** option is selected in Central Administration, but the **OnBase URL** provided does not exactly match the **dmsVirtualRoot** value in the Web Server's Web.config.

To address this issue, access OnBase Settings in Central Administration. Verify that the **OnBase URL** exactly matches the value provided for **dmsVirtualRoot** in the Web Server's Web.config. Even the cases must match.

For configuration information for SharePoint 2016, see Enabling the Embedded Workflow Panel on page 21.

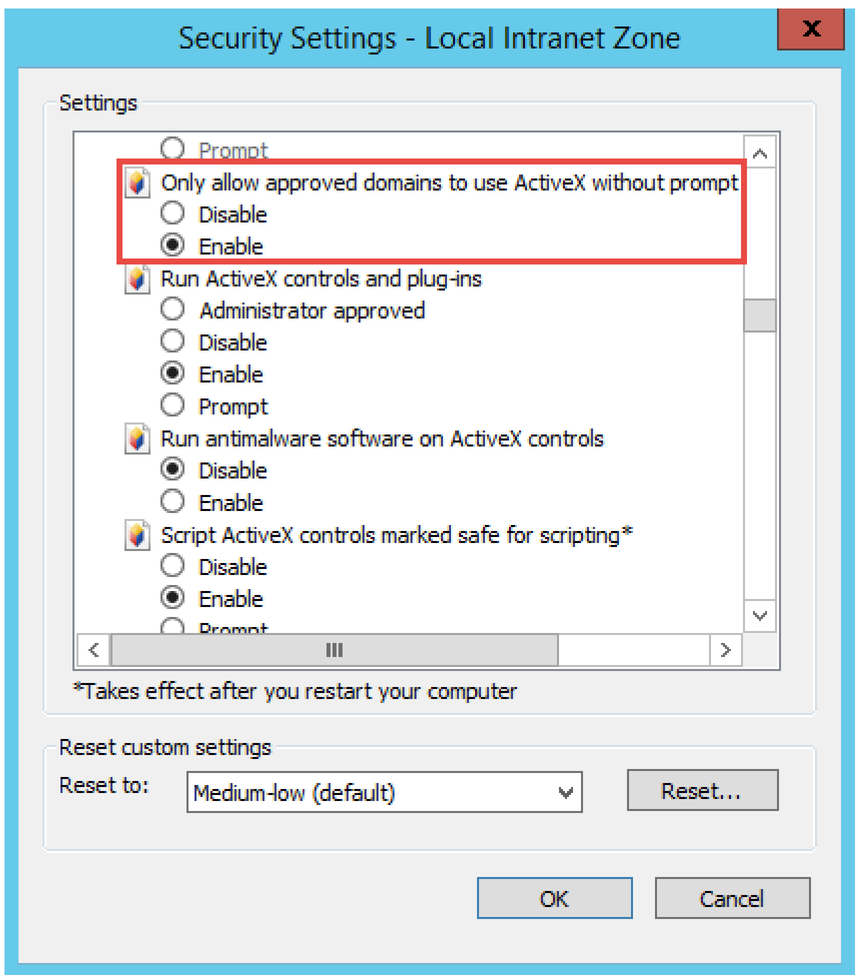
For configuration information for SharePoint 2019, see Enabling the Embedded Workflow Panel on page 39

ActiveX Controls Fail to Load

ActiveX controls may fail to load on workstations running Internet Explorer. Depending on the workstation's Internet Explorer security settings, one of the following symptoms may occur:

- The ActiveX control fails to load, and an icon with a red x is displayed in the ActiveX component's location.
- The Information Bar is displayed, providing the option to **Run** or **Don't Run** the ActiveX control. When the user clicks **Run**, the ActiveX control fails to load.
- Internet Explorer displays the error, **Failed to load [control name] ActiveX control**.

Cause — ActiveX controls may fail to load as a result of an ActiveX security setting in Internet Explorer. When enabled, the **Only allow approved domains to use ActiveX without prompt** setting can prevent ActiveX controls from loading properly in OnBase Web applications, including the OnBase Web Client, integrations for SharePoint and SAP, and the Medical Records Management Solution.



Solution — To ensure that ActiveX controls can load properly, preset the allowed OnBase ActiveX controls and the associated sites in the registry as described in “Per-Site ActiveX Controls,” available at the following location:
http://msdn.microsoft.com/en-us/library/dd433050(VS.85).aspx#_itpro

This article describes how to allow specific ActiveX controls to run for specific sites. See the “Code Samples” topic for sample scripts to update the registry. These scripts use the CLSIDs of the ActiveX controls being enabled. The CLSIDs for the OnBase Web ActiveX controls are provided in the following table:

ActiveX Control	{CLSID}
HylandDocumentSelect	{C5526B6F-F197-4705-A554-0612494ADD7D}
HylandViewer	{7F1D1BFA-E7D1-41E0-834F-98C2544CFB9D}
OBXAltDocumentSelect	{22198BEF-75F7-4117-885A-40CCC22F5C88}
OBXAltViewer	{B4E711EF-3137-4E2C-940B-1223BC7103C0}
OBXFileSvc	{CAAB6896-E95D-4476-9B0C-B968FADE56AD}
OBXPopup	{826F6DD1-7095-4BB5-BE96-CB4E8EE0C324}
OBXWebControls	{0FCFCB28-BAF6-422B-985D-A662E207F4A6}
OBXWebDocumentSelect	{A1955722-2B57-4B6D-B5E4-2900AE424672}
OBXWebPrint	{3F2F1376-BD9E-495D-BB8B-66E7A872160B}
OBXWebScan	{DB601251-258A-4743-A522-B45AC1E45B7F}
OBXWebViewer	{A8A7310D-814C-4695-AD02-235675E4BD60}
OBXWorkflowLoadBalance	{D6DB39B0-5BA5-476D-B0A5-3A2D7E937840}

Caution: Modify the registry at your own risk. Incorrectly editing the Windows registry can cause serious problems that may require you to reinstall your operating system. Be sure to back up the registry before making any changes to it. For more registry information, see the following Microsoft articles: http://support.microsoft.com/kb/256986 and http://technet.microsoft.com/en-us/library/cc725612.aspx

For example, a script that allows the ActiveX viewer (OBXWebViewer) to run on all domains may include the following:

```
[HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\Ext\Stats\{A8A7310D-814C-4695-AD02-235675E4BD60}\iexplore\AllowedDomains]

[HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\Ext\Stats\{A8A7310D-814C-4695-AD02-235675E4BD60}\iexplore\AllowedDomains\*]
```

More information about writing registry scripts can be found at the following location: http://support.microsoft.com/kb/310516

COLD Documents Are Not Crawled

If COLD documents are not being full-text indexed, ensure that the MIME type for the **Text Report Format** file format is set to **text/plain** in OnBase Configuration. See the Configuration help files for more information about file format configuration.

File Upload is Failing

To troubleshoot failed file upload, use your Internet browser to check the **SearchService.svc** path and verify that the **Service Page** is shown. If no page or a blank page is shown verify that:

- Anonymous access for the AppServer is the only setting enabled in IIS.
- The **httpsGetEnabled** setting in the AppServer **web.config** file is set to **false**.

If the Service Page is shown, but errors are still occurring, insert a period to change **SearchService.svc?Singlewsdl** to **SearchService.svc?Single.wsdl**.

Access Denied by Business Data Connectivity

Users may not have rights to add themselves to the BDC Metadata Store. If this occurs, verify that:

- The user required is correctly configured in **Central Administration** under **Security | Register managed accounts.**
- The correct permissions are listed in **Central Administration** under **Security | Configure service accounts.**

Uninstalling the Search Adapter Affects Other Modules

After the Search Adapter is uninstalled, OnBase Configuration Management may no longer work. This occurs because uninstalling the Search Adapter removes two files that OnBase Configuration Management needs: Hyland.Types.dll and Hyland.Diagnostics.dll.

To resolve this issue, run the OnBase Configuration Management installer again to repair the installation. The files are then added back.

Notes, Redactions, Burned Markups, and Deficiencies on Documents with Overlays

Notes, redactions, burned markups, and deficiencies on documents that have an overlay applied may encounter unexpected behavior. The position of notes, redactions, burned markups, and deficiencies may shift when the document is rendered.

The position shift may occur in the following instances:

- Text documents that contain overlays with an offset configured
- Text documents accessed using modules that render text documents as an image for display
- Image documents with overlays that do not have the same DPI or dimensions as the document

Caution: If a redaction, burned markup, or deficiency is not in the location you expect, do not save or sign the document until the location has been corrected. Saving or signing the document will permanently place the redaction, burned markup, or deficiency in the shifted position. In some instances, the location of a signature can only be changed by a system administrator.

When setting up overlays for documents that may also include notes, redactions, burned markups, or deficiencies:

- Ensure the dimensions of the overlay match the dimensions of the document.
- Do not use offsets with overlays since the document may contain notes, redactions, burned markups, or deficiencies.
- For text documents, use 96 DPI for overlays.
- For image documents, ensure the DPI of the overlay matches the DPI of the document.

A position shift can be corrected through the following methods:

- For text documents, recreate the overlay to match the dimensions of the document instead of using an offset. For example, add an empty space to the margin of the overlay instead of using an offset to account for this space.
- For text documents, the best practice is to set the DPI of the overlay to 96 DPI. Some OnBase modules render text documents as an image for display, and in most cases, the image is rendered at 96 DPI.
- For image documents, recreate the overlay to match the DPI and dimensions of the document.

If the issue still occurs, contact your first line of support.

Contacting Support

When contacting your solution provider, please provide the following information:

- The OnBase module where the issue was encountered.
- The OnBase version and build.
- The type and version of the connected database, such as Microsoft SQL Server 2014 or Oracle 12c, and any Service Pack that has been installed.
- The operating system that the workstation is running on, such as Windows 10 or Windows Server 2012 R2, and any Service Pack that has been installed. Check the supported operating systems for this module to ensure that the operating system is supported.

- The name and version of any application related to the issue.
- The version of Internet Explorer and any Service Pack that has been installed, if applicable.
- A complete description of the problem, including actions leading up to the issue.
- Screenshots of any error messages.

Supplied with the above information, your solution provider can better assist you in correcting the issue.

OnBase

Foundation EP5

Integration for Microsoft Search

Administration Guide

Foundation EP5

Overview

Each type of information to be crawled for indexing into Microsoft SharePoint must be assigned a Content Source. A Content Source is a logical grouping of documents. Content Sources are configured in the Configuration module and associated with Microsoft SharePoint sites. All Content Sources that are configured can be searched simultaneously through any Microsoft SharePoint site.

Configuration

Required User Configuration Rights

To configure Content Sources, the user must be granted the Document Configuration right. See the User Group Configuration for Configuration Rights topic in the Configuration module's documentation for further information.

Creating and Assigning Content Sources

Once created, a Content Source can be assigned to Document Type Groups, Document Types, and single documents. A Content Source can only be assigned to single document by means of a Workflow action. Content Sources are assigned to Document Type Groups and Document Types through the **Document Type Groups** and **Document Types** interfaces in the Configuration module.

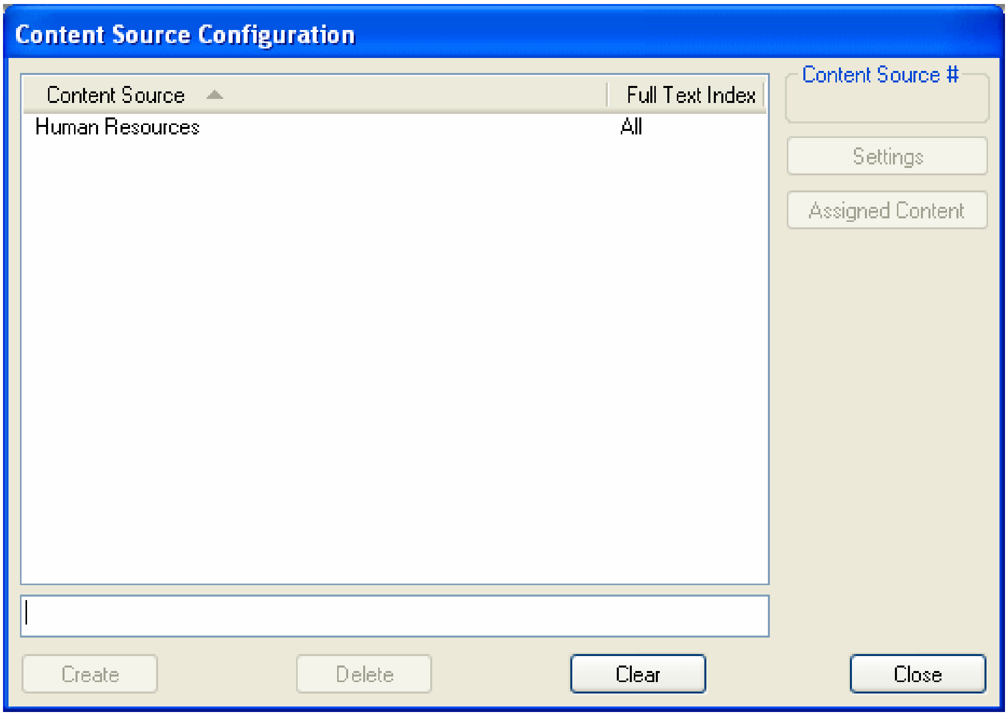
Tip: If you find the crawl process to be time consuming, try breaking crawls into manageable chunks. If you don't have time to crawl multiple Document Types at once, experiment with adding one Document Type per day to a Content Source, and then run an incremental crawl after each addition.

Note: If a TIFF iFilter is installed, then TIFF documents in a Content Source are OCRed during a crawl. The OCR process can significantly decrease performance during a crawl.

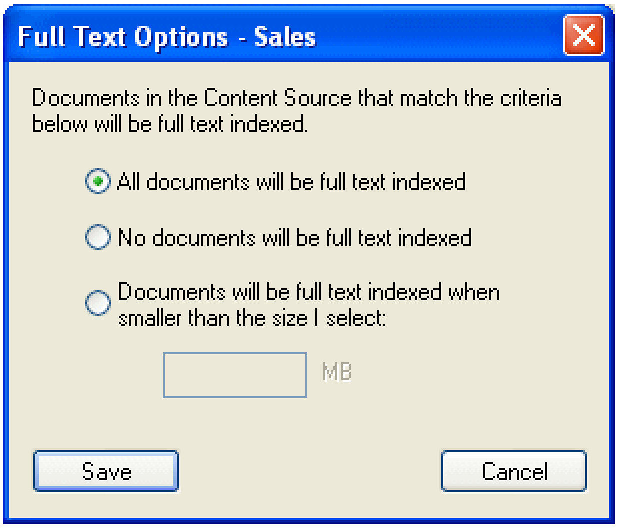
Creating a Content Source

To create a Content Source in OnBase:

1. In the Configuration module, select **Document | Content Sources**. The **Content Source Configuration** dialog box is displayed.



2. Type the name of the new Content Source in the data entry field and click **Create**.
3. Click **Settings**. The **Full Text Options** dialog box is displayed.



4. Select one of the following search options:

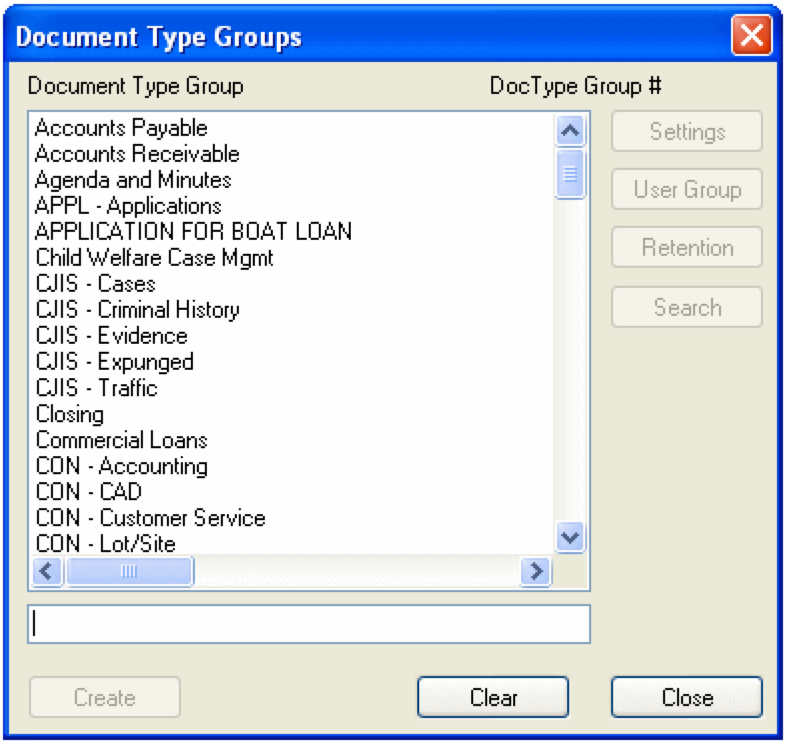
Option	Description
All documents will be full text indexed	Select to full-text index every document in the assigned Document Types. This is the default setting. When this option is selected, the **Full Text Index** column in the **Content Sources Configuration** dialog box displays a value of **All**.
No documents will be full text indexed	Select if none of the documents in the assigned Document Types should be full-text indexed. The metadata on these documents will still be indexed. Users will still be able to search for documents by name or Keyword Value. When this option is selected, the **Full Text Index** column in the **Content Sources Configuration** dialog box displays a value of **None**.
Documents will be full text indexed when smaller than the size I select	Select to full-text index only documents smaller than the specified size. In the field provided, type the size constraint (in megabytes) for documents that should be full-text indexed. When this option is selected, the **Full Text Index** column in the **Content Sources Configuration** dialog box displays a value of **Documents < XMB**, where **X** represents the specified size constraint.

5. Click **Save** when finished.
6. Click **Close** to exit the dialog box.

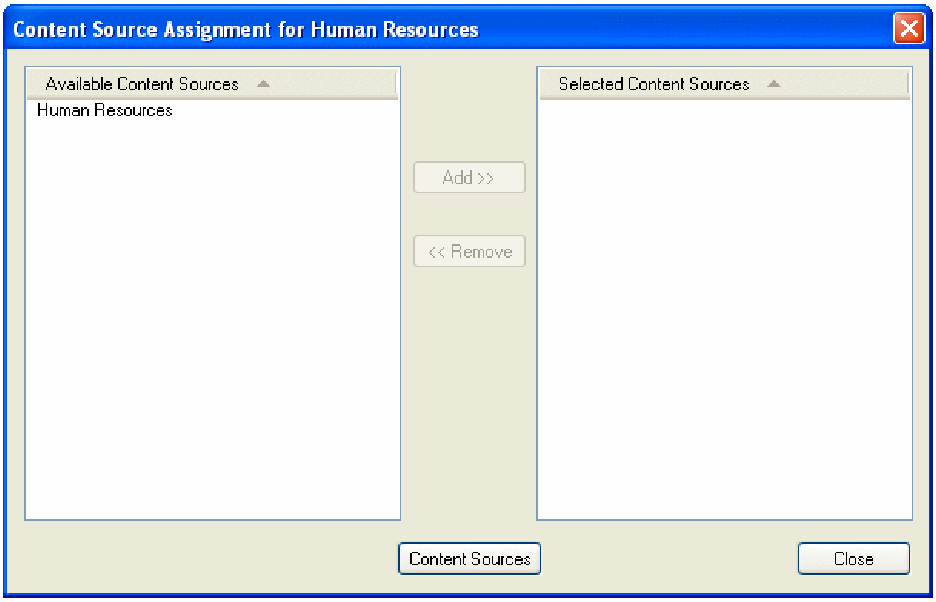
Assigning a Content Source to a Document Type Group

To assign a Content Source to a Document Type Group:

1. In OnBase Configuration, select **Document | Document Type Groups**. The **Document Type Groups** dialog box is displayed.



2. Select the Document Type Group that the Content Source will be assigned to and click the **Search** button. The **Content Source Assignment** dialog box is displayed.



3. Select the Content Source you wish to assign to the Document Type Group in the **Available Content Source**s list.

Tip: You can sort the list by clicking on **Available Content Sources**.

4. Double-click the Content Source or click the **Add>>** button to add the Content Source to the **Selected Content Sources** list. Multiple Content Sources may be assigned to the Document Type Group.

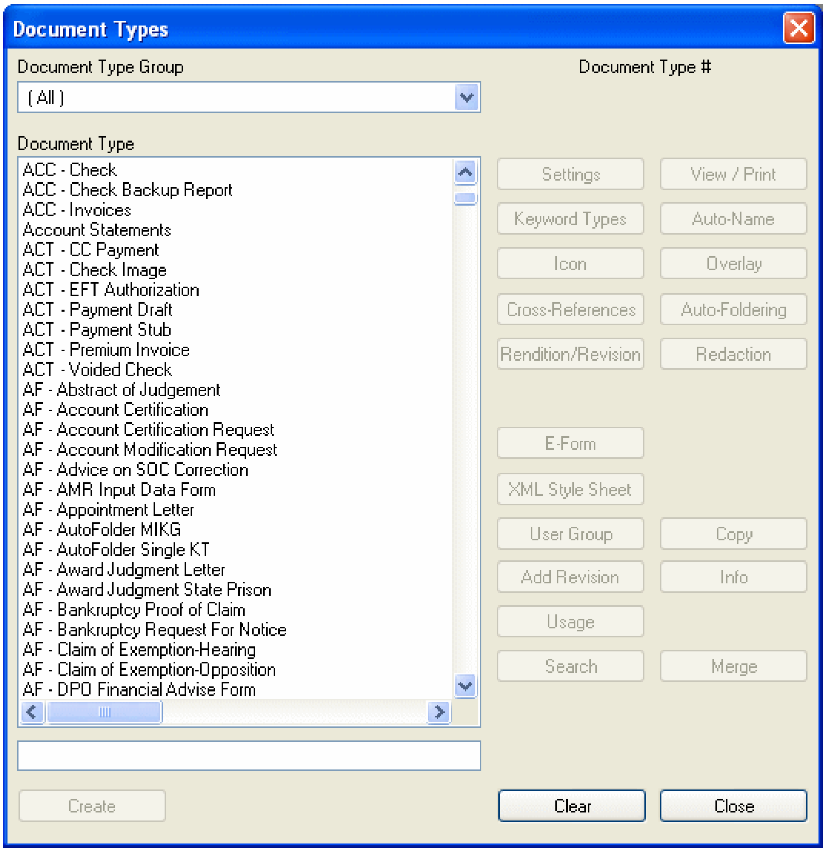
   To remove a Content Source assignment from the Document Type Group, select the Content Source in the **Selected Content Sources** list and click **<<Remove**.

   To configure a new Content Source, click the **Content Sources** button. The **Content Source Configuration** dialog box is displayed. For more information on creating Content Sources, see Creating a Content Source on page 52.
5. Click **Close** to exit the dialog box.

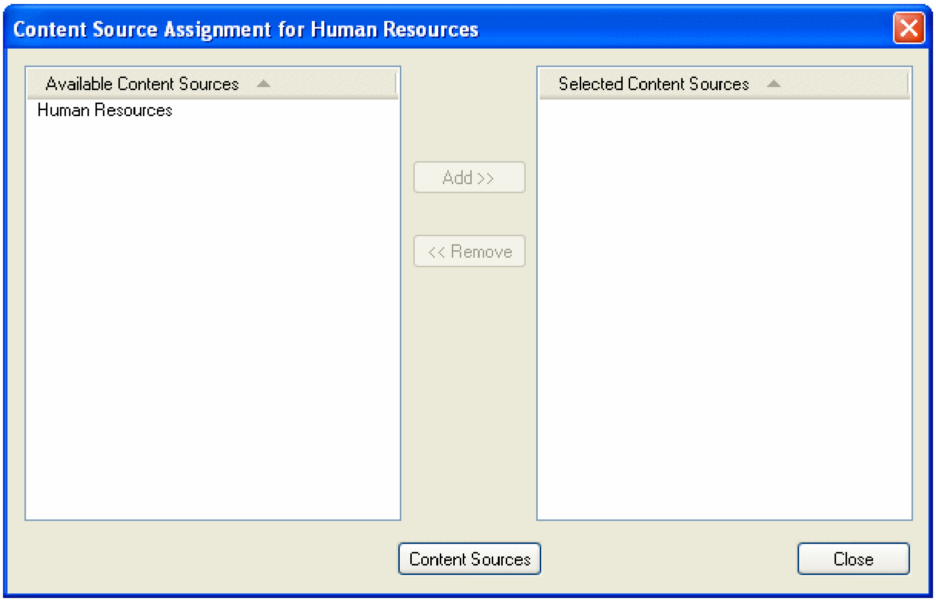
Assigning a Content Source to a Document Type

To assign a Content Source to a Document Type:

1. In the Configuration module, select **Document | Document Types**. The **Document Types** dialog box is displayed.



2. Select the Document Type that the Content Source will be assigned to and click the **Search** button. The **Content Source Assignment** dialog box is displayed.



3. Select the Content Source you want to assign to the Document Type in the **Available Content Source**s list.

Tip: You can sort the list by clicking on **Available Content Sources**.

4. Double-click the Content Source or click the **Add>>** button to add the Content Source to the **Selected Content Sources** list. Multiple Content Sources may be assigned to the Document Type.

   To remove a Content Source assignment from the Document Type, select the Content Source in the **Selected Content Sources** list and click **<<Remove**.

   To configure a new Content Source, click the **Content Sources** button. The **Content Source Configuration** dialog box is displayed. For more information on creating Content Sources, see Creating a Content Source on page 52.
5. When finished, click the **Close** button to exit the dialog box.

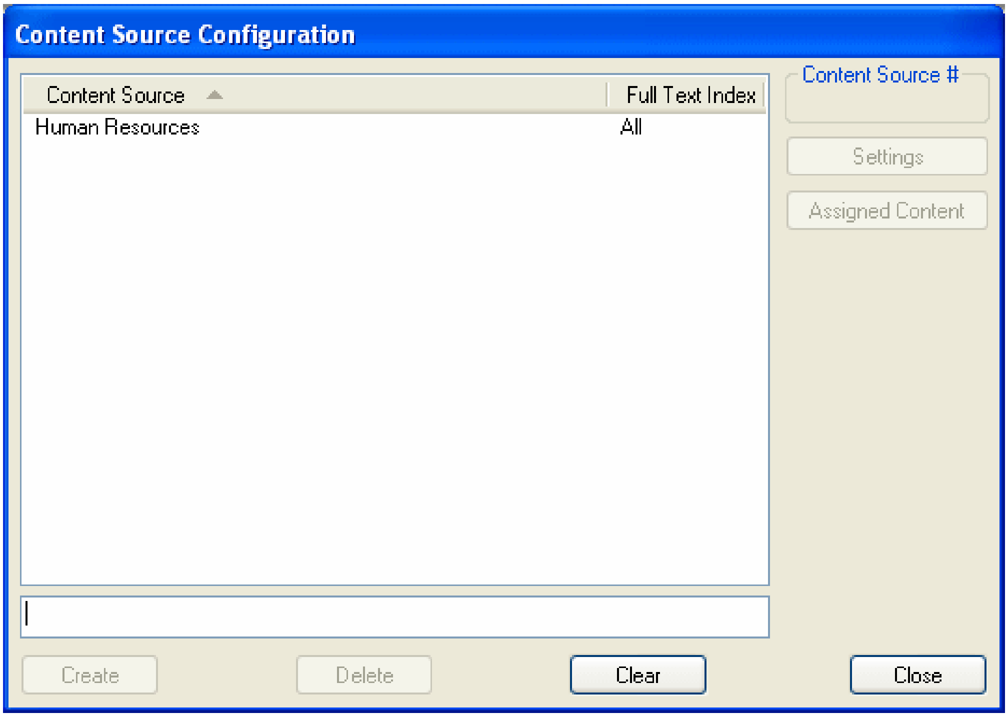
Assigning a Content Source to a Single Document

Content Sources can only be assigned to single documents by means of the Workflow actions **Doc - Add This Document to Content Source** and **Doc - Add Related Document to Content Source**. This requires the Workflow module to be properly licensed and configured. For more information, please see the Workflow Module Reference Guide or Help file.

Viewing Content Sources

After assigning Content Sources to Document Type Groups and Document Types, you can view the information that is in each Content Source.

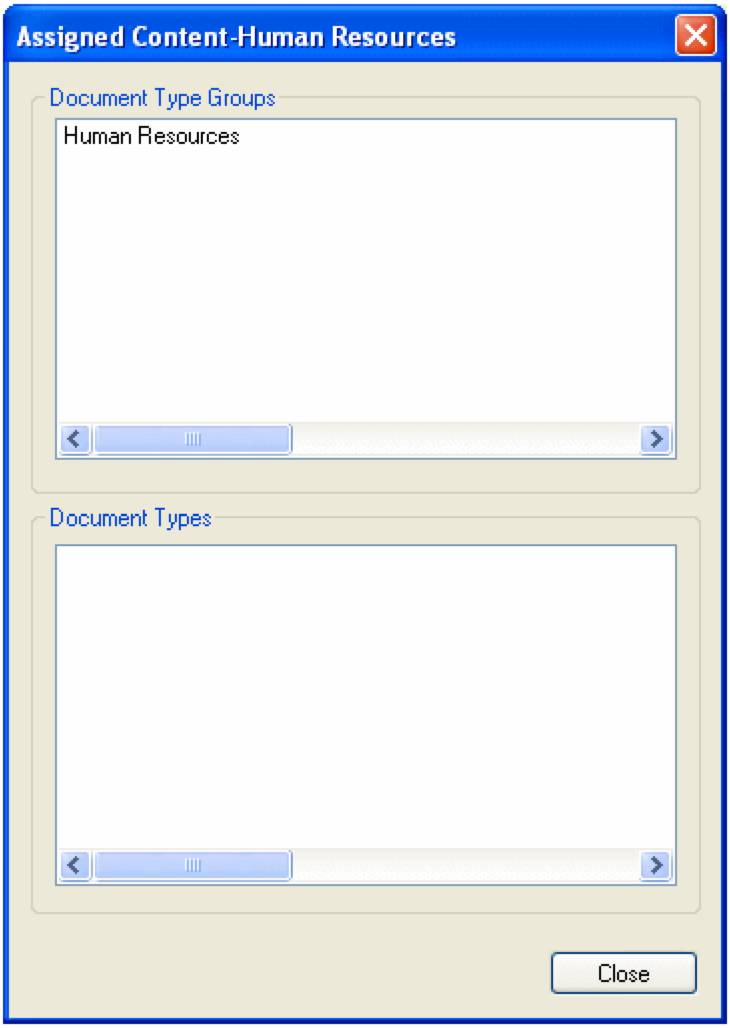
1. In the Configuration module, select **Document | Content Sources**. The **Content Source Configuration** dialog box is displayed.



The **Full Text Index** column indicates the settings selected for each Content Source:

- **All**: All documents in the assigned Document Type will be full-text indexed.
- **None**: None of the documents in the assigned Document Type will be full-text indexed. Only the document metadata is indexed.
- **Documents < XMB**: Documents smaller than the specified size will be full-text indexed.

2. Select the desired Content Source and click the **Assigned Content** button. The **Assigned Content** dialog box is displayed.



Document Type Groups that the Content Source has been assigned to are displayed in the **Document Type Groups** field. Document Types that the Content Source has been assigned to are displayed in the **Document Types** field.

Note: Only the Document Types and Document Type Groups that have been specifically assigned to the Content Source will be displayed in the **Assigned Content**. For example, if a Content Source is assigned to a Document Type Group that contains three Document Types, only the Document Type Group will be displayed in the dialog box, because it was specifically assigned.

3. When finished, click **Close** to exit the dialog box.

The following topics describe how to administer the OnBase Integration for Microsoft Search:

Types of Crawls

Once Content Sources are configured, they must be crawled by Microsoft SharePoint in order for their contents to be available for full-text or metadata searching. Crawling is the process by which Microsoft SharePoint indexes information for searches. Crawls can be scheduled to automatically update the content available for full-text or metadata searching, or they can be performed manually. Two types of crawls are available: Full Crawl and Incremental Crawl.

Full Crawl

Each time a Full Crawl takes place, the entire Content Source is crawled for inclusion in full-text or metadata searching. A Full Crawl is ideal for a new Content Source, but is not recommended to be performed each time new information is added to a Content Source due to performance reasons.

Incremental Crawl

Each time an Incremental Crawl is performed, only content that has been added or changed in the Content Source since the last crawl is crawled for inclusion in full-text or metadata searching. An Incremental Crawl is ideal when a Content Source is updated and only new or modified content needs to be updated for searching. Content that has already been crawled will remain available for full-text or metadata searching.

An Incremental Crawl also updates the SharePoint index when documents associated with a Content Source are modified. Modifications include changing Keyword values, re-indexing, and revising documents.

Crawl Administration

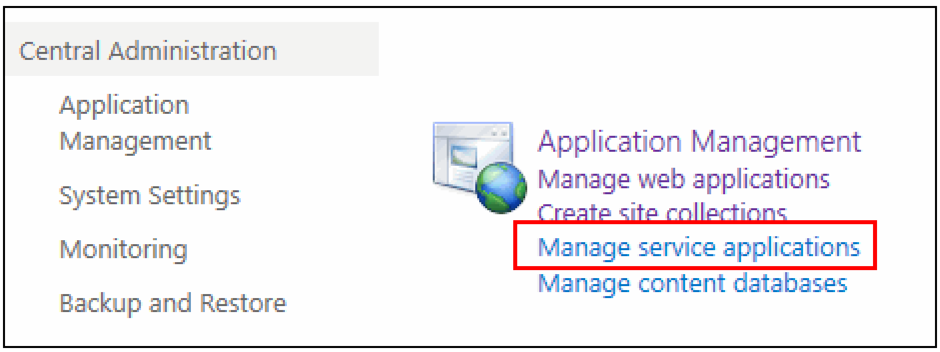
The following topics describe how to run and schedule crawls for 2013 and 2016 versions of SharePoint Server:

- Manual Crawl on page 61
- Scheduled Crawl (SharePoint 2016) on page 63
- Scheduled Crawl (SharePoint 2019) on page 64
- Viewing the Crawl Status on page 66

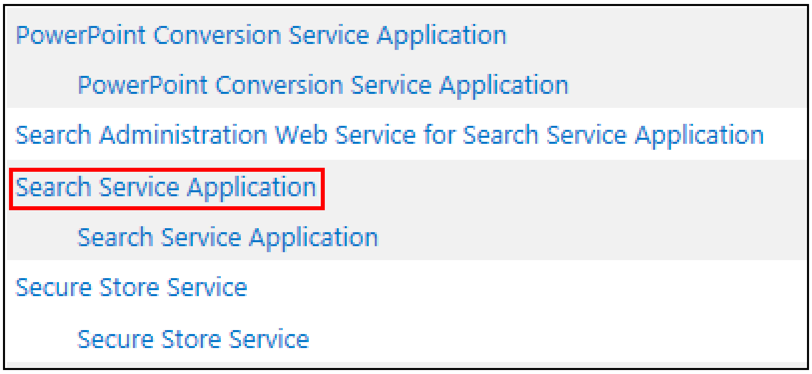
Manual Crawl

Manual crawls are performed through the **Manage Content Sources** administration page in Central Administration.

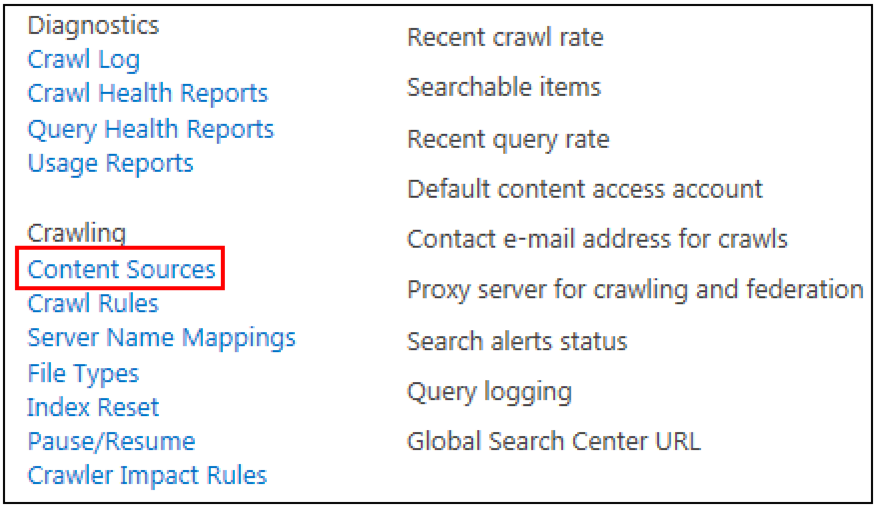
1. Open Central Administration.
2. Under **Application Management**, click **Manage service applications**.



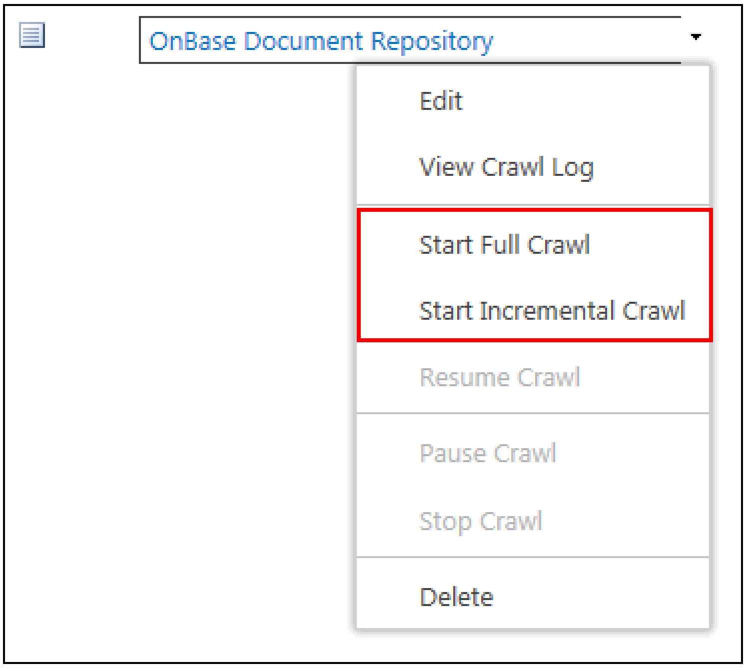
3. Click the first entry for **Search Service Application**.



4. Under **Crawling** on the left, click **Content Sources**.



5. Click the **OnBase Document Repository**.
6. Select **Start Full Crawl** or **Start Incremental Crawl**. The crawl is started.



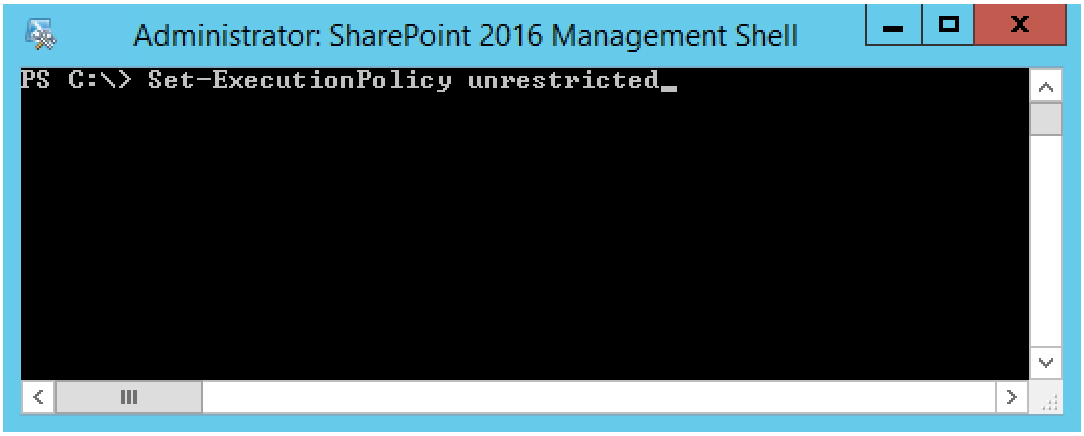
Scheduled Crawl (SharePoint 2016)

Crawls for 2016 versions of SharePoint are scheduled using SharePoint 2016 Management Shell. The following steps describe how to run commands to schedule crawls of the OnBase repository.

For detailed information about the parameters used in these commands, refer to the TechNet article at http://technet.microsoft.com/en-us/library/ff607675.aspx. This article describes how to use the Set-SPEnterpriseSearchCrawlContentSource command to configure crawl properties.

1. Open SharePoint 2016 Management Shell on the SharePoint server. Select **Start | All Programs | Microsoft SharePoint 2016 Products | SharePoint Management Shell**.
2. Run the following command.

```
Set-ExecutionPolicy unrestricted
```



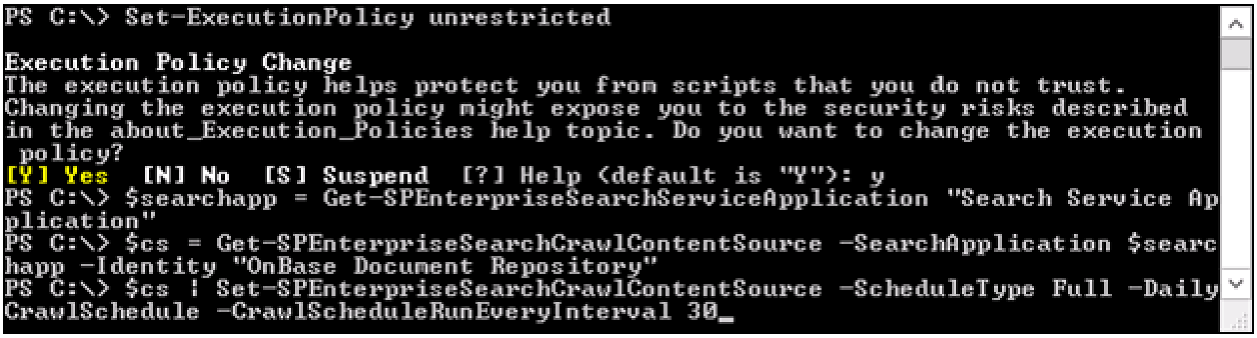
3. Press **Y** and **ENTER** when prompted to confirm.
4. Run the following commands:

```
$searchapp = Get-SPEnterpriseSearchServiceApplication "Search Service Application"

$cs = Get-SPEnterpriseSearchCrawlContentSource -SearchApplication $searchapp -
Identity "OnBase Document Repository"
```

5. Run the following command to schedule a Full Crawl to occur every 30 days. To change the number of days, replace **30** with the intended interval.

```
$cs | Set-SPEnterpriseSearchCrawlContentSource –ScheduleType Full
-DailyCrawlSchedule -CrawlScheduleRunEveryInterval 30
```



6. Run the following command to schedule an Incremental Crawl to occur every hour (**60** minutes) of every day for 60 days (**1440** hours). To change the crawl interval, replace **60** with the intended number of minutes between each crawl. To change the duration, replace **1440** with the number of hours that the specified interval should repeat.

```
$cs | Set-SPEnterpriseSearchCrawlContentSource –ScheduleType Incremental
-DailyCrawlSchedule -CrawlScheduleRepeatInterval 60 -CrawlScheduleRepeatDuration
1440
```

7. Close SharePoint 2016 Management Shell.
8. Restart the **SharePoint Server Search 14** service running on the SharePoint server.
9. Restart IIS. In a **Run** dialog box, enter **iisreset**.

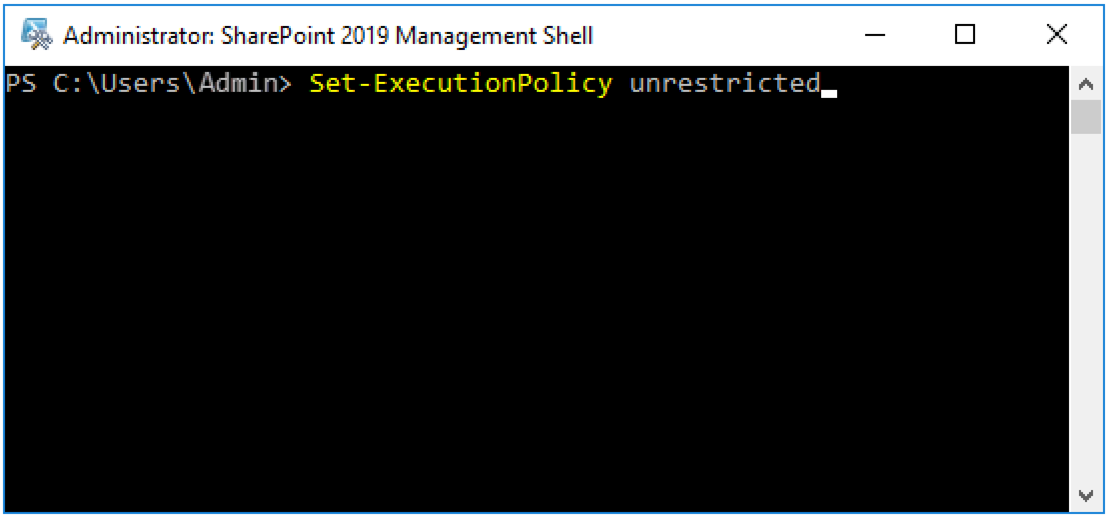
Scheduled Crawl (SharePoint 2019)

Crawls for 2019 versions of SharePoint are scheduled using SharePoint 2019 Management Shell. The following steps describe how to run commands to schedule crawls of the OnBase repository.

For detailed information about the parameters used in these commands, refer to the TechNet article at http://technet.microsoft.com/en-us/library/ff607675.aspx. This article describes how to use the Set-SPEnterpriseSearchCrawlContentSource command to configure crawl properties.

1. Open SharePoint 2019 Management Shell on the SharePoint server. Select **Start | All Programs | Microsoft SharePoint 2019 Products | SharePoint Management Shell**.
2. Run the following command.

```
Set-ExecutionPolicy unrestricted
```



3. Press **Y** and **ENTER** when prompted to confirm.
4. Run the following commands:

```
$searchapp = Get-SPEnterpriseSearchServiceApplication "Search Service Application"

$cs = Get-SPEnterpriseSearchCrawlContentSource -SearchApplication $searchapp -
Identity "OnBase Document Repository"
```

5. Run the following command to schedule a Full Crawl to occur every 30 days. To change the number of days, replace **30** with the intended interval.

```
$cs | Set-SPEnterpriseSearchCrawlContentSource –ScheduleType Full
-DailyCrawlSchedule -CrawlScheduleRunEveryInterval 30
```

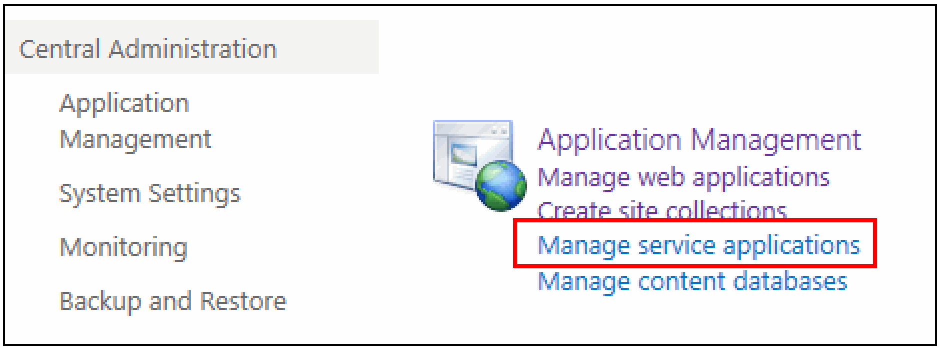
6. Run the following command to schedule an Incremental Crawl to occur every hour (**60** minutes) of every day for 60 days (**1440** hours). To change the crawl interval, replace **60** with the intended number of minutes between each crawl. To change the duration, replace **1440** with the number of hours that the specified interval should repeat.

```
$cs | Set-SPEnterpriseSearchCrawlContentSource –ScheduleType Incremental
-DailyCrawlSchedule -CrawlScheduleRepeatInterval 60 -CrawlScheduleRepeatDuration
1440
```

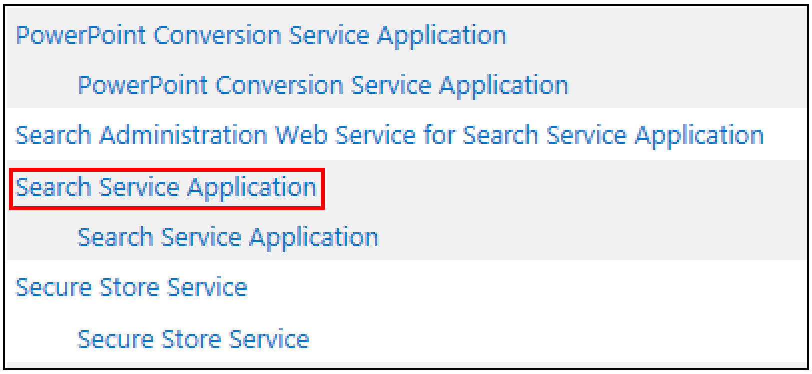
7. Close SharePoint 2019 Management Shell.
8. Restart the **SharePoint Server Search 14** service running on the SharePoint server.
9. Restart IIS. In a **Run** dialog box, enter **iisreset**.

Viewing the Crawl Status

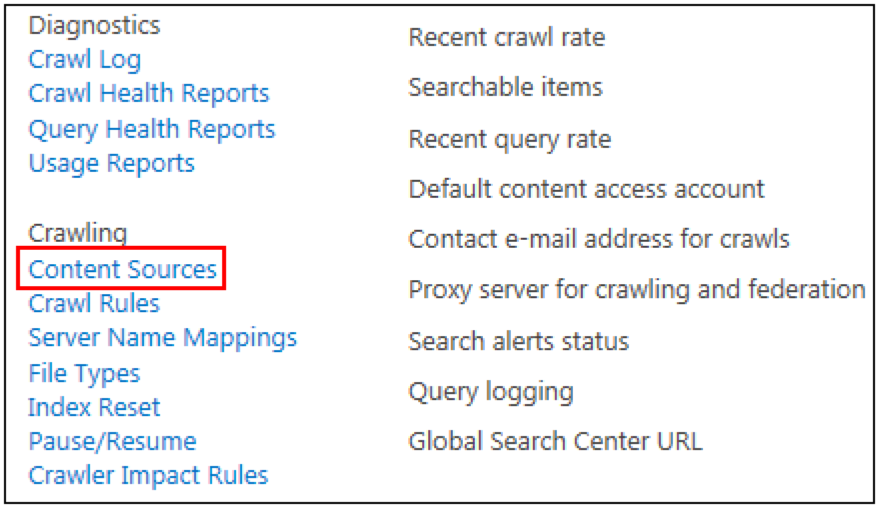
1. Open Central Administration.
2. Under **Application Management**, click **Manage service applications**.



3. Click the first entry for **Search Service Application**.



4. Under **Crawling** on the left, click **Content Sources**.



5. Check the crawl status for the **OnBase Document Repository** row.
   - **Status** indicates whether a Full or Incremental Crawl is in progress.
   - **Current crawl duration** indicates how long the current crawl has been running, if a crawl is in progress.
   - **Last crawl duration** indicates how long the last crawl (either type) lasted.
   - **Last crawl completed** indicates the last date and time that a crawl (either type) was finished.
   - **Next Incremental Crawl** indicates when the next Incremental Crawl is scheduled, if applicable.
   - **Next Full Crawl** indicates when the next Full Crawl is scheduled, if applicable.

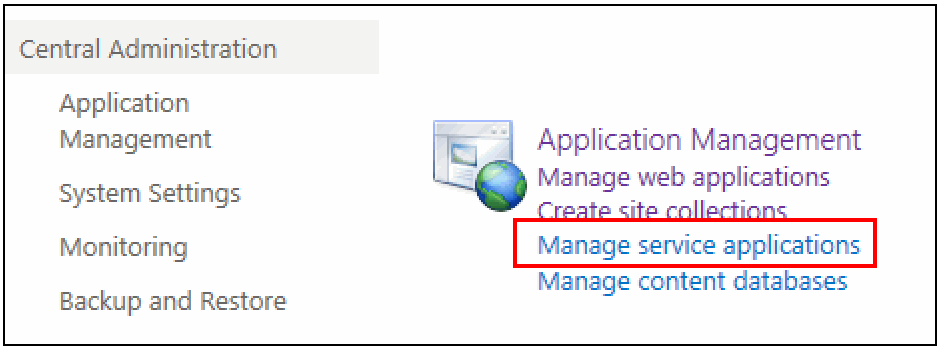
Viewing the Crawl Log

Each time a crawl is performed, either manually or in scheduled form, a crawl log is created. This log can be used for troubleshooting purposes should the crawl not execute as planned.

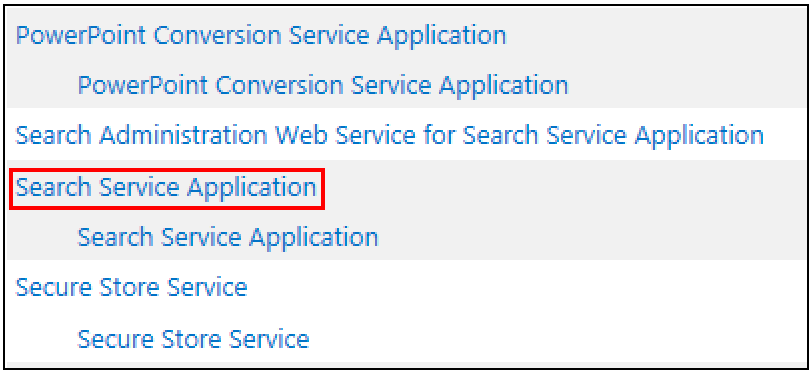
To view the crawl log, you must have sufficient privileges to access the **Services Administration** pages in Microsoft SharePoint. For more information, contact your Microsoft SharePoint system administrator.

To access the crawl log in the 2013 and 2016 versions of SharePoint Server:

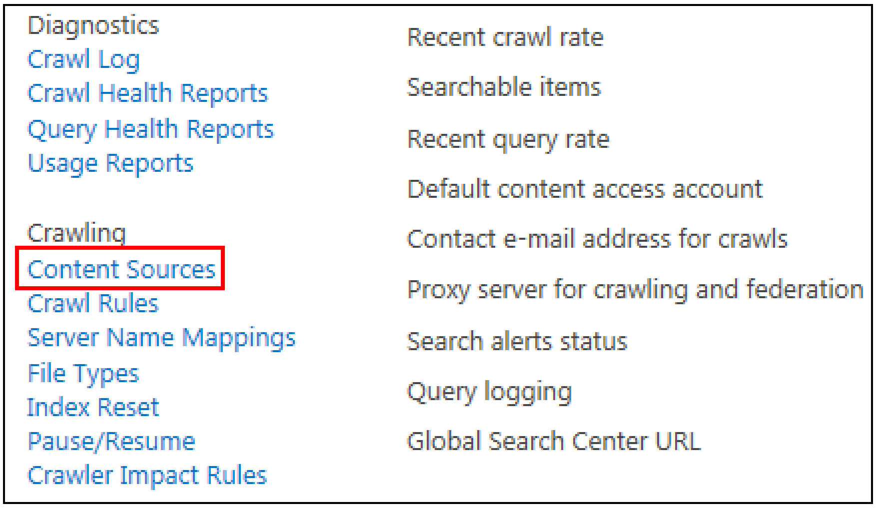
1. Open Central Administration.
2. Under **Application Management**, click **Manage service applications**.



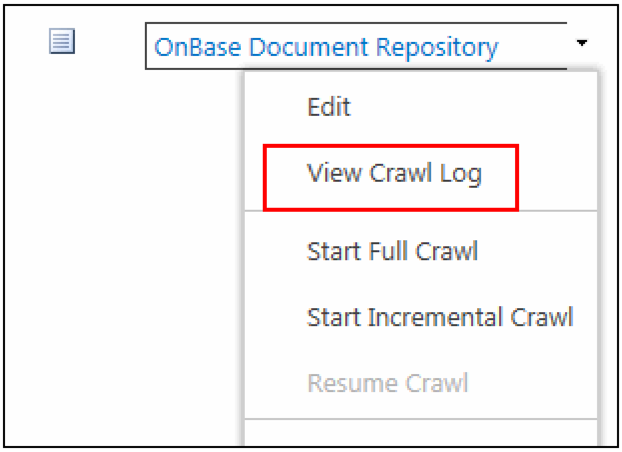
3. Click the first entry for **Search Service Application**.



4. Under **Crawling** on the left, click **Content Sources**.



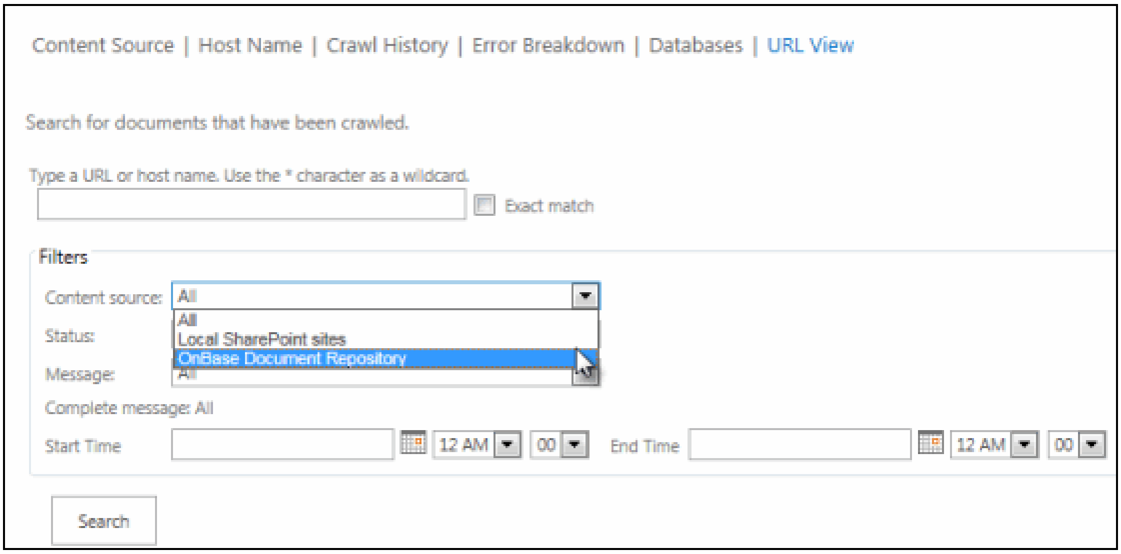
5. Click the **OnBase Document Repository**.
6. Select **View Crawl Log** from the resulting menu.



The Crawl Log page displays a summary of all crawls.

7. Click the **OnBase Document Repository** to display its Crawl History. This page displays more detailed information about each crawl.

8. To view all messages pertaining to each crawl, click the **URL View** link. Any messages associated with the crawls are displayed underneath the entry for the crawl. Use the drop-downs provided to filter messages by content source and status.



For example, if a crawl runs after a document is deleted from the OnBase Content Source, the following message is logged: **Deleted by the gatherer (This item was deleted because the crawler did not encounter it during the last incremental crawl.)**

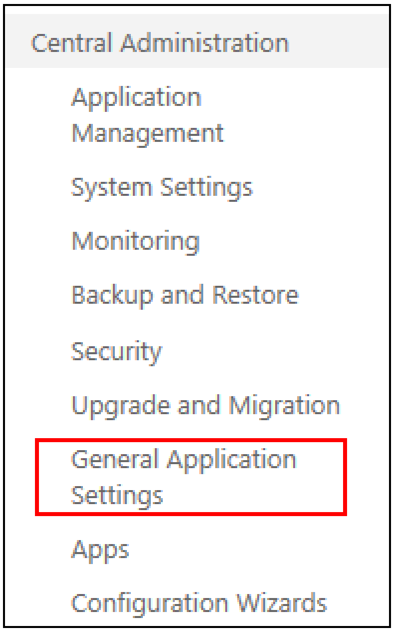
Changing the Timeout Settings

Timeout settings control how long the SharePoint server waits when connecting to other services. You may need to increase the timeout settings if crawls fail due to timeout errors.

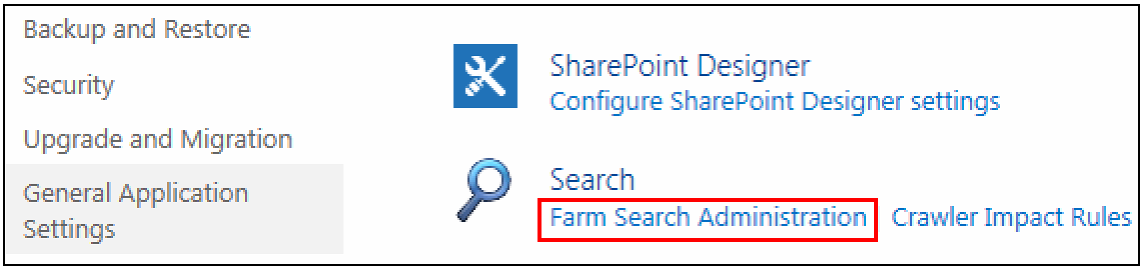
Note: If a TIFF IFilter is installed, then TIFF documents in a Content Source are OCRed when crawled. The OCR process can significantly decrease performance during a crawl.

To change the timeout settings in the 2013 and 2016 versions of SharePoint Server:

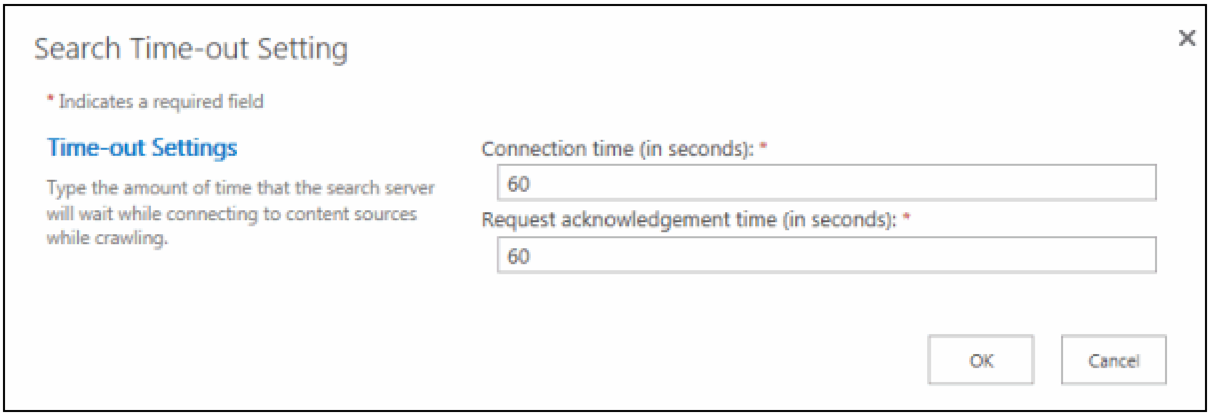
1. Open Central Administration.
2. Click **General Application Settings**.



3. Under **Search**, click **Farm Search Administration**.



4. Click the value provided for **Time-out (seconds)**. The **Search Time-out Setting** dialog box is displayed.



5. Increase each of the following settings to allow the crawl to complete without errors. 300 seconds (5 minutes) is a good starting point. The amount of time will vary depending on the size of documents being crawled; very large documents will require a higher setting.
   - In the **Connection time** field, enter the number of seconds the server should wait while connecting to other services. 300 seconds is the default.
   - In the **Request acknowledgement time** field, enter the number of seconds the server should wait for the connection request to be acknowledged. 300 seconds is the default.
6. Click **OK** to save your changes.

Maintenance

There are no module-specific maintenance requirements for Integration for Microsoft Search.

OnBase Foundation EP5

Integration for Microsoft Search

User Guide

Foundation EP5

Usage

Searching for documents in the OnBase repository through the Microsoft SharePoint interface is just like searching for any other document through the Microsoft SharePoint interface.

When a term is typed into the **Go Search** data entry field, a search is performed on all documents that are associated with the selected site. Results residing in OnBase are listed with a hyperlink that displays the document when clicked. The document is displayed in the OnBase viewer.

Depending on your system's settings, some OnBase documents may not be full-text indexed. Instead, only the document metadata is indexed, allowing users to retrieve documents by Keyword Value or name. When a search retrieves a document that has not been full-text indexed, the document's description says **Only document metadata indexed**.

Tip: To open search results in a new window, right-click the hyperlink and select **Open in New Window**.

For more information about the OnBase viewer, please see the Appendix, Viewing Documents on page 77.

System Interaction

The following topics describe how the Integration for Microsoft Search interacts with other OnBase modules.

Archive Services for Microsoft SharePoint

Documents that have been archived into OnBase using Archive Services for Microsoft SharePoint can be added to the SYS - Archive Services Content Source. When the **Add to Search** option is selected in Archive Services for Microsoft SharePoint, the selected document(s) will be added to the SYS - Archive Services Content Source the next time a crawl is performed. The **SYS - Archive Services Content Source** document is automatically created in OnBase the first time an archived document is crawled for searching.

Batch Import Applications

The Integration for Microsoft Search can be used to search for documents imported by batch import applications, such as COLD, Document Imaging, Document Import Processor (DIP), and XML Tag Import Processor (TIP).

Before they can be crawled, batch-imported documents must be committed. They must also belong to a Document Type that is assigned a Content Source.

Encrypted Alpha Keywords

Encrypted Keyword Types are not indexed by the Integration for Microsoft Search. For this reason, users are not able to search for encrypted Keyword values using the Integration for Microsoft Search. Documents containing encrypted Keyword values can still be found by searching for other non-encrypted Keyword values or text within the documents.

Exporting and Importing

Integration for Microsoft Search configuration items can be exported and imported using OnBase Configuration or OnBase Studio.

Note: Export packages can only be imported using the OnBase Configuration module or using the module from which they were exported.

Configuration

In OnBase Configuration, in addition to the configuration items listed in the **System Administration** module reference guide, Content Sources for Integration for Microsoft Search configuration items can be exported and imported.

Note: Content Sources are exported implicitly when the Document Types with which they are associated are exported. Content Sources are not available to be exported explicitly.

When importing and export package, additional associated configuration items may require decisioning.

For more information, see the **System Administration** module reference guide.

Studio

In OnBase Studio, in addition to the configuration items listed in the **Studio** module reference guide, Content Sources for Integration for Microsoft Search configuration items can be exported and imported.

Note: Content Sources are exported implicitly when the Document Types with which they are associated are exported. Content Sources are not available to be exported explicitly.

When importing an export package, additional associated configuration items may require decisioning.

For more information, see the **Studio** module reference guide.

Physical Records Management

The Integration for Microsoft Search can index the following fields of physical record locators: Repository Name, Content Description, Location Description, Sub-location (1-4), and Status (checked out or checked in). A physical record locator can have any number of locations; all of them are returned in a search.

Workflow

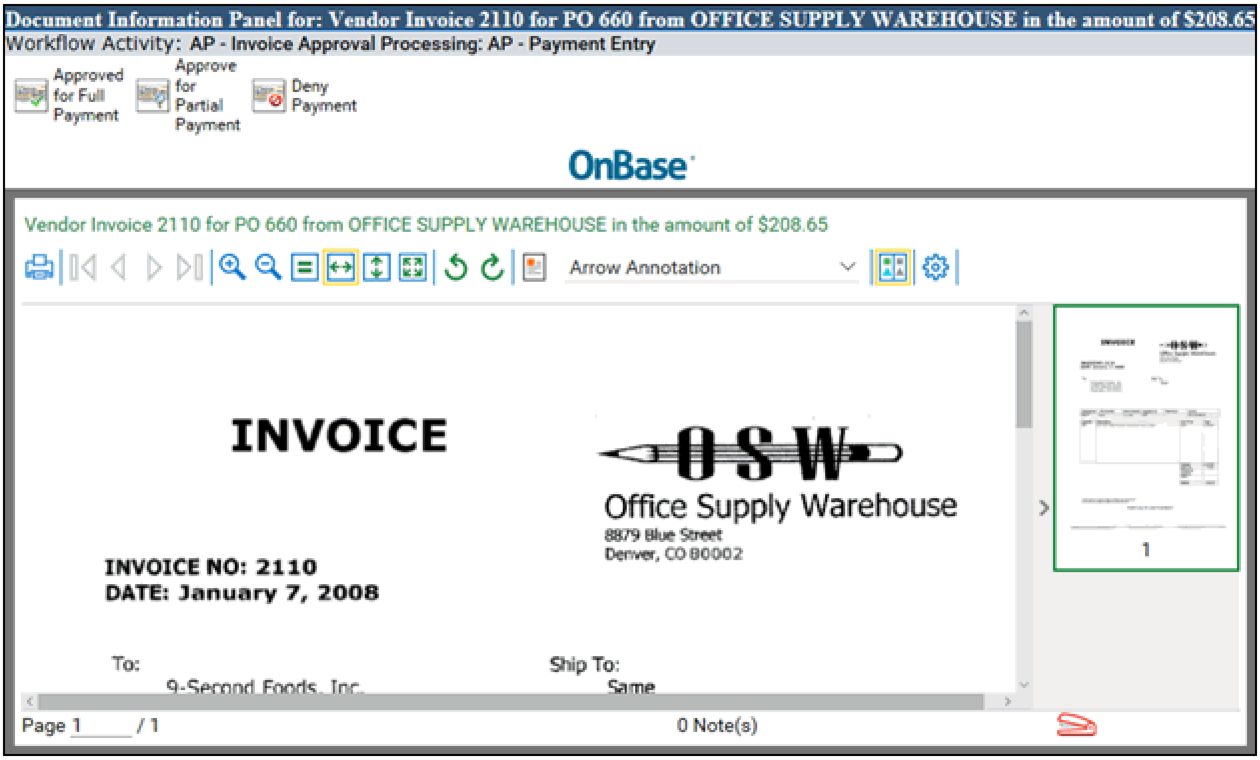
Documents can be added to a specified Content Source via the Workflow action **Add Document to Content Source**.The document(s) will automatically be added to the Content Source and will be crawled for full-text searching at the next scheduled crawl.

This section is a guide to using the document viewer that is opened when you retrieve documents from OnBase through Microsoft SharePoint.

Note: If a document is deleted from OnBase, then the message **No Documents Found** is displayed when you click the document's link in SharePoint.

Workflow Viewer

Your solution may be set up to use the integrated OnBase Workflow viewer to display documents. This viewer displays a document's Workflow status, related documents, and available tasks.



Viewer components are described in the following table:

Component	Descriptions
Document Information Panel	Displays the document's Auto-Name and Workflow status. If you open any related documents in the viewer, you can click the Auto-Name to return to the original document. The **Workflow Activity** status displays the Workflow life cycle name followed by the current queue(s). If the document resides in multiple life cycles and queues, the format is **Life cycle 1: Queue A, Queue B; Life cycle 2: Queue C.** If the document resides in multiple queues, the ad-hoc tasks and related documents belong to the queue in bold.
Ad Hoc Tasks	Displays ad hoc tasks you can perform on the document. Available tasks vary per queue.
Related Documents	Displays other documents related to the current document. You can select a document to display it in the viewer. To return to the original document, click the document's Auto-Name in the **Document Information Panel**.
Document Viewer	Displays the currently selected document. For information about using the document viewer, see Viewing Documents on page 79.

When you perform an ad hoc task that transitions a document out of its current queue, the **Workflow Activity** status is updated to reflect that transition. If you have privileges to access the next queue in the life cycle, the **Workflow Activity** status displays the queue's name. If you do not have privileges to access any of the document's queues, the **Workflow Activity** status is removed, and the document remains available within SharePoint for reference.

Viewing Documents from Links

Your solution may be configured to display SharePoint document links as DocPop, PDFPop, UnityPop, or AEPop links. Depending on which is used, the document is displayed in a different viewer:

- DocPop links are displayed in either the HTML or ActiveX Web Client viewer. For more information on the Web Client viewer, see the following sections.
- PDFPop links are displayed as a PDF in a PDF viewer.
- UnityPop and AEPop links are displayed in the Unity Client viewer. For more information on the Unity Client viewer, see the **Unity Client** documentation.

Viewing Documents

When you open a document, it is displayed in the Document Viewer. Depending on the Document Type and your User Groups and Rights, you might see different toolbars, icons and other graphics that indicate the presence of notes or annotations.

If a document is open by another user in a different session, the following message is displayed:

While you are able to view the document, you cannot do the following:

- Re-index the document
- Save the rotation of an HTML image

Document Viewer

Note the following when working in the Document Viewer:

- The Document Viewer toolbar provides a variety of options for viewing or changing the document as well as navigation features. See Toolbars in the Web Client on page 109.
- From an open document, right click to receive a list of possible Document Options.
- There are a number of shortcut key combinations that can help you navigate from page to page within a multi-page document, and from place to place within a page. See Document Viewer Shortcuts on page 139.

Documents generated by external applications, such as Microsoft Office and PDF documents, that are stored in their native formats may open externally in their native applications, or they may open within the browser window using viewers based on those applications. See the application help for information on these types of documents and their options.

PDF Viewers

PDF documents may be displayed in the Web Client using either the web browser's configured PDF viewer (typically a built-in viewer or browser extension) or the Web Client PDF viewer. The Web Client PDF viewer allows you to use standard Document Viewer toolbar and right-click functionality, such as applying notes and annotations to specific positions. The type of PDF viewer used in the Web Client is determined by your system administrator.

Document Viewer Shortcuts

The following keyboard shortcuts can be used when viewing documents:

Navigating Documents

The following keyboard functions allow you to navigate a document.

Shortcut	Action
Page Up	Quickly scrolls up the current page.
Page Down	Quickly scrolls down the current page.
Up Arrow	Slowly scrolls position on the current page up.
Down Arrow	Slowly scrolls position on the current page down.
Right Arrow	Slowly scrolls position on the current page right.
Left Arrow	Slowly scrolls position on the current page left.
Ctrl + Page Up	Navigates to the top of the previous page.
Ctrl + Page Down	Navigates to the top of the next page.
Home	Navigates to the top of the current page.
End	Navigates to the bottom of the current page.
Ctrl + Home	Navigates to the top of the first page. **Note:** This function is not supported in the ActiveX Web Client.
Ctrl + End	Navigates to the top of the last page.
Ctrl + Up Arrow	Quickly scrolls up the current page.
Ctrl + Down Arrow	Quickly scrolls down the current page.
Ctrl + Right Arrow	Quickly scrolls position on the current page right.
Ctrl + Left Arrow	Quickly scrolls position on the current page left.

Zooming In and Out

The following keyboard functions allow you to zoom in and out while viewing a document.

Shortcut	Action
+ (on numeric keypad)	Zooms in.
- (on numeric keypad)	Zooms out.
Ctrl + mouse wheel	Zooms in and out.

Searching for Internal Text

The following keyboard shortcuts are available for the Internal Text Search toolbar when the cursor is in the **Search String** field. These shortcuts are not available if you are using the **Find Next** and **Find Previous** buttons.

Shortcut	Action
Enter	Starts the search or finds the next instance of the text if the search is in progress.
Shift + Enter	Finds the previous instance of the text.

Viewing Previous or Next Documents

From an open document, the following keyboard shortcuts allow you to view the previous and next documents in a document results list.

Shortcut	Action
Ctrl + F6	Displays the previous document in a document results list.
Ctrl + F7	Displays the next document in a document results list.

Note: Shortcut keys do not work when the cursor is positioned over a thumbnail and Thumbnail Zoom is enabled.

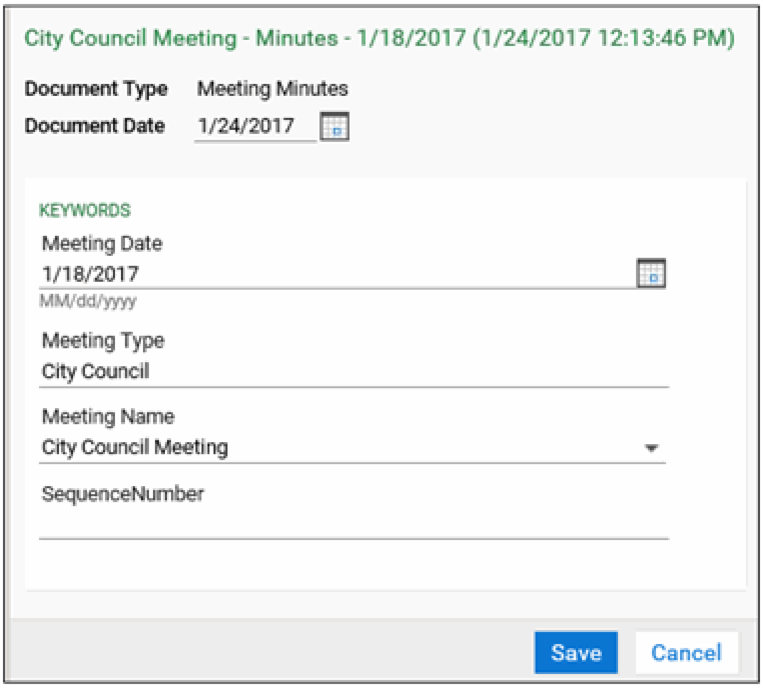
Access a Document's Keyword Values

Some documents have one or more Keyword Values displayed automatically when you open the document. You can also view Keyword Values that are not auto-displayed. Depending on your system's configuration, these Keyword Values may be masked or read-only.

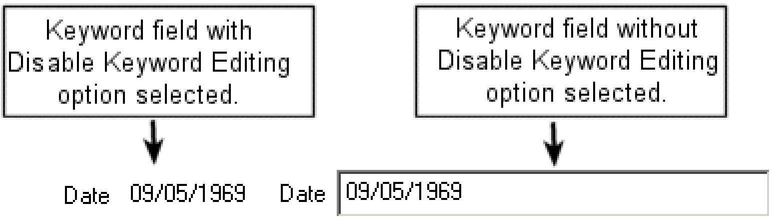
To access a document's Keyword Values, do one of the following:

- From a document in the Document Search Results list, right-click and select **Keywords** to display the **Add/Modify Keywords** dialog box.
- From an open image or text document, right-click and select **Keywords** to display the **Add/Modify Keywords** dialog box.
- From an open OLE document, select **Edit | Keywords**.
- From an open PDF document, select **Edit | Keywords** or click the **Keywords** button from the viewer control toolbar.

The **Add/Modify Keywords** dialog box is displayed.



From the **Add/Modify Keywords** dialog box, you can view or edit Keyword Values, depending on your assigned privileges and the Document Type of the document. Some Document Types are configured to disallow editing of Keyword Values, which renders a document's Keyword Values read-only.



Note: When editing keyword values that are displayed automatically on an opened document, it may be necessary to close and reopen the document to correctly auto-display those values.

Note: As a best practice, do not simultaneously open two instances of the **Add/Modify Keywords** dialog box or the **Re-Index Document** dialog box from a single document. The feature that OnBase uses to prevent other users from modifying the document's Keyword Values is activated by the first dialog box used to display the Keyword Values. If you close the first dialog box and keep the other open, then other users will be able to modify the document's Keyword Values.

Re-indexing

Re-indexing provides the ability to change Keyword Values, Document Date, and Document Type.

Note: Some Document Types are configured to require Keyword Values to be entered in order to create and/or retrieve documents. Required Keyword Values are displayed in red for these operations, which may include the following: Document Retrieval, importing, indexing, re-indexing, viewing or modifying Keyword Values, and scanning.

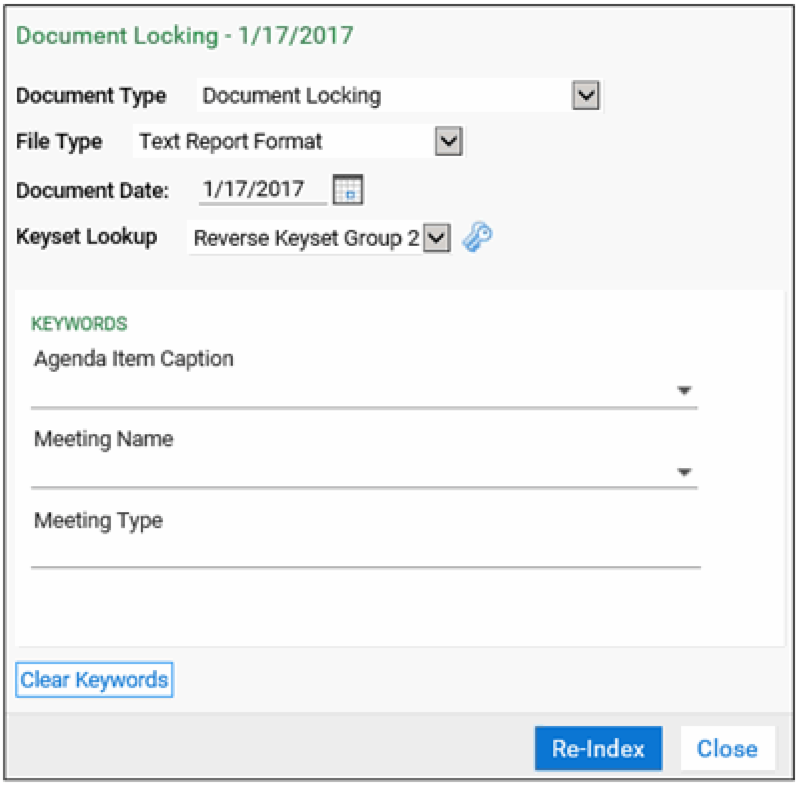
Re-Indexing Documents

Each document stored in OnBase has an associated Document Type, Document Date, and optional Keyword Types. This information is usually entered when a document is first imported into OnBase upon indexing.

You can change this associated information using the **Re-Index** feature.

Note: Ensure you understand the effects of re-indexing documents before proceeding. For more information, see Considerations for Re-Indexing Documents and Adding or Modifying Keyword Values on page 88.

1. Save any changes that you have made to a document before re-indexing.
2. From an open document or from a Document Search Results list, right-click and select **Re-Index** to open the **Re-Index Document** dialog box.



Note: If the original Document Type contains a Multi-Instance Keyword Type Group, the Document Type to which you want to re-index must contain the same Multi-Instance Keyword Type Group.

3. Select a Document Type from the **Document Type** drop-down list. All Document Types that you have rights to create are displayed.

   If the destination Document Type is configured to use Default Keyword Values, these Keyword Values are assigned to the document when the destination Document Type is selected from the **Document Type** drop-down list.

Note: If you select a different Document Type at any point during the re-indexing process, Keyword Values for common Keyword Types are retained. For example, if there is a value for the **City** Keyword Type, and you switch to a different Document Type that also contains the **City** Keyword Type, the original **City** Keyword Value is retained. This also applies to Keyword Types configured to use Default Keyword Values on the initial Document Type. These values are not replaced, even if the new Document Type uses a different set of Default Keyword Values.

Caution: If you are re-indexing a document associated with a Keyword Type Group (KTG) or Multi-Instance Keyword Type Group (MIKTG) filled by an AutoFill Keyword Set to another Document Type associated with the same KTG or MIKTG filled by an AutoFill Keyword Set, the AutoFill Keyword Set may unexpectedly re-populate secondary Keyword Values once the Document Type is changed. For more information, see Considerations for Re-Indexing Documents and Adding or Modifying Keyword Values on page 88.

4. Change the **File Type**, if needed.
   - Select another file format available from the **File Type** drop-down list.
   - You can easily change the file format by re-indexing the document instead of re-scanning or re-importing it to OnBase with the corrected file format.
   - File formats available for Re-Indexing depend on your system setup and the file format itself (certain file formats are only available through document processes or system functions.)

Caution: Contact your system administrator before selecting the **Image Rendered PDF** file format, as selecting this file format without the proper system specifications can cause unexpected behavior.

5. Change the **Document Date**, if needed. If a document date is not specified when the document is processed into OnBase, the **Document Date** is the same as the **Date Stored**.

   Click the **Calendar** icon next to the **Document Date** to select a date.
6. Depending on your system configuration, the **Initiate Workflow** check box may be displayed.

   If this check box is selected, a Workflow event is triggered if the creation of a document of this Document Type is configured to trigger a Workflow process. If this check box is not selected, a Workflow process is not triggered even if the creation of a document of this Document Type is configured to trigger a Workflow event.

7. Change Keyword Values as desired. You can use the **Tab** key to move to the next Keyword Value field. Note the following:
   - Some Keyword Types may be configured to be uppercase only, while others may be configured to appear in mixed or lowercase.
   - Depending on your system's configuration, certain Keyword Types may appear as read-only in the **Re-Index Document** dialog box to certain users. These Keyword Types may also be masked.
   - OnBase will not retain two sets of duplicate Keyword Values. For example, a Document Type contains two instances of the Keyword Type **First Name**, and one value is John and the other value is Sarah. If you change the value of Sarah to John, upon clicking **Re-Index**, OnBase will only retain one instance of John. If two Multi-Instance Keyword Type Groups share identical values, only one of those Multi-Instance Keyword Type Groups is retained.

Caution: After changing Keyword Values, click on any field in the dialog box before you click the Index button. This will trigger any AutoFill Keyword Sets that may have been affected by the Keyword Value change. See your system administrator for information regarding your system's AutoFill Keyword Set configuration. Click **Exit** to cancel changes if you get undesired results.

8. To add a new Keyword Type field of the same Keyword Type to the document, place the cursor inside the Keyword Type field that you want to duplicate and press **F6**. This adds a new Keyword Type field. Enter the new Keyword Value.

   If the Keyword Type that you duplicate belongs to a Keyword Type group, then it can only be duplicated if the group is a Multi-Instance Keyword Type Group. The entire group is duplicated, not just the selected Keyword Type.
9. Press **Clear Keywords** if you want to clear all existing Keyword Values and re-enter new values.
10. Click **Re-Index** to save your changes and re-index the document. Click **Close** to cancel changes.

Note: Review changes carefully before saving. Once re-indexed, documents can be retrieved using only the new Keyword Values.

Note: You can also change Keyword Values by right-clicking the document, selecting **Keywords**, and entering new Keyword Values in the appropriate fields. Re-indexing allows you to change the Document Type in addition to Keyword Values.

Keywords with Drop-Down Lists

Some Keyword Type fields have drop-down lists from which you can select Keyword Values. Select a Keyword Value from a drop-down list using any of the following methods:

- Click the drop-down button and scroll to the value you want to select.
- Place the cursor in the Keyword Type fields with the drop-down and press **F5** or the drop-down button to display available Keyword Values. Select a Keyword Value.

- Filter values available from the drop-down list by entering a word and/or character(s) that are part of the Keyword Value. When you press **F5** or the drop-down button, the list displays only values that match the entered characters. Scroll to your selection.

Note: The **F5** function is only available for Keyword Types that are configured to use a drop-down menu.

If two or more consecutive Keyword Types contain drop-down lists and are ordered in such a way as to show a hierarchical parent/child relationship, the Keyword Types may be part of a Cascading Data Set. Selecting a Keyword Value from the parent drop-down list filters the available Keyword Values from the subsequent child drop-down list.

Re-Indexing Document Revisions

You can re-index a document revision that is not the latest revision. For example, if a document has three revisions with the third being the most recent, you can re-index the first revision.

The revision process is the same as Re-Indexing Documents on page 84, only you would access documents from the Document Results Search List using the Revisions/Rendition option from the right-click menu. When the **Revisions/Renditions** dialog box is displayed, select the oldest revision and re-index as needed. All the options available during a regular re-indexing are available when re-indexing a revision, including the ability to change the file type.

To show all of the available values in a Cascading Data Set, hold the **Ctrl** key and click the drop-down arrow.

Considerations for Re-Indexing Documents and Adding or Modifying Keyword Values

Ensure you understand the effects of re-indexing documents and adding or modifying Keyword Values before proceeding with either task. Documents are re-indexed in the **Re-Index Document** dialog box. Keyword Values are added or modified in the **Add/Modify Keywords** dialog box.

Note: You cannot re-index a document or add or modify Keyword Values if the document has been locked by another user. See your system administrator for information regarding Document Lock Administration.

- **Automatically Change Secondary Keyword Values of an AutoFill Keyword Set**
  If an AutoFill Keyword Set is associated with the Document Type and you modify the Primary Keyword Value, all Secondary Keyword Values are automatically updated to reflect Keyword Values in the AutoFill Keyword Set when clicking **Re-Index**.

Note: You cannot re-index documents in the **Add/Modify Keywords** dialog box.

- **Keyword Values in Multi-Instance Keyword Type Groups**

  If the original Document Type contains a Multi-Instance Keyword Type Group, the Document Type to which you want to re-index must contain the same Multi-Instance Keyword Type Group in order to preserve the integrity of the data relationship.
- Re-indexing from a standard Keyword Type that has multiple Keyword Type Values to a Multi-Instance Keyword Type Group is not supported. It is not supported because it is not known which instance of the Multi-Instance Keyword Type Group to associate with each Keyword Type Value. If you must re-index from standard Keyword Types to a Multi-Instance Keyword Type Group, you must manually enter all of the Keyword Type Values appropriately in the Multi-Instance Keyword Type Group instances.
- **AutoFilled Keyword Values in Keyword Type Groups or Multi-Instance Keyword Type Groups**

  Re-indexing a document to another Document Type associated with the same Keyword Type Groups or Multi-Instance Keyword Type Groups causes any associated AutoFill Keyword Sets to re-populate the Keyword Values in the Keyword Type Group or Multi-Instance Keyword Group.

  If Secondary Keyword Type Values contained in a Keyword Type Group or Multi-Instance Keyword Type Group initially populated by an AutoFill Keyword Set are changed at any time before the new Document Type is selected, some or all of the modified Keyword Values are overwritten if an AutoFill Keyword Set is configured to populate any of those values in the Keyword Type Group or Multi-Instance Keyword Type Group on the new Document Type. The overwritten Keyword Values become permanent once re-indexing is complete.

  If the user closes the **Re-Index Document** dialog box before clicking the **Re-Index** button, or if the Secondary Keyword Values are changed in the **Re-Index Document** dialog box after the new Document Type is selected, the user is prompted to save.

Note: Changing the Primary Keyword Type Value prior to changing the Document Type will prevent the AutoFill Keyword Set from re-populating Secondary Keyword Type Values after a new Document Type is chosen, because the AutoFill Keyword Set is not triggered by the modified Primary Keyword Value, unless the modified Primary Keyword Value is also a Primary Keyword Value in an AutoFill Keyword Set associated with the new Document Type. Then, the modified Primary Keyword Value would cause the existing Secondary Keyword Values to be replaced by the associated Secondary Keyword Values.

Note: This only affects Keyword Type Groups or Multi-Instance Keyword Type Groups. Individual AutoFilled Keyword Types will retain any modified, individual, AutoFilled Keyword Values when a document is re-indexed, even if values from Keyword Type Groups or Multi-Instance Keyword Type Groups are overwritten on the same document.

- **Require Changes to Child Values in a Cascading Data Set**

  A Cascading Data Set is an indexing feature that defines parent/child relationships between drop-down Keyword Values available on a document or folder. Changing a parent Keyword Value in a Cascading Data Set will not update the child Keyword Values that depend on it. For example, suppose a document is indexed with a selected State and County, where the County Keyword Value is a child to the selected State Keyword Value. If you change the State Keyword Value, then the County will retain its original value and will not be updated to reflect the new State.
- **Trigger Auto-Foldering**

  If you re-index a document that is configured for auto-foldering, it will trigger an auto-foldering process.
- **Alter the contents of Dynamic folders**

  Because Dynamic Folders contain documents according to their Keyword Value, re-indexing a document or adding or modifying Keyword Values may dynamically move the document from its current folder to another folder.
- **Affect the appearance of your document**

  The appearance of an XML file format document may change if you add or modify the Keyword Values or re-index the document. Your system administrator determines whether the document's appearance is dependent on Keyword Values.
- **Affect Workflow**

  Keyword Values can affect Load Balancing and certain Workflow actions, such as **Set Related Document's Keyword Equal to This Document's Keyword**. See the **Workflow** module reference guide or help files for details.

Note: Re-indexing a document or adding or modifying Keyword Values may trigger different results depending upon the Workflow action.

- **Notes and Annotations**

  When re-indexing a revisable document with notes or annotations, the notes or annotations are not transferred to the next revision. The notes or annotations are only retained on the original document.

Retrieving Cross-Referenced Documents

If cross-references have been set up by your system administrator, related documents can be automatically retrieved from an open document. You retrieve cross-references in different ways depending on the type of document that is open (image, text, or electronic form). In most cases, your system administrator will instruct you on how to properly retrieve cross-referenced documents.

From Image or Text-Based Documents

Open the document, then double-click on the cross-reference double-click region. The location of the double-click region has been preset by your system administrator.

You can also open cross-references that are not configured with double-click regions. To do so, right-click on the document and select **Cross-References**.

In the HTML Web Client, you can also use the **Ctrl + W** keyboard shortcut. The **Cross Reference Results** window is displayed, listing any cross-referenced documents. Double-click a document to open it.

Note: This shortcut is not supported in Chrome or Firefox.

From E-Forms or HTML Documents

To initiate a cross-reference from an E-Form or HTML document, right-click on the document and select **Cross-References**.

In the HTML Web Client, you can also use the **Ctrl + W** keyboard shortcut.

Note: This shortcut is not supported in Chrome or Firefox.

If you are viewing an E-Form that has a cross-referencing button, you can also click this button to retrieve related documents.

From PDF or OLE Documents

To initiate a cross-reference from an open OLE document, such as a Word document, select **Document | Cross-References**.

To initiate a cross-reference from an open PDF document, do one of the following:

- Click the **Cross-References** button from the viewer control toolbar.
- Select **Document | Cross-References** from the menu above the viewer.

Note: Some Document Types do not support cross-references. See your system administrator for additional information.

Note: If there is more than one value for the referenced Keyword Type, all documents matching cross-reference criteria are retrieved.

Deleting Documents

You can delete documents from OnBase using the right-click options from a Document Search Results list or folder.

Note: This option is inactive if the document is locked by another user.

1. Select the document(s) you want to delete.
2. Right-click and select **Delete**.
3. Confirm the deletion when prompted. OnBase sends the selected document(s) to the Trash Can.

Note: Once documents have been sent to the Trash Can, they can only be recovered by the user who deleted them or by the system administrator.

Deleting an Open Document

Once a document is opened in the Document Viewer, a user can delete the document by performing the following:

Note: This option is inactive if the document is locked by another user.

1. From the open Document Viewer, right-click and select **Delete Document**.
2. Click **Yes** to confirm deletion.
3. The system then sends the document to the Trash Can.

Note: Once documents have been sent to the Trash Can, they can only be recovered by the user who deleted them or by the system administrator.

Navigate

Navigate is a feature available for multi-page text and image documents. You can access the **Navigate** options by right-clicking anywhere in the open document and selecting **Navigate**.

Option	Description
First Page **Last Page**	Selecting **First Page** or **Last Page** immediately displays the first or last page in the document, respectively.
Next Page **Previous Page**	Select **Next Page** or **Previous Page** to display subsequent or preceding pages in the document, respectively.
Go To Page	Select **Go To Page** and type the page number of the page you want to display. **Note:** You can also access the **Go To Page** dialog by double-clicking the **Page X of Y** section of the status bar.

Scale

The Scale feature provides options for viewing documents.

Option	Description
Actual Size	Displays the document without any viewer scaling (i.e., in the same aspect ratio in which it was acquired).
Fit Width	Scales the display of the current page in the viewer as adjusted per the maximum width of the page in the viewer.
Fit Height	Scales the display of the current page in the viewer as adjusted per the maximum height of the page in the viewer.
Fit in Window	Scales the display of the current page in the viewer according to the maximum viewer area.
Zoom In **Zoom Out**	Magnifies (**Zoom In**) or reduces (**Zoom Out**) the displayed area of the image in the viewer.
True Size	Displays the image at its original size (monitor DPI divided by image DPI when rendering at 100%). For example, if you scanned a 3" x 3" paper document into OnBase, the document displayed at True Size would occupy 3" x 3" of screen space. **Note:** Digital images, such as GIF and ICO files, can have undefined DPIs. For images whose DPIs are undefined, the **True Size** option uses a default image DPI of 200.

Process

There are several process options available when viewing documents.

1. From an open document, right-click and select **Process**.
2. Select one of the process options described in the following table:

Option	Description
Rotate All Pages 180	Rotates all pages of the document 180 degrees from their current positions. **Note:** This option is only available for image documents in the HTML Web Client.
Rotate Right	Rotates the image 90 degrees to the right.
Rotate Left	Rotates the image 90 degrees to the left.
Invert	Reverses the colors in the color palette. For example, black pixels become white and white pixels become black. A document is inverted only for the duration of its viewing session. When the document is closed, it resumes its default color properties. Selecting **Save Rotation** does not save the inverted document.
Flip Horizontally	Displays the document as a mirror image across the vertical axis.
Flip Vertically	Displays the document as a mirror image across the horizontal axis.

3. Right-click and select **Process | Save Rotation** to save the rotation. A confirmation message is displayed.

Note: Clicking **Save Rotation** saves each individual page of the document with any rotations that have been applied to it.

If you haven't selected the User Option **Rotate Auto-Save** in the OnBase Client or Web Client, and you don't select **Save Rotation**, the document retains the rotation for the current viewing session and resumes its default display properties upon closing. The document is displayed with its default properties the next time the document is opened.

Note: You can only save rotations on image documents.

Display

The Display feature can soften or increase the contrast of text and image documents at zoom levels of less than 100%. This feature is most noticeable on black-and-white images, making it helpful for reading scanned documents containing text that is too dark or too light.

The Display feature is set to **Scale to Gray** by default. To turn Scale to Gray off, do one of the following:

- Right-click the document and select **Display | Normal**.
- Click the  **Scale to Gray** button from the Viewer Control toolbar.

To turn Scale to Gray back on, do one of the following:

- Right-click the document and select **Display | Scale to Gray**.
- Click the **Scale to Gray** button again from the Viewer Control toolbar.

Send To Options

From an open document or from the Document Search Results list, right-click and choose **Send To** to display a sub-menu of document export options. The options available for any particular document depend on the Document Type, your network capabilities, which modules you are licensed to use, and the user rights granted to you by your system administrator.

Display Considerations

For documents sent outside of OnBase (**Send To | Clipboard**, **Mail Recipient**, or **File**):

- An overlay is displayed on the sent or saved document only if the overlay is displayed by default when you open the document in OnBase.
- Overlays are not displayed on documents sent with a content type of **Native Format**, **Original Format**, or **Text (.txt)**.
- Image document rotations are respected only if the rotation has been saved prior to sending.

From an Open Document

Note: Some documents, such as Microsoft Office documents, open using an external viewer. To access **Send To** options for a document that opens using an external viewer, right-click the document from a Document Search Results list.

The **Send To** right-click menu for an image or text document that is viewed within the Document Viewer may include the following options, depending on your system's configuration:

- **Send To | Clipboard**: Select to copy the document to the Windows clipboard.
- **Send To | Mail Recipient**: Select to email the document externally to a specified recipient.
- **Send To | Create New Document**: Select to create a new document from the current one, specifying Page Range, Document Type, Document Date, and Keyword Values as needed. Available for indexed documents only.

Note: Depending on your user rights, the new document may not contain masked Keyword Values from the original document. See the **Encrypted Alpha Keywords** module reference guide or help file for more information.

In the **Page range** field, type the pages (e.g., **1,5**) or range of pages (e.g., **1-5**) you want to copy to the new document. (This option is available for multi-page image documents only.)

- **Send To | File**: Select to save the document to a specified file.

Note: The ActiveX Web Client does not support the Windows protected mode. This could impact the location where you want to save files. See your system administrator for more information.

- **Send To | Envelope**: Select to include the document in an envelope.
- **Send To | Internal User**: Select to send the document to another user in OnBase.
- **Send To | Create DocPop Link**: Select to email a link to the document that can be accessed by recipients via DocPop.
- **Send To | Copy DocPopLink**: Select to copy a DocPop URL to the clipboard. You can browse to a new window and paste the link into the subject line to open the document in DocPop.
- **Send To | Create DocPop Link to Page**: Select to email a link to the document that will open the document to the page displayed in the viewer. The link allows the document to be accessed by recipients via DocPop. This option is only available for text and image documents.

From the Document Search Results List

The **Send To** right-click menu for a selected document in the Document Search Results list may include the following options, depending on your system's configuration:

- **Send To | Mail Recipient**: Select to email the document externally to a specified recipient.
- **Send To | File**: Select to save the document to a specified file.

Note: The ActiveX Web Client does not support the Windows protected mode. This could impact the location where you want to save files. See your system administrator for more information.

- **Send To | Create New Document**: Select to create a new document from the current one, specifying Page Range, Document Type, Document Date, and Keyword Values as needed. Available for indexed documents only.

Note: Depending on your user rights, the new document may not contain masked Keyword Values from the original document. See the **Encrypted Alpha Keywords** module reference guide or help file for more information.

In the **Page range** field, type the pages (e.g., **1,5**) or range of pages (e.g., **1-5**) you want to copy to the new document. (This option is available for multi-page image documents only.)

- **Send To | Internal User**: Select to send the document to another user in OnBase.
- **Send To | Envelope**: Select to include the selected document(s) in an envelope.
- **Send To | Folder**: Select to add the selected document(s) to a static folder.
- **Send To | Copy DocPopLink**: Select to copy a DocPop URL to the clipboard. You can browse to a new window and paste the link into the subject line to open the document in DocPop.

- **Send To | Create DocPop Link**: Select to email a link to the document that can be accessed by recipients via DocPop.

Note: For more information on DocPop, see the **DocPop** module reference guide.

Note: Depending on the file type of the selected document, not all of the following content types may be available. In addition, the names of some of the following options may differ between the ActiveX and HTML Web Client.

Option	Description
Original Format **or** **Native Format**	Saves or sends the selected documents in the format in which they are stored in OnBase (for example, OLE documents such as Word documents and PDFs, uncompressed text documents, most image documents). Overlays are not applied. **Note:** For multi-page image documents, this option saves the document as a single-file TIFF file. **Note:** This content type is only available if the selected documents can be successfully saved or mailed in their original formats.
Rendered Format **or** **AutoDetect Format**	Saves or sends each of the selected documents in the format that most represents a viewable document outside of OnBase. For example, an E-Form or Virtual E-Form is saved as an HTML file.
PDF (.pdf)	Saves or sends the selected documents as PDF files. For multiple documents selected, each document is converted to a separate PDF. Available for documents with any of the following file formats: • Image file format • PCL • PCL with overlay • PDF • Text report format • Text report format with overlay • XML with style sheet

Option	Description
Encrypted PDF (.pdf)	Sends the selected documents as encrypted PDF files. Each selected document is encrypted as a separate PDF. Upon choosing this content type, you will be prompted to enter a password, which the recipient will need to enter upon opening the attachment. Available for documents with any of the following file formats: • Image file format • PCL • PCL with overlay • Text report format • Text report format with overlay
Image (.tif)	Saves or sends the selected documents as TIFF files. Available for documents with any of the following file formats: • Image file format • PCL • PCL with overlay • Text report format • Text report format with overlay **Note:** If a text document is configured to display an overlay by default, then the text document will be saved as an image with the overlay applied.
Text (.txt)	Saves or sends the selected documents in plain text format. Available for documents with a text report format. Overlays are not applied.
HTML (.htm;.html)	Saves or sends the selected documents in .htm format. Available for documents using HTML and MHTML (for example, E-Forms, V-Forms).
ZIP (.zip)	Saves or sends the selected documents as a ZIP file. Available for any document or group of documents.

Emailing Documents

There are two ways to email documents that you have retrieved:

- From the Document Search Results list, you can email one or more documents.
- From an open document, you can send the open document to an email recipient.

Note: If you are sending an email through the Web Client using Microsoft Outlook, ensure that Outlook is open before attempting to send your email message.

Either method attaches a copy of the document(s) to an email message with the attachment name(s) included in the body text, which you then can edit and send.

Depending on your system's configuration, the file name for the attachment may be based on the document's Auto-Name, the document's Print Title, or it may be an automatically generated attachment ID. If an attachment's name is not unique, for example, because you are sending two files with the same Auto-Name, then OnBase makes the name unique by appending **_** (underscore) followed by a number.

Certain characters are not allowed in file names. If these characters appear in the document's Auto-Name, they are substituted with other characters that are allowed. Substitutions are as follows:

<table>
<tr><th>Auto-Name Character</th><th>Replaced With</th></tr>
<tr><td>\ and /</td><td>-</td></tr>
<tr><td>:</td><td>;</td></tr>
<tr><td>*</td><td>+</td></tr>
<tr><td>?</td><td>!</td></tr>
<tr><td><</td><td>[</td></tr>
<tr><td>></td><td>]</td></tr>
<tr><td>“</td><td>'</td></tr>
<tr><td>|</td><td>!</td></tr>
</table>

Emailing a Document

Emailing a document in the Web Client requires either a web email service (such as Google Gmail or Microsoft Office 365) or a functional, MAPI-compliant email client. Commonly used MAPI email clients are Microsoft Outlook and Novell GroupWise. Client mail programs that deviate from strict MAPI compliance may not function as expected.

You must also have user rights to send a document to an external mail system. User rights are managed by your system administrator.

Note the following considerations for emailing a document from the Web Client:

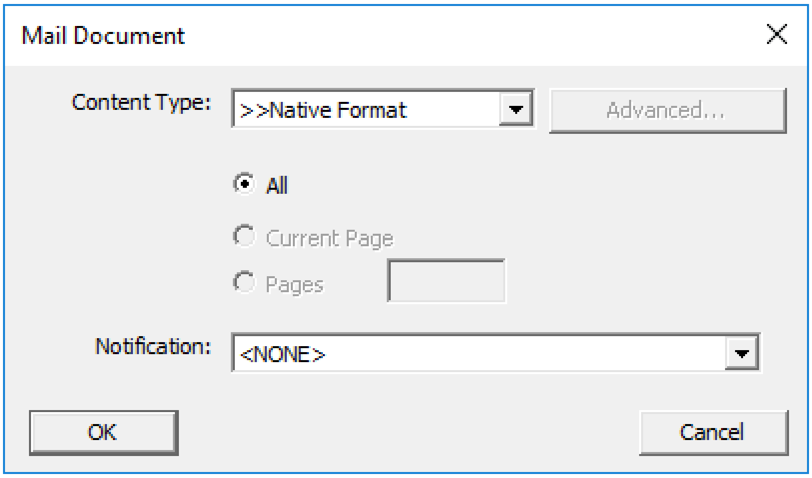
- If your default mail client is IBM Lotus Notes, emails composed in OnBase are auto-saved in the IBM Lotus Notes drafts folder. When emails are discarded in OnBase before being sent, they are not removed from the IBM Lotus Notes drafts folder.
- Email signatures cannot be automatically added for certain mail clients when creating a new email from the Web Client. To use email signatures in the following situations, compose the message and manually add the signature in the native email client:
  - IBM Lotus Notes
  - Microsoft Outlook, when rich text is selected as the default message format
  - The OnBase **Mail Message** dialog box

To email a document in the Web Client:

1. Perform one of the following actions:
   - From the Document Search Results list, select the document(s) that you want to email, right-click, and select **Send To | Mail Recipient**.
   - From an open text or image document, right-click and select **Send To | Mail Recipient**.
   - From an open PDF or OLE document in the ActiveX Web Client, select **Document | Send To | Mail Recipient** in the Document Viewer toolbar.

   The **Mail Document** dialog box is displayed.

Note: Depending on your configured email service, the **Mail Document** dialog box may look slightly different than the following illustration, but it contains the same options.



2. Use the **Content Type** drop-down list to select a file format for the document. The client automatically selects the content type based on the document selected (for example, **Image (.tif)** format is the default content type for PCL, DJDE, AFP, and all other image file formats).

Note: Depending on the file type of the selected document, not all of the following content types may be available. In addition, the names of some of the following options may differ between the ActiveX and HTML Web Client.

Option	Description
Original Format **or** **Native Format**	Saves or sends the selected documents in the format in which they are stored in OnBase (for example, OLE documents such as Word documents and PDFs, uncompressed text documents, most image documents). Overlays are not applied. **Note:** For multi-page image documents, this option saves the document as a single-file TIFF file. **Note:** This content type is only available if the selected documents can be successfully saved or mailed in their original formats.
Rendered Format **or** **AutoDetect Format**	Saves or sends each of the selected documents in the format that most represents a viewable document outside of OnBase. For example, an E-Form or Virtual E-Form is saved as an HTML file.
PDF (.pdf)	Saves or sends the selected documents as PDF files. For multiple documents selected, each document is converted to a separate PDF. Available for documents with any of the following file formats: • Image file format • PCL • PCL with overlay • PDF • Text report format • Text report format with overlay • XML with style sheet
Encrypted PDF (.pdf)	Sends the selected documents as encrypted PDF files. Each selected document is encrypted as a separate PDF. Upon choosing this content type, you will be prompted to enter a password, which the recipient will need to enter upon opening the attachment. Available for documents with any of the following file formats: • Image file format • PCL • PCL with overlay • Text report format • Text report format with overlay

Option	Description
Image (.tif)	Saves or sends the selected documents as TIFF files. Available for documents with any of the following file formats: • Image file format • PCL • PCL with overlay • Text report format • Text report format with overlay **Note:** If a text document is configured to display an overlay by default, then the text document will be saved as an image with the overlay applied.
Text (.txt)	Saves or sends the selected documents in plain text format. Available for documents with a text report format. Overlays are not applied.
HTML (.htm;.html)	Saves or sends the selected documents in .htm format. Available for documents using HTML and MHTML (for example, E-Forms, V-Forms).
ZIP (.zip)	Saves or sends the selected documents as a ZIP file. Available for any document or group of documents.

3. If you select **PDF (.pdf)** or **Image (.tif)**, the following additional advanced options are available. Depending on your configured email service, you may need to click the **Advanced** button to display the options in the **Advanced Options** dialog box. Select the relevant options.

Option	Description
Annotation and/or Note Icon On Document	The document is emailed with any annotations and note icons displayed on the document. If you move a note before emailing the document, the note is displayed in its last saved location. Note locations are saved when a document is closed. **Note:** When printed, annotations and icons are the same size as they appear on the document when it is scaled to 100%.

Option	Description
Note Text On Document	The document is emailed with the title and text of any notes in that note's location on the document, along with the name of the user that created the note and the date and time it was created. If this option is selected with **Annotation and/or Note Icon On Document**, the text is displayed below the icon. If you move a note before emailing the document, the note is displayed in its last saved location. Note locations are saved when a document is closed. **Note:** This option is not respected by Overlapped Text annotations.

4. Select one of the following page options:

Button	Description
All	Sends all pages. This is the only available option for documents sent using the **Send To | Mail Recipient** option from the Document Search Results list.
Current Page	Sends only the current page.
Pages	Sends a range of pages. Page ranges can be entered as a compound selection such 1-5,12,22,31-100,200. Selecting a page range in the **Image (.tif)** format results in a multi-page TIFF file.

5. Depending on your system's configuration, the **Notification** or **Email Template** drop-down list may be displayed. The email template you select will change the default text in the subject and body of your message.

Note: If you select multiple documents and select **Send To | Mail Recipient**, any email template you select will only apply to the first document selected.

Note: If the email template you select contains a Keyword Type that does not exist on the document, that Keyword Value will be replaced with a blank space.

6. Click **OK** or **Send**. An email message is displayed with the selected document pages attached.

Note: You may be required to log into your email system at this time, if you are not already logged in.

7. Enter the recipients of the message.
8. Type the body of the message.
9. Send the message.

Attachment Display Considerations

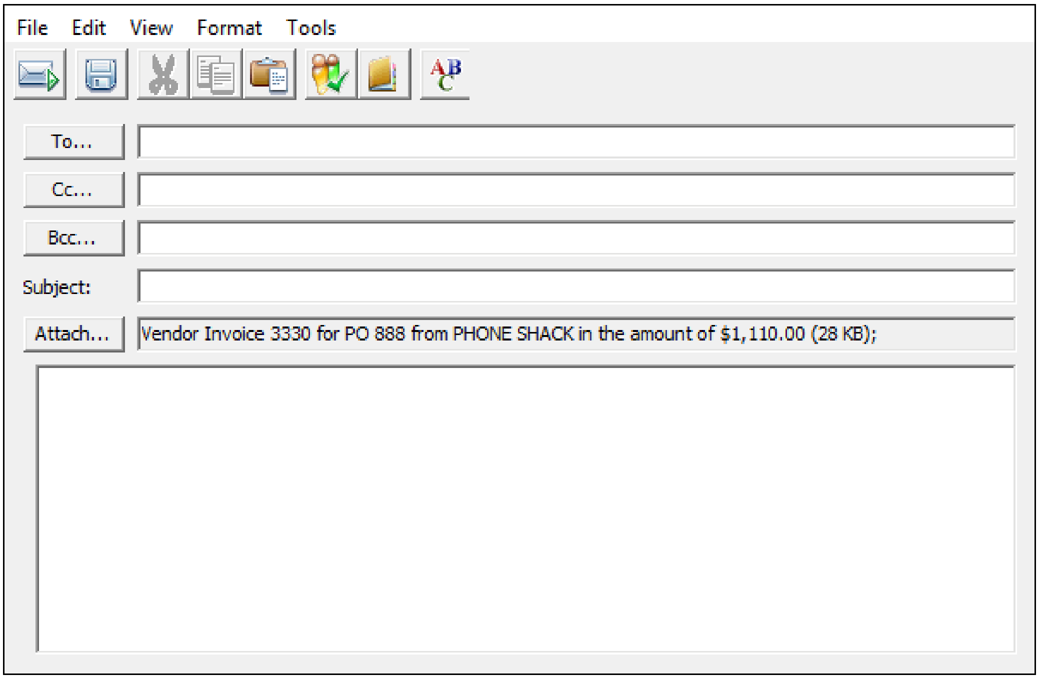
If the document you are sending has an overlay, the overlay is displayed on the attachment only if the overlay is displayed by default when you open the document in OnBase. Overlays are not displayed on attachments sent with a content type of **Native Format**, **Original Format**, or **Text (.txt)**.

Rotating an image without saving the rotation before sending it to a mail recipient will not save the newest rotation.

Using the Mail Message Dialog Box

The OnBase **Mail Message** dialog box is only displayed when using Novell GroupWise.

Note: SMTP is not supported in the Unity Client or Web Client.



To display the **Bcc** field, select **View | BCC**.

The **Format** menu displays message formats available for your Native Mail System. To make the selected format the default format for future messages, select **Set as default**.

The buttons in the **Mail Message** toolbar are described in the following table.

Tip: To change the way the toolbar is displayed, click **View** and select **Large Toolbar** to display large toolbar buttons or **Small Toolbar** to display small toolbar buttons.

Button	Description
	**Send** - Click to send the mail message. This feature is also available by selecting **File | Send**.
	**Save** - Click to save the mail message. This feature is also available by selecting **File | Save**.
	**Cut** - Click to cut highlighted text in the message field. This feature is also available by selecting **Edit | Cut**.
	**Copy** - Click to copy highlighted text in the message field to the clipboard. This feature is also available by selecting **Edit | Copy**.
	**Paste** - Click to paste text in the message field that was copied to the clipboard. This feature is also available by selecting **Edit | Paste**.
	**Check Names** - Click to verify names and email addresses entered in the **To** field from your Address Book. This feature is also available by selecting **Tools | Check Names**.
	**Address Book** - Click to open the Address Book and add email addresses to the **Message Recipients** text boxes by selecting the Name, then clicking the **To**, **Cc**, or **Bcc** buttons. To remove names, double-click on the name in the Message Recipients list and it will return to its original location. This feature is also available by selecting **Tools | Address Book**. **Note:** If you are using a large Novell GroupWise address book (more than 15,000 entries), all recipient names may not be available in the **Select Names** dialog box.
	**Spell Check** - Click to spell check text entered in the message field. This feature is also available by selecting **Tools | Spell Check**. **Note:** Spell check is only supported for workstations with Microsoft Word installed.

Checking Names and Addresses

Clicking the **Check Names** button resolves the recipient's name to the address book by looking for contacts configured as either First Name-Last Name or Last Name-First Name (including middle initial, if applicable). The following rules apply:

Note: Novell GroupWise users need to use a wildcard character, *, when resolving an incomplete name.

- When address book has multiple cases where a name being resolved can be both a First Name or Last Name (e.g., James), the **Check Names** dialog box prompts the user to select the appropriate recipient.
- When you type an entire recipient name as <First Name Middle Initial Last Name>, you must use the correct punctuation for the middle initial (e.g., Betty A. Jones) for the name to be resolved to the address book.
- When you type a recipient name as <Last Name First Name Middle Initial>, you must use the correct punctuation; a comma must follow the Last Name. When a Middle Initial is included, you must follow it with a period (e.g., Jones, Betty A.).

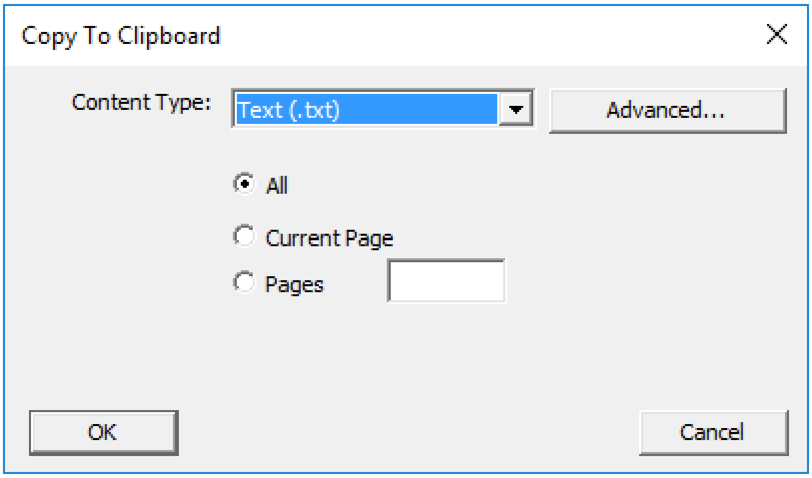
Send To | Clipboard - Copying Documents to the Clipboard

If you have sufficient user rights, you can copy the document that you are viewing to the Windows clipboard.

Note: This function is only available in the ActiveX Web Client.

To copy a document to the clipboard:

1. From an open text or image document, right-click and select **Send To | Clipboard**. The **Copy to Clipboard** dialog box is displayed.



2. Select a content type from the drop-down list.

Option	Description
Image (.tif)	Copies the selected documents as TIFF files. Available for documents with any of the following file formats: • Image file format • PCL • PCL with overlay • Text report format • Text report format with overlay
Text (.tif)	Copies the selected documents in plain text format. Available for documents with a text report format. Overlays are not applied.

3. Click **OK**.

Send To | Create New Document - Creating New Documents from Existing Documents

If you have **Create New** and **Save As** user rights, you can create new documents from existing text and image documents stored in OnBase.

Depending on Document Type privileges, the **Create New Document** option may or may not be visible or enabled. Note the following:

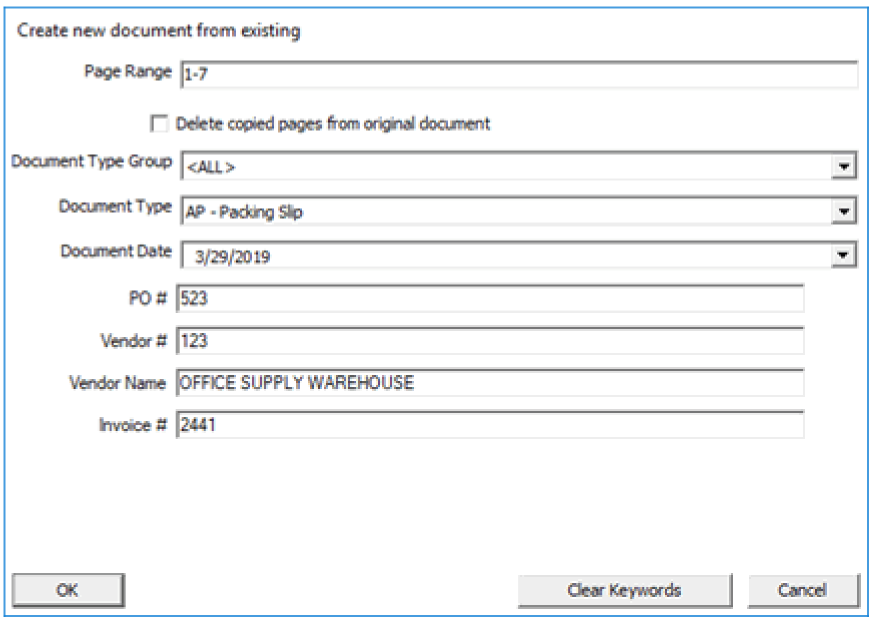
- If any Document Type in the **Search Results list** has **Copy to Clipboard/Save As** and **Create New** privileges, the **Create New Document** menu option is visible.
- If an individually selected document type in the **Search Results list** has **Copy to Clipboard/Save As** privileges, the **Create New Document** menu option is enabled.
- If any Document Type in the **Document Viewer** has **Create New** privileges, the **Create New Document** menu option is visible.
- If the current document in the **Document Viewer** screen has **Copy to Clipboard/Save As** privileges, the **Create New Document** menu option is enabled.
- If the document is locked by another user, the **Create New Document** menu option is disabled.

Create New Documents Using ActiveX

To create a new document using ActiveX controls:

1. From an open text or image document or from the Document Search Results list, right-click and select **Send To | Create New Document**. The **Create new document from existing** dialog box is displayed.

Note: If the document is currently open in another browser session, a message is displayed indicating that a new document cannot be created because the document is locked by another user.



2. In the **Page Range** field, enter the pages or page range you want to include in the new document.

Note: The page range option is available for multi-page image documents only.

A specified page range is required when creating a new document. You can type complex ranges, such as **1-2,5,8-11**.

Tip: The new document will contain the pages you enter in the precise order that they were entered. For example, if you enter **2-5,1** as your page range, the first page of the original document will be the last page of the new document.

3. To delete the specified pages from the original document, select **Delete copied pages from original document**.

Note: The **Delete copied pages from original document** option is not available if the original document is a single page. Additionally, in the ActiveX Web Client, this option is only respected if the Global Client Settings for your OnBase solution have also been configured to delete source pages by default. See your system administrator for more information.

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4. If the **Create as revision of original document** option is available, select the option to create the document as a revision to the original source document. When this option is selected, the Document Type and Keywords are reset to the source document and cannot be modified. This option is available if all of the following are true:
   - The OnBase solution is licensed for EDM Services.
   - The source Document Type is revisable.
   - You have the proper privileges to create revisions.

Note: A revision of a document cannot be created while the document is locked.

---

5. Index the new document by specifying the **Document Type Group**, **Document Type**, **Document Date**, and any **Keyword Values**.

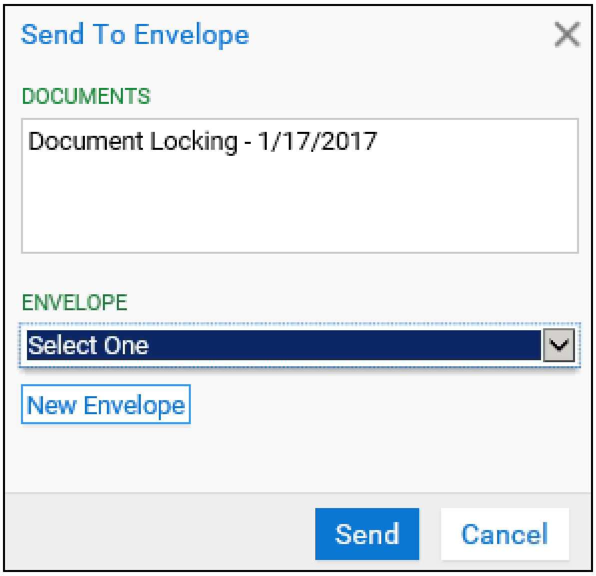
   Depending on your user rights, the new document may not contain masked Keyword Values from the original document. See the **Encrypted Alpha Keywords** documentation for more information.
6. Depending on your system's configuration and licensing, the **Add To Workflow** option may be available. Select it to add this new document to a Workflow life cycle. This option is only available when licensed for Workflow and the Document Type is part of an existing life cycle.
7. Click **OK**.

   If you chose to delete the copied pages, you are prompted to confirm the deletion. Click **Yes** to confirm, or click **No** to cancel the deletion and return to the **Create new document from existing** dialog box.

Adding Documents to an Envelope

If you have the appropriate user rights, you can send one or more documents to an envelope for easy access. Documents in an envelope do not have to have any elements in common.

1. From an open document, or from one or more documents selected from a Document Search Results List, right-click and select **Send To | Envelope**. The **Send To Envelope** dialog box is displayed.



   The document or documents you selected are shown in the **Documents** list.
2. Select an envelope from the **Envelope** drop-down list.
3. To create a new envelope, click **New Envelope**. Enter the name for the new envelope and click **OK**. This creates the new envelope and returns you to the **Send To Envelope** dialog box, with the new envelope selected. If you typed the name of an existing envelope, no new envelope is created, and the document will be added to the existing envelope.
4. Click **Send**. The document is added to the selected envelope.

Saving Documents to Files

If you have sufficient privileges, you can save all or part of the document you are viewing as a disk file that you can access on your computer system or through a network connection.

You can save documents to files in the following ways:

- Text and image documents can be saved from either an open document in the Document Viewer or a Document Search Results list.
- OLE and PDF documents viewed in the OLE document viewer can be saved from a Document Search Results list.
- PDF documents viewed in the Web Client PDF viewer can be saved from either an open document in the Document Viewer or a Document Search Results list.
- If the OLE or PDF document opens in its native application (such as Microsoft Word), you may be able to save the document externally by selecting **File | Save As** from the application.

Note: The ActiveX Web Client does not support the Windows protected mode. This could impact the location where you want to save files. See your system administrator for more information.

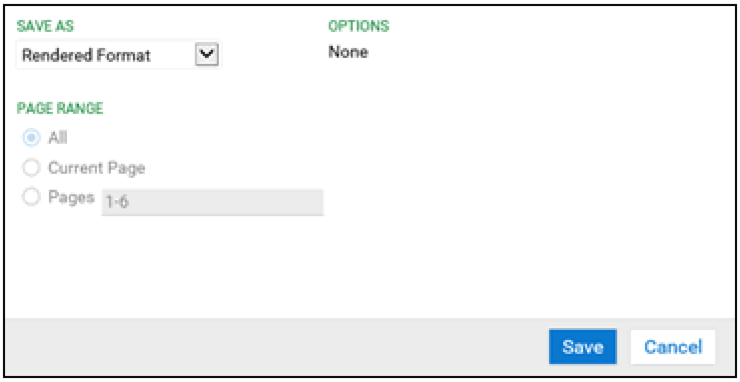
The following steps describe how to save one or more documents to a file:

1. Do one of the following:
    - From the Document Search Results list, select the documents you want to save, right-click, and select **Send To | File**.

      Saving multiple documents requires downloading the documents to a single .zip file. For information on saving multiple documents from the Document Search Results List, see Saving Multiple Documents to a Zip File on page 119.
    - From an open text or image document, right-click and select **Send To | File**, or click the **Save to File** toolbar button.

Note: If you rotate an image without saving the rotation before sending it to file, the rotation will not be saved to the file.

The **Save to File** dialog box is displayed.



2. Select a content type from the drop-down list.

   The client automatically selects a content type based on the document selected (for example, **Image (.tif)** is the default content type for PCL, DJDE, AFP, and all other image file formats). The last used content type may also be preselected.

Note: Depending on the file type of the selected document, not all of the following content types may be available. In addition, the names of some of the following options may differ between the ActiveX and HTML Web Client.

Option	Description
Original Format **or** **Native Format**	Saves or sends the selected documents in the format in which they are stored in OnBase (for example, OLE documents such as Word documents and PDFs, uncompressed text documents, most image documents). Overlays are not applied. **Note:** For multi-page image documents, this option saves the document as a single-file TIFF file. **Note:** This content type is only available if the selected documents can be successfully saved or mailed in their original formats.
Rendered Format **or** **AutoDetect Format**	Saves or sends each of the selected documents in the format that most represents a viewable document outside of OnBase. For example, an E-Form or Virtual E-Form is saved as an HTML file.
PDF (.pdf)	Saves or sends the selected documents as PDF files. For multiple documents selected, each document is converted to a separate PDF. Available for documents with any of the following file formats: • Image file format • PCL • PCL with overlay • PDF • Text report format • Text report format with overlay • XML with style sheet

Option	Description
Encrypted PDF (.pdf)	Sends the selected documents as encrypted PDF files. Each selected document is encrypted as a separate PDF. Upon choosing this content type, you will be prompted to enter a password, which the recipient will need to enter upon opening the attachment. Available for documents with any of the following file formats: • Image file format • PCL • PCL with overlay • Text report format • Text report format with overlay
Image (.tif)	Saves or sends the selected documents as TIFF files. Available for documents with any of the following file formats: • Image file format • PCL • PCL with overlay • Text report format • Text report format with overlay **Note:** If a text document is configured to display an overlay by default, then the text document will be saved as an image with the overlay applied.
Text (.txt)	Saves or sends the selected documents in plain text format. Available for documents with a text report format. Overlays are not applied.
HTML (.htm;.html)	Saves or sends the selected documents in .htm format. Available for documents using HTML and MHTML (for example, E-Forms, V-Forms).
ZIP (.zip)	Saves or sends the selected documents as a ZIP file. Available for any document or group of documents.

3. If you selected a content type of **Image (.tif)**, the following options are displayed (in the ActiveX Web Client, click the **Advanced** button to display these options):

Option	Description
Annotation and/or Note Icon On Document	Saves the document with any annotations and note icons displayed on the document. If you move a note before saving the document, the note is displayed in its last saved location. Note locations are saved when a document is closed. **Note:** When saved, annotations and icons are the same size as they appear on the document when it is scaled to 100%.
Note Text On Document	Saves the document with the title and text of any notes in that note's location on the document, along with the name of the user that created the note and the date and time it was created. If this option is selected with **Annotation and/or Note Icon On Document**, the text is displayed below the icon. If you move a note before saving the document, the note is displayed in its last saved location. Note locations are saved when a document is closed. **Note:** This option is not respected by Overlapped Text annotations.

4. If you are saving a PDF document from OnBase, the following option is displayed:

Option	Description
Export Notes with Document	Saves the document and converts any OnBase notes and annotations on the document into Adobe Acrobat comments and drawing markups.

5. If you selected a content type of **Encrypted PDF (.pdf)**, you must enter a password to encrypt the file.
6. Select the document pages you want to save.

Option	Description
All	Saves all pages. This is the only available option for documents saved using the **Send To | File** option from the Document Search Results list.
Current Page	Saves only the current page.
Pages	Saves a range of pages. Page ranges can be entered as a compound selection such 1-5,12,22,31-100,200. Selecting a page range in the **Image (.tif)** format results in a multi-page TIFF file.

7. Click **OK**. The **Save As** dialog box is displayed.
8. Modify the file's name and location as needed. See File Naming Conventions on page 119 for more information.
9. Click **Save** to save the file. Certain characters will be substituted in the file name upon saving.

File Naming Conventions

When you save a document to file, the default **File Name** is based on the document's Auto-Name. For example, if the document name is **Checking Statement Acct#1020** and you save it as a **.tif** file, the default file name is **Checking Statement Acct#1020.tif**

Note: The Auto-Name may be truncated to keep the file name below 256 characters. A Microsoft limitation restricts the full path to a file to a maximum of 260 characters. For more information, see http://msdn.microsoft.com/en-us/library/aa365247%28VS.85%29.aspx.

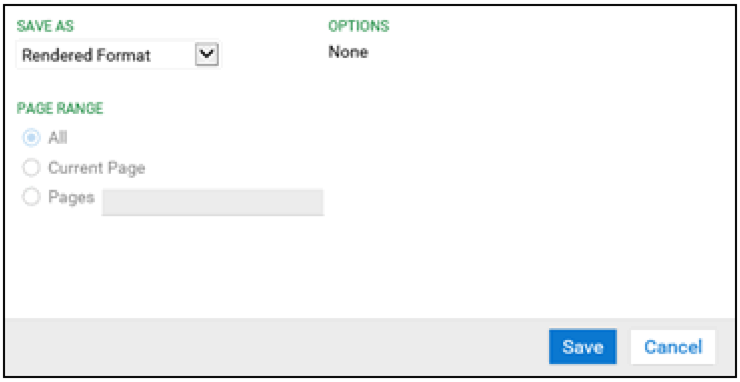
If the default **Save As** location already contains a file with a matching file name, OnBase automatically appends the new file's name with an underscore and an incremental number. For example, if **Checking Statement Acct#1020** already exists in the default **Save As** location, OnBase will name the new file **Checking Statement Acct#1020_1.tif**. See Character Substitutions on page 120 for more information.

Saving Multiple Documents to a Zip File

You can select multiple documents in the Document Search Results list and then save them into a single .zip file. You can also specify the content type in which the documents are saved within the .zip file.

To save multiple documents to a .zip file:

1. Select the documents you want to save from the Document Search Results list.
2. Right-click and select **Send To | File**. The **Save to File** dialog box is displayed.



3. Select a content type from the drop-down list to specify how the selected documents are saved within the .zip file. See Saving Documents to Files on page 115 for more information on saving documents to a specific content type.

Option	Description
Rendered Format	Saves each document in the format that most represents a viewable document outside of OnBase. For example, an E-Form or Virtual E-Form is saved as an HTML file.
PDF (.pdf)	Saves all documents as PDF files.
Image (.tif)	Saves all documents as TIFF files.

4. Click **Save**. Depending on your browser, you may be prompted to either open or save the .zip file. Click **Save** to save the .zip file.

Character Substitutions

Certain characters will be substituted in the file name upon saving. Substitutions are as follows:

Auto-Name Character	Replaced With
\ and /	-
:	;
*****	+
?	!
<	[
>	]
“	'
|	!

Note: The HTML Web Client uses the same character substitutions with the following exceptions: **" ' : ;** , and spaces are substituted with **_**.

Printing Documents

The **Print** option is available if your computer system has access to a printer, and you have the appropriate user rights.

1. To print a document, perform one of the following actions:
   - From an open document or from one or more selected documents in the Document Search Results list, right-click and select **Print**.
   - From an open document, click the **Print** toolbar button.

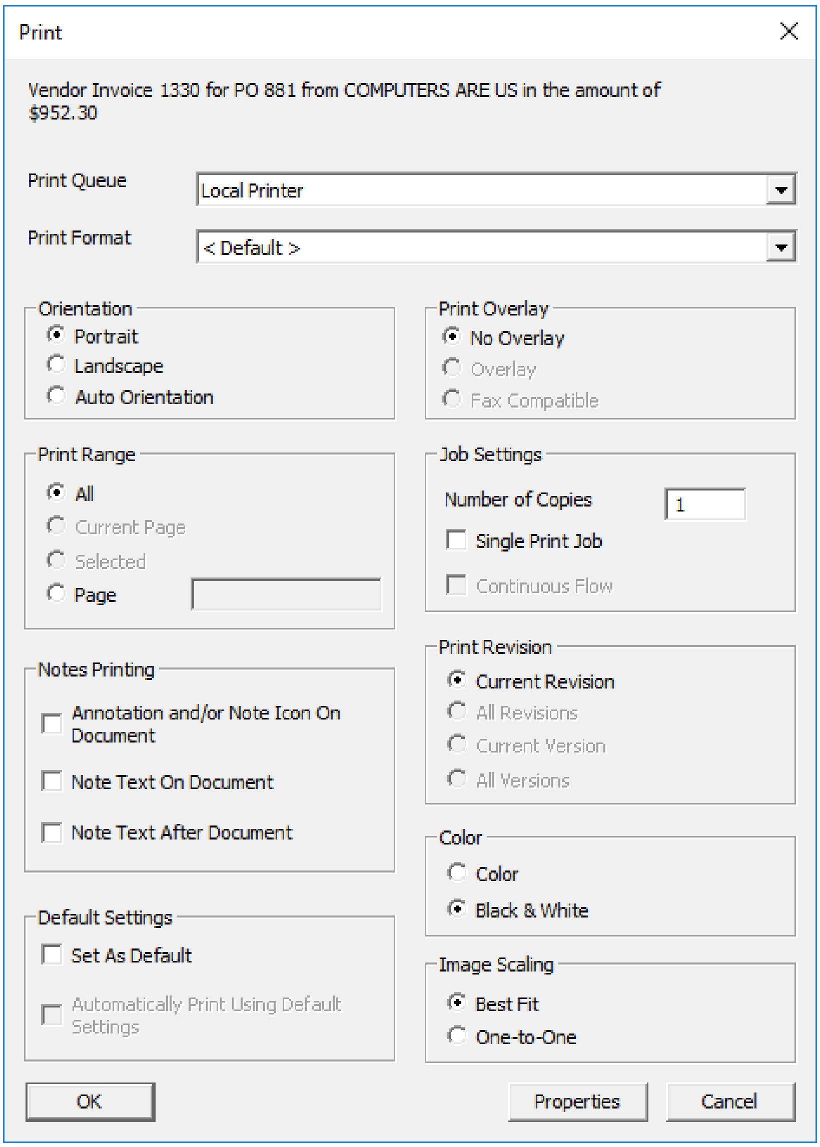
- From an open OLE document, select **Document | Print**.

  If the option to print an OLE document is unavailable, you may still be able to send the document to a server print queue.

Note: Depending on your system's configuration, OLE documents may use your printer's default settings or the OLE document's default settings instead of the settings selected in the OnBase **Print** dialog box. If your document is not printing as expected, change your printer's settings or your document's settings to print the document as desired.

- If the document is open in an external application, select the print option from the external application. (For example, select **File | Print** from the application.)

The **Print** dialog box is displayed.



2. Select one of the available printers and the appropriate print options. For a description of print options available from the OnBase **Print** dialog box, see the following table.

Note: Depending on your configuration, the **Print** dialog box may default to print all pages or the current page of the document.

Option	Description
Print Queue	Select the desired network print queue (mapped to the desired printer) from the **Print Queue** drop-down list. Print queues manage the manner in which documents are printed by defining the method for generating the print request, as well as the type of printer that will be used to print the document when it is sent to that queue. Available Print Queues are defined by your system administrator. **Note:** To send a document to a Print Queue in the HTML Web Client, see Sending Documents to Print Queues in the HTML Web Client on page 106.
Print Format	The **Print Format** drop-down list displays configured print formats, which determine the appearance of the selected documents. When you select a print format, its settings are used as defaults in the print dialog. The print format default is the print format associated with the Document Type of the first document selected for printing. If a batch is selected or no print format is associated with the Document Type, the setting is **<Default>**. To override the print format defaults, change the settings in the print dialog box. When printing multiple items with varying document types, select **<Use Doc Type Default>** from the **Print Format** drop-down list. This selection prints each document using the print format configured for its Document Type. **Note:** The **<Use Doc Type Default>** option is not available when printing Document Types that do not have a default print format.
Orientation	**Portrait**: Prints the top of the page on the shortest side of the paper. **Landscape**: Prints the top of the page on the longest side of the paper. **Auto Orientation**: Prints the page according to its dimensions. For example, if the height of the page is greater than the width, **Portrait** is used. If the width of the page is greater than the height, **Landscape** is used. For multi-page images, the orientation is determined on a page-by-page basis. **Note:** These options do not apply to Microsoft Word documents and are not available for PDF documents. **Note:** This setting is not respected when printing XML documents. XML documents are printed using the default orientation setting of the printer.

Option	Description
Print Overlay	**No Overlay:** Prints the document without the associated overlay. **Overlay**: Prints the document with the associated overlay. The overlay that is printed may be different than the overlay that is displayed, depending on the configuration of the Document Type. **Fax Compatible**: Select this option if you are printing to a fax machine. OnBase arranges the overlay image in a way that faxing software can properly interpret. The overlay that is faxed may be different than the overlay that is displayed or printed, depending on the configuration of the Document Type. **Note:** Printing overlays is not supported when running OnBase as a print server.
Print Range	**All**: Prints all pages of the document(s). **Note:** The **All** Print Range option is the only option available when printing PDF documents. **Current Page:** Prints the current page. **Selected**: (Currently not available) **Page**: Prints a range of pages in the document. **Note:** If you enter a complex range into this field, the pages are printed in the order entered. For example, if you entered **5, 1-3, 9,** then page 5 of the document would be printed first, followed by pages 1, 2, 3, and 9. You cannot enter complex ranges when printing to a server print queue. **Note:** The **Print Range** setting is not supported for printing E-Forms in the ActiveX Web Client.

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Job Settings</td><td> Number of Copies: Enter the number of copies to print.
Note: When printing several copies of a multi-page document to XPS or PDF Creator, some print jobs may combine.
Single Print Job: If multiple documents are highlighted for a print request, Single Print Job instructs OnBase to combine the selected documents into a single Windows print job, rather than printing each separately.
Note: The Single Print Job option only applies to documents that are natively rendered. Documents such as E-Forms and OLE documents cannot use the Single Print Job option.
Continuous Flow: If the multiple documents selected for a Single Print Job are formatted for a multi-image layout on the page, the Continuous Flow option tells OnBase to continue filling the page with images from the next document, filling the existing multi-page format before proceeding to the next page.
Example: If you select three two-page documents for printing and choose a print format configured to print two rows and two columns, your output would be three pages, each of which is a single document.
If you select Continuous Flow, your output would be two pages, the first page having two documents and the second having the remaining third document.
Continuous Flow cannot be used to control the format of PCL documents in a multi-image layout. </td></tr>
<tr><td>Notes Printing</td><td> Annotation and/or Note Icon On Document: Prints the note annotation (graphical representation of a note) on the document.
Note Text On Document: Prints the title and text of any notes in that note’s location on the document, the name of the user that created the note and the date and time it was created, and the Print Title configured for the selected Document Type. This option is not respected for HTML documents, OLE documents, or PDF documents. This option is not respected by Overlapped Text annotations.
Note Text After Document: Prints the title and text of any notes, the name of the user that created the note and the date and time it was created, and the Print Title configured for the selected Document Type on a separate page.
Note: Depending on your system’s configuration, some note icons or text may not be printed no matter what Notes Printing options you have selected. See your system administrator for more information.
Note: The Annotation and/or Note Icon On Document and Note Text On Document options do not apply to E-Forms, HTML forms, or XML documents. </td></tr>
</table>

Option	Description
Print Revision	These options are only available if your database is licensed for EDM Services. For more information, see the **EDM Services** documentation. **Note:** The **Current Revision** option is automatically selected.
Color	**Color:** Select to print in color. **Black & White:** Select to print in black and white. **Note:** These options do not apply to Microsoft Word documents and are not available for PDF documents. **Note:** Depending on your installed print drivers, these options may not be respected with certain printers.
Default Settings	**Set as Default:** Select this option to use the settings that you have selected in this dialog box as the default print settings. The settings will remain selected as default on that workstation for all document types until the check box is deselected. **Automatically Print Using Default Settings:** This setting is reserved for future use.
Image Scaling	**Best Fit:** Prints image to fit, with scaling as necessary. **One-to-One:** Prints image actual size/scale (1:1 in terms of inches).

Note: Select the **Properties** button to configure options specific to the selected printer. See the documentation for your printer for more information on these options. The **Properties** button is not available for PDF documents.

3. Click **OK**.

Note: Not all methods are available from all Document Types.

E-Forms not Printing Correctly

Some users may encounter the following issue: when printing an E-Form from a results list (such as a Document Search Results list), the E-Form is printed without any data (i.e., only a blank shell of the E-Form is printed). This behavior is caused by the way Internet Explorer handles security. Users are still able to print E-Forms by opening the E-Form and printing from the Document Viewer.

Print or Copy Sections of a Document Using Rubber Band

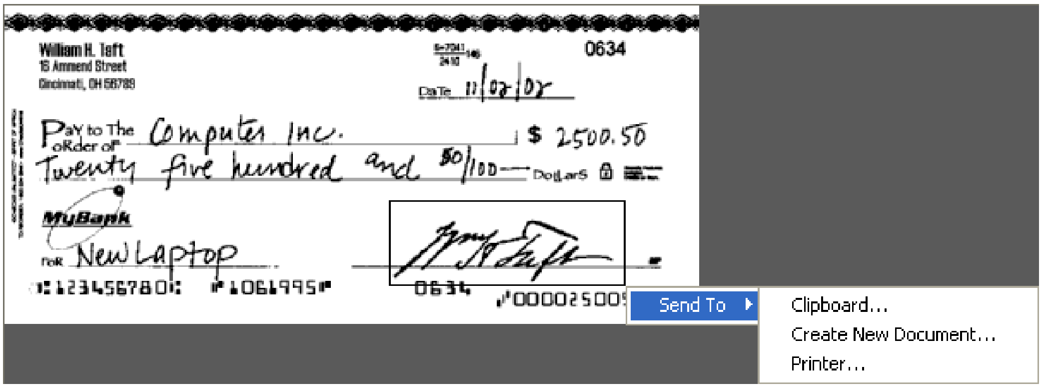
You can print or copy an area of a text or image document using the Rubber Band feature. Copied content can be pasted into another program or be used to create a new document in OnBase. To successfully print or copy selected areas of a text document with an overlay applied, the overlay must be removed.

Note: The Rubber Band feature can be used to create annotations if **Draw Annotation On Rubberband** is selected in your Viewer Options. When this option is selected, you can use the Rubber Band feature to create the annotation currently selected in the Annotations toolbar without clicking the **Toggle Annotation** button.

1. Press and hold the **Ctrl** key on the keyboard.
2. With the **Ctrl** key still pressed, click and drag your mouse pointer over the area of the document that you want to copy or print.

Tip: Click and drag your pointer without pressing **Ctrl** to zoom in on the selected area.

3. When you have defined the area to copy or print, release the mouse button. A **Send To** menu displays several options.



4. Select one of the following options:

Option	Description
Clipboard	Copies the selected content to the clipboard. A confirmation message tells you whether text or image content has been copied. If the document is a text document, the selected text is copied. If the document is an image document, the selected area of the image is copied. You can then paste the copied content into an appropriate program.

Option	Description
Create New Document	Available for image documents only, this option creates a new OnBase document from the selected area. After you select this option, the **Create new document from existing** dialog box is displayed. Index the new document by specifying the Document Type Group, Document Type, Document Date, and any Keyword Values. • Click **OK** to create the new document. • Click **Clear** to remove the currently displayed values. • Click **Cancel** to exit without creating a new document.
Printer	Prints the selected area. If you select this option, the **Print** dialog is displayed. Select the desired settings and click **OK**. The **Confirm** dialog box displays the following message: **Do you want the zoom region resized to fit the printed page width?** • Select **Yes** to resize the selected area to the fit the width of the printed page. • Select **No** to print the selected area in its true size. • Select **Cancel** to exit without printing.

Sending Documents to Print Queues in the HTML Web Client

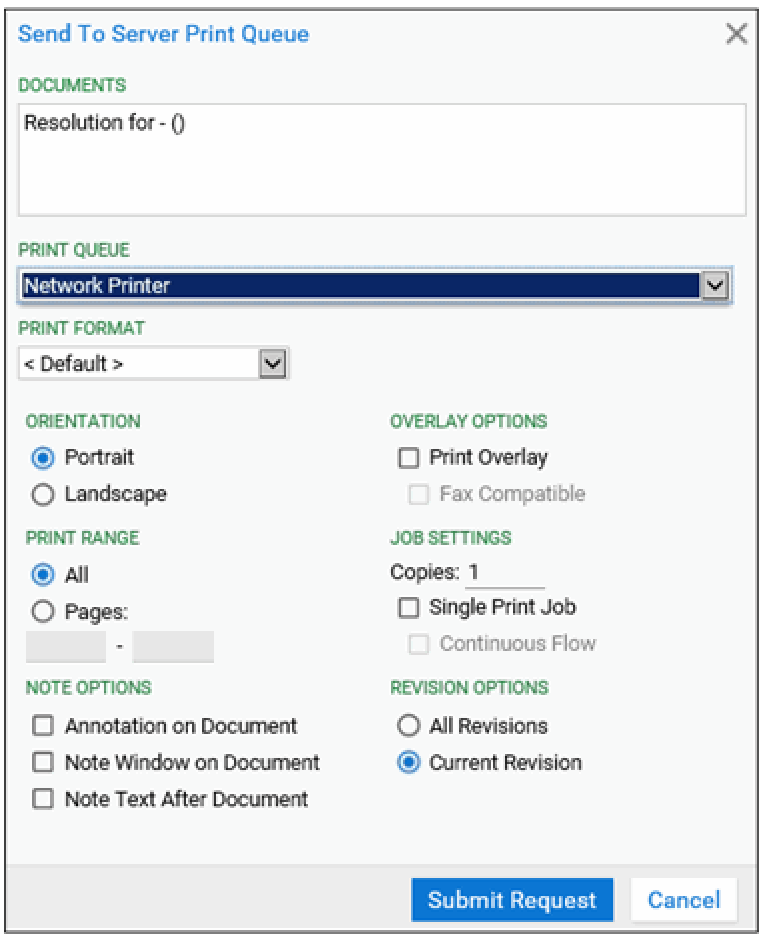
If you have sufficient privileges, you can send a document to a server print queue.

Note the following considerations:

- This option is only available in the HTML Web Client.
- This option does not support printing Unity Forms.
- This option does not support two-sided printing.

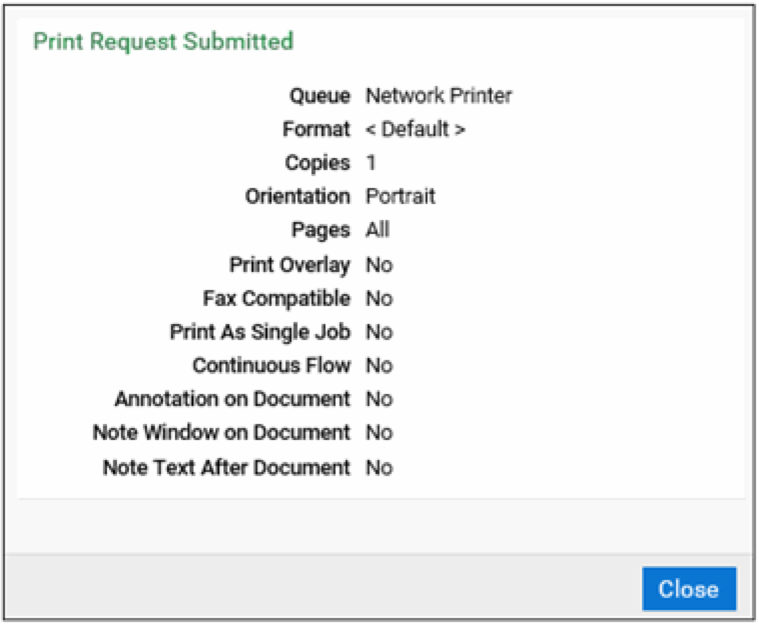
To send documents to a server print queue:

1. Right-click the document from the Document Search Results list or Document Viewer and select **Send To | Server Print Queue**. The **Send To Server Print Queue** dialog box is displayed.



2. Edit the options as needed. See the following table for information.

3. Click **Submit Request**. The **Print Request Submitted** dialog box is displayed listing all the options you selected.



4. Click **Close** to close the dialog box.

Print Queue Dialog Box Options

The following table describes the options in the **Print Queue** dialog box.

Option	Description
Print Queue	Select the desired network print queue (mapped to the desired printer) from the **Print Queue** drop-down list. Print queues manage the manner in which documents are printed by defining the method for generating the print request, as well as the type of printer that will be used to print the document when it is sent to that queue. Available Print Queues are defined by your system administrator.
Print Format	The **Print Format:** drop-down list displays configured print formats, which determine the appearance of the selected documents. When you select a print format, its settings are used as defaults in the print dialog. The print format default is the print format associated with the document type of the first document selected for printing. If a batch is selected or no print format is associated with the Document Type, the setting is **<Default>**. To override the print format defaults, change the settings in the print dialog box.
Orientation	**Portrait**: Prints the top of the page on the shortest side of the paper. **Landscape**: Prints the top of the page on the longest side of the paper.

Option	Description
Print Range	**All**: Prints all pages of the document(s). **Note:** The **All** Print Range option is the only option available when printing PDF documents. **Selected**: (Currently not available) **Pages**: Prints a range of pages in the document.
Note Options	**Annotation On Document**: Prints the note annotation (graphical representation of a note) on the document. **Note Window On Document**: Prints the note text on the document. **Note Text After Document**: Prints the text of all document notes on a separate page.
Overlay Options/Print Overlay	**Print Overlay**: Prints the document with the associated overlay. The overlay that is printed may be different than the overlay that is displayed, depending on the configuration of the Document Type. **Fax Compatible**: Select this option if you are printing to a fax machine. OnBase arranges the overlay image in a way that faxing software can properly interpret. The overlay that is faxed may be different than the overlay that is displayed or printed, depending on the configuration of the Document Type.
Job Settings	**Copies**: Enter the number of copies to print. **Single Print Job**: If multiple documents are highlighted for a print request, Single Print Job instructs OnBase to combine the selected documents into a single Windows print job, rather than printing each separately. **Note:** The **Single Print Job** option only applies to documents that are natively rendered. Documents such as E-Forms and OLE documents cannot use the **Single Print Job** option. **Continuous Flow**: If the multiple documents selected for a Single Print Job are formatted for a multi-image layout on the page, the **Continuous Flow** option tells OnBase to continue filling the page with images from the next document, filling the existing multi-page format before proceeding to the next page. **Example**: If you select three two-page documents for printing and choose a print format configured to print two rows and two columns, your output would be three pages, each of which is a single document. If you select **Continuous Flow**, your output would be two pages, the first page having two documents and the second having the remaining third document. Continuous Flow cannot be used to control the format of PCL documents in a multi-image layout.
Revision Options/Print Revision	**All Revisions**: Prints all document revisions that you have permission to view. **Current Revision**: Prints the most current document revision that you have permission to view.

Toolbars in the Document Viewer

The Document Viewer can be configured to display any combination of the following toolbars. Depending on your system configuration, one or more of these toolbars may be disabled or turned off by default.

- The **Viewer Control** toolbar offers buttons for navigating within the current document, resizing and reorienting its pages, printing the document, and accessing document options. The **Viewer Control** toolbar is almost always displayed. This toolbar's default position is immediately above the document display area.
- The **Text Search** toolbar provides buttons for searching the document for a specified text string. The **Text Search** toolbar is typically available for documents with a text report format. This toolbar's default position is the top of the document display area, above all other toolbars.
- The **Column/Row Locking** toolbar enables you to lock columns and rows in place so that they will still be viewable when you scroll through the document. The **Column/Row Locking** toolbar is typically available for documents with a text report format. This toolbar's default position is under the **Text Search** toolbar.
- The **Pages** toolbar controls the display of thumbnails of the document pages. This toolbar's default position is to the right of the document display area.
- The **Notes** toolbar offers access to notes attached to a document. The **Notes** toolbar is available only if the document has any notes. The toolbar is displayed along the bottom of the Document Viewer.
- The **Annotations** toolbar allows you to create annotations and redactions on documents. This toolbar's default position is at the top of the document, immediately above the **Viewer Control** toolbar.

Tip: Drag toolbars to different positions to customize the interface. To move a toolbar, position your pointer over the vertical bar on the left side of the toolbar. Then, click and drag the toolbar to its new position.

Showing or Hiding Toolbars

You can set the default behavior of toolbars to show or hide.

1. Right-click on the header or the footer of the Document Viewer or the **Pages** toolbar.
2. Select **Toolbars** to display the toolbars that are available for the current document.
   - Viewer Control
   - Text Search
   - Column/Row Locking
   - Pages
   - Annotations
   - Notes List
   - Notes
3. Select an option to toggle the toolbar to **Show** (checked) or **Hide** (not checked).

Note: Some toolbars are Document Type-specific. For example, **Text Search** and **Column/Row Locking** are only available for text-based documents.

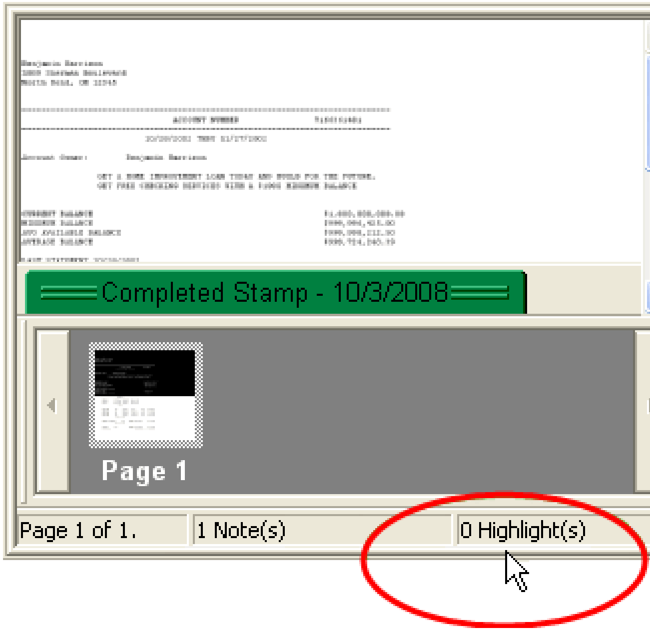
Auto-Hide Toolbars

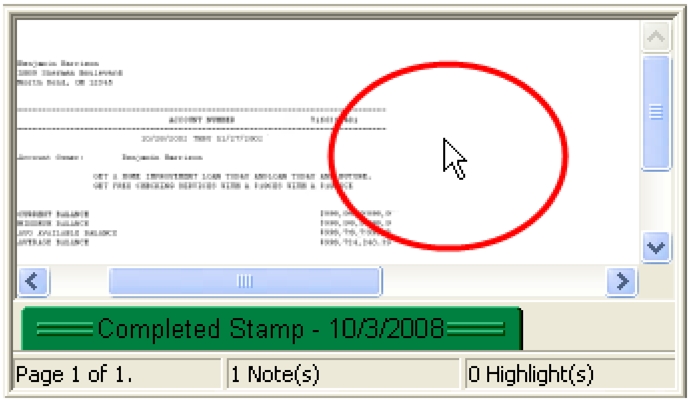
Auto-Hide provides the ability to hide toolbars until you position your pointer over their display area.

1. Ensure the toolbar you wish to Auto-Hide is set to show.
2. Right-click on the toolbar to toggle Auto-Hide on or off for the toolbars that display in that area:
   - Right-click in the **Viewer** header to toggle Auto-Hide on or off for the toolbars that display in the header (Viewer Control, Annotations, Text Search and Column/Row Locking, Notes List).
   - Right-click in the **Notes** toolbar to toggle Auto-Hide on or off for the **Notes** toolbar.
   - Right-click in the **Pages** toolbar to toggle Auto-Hide on or off for the **Pages** toolbar.

3. When Auto-Hide is active, toolbars are displayed when you place the pointer over their display areas.

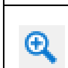
   In the example below, notice the **Pages** toolbar is displayed when the pointer is placed over the **Pages** toolbar display area. The **Pages** toolbar is hidden when the pointer is not over the **Pages** toolbar display area.

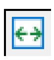
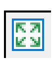
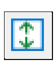
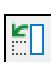
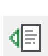
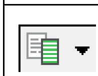




Viewer Control Toolbar

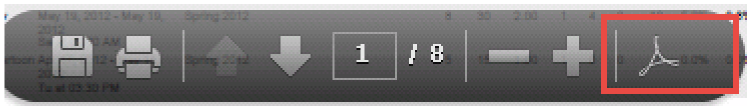
The Viewer Control toolbar allows you to view the document more efficiently. Use the buttons to navigate within the document, resize and reorient the page, and print.

Button	Description
	**Overlay** applies an overlay to the document, if an overlay is present.
	**Save to File** displays the **Save to File** dialog box, allowing you to save documents outside of OnBase if you have appropriate user rights. **Note:** The ActiveX Web Client does not support the Windows protected mode. This could impact the location where you want to save files. See your system administrator for more information.
	**Print** displays the **Print** dialog box, if you have user rights to print the document.
	**Add Note** displays the **Add Note** dialog box, which displays note types you can add to the document.
	**View Note** displays the **View Note** dialog box, which displays a list of all notes on the document.
	**First Page** displays the first page of the document.
	**Previous Page** displays the preceding page of a multi-page document.
	**Next Page** displays the following page of a multi-page document.
	**Last Page** displays the last page of the document.
	Enter a page number in the **Go To Page** field to jump directly to a specific page.
	**Zoom In** magnifies the view of a document, reducing the portion that is visible. Every zoom increases magnification by one third.
	**Zoom Out** reduces the magnification of a document, increasing the portion that is visible. Every zoom reduces magnification by one quarter.

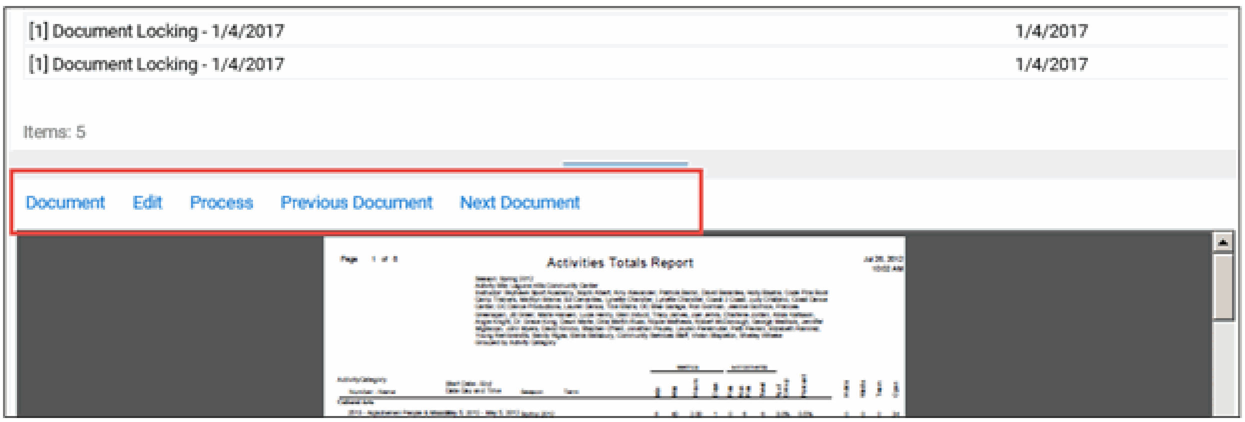
Button	Description
	**Sizing** options allow you to select a standard sizing option. Select a specific percentage of reduction or magnification (25%, 50%, 75%, 100%, or 200%), Fit Width, Fit Height, Fit Window, or True Size. Also displays the current magnification percentage whenever the **Scale | Zoom In** or the **Scale | Zoom Out** options are chosen in the right-click menu for the open document.
	**Actual Size** displays the document in its actual size (as it is stored in OnBase). Clicking this button sets the magnification to 100%. **Note:** This zoom level differs from True Size, which takes the monitor's and image's DPI into account when displaying the image.
	**Fit Width** resizes the document page so that its width is the same as the width of the document display area.
	**Fit Window** resizes the document page so that the entire page is displayed in the document display area.
	**Fit Height** resizes the document page so that its height is the same as the height of the document display area.
	**Rotate Left** rotates the document 90 degrees counterclockwise.
	**Rotate Right** rotates the document 90 degrees clockwise.
	**Options** enables you to set viewer options.
	**Scale to Gray** softens the contrast of text and image documents at zoom levels of less than 100%. This feature is most noticeable on black-and-white images, making it helpful for reading scanned documents containing text that is too dark or too light.
	**Magnify** turns the cursor into a magnifying glass that you can place over an area in a document. The area is displayed at 200% zoom in a separate view window next to the magnifying glass.
	**Previous Document** displays the previous document in a Document Results list
	**Next Document** displays the next document in a Document Results list.
	**Show Alternate Rendition** is available only for documents that are allowed to have multiple renditions. This button allows you to view a different rendition of a document when the document has multiple renditions. To view a list of the available renditions, click the black arrow. Select the rendition you want to view from this list.

PDF Viewer Toolbar

PDF documents are displayed in their native application, using the toolbar that comes with Adobe Reader. When you open a PDF document, you must select the Show Adobe Reader Toolbar icon.



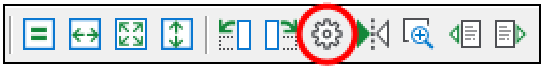
To navigate within the viewer, the following toolbar is displayed:



This toolbar provides you with many of the existing right-click menu options that are available for image and text documents, since the right-click menu is not accessible when viewing these documents.

Options Button - OnBase Viewer Options

The **Options** button in the Viewer Control toolbar allows you to set the default behavior for the user interface of the Document Viewer.



Use the **Options** button to set the following items:

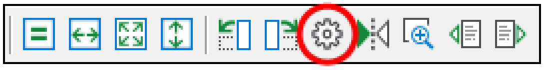
- Thumbnail size
- Thumbnail zoom behavior
- Auto-scroll preferences
- Whether to show icons on a document page for notes and annotations
- Rubberband behavior
- Zoom region preferences
- Blank page display preferences
- Connection timeout preferences

Note: When using the HTML document viewer, not all of these options may be available.

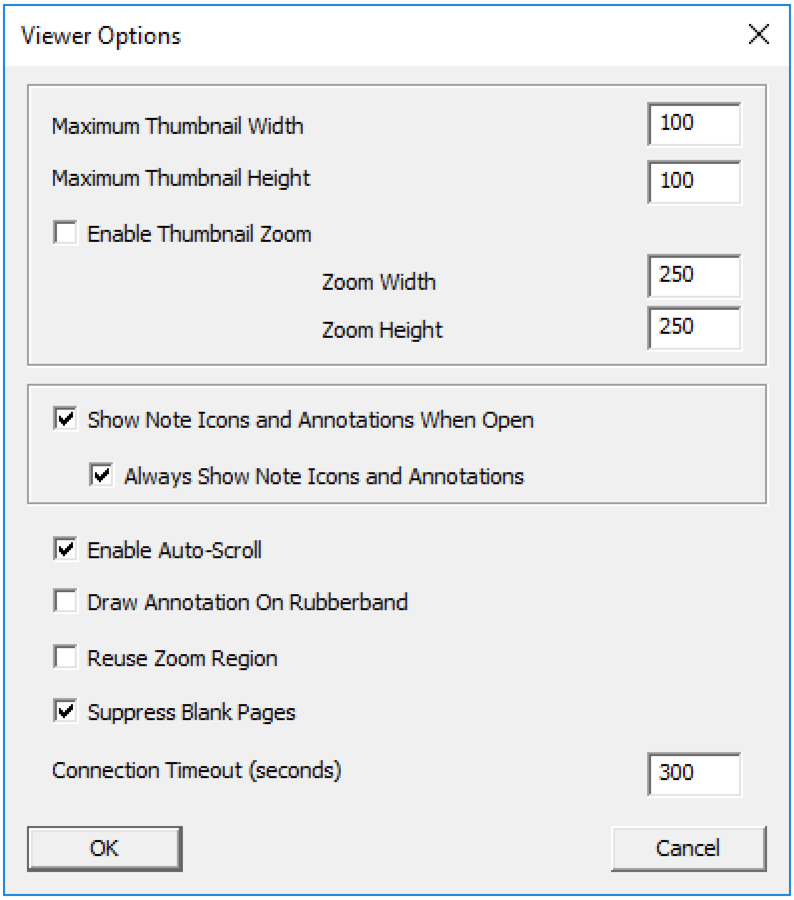
Changing Thumbnail Size

The size of thumbnails is determined by their maximum pixel width and maximum pixel height. Because the height/width aspect ratio can vary substantially from document to document, OnBase automatically chooses either the maximum height or the maximum width, depending on which one allows the other to be displayed in full, and then calculates the other dimension.

1. Click the **Options** button in the **Viewer Control** toolbar.

   The **Viewer Options** dialog box is displayed.

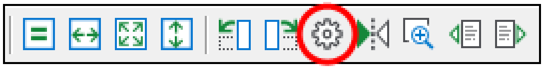
2. In the **Maximum Thumbnail Width** field, type the number of pixels that defines the maximum width for thumbnails. For example, the default setting is **100**, which means that no thumbnail in the **Pages** toolbar will ever be wider than 100 pixels. You can specify any width from 32 pixels through 160 pixels.

3. In the **Maximum Thumbnail Height** field, type the number of pixels that defines the maximum height for thumbnails. For example, the default setting is **100**, which means that no thumbnail in the **Pages** toolbar will ever be taller than 100 pixels. You can specify any height from 32 pixels through 160 pixels.
4. Click **OK** to save your changes and close the page. OnBase immediately resizes the thumbnails in the **Pages** toolbar.

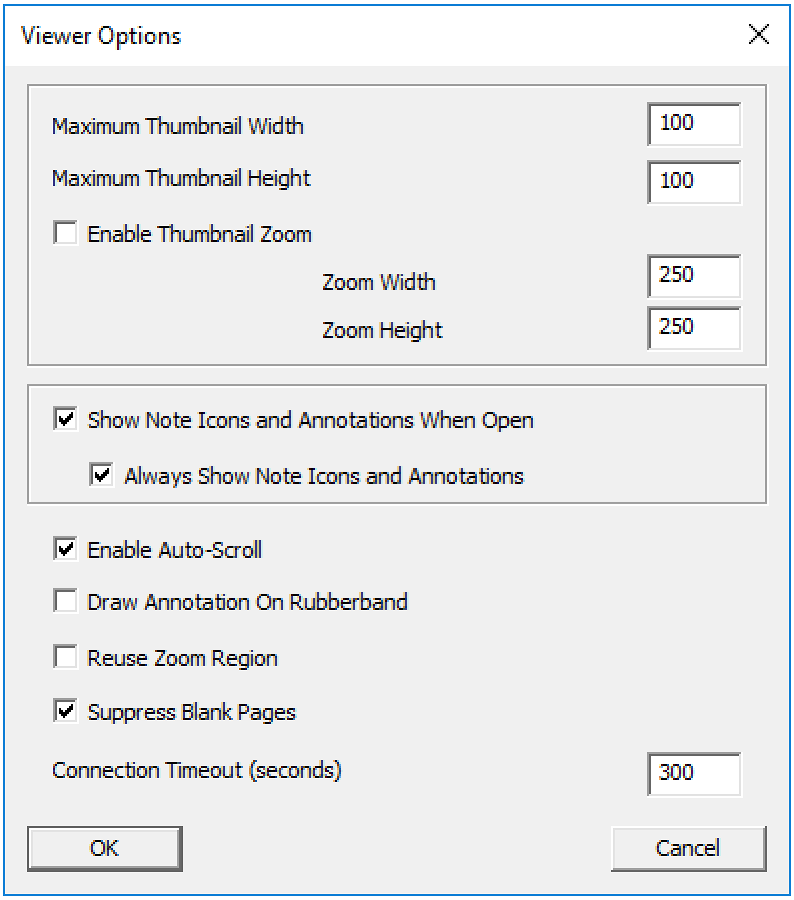
Change Zoomed Thumbnail Size

When a thumbnail is zoomed, its width and height are expanded to a specified percentage of the original thumbnail width and height. To maintain the original aspect ratio, the zoom percentage should be the same for both width and height. If the percentages are different, OnBase automatically compensates by selecting the dimension that has the lower percentage, and adjusting the other dimension to preserve the original aspect ratio.

1. Click the **Options** button in the **Viewer Control** toolbar.



The **Viewer Options** dialog box is displayed.

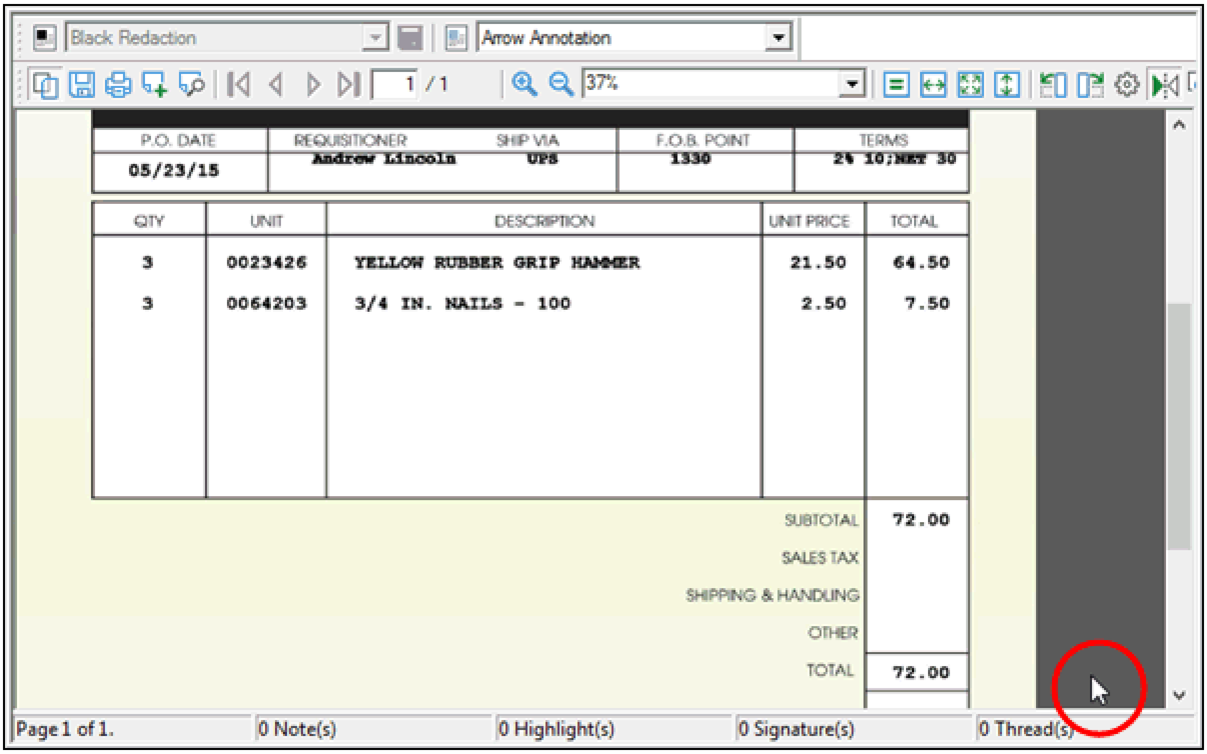


2. Select the **Enable Thumbnail Zoom** check box if you want thumbnails to be magnified to the specified dimensions whenever you place your pointer over them. Clear the check box if you want thumbnails to remain the same size.
3. In the **Zoom Width** field, type the maximum width in pixels of the zoomed thumbnail. You can specify any value between 32 and 1024.
4. In the **Zoom Height** field, type the maximum height in pixels of the zoomed thumbnail. You can specify any value between 32 and 1024.
5. Click **OK** to save your changes and close the page. OnBase immediately changes the dimensions for zoomed thumbnails. The next time you hover your mouse pointer over a thumbnail, it will be zoomed to the new size.

Enable Auto-Scroll

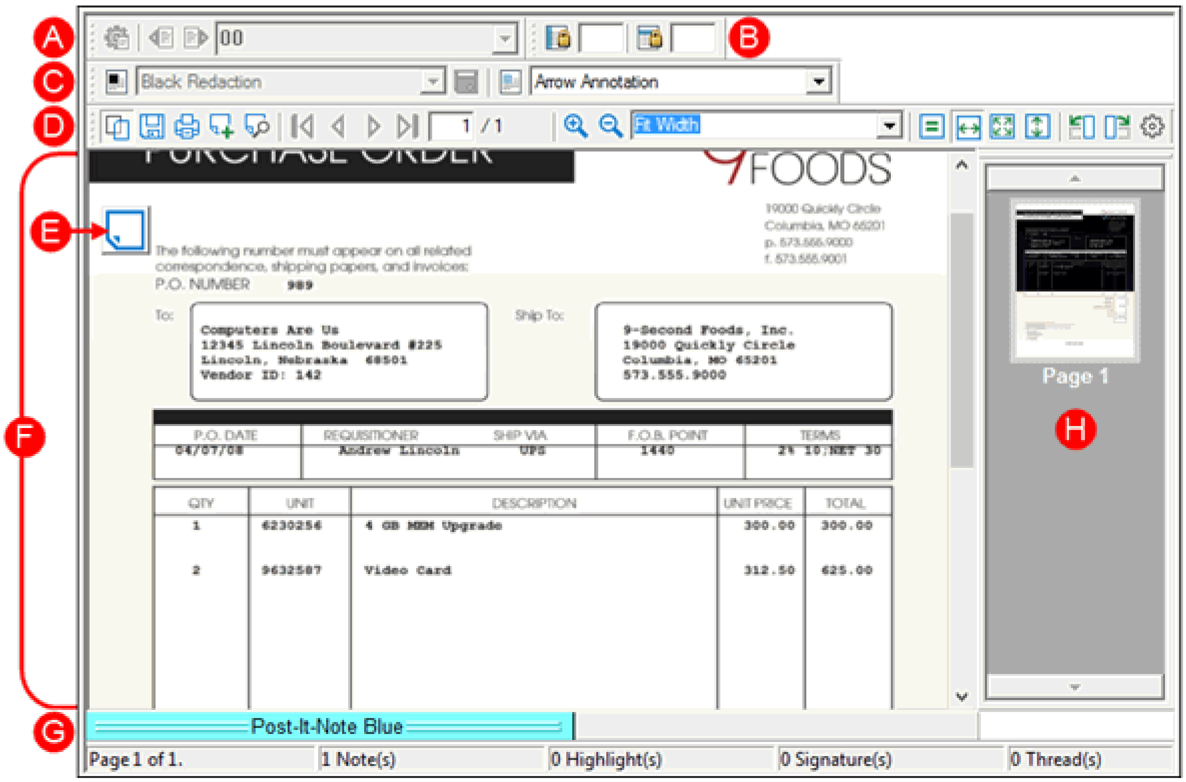
Select this option to enable auto-scrolling on documents. Auto-scrolling allows you to place the pointer at the edge of the viewer and scroll through the document vertically or horizontally. For example, to scroll down, you would place the pointer at the bottom of the viewer.

When this option is not selected, you must use the scrollbars or the mouse wheel to scroll through the document.



Display Options for Notes and Annotations

You can choose whether note or annotation icons are displayed on documents all the time, or only when the note's or annotation's tab is selected in the **Notes** toolbar.



Section	Description
A	Text Search Toolbar
B	Column/Row Locking Toolbar
C	Annotation Toolbar
D	Document Viewer Toolbar
E	Note Icon
F	Open Document
G	Notes Toolbar with Note
H	Pages Toolbar (contains thumbnails)

Show Note Icons and Annotations When Open

Select this option to allow annotations and note icons to be displayed on documents. When this option is not selected, annotations and note icons are not displayed on the document, even when the corresponding note is open.

Always Show Note Icons and Annotations

Select this option to always display annotations and note icons on documents. When this option is not selected, annotations and note icons are displayed only when the corresponding note is open. This option is unavailable if **Show Note Icons and Annotations When Open** is not selected.

Draw Annotation On Rubberband

Select to create annotations using the Rubber Band feature. This option allows you to create annotations without clicking the **Toggle Annotation** button.

When this option is selected, you can create annotations by pressing **Ctrl** as you click and drag the pointer across the document. When this option is not selected, you must click the **Toggle Annotation** button before drawing the annotation on a document.

Retaining the Zoom Region from Page to Page

By default, when the viewer displays a new page, the zoom level is retained, but the zoom region is reset to display the page's upper-left corner. Viewer options can be modified so that the region displayed in the viewer is retained from page to page. For example, if you are viewing the lower-right corner of a page, clicking the **Next Page** button will display the lower-right corner of the next page.

To retain zoom regions from page to page and document to document, select the **Reuse Zoom Region** option in the **Viewer Options** dialog box.

Note: The zoom region is not retained if **Fit in Window**, **Fit Width**, or **True Size** is selected in the Viewer Control toolbar. These settings take precedence over the **Reuse Zoom Region** option.

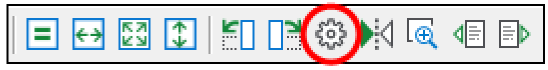
Suppressing Blank Pages

Depending on a document's configuration, you may be able to suppress the viewing of blank page thumbnails in the **Pages** toolbar. When this option is enabled, the thumbnails of pages that were marked as blank will not be displayed in the **Pages** toolbar.

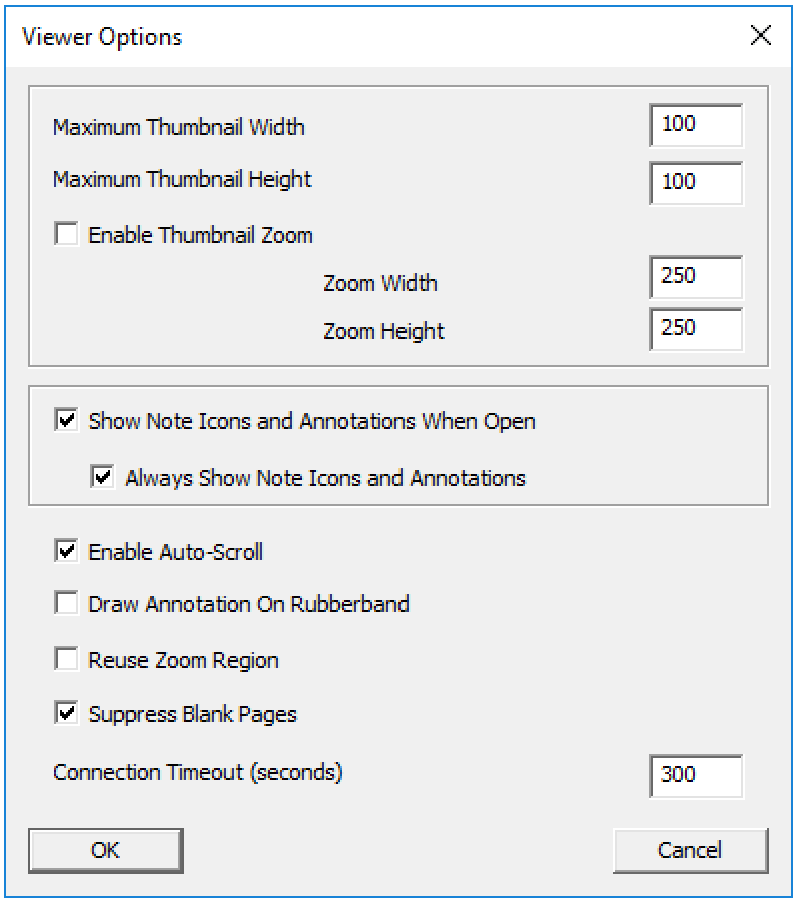
Note: The **Suppress Blank Pages** function is not supported in the ActiveX Web Client.

To suppress blank page thumbnails in the Document Viewer:

1. Click the **Options** button in the **Viewer Control** toolbar.



The **Viewer Options** dialog box is displayed.

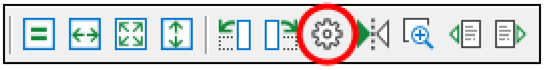


2. Select the **Suppress Blank Pages** check box. Clear the check box if you want the blank pages to remain in the **Pages** toolbar.
3. Click **OK** to save your changes. OnBase immediately changes the display of the thumbnails in the viewer based on whether or not the **Suppress Blank Pages** option is enabled or disabled.

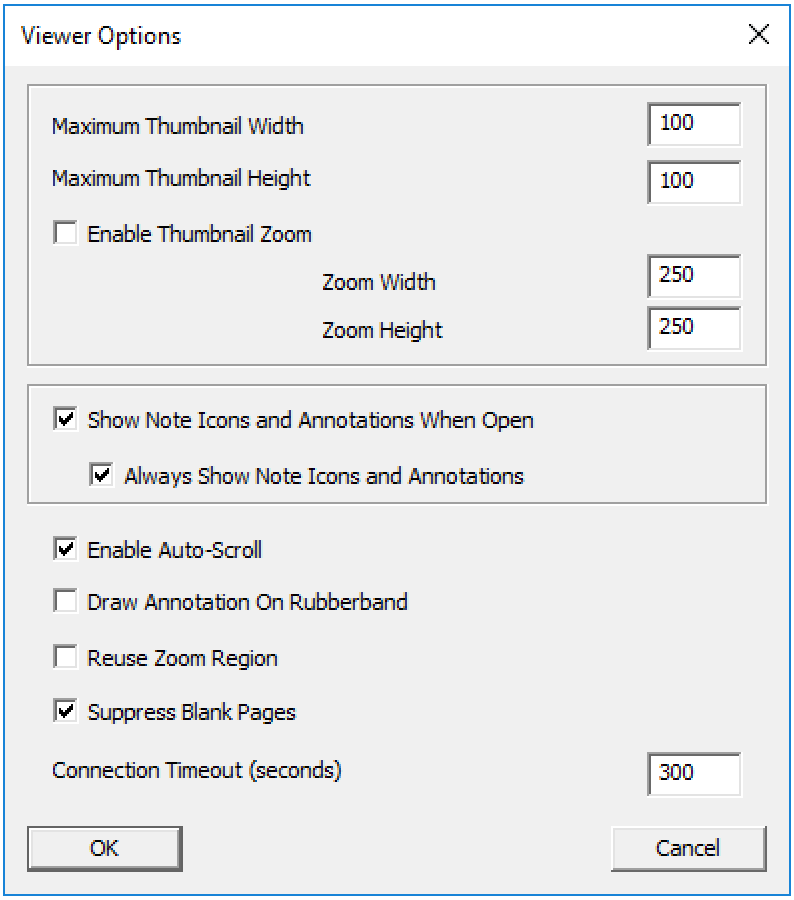
Adjusting Connection Timeout

If necessary, you can adjust the connection timeout for loading documents. If a large document is loaded over a slower network connection, the download of the file may time out before it finishes. The connection timeout can be increased to allow the client to have more time to load the document before the timeout is reached. To adjust the connection timeout, perform the following steps:

1. Click the **Options** button in the **Viewer Control** toolbar.



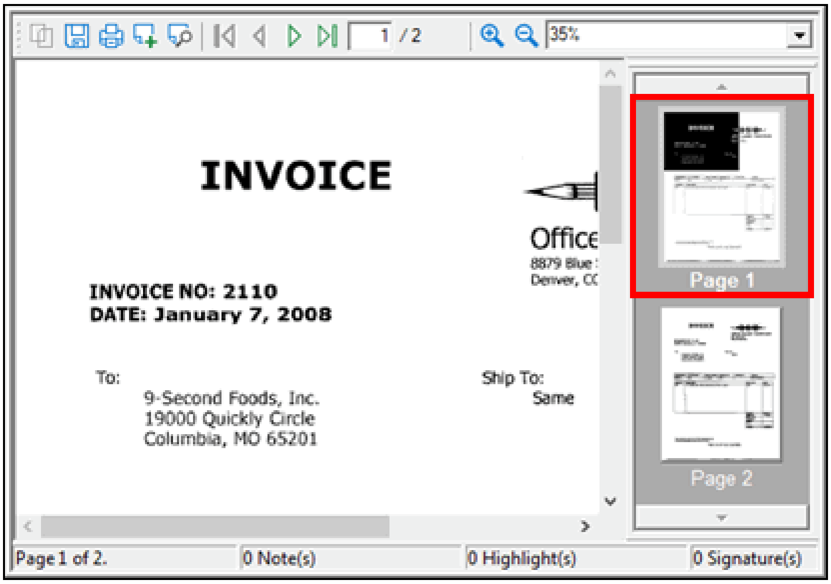
The **Viewer Options** dialog box is displayed.



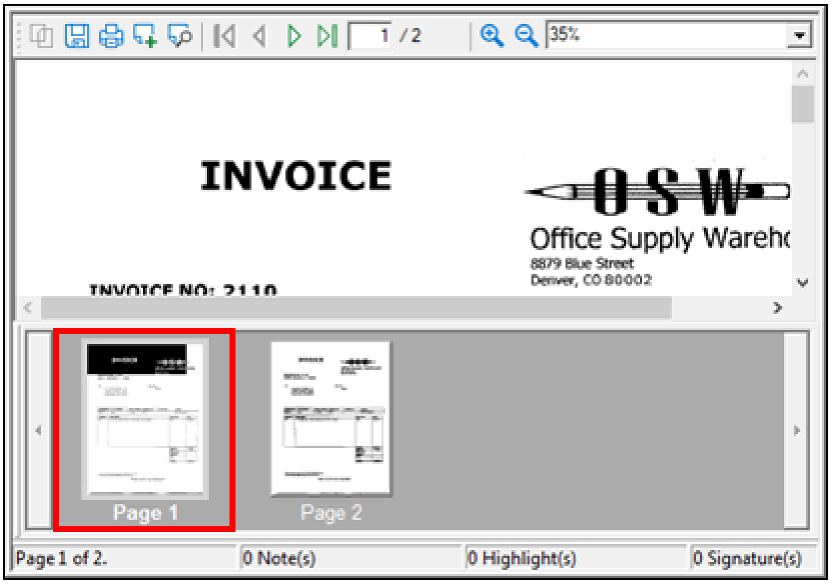
2. In the **Connection Timeout** box, adjust the timeout. The minimum and default setting value is **300** seconds (five minutes).
3. Click **OK** to save your changes.

Pages Toolbar - View Document Thumbnails

Document thumbnails are miniature representations of the document pages, which provide a method of document navigation. Document thumbnails display in the **Pages** toolbar window in the Document Viewer. By default, the Pages toolbar is displayed along the right edge of the Document Viewer in a vertical column.



You can change the position of the **Pages** toolbar by dragging and dropping it to another position in the Document Viewer. You can undock the toolbar from the Document Viewer using the same method.



Show or Hide Thumbnails

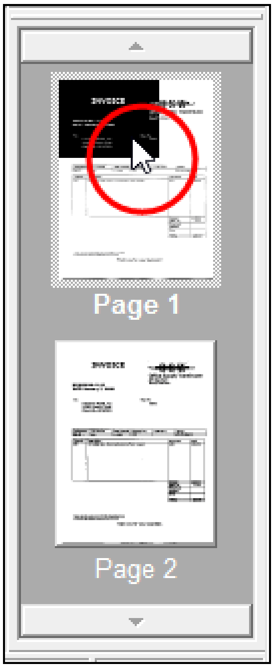
Thumbnails can be displayed or hidden by default. To show or hide thumbnails, right-click anywhere in the Document Viewer and select **Toolbars** | **Pages**. This toggles the thumbnails on or off.

Navigating the Document Using Thumbnails

You can navigate to a different page in the open document by double-clicking on the thumbnail for that page.

In documents with a large number of pages, you can click the up or down arrows to scroll through the page thumbnails. You can also quickly scroll through several thumbnails at a time by holding down the **Ctrl** button and left-clicking the up or down arrows.

If the document being viewed is larger than the viewer window, a shaded area on the thumbnail indicates the portion of the document currently displayed in the viewer window. Click and drag the shaded area to view other areas of the document.



Zooming Thumbnails

If thumbnail zoom is enabled in Viewer Options, you can zoom in on a thumbnail by placing your pointer over it. The percentage increase (or decrease) in thumbnail size is determined by the Zoom Width and Zoom Height settings in Viewer Options.

Reordering Pages in a Document Using Thumbnails

If you have appropriate privileges, you can reorder the pages in an image document using thumbnails.

1. In the Pages toolbar, double-click the thumbnail of the page that you want to move.
2. Right-click and drag the thumbnail to its new position. When you release the thumbnail, the Pages toolbar is updated to reflect the new sequence.

Note: You cannot reorder pages on a read-only document. If you attempt to do so, the system informs you that the document is read-only and cannot be modified.

Adding Pages to a Document Using Thumbnails

If you have appropriate privileges, you can add pages from one image document to another by dragging a thumbnail from one viewer window onto the Pages toolbar of a document in another viewer window.

You cannot add pages to read-only documents, to non-image documents, or to non-revisable documents that have a different file type than the added pages. If you attempt to do so, the system displays a warning indicating why the pages could not be added.

Note: You can only add pages to image documents in the ActiveX viewer.

To add pages to an image document:

1. Retrieve the document to which you want to add pages.
2. In the document select list, right-click the name of the document containing the page or pages that should be added to the document from the previous step and select **Open in New Window**.

   The selected document is displayed in a new viewer window.
3. In the **Pages** toolbar of the new window, select the page that you want to add to the first document.
4. Right-click and hold down the mouse button on the thumbnail for that page.
5. Drag-and-drop the thumbnail to the pages toolbar of the first document. When you drop the thumbnail on the pages toolbar, the page is added in the position where you dropped it. For example, if you drop the thumbnail on top of page 1, the new page becomes page 1, and the old page becomes page 2.

Deleting Pages from a Document Using Thumbnails

If you have appropriate privileges, you can remove pages from an image document by right-clicking the thumbnail of the page you want to delete in the **Pages** toolbar and selecting **Delete Page**. A confirmation window will be displayed to make sure you really want to delete the page.

You cannot delete pages from a read-only document. The **Delete Page** option is unavailable if the document is read-only.

Internal Text Search Toolbar

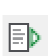
When using the OnBase Viewer, you can perform internal text searches for specific text strings within an open document using the **Text Search** toolbar.

The following information applies when working with the **Text Search** toolbar:

- You cannot execute an internal text search on a text document that has an overlay applied to it. Remove the overlay in order to execute the internal text search.
- If the document is a COLD-processed document with one or more column indexes defined, then you can limit the search to the block of text defined by a column index. This is recommended for large documents to improve performance time when searching.

Note: If the **Text Search** toolbar is not displayed above the document viewing area, then right-click anywhere in the document viewing area and choose **Toolbars | Text Search**.

The **Text Search** toolbar includes the following buttons:

Button	Description
	**Text Search Options** limits your searches to one or more columns (character positions) or to a column index (a predefined text block). You can also specify whether the search should start from the beginning of the document or the current page. For more information, see Limiting Searches Using Text Search Options on page 151.
	**Find Previous** searches for the preceding occurrence of the specified string within the current text document.
	**Find Next** searches for the following occurrence of the specified string within the current text document.

Performing an Internal Text Search

You can use the internal **Text Search** toolbar to search for specific text strings in an open document.

Note: If an overlay is turned on, you cannot perform an internal text search on the document.

Any previously entered search strings from the current Web Client session are retained in the drop-down list located on the **Text Search** toolbar. You can select a string from this list to quickly search the current document for that string. If you close the document and re-open it, the last 25 searches are displayed in the drop-down list.

To search for a text string, click in the **Search String** field and enter the characters to search for. Do one of the following:

- Click **Find Next** to locate the first occurrence of the text. You can also press **Enter** to initiate the search or to find subsequent occurrences of the text.
- Click **Find Previous** or press **Shift + Enter** to return to the previous search occurrence.

Any occurrences found in the document are displayed within a highlight bar. The actual search string is displayed in its own highlight box.

Limiting Searches Using Text Search Options

Searching an entire document for a specific text string can be time-consuming, especially if the document is very long. You can use text search options to limit your search. For example:

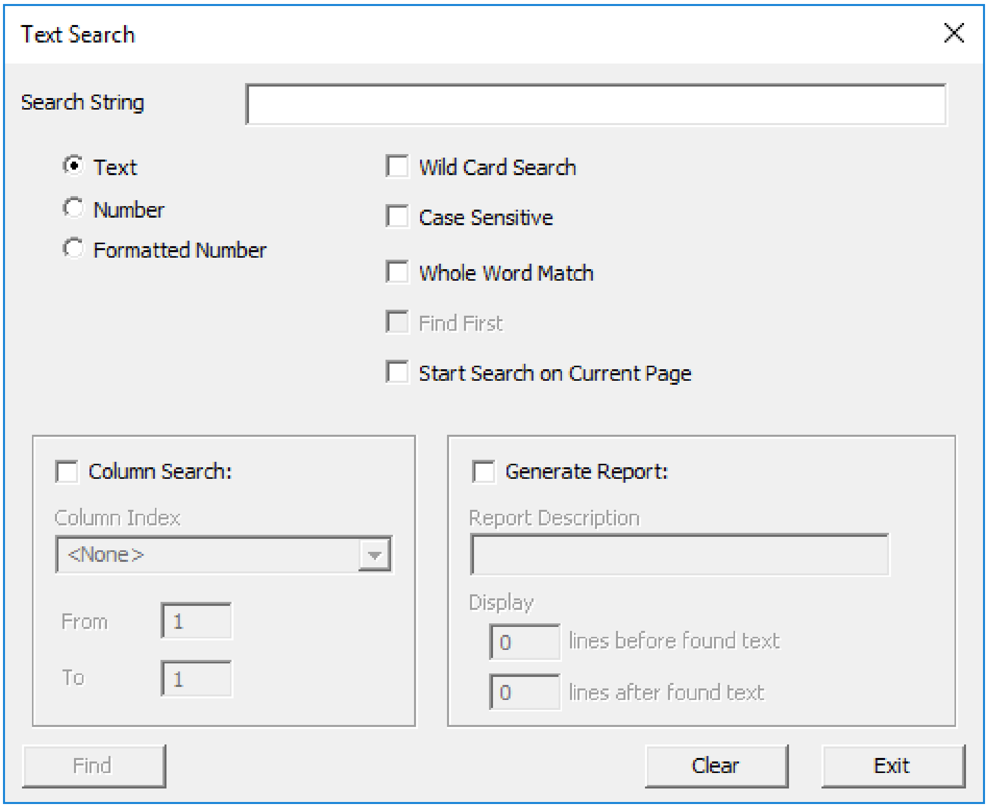
- If you know the string occurs somewhere between the current page and the end of the document, you can apply an option to start the search from the page you are currently viewing.
- If you know that the phrase you're looking for occurs only within a specific set of columns, you can limit the search to those columns.

The selected settings remain applied to all internal text string searches for the document displayed until the settings are changed, disabled, or until the Document Viewer is closed.

In addition to searching within columns, you may also be able to search predefined blocks of text using column indexes, depending on how the document was imported.

To perform a search using text search options:

1. Click the **Text Search Options** button on the **Text Search** toolbar. The **Text Search** dialog box is displayed.



2. Enter your search term in the **Search String** field.
3. For a search type, select any of the following options:

Option	Description
Text	Searches for alphanumeric text.
Number	Searches for numeric values. You can use this option with the following operators to limit the search: **=**, **>**, **<**, **=>**, and **<=**. You can use **and**, **or**, and **to** as operators to search for a range of values. For example, enter **2008 and 2009** to find documents containing both 2008 and 2009. **Caution:** If you are searching for an exact number that is part of an alphanumeric text string, then the number will not be found. For example, if you search for **001** and the actual text is **ABC001**, then the value will not be found.

Option	Description
Formatted Number	Searches for numeric values that use special characters. For example, to search for all Social Security Numbers greater than 800-00-0000, enter **> 800-00-0000** in the **Search String** field. You can use this option with the following operators to limit your search: **=**, **>**, **<**, **=>**, and **<=**. You can use the **and**, **or**, and **to** operators to search for a range of values. For example, enter **800-00-000 to 900-00-0000** to find documents containing values within this range. **Note:** When you search for formatted numbers greater or less than the entered search string, formatted numbers followed by periods are not included in the search results. For example, if the formatted number is the last word in a sentence, then it will be omitted as a result.

4. Select **Wild Card Search** to include wild card characters in your text string search criteria.
5. Select **Case Sensitive** to return only matches that have the same capitalization as the text string search criteria.
6. Select **Whole Word Match** to find a text string that matches the exact word (not just characters matching the search criteria). If there are any spaces within the text string, the **Whole Word Match** check box will be unavailable.

Note: Find First is only available for External Text Search.

7. Select **Start Search on Current Page** to begin the search on the current page. Clear this option if you want the search to begin on the first page of the document.

   When this option is selected, the following occurs when using the **Text Search** toolbar:

   - If you search using only the **Find Previous** button, the pages that follow the current page are omitted from the search.
   - If you search using only the **Find Next** button, the pages that precede the current page are omitted from the search.
8. Select **Column Search** to search within the specified columns. Use any of the following options:

Option	Description
Column Index	Select this option to search a block of text as selected from the **Column Index** drop-down list. The **Column Index** drop-down list is unavailable if the document has no column indexes.
From	Enter the character position of the column to start the search in (the leftmost column to be searched). The column of characters at the far left of the document is **1**, the next column to the right is **2**, and so on.

Option	Description
To	Enter the character position of the column to end the search in (the rightmost column to be searched). The number in the **To** field must be greater than or equal to the number in the **From** field.

9. Select **Generate Report** to create a report, which is stored under the **SYS - Search Reports** Document Type. Use one or both of the following options:

Option	Description
Report Description	Enter a name for the generated report.
Display	Enter the number of lines of text to show above and below the found text in the **Lines before found text** and **Lines after found text** fields.

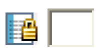
10. Click **Find**. The search is executed with the selected options.

Using the Column/Row Locking Toolbar

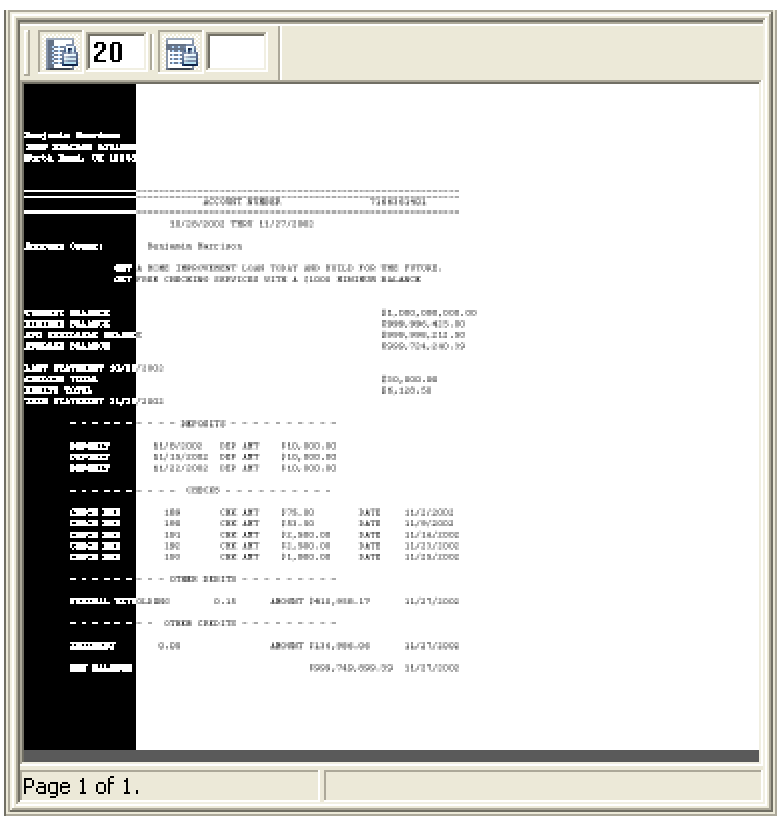
This toolbar is available for text report formatted documents. The Column/Row Locking toolbar allows you to lock the position of the specified number of columns and/or rows of text.

This allows you to "dock" an area of the page (such as header information that you want to remain viewable), while scrolling through the document.

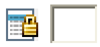
Locking Columns

1. In the column data entry field, enter the number of columns of text (from the left of the document) to lock.
2. Click  **Lock Columns**.

   The locked columns are displayed in the shaded region.

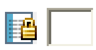
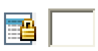


Locking Rows

1. Enter the number of rows (from the top of the document) to lock in the row data entry field.
2. Press  **Row Lock**. The locked rows are displayed in the shaded region.
3. Use the standard scroll arrows in the document viewer to move through the document, while maintaining the stationary lock area. Columns and rows can be toggled between a locked and unlocked state by alternately pressing the associated column lock icon or row lock icon.

Column/Row Locking Toolbar

The **Column/Row Locking** toolbar is available for text documents when using the OnBase Viewer. Use this toolbar to lock columns of text into place at the left of the document, or to lock rows of text into place at the top of the document, keeping them static as you scroll through a page.

Button	Description
	**Lock Columns** locks the number of columns specified in the adjacent field. The number of columns you specify is the number of character positions at the left of the page.
	**Lock Rows** locks the number of rows specified in the adjacent field. The number of rows you specify is the number of lines at the top of the page.

Any locks you specify will be applied to the current document for as long as it remains open. They will be removed as soon as you close it or open another document in the same viewer. If you return to the same document later, even in the current session, the columns or rows will be unlocked.

Notes and Annotations

You can apply a note for another user to see, to call attention to a certain part of the document, or to hide part of a document using notes, staples, annotations, and redactions.

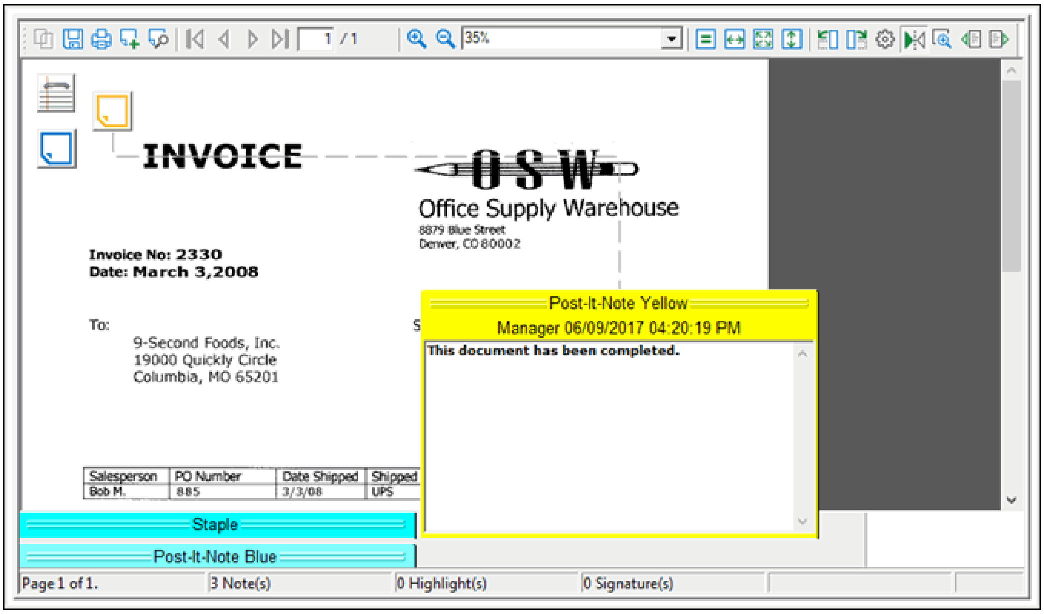
Note: You can view notes on an OLE document (such as a Microsoft Office document or PDF) in the **Notes** pane in the Document Viewer. See Notes Pane Viewer for OLE Documents on page 179. To add, edit, or delete notes on an OLE document, you must use the **Notes** dialog box. See Notes Dialog Box on page 169.

Caution: If a note, redaction, burned markup, or deficiency is not in the location you expect, do not save or sign the document until the location has been corrected by your system administrator. When the document is saved or signed, the pending redaction, burned markup, or deficiency is permanently placed in the shifted location. The shifting of notes that do not permanently alter the document can be corrected any time by your system administrator.

Notes Overview

Digital notes can be placed on documents and can be used for many purposes, including the following:

- Emphasizing specific content within the document
- Clarifying or explaining items in a document
- Representing the current state of the document.



Note: The look and feel of the Notes differ depending on whether you are logged in to the ActiveX Client or the HTML Client.

The characteristics of different Note Types are defined by your system administrator:

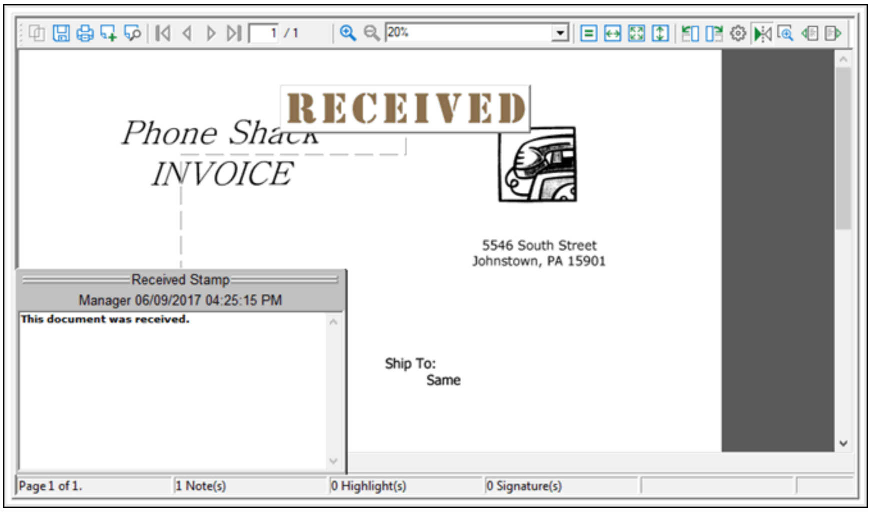
- Some notes may be configured to hide by default. To view any hidden notes, you can display a list of all notes on the document and open any notes from the list.
- Depending on your system setup and user privileges, you may be able to view, modify, delete or add notes to a Document Type, as well as set privacy options.
- You can type text in notes and search for note text in Document Retrieval or Custom Queries. Some notes are configured with default text that is also searchable using Document Retrieval or Custom Queries.
- Typically, notes are configured to show an Auto-Name string in the title bar, identifying the type of note when it is placed on a document. Other typical items in an Auto-Name string are note creation date and time and the name of the user who created the note.

Note: Any time or date in the note Auto-Name string (the top line of the note header) respects the Windows Region and Language settings of the user applying the note at the time the note is added. The time and date in the second line of the note header respect the Windows Region and Language settings of the user currently viewing the note.

Note Icons

Depending on the Note Type configuration and the Document Type, the note may display as an icon, indicating the type of note, such as a **Received** stamp.

Note: Note icons can only be displayed on image and text documents.



Options

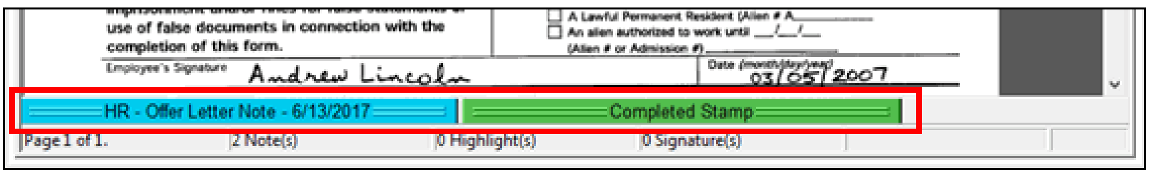
The **Options** button on the Viewer Control toolbar allows you to choose whether note icons and annotations are displayed while you're viewing a document.

Notes Toolbar

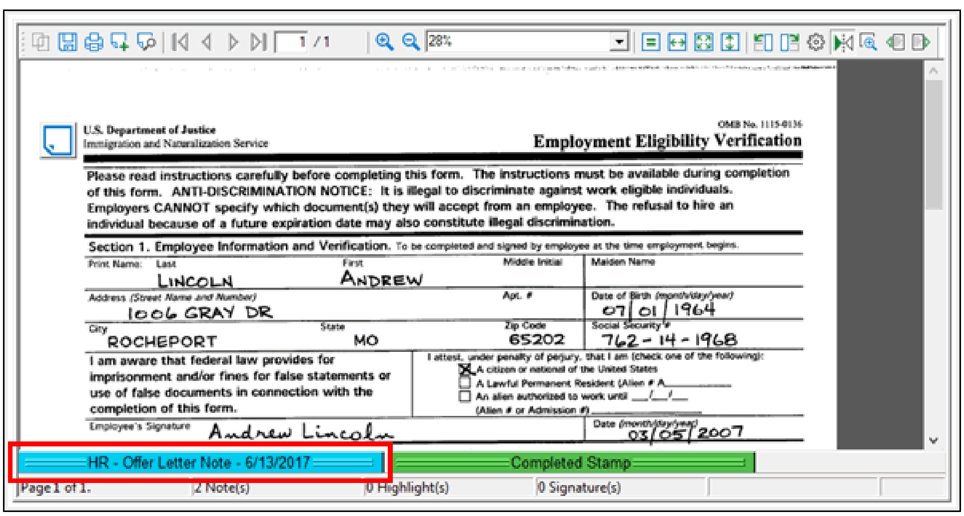
The **Notes** toolbar is a row of tabs representing notes and annotations on the current page. The toolbar is displayed along the bottom of the Document Viewer. You cannot undock and move this toolbar to another location.

Note: The **Notes** toolbar is only available in the ActiveX Web Client.

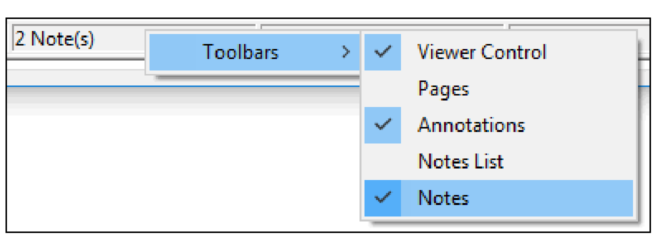
Note: If you are viewing a document that is locked by Records Management, you cannot create or modify notes.



Click a note tab to read the note or annotation.



If you do not see the note tab, but there are notes on the document, ensure that the **Notes** toolbar is visible. Right-click the status area on the bottom of the screen, and then select the **Toolbars | Notes** menu option.

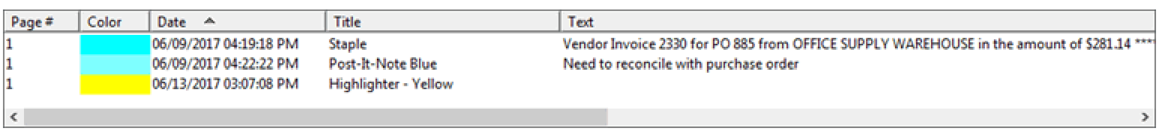


Note: HTML documents do not have toolbars. When you open an HTML document with one or more notes, OnBase displays the associated icon(s). Double-clicking an icon opens the note and displays its text. This action works only from HTML documents or from documents viewed in the HTML Web Client. Double-clicking a note icon from the ActiveX Web Client will trigger any cross-references set up on the document.

Notes List Toolbar

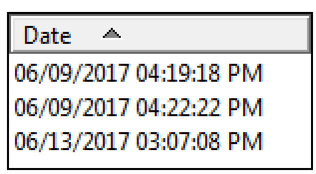
The **Notes List** toolbar displays all notes and annotations attached to a document in a list format. It tells the user the page on which the note is found, the note color, the date the note was created, the note type, and any text included within the note.

Note: The **Notes List** toolbar is only available in the ActiveX Web Client. It is also only available for image, text, and PCL documents.



The following options are available in the Notes List:

- Click a column header to sort the notes by that column. A down arrow in a column header means the list is sorted by that column in descending order, and an up arrow means it is sorted in ascending order.



- Open a note by double-clicking the note in the **Notes List** toolbar.
- If you edit text within a note, the **Text** column of the **Notes List** toolbar will be updated to reflect the changes after the note is minimized.
- To resize the **Notes List** toolbar, first undock it from its fixed position by positioning your pointer on one of the toolbar's edges and dragging it to a new position. You can then adjust the height of the **Notes List** toolbar by dragging its top or bottom border. Once docked, the toolbar will retain its new height.

This toolbar is not displayed by default on documents without notes. For more information, see Showing or Hiding Toolbars on page 124.

View Notes - Open and View Notes or Annotations

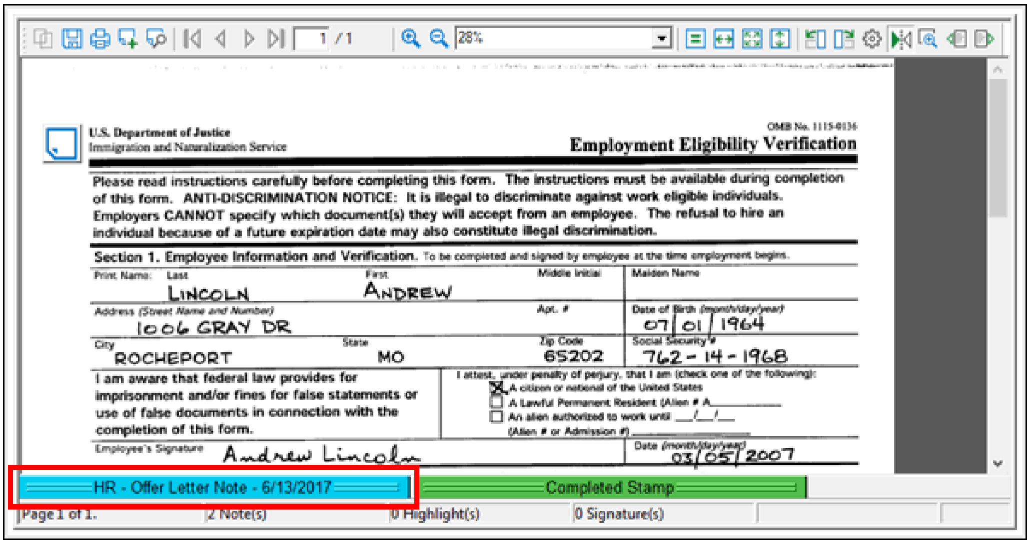
Users with the appropriate viewing rights will see most notes and annotations displayed on the document or displayed as tabs in the Notes toolbar at the bottom of the document.

When you view OLE documents (such as Microsoft Office documents or PDFs) in the Web Client, the number of notes on the document is displayed in the **Note(s)** section of the status bar and in the **Notes** pane of the Document Viewer.

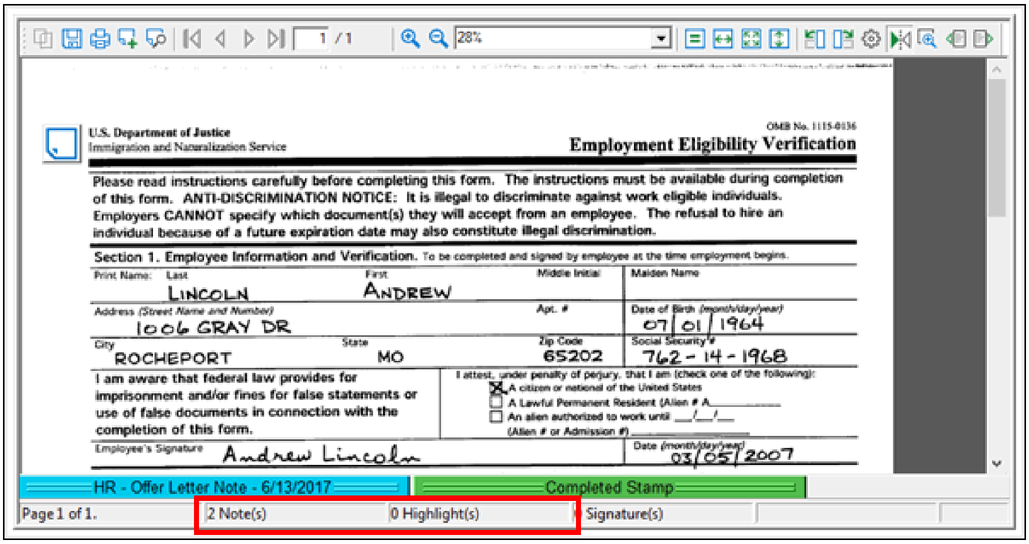
Viewing Notes

You can view notes or annotations using any of the following methods:

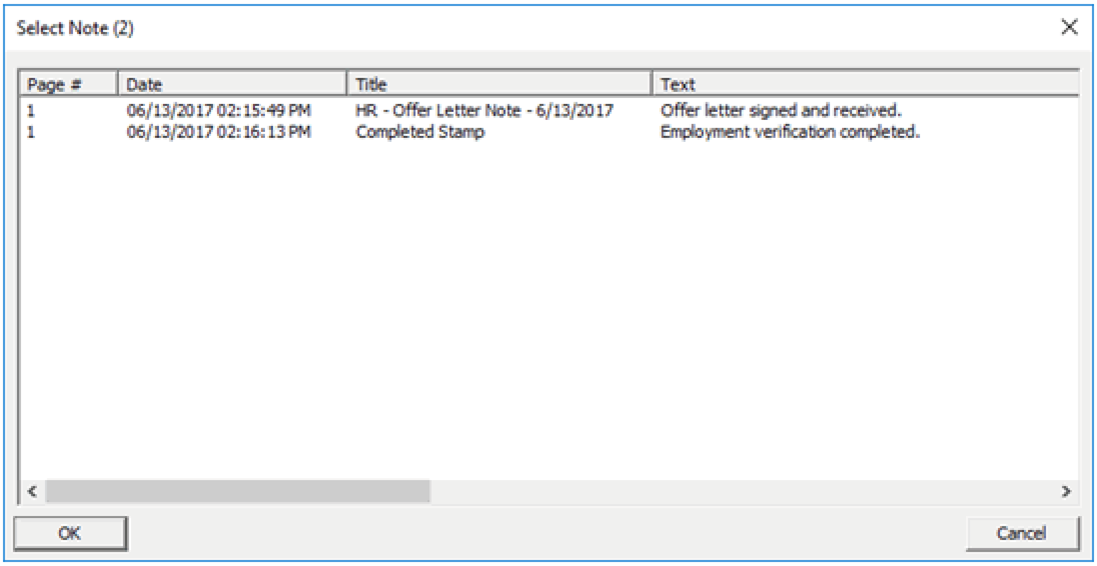
- Double-click the note's icon from the Document Viewer.
- Click the **View Notes** toolbar icon (ActiveX viewer only).
- Click the note's tab displayed in the **Notes** toolbar (ActiveX viewer only).



- Right-click an open document and select **Notes | View Notes**.
- Double-click the note in the **Notes List** toolbar.
- Double-click the **Note(s)** section or the **Highlight(s)** section of the status bar.



If a note or annotation exists on a document, it is listed in the **Select Note** dialog box.



The list includes the page where the note is found, the note type, the text of the note, and the date the note was created. Click on the column headings to sort the notes by that column.

Open a note by either selecting the note in the **Select Notes** dialog box and clicking **OK**, or by double-clicking the note in the **Select Note** list.

Note: Depending on your system's configuration, you may be unable to open certain notes in the **Select Note** dialog box. See your system administrator if you have any questions.

Moving Notes

If you have sufficient privileges to modify a note, you can move the note on a document.

To move a note, click and drag the note icon on the document. The new position is saved when you close or print the document.

Note: If you move a note off of the document, OnBase automatically resets the note position to the top left corner when the document is closed. When the document is opened again, the note is displayed in the top left corner.

Adding Notes, and Editing and Deleting Notes and Annotations

Notes and annotations can be added to, edited, or deleted from documents. Before you start working with Notes and annotations, ensure you have appropriate privileges for adding, editing, or deleting them.

Note: If you have privileges to create a note but do not have privileges to modify it, you can modify the note's text and position only during the same viewing session that you created the note. After you close the document, the note's text becomes read-only. You can reposition the note while viewing the document, but the note will return to its original position when you close the document.

Take note of the following when working with notes and annotations:

- Notes and annotations may contain messages that can be displayed and edited. If you have appropriate privileges, you can delete both notes and annotations from the **Notes** right-click menu.
- Note behavior differs slightly on HTML documents and in the HTML Document Viewer. For information about working with notes in these cases, see Add a Note in the HTML Document Viewer on page 165.
- Annotations are created using the Annotations toolbar. To add an annotation to a document, see the procedure for creating annotations.

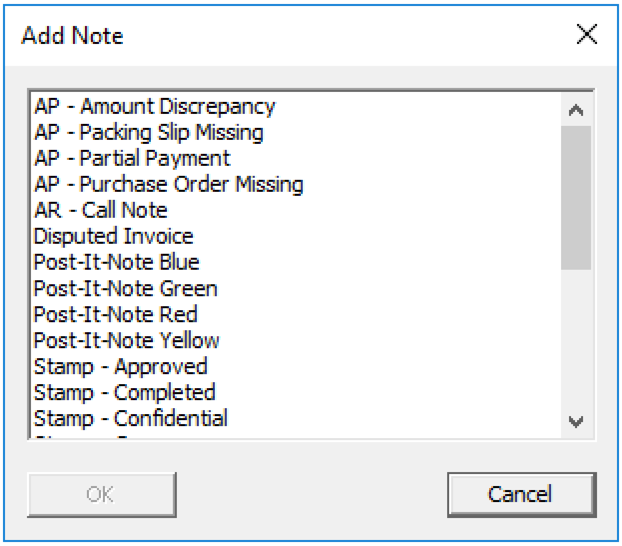
Add a Note to a Document

Users with privileges to create notes can add new notes to documents from the **Add Note** dialog box. Users can only add notes of the type(s) that his or her User Group(s) has rights to create.

Note: If you are viewing a document that is locked by Records Management, you can create new notes, but you cannot modify any existing notes.

1. Access the **Add Note** dialog box using either of the following methods:
   - Click the **Add Note** button from the Viewer Control toolbar.
   - Right-click the document and select **Notes | Add Note**.

   The **Add Note** dialog box displays the Note Types that you have rights to create.



2. Select a Note Type and double-click, or click **OK** to add the note.
3. Enter descriptive text and move the note icon to the desired location on the document. The note text and icon, in the position you placed it, is saved automatically.

Add a Note in the HTML Document Viewer

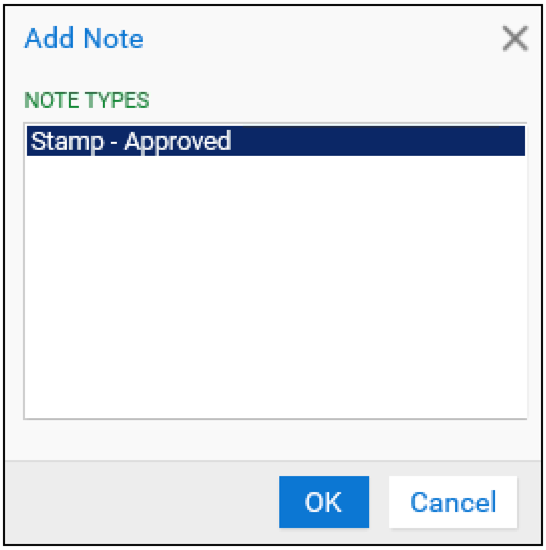
The following steps describe how to add notes to HTML documents and E-Forms and how to add notes in the HTML Document Viewer.

Note: You cannot add annotations to HTML documents.

To create a note:

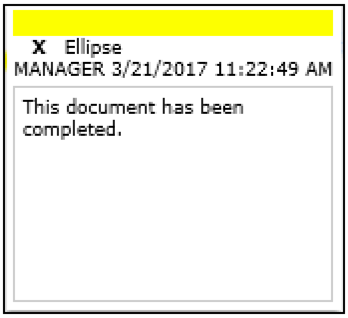
1. Right-click on the document and select **Note | Add Note**, or press **Ctrl + N**. The **Add Note** dialog box lists the available Note Types.

Note: The **Ctrl + N** shortcut is not supported in Chrome.



2. Select a Note Type and double-click, or click **OK** to add the note.

   The note is placed in the upper left-hand corner of the document. You can move the note by clicking and dragging the note or note icon on the document. The new position of the note is saved when an action is performed in either the document viewer toolbar or the right-click menu.



3. Edit or type a message in the note's text box. Notes are limited to 250 characters.
   - To minimize a note on an HTML document, double-click the note's title bar. The note's icon is displayed while the note is minimized. To view the note's text, double-click the note's icon.
   - To delete a note from an HTML document, click the **X** in the note's title bar. Click **Yes** to verify that you want to delete the note.
   - To change the note type, right-click the note and select **Change Note Type**. Select a new note type for the note.

Edit Note or Annotation Text

To edit a note, open the note and edit the note contents. Right-click for text-editing options:

Note: If you are unable to access the text box, you may not have user rights to edit the note.

- **Undo** - select to undo the last typed action
- **Cut** - removes selected text and place it on the clipboard
- **Copy** - retains selected text, but place it on the clipboard
- **Paste** - inserts clipboard text in to the active area (last place the mouse was clicked)
- **Delete** - deletes selected text
- **Select All** - selects all text (including default note text)

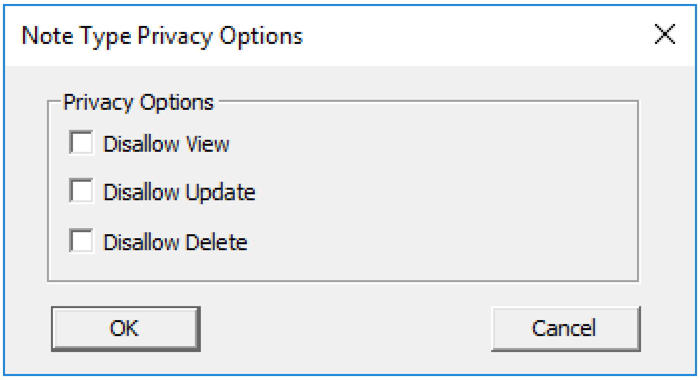
Note: Changes to notes and annotations are saved automatically. Notes that are moved off of the document revert to their last saved position.

Editing Note Type Privacy Options

Privacy options determine whether other users can view, edit, or delete an individual note you created.

1. To edit privacy options on a specific note, do one of the following:
   - Right-click on the note title bar and select **Privacy Options**.
   - Right-click the note in the **Notes List** toolbar and select **Privacy Options**.

   The **Note Type Privacy Options** dialog box is displayed.

   Some options may be unavailable depending on how the Note Type was set up by a system administrator.
2. Select one of the following options to restrict other users from performing the corresponding action.

Privacy Option	Description
Disallow View	Selecting this check box disallows users from viewing the note.
Disallow Update	Selecting this check box disallows users from updating information on the note.
Disallow Delete	Selecting this check box disallows users from deleting the note.

3. Click **OK** when you have selected the desired privacy options.

Deleting a Note

To delete an existing note in the ActiveX Viewer, do one of the following:

- Right-click on the note title bar and select **Delete Note**.
- Right-click the note in the **Notes List** toolbar and select **Delete Note**.

To delete an existing note in the HTML Document Viewer, do one of the following:

- Open the note and click the X in the note title bar.
- Click the **Notes** section on the bottom of the screen. Select the note you want to delete, and then click **Delete Note**.

Click **Yes** when prompted to confirm.

Note: You cannot delete an existing note on a locked document. See your system administrator for information regarding Document Lock Administration.

Changing the Note Type

To change the Note Type of an existing note, navigate to the page of the document the note appears on, and do one of the following:

- Right-click on the note title bar and select **Change Note Type**.
- Right-click the note in the **Notes List** toolbar and select **Change Note Type**.

Note: The **Change Note Type** option in the **Notes List** toolbar is only available when the page the note belongs to is displayed in the Document Viewer. For example, the option is not available if page 1 is displayed, and the note you right-click is on page 2.

Select the new type of note from the **Change Note Type** dialog box and click **OK**.

Note: Depending on system configuration for Note Types, some Note Types may be unavailable from the **Change Note Type** dialog box when using the ActiveX Web Client. See your system administrator for more information.

Notes Dialog Box

If you have appropriate privileges, you can add, view, edit, or delete notes using the **Notes** dialog box. The **Notes** dialog box is available in the following ways:

- Right-click a document in the Document Search Results list, which allows you to work with notes without opening documents.
- Right-click an open image document in the Document Viewer and select **Notes | View Notes** (HTML Web Client only).
- Click the **Note(s)** section of the status bar of the Document Viewer (HTML Web Client only).

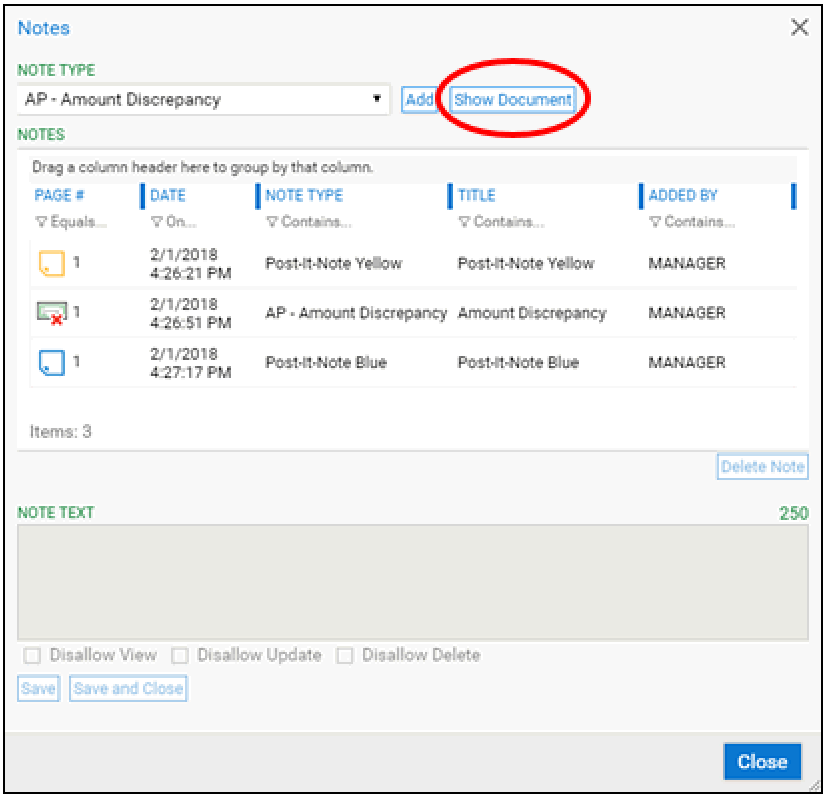
- For OLE documents (such as Microsoft Office documents or PDFs):
  - Select **Edit | Notes** from the OLE viewer menu.
  - Click **Edit** on an open note in the **Notes** pane.
  - Click the **Add Note** button in the **Notes** pane.

The **Notes** dialog box is the only way to add, edit, and delete notes on OLE documents in the Web Client. You can view the number of notes on an OLE document in the **Note(s)** section of the status bar or in the heading of the **Notes** pane in the Document Viewer. See Notes Pane Viewer for OLE Documents on page 179 for more information on viewing notes on OLE documents.

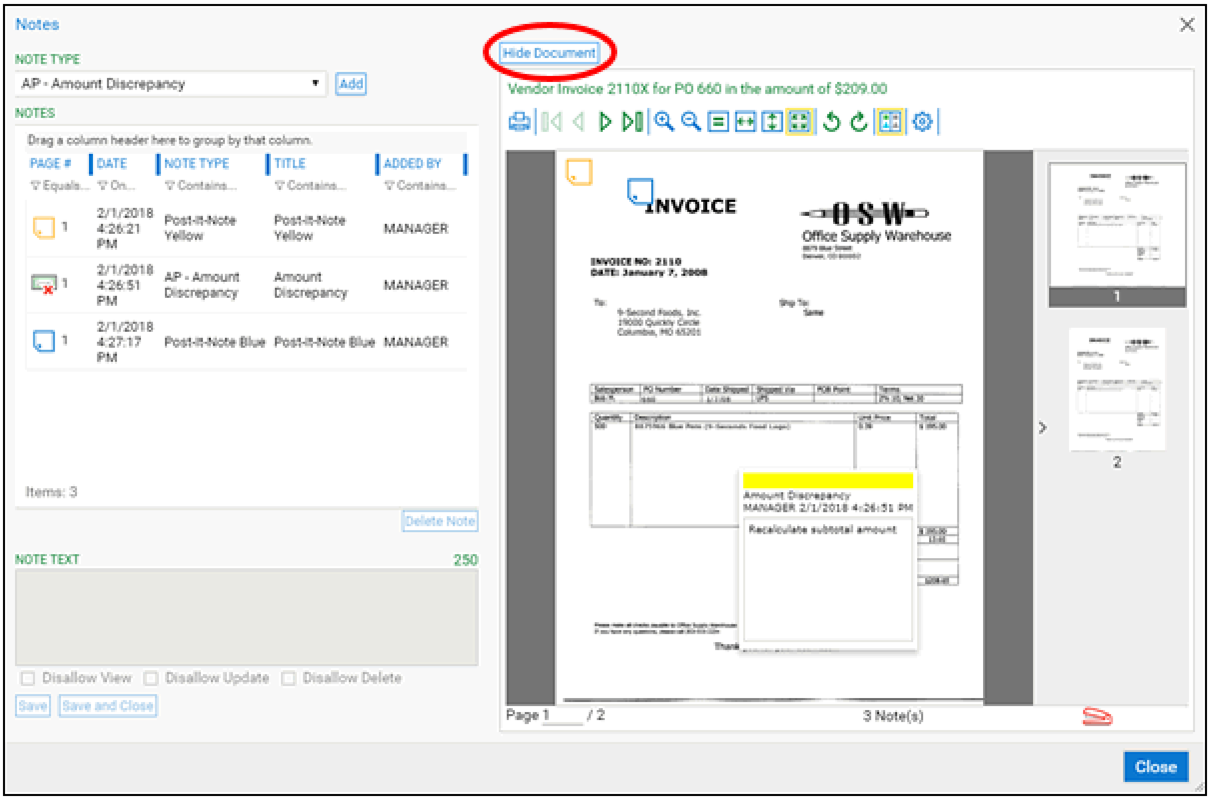
Note: If you have privileges to create a note but do not have privileges to modify it, you can modify the note's text only during the same viewing session that you created the note. After you close the document, the note's text becomes read-only.

Viewing a Document in the Notes Dialog Box

While working in the **Notes** dialog box, you can click the **Show Document** button to view the document alongside the notes in the dialog box.



Click **Hide Document** to hide the document and show only the notes in the dialog box.



Note the following limitations with viewing a document alongside notes in the **Notes** dialog box:

- Notes can only be added to the first page of a multi-page document in the **Notes** dialog box.
- Annotations cannot be drawn on a document being viewed in the **Notes** dialog box.

To accomplish any of these actions, perform them in the Document Viewer, not in the **Notes** dialog box.

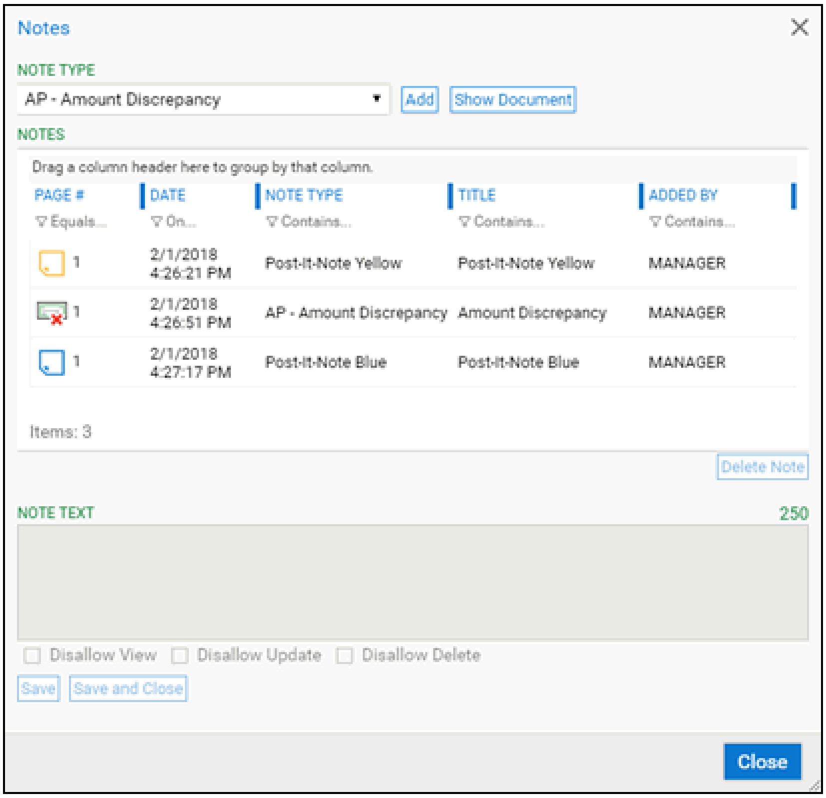
Viewing a Note in the Notes Dialog Box

To view a note in the **Notes** dialog box:

1. Open the **Notes** dialog box using one of the following methods:
   - Right-click a document in the Document Search Results list and select **Notes**.
   - Right-click an open document in the Document Viewer and select **Notes | View Notes** (HTML Web Client only).
   - Click the **Note(s)** section of the status bar (HTML Web Client only).

- From an open OLE document (such as a Microsoft Office document or PDF):
  - Select **Edit | Notes** from the OLE viewer menu.
  - Click **Edit** on an open note in the **Notes** pane.

The **Notes** dialog box displays any notes on the document.



2. Select a note to view any note text in the **Note Text** box.

Adding a Note in the Notes Dialog Box

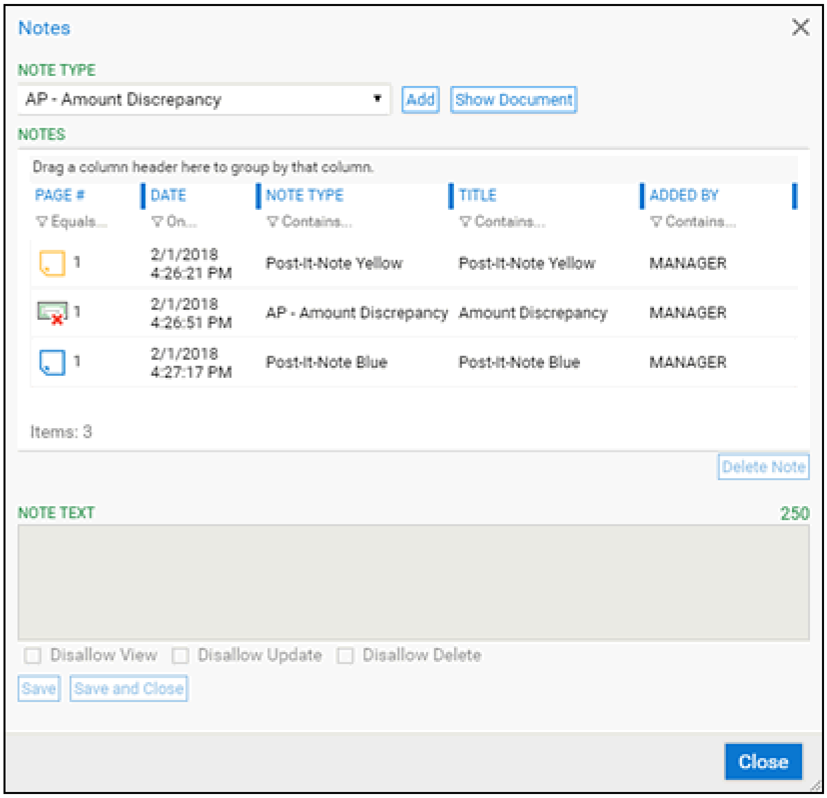
The **Notes** dialog box allows you to add, view, edit, or delete notes on an open document.

To add a note using the **Notes** dialog box:

1. Open the **Notes** dialog box using one of the following methods:
   - Right-click a document in the Document Search Results list and select **Notes**.
   - Right-click an open document in the document viewer and select **Notes | View Notes** (HTML Web Client only).
   - Click the **Note(s)** section of the status bar (HTML Web Client only).

- From an open OLE document (such as a Microsoft Office document or PDF), do one of the following:
  - Select **Edit | Notes** from the OLE viewer menu.
  - Click the **Add Note** button in the **Notes** pane.

The **Notes** dialog box is displayed.



2. Select a note type from the **Note Type** drop-down list, and click **Add**. The new note is added to the **Notes** list. If the note type is configured to include default text, it is displayed in the **Note Text** field.
3. Enter or modify the text of the note in the **Note Text** field. The character counter displays the remaining characters allowed in the note.

4. Select the privacy options to enable or disable for the selected note. The following privacy options are located below the **Note Text** field:

Note Privacy Option	Description
Disallow View	Prohibits all other users from viewing the note. **Note:** If this option is selected, other users can still successfully search for text in the note using the OnBase Client, but they will not be able to view the note.
Disallow Update	Prohibits all other users from editing the note.
Disallow Delete	Prohibits all other users from deleting the note.

Note: Depending on the configuration of the note type, you may be unable to modify some privacy options. For more information on note privacy options, see Setting Note Privacy Options on page 177.

5. Click **Save** to save the note to the document and keep the **Notes** dialog box open, or click **Save and Close** to save the note and close the **Notes** dialog box.

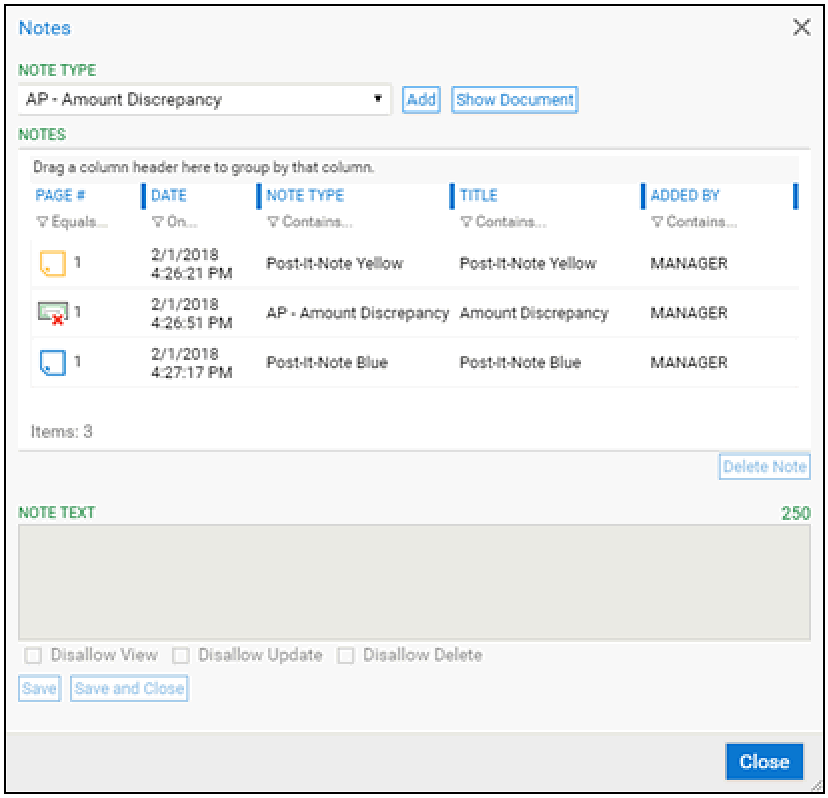
Editing a Note in the Notes Dialog Box

To edit a note in the **Notes** dialog box:

1. Open the **Notes** dialog box using one of the following methods:
   - Right-click a document in the Document Search Results list and select **Notes**.
   - Right-click an open document in the Document Viewer and select **Notes | View Notes** (HTML Web Client only).
   - Click the **Note(s)** section of the status bar (HTML Web Client only).

- From an open OLE document (such as a Microsoft Office document or PDF):
  - Select **Edit | Notes** from the OLE viewer menu.
  - Click **Edit** on an open note in the **Notes** pane.

The **Notes** dialog box is displayed.



2. Select the note to be edited from the **Notes** list.
3. Edit the text in the **Note Text** box. Right-click for additional text editing options. The character counter displays the remaining characters allowed in the note.
4. Click **Save** to save the note to the document and keep the **Notes** dialog box open, or **Save and Close** to save the note and close the **Notes** dialog box.

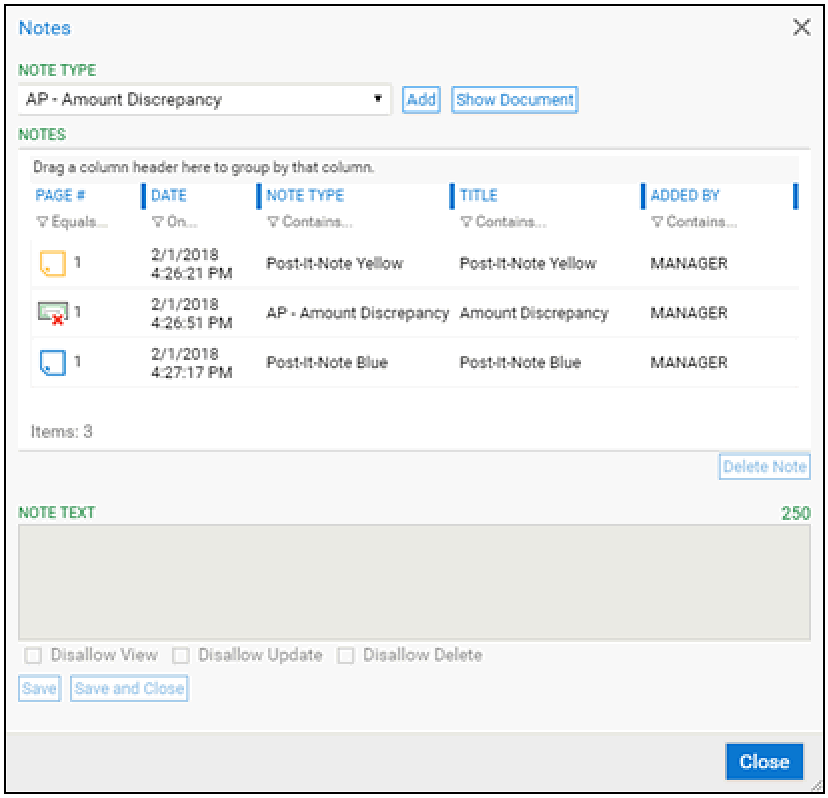
Deleting a Note in the Notes Dialog Box

To delete a note from the **Notes** dialog box:

1. Open the **Notes** dialog box using one of the following methods:
   - Right-click a document in the Document Search Results list and select **Notes**.
   - Right-click an open document in the Document Viewer and select **Notes | View Notes** (HTML Web Client only).
   - Click the **Note(s)** section of the status bar (HTML Web Client only).

- From an open OLE document (such as a Microsoft Office document or PDF):
  - Select **Edit | Notes** from the OLE viewer menu.
  - Click **Edit** on an open note in the **Notes** pane.

The **Notes** dialog box is displayed.



2. Select the note to be deleted from the **Notes** list.
3. Click **Delete Note**. You are prompted to confirm the deletion.
4. Click **Yes** to delete the note.

Note: If you delete a Staple note from the Notes list on one document, the corresponding staple that was attached to the deleted staple is still displayed on the other corresponding document. If you do not want the staple on the corresponding document, you must delete it also.

Setting Note Privacy Options

Depending on your system's configuration, you may be able to set privacy options for notes that you have created. Privacy options are used to determine whether or not other users can view, change, or delete a note that you have created.

Consider the following when setting note privacy options in the Web Client:

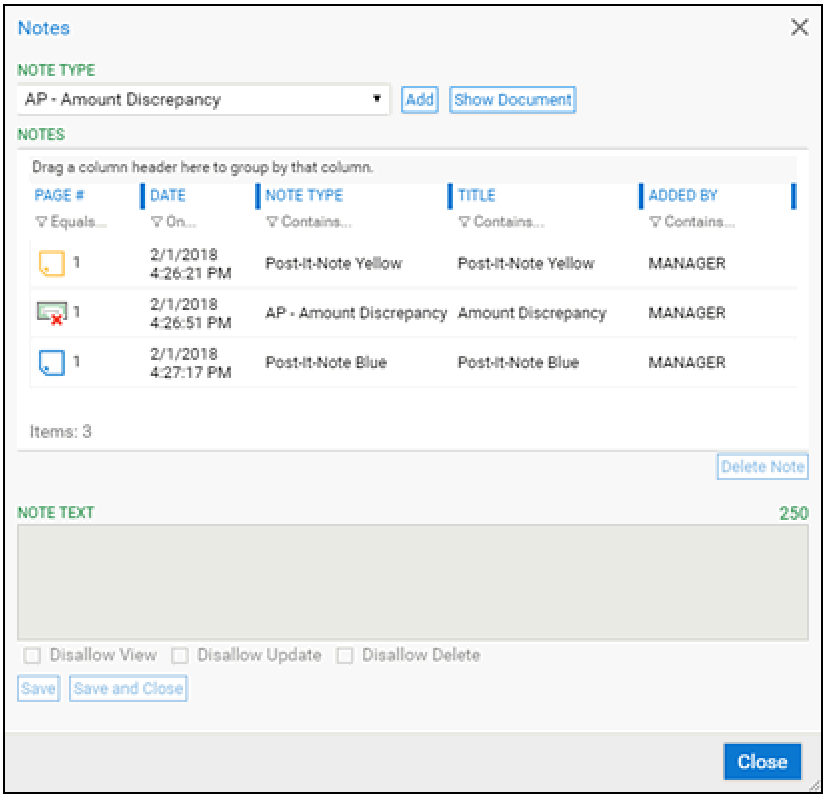
- Users with administrative rights are always able to view, update, and delete all notes and to view and set note privacy options for all notes.
- Only the creator of a note (and any users with administrative rights) can view and set the privacy options of that note.
- If a document is locked, the privacy options for all notes on that document cannot be modified by any other users. This includes any users with administrative rights.
- The privacy options for a note type may be set by default by your system administrator.

In the Web Client, note privacy options are set in the **Notes** dialog box. To set note privacy options:

1. Open the **Notes** dialog box using one of the following methods:
    - Right-click a document in the Document Search Results list and select **Notes**.
    - Right-click an open document in the Document Viewer and select **Notes | View Notes** (HTML Web Client only).
    - Click the **Note(s)** section of the status bar (HTML Web Client only).

- From an open OLE document (such as a Microsoft Office document or PDF):
  - Select **Edit | Notes** from the OLE viewer menu.
  - Click **Edit** on an open note in the **Notes** pane.

The **Notes** dialog box is displayed.



2. Select the note that you want to modify from the **Notes** list.
3. Select the privacy options to enable or disable for the selected note. The privacy options are located below the **Note Text** field. The following privacy options are available:

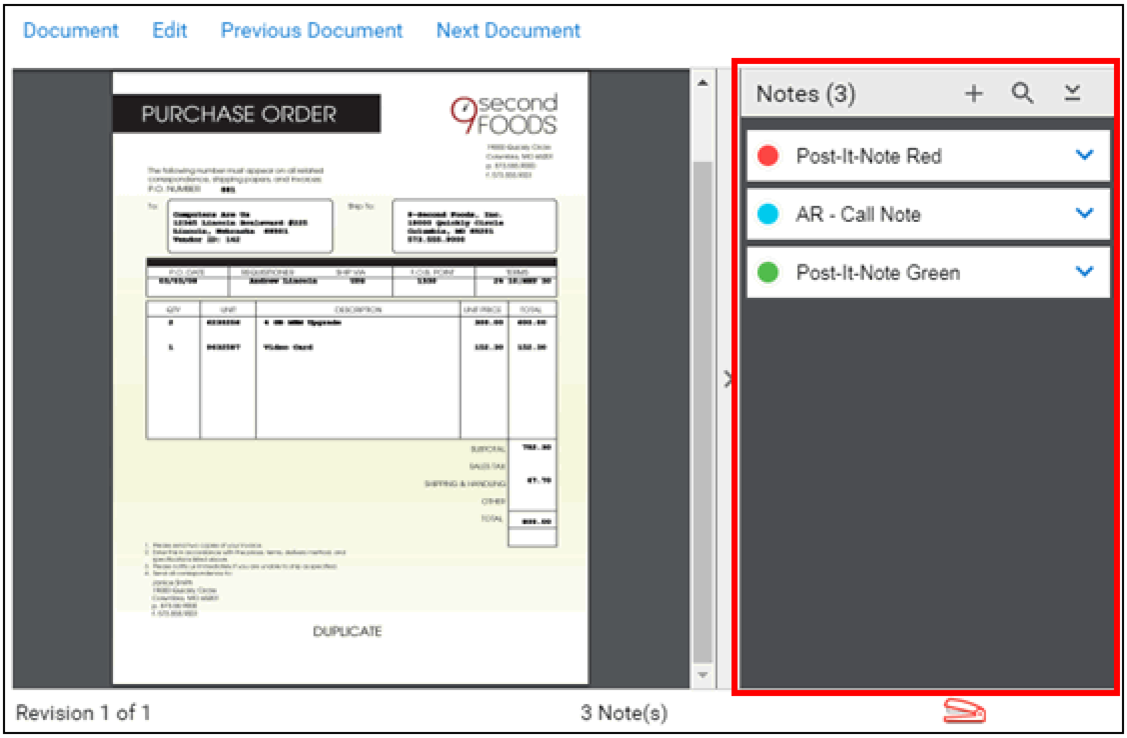
Note Privacy Option	Description
Disallow View	Prohibits all other users from viewing the note. **Note:** If this option is selected, other users can still successfully search for text in the note using the OnBase Client, but they will not be able to view the note.
Disallow Update	Prohibits all other users from editing the note.
Disallow Delete	Prohibits all other users from deleting the note.

4. Click **Save** to save the note to the document and keep the **Notes** dialog box open, or **Save and Close** to save the note and close the **Notes** dialog box.

Notes Pane Viewer for OLE Documents

When viewing a document in the OLE document viewer, the notes on the document are listed in the **Notes** pane of the viewer. The OLE document viewer is used to display OLE documents such as Microsoft Office documents and PDF documents (depending on your configuration).

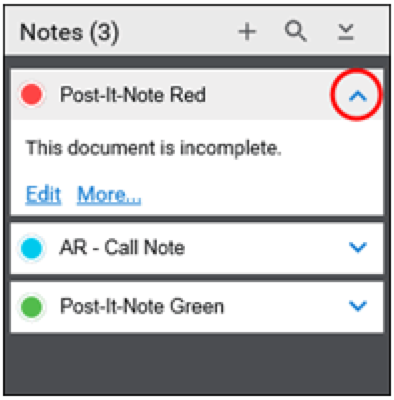
The **Notes** pane displays all of the notes on the document, and each note's color is displayed next to the name of the Note Type. The total number of notes is also displayed in the heading of the pane.



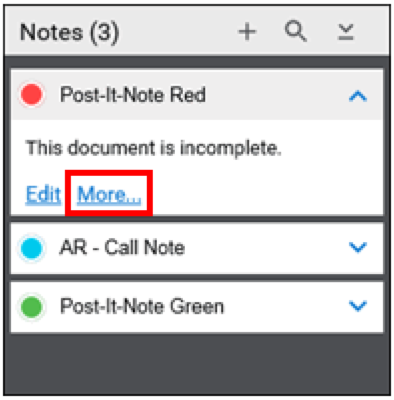
Note: The **Notes** pane only allows you to view the notes on the OLE document. To add, edit, or delete notes, you must use the **Notes** dialog box by clicking **Edit** on a note in the **Notes** pane, or clicking the **Note(s)** section of the status bar. For more information on using the **Notes** dialog box, see Notes Dialog Box on page 169.

The following functions are available in the **Notes** pane of the Document Viewer:

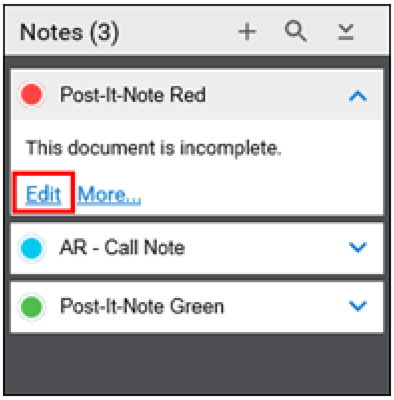
- To expand a note and view its contents, click the note in the **Notes** pane. Click the heading of the note again to collapse the note.



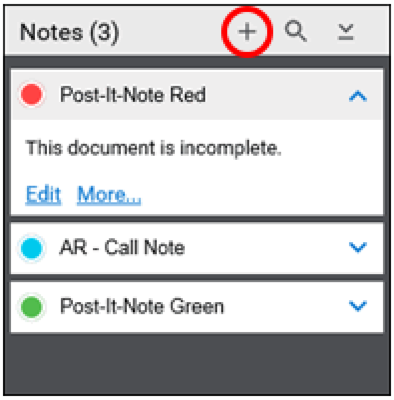
- To view additional information on a note, expand it and then click **More**. The note's icon, creation date and time, and creator's user name are displayed.



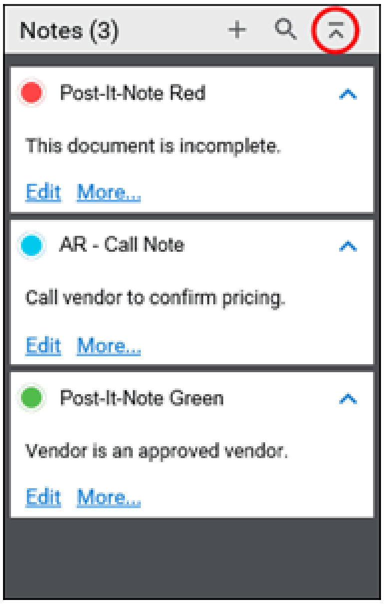
- To edit a note, expand the note and click **Edit**. The **Notes** dialog box is displayed, which allows you to edit the note.



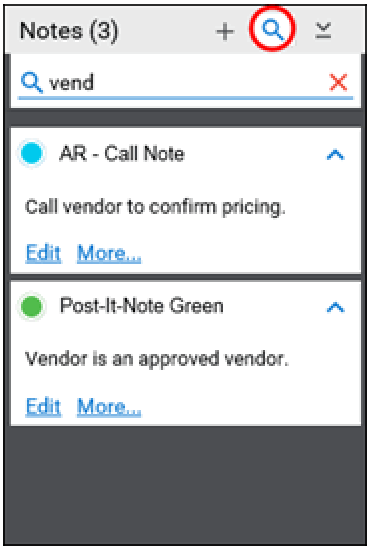
- To add a new note, click the **Add Note** button at the top of the **Notes** pane. The **Notes** dialog box is displayed, which allows you to create a new note.



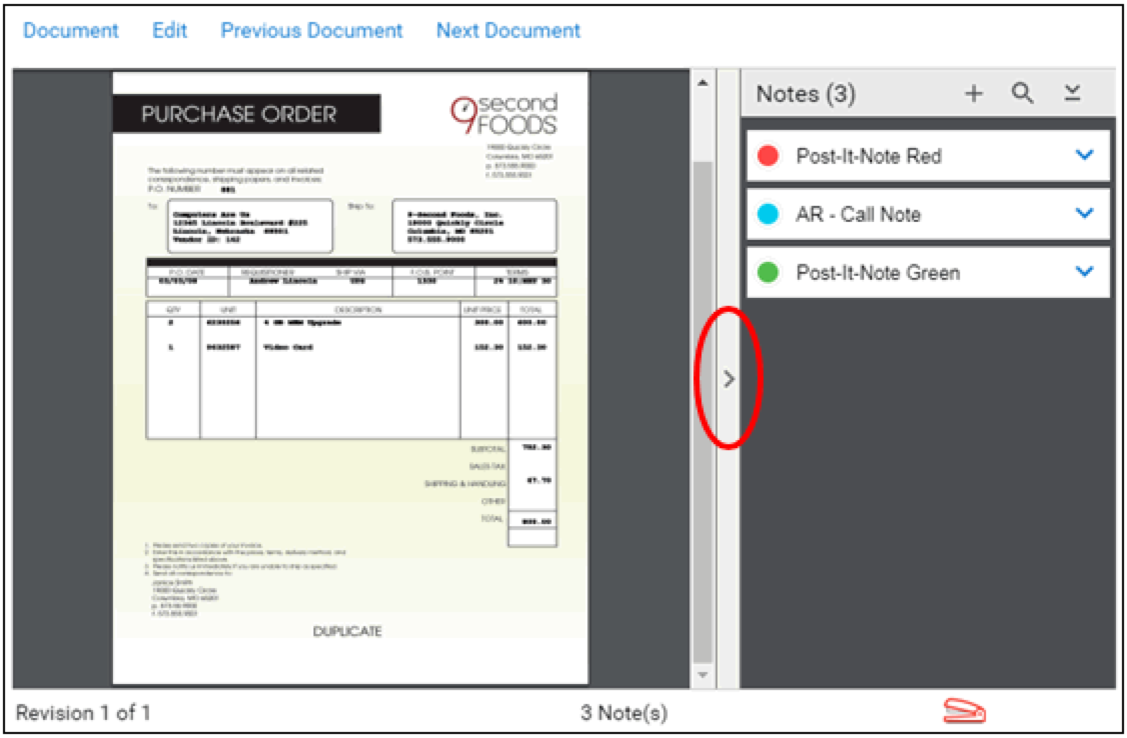
- To expand all notes, click the **Expand All** button at the top of the **Notes** pane. Click the button again to collapse all notes.



- To filter the list of notes, click the filter button at the top of the **Notes** pane and enter search terms into the **Note Text** field. The list is filtered to display only the notes that contain matching text. Click the red **X** to remove the filter.

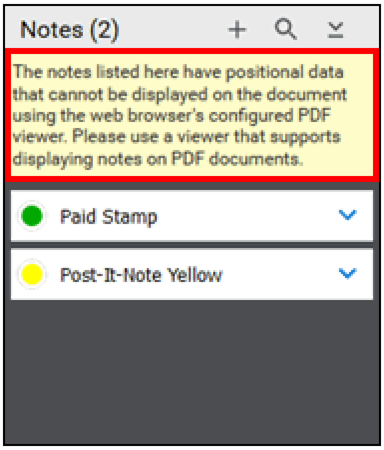


- To hide the **Notes** pane, click the handle next to the pane.



Click the handle again to expand the **Notes** pane.

- If any notes have specific positions on a PDF document, the **Notes** pane contains a notice explaining that the document viewer cannot display the position of these notes on the PDF. To display the positions of notes and note icons on a PDF document, use the Web Client PDF viewer instead of the web browser's PDF viewer. See your system administrator for more information.



Annotations

Annotations are similar to OnBase notes. An annotation can be used to call attention to items in a document, it can contain a message, and it may be represented by an icon. However, annotations also allow you to call attention to a portion of the document with special markings, such as arrows, highlights, and ellipses.

Note: If you are viewing a document that has been locked by Records Management, in the ActiveX environment, the Annotations toolbar is selectable, but does not perform any functions. In the HTML environment, the Annotations toolbar is locked and cannot be used.

When enabled, the Notes toolbar displays annotation-related notes along the bottom of the viewer window.

Characteristics such as color and title are predefined when the note is configured for use. Several types of annotations can be created:

- Arrows typically point to a specific item.
- Ellipses typically circle an area of interest.
- Overlapping Text allows user-defined text to be displayed over the document.
- Highlights place a translucent color over the area of interest.

Redaction annotations can be used to produce an entirely new image document, in which the annotation is permanently applied to the document.

Note: The Arrow, Ellipse, and Overlapped Text note types are not available for use on all documents. Availability depends on the file format of the document.

Annotations Toolbar

The Annotations toolbar provides buttons for adding annotations or redactions to a document. You can show or hide the Annotations toolbar; by default it may be hidden.

For more information, see Creating an Annotation on page 185.

Note: If you are viewing a document that is locked by Records Management, the options on the Annotations Toolbar are selectable, but do not perform any tasks.

You can view, modify, or delete annotations the same way you do notes.

Button	Description
	**Toggle Redaction** lets you draw black or white rectangles over a portion of the document. The color of the redaction is determined by the adjacent drop-down list. You remain in redaction creation mode until you click the **Toggle Redaction** button again. This option is available for image documents only. You must have sufficient privileges to modify the document.
	**Save Redactions** saves any redactions that you have added to the document but not yet saved. You can save redactions only if the following requirements are met: • You have sufficient privileges to modify the current document. • The document is configured to allow redactions. • The document has an image or text report format.
	**Toggle Annotation** enables you to add one or more annotations to the document by selecting the annotation(s) from the adjacent drop-down list of available annotation types. You remain in annotation addition mode until you click the **Toggle Annotation** button again.

Note: Not all File Formats allow annotations. See your system administrator if the **Toolbars | Annotations** right-click option is not available.

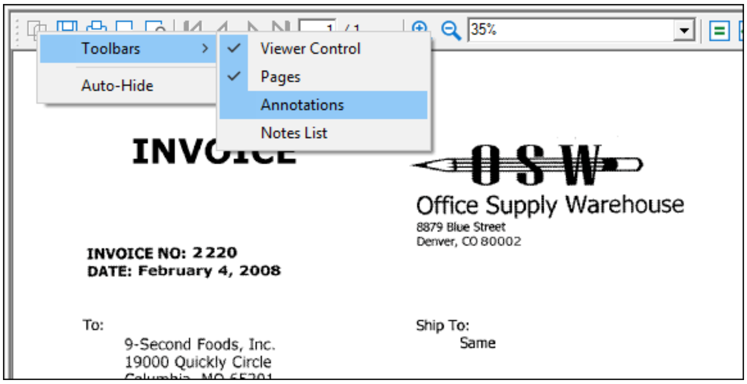
Creating an Annotation

If you have sufficient privileges, you can create annotations on text and image documents using the Annotations toolbar.

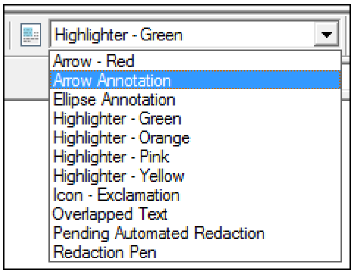
Annotation behavior differs slightly in the HTML Web Client. For more information about working with annotations in these cases, See Creating Annotations in the HTML Document Viewer on page 187.

1. Ensure that the Annotations toolbar is displayed on the Document Viewer.

   If the toolbar is not displayed, enable it by right-clicking the document or the Document Viewer and selecting **Toolbars | Annotations**.



2. In the Annotations toolbar, select the type of annotation from the drop-down list. By default, the drop-down list displays the most recent annotation you applied to a document with the same file format.



Note: Depending on your system's configuration, redaction annotations may be available from the annotations drop-down list. Redaction annotations are not supported for creating permanent redactions in the OnBase Web Client or DocPop. To create a permanently redacted document, see Creating a Redaction on page 190.

Note: You can use redaction annotations to print redacted documents on an ad hoc basis. To remove redaction annotations after printing a document, see Deleting a Note on page 168.

3. Enable the selected annotation by clicking the **Toggle Annotation** button.

Tip: You can also create annotations using the Rubber Band feature if **Draw Annotation On Rubberband** is selected in Viewer Options. When this options is selected, you do not have to click the **Toggle Annotation** button to enable the annotation. To create the annotation using the Rubber Band feature, press **Ctrl** as you click and drag the pointer over the document. For more information, see Options Button - OnBase Viewer Options on page 176.

4. Using the pointer, define the location and size of the annotation by clicking and dragging the pointer over the document. Release the mouse button when finished to display the annotation.

Note: Ensure that the annotation is large enough to be visible. Annotations are required to be a certain size before they can be created and saved.

Creating Annotations in the HTML Document Viewer

The HTML Document Viewer allows you to place annotations on text and image documents.

To create and place an annotation on a text or image document:

1. In the Document Viewer toolbar, select the type of annotation from the drop-down list:

2. Enable the selected annotation by clicking the **Toggle Annotation** button:

3. Using your mouse pointer, define the location and size of the annotation by clicking and dragging the pointer over the document. Release the mouse button when finished to display the annotation.

Note: Ensure that the annotation is large enough to be visible. Annotations are required to be a certain size before they can be created and saved.

Moving and Resizing Annotations in the HTML Document Viewer

If you have appropriate privileges, and if an annotation is configured to be movable, you can move and resize annotations after they have been placed on a document.

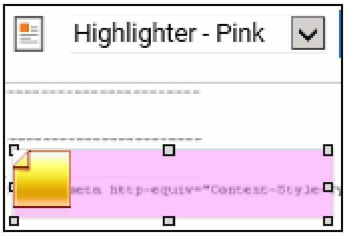
To move an annotation on a document, do one of the following:

- Click and drag the annotation to a new location.
- Double-click the annotation, then use the arrow keys on the keyboard to move the annotation to a new location.

Tip: When using the arrow keys on the keyboard to move an annotation, press and hold the **Ctrl** key while pressing the arrow keys to move the note more quickly.

To resize an annotation on a document, do the following:

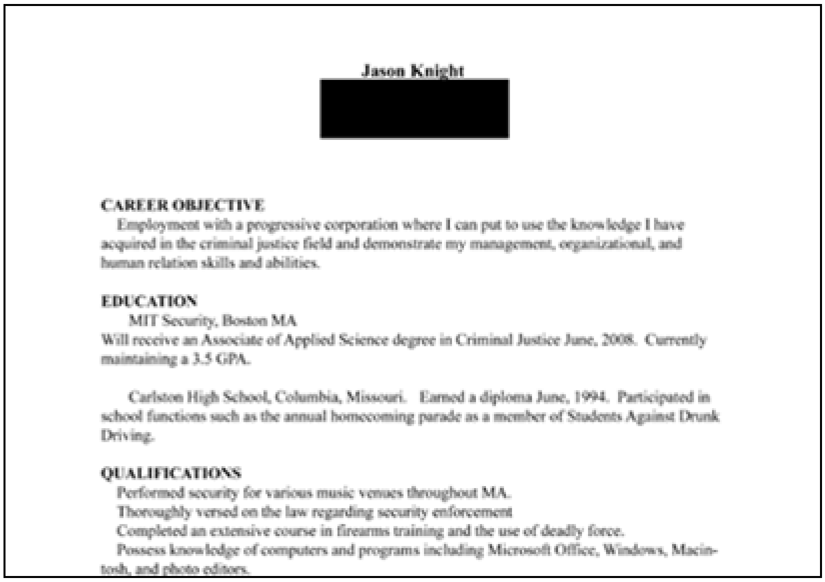
1. In the Document Viewer, double-click the annotation you want to resize. The annotation is selected.



2. Click and drag the edges or corners of the annotation until the annotation is the correct size. The mouse pointer changes to indicate the direction in which the annotation can be resized.
3. When you are finished resizing the annotation, click a different area of the screen to deselect the annotation.

Redactions

A redaction is a special kind of annotation used to hide confidential information on an image or text document. A redaction is a permanent black or white rectangle that obscures an area of the document. Redactions can be added in both HTML and ActiveX environments.



Jason Knight
[redacted]

CAREER OBJECTIVE
Employment with a progressive corporation where I can put to use the knowledge I have acquired in the criminal justice field and demonstrate my management, organizational, and human relation skills and abilities.

EDUCATION
MIT Security, Boston MA
Will receive an Associate of Applied Science degree in Criminal Justice June, 2008. Currently maintaining a 3.5 GPA.

Carlston High School, Columbia, Missouri. Earned a diploma June, 1994. Participated in school functions such as the annual homecoming parade as a member of Students Against Drunk Driving.

QUALIFICATIONS
Performed security for various music venues throughout MA.
Thoroughly versed on the law regarding security enforcement
Completed an extensive course in firearms training and the use of deadly force.
Possess knowledge of computers and programs including Microsoft Office, Windows, Macintosh, and photo editors.

Redactions can be created and saved on image documents, text documents, and Image Rendered PDFs that are part of Document Types configured to allow redactions. See your system administrator to verify whether a Document Type has been configured for redactions.

A redaction cannot be deleted (or undone) once it has been saved. When a redaction is saved, the redacted document is stored either as a new document in another Document Type or as a revision of the current document. How the redacted document is stored depends on your system's configuration.

Note: Depending on your system's configuration, redaction annotations may be available from the annotations drop-down list. These annotations are supported only in the OnBase Client and Unity Client and should not be used for creating permanent redactions in the Web Client.

Caution: If a note, redaction, burned markup, or deficiency is not in the location you expect, do not save or sign the document until the location has been corrected by your system administrator. When the document is saved or signed, the pending redaction, burned markup, or deficiency is permanently placed in the shifted location. The shifting of notes that do not permanently alter the document can be corrected any time by your system administrator.

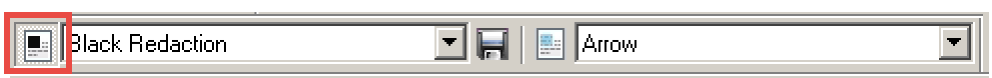
Creating a Redaction

You can apply and save redactions to a document if all of the following conditions are met:

- You have sufficient privileges to modify the document.
- The document’s file type supports redactions. Only image and text files can be redacted.
- The document’s Document Type is configured to allow redactions.

Note: You can print redacted documents on an ad hoc basis even if their Document Types are not configured for redactions. Apply the redactions, and then print the document. Then, close the document without saving the redactions.

1. Click the **Toggle Redaction** button from the Annotations toolbar.



2. From the redaction drop-down list, select whether you want to create a black redaction or a white redaction. If you select **Black Redaction**, the redacted area will be defined by a black, opaque rectangle. If you select **White Redaction**, the redacted area will be defined by a white, opaque rectangle.
3. Using your mouse, define the location and size of the redaction by clicking and dragging the pointer over the area you want to redact. Repeat for each area you want to redact.
4. Save the redacted image by clicking the **Save Redaction** button.
   - OnBase displays the message **Your redaction has been saved successfully**, indicating that the redacted document has been created. Depending on your system’s settings, this redacted document is saved to another Document Type (the original document may also be deleted in this scenario), is saved as a revision of the current document, or replaces the original document.

Note: If your system is configured to save the redacted document as a revision, you may lose annotations or notes that were applied to the original document. See your system administrator for questions regarding redaction settings.

- If OnBase indicates that the redaction could not be saved, the Document Type may not be configured for redactions.
- If the document is closed or refreshed before one or more redactions have been saved, a message box prompts you to **Save Redactions** or **Close**. To save all created redactions, click **Save Redactions**. To discard them, click **Close**.

Note: In the HTML Viewer, if you switch between Overlay and Non-Overlay modes, a message is displayed indicating that the redaction will be removed.

Staples

Documents can be attached to each other using the **Staple** and **Back Stable** Note Types. In most cases, staples are used to associate documents that have an established logical relationship. For example, documents related to a single customer may be stapled together or an invoice and its associated purchase order may be stapled together. Logical relationships between documents can be established by a user but are not required by OnBase to staple documents.

When documents are stapled, a Staple icon is placed on each document. Staple icons can be used to directly open associated documents. Since staples only create a link between documents, the stapled documents remain separate.

Staple icons can also be used to open the staple's note, which displays creation information and allows the addition of customized text.

When using staples, consider the following:

- The Staple icon and staple note are placed on the primary document, and a Back Staple icon and back staple note are placed on secondary documents.
- For documents consisting of multiple revisions, Staple icons appear on all revisions. When viewing a stapled document from any revision of an open document, the latest available revision of the stapled document is displayed.
-
- When printing a document using the HTML Web Client, Staple icons will not be printed when selecting **Note Icon/Annotation on Document** in the **Print Settings**.
- Not all file formats support using staples. See your system administrator to verify whether your document supports using staples.

Working with Staples

Staple behavior differs slightly depending on the type of documents being stapled. Most image documents can stapled from open documents, but certain document types (such as OLE documents or E-Forms) must be stapled using the stapler icon. For information about working with notes in these cases, see Stapling Documents with the Stapler Icon on page 192.

Stapling Documents from Open Documents

To staple one or more open documents to another open document:

1. Open the initial document to which other documents will be stapled.

Note: The initial document cannot be an OLE document or E-Form. To staple an OLE document or E-Form to another document, see Stapling Documents with the Stapler Icon on page 192.

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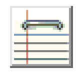
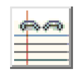
2. Open the secondary document(s) that you want to staple to the initial document.

Note: To staple documents, you must have both images open in separate Document Viewer windows. If you are working with documents in the Web Client, you can right-click a document from a Document Search Results list and select **Open in New Window**.

3. Right-click and drag each secondary document onto the initial document.
   A staple icon is displayed on the primary document.



   A back staple icon is displayed on the secondary document.



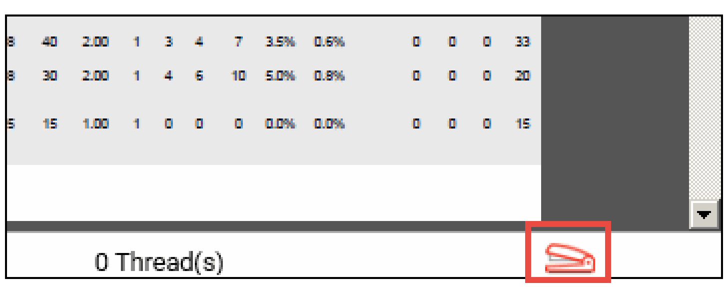
Stapling Documents with the Stapler Icon

The following steps describe how to staple documents using the stapler icon, which is only available in the HTML Web Client and for certain document types (such as OLE documents or E-Forms) in the ActiveX Web Client.

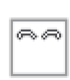
1. Open the initial document to which other documents will be stapled.
2. Open the secondary document(s) that you want to staple to the initial document.

Note: To staple documents, you must have both images open in separate Document Viewer windows. If you are working with documents in the Web Client, you can right-click a document from a Document Search Results list and select **Open in New Window**.

3. Click and drag the stapler icon (located in the status bar) from each secondary document onto to the primary document.

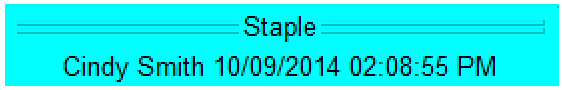


   An icon indicating that the document has been stapled is displayed on all associated documents.



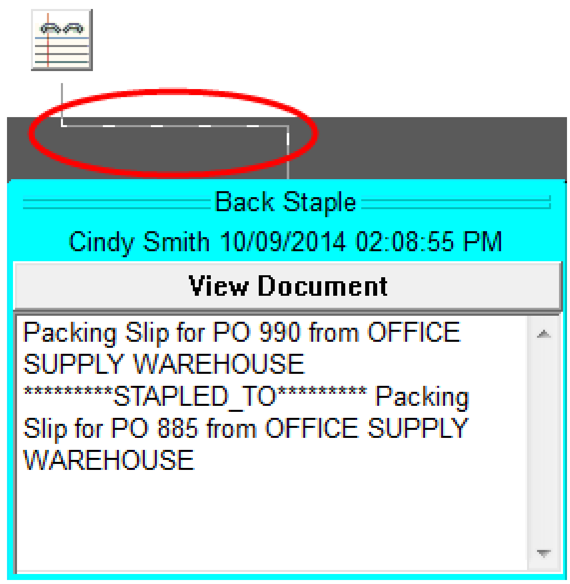
Viewing Stapled Documents

Staple notes are displayed at the bottom of the Document Viewer window as note tabs. A Staple note tab indicates whether the document is the primary document or the secondary document by labeling the note as **Staple** or **Back Staple**, respectively.



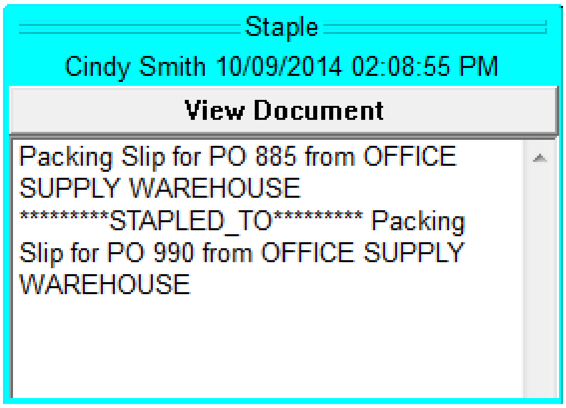
Note: Note labels may vary depending on the Auto-Naming conventions for your system.

When the note is open, a dotted line connects the Staple note tab to the Staple note icon on the document.



To view stapled documents:

1. Click the Staple note tab at the bottom of the Document Viewer window. In the HTML Web Client, double-click the staple note icon on the document. The note window is displayed:

   Staple notes can also be accessed via the **Notes** dialog box.
2. Click the **View Document** button to open the document stapled to the current document.

Moving Staple Notes

To move the Staple note icon on the document, click and drag the icon to the proper place. The new position of the Staple note icon is automatically saved.

Editing Staples

1. Click the Staple note tab at the bottom of the Document Viewer window. The note window is displayed.

   In the HTML Web Client, double-click the staple note icon on the document, or edit the note from within the Notes dialog box.
2. Edit or add any text as needed.

Deleting a Staple

1. Right-click on the staple status bar and select **Delete Note**.

   In the HTML Web Client, select the staple note within the Notes dialog box.

   You are asked if you are sure you want to delete the note.
2. Click **Yes**. The staple is removed.

Note: If you delete a staple on one document, the corresponding staple on the document that was attached to the deleted staple is still displayed. If you do not want the staple on the corresponding document, you must delete it also.