



Folders

Reference Guide

Includes:

Administration Guide

User Guide

Copyright

Information in this document is subject to change without notice. The software described in this document is furnished only under a separate license agreement and may be used or copied only according to the terms of such agreement. It is against the law to copy the software except as specifically allowed in the license agreement. This document or accompanying materials contains certain information which is confidential information of Hyland Software, Inc. and its affiliates, and which is subject to the confidentiality provisions agreed to by you.

All data, names, and formats used in this document's examples are fictitious unless noted otherwise. Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright law, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of Hyland Software, Inc. or one of its affiliates.

Hyland®, Hyland Software®, Hyland Healthcare, and Hyland product names are registered and/or unregistered trademarks of Hyland Software, Inc. and its affiliates in the United States and other countries. All other trademarks, service marks, trade names and products of other companies are the property of their respective owners.

© 2021 Hyland Software, Inc. and its affiliates. All rights reserved.

Document Name Folders
Department/Group Documentation
Revision Number Foundation EP5

OVERVIEW

Definitions	1
File Cabinet	1
Folder Definition	2
Folder Hierarchy	2
Folder Contents	2
Static Folder.....	3
Dynamic Folder.....	3
Using Dynamic vs. Static Folders.....	4
Auto-Foldering	4
Related Folders.....	4

ADMINISTRATION GUIDE

CONFIGURATION

Configuration	7
Navigating Folder Type Configuration	8
Enabling Users to Create Folders.....	9
Folder Type Definition	9
Folder Hierarchy	9
Overview of Configuration Procedures.....	10
File Cabinet Configuration	12
Creating Both a File Cabinet and its Folder Type	13
Configuring Only the Folder Type for a File Cabinet	16
Creating a File Cabinet Only	18
Assigning User Groups to a File Cabinet	19
Renaming a File Cabinet	20
Deleting a File Cabinet	20
Folder Type Configuration	21
Folder Type Settings	24
Usage and Content Settings	24
User Options	26
User Searchable	26
User Creatable	26
User Copyable	26
User Movable	27
Keyword Update Rules for Moved Folders	27
Child Folder Manual Add Options	28
Examples of Child Folder Manual Add Options	29
Auto-Create Options	30
Auto-Create Child Folders	30
Do Not Auto-Create This Folder	30
All Keywords Needed to Auto-Create	31

Only Required Keywords Needed to Auto-Create	31
Auto-Creation and Auto-Foldering	31
Date-Based Folders	32
Folder Notes	33
Folder User Groups	34
Folder Display Options	36
Folder Contents Display Options	37
Icons	38
Document Sort Order	38
Order Child Folders By	39
Order by Folder Type Sequence	40
Order by Keyword Value	40
Child Folder Display Options	41
Normal Display	42
Display Child Folders as Tabs	42
Display Child Folders in a Pop-up List	43
Only Display Child Folders from Search	45
Folder Tabs	46
Required Keyword Types for Folder Types	47
Folder Keyword Types Configuration	49
Cascading Data Sets	51
Folder Keyword Considerations	54
Keyword Considerations for Auto-Foldering	54
Mask Characters	54
Security Keywords	54
Multiple Instances of Keyword Types and Auto-Foldering	54
Intended Results (Two Folders Created)—Document Type contains Multi-Instance Keyword Type Group	55
Unwanted Results —Document Type contains Individual Keyword Types Only	55
Keyword Considerations for Security Keywords	55
Keyword Considerations for Show Folder Locations	55
Folder Auto-Name Configuration	56
Dates	60
Keyword Types	60
Keyword Value Substrings	62
Considerations for Manually Entering Keyword Type and Substring Symbols	63
Renaming Folders by Updating an Auto-Name String	63
Renaming Folder Types and File Cabinets	63
Renaming Folder Types	63
Renaming File Cabinets	65
Folder Filter Configuration	66
Configuring the Custom Query	66
Assigning Filters to Folder Types	68
Related Folder Type Configuration	70
Keyword Type on Starting Folder Has Multiple Values	72

Starting Folder Has Multi-Instance Keyword Type Groups	72
Starting Folder Has Some Blank Keyword Values	72
Starting Folder Has No Related Keyword Values	73
Weekly Folder Settings	74
Folder Templates	75
Creating a New Folder Template	75
Assigning Document Types to a Template	77
Configuring Keyword Type Criteria for a Document Type	79
Configuring a Document Type to Allow for Two or More Unique Values	82
Configuring how Documents are Displayed Using a Template	84
Adding Missing Item Messages	84
Formatting Missing Item Messages	86
Assigning Specific Templates to a Folder Type	87
Assigning a Default Template to a Folder Type	88
Assigning a Fixed Default Template	88
Assigning Default Templates Using Patterns	89
Considerations for Using Template Patterns	94
Assigning User Groups to a Template	95
Copying a Folder Template	96
Deleting a Folder Template	98
Dynamic Folder Type Configuration	100
Dynamic Folders and Multi-Instance Keyword Type Groups	103
Show Folder Locations	104
Folder Notes	106
Configuring Folder Types for Folder Notes	106
Procedure	107
Assigning Users Rights to Configure Folder Note Types	108
Creating Folder Note Types in OnBase Configuration	109
Copying Folder Type Configurations	113
Deleting Folder Types and Folders.....	113
Deleting Folder Types from Configuration	113
Deleting Existing and Orphaned Folders in the Client	114
Auto-Foldering.....	116
Before Beginning Auto-Foldering Configuration	116
Draw an Outline of the Intended Results	116
Example of Intended Results Outline	117
Identify Keyword Types for Organizing Folders and Documents	117
How OnBase Uses Keyword Values When Auto-Foldering	119
How Documents are Auto-Foldered.....	120
Configuring a Folder Structure for Auto-Foldering.....	121
Keyword Types That Affect Auto-Foldering	121
Keyword Types That Do Not Affect Auto-Foldering	121
Overview of Auto-Foldering Configuration	121
Parent Folder Type Configuration.....	123
Configuring Document Type Auto-Foldering	127

Folder Type Configuration	128
Document Type Configuration	133
Auto-Folder Existing Documents	137
Example of Parent - Child and Keyword Relationships for Folder Types	139
Example of an Auto-Foldering Document Type	141
Folder Type Custom Queries	142
Configuration Overview for Folder Type Custom Queries	142
Creating the Folder Type Custom Query.....	142
Configuring Custom Queries - Folder Type Query.....	144
Folder Administration	147
Viewing a Folder's History	147
Filtering a Folder's History	148
Turning Off Folder History Filters	149
Generating a Folder History Report	150
Folder Maintenance	151
Scheduling Folder Purge/Deletion	152
Requirements for Configuring/Executing a Scheduled Folder Purge/Deletion	152
Creating a Scheduled Folder Purge/Deletion Process	152
Schedule Configuration.....	153
Calendar	154
Default Daily Schedule.....	155
Selected Day	156
Specifying Purge Options.....	158
Specifying Delete Orphans Options.....	159
Viewing Scheduled Processes	161
Modifying a Folder Purge/Deletion Scheduled Process	161
Deleting a Scheduled Process	162
Running or Suspending a Scheduled Process	162
Verifying the Scheduler is Running	163
Creating Schedule Templates	164
Calendar	165
Default Daily Schedule.....	166
Selected Day	167
User Group Configuration for Folders.....	169
Assigning Folder Privileges	169
Assigning Product Rights for Folder Notes	171
User Group Configuration for File Cabinets	171
User Group Configuration for Folder Types.....	173
Global Client Settings for Folder Override Privileges.....	174
Folder Feature Support.....	175
Upgrade Considerations	177
Client Upgrade Considerations.....	177
Troubleshooting	178
Folder Differences Between Client Applications.....	178

Duplicate Folders Are Created.....	178
Dynamic Folders Do Not Contain Expected Documents	179
Folders Make Browsers Unresponsive in the Web Client	179
Cannot Restore Default Display for File Cabinets	179
Cannot Select a Parent Folder.....	180
Folder Configuration Tabs and Options Are Unavailable	180
Settings Tab	181
Auto-Name Tab	182
Display Tab	182
Parent Type Tab	182
Related Types Tab	183
Auto-Folder Tab	183
Dynamic Tab	183
Folder Type Cannot Be Deleted.....	183
File Cabinets Window Display Is Not Saved	183
Folder Template Color Tags Are Not Respected	184
Documents Are Not Auto-Foldered.....	184
The Destination Folder is Locked	184
User Has Insufficient Rights to a Parent Folder.....	185
Folders Are Not Displayed in Pop-Up Lists.....	185
Characters Required to Run Query	185
Oracle and Case Sensitivity	185
Style and Formatting Tags	186
Related Folders Cannot Be Found Due to Blank Keywords.....	186
Unable to Complete the Folder Search in Unity.....	186
Certificates of Destruction Are Not Displayed Properly	187

FOLDERS BEST PRACTICES

Definitions	188
Getting Started	189
Assigning Folder Content Options	191
Organizing Folders and Contents by Keywords	191
Keyword Assignment Examples.....	192
Naming Folders Logically.....	193
Choosing Folder Display Options	194
Creating Folders Automatically Using Auto-Foldering	195
Choosing Auto-Folder Keywords.....	195
Using Auto-Foldering and Auto-Creation	196
Deleting Unnecessary and Empty Folders	196
Client Usage.....	197

FOLDER CONFIGURATION WORKSHEETS

Parent Folder Types.....	199
---------------------------------	------------

Folder Tree Configuration	201
Folder Configuration	203
Folder Document Configuration	205

USER GUIDE

USAGE

Usage	208
Using Folders	209
Opening File Cabinets on Startup	209
Working with Folders Overview	210
Advanced File Cabinets Window	210
Navigating the Advanced File Cabinets Window	212
Keyboard Shortcuts	214
Open a Folder and View Documents	214
Open Multiple Documents at the Same Time	215
Displaying Folder Search Upon Clicking a Folder	215
Customizing the Advanced File Cabinets Window	216
Docking and Floating Panes	217
Moving Docked Panes Within the File Cabinets Window	218
Sharing Docking Positions	218
Unpinning Panes	219
Closing Panes	220
Classic File Cabinets Window	221
Open a Folder and View Documents	221
Change File Cabinets Window Appearance	222
Working with Folder Pop-up Lists	223
Retrieving Related Folders	225
Folder Search	226
Folder Search Using the Advanced File Cabinets Window	226
Folder Search Using the Classic File Cabinets Window	228
Folder Type Custom Queries	229
Creating a File Cabinet	230
Creating Folders in the Client	231
If You Cannot Create a Folder	233
Moving Folders in the Client	233
If You Cannot Move a Folder	234
Keyword Value Update Rules for Moved Folders	235
Copying Folders in the Client	235
If You Cannot Copy a Folder	236
Deleting Folders and Documents in a Folder	237
Deleting Documents from Both a Folder and OnBase	237
Deleting Folders	237
Automatically Index Documents Using Folders	238

Clear Selected	239
Applying a Folder Template.....	240
Applying Folder Filters	242
Adding and Removing Documents	243
Adding Documents to Folders	243
Copying or Moving Documents to Folders	244
Importing Documents Using Folders	245
Removing Documents from Folders	245
Filtering the View of Available Folders	246
Advanced File Cabinets Window	246
Classic File Cabinets Window	247
Show Folder Locations	249
Keyword Considerations for Show Folder Locations	249
Working With Folder Keywords	250
Modifying Keyword Values on a Folder Only	250
Modifying Keyword Values on a Folder, Child Folders, and Documents	252
Modifying Multi-Instance Keyword Type Groups	254
Example 1: Content uses the same Multi-Instance Keyword Type Group as its folder	255
Example 2: Content uses a Multi-Instance Keyword Type Group that contains a Keyword Type used by its folder	256
Example 3: Content uses a Keyword Type that is contained in a Multi-Instance Keyword Type Group used by its folder	256
Working with Folder Notes	257
Folder Notes Requirements	257
Creating Folder Note Types	258
Using Notes and Bookmarks on Folders	261
Printing Folder Contents	264
Folder Properties.....	265
Folder Options in the Client	267
Folder Right-Click Options and Available Features	267

OnBase folders allow users to view and organize documents electronically, as they would with a folder of paper documents, but with the added benefits and security of OnBase. Users can access related documents in a way that is familiar, logical, and easy to use. Folder structures can be automatically created and populated based on business needs without user interaction.

OnBase folders allow users to store a document once and retrieve it from a familiar folder interface that can be configured to a department's or user's need. Because each document can reside in multiple folders, departments that prefer different folder structures can access the same document in different locations. Because there is only one actual document, changes to the document are reflected in all locations, even when the document resides in many folders.

Both folder creation and population can be automated to ensure that the folder structure is maintained and file sorting is accurate. This automation protects against accidental folder creation or documents being misfiled. Existing folders can help automate indexing, as external documents that are dragged and dropped onto the folders window can inherit folder Keyword Values.

OnBase folder security ensures users see only what they need to see. You can design multiple file cabinets to meet different departments' needs and grant users access based on department membership. When users access folders, they will see only file cabinets and folders that apply to them. OnBase Document Type security also remains applied at the folder level. If users access folders containing restricted documents, the users can see only documents that they are allowed to view. This layering of security lets you create a single folder to be accessed by users who have different Document Type privileges.

Definitions

The following topics describe common folder-related terms and concepts.

File Cabinet

A file cabinet is the highest organizational unit in a folder hierarchy. The file cabinet helps organize folders for easy retrieval. You can place OnBase folders into different cabinets just as you would physically with paper folders.

To open file cabinets in the OnBase Client, select **File | Open | File Cabinets**, or click the **Open File Cabinet** button from the Client toolbar.

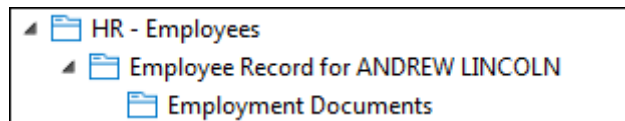
Folder Definition

Folders provide an additional interface for grouping documents for easy retrieval. This interface consists of file cabinets that contain folders.

- Each folder is based on a Folder Type. Folder Types determine a folder's setup, which includes the documents it can contain, whether documents are pulled into the folder automatically, and the folder's Keyword information.
- Folders are assigned Keyword Types by your system administrator. You can search for folders by Keyword Value.
- A folder can contain documents from multiple Document Types.
- A document can reside in multiple folders. Because the document resides in OnBase, it retains all permissions, properties, Keyword Values, document handle, and right-click menus (among other features).
- Folders can be configured to automatically store documents based on Keyword Values as they enter OnBase.
- You may be able to manually drag and drop documents into folders in the OnBase Client. COLD, DIP or Document Imaging can further automate this process.
- Depending on your privileges and how Folder Types are configured, you can create and delete folders and change their Keyword Values.

Folder Hierarchy

A folder's position in the folder tree is defined by its parent-child relationships. A folder that contains other folders is a parent folder. The folders residing within a parent are called child folders. Child folders can also be parent folders to the folders they contain.



In the illustration above, a folder named HR - Employees is the parent to the Employee Record for ANDREW LINCOLN folder, which is the parent to the Employee Documents folder. The Employee Documents folder is the child to Employee Record for ANDREW LINCOLN, and Employee Record for ANDREW LINCOLN is the child to HR - Employees. Notice Employee Record for ANDREW LINCOLN is both a parent and a child folder, depending on the context.

Folder Contents

Folders are classified based on their contents, which can be static, dynamic, or both. A static folder's contents must be manually added or removed from the folder. A dynamic folder's contents are automatically added based on common Keyword Values assigned to the folder. File cabinets can contain a combination of both static and dynamic folders. To determine whether a folder is static, dynamic, or both, check the status bar at the top of the folder window. For more information about static and dynamic folders, see their definitions later in this section.

Static Folder

Static folders allow users to manually add and remove documents as needed for a custom organizational hierarchy.

- You can add OnBase documents to a static folder using the OnBase Client, Web Client, and Unity Client.
- Adding a document to a folder does not physically move the document. Rather, the folder provides another way for users to easily access the document.
- You can drag documents from outside of OnBase into a folder using the OnBase Client.

Documents imported using this method can be automatically indexed with the static folder's Keyword Values, provided that the folder's Keyword Types also exist on the Document Type.

- Documents residing in a static folder do not have to share the same Document Type or Keyword Values.

Dynamic Folder

Dynamic folders allow users to automatically store documents in folders based on Keyword Values.

- A dynamic folder contains all documents that match specified Keyword Value criteria and Document Types. Whenever the folder is opened, its contents are updated automatically.
- Documents that are automatically pulled into a dynamic folder are not physically moved. The folder just provides another way for users to easily access the document.
- For documents to be added manually to a folder from within OnBase, the Folder Type must be static or both static and dynamic.

If a folder is both static and dynamic, documents containing Keyword Values not matching the folder Keyword Values can be added manually. If a folder is dynamic only, documents cannot be manually placed in or removed from the folder from within OnBase.

- You can drag documents from outside of OnBase into a folder.

Documents imported using this method can be automatically indexed with the dynamic folder's Keyword Values, provided that the folder's Keyword Types also exist on the Document Type. You can change these values in the **Import Document** dialog box, but if you change a Keyword Value the folder uses to dynamically store the document, then the document will not be dynamically stored in the folder. If the folder can contain static contents, then the document will be statically stored in the folder.

Using Dynamic vs. Static Folders

Dynamic folders provide a predictable and organized approach to controlling which Document Types appear in a folder. Use a dynamic Folder Type if the folder should contain only documents that share the dynamic Keyword values assigned to that folder.

When a folder is dynamic only (as opposed to both static and dynamic), users cannot place documents manually into the folder from within OnBase, nor can they remove documents from the folder. When a dynamic folder is opened, documents are pulled into the folder through a dynamic database query for what should be in the folder, in real time.

Static folders let you group documents that don't share Document Type or Keyword Values. Users can manually add any document to a static folder, and placing it alongside the folder's existing contents. There is no relationship between any Keyword Values assigned to the folder and those assigned to the folder's documents. Any document that has been dropped into a static folder can also be removed from the folder.

As a best practice, dynamic folders should be used whenever possible. Static folders should be used only when a business need requires documents to be statically stored in the folder.

Note: A document can reside in as many folders as necessary. If a document resides in multiple folders, each instance of the document refers to one and only one document stored in OnBase. Any notes or annotations on the document are displayed on each instance of the document.

Auto-Foldering

Auto-foldering can automatically create OnBase folders when documents are imported or created in Document Types that are set up for auto-foldering. Re-indexing, modifying Keyword Values, and updating AutoFill Keyword Set information will also create auto-folders if the Document Type is properly configured.

Auto-foldering should be used for folder creation whenever possible, because it removes the need to manually create folders and reduces the potential for human error. Auto-foldering also helps ensure that folder structures are consistent and logical.

If a folder is dynamic or static and dynamic, then all documents that meet the folder's dynamic criteria are pulled into the folder.

Related Folders

Related folders are OnBase folders that belong to specific Folder Types and share one or more common Keyword Values with the folder you are viewing. Related folders are not available for every folder. The Folder Type relationships and the Keyword Types that define them are set up in OnBase Configuration.

Related folders allow you to quickly access related information stored in different parts of the folder hierarchy. For example, suppose your folder system has customer claims and customer policy information stored in different branches of the folder tree. If the policy folders are designated as related to the claim folders, then you can access each customer's policy folder directly from the claim folders.

Note: Related folders are not available from the classic Folder Types window.



Folders

Administration Guide

Configuration

This section provides instruction for configuring the following items:

- **File Cabinets** - File cabinets must be configured before users can access folders in the OnBase Client. See [File Cabinet Configuration on page 12](#)
- **Folder Types** - See [Folder Type Configuration on page 21](#) for information about configuring Folder Types, including Keyword Type assignment and display options.
- **Folder Templates** - Folder templates help manage the view of folder contents. Document Keyword Values are checked against the template's Keyword Values, and only documents with Keyword Values that match template values are displayed. For configuration information, see [Folder Templates on page 75](#).
- **Folder Filters** - Folder filters help users quickly find the documents by filtering and organizing the folder contents. For configuration information, see [Folder Filter Configuration on page 66](#).
- **Related Folders** - Related folders allow users to quickly access related information stored in different parts of the folder hierarchy. For configuration information, see [Related Folder Type Configuration on page 70](#).
- **Auto-Foldering** - Auto-foldering provides the ability to automatically file documents into a folder structure in OnBase based on document Keyword Values. For configuration information, see [Auto-Foldering on page 116](#).
- **Folder Type Custom Queries** - OnBase Custom Queries allow users to retrieve folders across multiple Folder Types. Results are displayed in a sortable list, which allows users find folders quickly. HTML Custom Queries can be used to provide a simple custom interface for folder retrieval.

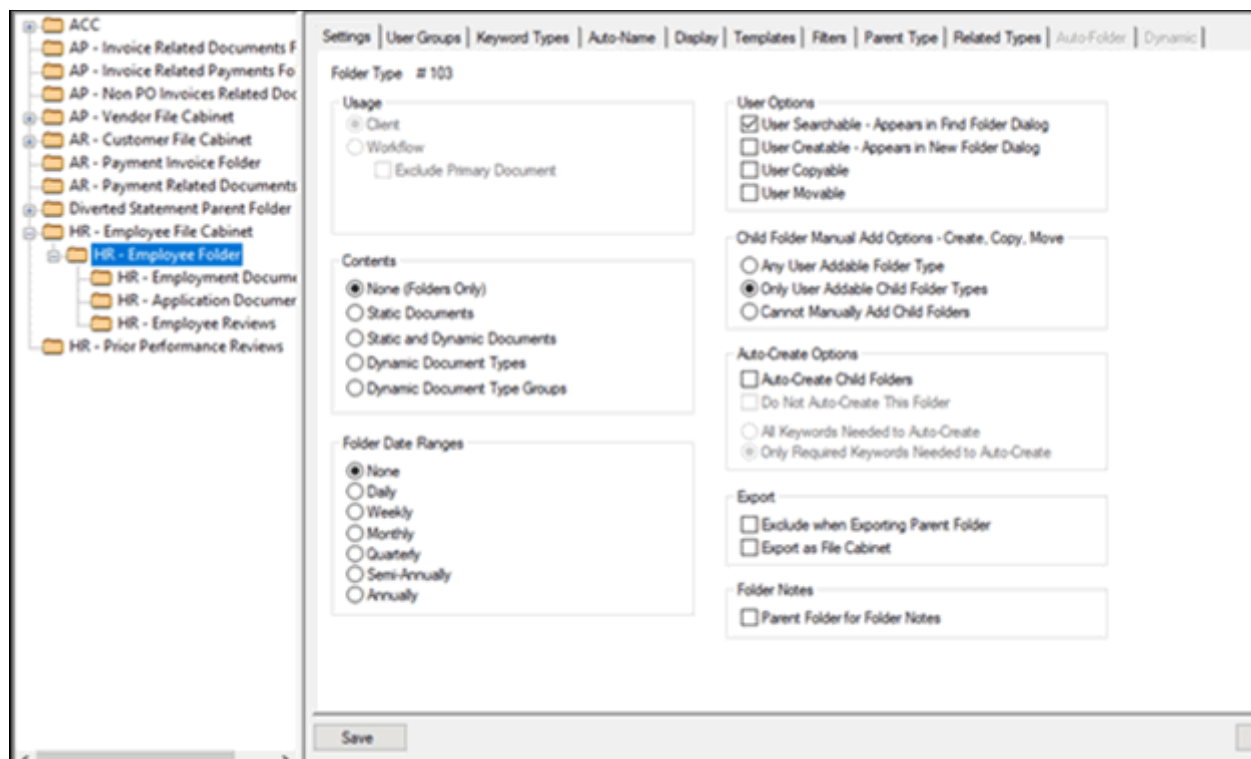
Additionally, the following topics provide information on administering and troubleshooting folders.

- **Folder Administration** - This topic provides information on administering folders in the OnBase Client, including how to view a folder's history and delete folders from Folder Maintenance. See [Folder Administration on page 147](#).
- **Troubleshooting** - This topic provides information on addressing possible issues with folders and their configuration. See [Troubleshooting on page 178](#).

Note: Some folder configuration options are not supported in the OnBase Web Client. For information about where folder configuration options are available, see [Folder Feature Support on page 175](#).

Navigating Folder Type Configuration

The tabbed **Folder Type** configuration dialog box provides the ability to see the relationships between Folder Types and to configure all settings from one location. You can access this dialog box in the Configuration module by selecting **Document | Folder Types**.



The folder tree pane shows existing Folder Types and their relationships.

- To quickly expand all the branches in a tree, select the top-level Folder Type, right-click, and select **Expand Tree**.
- To close all the folders in the tree, select the top-level Folder Type, right-click, and then select **Collapse Tree**.

Define relationships between Folder Types by creating new Folder Types within other Folder Types in the folder tree. You can also define these relationships from the **Parent Type** tab in the right pane. Both methods instantly update the folder tree to reflect the relationship.

The right pane provides a tabbed display of the configuration options available for the selected Folder Type. These tabs organize Folder Type configuration into logical tasks, such as assigning Keyword Types to a Folder Type and defining how folders are displayed in the OnBase Client and other applications. When you modify a Folder Type's configuration, the title bar displays an asterisk (*) next to the Folder Type name to indicate that there are unsaved changes.

Depending on a Folder Type's configuration, specific configuration options become available or unavailable to indicate which are allowed for your particular configuration. For information about when specific options are unavailable, see [Folder Configuration Tabs and Options Are Unavailable on page 180](#).

Enabling Users to Create Folders

Before users can create and use folders, you must configure a file cabinet to store the folders, and then the Folder Types to base them on.

Users also must have sufficient folder privileges. See [User Group Configuration for Folders on page 169](#).

Folder Type Definition

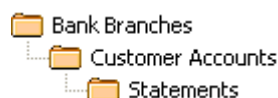
Folder Types are models on which all folders or file cabinets are based. A Folder Type contains characteristics inherited by all folders or file cabinets created from it. Folder Types should be designed differently depending on whether they are for a folder or a file cabinet.

- **Folder Types for Folders** control whether the folders are static or dynamic, which Keyword Types will be applied, and whether the folders are created using auto-folding.
- **Folder Types for a File Cabinet** have fewer characteristics and should be static.

Tip: Folder Types are to folders as Document Types are to documents.

Folder Hierarchy

When configuring Folder Types, you are creating a model for folder trees in the OnBase Client. A folder's position in a tree is defined by the parent-child relationships among the configured Folder Types. A Folder Type that contains other Folder Types is a parent. Folder Types residing within a parent Folder Type are called child Folder Types. Child Folder Types are also parents to any Folder Types they contain.



In the illustration above, a Folder Type named Bank Branches is the parent to the Customer Accounts Folder Type, which is the parent to Statements Folder Type. The Statements Folder Type is the child to Customer Accounts, and Customer Accounts is the child to Bank Branches. Notice Customer Accounts is both a parent and a child Folder Type, depending on the context.

When folders based on these Folder Types are created in the OnBase Client, the same parent-child relationships define their positions in a folder tree.

Overview of Configuration Procedures

The following procedures describe how to configure file cabinets and Folder Types. File cabinets and Folder Types must be configured before users can create folders.

Tip: Always design a folder hierarchy on paper before working in the Configuration module. When designing your folder structure, think of the folders in terms of the keywords they will use. Keywords are used to categorize, index, and auto-folder documents.

1. Designate an administrative super-user who can access all Folder Types for maintenance purposes. Choose a user account other than MANAGER.
A super-user is helpful in several folder configuration scenarios. For example, if a user tries deleting a parent folder but lacks rights to a child folder, the user won't be able to delete the parent folder and won't know that there are child folders underneath.
2. Create the file cabinet. See page 12.
3. Configure a Folder Type for the folders that will reside in the file cabinet. See page 21.

Note: Folder Types are based on whether the folder should be static, dynamic or static and dynamic. Understand these classifications before beginning configuration; you must apply one or more to your Folder Types.

4. Configure Keyword Types. See page 49.
5. Configure the Auto-Name. See page 56.
6. Configure display options. Display options determine how folders and their contents are displayed to users. See page 36.
7. If the Folder Type's contents are **Static** only, you are finished with the Folder Type Configuration. Click **Close**.
If the Folder Type's contents are dynamic (**Dynamic Document Types**, **Dynamic Document Type Groups** or a combination of **Static** and **Dynamic**), you must configure additional dynamic parameters. See page 100.
8. Create as many Folder Types as necessary for the folders in your file cabinet. File cabinets can contain folders of many different Folder Types. For example, folders based on static Folder Types and folders based on dynamic Folder Types can reside in the same file cabinet. See page 21.

Note: One Folder Type can be the model for multiple file cabinets or multiple folders, if they all share the same Folder Type characteristics.

9. Optionally, configure any filters or templates. See page 66 and page 75.
10. Optionally, set up any related Folder Types. See page 70.
11. Optionally, configure your folder system for folder notes. See page 106.
12. Create Custom Queries to retrieve folders. See page 142.
13. Configure User Group Privileges for Folder Types. See page 169.

14. Open the OnBase Client and create your folders.

Note: Auto-folding allows OnBase to automatically create folders based on Keyword values of imported documents. See the [Auto-Folding on page 116](#).

File Cabinet Configuration

File cabinets are the highest level in the folder structure. All folders must reside in a file cabinet.

File cabinets are considered top-level folders and must be based on a Folder Type. Name the Folder Type and the file cabinet in a way that clearly reflects their 1:1 relationship (i.e., that the file cabinet is based on the Folder Type).

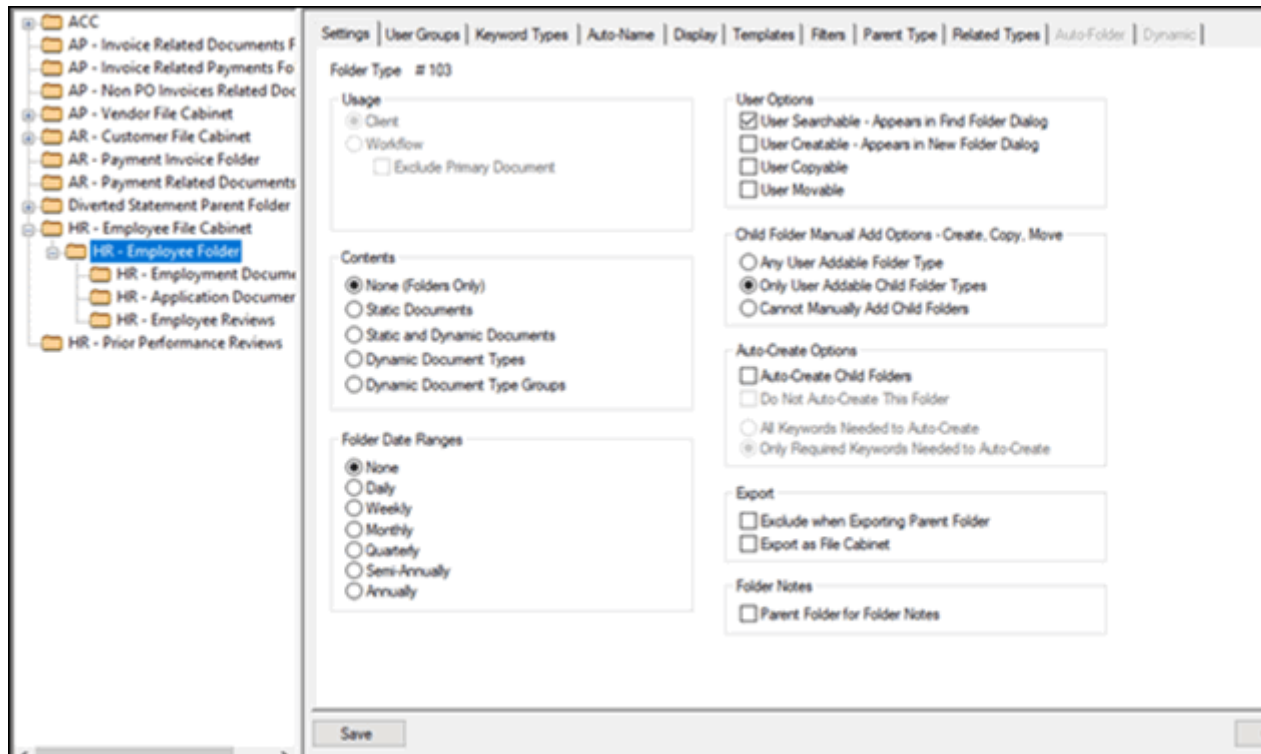
There are two ways to configure a file cabinet and its Folder Type:

- Simultaneously through the Folder Type configuration dialog box (**Document | Folder Types**). See page 13 for details
- Separately by first configuring the Folder Type for the file cabinet (**Document | Folder Types**), and then configuring the file cabinet (**Document | File Cabinets**). See [Configuring Only the Folder Type for a File Cabinet on page 16](#) and [Creating a File Cabinet Only on page 18](#).

Creating Both a File Cabinet and its Folder Type

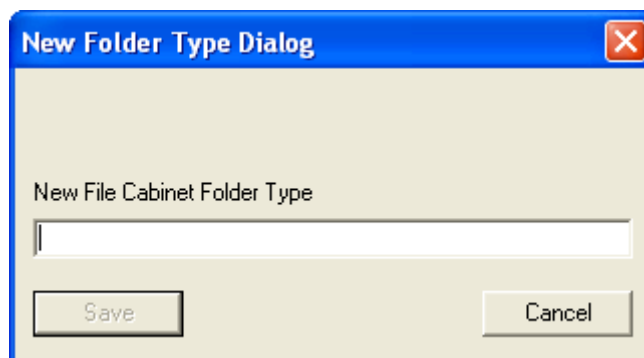
The following procedure describes how to create a file cabinet and its Folder Type at the same time.

1. In OnBase Configuration, select **Document | Folder Types**. The **Folder Type** configuration dialog box is displayed:
 - The left pane contains the folder tree, which displays previously configured Folder Types and their parent/child relationships.
 - The right pane contains all available configurable settings for a Folder Type.



2. Right-click the folder tree background and select **New File Cabinet**.

3. The **New Folder Type** dialog box is displayed. In the field provided, type the name of the new Folder Type.

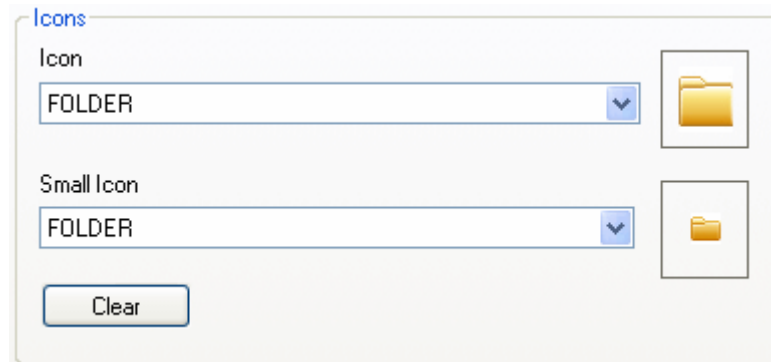


- When you create a file cabinet this way, the name entered for the Folder Type is also used for the file cabinet. If you rename the Folder Type after creating the file cabinet, the file cabinet's name remains the same. To rename the file cabinet, see [Renaming File Cabinets on page 65](#).
 - Use a name that reflects the types of documents the file cabinet will contain. Ensure the naming convention indicates that this Folder Type is for a file cabinet.
For example, if the file cabinet will contain insurance policies, name the Folder Type **INS - Policies File Cabinet**. These naming conventions will make it easier to manage a folder structure containing many Folder Types and file cabinets.
4. Click **Save**. The new Folder Type is selected and ready for configuration.
 5. Select the new Folder Type, right-click and select **File Cabinets** to see the file cabinet that corresponds to the Folder Type.
 6. Select the file cabinet and click **User Group**.
 7. Select User Group(s) from the **Available Groups** list and click **Add** to move them to the **Selected Groups** list. User Groups in the **Selected Groups** list will be able to access the file cabinet from the Client and perform all actions configured for the Folder Types inside the file cabinet.

Note: To access the file cabinet, User Groups must be assigned to both the file cabinet and the corresponding Folder Type. When a file cabinet is created using this method, the User Groups you add to the Folder Type before clicking **Save** are assigned to both the file cabinet and the Folder Type. If you later change the User Groups assigned to the Folder Type, then you must select the **Apply User Group Setting to File Cabinet** option to propagate your changes to the file cabinet. Otherwise, you can change the file cabinet's User Group assignment manually using the **File Cabinet** dialog box.

Tip: Only the file cabinet(s) based on the selected Folder Type are displayed when you right-click and select **File Cabinets**. To see all file cabinets in OnBase, select **Document | File Cabinets**.

- Click the **Display** tab. Under **Icons**, select an image to represent the file cabinet or folders based on this Folder Type. Select the same image from the **Icon** and **Small Icon** drop-down lists.



The screenshot shows a configuration window titled "Icons". Inside, there are two sections: "Icon" and "Small Icon". Each section has a dropdown menu currently displaying "FOLDER" and a corresponding preview box to its right showing a yellow folder icon. At the bottom of the window is a "Clear" button.

- Click **Save** when finished. Do not configure any additional items for a file cabinet.

Configuring Only the Folder Type for a File Cabinet

For each file cabinet, you must configure a unique Folder Type to base it on. This Folder Type is required so that OnBase can build the folder structure. Follow this procedure to configure the file cabinet and its Folder Type separately.

Tip: To create both the file cabinet and its Folder Type in a single procedure, see [Creating Both a File Cabinet and its Folder Type on page 13](#).

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

The screenshot shows the 'Folder Type' configuration dialog box in OnBase Configuration. The left pane displays a folder tree with 'HR - Employee Folder' selected. The right pane shows the configuration settings for Folder Type #103. The settings are organized into several sections: Usage (Client selected), Contents (None - Folders Only selected), Folder Date Ranges (None selected), User Options (User Searchable, User Creatable, User Copyable, and User Movable are checked), Child Folder Manual Add Options (Only User Addable Child Folder Types selected), Auto-Create Options (Do Not Auto-Create This Folder selected), Export (Exclude when Exporting Parent Folder and Export as File Cabinet are checked), and Folder Notes (Parent Folder for Folder Notes is checked). A 'Save' button is located at the bottom of the dialog.

This dialog box contains two panes:

- The left pane contains the folder tree, which displays previously configured Folder Types and their parent/child relationships.
- The right pane contains all available configurable settings for a Folder Type.

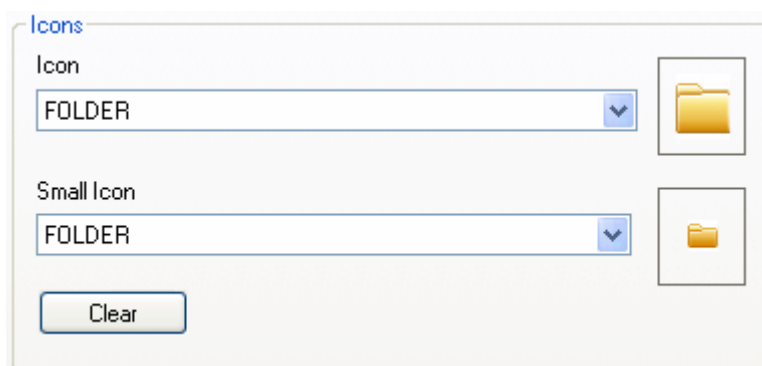
2. Right-click the folder tree background and select **New Workflow Folder**.
3. In the **New Folder Type Name** field, type the name of the new Folder Type.

Tip: Use a name that reflects that the Folder Type is for a file cabinet. For example: **Human Resources File Cabinet** or **Human Resources FC**.

4. Click **Save**.

5. The **Settings** tab is displayed.
 - a. Under **Usage**, select **Client**. For Workflow or Records Management configurations, see the Workflow or Records Management documentation.
 - b. Under **Contents**, select **Folders Only**.
6. Click the **User** tab. Assign one or more User Groups to the Folder Type.

In addition, you must also assign the rights for users to view folder documents. Ensure Document Types and User Groups & Rights are appropriately configured for users who need access to folder documents.
7. Click the **Display** tab. Under **Icons**, select an image to represent the file cabinet or folders based on this Folder Type. Select the same image from the **Icon** and **Small Icon** drop-down lists.



The screenshot shows a configuration window titled "Icons". Inside, there are two sections. The first section is labeled "Icon" and contains a dropdown menu with "FOLDER" selected, followed by a small blue arrow icon. To the right of this dropdown is a preview of a yellow folder icon. The second section is labeled "Small Icon" and also contains a dropdown menu with "FOLDER" selected, followed by a small blue arrow icon. To the right of this dropdown is a preview of a smaller yellow folder icon. At the bottom of the window is a "Clear" button.

8. Under **Child Folder Display Options**, select how folders should be displayed when a user opens the file cabinet. For information about these options, see [Child Folder Display Options on page 41](#).

Note: Don't configure any Keyword Types, Auto-Name strings, or parents for Folder Types that will be used as file cabinets. Keyword Types serve no purpose on file cabinets because users won't retrieve file cabinets using keyword searches. Auto-Name strings are also unnecessary because they are overridden by the name of the file cabinet. No parent should be assigned to a file cabinet Folder Type because file cabinets are the top level of the folder tree.

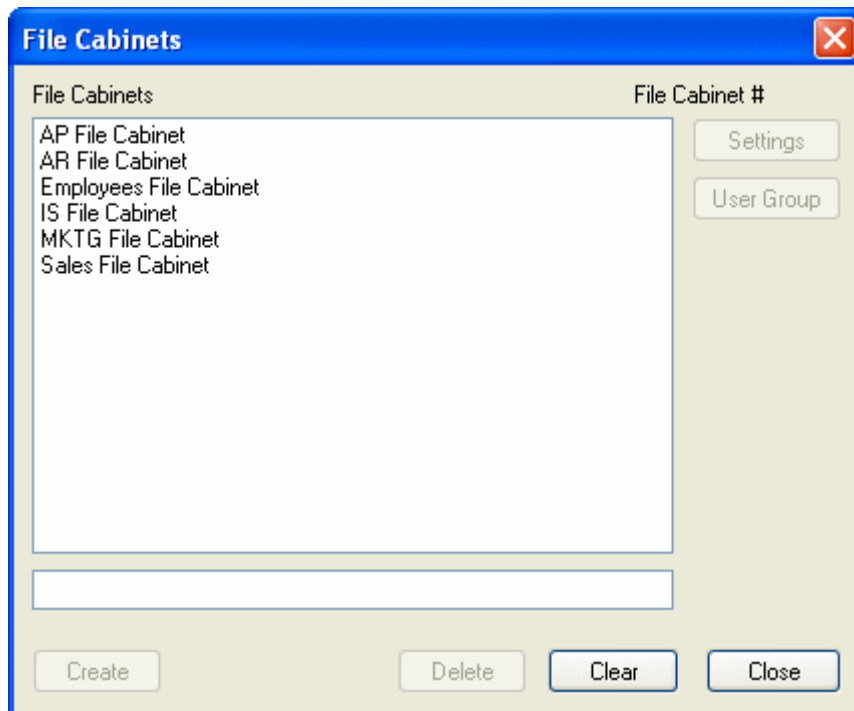
9. Click **Save** when finished. No further configuration is required for the file cabinet Folder Type.
10. Create the file cabinet and associate it with the new Folder Type. See [Creating a File Cabinet Only on page 18](#).

Creating a File Cabinet Only

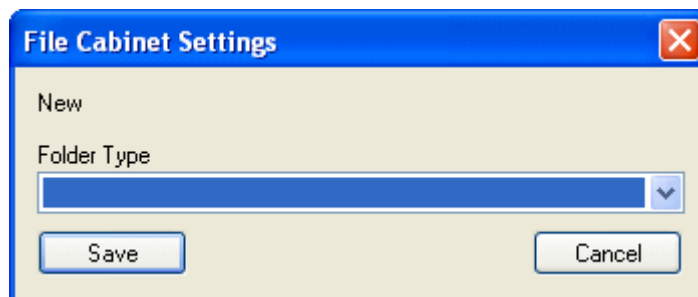
Use the following steps to create a file cabinet and assign it to a Folder Type.

Note: Before creating a file cabinet, you must create its Folder Type. See [Configuring Only the Folder Type for a File Cabinet on page 16](#).

1. In OnBase Configuration, select **Document | File Cabinets** to open the **File Cabinets** dialog box.



2. Type the file cabinet's name in the field provided.
3. Click **Create**. The **File Cabinet Settings** dialog box is displayed.



4. Under **Folder Type**, select the Folder Type created for the file cabinet. This Folder Type must have no parent Folder Types.

5. Click **Save**.

Note: Once a file cabinet is associated with a Folder Type, the Folder Type's **Parent Type** tab is unavailable and the parent Folder Type assignment is ignored. When the file cabinet is deleted, the **Parent Type** tab is available and the parent Folder Type assignment is restored.

6. You are prompted to assign User Group access to the file cabinet. Select User Groups from the **Available Groups** list and click **Add** to move them to the **Selected Groups** list. These User Groups can access the file cabinet in the Client.
7. Click **Close** to save the setting.
8. Continue to define the Folder Types and folder structure for the file cabinet.

Tip: From the Folder Types Configuration dialog box tree view, you can select a Folder Type, right-click and select **File Cabinet** to see the file cabinet to which the Folder Type is assigned. You can also modify the User Groups assigned to a file cabinet from that location.

Assigning User Groups to a File Cabinet

Complete the following procedure to control User Group access to a specific file cabinet. To grant a User Group access to a file cabinet, you must assign the User Group access to both the file cabinet and the Folder Type on which the file cabinet is based.

1. In Configuration, select **Document | File Cabinets**. The **File Cabinets** dialog box is displayed.

Tip: If you know the file cabinet's Folder Type, you can also select the Folder Type from the **Folder Type** dialog box, right-click, and select **File Cabinets**.

2. Select the file cabinet and click **User Group**.
3. Select User Groups from the **Available Groups** list and click **Add** to move them to the **Selected Groups** list. To revoke a User Group's access to the file cabinet, select the User Group from **Selected Groups** and click **Remove**.
4. Click **Close**.
5. Click **Close** to close the **File Cabinets** dialog box.
Now assign the same User Groups to the file cabinet's Folder Type.
6. Select **Document | Folder Types**.
7. Select the Folder Type on which the file cabinet is based.
8. Click the **User Groups** tab.
9. Add the User Groups you assigned to the file cabinet.
10. Click **Save**.

Renaming a File Cabinet

File cabinets are displayed using the names configured in the **File Cabinets** dialog box in OnBase Configuration. You cannot rename a file cabinet by modifying its Folder Type's Auto-Name string.

To rename a file cabinet, see [Renaming File Cabinets on page 65](#).

Deleting a File Cabinet

You can delete a file cabinet from the **File Cabinets** dialog box. This procedure does not delete the Folder Type on which the file cabinet is based, so other file cabinets based on the Folder Type are not affected.

1. In OnBase Configuration, select **Document | File Cabinets** to open the **File Cabinets** dialog box.
2. Select the file cabinet and click **Delete**.
3. Click **Yes** when prompted.
4. Click **Close** to exit the **File Cabinets** dialog box.

Folder Type Configuration

Folder Types must be configured before users can use file cabinets and folders within OnBase.

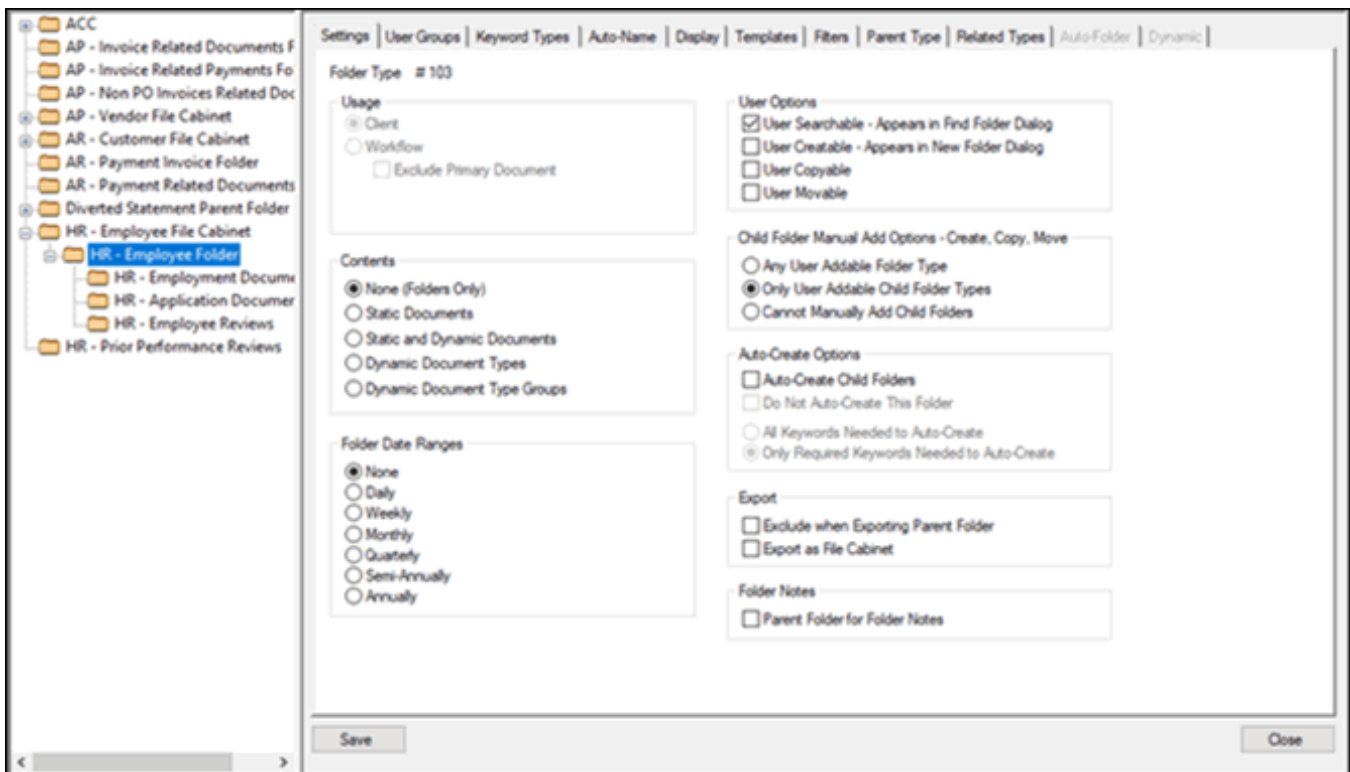
Folder Type configuration controls the following behavior:

- Users' ability to create, move, and copy folders
- Automatic creation of folders as documents are imported into OnBase or re-indexed (auto-folding)
- Automatic creation of a folder hierarchy before documents are imported into OnBase (auto-creation)
- The ability to add notes to folders

- How documents are added and organized

Note: Folder Types control whether folder contents are static, dynamic, or both. Understand these classifications before beginning configuration; you must apply one or more to your Folder Types. See [Using Dynamic vs. Static Folders on page 4](#), [Static Folder on page 3](#), and [Dynamic Folder on page 3](#).

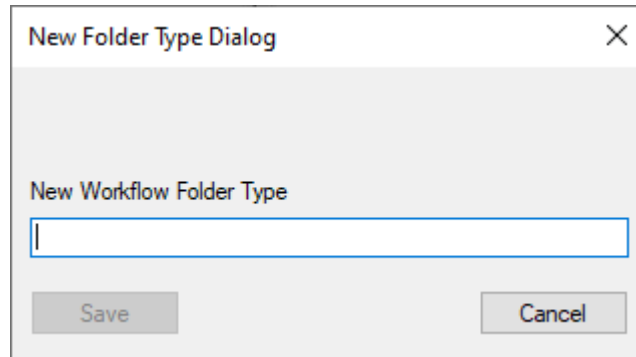
1. In OnBase Configuration, select **Document | Folder Types**. The **Folder Type** configuration dialog box is displayed:
 - The left pane contains the folder tree, which displays the Folder Types you have privileges to view and their parent/child relationships.
 - The right pane contains all available configuration settings for a Folder Type.
 - The title bar displays an asterisk (*) next to the Folder Type name when there are unsaved changes to the Folder Type.



Tip: To expand all Folder Types within a selected branch of the folder tree, right-click and select **Expand Tree**.

2. Right-click the folder tree background and select **New Workflow Folder**.
You can also select **New Child** from the right-click menu to place the new Folder Type inside the currently selected Folder Type. This method automatically assigns the currently selected Folder Type as the parent of the new Folder Type.

3. The **New Folder Type Name** dialog box is displayed. In the field provided, type the name of the new Folder Type.



- Choose a name that reflects the types of documents its folders will contain. For example, if folders based on this Folder Type will contain Auto Insurance policies, you could name the Folder Type **INS - Auto Policies**.
- Use a prefix (or other descriptive name) to indicate that this Folder Type is for a folder.

These naming conventions will make it easier to manage a folder structure containing many Folder Types.

Tip: Consider folder naming conventions carefully. Folder Types names are displayed in the folder search interface, which allows users to find specific folders. Choose a naming convention that makes sense for the user.

4. Click **Save**. The new Folder Type is selected with the **Settings** tab displayed.
5. Continue to additional configuration tasks as necessary
 - [Folder Type Settings on page 24](#)
 - [Folder User Groups on page 34](#)
 - [Folder Display Options on page 36](#)
 - [Folder Keyword Types Configuration on page 49](#)
 - [Folder Auto-Name Configuration on page 56](#)
 - [File Cabinet Configuration on page 12](#) (required)
 - [Dynamic Folder Type Configuration on page 100](#)
 - [Auto-Foldering on page 116](#)

Tip: To create a new Folder Type, copy an existing Folder Type that has similar configuration settings, and then customize the copy. This method allows you to quickly create new Folder Types without configuring each option. For more information, see [Copying Folder Type Configurations on page 113](#).

Folder Type Settings

Folder Type settings control how folders are created and populated in OnBase. Continue to the following topics for information about available settings:

- [Usage and Content Settings on page 24](#)
- [User Options on page 26](#)
- [Child Folder Manual Add Options on page 28](#)
- [Auto-Create Options on page 30](#)
- [Date-Based Folders on page 32](#)
- [Folder Notes on page 33](#)

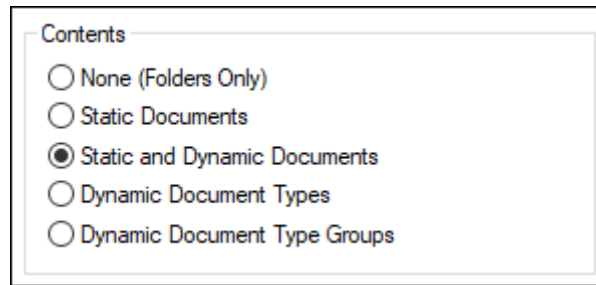
Usage and Content Settings

When you create a Folder Type, you must specify how it will be used and what it will contain.

1. With the Folder Type selected in the Folder Tree, select the **Usage** option for the Folder Type. Unless the Folder Type will be used solely for Workflow Work Folders, select **Client**. This allows the Folder Type to be used in the Client module.

For information about Workflow Work Folders, Records Management, or Document Tracking, see the respective documentation for these modules.

2. Under **Contents**, select the option describing what folders of this Folder Type will contain:



Contents

- ☐ None (Folders Only)
- ☐ Static Documents
- ☒ Static and Dynamic Documents
- ☐ Dynamic Document Types
- ☐ Dynamic Document Type Groups

Available options are described in the following table:

Contents	Description
None (Folders Only)	<p>Select to allow only child folders to be placed directly in the folder, not documents. With this setting, documents can be placed only in child folders within the folder.</p> <hr/> <p>Note: If the Include Child Folder Static Contents display option is selected for a None (Folders Only) Folder Type, its child folders' documents will be displayed directly in the folder.</p> <hr/>
Static Documents	<p>Select if folders of this Folder Type will contain documents as well as folders.</p> <p>Any type of document can be placed into a static folder. Because there are no Document Type restrictions, you don't need to configure dynamic folder parameters.</p>
Static and Dynamic Documents	<p>Select if folders of this Folder Type will contain both static folders as well as dynamic folders.</p>
Dynamic Document Types	<p>Select if folders of this Folder Type will contain documents as well as folders.</p> <p>Documents from Document Types configured for the folder are displayed in the folder. Every time the folder is opened, the database is queried for documents that match the folder's Document Type and keyword criteria.</p> <p>Be sure to configure dynamic parameters for the Folder Type. See Dynamic Folder Type Configuration on page 100.</p>
Dynamic Document Type Groups	<p>Select if folders of this Folder Type will contain documents as well as folders.</p> <p>Only documents from Document Type Groups configured for the folder are displayed in the folder. Every time the folder is opened, the database will be queried for documents that match the folder's Document Type Group and keyword criteria.</p>

Note: If a Folder Type has both static and dynamic contents, it is possible for folders to contain duplicate documents. A document is displayed twice in a static and dynamic folder if the document meets the dynamic criteria and is also placed in the folder manually.

User Options

On the **Settings** tab, the user options specify whether users can create, search for, move, or copy folders of this Folder Type.



User Options

- ☒ User Searchable - Appears in Find Folder Dialog
- ☒ User Creatable - Appears in New Folder Dialog
- ☐ User Copyable
- ☐ User Movable

Under **User Options**, select the options appropriate for your solution:

- [User Searchable](#)
- [User Creatable](#)
- [User Copyable](#)
- [User Movable](#)

User Searchable

This option allows users to search for folders of this Folder Type. User-searchable Folder Types are listed in the **Find Folder** dialog box in the Client.

User Creatable

This option allows users to create a folders of this Folder Type inside a folder or file cabinet. User-creatable Folder Types can be selected from the **New Folder** dialog box in the Client. Users must have the **Create** folder privilege to create folders.

User Copyable

This option allows users to copy folders of this Folder Type to other folders. By copying folders, users can quickly create duplicate records of data in the folder system while maintaining one set of documents.

- All Keyword values from the original folders are replicated on the copies.
- When a folder is copied, all of its child folders are copied as well. Child Folder Types don't need to be configured as copyable.
- Users must have the **Copy** folder privilege for the selected Folder Type to copy folders.
- Users can copy folders only in the OnBase Client. Users cannot copy folders in the OnBase Web Client or Unity Client.

User Movable

This option allows users to move folders of this Folder Type to other folders. Movable folders offer the flexibility to change how a folder and its contents are classified in your folder system.

- OnBase can update the Keyword values on a moved folder and its contents to match the values on the new parent folder. For information about this feature, see [Keyword Update Rules for Moved Folders on page 27](#).
- When a folder is moved, all of its child folders are moved, too. Child Folder Types don't need to be configured as movable.
- Users must have the **Move** folder privilege for the selected Folder Type to move folders.
- Users can move folders only in the OnBase Client. Users cannot move folders in the OnBase Web Client or Unity Client.

Keyword Update Rules for Moved Folders

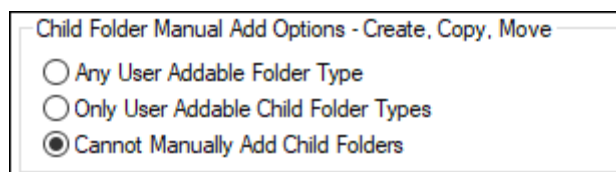
When you move a folder, you may want to update its contents' Keyword values to match those on the new parent folder. For example, in a Human Resources environment, moving an employee's files from a **Temporary** folder to a **Full-Time** folder represents a change in status for that employee. In this case, OnBase can update the employment status on all of the employee's files.

OnBase uses the following rules when updating values on a moved folder and its contents:

- If the new parent folder has a different Folder Type than the original parent folder, then no Keyword Values are updated.
- If the original parent folder and the new parent folder are based on the same Folder Type, then OnBase updates the values of Keyword Types configured as "common parent Keyword Types" on the moved folder and its contents.
- If either the moved folder or the new parent folder have multiple or blank Keyword Values for any of the common Keyword Types, then no Keyword Values are updated. If contents won't be updated, OnBase displays a notification and requests confirmation to move the folder.
- If the moved folder and its contents have different values for a common Keyword Type, then that Keyword Type is not updated on child folders and documents. This rule prevents the improper updating of values when the contents should have different values than the moved folder.
- Keyword values are updated on documents and folders regardless of the user's Keyword privileges on the documents and folders.
- Keyword changes are logged. To view changes, right-click the affected document or folder, and then select **History**.

Child Folder Manual Add Options

If the Folder Type contains child Folder Types, you can restrict the Folder Types users can manually create, copy, or move within the current Folder Type.



Child Folder Manual Add Options - Create, Copy, Move

☐ Any User Addable Folder Type

☐ Only User Addable Child Folder Types

☒ Cannot Manually Add Child Folders

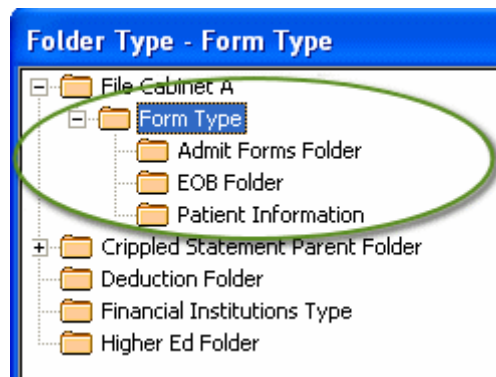
From the **Child Folder Manual Add Options** section, select one of the following options listed below (which are unavailable for Workflow or Records Management folders). These options control which Folder Types can be manually created or added to the selected Folder Type.

Option	Description
Any User Addable Folder Type	Makes all user-creatable Folder Types available for creation within an existing folder. Users can copy or move any folders to this Folder Type. Folder Types that are not user-creatable cannot be created or added to the folder. Note: This option is unavailable if the Folder Type is configured to order child folders by Keyword Value. See Order by Keyword Value on page 40 for more information.
Only User Addable Child Folder Types	Makes only the user creatable child Folder Types for the current Folder Type available for creation within an existing folder. Copyable and movable folders can be added only if they are a child Folder Type of the current Folder Type. Folder Types that are not user-creatable cannot be created or added to the folder.
Cannot Add Child Folders	Users cannot manually create or add folders within folders of this Folder Type. For example, you may have the Folder Type configured to auto-create its child folders, or the child Folder Types are configured for auto-folding.

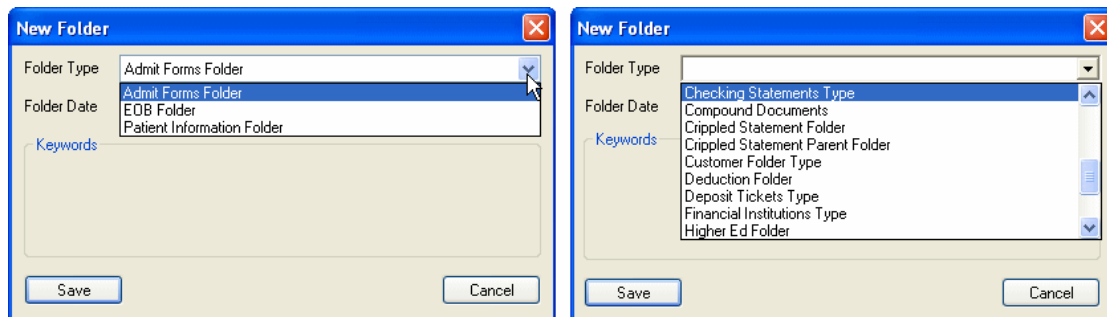
See the [Examples of Child Folder Manual Add Options](#) for the options available from these selections.

Examples of Child Folder Manual Add Options

The following example shows the effects of child folder options in the OnBase Client. This example uses the **Form Type** Folder Type, whose structure is illustrated below:

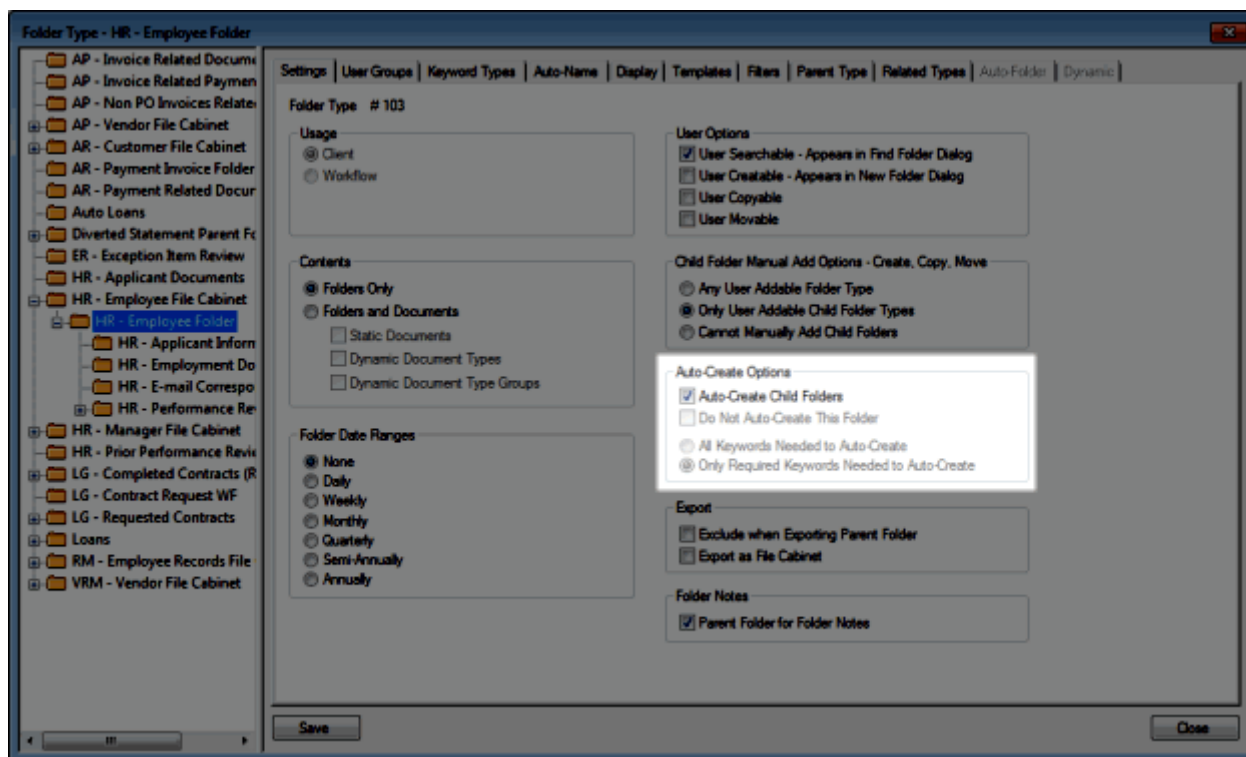


Refer to the following illustration. In the example on the left, the **Form Type** Folder Type is configured to allow **Only User Addable Child Folder Types**. Notice only the three child Folder Types of **Form Type** are available. In the example on the right, the **Form Type** Folder Type is configured to allow **Any User Addable Folder Type**. Notice all OnBase Folder Types configured as user-creatable are available.



Auto-Create Options

Auto-creation lets you create a consistent child folder structure for all folders that are based on the current Folder Type. Use auto-creation when each folder should have a consistent set of child folders regardless of whether they contain documents. If you want to create folders only when their documents reside in OnBase, you may prefer auto-folding. For a comparison of auto-creation and auto-folding, see [Auto-Creation and Auto-Folding on page 31](#).



For information about each auto-create option, see the following topics:

- [Auto-Create Child Folders on page 30](#)
- [Do Not Auto-Create This Folder on page 30](#)
- [All Keywords Needed to Auto-Create on page 31](#)
- [Only Required Keywords Needed to Auto-Create on page 31](#)

Auto-Create Child Folders

Select this option to automatically create the child folder structure when a folder based on this Folder Type is created. This feature creates a folder structure before the child folders' documents are present in OnBase, and it ensures that each folder based on this Folder Type has a consistent child folder structure.

Do Not Auto-Create This Folder

Select this option to prevent folders based on this Folder Type from being auto-created when the parent folder is created. This option applies only if the Folder Type's parent is configured to auto-create child folders.

For example, suppose you have an **Employee Documents** Folder Type that is configured to auto-create its child folders. The **Employee Documents** Folder Type may have a **Separated** child Folder Type to contain employee separation documents. A **Separated** folder should reside in an employee's **Employee Documents** folder only if the employee has left the company.

If you wanted all child folders within the **Employee Documents** Folder Type to be auto-created except for **Separated**, you would apply the **Do Not Auto-Create This Folder** option to the **Separated** Folder Type.

All Keywords Needed to Auto-Create

Select this option if a folder based on the current Folder Type should be auto-created only if values for all of its Keyword Types are provided on the parent folder.

A folder based on the current Folder Type will not be auto-created unless it can inherit all of its Keyword values from the parent folder.

Only Required Keywords Needed to Auto-Create

Select this option if a folder based on the current Folder Type can be auto-created as long as the values for its required Keyword Types are provided on the parent folder.

A folder based on the current Folder Type will not be auto-created unless it can inherit all of its required Keyword values from the parent folder.

For more information about required Keyword Types, see [Required Keyword Types for Folder Types on page 47](#).

Auto-Creation and Auto-Foldering

OnBase provides two methods for creating folders automatically: auto-foldering and auto-creation. Auto-foldering automatically creates a folder and all of its parent folders when a document is imported. Auto-creation automatically creates a folder's child folders (one child folder per child Folder Type) when the parent folder is created, even if the child folders' documents don't yet exist in OnBase.

Choose the method of folder creation that best suits your business practices. If folders should be created before documents are imported, and each folder will contain the same subset of child folders, use auto-creation. Keep in mind that empty, auto-created folders may confuse users who expect the folders to contain documents. If a folder should be created only when one of its documents is brought into OnBase, use auto-foldering.

Auto-creation and auto-foldering can be used together to build the folder structure both up and down the folder tree. Rather than configuring auto-foldering for each child Folder Type in a folder tree, you can configure auto-foldering on either the parent Folder Type or one of the child Folder Types. Then, use the auto-create options to create the rest of the child folders when the parent folder is created. This configuration saves you time because you don't have to configure auto-folder Keyword Types for each child Folder Type.

Note: Do not select **Auto-Create Child Folders** when all child Folder Types have auto-foldering configured or when there is only one child Folder Type. The auto-create option should be used only if there are multiple child Folder Types.

For more information about auto-folding, see [Configuring a Folder Structure for Auto-Folding on page 121](#).

Date-Based Folders

Date-based folders let you organize documents by Document Date using folder date ranges. By applying a folder date range, you can use folders to dynamically store documents whose Document Dates fall within the specified range. This feature provides the most value when used with dynamic folders, auto-folding, or both.

- When used with auto-folding, folders are created based on Document Date.
For example, suppose auto-folding is configured for checking statements, and the Folder Type has a folder date range of **Monthly**. When a checking statement enters OnBase with a date of 01/11/2008, a folder will be created for the month of January. When a checking statement enters OnBase with a date of 02/11/2008, a folder will be created for the month of February.
- When dynamic date-based folders are manually created, the folder date range is based on the user-specified **Folder Date** value. To be dynamically stored, documents must have a Document Date that falls within the date range on the folder, and they must satisfy any criteria configured on the Folder Type's **Dynamic** tab.
For example, if you create a month-based folder in January, all documents that satisfy the Folder Type dynamic criteria and whose Document Dates are within the month of January will be automatically pulled into the folder.

Note: Changing the **Folder Date** value after a folder is created will not change the folder's date range. In the example above, if you changed the Folder Date from 01/11/2008 to 04/11/2008, the folder will retain a date range of January.

Folder date range options are described in the following table:

Date Range	Description
None	Folders will not organize contents based on date.
Daily	Folders will contain documents whose Document Dates are the same.
Weekly	Folders will contain documents whose Document Dates fall within the same week (e.g., Sunday–Saturday). By default, OnBase uses Sunday as the start of the week. To change the start of the week for weekly folders, configure Weekly Folder Settings on page 74 .
Monthly	Folders will contain documents whose Document Dates fall within the same month.
Quarterly	Folders will contain documents whose Document Dates fall within the same quarter. Q1 is January–March, Q2 is April–June, Q3 is July–September, and Q4 is October–December.
Semi-Annually	Folders will contain documents whose Document Dates fall within the same half of the year (January–June or July–December).
Annually	Folders will contain documents whose Document Dates fall within the same year.

Tip: You can have different combinations of folder date ranges between parent folders and child folders. For example, a parent folder can be configured with a folder date range of **Annually** and it can contain child folders with folder date ranges for **Monthly**.

Note: You must configure the Auto-Name string to name date-based folders appropriately. See the Auto-Name configuration section for details.

Folder Notes

If users need to add comments or bookmarks to folders of this Folder Type, select **Parent Folder for Folder Notes**. This setting allows users who have sufficient privileges to add folder notes to any folders or child folders of this Folder Type. For information about folder notes and how they are configured, see [Folder Notes on page 106](#).

Folder User Groups

The **User Groups** tab controls User Group access to folders based on the selected Folder Type. To allow users to open a folder, you must assign their User Group privileges to view the Folder Type, its parent Folder Types, and its file cabinet. If a user lacks rights to the file cabinet or parent Folder Type in which a folder resides, the user cannot open that folder.

Note: If you are updating a file cabinet Folder Type, updated User Group assignments are updated automatically to the associated file cabinet.

To configure User Groups for a Folder Type:

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

The screenshot displays the 'Folder Type' dialog box in the OnBase Configuration module, specifically the 'User Groups' tab. The left-hand pane shows a hierarchical folder tree. The 'HR - Employee Folder' is selected and highlighted in blue. The right-hand pane is titled 'Folder Type #103' and contains several configuration sections:

- Usage:** Includes radio buttons for 'Client' (selected) and 'Workflow', and a checkbox for 'Exclude Primary Document'.
- Contents:** Includes radio buttons for 'None (Folders Only)' (selected), 'Static Documents', 'Static and Dynamic Documents', 'Dynamic Document Types', and 'Dynamic Document Type Groups'.
- Folder Date Ranges:** Includes radio buttons for 'None' (selected), 'Daily', 'Weekly', 'Monthly', 'Quarterly', 'Semi-Annually', and 'Annually'.
- User Options:** Includes checkboxes for 'User Searchable - Appears in Find Folder Dialog' (checked), 'User Creatable - Appears in New Folder Dialog', 'User Copyable', and 'User Movable'.
- Child Folder Manual Add Options - Create, Copy, Move:** Includes radio buttons for 'Any User Addable Folder Type', 'Only User Addable Child Folder Types' (selected), and 'Cannot Manually Add Child Folders'.
- Auto-Create Options:** Includes checkboxes for 'Auto-Create Child Folders' and 'Do Not Auto-Create This Folder', and radio buttons for 'All Keywords Needed to Auto-Create' and 'Only Required Keywords Needed to Auto-Create' (selected).
- Export:** Includes checkboxes for 'Exclude when Exporting Parent Folder' and 'Export as File Cabinet'.
- Folder Notes:** Includes a checkbox for 'Parent Folder for Folder Notes'.

2. Select the Folder Type you want to configure from the folder tree and select the **User Groups** tab. A list of available and selected User Groups for the Folder Type is displayed.

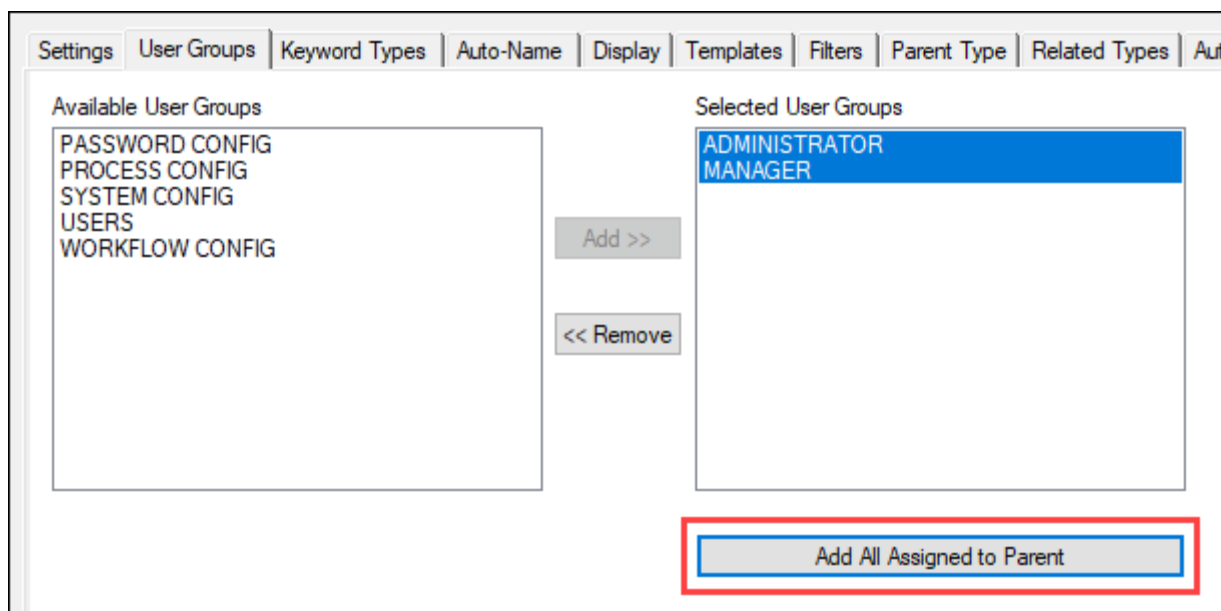
The screenshot displays the 'User Groups' configuration window. It features a tabbed interface at the top with the following tabs: Settings, User Groups (selected), Keyword Types, Auto-Name, Display, Templates, Filters, Parent Type, and Related Types. The main area is divided into two panels. The left panel, titled 'Available User Groups', contains a list of user groups: PASSWORD CONFIG, PROCESS CONFIG, SYSTEM CONFIG, USERS, and WORKFLOW CONFIG. The right panel, titled 'Selected User Groups', contains a list of user groups: ADMINISTRATOR and MANAGER. Between these two panels are two buttons: 'Add >>' and '<< Remove'. At the bottom left of the window is a 'Save' button.

3. From the **Available User Groups** list, select one or more User Groups to assign to the Folder Type.

- Click **Add**. The selected User Groups are moved to the **Selected User Groups** list.

Tip: You also can double-click a User Group from the **Available User Groups** list to move it to the **Selected User Groups** list.

If you selected a child Folder Type, click **Add All Assigned to Parent** to assign all User Groups assigned to the parent Folder Type to the child Folder Type.



- Click **Save**.

Note: In addition to assigning rights to the Folder Type, you must also assign users rights to view documents within the folder. Ensure Document Types and User Groups & Rights are appropriately configured for users who need access to documents inside folders.

Folder Display Options

The Display tab allows you to configure folder display options. Folder display options let you configure how a folder and its contents are displayed. To configure display options, see the following topics:

- [Folder Contents Display Options on page 37](#)
- [Icons on page 38](#)
- [Document Sort Order on page 38](#)
- [Order Child Folders By on page 39](#)
- [Child Folder Display Options on page 41](#)

- Folder Tabs on page 46

Note: In the OnBase Client, **Child Folder Display Options** and **Folder Tabs** options apply to the advanced File Cabinets window only.

Folder Contents Display Options

These options control how documents are displayed in a folder. Use these options to determine how static documents are displayed and whether the folder should automatically open the first document.

Folder Contents Display Options

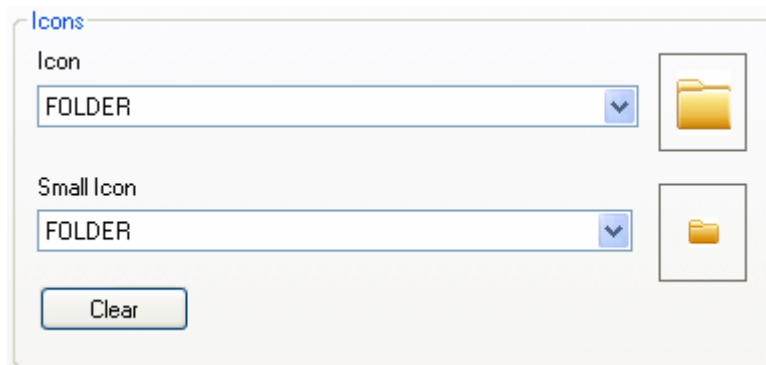
- ☐ Include Child Folder Static Contents
- ☐ Do Not Automatically Display First Document

Options are described in the following table:

Option	Description
Include Child Folder Static Contents	<p>Select this option to have the Documents pane display both documents residing in the folder and documents residing statically in its child folders when the folder is opened.</p> <p>If this option is not selected, users must open child folders to view documents that statically reside in the child folders.</p> <hr/> <p>Note: It is recommended you do not use the Include Child Folder Static Contents option, but rather create a folder structure that contains all the documents you want to view together.</p> <hr/>
Do Not Automatically Display First Document	<p>Select this option to prevent the first document in the folder from being opened when folders of this Folder Type are opened. Use this option for folders containing documents that take a while to display, such as large PDFs or CAD drawings.</p> <p>If this option is not selected, the first document in the folder is automatically displayed when the folder is opened.</p> <p>This option is available only for Folder Types configured to display documents.</p>

Icons

In the **Icons** section, select an image to represent the file cabinet or folders based on this Folder Type. Select the same image from the **Icon** and **Small Icon** drop-down lists.



The screenshot shows a configuration window titled "Icons". It contains two dropdown menus. The first dropdown is labeled "Icon" and has "FOLDER" selected. To its right is a preview of a yellow folder icon. The second dropdown is labeled "Small Icon" and also has "FOLDER" selected. To its right is a smaller preview of a yellow folder icon. At the bottom of the window is a "Clear" button.

Document Sort Order

The **Document Sort Order** options control how documents are ordered when folders of this Folder Type are opened. Select one of the following:

- **None:** Documents are displayed in the order that they are found in OnBase. This option provides results more quickly than other options, but users may have more difficulty finding the documents they need.
- **Document Date:** Documents are displayed in order by Document Date.
- **Document Handle:** Documents are displayed in order by Document Handle.
- **Document Name:** Documents are displayed in ascending or descending order by document Auto-Name.
- **Document Type Name:** Documents are displayed in ascending or descending order by Document Type name.
- **Document Type Sequence:** This option is available only for Folder Types configured to contain only Dynamic Document Types. When this option is selected, documents are displayed in the order their Document Types are listed under the **Dynamic** tab in Folder Type configuration.
- **Document Type Number:** This option is available for Folder Types configured to contain Static Documents, Dynamic Document Type Groups, or a combination of contents. Select this option to display documents in ascending order by Document Type Number.
- **Date Documents Added to Folder:** This option is only available for Folder Types configured to contain only Static Documents and created after OnBase 13. When this option is selected, documents are displayed in the order they were added to the folder.

- **Keyword Value:** This option is only available when the Folder Type contents are either Dynamic Document Types or Dynamic Document Type Groups, and one or more Document Types are assigned to the Folder Type. It is not available if the folder allows static documents. When this option is selected, documents are displayed in either ascending or descending order by the Keyword Value of the specified Keyword Type.

Once selected, select the Keyword Type you would like to order by from the **Order By Keyword Type** drop-down list. Available Keyword Types are dependent on the selected Document Types in the **Dynamic** tab (i.e., Keyword Types assigned to selected Document Types are displayed).

After you have selected one of the above options, select either **Ascending** or **Descending** to display the documents in either ascending or descending order, according to the sort order you selected.

Note: The **Ascending** and **Descending** options are not applicable to the **None** and **Document Type Sequence** options.

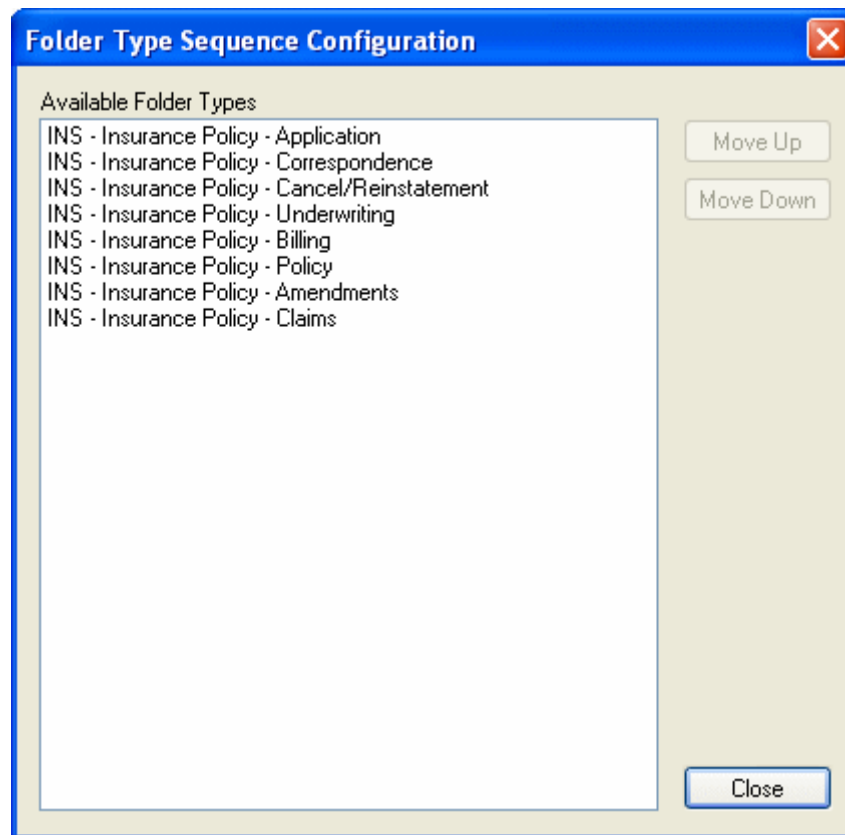
Order Child Folders By

These options control how child folders are displayed within folders of this Folder Type. Select one of the following:

- **None:** Child folders are displayed in the order that they are found in OnBase. This option provides results more quickly than other options, but users may have more difficulty finding the folders they need.
- **Oldest Folder First:** Child folders are displayed from oldest to newest based on the user-defined folder date.
- **Oldest Folder Last:** Child folders are displayed from newest to oldest based on the user-defined folder date.
- **Folder Name Ascending or Descending:** Child folders are displayed alphabetically in ascending or descending order based on folder Auto-Name.
- **Folder Type Sequence:** Child folders are displayed in a configured order based on Folder Type. When this option is selected, the **Sequence** button becomes available. See [Order by Folder Type Sequence on page 40](#) for additional information.
- **Keyword Value Ascending/Descending:** Child folders are displayed in ascending or descending order based on each folder's Keyword Value for the selected Keyword Type. See [Order by Keyword Value on page 40](#) for additional information.

Order by Folder Type Sequence

When you select **Folder Type Sequence**, the **Sequence** button becomes available. Click it to display the **Folder Type Sequence Configuration** dialog box.



Use this dialog box to specify the child folder order based on Folder Type. To change a child Folder Type's position in the sequence, select it and click the **Move Up** or **Move Down** button.

After you close the **Folder Type Sequence Configuration** dialog box and save the Folder Type's configuration, the folder tree displays the child Folder Types in the configured sequence.

Order by Keyword Value

The **Keyword Value Ascending** and **Keyword Value Descending** options allow child folders to be displayed in ascending or descending order by Keyword Value for a specified Keyword Type. For example, customer account folders can be arranged in ascending order by customer ID. This order can be alphanumeric, numeric, or chronological, depending on the Keyword Type's data type.

These options are available under the following conditions:

- The current Folder Type must have child Folder Types.
- The current Folder Type must not be configured to allow **Any User Addable Folder Type** to be created within it. This option is configured on the **Settings** tab under **Child Folder Manual Add Options - Create, Copy, Move**.

When you select a **Keyword Value** option, the adjacent drop-down list becomes available.

Select the Keyword Type by which child folders should be ordered. Only Keyword Types assigned to all child Folder Types are available. If the child Folder Types have no Keyword Types in common, then **<<None>>** is the only option available.

Child Folder Display Options

Child Folder Display Options control how folders based on this Folder Type will display child folders. You can optimize usability by applying different settings to each level of the folder tree.

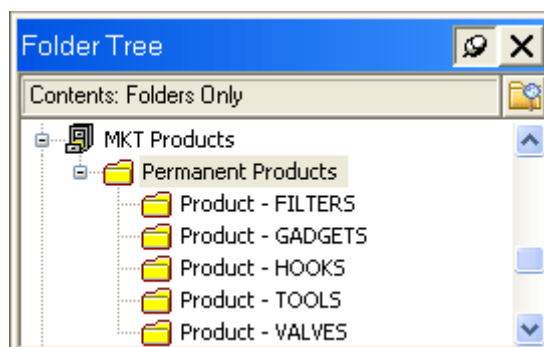
Note: In the OnBase Client, these settings apply to the advanced File Cabinets window only.

For information about the available options, read the following topics:

- [Normal Display on page 42](#)
- [Display Child Folders as Tabs on page 42](#)
- [Display Child Folders in a Pop-up List on page 43](#)
- [Only Display Child Folders from Search on page 45](#)

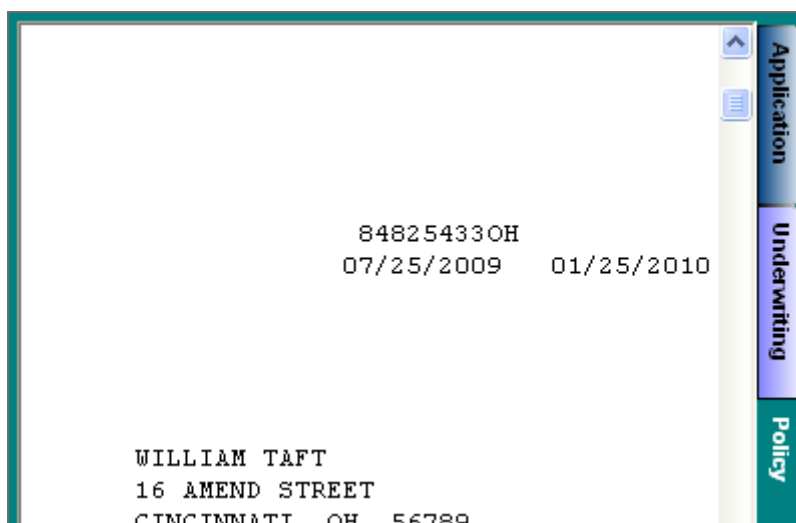
Normal Display

Normal Display allows users to browse to child folders by clicking through folders in the folder tree. Child folders are also displayed in the **Child Folders** pane.



Display Child Folders as Tabs

This option displays all child folders as tabs adjacent to the document viewer. From the **Tabs Location** drop-down list, the location of the tabs can be set to **Top**, **Right**, **Bottom**, or **Left**. In the following example, the Folder Type is configured to display its child folders as tabs to the right of the document viewer.



This option applies to the OnBase Client, Web Client, and Unity Client.

This setting works best for folders containing a limited number of child folders. For example, if there were 25 child folders, having all 25 displayed as tabs would make it difficult for users to find the correct folder. If there were only 5 child folders, the layout would be very easy to use.

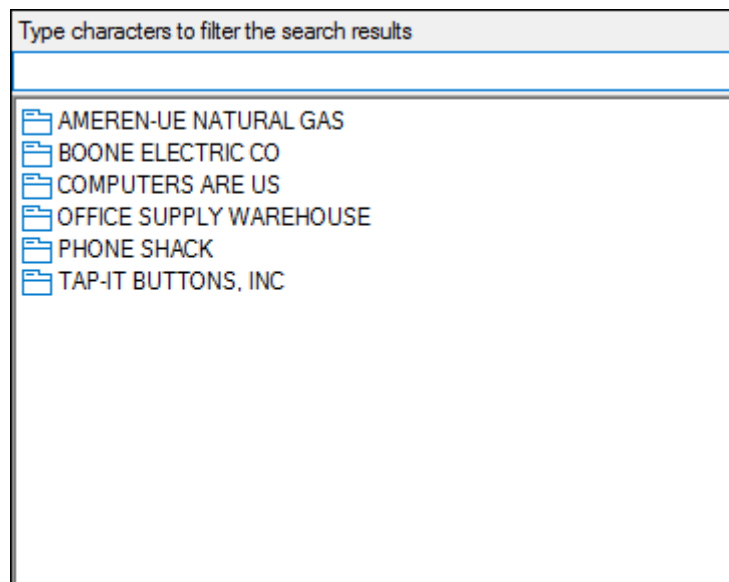
This setting is well suited for Folder Types that contain a consistent set of child folders under a parent. For example, if an insurance company uses a Folder Type named Policy Number and every Policy Number folder contains the same set of child folders (Application, Underwriting, Billing), then this would be a good case for displaying child folders as tabs.

Caution: Select this setting only if the Folder Type is configured to contain Folders Only. Because the first child folder tab is displayed automatically when the folder is opened, documents residing in the folder's root (i.e., not in its child folders) would be difficult to access.

Display Child Folders in a Pop-up List

Select this option to display child folders in a pop-up list when users open folders of this Folder Type. Users can then select the folder they need from the pop-up list. This setting works best for folders that contain many child folders.

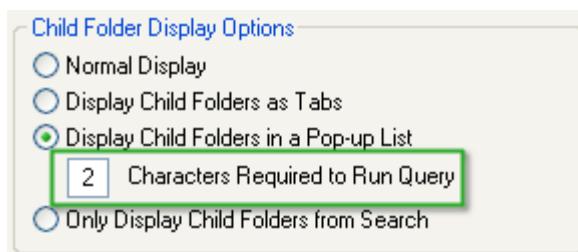
Users can filter the folders in the pop-up list by typing characters in the list's filter bar. For example, if a user typed RECORDS FOR in the filter bar, then the list would display only folder names beginning with RECORDS FOR.



Type characters to filter the search results

- AMEREN-UE NATURAL GAS
- BOONE ELECTRIC CO
- COMPUTERS ARE US
- OFFICE SUPPLY WAREHOUSE
- PHONE SHACK
- TAP-IT BUTTONS, INC

Configure the minimum number of characters that users must type into the filter bar before folders are displayed using the **Characters Required to Run Query** option. If a folder contains a large number of child folders, an unconstrained query for every child folder can hinder performance. By applying a character requirement, you can ensure users provide some constraints for the folders they need.



If a minimum is set, then the pop-up list displays the help text **Type at least # characters to perform search**, where # is the minimum number specified. If you leave the default setting of 0, then pop-up lists displays all child folders without waiting for user input.

If the Folder Type has only one child Folder Type configured, then the pop-up list's filter bar is prepopulated with the static characters that begin the child Folder Type's Auto-Name string. Static characters include the Folder Type name, which is represented by %N in the Auto-Name string. This feature saves users time spent typing characters that are the same for all child folders. If you configured the **Characters Required to Run Query** option, then the static characters do not count toward the minimum character restriction. This feature is not supported in the OnBase Web Client.

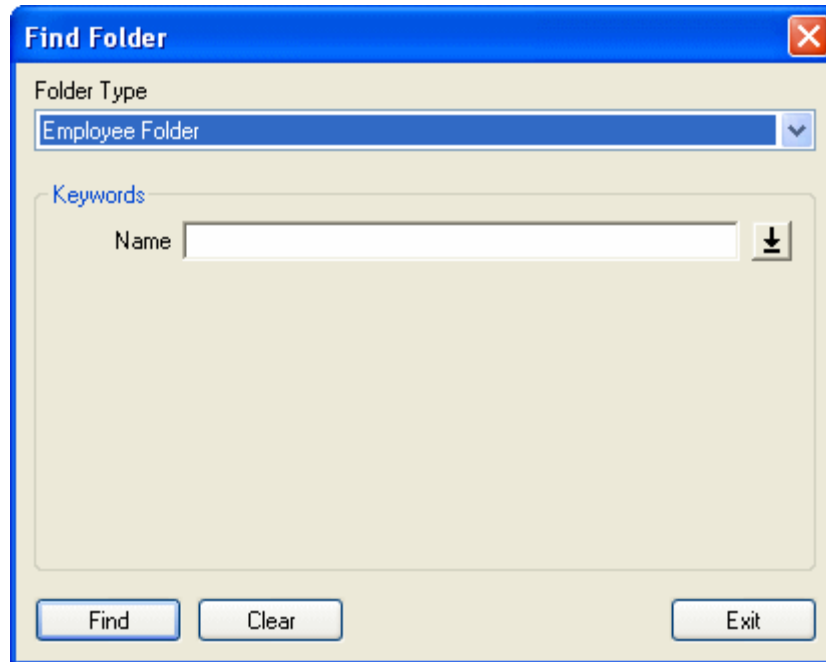
After a child folder is selected from the pop-up list, that folder is the only child folder displayed in the **Folder Tree** pane until the user clicks the parent again and selects a new folder. Each subsequent folder gets added to the **Folder Tree** pane, making it easy for users to work with a handful of folders within the list.

In the **Folder Tree** pane, an icon is displayed below the parent folder, indicating that more child folders can be retrieved. The user can click the icon to access the pop-up list and add more child folders to the **Folder Tree** pane.



Only Display Child Folders from Search

The search option allows users to retrieve child folders through a folder search. When this option is selected, the **Find Folder** dialog box is displayed when folders of this type are opened. This dialog box lets users enter Folder Type and Keyword criteria for the child folders they need.



Tip: To allow users to search for folders across multiple Folder Types, create a Folder Type Custom Query. For more information, see [Folder Type Custom Queries](#) on page 142.

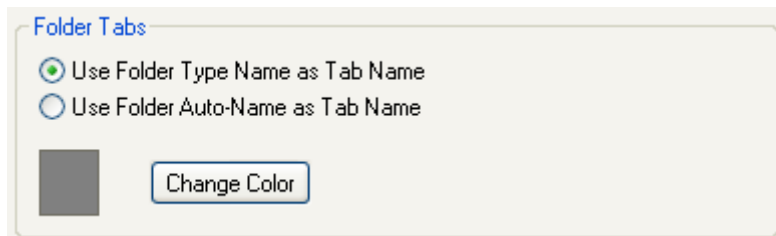
Ensure child Folder Types are configured as **User Searchable** if you choose this display option. Only searchable child Folder Types of the selected folder are available for searching, and only immediate child folders of the selected folder can be returned by the search.

Note: This option has no effect in the classic File Cabinets window in the OnBase Client.

Note: When a user finds and opens a child folder, it is added to the **Folder Tree** pane. Folders added to the tree from search results do not show up in the **Child Folders** pane when the parent folder is selected.

Folder Tabs

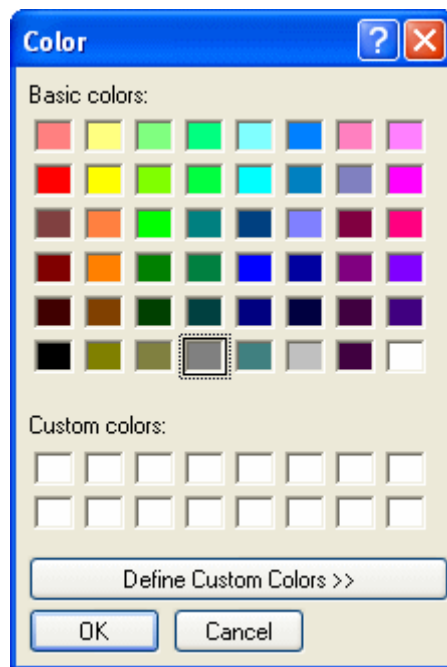
The **Folder Tabs** options are available if the selected Folder Type's parent is configured to display its child folders as color tabs. These options control how folders of this Folder Type are displayed as tabs within a parent folder.



Select one of the following:

- **Use Folder Type Name as Tab Name:** Select to display the folder's Folder Type name on the tab.
- **Use Folder Auto-Name as Tab Name:** Select to display the folder's configured Auto-Name on the tab. This option should be used when the parent Folder Type contains multiple child folders of the same Folder Type.

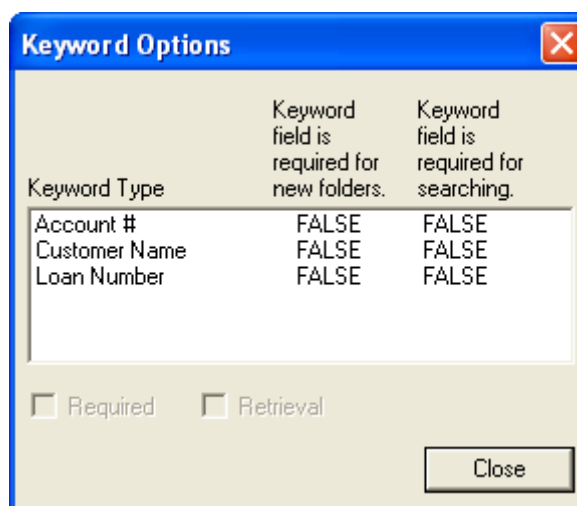
Click **Change Color** to change the Folder Type's tab color. Use the **Color** dialog box to either select a basic color or define a custom color for the tab.



If you define a custom color and click **Add to Custom Colors**, the color is added to the **Custom colors** palette, where you can apply it to other folder tabs. Colors in this palette remain available for the current Configuration session only. When you exit OnBase Configuration, the **Custom colors** palette is cleared.

Required Keyword Types for Folder Types

Use **Keyword Options** to require users to provide a value when creating or searching for folders of this Folder Type.



Unlike Keyword Type configuration settings, these options affect Keywords on a Folder Type basis. The same Keyword Type can have different options applied for each Folder Type it is assigned to. For example, **Customer Name** is a required value for new folders of the **Purchase Order** Folder Type, while it is an optional value for new folders of the **Misc. Expenses** Folder Type.

Note: Folder search requirements can be overridden by users who have the **Override Query Restrictions** administrative privilege.

1. From the Folder Type configuration dialog box, select a Folder Type and click **Keyword Types**.
2. Ensure at least one Keyword Type is in the **Selected** list and click **Options**.
The **Keyword Options** dialog box presents true/false conditions for the Keyword Types associated with the Folder Type.
3. Select a Keyword Type.
4. Apply the options described in the following table as needed:

Option	Description
Required	<p>Select to make the Keyword Type required for new folders.</p> <p>When this condition is set to TRUE, the Keyword Type label appears red at the Import dialog box, indicating that the value must be entered to create the folder. Save will be disabled until a Keyword value is supplied for this Keyword Type.</p> <p>Clear this option to let users create folders of this Folder Type without providing a value for this Keyword Type.</p>

Option	Description
Retrieval	Select to make the Keyword Type required for searching for folders (in the Find Folder dialog box). As a best practice, set at least one Keyword Type as required for searching. Clear this option to let users search for folders of this Folder Type without providing a value for this Keyword Type.

5. Click **Save** to set the conditions. The selected Keyword Type displays **TRUE** for the applied conditions.
6. Click **Close** when finished.
7. Click **Save** to save the Keyword Type changes before closing Folder Type configuration.

Note: If an automatic auto-folding process creates a folder that is missing a required Keyword, OnBase still creates the folder, but the missing Keyword shows up in the Verification report. If a manual auto-folding process creates a folder that is missing a required Keyword (upon Index or Re-Index) OnBase still creates the folder and the user receives a message that a folder was created without a required Keyword value.

Folder Keyword Types Configuration

Assign as few Keyword Types as necessary. When assigning a Keyword Type to a Folder Type, you should be able to justify its function.

Folder Keyword Types can be used for the following functions:

- Searching
- Dynamic foldering
- Setting up a parent-child relationship for auto-foldering
- Uniquely identifying a folder for auto-foldering
- Naming folders (using Auto-Name strings)
- Providing default values for drag and drop document indexing
- Securing folder contents (using Security Keywords)

To assign Keyword Types to a Folder Type, do the following:

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

Settings | User Groups | Keyword Types | Auto-Name | Display | Templates | Filters | Parent Type | Related Types | **Auto-Folder** | Dynamic

Folder Type #103

Usage

☒ Client

☐ Workflow

☐ Exclude Primary Document

User Options

☒ User Searchable - Appears in Find Folder Dialog

☐ User Creatable - Appears in New Folder Dialog

☐ User Copyable

☐ User Movable

Child Folder Manual Add Options - Create, Copy, Move

☐ Any User Addable Folder Type

☒ Only User Addable Child Folder Types

☐ Cannot Manually Add Child Folders

Auto-Create Options

☐ Auto-Create Child Folders

☐ Do Not Auto-Create This Folder

☐ All Keywords Needed to Auto-Create

☒ Only Required Keywords Needed to Auto-Create

Export

☐ Exclude when Exporting Parent Folder

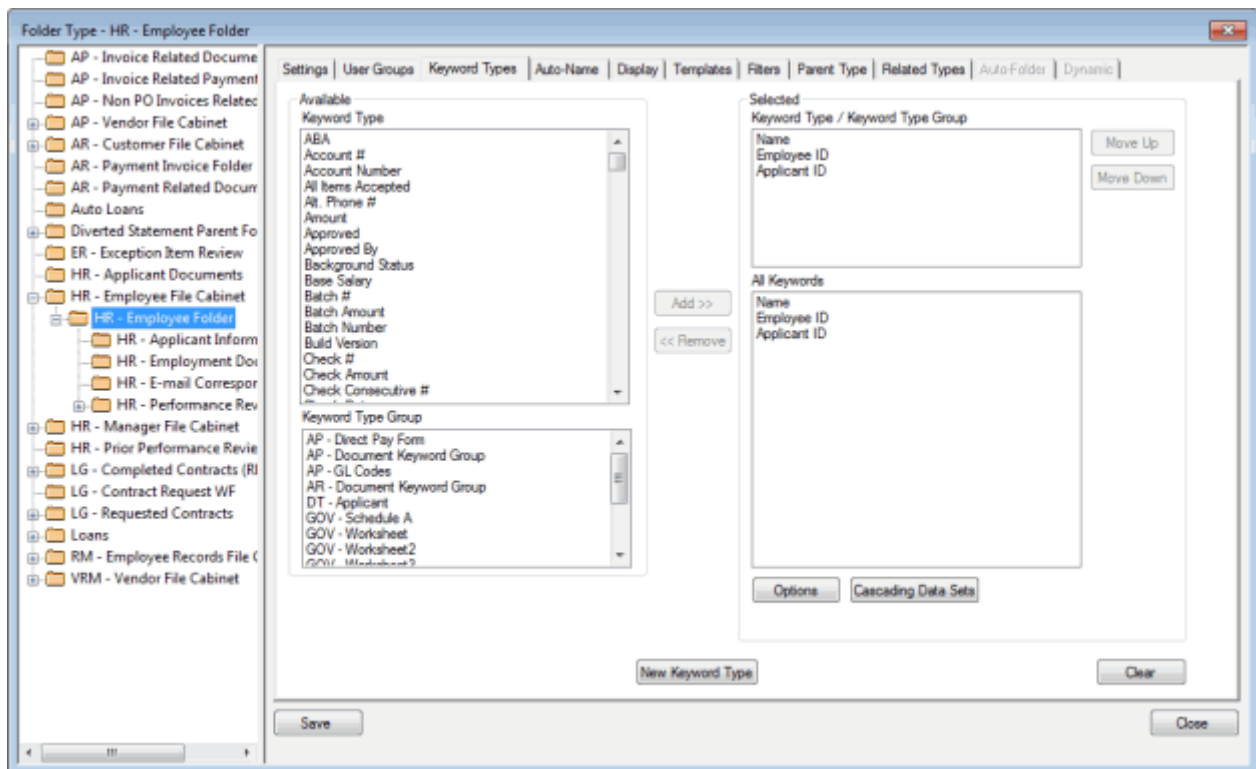
☐ Export as File Cabinet

Folder Notes

☐ Parent Folder for Folder Notes

Save

2. Select a Folder Type and click the **Keyword Types** tab.



The **Available** list displays all Keyword Types and Keyword Type Groups available in OnBase. Any Keyword Type or Keyword Type Group can be assigned to the Folder Type, but you should assign only those that serve the following purposes:

- To control whether a document is included in the folder, as with dynamic folders or auto-foldering.
- To allow users to search for folders by Keyword values.
- To name folders using Keyword values. You can incorporate Keyword values into folder names through Auto-Name configuration.

Note: If a Multi-Instance Keyword Type Group is assigned to the documents contained in a folder, the same Multi-Instance Keyword Type Group should be assigned to the folder's Folder Type. Otherwise, dynamic folders will not respect the grouping of assigned Keyword Types.

3. Select the Keyword Types and Keyword Type Groups to associate with the Folder Type. Keyword Type Groups may be either single-instance or multi-instance. If AutoFill Keyword Sets will be used, ensure you include all Keyword Types comprising the AutoFill Keyword Sets.
 - Click **Add** to move the selected items to the **Selected** list. For Keyword Type Groups, only the group name is displayed in the **Keyword Type / Keyword Type Group** pane. The individual Keyword Types are displayed in the **All Keywords** pane.
 - To remove a Keyword Type/Group from the **Selected** list, select the Keyword Type/Group from the upper-right pane and click **Remove**.

Caution: If you remove a Keyword Type that is used by the Folder Type's auto-folding process, the auto-folding configuration is deleted, and no message is displayed to indicate that the deletion occurred. Before removing a Keyword Type, ensure the Folder Type is not using it for auto-folding.

Tip: To select multiple Keyword Types and Keyword Type Groups, press **SHIFT** or **CTRL** as you click. Press **SHIFT** to select all Keyword Types between the first and last Keyword Type you click. Press **CTRL** to select each Keyword Type individually.

4. To create a new Keyword Type without exiting Folder Type configuration, click **New Keyword Type**. The **Keyword Type Configuration** dialog box is displayed, allowing you to create a new Keyword Type. Upon closing the **Keyword Type Configuration** dialog box, control is returned to the **Keyword Type** tab in Folder Type configuration, and the new Keyword Type can be immediately assigned to the Folder Type.
5. To change the order of Keyword Types or Keyword Type Groups in the Folder Type's Keyword dialog boxes, select the Keyword Type/Group in the **Selected** list and click **Move Up** or **Move Down**.
When you select a Keyword Type Group and click **Move Up** or **Move Down**, all Keyword Types in the group move up or down; the configured order of Keyword Types in the group is maintained.
6. To assign a Cascading Data Set to the Folder Type, click the **Cascading Data Sets** button from the **Keyword Types** tab. See [Cascading Data Sets on page 51](#).
7. To make any Keyword values required when users create or modify folders, click the **Options** button from the **Keyword Types** tab. For information on configuring Keyword Options, see [Required Keyword Types for Folder Types on page 47](#).
8. Click **Save** when finished.

Cascading Data Sets

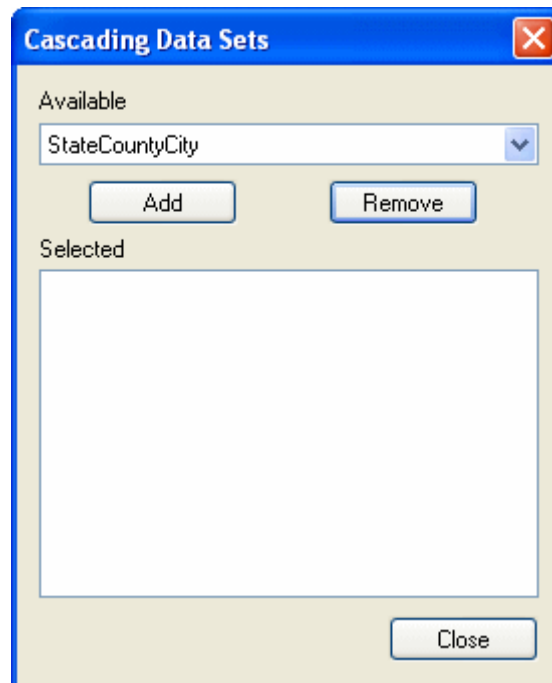
One or more Cascading Data Sets can be assigned to a Folder Type. To assign a Cascading Data Set to a Folder Type, first configure the Cascading Data Set in OnBase Configuration. You must also assign the Keyword Types in the Cascading Data Set to the Folder Type. Keyword Types that are not already assigned to the Folder Type can be added when you assign the Cascading Data Sets to the Folder Type.

For additional information about Cascading Data Sets and how they are configured, see the Configuring Cascading Data Sets topic in the OnBase Configuration module help.

Tip: In Folder Type configuration, arrange the selected Keyword Types in an order that reflects the parent/child relationship of Keyword Types in the Cascading Data Set. For example, if a Cascading Data Set includes Keyword Types for **State**, **County**, and **City**, then place **State** first, then **County**, and then **City**.

From the **Keyword Types** tab:

1. Click the **Cascading Data Sets** button. The **Cascading Data Sets** dialog box is displayed:

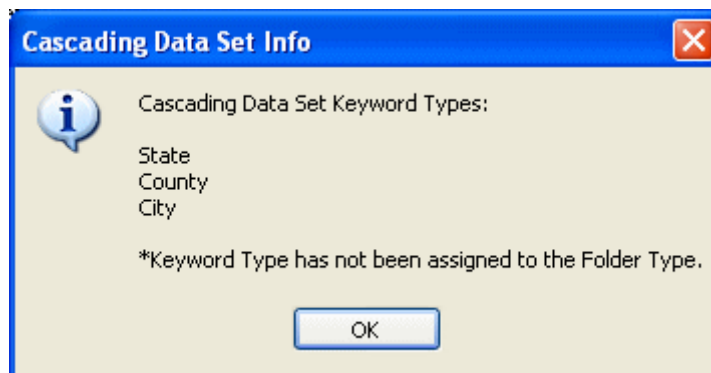


2. Select a Cascading Data Set from the **Available** drop-down list.
3. Click **Add**.
 - If the Cascading Data Set's root Keyword Type isn't currently assigned to the Folder Type, you are prompted to continue. Click **OK** to continue and to automatically assign the root Keyword Type to the Folder Type.
 - If a child Keyword Type isn't currently assigned to the folder, you are prompted to continue. Click **OK** to continue and to automatically assign the specified Keyword Type(s) to the Folder Type.

The Cascading Data Set is displayed in the **Selected** pane. To remove a Cascading Data Set, select it and click **Remove**.

4. To check whether all Keyword Types in the Cascading Data Set are assigned to the Folder Type, double-click the Cascading Data Set from the **Selected** list.

The **Cascading Data Set Info** dialog box displays an asterisk next to any Keyword Types that are not currently assigned to the Folder Type. In the following example, all Keyword Types have been assigned to the Folder Type:



5. Repeat steps 2 and 3 to add any additional Cascading Data Sets.
6. Click **Close**.
7. From the **Keyword Types** tab, click **Save**. You must click **Save** to save the Cascading Data Set configuration.

Folder Keyword Considerations

The following topics describe Keyword-related behaviors to consider when assigning Keyword Types to a Folder Type:

- [Keyword Considerations for Auto-Foldering on page 54](#)
- [Keyword Considerations for Security Keywords on page 55](#)
- [Keyword Considerations for Show Folder Locations on page 55](#)

Keyword Considerations for Auto-Foldering

Consider the following behaviors when planning and configuring auto-foldering.

Mask Characters

If you are using masked Keyword Types for auto-foldering, note that the Extract Mask Characters and Store Mask Characters settings are designed to store different data in OnBase.

Do not change this setting from one setting to another in an existing auto-foldering scheme. If this setting is changed after folders have been created through auto-foldering, new folders will be created upon auto-foldering documents, even if documents appear to have the same Keyword values as the existing folders.

Security Keywords

Security Keywords restrict a user's ability to open folders based on folder Keyword values.

If a Folder Type has Security Keywords applied, folder access will depend on whether the user is allowed to view items with certain Keyword values assigned.

Users who do not have access will not be able to open the folder, and they will receive a message that states that they have insufficient rights to access the selected folder.

Multiple Instances of Keyword Types and Auto-Foldering

When a Keyword Type used for auto-foldering has multiple values, OnBase automatically creates a folder for each Keyword value and places the document in each folder.

For instance, consider an Auto Insurance form that contains the following Keyword Types:

- **Driver SSN:** 111-11-1111
- **Driver SSN:** 222-22-2222
- **Driver Name:** Martha Washington
- **Driver Name:** George Washington

This form must be auto-folded into a **Driver SSN** folder. The **Driver SSN** Folder Type is set to auto-folder on both **Driver Name** and **Driver SSN** Keyword Types.

To ensure the folder contains the correct Driver SSN and Driver Name association, you must assign the Keyword Types to the Document Type in a Multi-Instance Keyword Type Group.

Intended Results (Two Folders Created) – Document Type contains Multi-Instance Keyword Type Group

Folder	Driver SSN	Driver Name
Folder 1	111-11-1111	Martha Washington
Folder 2	222-22-2222	George Washington

Unwanted Results – Document Type contains Individual Keyword Types Only

Folder	Driver SSN	Driver Name
Folder 1	111-11-1111	Martha Washington
Folder 2	111-11-1111	George Washington
Folder 3	222-22-2222	George Washington
Folder 4	222-22-2222	Martha Washington

Keyword Considerations for Security Keywords

If a user lacks rights to access a folder due to Security Keyword restrictions, the user is prevented from seeing the folder.

If a user lacks rights to access a document in a folder due to Security Keyword restrictions, the user is prevented from seeing the document in the folder.

Note: See the Configuration Help or Module Reference Guide for detailed information about Security Keyword configuration and usage.

Keyword Considerations for Show Folder Locations

The Show Folder Locations command requires values for all Keyword Types used to dynamically associate the document with the folder.

- If a value is left blank on the document, but not on the folder, the Show Folder Locations command will not return the folder, even if the other values match.
- If a value is left blank on folder but not on the document, the Show Folder Locations will return all folders that contain the remaining matching values, even though the value on the document is not blank.

Folder Auto-Name Configuration

Configure Auto-Name strings to automatically name folders based on a Folder Type. Folder names can be up to 150 characters in length. Click the **Auto-Name** tab to configure the Auto-Name string for the Folder Type.

The Auto-Name function allows OnBase to give many of the different items (e.g. documents, folders and notes) contained within the system a meaningful name using variables containing data about each specific item and/or static text. The results are documents that are descriptive and easily identifiable from a Document Search Results list, a drop-down list or from a folder tree.

Auto-Name strings are configured in the OnBase Configuration module at the Document Type, Note Type or Folder Type level. Auto-Name strings may also be configured for other items; see the related module's Help for more information.

Auto-Name symbols, the variables used to represent the specific information about each item when configuring the Auto-Name string, can be identified by the % before the symbol. See the section of the OnBase Configuration module Help that deals with each individual item for more information about configuring Auto-Name strings and the specific symbols available for each item.

Note: Auto-Name strings are limited to 150 characters. The maximum length of the generated Auto-Name varies depending on the OnBase item being named.

Note: When using an Oracle database, it is considered a best practice to capitalize all letters in Folder Type Auto-Name strings. If Auto-Name strings are mixed-case, folders may not always be listed alphabetically. Also, users won't be able to see folders with mixed-case Auto Name strings when they enter text into the pop-up list's filter bar. This occurs because Oracle databases are case-sensitive, and the folder pop-up list forces users to enter letters in uppercase. For more information, see [Oracle and Case Sensitivity on page 185](#).

To configure a Folder Type Auto-Name string:

1. In **Folder Type** configuration, click the **Auto-Name** tab.

The field at the top of the pane contains the string OnBase uses to generate each folder's name. The Auto-Name string is composed of static text and symbols, representing specific information about each folder. Symbols are distinguished from static text by the % or < that precedes them.

The screenshot shows the 'Auto-Name' configuration window. The top text field contains the string '%N - %D2'. Below this is a 'Symbols Used' section with a list of symbols and their meanings: %D2 = Folder Date, %N = Folder Type, %D1 = Date Stored, %# = Internal Folder Number, %I1 = Time Stored, %K'<keyword number>'.<repeats> = Keywords, <K>[keyword number].[repeats] = Real-Time Date Keywords, %S'<first character>'.<minimum length> = Keyword Substring, %U = User Name, <D1> = Real-Time Date Stored, %R = Real User Name, <D2> = Real-Time Folder Date, %C = Creator Name, <D3> = Real-Time Start Date, %D3 = Folder Start Date, <D4> = Real-Time End Date, %D4 = Folder End Date, and %D5 = Folder Period. To the right of the list are buttons for each symbol: Space - Space, Folder Date, Folder Type, Date Stored, Folder #, Time Stored, User Name, Real-Time Date Stored, Real User Name, Real-Time Folder Date, Creator Name, Real-Time Start Date, Folder Start Date, Real-Time End Date, Folder End Date, Folder Period, and Batch Number. At the bottom, there is a 'Keyword Type' dropdown menu, a 'Repeat' field with the value '1', two checkboxes ('Rename All Folders of This Folder Type' and 'Use Alphanumeric Keyword Substring'), and a 'Clear' button.

2. The **Symbols Used** section displays available variables. Click in the field, and either type the symbol or click the symbol's button on the right to add the symbol to the Auto-Name string.

The following variables are available for folder Auto-Name strings:

Symbol	Symbol Name	Function
%D2	Folder Date	Displays the user-defined Folder Date.
%N	Folder Type	Displays the folder's Folder Type.
%D1	Date Stored	Displays the date the folder was stored in OnBase. This date cannot be modified by the user.
%#	Internal Folder Number	Displays the unique internal number associated with the folder within OnBase.

Symbol	Symbol Name	Function
%I1	Time Stored	Displays the time the folder was stored in OnBase.
%K'<Keyword Number>'.<Repeats>	Keywords	Displays the folder's value for the specified Keyword Type. May be repeated to show more than one value for the Keyword Type.
<K[keyword number].[repeats]>	Real-Time Date Keywords	Displays the folder's value for the specified Date or Date & Time Keyword Type according to the Windows Regional Date Format set on the current workstation. May be repeated to show more than one value for the Keyword Type.
%S'<First Character>'.<Minimum Length>	Keyword Type Substring	Displays a substring of a Keyword Value stored for the folder. Must be configured to start a prescribed number of characters into the string and to extend for a prescribed number of characters. Note: This symbol must immediately follow the Keyword Type variable, without any separating spaces.
%U	User Name	Displays the user name of the user that created the folder.
<D1>	Real-Time Date Stored	Displays the date that the current folder was stored in OnBase according to the Windows Regional Date Format set on the current workstation. This date cannot be modified by the user.
%R	Real User Name	Displays the folder creator's real name as it appears in the User Names & Passwords dialog box. Note: If a user's real name has not been entered in User Names & Passwords , the user name of the folder's creator is displayed.
<D2>	Real-Time Folder Date	Displays the user-defined Folder Date according to the Windows Regional Date Format .
%C	Creator Name	Displays the user name of the user that created the folder.

Symbol	Symbol Name	Function
<D3>	Real-Time Start Date	<p>Depends on the Folder Date Range setting. Reflects the first available date for the chosen setting and displays according to the Windows Regional Date Format of the current workstation.</p> <hr/> <p>Note: If no date is configured, the Auto-Name string displays 1964-01-01 as the date.</p> <hr/>
%D3	Folder Start Date	<p>Depends on the Folder Date Range setting. Reflects the first available date for the chosen setting. For example, if the Folder Date Range was Yearly, the Folder Start Date would be 01/01/2006.</p> <hr/> <p>Note: If no date is configured, the Auto-Name string displays 1964-01-01 as the date.</p> <hr/>
<D4>	Real-Time End Date	<p>Depends on the Folder Date Range setting. Reflects the last available date for the chosen setting according to the Windows Regional Date Format of the current workstation.</p> <hr/> <p>Note: If no date is configured, the Auto-Name string displays 1964-01-01 as the date.</p> <hr/>
%D4	Folder End Date	<p>Depends on the Folder Date Range setting. Reflects the last available date for the chosen setting. For example, if the Folder Date Range was Yearly, the Folder End Date would be 12/31/2006.</p> <hr/> <p>Note: If no date is configured, the Auto-Name string displays 1964-01-01 as the date.</p> <hr/>
%D5	Folder Period	<p>Depends on the Folder Date Range setting. Reflects the month, quarter, or year for Folder Types that are configured with a date range of monthly, quarterly, or annually.</p> <p>If this option is used with a date range option not listed above, the Folder Date is displayed.</p> <hr/> <p>Note: If no date is configured, the Auto-Name string displays 1964-01-01 as the date.</p> <hr/>

Symbol	Symbol Name	Function
%BN	Batch Number	Displays the Batch Number of the batch used to import the document that created the folder. If the document was not imported into OnBase in a batch, the Batch Number is displayed as 0 .

3. If the Auto-Name string uses a date variable, refer to [Dates on page 60](#).
4. To add a Keyword Type to the Auto-Name string, select it from the **Keyword Type** drop-down list, or enter the symbol manually. For more information on displaying Keyword values in Auto-Names, see Keyword Types.
Partial Keyword values, called substrings, can be displayed in the Auto-Name. For information on configuring substrings, see Keyword Value Substrings.
5. Click **Save**.

Dates

Auto-Names offer two types of date options: static (%D1, %D2) and real-time (<D1>, <D2>). When static date options are used, dates are stored in the folder Auto-Name using the regional settings of the workstation that created the folder. These dates are displayed in the same format regardless of the regional settings on the workstation that retrieves the folder, which may make date formats appear inconsistent when folders are created and viewed from workstations with different regional formats. Because these dates are stored as text strings, they cannot be used to sort folders chronologically by dates in the Auto-Name.

If dates in Auto-Names should be displayed using the regional settings of the workstation that retrieves the folder, use the real-time date options. Real-time date options can also be used to sort folders chronologically by Auto-Name.

Note: The OnBase Client always appends a leading zero to single-digit days and months, even when it retrieves folders configured with real-time date options. If Auto-Names use the static date options (%D1), then folders created in the OnBase Client will have dates with leading zeros in the Auto-Name, regardless of the workstation or application that retrieves them.

Keyword Types

The following information may be useful when using Keyword Types in conjunction with Auto-Name strings:

- The Keyword Types listed in the **Keyword Type** drop-down list are the ones assigned to the Folder Type.
- To add a Keyword Type to the Auto-Name string, select it from the **Keyword Type** drop-down list. The Keyword Type symbol is added to the cursor's current position in the Auto-Name field.

- If a **Date** or **Date & Time** Keyword is in the Auto-Name string, the Keyword Value can be dynamically displayed according to a workstation's Regional Settings by selecting the **Real-Time** entry of the Keyword Type from the **Keyword Type** drop-down list. For example, a user in the United Kingdom might then see a different Auto-Name string than a user in the United States. If you select a **Date** or **Date & Time** Keyword entry that is not the **Real-Time** entry, the entry is displayed according to the Regional Settings of the workstation on which the folder was indexed or re-indexed.

Tip: Using **Real-Time** entries may be helpful for users located in different parts of the world. This way, they are able to see the **Date** and **Date & Time** Keywords in a format familiar to them.

- If a Keyword Type has multiple values, multiple Keyword values can be displayed in the Auto-Name string. First type a number in the **Repeat** field representing the number of times the Keyword Type is repeated. Then, select the Keyword Type from the **Keyword Type** drop-down list. The **Repeat** number is displayed last in the Auto-Name string's Keyword Type symbol.
For example, you may want to repeat a Keyword Type in the Auto-Name string for checking account folders. Checking accounts often have two names on the account, and you may want both names displayed on the folder.

Keyword Value Substrings

To display only part of the Keyword Value in an Auto-Name or Print Title string:

1. Select the **Use Alphanumeric Keyword Substring** check box before selecting a Keyword Type from the **Keyword Type** drop-down. The **Keyword Substring** dialog box is displayed.

Note: Keyword Value substrings for double-byte characters (for example, Japanese or Chinese characters) are only supported in databases that support Unicode characters.

Option	Description
First Character Position to Display	<p>The position of the first character in the Keyword Value to be displayed as part of the substring.</p> <p>For example, if a substring of the Keyword Value WASHINGTON is to be displayed in the string and the First Character Position to Display is set to 4, the substring of the Keyword Value will begin with H.</p> <hr/> <p>Note: This value must be equal to or greater than 1.</p>
Minimum Width of Keyword Value to Display	<p>The minimum length of the Keyword Value to be displayed.</p> <p>If the Keyword Value is shorter than the minimum length, the value will be padded with spaces on the right to reach the minimum length. If the Keyword Value is longer than the minimum length, this value has no effect on how the substring is displayed.</p>

2. Enter the desired values for the options in the **Keyword Substring** dialog box.
3. Click **Cancel** to close the dialog box without adding the Keyword Value or the substring to the Auto-Name or Print Title field; click **Continue Without Substring** to close the dialog box and add just the symbol for the Keyword Value (no substring restrictions) to the Auto-Name or Print Title field; click **Apply Substring** to close the dialog box and add the symbol for the Keyword Value with the substring restrictions you entered.

Considerations for Manually Entering Keyword Type and Substring Symbols

- The Substring symbol should immediately follow the Keyword Type symbol, without any separating spaces.
- Entering an invalid value (a value less than 1) for the **First Character Position to Display** option causes the symbol to be displayed as static text in the string.
- Both the Keyword Type and Substring symbols must be entered completely and correctly or the partial or incorrect symbols that are entered are displayed in the string as static text.

Renaming Folders by Updating an Auto-Name String

To rename all folders associated with a Folder Type, change the Auto-Name string.

After modifying the static text or variables in the Auto-Name field, select the **Rename All Folders of This Folder Type** option. Click **Save**. All folders associated with the Folder Type are renamed in OnBase.

If you rename the Folder Type using the **Rename** right-click option, and the %N variable occurs in the Folder Type's Auto-Name string, then you must use the **Rename All Folders of This Folder Type** option to update the names of existing folders based on the Folder Type.

Renaming Folder Types and File Cabinets

The following topics describe how to rename Folder Types and File Cabinets in OnBase Configuration:

- [Renaming Folder Types on page 63](#)
- [Renaming File Cabinets on page 65](#)

Renaming Folder Types

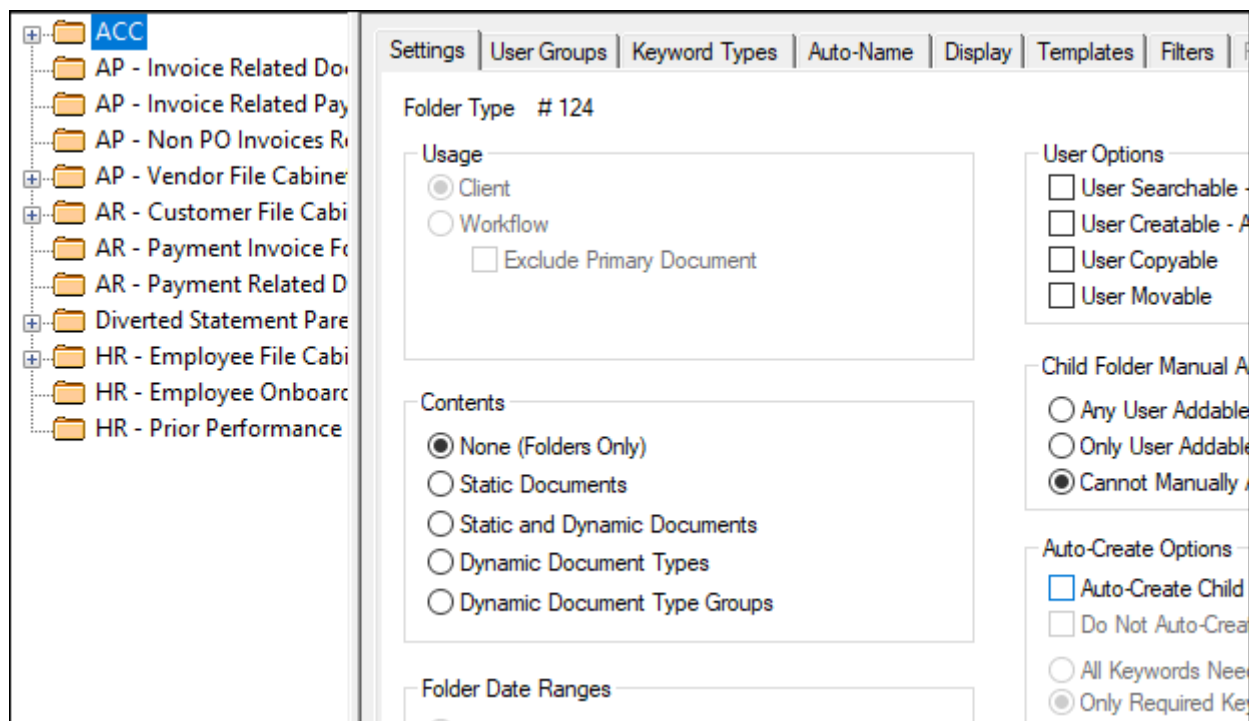
You can rename a configured Folder Type in the OnBase Configuration module. Renaming a Folder Type associated with a file cabinet also automatically renames the file cabinet.

This procedure does not rename existing folders or file cabinets in the OnBase Client. To rename existing folders, see [Renaming Folders by Updating an Auto-Name String on page 63](#).

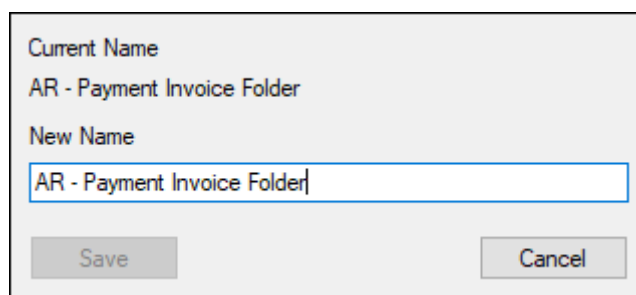
To rename file cabinets, see [Renaming File Cabinets on page 65](#).

To rename a Folder Type:

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



2. Select the Folder Type from the folder tree.
3. Right-click the Folder Type and select **Rename**. The **Rename Folder Type** dialog box is displayed.



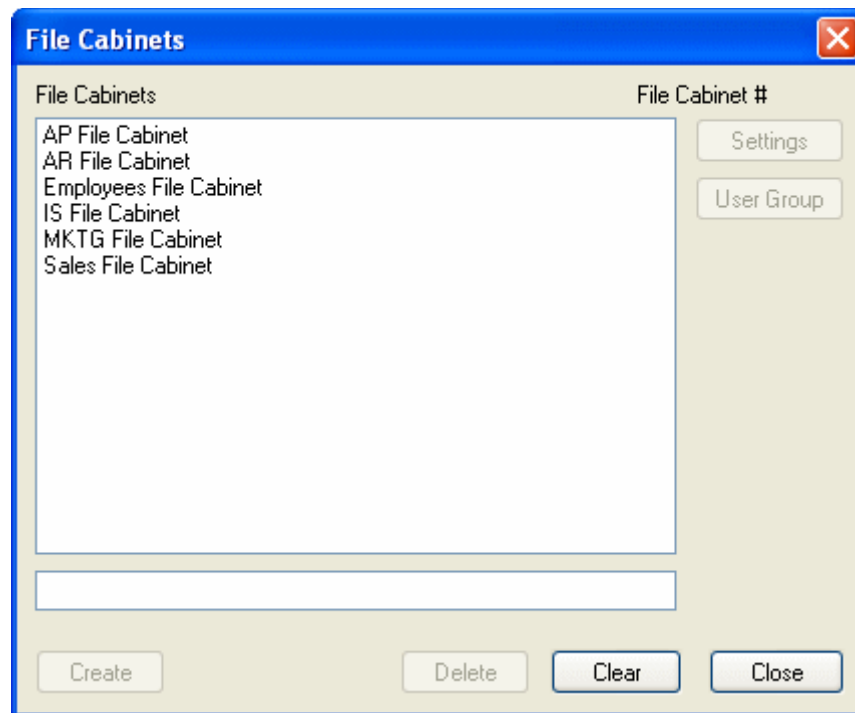
4. Type a new name for the Folder Type in the **New Name** field.
5. Click **Save**.

Note: If you rename the Folder Type and the %N variable occurs in the Folder Type's Auto-Name string, then you must use the **Rename All Folders of This Folder Type** option to update the names of existing folders. See [Renaming Folders by Updating an Auto-Name String on page 63](#).

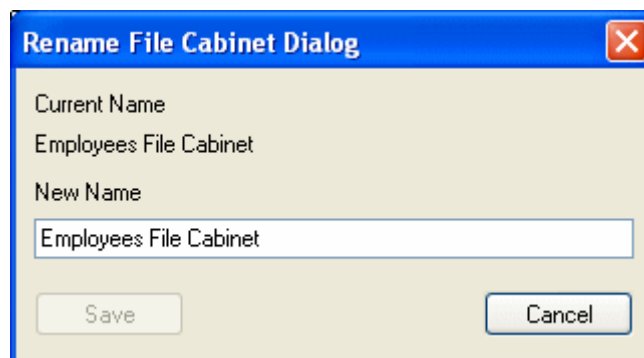
Renaming File Cabinets

File cabinet names are configured in the **File Cabinets** dialog box in OnBase Configuration. The following steps describe how to rename file cabinets displayed in the OnBase Client.

1. In OnBase Configuration, select **Document | File Cabinets**. The **File Cabinets** dialog box is displayed.



2. Double-click the file cabinet. The **Rename File Cabinet** dialog box is displayed.



3. Type a new name for the file cabinet.
4. Click **Save**.

Folder Filter Configuration

Folder filters are Custom Queries that can filter or sort documents in a folder, helping users find the documents they need. When applied to a folder, a filter can perform the following functions:

- Limit the displayed contents to documents indexed with a specific Keyword value. You can configure an HTML Custom Query to let users filter the documents by any Keyword Type mapped to the HTML form.
- Limit the displayed contents to a subset of Document Types. For example, a dynamic folder may have multiple Document Types assigned to it, but users need quick access to only specific Document Types on a regular basis.
- Organize and sort contents in a row and column format. A Custom Query can display information about each document in sortable columns.

Both standard and HTML Custom Queries can filter contents by Document Type. HTML Custom Queries also allow users to filter contents by Keyword value.

Note: Folder filters are not supported for Workflow folders if you are using the Classic Client interface for Workflow or web-based Workflow.

Configuring the Custom Query

Before making a filter available for folders, you must configure the Custom Query that will serve as the filter. A Custom Query cannot be used for both filtering and retrieving documents; once a Custom Query is configured as a folder filter, it is unavailable from the Custom Queries list in the OnBase Client and Web Client.

Both standard Custom Queries and HTML Custom Queries can filter folders, provided they have a Custom Query type of **Document Type** or **Document Type Group**. Standard Custom Queries will filter folder contents by the Document Types assigned to the query. HTML Custom Queries can filter folder contents using both the Document Types assigned to the query and the Keyword Types mapped to the HTML form.

If you use an HTML Custom Query, the HTML form is displayed when the filter is applied to the folder. If any Keyword Type fields are configured on the form, the user can filter folder contents by Keyword value.

The following procedure provides general guidelines for converting a Custom Query to a folder filter. For detailed information about configuring Custom Queries, see the Configuration module help under the heading “Queries and VB Scripts.”

1. In OnBase Configuration, select **Queries | Custom Queries**. The **Custom Query** dialog box is displayed.
2. Select the Custom Query to use as a folder filter.

Tip: To make the filter’s purpose clearer for users, ensure the name indicates what the filter does. To help you identify the filter from other Custom Queries in OnBase Configuration, use a naming convention that indicates the Custom Query is a folder filter. For example, append **FF** or **Folder Filter** to the Custom Query’s name.

3. Click **Settings**. The **Custom Query Options** dialog box is displayed.
4. Select **Folder Filter**.
If the **Folder Filter** option is unavailable, ensure none of the following options are selected:
 - **By Keyword** or **Custom Written SQL**, located under **Custom Query Type**
 - **Keyword Edit Fields** or **Text Search Button** located under **Optional Controls**These options are intended for document retrieval Custom Queries, not folder filters.
5. Click **Save**.
6. Continue configuring the Custom Query as described in the Configuration module help under the heading “Queries and VB Scripts.”

Note: You must assign Document Types or Document Type Groups to the filter, even if you are creating an HTML Custom Query that filters by Keyword value.

Note: Date ranges are supported only with HTML folder filters. Date ranges are not supported with non-HTML folder filters.

Note: The Note Count column is currently not supported for use with folder filters.

Assigning Filters to Folder Types

By default, every folder filter configured is available for every folder in the OnBase Client, including Workflow folders. Because not every filter will apply to every folder, you can restrict which filters are available for specific Folder Types. If no filters apply to a Folder Type, you can disable filters on that Folder Type altogether.

Folder Types also can be configured to apply a default filter. When users open a folder with a default filter applied, the folder's contents are displayed in a format like a Custom Query results list. Users can click column headers to sort by Keyword value or document property, such as document date. This option is useful for automatically organizing and sorting folder contents. Default filters are helpful also if users primarily work with a specific subset of Document Types in the folder.

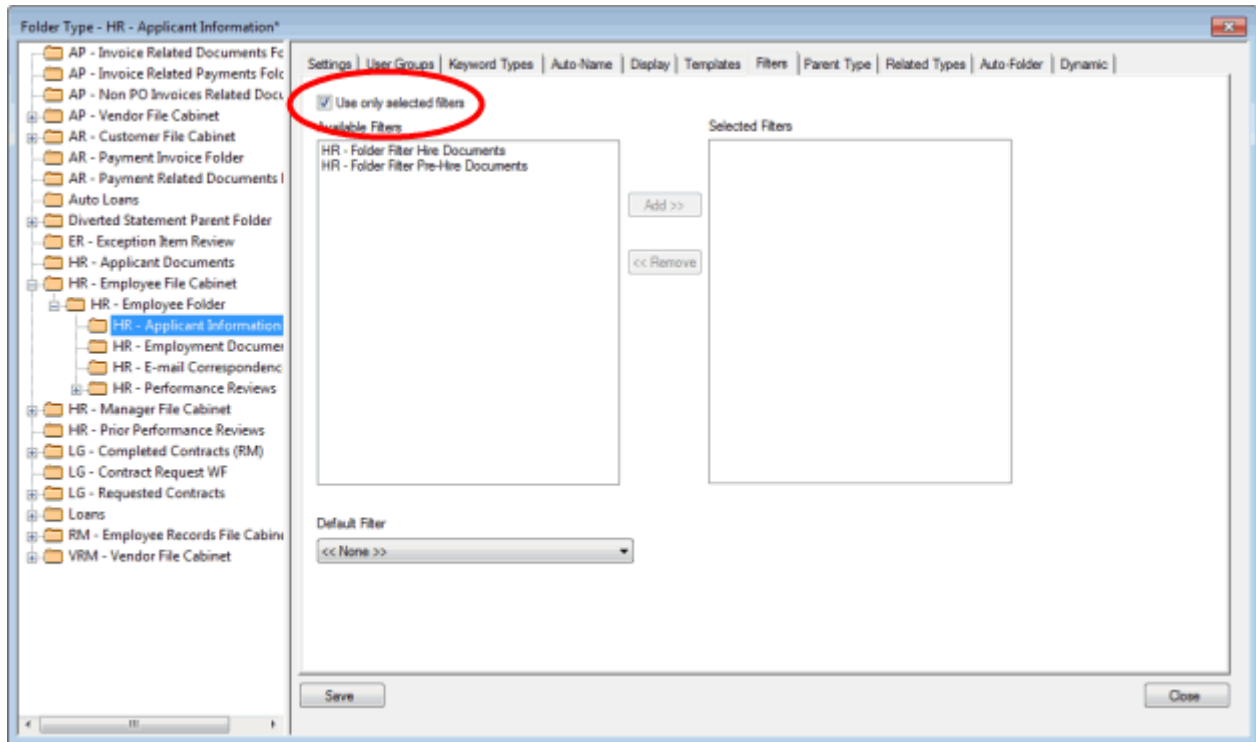
Note: Do not assign both a default filter and a default template to a Folder Type. A filter and a template cannot be simultaneously applied to a folder. If both are assigned to the Folder Type, the default filter is applied and the default template is ignored.

To assign a filter to a Folder Type, complete the following steps:

1. In OnBase Configuration, select **Documents | Folder Types**.
2. Select a Folder Type to configure filters for.
3. Click the **Filters** tab. The **Available Filters** list displays all folder filters that you have rights to view.

Note: If the Custom Query is not displayed in the list, ensure that it has the **Folder Filter** option selected in its configuration settings. See [Configuring the Custom Query on page 66](#).

- To limit the filters available for folders of this Folder Type, select **Use only selected filters**. Select this option also if you want to disable filters on this Folder Type.



- From **Available Filters**, select the filters to make available and click **Add**. To select multiple filters, press **CTRL** as you click. Only filters you have privileges to view are available.
To disable filters on this Folder Type, do not add any filters. Ensure also that **Use only selected filters** is selected.
- To assign a filter as the default filter, select it from the **Default Filter** drop-down list. The selected filter will be applied to folders by default. If the filter will prevent some documents from being displayed in the folder, ensure users understand how to remove a filter to display all documents.

Note: Default filters are only applied to Workflow folders in the Core-based OnBase Client and in the Unity Client. If the Workflow folder has a folder template configured, the folder template overrides the default filter. If the default filter of a Workflow folder is configured to display an HTML form, the form is not displayed when the queue is opened. Instead, only Document Types and display columns are applied. The filter must be applied to the Workflow folder manually within the Workflow interface in order for the HTML form to be displayed.

If you selected **Use only selected filters**, only the filters you selected for the Folder Type are available to assign as the default filter. Otherwise, all configured folder filters are available.

- Click **Save**.

Related Folder Type Configuration

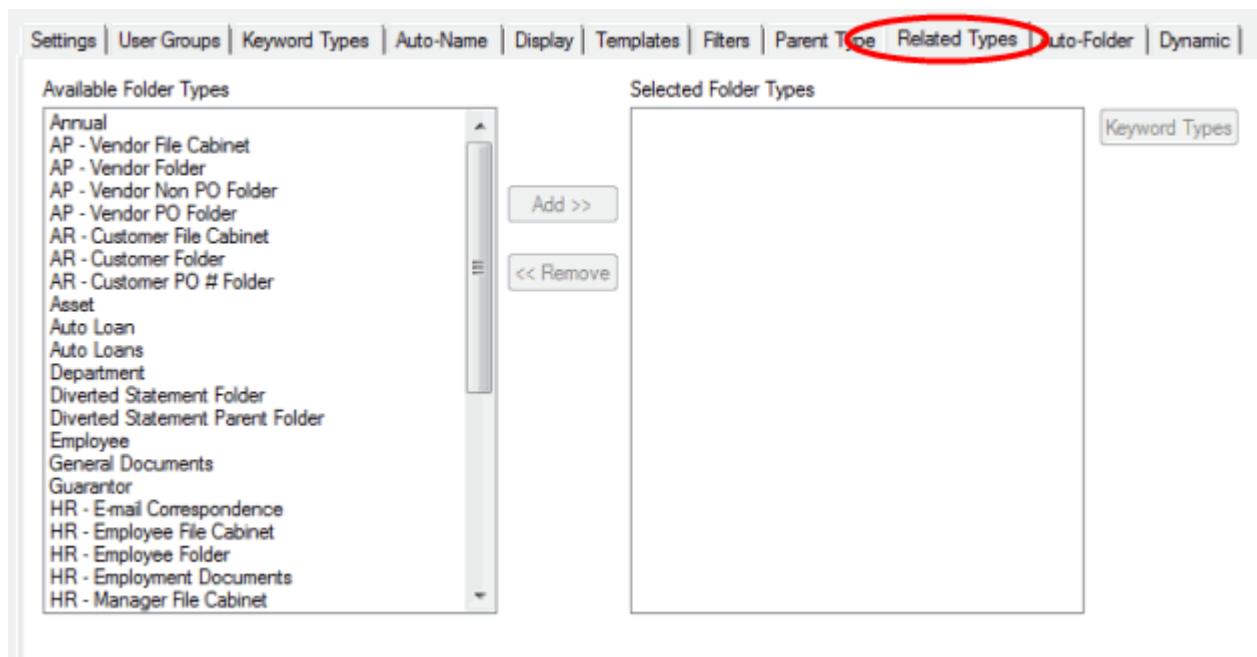
Related folders allow users to quickly access related information stored in different parts of the folder hierarchy.

For example, suppose your folder system has customer claims and customer policy information stored in different branches of the folder tree. If the policy folders are designated as related to the claim folders, then users can access each customer's policy folder directly from the claim folders.

Multiple Folder Types can be marked as related to a single Folder Type, and multiple Keyword Types can be used to define this relationship.

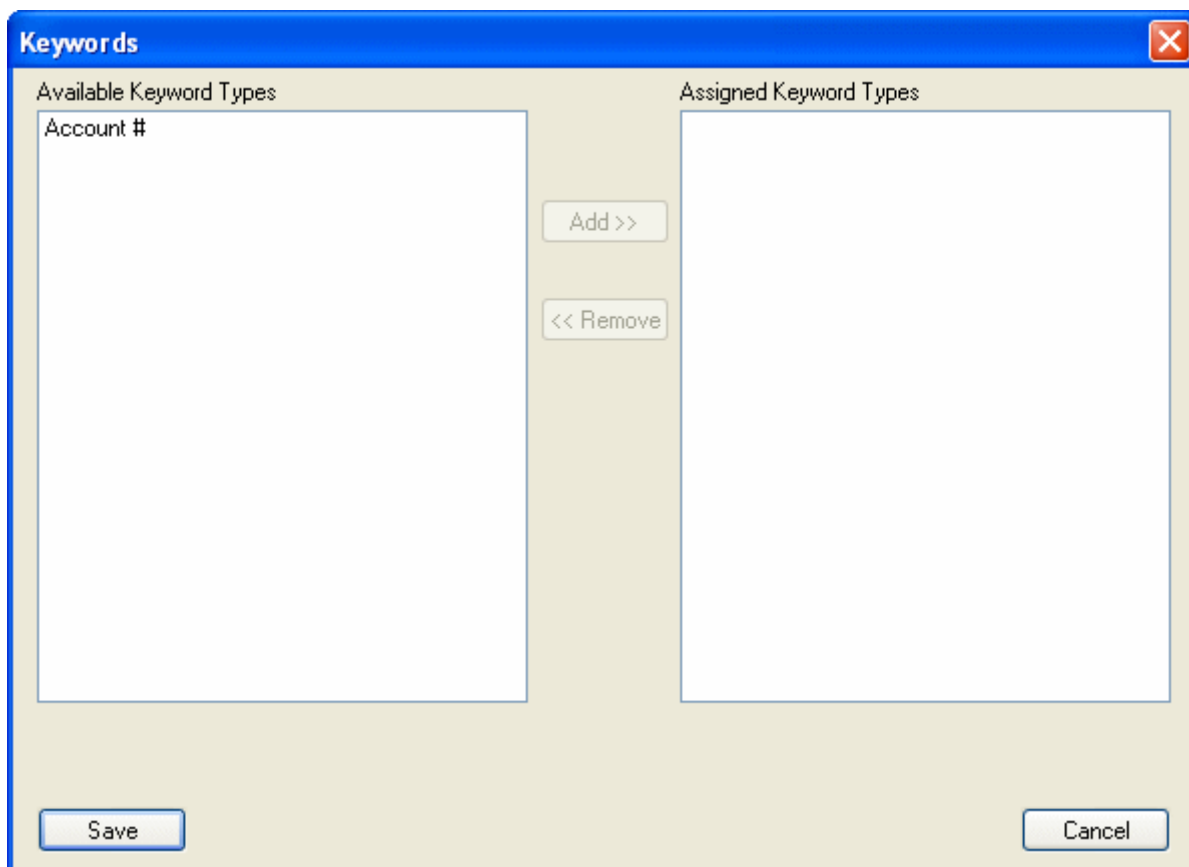
Note: Related Folder Types share a one-way relationship. For example, if the **Red** Folder Type is configured as related to the **Blue** Folder Type, then users can retrieve **Red** folders from **Blue** folders. However, users cannot retrieve **Blue** folders from **Red** folders, unless the **Blue** Folder Type is configured as related to the **Red** Folder Type.

1. Select the Folder Type from which users need to access related folders.
2. Click the **Related Types** tab.



Note: The **Related Types** tab is unavailable for Workflow folders. Related folders cannot be configured for Workflow folders.

3. Select a Folder Type you want to mark as related to the current Folder Type.
 - Workflow folders cannot be selected as related folders.
 - Date-based folders should not be used as related folders. If the current Folder Type or the related Folder Types are date-based, OnBase does not use the folder dates to determine which folders are related.
4. Click **Add**. The **Keywords** dialog box is displayed.



5. Select the Keyword Types to define the relationship. For example, customer account folders and customer transaction folders may be related by the **Account #** Keyword Type.
 - One or more Keyword Types can be selected. As a best practice, configure relationships using the minimum number of Keyword Type required to define the relationship.
 - See the examples following this procedure for expected behavior with various Keyword Type configurations.
6. Click **Save**.
7. Repeat steps 3–6 for each related Folder Type.

Tip: To change the Keyword Types defining a Folder Type's relationship, select the Folder Type and click **Keyword Types**.

8. Save the Folder Type configuration.

Keyword Type on Starting Folder Has Multiple Values

Suppose one Keyword Type has been configured for retrieving related folders. If the starting folder has multiple values for this Keyword Type, then OnBase returns related folders indexed with any of these values.

For example, if folders are related based on the **Customer Name** Keyword Type, and the starting folder has both John Adams and Abigail Adams as **Customer Name** values, then OnBase returns related folders with **Customer Name** values of either John Adams or Abigail Adams.

Starting Folder Has Multi-Instance Keyword Type Groups

Suppose the starting folder is assigned a Multi-Instance Keyword Type Group, and Keyword Types in this group are configured for retrieving related folders. In this situation, the expected behavior may vary.

1. If the related folders use the same Multi-Instance Keyword Type Group as the starting folder, then OnBase respects how Keyword Values are grouped on the starting folder.
For example, suppose the Multi-Instance Keyword Type Group has two Keyword Types: **[Color and Shape]**. If the starting folder is indexed with the values [Red, Circle] and [Blue, Square], then OnBase returns related folders indexed with the values [Red, Circle] or [Blue, Square]. Folders with values of [Red, Square] or [Blue, Circle] are not returned.
2. If the Keyword Types are assigned individually to the related folders, then OnBase returns folders with any combination of matching values.
For example, suppose the Multi-Instance Keyword Type Group on the starting folder has two Keyword Types: **[Color and Shape]**. The related folders are assigned the same Keyword Types, but not as a Multi-Instance Keyword Type Group.
If the starting folder is indexed with the values [Red, Circle] and [Blue, Square], then OnBase returns related folders indexed with any of the following combinations of values:
 - Red, Circle
 - Red, Square
 - Blue, Circle
 - Blue, Square

Starting Folder Has Some Blank Keyword Values

Suppose multiple Keyword Types have been configured for retrieving related folders. If the starting folder has values for only some of these Keyword Types, then OnBase retrieves related folders based on the Keyword Types that have values.

For example, suppose a customer folder has related folders set up based on the **Account #** and **Customer Name** Keyword Types. If the customer folder has an **Account #** value but not a **Customer Name** value, then related folders are retrieved based only on the **Account #** value. The related folders' **Customer Name** values are ignored.

Starting Folder Has No Related Keyword Values

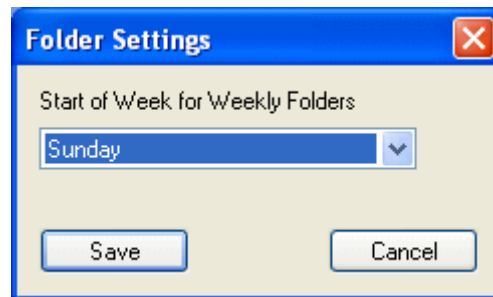
Suppose one or more Keyword Types have been configured to retrieve related folders. If the starting folder has no values for any of these Keyword Types, then users cannot retrieve related folders from the starting folder.

Weekly Folder Settings

For Folder Types with a date range of **Weekly**, you can change the day used as the start of the week. By default, the start of the week is set to Sunday. You may want to change this setting to accommodate locales where Monday is considered the start of the week.

Changing this setting does not affect existing folders. If OnBase already contains folders with weekly date ranges, then these folders are based on the start of the week that was configured when the folders were created.

1. In Configuration, select **Users | Folder Settings**. The **Folder Settings** dialog box is displayed.



2. Select the first day of the week for weekly folders.
3. Click **Save**.

Folder Templates

Folder templates can help users navigate a folder's contents by doing the following:

- Sorting documents in a consistent order.
- Identifying documents that are missing from a folder.
- Identifying documents that are missing certain Keyword values, which may have been unavailable when the documents were indexed.
- Filtering the folder to display only documents that satisfy specific criteria.

By automatically performing these tasks, folder templates can contribute to the overall efficiency of your solution.

For example, suppose every Employee Records folder must contain a specific set of documents, including the employee's I-9 form. To help your HR department identify whether an employee's I-9 is missing, you can configure the folder template to display a message in red text if the **I-9 Form** Document Type is not in the employee's folder. The same template can identify when other necessary documents are missing, such as the employee's W4 or emergency contact information.

Templates also can automatically filter and sort documents when a user opens a folder. For example, suppose a folder contains many documents, some of which are accessed frequently, and others that are accessed rarely. A folder template can be used to display only the documents that users access most often. If you assign the folder template as the default template for a Folder Type, then all folders based on that Folder Type will have the template applied automatically when they are opened in the OnBase Client.

When users need to view all documents in a folder, they can remove the template. You can also configure a template to show all documents that do not meet the template criteria. These documents would then be displayed after the template documents.

Folder templates work well with folders containing many Document Types. Depending on your objective, templates may not be the best choice for managing folder contents. For example, if users want to find a folder document by Keyword value, you can configure an HTML Custom Query as a folder filter. For information about folder filters, see [Folder Filter Configuration on page 66](#).

Creating a New Folder Template

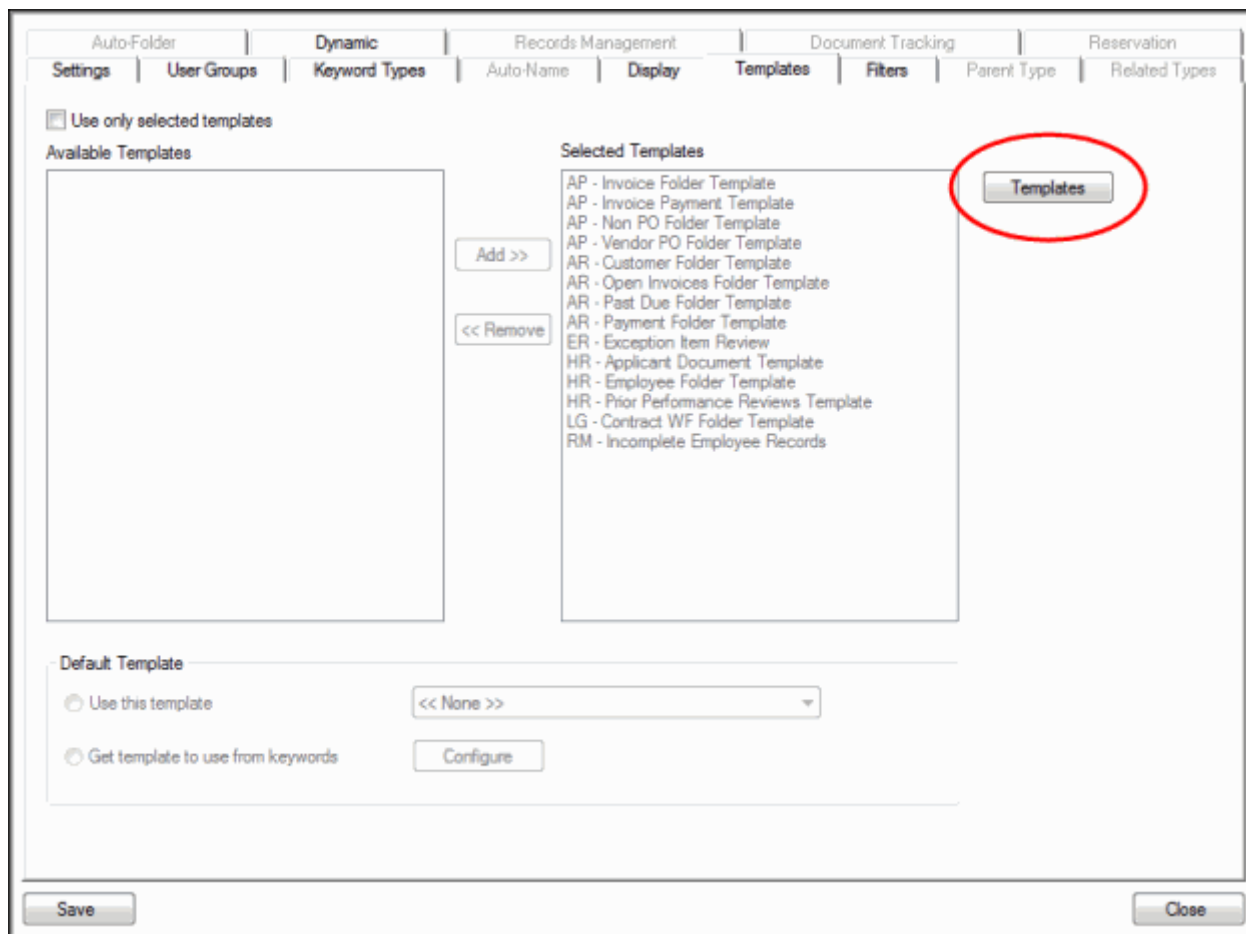
Before configuring folder templates, outline what you want the template to accomplish. This outline will help you configure the template.

After creating a new template, see the following sections to configure the template as needed:

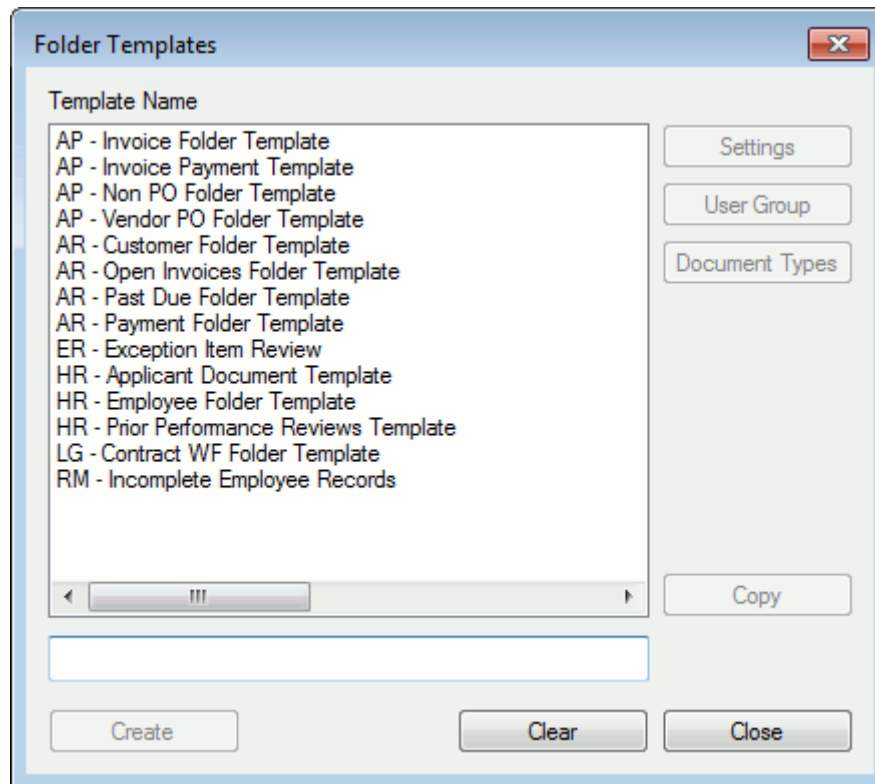
- [Assigning Document Types to a Template on page 77](#)
- [Configuring Keyword Type Criteria for a Document Type on page 79](#)
- [Configuring how Documents are Displayed Using a Template on page 84](#)
- [Adding Missing Item Messages on page 84](#)
- [Assigning Specific Templates to a Folder Type on page 87](#)
- [Assigning User Groups to a Template on page 95](#)

To create a new folder template:

1. Do one of the following:
 - Select **Document | Folder Templates**.
 - From Folder Type configuration, click the **Templates** tab. Then, click the **Templates** button. This method is convenient if the template will be the default template for the selected Folder Type.



The **Folder Templates** dialog box is displayed.



2. From the **Folder Templates** dialog box, type a name for the new folder template in the field provided.
3. Click **Create**. The template is added to the list.
4. Continue to [Assigning Document Types to a Template on page 77](#).

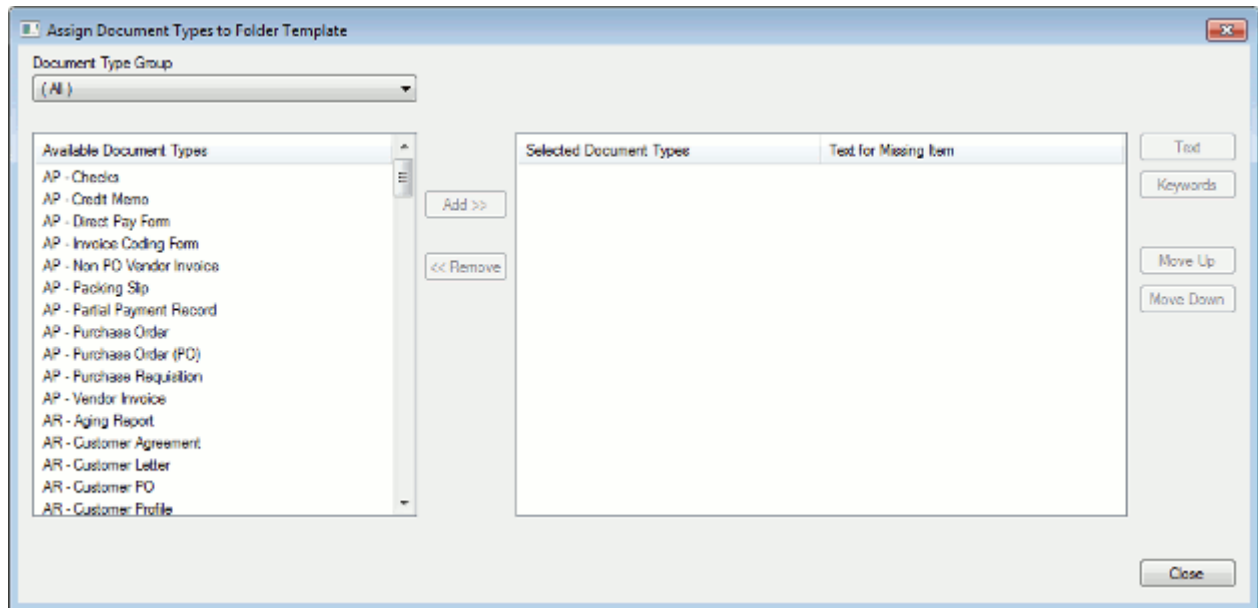
Assigning Document Types to a Template

A folder template is assigned specific Document Types. When the template is applied, documents from the configured Document Types are displayed to a user. Missing text placeholders may also be displayed, if documents from certain Document Types are not accounted for and missing item messages are configured.

Depending on template configuration, the template may only display the template Document Types, or it may display template Document Types followed by all other documents in the folder. For more information, see [Configuring how Documents are Displayed Using a Template on page 84](#).

To assign Document Types to a template:

1. From the **Folder Templates** dialog box, select a template.
2. Click **Document Types**. The **Assign Document Types to Folder Template** dialog box is displayed.



3. To narrow the list of available Document Types, select the appropriate Document Type Group from the **Document Type Group** drop-down list.
4. Select one or more Document Types from the **Available Document Types** list.
5. Click **Add**. The Document Types are added to the **Selected Document Types** list.

Tip: Add more than one entry for the same Document Type when Keyword Type value criteria is required for either one or another value of the same Keyword Type. For more information on this concept, see [Configuring a Document Type to Allow for Two or More Unique Values on page 82](#).

To remove one or more Document Types from the template, select them from the **Selected Document Types** list and click **Remove**.

6. To have the template display documents in a specific order, select a Document Type from the **Selected Document Types** list and click **Move Up** or **Move Down** to move the Document Type to the intended position.
7. To configure Keyword Type criteria for the Document Types, see [Configuring Keyword Type Criteria for a Document Type on page 79](#).

Configuring Keyword Type Criteria for a Document Type

You can configure folder template Document Types to require specific criteria for Keyword Type values. When the template is applied, documents meeting the criteria are displayed; documents that do not meet the criteria are either hidden or displayed after the template documents, depending on template configuration.

Note: These steps are not necessary if documents of template Document Types should be displayed regardless of Keyword Type values.

To configure Keyword Type criteria for a template Document Type:

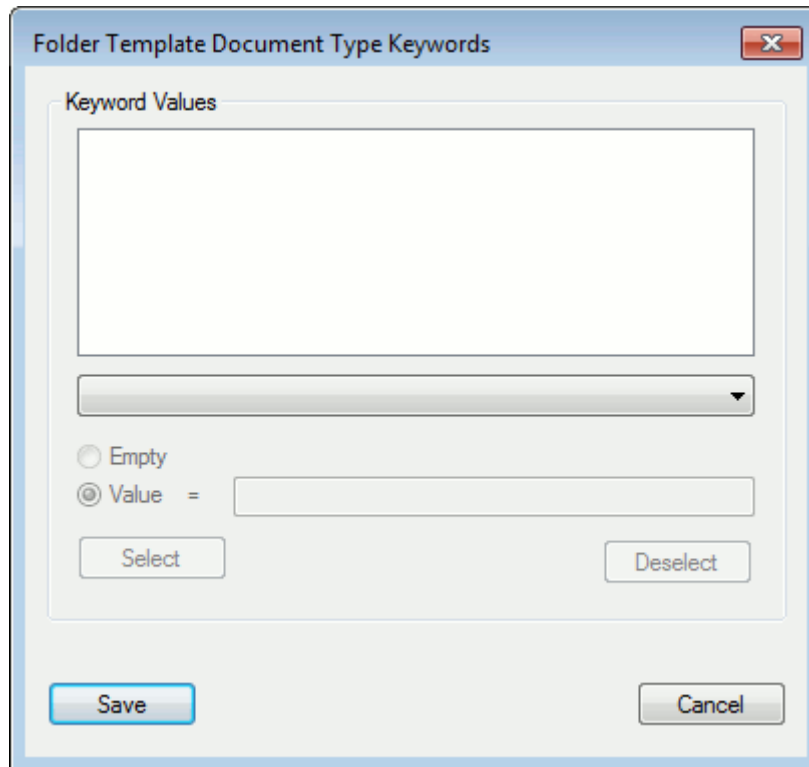
1. From the **Assign Document Types to a Folder Template** dialog box, select a Document Type from the **Selected Document Types** list.

Selected Document Types	Text for Missing Item
AP - Purchase Order	<red>...Purchase Order not found for this Inv...
AP - Packing Slip	<red>...Packing Slip not found for this Invoic...
AP - Purchase Requisition	
AP - Credit Memo	

Buttons on the right: Text, Keywords, Move Up, Move Down

- Click the **Keywords** button.

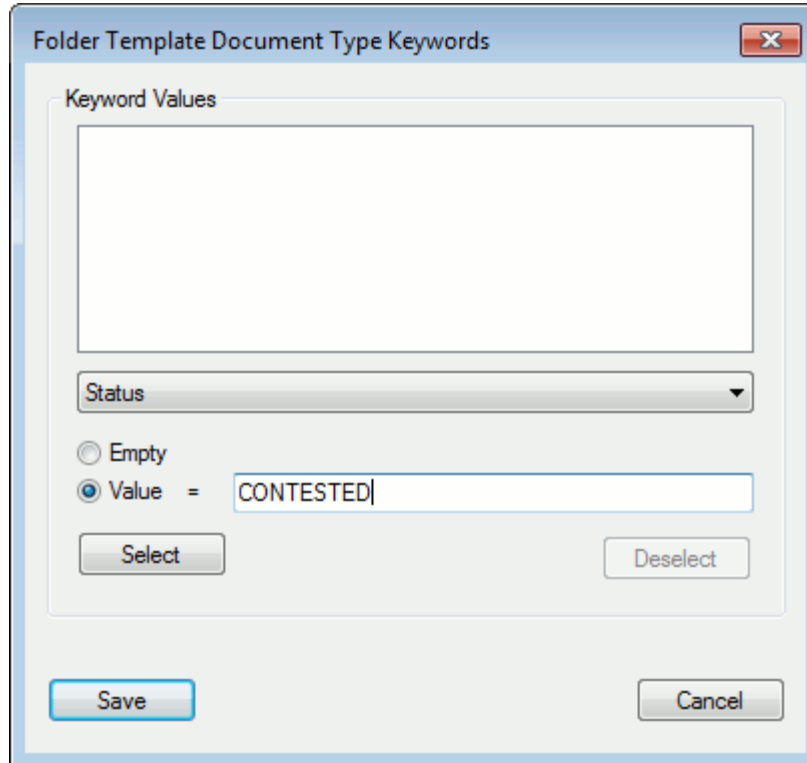
The **Folder Template Document Type Keywords** dialog box is displayed.



- From the drop-down list, select a Keyword Type to be used in determining whether documents should be displayed.
- Select one of the following options:

Option	Description
Empty	<p>Select to have the template display documents of the selected Document Type only if they are missing a value for the selected Keyword Type. This option helps users identify documents missing values that were unavailable when the documents were initially indexed.</p> <hr/> <p>Note: If the Keyword Type is in a Multi-Instance Keyword Type Group, then the template displays documents that are missing a value for the Keyword Type in any instance of the Keyword Type Group.</p> <hr/>
Value	<p>Select to have the template display documents of the selected Document Type only if they have a specific value for the selected Keyword Type. You will provide this value in the next step.</p>

5. If you selected **Value** in the previous step, enter the required Keyword Type value. Documents must be indexed with this value to be displayed within the folder template.



6. Click **Select**. The Keyword Type and value are added to the **Keyword Values** list. To remove a value from the **Keyword Values** list, select it and click the **Deselect** button.
7. Repeat the process as necessary to add additional Keyword criteria for the Document Type. See the following considerations for adding more than one criterion for the selected Document Type entry:
 - If you configure multiple Keyword Type values for the selected Document Type, the template displays a document of that Document Type only if the document satisfies all criteria in the **Keyword Values** pane.
 - If you configure multiple values for a Keyword Type, the template displays a document of that Document Type only if that document is indexed with all of the configured values.

Tip: Add more than one entry for the same Document Type when Keyword Type value criteria is required for either one or another value of the same Keyword Type. For more information on this concept, see [Configuring a Document Type to Allow for Two or More Unique Values on page 82](#).

Configuring a Document Type to Allow for Two or More Unique Values

Folder templates can allow for documents of Document Types to be indexed with one value or another value for the same Keyword Type. This means that a document only needs to be indexed with one of the specified values to be displayed within the folder template.

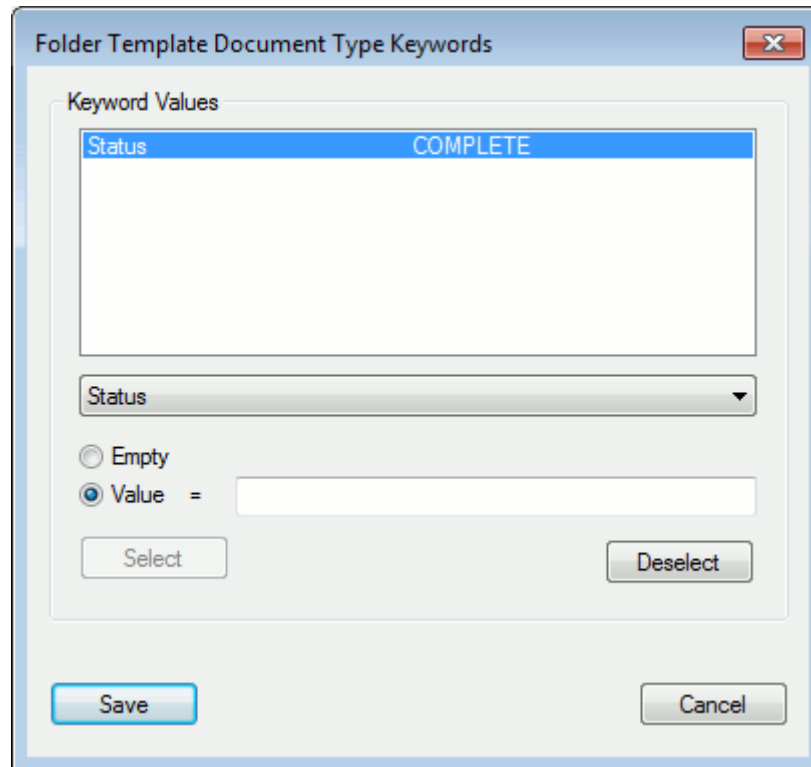
For example, if the **AP - Vendor Invoice** Document Type includes the **Status** Keyword Type, and you want the template to display invoices that have a value of either **Complete** or **Partially Complete** for the **Status** Keyword Type, then you would add two entries for the **AP - Vendor Invoice** Document Type.

Selected Document Types	Text for Missing Item
AP - Purchase Order	<red>...Purchase Order not found for this Inv...
AP - Packing Slip	<red>...Packing Slip not found for this Invoic...
AP - Vendor Invoice	<red>%N</red>
AP - Vendor Invoice	<red>%N</red>

For each **AP - Vendor Invoice** Document Type, you would select the **Status** Keyword Type; however, you would enter **Complete** as one of the values and **Partially Complete** as the other value. This is different than assigning both values to a single entry of the Document Type, which would require the document to be indexed with both values, instead of one or the other.

See the following screen shots for more information on configuring two separate values for a Document Type. Note that these Keyword Type values appear in separate dialog boxes.

AP - Vendor Invoice Configuration #1



Folder Template Document Type Keywords

Keyword Values

Status	COMPLETE
--------	----------

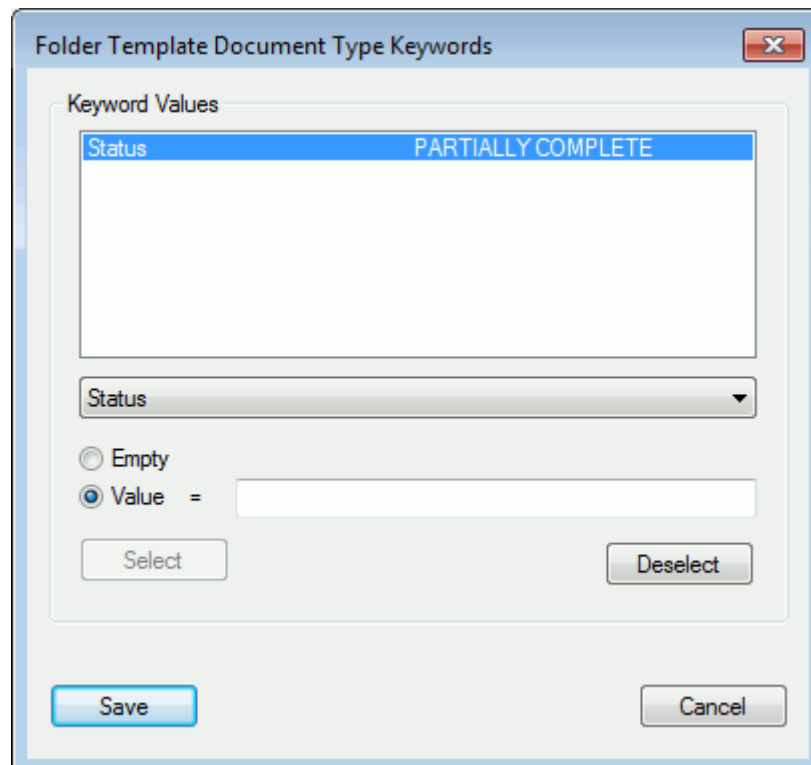
Status

☐ Empty
☒ Value =

Select Deselect

Save Cancel

AP - Vendor Invoice Configuration #2



Folder Template Document Type Keywords

Keyword Values

Status	PARTIALLY COMPLETE
--------	--------------------

Status

☐ Empty
☒ Value =

Select Deselect

Save Cancel

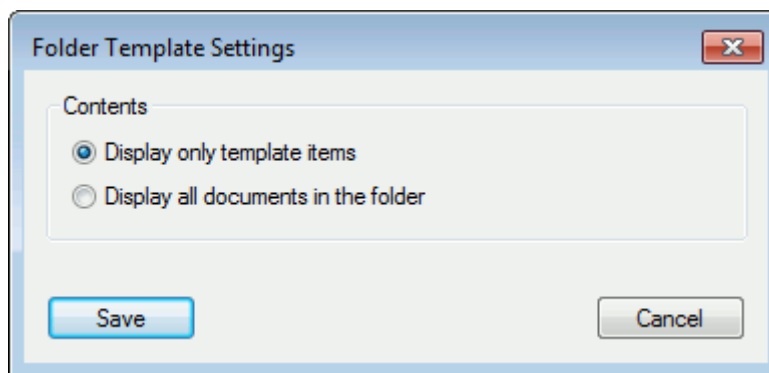
Configuring how Documents are Displayed Using a Template

When configuring a folder template, you can determine whether all documents are displayed in a folder using this template.

To configure how documents are displayed using a template:

1. From the **Folder Templates** dialog box, click the **Settings** button.

The **Folder Template Settings** dialog box is displayed.



2. Select one of the following options:

Option	Description
Display only template items	<p>The template displays only documents that meet the configured template criteria. All other documents in the folder are hidden.</p> <hr/> <p>Note: When creating a new template, this option is selected by default.</p> <hr/>
Display all documents in the folder	<p>The template displays all documents contained in the folder. The documents meeting the template criteria are listed first, followed by any documents that do not meet the template criteria.</p> <p>Documents that do not meet the template criteria are ordered according to the folder Document Type order.</p>

3. Click **Save**.

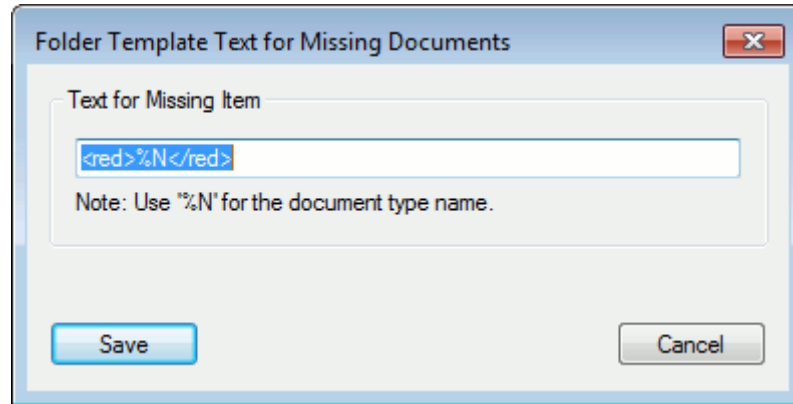
Adding Missing Item Messages

You can configure a missing item message for a template Document Type. When a document specified by a template is not contained in a folder, this text serves as a placeholder for the document not yet added to the folder.

To add missing item messages to template Document Types:

1. From the **Assign Document Types to Folder Template** dialog box, select one or more Document Types from the **Selected Document Types** list.
2. Click the **Text** button.

The **Folder Template Text for Missing Documents** dialog box is displayed.



3. In the **Text for Missing Item** field, type a message for the template to display when folder contains no documents that satisfy the configured criteria. You can type **%N** to insert the Document Type name. For example, if you are configuring a missing message for AP - Packing Slip, you could type **Missing %N**. The text displayed to the user would be **Missing AP - Packing Slip**.
If the selected Document Types have no Keyword criteria, this message is displayed when the folder does not contain any documents of the selected Document Types.
4. Format the Text for Missing Item message, if necessary. See [Formatting Missing Item Messages on page 86](#).

- Click **Save**. The text is applied to the selected Document Types and displayed in the **Text for Missing Item** column.

Selected Document Types	Text for Missing Item
AP - Checks	<red>Missing %N</red>
AP - Credit Memo	<red>%N</red>
AP - Non PO Vendor Invoice	<red>%N</red>
AP - Packing Slip	<red>Missing %N</red>
AP - Purchase Order	<red>Missing %N</red>
AP - Purchase Requisition (E-Form)	<red>%N</red>
AP - Vendor Invoice	<red>Missing %N</red>

Formatting Missing Item Messages

Apply formatting tags to the **Text for Missing Item** to make the item's absence more noticeable in the OnBase Client. Place the opening tag before the text being formatted. Place the closing tag after the text being formatted. The closing tag has a forward slash within the angled brackets, as shown in the table below.

Note: Formatting tags apply only to folder templates used in the OnBase Client, Web Client, and Unity Client. For more differences between OnBase client applications, see [Folder Feature Support on page 175](#).

Formatting Tag	Description
<BOLD></BOLD>	Makes the enclosed text bold. For example, to have the word "I-9" displayed in bold, type: Missing <BOLD>I-9</BOLD>
<COLOR></COLOR>	Displays the enclosed text in the specified color. For example, to display the words "Missing I-9" in red, type: <RED>Missing I-9</RED> Supported colors are red, green, blue, yellow, cyan, magenta, black, gray, and white. Avoid using white; white text is unreadable until the text is selected.

Formatting Tag	Description
<ITALIC></ITALIC>	Italicizes the enclosed text. For example, to italicize the words "Missing I-9," type: <ITALIC>Missing I-9</ITALIC>
<STRIKE></STRIKE> Or <K></K>	Strikes out the enclosed text with a horizontal line. For example, to strike out the word "I-9," type: <STRIKE>I-9</STRIKE> Or: <K>I-9</K>

Assigning Specific Templates to a Folder Type

By default, all available folder templates are assigned to a newly created Folder Type. This means that a user is able to select a template from all available templates, regardless of whether the templates were created to be used for the Folder Type they are being applied to.

To allow for only a specific group of templates to be available for a Folder Type:

1. In OnBase Configuration, select **Document | Folder Types**. The **Folder Type** configuration dialog box is displayed.
2. Select the Folder Type.
3. Click the **Templates** tab.
4. Select the **Use only selected templates** option. All of the templates in the **Selected Templates** list are transferred to the **Available Templates** list.

Settings | User Groups | Keyword Types | Auto-Name | Display | **Templates** | Filters | Parent Type | Related Types | Auto-Folder

☒ Use only selected templates

Available Templates

- AP - Invoice Folder Template
- AP - Invoice Payment Template
- AP - Non PO Folder Template
- AP - Vendor PO Folder Template
- AR - Customer Folder Template
- AR - Open Invoices Folder Template
- AR - Past Due Folder Template
- AR - Payment Folder Template
- ER - Exception Item Review
- HR - Applicant Document Template
- HR - Employee Folder Template
- HR - Prior Performance Reviews Template
- LG - Contract WF Folder Template
- RM - Incomplete Employee Records

Add >>

<< Remove

Selected Templates

5. To add a template to the Folder Type, select the template from the **Available Templates** list and click **Add**.

To remove a template from the Folder Type, select the template from the **Selected Templates** list and click **Remove**.

6. Click **Save**.

For information on assigning a default template to the Folder Type, see the next section.

Assigning a Default Template to a Folder Type

A default folder template is one that may be applied automatically upon opening a folder. A default template can be either fixed or determined when a user opens a folder. A fixed default folder template is the same template for all users accessing the folder, provided the users have rights to the template. A default folder template determined when the folder is opened relies on configured template patterns to select the correct default template.

For more information on configuring default templates, see the following sections

- [Assigning a Fixed Default Template on page 88](#)
- [Assigning Default Templates Using Patterns on page 89](#)

Assigning a Fixed Default Template

A fixed default folder template is always automatically applied to an open folder, provided a user accessing the folder has rights to the template. The template is the same for every privileged User Group. You can assign a fixed default template to a Folder Type as long as one or more templates are listed in the Folder Type's **Selected Templates** list. For more information on selecting available templates for a Folder Type, see [Assigning Specific Templates to a Folder Type on page 87](#).

Note: Do not assign both a default filter and a default template to a Folder Type. A filter and a template cannot be simultaneously applied to a folder. If both are assigned to the Folder Type, the default filter is applied and the default template is ignored. For information about filters, see [Folder Filter Configuration on page 66](#).

To assign a fixed default template:

1. In OnBase Configuration, select **Document | Folder Types**. The **Folder Type** configuration dialog box is displayed.
2. Select the appropriate Folder Type.
3. Click the **Templates** tab.

4. Select the **Use this template** option in the **Default Template** section.

Note: The **Default Template** options are disabled for Workflow folders. A default template can only be applied within OnBase Studio. For more information on assigning a default template to a Workflow folder, see the Workflow module reference guide or help file.

☐ Use only selected templates

Available Templates

Selected Templates

Add >>

<< Remove

AP - Invoice Folder Template
 AP - Invoice Payment Template
 AP - Non PO Folder Template
 AP - Vendor PO Folder Template
 AP - Vendor PO Folder Template
 AR - Customer Folder Template
 AR - Open Invoices Folder Template
 AR - Past Due Folder Template
 AR - Payment Folder Template
 ER - Exception Item Review
 HR - Applicant Document Template
 HR - Employee Folder Template
 HR - Prior Performance Reviews Template
 LG - Contract WF Folder Template
 RM - Incomplete Employee Records

Default Template

☒ Use this template << None >>

☐ Get template to use from keywords Configure

5. From the drop-down list, select a template configured for the folder.
6. Click **Save**.

Assigning Default Templates Using Patterns

A default template can be applied to a folder using configured template patterns. A template pattern contains text, Keyword Type variables, or both. Valid patterns match up with one or more existing template names.

Using template patterns requires careful planning and configuration. Before configuring template patterns, ask yourself these questions:

- Should the default template be applied to a folder based on an existing folder keyword value? If so, ensure the appropriate templates are named in a way that incorporates values from a Keyword Type.
- Should the default template be applied to a folder based on the user opening the folder? If so, ensure the appropriate templates are assigned the correct User Groups.
- Should the default template be selected based on both a folder keyword value and the user accessing the folder? If so, ensure the appropriate templates are both named and assigned accordingly.

Once you identify the group of possible default templates for a Folder Type, configure one or more template patterns.

Note: Template patterns do not require templates to be selected for a Folder Type. In other words, any existing template can be used as possible default templates in this scenario.

To configure template patterns for a Folder Type:

1. In OnBase Configuration, select **Document | Folder Types**. The **Folder Type** configuration dialog box is displayed.
2. Select the appropriate Folder Type.
3. Click the **Templates** tab.

4. Select the **Get template to use from keywords** option in the **Default Template** section.

Note: The **Default Template** options are disabled for Workflow folders. A default template can only be applied within OnBase Studio. For more information on assigning a default template to a Workflow folder, see the Workflow module reference guide or help file.

☐ Use only selected templates

Available Templates

Selected Templates

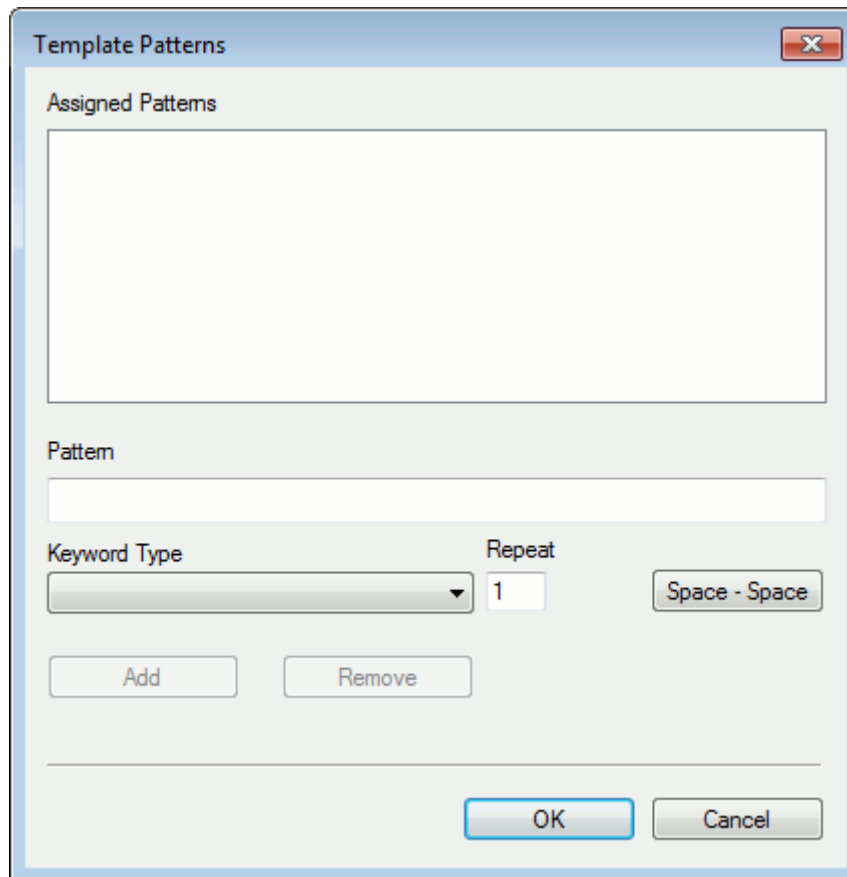
AP - Invoice Folder Template
AP - Invoice Payment Template
AP - Non PO Folder Template
AP - Vendor PO Folder Template
AP - Vendor PO Folder Template
AR - Customer Folder Template
AR - Open Invoices Folder Template
AR - Past Due Folder Template
AR - Payment Folder Template
ER - Exception Item Review
HR - Applicant Document Template
HR - Employee Folder Template
HR - Prior Performance Reviews Template
LG - Contract WF Folder Template
RM - Incomplete Employee Records

Add >>
<< Remove

Default Template

☒ Use this template << None >>
☐ Get template to use from keywords Configure

5. Click the **Configure** button.
The **Template Patterns** dialog box is displayed.



6. Enter a valid pattern in the **Pattern** field. A valid pattern will match up with one or more existing folder template names. Use the **Keyword Type** drop-down list, **Repeat** field, and **Space - Space** button as needed.

Element	Description
Keyword Type	Inserts the Keyword Type of the corresponding keyword value included in the template name (if applicable).
Repeat	Inserts the number of times a selected Keyword Type should repeat (i.e., if there is more than one consecutive value for a Keyword Type in the template name, the number of values should be entered in this field). This value must be entered before selecting the Keyword Type.
Space - Space	Inserts a space, hyphen, and another space.

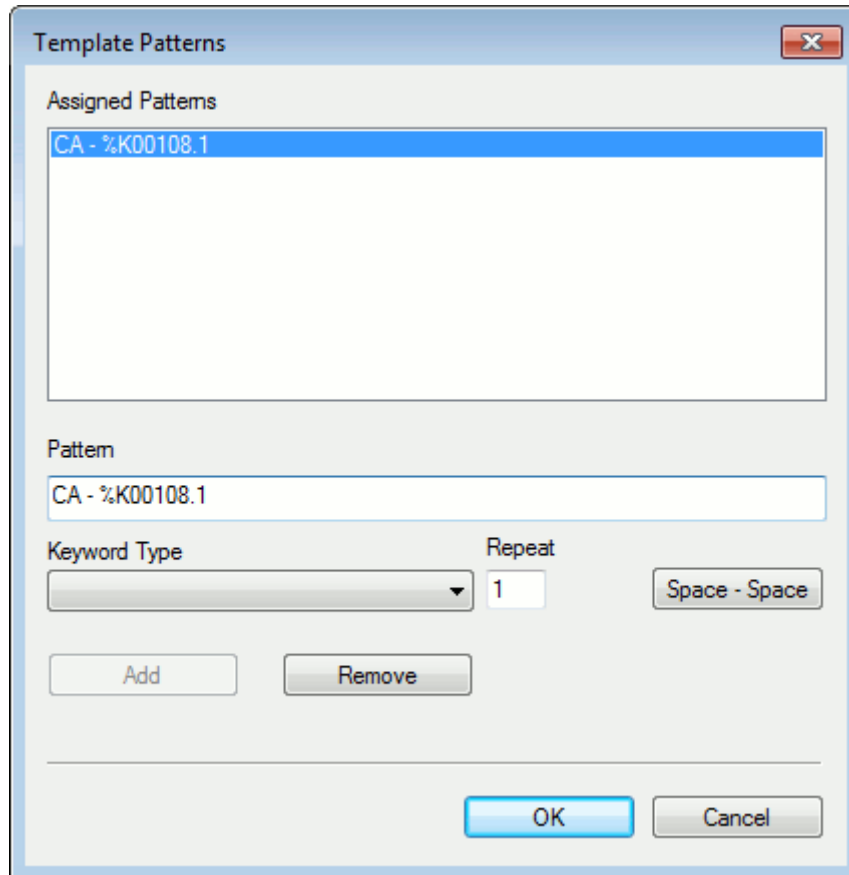
For example, you have created the **CA - Delivered** and **CA - Canceled** templates, where **Delivered** and **Canceled** are values of the **Status** Keyword Type. To include these as possible default templates, you would do the following:

- a. Enter **CA** in the **Pattern** field.
- b. Click the **Space - Space** button.
- c. Select the **Status** Keyword Type from the **Keyword Type** drop-down list.

Note: The **Pattern** field is not case-sensitive; however, all other factors (i.e., spacing, spelling, selected Keyword Type, and Keyword Type repeat) must match the format of at least one template name. Otherwise, the pattern is not able to apply a default template.

7. Click **Add**.

The template pattern is added to the **Assigned Patterns** list.



8. Add more patterns as necessary to account for each possible default template for this Folder Type.
9. Click **OK**.
10. From the **Folder Type** configuration dialog box, click **Save**.

Considerations for Using Template Patterns

Like all folder templates, default templates applied using patterns respect User Group privileges. This security check is especially important in fully understanding how template patterns apply default templates.

Tip: If certain User Groups only need to view specific sets of documents in a folder, a different default template can be applied for each User Group that has access to the folder.

When a user opens a folder configured to use template patterns:

- A default template is automatically applied when only one template satisfies all criteria.

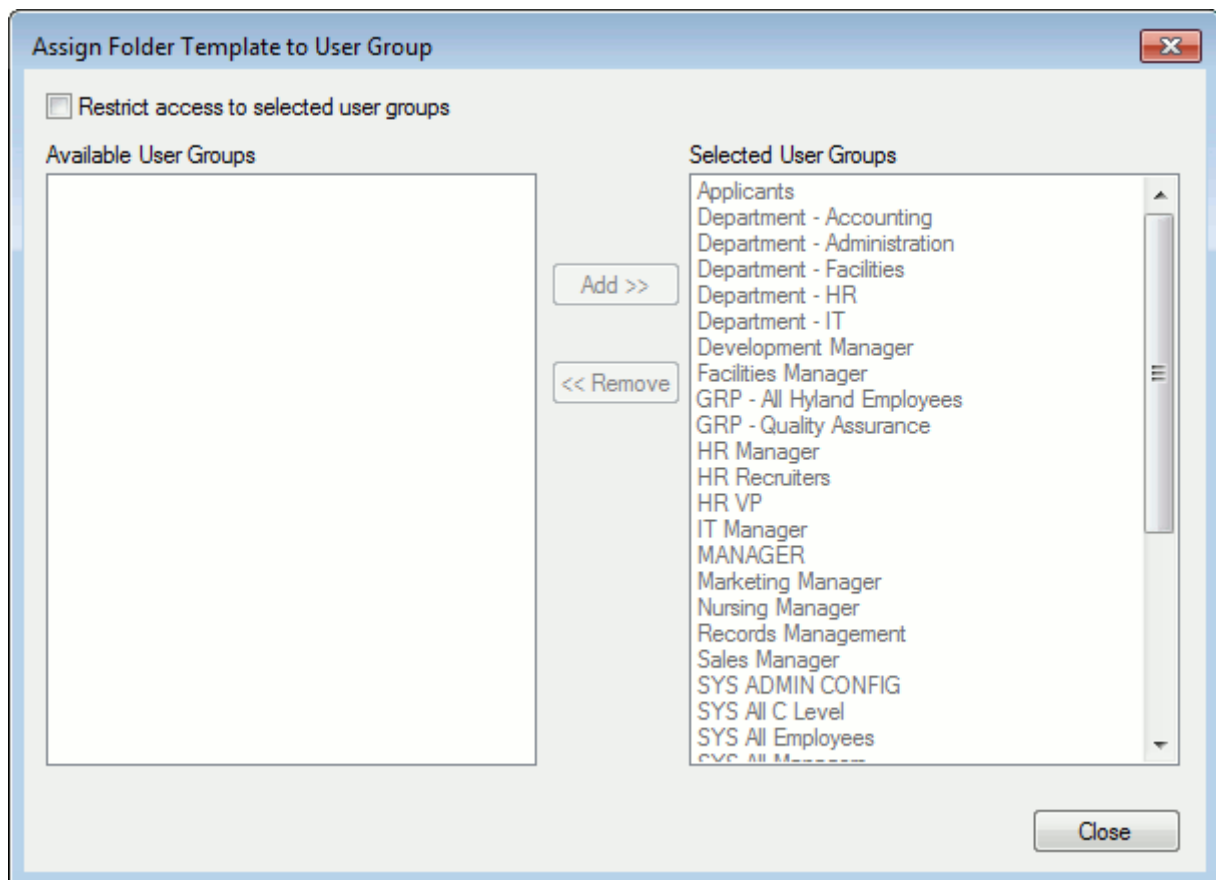
- A default template is not automatically applied when two or more templates satisfy all criteria. These templates can only manually be applied by the user.
For example, the user belongs to a User Group that is assigned two possible default templates for the folder. A default template is not applied, because there can only be one default template.
- A default template is neither applied nor available when no templates satisfy the criteria.
If this occurs, ensure the pattern is correct, and that the appropriate User Groups are assigned to the possible templates.

Criteria includes a valid template pattern, a matching keyword value for both the folder and corresponding template name (if applicable), and appropriate User Group privileges.

Assigning User Groups to a Template

By default, after creating a folder template, it is available to all User Groups. To specify which User Groups should have access to the template:

1. From the **Folder Templates** dialog box, select a template.
2. Click **User Group**. The **Assign Folder Template to User Group** dialog box is displayed.



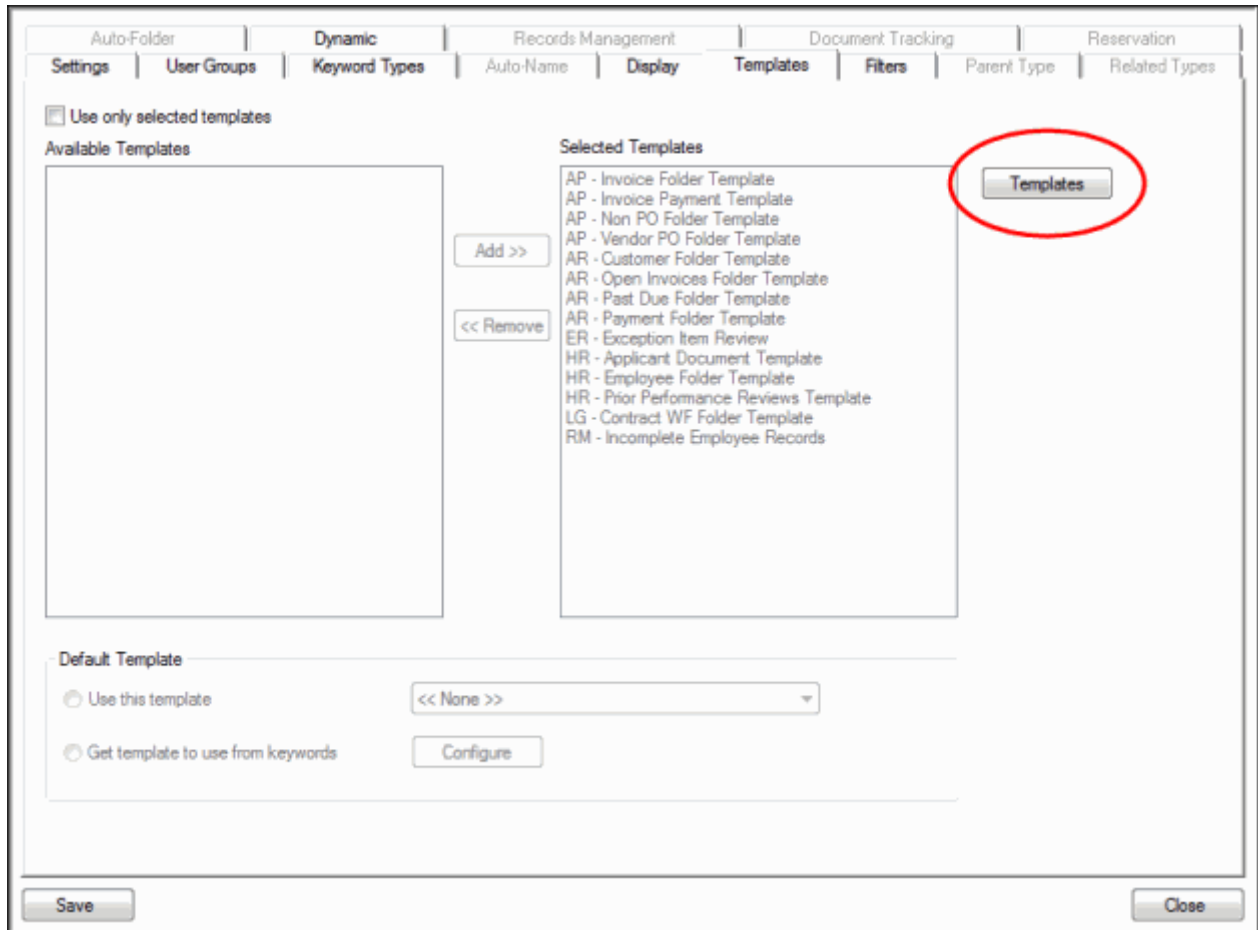
3. Select the **Restrict access to selected user groups** option if it is not already selected. All User Groups in the **Selected User Groups** list are moved to the **Available User Groups** list.
4. To grant certain User Groups access to the template, select one or more User Groups from the **Available User Groups** list and click **Add**.
To restrict certain User Groups access from the template, select one or more User Groups from the **Selected User Groups** list and click **Remove**.
5. Click **Close** when you are finished.

Copying a Folder Template

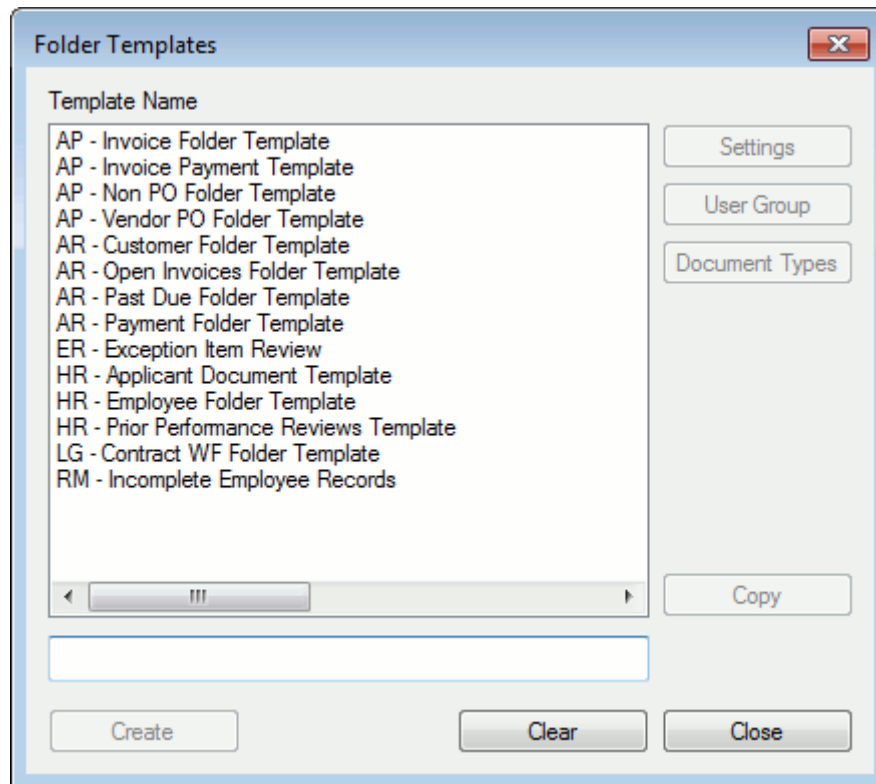
Copying a folder template creates a new template based off the configuration of an existing template.

To copy a folder template:

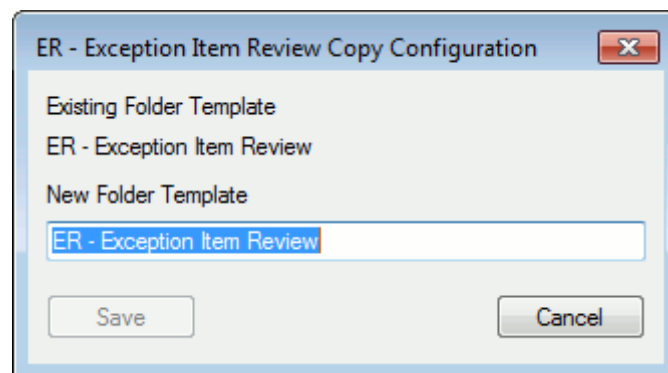
1. Do one of the following:
 - Select **Document | Folder Templates**.
 - From Folder Type configuration, click the **Templates** tab. Then, click the **Templates** button. This method is convenient if the template will be the default template for the selected Folder Type.



The **Folder Templates** dialog box is displayed.



2. Select the template you would like to copy.
 3. Click the **Copy** button.
- The **Copy Configuration** dialog box is displayed.



4. Enter the name of the new template.
5. Click **Save**. The template is added to the list.

Deleting a Folder Template

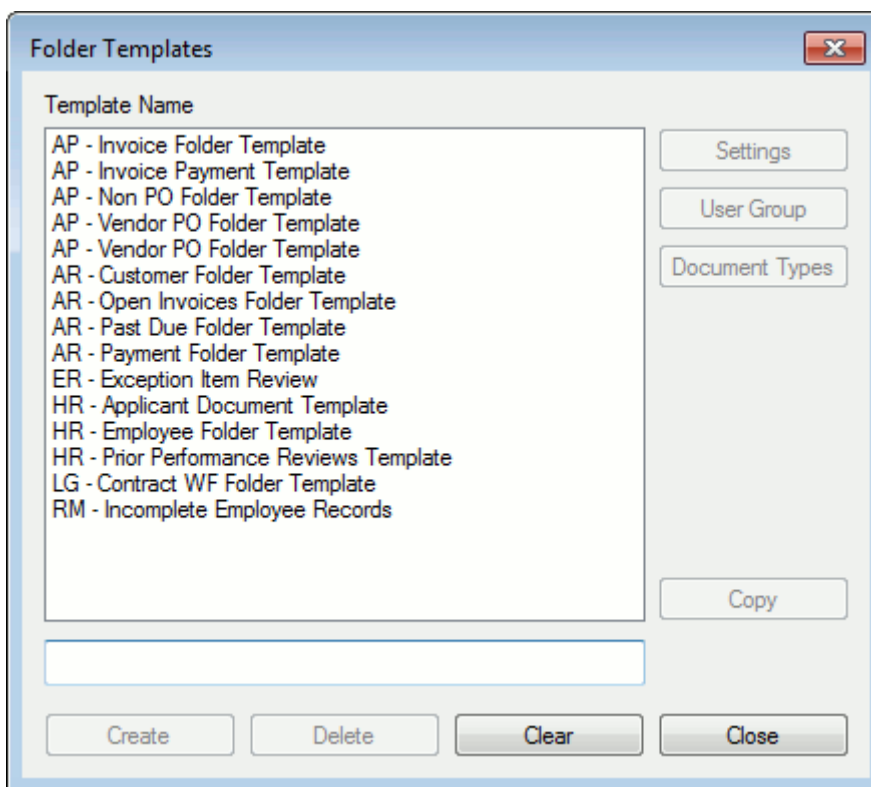
Deleting folder templates should be reserved for unused folder templates that exist in OnBase. However, to delete a folder template from OnBase, you must use the **-ROMANZO** switch.

Caution: Before using features enabled by the -ROMANZO switch, ensure that you understand the feature and implications of any changes to your system. Contact your service provider with any questions regarding these features. Features enabled by the -ROMANZO switch should not be made available to the casual user. Remove the -ROMANZO switch after completing necessary actions.

To delete a folder template:

1. Apply the **-ROMANZO** switch to the Configuration module shortcut.
2. Launch the Configuration from the shortcut with the **-ROMANZO** switch applied.
3. Navigate to **Document | Folder Templates**.

The **Folder Templates** dialog box is displayed.



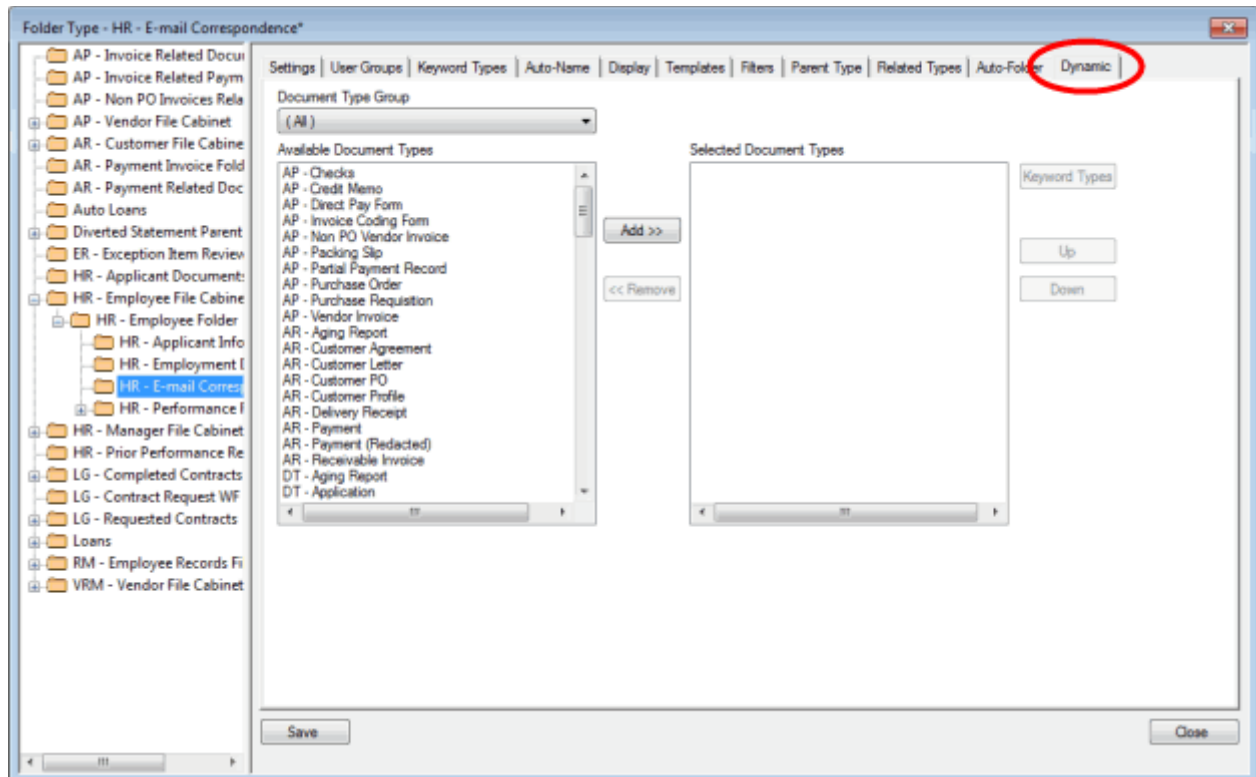
4. Select the template you would like to delete.
5. Click the **Delete** button.
6. Click **Yes** at the prompt to confirm you want to delete this folder template.

The template is removed from OnBase.

Dynamic Folder Type Configuration

Dynamic Folder Type configuration allows folders to be populated automatically with documents that meet the Document Type and Keyword value requirements.

1. If you configured the Folder Type for dynamic contents, click the **Dynamic** tab.



The **Available Document Types** list displays available Document Types or Document Type Groups. You must assign all Document Types or Document Type Groups that folders of this Folder Type should dynamically contain.

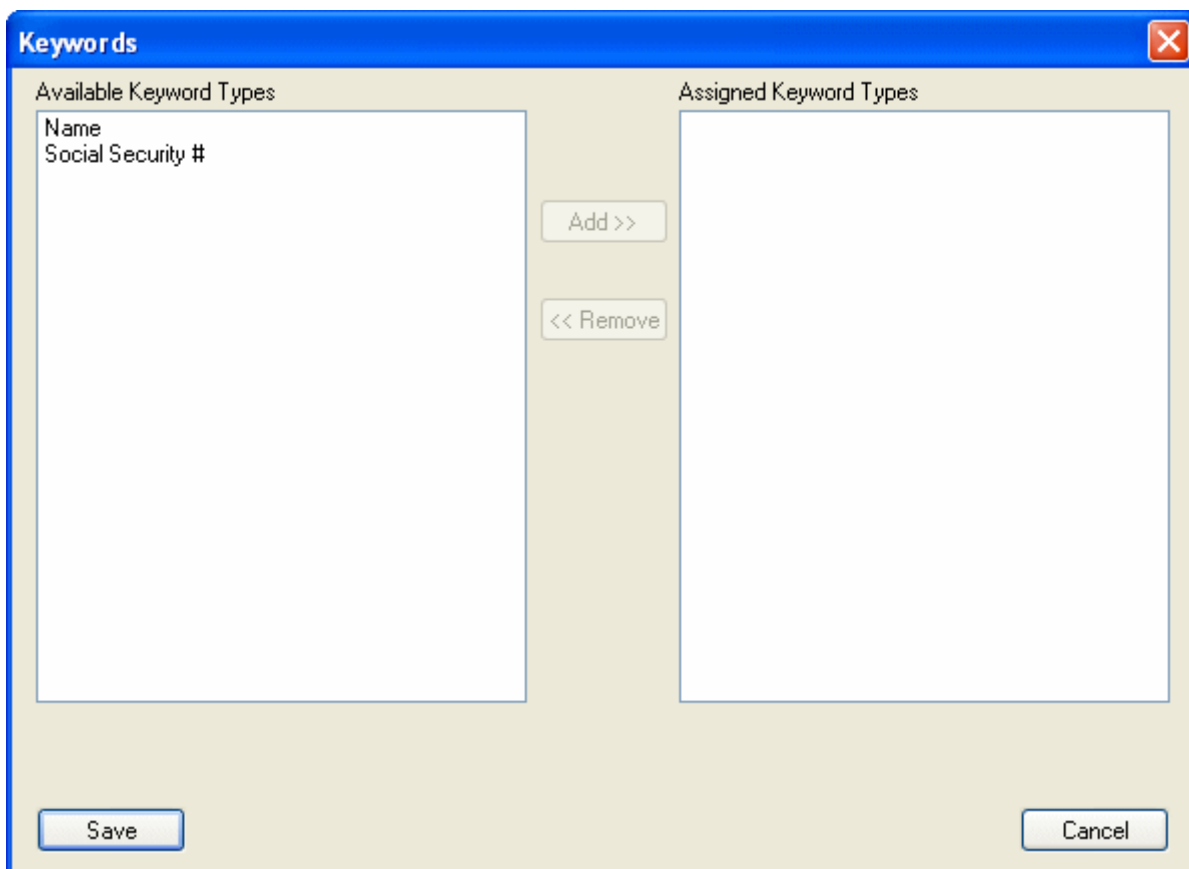
Note: Only Document Types and Document Type Groups to which you have rights are listed.

2. To filter Document Types by Document Type Group, select the Document Type Group from the **Document Type Group** filter. This filter is unavailable if the Folder Type is configured for **Dynamic Document Type Groups**.
3. Do one of the following:
 - To add a Document Type/Group, select it from the **Available Document Types** list and click **Add**.
 - To remove a Document Type/Group, select the Document Type from the **Selected Document Types** list and click **Remove**.

- To modify an existing Keyword Type assignment, select the Document Type and click **Keyword Types**.

Tip: To select multiple Document Types or Document Type Groups, press **CTRL** as you select each one.

4. When a Document Type/Group is added, OnBase automatically displays the **Keywords** dialog box.



5. Select Keyword Types to match between the documents and the folder.
 - If the Folder Type is configured for dynamic Document Types, then only Keyword Types common to both the selected Document Types and the Folder Type are available. If the necessary Keyword Types are not displayed, reassign the Keyword Types for the Folder Type or Document Type as needed.
 - If the Folder Type is configured for dynamic Document Type Groups, then all Keyword Types assigned to the Folder Type are available. If a document in an assigned Document Type Group matches a value for at least one of the folder's assigned dynamic Keyword Types, then the document is pulled into the folder.
If a document has no Keyword value in common with a folder's dynamic Keyword Types, then the document is not displayed in the folder.

Tip: Assign Keyword Types whose values won't change. Values for Keyword Types like **Name** and **Address** could change, whereas values for Keyword Types like **SSN**, **ID**, and **Policy Number** are likely to remain fixed.

6. Repeat for each Document Type needed.
7. If the Folder Type is configured to display documents ordered by a **Document Type Sequence** (on the **Display** tab), use the **Up** and **Down** buttons to change the Document Type sequence.
8. Click **Save**.

Dynamic Folders and Multi-Instance Keyword Type Groups

If the Folder Type uses a Multi-Instance Keyword Type Group, and Keyword Types in the group assigned on the **Dynamic** tab, then the selected Document Type(s) must be assigned the same Multi-Instance Keyword Type Group. This configuration is required for a dynamic folder to respect the grouping of assigned Keyword Types.

Consider the following scenario: The Keyword Types **ID** and **Color** are assigned to a dynamic Folder Type as a Multi-Instance Keyword Type Group. Both Keyword Types are used for dynamic retrieval. A folder in the OnBase Client has two instances of the Keyword Type Group using the following values:

Add / Modify Keywords

Products Folder
Products Folder - 123 - 456 - RED - BLUE

Folder Date: 06/04/2010

Keywords

- ☐ ID 123
 - ID: 123
 - Color: RED
- ☐ ID 456
 - ID: 456
 - Color: BLUE

Save Cancel

If the folder's Document Types use the same Multi-Instance Keyword Type Group as the Folder Type, then the folder can contain documents indexed with the following values:

Exact Match	First Instance Match	Second Instance Match
ID: 123 Color: Red	ID: 123 Color: Red	ID: 456 Color: Blue
ID: 456 Color: Blue		

If the Document Type is assigned the Keyword Types individually instead of as a Multi-Instance Keyword Type Group, then the folder can contain documents indexed with any combination of values, as long as the values match the folder's.

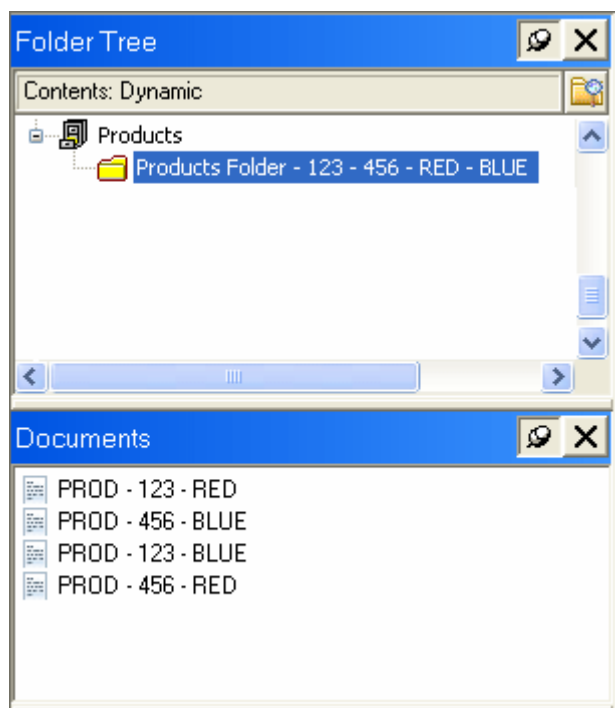
Possible Keyword values for contents that don't use the folder's MITKG:				
ID: 123 ID: 456 Color: Red Color: Blue	ID: 123 Color: Red	ID: 123 Color: Blue	ID: 456 Color: Red	ID: 456 Color: Blue

The same rule applies when the Document Type is assigned the Keyword Types in a different Multi-Instance Keyword Type Group than the Folder Type's.

Show Folder Locations

When the Folder Type and Document Type do not use the same Multi-Instance Keyword Type Group, the **Show Folder Locations** command may not behave as expected. In the OnBase Client, **Show Folder Locations** is executed from a document to retrieve folders where the document resides. If a folder is indexed with multiple instances of a Keyword Type Group, the **Show Folder Locations** command will retrieve the folder only for documents indexed with values that are in the same instance of a Keyword Type Group on the folder.

Consider the following example:



Here, the folder has the following values within Keyword Type Groups:

- **ID**=123
Color=Red
- **ID**=456
Color=Blue

Documents in the folder are assigned **ID** and **Color** as individual Keyword Types. Even though the folder contains a document with the values **ID**=123 and **Color**=Blue, executing the **Show Folder Locations** command from this document will not retrieve the folder. The document's Keyword values must be in the same instance of the Keyword Type Group on the folder.

Folder Notes

Folder notes allow users to efficiently navigate folders and find specific information about their contents. Like physical notes on paper folders, folder notes in OnBase can provide additional information about a folder's contents, or they can act as bookmarks to help users quickly find a document. By providing users the information they need at a glance, folder notes can save users time spent searching through every document in a folder.

- In the OnBase Client, folder notes are displayed in the **Folder Notes** pane of the advanced File Cabinets window.
- In the Unity Client, they are displayed in the **Notes and Bookmarks** pane.

In each client, the pane displays all notes residing on any folder within the current parent folder for notes. If a note is configured as a bookmark, then users can click the note to quickly jump to a specific page of a bookmarked document residing in another folder.

Folder Note Types are configured in OnBase Configuration by an administrator or in the OnBase Client module by users who have the **Folder Note Types** Product Right. This Product Right allows users to create Folder Note Types and assign Folder Note Type privileges to the appropriate users. By empowering users to create Folder Note Types in the OnBase Client, you do not have to configure them yourself or give another User Group access to the Configuration module.

Note: Folder notes can be both viewed and created in the Unity Client and Web Client, but the Folder Note Types on which the notes are based cannot be configured there. For more differences between client applications, see [Folder Feature Support on page 175](#).

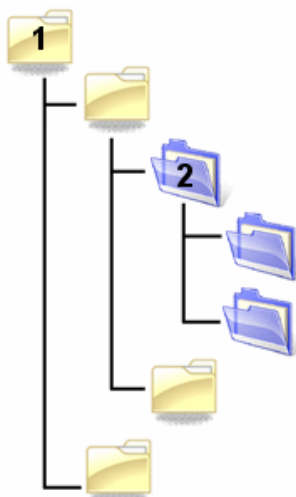
Configuring Folder Types for Folder Notes

To allow notes, a folder must satisfy either of the following requirements:

- The folder is based on a Folder Type configured as a parent folder for folder notes. These parent folders define the branch of the folder tree where folder notes are allowed.
- The folder resides within a parent folder for folder notes. When you designate a folder as a parent folder for notes, all folders branching from that parent folder will allow notes.

Users can add notes to folders satisfying either of these requirements. If a note exists in any folder within the parent folder (including the parent folder itself), then the note is displayed in the **Folder Notes** pane from any folder in that branch of the folder tree.

The exception to this behavior is when a parent for folder notes contains another folder that is also configured as a parent for folder notes. In this case, the parent folder that is higher in the hierarchy will contain folder notes residing on it and all of its child folders, but it will not contain notes residing on the lower-level parent folder or any of that folder's child folders. The following diagram illustrates this concept:

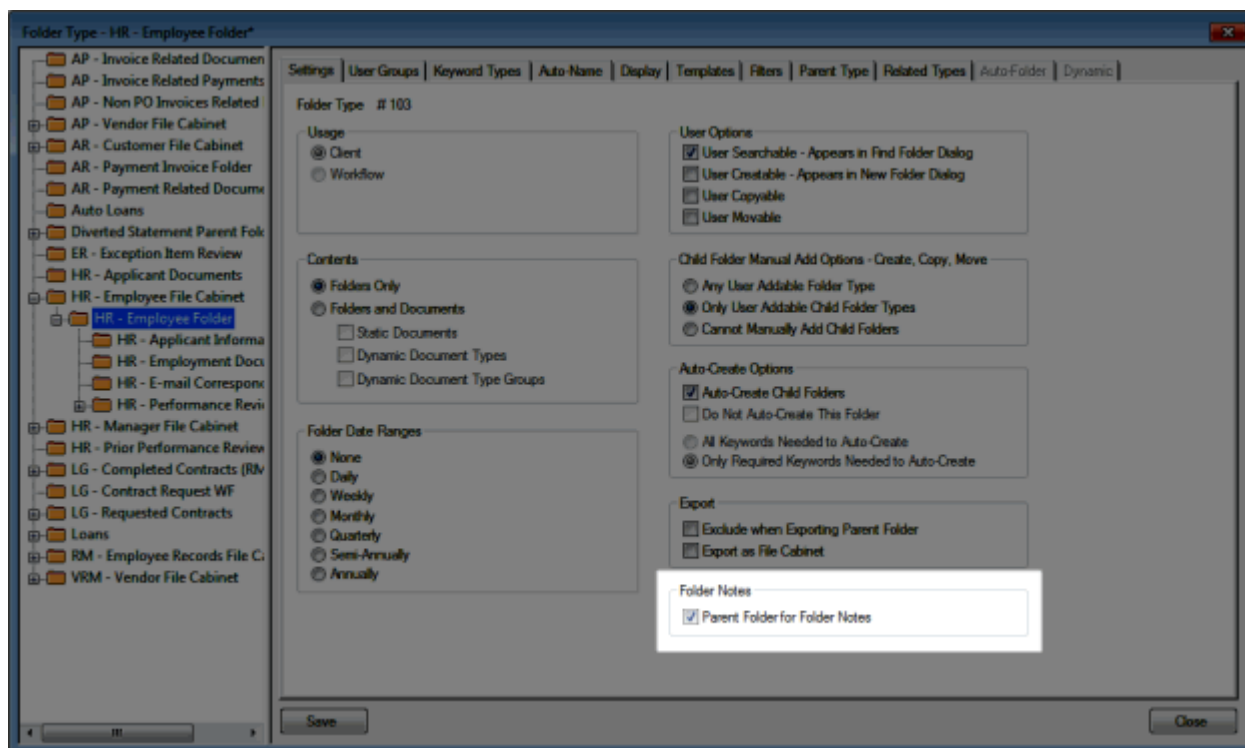


In this illustration, the Folder Types for folders 1 and 2 are configured as parents for folder notes. The **Folder Notes** pane for the yellow folders displays all notes residing on only the yellow folders. The **Folder Notes** pane for the blue folders displays all notes residing on only the blue folders. When you configure a folder as a parent folder for notes, that folder acts as an isolated container for folder notes within that branch of the folder tree. This configuration allows a branch to contain multiple sets of folder notes.

Procedure

1. To configure a Folder Type for folder notes, select **Document | Folder Types** in OnBase Configuration.
2. Select the Folders Type to designate as a parent Folder Type for folder notes.

- From the **Settings** tab, select the **Parent Folder for Folder Notes** option.



Tip: If folders containing notes must be movable, make the parent folder for folder notes movable. This configuration allows all notes to be moved with the parent. If you configure a child folder to be movable, then any bookmarks pointing to the child folder may be broken when the child folder is moved.

- Click **Save**. Once Folder Note Types are configured in OnBase Configuration or the OnBase Client, then notes can be placed on folders and child folders of the selected Folder Type.

Assigning Users Rights to Configure Folder Note Types

Folder Note Types can be configured in either the OnBase Client or OnBase Configuration. The creator of a Folder Note Type also grants other users privileges to view, create, edit, and delete notes based on that Folder Note Type. The creator can also grant other users the right to configure the Folder Note Type.

- To configure Folder Note Types in OnBase Configuration, users must have the **Document Configuration** right and the **Configuration** Product Right. See [Creating Folder Note Types in OnBase Configuration on page 109](#).
- To configure Folder Note Types in the OnBase Client, users must have the **Folder Note Types** Product Right. To assign this right to a User Group, see [Assigning Product Rights for Folder Notes on page 171](#). To create Folder Note Types in the Client, see [Creating Folder Note Types on page 258](#).

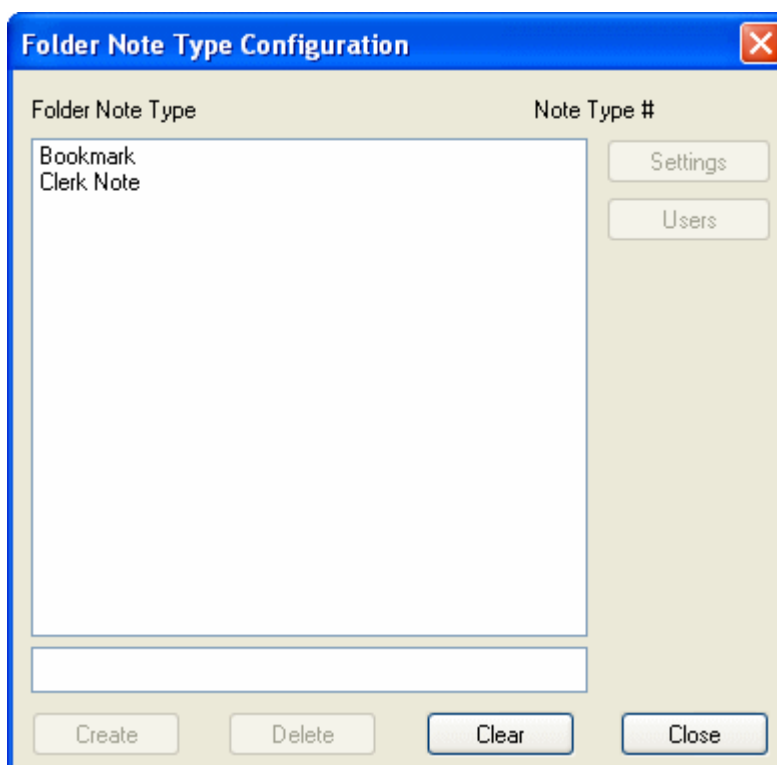
- To configure Folder Note Types created by other users, users must also be granted the **Configure** privilege on those Folder Note Types. Users do not require this privilege to configure Folder Note Types that they have created.

Creating Folder Note Types in OnBase Configuration

Folder Note Types can be configured in either the OnBase Client or OnBase Configuration. Use the following steps to configure Folder Note Types in OnBase Configuration. For the OnBase Client procedure, see [Creating Folder Note Types on page 258](#).

1. In OnBase Configuration, select **Document | Folder Note Types**.

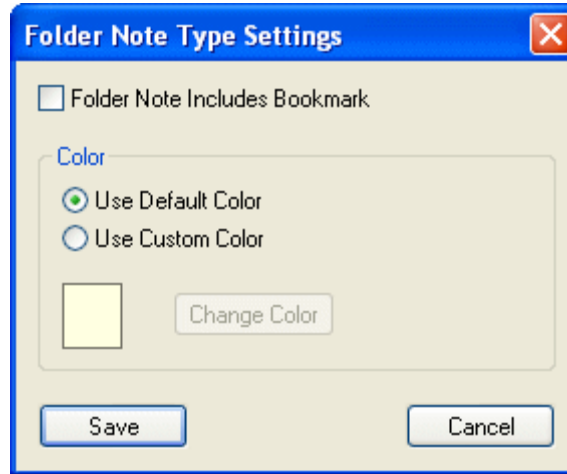
The **Folder Note Type Configuration** dialog box displays a list of all Folder Note Types that you either created or have rights to configure.



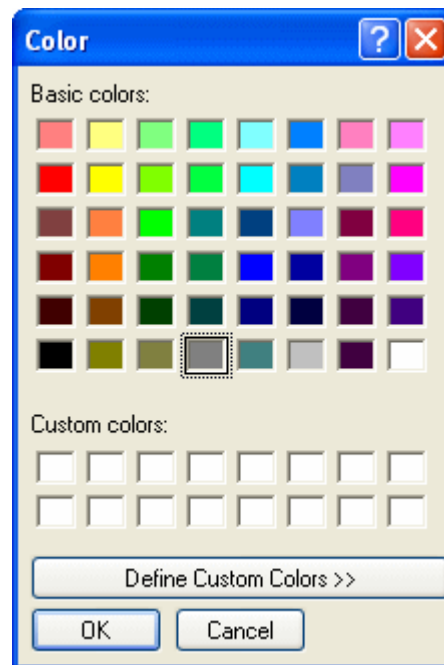
2. Type a unique name for the Folder Note Type in the field provided.
Use a naming convention that indicates whether the Folder Note Type is a bookmark.
3. Click **Create**.

Note: Folder Note Types must have unique names. If you receive an error indicating the name is already in use, but it is not displayed in the list, then another note administrator may have configured a Folder Note Type with that name without granting you access to it.

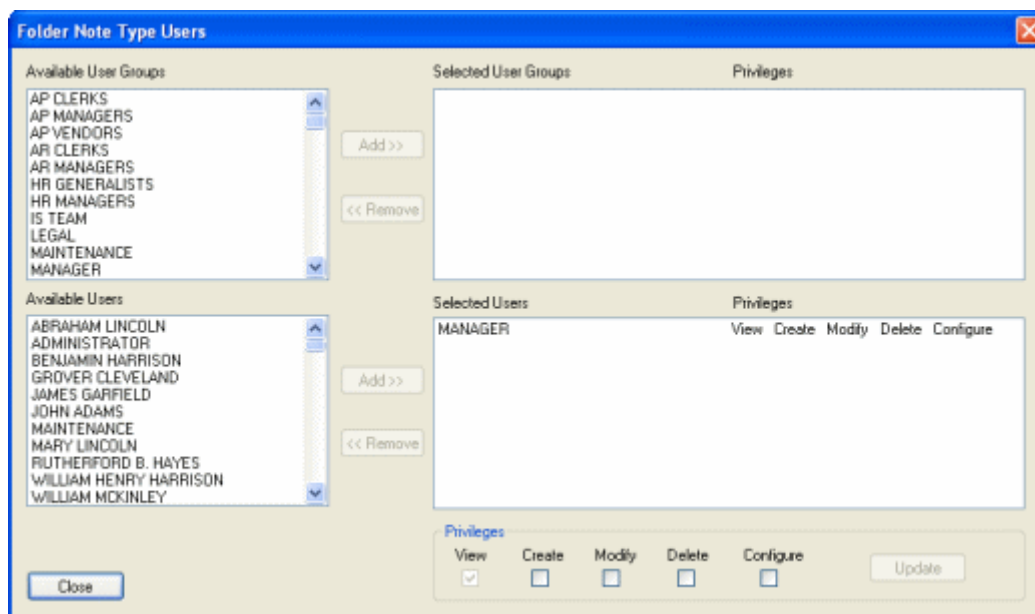
4. Ensure the Folder Note Type is selected and click **Settings**. The **Folder Note Type Settings** dialog box is displayed.



5. To make the Folder Note Type a bookmark, select **Folder Note Includes Bookmark**. Bookmarks include a **Go to page** button that users can click to display the bookmarked page.
6. To change the note color, select **Use Custom Color**. Different colors can help users understand the note's importance, function, or relationship to other notes.
 - a. Click **Change Color**. The **Color** dialog box is displayed.



- b. Select a color.
 - Either select a basic color or click **Define Custom Colors** to select another color.
 - If you define a custom color and click **Add to Custom Colors**, the color is added to the **Custom colors** palette, where you can apply it to other Folder Note Types.
 - Colors in the **Custom colors** palette remain available for the current session only. When you exit OnBase, the **Custom color** palette is cleared.
 - Choose a lighter color to contrast with the black note text. Black cannot be chosen because it would render notes unreadable.
- c. Click **OK**.
7. Click **Save**.
8. From the **Folder Note Type Configuration** dialog box, click **Users**. The **Folder Note Type Users** dialog box is displayed.



9. From the panes on the left, select the User Group or users who require privileges to this Folder Note Type. If multiple groups and users should have the same privileges, press **CTRL** as you click to make multiple selections.
10. Under **Privileges**, select the privileges to grant to the selected groups or users. The following privileges are available:

Privilege	Description
View	Users can see notes based on this Folder Note Type in the Folder Notes pane of the File Cabinets window. Because users must be able to see folder notes in order to work with them, this option is automatically applied to any users given Folder Note Type privileges.
Create	Users can create notes based on this Folder Note Type.

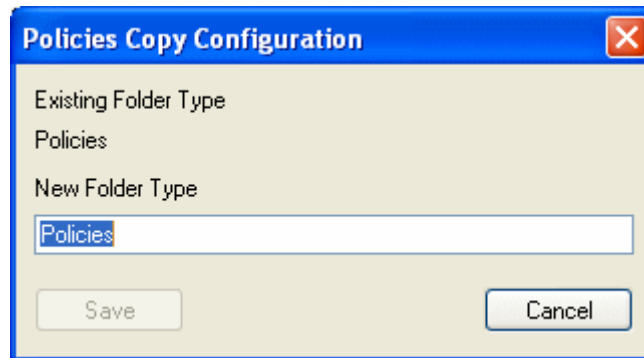
Privilege	Description
Modify	Users can edit the text in notes based on this Folder Note Type.
Delete	Users can delete notes based on this Folder Note Type.
Configure	<p>Users can view and edit the configuration of this Folder Note Type, provided that they also have sufficient privileges to configure Folder Note Types.</p> <hr/> <p>Note: The creator of a Folder Note Type can view and edit the Folder Note Type's configuration regardless of this privilege.</p> <hr/>

11. Click **Add**. The selected groups or users and their privileges are displayed in the panes on the right.
12. To modify a group or user's privileges:
 - a. Select the group or user from a pane on the right.
 - b. Select or clear privileges as needed.
 - c. Click **Update**.
13. Click **Close**.
14. Repeat steps 2–13 for each Folder Note Type needed.

Copying Folder Type Configurations

You can create new Folder Types by copying existing Folder Types. Use this method to quickly create new Folder Types without configuring each option. The copied Folder Type will have the same configuration settings as the original. No child Folder Types are copied.

1. Select the Folder Type you want to copy from the folder tree.
2. Right-click and select **Copy**. The **Copy Configuration** dialog box is displayed.



3. Type a name for the new Folder Type.
4. Click **Save**.

Deleting Folder Types and Folders

You can delete Folder Types and existing folders in OnBase through Folder Type configuration.

To remove a Folder Type and all of its configuration information, see the following procedure.

To delete folders based on the selected Folder Type, see [Deleting Existing and Orphaned Folders in the Client on page 114](#).

Deleting Folder Types from Configuration

You can delete Folder Types that meet the following criteria:

- The Folder Type currently has no folders based on it in the Client.
- There are no folders of that Folder Type in Folder Maintenance.
- The Folder Type currently has no file cabinets based on it.
- The Folder Type's child Folder Types currently have no folders based on them in the Client.
- You must have rights to all child Folder Types; otherwise, you cannot delete the parent Folder Type.

To delete a Folder Type:

1. In OnBase Configuration, select **Document | Folder Types**.
2. Select the Folder Type from the **Folder Tree** pane.

3. Right-click and select **Delete**.

The **Confirm** dialog box asks whether you want to delete the selected Folder Type and all of its child Folder Types.

4. Click **Yes** to confirm deletion, or click **No** to cancel the deletion and retain the Folder Type.

Caution: If you delete a parent Folder Type, all of its child Folder Types are also deleted.

Note: If any existing folders or file cabinets are based on the Folder Type, a message states the Folder Type cannot be deleted because a folder of that Folder Type exists in OnBase. To delete the existing folders, see the following procedure. To delete file cabinets, see [Deleting a File Cabinet on page 20](#).

Deleting Existing and Orphaned Folders in the Client

Folder Type configuration provides two options for deleting existing folders from OnBase:

- **Delete Orphans:** Use this option to delete all empty folders based on a selected Folder Type and its child Folder Types. Empty folders, or orphans, contain no documents. This option will not delete folders if they or any of their child folders contain documents.
Use **Delete Orphans** to delete all folders and child folders created when improperly indexed documents were auto-foldered.
- **Delete Folders:** Use this option to delete all existing folders based on a selected Folder Type and its child Folder Types, regardless of whether they contain documents. If the folders contain documents, the documents remain available within OnBase; only the folders are deleted.
Use **Delete Folders** to delete all folders of a Folder Type you no longer need. Then, delete the Folder Type itself.

Before using either of these options, be aware of the following limitations and requirements:

- Neither option is available for Workflow or file cabinet Folder Types.
- Folders are not deleted if they are locked by a user, for example, because a user has a folder open in the OnBase Client.

To delete existing folders based on a Folder Type:

1. In OnBase Configuration, select **Document | Folder Types**.
2. Select the Folder Type from the folder tree.

3. Right-click and select one of the following options:
 - **Delete Orphans:** Select to delete empty folders based on the selected Folder Type and its child Folder Types. Folders are not deleted if they or any of their child folders contain documents.
 - **Delete Folders:** Select to delete all folders based on the selected Folder Type and its child Folder Types. If any folder contains documents, the documents remain available in OnBase; only the folder is deleted.

You are prompted to specify what OnBase should do with the deleted folders.



4. Select **Folder Maintenance** to send the deleted folders to Folder Maintenance for final review before purging.
Select **Purge Immediately** to purge the folders from OnBase immediately without sending them to Folder Maintenance.

Caution: If you select **Purge Immediately**, folders and their child folders are removed permanently and cannot be retrieved from OnBase. Sending the folders to Folder Maintenance is recommended because it allows you to review all deleted folders and undelete those that were deleted unintentionally.

5. Click **OK**. Depending on the option selected, the folders and child folders are either purged or sent to Folder Maintenance. A message displays the operation's outcome.
6. Click **Show Details** from the message dialog box to see which folders were deleted and why any folders could not be deleted.

Auto-Foldering

Auto-foldering allows you to automatically create folder structures in OnBase when documents are imported. OnBase uses document Keyword values to determine whether a folder already exists for the document. If there are no matching folders, OnBase creates a folder and its parent folders automatically.

Before Beginning Auto-Foldering Configuration

Before configuring auto-foldering, ensure you understand the Keyword relationships between documents and folders. Perform the following tasks.

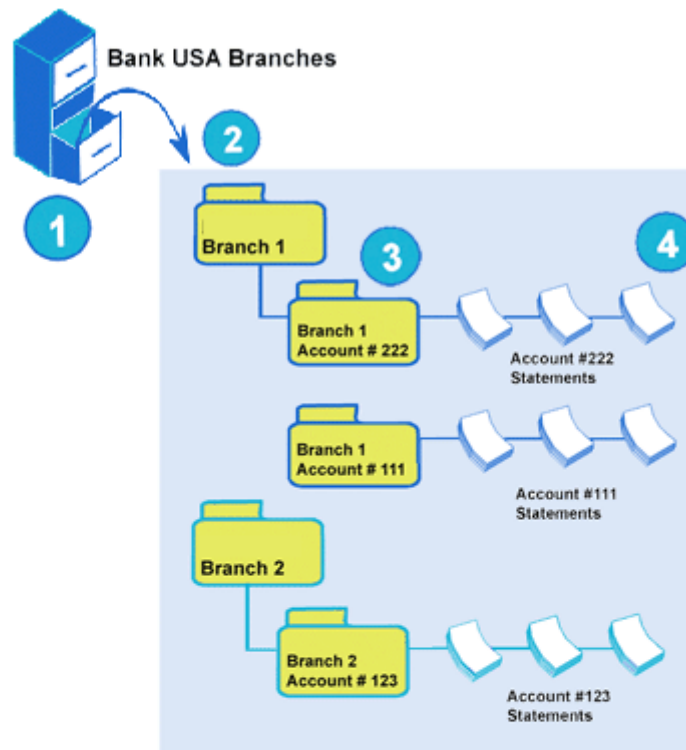
1. [Draw an Outline of the Intended Results.](#)
2. [Identify Keyword Types for Organizing Folders and Documents.](#)

Draw an Outline of the Intended Results

Draw an outline of the intended results before configuring auto-foldering. Map out the folder structure, including the folders, the documents they'll contain, and how the documents will be organized (i.e., the Keyword Types that will be used).

Refer to this outline during auto-foldering configuration to see the relationships between auto-foldering components. The [Example of Intended Results Outline on page 117](#) illustrates a sample outline.

Example of Intended Results Outline



- 1 **File Cabinet** - Contains a folder for each Branch of the Bank USA Bank.
- 2 **Bank Branch Folder** - First level of folders in the Bank USA File Cabinet. Contains all account folders for the Branch. Each Bank Account in the Branch has its own folder inside the Bank Branch Folder.
- 3 **Bank Account # Folder** - Second level of the Bank USA File Cabinet. Displays the Branch Name and the Account # Keyword Types. Each Account # folder contains all of the Statements for that Account.
- 4 **Bank Account Statements**. Displays the Document Type name and the Account #.

Identify Keyword Types for Organizing Folders and Documents

Auto-folding requires common Keyword Types to be established between the following components:

- A Folder Type and its parent Folder Type.
Common Keyword Types between a Folder Type and its parent determine where a folder is created within a folder structure. Common Keyword Types are assigned on the **Parent Type** tab when you configure a Folder Type for auto-folding.

- A Document Type and the Folder Type configured for auto-folding.
Common Keyword Types between a Document Type and a Folder Type are used to determine the Folder Type where documents are auto-folded. These Keyword Types are assigned either using the **Auto-Folder** tab for the Folder Type or using the **Auto-Folder Configuration** dialog box for the Document Type.

Note: Only the Keyword Types required to establish these relationships should be assigned as auto-folder Keyword Types.

Tip: Assign Keyword Types whose values won't change. Values for Keyword Types like **Name** and **Address** could change, whereas values for Keyword Types like **SSN**, **ID**, and **Policy Number** are likely to remain fixed.

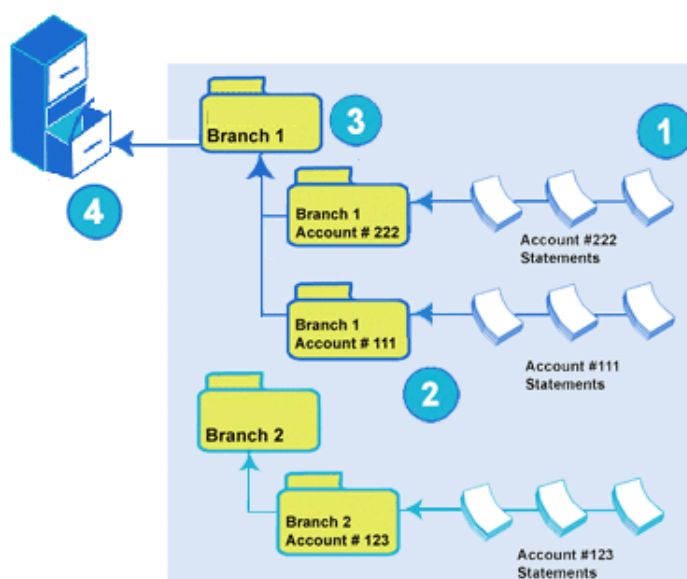
For auto-folding to work, imported documents must have values for the Keyword Types that define these relationships. If an imported document is missing a value for a Keyword Type used for auto-folding, the document is not auto-folded. If an imported document has multiple values for one Keyword Type, a new folder is created for each Keyword value, and the document is placed in each folder. See [Multiple Instances of Keyword Types and Auto-Folding on page 54](#) for additional information.

In the [Example of Intended Results Outline](#), the file cabinet contains a parent Folder Type of **Branch** and a child Folder Type of **Account**. In this example, the Document Type that resides in the Account folder must be assigned the Keyword Types of both **Branch** and **Account**. This ensures that the account statement resides in the Account folder for the correct branch. (For example, the statement for John Doe, Account #111 of Branch 1 should reside in the Account #111 folder of Branch 1 and not the Account #111 folder of Branch 2.)

See [How OnBase Uses Keyword Values When Auto-Folding on page 119](#) for more information about these concepts.

Note: Avoid assigning Keyword Types based on names; a name can change (by marriage, for example) or be misspelled, which would result in an incorrect auto-folding structure. A better choice is to auto-folder using the Account # Keyword Type—a static, unique number.

How OnBase Uses Keyword Values When Auto-Foldering



- 1 **Bank Account Statement Document Type.**
 - **Account # Keyword Type** value, and the **Bank Branch Keyword Types** are assigned to the Document Type and used in the Auto-Name.
 - The **Bank Account Statement Document Type** is assigned to the **Account # Folder Type** in Document Type Auto-Folder Configuration using **Account # Keyword Type** value, and the **Bank Branch Keyword Type** value. (so it not only goes into an Account # Folder with the correct value, but also to the right Branch.)
 - Other Keywords may be assigned to the Document Type, but they aren't used in Auto-Foldering.
- 2 **Bank Account # Folder Type**
 - Parent Type is **Bank Branch Folder Type**
 - Common Parent Keyword is **Bank Branch Keyword Type**
 - **Bank Account Statement Document Type** is assigned to be Auto-Foldered into this Folder Type using the **Account # Keyword Type** value, and the **Bank Branch Keyword Type** value.
 - Other Keywords may be assigned to the Folder Type, but they aren't used in Auto-Foldering.
 - **Account # Keyword Type** value, and the **Bank Branch Keyword Types** are used in the Auto-Name.
- 3 **Bank Branch Folder Type -**
 - **Branch Name Keyword Type** assigned to Folder Type and used in the Auto-Name
 - Parent Folder Type is Bank USA Folder Type
 - Other Keywords may be assigned to the Folder Type, but they aren't used in Auto-Foldering.
- 4 **Bank USA File Cabinet**
 - No Keywords assigned.
 - No Parent Type assigned.

How Documents are Auto-Foldered

There are several ways to initiate auto-folding, depending on whether the documents to be auto-folded already reside in OnBase:

- For new documents, auto-folding is triggered upon importing documents into OnBase. Auto-folding is available upon import from processing modules (e.g., COLD, DIP or TIP), from an HL7 message, or from the manual importing of documents into OnBase.
- For existing documents, auto-folding can be triggered in OnBase Configuration using the **Auto-Folder Existing Documents** feature in Document Type configuration.
- For existing documents, auto-folding can be triggered in the OnBase Client by re-indexing, modifying Keyword values, or executing AutoFill Keyword Set import processes that are configured to auto-folder updated documents.

Note: E-Forms created from the Classic Workflow interface in the OnBase Client will not trigger auto-folding unless the **Auto-Folder Document** Workflow action is used. The E-Form Document Type must also be properly configured for auto-folding.

Configuring a Folder Structure for Auto-Foldering

Auto-foldering can automatically create a folder structure, or file system, when documents are imported or re-indexed into Document Types configured for auto-foldering.

- Auto-foldering must be configured for each Document Type using either the Document Type's **Auto-Folder Configuration** dialog box or the **Auto-Folder** tab in Folder Type configuration.
- Keyword Types must establish the relationship between documents and folders and designate the inclusion or exclusion of documents in the folders.

Keyword Types That Affect Auto-Foldering

Not all Keyword Types assigned to a Document Type or a Folder Type will affect auto-foldering. Only common Keyword Types between a Folder Type and its parent Folder Type and common Keyword Types between a Folder Type and a Document Type will affect the auto-foldering scheme. For more information about Keyword Types required for auto-foldering, see page 117.

Keyword Types That Do Not Affect Auto-Foldering

A Document Type may be assigned several Keyword Types that do not affect the auto-foldering structure. If these Keyword Types are also assigned to Folder Types in the auto-foldering structure, new Keyword values can be added to or replaced on these Folder Types when an auto-foldering process adds or updates documents within the folder structure. For information about Keyword Update options, see [Configuring Document Type Auto-Foldering on page 127](#).

Overview of Auto-Foldering Configuration

Ensure you understand how basic folders work before configuring auto-foldering.

Tip: As an exercise for understanding auto-foldering, set up an auto-foldering scheme containing both dynamic and static folders at different levels in the hierarchy. A static folder created through auto-foldering will automatically contain only the document that triggered the auto-foldering process. Any additional contents must be added manually. A dynamic folder will be automatically populated with all documents that satisfy the folder's dynamic requirements.

1. Before beginning auto-foldering configuration, outline the intended results. See [Example of Intended Results Outline on page 117](#) for additional information.
2. Configure a Folder Type for the file cabinet. See page 16.
3. Configure the following for all Folder Types that belong in this file cabinet.
 - Settings Tab
 - User Groups Tab
 - Keyword Types Tab

- Auto-Name Tab
- Display Tab

File cabinets can contain folders of multiple Folder Types. (For example, both static Folder Types and dynamic Folder Types can reside in the same file cabinet. See page 21.)

Tip: Refer to your outline for guidance on assigning Keyword Types.

4. Configure the parent Folder Types for all Folder Types that will be in the hierarchy. Parent Folder Types create the relationship between a folder and a child folder. See [Parent Folder Type Configuration on page 123](#).
5. If the Folder Type is **Static** only, proceed to the next step. When auto-folding with a static Folder Type, only the document that triggers the auto-folding process will be added to the folder automatically. The rest of the folder's contents must be added manually.
If the Folder Type is dynamic (**Dynamic Document Types**, **Dynamic Document Type Groups** or a combination of **Static** and **Dynamic**), you must configure additional dynamic parameters. For comprehensive Folder Type configuration steps, see page 21.
6. Create the file cabinet. See [File Cabinet Configuration on page 12](#).

Note: You must create a separate Folder Type for each file cabinet that uses auto-folding. You cannot share a Folder Type between two file cabinets when auto-folding.

7. Configure auto-folding for all Document Types that will be automatically placed in this hierarchy of Folders upon import into OnBase. See [Configuring Document Type Auto-Folding on page 127](#).

Parent Folder Type Configuration

The ability to automatically create a folder structure through auto-folding is directly related to the parent-child Folder Type relationship that begins with the file cabinet.

Each Folder Type in the auto-folding structure, with the exception of the file cabinet's Folder Type, will have a parent Folder Type. The parent Folder Type is the Folder Type within which a child Folder Type resides. In the following example, note the parent-child relationships:

- The parent of the **Form Type** Folder Type is the **File Cabinet - General Hospital** Folder Type (Folder Type of the file cabinet).
- There are three child Folder Types of the **Form Type** Folder Type - **Admit Forms Folder**, **EOB Folder**, and **Patient Information Folder**.
- The parent to **Admit Forms Folder**, **EOB Folder**, and **Patient Information Folder** Folder Types is **Form Type**.
- **Admit Forms Folder**, **EOB Folder**, and **Patient Information Folder** Folder Types do not have any child Folder Types.

When configuring auto-folding applications, you will assign parent Folder Types to all Folder Types inside the file cabinet hierarchy.

Note: Do not assign a parent Folder Type to the file cabinet Folder Type.

1. In OnBase Configuration, select **Document | Folder Types**.

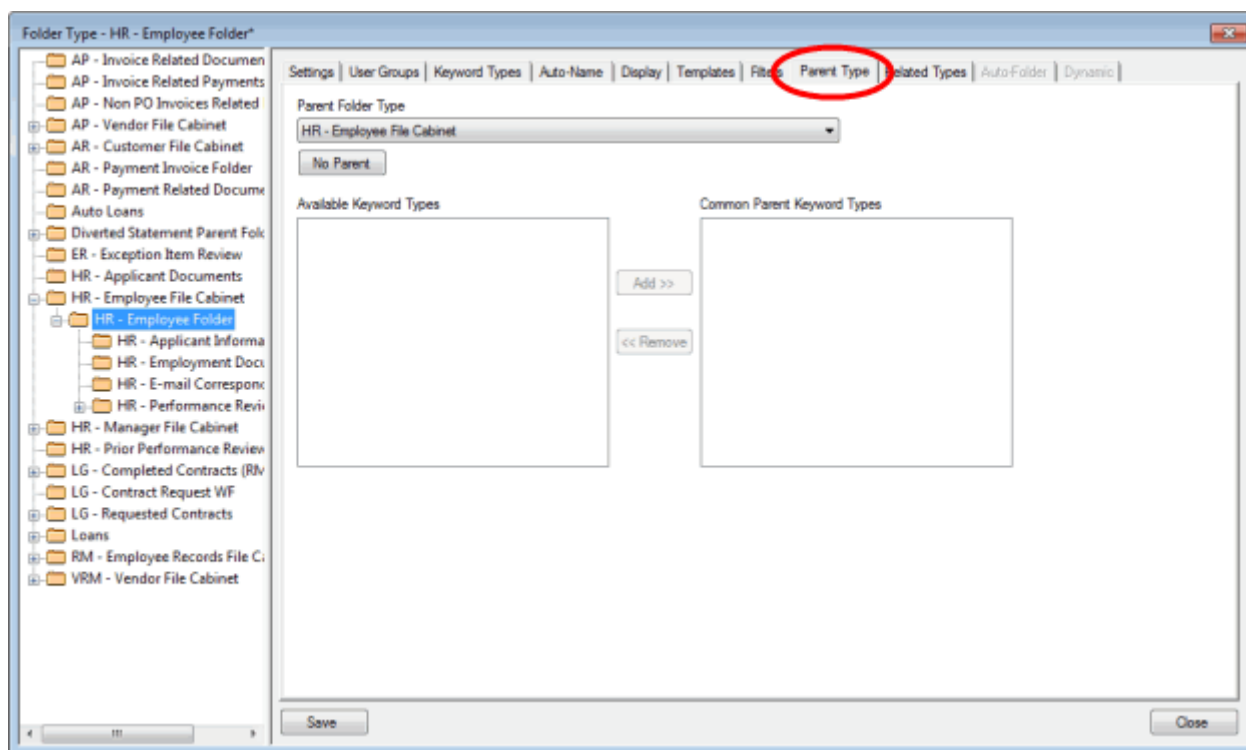
The screenshot displays the 'Folder Types' configuration window in OnBase. The left sidebar shows a hierarchy of folder types, with 'HR - Employee Folder' selected. The main area is divided into several sections:

- Settings:** Includes tabs for User Groups, Keyword Types, Auto-Name, Display, Templates, Filters, Parent Type, Related Types, Auto-Folder, and Dynamic.
- Folder Type # 103:** The selected folder type.
- Usage:** Radio buttons for 'Client' (selected) and 'Workflow'. A checkbox for 'Exclude Primary Document' is also present.
- Contents:** Radio buttons for 'None (Folders Only)' (selected), 'Static Documents', 'Static and Dynamic Documents', 'Dynamic Document Types', and 'Dynamic Document Type Groups'.
- Folder Date Ranges:** Radio buttons for 'None' (selected), 'Daily', 'Weekly', 'Monthly', 'Quarterly', 'Semi-Annually', and 'Annually'.
- User Options:** Checkboxes for 'User Searchable - Appears in Find Folder Dialog' (checked), 'User Creatable - Appears in New Folder Dialog', 'User Copyable', and 'User Movable'.
- Child Folder Manual Add Options - Create, Copy, Move:** Radio buttons for 'Any User Addable Folder Type', 'Only User Addable Child Folder Types' (selected), and 'Cannot Manually Add Child Folders'.
- Auto-Create Options:** Checkboxes for 'Auto-Create Child Folders' and 'Do Not Auto-Create This Folder'. Radio buttons for 'All Keywords Needed to Auto-Create' and 'Only Required Keywords Needed to Auto-Create' (selected).
- Export:** Checkboxes for 'Exclude when Exporting Parent Folder' and 'Export as File Cabinet'.
- Folder Notes:** A checkbox for 'Parent Folder for Folder Notes'.
- Save:** A button at the bottom left.

2. If the Folder Type already exists, select the Folder Type for the Folder that will be first in the hierarchy (just below the file cabinet). Click the **Parent Type** tab.

If this is a new Folder Type, you can select its file cabinet Folder Type from the folder tree, right-click and select **New Child**. This automatically assigns the parent-child relationship. Click the **Parent Type** tab to see the settings.

Note: If you have created a file cabinet based upon a Folder Type, the Folder Type's **Parent Type** tab is unavailable and you cannot assign it a parent Folder Type. If you delete the file cabinet, the **Parent Type** tab is available and you can assign a parent Folder Type.



3. Select the file cabinet Folder Type from the **Parent Folder Type** drop-down list. (Click **No Parent** to undo any accidental parent Folder Type selections.) Do not add any common parent Keyword Types. If you followed best practices for configuring file cabinets, no Keyword Types should be available because no Keyword Types should be assigned to the file cabinet.

The Folder Type will reside within its parent in the folder tree.

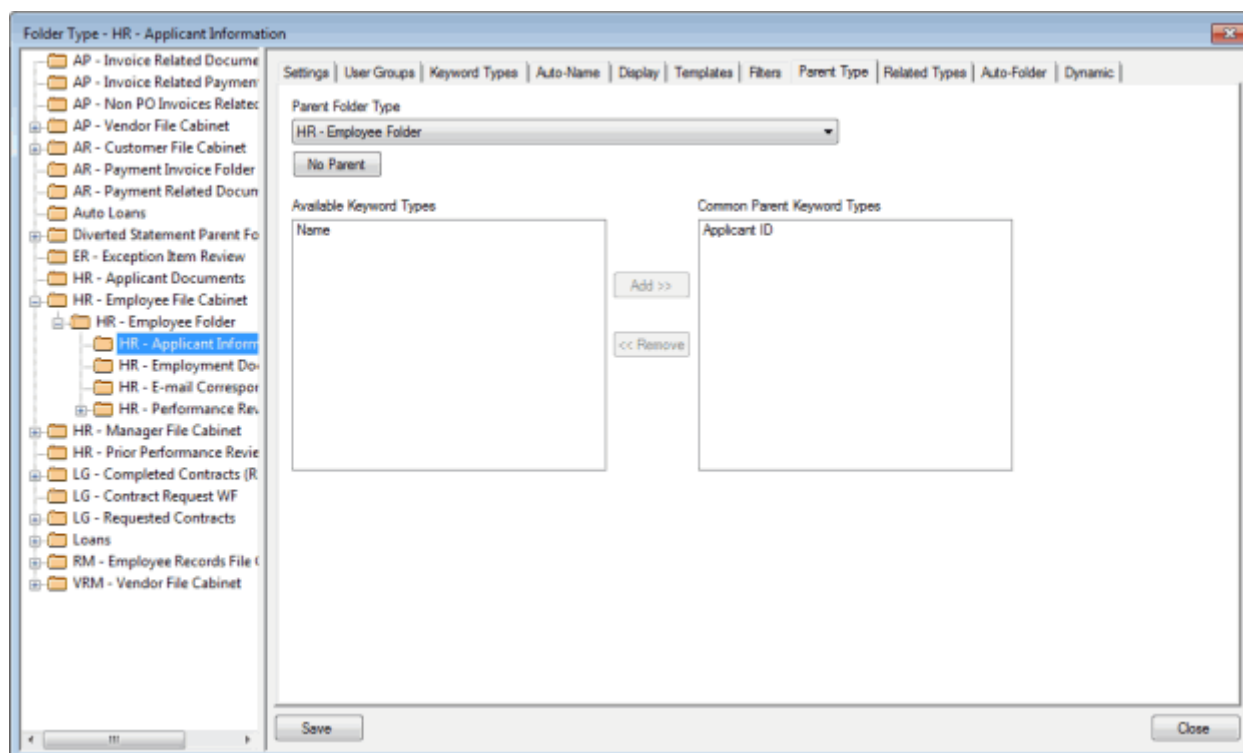
4. Click **Save**.
5. Select the Folder Type that will be next in the hierarchy and select the appropriate Folder Type from the **Parent Folder Type** drop-down list.

Tip: If you are creating a new Folder Type, you can select the desired parent, right-click and select **New Child** to automatically assign the parent-child relationship.

6. Select the Keyword Types required for the auto-folder operation to associate this Folder Type to its parent Folder Type. To add common Keyword Types between the two Folder Types, select the Keyword Type(s) in the **Available Keyword Types** list and click **Add**. The Keyword Type(s) will be moved into the **Common Parent Keyword Types** list. (To remove common Keyword Types, select them from the list and click **Remove**.)

See the [Example of Intended Results Outline on page 117](#) for an illustration of Keyword Types used to associate Folder Types in an auto-folding scheme.

Note: Only Keyword Types which have been assigned to both the parent and child Folder Types (i.e., common Keyword Types) are available for selection in the **Available Keyword Types** list. If Keyword Types are not available, verify they have been assigned on the **Keyword Types** tab for both Folder Types.



Note: When Keyword Types used for auto-folding have multiple values, OnBase automatically creates a folder for each Keyword value and places the document in each folder. Ensure that your Keyword Type design is appropriate to obtain desired auto-folding results. See [Multiple Instances of Keyword Types and Auto-Folding on page 54](#) for additional information.

Note: A document is not auto-folded if it is missing one or more keywords that are used for auto-folding. An error message is displayed unless the document is encountered as part of an automated process.

7. Repeat for all remaining Folder Types that require a parent Folder Type.
8. When all parent Folder Types have been assigned, click **Save**.

Configuring Document Type Auto-Foldering

In order for documents to auto-folder upon import to OnBase, their Document Type must be configured for auto-foldering. Ensure Document Types are available before beginning this procedure. See the Configuration Help for Document Type Configuration.

Assign the Document Type to the Folder Type for auto-foldering in one of two places:

- Folder Type configuration
- Document Type configuration

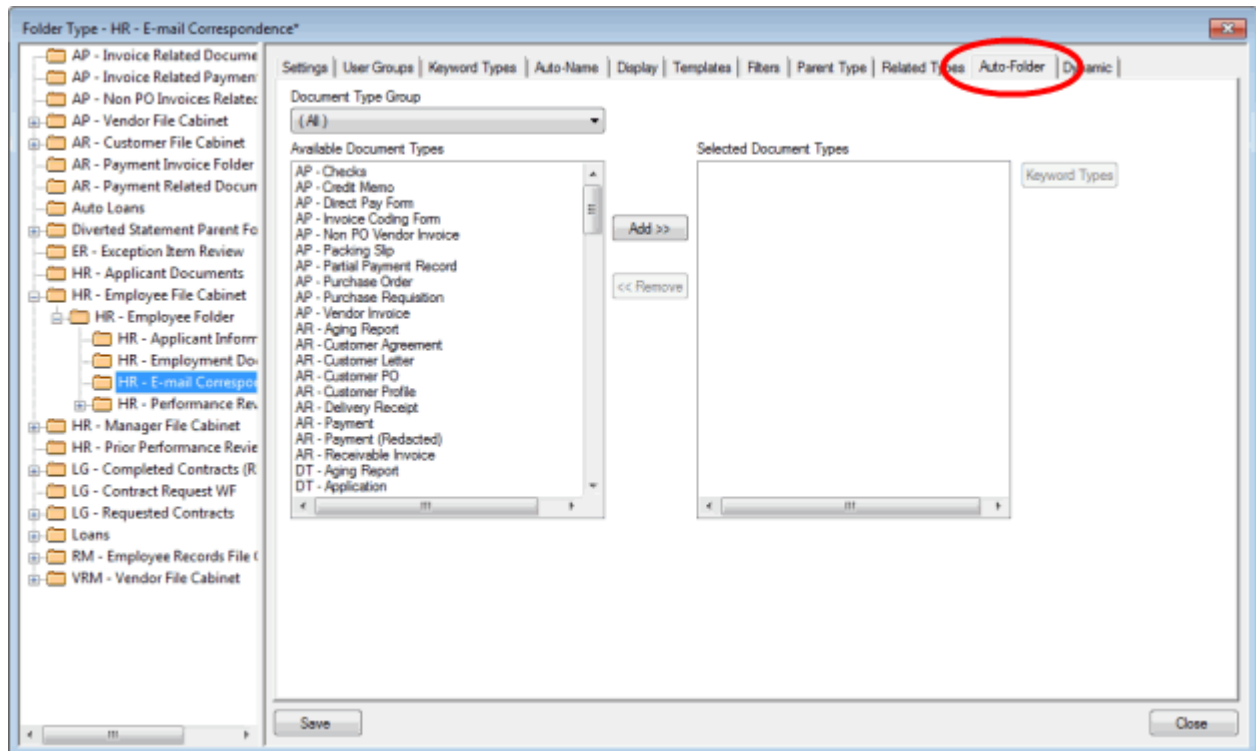
Either way will configure the Document Type for auto-foldering. Changes made to one configuration will be changed in the other configuration.

Folder Type Configuration

You can associate a Document Type with the Folder Type for auto-folding through Folder Type configuration.

1. From the Folder Type configuration (**Document | Folder Type**), select the Folder Type from the folder tree and click the **Auto Folder** tab.

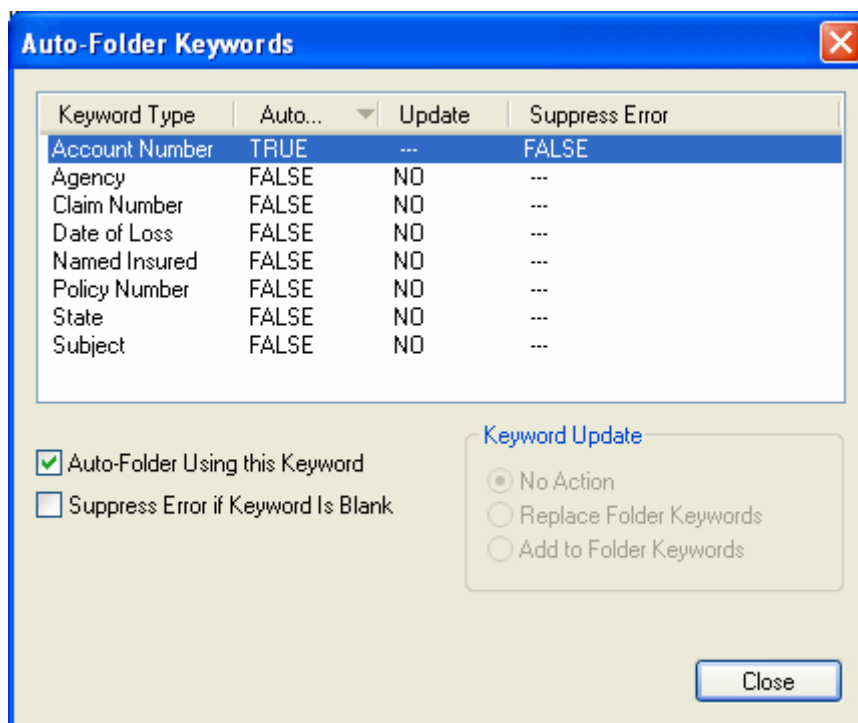
The **Selected Document Types** list displays Document Types available to auto-fold with this Folder Type. Assign Document Types of documents you want to auto-fold.



Tip: To display only Document Types belonging to a specific Document Type Group, select the Document Type Group from the **Document Type Group** filter.

2. Select a Document Type from the **Selected Document Types** list and click **Keyword Types**.

The **Auto-Folder Keywords** dialog box displays all Keyword Types assigned to the selected Document Type.



- Assign the Keyword Types required for auto-folding. Select a required Keyword Type and then select **Auto-Folder Using this Keyword**. This option is available only for Keyword Types common to the Document Type and the Folder Type.

When **Auto-Folder Using this Keyword** is selected, the Keyword Type's **Auto-Folder** status changes from **FALSE** to **TRUE**.

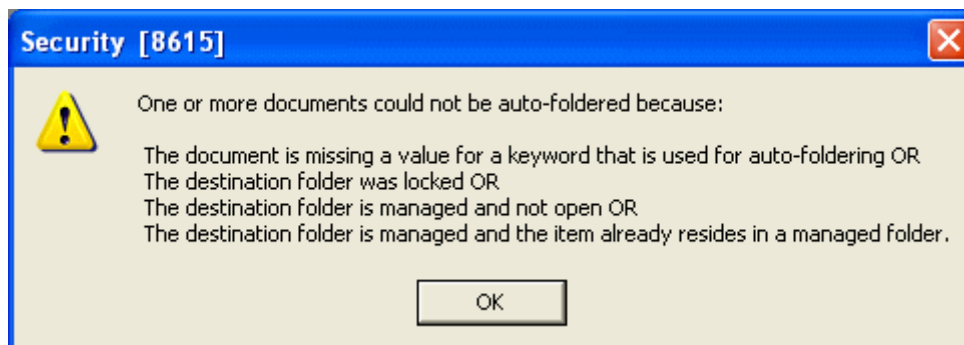
- Assign the Keyword Types required to link the Document Type to its Folder Type and all relevant parent Folder Types. The combination of Keyword Types should ensure that all appropriate documents drill down to the correct folder. For additional information about Keyword Types required for auto-folding, see the following topics:

[Identify Keyword Types for Organizing Folders and Documents on page 117](#)

[Multiple Instances of Keyword Types and Auto-Folding on page 54](#)

Note: When Keyword Types used for auto-folding have multiple values, OnBase automatically creates a separate folder for each Keyword value and places the document in each folder. Ensure that your Keyword Type design will achieve the intended auto-folding results.

- A document will not be auto-foldered if it is missing one or more keywords that are used for auto-foldering. In the OnBase Client, the following error message is displayed unless the document is encountered as part of an automated process:



- To prevent this error message from displaying when the selected Keyword Type is missing a value, select **Suppress Error if Keyword Is Blank**. In Core Services applications, the error is never displayed.
Documents missing Keyword values required for auto-foldering will not be auto-foldered, regardless of whether the error message is suppressed for the Keyword Type.
- Determine whether updating Keyword Types not used for auto-foldering is required. Continue to step 6 to configure Keyword update options.
A Document Type may be assigned several Keyword Types that do not affect the auto-foldering structure. If these Keyword Types are also assigned to Folder Types in the auto-foldering structure, new Keyword values can be added to or replaced on these Folder Types when an auto-foldering process adds or updates documents within the folder structure.
- Specify which Keyword values are updated when an auto-foldering process is performed for an existing auto-foldering structure:
 - Select a Keyword Type that is not required for auto-foldering.
Keyword Update options cannot be configured for Keyword Types required for auto-foldering. New folders are created when values on Keyword Types used for auto-foldering are updated or changed.
 - Select a **Keyword Update** option. The option applies to the Keyword values which have been applied to the auto-folder, to any of its parent folders, and to any of its auto-created child folders. Keywords are not updated on manually created child folders.

Note: If an auto-folder has more than one instance of an auto-created child folder based on the same Folder Type, Keywords are not updated on child folders based on that Folder Type. Keywords are updated on an auto-created child folder only if there is a single instance of the child folder for the auto-created Folder Type. When an auto-folder contains multiple auto-created child folders of the same Folder Type, the OnBase transaction log logs a folder activity subaction of **Folder Keyword Auto-Update Failure**.

Options are described in the following table:

Option	Description
No Action	<p>Folders retain their original values. This is the default setting for all Keyword Types not required for auto-folding.</p> <p>When this option is selected, the Keyword Type's Update status is NO.</p>
Replace Folder Keywords	<p>The new Keyword value replaces the original Keyword value on any folder that would be created through the auto-folder process, including the auto-folder itself and its parent/child folders.</p> <p>For example, if a folder has three Keyword values and the auto-folded document has only one, the three values are replaced with the single Keyword value from the document.</p> <p>When this option is selected, the Keyword Type's Update status is REPLACE.</p> <hr/> <p>Note: In the Web Client and Unity Client, when changing a document's keyword value, folder auto-name strings containing these values may not automatically be updated for the current session. In the Web Client, users must refresh the folders interface to reflect the changes. In the Unity Client, users must select and refresh the parent folder to reflect the changes.</p> <hr/> <p>Note: When Replace Folder Keywords is configured for an auto-folding Folder Type or Document Type in one file cabinet structure, the Keyword Value is only replaced in that structure. Other file cabinet structures containing auto-folding Folder Types or Document Types using the same documents as those configured with this option must be configured separately.</p> <hr/>

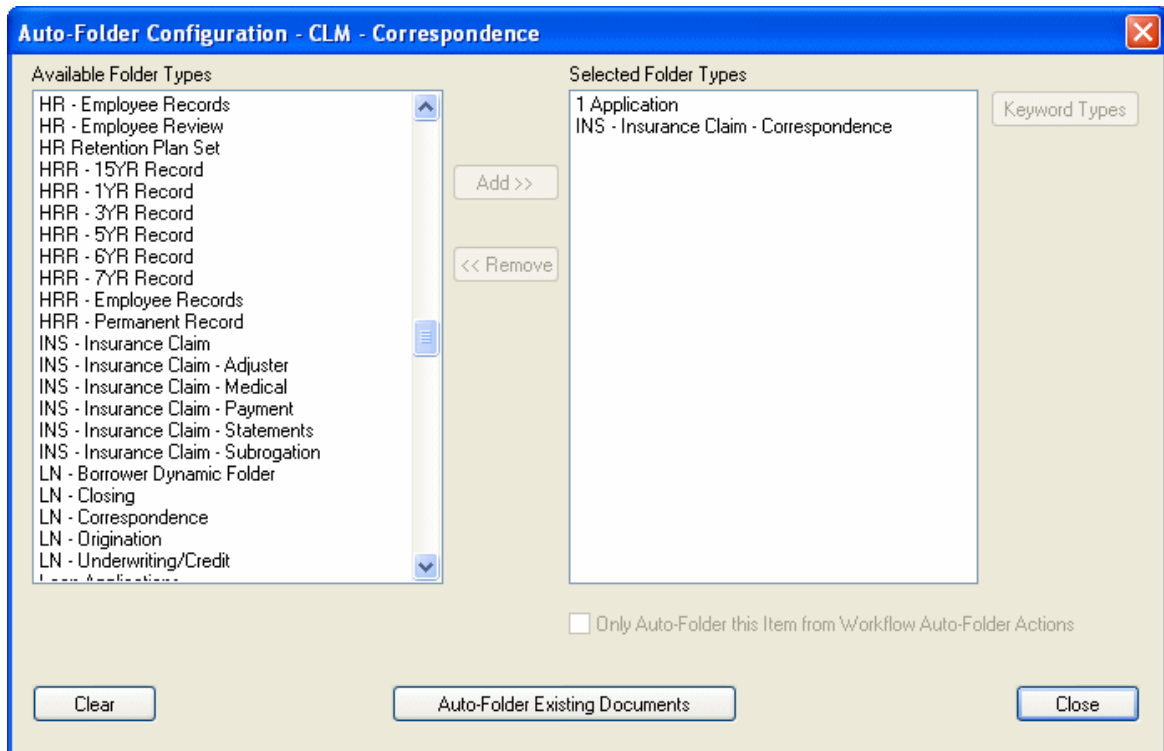
Option	Description
Add to Folder Keywords	<p>Another instance of the Keyword Type is created on any folder that would be created through the auto-folder process, including the auto-folder itself and its parent/child folders. The new instance of the Keyword Type is populated with the new Keyword value. Any existing instances of the Keyword Type retain their original values.</p> <p>For example, if a folder has one value for the Keyword Type and the auto-foldered document has a different value, the folder will have two values for the Keyword Type: the original Keyword value and the Keyword value from the auto-foldered document.</p> <p>When this option is selected, the Keyword Type's Update status is ADD.</p> <hr/> <p>Note: When Add to Folder Keywords is configured for an auto-folding Folder Type or Document Type in one file cabinet structure, the Keyword Value is only added in that structure. Other file cabinet structures containing auto-folding Folder Types or Document Types using the same documents as those configured with this option must be configured separately.</p> <hr/>

- c. Repeat to configure update options for each Keyword Type.
7. Click **Close**.

Document Type Configuration

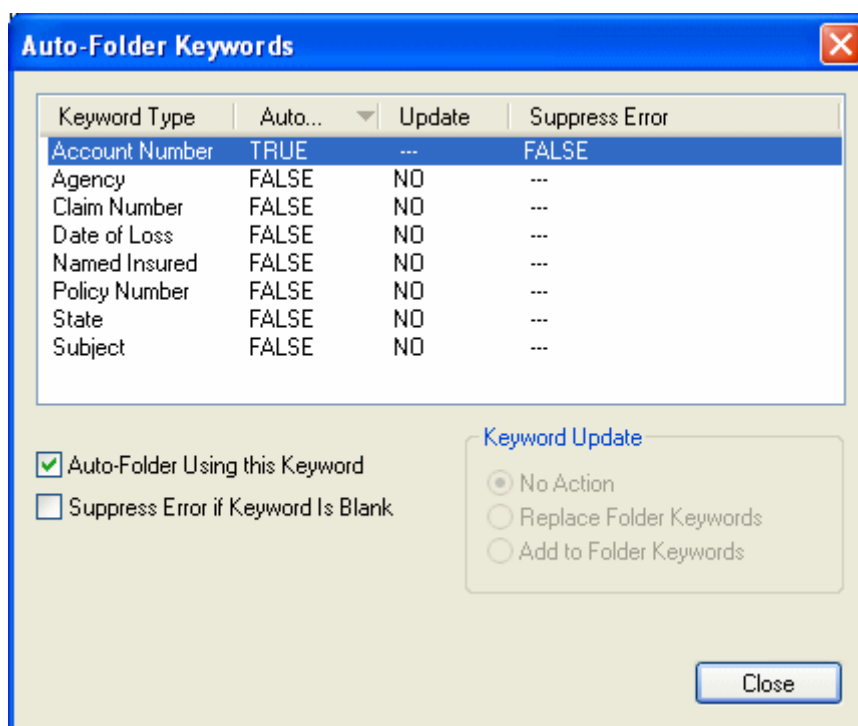
You can associate a Document Type with the Folder Type for auto-folding through Document Type configuration.

1. On the **Document Types** dialog box, click the **Auto-Foldering** button. The **Auto-Folder Configuration** dialog box is displayed.
2. Add Folder Types to the **Selected Folder Types** into which documents of this Document Type will be auto-folded.



3. Select a Folder Type from the **Selected Folder Types** and click **Keywords**.

The **Auto-Folder Keywords** dialog box displays all Keyword Types assigned to the selected Document Type.



- Assign the Keyword Types required for auto-folding. Select a required Keyword Type and then select **Auto-Folder Using this Keyword**. This option is available only for Keyword Types common to the Document Type and the Folder Type.

When **Auto-Folder Using this Keyword** is selected, the Keyword Type's **Auto-Folder** status changes from **FALSE** to **TRUE**.

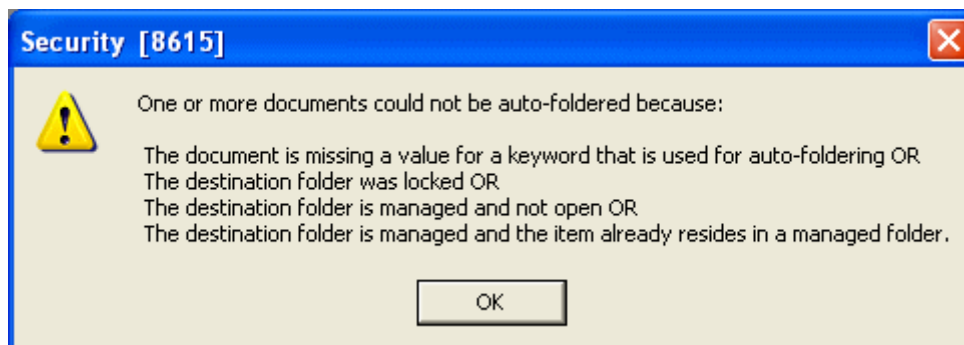
- Assign the Keyword Types required to link the Document Type to its Folder Type and all relevant parent Folder Types. The combination of Keyword Types should ensure that all appropriate documents drill down to the correct folder. For additional information about Keyword Types required for auto-folding, see the following topics:

[Identify Keyword Types for Organizing Folders and Documents on page 117](#)

[Multiple Instances of Keyword Types and Auto-Folding on page 54](#)

Note: When Keyword Types used for auto-folding have multiple values, OnBase automatically creates a separate folder for each Keyword value and places the document in each folder. Ensure that your Keyword Type design will achieve the intended auto-folding results.

- A document will not be auto-foldered if it is missing one or more keywords that are used for auto-foldering. In the OnBase Client, the following error message is displayed unless the document is encountered as part of an automated process:



- To prevent this error message from displaying when the selected Keyword Type is missing a value, select **Suppress Error if Keyword Is Blank**. In Core Services applications, the error is never displayed.
Documents missing Keyword values required for auto-foldering will not be auto-foldered, regardless of whether the error message is suppressed for the Keyword Type.
- Determine whether updating Keyword Types not used for auto-foldering is required. Continue to step 6 to configure Keyword update options.
A Document Type may be assigned several Keyword Types that do not affect the auto-foldering structure. If these Keyword Types are also assigned to Folder Types in the auto-foldering structure, new Keyword values can be added to or replaced on these Folder Types when an auto-foldering process adds or updates documents within the folder structure.
- Specify which Keyword values are updated when an auto-foldering process is performed for an existing auto-foldering structure:
 - Select a Keyword Type that is not required for auto-foldering.
Keyword Update options cannot be configured for Keyword Types required for auto-foldering. New folders are created when values on Keyword Types used for auto-foldering are updated or changed.
 - Select a **Keyword Update** option. The option applies to the Keyword values which have been applied to the auto-folder, to any of its parent folders, and to any of its auto-created child folders. Keywords are not updated on manually created child folders.

Note: If an auto-folder has more than one instance of an auto-created child folder based on the same Folder Type, Keywords are not updated on child folders based on that Folder Type. Keywords are updated on an auto-created child folder only if there is a single instance of the child folder for the auto-created Folder Type. When an auto-folder contains multiple auto-created child folders of the same Folder Type, the OnBase transaction log logs a folder activity subaction of **Folder Keyword Auto-Update Failure**.

Options are described in the following table:

Option	Description
No Action	<p>Folders retain their original values. This is the default setting for all Keyword Types not required for auto-folding.</p> <p>When this option is selected, the Keyword Type's Update status is NO.</p>
Replace Folder Keywords	<p>The new Keyword value replaces the original Keyword value on any folder that would be created through the auto-folder process, including the auto-folder itself and its parent/child folders.</p> <p>For example, if a folder has three Keyword values and the auto-folded document has only one, the three values are replaced with the single Keyword value from the document.</p> <p>When this option is selected, the Keyword Type's Update status is REPLACE.</p> <hr/> <p>Note: In the Web Client and Unity Client, when changing a document's keyword value, folder auto-name strings containing these values may not automatically be updated for the current session. In the Web Client, users must refresh the folders interface to reflect the changes. In the Unity Client, users must select and refresh the parent folder to reflect the changes.</p> <hr/> <p>Note: When Replace Folder Keywords is configured for an auto-folding Folder Type or Document Type in one file cabinet structure, the Keyword Value is only replaced in that structure. Other file cabinet structures containing auto-folding Folder Types or Document Types using the same documents as those configured with this option must be configured separately.</p> <hr/>

Option	Description
Add to Folder Keywords	<p>Another instance of the Keyword Type is created on any folder that would be created through the auto-folder process, including the auto-folder itself and its parent/child folders. The new instance of the Keyword Type is populated with the new Keyword value. Any existing instances of the Keyword Type retain their original values.</p> <p>For example, if a folder has one value for the Keyword Type and the auto-foldered document has a different value, the folder will have two values for the Keyword Type: the original Keyword value and the Keyword value from the auto-foldered document.</p> <p>When this option is selected, the Keyword Type's Update status is ADD.</p> <hr/> <p>Note: When Add to Folder Keywords is configured for an auto-foldering Folder Type or Document Type in one file cabinet structure, the Keyword Value is only added in that structure. Other file cabinet structures containing auto-foldering Folder Types or Document Types using the same documents as those configured with this option must be configured separately.</p> <hr/>

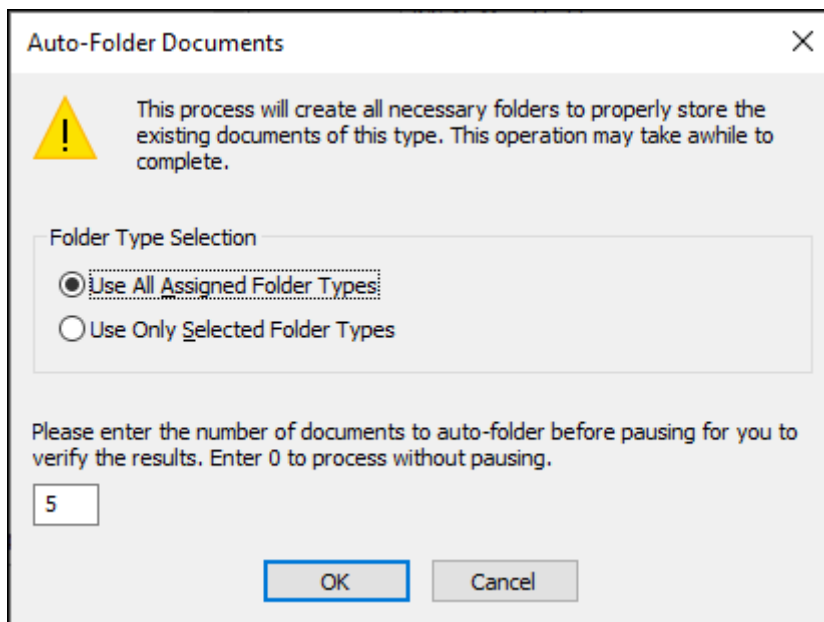
- c. Repeat to configure update options for each Keyword Type.
8. Click **Close**.

Auto-Folder Existing Documents

After completing your auto-folder configuration, you can elect to auto-folder documents that were in OnBase before auto-foldering was configured.

1. From the Configuration module, select **Document | Document Type**.
2. Select the Document Type to auto-folder, and then click the **Auto-Foldering** button.
3. Click **Auto-Folder Existing Documents**. A warning message displays that this process will create all necessary folders to properly store the existing documents of this type and that this operation may take awhile to complete and cannot be undone.
4. Under Folder Type Selection, select **Use All Assigned Folder Types** to auto-folder documents within all folder types in the **Selected Folder Types** pane, or select **Use Only Selected Folder Types** to auto-folder only the highlighted folder types in the **Selected Folder Types** pane.

5. OnBase will test the auto-folding configuration on a sampling of documents before auto-folding all existing documents. Enter the number of documents that you want to use for the test. Enter 0 to process without testing it.



6. Click **OK**. OnBase auto-folders the documents and then prompts you to verify that the documents were auto-folded as expected in the OnBase Client. Click **OK**. The following message is displayed:
Do you wish to process the remaining documents?
7. If you click **Yes**, OnBase automatically auto-folders all documents of this Document Type according to your configured auto-folding scheme.

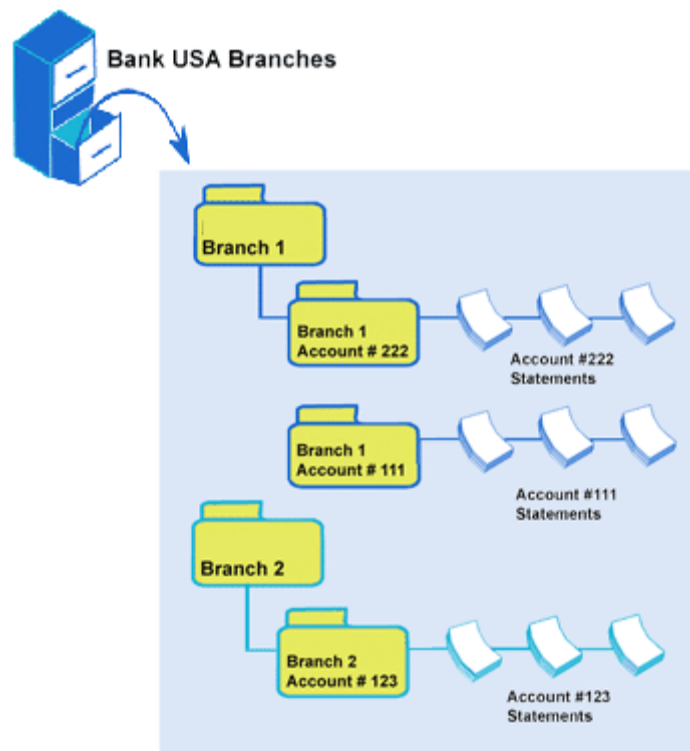
Note: You can also auto-folder existing documents from the OnBase Client by selecting the desired document(s) and re-indexing them. Do not change any Keyword values. Select **File | Re-Index** and click **Index**. The document will be auto-folded according to your configured auto-folding scheme.

Example of Parent - Child and Keyword Relationships for Folder Types

Note: Print this page for reference by right-clicking and selecting **Print**. See your System Administrator if you are not able to print.

1. First Level - File Cabinet
 - Folder Type - Bank USA Branches File Cabinet
 - No Keyword Types Assigned
 - No Parent Folder Type Assigned
2. Second Level - Folder
 - Folder Type - **Bank USA Branch Number**
 - Keyword Type Assigned - **Branch Number**
 - Parent Folder Type - **Bank USA Branches File Cabinet** (First Level Folder Type)
3. Third Level - Folder
 - Folder Type - **Customer Account #**
 - Keyword Type Assigned - **Branch Number** and **Account #**
 - Parent Folder Type - **Bank USA Branch Number** (Second Level Folder Type)
4. Fourth Level - Document
 - Document Type - Bank Account Statements
 - Keyword Type - **Branch Number** and **Account #**

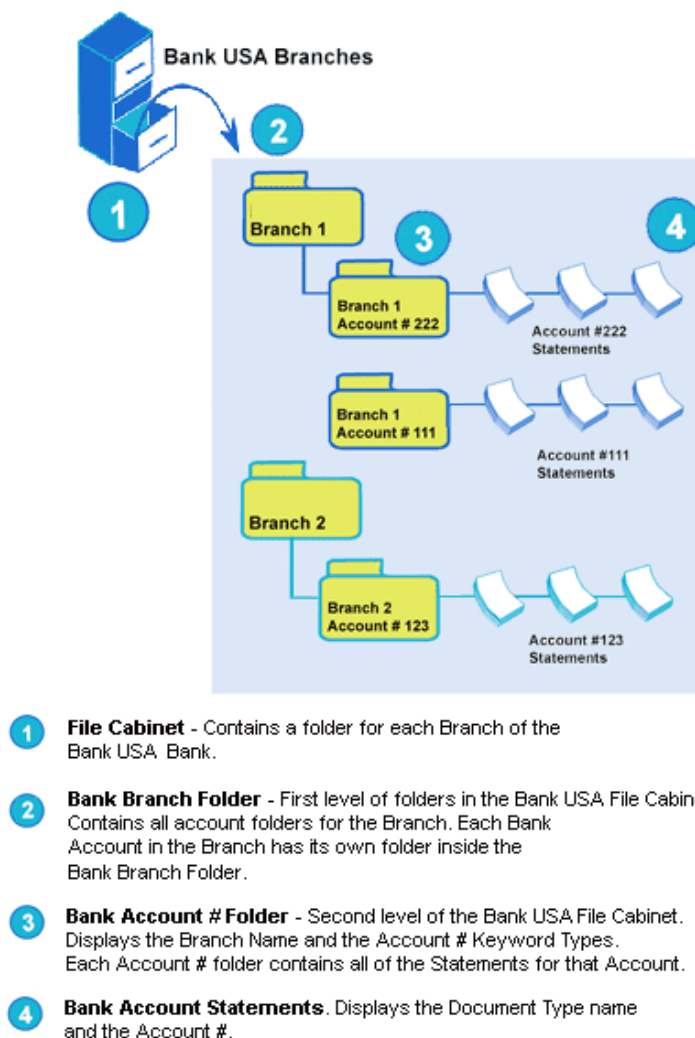
With this configuration, Branch Number will be available as a common parent Keyword Type for the Customer Account # Folder Type.



Example of an Auto-Foldering Document Type

In this example, both the **Bank Account Folder Type** and the **Bank Account Statements Document Type** have the Keyword Types **Branch Number** and **Account #** assigned. Keyword Types are assigned to Document Types from the following **Document Types** dialog box options:

- **Keyword Types**, which displays the **Keyword Type Assignment** dialog box.
- **Auto-Foldering**, which displays the **Auto-Folder Configuration** dialog box. Selecting **Keyword Types** displays the **Auto-Folder Keywords** dialog box.



Folder Type Custom Queries

Users can search for and retrieve OnBase folders by running Custom Queries in the OnBase Client and Unity Client. Folder Type Custom Queries offer the following benefits:

- Users can retrieve multiple folders across multiple Folder Types.
- Results are opened in the File Cabinets window, allowing users to view folder contents in an organized manner.
- HTML Custom Queries provide an easy-to-use, custom graphical interface.
- The folder results list is sortable, allowing users to find folders quickly.

Configuration Overview for Folder Type Custom Queries

Folder Type queries are configured similarly to Document Type and Document Type Group queries. As with other Custom Query types, both standard and HTML Custom Queries can be used to retrieve folders.

Before configuring a Folder Type query, notice the following limitations:

- Folder Type Custom Queries can be executed in the OnBase Client, Unity Client, and Web Client.
- Application Enabler does not support Folder Type Custom Queries.

Complete the following tasks:

1. [Creating the Folder Type Custom Query on page 142](#)
Perform these steps to designate a Custom Query as a Folder Type Custom Query.
2. [Configuring Custom Queries - Folder Type Query on page 144](#)
Perform these steps to assign Folder Types and retrieval Keyword Types to the query.

Creating the Folder Type Custom Query

Create the Custom Query as described in the Configuration help files topic, "Configuring Custom Queries." The following steps describe how to designate a Custom Query for Folder Types.

1. In OnBase Configuration, select **Queries | Custom Queries**.
2. Select the Folder Type query.

3. Click **Settings** to open the **Custom Query Options** dialog box.

Instructions

Custom Query Type

☒ By Document Type

☐ Sort by Document Type
 ☐ Restrict by Rights

☐ By Document Type Group

☐ By Folder Type

☐ Sort by Folder Type
 ☐ Restrict by Rights

☐ By Keyword

☐ Custom Written SQL

Edit SQL

☐ Full Text

Advanced Options

☐ Minimize Duplicate Documents

Optional Controls

☒ Keyword Edit Fields

☐ Keyword Select List
 ☐ Value Operators
 ☐ Binary Operators

☐ Text Search Button

☒ Use HTML Form

...

☐ Use OR for duplicates

Usage

☐ Workflow Filter

Assign

☐ Folder Filter
 ☐ Mobile Device Accessible

Retrieval Options

☒ View Documents
 ☐ View Selection List
 ☐ Return Reference

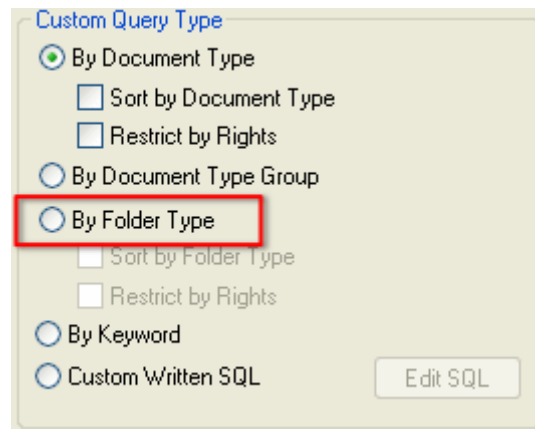
Date Search Options

☐ No Date
 ☐ Single Date
 ☒ Date Range

Save

Cancel

4. Select **By Folder Type** as the Custom Query Type.



Custom Query Type

☒ By Document Type

☐ Sort by Document Type

☐ Restrict by Rights

☐ By Document Type Group

☐ By Folder Type

☐ Sort by Folder Type

☐ Restrict by Rights

☐ By Keyword

☐ Custom Written SQL

Edit SQL

5. Select **Sort by Folder Type** if you want to specify the sort order of folder results. This option enables the **Move Up** and **Move Down** buttons when you later assign Folder Types to the Custom Query.

Note: Folders returned by a Custom Query are always sorted by Folder Type in the Web Client, regardless of whether the **Sort by Folder Type** option is selected.

6. Select **Restrict by Rights** if the Custom Query should return only folders that users have rights to view. Otherwise, all folders that satisfy Custom Query parameters are returned. Users still can open only folders that they have rights to view.

Note: Folders returned by a Custom Query are always restricted by rights in the Web Client, regardless of whether the **Restrict by Rights** option is selected.

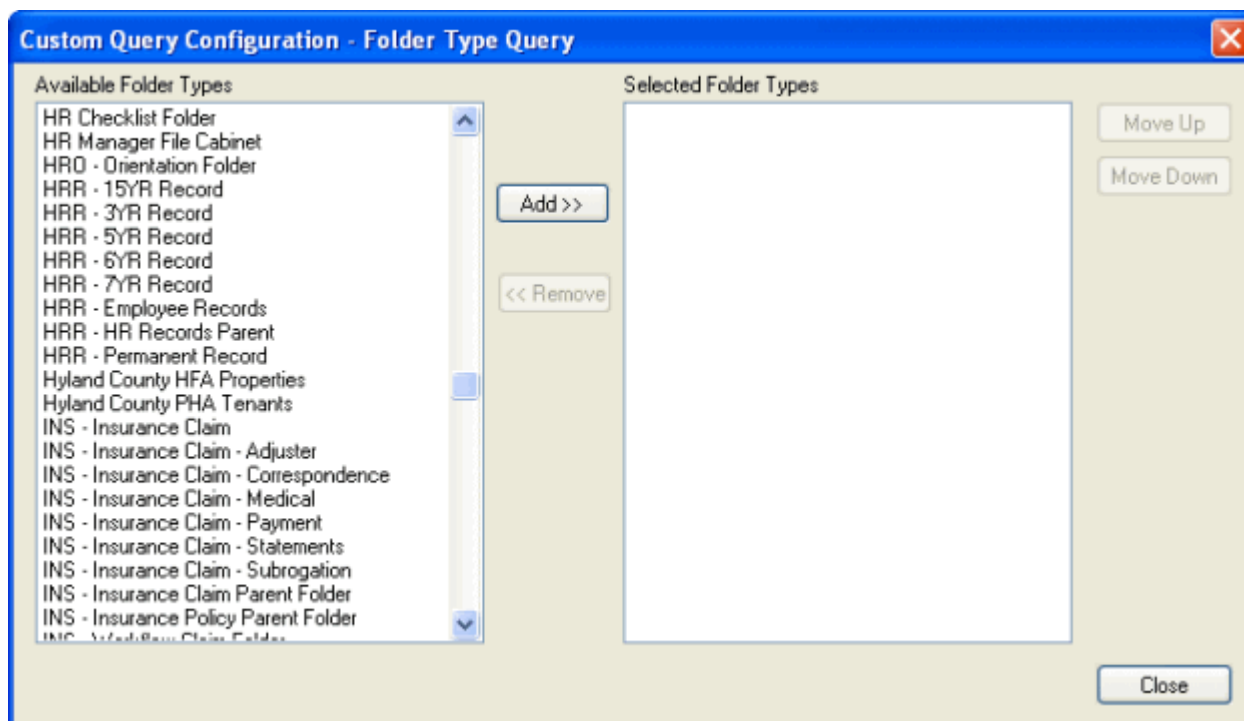
7. Apply additional settings as needed. Settings that do not apply to Folder Type Custom Queries are unavailable. For information about each setting, see the “Configuring Custom Queries” topic in the Configuration help.
8. Click **Save**.
9. Proceed to [Configuring Custom Queries - Folder Type Query on page 144](#).

Configuring Custom Queries - Folder Type Query

Folder Type Custom Queries return folders of specified Folder Types. Use these steps to assign Folder Types and retrieval Keyword Types to a Folder Type query.

1. In OnBase Configuration, select **Queries | Custom Queries**.
2. Select the Folder Type query from the **Custom Query** dialog box.

- Click **Folder Type Query** to display the **Custom Query Configuration** dialog box.



Note: If the **Folder Type Query** button is unavailable, make sure that **By Folder Type** is selected in the Custom Query's settings.

- Select the Folder Types to include in the query and click **Add**.
- If the **Sort by Folder Type** option has been selected in Custom Query Options, then the **Move Up** and **Move Down** buttons are available. Use these buttons to specify the sort order of Folder Types in query search results.
- Click **Close**.
- Click **Retrieval Keywords** to specify the Keyword Types by which users can search. Only Keyword Types common to all selected Folder Types are available.
- Select the Keyword Types to use and click **Add**.
- Click **Move Up** or **Move Down** to change the display order of Keyword Types in the OnBase Client. The Keyword Type order does not apply to Custom Queries that use an HTML form.
- Click **Close**.
- Continue configuring the Custom Query as described in the Configuration module help under the heading "Queries and VB Scripts." Be sure to configure the following parameters:
 - User Groups
 - Icon
 - Display Columns
 - Sort Columns

Folder Administration

The following topics provide information about administering folders in the OnBase Client:

- [Viewing a Folder's History on page 147](#)
- [Folder Maintenance on page 151](#)

Viewing a Folder's History

A folder's history is a log of all the actions performed on the folder in OnBase. If you have sufficient administrative rights, you can view a history of a folder. A folder's history allows you to:

- See who has viewed a folder and ensure only authorized users are accessing it.
- See how a folder has changed over time, including who changed it and when.
- Evaluate which folders are being used and how frequently. For example, you can use this information to determine whether it's safe to remove a folder and whom to contact before deleting it.

Note: If documents were added to or removed from a folder prior to OnBase 5.0, these actions are not displayed in the folder's history. Other actions performed prior to OnBase 5.0 are displayed.

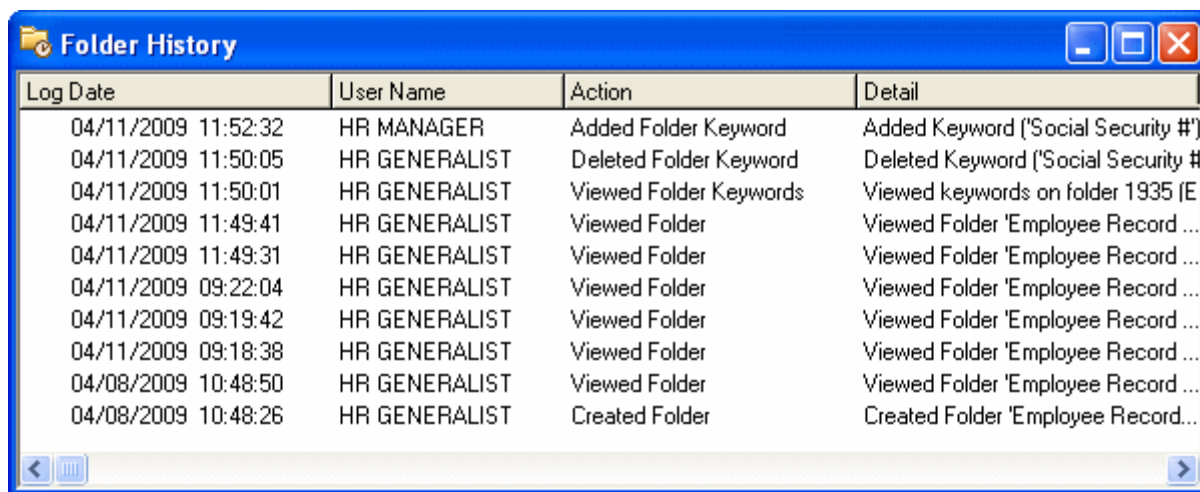
Note: Changes made to folder Keyword Values and folder dates in OnBase 8.2 and earlier are logged under the **Modify Folder Keywords** action. In OnBase 9.0 and later, changes to folder Keyword Values are logged under **Added Folder Keyword** and **Deleted Folder Keyword**, and changes to folder dates are logged under **Modified Folder Date**.

To view a folder's history:

1. Log on to the OnBase Client.
2. Open either the File Cabinets window or Folder Maintenance.
3. Select the folder whose history you want to view.

If you are using the classic File Cabinets window, the folder must be selected in the **Child Folders** pane.

- Right-click and select **History**. The folder's history is displayed in the **Folder History** dialog box. Click any of the column headers to sort by that column.



Log Date	User Name	Action	Detail
04/11/2009 11:52:32	HR MANAGER	Added Folder Keyword	Added Keyword ('Social Security #')
04/11/2009 11:50:05	HR GENERALIST	Deleted Folder Keyword	Deleted Keyword ('Social Security #')
04/11/2009 11:50:01	HR GENERALIST	Viewed Folder Keywords	Viewed keywords on folder 1935 (E
04/11/2009 11:49:41	HR GENERALIST	Viewed Folder	Viewed Folder 'Employee Record ...
04/11/2009 11:49:31	HR GENERALIST	Viewed Folder	Viewed Folder 'Employee Record ...
04/11/2009 09:22:04	HR GENERALIST	Viewed Folder	Viewed Folder 'Employee Record ...
04/11/2009 09:19:42	HR GENERALIST	Viewed Folder	Viewed Folder 'Employee Record ...
04/11/2009 09:18:38	HR GENERALIST	Viewed Folder	Viewed Folder 'Employee Record ...
04/08/2009 10:48:50	HR GENERALIST	Viewed Folder	Viewed Folder 'Employee Record ...
04/08/2009 10:48:26	HR GENERALIST	Created Folder	Created Folder 'Employee Record...

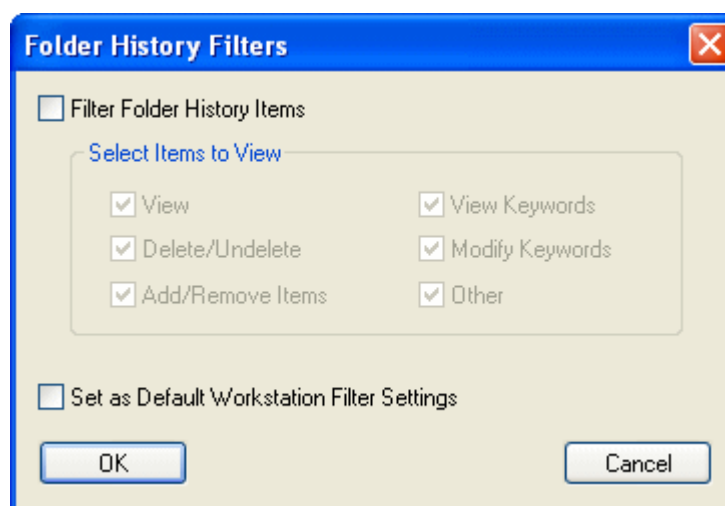
Note: When items are sorted by action, they are grouped by action type. All other columns sort items either chronologically or alphabetically.

Filtering a Folder's History

Use folder history filters to display a subset of actions performed on the folder.

Tip: Save a filter to apply it to each subsequent Folder History window you open. This feature is helpful if you don't want to see an item for every time a user viewed a folder, for example.

- Right-click within the Folder History window and select **Filter Items**. The **Folder History Filters** dialog box displays actions you can use to filter the folder's history.



Folder History Filters

☐ Filter Folder History Items

Select Items to View

<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> View Keywords
<input checked="" type="checkbox"/> Delete/Undelete	<input checked="" type="checkbox"/> Modify Keywords
<input checked="" type="checkbox"/> Add/Remove Items	<input checked="" type="checkbox"/> Other

☐ Set as Default Workstation Filter Settings

OK Cancel

2. Select **Filter Folder History Items** to turn on filtering. To turn off filtering, clear this option.
3. Select or clear the types of actions you want to view. Available options are described in the following table:

Option	Description
View	Viewing the folder and its child folders.
Delete/Undelete	Sending the folder to Folder Maintenance or undeleting the folder.
Add/Remove Items	Adding/removing folder documents.
View Keywords	Viewing folder Keyword Values.
Modify Keywords	Changes to folder Keyword Values.
Other	Actions that fall outside of the above categories, such as the folder's creation.

4. Select **Set as Default Workstation Filter Settings** to save the selected filter options.
 - This option saves the current filter as a workstation setting. Whenever a folder's history is accessed from the current workstation, the selected filters are applied.
 - If you do not select this option, then the default filter behavior remains unchanged.
5. Click **OK**. The folder's history displays the actions you selected.

The word **(Filtered)** is displayed in the Folder History title bar, indicating that filtering is turned on. To turn off filtering, see the following procedure.

Turning Off Folder History Filters

The following steps describe how to turn off filtering in the Folder History window.

1. Right-click within the Folder History window and select **Filter Items**.
2. Clear the **Filter Folder History Items** option.
3. Select the **Set as Default Workstation Filter Settings** option to have filtering turned off by default. Clear this option to retain the default filter behavior.
4. Click **OK**. All logged actions are displayed in the Folder History window, and **(Filtered)** is removed from the title bar.

Generating a Folder History Report

Generate folder history reports to maintain records of all actions performed on a folder. History reports are generated in a text report format and stored in the **SYS User Reports** Document Type. Because history reports are text documents, you can use text searching to find information about a specific action, such as when a Keyword Value was changed. This feature is useful when a folder has a long history of actions.

Folder history reports are generated from an open Folder History window. To generate a folder history report, right-click in the Folder History window and select **Generate Report**. When generation is complete, the report is both archived to the **SYS User Reports** Document Type and displayed on your screen.

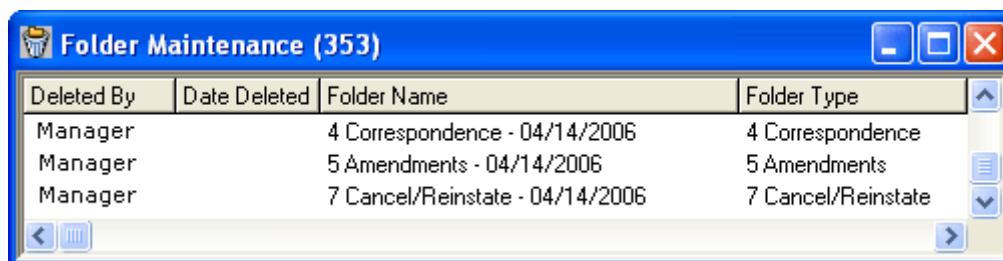
Note: If you accessed the Folder History window from a folder displayed in a pop-up list, the generated report is not displayed, and a message indicates that the report has been archived. You can retrieve the report from the **SYS User Reports** Document Type.

Tip: To create records of all actions performed on all folders, generate folder activity reports. In the OnBase Client, select **Admin | Transaction Logs | Create Report** and then select **Folder Activity**. More information about the OnBase Transaction Log is available in the Configuration module help under “Transaction Log.”

Folder Maintenance

The Folder Maintenance window lists the folders deleted from OnBase. Access Folder Maintenance to permanently purge folders from OnBase or restore folders you still need.

1. In the OnBase Client, select **Admin | Utilities | Folder Maintenance**. The Folder Maintenance window is displayed.



2. Select the folder(s) to modify.
3. Select one of the following right-click menu options:
 - **Undelete Selected** - Restores the folders to the locations where they resided before being deleted.
If both a child folder and its parent were deleted, you cannot restore the child folder without first restoring its parent folder.
 - **Purge Selected** - The selected folder(s) and any children are removed permanently and are no longer retrievable in OnBase through any means. Documents that resided in purged folders are not purged.
 - **Purge All** - All folder(s) in Folder Maintenance and any of their children are removed permanently and are no longer retrievable in OnBase through any means. The documents in purged folders are not purged.
 - **Schedule Purge** - Opens the **Schedule Management** window and allows you to schedule folder purges.
 - **Schedule Delete Orphans** - Opens the **Schedule Management** window and allows you to schedule folder orphans deletions or purges.
 - The remaining commands—**Keywords**, **History**, **Properties**, **Clear Selected**, and **Refresh**—work the same as they do in the File Cabinets window.

Note: If you modify a Keyword Value displayed in a folder's Auto-Name, the Auto-Name does not reflect the modified value while the folder resides in Folder Maintenance. If you undelete the folder, the Auto-Name reflects the modified value on the restored folder in the File Cabinets window.

Scheduling Folder Purge/Deletion

Performing folder purge/deletion processes from Folder Maintenance can incur a large drain on your OnBase solution's resources, especially if you are removing a large number of folders or orphaned folders. Scheduling a folder purge/deletion process is an easy way to automatically purge folders or delete orphaned folders during off-peak hours and save solution resources.

Note: Unlike other scheduled processes, a folder purge/deletion process can only be configured by accessing the Scheduler via the Folder Maintenance window.

Processing modules, such as COLD, DIP, and Document Imaging, can also use scheduled processes to bring documents into OnBase. Attempting to run more than one process at once will result in a dramatic drop in all processing speeds; it is recommended to run a single automated process at a time.

Note: Scheduled folder purge/deletion processes cannot be included as part of a scheduled Process Job.

Requirements for Configuring/Executing a Scheduled Folder Purge/Deletion

To configure a scheduled process to purge folders from Folder Maintenance or delete orphaned folders, a user must belong to a user group with the **API**, **Client**, **Utilities**, and **Client Scheduler** product rights, as well as rights to the Folder Types of the folders that are to be removed. A scheduled purge/deletion can be configured on any OnBase Client workstation, not just the processing workstation or a workstation running with the **-SCHED** command line switch.

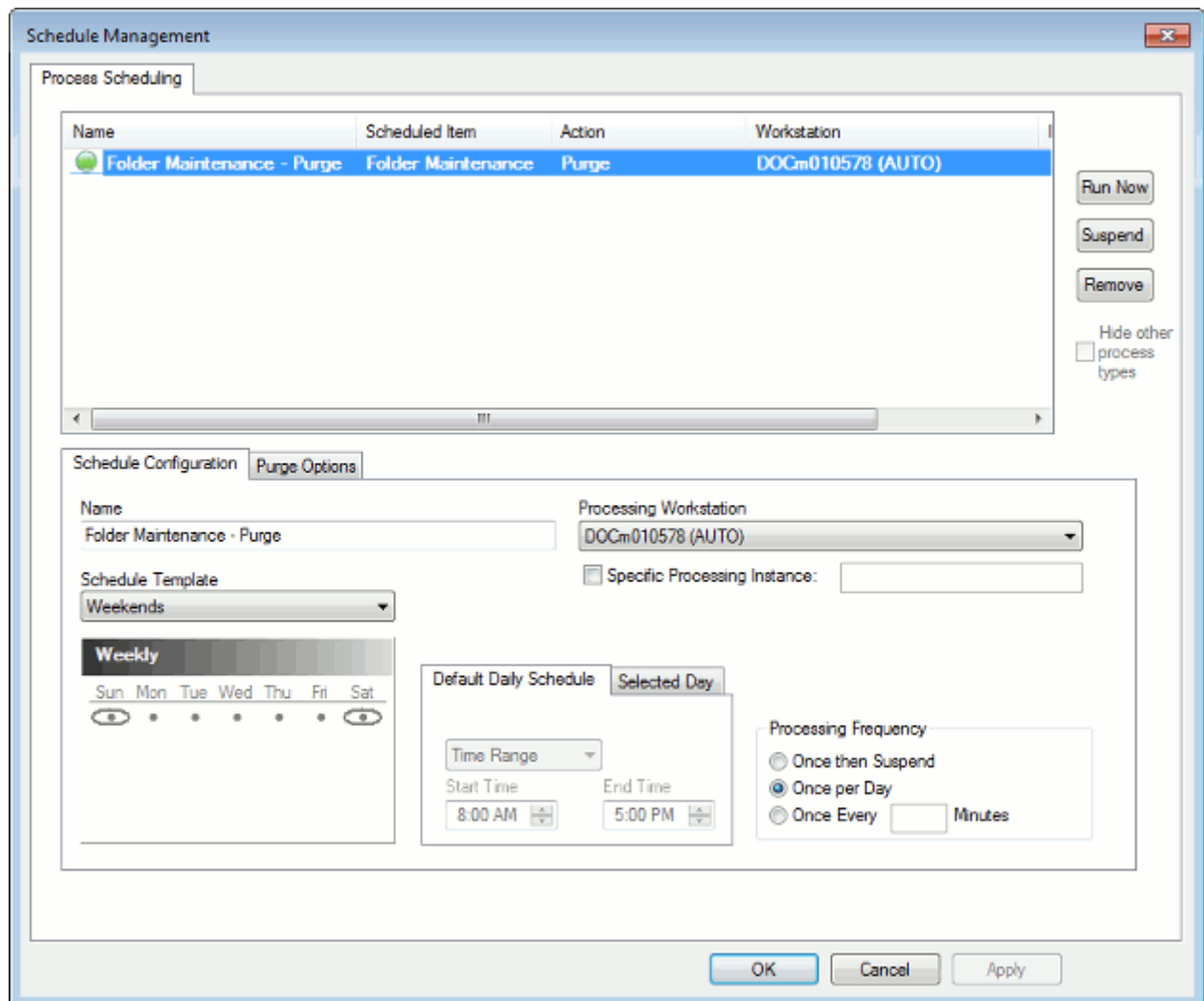
Note: Any folders residing in Folder Maintenance that belong to a Folder Type that the configuring user does not have rights to will not be removed as part of the scheduled purge/deletion process.

To run a scheduled purge/deletion process, OnBase must be running with the **-SCHED** command line switch on the processing workstation in order for the scheduled process to be executed at the configured time. The user account logged onto OnBase at this time needs only the **Client** product right in order for the process to be run.

Creating a Scheduled Folder Purge/Deletion Process

To schedule a purge/deletion of folders from Folder Maintenance:

From the Folder Maintenance window, right-click and select **Schedule Purge** or **Schedule Delete Orphans**. The **Schedule Maintenance** window is displayed.



Note: Accessing the Scheduler from Folder Maintenance will allow you to also view other scheduled processes (i.e., scheduled sweeps, scheduled COLD processes, etc.). However, accessing the Scheduler from other locations (i.e., the Document Imaging window, the COLD Queue) will allow you to view or modify scheduled purge/deletion processes only if you have the **Utilities** product right.

A new scheduled process is added to the Scheduled Items box. It is selected by default.

Schedule Configuration

The first options that must be configured for the scheduled process are the Schedule Configuration options on the **Schedule Configuration** tab. This tab is displayed by default.

1. In the **Name** field, enter a name for the scheduled process.
2. Using the **Processing Workstation** drop-down, select the workstation that will be used to run the scheduled process.

Note: This workstation will need to be running with the **-SCHED** or **-SCHEDINST** command line switch in order to run the scheduled process.

3. If you always want the scheduled process to be run from a specific instance of the OnBase Client, select the **Specific Processing Instance**, then enter the name of the instance in the **Specific Processing Instance** text field.

Note: If you select the **Specific Processing Instance** option but leave the **Specific Processing Instance** text field blank, the scheduled process can be run from any instance of the OnBase Client.

4. Using the **Schedule Template** drop-down, select one of the schedule templates for the process or select **<Custom Schedule>** to manually configure the schedule for this process.

Note: For information on creating a **Custom Schedule** or **Schedule Template**, see below.

5. Select how often you would like the scheduled process to run by selecting one of the Processing Frequency radio buttons.
 - **Once then Suspend.** The scheduled item will be processed once, then the scheduled process is suspended.
 - **Once per Day.** The scheduled item will be processed once per day.

Note: If the scheduled item is modified, the process may be run again on the same day.

- **Once every "" Minutes.** The scheduled item is processed in the interval (measured in minutes) entered in the field. The maximum number of minutes that can be entered is 99999.

Caution: This option is only supported when the **Default Daily Schedule** is set to **Time Range**. If your **Default Daily Schedule** is set to **Specific Time**, the scheduled item will only be processed at the specified time.

6. When you are finished setting the **Schedule Configuration** options, click **Apply**.

Calendar

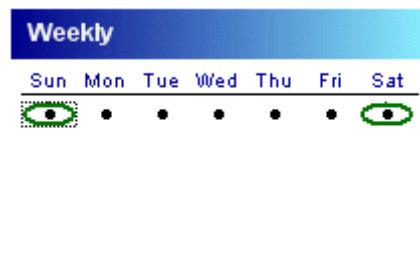
The calendar is used to select the day(s) on which a scheduled process should be run.

Note: The calendar is displayed based on your Workstation Regional Settings and the OnBase language DLL that you are using.

To change the view of the calendar, click the calendar heading (in the example above, **Weekly**) to display a menu. Select one of the following options to display a different calendar for configuration:

- **Weekly**. Allows you to configure a process to run on a certain day of the week (i.e., Thursday).
- **Monthly**. Allows you to configure a process to run monthly, on a particular date (i.e., the 1st and 15th of the month).
- **Monthly (Day-Relative)**. Allows you to configure a process to run on a relative day of the month (i.e., the first Saturday of the month, the 2nd Wednesday of the month).
- **Annual**. Allows you to configure a process to run on a certain day of the year (i.e., June 30).
- **Full Calendar**. Allows you to configure a process to run on specified days of specified years (e.g., August 10, 2011 and/or July 17, 2012).

To select days that you would like to run a scheduled process, double-click the day on the calendar. The selected day is circled.

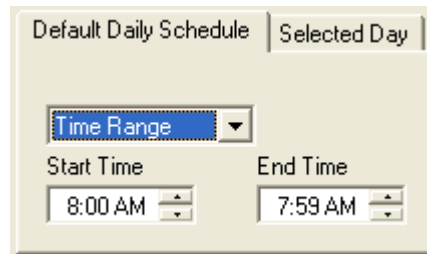


Note: In the example above, two days are selected but **Sunday** is the currently-selected day.

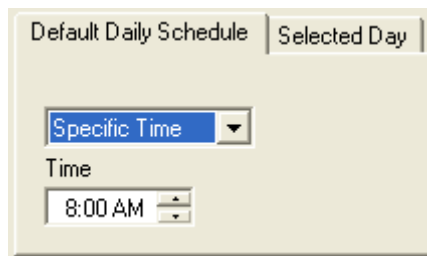
To deselect a day, double-click it.

Default Daily Schedule

The **Default Daily Schedule** tab allows you to configure the processing configuration for all days that do not have a **Selected Day** tab configuration.



The screenshot shows the 'Default Daily Schedule' tab selected. A dropdown menu is set to 'Time Range'. Below it, there are two time selection boxes: 'Start Time' set to 8:00 AM and 'End Time' set to 7:59 AM.



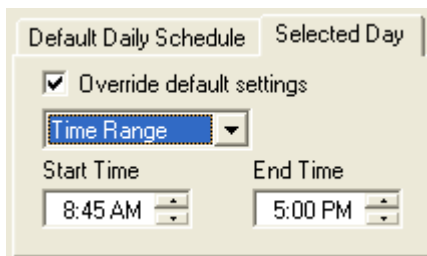
The screenshot shows the 'Default Daily Schedule' tab selected. A dropdown menu is set to 'Specific Time'. Below it, there is a single time selection box labeled 'Time' set to 8:00 AM.

The drop-down list allows you to select **Time Range** or **Specific Time**. If you select **Time Range**, a **Start Time** box and an **End Time** box are displayed. Define the range of time in which you want your job or format to begin processing. If you select **Specific Time**, a **Time** box is displayed. Select the time at which you want the job or format to begin processing.

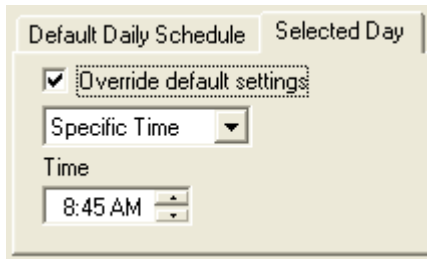
Tip: Specifying a **Time Range** and using the **Once Per Day** option will allow a scheduled process to run even if another process runs over its starting time, as long as the process is able to start within the specified range.

Selected Day

The **Selected Day** tab allows you to specify settings for the selected day that differ from the settings specified in the **Default Daily Schedule** tab. In order for the **Selected Day** tab to be enabled, you must click a day to select it and you must select the **Override default settings** check box.



The screenshot shows the 'Selected Day' tab selected. The 'Override default settings' checkbox is checked. A dropdown menu is set to 'Time Range'. Below it, there are two time selection boxes: 'Start Time' set to 8:45 AM and 'End Time' set to 5:00 PM.



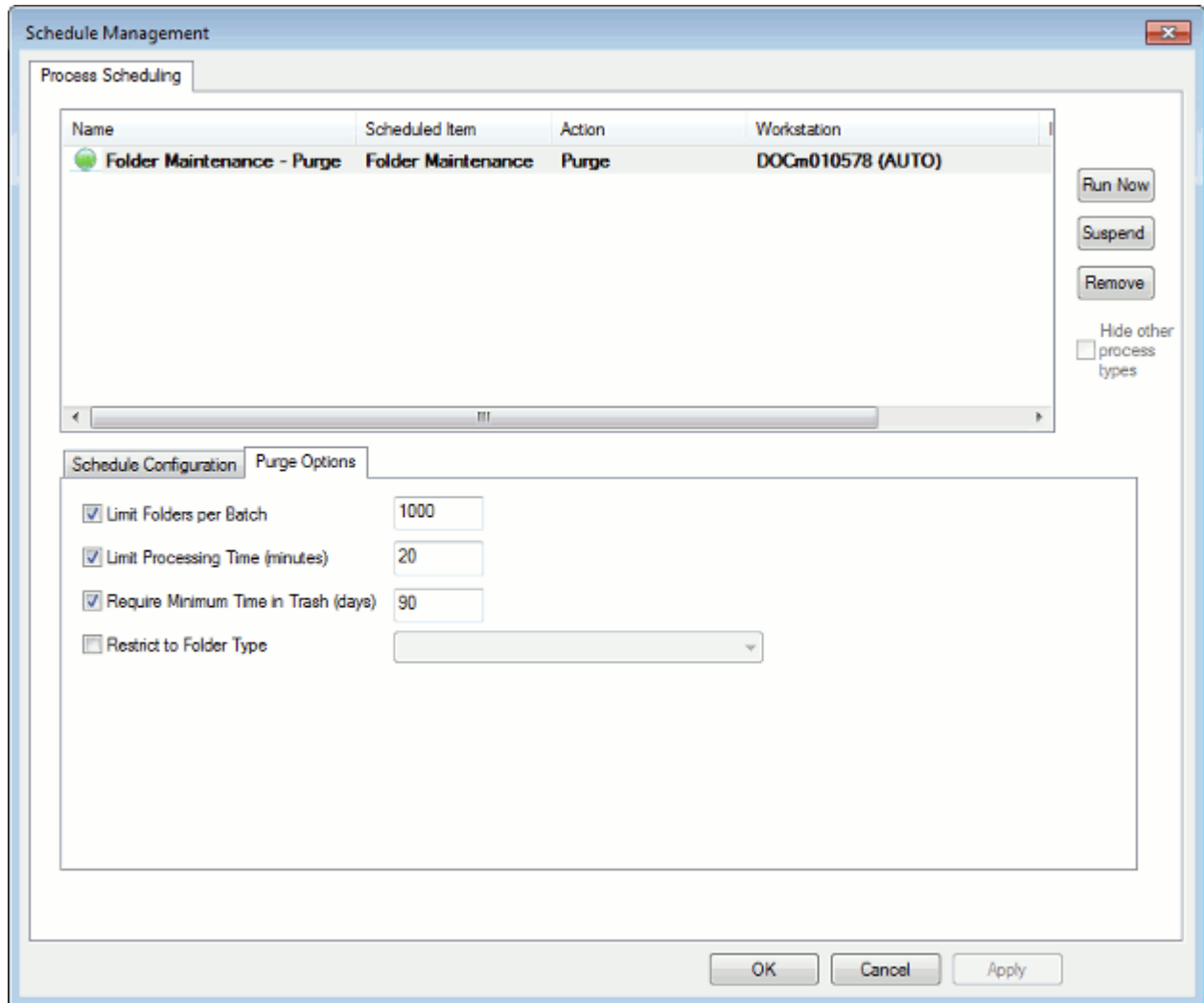
The drop-down list allows you to select **Time Range** or **Specific Time**. If you select **Time Range**, a **Start Time** box and an **End Time** box are displayed. Define the range of time in which you want your job or format to begin processing. If you select **Specific Time**, a **Time** box is displayed. Select the time at which you want the job or format to begin processing.

Tip: Specifying a **Time Range** and using the **Once Per Day** option will allow a scheduled process to run even if another process runs over its starting time, as long as the process is able to start within the specified range.

Specifying Purge Options

If you selected **Schedule a Purge** from the Folder Maintenance right-click menu to schedule a purge of all folders residing in Folder Maintenance:

1. After the Schedule Configuration options are configured on the **Schedule Configuration** tab, select the **Purge Options** tab from the **Schedule Management** window.



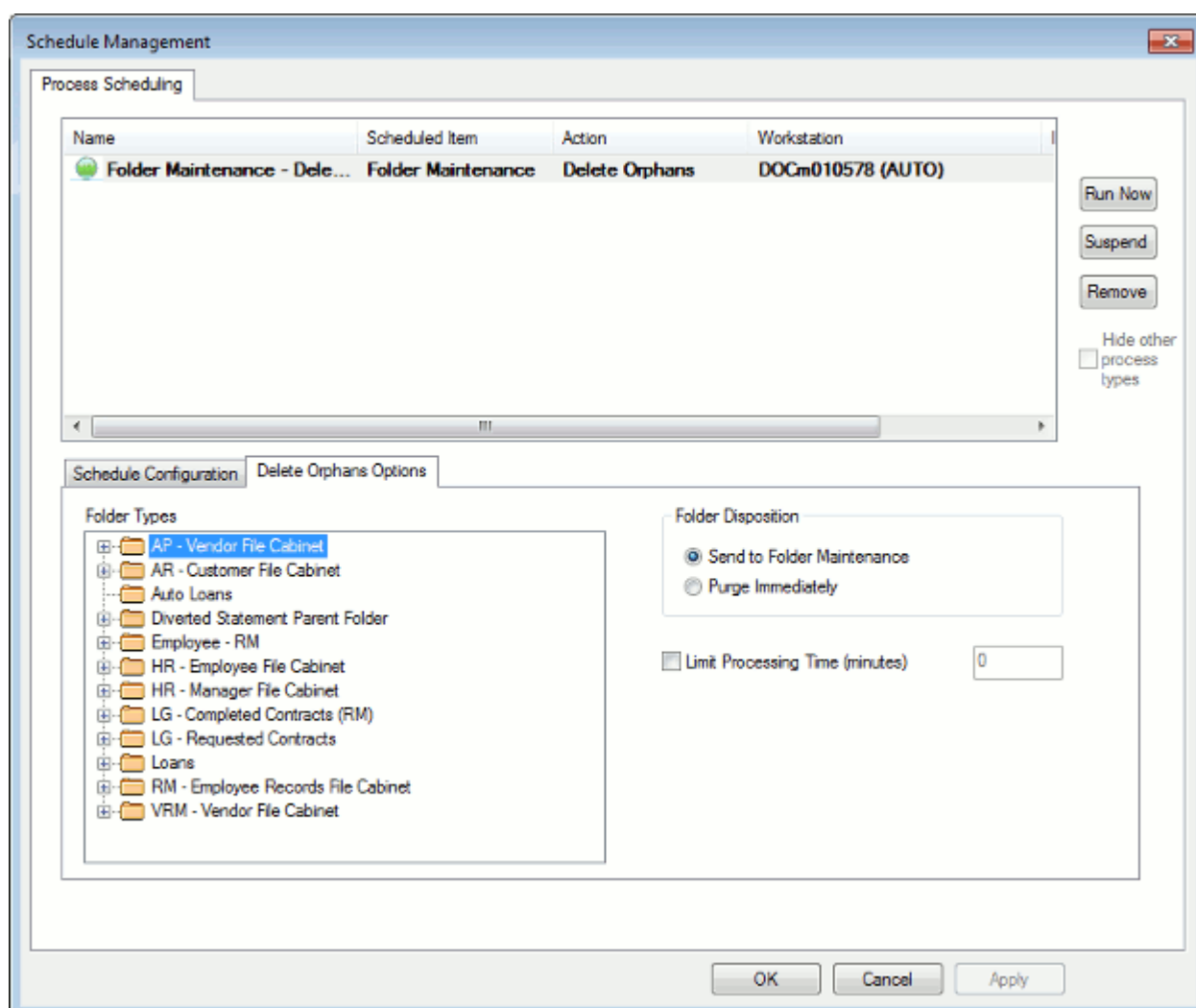
2. Set the following Purge Options. These options can be used in conjunction with one another and all, some or none of the options need to be selected.
 - To limit the number of folders that can be purged by one process, select the **Limit Folders per Batch** check box and enter the maximum number of folders that can be purged by one process in the associated field.
 - To limit the amount of time that one process can run, select the **Limit Processing Time (minutes)** check box and enter the maximum amount of time a scheduled purge may run (in minutes) in the associated field.

- To only purge folders that have been in Folder Maintenance for a specified amount of time, select the **Require Minimum Time in Trash (days)** check box and enter the minimum number of days that a folder must have resided in Folder Maintenance before it can be purged in the associated field.
 - To only purge folders from a certain Folder Type Group, select the **Restrict to Folder Type** check box and select the Folder Type from the associated drop-down.
3. When you are finished configuring the Purge Options, click **Apply**.

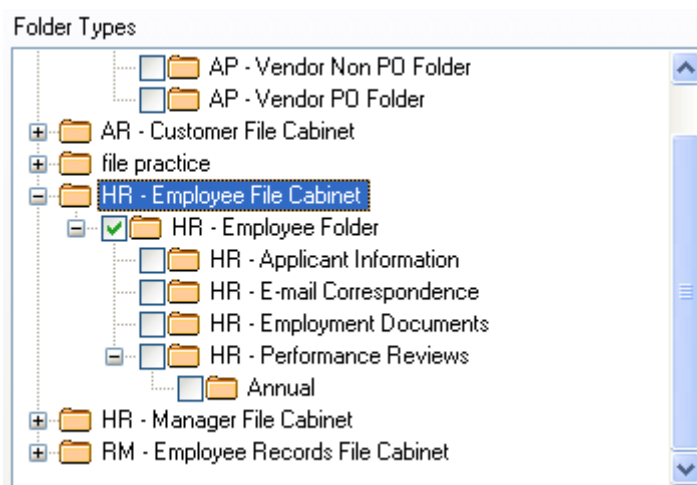
Specifying Delete Orphans Options

If you selected **Schedule Delete Orphans** from the Folder Maintenance right-click menu to schedule orphaned folders to be deleted:

1. After the Schedule Configuration options are configured on the **Schedule Configuration** tab, select the **Delete Orphans Options** tab from the **Schedule Management** window.



2. Select the **Folder Types** you'd like orphans to be deleted from by expanding the folder tree and selecting the appropriate check box(es).



If you select a parent folder but do not select any of its child folders, the scheduled process will only delete the parent folder's orphans and its child folders' orphans if all folders in its folder tree are empty.

For example, you select a parent folder called HR - Employee Folder. That folder's orphans and its children's orphans (such as folders designated for performance reviews, applicant information, and other employee documents) are only automatically deleted if all folders in the tree are completely empty.

Note: An orphaned folder is only eligible for deletion via Schedule Management if the folder is more than 24 hours old. The reason for this is you could potentially create new folders that do not yet contain documents only to have them deleted or purged by an existing scheduled process shortly thereafter.

3. From Folder Disposition, choose how you would like the orphaned folders to be processed:
 - **Send to Folder Maintenance** - Sends the deleted folders to Folder Maintenance for final review before purging.
 - **Purge Immediately** - Permanently removes the folders from OnBase immediately without sending them to Folder Maintenance.

Caution: If you select **Purge Immediately**, orphans and their children's orphans are removed permanently and cannot be retrieved from OnBase. Sending the orphans to Folder Maintenance is recommended because it allows you to review all deleted orphans and restore those that were deleted unintentionally.

4. To limit the amount of time that one process can run, select the **Limit Processing Time (minutes)** check box and enter the maximum amount of time a scheduled deletion may run (in minutes) in the associated field.

Viewing Scheduled Processes

All scheduled processes, including scheduled purges and orphan deletions, can be viewed in the **Schedule Management** window. To open the **Schedule Management** window:

- Right-click in the Folder Maintenance window and select **Schedule Purge**.
- Right-click in the Folder Maintenance window and select **Schedule Delete Orphans**.
- From the OnBase Client, click **Processing** | **Scheduler** | **Schedule Management**.

Note: Users without the Utilities product right will not be able to view folder purge/deletion scheduled processes from the **Schedule Management** window.

Modifying a Folder Purge/Deletion Scheduled Process

Once a scheduled process has been created, it can be modified as needed.

To modify an existing scheduled process:

1. Open the **Schedule Management** window in one of the following ways:
 - Right-click in the Folder Maintenance window and select **Schedule Purge**.
 - Right-click in the Folder Maintenance window and select **Schedule Delete Orphans**.
 - From the OnBase Client, click **Processing** | **Scheduler** | **Schedule Management**.

Note: Users without the Utilities product right will not be able to view folder purge/deletion scheduled processes from the **Schedule Management** window.

2. Select the process to be modified from the Scheduled Items box.

Tip: If you accessed the Processing Scheduling window from the Folder Maintenance window, a new scheduled process was automatically created. If you have no plans to create a new scheduled process, it should be removed.

3. Modify the settings on the **Schedule Configuration** and **Purge Options** or **Delete Orphans Options** tabs as needed.

For more information on the options on these tabs, see the Schedule Configuration, Purge Options, and Delete Orphans Options sections above.

4. Once you have finished modifying the scheduled process, click **Apply**.

Deleting a Scheduled Process

Scheduled processes can be deleted from the **Schedule Management** window.

1. Open the **Schedule Management** window in one of the following ways:
 - Right-click in the Folder Maintenance window and select **Schedule Purge**.
 - Right-click in the Folder Maintenance window and select **Schedule Delete Orphans**.
 - From the OnBase Client, click **Processing | Scheduler | Schedule Management**.

Note: Users without the **Utilities** product right will not be able to view folder purge/deletion scheduled processes from the **Schedule Management** window.

2. Select the scheduled process you would like to delete from the **Scheduled Items** dialog box and click **Remove**.

Tip: If you accessed the Processing Scheduling window from the Folder Maintenance window, a new scheduled process was automatically created. If you have no plans to create a new scheduled process, it should be removed.

3. Click **Apply**.

Running or Suspending a Scheduled Process





From the **Schedule Management** window, a scheduled process can be run immediately or it can be suspended.

1. Open the **Schedule Management** window in one of the following ways:
 - Right-click in the Folder Maintenance window and select **Schedule Purge**.
 - Right-click in the Folder Maintenance window and select **Schedule Delete Orphans**.
 - From the OnBase Client, click **Processing | Scheduler | Schedule Management**.

Note: Users without the **Utilities** product right will not be able to view folder purge/deletion scheduled processes from the **Schedule Management** window.

2. Select a scheduled process from the **Scheduled Items** dialog box.
 - To run the process immediately, click **Run Now**.
 - To suspend the process, click **Suspend**. To resume a suspended process, click **Resume**.

An icon is displayed next to each scheduled process in the **Scheduled Items** box that indicates its status.

Icon	Description
	Run Now - Indicates that the user has clicked the Run Now button to cause the process to execute immediately instead of waiting for its scheduled time to run.
	Suspend - Indicates a suspended process. The process will not run until a user selects it and clicks Resume .
	Active - Indicates an active scheduled process. An active process may be waiting to run or it may have already run at its scheduled time.
	Error - Indicates a process with a configuration error.

Tip: If you accessed the Processing Scheduling window from the Folder Maintenance window, a new scheduled process was automatically created. If you have no plans to create a new scheduled process, it should be removed.

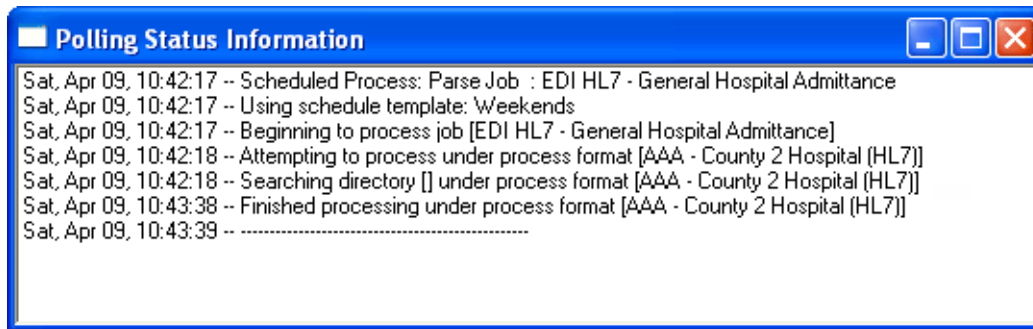
3. Click **Apply**.

Verifying the Scheduler is Running

To verify that the Scheduler is running on the processing workstation, click **Window | Polling Status Information** in the OnBase Client.

Note: The **-SCHED** or **-SCHEDINST** command line switch must be applied to the Client shortcut to use this option.

The **Polling Status Information** window is displayed. Information about scheduled processes is displayed in it as the process is run. If this window exists, the Scheduler is running.



Another way to verify the Scheduler is running is to select **Window | System Status**. Both **Process Server Mode** and **Scheduler Mode** will be displayed as **YES**.



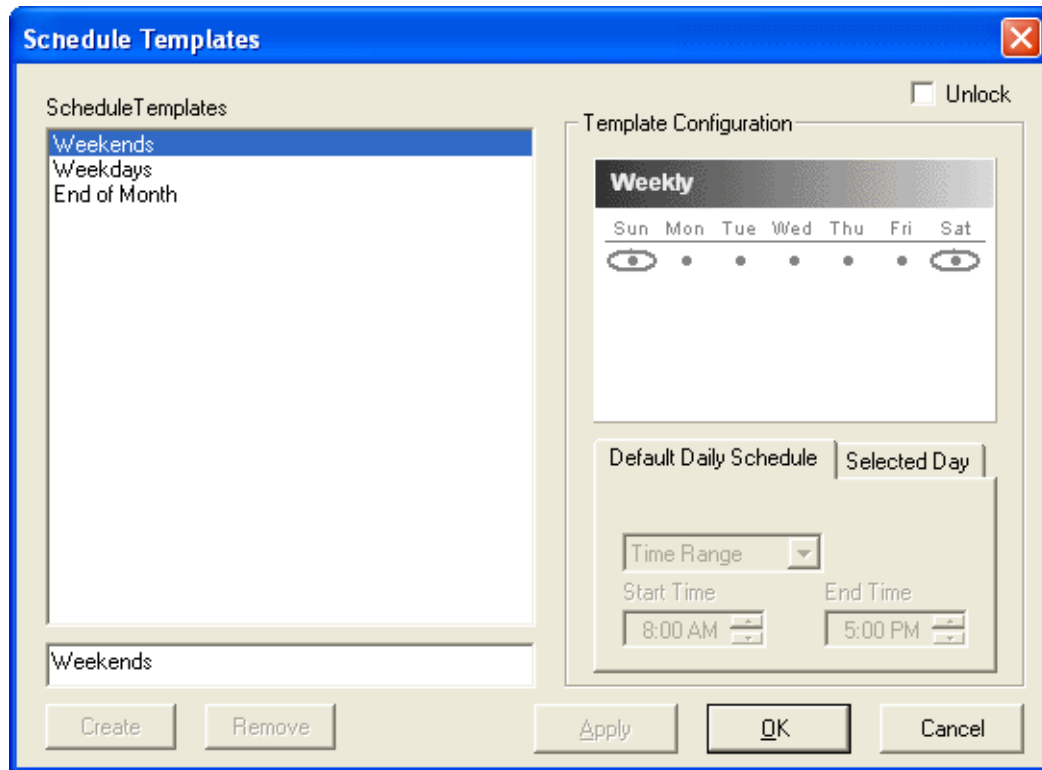
Creating Schedule Templates

A schedule template is used to create a processing schedule. These schedules can be used by multiple scheduled processes without having to be re-configured each time they are used.

Note: Any user with the Client and Client Scheduler product rights can create a schedule template. Once created, a schedule template is available to all users with Client and Client Scheduler product rights.

To create a schedule template:

1. From the OnBase Client, click **Processing | Scheduler | Schedule Templates**. The **Schedule Templates** window is displayed.



2. Enter a name for the new template and click **Create**.

Note: The maximum number of characters that can be used for a name is 80.

3. Configure the appropriate options. See the sub-sections below for more information on using the calendar, **Default Daily Schedule**, and **Selected Day** options under the **Template Configuration** area.
4. Once all Template Configuration options have been set, click **OK**.

To edit an existing template, select it from **Schedule Templates** list and select the **Unlock** check box. Once you have finished modifying it, click **OK**.

Calendar

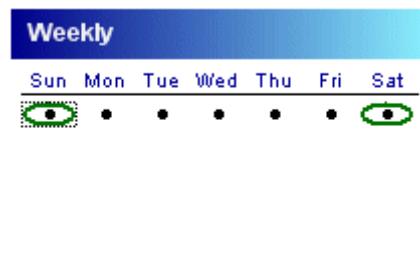
The calendar is used to select the day(s) on which a scheduled process should be run.

Note: The calendar is displayed based on your Workstation Regional Settings and the OnBase language DLL that you are using.

To change the view of the calendar, click the calendar heading (in the example above, **Weekly**) to display a menu. Select one of the following options to display a different calendar for configuration:

- **Weekly**. Allows you to configure a process to run on a certain day of the week (i.e., Thursday).
- **Monthly**. Allows you to configure a process to run monthly, on a particular date (i.e., the 1st and 15th of the month).
- **Monthly (Day-Relative)**. Allows you to configure a process to run on a relative day of the month (i.e., the first Saturday of the month, the 2nd Wednesday of the month).
- **Annual**. Allows you to configure a process to run on a certain day of the year (i.e., June 30).
- **Full Calendar**. Allows you to configure a process to run on specified days of specified years (e.g., August 10, 2011 and/or July 17, 2012).

To select days that you would like to run a scheduled process, double-click the day on the calendar. The selected day is circled.

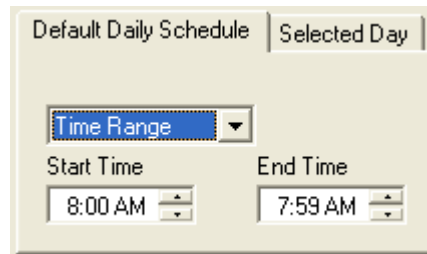


Note: In the example above, two days are selected but **Sunday** is the currently-selected day.

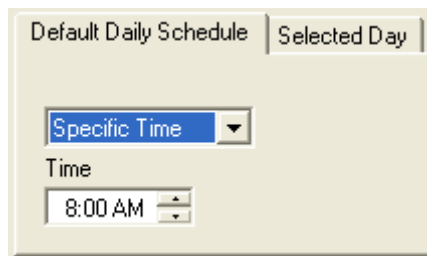
To deselect a day, double-click it.

Default Daily Schedule

The **Default Daily Schedule** tab allows you to configure the processing configuration for all days that do not have a **Selected Day** tab configuration.



The screenshot shows the 'Default Daily Schedule' tab selected. A dropdown menu is set to 'Time Range'. Below it, there are two time selection boxes: 'Start Time' set to '8:00 AM' and 'End Time' set to '7:59 AM'.



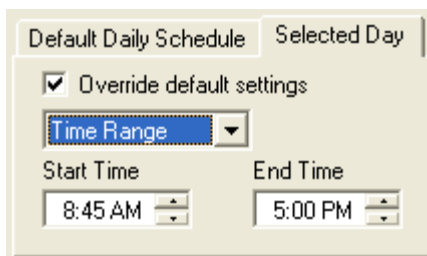
The screenshot shows the 'Default Daily Schedule' tab selected. A dropdown menu is set to 'Specific Time'. Below it, there is a single time selection box labeled 'Time' set to '8:00 AM'.

The drop-down list allows you to select **Time Range** or **Specific Time**. If you select **Time Range**, a **Start Time** box and an **End Time** box are displayed. Define the range of time in which you want your job or format to begin processing. If you select **Specific Time**, a **Time** box is displayed. Select the time at which you want the job or format to begin processing.

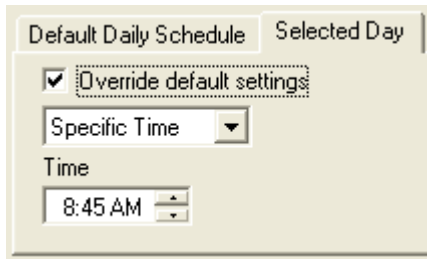
Tip: Specifying a **Time Range** and using the **Once Per Day** option will allow a scheduled process to run even if another process runs over its starting time, as long as the process is able to start within the specified range.

Selected Day

The **Selected Day** tab allows you to specify settings for the selected day that differ from the settings specified in the **Default Daily Schedule** tab. In order for the **Selected Day** tab to be enabled, you must click a day to select it and you must select the **Override default settings** check box.



The screenshot shows the 'Selected Day' tab selected. The 'Override default settings' checkbox is checked. A dropdown menu is set to 'Time Range'. Below it, there are two time selection boxes: 'Start Time' set to '8:45 AM' and 'End Time' set to '5:00 PM'.



The screenshot shows a dialog box titled 'Default Daily Schedule' with a 'Selected Day' tab. Inside, there is a checked checkbox labeled 'Override default settings'. Below this is a dropdown menu currently showing 'Specific Time'. Under the dropdown is a 'Time' label and a time selection field displaying '8:45 AM' with up and down arrows.

The drop-down list allows you to select **Time Range** or **Specific Time**. If you select **Time Range**, a **Start Time** box and an **End Time** box are displayed. Define the range of time in which you want your job or format to begin processing. If you select **Specific Time**, a **Time** box is displayed. Select the time at which you want the job or format to begin processing.

Tip: Specifying a **Time Range** and using the **Once Per Day** option will allow a scheduled process to run even if another process runs over its starting time, as long as the process is able to start within the specified range.

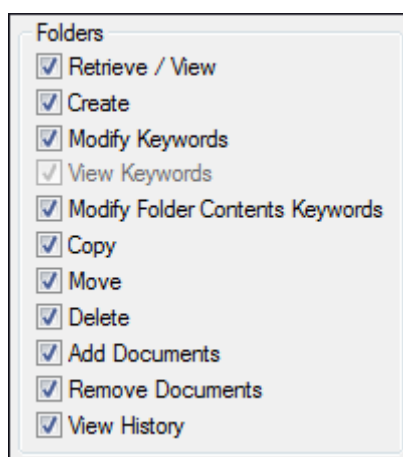
User Group Configuration for Folders

Users who work with OnBase folders must have sufficient folder privileges and rights to the corresponding Folder Types.

Assigning Folder Privileges

In User Group privilege configuration, you can specify the User Group's folder privileges. These privileges apply to all Folder Types the User Group has rights to access. To grant different privileges for each Folder Type, see [User Group Configuration for Folder Types on page 173](#).

1. In OnBase Configuration, select **Users | User Groups / Rights**.
2. Select the User Group and click **Privileges**. The **Assigning User Group Privileges** dialog box is displayed.
3. Under **Folders**, select the User Group's folder privileges.



Available privileges are described in the following table:

Folders	Description
Retrieve / View	Allows users to retrieve and view folders within the File Cabinets window.
Create	Allows users to create folders in a file cabinet. Note: If a user creates a document in an auto-folding Document Type, an auto-folder is created regardless of the user's privileges to create folders.
Modify Keywords	Allows users to view/add/modify/delete Keyword Values on folders.

Folders	Description
View Keywords	<p>Allows users to view Keyword Values on folders.</p> <hr/> <p>Note: This option is automatically selected if the Modify Keywords privilege is selected.</p> <hr/>
Modify Folder Contents Keywords	<p>Allows users to modify Keyword Values on child folders and documents using the Folder Contents Keywords right-click options. Users must also have the Modify Keywords privilege for the current folder to use Folder Contents Keywords options.</p> <p>This privilege allows users to modify Keyword Values on only the child folders and documents that the user has privileges to both view and modify Keyword Values on. If the user lacks either privilege on a child folder, then the user cannot modify Keyword Values on the child folder or its documents using the Folder Contents Keywords options. Similarly, if a user lacks privileges to view or modify Keyword Values on documents within a folder, then the user cannot modify Keyword Values on those documents using the Folder Contents Keywords options.</p>
Copy	Allows users to copy folders configured as copyable. No Keyword Values are updated on copied folders.
Move	<p>Allows users to move folders configured as movable.</p> <p>When a folder is moved, Keyword Values on the folder and its contents are updated according to the Keyword Value Update Rules for Moved Folders, which are available in the Folder Configuration help. To preserve accuracy, Keyword Values are updated regardless of a user's privileges to view and modify Keyword Values on the folder and its contents.</p>
Delete	Allows users to delete folders from a file cabinet and send them to Folder Maintenance.
Add Documents	Allows users to add documents to static and static/dynamic folders.
Remove Documents	<p>Allows users to remove documents statically residing in a folder.</p> <hr/> <p>Caution: Even without the Remove Documents folder privilege, users who have the Delete document privilege can send documents in folders to Document Maintenance.</p> <hr/>
View History	<p>Allows users to view all actions performed on individual folders. The Folder History window is accessible from the OnBase Client, Web Client, and Unity Client.</p> <hr/> <p>Caution: This privilege should be restricted if sensitive information about folders will be recorded.</p> <hr/>

4. Under **Client Features**, select **Folder Properties** to allow the User Group to view information about the folder. A folder's properties include its Folder Type, usage and content settings, and user who created the folder.

Note: Folder properties are unavailable in the OnBase Web Client. Folder properties are viewable only from the OnBase Client and Unity Client. For more differences between client applications, see [Folder Feature Support on page 175](#).

5. Click **Save**.

Assigning Product Rights for Folder Notes

The **Folder Notes** Product Right allows folder administrators to configure Folder Note Types in the OnBase Client. Only users who have this Product Right can configure Folder Note Types in the OnBase Client.

This Product Right is not required for users to view, create, edit, or delete folder notes. These privileges can be assigned by the user who configures Folder Note Types.

1. In OnBase Configuration, select **Users | User Groups / Rights**.
2. Select the User Group and click **Product Rights**.
3. Under **Administrative Privileges**, select **Folder Notes**.
4. Click **Save**.

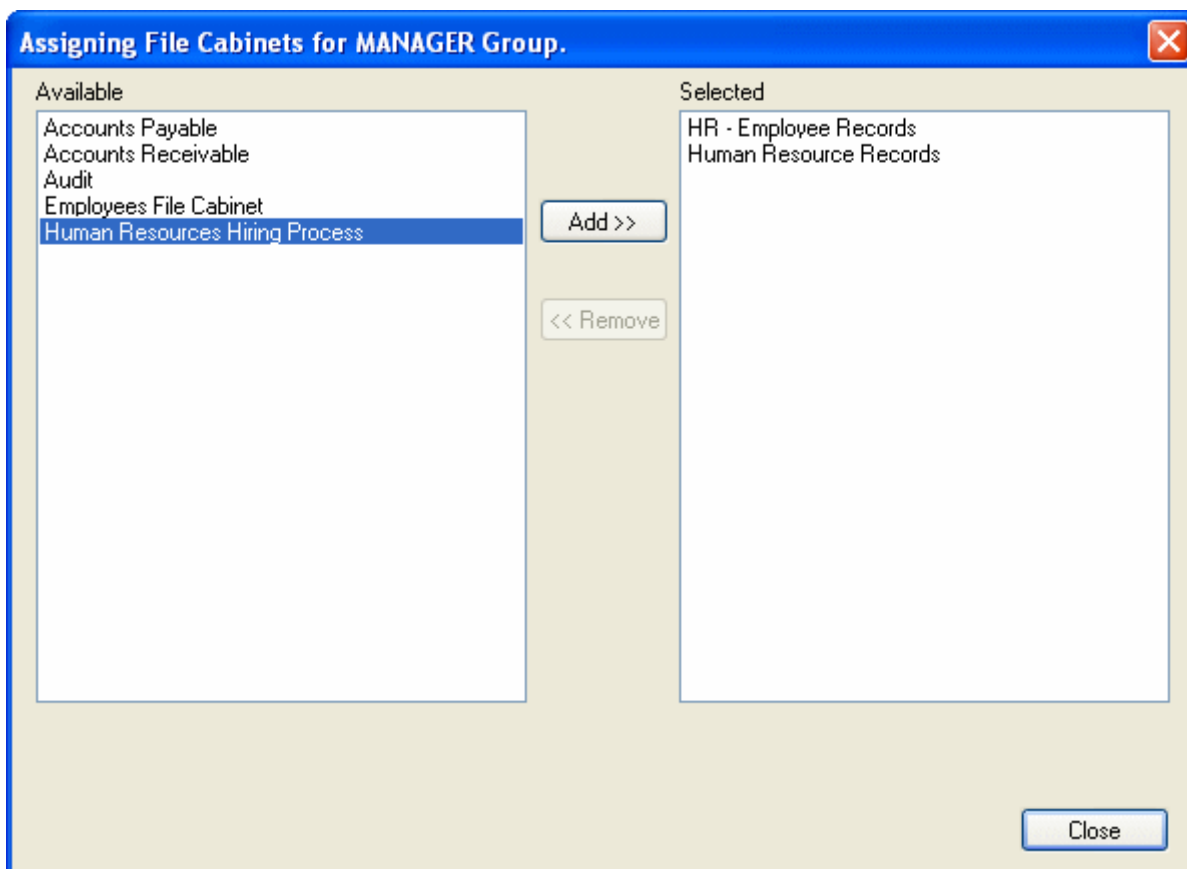
User Group Configuration for File Cabinets

Use the **Assigning File Cabinets** dialog box to grant User Groups access to file cabinets. Ensure the User Group also has access to the Folder Types on which the file cabinets are based; otherwise, the members cannot access folders in the file cabinet.

To assign file cabinet access:

1. In OnBase Configuration, select **Users | User Groups & Rights**.
2. Select the User Group.

3. Click **File Cabinets**. The **Assigning File Cabinets** dialog box is displayed.



4. Select the file cabinets to assign to the User Group.
5. Click **Add**.
6. Click **Close** to save changes and exit.

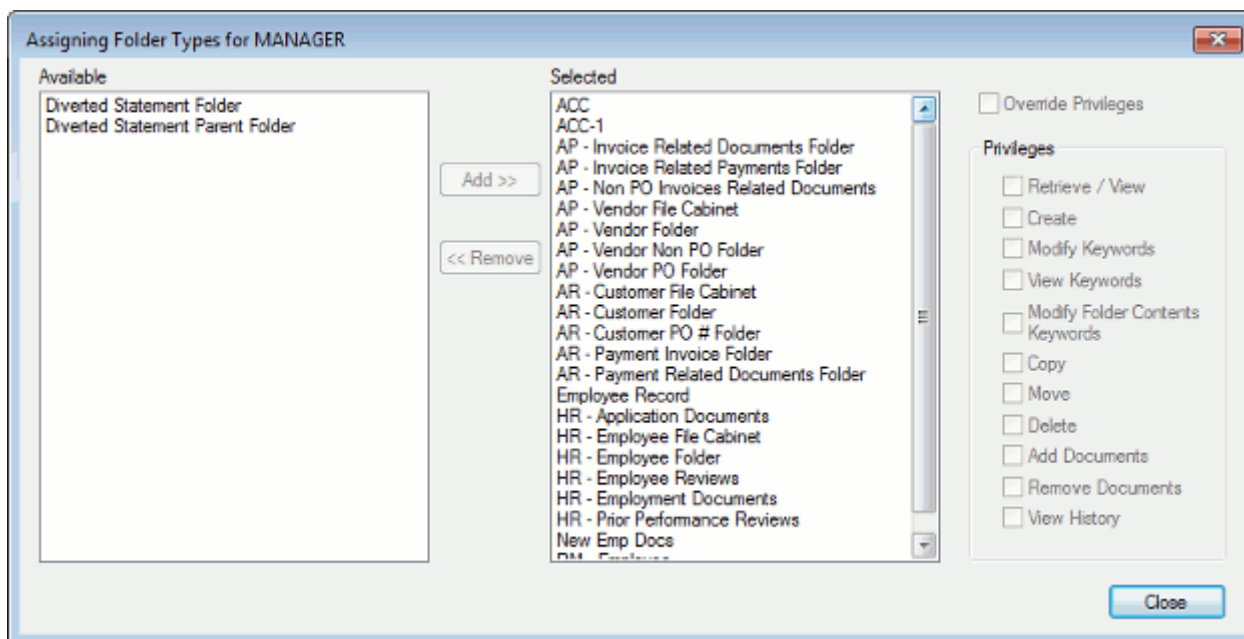
Note: Rights to folders within the file cabinet must be assigned individually at the **Assigning Folder Types** dialog box or through Folder Type configuration.

User Group Configuration for Folder Types

To grant User Group members access to Folder Types, use the **Assigning Folder Types** dialog box. Users can view folders based on their assigned Folder Types. If the folders have parent folders, users also must have access to the parent Folder Types and to the file cabinets where the folders reside.

Tip: Grant User Groups access to specific Folder Types through Folder Type configuration, where the relationships between parent and child Folder Types are represented graphically.

1. In OnBase Configuration, select **Users | User Groups / Rights**.
2. Select the User Group.
3. Click **Folder Types**. The **Assigning Folder Types** dialog box is displayed.
4. Select the Folder Types to assign to the User Group and click **Add**.



5. Apply override privileges as needed. Override privileges change the User Group's privileges for the selected Folder Type only.
 - a. From the **Selected** list, select the Folder Type(s).
 - b. Select **Override Privileges**. The **Privileges** section becomes available.
 - c. Grant or remove privileges as needed. For folder privilege information, see the section on assigning folder privileges in the Folders and File Cabinets documentation.

The default behavior of override privileges depends on the **Folder Type Permission Overrides** setting under Global Client Settings. See the section on Global Client Settings for folder override privileges in the Folders and File Cabinets documentation.

6. Click **Close** to save changes and exit.

Global Client Settings for Folder Override Privileges

From Global Client Settings in OnBase Configuration, you can specify how folder override privileges apply to users who belong to multiple User Groups with different levels of security.

1. In OnBase Configuration, select **Users | Global Client Settings**.
2. Click the **Security** tab.
3. Under **Folder Type Permission Overrides**, select one of the options described in the following table:

Folder Type Permission Overrides Options	Description
Least Restrictive	This option combines Folder Type overrides across multiple User Groups to allow for the least restrictive combination of privileges for a user.
Most Restrictive	This option combines Folder Type overrides across multiple User Groups to allow for the most restrictive combination of privileges for a user.

4. Click **Save**.

Folder Feature Support

Folder features are first implemented in the OnBase Client before being added to the Web Client and Unity Client. If your solution uses one of these clients, be aware that some folder features are not yet supported.

The following table shows feature availability in OnBase client applications. Available features are marked with an **X**. Unlisted features are available in all clients. Footnotes follow the table.

Folder Feature	OnBase Client	Unity Client	Web Client
"Characters Required to Run Query" configuration option	X	X	X
Colors and formatting tags in folder template text ^a	X	X	X
Copyable / movable folders	X	N/A	N/A
Custom Query folder retrieval	X	X	X
"Display Child Folders as Tabs" configuration option	X	X	X
Drag-and-drop document import and auto-indexing	X	X	N/A
"Folder Contents" right-click options	X	X	X
Folder filters	X	X	X
Folder History window	X	X	X
Folder notes ^b	X	X	X
Folder Properties dialog box	X	X	N/A
Folder Settings (Start of Week)	X	X	X
Folder Type icons	X	X	X

Folder Feature	OnBase Client	Unity Client	Web Client
"Order Child Folders By" configuration option	X	X	X
Related folders	X	X	X
Show folder locations	X	X	X ^c
Static text in pop-up list filter bar	X	X	N/A
Update non-Auto-Folder Keywords when Auto-Foldering	X	X	X

- a. Although color and formatting tags for folder templates aren't available in the Desktop or Java Web Client, folder templates are available in these clients.
- b. Folder notes can be viewed and created in the Unity Client and Web Client, but the Folder Note Types on which the notes are based cannot be configured there. Folder Note Types must be configured in either the OnBase Client or OnBase Configuration.
- c. The **Show Folder Locations** option is unavailable for E-Forms, OLE and HTML documents in the Web Client. It is available for image and text documents.

Upgrade Considerations

The following upgrade considerations have been compiled by OnBase subject matter experts. These upgrade considerations are general and applicable to most OnBase solutions and network environments and should be considered each time an upgrade is performed.

Carefully consider the impact of making any changes, including those listed below, prior to implementing them in a production environment.

For additional general information about upgrading OnBase, refer to the Upgrade Guidelines reference manual, and visit the Hyland Community at:
<https://www.hyland.com/community>.

Client Upgrade Considerations

The following information regarding Folders should be considered or noted prior to upgrading your version of OnBase.

Import/Export Considerations — The following should be considered with regard to importing and exporting:

- When importing and exporting in OnBase Configuration or Studio, ensure that all Folder settings are successfully applied (for example, auto-folding settings, Parent Folder Type Keyword Type settings, and File Cabinets are not carried over).

Troubleshooting

The following topics describe common issues with foldering and folder configuration.

- [Folder Differences Between Client Applications on page 178](#)
- [Duplicate Folders Are Created on page 178](#)
- [Dynamic Folders Do Not Contain Expected Documents on page 179](#)
- [Folders Make Browsers Unresponsive in the Web Client on page 179](#)
- [Cannot Restore Default Display for File Cabinets on page 179](#)
- [Cannot Select a Parent Folder on page 180](#)
- [Folder Configuration Tabs and Options Are Unavailable on page 180](#)
- [File Cabinets Window Display Is Not Saved on page 183](#)
- [Folder Template Color Tags Are Not Respected on page 184](#)
- [Documents Are Not Auto-Foldered on page 184](#)
- [User Has Insufficient Rights to a Parent Folder on page 185](#)
- [Folders Are Not Displayed in Pop-Up Lists on page 185](#)
- [Related Folders Cannot Be Found Due to Blank Keywords on page 186](#)
- [Unable to Complete the Folder Search in Unity on page 186](#)
- [Certificates of Destruction Are Not Displayed Properly on page 187](#)

Folder Differences Between Client Applications

Users who work in multiple client applications may notice differences in folder features and behavior. Many differences are due to the development process, which implements new features in the OnBase Client before adding them to the Unity Client and Web Client. For example, the ability to retrieve folders using Custom Queries exists only in the OnBase Client. This feature is pending development for other client applications.

For an outline of differences using folders between client applications, see [Folder Feature Support on page 175](#).

Duplicate Folders Are Created

Folders may appear to have duplicates because multiple folders have the same Auto-Name, even though the folders are unique based on Keyword or date range criteria. Ensure the Auto-Name strings on folders include Keyword values or date ranges that uniquely identify the folder.

For folders created as part of an auto-foldering process, check the auto-foldering configuration. There may be too many Keyword Types assigned either as required for auto-foldering or as common Keyword Types between a parent and child Folder Type. Auto-foldering uses each of the assigned Keyword Types to determine whether a folder already exists. If a document is archived with a unique value for any of the auto-foldering Keyword Types, a new folder is created.

Only Keyword Types required for a document to find or create the correct folder should be assigned for auto-folding.

See also [Keyword Considerations for Auto-Folding on page 54](#).

Dynamic Folders Do Not Contain Expected Documents

When Keyword Types are assigned to a dynamic Folder Type, the Keyword values on the folder are the search criteria used to retrieve documents and display those documents in the folder.

If a dynamic folder has values for only some of these Keyword Types, then OnBase retrieves documents based only on those folder Keyword Types that have values. When a Keyword value is missing on a folder or a document, the folder may not display the desired documents. Likewise, if the assigned Keyword Types do not provide unique search criteria, a folder may display unwanted documents.

If a dynamic folder does not display the desired documents, check the folder Keyword Types being used to retrieve and display documents. As a best practice, assign the fewest number of retrieval Keyword Types necessary. Also verify the Keyword values on both the folder and the documents being displayed (or omitted). After accounting for missing values and making any necessary changes to the Keyword Types, test the dynamic folder to verify the expected documents are displayed.

Folders Make Browsers Unresponsive in the Web Client

In the OnBase Web Client, opening or searching a file cabinet containing a large number of folders may cause Internet Explorer to become unresponsive. The recommended child folder display option for a file cabinet or Folder Type containing a large number of folders is **Only Display Child Folders from Search**. When users select the file cabinet or folder, they will be prompted to search for folders by Folder Type and Keyword values.

Displaying child folders from folder search can greatly improve folder retrieval time, provided that users know information about the folder they are searching for, such as Folder Type and Keyword values.

For more information about child folder display options, see [Child Folder Display Options on page 41](#).

Cannot Restore Default Display for File Cabinets

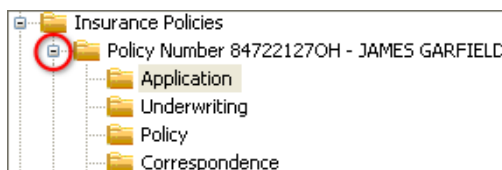
OnBase Client users may be unable to access the **Restore Default Display** option if they close all panes in the advanced File Cabinets window. To restore the default display, users should close the advanced File Cabinets window and then re-open it. The window is then automatically restored to its default display.

Cannot Select a Parent Folder

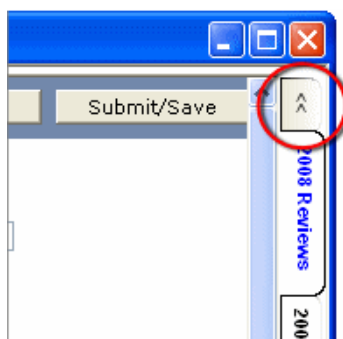
Users may be unable to select a parent folder if it is configured to display child folders as tabs. When the parent folder is selected, the first child folder tab is automatically displayed. As a result, users cannot access right-click actions on the parent folder.

To select the parent folder when child folders are displayed as tabs, users should do the following:

- Collapse the parent folder by clicking the - symbol to the left of its name.



- If applicable, click the up-level tab located above the child folders' tabs. In the OnBase Client, this tab is available when both the current folder and the parent folder are displayed as tabs.



The up-level tab is available for any tabbed folder in the OnBase Web Client, allowing users to access right-click options for child folders displayed as tabs.

Folder Configuration Tabs and Options Are Unavailable

When you configure a Folder Type, some configuration options and tabs may be unavailable, or grayed out. The availability of an option or tab is determined by the configuration options currently applied as well as your system's licensing. The following topics describe the conditions that determine whether an option is available.

Note: More options may be available depending on your system's licensing. The following topics describe options that are displayed without additional licensing.

Settings Tab

The following table describes conditions affecting the availability of options on the **Settings** tab.

Option	Availability
Usage	<p>All Usage options are unavailable if any of the following conditions are met:</p> <ul style="list-style-type: none"> • The Folder Type is in use. The Folder Type is considered in use if either a folder or file cabinet based on the Folder Type exists, or if the Folder Type has a Work Folder assigned within Workflow. • The Folder Type has child Folder Types. Only Client Folder Types can have child Folder Types. • Auto-folding is configured for the Folder Type. <p>Workflow is unavailable if any of the following conditions are met:</p> <ul style="list-style-type: none"> • The Folder Type is a child Folder Type. Workflow Folder Types must be top-level Folder Types without any child Folder Types. • Your system is not licensed for Workflow.
Contents	<p>When Folders Only is selected, Static Documents, Dynamic Document Types, and Dynamic Document Type Groups are unavailable. Folder Types configured to contain folders only cannot contain documents at their root level.</p> <p>When either Static Documents or Dynamic Document Types is selected, Dynamic Document Type Groups is unavailable.</p> <p>When Dynamic Document Type Groups is selected, Static Documents and Dynamic Document Types are unavailable.</p> <p>For Workflow Folder Types, only Dynamic content options are available. Work folders' contents must be Dynamic.</p>
Folder Date Ranges	Folder Date Ranges options are unavailable if a file cabinet is based on the Folder Type or if the Folder Type is configured for Workflow.
User Options	These options are unavailable for Workflow Folder Types.
Child Folder Manual Add Options	<p>These options are available for Client Folder Types only.</p> <p>The Any User Addable Folder Type option is unavailable if either Keyword Value Ascending or Keyword Value Descending is selected under Order Child Folders By on the Display tab.</p>
Auto-Create Options	<p>Only Auto-Create Child Folders is available for top-level Folder Types. This is the only available option if Auto-Create Child Folders is not selected on the parent Folder Type.</p> <p>All Auto-Create Options are unavailable for Workflow Folder Types.</p>

Option	Availability
Folder Notes	This option is unavailable for Workflow Folder Types.

Auto-Name Tab

The tab is unavailable for Workflow Folder Types.

Display Tab

The following table describes conditions affecting the availability of options on the **Display** tab.

Option	Availability
Folder Contents Display Options	<p>The Include Child Folder Static Contents option is only available for Folder Types configured to contain Folders Only or Static Documents. This option is unavailable for Workflow Folder Types.</p> <p>The Do Not Automatically Display First Document option is unavailable for Folder Types configured to contain Folders Only, unless the Include Child Folder Static Contents option is checked.</p>
Icons	These options are available for Client Folder Types only.
Order Documents By Options	These options are unavailable for Folder Types configured to contain Folders Only.
Order Child Folders By Options	<p>These options are available for Client Folder Types only.</p> <p>The Sequence button is available only if Folder Type Sequence is selected.</p> <p>The Keyword Value Ascending and Keyword Value Descending options are unavailable if the Any User Addable Folder Type option is selected under Child Folder Manual Add Options on the Settings tab.</p> <p>The drop-down list is available only if Keyword Value Ascending or Keyword Value Descending is selected.</p>
Child Folder Display Options	<p>These options are available for Client Folder Types only.</p> <p>The Characters Required to Run Query field is available only if Display Child Folders in a Pop-up List is selected.</p>
Folder Tabs	<p>These options are unavailable for Workflow Folder Types.</p> <p>The options are available only if Display Child Folders as Tabs is selected on the parent Folder Type.</p>

Parent Type Tab

This tab is unavailable for Workflow Folder Types. Workflow Folder Types must be top-level Folder Types and cannot have any child Folder Types.

This tab is unavailable if there is a file cabinet based on the Folder Type.

Related Types Tab

This tab is unavailable for Workflow Folder Types.

Auto-Folder Tab

The tab is unavailable if any of the following conditions are met:

- The Folder Type is configured for Workflow.
- The Folder Type is configured to contain folders only.
- The Folder Type is a top-level Folder Type.
- The top-level Folder Type in the current structure is not assigned a file cabinet.
- Common parent Keyword Types are assigned between the top-level Folder Type and the immediate child Folder Type. This configuration could result in a file cabinet being created through auto-folding. As a best practice, do not assign Keyword Types to the top-level Folder Type.

Dynamic Tab

The tab is available for dynamic Folder Types only.

Folder Type Cannot Be Deleted

When you attempt to delete a Folder Type from OnBase Configuration, the following error message may be displayed:

- This folder type cannot be deleted because there exists a folder of type "[Folder Name]."

This message indicates that at least one folder of this Folder Type exists inside the OnBase Client (not Configuration). All folders of this Folder Type must be deleted and purged from OnBase prior to the Folder Type's deletion from OnBase Configuration.

Once you have purged all folders of the Folder Type from the OnBase Client, then you can delete the Folder Type from OnBase Configuration.

For information about deleting folders using OnBase Configuration, see [Deleting Existing and Orphaned Folders in the Client on page 114](#). For information about purging folders using the OnBase Client, see [Folder Maintenance on page 151](#).

File Cabinets Window Display Is Not Saved

In the OnBase Client, users can customize the advanced File Cabinets window by moving, floating, closing, and unpinning its panes. These changes are preserved between sessions, allowing users to return to the same arrangement of panes the next time they log on.

If users close either the **Folder Tree** or **Documents** pane, then the File Cabinets window reverts to its default display the next time it is opened. This behavior occurs because the **Folder Tree** and **Documents** panes are integral to folder usability, and they must be displayed to allow users to work with folders effectively.

Note: This functionality applies only to the advanced File Cabinets window. The classic File Cabinets window does not preserve users' changes.

Folder Template Color Tags Are Not Respected

The **Text for Missing Item** field in folder template configuration can contain formatting tags to make the missing item text stand out. This formatting is supported only in the OnBase Client, Web Client, and Unity Client. The other client applications do not support formatting.

Tip: To make the missing item text stand out in applications that don't support formatting tags, add two or three periods to the front of the text. For example, type **..Missing I-9**. The missing item text then appears indented from the documents that are present.

Documents Are Not Auto-Foldered

Documents configured for auto-foldering are not auto-foldered under certain conditions, as described in the following topics.

The Destination Folder is Locked

If a user imports a document into a Document Type configured for auto-foldering, but the destination folder is locked, then the document is imported but not auto-foldered. A destination folder may be locked because a user is viewing its Keyword values or because another process is modifying the folder.

If the Document Type is configured to dynamically populate the folder, the document is dynamically displayed in the folder the next time the folder is opened or refreshed. If the folder is static, then the document can be manually added to the folder, or you can auto-folder the document using the **Auto-Folder Existing Documents** button in the **Auto-Folder Configuration** dialog box. For more information, see [Auto-Folder Existing Documents on page 137](#).

User Has Insufficient Rights to a Parent Folder

When a user tries to open a folder retrieved through folder search, the following error may be displayed:

- You have insufficient rights to access one of the parent folders of the selected folder.

This message indicates that the user lacks privileges to a parent folder. To access a folder, a user must have privileges to each parent folder in the hierarchy and to the file cabinet containing the folder. Use the **Folder Type** dialog box in OnBase Configuration to assign the user privileges to each Folder Type in the folder structure. Ensure the user also has privileges to the file cabinet based on the top-level Folder Type.

To access the **Folder Type** dialog box, select **Document | Folder Types** within OnBase Configuration.

Folders Are Not Displayed in Pop-Up Lists

Some folder pop-up list behaviors may confuse users. These behaviors and their causes are described in the following topics.

Characters Required to Run Query

A pop-up list may appear empty when it initially is displayed. This indicates that either no folders exist in the selected parent, or the administrator has set up the **Characters Required to Run Query** option. This option requires users to enter a minimum number of characters in the pop-up list's filter bar before the matching folders are displayed. For more information about this option, see [Display Child Folders in a Pop-up List on page 43](#).

Oracle and Case Sensitivity

Users may have trouble with folder pop-up lists in Oracle databases. When users enter text into the pop-up list filter bar, all folders are filtered out, and it appears that the matching folders do not exist. This behavior may occur when folder Auto-Names contain lowercase characters. Folders with mixed-case Auto-Names are filtered out when uppercase text is entered into the pop-up list's filter bar. This behavior occurs in all OnBase client applications, though the exact symptoms vary per application.

This behavior occurs because Oracle databases are case-sensitive, and the folder pop-up list forces users to enter letters in uppercase. If you are using an Oracle database, then you must capitalize all letters in the Auto-Names of folders retrieved using a pop-up list.

Note: In the Web Client and Unity Client, the folder pop-up list accepts mixed-case characters. However, users must enter characters in the same case as the characters in the folder names.

Style and Formatting Tags

Users may have trouble filtering a pop-up list containing folders with formatted auto-names. For example, suppose a Folder Type's Auto-Name string is **Records for <BLUE>[Employee Name]**, and a user is looking for the **Record for Jane Harper** folder. When the user begins to type **Jane**, no matching folders are returned, even though this folder does exist.

This behavior occurs because the user must type out the formatting tags in the correct location within the folder Auto-Name. For example, to retrieve the **Record for Jane Harper** folder, the user must first type **<BLUE>** before typing **Jane Harper**.

If Folder Type Auto-Name strings in your system contain formatted text, consider displaying them using a method other than **Display Child Folders in a Pop-up List**.

Related Folders Cannot Be Found Due to Blank Keywords

In the OnBase Client, when a user attempts to retrieve related folders by right-clicking a folder and selecting **Related Folders**, the following message may be displayed:

- Cannot find Related Folders for '<Folder Name>'. The keywords used to relate folders are blank.

This message indicates OnBase cannot retrieve related folders for the selected folder, because the selected folder has blank or empty Keyword Values.

When related folders are configured in OnBase Configuration, specific Keyword Types are chosen to link related Folder Types to the current Folder Type. If all of these Keyword Types are missing values on a selected folder in the OnBase Client, then users cannot retrieve related folders from the selected folder. To allow users to retrieve related folders, ensure the selected folder is properly indexed.

For more information about related folders, see [Related Folder Type Configuration on page 70](#).

Unable to Complete the Folder Search in Unity

When Unity Client users attempt to retrieve folders using a pop-up folder search, the following error may be displayed:

- Unable to complete the folder search.

This error occurs when a user with rights to **Override Query Restrictions** tries to search for child folders without entering a required Keyword Value in the pop-up **Find Folder** dialog box. This behavior affects only folder searches that are initiated by opening a folder configured to display child folders from search. It does not affect folder searches that are initiated by clicking the **Find** button on the **Folder** tab.

To execute the folder search in the Unity Client, the user must enter the required Keyword Values.

Certificates of Destruction Are Not Displayed Properly

If the configured Default Font does not support Unicode characters, those characters may be displayed improperly on Certificate of Destruction documents. To properly display Unicode characters on Certificate of Destruction documents, do one of the following:

- Configure the Default Font as a font that supports Unicode characters by selecting **Documents | Named Fonts** in the Configuration module. For more information, see the **System Administration** module reference guide.
- Configure the Document Type's **View / Print** options to use a font that supports Unicode characters by selecting **Documents | Document Types** in the Configuration module. For more information, see the **System Administration** module reference guide.

The following best practice recommendations were assembled by a team of OnBase subject matter experts. They represent the accumulation of years of experience installing and configuring OnBase solutions.

The following recommendations are general in nature, and are applicable to most OnBase solutions and network environments. Depending on your solution design and your organization's needs, not all of the best practice recommendations listed below may apply to, or be recommended for, your OnBase solution.

Carefully consider the impact of making any changes, including those listed below, to your OnBase solution prior to implementing them in a production environment.

The following best practices apply to configuring and using folders in OnBase. These guidelines are intended to help you design a folder solution that both achieves your goals and facilitates maintenance. If you are new to OnBase folders, see the following [Definitions](#) section for an introduction to terms common to folders.

- [Getting Started on page 189](#)
- [Assigning Folder Content Options on page 191](#)
- [Organizing Folders and Contents by Keywords on page 191](#)
- [Naming Folders Logically on page 193](#)
- [Choosing Folder Display Options on page 194](#)
- [Creating Folders Automatically Using Auto-Foldering on page 195](#)
- [Deleting Unnecessary and Empty Folders on page 196](#)
- [Client Usage on page 197](#)

Definitions

The following are brief definitions of foldering terms used throughout this guide. For more comprehensive information about each term, see the Exposure chapter in the Folders module reference guide or help files.

auto-create — To automatically create a folder's child folder structure when the folder is created. One of each type of child folder is created.

auto-folder — To automatically create a folder and its parent folders when a document that belongs in that folder is imported or re-indexed. OnBase uses indexing information from the document to determine whether a folder already exists for that document. If none exists, a new folder is created.

dynamic folder — A folder that retrieves its contents dynamically based on Document Type and keyword criteria.

file cabinet — The container for all folders within a folder hierarchy.

folder — The client-side container used to organize documents and other folders. Each folder is based on a Folder Type, which defines the folder's configuration settings. A single document can reside in multiple folders. If the document is modified, changes are reflected in each folder.

Folder Type — The configuration model on which folders are based. Folder Types define the configuration settings that control the folder's position in a folder hierarchy, the Keyword Types assigned to the folder, and how the folder behaves in client applications.

static folder — A folder whose contents are not controlled by keyword criteria. Documents are added to static folders either manually or through auto-folding. Documents are removed from static folders either manually or through document deletion.

Getting Started

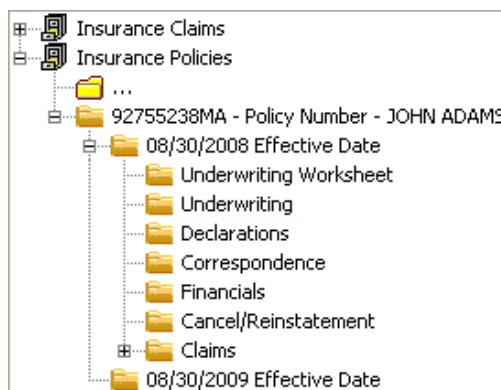
Read these guidelines before configuring OnBase folders.

1. Always design a folder hierarchy on paper before working in OnBase Configuration. When designing your folder structure, think of the folders in terms of the keywords they will use. Keywords are used to categorize, index, and auto-folder documents and to link documents to folders.

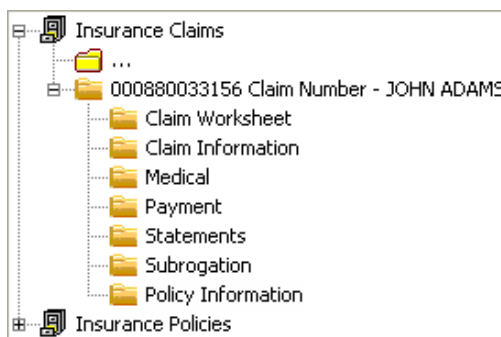
Tip: Use the folder configuration worksheets at the end of the Folders module reference guide to help you plan a folder hierarchy.

2. When setting up a Folder Type for auto-folding, configure auto-folding for as few Document Types as required by your business processes. To do this, identify the first document that enters OnBase as the "trigger" document to create the dynamic folder through auto-folding. Allow the related documents to appear in the folder dynamically rather than setting up auto-folding for each Document Type. Once a trigger document creates a folder, the folder dynamically displays all the documents that satisfy its dynamic criteria.
3. Designate an administrative super-user other than MANAGER who can access all Folder Types for maintenance purposes. A super-user is helpful for troubleshooting folder configuration issues. For example, if a user tries deleting a parent folder but lacks rights to a child folder, the user won't be able to delete the parent folder and won't know that there are child folders underneath. The super-user would be able to see the child folders and identify the issue.
4. Consider folder naming conventions carefully. The names of Folder Types in Configuration are also used in the folder search interface that allows users to find specific folders. Choose a naming convention that makes sense for the user. For suggested naming conventions, see [Naming Folders Logically on page 193](#).

5. Design multiple file cabinets to accommodate the different ways users access documents. There is no need to create a “one size fits all” configuration—a single document can exist in multiple folders simultaneously, and a change made to the document in one folder is reflected in all folders. If different users access the same documents for different business processes, set up additional structures for displaying folders by creating separate file cabinets, Folder Types, and hierarchy structures.
 - For example, in an insurance scenario, a user working in underwriting might retrieve a customer’s account folder to access the customer’s policies and view any claims. The following folder structure would accommodate this retrieval method:



- In the same example, a user working primarily on insurance claims might access policy documents by looking up the claim number and drilling down to the customer’s policy and account documents. The following folder structure would be more appropriate for this user:



6. Use AutoFill Keyword Sets and Data Sets as much as possible to increase accuracy and reduce the risk of input errors. These features are especially helpful when Keyword Types are used for auto-folding.

When auto-folding is used, misindexed documents will create misindexed folders. When the documents are later re-indexed to correct the mistake, the properly indexed folder structure is created, but the original folder structure still exists.

Assigning Folder Content Options

Folder content options control whether documents reside statically or dynamically in folders. A static folder contains static links to the documents, so changes to folder Keyword Values won't change the documents appearing in the folder. A dynamic folder is automatically populated by searching for documents that satisfy the folder's criteria each time it is opened.

1. Use dynamic folders whenever possible. Static folders should be used only when a business need requires documents to reside in a folder statically or when the Records Management module is being used to create managed folders.
2. Avoid configuring Folder Types as both static and dynamic, unless a business need requires it. Some static/dynamic folder behaviors may confuse users. For example, if a user manually adds a document that already resides in a folder dynamically, the document is listed twice in the folder (once for the dynamic relationship and once for the static relationship).

A case that justifies using static/dynamic folders is when a folder contains a piece of correspondence that doesn't match any of the folder's Keyword Types, which are used to dynamically populate the folder with other documents.

3. A folder can contain both documents and subfolders at its root. If documents will reside only in the folder's subfolders (child folders), configure the folder's contents as **Folders Only**. Configure a folder to contain **Folders and Documents** only if the documents will reside directly within that folder (rather than only in its subfolders).

Organizing Folders and Contents by Keywords

Keywords are a major part of any folder system and should be chosen selectively for their intended functions. Follow these guidelines when assigning Keyword Types to Folder Types.

1. Assign as few Keyword Types as necessary. When assigning a Keyword Type to a Folder Type, you should be able to justify what it is used for. In foldering, Keyword Types can be used for the following functions:
 - Searching
 - Dynamic foldering
 - Auto-foldering
 - Naming folders (using Auto-Name strings)
 - Providing default values for drag-and-drop document indexing
 - Restricting access to folders (using Security Keywords)
2. Be careful about assigning Security Keywords to folders. When a user browses a folder hierarchy, OnBase dynamically determines which folders and documents the user is allowed to view. Security Keywords could slow down this process.
3. Don't configure any Keyword Types, Auto-Name strings, or parent Folder Types for file cabinet Folder Types. Keyword Types serve no purpose on file cabinets because users won't retrieve file cabinets using keyword searches. Auto-Name strings are also unnecessary because they are overridden by the file cabinet's name. No parent should be assigned to a file cabinet Folder Type, because file cabinets are at the top level of the folder tree.

4. Set at least one Keyword Type as required for searching using the **Retrieval** check box in the Folder Type's Keyword Type Options. Enabling this setting prevents users from performing unrestricted folder queries, which can adversely affect system performance.
5. When configuring a Folder Type's dynamic or auto-folding properties, use Keyword Types whose values won't change. Values for Keyword Types like **Name** and **Address** could change, whereas values for Keyword Types like **SSN**, **ID**, and **Account Number** are likely to remain the same.
6. If a Folder Type is assigned a Multi-Instance Keyword Type Group, and Keyword Types in the group are used to dynamically populate folders with documents, then the Document Type(s) assigned to the folder must be assigned the same Multi-Instance Keyword Type Group. This configuration is required for dynamic folders to respect the grouping of assigned Keyword Types.

Keyword Assignment Examples

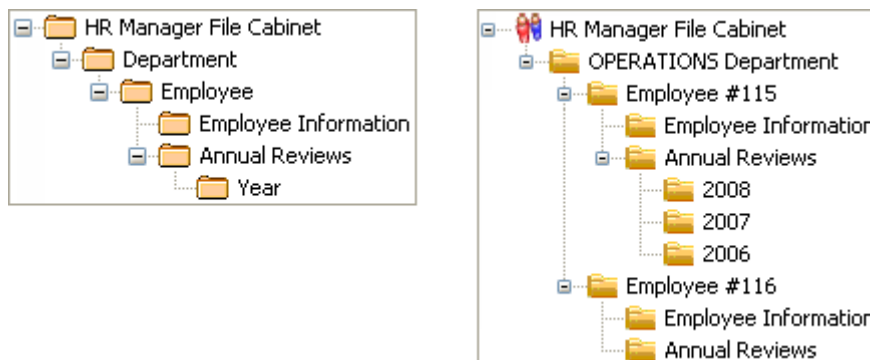
In a typical folder structure, the number of Keyword Types assigned to each Folder Type increases as you go deeper into the folder tree. The following Human Resources folder structure provides an example of this practice. The illustration on the left shows the Folder Types as they appear in OnBase Configuration. The illustration on the right shows the resulting folders in the OnBase Client.



Keyword requirements for this configuration are described in the following table. Additional Keyword Types may be needed to facilitate folder searches or to index documents using drag-and-drop indexing.

Folder Type	Keyword Type Configuration
HR Manager File Cabinet	No Keyword Types are assigned to the file cabinet's Folder Type.
Department	Only the Department Keyword Type is required for both the Auto-Name and for creating links with child folders.
Employee	<p>The Employee Folder Type requires two Keyword Types: Department and Employee ID.</p> <ul style="list-style-type: none"> The Department Keyword Type is required to create the link to the Department Folder Type. The Employee ID Keyword Type is required to uniquely identify each Employee folder. <p>Additional Keyword Types may be necessary to display the employee's name in the folder Auto-Name.</p>

The number of Keyword Types does not always increase further down the folder tree. Consider the following example, where the **Employee** Folder Type is broken down into **Employee Information** and **Annual Reviews**, and reviews are further organized by **Year**.



The illustration on the left shows the expanded Folder Type structure in OnBase Configuration. The illustration on the right shows the resulting folders in the OnBase Client.

In this scenario, the new Folder Types could have fewer Keyword Types than their parents, as described in the following table:

Folder Type	Keyword Type Configuration
Employee Information Annual Reviews	Both Folder Types require only the Employee ID Keyword Type, which links them to the Employee Folder Type. No additional Keyword Types are required because the Auto-Names don't need to display any Keyword values.
Year	The Year Folder Type requires only the Employee ID Keyword Type to create a link with its parent, Annual Reviews . Because this is a date-based Folder Type, no Keyword Types are needed to categorize folders by year. The Auto-Name displays the year by using the Folder Period Auto-Name variable (%D5).

Naming Folders Logically

Folder Type names and Auto-Name strings should be consistent and logical to help users and administrators identify Folder Types in both OnBase Configuration and the OnBase Client.

1. Name a file cabinet and its corresponding Folder Type similarly to reflect their relationship. These names should also indicate the file cabinet's contents.
2. When naming Folder Types for folders, choose names that reflect the types of documents the folders will contain. Use a prefix or another convention to indicate that the Folder Type is for a folder rather than a file cabinet.

3. If you use a prefix, consider whether users will search for folders or use folder pop-up lists. If folders are displayed in a pop-up list that has a minimum character restriction, the users must enter the first few characters of the folder's name before the pop-up list is populated.

Choosing Folder Display Options

Folder display options affect both how users find the folders they need and how quickly folders are retrieved. OnBase provides four display options for folders. These options allow you to choose the best way to display folders as required by business practices.

1. The recommended child folder display option for file cabinets or Folder Types containing thousands of folders is **Only Display Child Folders from Search**. This option improves folder retrieval time, provided users know the type of folder they're looking for and how it is indexed.
2. Use the **Do Not Automatically Display First Document** display option for folders containing documents that take a while to display, such as large PDFs or CAD drawings. This option prevents the first document in the folder from being automatically displayed in the viewer.
3. Use the **Display Child Folders as Tabs** child folder display option only for Folder Types configured to contain folders only. Because the first child folder tab is displayed automatically when the parent folder is opened, any documents residing in the parent folder's root (i.e., not in its child folders) are more difficult to access. Users can still access the documents in the parent folder, but the steps to do so may not be obvious.
4. Avoid using light or dark colors for child folder tabs. If tab colors are too light or too dark, there may not be enough contrast between the tab name and the tab background, making the tab name difficult to read.

Creating Folders Automatically Using Auto-Foldering

OnBase auto-foldering creates folders and their parent folders automatically as documents are imported. When a document is imported, OnBase uses its indexing information to check whether a folder exists for that document. If no matching folders exists, then OnBase automatically creates the folder and any necessary parent folders. If the folder is static, the document is added to the folder. A thorough understanding of auto-foldering will help you both design the best configuration for your solution and avoid common mistakes that produce unintended results.

Choosing Auto-Folder Keywords

Assign the Keyword Types required for auto-foldering carefully. Not all Keyword Types that are assigned to a Folder Type may be needed for auto-foldering.

1. When assigning Keyword Types that are required for auto-foldering, choose only those required to uniquely identify the folder. When multiple Keyword Types are assigned as required for auto-foldering, OnBase checks the value on each Keyword Type to determine whether a folder already exists for a document. If any of the Keyword values differs, a new folder is created.
In an insurance example, suppose the **Claim** Folder Type is the child of the **Policy** Folder Type, and the **Claim** Folder Type is configured for auto-foldering. Both the **Policy #** and **Claim #** Keyword Types are configured as required for auto-foldering so that the resulting **Claim** folders can be created in the correct **Policy** folders. The **Policy #** is also used as a common parent Keyword Type to link the **Claim** Folder Type and the **Policy** Folder Type.
2. If a Multi-Instance Keyword Type Group is assigned to the Folder Type, then assign the same Multi-Instance Keyword Type Group to the Document Type. Never assign different Multi-Instance Keyword Type Groups to the Folder Type and Document Type.
3. On Document Types that are being auto-folded, configure the auto-folder Keyword Types as **required for new documents** (using the **REQN** check box in the Document Type's Keyword Type Options). This setup forces users to provide values for the Keyword Types used for auto-foldering, ensuring that new documents are auto-folded upon import. If Keyword Types are not configured as required for new documents, then users can leave those Keyword Types blank, preventing the documents from being auto-folded.

Using Auto-Foldering and Auto-Creation

OnBase provides two methods for creating folders automatically: auto-foldering and auto-creation. Auto-foldering automatically creates a folder and all of its parent folders when a document is imported. Auto-creation automatically creates a folder's child folders when the parent folder is created, even if child folders' documents don't reside in OnBase yet.

1. Choose the method of folder creation that best suits your business practices. Use auto-creation if folders should be created before documents are imported and each folder should contain the same subset of child folders. Keep in mind that empty auto-created folders may confuse users who expect the folders to contain documents. If child folders should be created only when they will contain at least one document, use auto-foldering.
2. Use auto-foldering rather than auto-creation to create date-based folders. If auto-creation is used, the date range on auto-created, date-based folders will reflect either the parent folder's date or the document's date, depending on whether the parent folder is created manually or through auto-foldering. New documents that enter OnBase outside of the original date range will not appear in the folders. If auto-foldering is configured for date-based folders, then folders with the correct date ranges are created as the documents are imported.

Deleting Unnecessary and Empty Folders

From within OnBase Configuration, a Folder Type's client-side folders can be deleted using the **Delete Folders** and **Delete Orphans** options. The **Delete Folders** option deletes all folders based on a selected Folder Type. Only the folders are deleted; their contents remain available in OnBase. The **Delete Orphans** option deletes all empty folders based on a selected Folder Type.

When using either the **Delete Folders** or the **Delete Orphans** option in OnBase Configuration, choose to send the folders to Folder Maintenance rather than purge them immediately. This will allow you to review the folders that were deleted and give you a chance to undelete them if necessary.

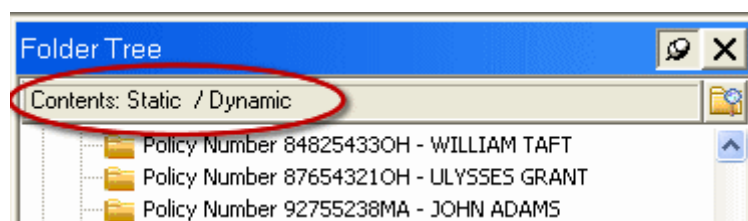
Tip: You can also delete orphaned folders automatically by configuring a scheduled process.

Client Usage

The following best practices recommendations are intended for users who work with folders in the OnBase Client.

1. As a best practice, use the **Folder Contents** | **Keywords** options only when a folder and its contents use the same Keyword Types. Otherwise, use the **Keywords** right-click option to modify folder and document Keyword values separately.
2. Use folders to automate document indexing. If you are importing documents that you know will be added to an existing folder, open the folder in the File Cabinets window and drag the file you're importing to the Documents pane. When the import dialog box is displayed, check the Document Type and Keyword values, and then import the file.
This import method reduces indexing errors by automatically populating document Keyword values with Keyword values from the Folder Type. Note that if the folder is static or static/dynamic, any Document Type can be assigned to the document imported using this method. If the folder is dynamic, only Document Types configured to dynamically populate the folder are available.
3. Be wary of folders that are both static and dynamic. You cannot remove a document from a folder if it resides there dynamically, but you can remove documents that reside in the folder statically.

To check whether a folder is static and/or dynamic, select the folder, and then read the contents bar above the folder tree.



4. If you know a folder's Folder Type and Keyword values, use a folder search to retrieve it rather than browse to it. This approach retrieves the folder more quickly and prevents OnBase from performing unnecessary queries for folder information.
5. Provide Keyword values when searching for a specific folder. Avoid performing unrestricted folder searches, which can affect performance.
6. Use the **Restore Default Display** right-click option to restore the default display settings for the advanced File Cabinets window.
7. Do not close the **Folder Tree** or **Documents** pane in the advanced File Cabinets window. These panes are integral to folder usability. If they are closed when you close the File Cabinets window, then the window reverts to its default display the next time the window is opened.
8. If you display a document in the Document Viewer and close all the panes, you can neither re-open the panes nor the restore the default display using the right-click menu. Only the document's right-click options are available. To turn the panes back on, close the File Cabinets window and then re-open it.

FOLDER CONFIGURATION WORKSHEETS

The following worksheets are designed to help you outline and plan the configuration of OnBase folders. Be sure to number the sheets as you go. Some worksheets provide fields to help you find other sheets that contain more information about a specific Folder Type.

Worksheet	Description
Parent Folder Types	Use this worksheet to outline the top-level Folder Types within a file cabinet. See Parent Folder Types on page 199 .
Folder Tree Configuration	Use this worksheet to outline the hierarchy of contents within each parent Folder Type. See Folder Tree Configuration on page 201 .
Folder Configuration	Use this worksheet to outline any child Folder Types or Document Types that will reside in a Folder Type. This worksheet is helpful for outlining the Keyword Types necessary to link child Folder Types to their parents. If the Folder Type doesn't contain any child Folder Types, use the Folder Document Configuration worksheet instead. See Folder Configuration on page 203 .
Folder Document Configuration	Use this worksheet to outline the Document Types residing in a Folder Type. This worksheet is helpful for outlining the Keyword Types necessary for auto-folding and dynamic folding configurations. See Folder Document Configuration on page 205 .







Parent Folder Types

Use this worksheet to outline the top-level Folder Types in your folder system. For each parent Folder Type, provide the following information:

Field	Description
Folder Type	Write the name of the Folder Type as it appears in Configuration.
Sheet #	If applicable, write the number located at the top of the worksheet that contains more configuration information about this Folder Type.
Auto-Folder	Select if the Folder Type is part of an auto-folding process.
Dynamic Document Types	Select if folders are dynamically populated with documents based on configured criteria.
Keyword Types	List the Keyword Types assigned to this Folder Type.



Parent Folder Types

	Parent Folder Type: _____ Sheet # _____
<input type="checkbox"/> Auto-Folder <input type="checkbox"/> Dynamic Document Type	Keyword Types: _____ _____ _____
	Parent Folder Type: _____ Sheet # _____
<input type="checkbox"/> Auto-Folder <input type="checkbox"/> Dynamic Document Type	Keyword Types: _____ _____ _____
	Parent Folder Type: _____ Sheet # _____
<input type="checkbox"/> Auto-Folder <input type="checkbox"/> Dynamic Document Type	Keyword Types: _____ _____ _____
	Parent Folder Type: _____ Sheet # _____
<input type="checkbox"/> Auto-Folder <input type="checkbox"/> Dynamic Document Type	Keywords: _____ _____ _____
	Parent Folder Type: _____ Sheet # _____
<input type="checkbox"/> Auto-Folder <input type="checkbox"/> Dynamic Document Type	Keywords: _____ _____ _____
	Parent Folder Type: _____ Sheet # _____
<input type="checkbox"/> Auto-Folder <input type="checkbox"/> Dynamic Document Type	Keywords: _____ _____ _____


Folder Tree Configuration

Use this worksheet to outline the hierarchy of contents within each parent Folder Type. Provide the following information for each child Folder Type in the hierarchy:


Field	Description
Folder Type	Write the name of the Folder Type as it appears in Configuration.
Static	Select if folders contain static links to documents.
Dynamic	Select if folders are dynamically populated with documents based on configured criteria. Write the number located at the top of the Folder Document Configuration worksheet that contains dynamic configuration information for this Folder Type.
Auto-Folder	Select if the Folder Type has auto-folding configured. Write the number located at the top of the Folder Document Configuration worksheet that contains auto-folder configuration information for this Folder Type.
Parent Folder	Select if the Folder Type is a parent Folder Type containing other Folder Types. Write the number located at the top of the Folder Configuration worksheet that outlines child Folder Type information for this Folder Type.
Keyword Types	List the Keyword Types assigned to this Folder Type.
Keyword Types to Match	List the Keyword Types used to link this Folder Type to its parent Folder Type.

Folder Tree Configuration

Sheet # _____




Folder Type: _____
Keyword Types:




Folder Type: _____
☐ Static
☐ Dynamic* Sheet # _____
☐ Auto-Folder* Sheet # _____
☐ Parent Folder** Sheet # _____
Keyword Types:

Keyword Types to Match:




Folder Type: _____
☐ Static
☐ Dynamic* Sheet # _____
☐ Auto-Folder* Sheet # _____
☐ Parent Folder** Sheet # _____
Keyword Types:

Keyword Types to Match:



Folder Type: _____
☐ Static
☐ Dynamic* Sheet # _____
☐ Auto-Folder* Sheet # _____
☐ Parent Folder** Sheet # _____
Keyword Types:

Keyword Types to Match:



Folder Type: _____
☐ Static
☐ Dynamic* Sheet # _____
☐ Auto-Folder* Sheet # _____
☐ Parent Folder** Sheet # _____
Keyword Types:

Keyword Types to Match:

* These settings require additional configuration, please refer to the assigned sheet number of the **Folder Document Configuration** worksheet.
 ** These settings require additional configuration, please refer to the assigned sheet number of the **Folder Configuration** worksheet.

Folder Configuration

Use this worksheet to outline any child Folder Types or Document Types that will reside in a Folder Type. This worksheet is helpful for outlining the Keyword Types necessary to link child Folder Types to their parents. If the Folder Type doesn't contain any child Folder Types, use the **Folder Document Configuration** worksheet instead.

Provide the following information for each child Folder Type and Document Type in the hierarchy:

Field	Description
Child Folder or Document Type	Write the name of the child Folder Type or Document Type as it appears in Configuration.
Dynamic	Select if the child Folder Type or Document Type has dynamic foldering criteria configured.
Auto-Folder	Select if the Folder Type has auto-foldering configured.
Keyword Types	List the Keyword Types assigned to the child Folder Type or Document Type.
Keyword Types to Match	For a child Folder Type, list the Keyword Types used to link the child Folder Type to its parent Folder Type. For a Document Type, list the Keyword Types used for either dynamic foldering or auto-foldering.

Folder Configuration

Sheet # _____



Parent Folder Type: _____
Keyword Types:

**OR**

Child Folder or Document Type: _____
Keyword Types:

Keyword Types to Match:

☐ Auto-Folder
☐ Dynamic

**OR**

Child Folder or Document Type: _____
Keyword Types:

Keyword Types to Match:

☐ Auto-Folder
☐ Dynamic

**OR**

Child Folder or Document Type: _____
Keyword Types:

Keyword Types to Match:

☐ Auto-Folder
☐ Dynamic

**OR**

Child Folder or Document Type: _____
Keyword Types:

Keyword Types to Match:

☐ Auto-Folder
☐ Dynamic

**OR**

Child Folder or Document Type: _____
Keyword Types:

Keyword Types to Match:

☐ Auto-Folder
☐ Dynamic

Folder Document Configuration

Use this worksheet to outline the Document Types residing in a Folder Type. This worksheet is helpful for outlining the Keyword Types necessary for auto-folding and dynamic folding.

For each Document Type, provide the following information:

Field	Description
Document Type	Write the name of the Document Type as it appears in Configuration.
Auto-Folder	Select if the Folder Type has auto-folding configured for the Document Type.
Dynamic	Select if the Folder Type has dynamic folding criteria configured for the Document Type.
Keyword Types	Write the names of the Keyword Types assigned to the Document Type.
Keyword Types to Match	List the Keyword Types used for either dynamic folding or auto-folding.

Folder Document Configuration

Sheet # _____



Folder Type: _____

Keyword Types: _____



Document Type: _____

- ☐ Auto-Folder
- ☐ Dynamic

Keyword Types: _____

Keyword Types to Match: _____



Document Type: _____

- ☐ Auto-Folder
- ☐ Dynamic

Keyword Types: _____

Keyword Types to Match: _____



Document Type: _____

- ☐ Auto-Folder
- ☐ Dynamic

Keyword Types: _____

Keyword Types to Match: _____



Document Type: _____

- ☐ Auto-Folder
- ☐ Dynamic

Keyword Types: _____

Keyword Types to Match: _____



Document Type: _____

- ☐ Auto-Folder
- ☐ Dynamic

Keyword Types: _____

Keyword Types to Match: _____



Folders

User Guide

Usage

The following topics describe how to use folders in the OnBase Client:

- [Using Folders on page 209](#)
- [Working With Folder Keywords on page 250](#)
- [Working with Folder Notes on page 257](#)
- [Printing Folder Contents on page 264](#)
- [Folder Properties on page 265](#)
- [Folder Options in the Client on page 267](#)

Using Folders

The OnBase Client offers two types of File Cabinet windows: advanced and classic. You can configure which window you prefer through User Options.

The **advanced** File Cabinets window offers additional features for retrieving folders and documents.

- Child folders can be displayed in tabs and pop-up lists. These display options are chosen by your system administrator and may differ per Folder Type.
- The window contains a document viewer that is reused to display each document you open, allowing you to view documents within the File Cabinets window.
- You can work in multiple advanced File Cabinets windows simultaneously.

To use the advanced File Cabinets window, see [Advanced File Cabinets Window on page 210](#).

The **classic** File Cabinets window does not support the same search and display features as the advanced File Cabinets window, but it offers similar functionality.

- Pop-up lists are not supported, but you can use the folder filter to filter child folders by folder name.
- Documents opened from the classic File Cabinets window are displayed in a new window, allowing you to open and view multiple folder documents simultaneously. In the advanced File Cabinets window, this is achieved by right-clicking a document and selecting **Open in New Window**.
- You can have only one classic File Cabinets window open at a time.

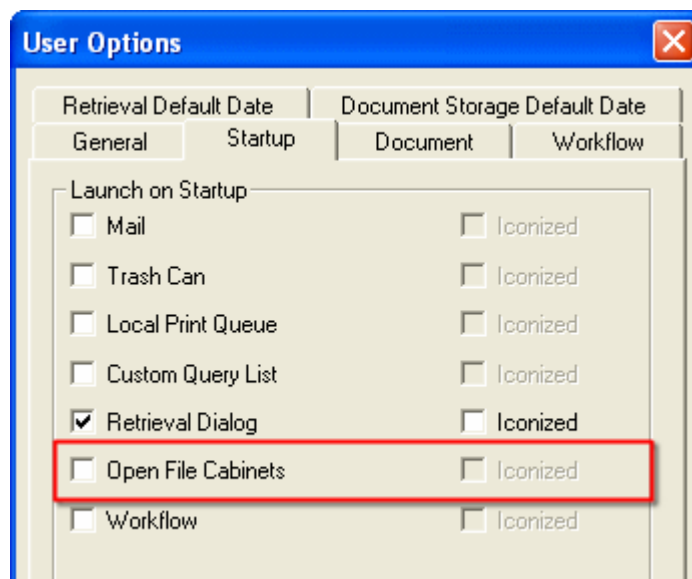
To use the classic File Cabinets window, see [Classic File Cabinets Window on page 221](#).

Opening File Cabinets on Startup

If you work with OnBase folders frequently, you may want the OnBase Client to open the File Cabinets window on startup. You can set a user option to open the File Cabinets window automatically when you log on to the OnBase Client.

1. Select **User | User Options** to display **User Options**.
2. Click the **Startup** tab.

3. Select **Open File Cabinets**.



4. To have the File Cabinets window displayed as an open window when you log on, clear the **Iconized** check box. If **Iconized** is selected, the File Cabinets window is opened when you log on, but it is minimized at the bottom of the OnBase Client window.
5. Click **OK**.

Working with Folders Overview

Folders keep related information together, allowing you to group and retrieve documents based on Keyword Values. For example, a folder might contain all documents relevant to one employee, even if the documents have different Document Types.

Depending on a folder's configuration, its contents may be ordered by:

- Document Date (ascending or descending)
- Document Type Number
- Document Type Name (ascending or descending)
- The Document Type order specified in the Folder Type configuration
- Document Name (ascending or descending)
- Random order

Advanced File Cabinets Window

To use the advanced File Cabinets window, clear the **Classic File Cabinets Window** option in User Options.

1. From the OnBase Client, select **User | User Options**.
2. On the **General** tab, clear **Classic File Cabinets Window**.
3. Click **OK**. The change is effective when you open a new File Cabinets window.

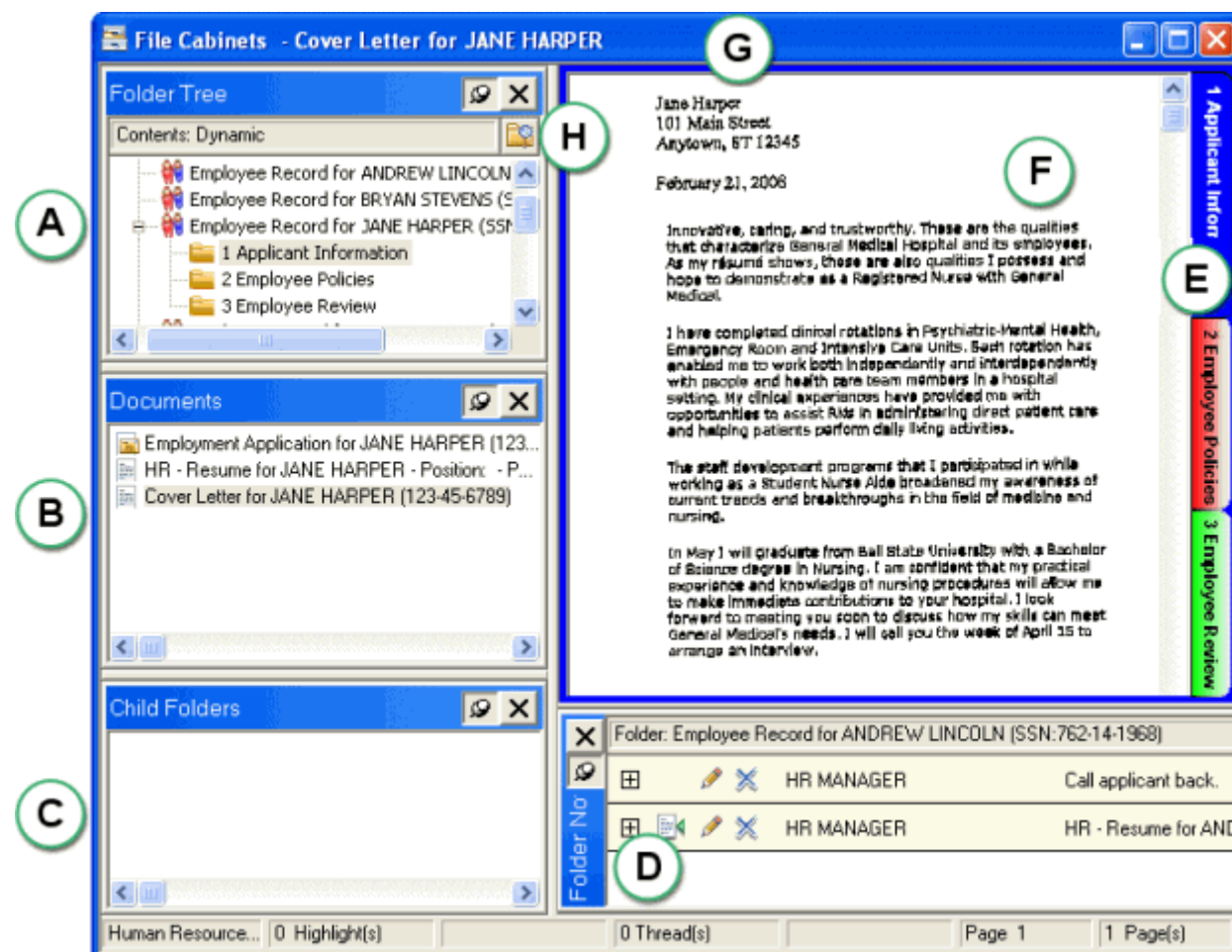
For information about using the advanced File Cabinets window, see the following sections:

- [Navigating the Advanced File Cabinets Window on page 212](#)
- [Open a Folder and View Documents on page 214](#)
- [Open Multiple Documents at the Same Time on page 215](#)
- [Displaying Folder Search Upon Clicking a Folder on page 215](#)
- [Customizing the Advanced File Cabinets Window on page 216](#)

Note: Running the OnBase Client at resolutions lower than 1024x768 impedes functionality and may prevent the File Cabinets window from working efficiently.

Navigating the Advanced File Cabinets Window

The advanced File Cabinets window comprises a set of panes for navigating OnBase folders. Each pane has a caption, or label, to describe its contents.



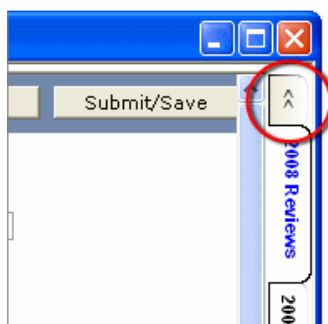
Tip: To customize the File Cabinets window, you can rearrange, float, and close panes. For instructions and other tips, see [Customizing the Advanced File Cabinets Window](#) on page 216.

Components of the advanced File Cabinets window are described in the following table:

	Component	Description
A	Folder Tree Pane	The folder tree illustrates the folder structure and the location of the current folder within the folder hierarchy. The Contents bar at the top of the pane indicates the type of contents within the current folder. For example, if the folder is dynamically populated with documents based on matching Keyword Values, Dynamic is displayed.

	Component	Description
B	Documents Pane	This pane lists documents residing in the selected folder. Depending on your configuration, this pane may also display any documents that statically reside in the selected folder's child folders. Static documents are documents that are manually added to a folder.
C	Child Folders Pane	This pane displays child folders residing in the selected folder.
D	Folder Notes Pane	This pane displays folder notes in the current branch of the folder tree, if the branch is set up to allow notes. For information about folder notes, see Working with Folder Notes on page 257 .
E	Child Folder Tabs	Depending on your folder system's setup, some parent folders may display their child folders as tabs on the right side of the File Cabinets window. Each tab represents a child folder within the parent folder. Click a tab to view the child folder's contents. When you click a tab, the background color of the Document Viewer matches the tab's color.
F	Document Viewer	The Document Viewer displays the document selected in the Documents pane.
G	Document Auto-Name	The title bar displays the Auto-Name of the selected document.
H	Find Folder Button	Click this button to search for specific folders in OnBase. More information about this feature is provided under the Folder Search topic.

If both the current folder and its parent folder are displayed as tabs, use the Up tab to select the parent folder of the current folder.



Keyboard Shortcuts

Use the following keyboard shortcuts to navigate the advanced File Cabinets window:

Shortcut	Action
Tab	Navigates counter-clockwise to the next pane.
Shift + Tab	Navigates clockwise to the next pane.
Esc	Closes an open pop-up window

Use your keyboard's arrow keys to scroll through a list of documents in the **Documents** pane. As you scroll through the documents, the selected document is displayed in the Document Viewer.

Tip: Use Client Module Shortcut Keys to navigate documents that are displayed in the Document Viewer. See this topic in the Client help for additional information.

Open a Folder and View Documents

To retrieve a document from a folder, navigate to the folder in the File Cabinets window and select the document from the **Documents** pane.

1. If the File Cabinets window is not already open, open it using either of the following methods:
 - Click the **Open File Cabinets** button from the main Client toolbar.
 - Select **File | Open | File Cabinets**.
2. Click a file cabinet to open it.
3. Select a folder to display its contents.
 - The **Child Folders** pane lists all child folders of the selected folder.
 - The **Documents** pane lists all documents in the selected folder.
 - The first document in the selected folder may be displayed in the document viewer, depending on your system's settings.
 - If the folder is configured to display its child folders as tabs, the first child folder is opened.

Note: Depending on the Folder Type configuration, the **Documents** pane may list all static documents residing in the selected folder's child folders. Static documents are those that have been manually added to a folder. See your system administrator for information about your folder system's configuration.

4. To open a folder from the **Child Folders** pane, do one of the following:
 - Double-click the folder.
 - If child folders are displayed as tabs, click the folder's tab.

5. To open a document, select it from the **Documents** pane.

Note: If a document is displayed in the advanced File Cabinets window and you make a change that requires user intervention to save, you cannot use Clear Selected or select another document until you either discard your changes or store the document as a new document or revision. For example, if you modify an ODMA-compliant document, like a Microsoft Word document, OnBase prompts you with the message **Changes cannot be applied to the current document because it is marked as read-only. Would you like to store it as a new document?** Click **Yes** or **No** to proceed.

Open Multiple Documents at the Same Time

To view multiple documents residing in a folder at the same time, use the **Open in New Window** option. This option allows you to open one or several folder documents in new windows and use the File Cabinets window to view another document.

1. From the **Documents** pane, select the document you want to open in a new window.
2. Right-click and select **Open in New Window**. The document is displayed in a separate window.
3. From the **Documents** pane, click another document to display it in the File Cabinets window. You can also display it in a new window as described in the previous step.

Displaying Folder Search Upon Clicking a Folder

Some Folder Types are configured to display the **Find Folder** dialog box when a folder of that Folder Type is selected. This dialog box allows you to search either for child folders within the selected folder, or for any folder in OnBase you have permission to access. Once you retrieve a folder, the folder is displayed in the **Folder Tree** pane as long as the File Cabinets window remains open.

For more information about folder searching, see [Folder Search Using the Advanced File Cabinets Window on page 226](#).

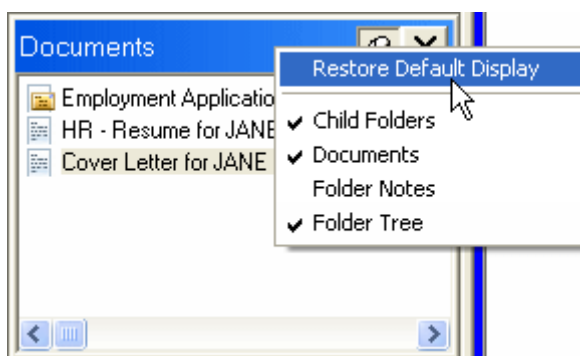
Customizing the Advanced File Cabinets Window

The advanced File Cabinets window lets you customize the size and position of its panes. Use this feature to maximize the document display area while retaining easy access to folders.

When you modify the window, your changes are preserved between OnBase sessions, provided that you do not close the **Folder Tree** or **Documents** panes. When you re-open the File Cabinets window, its arrangement is the same as it was when you last closed the window.

Note: The **Folder Tree** and **Documents** panes are integral to folder usability. If either of these panes is closed when you close the File Cabinets window, then the window is automatically restored to its default display the next time you open it.

To quickly restore the window's default arrangement, right-click any pane's caption, and select **Restore Default Display**. The caption is the blue bar displaying the pane's name.



You can customize the File Cabinets window by:

- Floating panes to place them anywhere on your screen. See [Docking and Floating Panes on page 217](#).
- Changing panes' positions within the File Cabinets window. See [Moving Docked Panes Within the File Cabinets Window on page 218](#).
- Sharing panes' docking positions. When panes share a docking position, you can toggle between them by selecting the corresponding tab. See [Sharing Docking Positions on page 218](#).
- Unpinning panes so that they are hidden until you need them. When the panes are unpinned, their captions remain available at the edge of the File Cabinets window. The panes are automatically displayed when your pointer rests over their captions. See [Unpinning Panes on page 219](#).
- Closing panes you do not use. You can open them again from the right-click menu. See [Closing Panes on page 220](#).

To move a pane, click its caption and drag it to a new location. As you do so, an outline of the pane is displayed to show you where it will be placed when you release the mouse button.

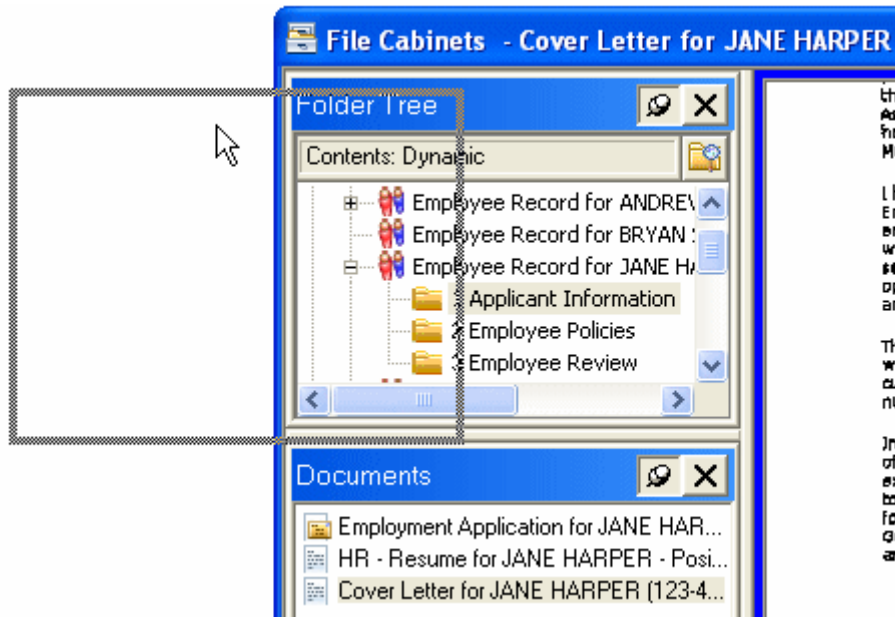
Note: If you open a folder document and close all the panes, then you cannot access the panes or the restore option from the right-click menu; only the document's right-click options are available. To restore the default display, close and re-open the File Cabinets window.

Docking and Floating Panes

A pane's docking position refers to the pane's location within the File Cabinets window. When a pane is docked, it is attached to the File Cabinets window. When a pane is floating, it is displayed in its own window separate from the File Cabinets window.

Tip: To provide quick access to OnBase folders while you are working in other applications, move a floating pane outside the OnBase Client window. For example, you can move the **Folder Tree** onto a second monitor and work in another application on your primary monitor. When you select a folder from the **Folder Tree**, the OnBase Client is brought to the foreground of your primary monitor, and you can access your documents in OnBase.

- To float a pane, click and drag its caption away from the File Cabinets window, or double-click the caption. The caption is the blue bar displaying the pane's name. If the pane shares a docking position with another pane, double-click the tab of the pane you want to float. To float all panes that share a docking position, you can either double-click one pane's caption, or click and drag one pane's caption away from the File Cabinets window.



- To dock a pane, drag it to any border within the File Cabinets window (excluding the status bar at the bottom of the window). When you drag the pane over a position where it can be docked, the pane's outline snaps to the docked position.

Moving Docked Panes Within the File Cabinets Window

You can click and drag a pane to a new, docked position within the File Cabinets window. When you drag a pane to a dockable position in the window, the pane's outline snaps to the docked position.

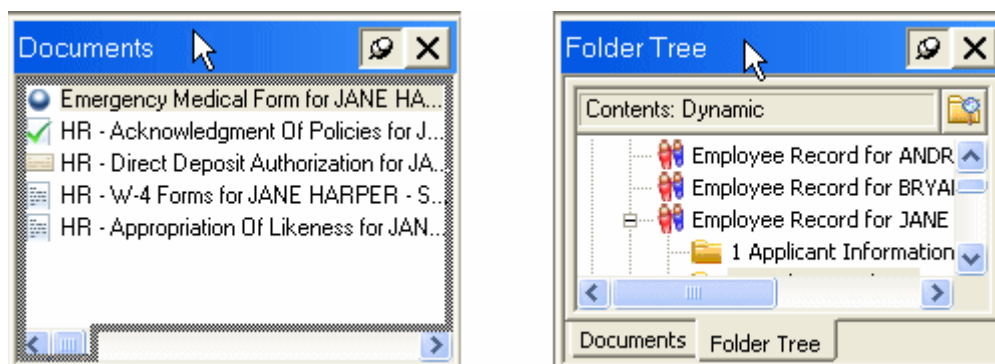
A pane can be docked to any border within the File Cabinets window, including borders of other panes. The status bar at the bottom of the window is an exception, but you can dock a pane directly above it.

If the pane will share a docking position with another pane, the pane's outline changes to include a tab. For information about sharing docking positions, read the following section.

Sharing Docking Positions

To share a docking position between panes, drag one pane to the caption of another pane. Shared docking positions help reduce the number of panes displayed at one time while providing easy access to each pane. When panes share a docking position, each pane includes a tab to let you switch between them. To display a pane in a shared docking position, click its tab.

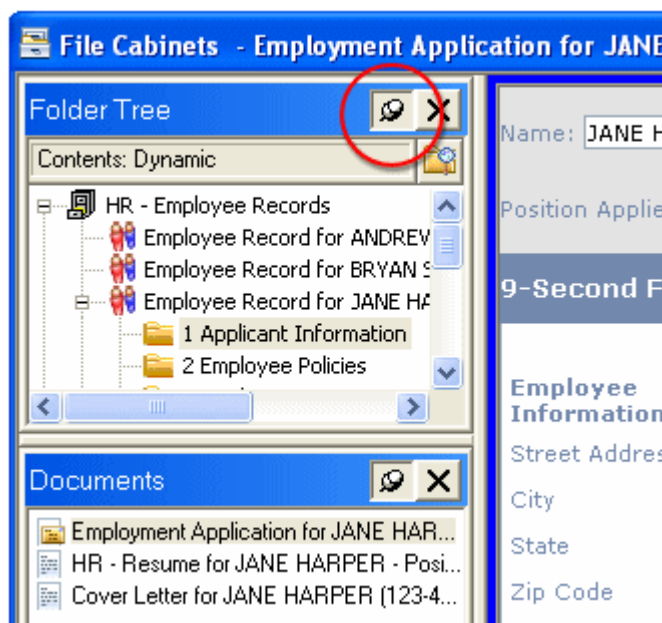
In the following example, the picture on the left illustrates a pane's outline when it is dragged to a shared docking position. The picture on the right illustrates two panes share a docking position. All folder panes can share the same docking position.



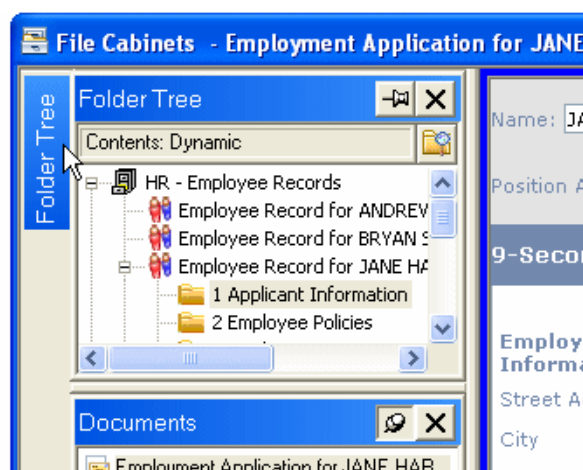
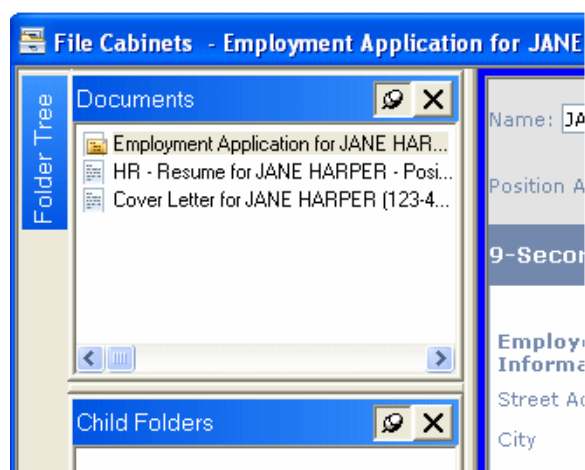
To detach a pane from a shared docking position, double-click the pane's tab. The pane then floats in its own window, allowing you to drag it to a new position.

Unpinning Panes

By default, all panes in the File Cabinets window are pinned to their current positions. When panes are pinned, they remain displayed as long as the File Cabinets window is open. You can unpin panes so that they are automatically hidden when not in use. To unpin a pane, click the pin within the pane's caption. Pins are available only on panes that are currently docked to the File Cabinets window.



When a pane is unpinned, its caption is displayed at the edge of the File Cabinets window. The pane itself is not displayed until you place your pointer over the caption. The following example illustrates what happens when the **Folder Tree** pane is unpinned. In the picture on the left, the pane is not displayed, but the **Folder Tree** caption is available so the user can access it. In the picture on the right, the **Folder Tree** pane is displayed when the user places the pointer over the caption.



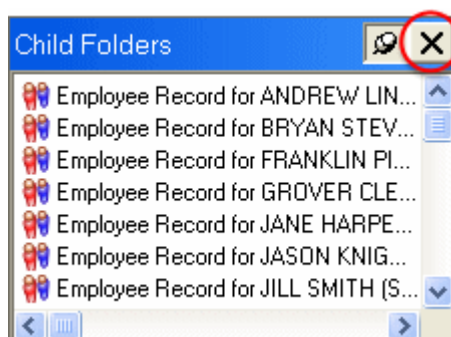
To pin a pane that is currently unpinned, click the pin in the pane's caption. When pinned, the pane remains displayed in the File Cabinets window.

Note: If you unpin a pane that is sharing a docking position, all panes that share the docking position will be unpinned. The displayed caption reflects only the most recent pane you viewed. When you place your pointer over the caption, the pane and the tabs of any shared panes are displayed.

Closing Panes

Closing panes removes them from the File Cabinets window. This feature lets you remove panes that you use infrequently and don't want taking up space on your screen. To close a pane, use either of the following methods:

- Click the **Close** button in the pane's caption.



- Right-click any caption and select the pane you want to close.

Clicking the **Close** button within an active tab of a shared docking position will only close the corresponding pane. This does not apply if the tabs reside in a floating pane.

To display a pane that you closed, right-click any caption and select the pane from the right-click menu.

To reset the File Cabinets window to its default arrangement, right-click any pane's caption and select **Restore Default Display**.

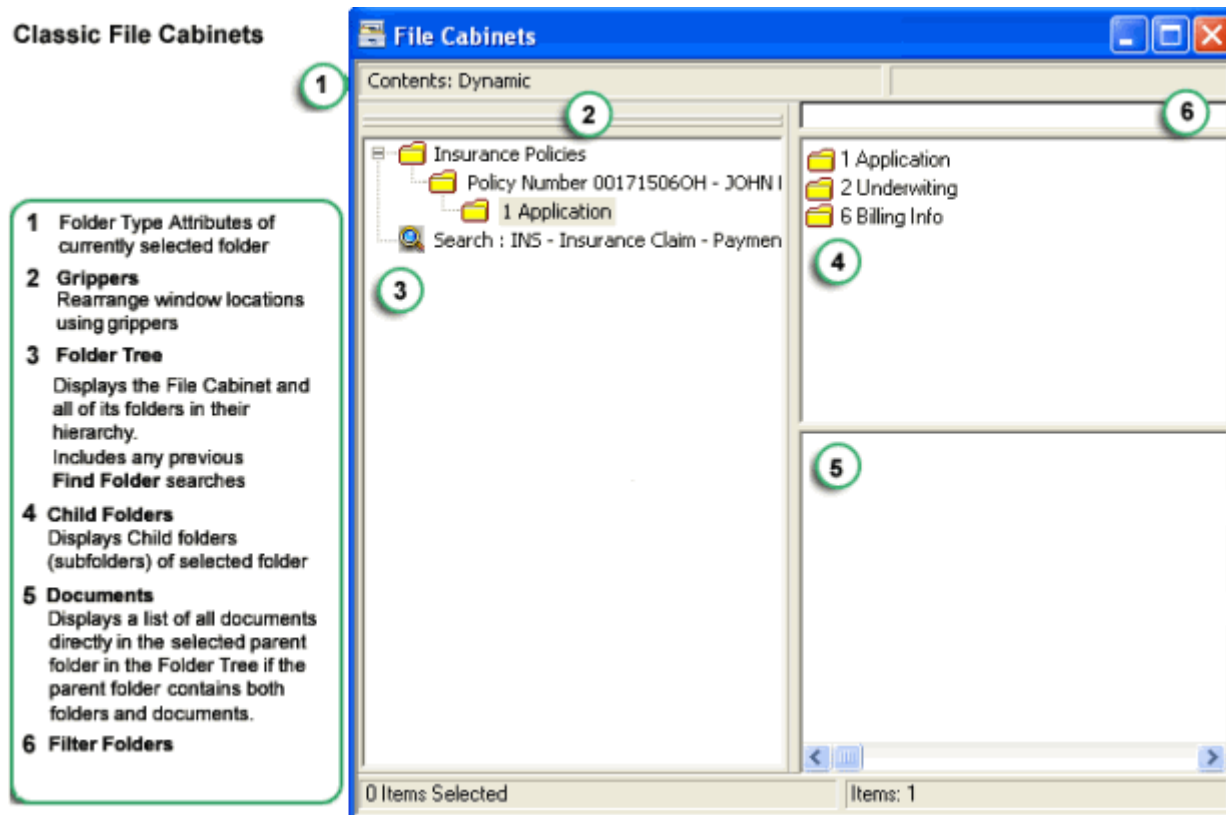
Note: The **Folder Tree** and **Documents** panes are integral to folder usability. If either of these panes is closed when you close the File Cabinets window, then the window is automatically restored to its default display the next time you open it.

Note: If you open a folder document and close all the panes, then you cannot access the panes or the restore option from the right-click menu; only the document's right-click options are available. To restore the default display, close and re-open the File Cabinets window.

Classic File Cabinets Window

1. To use the classic File Cabinets window in the OnBase Client, select **User | User Options**.
2. On the **General** tab, select **Classic File Cabinets Window**.
3. Click **OK**. The change takes effect when you open a new File Cabinets window.

Note: Only one classic File Cabinets window can be opened at a time.

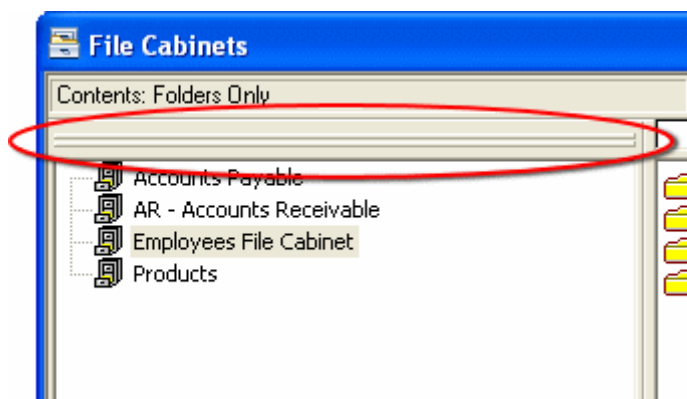


Open a Folder and View Documents

1. Double-click a folder to open it. Folders can contain additional folders and/or documents.
2. Continue opening folders until the correct folder is selected. The folder's contents are displayed in the right pane.
If a folder contains additional folders and documents, the right pane is divided into two panes. The upper pane lists the folders in the selected folder. The lower pane lists documents in the selected folder.
3. Double-click a document to open it. To open multiple documents at once, CTRL+click each document. Then, right-click and select **View Selected**.

Change File Cabinets Window Appearance

Use the grippers to move or undock the **Folder Tree** pane from the classic File Cabinets window. Grippers are the horizontal bars displayed above the **Folder Tree** pane.



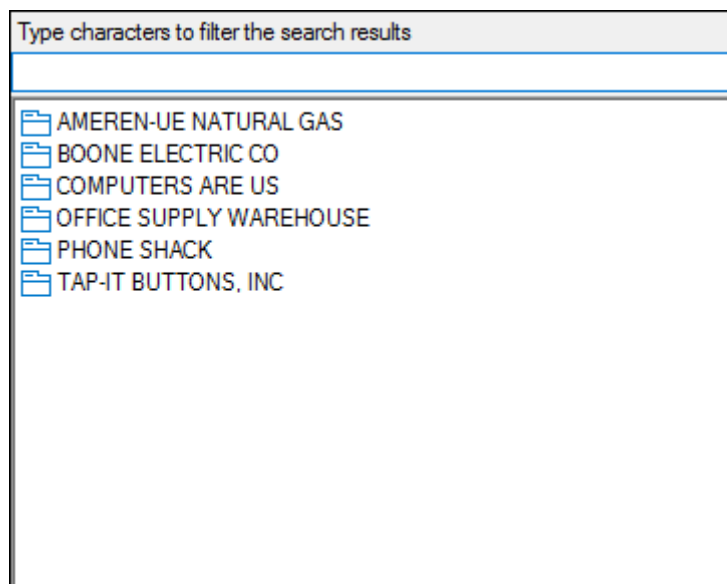
1. Ensure the grippers are displayed. To display the grippers, click the icon in the upper-left corner of the File Cabinets window and select **Toggle Grippers**.
2. Click and drag the grippers to move the **Folder Tree** pane to a new location:
 - Drag it out of the File Cabinets window to undock it.
 - Drag it to a new, docked location within the File Cabinets window.

When dragged to an undocked position, the pane has a thick gray outline. When dragged to a docked position, the pane has a thin black outline.

Tip: Press **CTRL** as you drag if you want to undock the pane. To undock the pane without pressing **CTRL**, you must drag the pane away from the File Cabinets window. By pressing **CTRL**, you can undock the pane anywhere over the File Cabinets window.

Working with Folder Pop-up Lists

Upon selecting a folder or file cabinet from the advanced File Cabinets window, you may see a pop-up list displaying child folders of the selected folder. You can filter, use right-click options on, and open folders in this list.



1. To filter the folder list, type characters in the filter bar above the list.

For example, to find folders for a customer whose name begins with P, type **P**.

The filter bar may be prepopulated with the static characters in the child folders' Auto-Names, depending on the selected Folder Type. This feature is useful when all child folder Auto-Names start with the same prefix or description. Characters that can vary in the folders' Auto-Names, such as the folder date, are not prepopulated.

Note: If no folders are displayed, begin typing the name of the folder you need. The text above the filter bar indicates the number of characters required (excluding prepopulated static characters) before folders are displayed. After you've typed the number of characters required, OnBase displays all folders matching your criteria. The minimum number of characters required is configured by your system administrator.

2. Double-click a folder to open it. The folder is added to the **Folder Tree** pane.

The following icon is also displayed in the **Folder Tree** pane under the parent folder. This icon indicates that the parent folder contains more folders that are not currently displayed.



3. Repeat these steps for each child folder you need to view. Each subsequent folder is added to the **Folder Tree** pane, making it easy to work back and forth between them.

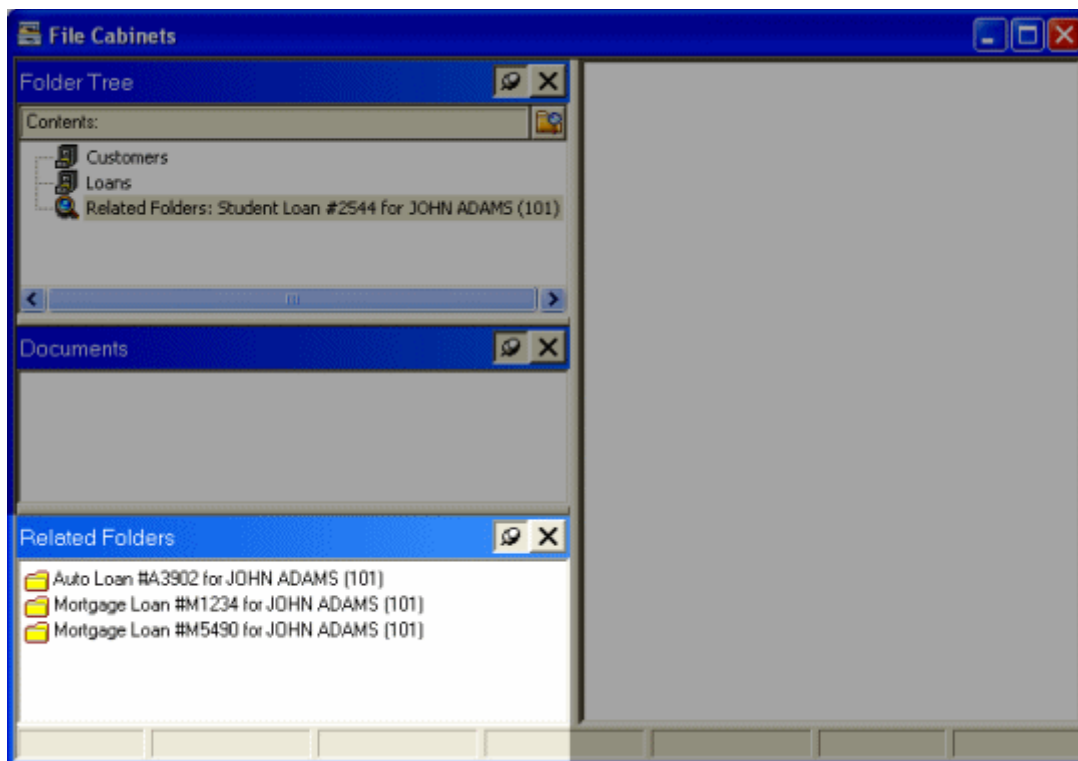
4. Folders opened from a pop-up list can be removed from the **Folder Tree** pane without deleting the folder from OnBase. Select the folder that you no longer need to view, right-click, and select **Remove From List**. The folder is removed from the **Folder Tree** pane. You can retrieve the folder again from the pop-up list, if necessary.

Retrieving Related Folders

If configured, related folders allow you to quickly access related information stored in different branches of the folder tree. Related folders and their availability vary per system. See your system administrator for information about your system's folder configuration.

Related folders are not available from the classic Folder Types window.

1. Select a folder in the **Folder Tree** or **Child Folders** pane.
2. Any related folders are listed in the **Related Folders** pane of the **File Cabinets** window.



Folder Search

You can search for folders in OnBase using the File Cabinets window.

Folder searching varies depending on whether you are using the classic or advanced File Cabinets window.

- [Folder Search Using the Advanced File Cabinets Window on page 226](#)
- [Folder Search Using the Classic File Cabinets Window on page 228](#).

Tip: If Folder Type Custom Queries are available in your system, you can retrieve folders across multiple Folder Types using the Custom Queries window. See [Folder Type Custom Queries on page 229](#) for more information.

Folder Search Using the Advanced File Cabinets Window

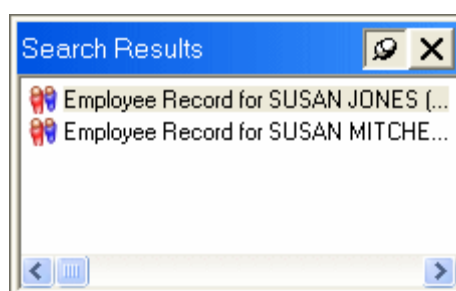
1. Open the File Cabinets window:
 - Click the **Open File Cabinets** button from the main Client toolbar.
 - Select **File | Open | File Cabinets**.
2. Click the **Find Folder** button, or right-click the **Documents** or **Child Folders** pane and select **Find Folder**.



The **Find Folder** dialog box is displayed.

3. Select the Folder Type.

4. Enter Keyword Values to narrow your search.
 - If a Folder Type requires a Keyword Value for searching, the required Keyword Type is displayed in red.
 - To add another instance of an individual Keyword Type, double-click the Keyword Type's name or press **F6**.
 - If the folder uses a Multi-Instance Keyword Type Group, the Keyword Type fields are in a collapsed state. Expand them by clicking the symbol to the left of the Keyword Type Group's name or by pressing **Ctrl + O**. To add another instance of the Keyword Type Group, double-click the Keyword Type Group's name.
5. Click **Find**.
 - OnBase returns all matching folders that you have rights to view, regardless of the associated file cabinet. The results of a folder search are displayed in the **Search Results** pane, which replaces the **Child Folders** pane.



- If only one folder matches the search criteria, it is opened automatically.

Note: A search may return the same folder multiple times if the folder is indexed with multiple instances of a Keyword Type Group and each instance has the same value for a Keyword Type used in your search.

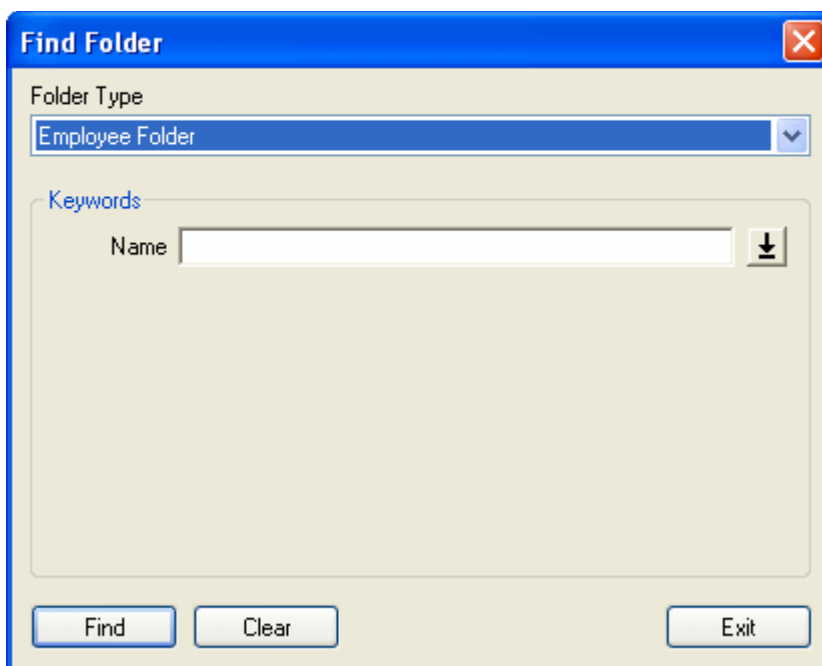
6. Double-click a folder to view its contents. The **Folder Tree** pane displays the folder's location.
7. Each subsequent search is added to the **Folder Tree** pane and remains there as long as the File Cabinets window is open.

To remove a selected search from the File Cabinets window, right-click it and select **Remove From List**. This option works only for searches with multiple results. If only one folder was returned, selecting the search takes you immediately to the folder.



Folder Search Using the Classic File Cabinets Window

1. Open the File Cabinets window:
 - Click the **Open File Cabinets** button from the main Client toolbar, or
 - Select **File | Open | File Cabinets**.
2. Right-click the **Documents** or **Child Folders** pane and select **Find Folder**.
3. Select the Folder Type from the **Find Folder** dialog box.



4. Enter Keyword Values to narrow your search.
 - If a Folder Type requires a Keyword Value for searching, the required Keyword Type is displayed in red.
 - To add another instance of an individual Keyword Type, double-click the Keyword Type's name or press **F6**.
 - If the folder uses a Multi-Instance Keyword Type Group, the Keyword Type fields are in a collapsed state. Expand them by clicking the symbol to the left of the Keyword Type Group's name or by pressing **Ctrl + O**. To add another instance of the Keyword Type Group, double-click the Keyword Type Group's name.
5. Click **Find**. OnBase returns all matching folders that you have rights to view, regardless of the associated file cabinet. The results of a folder search are displayed on the right side of the **File Cabinets** window.

Note: A search may return the same folder multiple times if the folder is indexed with multiple instances of a Keyword Type Group and each instance has the same value for a Keyword Type used in your search.

6. Double-click a folder to view its contents. The folder tree displays the folder's location.

Folder Type Custom Queries

Folder Type Custom Queries work like other Custom Queries, except they retrieve folders rather than documents.

When a Custom Query is used for folder retrieval, the results list displays all folders satisfying the search criteria. A folder may be listed multiple times if it has more than one value for a Keyword Type that is used as a display column.

The right-click options available for folder search results allow you to perform folder-related tasks, such as viewing folder Keyword Values or printing folder contents. To open a folder in the File Cabinets window, double-click it from the list. If only one folder is returned, the File Cabinets window opens the folder automatically.

Note: If you are using the classic File Cabinets window, the File Cabinets window is opened, but the folder is not automatically displayed. To change this behavior, clear the **Classic File Cabinets Window** option in your **User Options**.

For general information about using Custom Queries, see the **Working With Custom Queries** topic in the OnBase Client help.

Creating a File Cabinet

File cabinets are created by your system administrator in the Configuration module.

Creating Folders in the Client

If you have sufficient privileges, you can manually create folders within a file cabinet or another folder in the OnBase Client.

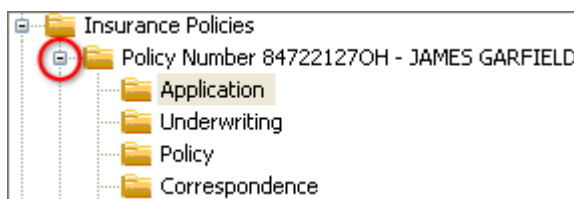
Under some conditions, you may be unable to create a folder. For more information, see [If You Cannot Create a Folder on page 233](#).

To create a new folder:

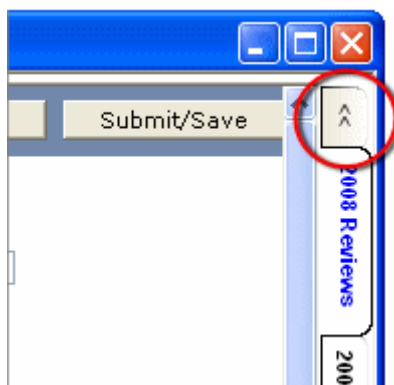
1. Open the File Cabinets window using either of the following methods:
 - Click the **Open File Cabinets** button from the main Client toolbar.
 - Select **File | Open | File Cabinets**.
2. Select the folder or file cabinet where the new folder should reside.

When you select a folder, its first child folder may be automatically selected. To select only the parent folder, do the following:

 - Collapse the folder by clicking the - symbol to the left of its name.



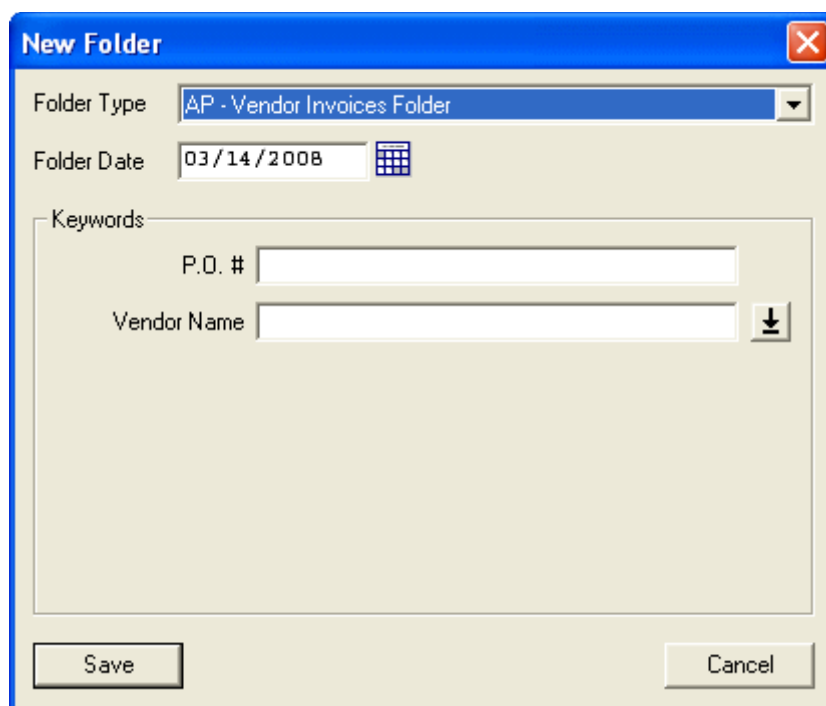
- If applicable, click the up-level tab located above the tabs displayed in the File Cabinets window. This tab is available when both the current folder and the parent folder are displayed as tabs.



3. Right-click in the **Documents** or **Child Folders** pane and select **New Folder**. If this option is unavailable, the file cabinet or folder may not allow you to create child folders, or you may lack folder creation privileges.

4. Select the Folder Type for the new folder.

The Folder Type determines the configuration options for a folder, including its Keyword Types and whether the folder is static or dynamic. For information about your system's Folder Types, contact your system administrator.



The screenshot shows a 'New Folder' dialog box with a blue title bar and a close button. The 'Folder Type' is set to 'AP - Vendor Invoices Folder'. The 'Folder Date' is '03/14/2008'. The 'Keywords' section contains two input fields: 'P.O. #' and 'Vendor Name'. The 'Vendor Name' field has a download icon. At the bottom are 'Save' and 'Cancel' buttons.

5. Enter the Keyword Values for the new folder. The following features may facilitate folder indexing:
 - Keyword Type drop-down lists
 - Cascading Data Sets
 - F6 Keyword Type duplication
 - Multi-Instance Keyword Type Groups
 - AutoFill Keyword Sets
 - Required Keyword Types.

When you create a new child folder, it inherits default Keyword Values from the parent folder. Change these values as needed. You can also change the **Folder Date** to have the folder's date to match the date of its contents.

Note: Dates in folder names may be based on the Folder Date, which you can change, or the folder's creation date, which you cannot change. Folders that use date ranges—by month or year, for example—must have the correct Folder Date entered when the folder is created. You cannot change a date range on a folder after it has been saved.

6. Click **Save** when finished. The folder is available in the folder tree. If the Folder Type is set up to auto-create child folders, the folder and its child folders are available.

If You Cannot Create a Folder

Your ability to create folders depends on your user privileges, the type of folder you want to create, and whether a folder already exists.

The **New Folder** option is unavailable for folders that do not allow child folders to be manually created. In addition, some folders may allow you to create only child folders based on a specific Folder Type. This restriction ensures a folder contains only child folders that belong there.

To prevent duplicate folder creation, OnBase prohibits you from creating folders with the same indexing information as an existing folder. You cannot create a child folder that has the same Folder Type and Keyword Values as another child folder within the same parent folder.

Child folders can have the same Folder Type and Keyword Values only if they reside within different parent folders or if they are date-based folders that have different date ranges. For example, if two child folders use a monthly date range, and their Folder Dates are from different months, then the child folders can have identical Keyword Values and reside within the same parent folder. For information about how your folder system is set up, see your system administrator.

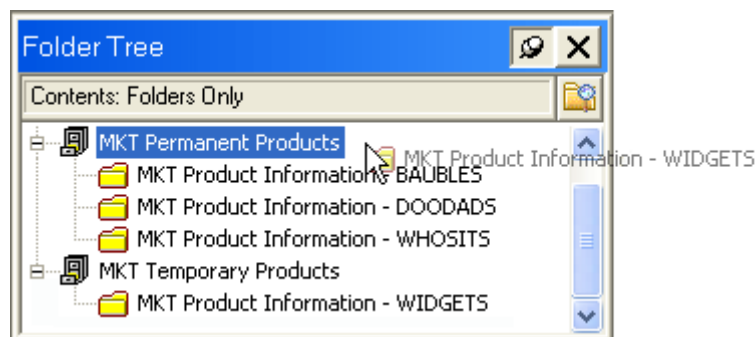
Moving Folders in the Client

Depending on your system's configuration, some Folder Types may let you move folders from one parent folder to another. Movable folders offer the flexibility to change how a folder and its contents are classified in your folder system. When you move a folder to a new parent folder, OnBase can update Keyword Values on the moved folder and its contents. For a description of when and how Keyword Values are updated, read the [Keyword Value Update Rules for Moved Folders on page 235](#).

Under some conditions, you may be unable to move a folder. For more information, see [If You Cannot Move a Folder on page 234](#).

1. Open the new parent folder (where you are moving a folder to) in the **Folder Tree** pane of the advanced File Cabinets window. This ensures you can access the folder in a later step.
2. Select the folder you want to move in the **Folder Tree** pane.
3. From the **Folder Tree** pane, place your pointer over the folder you want to move and hold down the right mouse button.

4. Keeping the right mouse button pressed, drag the selected folder to its new parent folder. If the folder you selected can be copied or moved, OnBase displays the folder under your pointer as you drag it.



- To scroll up to a folder, rest your pointer on the folder or file cabinet at the top of the **Folder Tree** pane.
 - To scroll down, rest your pointer on the folder or file cabinet at the bottom of the **Folder Tree** pane.
 - To open a collapsed folder, rest your pointer over it. This feature works only if you have previously opened the collapsed folder.
5. When the new parent folder is selected, release the right mouse button.
 6. Select **Move Here** to confirm the move. To cancel moving the folder, select **Cancel**.
If OnBase won't let you move the folder, see [If You Cannot Move a Folder on page 234](#) to verify whether all requirements are met.

When you move a folder, you may be prompted to confirm that you want to continue. OnBase asks for confirmation under these conditions:

- The move and Keyword update operation will take longer than three seconds.
- The moved folder or new parent folder have multiple or blank values for any of the common parent Keyword Types. Under these conditions, no values will be updated.

For more information about how Keyword Values are updated, see [Keyword Value Update Rules for Moved Folders on page 235](#).

If You Cannot Move a Folder

You may be unable to move a folder under any of the following conditions:

- You have insufficient privileges to move the folder.
- The folder's Folder Type is not movable.
Contact your system administrator for information about which folders are movable.
- Another user is currently modifying the folder you want to move.
- Another user is modifying the contents of the folder you want to move. This condition can prevent you from moving a folder if the original parent folder and the new parent folder are based on the same Folder Type.
- The new parent folder doesn't let you add folders due to a configuration setting.
Some parent folders may only let you add folders of specific Folder Types, and others may prevent you from adding any child folders.

- The new parent folder contains a matching folder.
If the folder being moved will have the same Keyword Values and Folder Type as another folder within the new parent, you cannot move the folder to that parent. This restriction prevents the creation of duplicate folders. OnBase takes into account whether Keyword Values will be updated on the moved folder before restricting the move.

Note: When you move a folder that resides in a parent folder for folder notes, any bookmarks referencing the moved folder are broken. The bookmark remains in the original parent folder, but clicking the bookmark's **Go to Page** button results in an error stating that the referenced item could not be found. If you move a parent folder for folder notes, then all folder notes remain intact and are moved with the parent.

Folders can be moved only in the OnBase Client. You cannot move folders in the OnBase Web Client or Unity Client.

Keyword Value Update Rules for Moved Folders

OnBase uses the following rules to update Keyword Values on a moved folder and its contents:

- If the new parent folder has a different Folder Type than the original parent folder, then no Keyword Values are updated.
- If the original parent folder and the new parent folder are based on the same Folder Type, then OnBase updates the values of Keyword Types configured as “common parent Keyword Types” on the moved folder and its contents.
- If either the moved folder or the new parent folder have multiple or blank Keyword Values for any of the common Keyword Types, then no Keyword Values are updated. If contents won't be updated, OnBase displays a notification and requests confirmation to move the folder.
- If the moved folder and its contents have different values for a common Keyword Type, then that Keyword Type is not updated on child folders and documents. This rule prevents the improper updating of values when the contents should have different values than the moved folder.

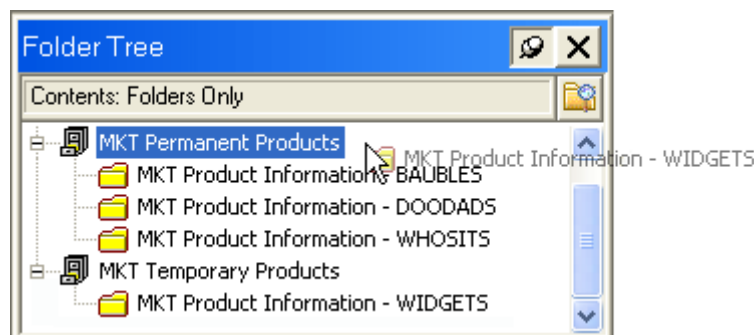
Copying Folders in the Client

Depending on your system's configuration, some Folder Types may let you copy folders from one parent folder to another. Copyable folders let you quickly create duplicate records of data in your folder system while maintaining only one set of documents. All Keyword Values from the original folders are replicated on the copies.

Under some conditions, you may be unable to copy a folder. For more information, see [If You Cannot Copy a Folder on page 236](#).

1. Open the folder where you want to add copied folders in the **Folder Tree** pane of the advanced File Cabinets window. This ensures you can access the folder in a later step.
2. Select the folder you want to copy in the **Folder Tree** pane.
3. From the **Folder Tree** pane, place your pointer over the folder you want to copy and hold down the right mouse button.

4. Keeping the right mouse button pressed, drag the selected folder to the folder you opened in step 1. If the folder you selected can be copied or moved, OnBase displays the folder under your pointer as you drag it.



- To scroll up to a folder, rest your pointer on the folder or file cabinet at the top of the **Folder Tree** pane.
 - To scroll down, rest your pointer on the folder or file cabinet at the bottom of the **Folder Tree** pane.
 - To open a collapsed folder, rest your pointer over it. This feature works only if you have previously opened the collapsed folder.
5. When the correct parent folder is selected, release the right mouse button.
 6. Select **Copy Here** to copy the folder. To cancel copying, select **Cancel**.
If OnBase won't let you copy the folder, see [If You Cannot Copy a Folder on page 236](#) to verify whether all requirements are met.

If You Cannot Copy a Folder

You may be unable to copy a folder under any of the following conditions:

- You have insufficient privileges to copy the folder.
- The folder's Folder Type is not copyable.
Contact your system administrator for information about which folders are copyable.
- Other users are currently modifying the folder you want to copy.
- The new parent folder doesn't let you add folders due to a configuration setting.
Some parent folders may only let you add folders of specific Folder Types, and others may prevent you from adding any child folders.
- The new parent folder contains a matching folder.
If the folder being copied has the same Keyword Values and Folder Type as another folder within the new parent folder, you cannot copy the folder to that parent. This restriction prevents the creation of duplicate folders.

Folders can be copied only in the OnBase Client. You cannot copy folders in the OnBase Web Client.

Deleting Folders and Documents in a Folder

The following topics describe how to delete folders and their contents from OnBase. To remove a document from a folder without deleting it from OnBase, see [Removing Documents from Folders on page 242](#).

Deleting Documents from Both a Folder and OnBase

To delete a document from OnBase:

1. Right-click the document and select **Delete**.
2. OnBase displays a warning message, indicating that the delete operation will remove data. To confirm deletion, click **Yes**. To cancel deletion, click **No**.

The document is deleted from the folder and OnBase. The document is no longer accessible from the **Document Retrieval** dialog box. Deleted documents are sent to Document Maintenance until they are permanently purged by the system administrator.

Deleting Folders

You can delete folders by using a right-click option. Deleting a folder does not remove its documents from OnBase. The documents remain available from other Document Retrieval methods.

To delete a folder, you must have sufficient privileges to the folder and its child folders. If you attempt to delete a folder containing a child folder that you lack privileges to delete, you cannot delete the parent folder or the restricted child folder(s). Child folders that you have privileges to delete are deleted.

Note: Deleted folders can only be restored from Folder Maintenance by your system administrator.

1. Right-click a folder and select **Delete**. This removes the folder, its child folders, and documents from the file cabinet.
2. OnBase displays a warning message, indicating that the delete operation will remove data. To confirm deletion, click **Yes**. To cancel deletion, click **No**.

Caution: Purging a batch process that was auto-foldered purges the empty folders created by the process—they are not sent to Folder Maintenance. Likewise, deleting a file cabinet purges all of the child folders, if the child folders are allowed to be deleted. The child folders are not sent to Folder Maintenance.

Automatically Index Documents Using Folders

1. Open the appropriate folder.

Note: To create a folder, see [Creating Folders in the Client on page 231](#).

2. Right-click the folder and select **Keywords** to check the Keyword Values assigned to the folder. Enter Keyword Values for the folder, if necessary.
3. Ensure the correct folder is selected in the **Folder Tree** pane.
4. Select a file to import from outside of OnBase.
5. Drag and drop the file to the folder in the **Folder Tree** pane, to the **Documents** pane, or to the **Child Folders** pane. The **Import Document** dialog box is displayed.

Note: Even if a different folder is selected in the **Child Folders** pane, the document will be imported into the folder selected in the **Folder Tree** pane.

6. Select the appropriate Document Type and any other selections.
 - If the folder is dynamic, only Document Types assigned to the Folder Type are available.
 - If no Document Types are available, then you do not have privileges to any Document Type assigned to this Folder Type. In this situation, you can import the document into OnBase, but it will not be placed in the folder.
7. Any Keyword Types shared with the folder are populated with the folder's corresponding Keyword Values.

If the folder contains the Primary Keyword Value of an AutoFill Keyword Set that is assigned to the Document Type, its Secondary Keyword Values also are automatically populated.
8. Click **Import**. The document is imported.

Note: To drag and drop multiple files to be queued for import, you must be licensed for EDM Services.

Clear Selected

Select **Clear Selected** to clear the selected items in a Document Search Results list or in a list of documents in a folder or envelope.

In the advanced File Cabinets window, the viewer displays the selected document. To clear the selection from the list and the viewer, select **Clear Selected**.

Note: If you have modified a document in the advanced File Cabinets window, you must either save or discard your changes before closing the document. When you open another document or select **Clear Selected**, you are prompted to save your changes (to a new document, for example) or discard them.

Applying a Folder Template

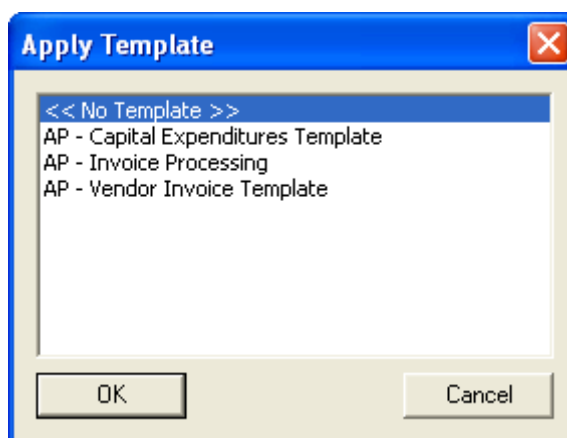
Folder templates help you navigate a folder's contents by doing the following:

- Filtering the view of folder contents when you open the folder. A template can be configured to display documents in a certain order by Document Type, or to display only documents of a certain Document Type by default.
- Providing a visual indicator of documents missing from the folder. For example, if a Patient Information folder is supposed to contain the patient's Driver's License, a folder template may display an error message if the Driver's License Document Type is missing from the folder.
- Identifying whether documents are missing certain Keyword Values, which may have been unavailable when the documents were indexed.
- Sorting documents so they are displayed in a consistent sequence.

Note: For additional information on using the advanced or classic File Cabinets window, see [Advanced File Cabinets Window on page 210](#) or [Classic File Cabinets Window on page 221](#).

To apply or remove a template:

1. Right-click anywhere within the **Documents** pane and select **Template**.
The **Apply Template** dialog box is displayed.



2. Select a template. If the folder has a template applied and you want to remove it, select **<<No Template>>** to display all the contents of the folder. Contents are displayed according to the configured Document Type order of the folder.

Note: Depending on the template configuration, all contents of the folder may be displayed when a template is applied. If this is the case, template documents are displayed first, followed by documents that do not meet the template criteria.

3. Click **Apply**.
The **Documents** pane displays any applicable documents or information.

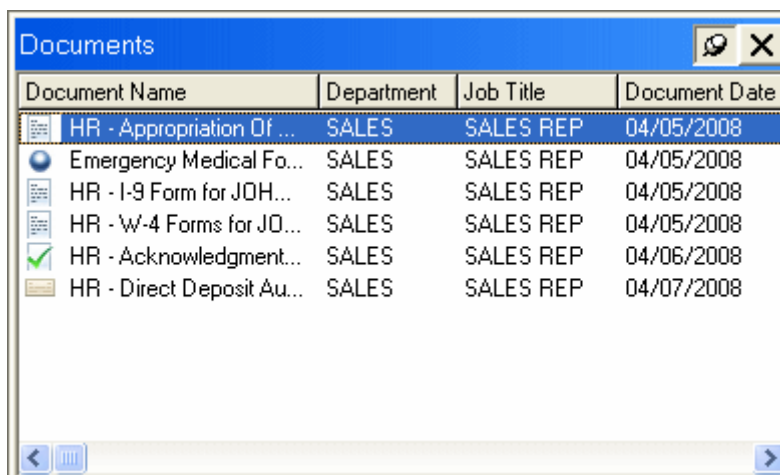
Note: A folder template and a folder filter cannot be applied to a folder simultaneously. If you apply a filter to a folder with a template applied, the template is removed before the filter is applied. If you apply a template to a folder with a filter applied, the filter is removed before the template is applied.

Applying Folder Filters

Note: Users without rights to certain filters will not see those filters displayed.

You can filter and sort documents in a folder using folder filters. Folder filters let you perform the following tasks:

- Organize and sort documents by Keyword Value, name, or date. Filters display information about each document in columns that you can use for sorting.
- Display only documents that have a specific Keyword Value. Filters that use forms let you filter the documents by submitting Keyword Values on the form.
- Display only documents within a subset of Document Types. For example, you may have a dynamic folder with multiple Document Types assigned to it, but you need quick access only to specific Document Types on a regular basis.



Document Name	Department	Job Title	Document Date
HR - Appropriation Of ...	SALES	SALES REP	04/05/2008
Emergency Medical Fo...	SALES	SALES REP	04/05/2008
HR - I-9 Form for JOH...	SALES	SALES REP	04/05/2008
HR - W-4 Forms for JO...	SALES	SALES REP	04/05/2008
HR - Acknowledgment...	SALES	SALES REP	04/06/2008
HR - Direct Deposit Au...	SALES	SALES REP	04/07/2008

Note: Folder filters are available from the advanced File Cabinets window in the OnBase Client, the Web Client Folders window, and the Unity Client File Cabinets layout. They are not available from the classic File Cabinets window.

Filters are similar to another function of folders called folder templates. Both can display a subset of documents within a folder, but templates and filters perform different tasks. When choosing between a filter or template, consider what you want to accomplish. Whereas folder templates help ensure that a folder has a complete set of documents, folder filters let you quickly see information about documents organized in sortable columns.

Note: Folder filters are not available for Workflow folders using the Classic Client interface for Workflow.

A folder template and a folder filter cannot be applied to a folder simultaneously. If you apply a filter to a folder with a template applied, the template is removed before the filter is applied. If you apply a template to a folder with a filter applied, the filter is removed before the template is applied.

Some folders may have a default filter applied when the folder is opened. When a filter is applied, the **Documents** pane is divided into columns with headers at the top of the pane. To determine which filter is applied, right-click within the **Documents** pane and select **Filter Documents**. The applied filter has a check mark next to its name. To remove the filter, select **<No Filter>** from the **Filter Documents** options. Removing the filter may be necessary to display all the documents in a folder.

To apply a folder filter:

1. Right-click within the **Documents** pane and select **Filter Documents**.
2. Select a filter.
3. If a form is displayed in a separate window, type the Keyword Values to filter the folder by, and submit the form.
4. To sort the filtered list of documents, click the header above the column you want to sort by.

For example, if one column contains the **Document Date**, click the header to sort documents in ascending chronological order; click the header again to sort documents in descending chronological order.

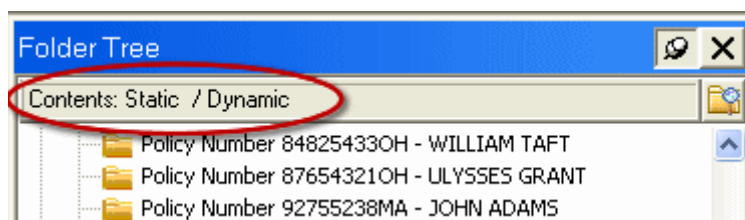
Adding and Removing Documents

The following topics describe how to manage folder contents by adding or removing documents.

Adding Documents to Folders

Users with sufficient privileges can add OnBase documents to a static folder by dragging the documents to the File Cabinets window. A single document can reside in multiple folders, because folders contain pointers to documents rather than actual copies.

1. Open the destination folder in the **Folder Tree** pane. Ensure the **Contents** bar above the pane says either **Static** or **Static / Dynamic**. Documents can be manually added only to folders that allow static contents.



2. From an open document or from a list with one or more documents selected, press and hold the right mouse button to hook the document(s).

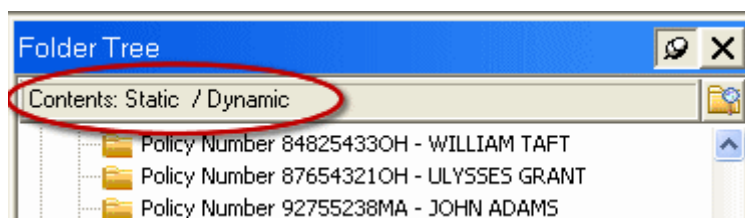
3. Drag the document(s) to the File Cabinets window and release the mouse button. The **Documents** pane displays the added document(s).

Note: You may be unable to manually add documents to any folders. You cannot manually add documents to dynamic folders, because their contents are dynamically determined based on Keyword Values. See your system administrator for information about static and dynamic Folder Types.

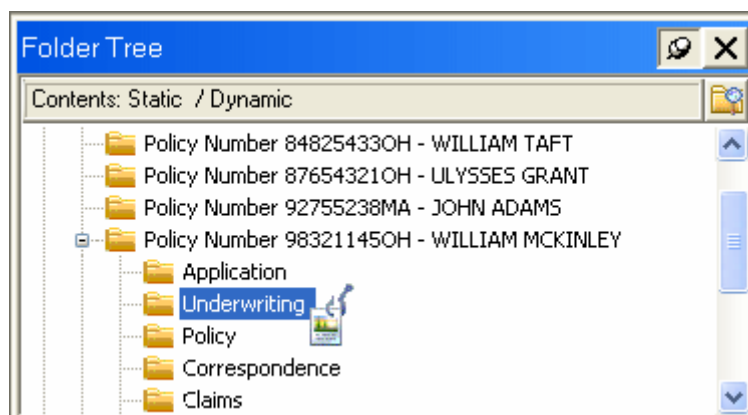
Copying or Moving Documents to Folders

You can organize folder contents by moving and copying documents to and from static folders.

1. From the advanced File Cabinets window, open the folder where you want to add documents.
2. Ensure the **Contents** bar above the folder tree says either **Static** or **Static / Dynamic**. Documents can be manually added only to folders that allow static contents.



3. Open the folder containing the document(s) you want to move or copy.
4. Select the document(s) you want to move or copy. To select multiple documents, press **CTRL** or **SHIFT** as you click them.
5. Press and hold the right mouse button to hook the documents.
6. Keeping the right mouse button pressed, drag the selected document(s) to the folder opened in step 1.



- To scroll up to the folder, rest your pointer on the folder or file cabinet at the top of the **Folder Tree** pane.
- To scroll down, rest your pointer on the folder or file cabinet at the bottom of the **Folder Tree** pane.

- To open a collapsed folder, rest your pointer over it. This feature works only if you have previously opened the collapsed folder.
- 7. When the folder is selected, release the right mouse button. If the documents' original folder allows static contents, OnBase presents options to move or copy the documents.
 - Select **Copy Here** to copy the documents to the selected folder. When a document is copied, each folder links to a single copy of the document in OnBase. If the document is modified in one location, the change is reflected in all locations.
 - Select **Move Here** to add the documents to the selected folder and remove them from the original folder.
 - Select **Cancel** if you do not want to move or copy the documents to the selected folder.

If these options are not presented, you may have insufficient rights to remove documents from the original folder, or the original folder is dynamic and the documents cannot be removed from it. The documents are still added to the selected folder if it allows documents to reside in it statically.

Note: You may be unable to move or copy a document if you have insufficient privileges to add documents to the target folder, if the target folder does not allow documents to reside in it statically, or if the document already resides in the target folder. In addition, documents cannot be added to folders that are currently being modified.

Importing Documents Using Folders

You can simultaneously import a document into OnBase and add it to a selected folder by dragging and dropping the document into the **Documents** pane. This process also automatically indexes the document with Keyword Values from the folder.

For more information, see [Automatically Index Documents Using Folders on page 238](#).

Removing Documents from Folders

The following procedure removes documents from a folder without removing them from OnBase. Removed documents remain accessible through standard retrieval methods, such as the **Document Retrieval** dialog box. To delete foldered documents from OnBase, see [Deleting Folders and Documents in a Folder on page 237](#).

The following limitations apply to removing documents from folders:

- If the folder is configured as dynamic, the **Remove From Folder** option is not available.
- You cannot remove a Certificate of Destruction from a folder. For more information on Certificates of Destruction, see the **Records Management** module reference guide.
- If a Folder Type is configured to **Include Child Folder Static Contents**, you can only remove a document in a child folder from the folder it was added to, not from the parent folder.

To remove documents from a folder:

1. Select one or more documents in the folder.
2. Perform either of the following actions:
 - Right-click and drag the documents to the Client module desktop.
 - Right-click and select **Remove From Folder**.
3. Confirm the removal, when prompted.

Filtering the View of Available Folders

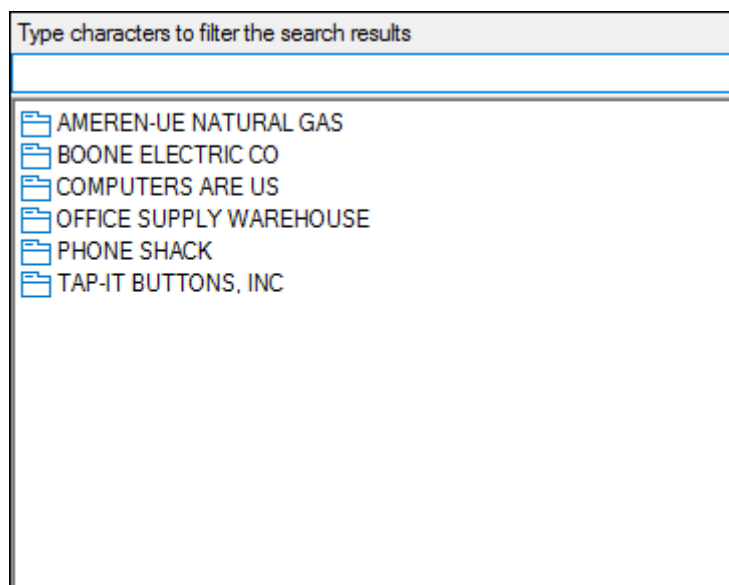
When working with folders in the OnBase Client, you can filter a folder's contents to display only the child folders necessary for the current task.

The steps to filter folders vary depending on whether you are using the classic or advanced File Cabinets window. For the advanced File Cabinets window, see the following procedure. For the classic File Cabinets window, see [Classic File Cabinets Window on page 221](#).

Advanced File Cabinets Window

From the advanced File Cabinets window, you can filter child folders displayed in a pop-up list. Your system administrator determines whether folders display child folders in a pop-up list.

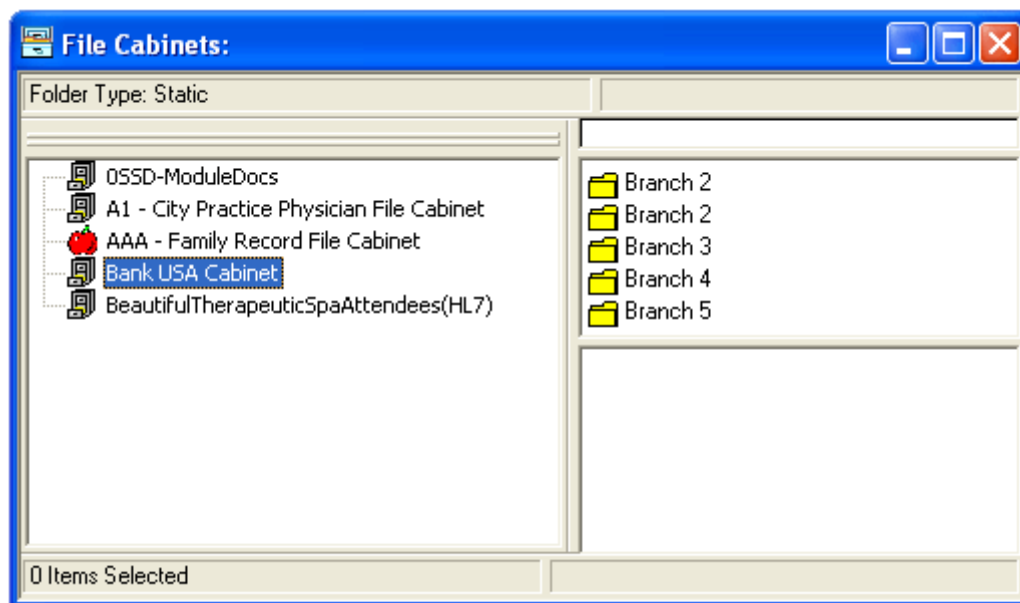
1. From the File Cabinets window, click a file cabinet to display its folders in the **Child Folders** pane.
2. Open the folder configured to display child folders in a pop-up list.



3. Type the first characters in the folder's name in the filter bar at the top of the pop-up list. The list is filtered according to the characters you enter.
For example, if every folder name begins with CA or NY, you could type NY to only see folders that begin with NY.

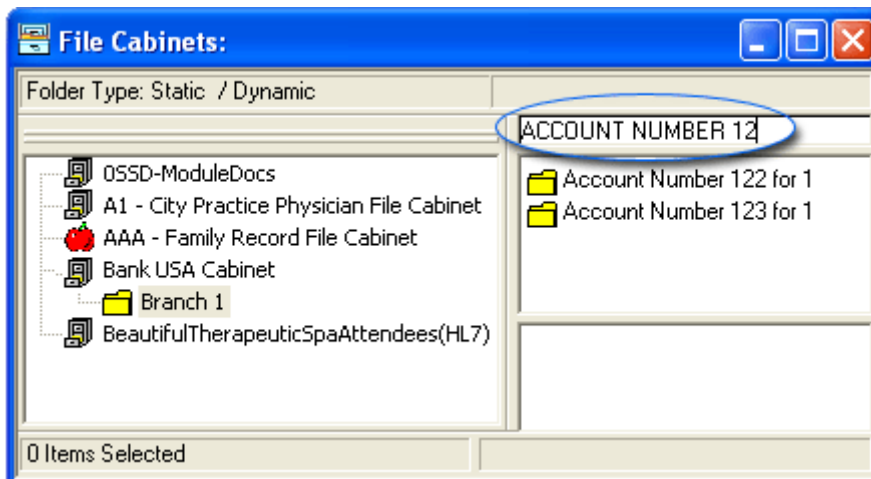
Classic File Cabinets Window

1. From the File Cabinets window, click a file cabinet to display its folder contents in the right pane.

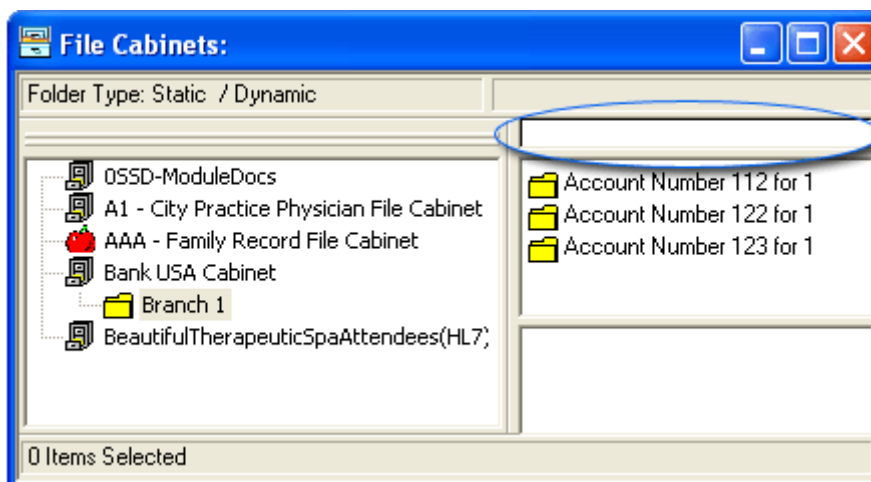


2. Type characters in the filter field to display only folders that begin with those characters. 150 characters are permitted.

For example, to view only checking account files for customers whose Account Numbers start with 12, you could type Account Number 12 in the filter field. OnBase displays only folders with matching Account Numbers.



If nothing is typed, all folders are displayed.



Note: Folders are filtered for the current session only. Once the File Cabinets window is closed, the filter field resets. See [Applying a Folder Template on page 240](#) for additional filtering capabilities.

Show Folder Locations

Use the **Show Folder Locations** option to view the folders where a document resides.

Note: Ensure you are using the advanced File Cabinets window. This option does not work with the classic File Cabinets window.

From a Document Search Results list or an open document, right-click and select **Show Folder Locations**. All folders where the document resides are displayed in the **Search Results** pane of the File Cabinets window. If the document resides in only one folder, the folder is opened automatically.

Keyword Considerations for Show Folder Locations

The **Show Folder Locations** command uses the document's Keyword Values to dynamically associate the folder to the document. Missing values will affect whether the correct folders are returned. In the following examples, suppose that two Keyword Types are used to dynamically link a document to a folder.

- If one value is left blank on the document, but not on the folder, the command returns the folder, even though the document doesn't reside in it.
- If one value is left blank on the folder, but not on the document, the command does not return the folder, even though the document dynamically resides in it.
- If a folder is indexed with multiple instances of a Keyword Type Group, the **Show Folder Locations** command will retrieve the folder only from documents indexed with values that are in the same instance of a Keyword Type Group on the folder.

This behavior occurs only if Keyword Types in the folder's Keyword Type Group are used to dynamically link the document to the folder, and if the Keyword Types are not in a Keyword Type Group on the document.

Working With Folder Keywords

Users with sufficient privileges can modify Keyword Values on either a folder or on a folder and its contents.

- To modify Keyword Values assigned to a folder, see page 250.
- To modify Keyword Values assigned to a folder and its contents, including child folders and documents, see page 252.

Caution: Modifying Keyword Values on a folder and/or its documents may change the contents of dynamic folders. Ensure you understand the implications of modifying the Keyword Values before proceeding.

Tip: To determine whether a folder is dynamic or static, open it. When a folder is opened, the header above the **Folder Tree** pane displays whether the folder's contents are **Static** or **Dynamic**. This information is also provided in the folder's properties under **Contents**. See [Folder Properties on page 265](#) for more information.

Modifying Keyword Values on a Folder Only

Do the following to modify Keyword Values on the folder only and not its contents.

1. Open the File Cabinets window.
2. Click a file cabinet to display its folder contents in the **Child Folders** pane.
3. From the **Child Folders** pane, select the folder and right-click.

4. Select **Keywords** to display the **Add/Modify Keywords** dialog box. The Keyword Values assigned to that folder are displayed.

Add / Modify Keywords

HR - Employee Records
Employee Record for JANE HARPER (SSN:123-45-6789)

Folder Date

Keywords

Name

Social Security #

Depending on your system's configuration, one or more values may be masked or read-only. Keyword Values may be read-only because another user or process is working with them, or because you lack privileges to modify them.

5. Modify the Keyword Values and click **Save**. For information about modifying Keyword Values, see the [Viewing and Modifying Keywords](#) topic in the Client help.
 - If your Folder Type is static, all documents that were in the folder will remain in the folder.
 - If your Folder Type is dynamic, only documents that contain Keyword Values assigned to the folder will remain in the folder. Your Keyword Value change may have added additional documents in the folder as well.
 - If your Folder Type is static and dynamic, all documents that were manually placed in the folder will remain in the folder. All documents that dynamically resided in the folder according to their Keyword Values will remain only if their Keyword Values are assigned to the folder. The Keyword Value change also may add documents to the folder.

Modifying Keyword Values on a Folder, Child Folders, and Documents

Throughout a business process, the Keyword Values associated with a folder or folder tree may change. To modify Keyword Values on all folders and documents in a folder tree, use the **Folder Contents | Keywords** right-click options.

You can modify only one Keyword Value at a time, which prevents folder contents from inheriting values for all of the folder's Keyword Types. If the folder uses Multi-Instance Keyword Type Groups, all values in a group can be modified simultaneously. For information about modifying Keyword Values in Multi-Instance Keyword Type Groups, see page 254.

Note: As a best practice, use the **Folder Contents | Keywords** options only when the folder and its contents use the same Keyword Types.

If you have insufficient privileges to modify Keyword Values on all of a folder's contents, values are modified only on child folders or documents you have privileges to modify. If you lack rights to modify Keyword Values on a folder, then no values are modified on the folder's contents.

To modify Keyword Values on a folder and its contents,

1. From the **File Cabinets** window, select the folder whose Keyword Values you want to modify.
2. Right-click and select one of the following options from the **Folder Contents | Keywords** menu:

Option	Description
Folders and Documents	Modifies the Keyword Values on the selected folder and any documents residing directly within that folder. Keyword Values on the folder's child folders and their documents are not modified.
Folders and Child Folders	Modifies the Keyword Values on the selected folder and its child folders. Keyword Values on documents residing within the folder or its child folders are not modified.
Folders, Child Folders, and Documents	Modifies the Keyword Values on the selected folder, its child folders, and any documents residing within the folder or its child folders.

The **Modify Folder Keywords** dialog box is displayed:

Modify Folder Keywords

Loan Applications
Loan Applications for Account #10001 at Branch 10

Keyword Type
Account Number

Keywords
Account Number 10001

Save Apply Cancel

3. Select the Keyword Type to modify from the **Keyword Type** drop-down list.
If the Keyword Type is in a Multi-Instance Keyword Type Group, you can modify values on all Keyword Types in the group.

Caution: Ensure you understand how modifying Multi-Instance Keyword Type Groups will affect Keyword values on folder contents. For more information, see [Modifying Multi-Instance Keyword Type Groups on page 254](#).

4. Type the new value for the folder and the contents you selected in step 2. The selected contents will have the same number of instances of the Keyword Type and the same values for each instance.
 - If you add another instance of the Keyword Type (by pressing F6), the new instance and its Keyword Value is added to the folder and selected contents. If you remove an instance of a Keyword Value, the Keyword Value is removed from the folder and selected contents.
 - If the selected Keyword Type is part of a Cascading Data Set, changing the Keyword Value will not update the child values that depend on it. For example, if you change the **State** value, then the **City** Keyword Type will retain its current value on the folder and its contents. Be sure to update any child values on folders and documents as needed.
5. Do one of the following:
 - Click **Save** to save the modified Keyword Values and close the **Modify Folder Keywords** dialog box.
 - Click **Apply** to save the modified Keyword Values and keep the **Modify Folder Keywords** dialog box open to modify additional Keyword Values.
 - Click **Cancel** to cancel any changes that have not been applied.

Note: If you lack rights to modify Keyword Values on a folder or document, OnBase displays a message stating that some Keyword Values could not be modified. Click **Show Details** to view folders or documents whose Keyword Values were not modified. If a folder name is displayed, then neither the folder nor its contents will reflect your changes.

Modifying Multi-Instance Keyword Type Groups

If the folder or its contents use a Multi-Instance Keyword Type Group, ensure you understand how Multi-Instance Keyword Type Groups are affected before using the **Folder Contents | Keywords** options.

The following examples describe how the **Folder Contents | Keywords** options are applied when folders or contents use Multi-Instance Keyword Type Groups. The tables display examples of folder and content Keyword Values before and after the Keyword Values are modified. These examples use **ID** and **Color** as Keyword Types.

Example 1: Content uses the same Multi-Instance Keyword Type Group as its folder

When modifying a Keyword Value in a Multi-Instance Keyword Type Group used by a folder and its content, the Keyword Values on the folder are duplicated exactly on the content. The content inherits the same number of instances and the same values for the Multi-Instance Keyword Type Group as on the folder. Below, the values of the keywords ID and Color used by the folder are modified, so the values of the keywords ID and Color used by the content are modified.

	Folder Keywords	Content Keywords
Before Modification	ID: 111 Color: Red	ID: 222 Color: Blue
After Modification	ID: 444 Color: Green	ID: 444 Color: Green

Caution: When a folder has fewer instances of a Multi-Instance Keyword Type Group than its content, the content is modified to only use the instances of the Multi-Instance Keyword Type Group used by the folder.

Below, the values of the keywords ID and Color used by the folder are modified, so the instances of the keywords ID and Color used by the content are replaced by the instance of the keywords ID and Color used by the folder.

	Folder Keywords	Content Keywords
Before Modification	ID: 111 Color: Red	ID: 222 Color: Blue
		ID: 333 Color: Yellow
After Modification	ID: 444 Color: Green	ID: 444 Color: Green

Example 2: Content uses a Multi-Instance Keyword Type Group that contains a Keyword Type used by its folder

When modifying a Keyword Value used by the folder that is in a Multi-Instance Keyword Type Group used by the content, each instance of that Keyword Value in the Multi-Instance Keyword Type Group used by the content is modified. Below, the value of the keyword ID used by the folder is modified, so the value of each instance of the keyword ID used by the content is also modified.

	Folder Keywords	Content Keywords
Before Modification	ID: 111	ID: 222 Color: Blue
		ID: 333 Color: Yellow
After Modification	ID: 444	ID: 444 Color: Blue
		ID: 444 Color: Yellow

Example 3: Content uses a Keyword Type that is contained in a Multi-Instance Keyword Type Group used by its folder

When modifying a Keyword Value in a Multi-Instance Keyword Type Group used by the folder, the Keyword Value used by the content is not modified. Below, the value of the keyword ID in the Multi-Instance Keyword Type Group used by the folder is modified, but the value of the keyword ID used by the content is not modified.

	Folder Keywords	Content Keywords
Before Modification	ID: 111 Color: Red	ID: 222
After Modification	ID: 444 Color: Green	ID: 222

Working with Folder Notes

Folder notes help you efficiently navigate folders and find specific information about their contents. Like notes on paper folders, folder notes in OnBase can provide additional information about a folder's contents, or they can act as bookmarks to let you quickly find a document. Different note colors can help you find important or related notes. By providing the information you need at a glance, folder notes can save you time otherwise spent searching through every document in a folder.

For example, suppose you have a case file that contains multiple subfolders. In OnBase, the case file folders can be set up as containers for folder notes, allowing you to comment on and add bookmarks to any document in any folder in the case file. Other users with permissions to view these notes can immediately see them upon opening the case file.

Depending on your privileges, you may be able to create the Folder Note Types on which folder notes are based. This privilege lets you create Folder Note Types from within the OnBase Client. When creating a Folder Note Type, you can decide whether other OnBase users may view or modify notes based on that type. You can also choose whether the notes will act as a bookmark.

- If you have privileges to create Folder Note Types, see [Creating Folder Note Types on page 258](#).
- To use folder notes and bookmarks, see [Using Notes and Bookmarks on Folders on page 261](#).

Note: Folder notes can be both viewed and created in both the OnBase Client (advanced File Cabinets window), Web Client, and Unity Client. Folder notes cannot be viewed or created from the classic File Cabinets window.

Folder Notes Requirements

Not all folders allow notes. To allow notes, a folder must satisfy one of the following requirements:

- The folder is based on a Folder Type configured as a parent for folder notes. These parent folders define the branch of the folder tree where notes are allowed.
- The folder resides within a parent folder for folder notes.

Folder notes are available only from the advanced File Cabinets window. For information about accessing the advanced File Cabinets window, see [Advanced File Cabinets Window on page 210](#).

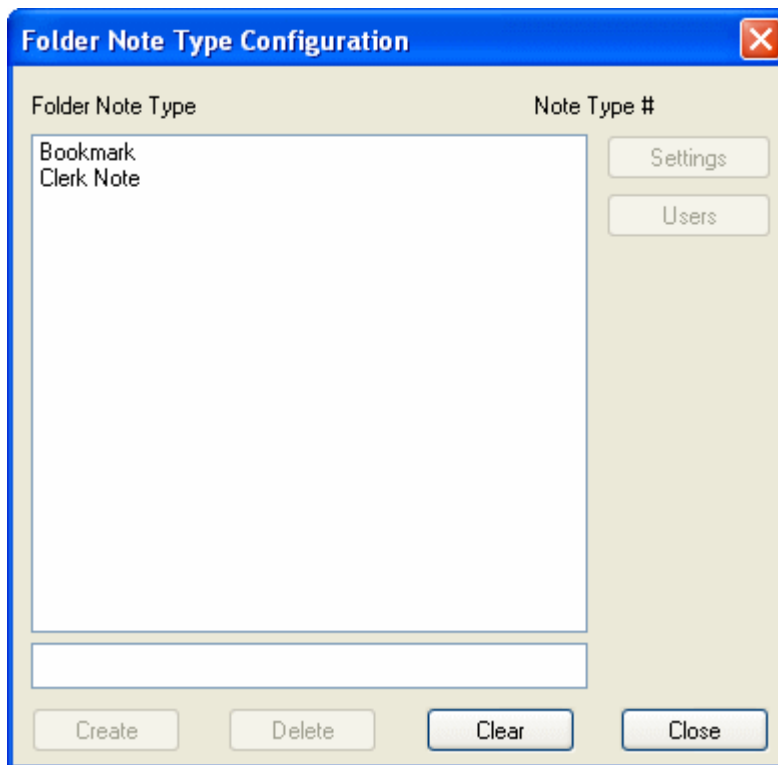
To work with folder notes, you must have sufficient privileges. Without Folder Note Type privileges, you cannot create or view folder notes.

Creating Folder Note Types

If you have sufficient privileges, you can create the Folder Note Types on which folder notes are based and assign privileges to them.

1. Open the advanced File Cabinets window.
2. Display the **Folder Notes** pane. On any pane's caption, right-click and select **Folder Notes**.
3. In the **Folder Notes** pane, right-click and select **Folder Note Types**.

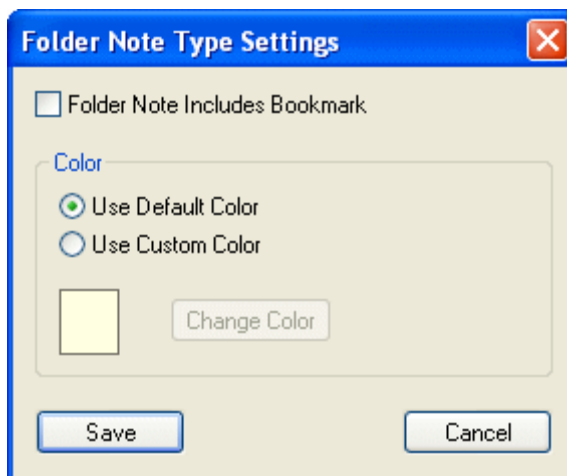
The **Folder Note Type Configuration** dialog box displays a list of all Folder Note Types that you either created or have rights to configure.



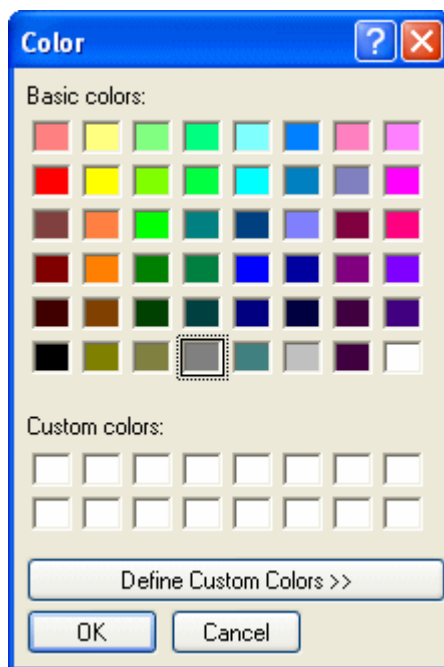
4. Type a unique name for the Folder Note Type in the field provided.
Use a naming convention that indicates whether the Folder Note Type is a bookmark.
5. Click **Create**.

Note: Folder Note Types must have unique names. If you receive an error indicating the name is already in use, but it is not displayed in the list, then another note administrator may have configured a Folder Note Type with that name without granting you access to it.

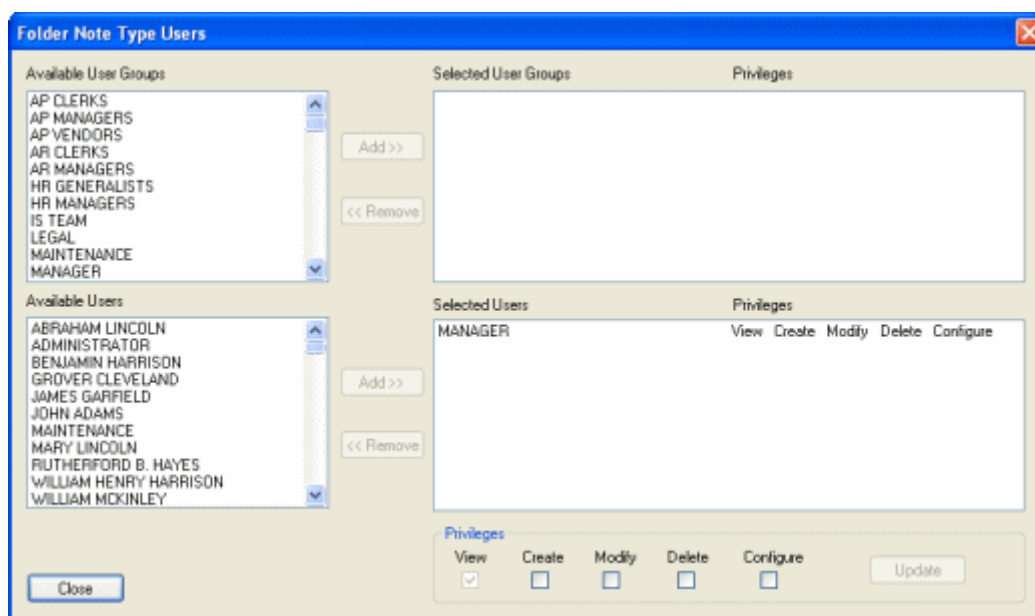
6. Ensure the Folder Note Type is selected and click **Settings**. The **Folder Note Type Settings** dialog box is displayed.



7. To make the Folder Note Type a bookmark, select **Folder Note Includes Bookmark**. Bookmarks include a **Go to page** button that users can click to display the bookmarked page.
8. To change the note color, select **Use Custom Color**. Different colors can help users understand the note's importance, function, or relationship to other notes.
 - a. Click **Change Color**. The **Color** dialog box is displayed.



- b. Select a color.
 - Either select a basic color or click **Define Custom Colors** to select another color.
 - If you define a custom color and click **Add to Custom Colors**, the color is added to the **Custom colors** palette, where you can apply it to other Folder Note Types.
 - Colors in the **Custom colors** palette remain available for the current session only. When you exit OnBase, the **Custom color** palette is cleared.
 - Choose a lighter color to contrast with the black note text. Black cannot be chosen because it would render notes unreadable.
- c. Click **OK**.
9. Click **Save**.
10. From the **Folder Note Type Configuration** dialog box, click **Users**. The **Folder Note Type Users** dialog box is displayed.



11. From the panes on the left, select the User Group or users who require privileges to this Folder Note Type. If multiple groups and users should have the same privileges, press **CTRL** as you click to make multiple selections.
12. Under **Privileges**, select the privileges to grant to the selected groups or users. The following privileges are available:

Privilege	Description
View	Users can see notes based on this Folder Note Type in the Folder Notes pane of the File Cabinets window. Because users must be able to see folder notes in order to work with them, this option is automatically applied to any users given Folder Note Type privileges.
Create	Users can create notes based on this Folder Note Type.

Privilege	Description
Modify	Users can edit the text in notes based on this Folder Note Type.
Delete	Users can delete notes based on this Folder Note Type.
Configure	<p>Users can view and edit the configuration of this Folder Note Type, provided that they also have sufficient privileges to configure Folder Note Types.</p> <hr/> <p>Note: The creator of a Folder Note Type can view and edit the Folder Note Type's configuration regardless of this privilege.</p> <hr/>

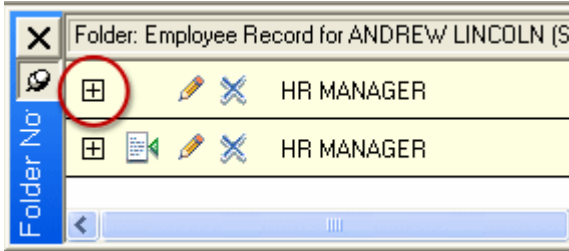
13. Click **Add**. The selected groups or users and their privileges are displayed in the panes on the right.
14. To modify a group or user's privileges:
 - a. Select the group or user from a pane on the right.
 - b. Select or clear privileges as needed.
 - c. Click **Update**.
15. Click **Close**.
16. Repeat steps 4–15 for each Folder Note Type needed.

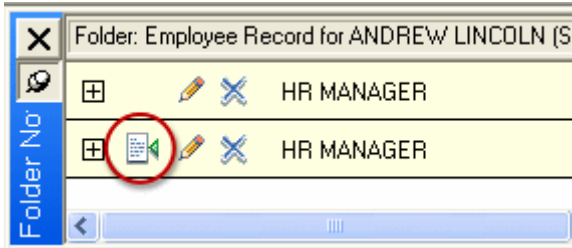
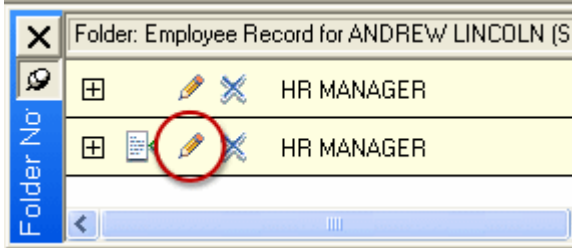
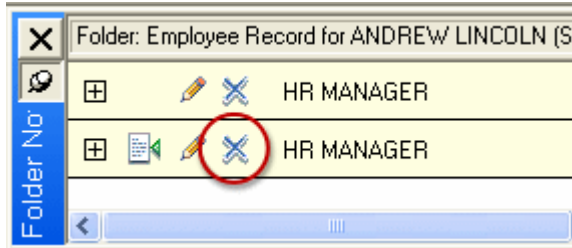
Using Notes and Bookmarks on Folders

Folder notes are displayed in the **Folder Notes** pane of the advanced File Cabinets window. Even if the **Folder Notes** pane is closed, it is automatically displayed when you open a folder that allows folder notes. When you view a folder that allows notes, the pane displays all notes residing on any folder in the same branch of the folder tree.

Note: Two parent folders for folder notes can exist within the same branch of the folder tree. In this scenario, the higher-level parent folder does not display notes residing on folders within the lower-level parent. The lower-level parent folder acts as an isolated container for the notes residing on it and its child folders. This configuration allows multiple sets of notes to exist within a single folder structure. For information about how your folder solution is configured, contact your system administrator.

If you have sufficient privileges, you can add, edit, or remove folder notes. See the following table for information about performing these tasks. If folder notes are unavailable from the folder you are viewing, ensure the [Folder Notes Requirements on page 257](#) are met.

Task	Procedure
Add Comments and Bookmarks to Folders	<ol style="list-style-type: none"> 1. Open the advanced File Cabinets window. 2. Open the folder where you want to add the note. 3. If you are adding a bookmark, navigate to the document and page that you want to bookmark. 4. If the Folder Notes pane is not displayed, right-click any pane's caption and select Folder Notes. 5. Right-click in the Folder Notes pane and select the type of note you want to add. If you are adding a bookmark, select the Note Type set up to bookmark documents. 6. Type the note text in the field provided. If you are adding a bookmark, the Auto-Name of the bookmarked document is already entered. 7. Click OK. The new note is added to the top of the list.
Open a Note	<p>To view a note's content and when it was created, click the + on the left side of the note.</p>  <p>Note: The date and time reflect the regional settings of the workstation from which the note was created.</p>

Task	Procedure
<p>View a Bookmarked Document</p>	<p>To quickly retrieve a bookmarked document, click the Go to Page button from the bookmark in the Folder Notes pane. This button is available only on bookmarks; it is not available on standard notes.</p>  <p>Note: If an error is displayed, the document may have been removed from the folder, deleted from OnBase, filtered from the documents list, or you may lack privileges to the document.</p>
<p>Edit Existing Notes</p>	<p>To edit a note, click the Edit button from the note in the Folder Notes pane. Edit the text as needed, and then click OK.</p> 
<p>Delete Notes</p>	<p>To delete a note, click the Delete button from the note in the Folder Notes pane. Click Yes when prompted.</p> 

Printing Folder Contents

The OnBase Client lets you print all of a folder's contents at one time, including documents residing in any child folders. To print all the documents in a folder and its child folders, complete the following steps:

1. From the File Cabinets window, select the folder you're printing.
2. Right-click and select **Folder Contents | Print**:
3. Select one of the following options:

Option	Description
Folder Documents	Prints all documents in the selected folder only.
Folder and Child Folder Documents	Prints all documents in the selected folder and in all of its child folders.

The **Print** dialog box is displayed.

4. Adjust the print options if prompted. Available options may vary depending on your system's setup.
For descriptions of OnBase printing options, see the Printing Documents topic in the OnBase Client help.
5. Click **OK**. OnBase prints all documents in the folder (and its child folders, if selected).

Note: Your privileges to print documents may be restricted by Document Type. If you need to print every document in a folder but cannot, contact your system administrator.

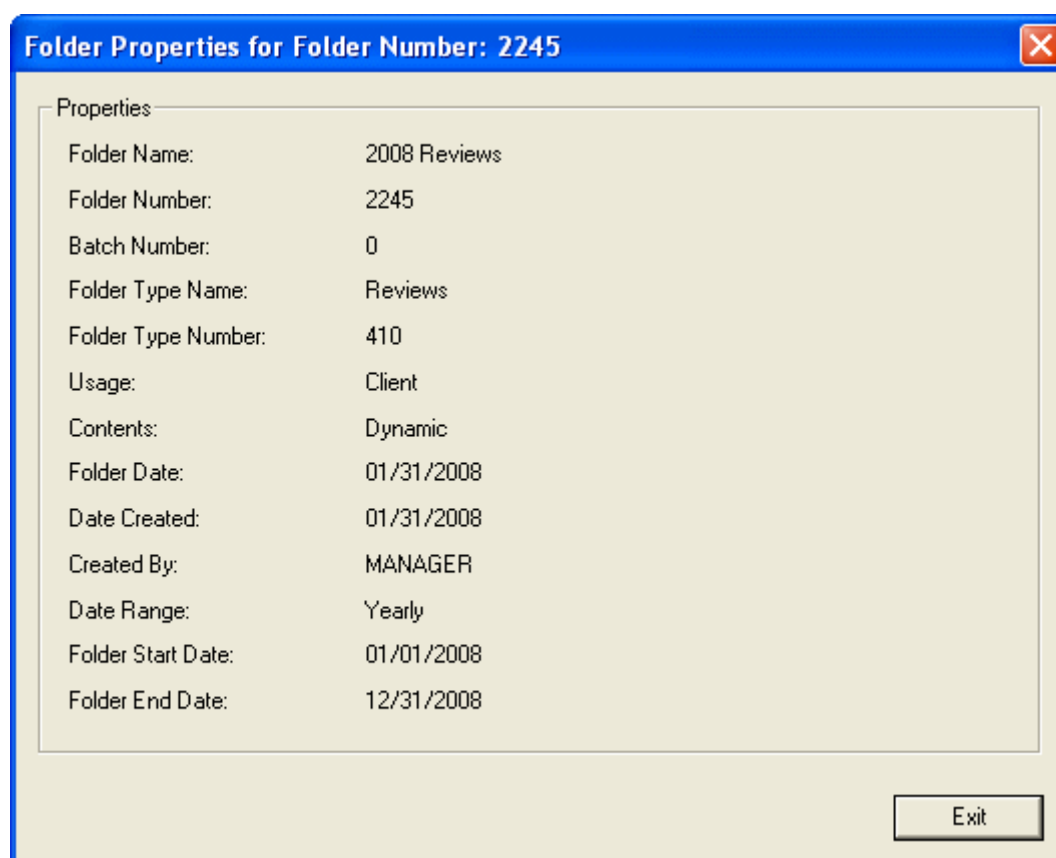
Folder Properties

The **Folder Properties** window provides information about a selected folder, including its content type, creation date, folder date, date range, and creator. Folder properties are available only to users with sufficient privileges.

1. Select the folder from the File Cabinets window.

If you are using the classic File Cabinets window, the folder must be selected in the **Child Folders** pane. To view the properties of a file cabinet, you must use the advanced File Cabinets window. File cabinets are displayed in the **Folder Tree** pane only, and you cannot access properties from the **Folder Tree** pane of the classic File Cabinet window.

2. Right-click and select **Properties**. The folder's properties are displayed.



Properties are described in the following table. For more information about your folder configuration, contact your system administrator.

Property	Description
Folder Name	The folder's Auto-Name.
Folder Number	The internal number assigned to the folder when it was created.

Property	Description
Batch Number	The number of the batch that imported the document that created the folder. Batches of documents are imported through OnBase's processing modules, such as COLD/ERM. If the folder was not created through a batch, this number is 0 .
Folder Type Name	The name of the Folder Type on which the folder is based.
Folder Type Number	The internal number of the Folder Type.
Usage	The usage type of the Folder Type.
Contents	The content type of the Folder Type. The content type determines whether the folder contains documents and how any documents are stored. Possible values include Folders Only , Static , Dynamic , Static/Dynamic , Static/Child Contents , and Dynamic Group . Static/Child Contents is displayed for folders that display the static contents of child folders.
Folder Date	The date assigned to the folder when it was created. The folder date can be modified to suit your business needs.
Date Created	The date the folder was created. This value cannot be modified.
Created By	The name of the user who created the folder or who ran the process that created the folder.
Date Range	The date range assigned to the Folder Type. Possible values include None , Daily , Weekly , Monthly , Quarterly , Biannually , and Yearly .
Folder Start Date	The start date of the folder's date range. This property has no value if the Folder Type has no date range.
Folder End Date	The end date of the folder's date range. This property has no value if the Folder Type has no date range.

Note: File cabinet properties display only the properties of the file cabinet, not the properties of the folders it contains.

Folder Options in the Client

For an overview of working with folders, see [Advanced File Cabinets Window on page 210](#) or [Classic File Cabinets Window on page 221](#).

Folder Right-Click Options and Available Features

The following right-click options may be available from the **Folder Tree** pane, from the **Child Folders** pane, or from a folder pop-up list:

- **New Folder** - See [Creating Folders in the Client on page 231](#).
- **Find Folder** - See [Folder Search on page 226](#).
- **Template** - See [Applying a Folder Template on page 240](#).
- **Filter Documents** - See [Applying Folder Filters on page 250](#).
- **Remove From Folder** - See [Removing Documents from Folders on page 242](#).
- [Adding and Removing Documents on page 240](#)
- **Keywords** - See [Working With Folder Keywords on page 250](#).
- **Delete** - See [Deleting Folders and Documents in a Folder on page 237](#).
- **Remove From List** - See [Working with Folder Pop-up Lists on page 223](#) or [Folder Search on page 226](#).
- **Open in New Window** (Advanced File Cabinets window only)
- **View Selected** - See [Open a Folder and View Documents on page 221](#).
- **Folder Contents** - Select to apply an action to all documents in the folder. The action doesn't apply to documents within child folders, unless otherwise specified. (For example, selecting **Folder Contents** | **Print** | **Folder and Child Folder Documents** allows you to print all documents in both the folder and its child folders. For printing information, see [Printing Folder Contents on page 264](#).)
- **Refresh** - Select to refresh a pane's contents.
- **Properties** - See [Folder Properties on page 265](#).

Note: Additional right-click items are either basic Client options or associated with a separately licensed module. For information about these items, see the Document Options and Right-Click menus in the general Client Help, or see the specific module's help files.
