OnBase® Foundation EP5

Web Client

Reference Guide

Includes:

User Guide

Foundation EP5

Copyright

Document Name .... Web Client
Department/Group .... Documentation
Revision Number .... Foundation EP5

OVERVIEW

OVERVIEW

This documentation covers the end-user functionality of the OnBase Web Client. For administrator-level configuration and installation, see the **Web Server** module reference guide.

Introduction

The Web Client is a Web-based document management system. You can use the Web Client to easily upload, organize, and retrieve documents.

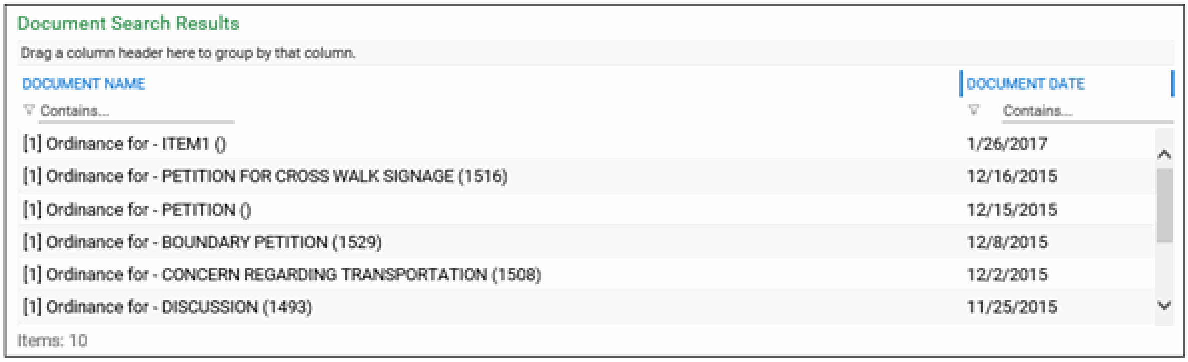
The Web Client's graphical tabbed interface provides a point-and-click environment for fast and simple navigation.

Search Capabilities

Document retrieval is easy and flexible using the Web Client. Using the Search functionality, you can search for documents in a variety of ways, depending upon your needs. The following table describes the available search options.

Search Type	Description
Document Retrieval	Search by Document Type Group, Document Type, Note Type, Keyword values, and/or Document Date.
Retrieve Specific Document	Retrieve Specific Document allows you to retrieve a document by its ID number. When documents are imported into OnBase, they are given a unique number. If you know the document ID number, you can search specifically for that document.
Custom Query	Custom Queries are predefined sets of search criteria that allow you to quickly access frequently retrieved documents.
Envelope	Set up your own private organizational system by creating Envelopes and adding documents to the Envelope. You can retrieve the documents later by simply clicking the Envelope.
Folder	Folders provide easy retrieval for documents that meet specified criteria when they are stored into the system.
Text or Note Search	Text and Note search tabs provide the ability to find documents based upon document or Note text.

Upon searching for a document through any one of the available Search Types, documents that meet the criteria display in a list.



When you open a document, it is displayed in a Document Viewer below the list. This allows you to quickly navigate through a list of documents, easily displaying one document after another.

Dynamic Work Space with Flexible User Interface

From the retrieval list or an open document, you can perform a variety of activities through right-click menus, toolbars, and shortcut keys. You can:

- Show or hide toolbars.
- Navigate documents using toolbar buttons, shortcuts, or thumbnails.
- Rotate and resize documents.
- Expand or resize windows.
- Open documents in multiple windows.
- Lock columns or rows of text in large documents for easy review.

For more information, see Document Options and Right-Click Menus on page 57.

Note: Depending on how the Web Client is configured, some toolbars and right-click options may be unavailable.

User Groups and Rights Control User Access to Features

The features, functions, and documents that a user is able to see or access depend on the user's Privileges and Product Rights, as well as the Web Client configuration and Licensing.

Keyword Functionality Increases Document Management Efficiency

In the OnBase Web Client, you can:

- View and edit Keyword Values.
- Use AutoFill Keyword Sets to increase indexing efficiency.

- Add more than one value to Keyword Types applied to documents. With Multi-Instance Keyword Groups, you can also preserve the integrity of records on documents with multiple Keyword Values, enabling more efficient retrieval to obtain the correct document quickly.
- Re-index documents to assign them to different Document Types, and make any associated changes to the Keyword Values or Document Dates.

Add Notes or Annotations to Documents

You can add Notes and custom Annotations to documents. Note and Annotation text is searchable for retrieval purposes.

Redact Areas of Documents

Create redactions on documents that need to have certain areas hidden from view.

Mail Documents from within the System

Email documents through your own email system as attachments to messages.

Note: The specific options available depend on the Document Type, its file format, and your user rights. Document Type Groups, Document Types, Custom Queries, and Folder Types are set up by your system administrator.

Logging On

To access documents through the Web Client, you must first log on to OnBase.

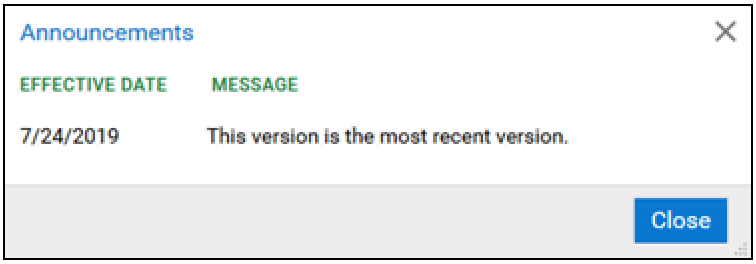
Note: If the **Selectable** option is enabled in the Web Application Management Console, the Web Server detects which browser is being used, and then configures the client type accordingly (to either ActiveX or HTML). Only Internet Explorer defaults to ActiveX, allowing you to choose HTML if necessary.

1. From the login screen, type your user name in the **User name** field.
2. Type your password in the **Password** field.
3. If the **Language** field is enabled, select the language you want from the drop-down list.
4. Click **Login**. The Web interface is displayed.

Note: If you have a 64-bit browser, the Web Client logs on in HTML mode.

Login Banner

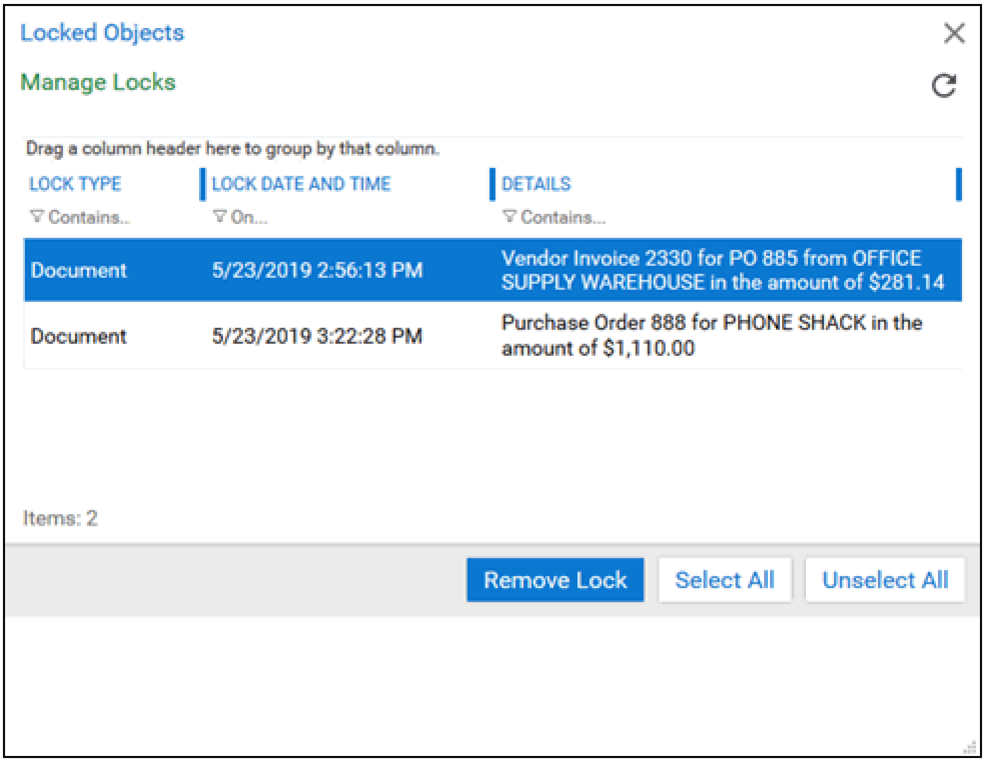
A login banner may be displayed after you log on. Login banners are system notifications containing important announcements. The system administrator configures the content of login banners and the number of days they are displayed.



Click **Close** to continue to the Web Client.

Locked Objects Notification

If there are any objects locked by your user account, the **Locked Objects** dialog box is displayed after you log on.



Locks can occur if you have documents open when OnBase closes unexpectedly. If you do not clear the locks, other users will only be able to open read-only copies of the locked document.

To clear locked objects:

1. From the list of locked objects, select the documents you want to unlock.
   - To select multiple documents, hold **Shift** or **Ctrl** while clicking the documents in the list.
   - To select all documents in the list, click **Select All**.
   - To deselect all documents in the list, click **Unselect All**.
2. Click **Remove Lock** to remove the locks from the selected documents.
3. Click the X in the upper right to close the **Locked Objects** dialog box.

Database Mismatch Message

If there is a mismatch of the database, this message is displayed:

> **The server encountered an error when connecting to the database. If this problem persists, you should contact your administrator for resolution.**

You will need to contact your system administrator who can fix the mismatch so you can log in to the Web Client.

ActiveX Control Message

If ActiveX controls fail to load, this message is displayed:

> **Failed to load Popup Blocker Assistant ActiveX control**.

This message typically displays when you need to have new ActiveX controls installed on your machine. Click **OK** and then contact your system administrator to install the most recent controls.

Concurrent Client Licenses Message

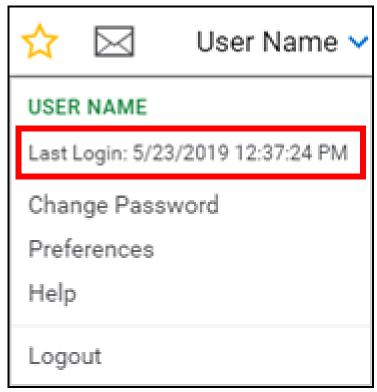
If there are not enough concurrent licenses for Web Client, this message is displayed:

> **You have exceeded the concurrent licensing for product: Concurrent Client**
> **A temporary license has been granted. Please report this licensing overage to your system administrator.**

Contact your system administrator so they can procure enough licenses for future use.

Last Login

Once in the Web Client, you can view the date and time you last logged in. Select the drop-down arrow next to your user name.



The information from your last login is shown below your user name. If this is your first time logging in, the word **Now** is displayed.

Session Interruption

Your Web Client session may be interrupted under certain circumstances. See the following sections for more information:

- Session Timeout on page 6
- Authentication Required on page 6

Session Timeout

Depending on your configuration, you may be prompted with the following message after a period of inactivity:

Your session appears to be inactive. You will be logged out in 30 seconds.

In order to stay logged on, you must either click **Stay Logged In** or press the **Enter** key. If the **Stay Logged In** button is not activated within the allotted time, you are logged off of the Web Client.

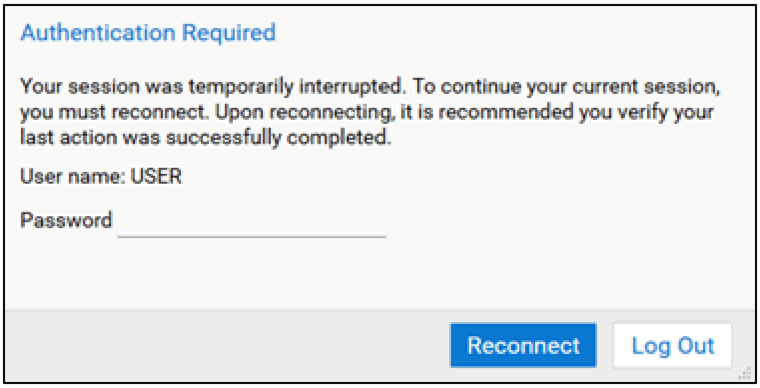
Caution: In Firefox, the message may not be displayed if the Web Client is minimized behind another application that is maximized. In this case, you may be silently logged off when the timeout threshold is reached. Ensure that there are no maximized applications in front of the Web Client.

Authentication Required

Your Web Client session may be interrupted and you may be required to re-authenticate your connection to OnBase. This can happen for several reasons, such as if you are required to reset your password, or if the network connection is interrupted.

Depending on your solution, you may be able to reconnect to OnBase and resume your session, or you may be required to log in again and begin a new session.

If you are allowed to resume your session, the **Authentication Required** dialog box is displayed:

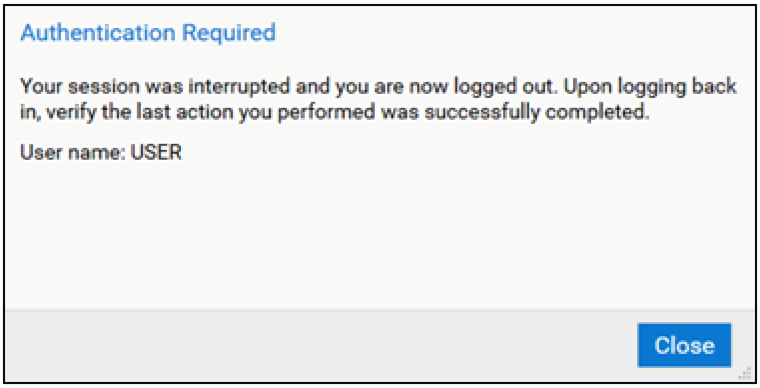


Note: If your solution allows you to automatically log in to the Web Client, the **Password** field is not included.

Do one of the following:

- Enter your OnBase password (if required) and click **Reconnect** to resume your current session. You are returned to the Web Client context in which you were previously working. It is recommended that you verify that your last action before the interruption was successfully completed.
- Click **Log Out** to end your current session and return to the Web Client login page.

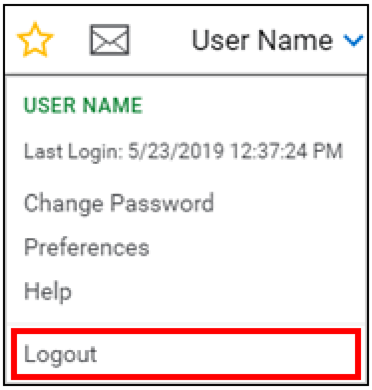
If you are required to begin a new session, the following **Authentication Required** dialog box is displayed:



Click **Close** to return to the Web Client login page, and re-enter your user name and password if required. It is recommended that you verify that your last action before the interruption was successfully completed.

Logging Off - Exit Button

When you are finished working, select the drop-down arrow next to your user name.



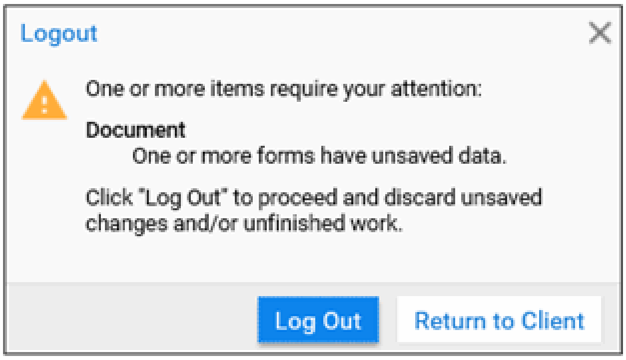
Select **Logout**. Depending on how your system is configured, logging off may either return you to the URL where you logged on or close your Web browser.

Remembering the Browser Window Size and Position

If you moved or resized your browser window during your session, the Web Client automatically remembers the window size and position the next time you log on. In order for the window size and position to be remembered, browser cookies must be enabled.

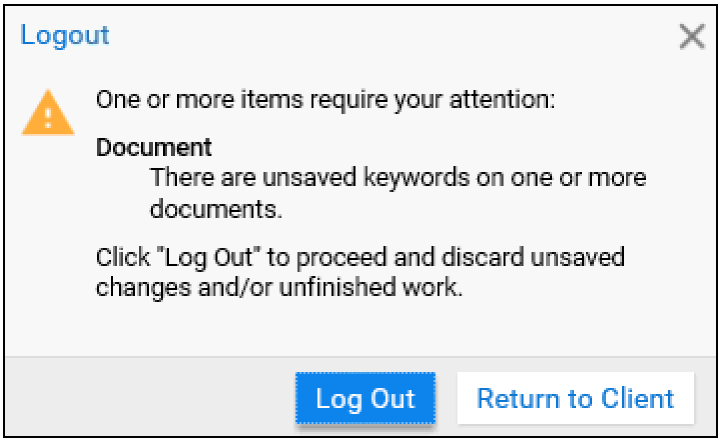
Exceptions When Logging Off

If you have an incomplete form, an exception is displayed when you log off.



Either click **Log Out** to continue to log out, or click **Return to Client** to complete and submit your form.

If you have unsaved keywords, an exception is displayed when you log off.



Click **Return to Client** to save your keywords and log off.

Definitions

The following terms are associated with the Web Client module and are used throughout the documentation.

Annotations

Annotations are similar to OnBase notes. An annotation can be used to call attention to items in a document, it can contain a message, and it may be represented by an icon. However, annotations also allow you to call attention to a portion of the document with special markings, such as arrows, highlights, and ellipses.

Note: If you are viewing a document that has been locked by Records Management, in the ActiveX environment, the Annotations toolbar is selectable, but does not perform any functions. In the HTML environment, the Annotations toolbar is locked and cannot be used.

When enabled, the Notes toolbar displays annotation-related notes along the bottom of the viewer window.

Characteristics such as color and title are predefined when the note is configured for use. Several types of annotations can be created:

- Arrows typically point to a specific item.
- Ellipses typically circle an area of interest.
- Overlapping Text allows user-defined text to be displayed over the document.
- Highlights place a translucent color over the area of interest.

Redaction annotations can be used to produce an entirely new image document, in which the annotation is permanently applied to the document.

Note: The Arrow, Ellipse, and Overlapped Text note types are not available for use on all documents. Availability depends on the file format of the document.

AutoFill Keyword Set

AutoFill Keyword Sets are used to automate and standardize data entry. The following apply to AutoFill keyword sets:

- An AutoFill Keyword Set is a configuration of Keyword Types that includes a Primary Keyword Type and one or more Secondary Keyword Types.
- If an AutoFill Keyword Set is assigned to a Document Type, each set of Keyword Values (the Primary Keyword Value and its corresponding Secondary Keyword Values) can be considered an instance.
- A value entered into the Primary Keyword Type field during indexing of a document triggers the population of the remaining Secondary Keyword Types.

When applied to Document Types, AutoFill Keyword Sets increase the speed and accuracy of indexing, especially when indexing large volumes of documents.

AutoFill Keyword Set Instance

An AutoFill Keyword Set instance is a Primary Keyword Value and its corresponding Secondary Keyword Values on a document.

- A document may contain one or more instances, depending upon its configuration.
- Many instances can compose the total AutoFill Keyword Set.

Cascading Data Sets

A Cascading Data Set is a set of Keyword Types where the values available in a drop-down list for one Keyword Type vary depending on the value selected from the drop-down list for the previous Keyword Type on the document or folder.

These Keyword Types are arranged to show this parent/child relationship. For example, if State, County, and City are listed as Keyword Types and displayed in that order, then the available County values depend on the selected State, and the available City values depend on the selected County.

Changing a parent Keyword Value does not update the child values that depend on it. For example, if you change the State after selecting the County, then the County retains its original value and is not automatically updated to reflect the new State.

Note: OnBase cannot validate Keyword lengths for externally filled Keyword data sets, but externally filled Keyword data sets must still respect the configured Keyword lengths of the Keyword Types in OnBase.

Cross-Reference

A cross-reference is a relationship between a Document Type and one or more other Document Type(s). This allows you to view related documents by double-clicking on a word or a document region (an account number, for example).

Cross-referencing aids research by making all related documents readily available. For example, a vendor invoice could be configured to allow you to double-click the invoice to retrieve the corresponding purchase order. The purchase order could then in turn be cross-referenced with a corresponding requisition form.

HTML-Based Documents

HTML-based documents can be configured with buttons that will initiate a cross-reference or a Custom Query.

Custom Queries

Custom Queries allow you to quickly access your most frequently retrieved documents by conducting pre-defined searches.

Document

A document is a piece of information that your organization has chosen to store electronically in the system. Letters, contracts, scanned images of contracts, photographs, and email messages are all examples of documents.

Documents can be retrieved based on Keyword Values that are associated with the document. Storing documents in the system eliminates the need for paper documents. Documents can be revised, viewed, annotated, and tracked within the system.

Document Type

Each document that is brought into the system is assigned to a Document Type. Document Types group together documents with similar characteristics. For example, a Document Type of **AP - PACKING SLIPS** might be used to define image files of packing slips. Document Types allow you to work with groups of documents rather than individual documents. For example, you can limit your document searches to only those documents of a certain Document Type.

Document Handle

A document handle is a unique number that identifies a document. The document handle is assigned to a document when it enters the system.

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.

Envelope

You can place any documents you want into an envelope, regardless of whether they have anything in common. When an envelope is opened, it displays a list of documents that have been placed in it.

Envelopes provide you with a way to group documents together for easy access. Only the envelope’s creator can view that envelope. Envelopes are an alternate way to retrieve documents; the documents remain accessible through standard document retrieval methods.

- Because the entry in an envelope is actually a pointer to the document stored in its Document Type Group, removing a document from an envelope will not delete the document from OnBase.
- Adding documents to envelopes does not duplicate the document in OnBase.
- There is no limit to the amount or type of documents that can be placed in one envelope.
- You can add a document to more than one envelope.

External Text Search

The External Text Search function allows you to search for text across text-based documents of a selected Document Type. Text-based documents include, but are not limited to, all documents with the following formats:

- Text Report Format
- Dynamic Document
- XML
- AFP
- PCL

See also: Internal Text Search on page 15.

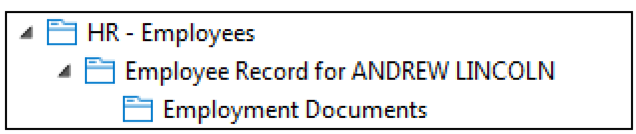
Folder Definition

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.
- 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.

Internal Text Search

The Internal Text Search function allows you to locate search text in an open text-based document, including PCL and other plain text documents or ASCII file formats.

See also: External Text Search on page 13.

Keyword Data Sets

Keyword Data Sets are used to limit the values that appear in a Keyword Type drop-down list. When a Keyword Data Set has been configured, users will be able to select values contained in the Keyword Data Set when indexing documents with that Keyword Type. This helps users maintain consistency when indexing documents.

Note: OnBase cannot validate Keyword lengths for externally filled Keyword data sets, but externally filled Keyword data sets must still respect the configured Keyword lengths of the Keyword Types in OnBase.

Keyword Types and Keyword Values

Keyword Types and Keyword Values provide the ability to assign descriptions to documents. Effective indexing and classification of Document Types is essential for efficient document management and retrieval.

The system administrator assigns all Keyword Types to documents in your system.

Keyword Types

Every Document Type can be configured to have associated Keyword Types. For example, a **Check Images** Document Type may have Keyword Types such as **Account #**, **Check Serial #**, and **Amount** assigned to it.

A Keyword Type may be used for many different types of documents. For example, you can use a Keyword Type **Amount** for almost any Document Type for which you need to store an amount.

The system administrator sets up Keyword Types for each Document Type.

Note: Some Keywords Types are only available to the user upon indexing, re-indexing, Custom Queries, or Workflow. See your system administrator for details regarding Keyword Display Options.

Note: System Keyword Types supplied by OnBase cannot be deleted.

Keyword Values

When a document is indexed, its Keyword Types are assigned Keyword Values. A Keyword Value is the specific value that helps to identify documents in the system.

- Some Keyword Types require their values to be a specific format, such as a date, a number, or a currency value.

Note: Currency keyword values are limited to 15 characters in length.

- Some Keyword Types will have default values assigned to them, so when you import a document into the system, the default value is displayed in the Keyword Type field.
- Some Keyword Values display automatically on an open document.

Note: Depending on your system's configuration, you may be able to change the currency format for Keyword Types that use specific currency formats. If a Keyword Type uses specific currency formatting, a currency button is displayed to the right of the Keyword Type field. Click the button to display a list of available currency formats.

Note: Depending on your system's configuration, certain Keyword Types may be masked or appear as read-only at the Document Type level.

Note: Depending on your system's configuration, certain Keyword Types may be subject to value validation rules.

Keyword Type Groups

A Keyword Type Group is a collection of Keyword Types assigned as a whole to a Document Type or Folder Type.

Each Keyword Type in the Keyword Type Group can have only one instance (unlike Keywords that are not part of a Keyword Type Group, which can contain multiple instances with different values). To allow multiple instances of the Keyword Types contained within a Keyword Type Group, the Keyword Type Group must be a Multi-Instance Keyword Type Group. Multi-Instance Keyword Type Groups can contain multiple instances of a Keyword Type Group, much like there can be multiple instances of a standard Keyword. Each instance of a Multi-Instance Keyword Type Group contains its own instances of the Keyword Types contained within the group, which can have different values between Keyword Type Groups.

For information about using Keyword Type Groups on folders, see the section on working with folder keywords.

See your system administrator for information regarding your system setup related to Keyword Types.

Multi-Instance Keyword Type Groups

A Multi-Instance Keyword Type Group can be duplicated on a document so that one or more Keyword Type Groups can be created for the document.

A Multi-Instance Keyword Type Group respects the relationships among Keyword Types within a Keyword Type Group. This is especially important when documents are indexed with more than one record of information.

Multi-Instance Keyword Type Groups are displayed in an expanded state when OnBase is in an indexing mode. Multi-Instance Keyword Type Groups are also displayed in an expanded state when creating a new folder in the OnBase Client. Other instances can be configured to display the Keyword Values in the Keyword Type Groups either expanded or collapsed.

Note

A note is an explanation or instruction that can be attached to text, OLE, HTML-based, or image documents. Notes are used to draw attention to content, clarify or explain items, or identify the current state of the document.

You can place a note on a text, HTML-based, or image document. Notes remain associated with the page on which they were created, unless they were otherwise configured. For example, if the note was created on page 1 of a two-page document, the note icon appears only on page 1.

Notes added to OLE documents stay attached to the toolbar or float in the location to which they were moved.

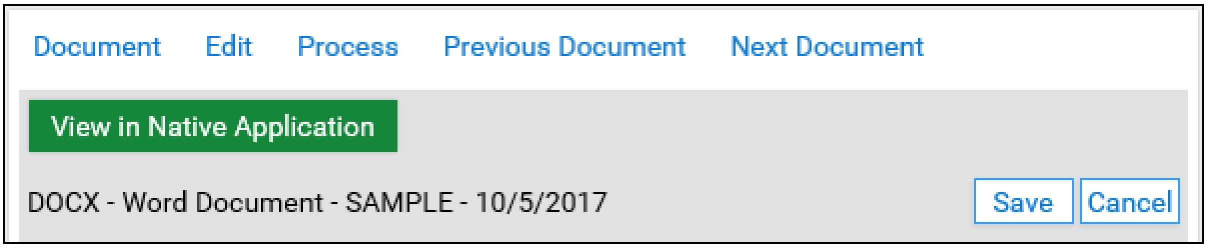
Notes are displayed on all renditions of a document.

Note: A note has a maximum character length of 250 characters. If a note appears truncated, it is because the note has been configured to use variable text. The variable text is causing the note to exceed the maximum character length of 250 characters. If you are experiencing truncated notes, contact your system administrator.

OLE Documents

OLE is short for Object Linking and Embedding, a standard that allows documents created with one application to be linked or embedded in another application. OLE documents, such as Microsoft Word documents, retain their original format and links to the applications that created them.

When you open an OLE document in OnBase, the document is displayed in a viewer based on the document's source application. If the **View in Native Application** button is available, you can view documents using the Office Business Application. Note that if you are viewing an older document (.doc instead of .docx), the button displays on a yellow background indicating that the document is read-only.

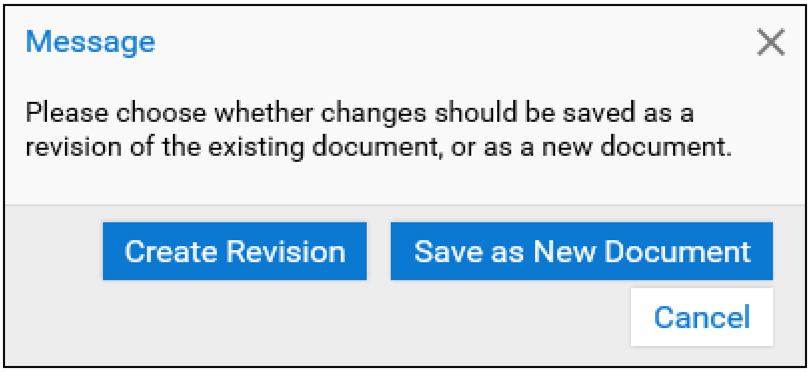


The document's right-click options are specific to the source application. OnBase options can be accessed by right-clicking the document in a Document Search Results list.

For open OLE documents, you can access OnBase options from the **Document** and **Edit** menus.

To modify, revise, re-index, add notes to, and find cross-references for Office documents opened from the OnBase Web Client, use the Office Business Application for the version of Microsoft Office you have installed on your system.

When you have modified a revisable OLE document, upon saving in the source application, a dialog box is displayed asking whether you want to save the changes as a revision of the existing document, or create a new document.



Select the desired option, or click **Cancel** to exit the dialog box.

Overlay

An Overlay is an image document that can be displayed, printed, or faxed over a text or image document. For example, text documents containing purchase order information might use an image of a purchase order form as an overlay.

Staples

Documents can be attached to each other using the **Staple** and **Back Stable** Note Types. In most cases, staples are used to associate documents that have an established logical relationship. For example, documents related to a single customer may be stapled together or an invoice and its associated purchase order may be stapled together. Logical relationships between documents can be established by a user but are not required by OnBase to staple documents.

When documents are stapled, a Staple icon is placed on each document. Staple icons can be used to directly open associated documents. Since staples only create a link between documents, the stapled documents remain separate.

Staple icons can also be used to open the staple's note, which displays creation information and allows the addition of customized text.

When using staples, consider the following:

- The Staple icon and staple note are placed on the primary document, and a Back Staple icon and back staple note are placed on secondary documents.
- For documents consisting of multiple revisions, Staple icons appear on all revisions. When viewing a stapled document from any revision of an open document, the latest available revision of the stapled document is displayed.
-
- When printing a document using the HTML Web Client, Staple icons will not be printed when selecting **Note Icon/Annotation on Document** in the **Print Settings**.
- Not all file formats support using staples. See your system administrator to verify whether your document supports using staples.

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

Text Documents

Text-based documents have special features available for selecting or searching text. Examples of text-based documents in the system are ASCII files, PCL documents, text renditions of image documents, text-based documents such as checking statements that have been imported into the system, and system reports or verification reports created during processing.

All text documents in the system are read-only, thus the contents of the text documents themselves can never be modified or deleted. The associated attributes however, such as Keyword Values, notes, file types or Document Types, can be modified by a user with the appropriate rights. Users with Delete document rights can delete the whole text document, not delete its contents.

Text documents have specific buttons, which are different from the buttons and options available to image documents.

User

Each person using the system is known as a user. When a user logs onto the system, he or she supplies a unique user name and a password.

This allows greater flexibility for system operation. For example, each user can configure his or her workstation settings with personal preferences.

User Group

A system User Group is similar in concept to a user group on your network. User Groups are granted rights to access system functionality.

Access to various resources, such as scan queues and Document Types are controlled by User Group rights. A user can be a member of multiple User Groups, in which case the user has access to the sum of all functionality granted for each group.

User Groups provide easier administration because new users inherit the access rights of the group to which they are assigned.

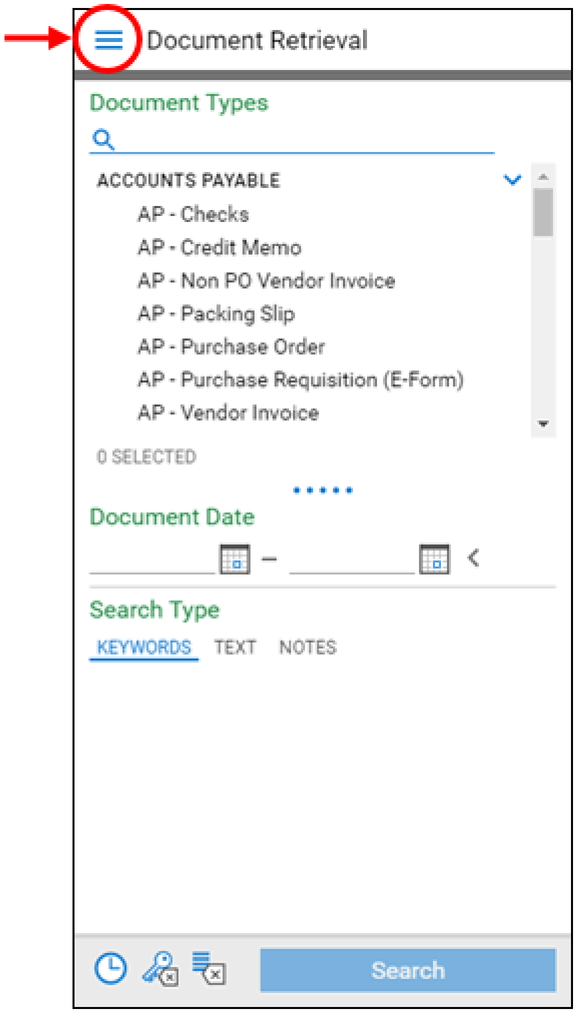
Using the Web Client - Overview

This section provides information on all of the navigational tools available in the Web Client. See Web Client Keyboard Shortcuts on page 34 for information about the available keyboard shortcuts in the Web Client. See Toolbars in the Web Client on page 109 for additional information on functionality provided by toolbar buttons.

Getting Around the Web Client

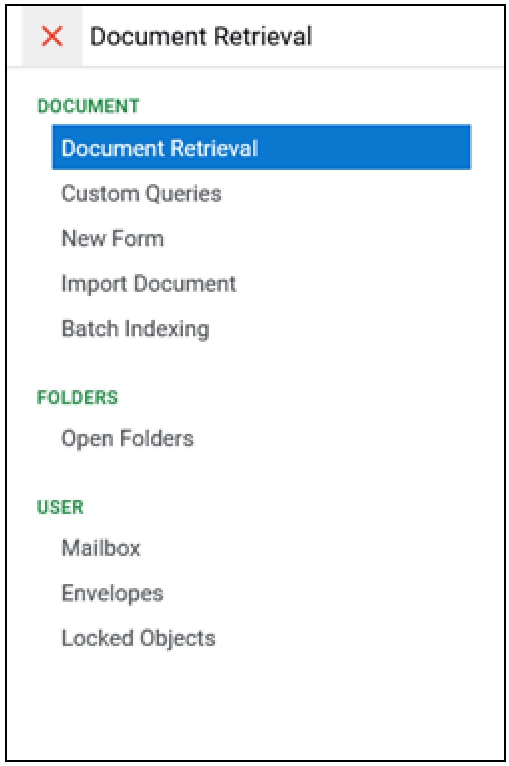
When the Web Client is launched, the Document Retrieval layout is typically displayed in the Navigation panel by default. Depending on your system's configuration, a different layout may be displayed upon launch.

Options that are displayed in the Navigation Panel are selected using the Main Menu button. The Main Menu button allows you to rapidly switch from one task to another. The default position of the Main Menu button is on the left side of the screen.

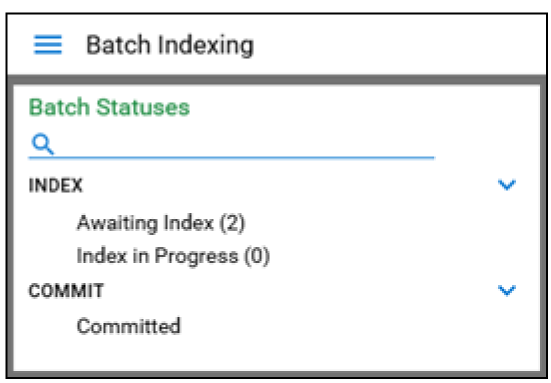


When the Main Menu button is selected, the menu is displayed, listing the options available in the Web Client. You can close the Main Menu by either clicking the X on the Main Menu button or clicking anywhere outside of the menu.

Note: Depending on your access privileges and product rights, you may have other options than those listed in the following illustration.



When you select an option from the Main Menu, the heading and content of the Navigation panel changes to reflect your selection.



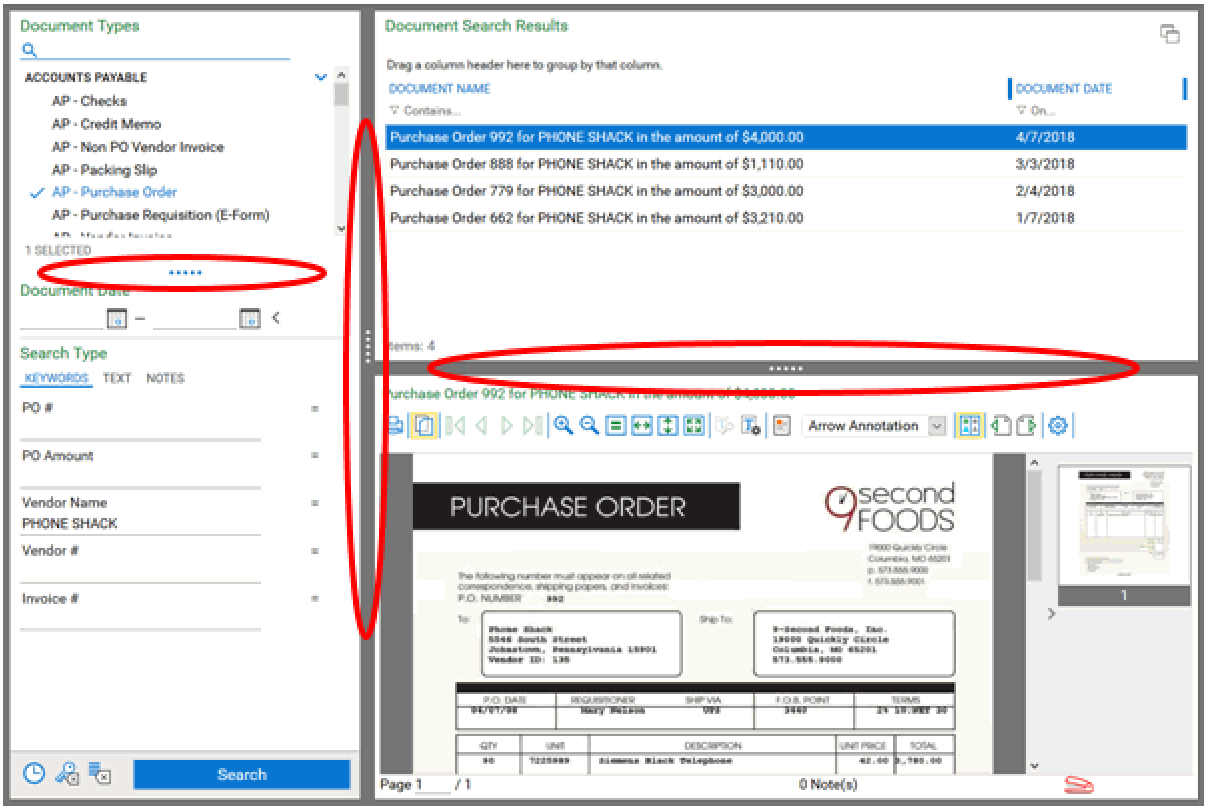
The following table lists options that are included in the Main Menu. You may have additional options if your OnBase solution includes those modules. See your system administrator or first line of support for more information on additional modules.

Option	Description
Document	Retrieve documents, perform Custom Queries, create new forms, import and index documents, view documents that have been checked out, and view items in the briefcase. (Briefcase is available only if EDM Briefcase has been implemented.)
Folders	Open folders and view any documents within folders.
User	View the user's mailbox, envelopes, any locked objects, and the import history for the user.
Admin	Perform administrative duties on users, web diagnostics, and logging profiles. This is available only if you are an administrator of the Web Client.

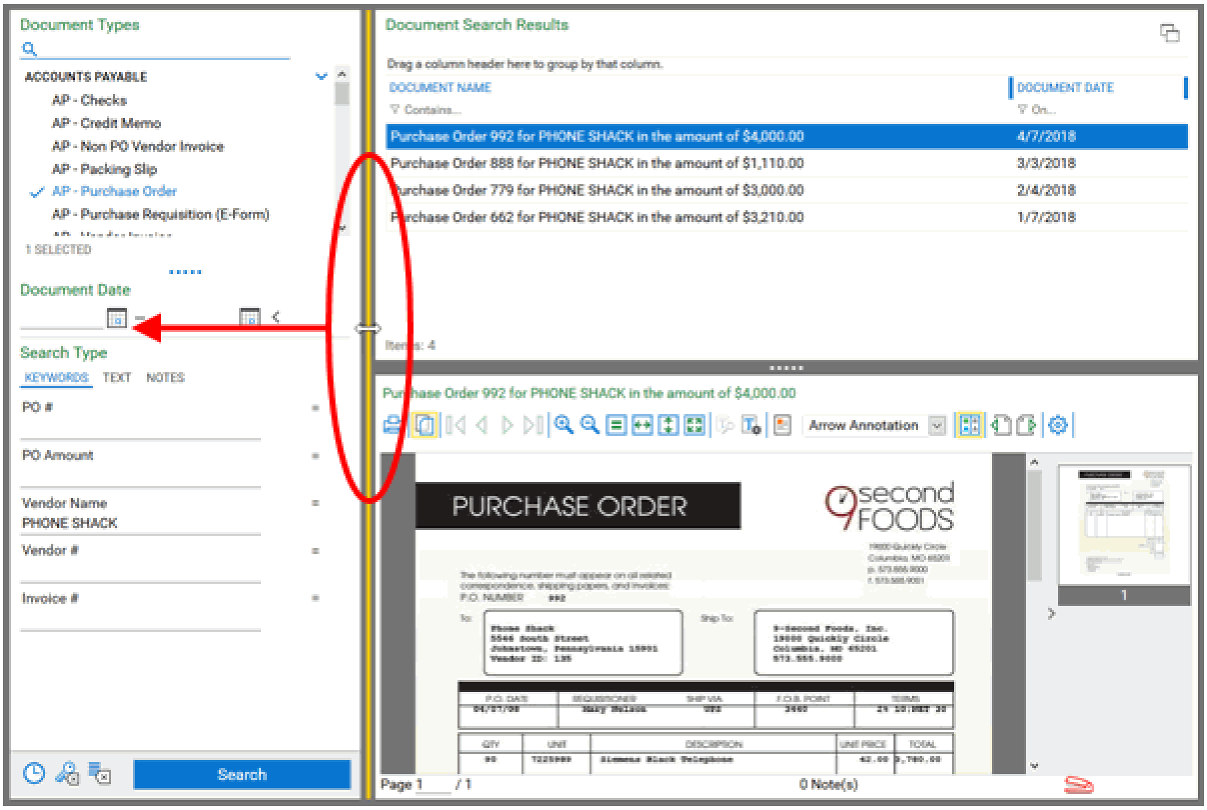
Resizing the Navigation Panel and Document Search Results List

You can resize sections of the Navigation Panel and **Document Search Results** list by dragging the borders between the sections. You can perform the following actions:

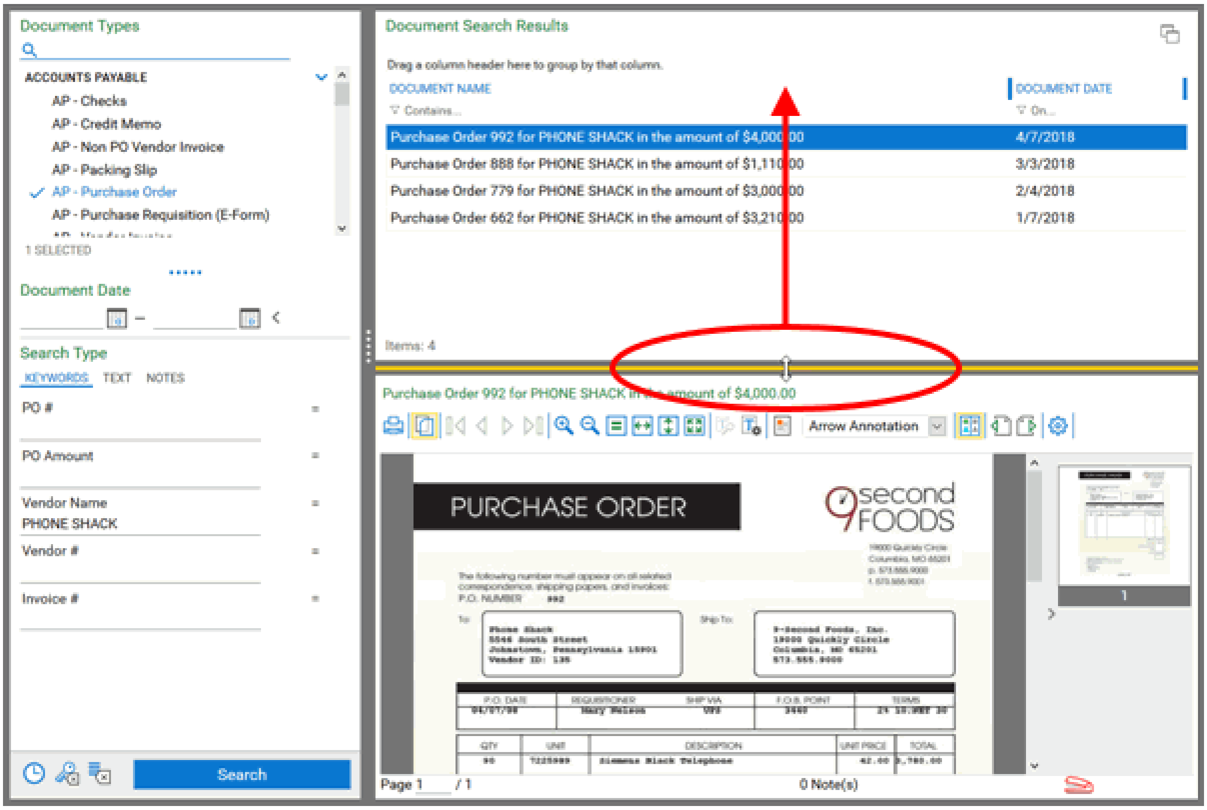
- To resize the Navigation Panel and **Document Search Results** list, click and drag the handles between elements to the preferred width or height.



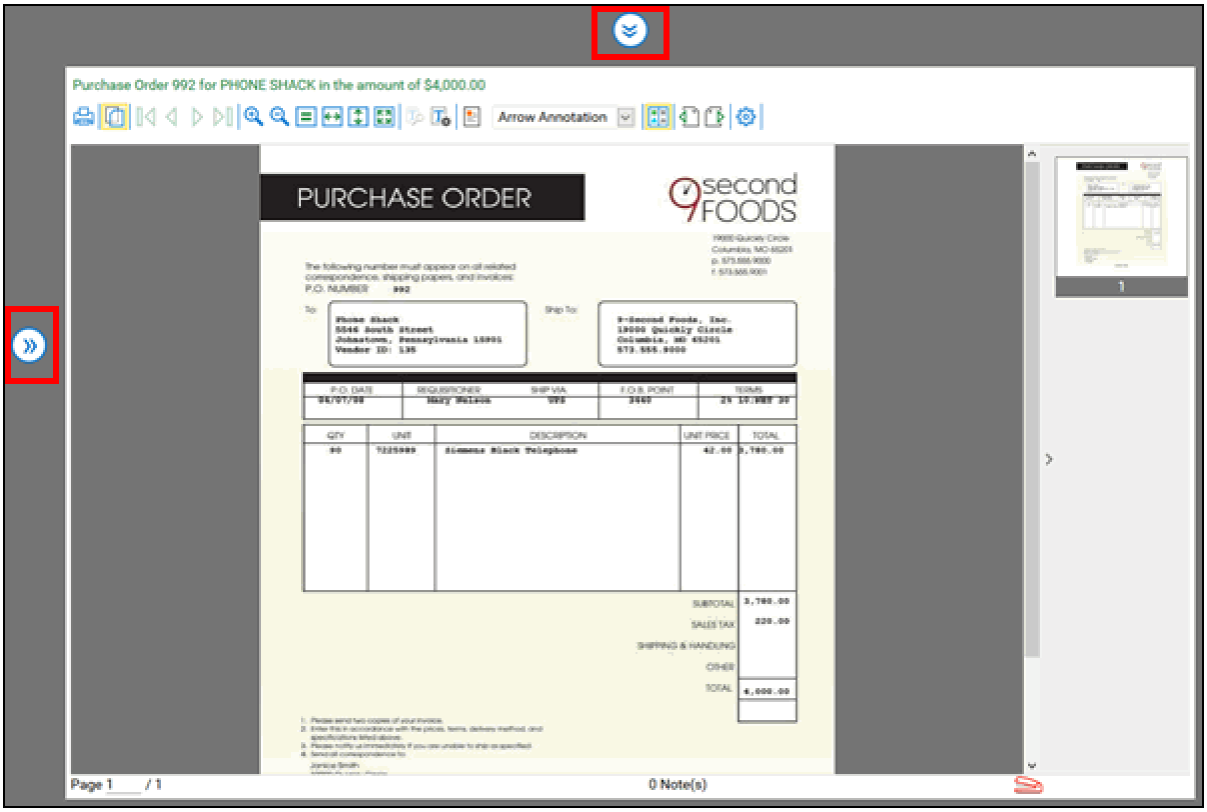
- To collapse the Navigation Panel, do one of the following:
  - Double-click the vertical handle.
  - Drag the vertical handle until the Navigation Panel collapses.



- To collapse the **Document Search Results** list, do one of the following:
  - Double-click the horizontal handle.
  - Drag the horizontal handle until the **Document Search Results** list collapses.



- To re-open a collapsed pane, click the expand button. The size of the re-opened pane depends on how you previously collapsed it:
  - If you double-clicked the handle, the pane re-opens at its previously configured size.
  - If you dragged the handle until the pane closed, the pane returns to its default size.



Web Client Interface Text

The Web Client interface does not display multiple consecutive empty spaces in textual labels. This includes items such as Document Type names and Keyword Type names, Custom Query or Folder names, Auto-Name strings in Document Search Results lists, and other textual labels that are part of the Web Client interface. Any consecutive spaces in these labels are displayed as a single space. For example, the Document Type name "**AP   Invoices**" would be displayed as "**AP Invoices**". This only affects how the Web Client displays these names; the name itself in the database still contains consecutive spaces.

When viewing a document’s Keyword Type data values in the **Add/Modify Keywords** dialog box, any Keyword Type values with consecutive spaces are displayed exactly as entered. To confirm the spacing in a Keyword Type value, view the document's Keyword Type values. See Access a Document's Keyword Values on page 189.

Assigning Favorites

Favorites provide an easy way to navigate your OnBase solution. You can manually add contexts to your **Favorites** list for easy access. You can then navigate to your **Favorites** list and click on a favorite to immediately navigate to that context.

Note: If you are licensed for E-Forms or Unity Forms, you can create a favorite for a specific form by creating a favorite when the form is displayed within the **New Form** context.

You can also configure one of your favorites as your **Home Page**, which displays automatically upon logging on. Select the **Favorites** icon to open your **Favorites** drop-down menu and configure your **Favorites** list.

Note: Depending on your browser and operating system, you may be able to pin the Web Client site to the Windows taskbar or Start Menu (you must be at the login screen when attempting this). From the pinned site, a Jump List of your Web Client favorites may be available. For more information on these features, see the Web Server documentation. Contact your system administrator if you have any further questions about features and system requirements.

See the following topics for descriptions of all available options.

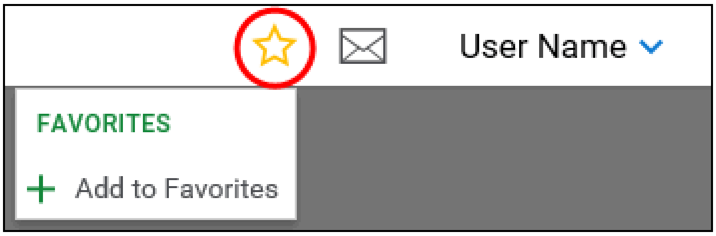
- Adding a Favorite on page 28
- Defining a Home Page on page 29
- Renaming a Favorite on page 31
- Deleting a Favorite on page 32

Adding a Favorite

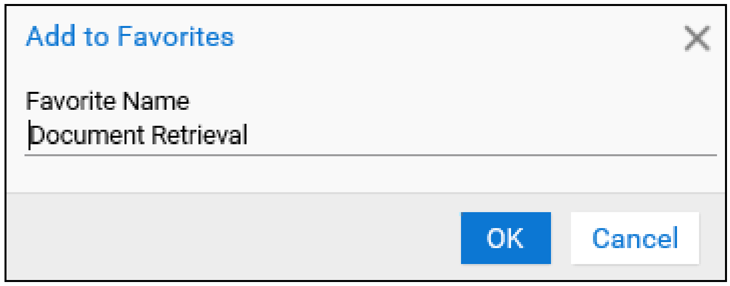
You can add the currently displayed context to your list of favorites. If you are licensed for E-Forms or Unity Forms, you can also add a currently displayed form to your favorites.

To add a favorite:

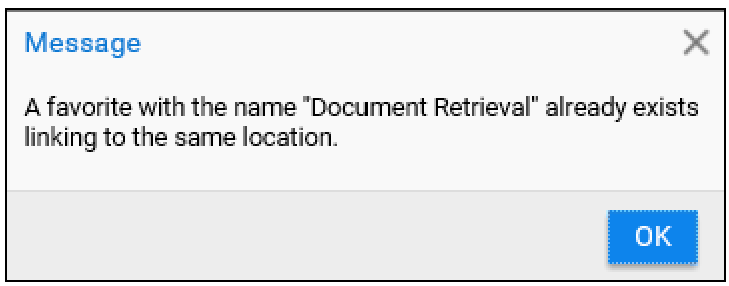
1. Click the **Favorites** icon in the title bar of the Web Client. The **Favorites** menu is displayed.



2. Click **Add to Favorites**. The **Add to Favorites** dialog box is displayed.



3. Either enter a name for the favorite, or accept the default value and click **OK**. If you entered a favorite that is already in use, a message box is displayed informing you of the duplication.



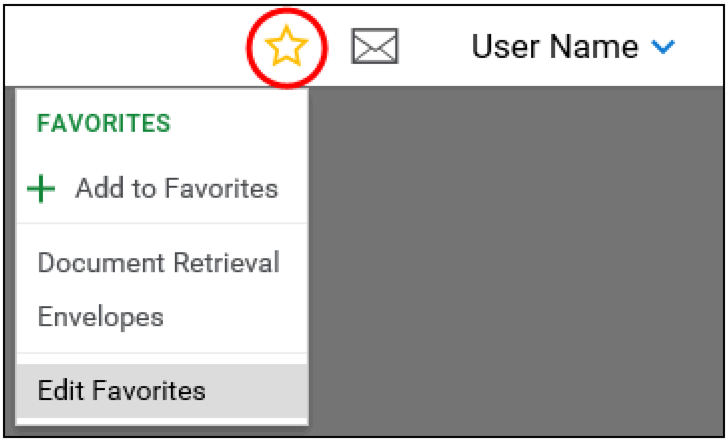
4. Click **OK** to close the message. The Favorite is added to the Favorites drop-down list.

Defining a Home Page

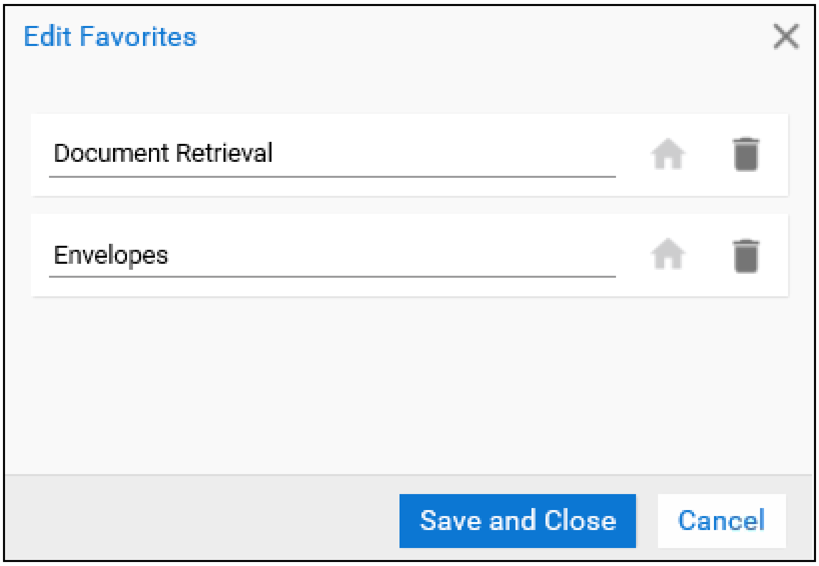
You can define one of your favorites to be displayed as the home page when you log on. For example, if you frequently import documents upon logging on, you can configure the **Import Document** context to be displayed as soon as you log on.

To define a home page:

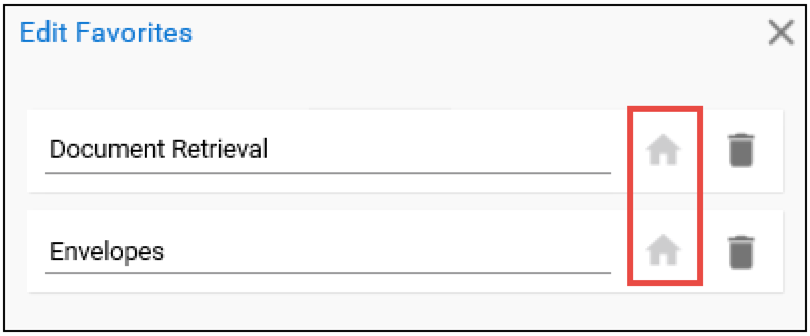
1. Click the **Favorites** icon in the title bar of the Web Client. The **Favorites** menu is displayed.



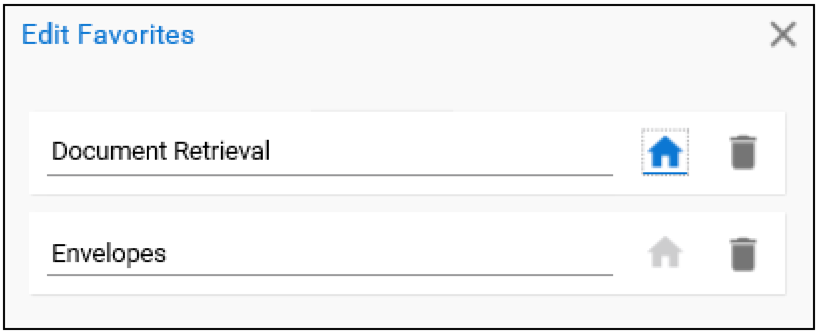
2. Select **Edit Favorites**. The **Edit Favorites** dialog box is displayed.



3. Select the **Home** icon next to the favorite you want as your home page.



The Home icon turns blue, indicating that the favorite you selected is now the home page.

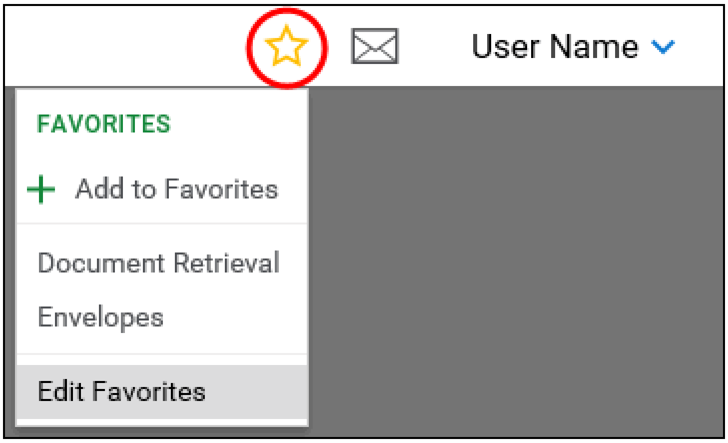


4. Click **Save and Close**. The selected favorite is now your home page, and is displayed first each time you log on. To reset the home page, repeat the steps above.

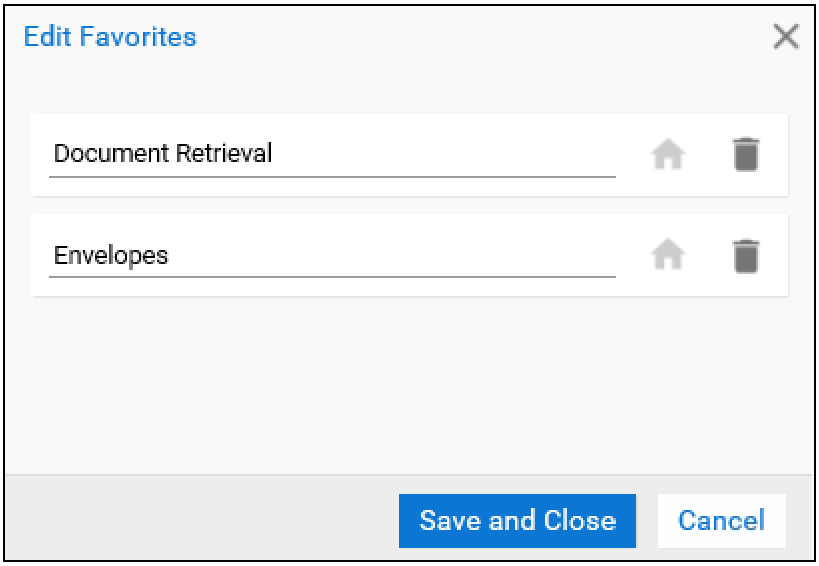
Renaming a Favorite

If you find that you need to rename a favorite, you can do so by performing the following steps:

1. Click the **Favorites** icon in the title bar of the Web Client. The **Favorites** menu is displayed.



2. Select **Edit Favorites**. The **Edit Favorites** dialog box is displayed.

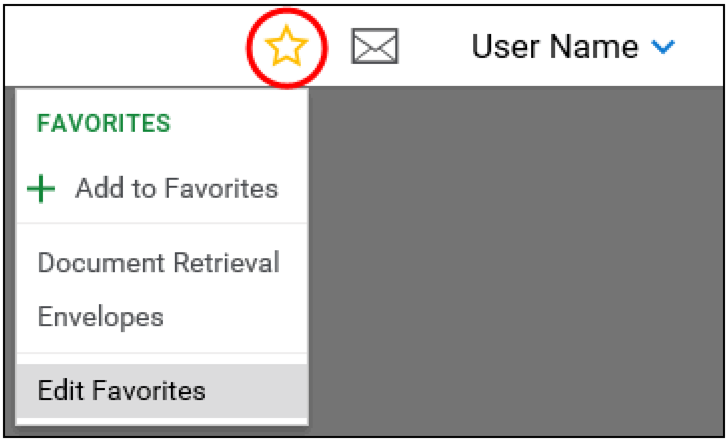


3. Modify the name of the favorite and click **Save and Close**. The favorite now displays in the favorites list with its new name.

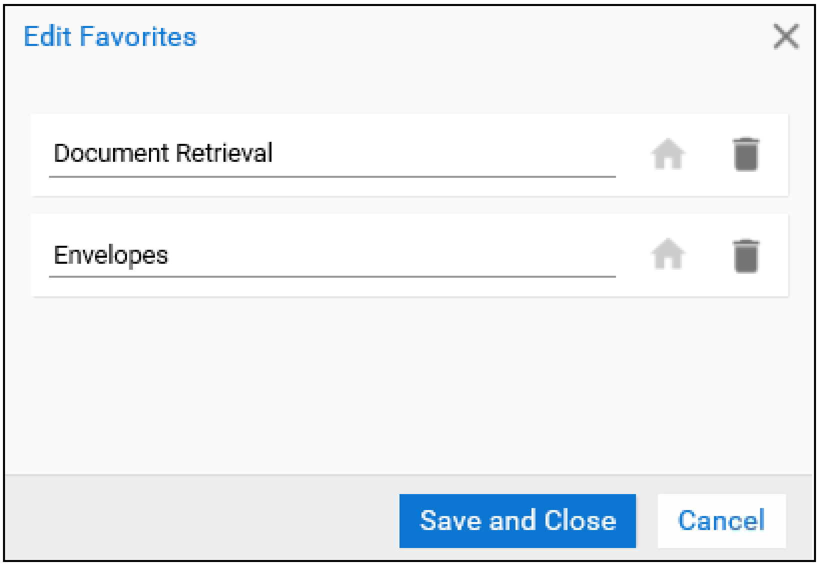
Deleting a Favorite

You can delete favorites that are no longer needed. To delete a favorite:

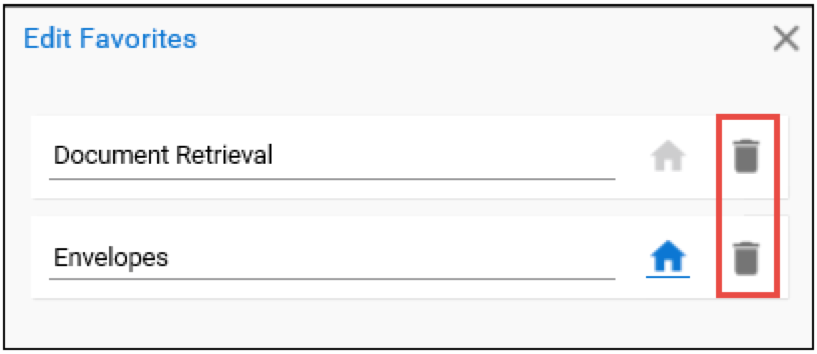
1. Click the **Favorites** icon in the title bar of the Web Client. The **Favorites** menu is displayed.



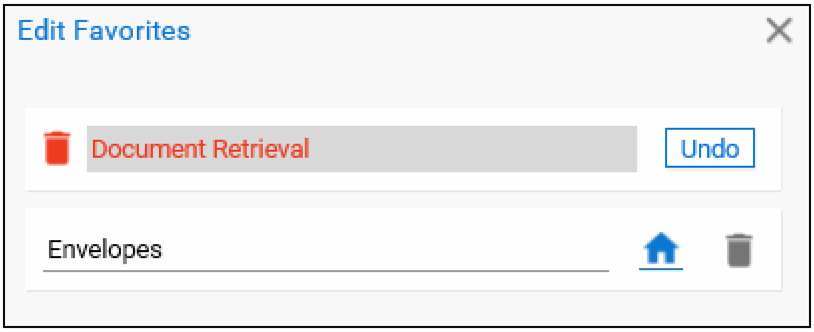
2. Select **Edit Favorites**. The **Edit Favorites** dialog box is displayed.



3. Select the **Delete** icon next to the favorite you want to delete.



The favorite you selected turns red, and an Undo option is displayed.



4. Click **Save and Close** to delete the favorite. If you selected this favorite in error, select the **Undo** option to restore the favorite to the Favorites list.

Web Client Keyboard Shortcuts

Instead of using your mouse, you can use keyboard shortcuts to accomplish tasks in certain areas of the Web Client.

Global Function Keys

The following shortcuts can be used globally across the Web Client.

Shortcut	Action
F1	Accesses the help files.
Ctrl + F4	Closes the open dialog box.
Alt + F4	Closes the Web Client.

Main Menu Keys

The following keyboard commands are available in the Main Menu.

Command	Action
Tab	Moves the focus between the **Main Menu** button and other elements in the Web Client interface.
Spacebar	Selects the focused interface element. **Tip:** To open the Main Menu, move the focus to the **Main Menu** button and press **Spacebar**.
Up Arrow	Moves the cursor up in the Main Menu.
Down Arrow	Moves the cursor down in the Main Menu.
Page Up	Scrolls up in the Main Menu.
Page Down	Scrolls down in the Main Menu.

Document Retrieval Shortcuts

The following shortcuts are available when navigating the keyword panel in Document Retrieval mode.

Shortcut	Action
F3	Toggles the Keyword Operator button.
F4	Toggles the Logical (Boolean) Operator button for duplicate keyword type fields.
F5	Expands a Keyword Type field's Keyword Select List (if one exists).
F6 or Ctrl + T	Creates a duplicate Keyword Type field. **Note:** The **Ctrl + T** shortcut is not supported in Chrome.
Ctrl + R	Displays the **Keywords** search tab.
Ctrl + S	Displays the **Text** search tab
Ctrl + I	Activates the **Search** button.
Ctrl + N	Displays the **Note** search tab. **Note:** This shortcut is not supported in Chrome.
Ctrl + K	Activates the **Clear Keywords** button.
Ctrl + C	Activates the **Clear All** button when focus is outside of a keyword field. When focus is inside of a keyword field, the **Copy** function is executed.
Ctrl + O	Expands or collapses Multi-Instance Keyword Type Groups.

Internal Mail Shortcuts

The following keyboard shortcuts are available when using Internal Mail.

Shortcut	Action
Ctrl + M	Selects the text in the **Message** text box.
Ctrl + R	Opens the Send Mail dialog to send a reply to the received message.
Ctrl + O	Opens the Send Mail dialog to forward the received message to another user.
Ctrl + S	Sends the message to the specified recipient.

Shortcut	Action
Ctrl + D	Prompts you to delete the mail message.

Document Search Results Lists and Open Documents

There are several keyboard shortcuts available in search result lists and in documents that are opened in the document viewer.

Document Search Results List Shortcuts

The following keyboard shortcuts are available when navigating Document Search Results lists.

Shortcut	Action
Ctrl + K	View or modify keywords for the selected document.
Ctrl + H	View the document history for the selected document.
Ctrl + Up Arrow	Select multiple documents.
Ctrl + Down Arrow	Select multiple documents.

Keyword Type Field Function Keys and Shortcuts

The following Function Keys and keyboard shortcuts are available in Keyword Type fields.

Shortcut	Action
F3	Toggles the Keyword Operator button.
F4	Toggles the Logical (Boolean) Operator button for duplicate Keyword Type fields.
F5	Expands a Keyword Type field's Keyword Select List (if one exists).
F6 or **Ctrl + T**	Creates a duplicate Keyword Type field. **Note:** The **Ctrl + T** shortcut is not supported in Chrome.
Ctrl + O	Expands all Multi-Instance Keyword Type Groups, or collapses all Multi-Instance Keyword Type Groups.
Ctrl + Del	When the focus is set to a Keyword Value that is part of a Multi-Instance Keyword Type Group, the entire instance of the Multi-Instance Keyword Type Group is deleted. **Note:** If there is only a single instance of the Multi-Instance Keyword Type Group, the single instance is not removed.

Document Viewer Toolbar Navigation

The following key-press combinations allow you to navigate the Document Viewer toolbar in the HTML Web Client.

Key-press	Action
Tab	Navigate the toolbar buttons from left to right.
Shift + Tab	Navigate the toolbar buttons from right to left.
Enter	Activate the selected button.

Document Viewer Shortcuts

The following keyboard shortcuts are available while viewing documents in the Web Client.

Note: These keyboard shortcuts are not available when viewing embedded OLE documents.

Shortcut	Function
Ctrl + F6	Navigates to the previous document in the Document Search Results list.
Ctrl + F7	Navigates to the next document in the Document Search Results list.
Ctrl + Page Up	Navigates to the previous page of the document.
Ctrl + Page Down	Navigates to the next page of the document.
Ctrl + Home	Navigates to the first page of the document. **Note:** This function is not supported in the ActiveX Web Client.
Ctrl + End	Navigates to the last page of the document.
Home	Navigates to the top of the current page.
End	Navigates to the bottom of the current page.
Page Up	Quickly scrolls up the current page.
Page Down	Quickly scrolls down the current page.
Up Arrow	Slowly scrolls up the current page.
Down Arrow	Slowly scrolls down the current page.
Ctrl + Up Arrow	Quickly scrolls up the current page.
Ctrl + Down Arrow	Quickly scrolls down the current page.

Shortcut	Function
Left Arrow	Slowly scrolls to the left on the current page.
Right Arrow	Slowly scrolls to the right on the current page.
Ctrl + Left Arrow	Quickly scrolls to the left on the current page.
Ctrl + Right Arrow	Quickly scrolls to the right on the current page.
+ (on numeric keypad)	Zooms in on the current page. (Only available in the ActiveX Web Client)
- (on numeric keypad)	Zooms out on the current page. (Only available in the ActiveX Web Client)

HTML Web Client Document Viewer Shortcuts

The following keyboard shortcuts are available while viewing documents in the HTML Web Client, in addition to the list of shortcuts in the previous section.

Note: These keyboard shortcuts are not available when viewing embedded OLE documents.

Shortcut	Function
Page Up	Quickly scrolls up the current page. At the beginning of a page in a multi-page document, scrolls to the previous page.
Page Down	Quickly scrolls down the current page. At the end of a page in a multi-page document, scrolls to the next page.
Ctrl + K	View or modify keywords for the selected document.
Ctrl + H	View the document history for the selected document.
Ctrl + N	Display the **Add Note** dialog for the current document. **Note:** This shortcut is not supported in Chrome.
Ctrl + Shift + N	Display the **View Notes** dialog for the current document. **Note:** This shortcut is not supported in Chrome.
Ctrl + P	Displays the **Print** dialog box.
Ctrl + W	Initiate a cross-reference from the current document. **Note:** This shortcut is not supported in Chrome or Firefox.

Item-specific Keyboard Shortcuts

You can use keyboard shortcuts in the Folders layout and the User Menu Preferences dialog box.

Folders

There is only one keyboard function available in the Folders layout:

Shortcut	Function
Ctrl + F	Opens the **Find Folder** dialog box when focus is on the Folder Tree.

User Preferences

The following keyboard functions are available when navigating the User Menu **Preferences** dialog box.

Shortcut	Function
Tab	Change the focus between radio buttons, drop-down lists, text entry fields, check boxes, and the **Save** button.
Arrow Keys (Up, Down, Left, Right)	Navigate between radio buttons, and scroll within a drop-down list.
Space Bar	Select or deselect a check box, and expand a drop-down list.
Enter	Save the configured user preferences.

OnBase®

Foundation EP5

Web Client

User Guide

Foundation EP5

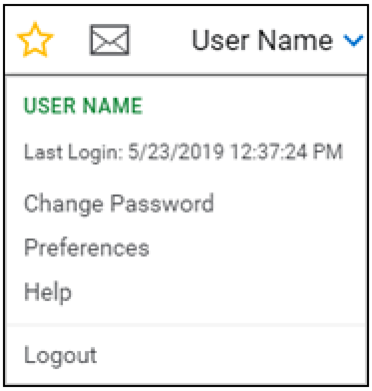
The following sections describe general functionality and options available in the Web Client.

All other configuration is performed by the system administrator in the Configuration module.

Web Client Options

You can change your Web Client logon password or change the default document date in the user menu, accessed by selecting the drop-down arrow next to your user name in the upper-right corner of the Web Client.

Note: If a **Real Name** value has been configured in either OnBase Configuration or the Web Client, this value is displayed next to the drop-down arrow instead of the user name.



From here, you can access the following:

- Change password
- User Preferences
- Help
- Logout

Changing Your Password

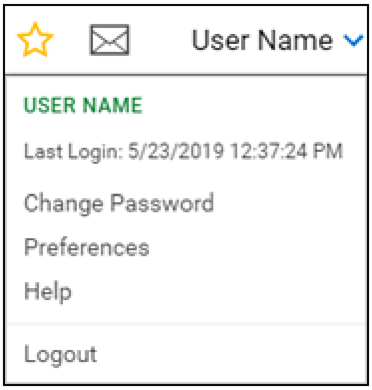
If you have appropriate privileges, you can change your OnBase password. When you change your password, the new password is saved throughout the entire OnBase system.

Note the following considerations when changing your password:

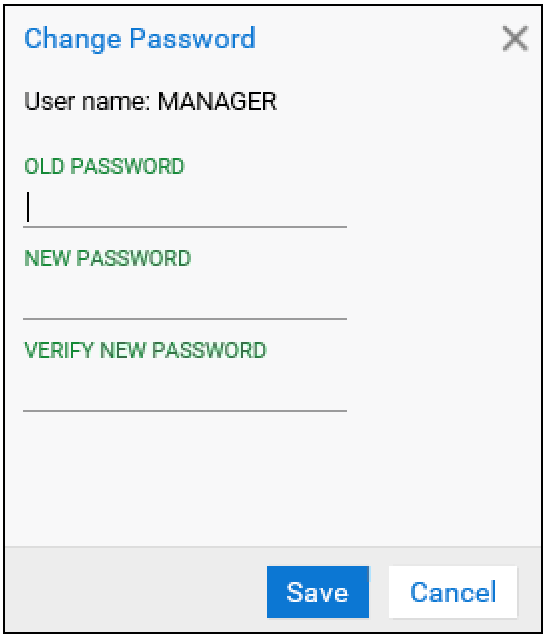
- Depending on your user account configuration and system setup, the **Change Password** option may not be available to you. See your system administrator for more information.
- The **Change Password** option is displayed in the user menu only if Standard Authentication is being used and if the property for the **Password** control bar setting in the Web Server web.config has been enabled.
- If password expiration is enabled in the OnBase system and your password has expired, the **Change Password** dialog box is displayed when attempting to log in. In this situation, you are required to change your password before entering the system.

To change your password:

1. Select **Change Password** from the user menu.



The **Change Password** dialog box is displayed.



2. In the **Old Password** field, type your current password.
3. In the **New Password** field, type the new password that you want to use in the future. Your new password can include any combination of printable characters, including those in the international character set.

Note: The minimum length and maximum length for a password are set by your system administrator.

4. In the **Verify New Password** field, type the new password again. It must be exactly the same as what you typed into the **New Password** field.
5. Click **Save**. A confirmation message is displayed.

6. Click **OK**.

User Preferences

In the User Preferences, the following options can be modified:

- Retrieval Default Date
- Auto-save Thumbnail Rotation
- Notify on New Mail

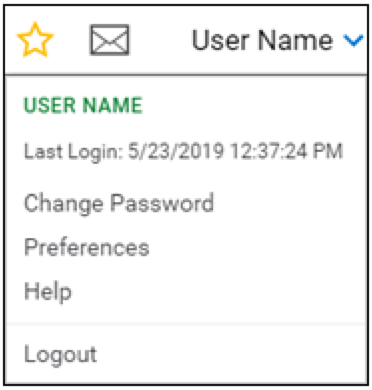
Changing the Retrieval Default Date

The Document Date is the date assigned to a document when it was imported into OnBase. The retrieval default date options let you change the default date available from Document Retrieval.

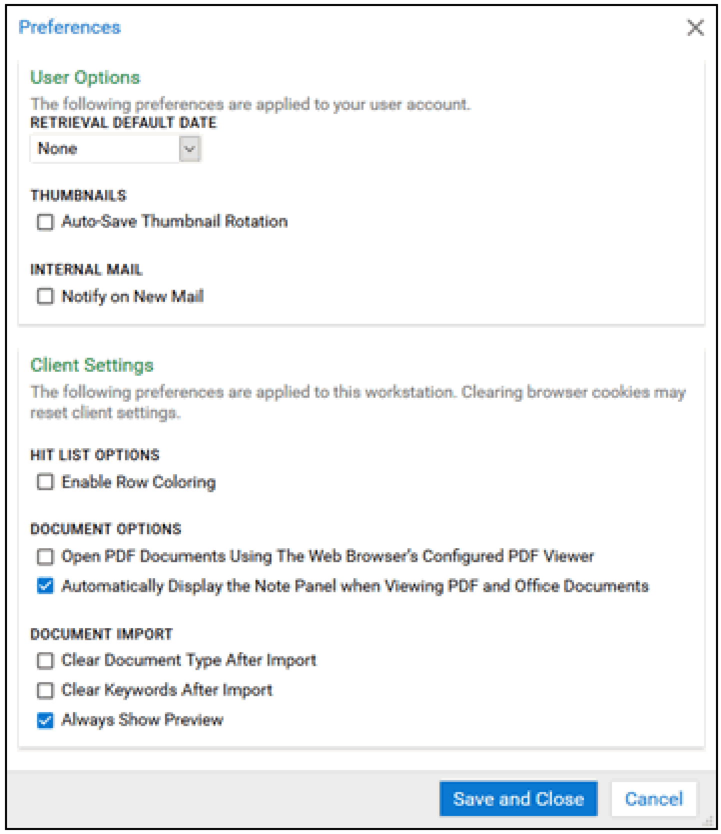
Your system administrator has defined a default document date or date range to be used for document retrieval. You can specify a different date or date range while you are performing an individual retrieval operation, but that date is replaced by the default date the next time you access **Document Retrieval**. You can save a different default retrieval date through your user options. This is helpful if you frequently search for documents from the same date or date range.

To change the retrieval default date:

1. Select **Preferences** from the user menu.



The **Preferences** dialog box is displayed.



2. Select the drop-down list in the **Retrieval Default Date** section. The following options are available:

Option	Description
None	No default date is used.
Last Weekday	The previous weekday is used as a default. Friday is considered the last day of the week.
Last Business Day	The previous business day is used as a default. Saturday is considered the last business day of the week.
Yesterday	Yesterday's date is used as the default date.
Today	Today's date is used as the default date.
First of the Month	The first day of the current month is used as the default date.
Last of the Month	The last day of the previous month is used as the default date.
Specific Day	The specified day is used as the default date.

Option	Description
Last Month	The date range of the previous month is used as the default date range.
Current Month	The date range of the current month is used as the default date range.
Current Week	The date range of the current week is used as the default date range.
Month to Date	The date range extends from the first day of the current month to the current date.
Year to Date	The date range extends from the first day of the year to the current date.
Last X Days	The date range is determined by the number of days specified. The maximum input allowed is 3650.
Last X Weeks	The date range is determined by the number of weeks specified. The maximum input allowed is 522.
Last X Months	The date range is determined by the number of months specified. The maximum input allowed is 120.

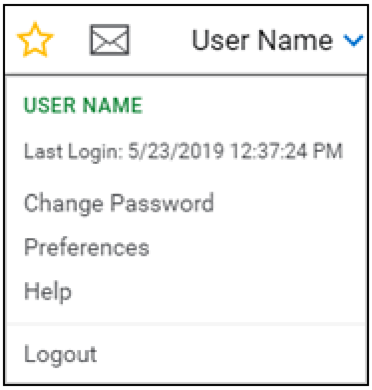
3. Click **Save and Close**. The default document date changes take effect immediately.

Automatically Save Rotations

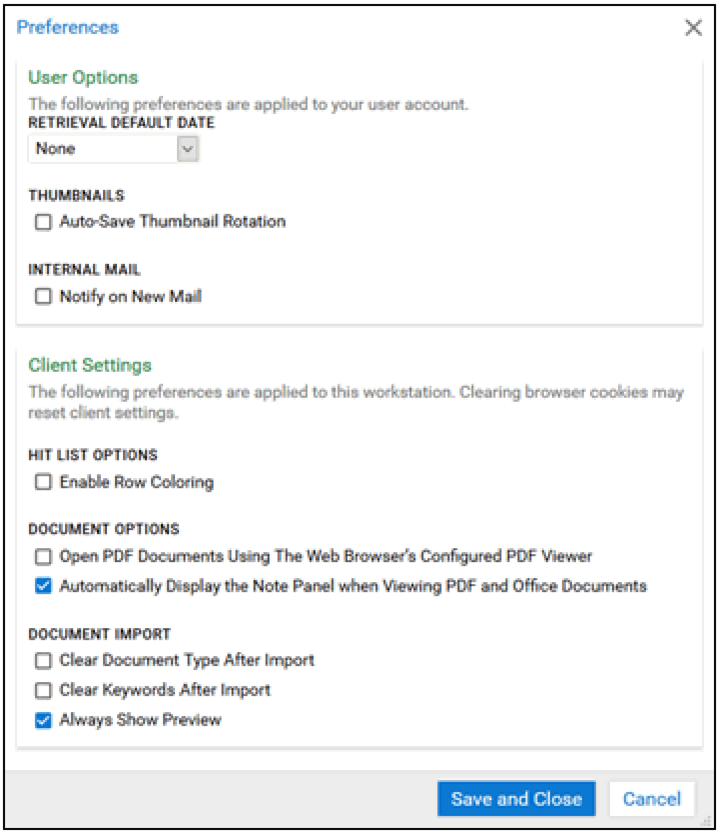
Depending on your system configuration, you may be able to rotate certain documents while viewing them. It is possible to configure your user account so that you automatically save any rotations you have made to a document when you close that document.

Note: If a document is open in another browser session, it is automatically locked and rotations are not saved.

1. Select **Preferences** from the user menu.



The **Preferences** dialog box is displayed.



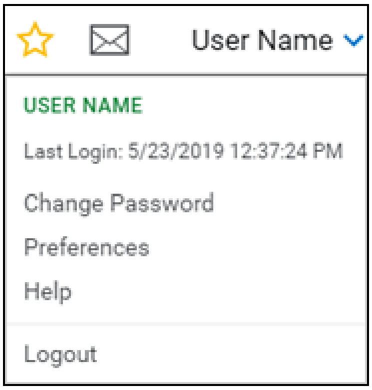
2. Select the **Auto-Save Thumbnail Rotation** check box. When this option is selected, all unsaved rotations on a document are automatically saved when the document is closed.
3. Click **Save and Close**.

Internal Mail Notification

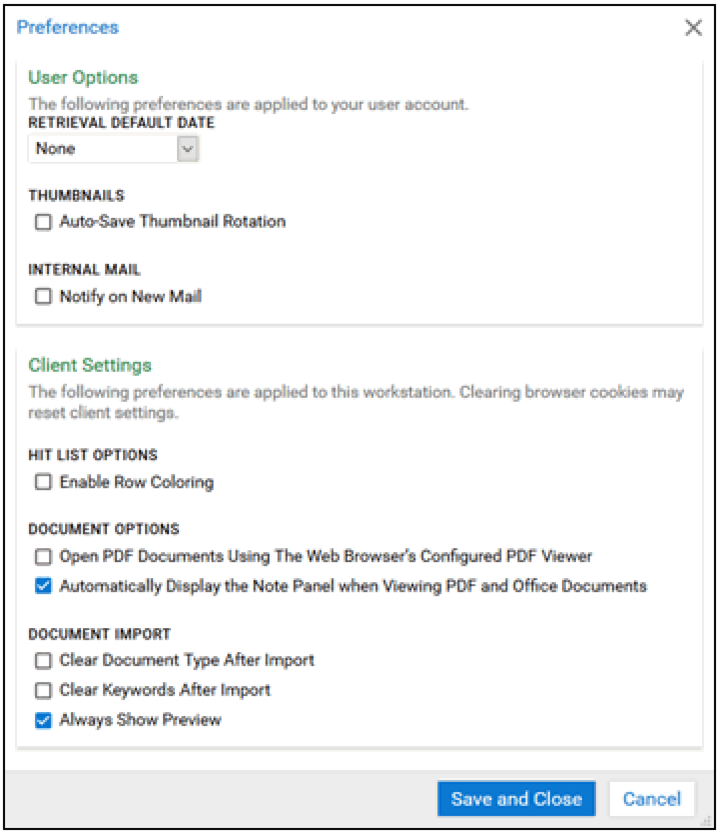
Depending on your system configuration, you may be able to send and receive internal mail from other OnBase users. You can be notified of any incoming mail by selecting the **Internal Mail** option.

To activate the new mail notification option:

1. Select **Preferences** from the user menu.



The **Preferences** dialog box is displayed.



2. Select the **Notify on New Mail** check box.
3. Click **Save and Close**.

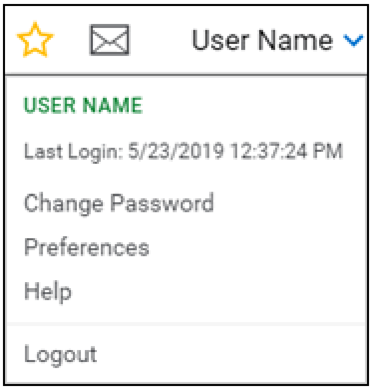
Client Settings

The **Client Settings** panel allows you to adjust personal preferences for the client's interface, as well as some of its behaviors. These settings are unique for the user and do not affect other users.

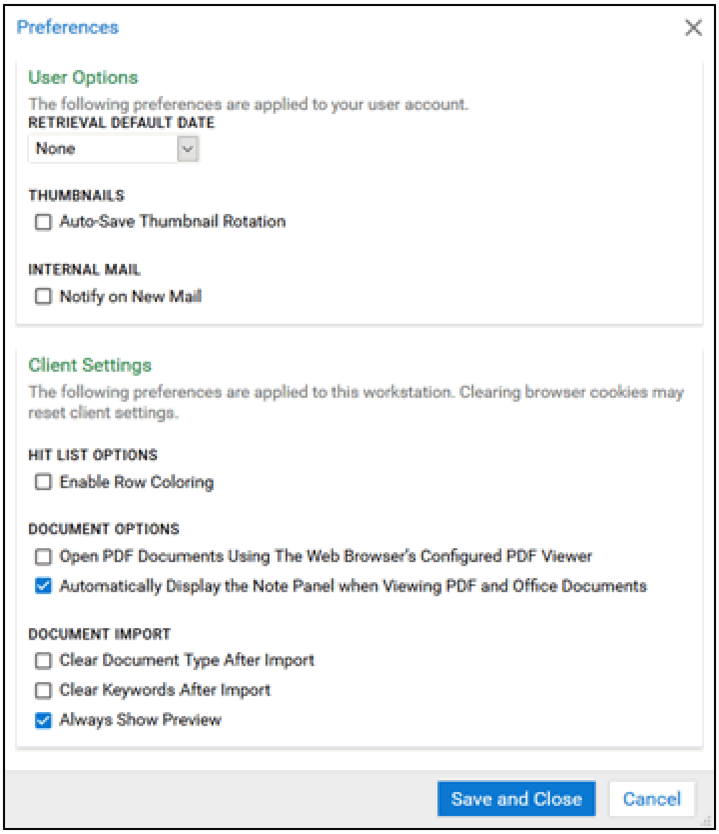
Note: Depending on your access settings, some of these options may not be made available to you.

To access the **Client Settings** panel:

1. Select **Preferences** from the user menu.



   The **Preferences** dialog box is displayed.



2. To modify Client Settings, see one of the following sections:
    - Hit List Options on page 52
    - Document Options on page 53
    - Document Import Options on page 53

Hit List Options

The **Hit List Options** section allows you to enable row coloring in Document Select Lists. When the **Enable Row Coloring** check box is selected, alternating rows in Document Select lists are shaded, making it easier to distinguish one result from others in the list. This setting persists until the cookie storing the setting is deleted, or until the setting is deselected.

Note: If this setting is unavailable, your system administrator has not enabled this setting.

Document Options

The **Document Options** section allows you to choose how documents are displayed in the Document Viewer. The following options are available:

Option	Description
Open PDF Documents Using The Web Browser's Configured PDF Viewer	Select this option to use your web browser's PDF viewer to display PDF documents. This viewer may be the browser's built-in viewer or a browser extension, depending on the configuration of the browser. Deselect this option to use the Web Client PDF viewer to display PDF documents. The Web Client PDF viewer allows you to use standard Document Viewer toolbar and right-click functionality, such as applying notes and annotations to specific positions. Note the following: • Password-protected PDF files cannot be viewed with the Web Client PDF viewer. The web browser's configured PDF viewer is used to display password-protected PDF files. • If this setting is unavailable, your system administrator has not enabled the setting.
Automatically Display The Note Panel When Viewing PDF and Office Documents	Select this option to have the **Notes** pane expanded next to the document viewer every time you open an OLE document such as a PDF or Microsoft Office document. Deselect this option if you do not want the **Notes** pane to be displayed by default when you open an OLE document. You can still manually expand the **Notes** pane after opening the document, if needed.

Document Import Options

The **Document Import** section allows you to choose how documents are imported.

Note: This section is available only if you have Import privileges.

The following options are available:

Option	Description
Clear Document Types After Import	Select this option to automatically clear the Document Type value from the **Import Document** dialog box once a document is imported. If this option is not selected, the Document Type value will be maintained after the document is imported.

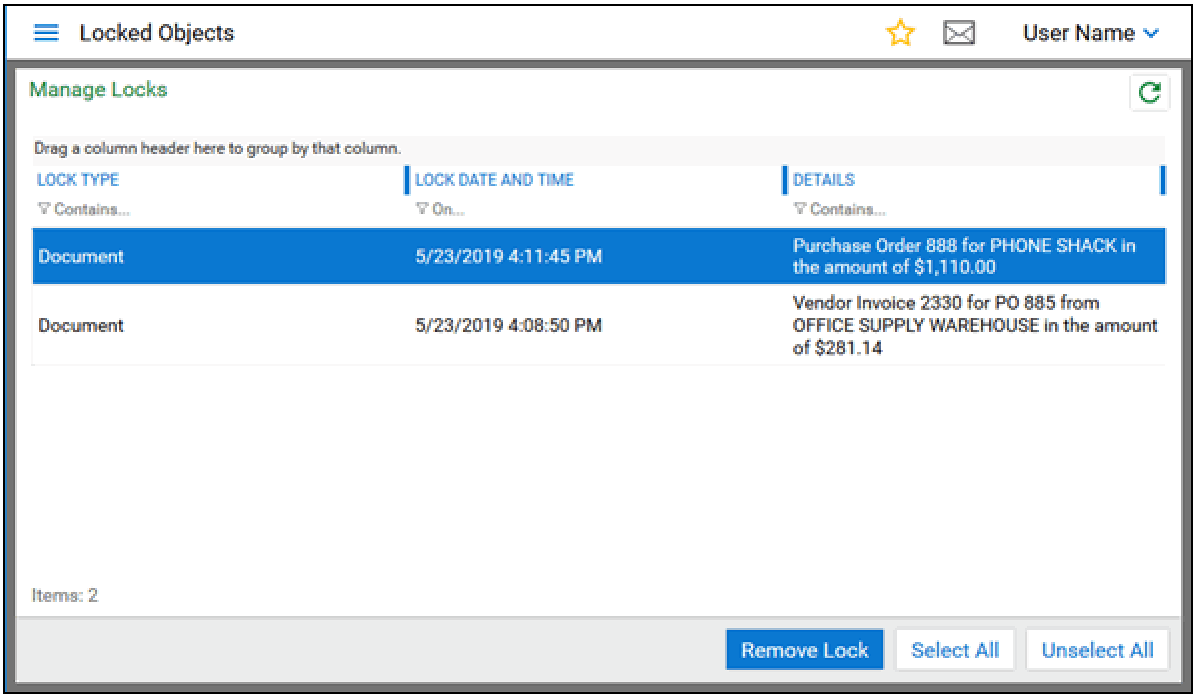
Option	Description
Clear Keywords After Import	Select this option to automatically clear all Keyword Type values from the Import Document layout once a document is imported. If any Keyword Types are configured with default values, the default values are populated in the Keyword Type fields. If this option is not selected, the Keyword Type values will be maintained after the document is imported.
Always Show Preview	Select this option to change whether a preview is displayed when importing image files in Import mode. When this option is selected, previews are always displayed for image documents. **Note:** Previews are not displayed when importing PDF documents larger than 100 MB.

Clearing Locked Objects

You may be able to clear your own locks using the **User | Locked Objects** option. Locks can occur if you have documents open when OnBase closes unexpectedly. You are prompted to clear the locks upon logging back in. If you do not clear the locks, other users will only be able to open read-only copies of the locked document.

To clear locked objects:

1. Select **Locked Objects** from the **User** section of the Main Menu. The **Locked Objects** layout is displayed, showing the locked objects belonging to you.



   The locked objects are displayed in sortable columns. To sort by a column, click the column heading.
2. From the list of locked objects, select the documents you want to unlock.
   - To select multiple documents, hold **Shift** or **Ctrl** while clicking the documents in the list.
   - To select all documents in the list, click **Select All**.
   - To deselect all documents in the list, click **Unselect All**.
3. Click **Remove Lock** to remove the locks from the selected documents.

Interface Translations

You can use the Interface Translations feature to configure your system to display item names (such as Document Types, Note Types, and Custom Queries) based on each individual workstation's Regional and Language Options. For more information on this topic, see the Interface Translations topic in the System Administration documentation.

Document Options and Right-Click Menus

OnBase document and right-click menu options can be accessed from various locations in the Web Client. For example, open documents, toolbar buttons, or right-clicking a document in a list are all means of accessing menu options.

The following is a list of document options and right-click menu options available when licensed for the Web Client module.

Note: The options available depend on the document from which options are accessed. Additional options may be available if other modules are licensed in addition to the Web Client.

Click an option below to navigate to the appropriate topic or right-click menu option.

Display Options

- Overlay
- Scale
- Process
- Display
- Open in New Window
- Toolbars | Viewer Control

Working with Documents

- Reindex
- View Selected
- Clear Selected
- Print
- Delete
- Delete Page
- Delete from Envelope
- Add Note
- Remove from Folder
- Create List Report
- Generate CSV File
- Toolbars | Annotations

Navigating Documents

- Cross-References
- Navigate
- Find Folder
- Show Folder Locations
- Toolbars | Pages

Send/Export Options

- Mail Document(s)
- Send To
- New Folder

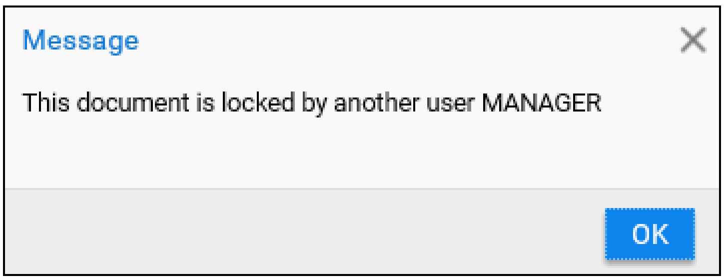
Document Information

- Properties
- Keywords
- Notes

Viewing Documents

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

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



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

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

Document Viewer

Note the following when working in the Document Viewer:

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

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

PDF Viewers

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

Document Retrieval

You can retrieve documents using one or more of the following search criteria:

- Document Type, Document Type Group, Document Handle
- Keyword Value and Date
- Note text or Document Text (for text-based documents.)

These instructions describe the most common types of retrieval, all of which also include the ability to limit the search by Document Type or Document Type Group:

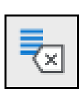
- Document Retrieval by Keyword Value on page 65
- Document Retrieval by Document Handle on page 73
- Document Retrieval by Document Date on page 89
- Document Retrieval Using Note Search on page 77
- Document Retrieval Using External Text Search on page 82

In addition, the following sections provide general information about document retrieval controls and processes:

- Document Retrieval Buttons on page 60
- Document Retrieval Keyboard Shortcuts on page 61

Document Retrieval Buttons

The following buttons are available in the navigation panel in Document Retrieval mode.

Button	Description
Clear Keywords 	Empties all Keyword Type fields in the navigation panel. Available from many document retrieval functions using Keyword Values as search criteria.
Clear All 	Resets the search criteria and clears the current document from the document viewer. Available from many document retrieval functions.
Search 	Initiates the document search using the criteria you have entered for any document retrieval method (for example, using Keyword Values, note text, document text, or Custom Queries) or when searching for a folder.

Document Retrieval Keyboard Shortcuts

The following keyboard shortcuts are available in Document Retrieval mode:

Shortcut	Action
Ctrl + R	Displays the **Keywords** search tab.
Ctrl + S	Displays the **Text** search tab
Ctrl + N	Displays the **Note** search tab. **Note:** This shortcut is not supported in Chrome.
Ctrl + I	Activates the **Search** button.
Ctrl + K	Activates the **Clear Keywords** button.
Ctrl + C	Activates the **Clear All** button.

Retrieving Documents by Document Type Group

Document Type Group searches allow you to retrieve documents from multiple Document Types associated with the Document Type Group.

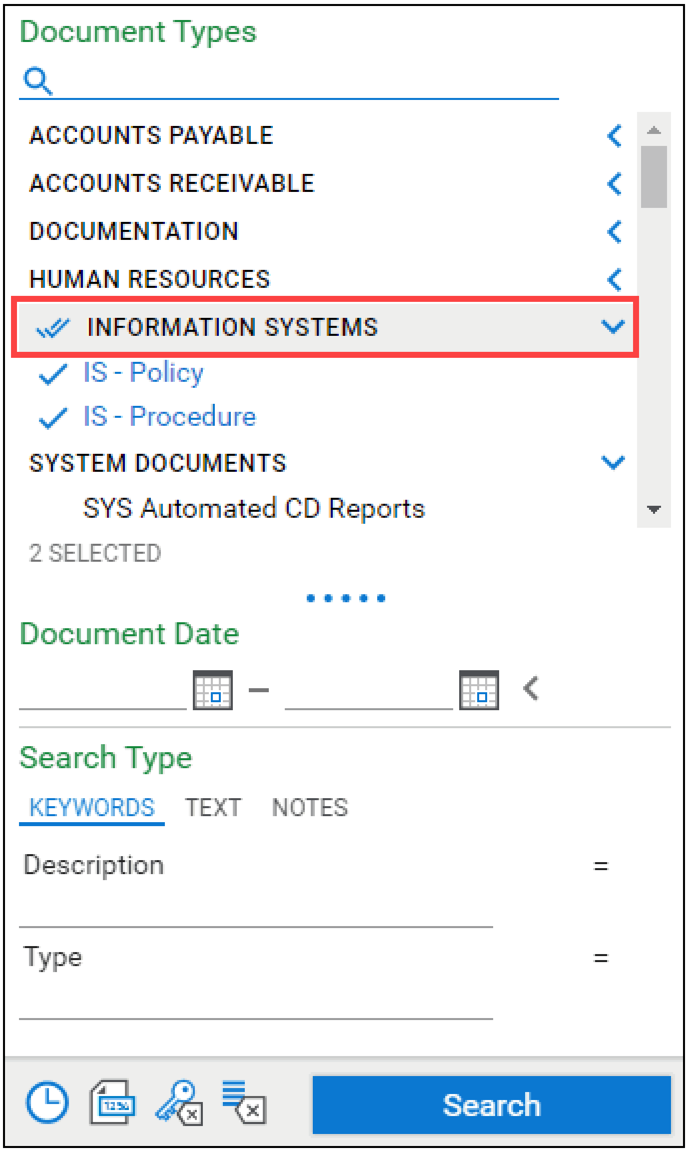
If Document Types in the Document Type Group are configured with search parameters (for example, to require a Keyword Value be entered for the **Date** Keyword Type prior to performing the search), the most restrictive search parameter out of all Document Types in the Document Type Group is enforced.

For example, the **XYZ** Document Type Group contains Document Type **A** and Document Type **B**. Document Type **A** is configured to require the entry of a **Date** Keyword Value in order to perform the search. Document Type **B** is configured to only warn the user that a **Date** Keyword Value should be entered prior to the search, but the search can be performed whether a **Date** Keyword Value is entered. When a search is performed of the **XYZ** Document Type Group, the search parameter for Document Type **A** is enforced as it is the most restrictive of the two search parameters configured.

To retrieve documents by Document Type Group:

1. Open the **Document Retrieval** layout.
   a. Click **Main Menu** to expand the menu options.
   b. From the **Document** section, select **Document Retrieval**. The **Document Retrieval** layout is displayed.

2. From the Document Retrieval Search pane, in the **Document Types** section, select a Document Type Group containing the types of documents you want to retrieve.



Tip: Document Type Groups display double check marks to the left of the Document Type Group name when hovering over them or selecting them in the Document Retrieval Search pane.

3. Click **Search** or press **Enter** to perform the search. One of the following may occur:
   - If documents are found, a list of documents is retrieved and displayed in the **Document Search Results** pane.
   - If no documents are found, the message **No items to display** is displayed in the **Document Search Results** pane.

- If search parameters are configured for Document Types in the Document Type Group, the most restrictive search parameter is enforced and a prompt is displayed regarding the search parameter to fulfill. If you are required to enter a Keyword Value, see Document Retrieval by Keyword Value on page 65. If you are required to enter a document date or date range, see Document Retrieval by Document Date on page 89.

Retrieving Documents by Document Type

Document Type searches allow you to retrieve documents organized by Document Type.

If Document Types are configured with search parameters (for example, to require a Keyword Value be entered for the **Date** Keyword Type prior to performing the search), the most restrictive search parameter out of all Document Types selected to search are enforced.

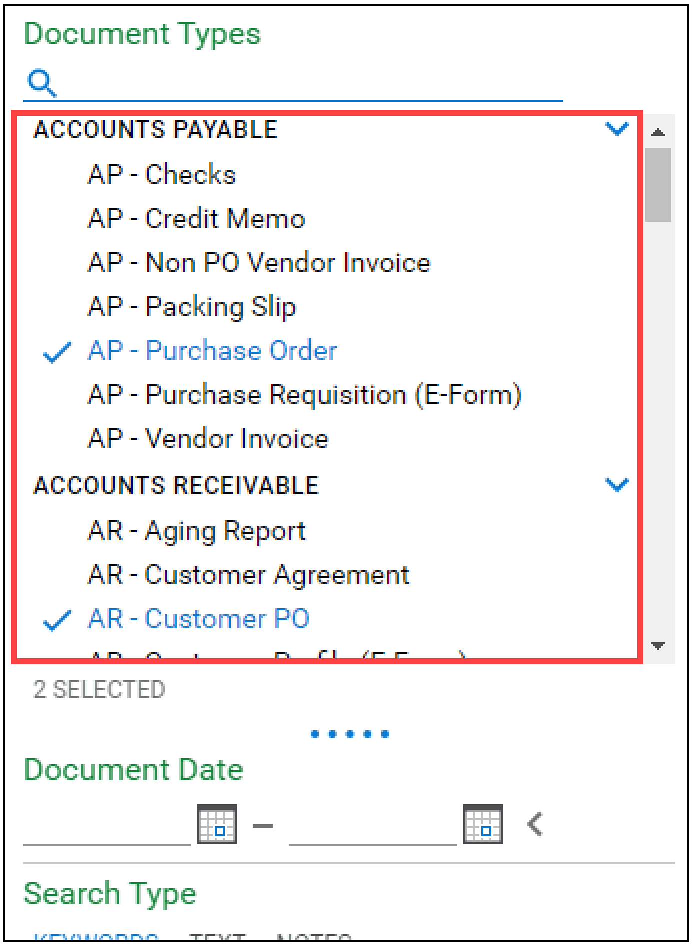
For example, Document Type **A** is configured to require the entry of a **Date** Keyword Value in order to perform the search. Document Type **B** is configured to only warn the user that a **Date** Keyword Value should be entered prior to the search, but the search can be performed whether a **Date** Keyword Value is entered. When the search is performed on both Document Types, the search parameter for Document Type **A** is enforced as it is the most restrictive of the two search parameters configured.

To retrieve documents by Document Type:

1. Open the **Document Retrieval** layout.
   a. Click **Main Menu** to expand the menu options.
   b. From the **Document** section, select **Document Retrieval**. The **Document Retrieval** layout is displayed.

2. From the Document Retrieval Search pane, in the **Document Types** section, select one or more Document Types from which you want to search listed under each Document Type Group.

Note: Document Types may be collapsed under their corresponding Document Type Groups. Click the drop-down arrow to the right of the Document Type Group name or select the Document Type Group and press the **Right Arrow** key to expand the Document Type Group and view the associated Document Types.



3. Click **Search** or press **Enter** to perform the search. One of the following may occur:
    - If documents are found, a list of documents is retrieved and displayed in the **Document Search Results** pane.
    - If no documents are found, the message **No items to display** is displayed in the **Document Search Results** pane.
    - If you selected one Document Type and it is configured with a search parameter, a prompt is displayed regarding the search parameter to fulfill. If you are required to enter a Keyword Value, see Document Retrieval by Keyword Value on page 65. If you are required to enter a document date or date range, see Document Retrieval by Document Date on page 89.
    - If you selected multiple Document Types, and they are configured with varying search parameters, the most restrictive search parameter is enforced and a prompt is displayed regarding the search parameter to fulfill. If you are required to enter a Keyword Value, see Document Retrieval by Keyword Value on page 65. If you are required to enter a document date or date range, see Document Retrieval by Document Date on page 89.

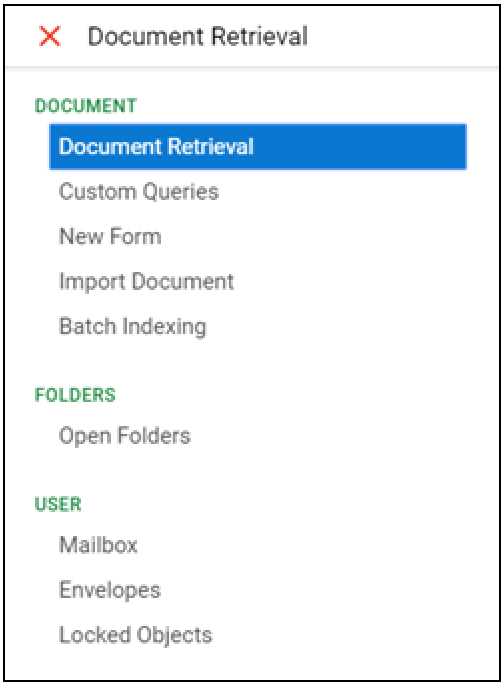
Document Retrieval by Keyword Value

You can retrieve documents by keyword values that have been assigned to document types.

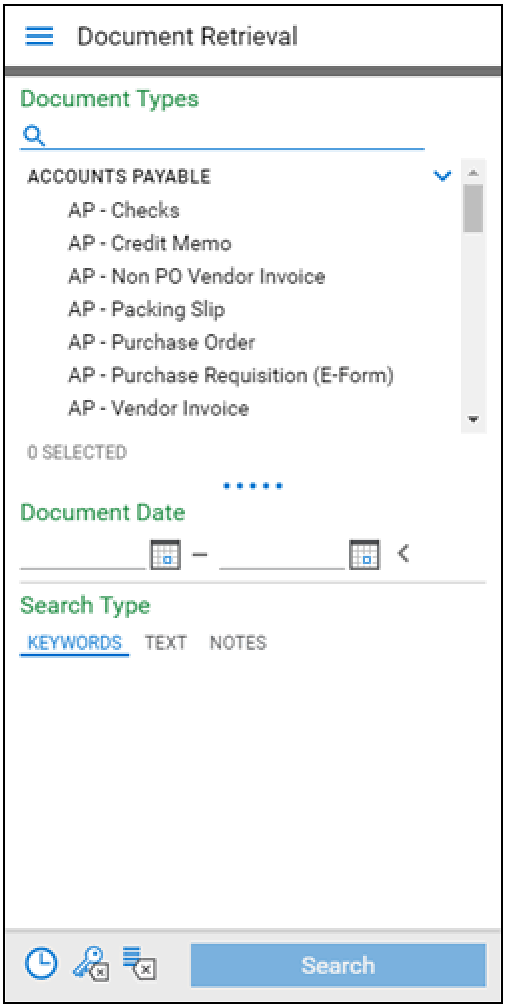
Note: The options available to you will depend upon your User Groups and Rights and the configuration of the Document Types and Groups. See your system administrator for details.

To retrieve documents by keyword value:

1. Select the Main Menu button. The Menu list is displayed.

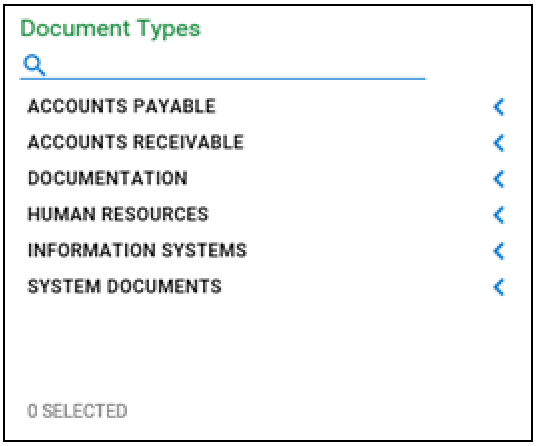


2. Select **Document Retrieval** from the menu. The **Document Retrieval** information is displayed in the navigation panel.



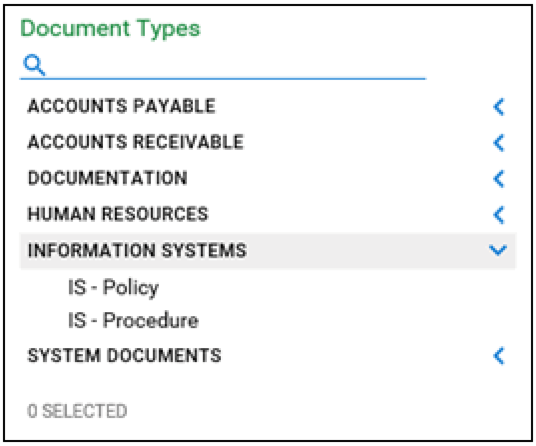
Note: Some Document Types are configured to require Keyword Values to be entered in order to create and/or retrieve documents. Required Keyword Values are displayed in red for these operations, which may include the following: Document Retrieval, importing, indexing, re-indexing, viewing or modifying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

3. Select a Document Type from the **Document Types** section. Depending on how the Web Client has been customized, the Document Types may be collapsed under their corresponding Document Type Groups.

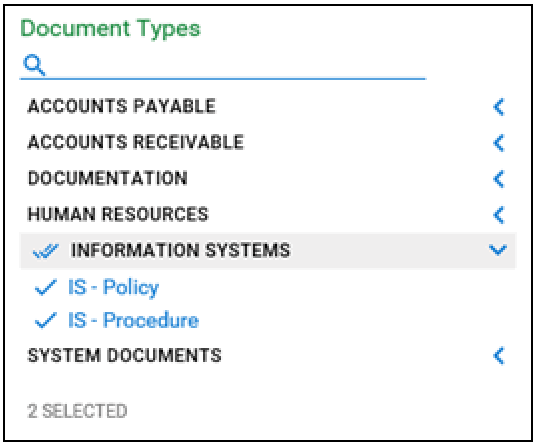


Click the drop-down arrow to expand a Document Type Group and view the Document Types in each group.

Tip: You can also use the keyboard to expand and collapse a Document Type Group. Select the Document Type Group, then press the **Right Arrow** key to expand or the **Left Arrow** key to collapse the Document Type Group.



4. From the **Document Types** list, select the Document Type(s) to be included in your search. To select multiple Document Types, use one of the following methods:
   - Press **Shift** or **Ctrl** as you click the documents to search.
   - Group the Document Types, and then select the Document Group name to select all documents in that group.



   The Keywords panel displays Keyword Types for the selected Document Type. Note the following:
   - If multiple Document Types are selected, the panel displays Keyword Types that are common to both.
   - If Keyword Types have not been configured for the document or for multiple documents, a message is displayed indicating that Keywords are not available for a single document, or that common Keywords do not exist for multiple documents.
5. To narrow your search further, you can search using one of the following options:
   - **Keyword Value**. From the available Keyword Type fields, enter or select Keyword Values from drop-down lists. As you type a Keyword Value in a drop-down list, the list of available Keyword Values is narrowed down.

     Pressing **F5** opens the drop-down list for Keyword Values if one exists. If you begin to type a value and then press **F5**, the drop-down list begins with those values that match the entered value.

Note: Each Document Type is associated with one or more Keyword Types. All documents assigned to a Document Type have the same Keyword Types, and unique Keyword Values. If multiple Document Types are selected, the only applicable Keyword Types are those that are common to all the selected Document Types.

   - **From Date** and **To Date** fields. See Document Retrieval by Document Date on page 89 for details.

Note: If you enter only a **From Date**, all documents from that date forward are retrieved. If you enter only a **To Date**, all documents up to that date are retrieved. If you enter a from and a to date, all documents within the date range are retrieved.

- **Text** tab. This allows you to search for documents by text string (External Text Search - applicable for text-based documents). See Document Retrieval Using External Text Search on page 368 for details.
- **Note** tab. This allows you to search for documents by Note Types and note text. See Document Retrieval Using Note Search on page 77 for details.

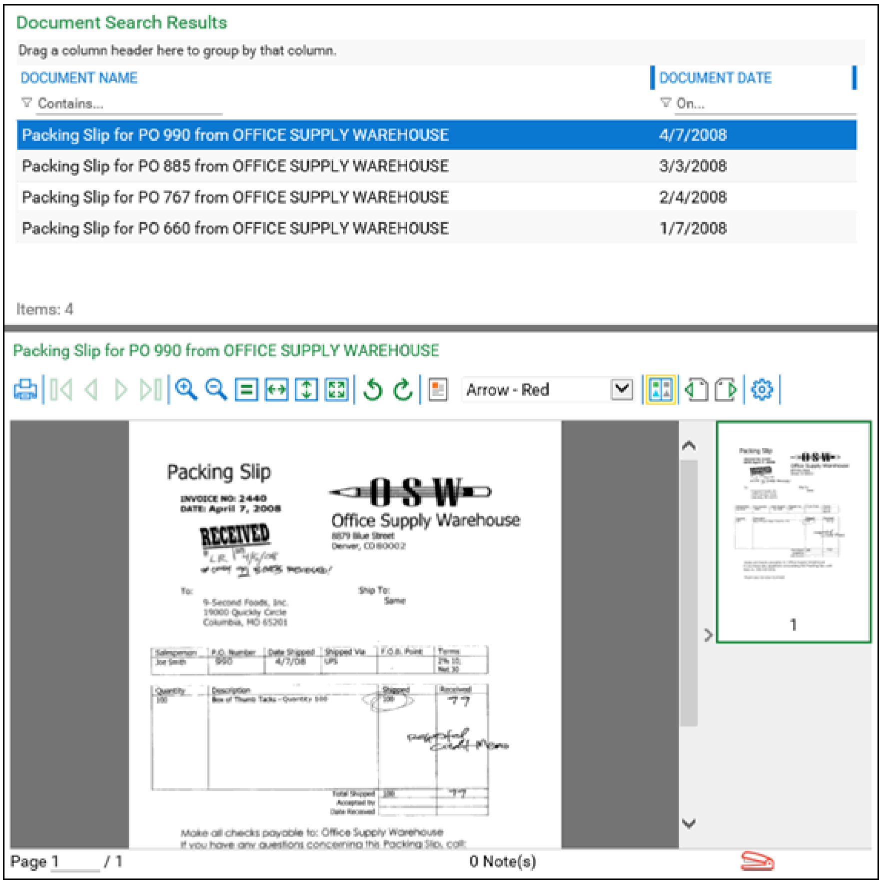
Note: Some searches require you to enter at least one Keyword Value. Search requirements are determined by your system administrator.

- **Full-Text Search** field. This allows you to search for documents by entering specific words or phrases into the Full-Text field.

Note: The Full-Text field is available only if your privileges provide access to this option.

6. When you have entered all search criteria, click **Search** at the bottom of the navigation panel. All documents that match the search criteria are displayed in a Document Search Results list.

Note: If no documents match your criteria, the Document Search Results List displays **No items to display**.



If you used a text search as a method of retrieval, OnBase provides the number of times the search criteria appears in the document, as well as the page(s) on which the items were found.

Note: If you do not enter any search criteria, a message may be displayed indicating that you are running an unrestricted query, which could take a long time. You can choose **Yes** to continue your search, or choose **No** to go back and select parameters to narrow your search.

You can do the following from the Document Search Results List:

- Open a document by double-clicking its listing, or clicking the page number for text-based searches. The document is displayed in the Document Viewer.
- Navigate through documents using the Document Viewer toolbar buttons.

7. To open multiple documents, elect to open subsequent documents in a new window. For more information, see Open in New Window on page 104.

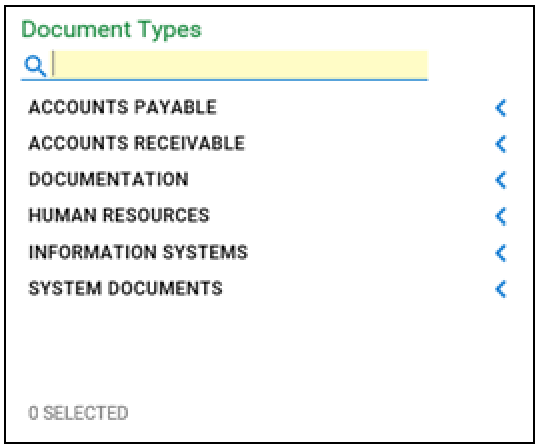
Note: During a given session, OnBase maintains a record of the search criteria used in each search in Query History, so that you can repeat it exactly.

Document Retrieval by Filtering Document Types

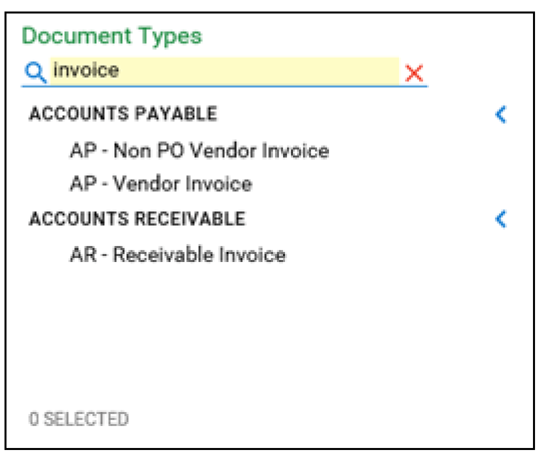
You can enter a specific document type in the Filter field to quickly retrieve documents.

To find document types using the Filter field:

1. Click in the Filter field on the top of the Document Types panel. The field turns yellow, allowing you to type a document type name.



2. Type the either a partial or a full name of a document type. The results display in the select list.



3. Select the document type you want and click **Search**. The results are displayed in the Search Results window.

Document Retrieval by Document Handle

If you have sufficient privileges, you can retrieve documents by their Document Handles. Document Handles are unique numbers assigned to each document.

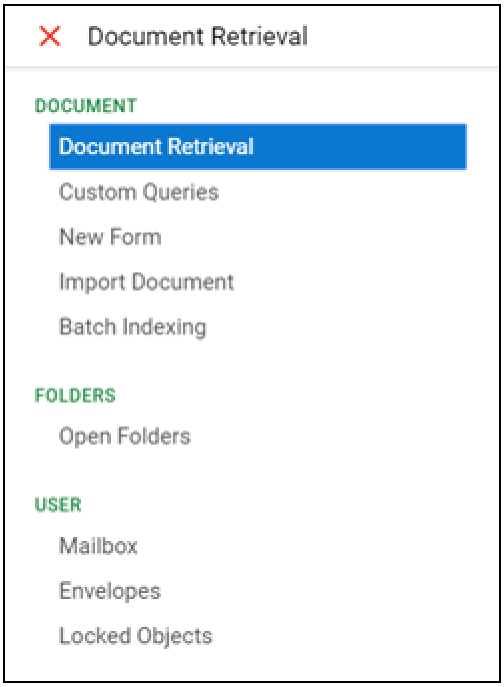
You can retrieve documents by the Document Handles in the following ways:

- Access Document Handle mode through the **Document Retrieval** layout.
- Access Document Handle mode through the **Retrieve by Document Handle** option in the Main Menu.

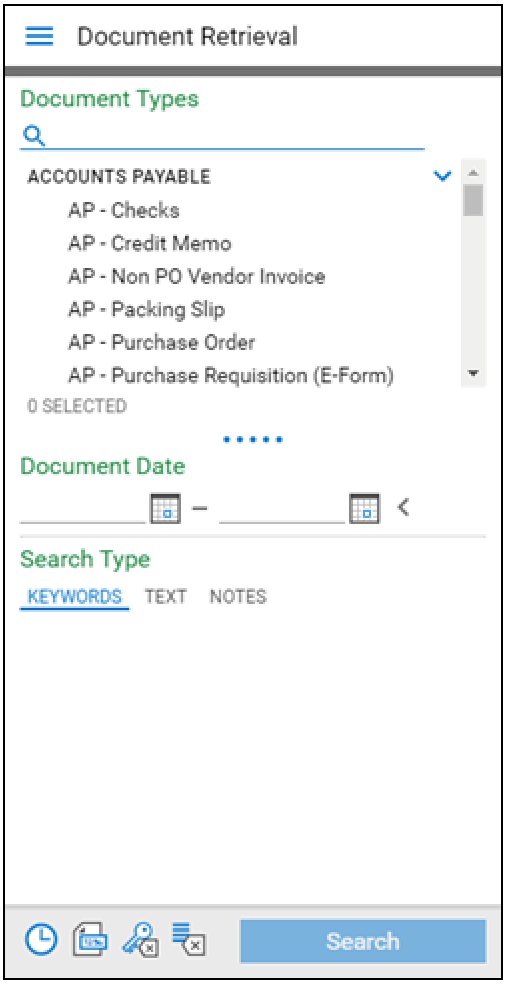
Access Document Handle Mode Through the Document Retrieval Layout

Complete the following steps to retrieve documents through **Document Retrieval** layout:

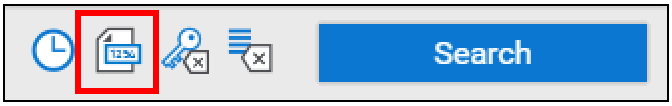
1. Select the **Main Menu** button. The Main Menu is displayed.



2. Select **Document Retrieval** from the menu. The Document Retrieval information is displayed in the navigation panel.



3. Click the **Retrieve by Document Handle** button from the bottom of the Document Retrieval pane.



The **Retrieve by Document Handle** fields are displayed at the bottom of the Document Retrieval pane.

4. Enter numeric search criteria and click **Search**.

   You can enter a range of numbers in the **From** and **To** fields to retrieve all documents within that range, or enter a single number in either field to retrieve the document assigned that Document Handle.

   OnBase retrieves all documents that you have rights to view and that meet your search criteria. These results include documents that have been deleted, but not purged.

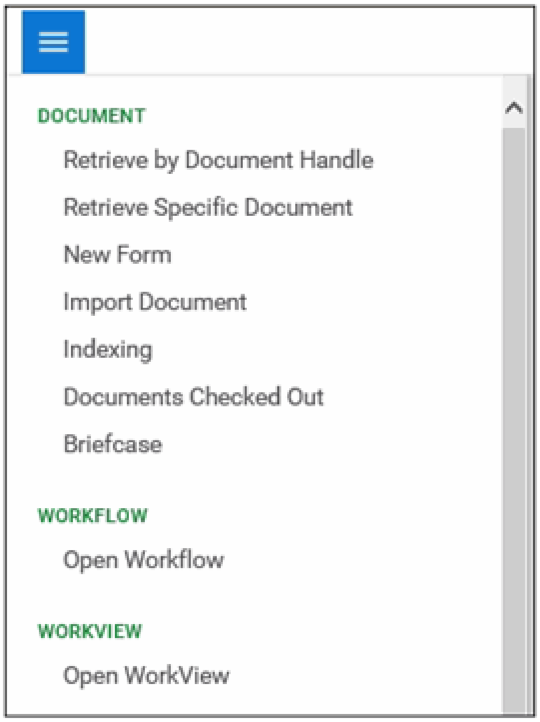
Note: If no documents match your criteria, the Document Search Results List displays **No items to display**.

Access Document Handle Mode Through the Main Menu

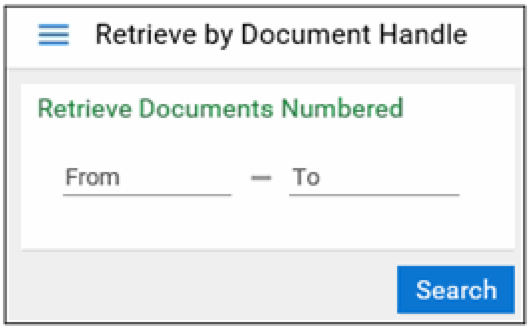
If you have rights to retrieve by Document Handle but do not have access to the Document Retrieval layout, you may be able to access the Document Handle mode from the Main Menu.

Complete the following steps to retrieve documents through the **Retrieve by Document Handle** option in the Main Menu:

1. Select the **Main Menu** button. The Main Menu is displayed.



2. Select **Retrieve by Document Handle** from the menu. The **Retrieve by Document Handle** information is displayed in the navigation panel.



3. Enter numeric search criteria and click **Search**.

   You can enter a range of numbers in the **From** and **To** fields to retrieve all documents within that range, or enter a single number in either field to retrieve the document assigned that Document Handle.

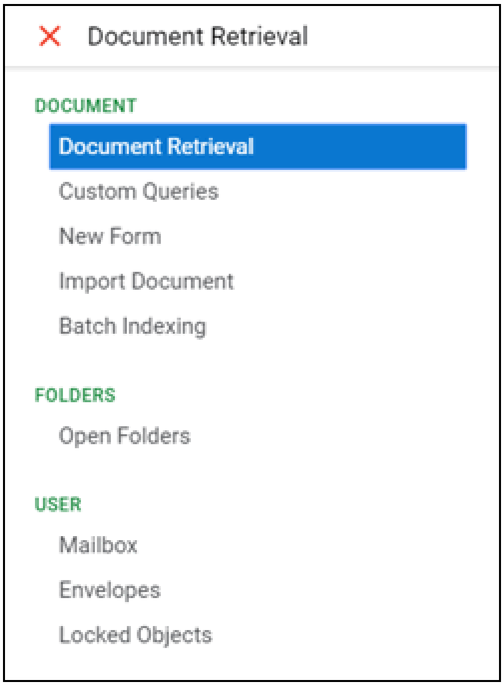
   OnBase retrieves all documents that you have rights to view and that meet your search criteria. These results include documents that have been deleted, but not purged.

Note: If no documents match your criteria, the Document Search Results List displays **No items to display**.

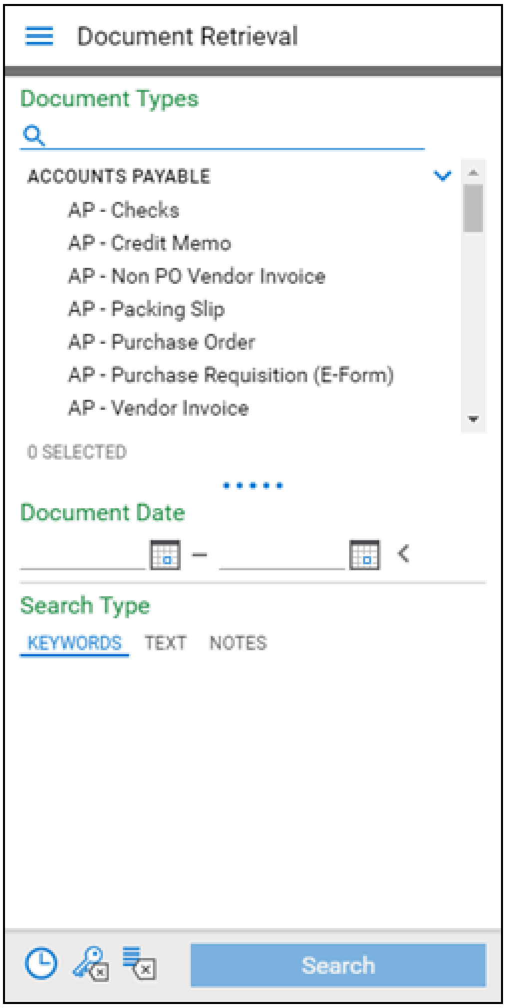
Document Retrieval Using Note Search

The OnBase Web Client lets you search documents for notes. You can limit your search by Document Type, Keyword Value, Note Type, note text, note creation date, and the note creator.

1. Select the Main Menu button. The Menu list is displayed.

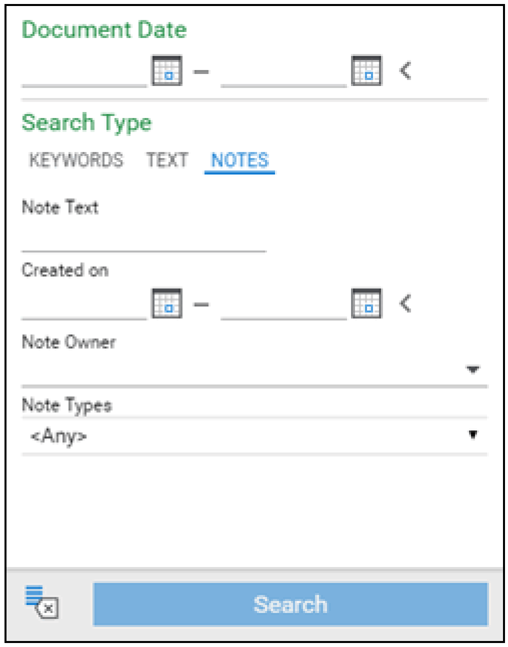


2. Select **Document Retrieval** from the menu. The **Document Retrieval** information is displayed in the navigation panel.

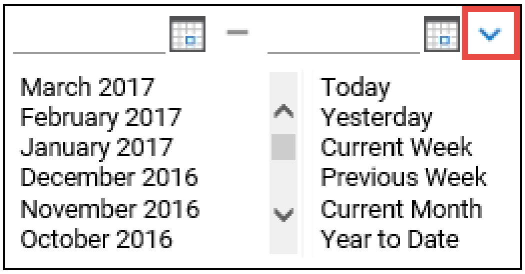


3. From the **Document Types** section, do one of the following:
   - Select the Document Type Group containing the type(s) of document(s) you want to retrieve (scroll down to see all Document Types Groups)
   - Select the Document Type(s) to be included in your search. To select multiple Document Types, use one of the following methods:
     - Press **Shift** or **Ctrl** as you click individual Document Types.
     - Click on the Document Type Group heading to select all of the Document Types in the group. Click the heading again to deselect all Document Types.
4. In the Keyword Type fields provided, type any Keyword Values by which you want to limit your search. You can also use the date fields above the **Keywords** tab to limit your search by Document Date.

5. Click the **Notes** tab of the navigation panel.



6. Enter your search parameters into the appropriate fields, which are described in the following table:

Field	Description
Note Text	Type the note text for which you want to search.
Created on	Enter a date range to limit your search to notes created within that range. You can use the corresponding calendars to select a date. You can also specify a date or date range by clicking the toggle date range options arrow in the upper right of the date specification area to display available options:  Select an item from either list. The **To Date** and **From Date** fields automatically populate according to your selection. If no range is specified, OnBase searches for notes created on any date within the selected Document Type(s).

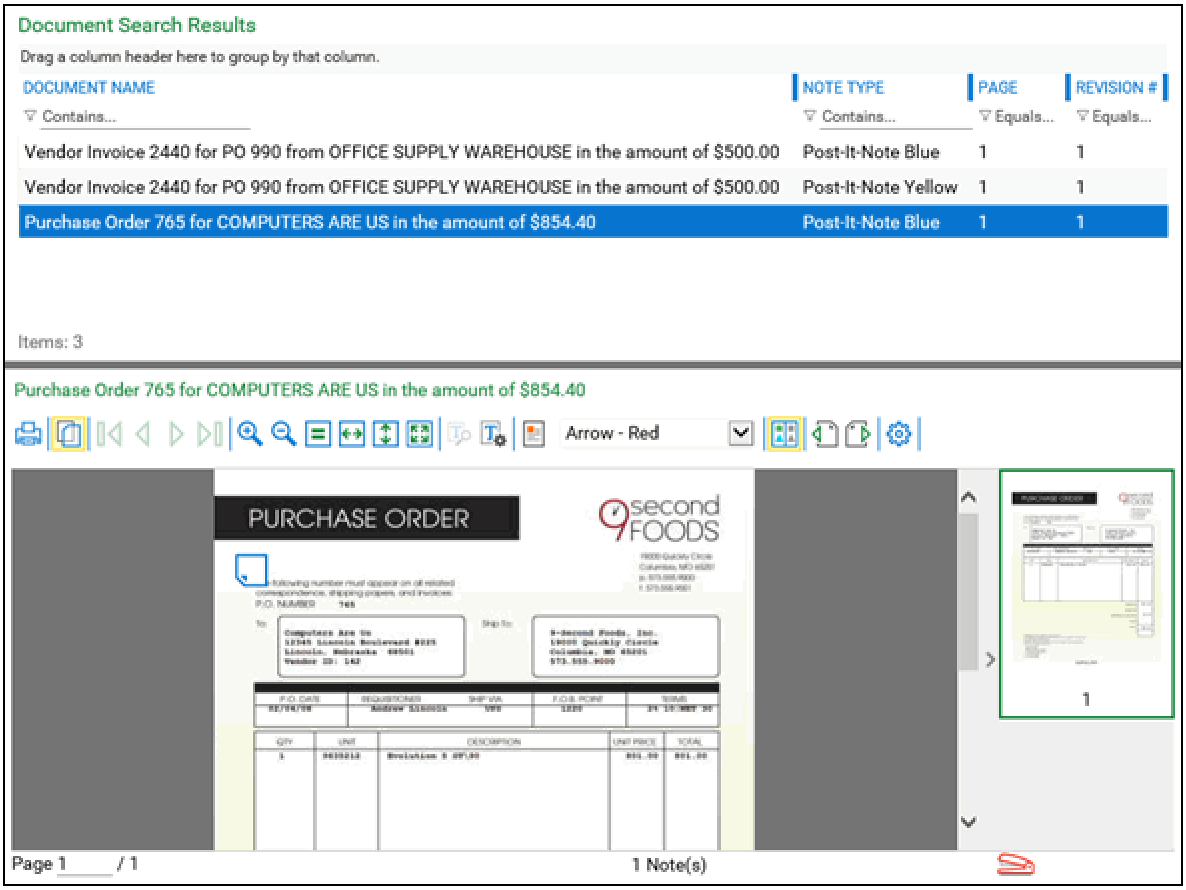
Field	Description
Note Owner	Select the OnBase user who created the note you are searching for. If no user is specified, OnBase searches for notes created by any user within the selected Document Type(s). **Note:** This drop-down list will only display the first 500 entries. In order to view other entries, you can enter one or more characters into this field to filter the drop-down list.
Note Types	Select the Note Type you are searching for. If no Note Type is specified, OnBase searches for notes of any type within the selected Document Type(s).

7. Click **Search**. When the search is finished, OnBase displays all matching documents in a Document Search Results list.

Note: If no documents match your criteria, the Document Search Results list displays **No items to display**.

Each listed result displays the document name, the note type, the page number where the note is located, and the revision number of the document. Navigate through multiple pages of results using the list's toolbar buttons.

8. If there is only one document listed, the document opens in the Viewer automatically; otherwise, open a document by double-clicking it from the Document Search Results list. The document is displayed in the Document Viewer.



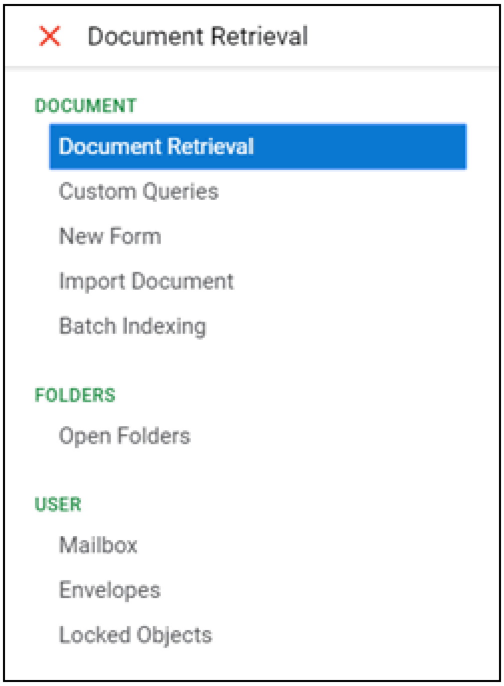
Note: To open multiple documents at the same time, open subsequent documents in a new window. For more information, see Open in New Window on page 104.

Document Retrieval Using External Text Search

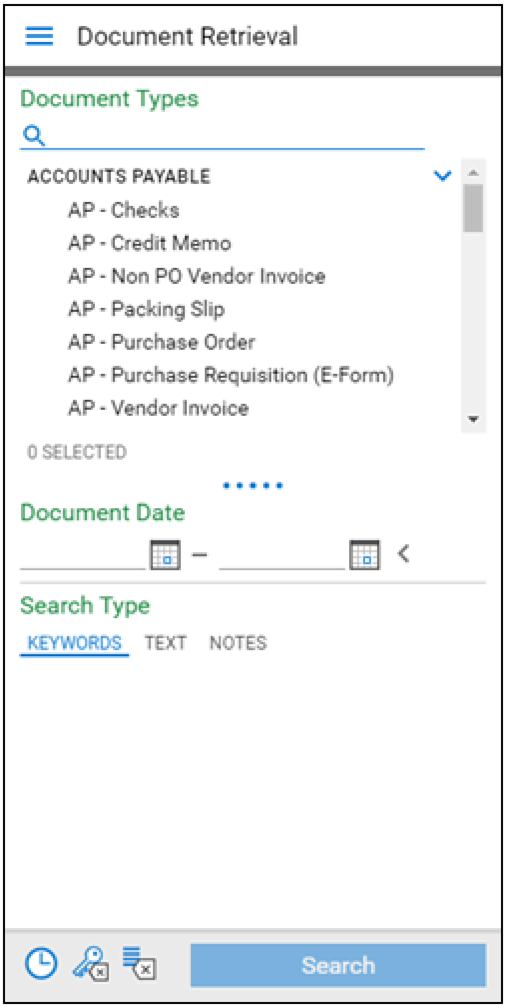
If you have sufficient privileges, you can search for specific text in a text-based document assigned to a Document Type or Document Type Group.

To retrieve documents using external text search:

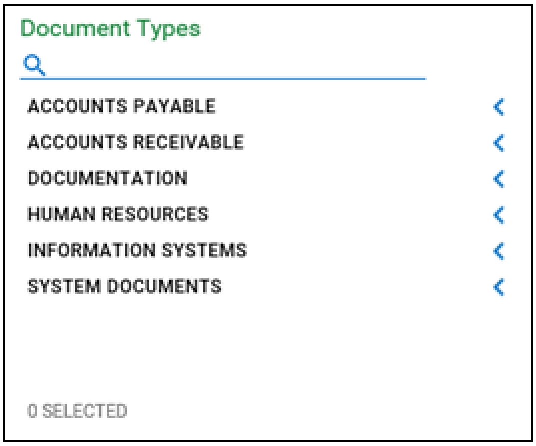
1. Select the Main Menu button. The Menu list is displayed.



2. Select **Document Retrieval** from the menu. The **Document Retrieval** information is displayed in the navigation panel.

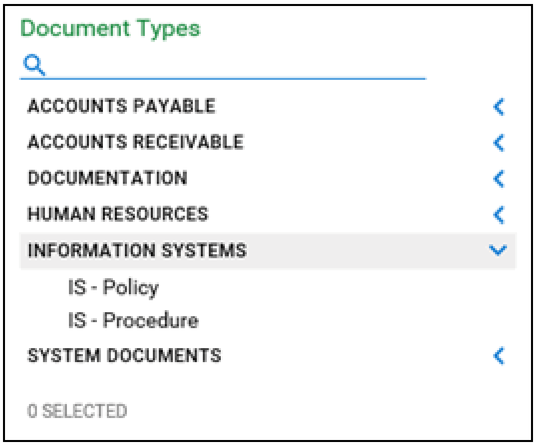


3. Select a Document Type from the **Document Types** section. Depending on how the Web Client has been customized, the Document Types may be collapsed under their corresponding Document Group.

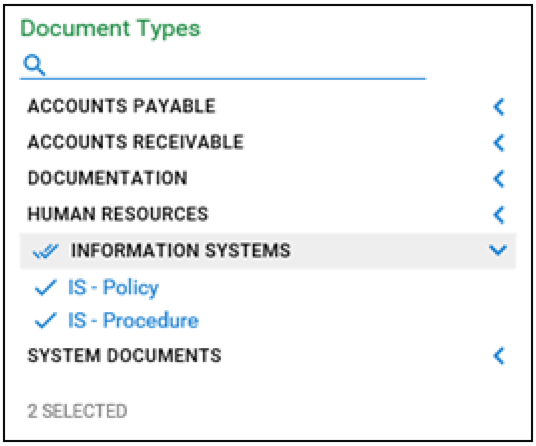


Click the drop-down arrow to expand a Document Type Group and view the document types in each group.

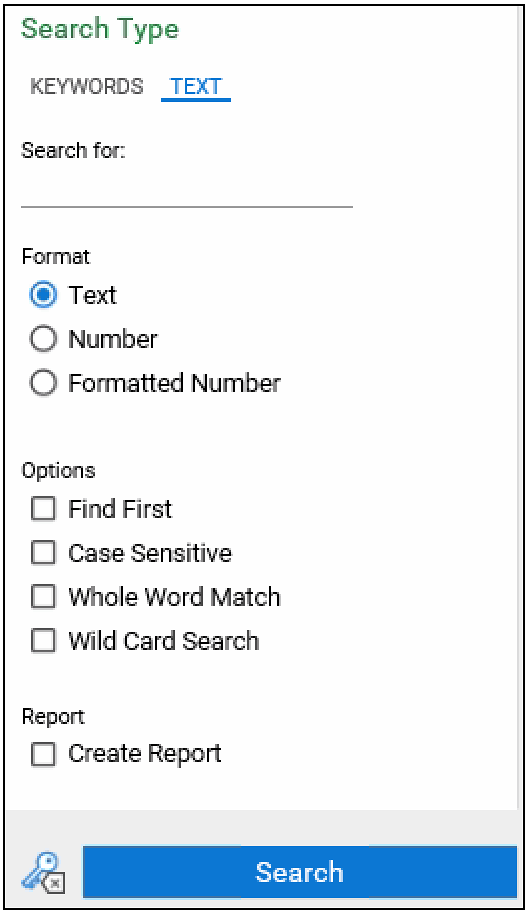
Tip: You can also use the keyboard to expand and collapse a Document Type Group. Select the Document Type Group, then press the **Right Arrow** key to expand or the **Left Arrow** key to collapse the Document Type Group.



4. From the **Document Types** list, select the Document Type(s) to be included in your search. To select multiple Document Types, use one of the following methods:
   - Press **Shift** or **Ctrl** as you click the documents to search.
   - Group the Document Types, and then select the Document Group name to select all documents in that group.



5. Click the **Text** tab in the panel. The external text search options are displayed.



6. In the **Search For** field, type the text string you want to search for. The string must contain at least two characters, and at least one character in the string must be a letter or a number.

7. Select a search type.
   - **Text** - Searches for alphanumeric text.
   - **Number** - Searches for numeric values and allows the use of the following operators to limit the search: **=**, **>**, **<**, **=>**, and **<=**. You can use **and**, **or**, and **to** as operators to search for a range of values. For example, type **2008 and 2009** to find documents containing both 2008 and 2009.

Caution: If you are searching for an exact number that is part of an alphanumeric text string, then the number will not be found. For example, if you search for **001** and the actual text is **ABC001**, then the value will not be found.

   - **Formatted Number** - Searches for numeric values that use formatting characters. For example, to search for all Social Security Numbers greater than 800-00-0000, type **> 800-00-0000** in the **Search String** field. You can use this option with following operators to limit your search: **=**, **>**, **<**, **=>**, and **<=**. The **to** operator can also be used to search for a range of values. For example, type **800-00-000 to 900-00-0000** to find documents containing values within this range.

Note: When you search for formatted numbers greater or less than the entered search string, formatted numbers followed by periods are not included in the search results. For example, if the formatted number is the last word in a sentence, then it will be omitted as a result.

8. Select one of the following options if necessary:
   - Select the **Find First** check box to limit the number of hits in each document search to one, which will limit search time. If **Finds First** is not selected, each document is searched until all hits are found.
   - Select the **Case Sensitive** check box to return only matches that have the same capitalization as the text string search criteria.
   - Select the **Whole Word Match** check box to match only a text string that is the exact word (not just merely characters matching the search criteria). If there are any spaces within the text string, the **Whole Word Match** check box will be unavailable.
   - Select the **Wild Card Search** check box to include wild card characters in your text string search criteria.

Note: These options are not available for Number and Formatted Number search types.

9. To generate a report of the text search criteria and results, select the **Create Report** check box. Enter the name of the report in the **Report Description** field. Enter the number of lines of text to show above and below the found text in the **Lines Before** and **Lines After** text fields.

10. Click the **Search** button in the toolbar.

    OnBase displays a Document Search Results list, which provides a link to each page that contains the text string, as well as the number of instances, or hits, per document.

Note: If no documents match your criteria, the Document Retrieval list displays **No documents found**.

11. Click a page number to display that hit in the Document Viewer. To display the hit in a new window, right-click the page number and select **Open in New Window**.

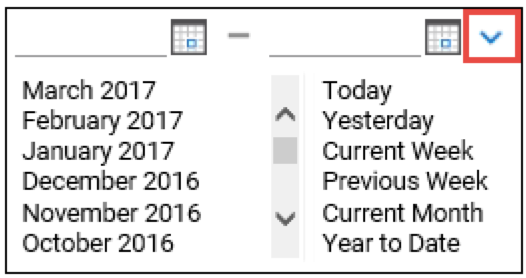
Note: If the selected document is displayed using an image rendition, the hits will not be highlighted on the document. The hits will only be highlighted when the selected document is displayed using a text rendition.

Document Retrieval by Document Date

When retrieving documents, you can limit your search to documents with a specific Document Date or within a certain date range. You can limit results by date when performing standard searches by Keyword Value, external text searches, and note searches. The Document Date is assigned to all documents upon import.

Note: See Document Retrieval by Keyword Value on page 65 and the Document Properties topic, which provides clarification on Document Date vs. Date Stored.

1. Specify the appropriate date(s) in the **From** and/or **To** fields.
2. You can also specify a date or date range by clicking the in the upper right of the date specification area to display available options:



3. Select an item from either list. The **To Date** and **From Date** fields automatically populate according to your selection.

Note: The character used to separate the parts of the date should be appropriate to your locale. OnBase recognizes slashes (/), commas (,), and periods (.) as date separators.

Tip: If you often find yourself using the same Document Date or date range, you can provide defaults for the **From Date** and **To Date** fields. See Changing the Retrieval Default Date on page 45.

Date Range Parameters and Corresponding Results

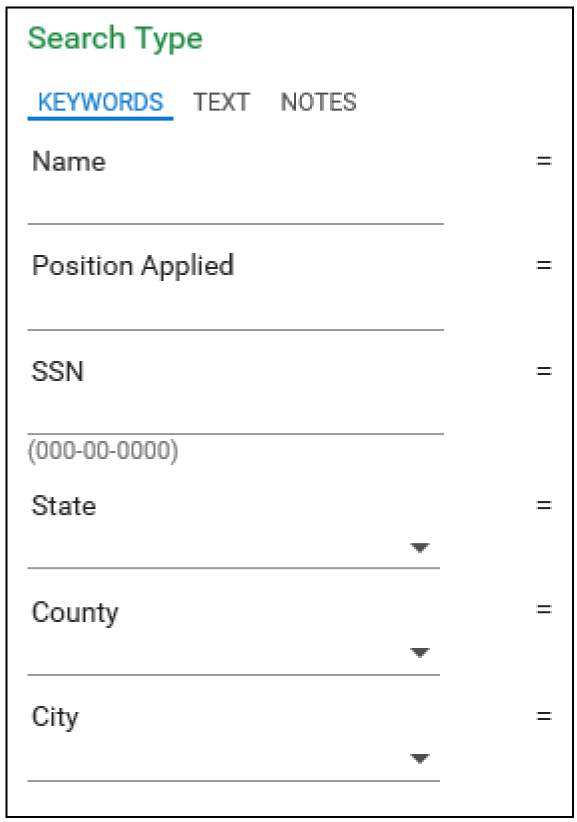
Date Range Parameters	Result
From Date: left blank **To Date:** left blank	Retrieves all documents with document dates from 1/1/1753 through the current date.
From Date: left blank **To Date:** valid date	Retrieves all documents with document dates from 1/1/1753 through the date in the To field.
From Date: valid date **To Date:** left blank	Retrieves all documents with document dates from the date in the **From Date** field through the current date.

Date Range Parameters	Result
From Date: valid date < **To Date:** valid date	Retrieves all documents with document dates from the date in the **From Date** field through the date in the **To Date** field. Note that a valid date can be any date from 1/1/1753 to any date in the future. The only stipulation is that the **From Date** date cannot be greater than the **To Date** date.
From Date valid date = **To Date** valid date	Retrieves all documents with the specified document date.

Keyword Types Relationship Examples in Document Retrieval

Cascading Data Set

A Document Type contains a Cascading Data Set that includes the **State**, **County**, and **City** Keyword Types. **State** is the parent, or root, Keyword Type in the Cascading Data Set. **County** is a child to **State**, and **City** is a child to **County**. These Keyword Types appear in the order of their parent/child relationship in the **Document Retrieval** window:



When retrieving documents, you must select values for Keyword Types in the order of their parent/child relationship. In this example, the drop-down list for the **County** Keyword Type is empty until a **State** value has been selected. The drop-down list for the **City** Keyword Type is empty until a **County** value has been selected. This is because the three Keyword Types are related to one another, and meant to be used in conjunction with one another.

Note: Child Keyword Values are not automatically corrected after modifying the parent Keyword Value. Using the above example, a user selects a **State**, **County**, and **City** Keyword Value. The user then modifies the **State** Keyword Value. The selected **County** and **City** Keyword Values are not child Keyword Values of the new **State** Keyword Value. The selected **County** and **City** Keyword Values are not cleared from the **Keywords** panel.

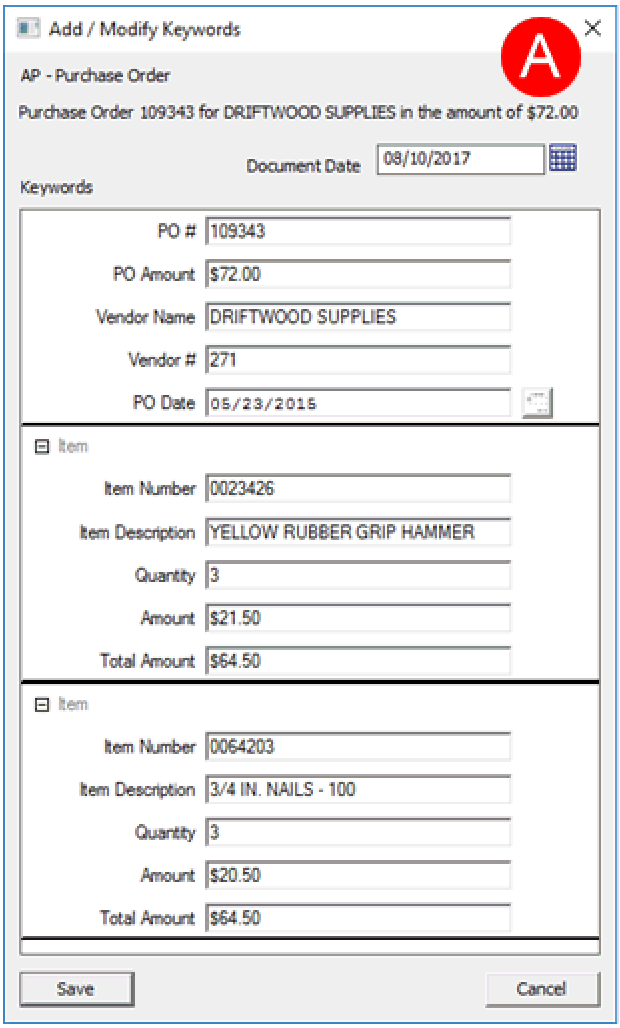
Multi-Instance Keyword Type Group

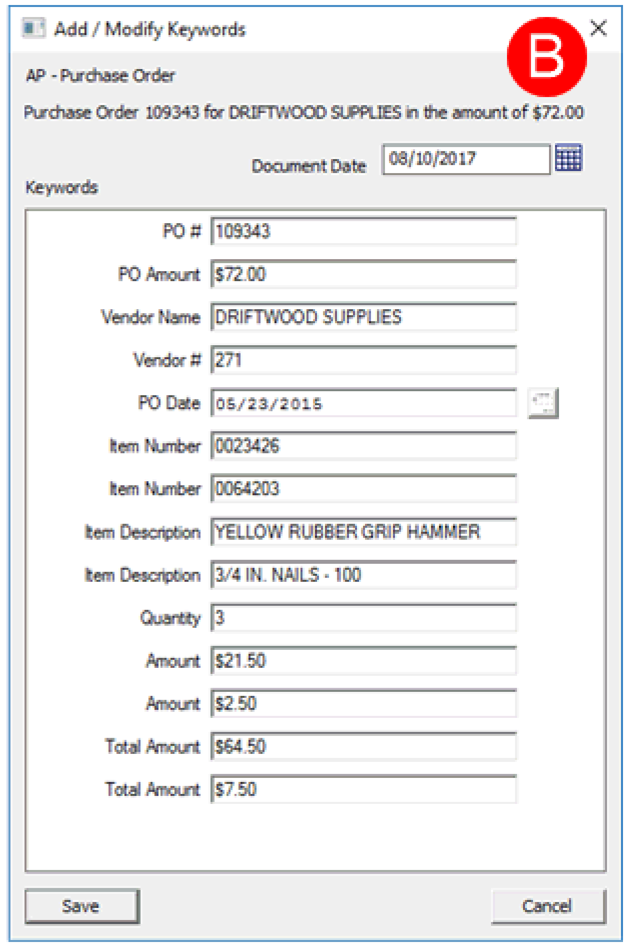
A Document Type called **AP - Purchase Order** contains a Multi-Instance Keyword Type Group called **Item** that includes the Keyword Types **Item Number**, **Item Description**, **Quantity**, **Amount** and **Total Amount**. A Multi-Instance Keyword Type Group was configured for the Document Type, because a purchase order is likely to contain more than one item, each requiring a separate group of Keyword Values.

If you were to search for the Keyword Value **0023426** for the **Item Number** Keyword Type and the Keyword Value **3/4 IN. NAILS - 100** for the **Item Description** Keyword Type, a document retrieval would only retrieve documents that contained both Keyword Values either in the same instance of a Keyword Type Group or as standard Keyword Values values (i.e., values that are not part of a Keyword Type Group). It would not retrieve documents that only contained the values collectively across different Keyword Type Groups.

For example, the following documents contain the same Keyword Values but were indexed differently:

- Document A was configured with the **Item** Multi-Instance Keyword Type Group and was indexed with two Keyword Type Group instances.
- Document B was configured with loose Keyword Types and was indexed with multiple values for **Item Number**, **Item Description**, **Amount** and **Total Amount**.





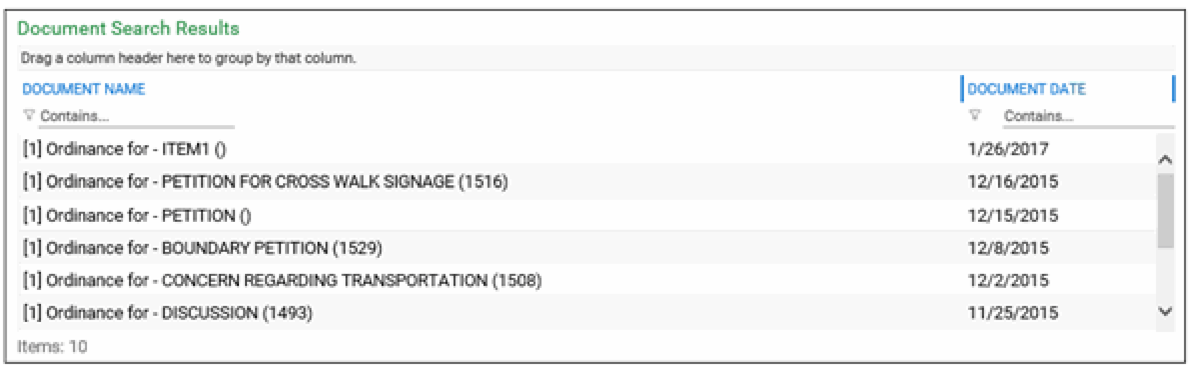
A single document retrieval for both **Item Number** Keyword Value **0023426** and **Item Description** Keyword Value **3/4 IN. NAILS - 100** would not find Document A, since the Keyword Values **0023426** and **3/4 IN. NAILS - 100** are not part of the same Keyword Type Group instance. It would find Document B, since those values are not tied to any Keyword Type Group.

Document Search Results List

The Document Search Results list is a list of all documents that meet the search criteria in any of the following searches or contexts:

- Document Type
- Document Date
- Keyword Value
- Note
- Folder
- Envelope
- Custom Query

Each item in a Document Search Results list identifies the Auto-Name assigned to the document. How documents are named varies between Document Types. The following example illustrates the appearance of a Document Search Results list.



You can change the height of the Document Search Results list by clicking and dragging the blue bar at the bottom of the Document Search Results list. If your system is configured to save the Document Search Results list height, the new height of the Document Search Results list will be saved as the default and will automatically open to that height the next time you execute a Document Search.

If the document names have been configured to use font attributes such as bold, italics and color, these attributes are visible in the Document Search Results list.

Note: The number of documents found in the search is displayed at the bottom of the list. If the search returns more documents than allowed by your system administrator, the document counter does not increase past the maximum and a message is displayed stating the following: **Results were limited, please refine your search.**

Filtering Documents in the Search Results List

You can filter documents in the Document Search Results list by either Document Date or Document Name. If the Document Search Results list displays more than 1000 results, you can use the advanced filtering mode to filter the list.

Filter Documents by Document Date

To filter documents by Document Date in the Search Results list:

1. From the **Document Date** column, click the filter icon.

   The filter options drop-down list is displayed.

2. Select a filter option from the list. Options include:

Option	Description
On	Filters documents on a specific date. Enter the date in the Contains field.
Not on	Filters documents that are not on a specific date. Enter the date in the Contains field that is not to be included in the filter.
After	Filters documents after a specified date. Enter the date in the Contains field.
Before	Filters documents prior to a specified date. Enter the date in the Contains field.
Today	Filters documents based on today's date. Today's date is automatically entered in the Contains field.
Yesterday	Filters documents based on yesterday's date. Yesterday's date is automatically entered in the Contains field.
This Month	Filters documents that were created in the current month.
Last Month	Filters documents that were created in the prior month.
Clear Filters	Clears any filters that were applied to the Document Date column.

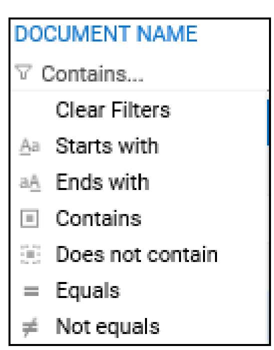
3. Enter a search term in the field next to the filter option icon and press **Enter**. The Search Results list displays the results of the filter.

Filter Documents by Document Name

To filter documents by Document Name in the Search Results list:

1. From the **Document Name** column, click the filter icon.

The filter options drop-down list is displayed.



2. Select a filter option from the list. Options include:

Option	Description
Starts with	Filters documents based on the letter or letters they start with. Enter the letters to filter in the Contains field.
Ends with	Filters documents based on the letter or letter they end with. Enter the letters to filter in the Contains field.
Contains	Filters documents based on the word or words contained within the document name. Enter the words to filter in the Contains field.
Does not contain	Filters documents based on the word or words that are not contained within the document name. Enter the words to filter in the Contains field.
Equals	Filters documents based exactly on the word or words entered in the Contains field.
Not equals	Filters documents according to a word or words that are not contained in the document name.
Clear Filters	Clears any filters that were applied to the Document Name column.

3. Enter a search term in the field next to the filter option icon and press **Enter**. The Search Results list displays the results of the filter.

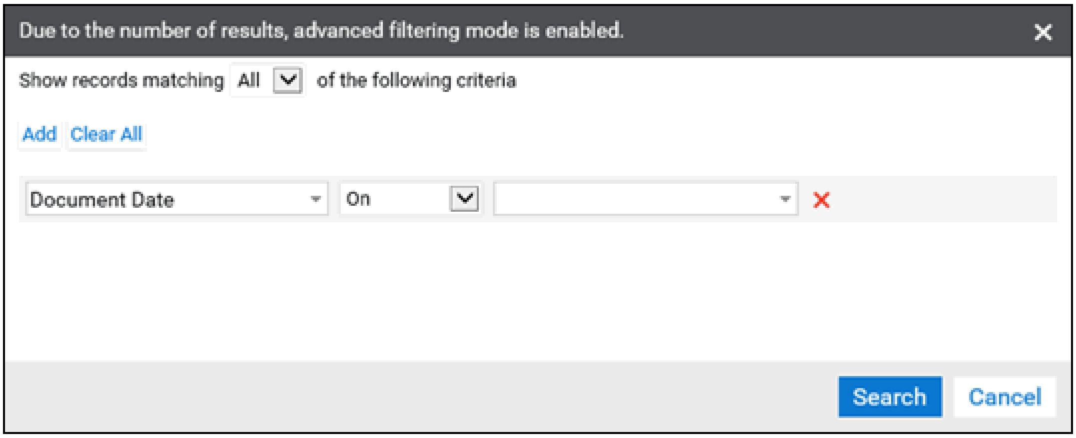
Filter Documents with Advanced Filtering Mode

If a Search Results list displays more than 1000 results, you must use the advanced filtering mode to filter the documents in the list.

To use the advanced filtering mode in the Search Results list:

1. From a column header in a Search Results list displaying more than 1000 results, click the filter icon.

The advanced filtering mode dialog box is displayed.



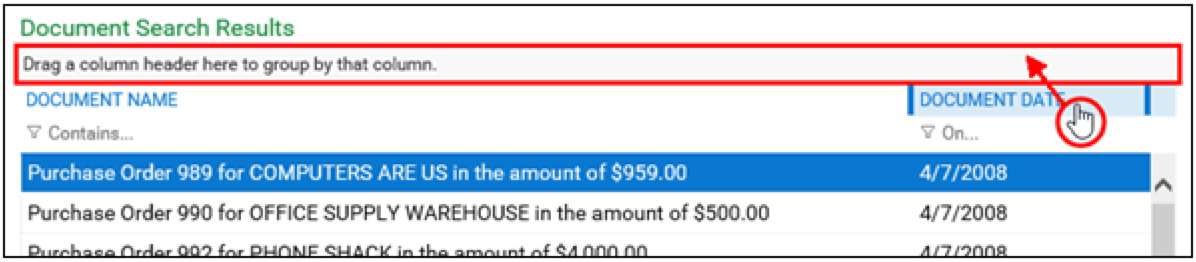
2. Select whether to show records matching **All** or **Any** of the criteria set in this dialog box.
3. Define each line of filter criteria using the provided fields:
   a. Select a column name to search within that column.
   b. Select a filter option to define how to filter the selected column.
   c. Enter or select a value to search for in the selected column.
4. To include additional criteria in the filter, click **Add**. A new line of fields is added to the list of criteria.
5. To remove criteria from the filter, click the **X** icon on each line, or click **Clear All** to remove all criteria.
6. When you have defined all of the criteria for the filter, click **Search**. The advanced filtering mode dialog box is closed, and the Search Results list displays the results of the filter.

Grouping Columns in the Document Search Results List

You can group items in the Document Search Results list by dragging column headers such as **Document Date** or **Document Name** to the space above the list. For example, documents in the list can be grouped according to the specific date a document was created, or by the name of documents.

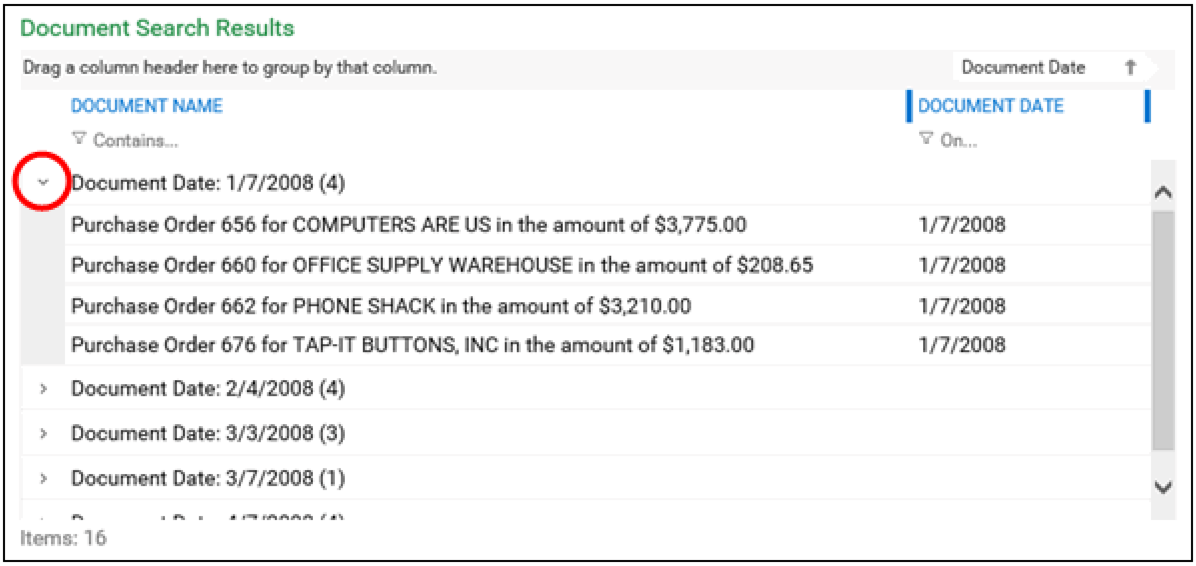
To group documents:

1. Click and hold a column header in the Document Search Results list.
2. Drag the column header to the grouping space at the top of the Search Results list, and then release the mouse button.



The items in the Search Results list are grouped according to the column header. By default, the document groups are collapsed.

3. Click the arrow next to a group to expand it and display the documents in that group.



4. To sort the order of the groups displayed in the list, click the up or down arrow icon next to the column header in the grouping space.

5. To stop grouping documents by a column header, click the **Remove Grouped Column** icon next to the column header in the grouping space.

Viewing Documents

Open a document by double-clicking its name or, for text-based searches, by clicking the page number. The document is displayed in the Document Viewer.

You can also select multiple documents from this list and right-click to access options.

Note: If you have multiple documents selected but do not have consistent privileges for the corresponding Document Types, only the options you can apply to all selected documents are available. The unavailable options are grayed out.

Previewing Documents in the Thumbnail Viewer

The thumbnail viewer lets you quickly preview multiple text or image documents from the Document Search Results list by displaying thumbnails of the first page of each document. When you find the document you want, you can open the document by clicking its thumbnail.

Note: The thumbnail viewer may not be available, depending on your system's setup.

To preview documents in the thumbnail viewer:

1. From the Document Search Results list, select the documents that you want to preview. You can hold **Ctrl** and click to select multiple individual documents, or you can hold **Shift** and click to select a range of documents between the first and last document you click.
2. Right-click within the list and select **View Thumbnails**. The thumbnail viewer displays the thumbnails and Auto-Names of the selected documents.

Note: If **No Image Available** is displayed instead of a thumbnail, then the document's file format does not allow it to be represented as an image. The thumbnail viewer cannot display thumbnails of OLE document or video and media documents.

3. To open a document, click its thumbnail. The document is opened in a new window.

Printing Thumbnails in the Thumbnail Viewer

If you have sufficient rights, you can print the thumbnails displayed in the thumbnail viewer.

To print the displayed thumbnails in the viewer, press **Ctrl + P**. Your browser's print dialog box is displayed. Choose your preferences and print the page.

Changing Thumbnail Viewer Options

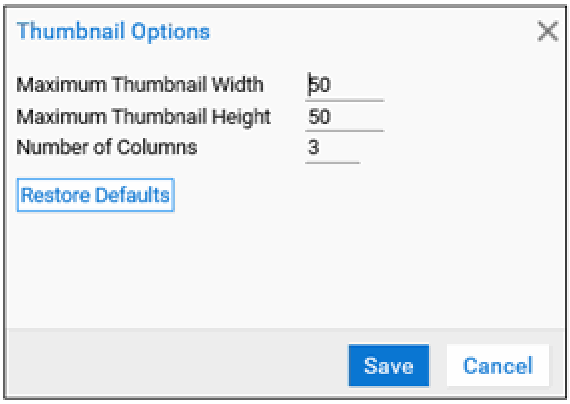
If the thumbnail viewer allows customization, you can configure how thumbnails are displayed. The thumbnail viewer lets you change the thumbnail size, the preview size (if applicable), and the number of columns displayed.

Note: If the **Thumbnail Options** button is unavailable in the thumbnail viewer, then customization has been disabled. If you are having trouble previewing documents and the **Thumbnail Options** button is unavailable, ask your system administrator to adjust the viewer's display settings.

To configure the thumbnail viewer options:

1. From the thumbnail viewer, click the **Thumbnail Options** button.

The **Thumbnail Options** dialog box displays the viewer options and their current values.



2. Adjust the values as needed. Options are described in the following table:

Option	Description
Maximum Thumbnail Width	In pixels, type the maximum width for thumbnails. For example, if you type **50**, thumbnails will never be wider than 50 pixels. Valid values range from **20** through **500**. **Note:** This setting is not used by documents that have thumbnail image renditions available. For faster loading, the thumbnail viewer displays these renditions without resizing them. Thumbnail image renditions are created by Document Import Processes and scan queues that have the **Create Image Thumbnails On Commit** option enabled.
Maximum Thumbnail Height	In pixels, type the maximum height for thumbnails. For example, if you type **50**, thumbnails will never be taller than 50 pixels. Valid values range from **20** through **500**. **Note:** This setting is not used by documents that have thumbnail image renditions available. For faster loading, the thumbnail viewer displays these renditions without resizing them. Thumbnail image renditions are created by Document Import Processes and scan queues that have the **Create Image Thumbnails On Commit** option enabled.
Number of Columns	Type the maximum number of columns you want the thumbnail viewer to use when displaying thumbnails. Valid values range from **1** through **7**.

3. Click **Save** to save your changes and close the dialog box.

Restoring Default Thumbnail Viewer Options

To restore the thumbnail viewer options to their default values, in the **Thumbnail Options** dialog box, click the **Restore Defaults** button.

Open in New Window

You can view multiple documents at the same time using the **Open in New Window** right-click option.

To open documents in a new window:

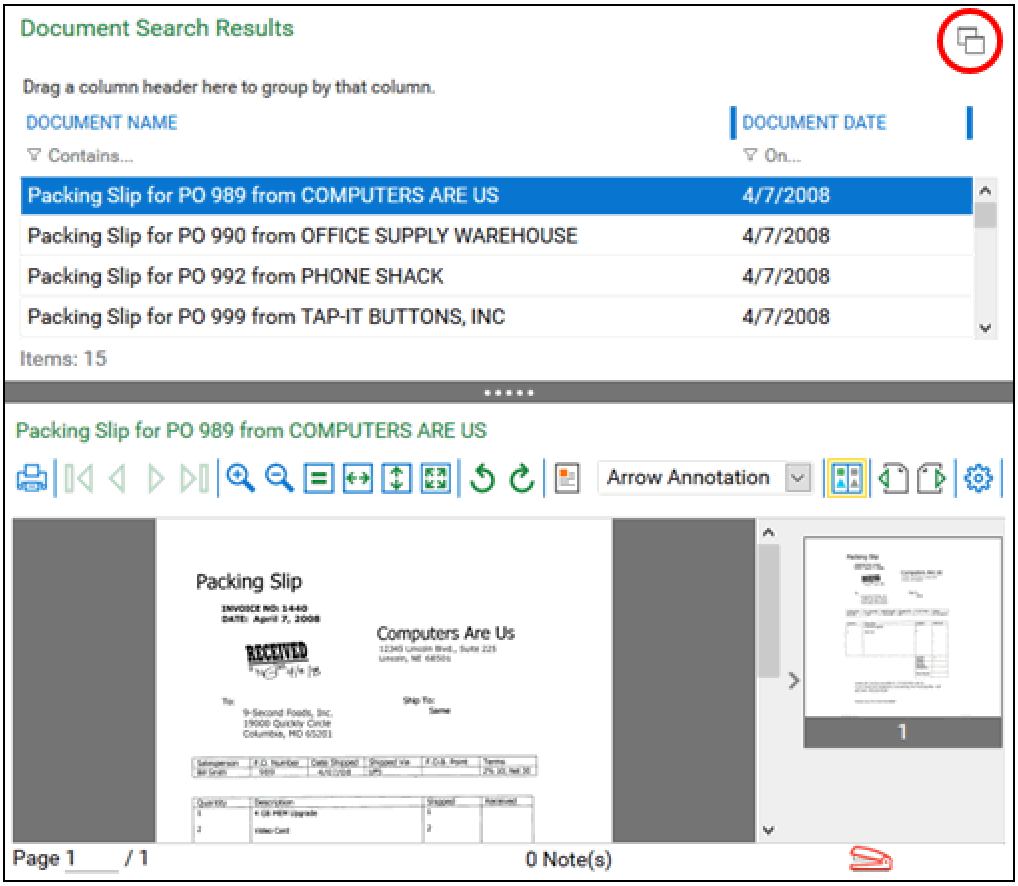
1. Select up to five documents from the Document Search Results list.
2. Right-click and select **Open in New Window** from the options menu. The selected documents are opened in separate windows.

Note: You cannot view documents retrieved from a text-based search in multiple windows; they must be viewed one at a time.

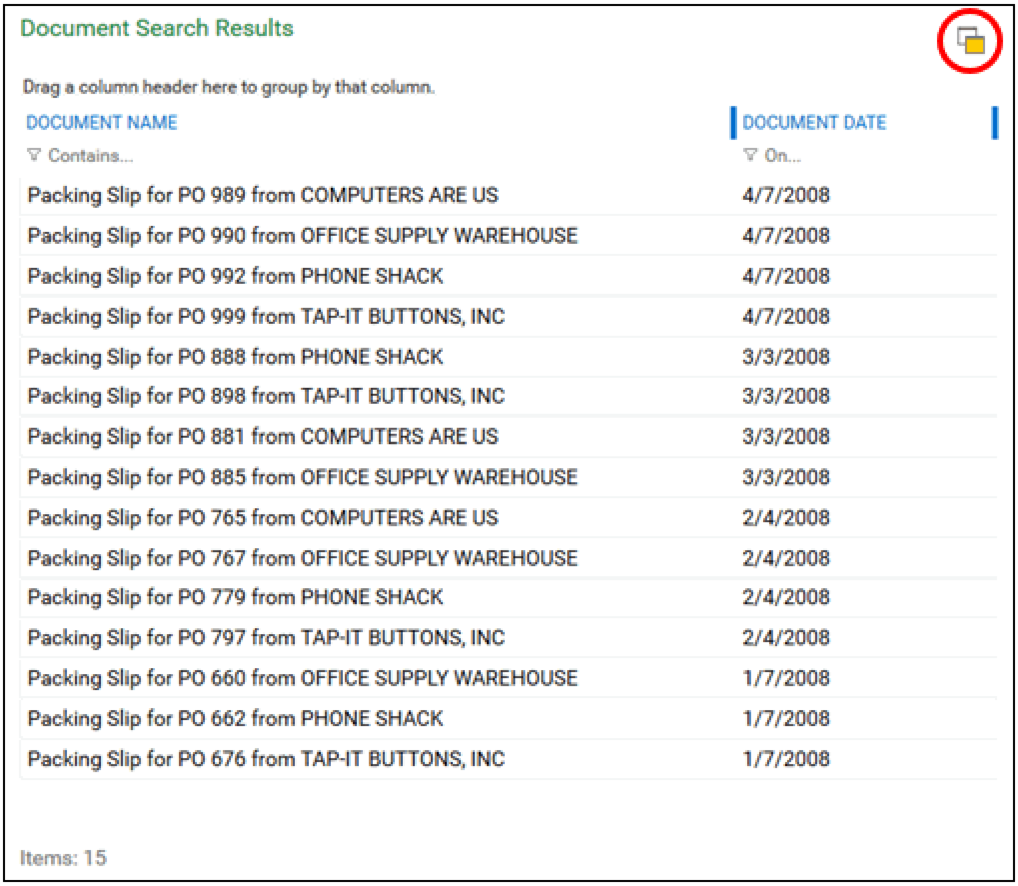
Open in New Window by Default

You can configure the Document Search Results list to always open documents in a new window, instead of opening in the Document Viewer below the list.

To always open documents in a new window, click the **Open in New Window** toggle button in the results list pane.



The Document Viewer is removed, and the button icon changes to indicate the setting is enabled. When you open a document from the list, it will be opened in a new window.



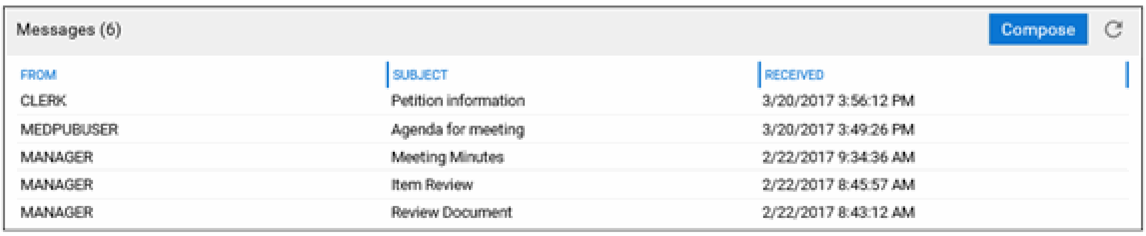
Click the **Open in New Window** button again to toggle back to opening documents in the Document Viewer. The button icon changes back to indicate the setting is disabled.

Sorting Select Lists

Certain screens contain select lists that can be sorted. See the following sections for information on how to sort information in these lists.

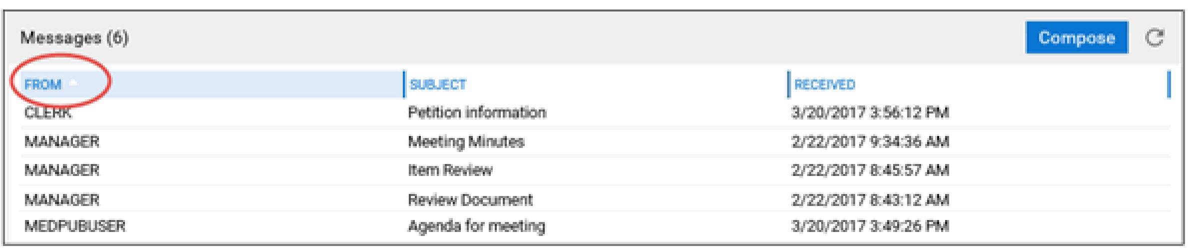
Select List Sorting

Many select lists can be sorted by column in ascending or descending order. The following example shows a list of items that can be sorted in the user's internal mail inbox:



To sort items in the select list by a specific column, click the column's header:

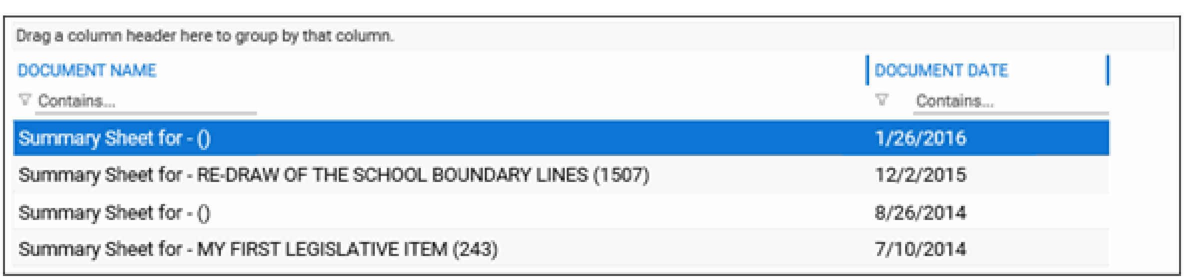
The items in the list are sorted in ascending order, which is indicated by the triangle shown in the column header:



To sort the list by descending order, click the column's header again.

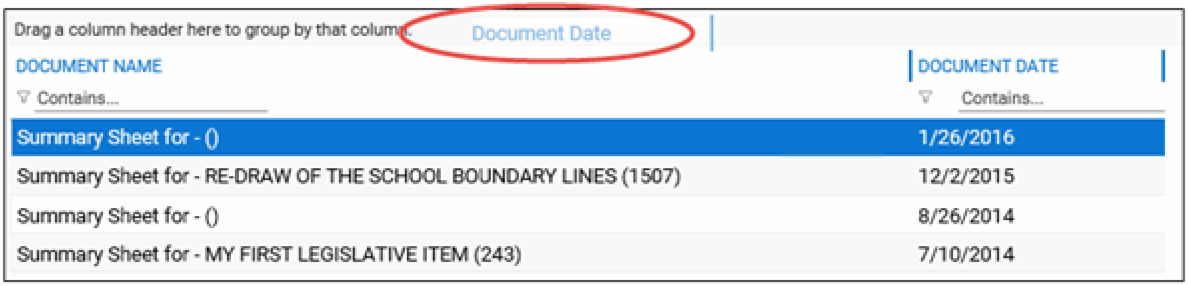
Hierarchical Select List Sorting

Some select lists allow you to sort by grouping multiple columns together in a hierarchical order. The following example shows one of these lists:

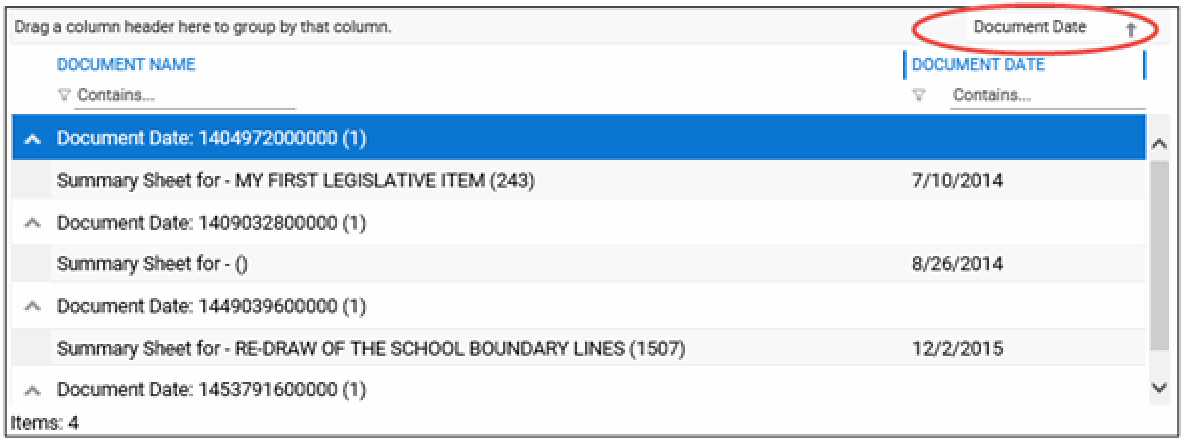


This select list can be sorted by column in ascending or descending order, and the columns can also be grouped in a hierarchical order to sort the list even further. To group columns, perform the following steps:

1. In the document select list, click and drag the column heading into the grouping area above the list:

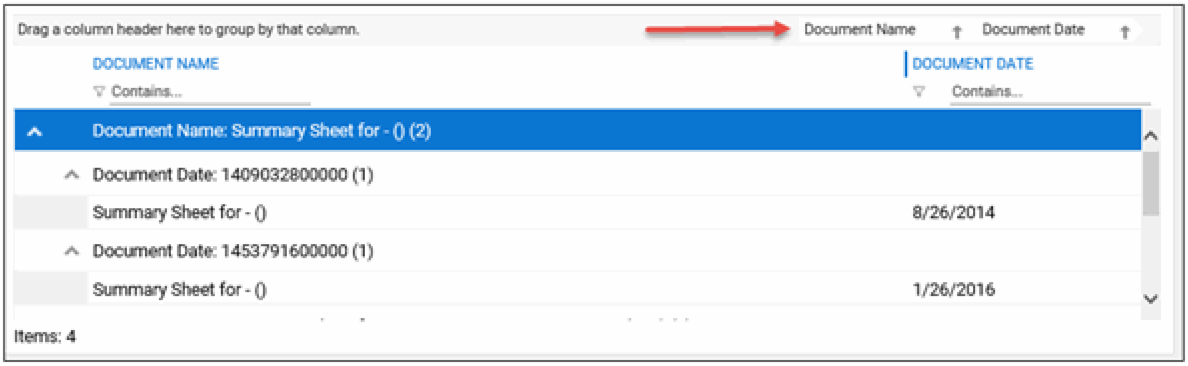


The results are grouped based on the current values in the column you selected:



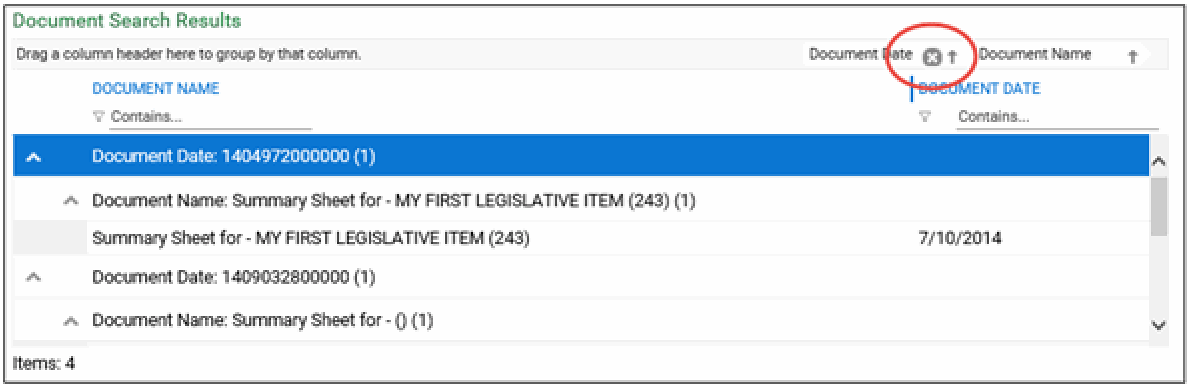
- To collapse the grouped results, click the arrow (**^**) next to the group you want to collapse.
- To expand a group, click the arrow (**>**) next to the group you want to expand.

2. To sort the list further, drag additional column headings into the grouping area:



In the example above, the results are sorted first by the **Position Applied** column, then by the **Name** column, and finally by the **Document Type** column.

3. To remove a column from the grouped results, hover over the column name in the grouping area and click the corresponding **X**:



Toolbars in the Web Client

There are several different toolbars available in the Web Client. Toolbar buttons are designed to make navigation and document management an easy, point-and-click operation. The toolbars that are available to you differ based on which Web Client type you are using: ActiveX, or HTML. If you are unsure of which Web Client type you're using, contact your system administrator for information.

See the following sections to learn about the toolbars that are available to you for the Web Client type you are using.

- ActiveX Web Client Toolbars on page 109
- HTML Web Client Toolbars on page 126

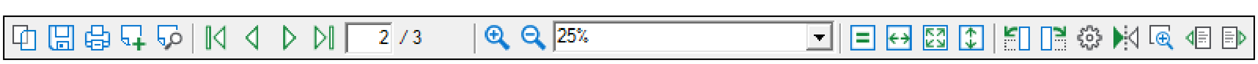
ActiveX Web Client Toolbars

See the following topics for information specific to toolbars in the ActiveX Web Client.

- Viewer Control Toolbar on page 109
- PDF Viewer Toolbar on page 111
- Notes Toolbar on page 112
- Notes List Toolbar on page 114
- Internal Text Search Toolbar on page 114
- Annotations Toolbar on page 118
- Column/Row Locking Toolbar on page 119
- Pages Toolbar - View Document Thumbnails on page 121

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

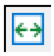
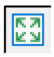
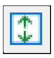
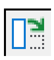
Viewer Control Toolbar



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

Button	Description
	**Overlay** applies an overlay to the document, if an overlay is present.

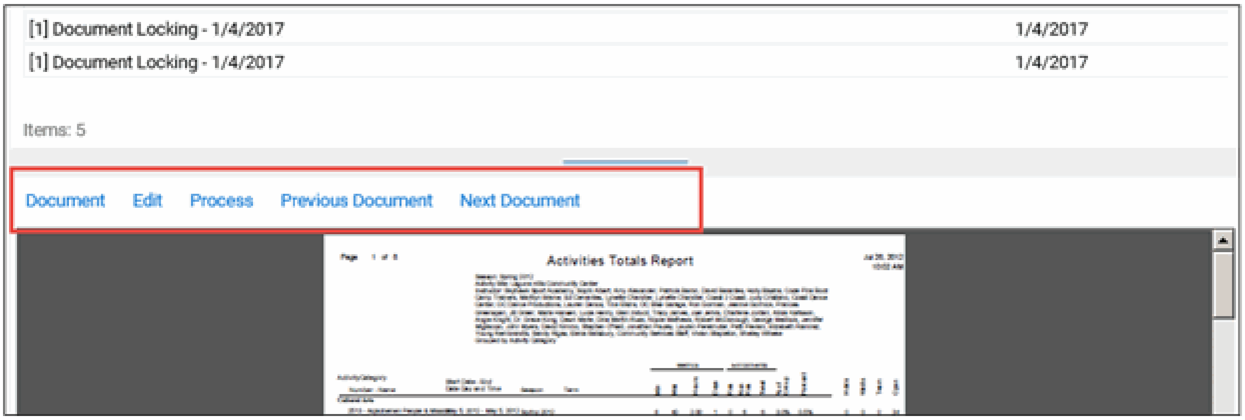
Button	Description
	**Save to File** displays the **Save to File** dialog box, allowing you to save documents outside of OnBase if you have appropriate user rights. **Note:** The ActiveX Web Client does not support the Windows protected mode. This could impact the location where you want to save files. See your system administrator for more information.
	**Print** displays the **Print** dialog box, if you have user rights to print the document.
	**Add Note** displays the **Add Note** dialog box, which displays note types you can add to the document.
	**View Note** displays the **View Note** dialog box, which displays a list of all notes on the document.
	**First Page** displays the first page of the document.
	**Previous Page** displays the preceding page of a multi-page document.
	**Next Page** displays the following page of a multi-page document.
	**Last Page** displays the last page of the document.
	Enter a page number in the **Go To Page** field to jump directly to a specific page.
	**Zoom In** magnifies the view of a document, reducing the portion that is visible. Every zoom increases magnification by one third.
	**Zoom Out** reduces the magnification of a document, increasing the portion that is visible. Every zoom reduces magnification by one quarter.
	**Sizing** options allow you to select a standard sizing option. Select a specific percentage of reduction or magnification (25%, 50%, 75%, 100%, or 200%), Fit Width, Fit Height, Fit Window, or True Size. Also displays the current magnification percentage whenever the **Scale | Zoom In** or the **Scale | Zoom Out** options are chosen in the right-click menu for the open document.
	**Actual Size** displays the document in its actual size (as it is stored in OnBase). Clicking this button sets the magnification to 100%. **Note:** This zoom level differs from True Size, which takes the monitor's and image's DPI into account when displaying the image.

Button	Description
	**Fit Width** resizes the document page so that its width is the same as the width of the document display area.
	**Fit Window** resizes the document page so that the entire page is displayed in the document display area.
	**Fit Height** resizes the document page so that its height is the same as the height of the document display area.
	**Rotate Left** rotates the document 90 degrees counterclockwise.
	**Rotate Right** rotates the document 90 degrees clockwise.
	**Options** enables you to set viewer options.
	**Scale to Gray** softens the contrast of text and image documents at zoom levels of less than 100%. This feature is most noticeable on black-and-white images, making it helpful for reading scanned documents containing text that is too dark or too light.
	**Magnify** turns the cursor into a magnifying glass that you can place over an area in a document. The area is displayed at 200% zoom in a separate view window next to the magnifying glass.
	**Previous Document** displays the previous document in a Document Results list
	**Next Document** displays the next document in a Document Results list.
	**Show Alternate Rendition** is available only for documents that are allowed to have multiple renditions. This button allows you to view a different rendition of a document when the document has multiple renditions. To view a list of the available renditions, click the black arrow. Select the rendition you want to view from this list.

PDF Viewer Toolbar

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

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



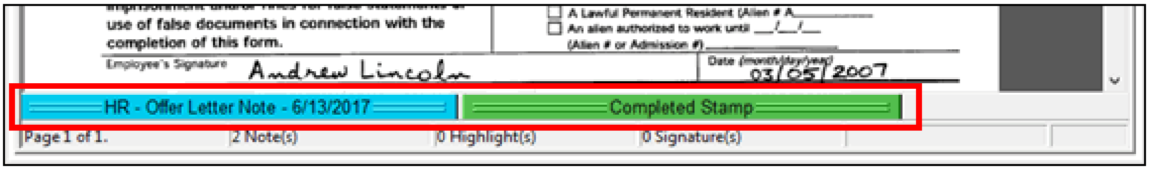
This toolbar provides you with many of the existing right-click menu options that are available for image and text documents, since the right-click menu is not accessible when viewing these documents.

Notes Toolbar

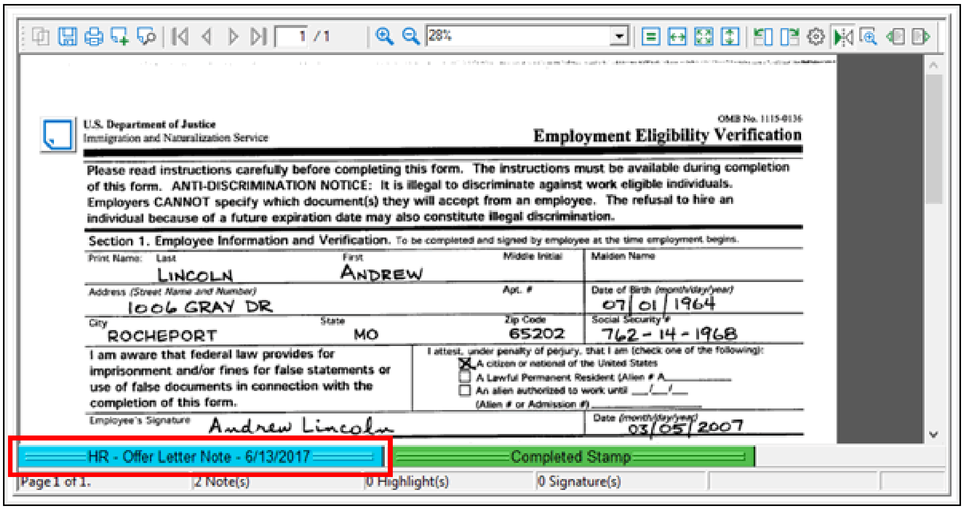
The **Notes** toolbar is a row of tabs representing notes and annotations on the current page. The toolbar is displayed along the bottom of the Document Viewer. You cannot undock and move this toolbar to another location.

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

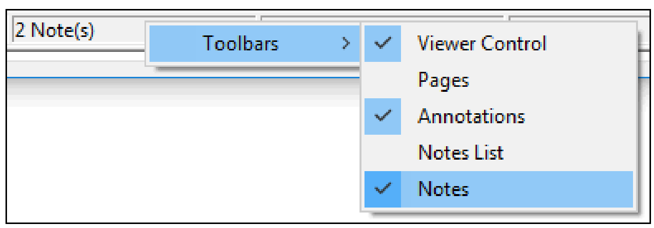
Note: If you are viewing a document that is locked by Records Management, you cannot create or modify notes.



Click a note tab to read the note or annotation.



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

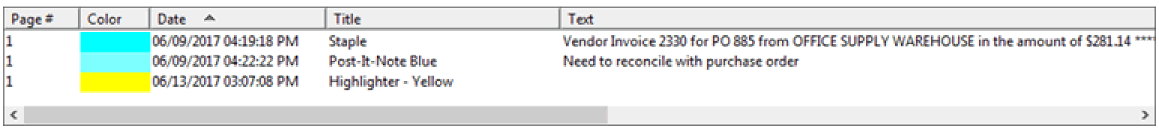


Note: HTML documents do not have toolbars. When you open an HTML document with one or more notes, OnBase displays the associated icon(s). Double-clicking an icon opens the note and displays its text. This action works only from HTML documents or from documents viewed in the HTML Web Client. Double-clicking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

Notes List Toolbar

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

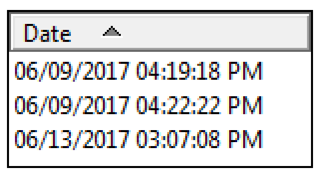
Note: The **Notes List** toolbar is only available in the ActiveX Web Client. It is also only available for image, text, and PCL documents.



Page #	Color	Date	Title	Text
1		06/09/2017 04:19:18 PM	Staple	Vendor Invoice 2330 for PO 885 from OFFICE SUPPLY WAREHOUSE in the amount of $281.14 ***
1		06/09/2017 04:22:22 PM	Post-It-Note Blue	Need to reconcile with purchase order
1		06/13/2017 03:07:08 PM	Highlighter - Yellow	

The following options are available in the Notes List:

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



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

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

Internal Text Search Toolbar

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

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

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

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

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

Button	Description
	**Text Search Options** limits your searches to one or more columns (character positions) or to a column index (a predefined text block). You can also specify whether the search should start from the beginning of the document or the current page. For more information, see Limiting Searches Using Text Search Options on page 116.
	**Find Previous** searches for the preceding occurrence of the specified string within the current text document.
	**Find Next** searches for the following occurrence of the specified string within the current text document.

Performing an Internal Text Search

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

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

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

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

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

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

Limiting Searches Using Text Search Options

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

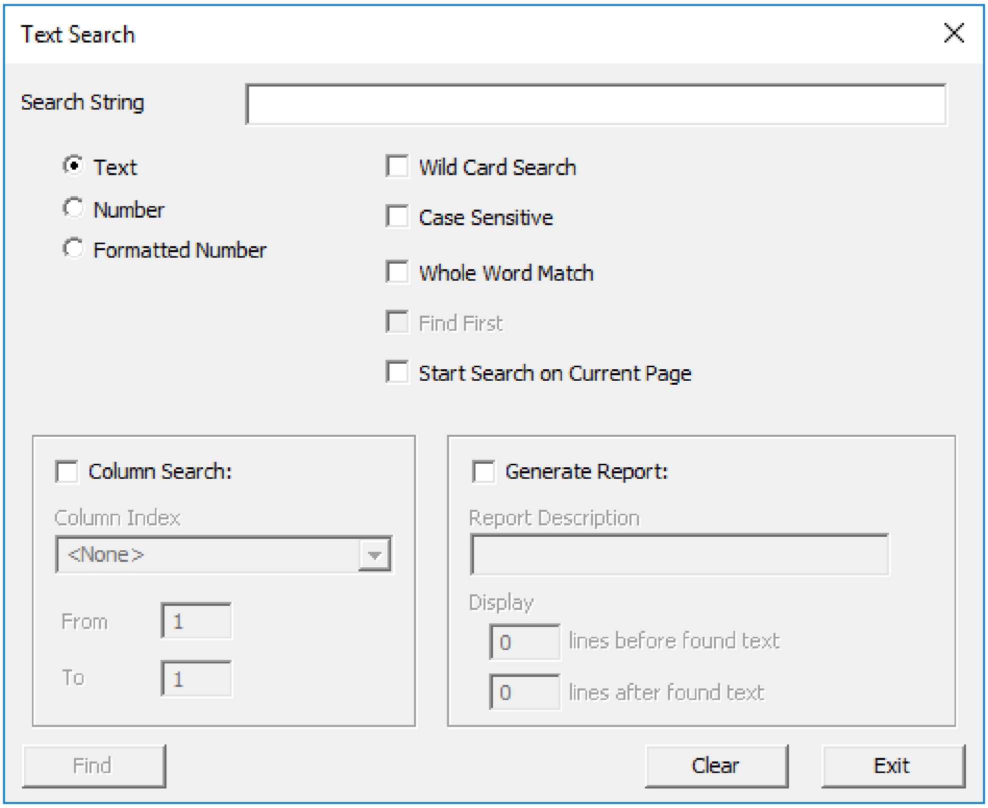
- If you know the string occurs somewhere between the current page and the end of the document, you can apply an option to start the search from the page you are currently viewing.
- If you know that the phrase you're looking for occurs only within a specific set of columns, you can limit the search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

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

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

To perform a search using text search options:

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



2. Enter your search term in the **Search String** field.

3. For a search type, select any of the following options:

Option	Description
Text	Searches for alphanumeric text.
Number	Searches for numeric values. You can use this option with the following operators to limit the search: **=**, **>**, **<**, **=>**, and **<=**. You can use **and**, **or**, and **to** as operators to search for a range of values. For example, enter **2008 and 2009** to find documents containing both 2008 and 2009. **Caution:** If you are searching for an exact number that is part of an alphanumeric text string, then the number will not be found. For example, if you search for **001** and the actual text is **ABC001**, then the value will not be found.
Formatted Number	Searches for numeric values that use special characters. For example, to search for all Social Security Numbers greater than 800-00-0000, enter **> 800-00-0000** in the **Search String** field. You can use this option with the following operators to limit your search: **=**, **>**, **<**, **=>**, and **<=**. You can use the **and**, **or**, and **to** operators to search for a range of values. For example, enter **800-00-000 to 900-00-0000** to find documents containing values within this range. **Note:** When you search for formatted numbers greater or less than the entered search string, formatted numbers followed by periods are not included in the search results. For example, if the formatted number is the last word in a sentence, then it will be omitted as a result.

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

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

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

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

   - If you search using only the **Find Previous** button, the pages that follow the current page are omitted from the search.

- If you search using only the **Find Next** button, the pages that precede the current page are omitted from the search.

8. Select **Column Search** to search within the specified columns. Use any of the following options:

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

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

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

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

Annotations Toolbar

The Annotations toolbar provides buttons for adding annotations or redactions to a document. You can show or hide the Annotations toolbar; by default it may be hidden.

For more information, see Creating an Annotation on page 314.

Note: If you are viewing a document that is locked by Records Management, the options on the Annotations Toolbar are selectable, but do not perform any tasks.

You can view, modify, or delete annotations the same way you do notes.

Button	Description
	Toggle Redaction lets you draw black or white rectangles over a portion of the document. The color of the redaction is determined by the adjacent drop-down list. You remain in redaction creation mode until you click the **Toggle Redaction** button again. This option is available for image documents only. You must have sufficient privileges to modify the document.
	Save Redactions saves any redactions that you have added to the document but not yet saved. You can save redactions only if the following requirements are met: • You have sufficient privileges to modify the current document. • The document is configured to allow redactions. • The document has an image or text report format.
	Toggle Annotation enables you to add one or more annotations to the document by selecting the annotation(s) from the adjacent drop-down list of available annotation types. You remain in annotation addition mode until you click the **Toggle Annotation** button again.

Note: Not all File Formats allow annotations. See your system administrator if the **Toolbars | Annotations** right-click option is not available.

Column/Row Locking Toolbar

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

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

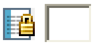
Any locks you specify will be applied to the current document for as long as it remains open. They will be removed as soon as you close it or open another document in the same viewer. If you return to the same document later, even in the current session, the columns or rows will be unlocked.

Using the Column/Row Locking Toolbar

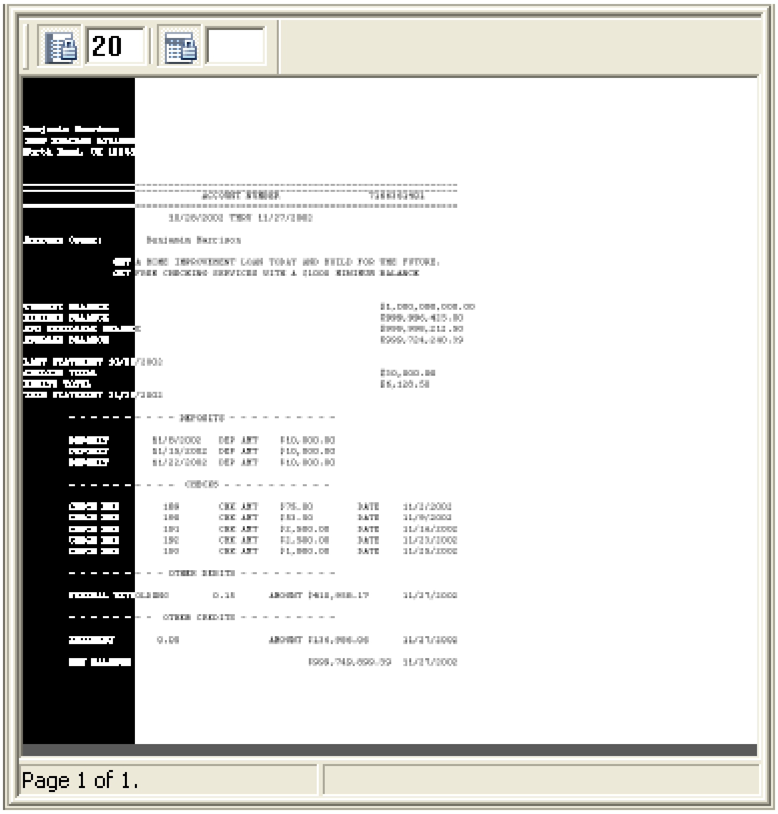
This toolbar is available for text report formatted documents. The Column/Row Locking toolbar allows you to lock the position of the specified number of columns and/or rows of text.

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

Locking Columns

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

   The locked columns are displayed in the shaded region.

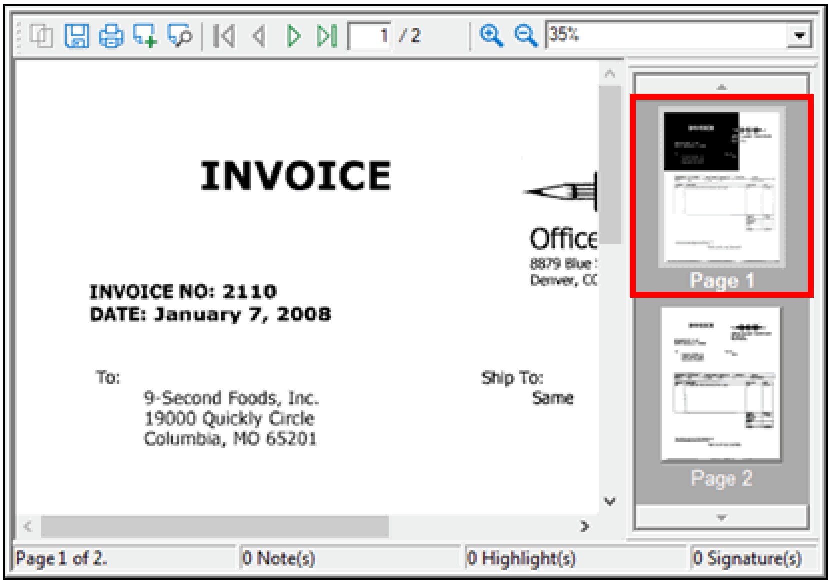


Locking Rows

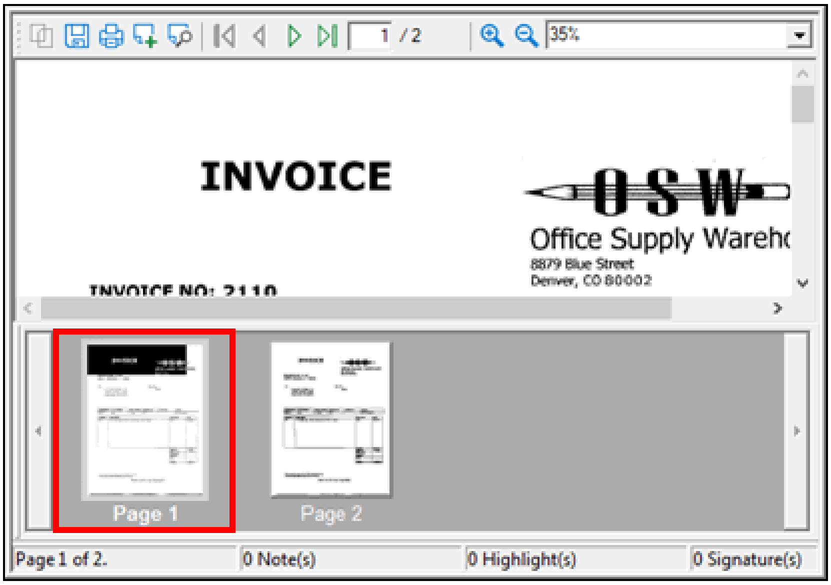
1. Enter the number of rows (from the top of the document) to lock in the row data entry field.
2. Press **Row Lock**. The locked rows are displayed in the shaded region.
3. Use the standard scroll arrows in the document viewer to move through the document, while maintaining the stationary lock area.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

Pages Toolbar - View Document Thumbnails

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



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



Show or Hide Thumbnails

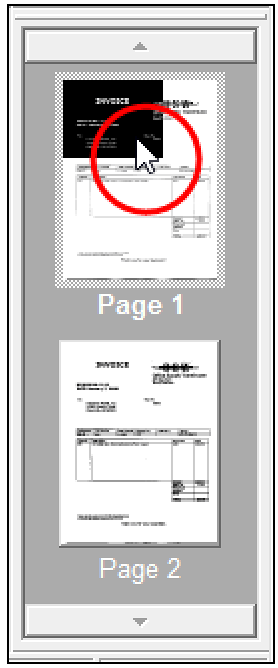
Thumbnails can be displayed or hidden by default. To show or hide thumbnails, right-click anywhere in the Document Viewer and select **Toolbars | Pages**. This toggles the thumbnails on or off.

Navigating the Document Using Thumbnails

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

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

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



Zooming Thumbnails

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

Reordering Pages in a Document Using Thumbnails

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

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

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

Adding Pages to a Document Using Thumbnails

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

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

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

To add pages to an image document:

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

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

Deleting Pages from a Document Using Thumbnails

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

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

Showing or Hiding Toolbars

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

1. Right-click on the header or the footer of the Document Viewer or the **Pages** toolbar.
2. Select **Toolbars** to display the toolbars that are available for the current document.
   - Viewer Control
   - Text Search
   - Column/Row Locking
   - Pages
   - Annotations
   - Notes List
   - Notes

3. Select an option to toggle the toolbar to **Show** (checked) or **Hide** (not checked).

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

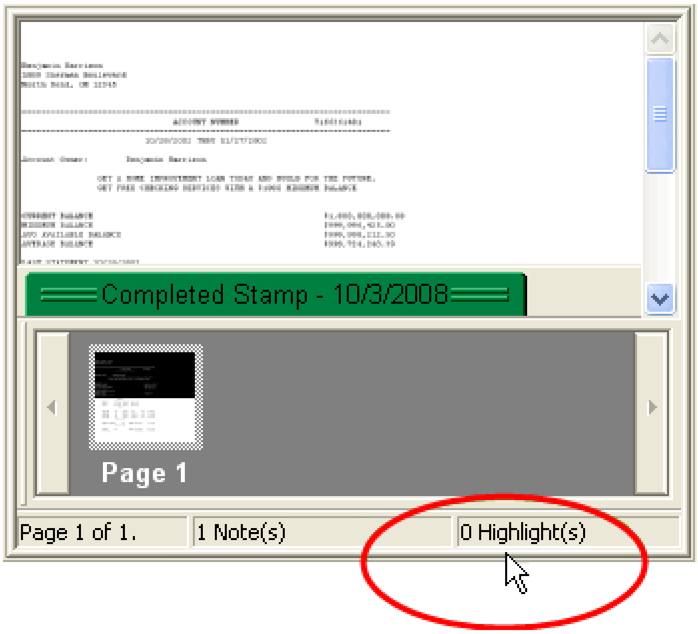
Auto-Hide Toolbars

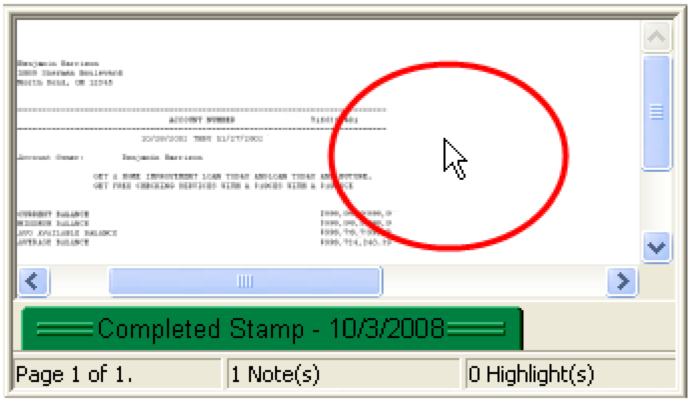
Auto-Hide provides the ability to hide toolbars until you position your pointer over their display area.

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

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

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





HTML Web Client Toolbars

See the following topics for information specific to the toolbars available in the HTML Web Client.

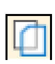
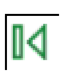
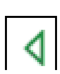
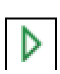
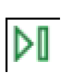
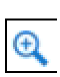
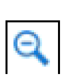
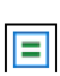
- HTML Web Client Viewer Control Toolbar on page 127
- HTML Web Client Internal Text Search Toolbar on page 129
- HTML Web Client Annotations Toolbar on page 131

- HTML Web Client Pages Toolbar on page 131
- HTML Web Client PDF and OLE Document Viewer Toolbar on page 135

HTML Web Client Viewer Control Toolbar

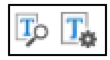
The HTML Web Client Viewer Control toolbar allows you to view the document more efficiently. Use the buttons to navigate within the document, resize and reorient the page, and print.

Note: A different toolbar is displayed when you are viewing PDF or OLE documents. See HTML Web Client PDF and OLE Document Viewer Toolbar on page 135 for information about the toolbar that is displayed when you view PDF or OLE documents.

Button	Description
	**Print** displays the **Print** dialog box, if you have user rights to print the document.
	**Overlay** applies an overlay to the document, if an overlay is present.
	**First Page** displays the first page of the document.
	**Previous Page** displays the preceding page of a multi-page document.
	**Next Page** displays the following page of a multi-page document.
	**Last Page** displays the last page of the document.
	**Zoom In** magnifies the view of a document, reducing the portion that is visible. Every zoom increases magnification by one third.
	**Zoom Out** reduces the magnification of a document, increasing the portion that is visible. Every zoom reduces magnification by one quarter.
	**Actual Size** displays the document in its actual size (as it is stored in OnBase). Clicking this button sets the magnification to 100%. **Note:** This zoom level differs from True Size, which takes the monitor's and image's DPI into account when displaying the image.

Button	Description
	Fit Width resizes the document page so that its width is the same as the width of the document display area.
	Fit Height resizes the document page so that its height is the same as the height of the document display area.
	Fit in Window resizes the document page so that it completely fits the document display area.
	Rotate Counterclockwise rotates the document 90 degrees counterclockwise.
	Rotate Clockwise rotates the document 90 degrees clockwise.
	Show Alternate Rendition is available only for documents that are allowed to have multiple renditions. This button allows you to view a different rendition of a document when the document has multiple renditions. To view a list of the available renditions, click this button. Select the rendition you want to view from this list.
	Text Search allows you to search for specific text strings within the document. For more information, see HTML Web Client Internal Text Search Toolbar on page 129.
	Generate Report allows you to generate a system report of internal text search results. For more information, see HTML Web Client Internal Text Search Toolbar on page 129.
	Toggle Annotation enables you to add one or more annotations to the document by selecting the annotation(s) from the adjacent drop-down list of available annotation types. You remain in annotation addition mode until you click the **Toggle Annotation** button again. For more information, see HTML Web Client Annotations Toolbar on page 131.
	Scale to Gray softens the contrast of text and image documents at zoom levels of less than 100%. This feature is most noticeable on black-and-white images, making it helpful for reading scanned documents containing text that is too dark or too light.
	Previous Document displays the previous document in a Document Results list
	Next Document displays the next document in a Document Results list.
	Options enables you to set viewer options.

HTML Web Client Internal Text Search Toolbar



From an open text-based document in the HTML Web Client, use the functions in the Internal Text Search toolbar to search for specific text strings within the document.

Note: You cannot execute an internal text search on a text document that has an overlay applied to it. Remove the overlay in order to execute the internal text search.

- You can limit the text string search to one or more consecutive columns (character positions).
- If the document is a COLD-processed document with one or more column indexes defined, then you can limit the search to the block of text defined by a column index. This is recommended for large documents to improve performance time when searching.

See the following topics for information about the available functionality for performing internal text searches in the HTML Web Client:

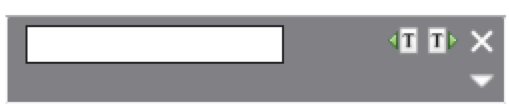
- Performing an Internal Text Search in the HTML Web Client on page 129
- Generating an Internal Text Search Report in the HTML Web Client on page 130

Performing an Internal Text Search in the HTML Web Client

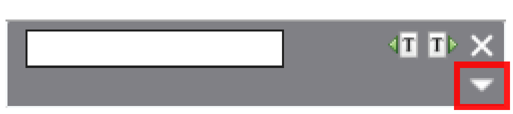
To perform an Internal Text Search in the HTML Web Client:

1. Click the **Text Search** button.

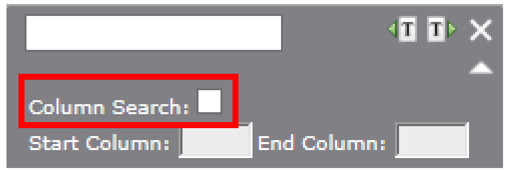
The Text Search box is displayed.



2. Click in the text entry field and type the characters to search for. As you type, results that match the search string are highlighted on the document.
3. Click the **Find Next** button or press **Enter** to find subsequent occurrences of the text. Occurrences of the specified search string are highlighted on the document.
4. To limit the search between specific columns, click the **Expand** button:



5. Select **Column Search**.

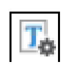


6. Specify values for the **Start Column** and **End Column**.
7. Click the **Find Next** button or press **Enter**. Occurrences of the specified search string are highlighted on the document.

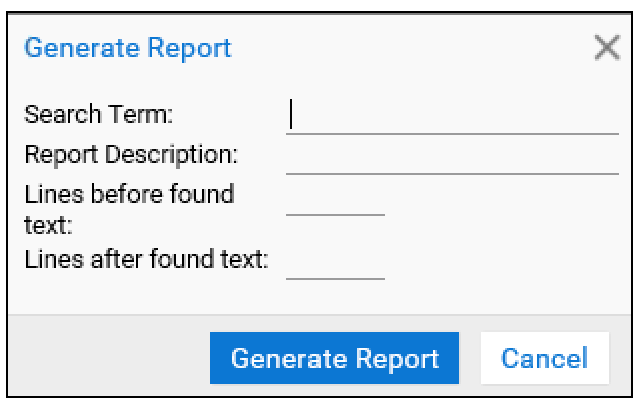
Generating an Internal Text Search Report in the HTML Web Client

You can generate a system report of internal text search results. This system report is stored as a document under the **SYS Search Reports** Document Type. To generate an internal text search report in the HTML Web Client, perform the following steps.

1. Click the **Generate Report** button:

   The **Generate Report** window is displayed.

2. Enter a search term in the **Search Term** field. This is the search term that will be searched on the document.
3. Enter a name for the report in the **Report Description** field. The text entered in this field will be used as the **Description** keyword value on the report.
4. If applicable, enter the number of lines of text to show above and below the found text in the **Lines before found text** and the **Lines after found text** fields.
5. Click the **Generate Report** button. The search report is created and stored as a document under the **SYS Search Reports** document type.

HTML Web Client Annotations Toolbar

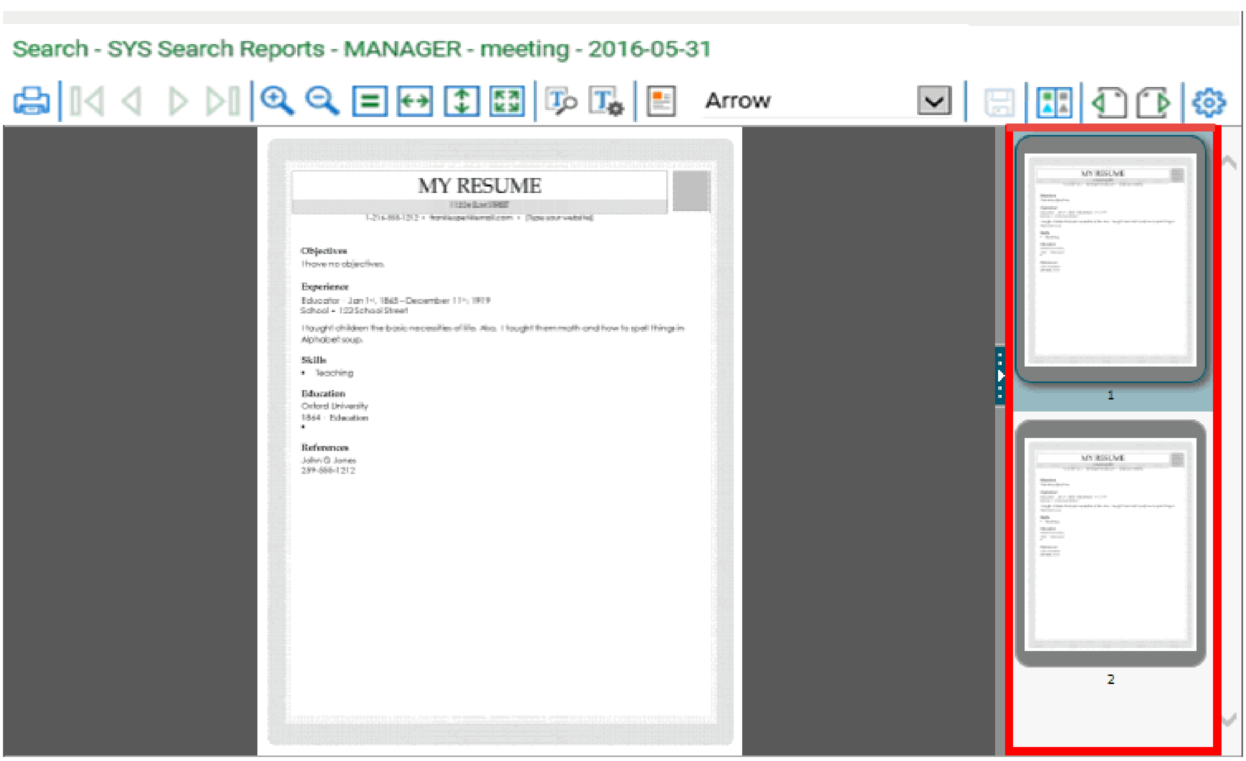
The Annotations toolbar allows you to draw annotations or redactions on a document.

Note: If you are viewing a document that is locked by Records Management, the Annotations Toolbar is also locked and cannot be used.

For information on creating annotations in the HTML Web Client, see Creating Annotations in the HTML Document Viewer on page 316.

HTML Web Client Pages Toolbar

Document Thumbnails are miniature representations of the document pages, which provide a method of document navigation. Document Thumbnails display in the Pages toolbar window in the Document Viewer.



You can easily navigate between the pages of a document by selecting a page in the pages toolbar.

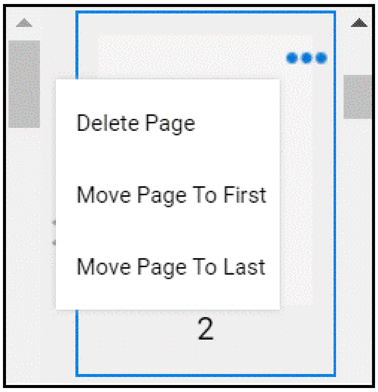
Reordering Pages in a Document Using Thumbnails

You can reorder pages in a multi-page image document using thumbnails in the **Pages** toolbar in the Document Viewer. Only the **Modify** privilege is required to reorder pages in a non-revisable document. The **Modify** and **Create Revisions** privileges are required to reorder a page in a revisable document.

Note: You cannot reorder pages if a document is read-only.

To reorder a page in a multi-page image document:

1. Open the document you want to reorder. See the Viewing Documents on page 59 section for more information on viewing and opening documents.
2. Locate the **Pages** toolbar. By default, the **Pages** toolbar is displayed along the right edge of the Document Viewer in a vertical column.
3. Perform one of the following actions to reorder the document:
   - Click on the thumbnail of the page you want to move, then drag the thumbnail to its new position and release it. When you release the thumbnail, the **Pages** toolbar is updated to reflect the new sequence.
   - Hover the mouse pointer on the thumbnail of the page you want to reorder and click the ellipsis icon on the top-right corner of the thumbnail. Then select **Move Page To First** or **Move Page To Last** to move a page to the first or to the last position within a document.



Note: The **Move Page To First** option is disabled when a page is in the first position in the existing sequence. The **Move Page To Last** option is disabled when a page is in the last position in the existing sequence.

Deleting Pages Using Thumbnails in the HTML Web Client

You can delete pages from revisable and non-revisable multi-page image documents in the HTML Web Client. Since deletion is a part of document modification, you need the following user privileges that relate to modifying documents.

User Privilege	Description
Modify	To delete pages from a document. **Note:** If **Document modify right does not imply right to delete document pages** is selected under the **Global Client Settings**, users also need the **Delete** privilege with the **Modify** privilege to be able to delete pages from a document.
Create Revisions	To save a modified document as a revision, if the Document Type of the document is configured as revisable.
Create	To save a modified document as a new document, if the Document Type of the document is configured as revisable.

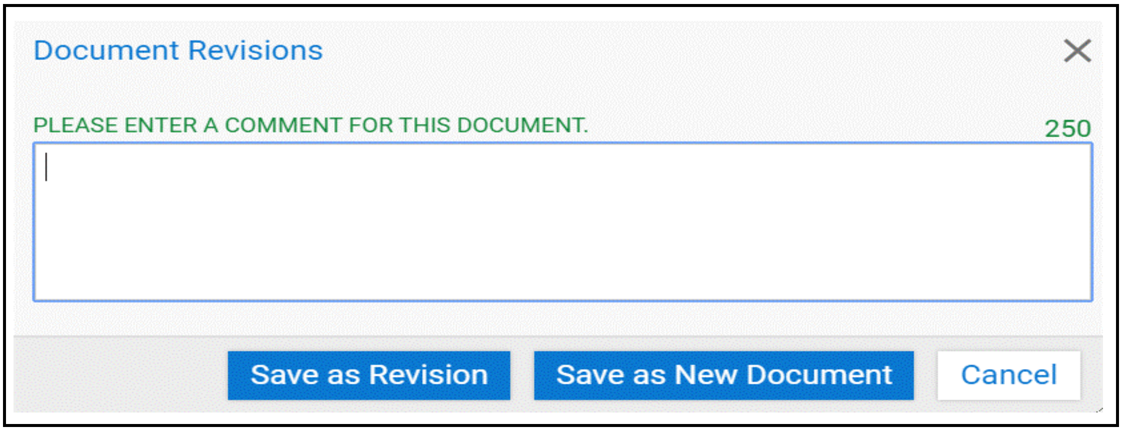
Tip: For complete details on revisions and renditions, see the **EDM Services** documentation. For details on configuring user privileges and Document Types, see the **System Administration** documentation.

To delete a page in a multi-page image document:

1. Hover the mouse pointer on the thumbnail of the page you want to delete and click the ellipsis icon on the top-right corner of the thumbnail.
2. Select **Delete Page**. You are prompted to confirm this action.

Note: The **Delete Page** option is disabled if a document is read-only.

3. Click **Yes**. If the document is not revisable, the page is deleted. If the document is revisable, the **Document Revisions** dialog box is displayed.



4. Enter a comment and click one of the following buttons.

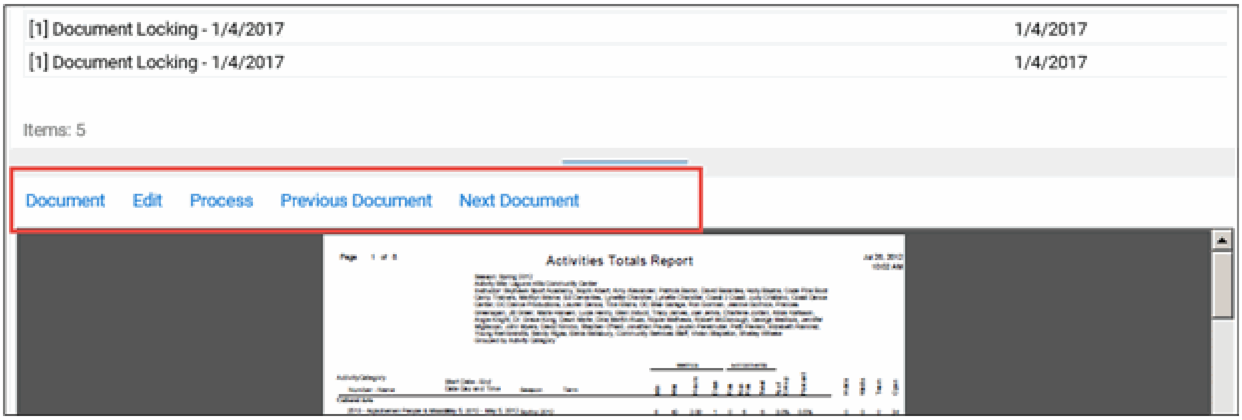
Note: The comment field accommodates no more than 250 characters. Depending how revisions are configured for your system, the comment field may be disabled.

Button	Description
Save as Revision	Saves the modified document as a revision. If you save the document as a revision, the new revision of the document omits the deleted page. Any text you enter in the comment field is saved as a comment for the revision.
Save as New Document	Saves the modified document as a new document. You are given the option to select a Document Type Group and a Document Type, and to specify a Document Date and Keyword Values, if available. If you save the document as a new document, the new document omits the deleted page, but the original document remains unchanged. **Note:** The **Create From Pages** option is disabled because you are deleting pages from the original document and saving it as a new document.
Cancel	Cancels the revision and does not save the changes to the document.

HTML Web Client PDF and OLE Document Viewer Toolbar

When you view PDF or OLE (Office) documents in the Web Client, a toolbar like the one shown below is displayed.

Note: When viewing OLE documents, this toolbar is only displayed when the Web Client is integrated with a Microsoft Office Online Server or Office for the web (Office 365). For more information, see your system administrator.



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

Note: PDF and OLE documents are read-only when viewed within the Web Client.

The following menus and options are available in the PDF and Office document viewer toolbar:

Button	Description
Document	The following items are available in the **Document** menu: • **Properties** Displays the document properties for the open document. • **History** Displays the document history for the open document. • **Cross-References** Displays all documents that are cross-referenced to the open document. • **Revisions / Renditions** Displays the revisions or renditions of the document, if the document type has revisions or renditions. • **Show Folder Locations** Displays the folders where this document resides. • **View in Native Application** Displays the document in its native application. **Note:** The **View in Native Application** option is only available when viewing OLE documents. This option is only available if the Web Client is integrated with Microsoft Office Online Server or Office for the web (Office 365). For more information, see your system administrator.
Edit	The following items are available in the **Edit** menu: • **Re-Index** Displays the Re-Index window for the open document. • **Keywords** Displays the Keywords window for the open document. • **Notes** Displays the Notes dialog for the open document.
Process	This menu contains options that apply to Workflow and WorkView. For descriptions of these menu items, refer to the **Workflow** and **WorkView** help files or module reference guides.
Previous Document	Click the **Previous Document** button to navigate to the next document in the list.
Next Document	Click the **Next Document** button to navigate to the next document in the list.

Note: If an Office Business Application (OBA) is installed, you may be prompted to edit the document in its native application.

Working with Documents

This chapter provides a general overview of working with documents.

When working with documents in OnBase, it is important to understand that documents may behave slightly differently, depending upon their file format. A file format identifies the type of digital file.

The two most common file formats are image documents and text documents. Other file formats could include XML, video formats, or OLE documents such as those created with Microsoft Office applications. See your system administrator for specific questions regarding your system's file types and their default behavior.

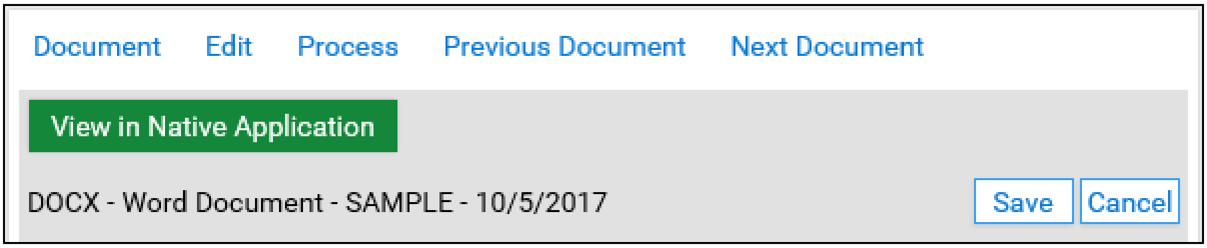
Image Documents

Image documents, such as checks, x-rays, or pictures of real estate can come from several native file formats, such as .tiff, .jpg, or .bmp. Once they are imported into the system, they are stored in their native file format. If the file does not have a native file format when imported, it will be stored as the chosen **File Type**.

OLE Documents

OLE is short for Object Linking and Embedding, a standard that allows documents created with one application to be linked or embedded in another application. OLE documents, such as Microsoft Word documents, retain their original format and links to the applications that created them.

When you open an OLE document in OnBase, the document is displayed in a viewer based on the document's source application. If the **View in Native Application** button is available, you can view documents using the Office Business Application. Note that if you are viewing an older document (.doc instead of .docx), the button displays on a yellow background indicating that the document is read-only.

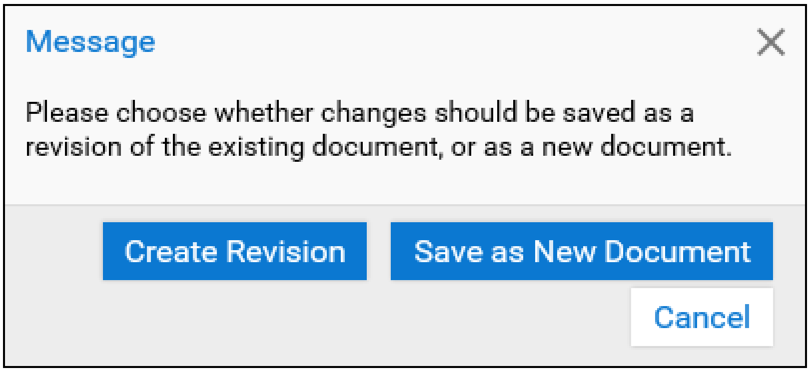


The document's right-click options are specific to the source application. OnBase options can be accessed by right-clicking the document in a Document Search Results list.

For open OLE documents, you can access OnBase options from the **Document** and **Edit** menus.

To modify, revise, re-index, add notes to, and find cross-references for Office documents opened from the OnBase Web Client, use the Office Business Application for the version of Microsoft Office you have installed on your system.

When you have modified a revisable OLE document, upon saving in the source application, a dialog box is displayed asking whether you want to save the changes as a revision of the existing document, or create a new document.



Select the desired option, or click **Cancel** to exit the dialog box.

Text Documents

Text-based documents have special features available for selecting or searching text. Examples of text-based documents in the system are ASCII files, PCL documents, text renditions of image documents, text-based documents such as checking statements that have been imported into the system, and system reports or verification reports created during processing.

All text documents in the system are read-only, thus the contents of the text documents themselves can never be modified or deleted. The associated attributes however, such as Keyword Values, notes, file types or Document Types, can be modified by a user with the appropriate rights. Users with Delete document rights can delete the whole text document, not delete its contents.

Text documents have specific buttons, which are different from the buttons and options available to image documents.

Audio and Video Files

The Web Client allows users to natively view audio and video file types within the document viewer window. You can use standard media controls to start, stop, as well as fast-forward and rewind playback. Some audio and video files require additional plug-ins to be installed on the user's workstation, such as QuickTime. The QuickTime plug-in in particular helps to buffer the media files appropriately. Some file types may also require the configuration of a custom file format.

Note: AVI video files can only be played in Internet Explorer with the Windows Media Player Plug-in.

Document Viewer Shortcuts

The following keyboard shortcuts can be used when viewing documents:

Navigating Documents

The following keyboard functions allow you to navigate a document.

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

Zooming In and Out

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

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

Searching for Internal Text

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

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

Viewing Previous or Next Documents

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

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

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

HTML Web Client Document Viewer Shortcuts

The following keyboard shortcuts are available while viewing documents in the HTML Web Client, in addition to the list of shortcuts in the previous sections.

Note: These keyboard shortcuts are not available when viewing embedded OLE documents.

Shortcut	Function
Page Up	Quickly scrolls up the current page. At the beginning of a page in a multi-page document, scrolls to the previous page.
Page Down	Quickly scrolls down the current page. At the end of a page in a multi-page document, scrolls to the next page.
Ctrl + K	View or modify keywords for the selected document.
Ctrl + H	View the document history for the selected document.
Ctrl + N	Display the **Add Note** dialog for the current document. **Note:** This shortcut is not supported in Chrome.
Ctrl + Shift + N	Display the **View Notes** dialog for the current document. **Note:** This shortcut is not supported in Chrome.
Ctrl + P	Displays the **Print** dialog box.
Ctrl + W	Initiate a cross-reference from the current document. **Note:** This shortcut is not supported in Chrome or Firefox.

Deleting Documents

You can delete documents from OnBase if you have the appropriate user privileges. Deleted documents are sent to the Trash Can.

Note: You cannot delete a document if it is locked by another user.

There are several ways to delete documents in the Web Client:

- To delete an open document in the Document Viewer, right-click the document and select **Delete Document**.
- To delete documents from a results list or folder, select one or more documents, right-click the documents, and select **Delete**.

Tip: Once a document has been deleted, it may be possible to restore it. See Restoring Deleted Documents on page 142.

Restoring Deleted Documents

Users can view and restore deleted documents by using the Trash Can. The Trash Can displays documents deleted by the current user.

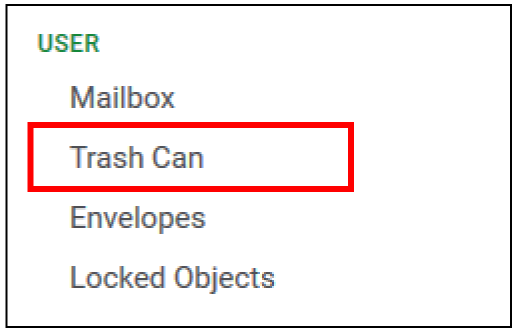
Note the following:

- Only the user who deleted the documents can restore them using the Trash Can.
- A system administrator can restore any deleted documents using Document Maintenance in the OnBase Client.
- Depending on your solution, the documents in the Trash Can might be permanently purged on a regular basis. See your system administrator for more information on how long deleted documents remain in OnBase.
- The Trash Can is only available for users with privileges to delete documents.

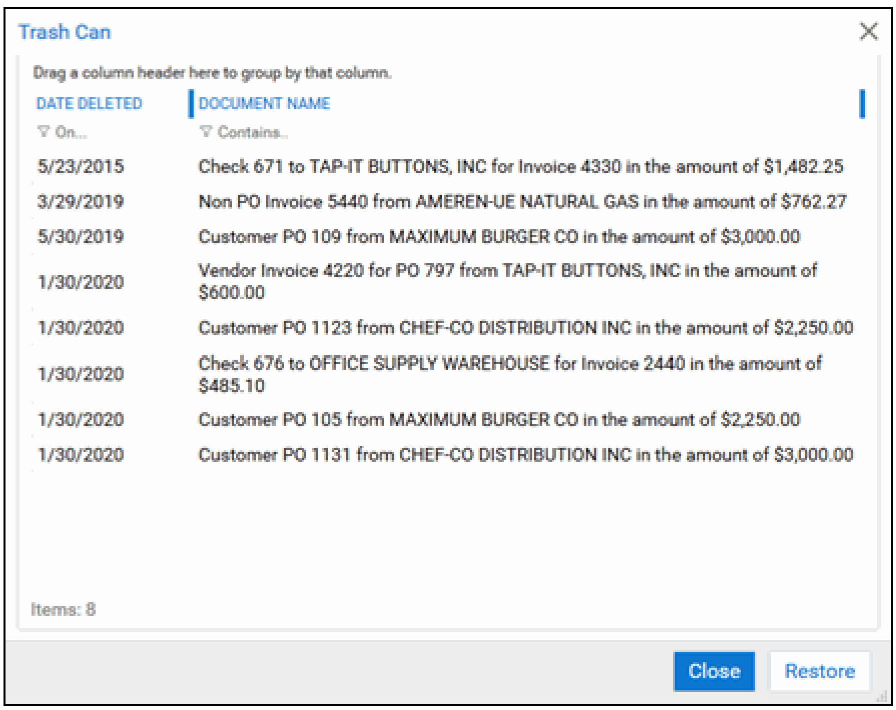
To restore deleted documents:

1. Do one of the following:
    - Click the **Trash Can** icon in the title bar.

- Select **Trash Can** from the **User** section of the Main Menu.



The **Trash Can** dialog box is displayed.



2. If needed, use the column headers to sort, group, and filter the documents in the results list. You can perform the following actions:
   - To sort the results by a specific column in ascending order, click the column header. Click the column header again to sort the items in descending order.
   - To group the results by a specific column, drag the column header to the space above the column headers.
   - To filter the results, click the gray filter area under a column header and enter the search criteria for the filter.

Tip: For more information on working with items in a results list, see Document Search Results List on page 94.

3. Select one or more documents in the results list that you want to restore. To help identify a document to restore, you can perform the following actions:
   - To view a document, double-click it in the results list. The document opens in a separate window.
   - To view document attributes, right-click a document in the results list and select one of the following:

Option	Description
Keywords	Opens the **Add/Modify Keywords** dialog box and allows you to view the document's Keyword Values.
History	Opens the **Document History** dialog box and allows you to view the document history.
Properties	Opens the **Document Information** dialog box and allows you to view the document properties.

4. Click **Restore**. The deleted documents are removed from the Trash Can and are now available for use again.

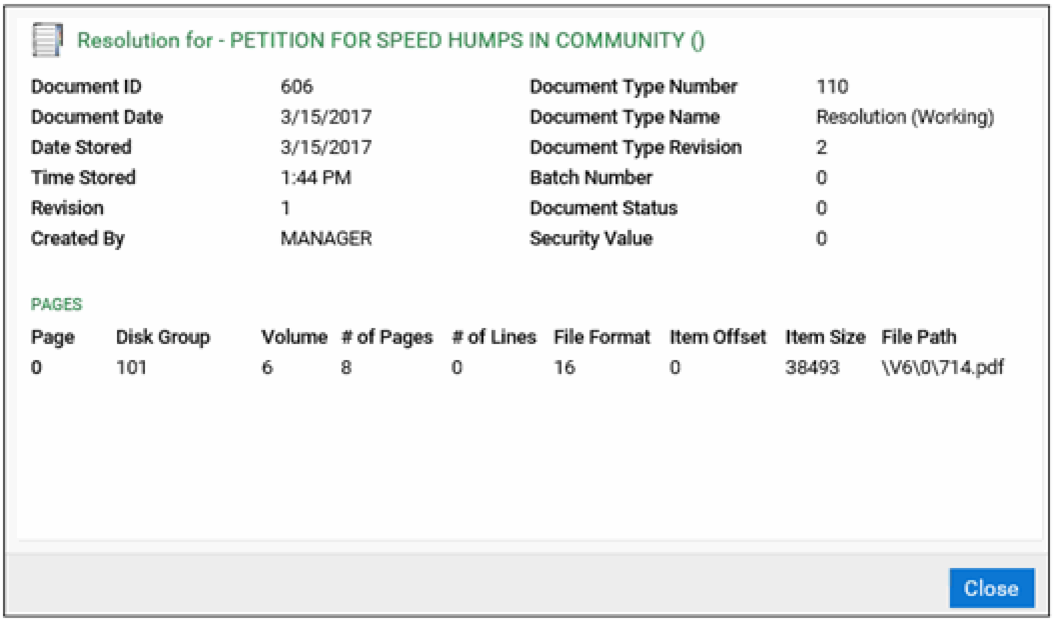
Accessing Document Properties

View the **Document Properties** by accessing the **Document Information** dialog box, which contains a variety of information regarding the document.

To view a document's properties:

- From a Document Search Results list, select the document, right-click, and select **Properties**.
- From an open text or image document, right-click and select **Properties**.

- From an open OLE document, select **Document | Properties**.
- From an open PDF document, select **Document | Properties** or click the **Document Properties** button from the viewer control toolbar.



Note: Your User Group must have the Document Properties privilege in order to access **Document Properties**. For additional information, see your system administrator.

Document Properties

You can display the **Properties** of all documents in the system, as long as you have the proper privileges.

Property	Description
Document Handle	The document number assigned to the document when it was brought into the system. This is the only place in the system where the internal document handle for a document is displayed. The document handle can be used to retrieve a specific document and to troubleshoot problems with the document.
Document Name	The Auto-Name string of the document.
Batch Number	The number of the batch in which the document was brought into the system. A batch number is displayed if the document was brought into the system through a process such as COLD.
Document Date	The date used by the system to refer to the document. This date is used during searches limited by date. The document date is assigned to a document during import. **Note:** If the **Import Document** layout has been open overnight, the system date and Document Date may reflect the previous day's date. If this has occurred, close and re-open the **Import Document** layout so that the correct Document Date is stored.
Archival Date	The date on which the document was imported into the system. If an invoice from December 28, 1996 was brought into the system on March 11, 1997, December 28, 1996 is the document date and March 11, 1997 is the date stored. This date is used for internal tracking. You cannot search for documents based on the date stored. This field also contains the time at which the document was imported into the system. You cannot search for documents based on the time stored.
Document Type Number	The internal number associated with documents of this Document Type.
Document Type Name	The name of the Document Type to which the document belongs.
Document Status	Displays the document's position in the system. If the document is retrievable, a status of **0** is displayed. If the document is in the system, but not yet available for retrieval, a status of **1** is displayed. If the document has been deleted, a status of **16** is displayed.

Property	Description
Document Type Revision	Displays which revision of the Document Type the document is using. Different Document Type revisions can have different configurations.
Revision	If the document is revisable, the **Revision** field displays the latest revision number of the document. For non-revisable documents, this field is always set to 1.
Created By	The name of the user who processed the document into the system.
Security Value	For internal use only.
Page	The internal page number for a document. Page numbers start at 0, and are indicative of the number of files used to display the document. Text documents typically have only one page, while image documents typically have several. Virtual E-Forms have no pages, so on a Virtual E-Form this field would display the tag **<Virtual E-Form>** instead of a page number.
Disk Group	The number associated with the Disk Group in which the document is stored.
Volume	The volume number in the Disk Group in which the file is stored.
# of Pages and # of Lines	The characteristics of the document within the file. These values are useful for text documents. Non-text documents display the number of pages as **1** and the number of lines as **0**.
File Format	The number associated with a configured file format. This number determines how a document is displayed and printed.
Item Offset and Item Size	Describes the physical storage of the document within the file. The **Item Offset** is the byte offset into the file for the starting point of this particular document. The **Item Size** is the number of bytes in the file that make up this document.
File Path	Lists a partial path to the document. The beginning of the path depends on the location configured for the document's Disk Group.

Note: Dates and times use the Windows regional settings for formatting.

Show Folder Locations

Use the **Show Folder Locations** option to view the folders where a document resides.

From an open document, right-click and select **Show Folder Locations**. From an open OLE document, select **Document | Show Folder Locations**. The Folders window displays the folders where the document statically or dynamically resides. If the document resides in only one folder, the folder is opened automatically.

Note: The **Show Folder Locations** option is only available for image, text, and OLE documents.

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.

Retrieving Cross-Referenced Documents

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

From Image or Text-Based Documents

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

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

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

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

From E-Forms or HTML Documents

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

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

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

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

From PDF or OLE Documents

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

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

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

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

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

Overlays

The following example shows a document displayed with an overlay.

PURCHASE ORDER

9second FOODS
19000 Quickly Circle
Columbia, MO 65201
p. 573.555.9000
f. 573.555.9001

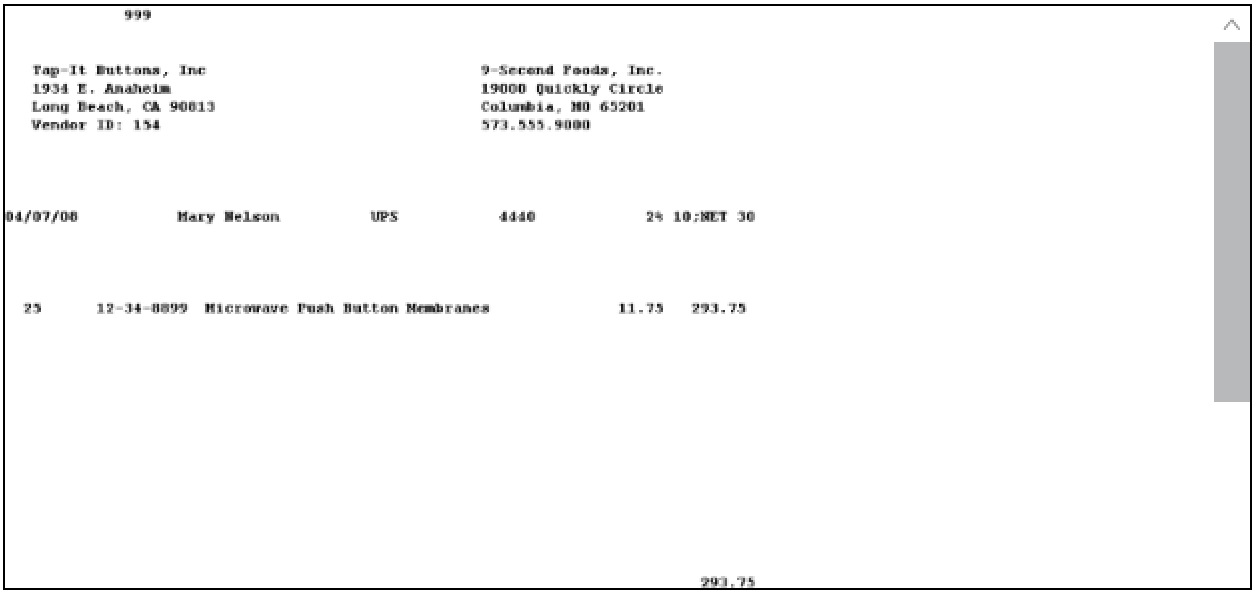
The following number must appear on all related correspondence, shipping papers, and invoices:
P.O. NUMBER 999

To:
Tap-It Buttons, Inc
1934 E. Anaheim
Long Beach, CA 90813
Vendor ID: 154

Ship To:
9-Second Foods, Inc.
19000 Quickly Circle
Columbia, MO 65201
573.555.9000

P.O. DATE	REQUISITIONER	SHIP VIA	F.O.B. POINT	TERMS
04/07/08	Mary Nelson	UPS	4440	2% 10;NET 30

The following example shows the same document displayed without an overlay.



999

Tap-It Buttons, Inc
1934 E. Anaheim
Long Beach, CA 90813
Vendor ID: 154

9-Second Foods, Inc.
19000 Quickly Circle
Columbia, MO 65201
573.555.9000

04/07/08 Mary Nelson UPS 4440 2% 10;NET 30

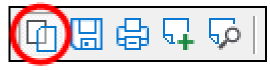
25 12-34-8899 Microwave Push Button Membranes 11.75 293.75

293.75

If a text document has been set up with a corresponding overlay, the **Overlay** button is available at the top of the viewing window. This indicates that you can apply the overlay to the document or remove the overlay.

Apply an Overlay to a Document

Open a text document that uses an overlay and select the **Overlay** button from the Client toolbar to apply its overlay.



Remove an Overlay from a Document

To remove the overlay from the window, click the **Overlay** button.

Renditions

Document Types may be configured to allow multiple renditions of a document. A rendition is a copy of an original document that is saved in a different file format. An example of a rendition is a searchable text document created from an image document.

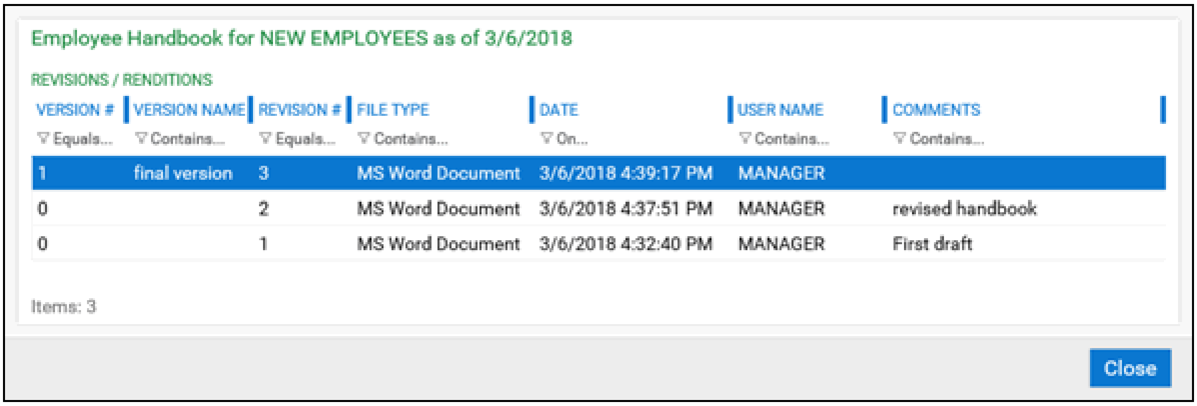
Viewing Renditions

To view a rendition in the OnBase Web Client,

1. Access rendition information by doing one of the following:
    - From a document selected in a Document Search Results list, right-click and select **Revisions/Renditions**.
    - From an open text or image document, right-click in the viewer and select **Revisions/ Renditions**.
    - From an open PDF or OLE document, such as a Word document, select **Document | Revisions/Renditions**.

- From an open text or image document in the HTML Viewer, select the **Revisions/ Renditions** icon.

The **Revisions/Renditions** dialog box is displayed.



Note: If the **Revisions / Renditions** option is unavailable, the Document Type may not allow multiple renditions.

2. From the **Revisions / Renditions** dialog box, double-click the rendition you want to view.

Note: When you print from an open document, the rendition that is currently displayed is printed.

Importing Renditions

For Document Types that allow renditions, you can import a document as a rendition of an existing document. This option is available if the existing document and the imported document have identical Document Types and Keyword Values, but different file formats. Depending on your system's configuration, the imported and existing document may be required to have the same Keyword Values for some or all Keyword Types. You cannot import a document as a rendition if the existing document already has a rendition with the same file format as the imported document.

When you import a document meeting the above criteria, the **Document Revisions** dialog box is displayed. Select the existing document for which you want to create a rendition and click **Save as Rendition**. To save the imported document as new document, click **Save as New Document**, or click **Cancel** to cancel the import process.

Note: Additional options may be available if the Document Type is revisable. For more information about revisions, see the **EDM Services** documentation.

Send To Options

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

Display Considerations

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

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

From an Open Document

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

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

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

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

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

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

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

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

From the Document Search Results List

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

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

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

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

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

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

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

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

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

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

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

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

Saving Documents to Files

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

You can save documents to files in the following ways:

- Text and image documents can be saved from either an open document in the Document Viewer or a Document Search Results list.
- OLE and PDF documents viewed in the OLE document viewer can be saved from a Document Search Results list.

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

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

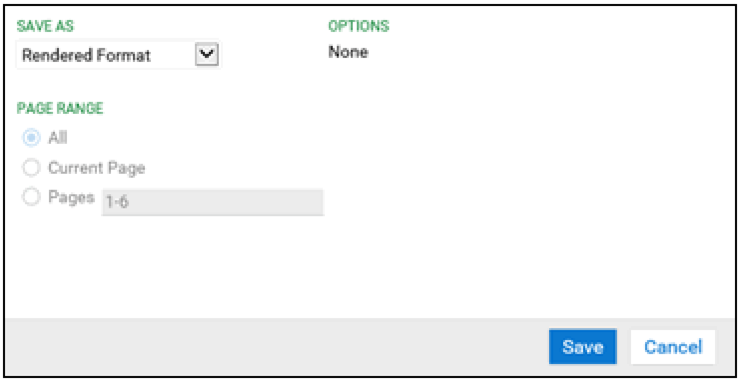
The following steps describe how to save one or more documents to a file:

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

      Saving multiple documents requires downloading the documents to a single .zip file. For information on saving multiple documents from the Document Search Results List, see Saving Multiple Documents to a Zip File on page 161.
    - From an open text or image document, right-click and select **Send To | File**, or click the **Save to File** toolbar button.

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

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



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

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

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

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

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

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

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

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

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

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

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

7. Click **OK**. The **Save As** dialog box is displayed.
8. Modify the file's name and location as needed. See File Naming Conventions on page 160 for more information.
9. Click **Save** to save the file. Certain characters will be substituted in the file name upon saving.

File Naming Conventions

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

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

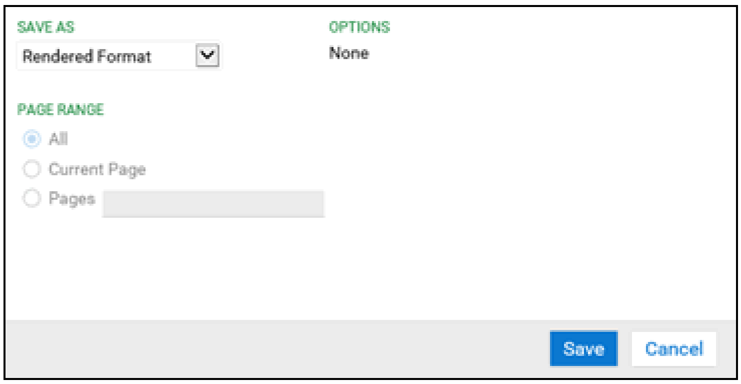
If the default **Save As** location already contains a file with a matching file name, OnBase automatically appends the new file's name with an underscore and an incremental number. For example, if **Checking Statement Acct#1020** already exists in the default **Save As** location, OnBase will name the new file **Checking Statement Acct#1020_1.tif**. See Character Substitutions on page 162 for more information.

Saving Multiple Documents to a Zip File

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

To save multiple documents to a .zip file:

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



3. Select a content type from the drop-down list to specify how the selected documents are saved within the .zip file. See Saving Documents to Files on page 156 for more information on saving documents to a specific content type.

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

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

Character Substitutions

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

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

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

Print or Copy Sections of a Document Using Rubber Band

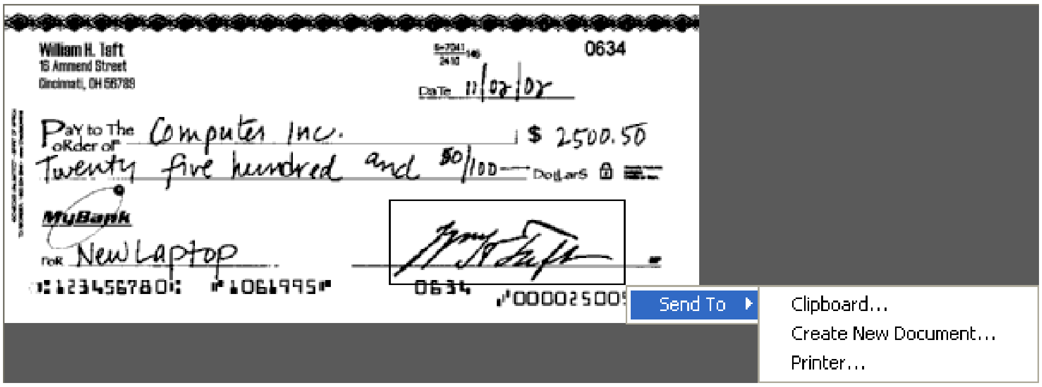
You can print or copy an area of a text or image document using the Rubber Band feature. Copied content can be pasted into another program or be used to create a new document in OnBase. To successfully print or copy selected areas of a text document with an overlay applied, the overlay must be removed.

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

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

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

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



4. Select one of the following options:

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

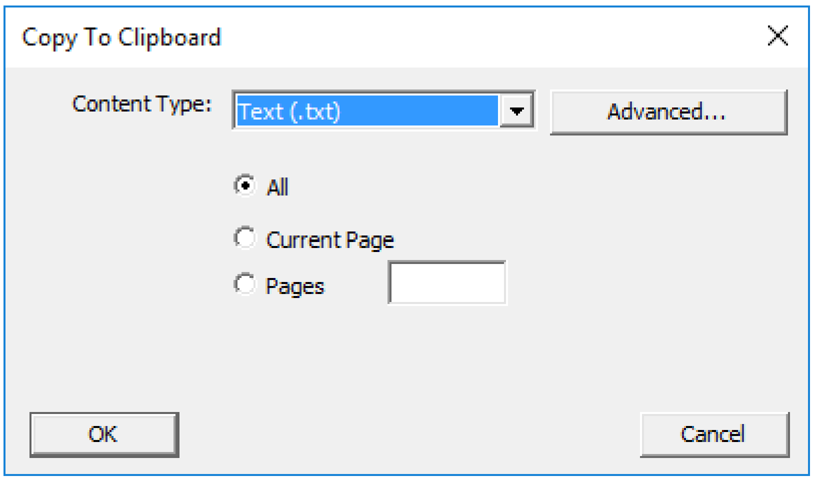
Send To | Clipboard - Copying Documents to the Clipboard

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

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

To copy a document to the clipboard:

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



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

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

3. Click **OK**.

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

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

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

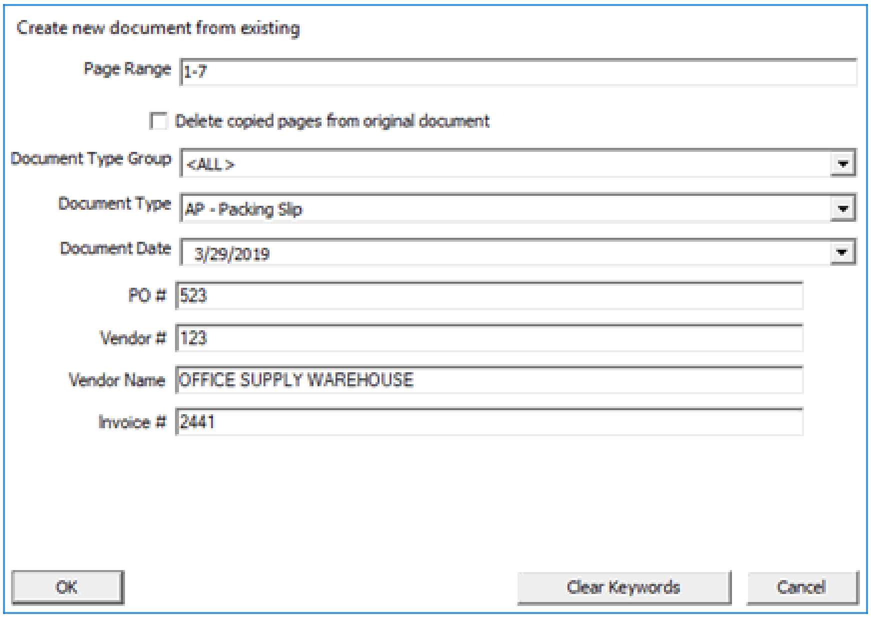
- If any Document Type in the **Search Results list** has **Copy to Clipboard/Save As** and **Create New** privileges, the **Create New Document** menu option is visible.
- If an individually selected document type in the **Search Results list** has **Copy to Clipboard/Save As** privileges, the **Create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

Create New Documents Using ActiveX

To create a new document using ActiveX controls:

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

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



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

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

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

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

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

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

---

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

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

---

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

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

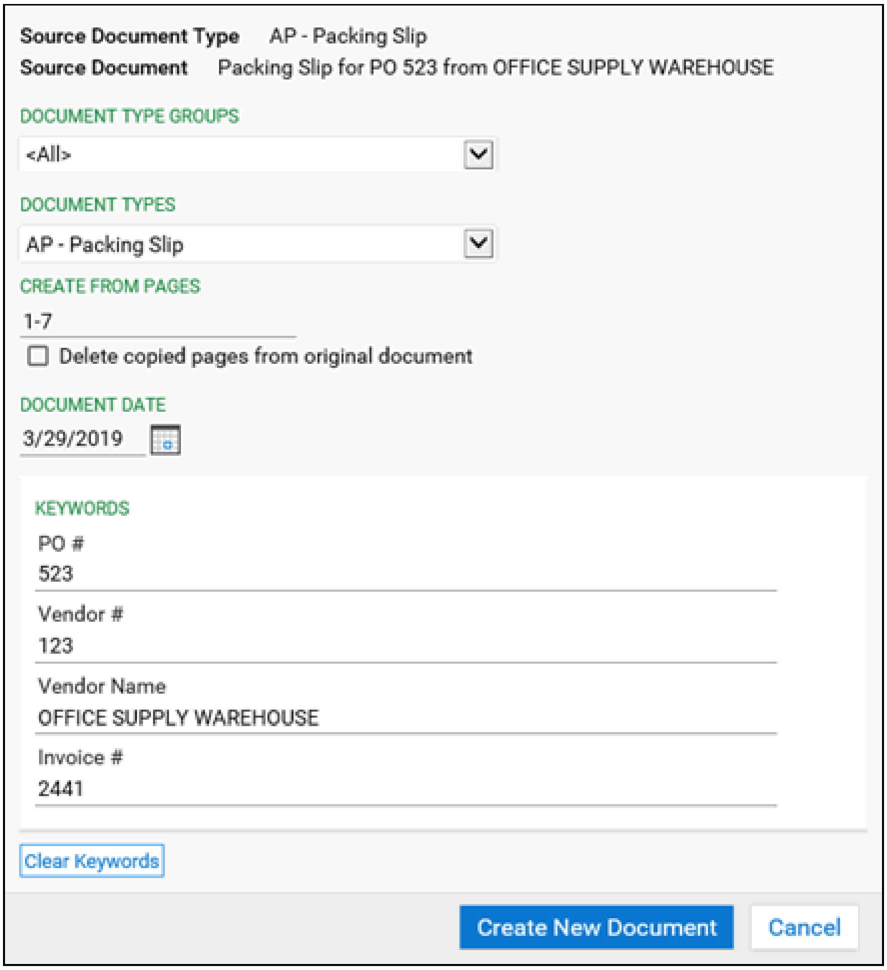
   If you chose to delete the copied pages, you are prompted to confirm the deletion. Click **Yes** to confirm, or click **No** to cancel the deletion and return to the **Create new document from existing** dialog box.

Create New Documents Using HTML

To create a new document from the HTML Web Client:

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

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



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

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

The page range option is available for multi-page image documents only. A specified page range is required when creating a new document. You can type complex ranges, such as **1-2,5,8-11**.

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

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

Note: The **Delete copied pages from original document** option is not available if the original document is a single page.

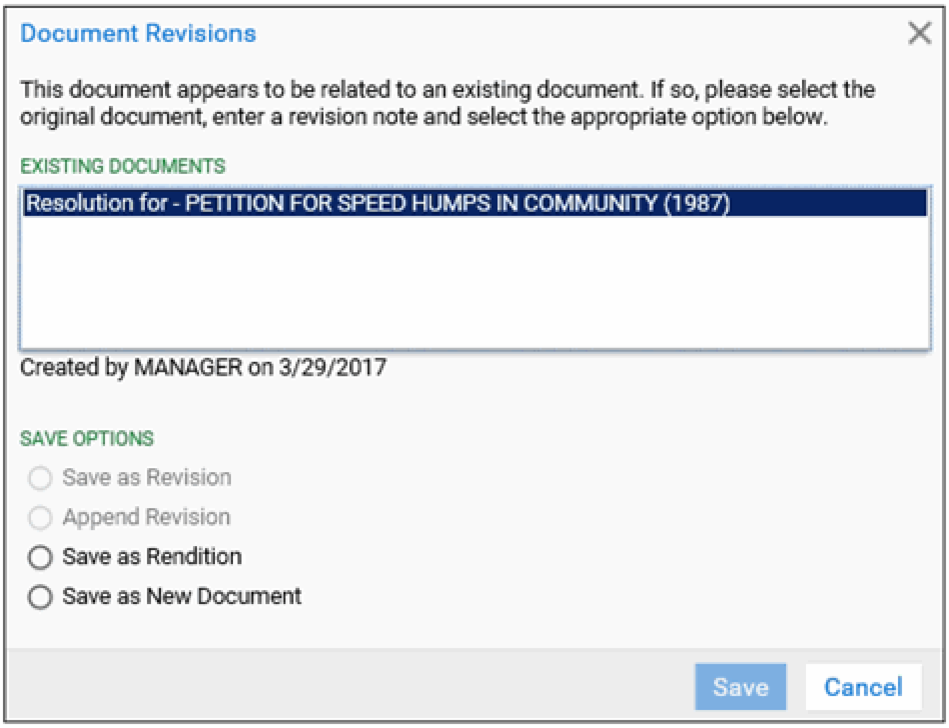
4. Index the new document by specifying the **Document Type Group**, **Document Type**, **Document Date**, and any Keyword Values.

   Depending on your user rights, the new document may not contain masked Keyword Values from the original document. See the **Encrypted Alpha Keywords** documentation for more information.
5. If the **Create as revision of original document** option is available, select the option to create the document as a revision to the original source document. When this option is enabled, the Document Type and Keywords are reset to the source document and cannot be modified. This option is available if all of the following are true:
   - The OnBase solution is licensed for EDM Services.
   - The source Document Type is revisable.
   - You have the proper privileges to create revisions.

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

6. Depending on your system's configuration and licensing, the **Add To Workflow** option may be available. Select it to add this new document to a Workflow life cycle. This option is only available when licensed for Workflow and the Document Type is part of an existing life cycle.
7. Click **Create New Document**. The following is displayed, depending on your selections:
   - The new document is displayed on the screen.
   - If you chose to delete the copied pages, you are prompted to confirm the deletion. Click **Yes** to confirm, or click **No** to cancel the deletion and return to the **Create new document** dialog box.

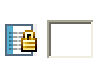
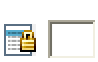
- If you selected the **Create as revision of original document** option, the **Document Revisions** dialog box is displayed.



Select the appropriate Save option, and then click **Save**. The document is displayed on the screen.

Column/Row Locking Toolbar

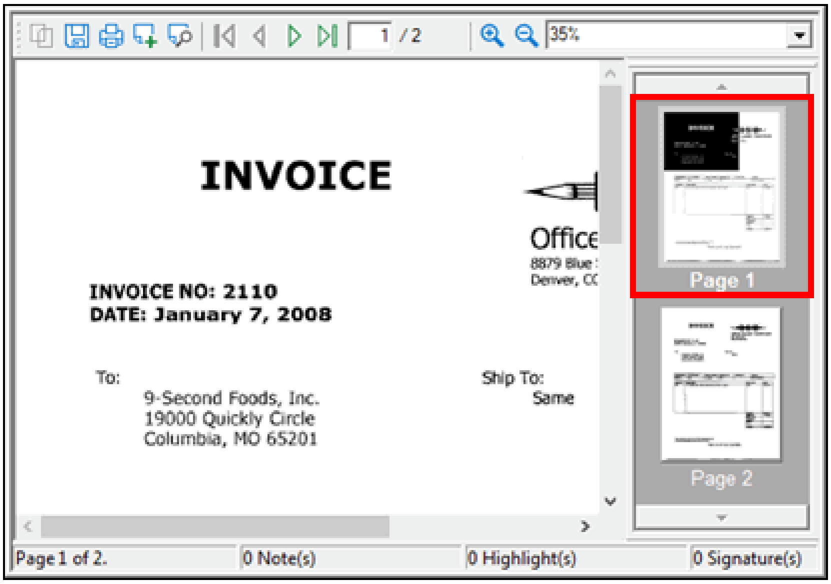
The **Column/Row Locking** toolbar is available for text documents when using the OnBase Viewer. Use this toolbar to lock columns of text into place at the left of the document, or to lock rows of text into place at the top of the document, keeping them static as you scroll through a page.

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

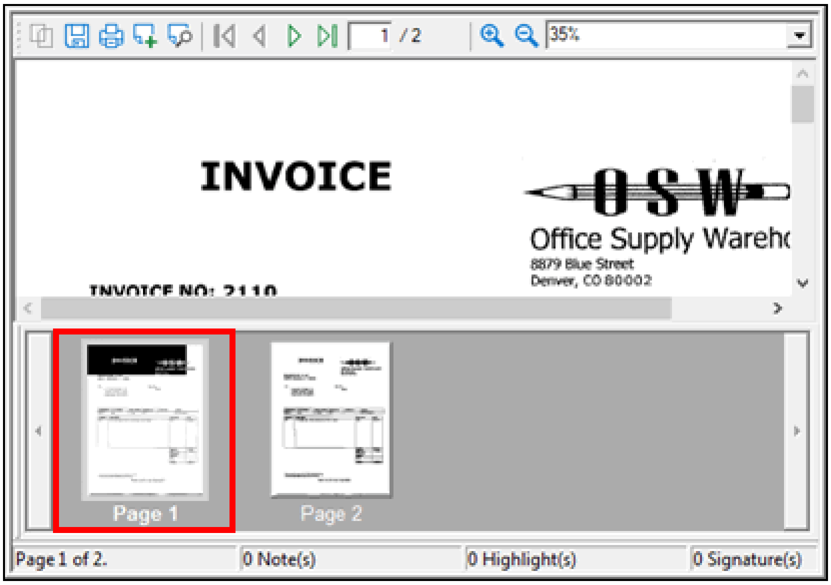
Any locks you specify will be applied to the current document for as long as it remains open. They will be removed as soon as you close it or open another document in the same viewer. If you return to the same document later, even in the current session, the columns or rows will be unlocked.

Pages Toolbar - View Document Thumbnails

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



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



Show or Hide Thumbnails

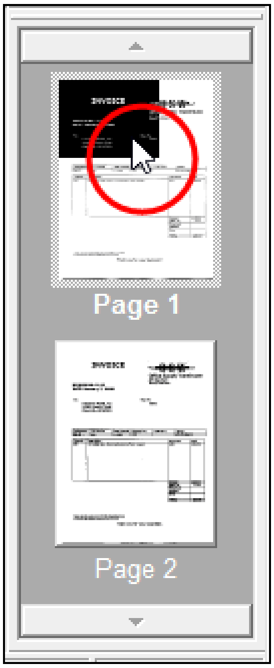
Thumbnails can be displayed or hidden by default. To show or hide thumbnails, right-click anywhere in the Document Viewer and select **Toolbars | Pages**. This toggles the thumbnails on or off.

Navigating the Document Using Thumbnails

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

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

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



Zooming Thumbnails

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

Reordering Pages in a Document Using Thumbnails

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

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

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

Adding Pages to a Document Using Thumbnails

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

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

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

To add pages to an image document:

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

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

Deleting Pages from a Document Using Thumbnails

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

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

Considerations for Adding Pages to a Document Using Thumbnails

You can add pages from one image document to another using thumbnails in the Web Client.

By default, the Web Client uses the same Document Viewer to display each document. To use thumbnails to add pages from one image document to another, you must open at least one of the documents in a new window.

Open in New Window

You can view multiple documents at the same time using the **Open in New Window** right-click option.

To open documents in a new window:

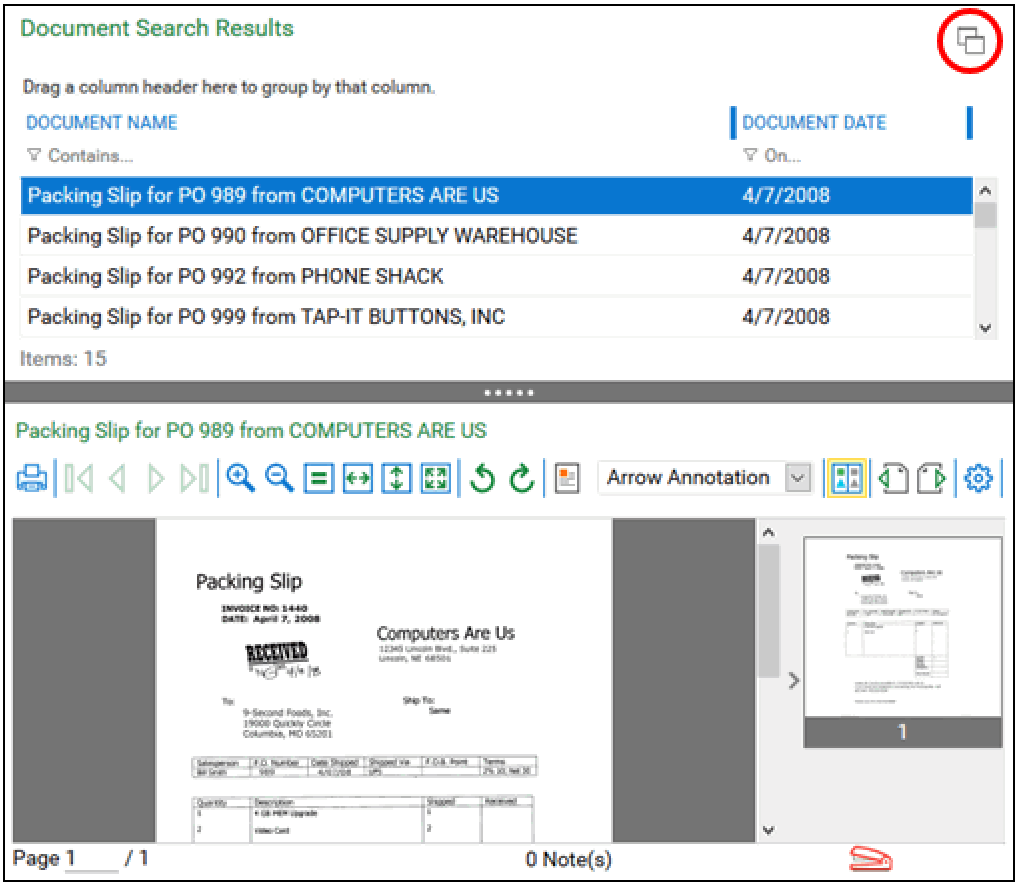
1. Select up to five documents from the Document Search Results list.
2. Right-click and select **Open in New Window** from the options menu. The selected documents are opened in separate windows.

Note: You cannot view documents retrieved from a text-based search in multiple windows; they must be viewed one at a time.

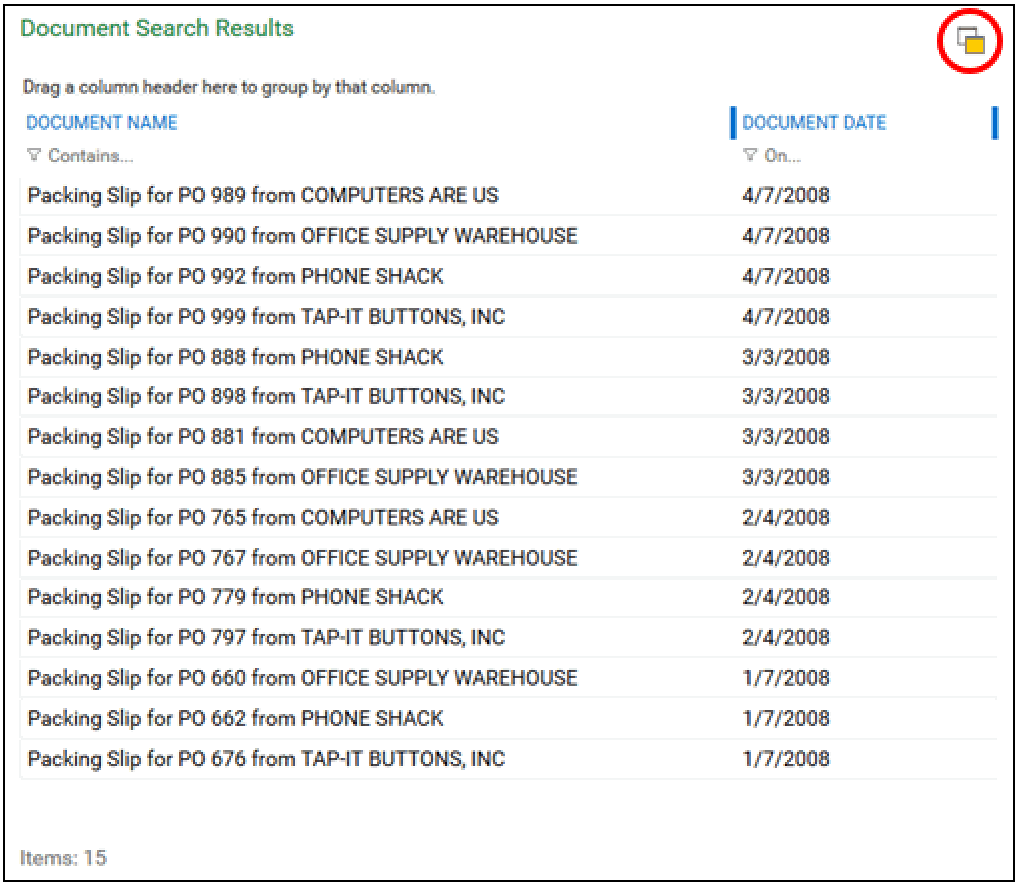
Open in New Window by Default

You can configure the Document Search Results list to always open documents in a new window, instead of opening in the Document Viewer below the list.

To always open documents in a new window, click the **Open in New Window** toggle button in the results list pane.



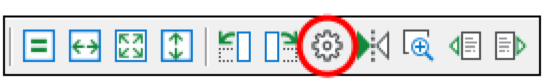
The Document Viewer is removed, and the button icon changes to indicate the setting is enabled. When you open a document from the list, it will be opened in a new window.



Click the **Open in New Window** button again to toggle back to opening documents in the Document Viewer. The button icon changes back to indicate the setting is disabled.

Options Button - OnBase Viewer Options

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



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

- Thumbnail size
- Thumbnail zoom behavior
- Auto-scroll preferences
- Whether to show icons on a document page for notes and annotations
- Rubberband behavior

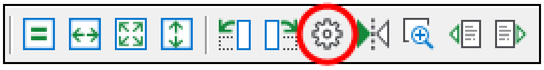
- Zoom region preferences
- Blank page display preferences
- Connection timeout preferences

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

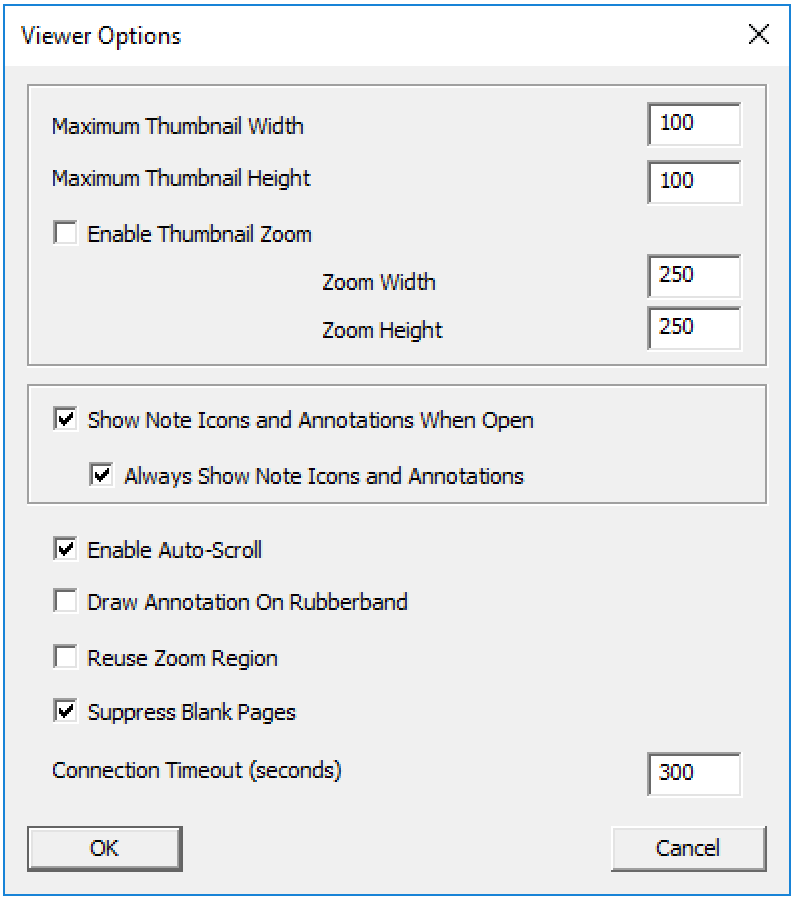
Changing Thumbnail Size

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

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



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

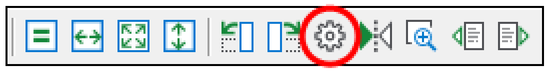


2. In the **Maximum Thumbnail Width** field, type the number of pixels that defines the maximum width for thumbnails. For example, the default setting is **100**, which means that no thumbnail in the **Pages** toolbar will ever be wider than 100 pixels. You can specify any width from 32 pixels through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

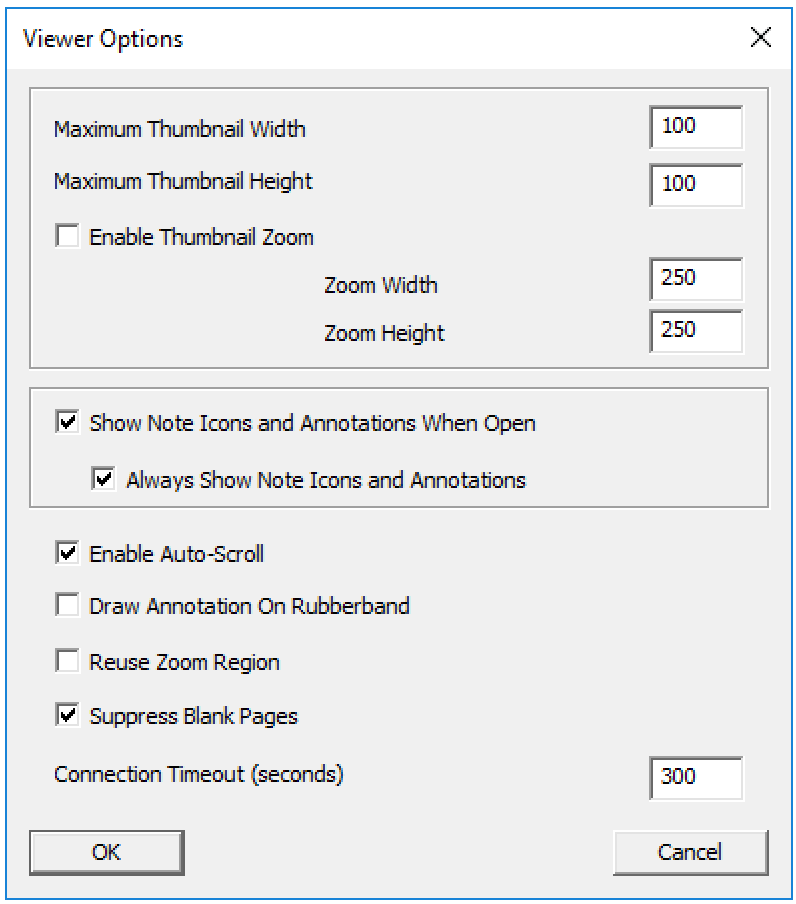
Change Zoomed Thumbnail Size

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

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



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



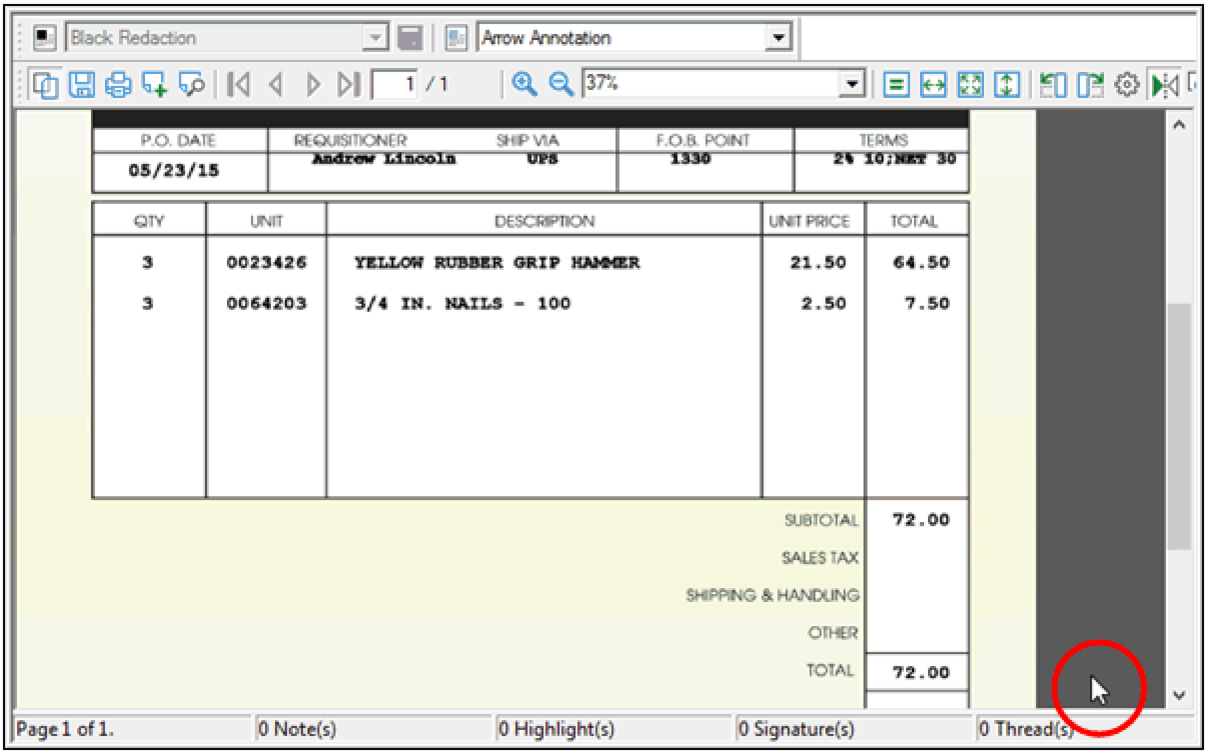
2. Select the **Enable Thumbnail Zoom** check box if you want thumbnails to be magnified to the specified dimensions whenever you place your pointer over them. Clear the check box if you want thumbnails to remain the same size.
3. In the **Zoom Width** field, type the maximum width in pixels of the zoomed thumbnail. You can specify any value between 32 and 1024.

4. In the **Zoom Height** field, type the maximum height in pixels of the zoomed thumbnail. You can specify any value between 32 and 1024.
5. Click **OK** to save your changes and close the page. OnBase immediately changes the dimensions for zoomed thumbnails. The next time you hover your mouse pointer over a thumbnail, it will be zoomed to the new size.

Enable Auto-Scroll

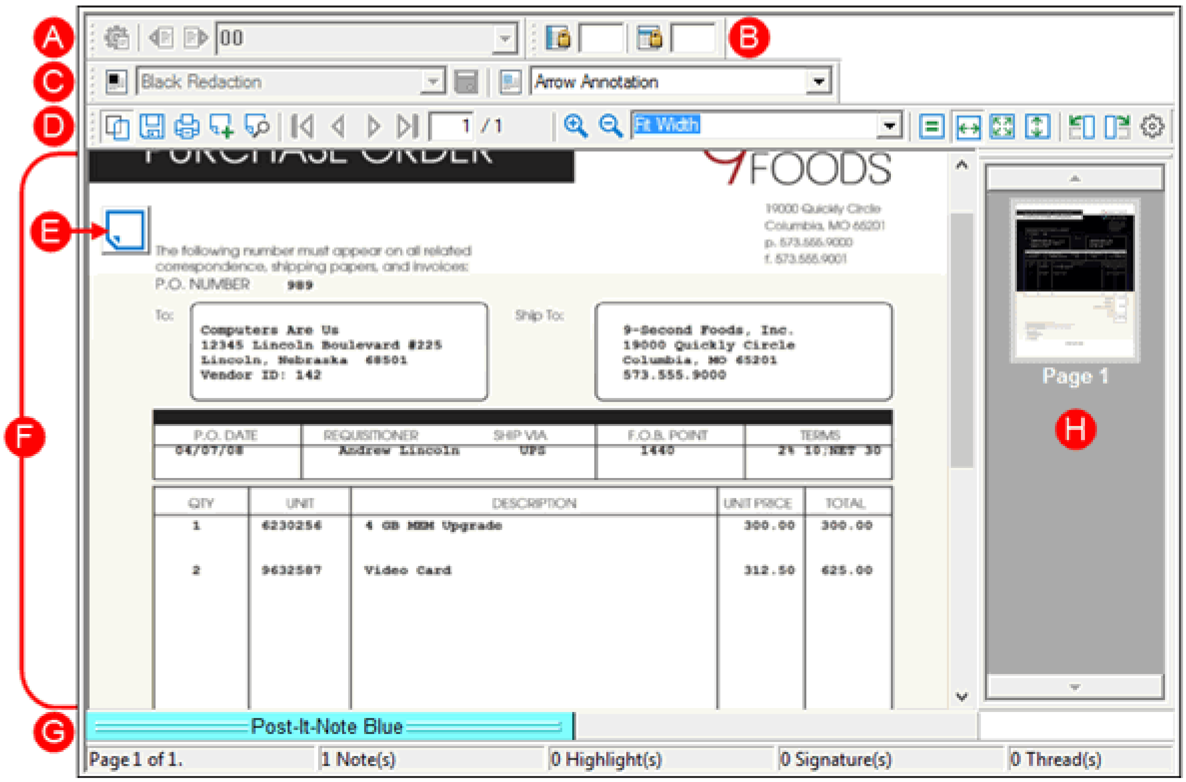
Select this option to enable auto-scrolling on documents. Auto-scrolling allows you to place the pointer at the edge of the viewer and scroll through the document vertically or horizontally. For example, to scroll down, you would place the pointer at the bottom of the viewer.

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



Display Options for Notes and Annotations

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



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

Show Note Icons and Annotations When Open

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

Always Show Note Icons and Annotations

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

Draw Annotation On Rubberband

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

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

Retaining the Zoom Region from Page to Page

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

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

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

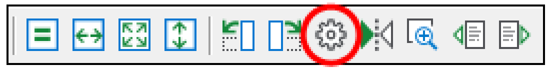
Suppressing Blank Pages

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

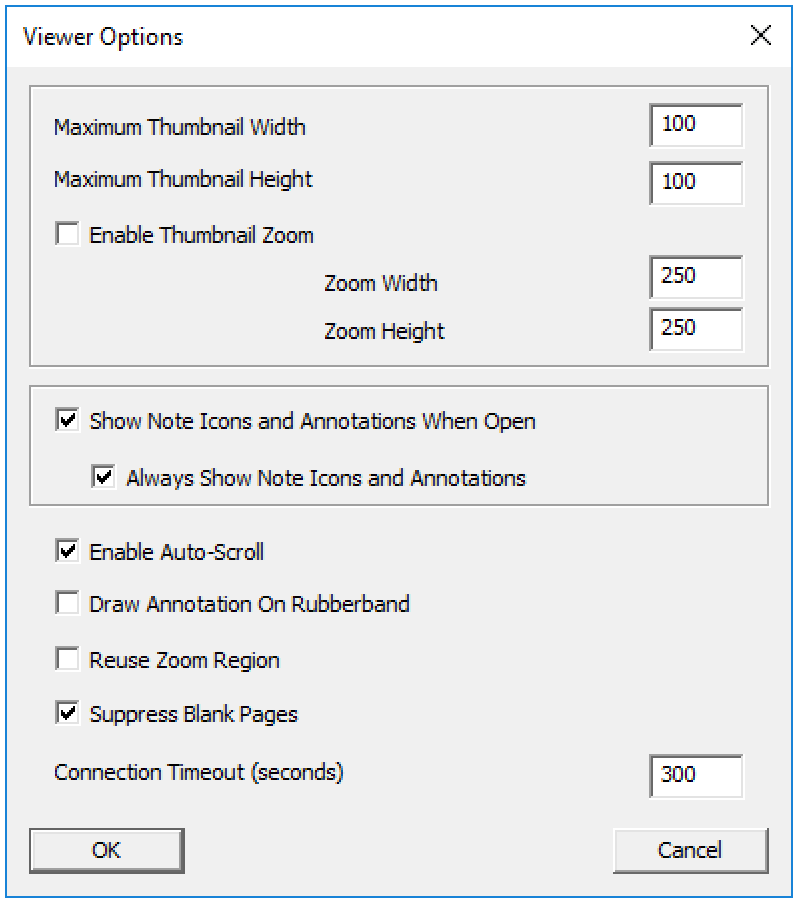
Note: The **Suppress Blank Pages** function is not supported in the ActiveX Web Client.

To suppress blank page thumbnails in the Document Viewer:

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



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

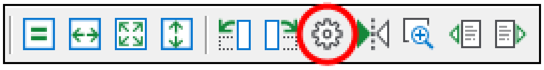


2. Select the **Suppress Blank Pages** check box. Clear the check box if you want the blank pages to remain in the **Pages** toolbar.
3. Click **OK** to save your changes. OnBase immediately changes the display of the thumbnails in the viewer based on whether or not the **Suppress Blank Pages** option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

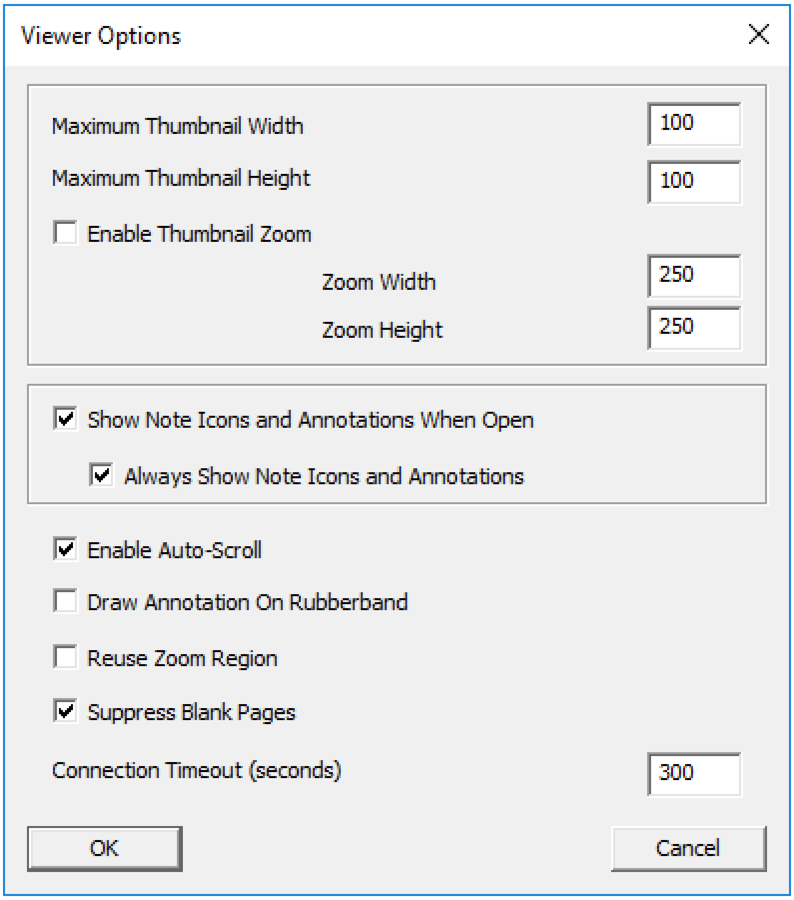
Adjusting Connection Timeout

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

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



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



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

Navigate

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

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

Scale

The Scale feature provides options for viewing documents.

Option	Description
Actual Size	Displays the document without any viewer scaling (i.e., in the same aspect ratio in which it was acquired).
Fit Width	Scales the display of the current page in the viewer as adjusted per the maximum width of the page in the viewer.
Fit Height	Scales the display of the current page in the viewer as adjusted per the maximum height of the page in the viewer.
Fit in Window	Scales the display of the current page in the viewer according to the maximum viewer area.
Zoom In **Zoom Out**	Magnifies (**Zoom In**) or reduces (**Zoom Out**) the displayed area of the image in the viewer.

Option	Description
True Size	Displays the image at its original size (monitor DPI divided by image DPI when rendering at 100%). For example, if you scanned a 3" x 3" paper document into OnBase, the document displayed at True Size would occupy 3" x 3" of screen space. **Note:** Digital images, such as GIF and ICO files, can have undefined DPIs. For images whose DPIs are undefined, the **True Size** option uses a default image DPI of 200.

Process

There are several process options available when viewing documents.

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

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

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

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

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

Note: You can only save rotations on image documents.

Display

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

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

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

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

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

Previous Document / Next Document

From an open document, you can navigate to the previous or next document in a document results list. Multiple methods are available, depending on the type of document you are currently viewing. See the following topics:

- E-Forms & HTML Documents on page 188
- Image & Text Documents on page 188
- OLE (Office) Documents on page 188
- PDF Documents on page 188

Note: If the document is opened in an external viewer, the following navigation methods may be unavailable.

E-Forms & HTML Documents

Use one of the following methods to navigate from an E-Form or an HTML document:

- Right-click the document and select **Previous Document** or **Next Document**.
- Press **Ctrl + F6** (previous document) or **Ctrl + F7** (next document).

Image & Text Documents

Use one of the following methods to navigate from an image or text document:

- Right-click the document and select **Previous Document** or **Next Document**.
- Click the **Previous Document** button or the **Next Document** button in the Viewer Control toolbar.
- Press **Ctrl + F6** (previous document) or **Ctrl + F7** (next document).

OLE (Office) Documents

Use the following method to navigate from an OLE document, such as a Microsoft Word document:

- Select **Previous Document** or **Next Document** from the menu bar above the viewer.

PDF Documents

Use one of the following methods to navigate from a PDF document:

- Click the **Previous Document** button or the **Next Document** button in the Viewer Control toolbar.
- Select **Previous Document** or **Next Document** from the menu bar above the viewer.

Encoding

While viewing a text document, you can change the document's character encoding format. With additional rights, you can also save the selected encoding format as the default encoding format for that document.

1. Right-click on an open text document and navigate to **Encoding**.
2. Select one of the available encoding formats.

   The document is refreshed to display in the selected format. To save this encoding format as the default for this document, right-click and navigate back to **Encoding**.
3. Click **Save Encoding**. The selected encoding format is saved as the default for this document.

Working with Keywords

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

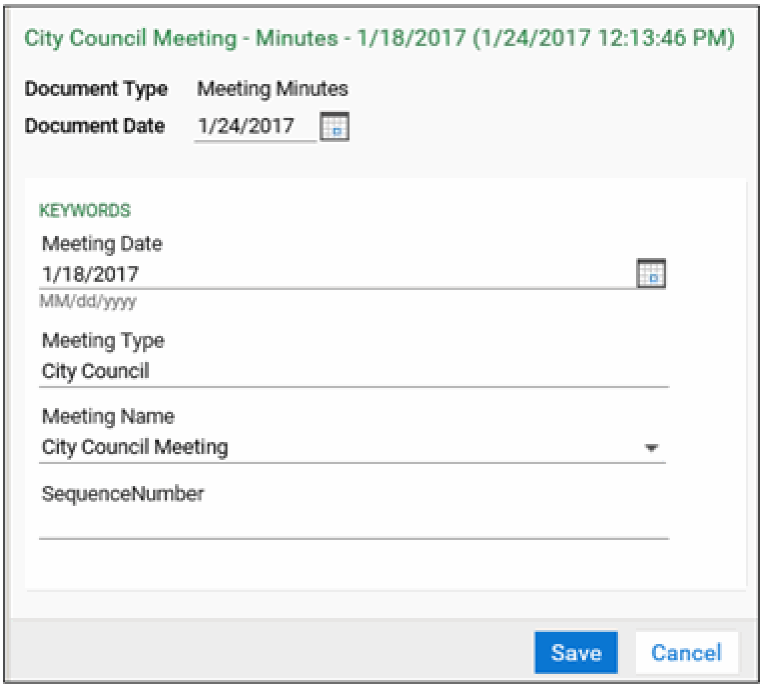
Access a Document's Keyword Values

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

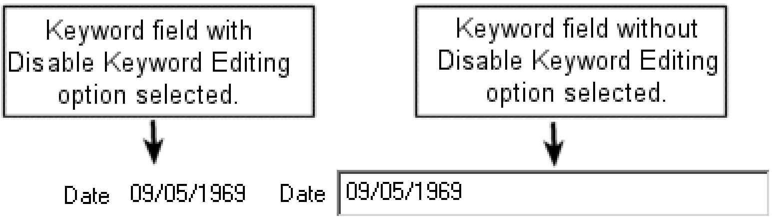
To access a document's Keyword Values, do one of the following:

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

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



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



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

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

Adding and Modifying Keywords

Use the **Add / Modify Keywords** dialog box to view or modify the document Keyword Values. Right-click an open document or a document name from a Document Search Results list and select **Keywords**.

To view or modify Keyword Values in the HTML Web Client, you can also press **Ctrl + K** while in a search results list or while viewing a document to display the **Add/Modify Keywords** dialog box. Depending on your user rights, the dialog box may be titled **View Keywords** instead.

To view or modify an open OLE document's Keyword Values in the Web Client, select **Edit | Keywords**.

Note: The **Ctrl + K** keyboard shortcut is not available for OLE documents.

The title line of the **Add/Modify Keywords** dialog box displays information about the document. The first two lines display the **Document Type** and document name respectively.

Note: If this document is checked out by another user, the Keyword Values will not be able to be modified regardless of privileges. The Add / Modify Keywords dialog box will be displayed, but all Keyword Values will be read-only.

Note: You cannot change Keyword Values on E-Forms that have been signed. When a form is signed, the Add/Modify Keyword dialog box becomes read-only and the re-index menu option is disabled for the form.

Document Date

The **Document Date** field displays the date the system matches in a search for documents based on a date or date range. You can change the date.

Dates use the Windows Regional Settings for formatting.

Keywords

The **Keywords** section displays the Keyword Types and Keyword Values currently associated with the document. The Keyword Value is blank if no Keyword Value is currently assigned.

You can use the **Add / Modify Keywords** dialog box to remove, change, or add a Keyword Value:

- To remove a Keyword Value from a document, delete the contents in the Keyword Type field.
- To change the value, edit the Keyword Value currently residing in the Keyword Type field
- To add another value for a Keyword Type, place the cursor in the Keyword Type field and press **F6,** or click the Keyword Type name. An additional field is displayed for the Keyword Type. Fill in the additional Keyword Value.

You cannot duplicate Keyword Types in Single-Instance Keyword Type Groups or Cascading Data Sets.

If you duplicate a Keyword Type within a Multi-Instance Keyword Type Group, another instance of the entire Multi-Instance Keyword Type Group will be added, not just the Keyword Type. This is because all Keyword Types within the Multi-Instance Keyword Type Group are part of a record. When you choose to duplicate the Keyword Type, you must duplicate the entire record.

It is recommended that all Keyword Type Values are indexed when a Multi-Instance Keyword Type Group is duplicated, even if only one Keyword Value is different between the original Keyword Type Group and additional instances.

A calendar button is available next to date-based Keyword Types, allowing you to select a date from a calendar. A drop-down arrow may be available for some alphanumeric Keyword Types, allowing you to select a value from the Keyword Values in the list.

If a security mask is applied to one of the Keyword Types and you have the **Access Security Masked Keywords** privilege, the **View Security Masked Keyword** toggle button is available.

- To view security masked Keyword values without the security mask, click:

- To view security masked Keyword values with the security mask, click:

Note: In some instances, changing Keyword Values will affect the appearance of your document. Change Keyword Values carefully.

Viewing and Editing Keywords for HTML Documents

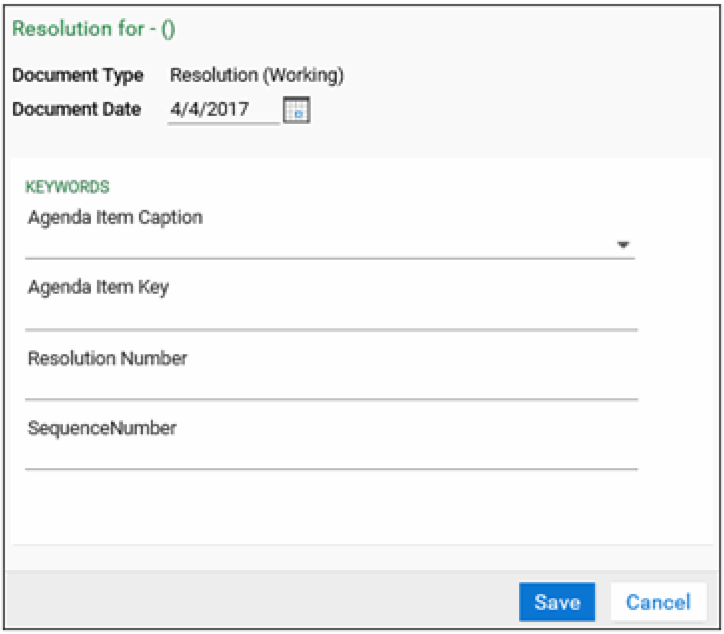
You can view and edit the Keyword Values for a document that is currently displayed in the Document Viewer or a document that is listed in the Document Retrieval list. You can also view and edit the Document Date, which is the date assigned to a document when it was imported into the system.

Some documents have one or more Keyword Values displayed automatically when you open the document. These Keyword Types are configured by your system administrator to Auto Display.

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

1. View Keyword Values using one of the following methods:
   - From the Document Search Results list, select the document, then right-click and select **Keywords**.
   - From an open document, right-click and select **Keywords**.

   The dialog box is displayed, allowing you to add or modify Keyword Values.



2. Edit the Keyword Values as needed.
3. When finished, click **Save** to exit and save changes, or click **Cancel** to exit without saving changes.

Note: You will be unable to modify Keyword Values if the Document Type is configured to Disable Keyword Editing, if the Keyword Values are locked by another user, or if you have insufficient privileges. Under these conditions, the values will be shown as read-only text (instead of editable field values), and the **Save** button will be disabled.

Mixed Case Keywords

Keyword Types configured for an **Alphanumeric Data Type** must be assigned a **Character Case** setting. There are two Character Case options that may be assigned to a Keyword Type: **Uppercase Values** and **Mixed Case Values** with an option for **Case Sensitive Searching**.

Keyword Types configured for **Uppercase Values** store the Keyword Value in uppercase letters, regardless of how the Keyword Value was entered upon indexing. Keyword Types configured for **Mixed Case Values** store the Keyword Value upon indexing exactly how it was entered, using both upper and lower case characters.

See your system administrator for details on Keyword Types that may be configured for Mixed Case Values.

Searching on Mixed Case Keyword Values

With Case Sensitive Searching Applied

Whether you are searching for documents through Document Retrieval, cross-references, etc., you must be aware of the case that was entered when the document was indexed. For example, “JOHN ADAMS” and “John Adams” are separate values and will not produce the same results if the Keyword Value is not entered correctly.

Without Case Sensitive Searching Applied

If a Keyword Type does not have Case Sensitive Searching applied to it, then the value you enter on a document will not depend on the case used when indexed. For example, the Keyword Value when indexed is “John Adams”. However, when searching you may type in “JOHN ADAMS” and retrieve the document. In this instance, “John Adams” and “JOHN ADAMS” are not separate values, however, the Keyword Value will display as it was originally indexed.

See your system administrator for details on Keyword Types that may be configured for Case Sensitive Searching.

Indexing Mixed Case Keyword Values

When indexing or re-indexing a document, two Keyword Values with the same value, but a different case may not be stored on the same document.

For example, the values “JOHN ADAMS” and “John Adams” cannot be indexed under the same Keyword Type on the same document.

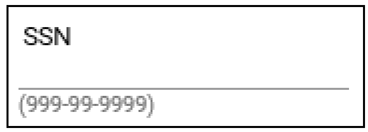
Masked Keywords

Masked Keyword Types must have values entered in a specific format, called a mask format. Fields for masked Keyword Types prohibit you from typing values that do not satisfy the mask format.

For example, a masked Keyword Type for Social Security Numbers may contain dashes as static characters and allow users to enter only nine numeric characters. The dashes are entered automatically as the subsequent characters are typed.

Depending on your system's configuration, a mask may also be applied to certain Keyword Values upon retrieval.

In the Keyword Panels for retrieving, importing, indexing, and re-indexing documents, the mask format is displayed below the Keyword Type field, as shown in the following example:



Mask formats are composed of characters that represent the types of characters accepted in a valid Keyword Value. Use the following table to determine what types of characters you must enter to satisfy a mask format for a masked Keyword Type.

Mask Format Character	Description
A	Accepts alphabetic characters only. Special characters such as é or ñ are allowed.
X	Accepts any printable, alphanumeric character (except control codes).
0	Accepts numeric characters only.
9	Accepts numeric characters and the following symbols: **+**, **-**, **.**, *****.
Any other character	Accepts only the character displayed in the mask format. For example, if the mask format is **000-00-0000**, then a dash must be entered for the fourth and seventh characters; all other characters must be numeric. Blank spaces may also be used. For example, if the mask format is **0 000**, then the second character must be a space. The Web Client automatically enters these static characters for you as you type subsequent characters, so you do not need to type them manually. If a static character is at the end of a mask format, the Web Client enters it automatically when you type the second-to-last character.

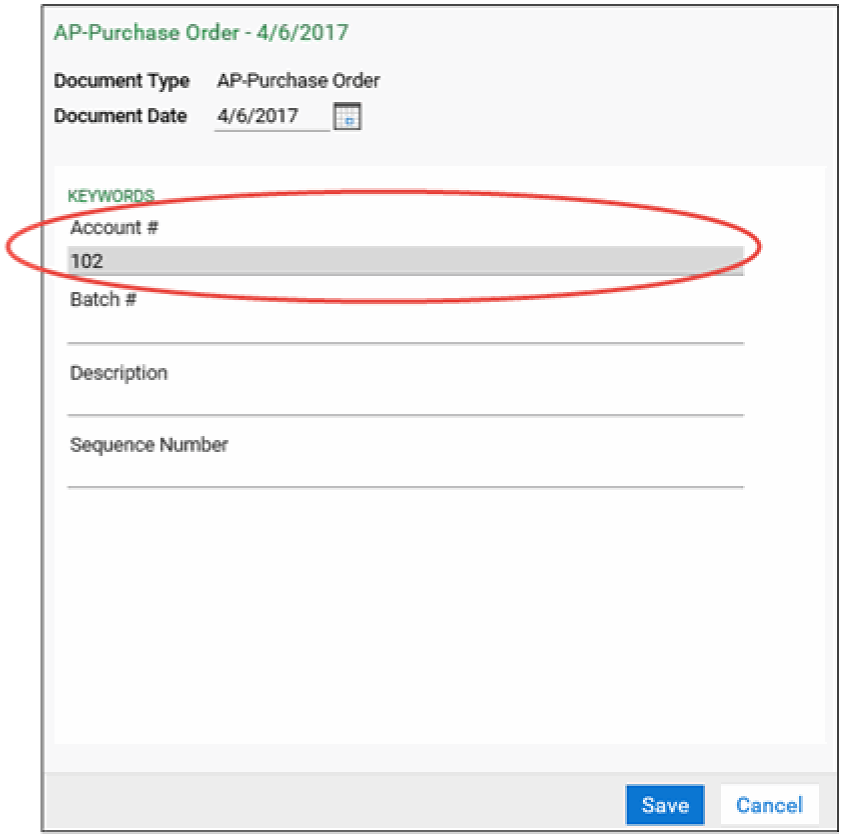
Viewing Read-Only Keywords

Sometimes you can view, but not modify some or all of the Keyword Values on a document.

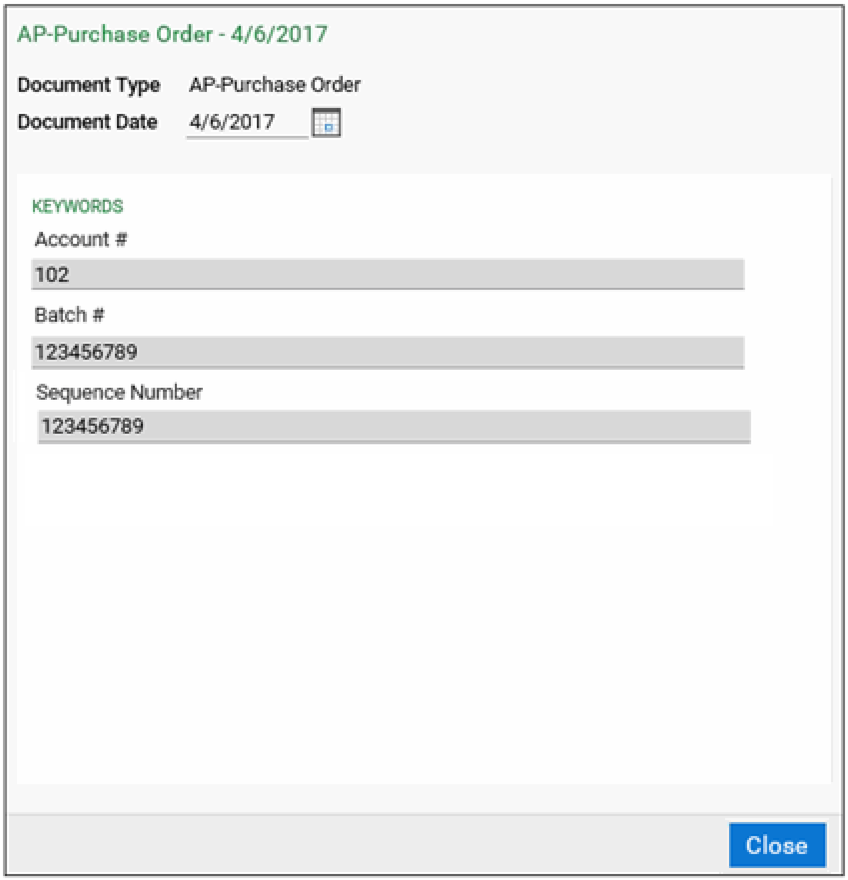
This can be for any of the following reasons:

- Keyword Types can be configured to appear as read-only, as well as masked, to certain User Groups. If this is the case, the **Add/Modify Keywords** dialog box will resemble the following:

  In the following example, the **PO #** Keyword Type is configured as read-only at the Document Type level. The user is unable to modify this Keyword Value. The user is able to modify the other Keyword Values.



- The User Group that you belong to does not have the right to **Modify** Keyword Values. The **Add/Modify Keywords** dialog box displays in read-only mode:



- When you elect to view Keyword Values on a document, OnBase displays a message that someone has the document checked out, or locked. The **Add/Modify Keywords** dialog box displays in read-only mode. Depending on your system setup, this happens if a document is checked out by another user, or if it is persistently checked out.

Note: When you open **Add/Modify Keywords** or the **Re-Index Document** dialog box, the document is locked for your use so you can modify Keyword Values and save the changes. The document is unlocked when the dialog box is closed. When another user attempts to Add/Modify Keyword Values or re-index and a document is locked, the user can view the Keyword Values, but not modify them.

Records of Information Using Multi-Instance Keyword Type Groups

Most Document Types are assigned several Keyword Types, whose values contain information about the document. Some documents have multiple values for one Keyword Type. For example, a checking statement could have a Keyword Type called First Name that has both John and Sarah as values.

Because documents can contain multiple sets of Keyword Values, Document Types have the ability to maintain records of information. A record of information is a group of Keyword Types whose individual Keyword Values maintain a relationship with each other when additional Keyword Values are added to the document.

Your system administrator configures Document Types with Keyword Types and Keyword Type Groups.

AutoFill Keyword Set Instance

An AutoFill Keyword Set instance is a Primary Keyword Value and its corresponding Secondary Keyword Values on a document.

- A document may contain one or more instances, depending upon its configuration.
- Many instances can compose the total AutoFill Keyword Set.

Using AutoFill Keyword Sets When Indexing or Re-Indexing

An AutoFill Keyword Set is a collection of Keyword Values dependent upon a Primary Keyword Value. If an AutoFill Keyword Set is assigned to a Document Type, a value entered into the Primary Keyword Type field during indexing of a document triggers the population of the remaining Keyword Types with values from the AutoFill Keyword Set.

Indexing with AutoFill Keyword Sets

1. From the **Import Document** layout, enter the first Keyword Value and press the **Tab** key on the keyboard. The remaining values for the remaining Keyword Types in the AutoFill Keyword Set will populate in their respective fields. If you entered a Primary Keyword Value that has more than one AutoFill Keyword Set associated with it, the **Select Keyword Set** dialog box is displayed. Continue to Step 2. Otherwise, skip to Step 6.

Note: In the OnBase Web Client, if the Primary Keyword Value is the last Keyword Value in the panel, you must press **Shift + Tab** to trigger the AutoFill Keyword Set.

2. If you are prompted to select which AutoFill Keyword Set to use, the Primary Keyword Value has more than one AutoFill Keyword Set associated with it. For example, both the Plaintiff and the Defendant may share the same Case#, so there may be two separate sets of values for a Case# Primary Keyword Value.
    - Depending on how your system is configured, you may be allowed to choose one or more of the AutoFill Keyword Sets.
    - If you are permitted to select only one set, the values of your selected set are displayed in the indexing fields.
    - If you are permitted to select multiple AutoFill Keyword Sets, the document is indexed with values from both AutoFill Keyword Sets.
    - You can sort the list of AutoFill Keyword Sets by clicking on the column to sort by.
3. Select the AutoFill Keyword Set(s) from the list and click **OK**.
4. Keyword Values are displayed according to the order in which their associated Keyword Types are configured to display on the Document Type. Depending on the AutoFill Keyword Set's configuration, these values may be read-only.

    For example, if a loan document associated with a loan taken out jointly by two customers is associated with one Keyword Value for **Account #**, **Last Name**, and **Address**, but two different Keyword Values for **First Name**, then an additional instance of the **First Name** Keyword Type is added after the first and both Keyword Values for **First Name** are displayed. Only one instance of a Keyword Value common to both sets is displayed.

Note: If you have expanded an AutoFill Keyword Set that includes hidden or restricted Keyword Types, the indexing panel will be cleared if you then click **Choose File** to upload a file. It is recommended to upload the file first, and then index the document using the AutoFill Keyword Set.

5. You can verify if the Keyword Set Configuration permits multiple sets by checking the **Settings**. In the Configuration Module, select **Keyword | AutoFill Keyword Sets**, select the AutoFill Keyword Set you want to verify and click **Settings**.

Note: Your User Group must have rights to that AutoFill Keyword Set to have access to it in the **AutoFill Keyword Sets Configuration** dialog box.

The **Allow Multiple Keyword Set Selection** will be checked if the AutoFill Keyword Set is configured to allow for more than one set of AutoFill Keyword set values for one Primary Keyword Value. This setting can be changed once the AutoFill Keyword Set has been created.

6. When all fields are populated, click **Import** to finish or display the **Import Document** dialog box for the next document.

Note: If you change the Primary Keyword Value and press **Tab**, all Secondary Keyword Values are updated to reflect the new Primary Keyword Value. If you create another Primary Keyword Type field and enter a second Primary Keyword Value, OnBase adds another set of values associated with the second Primary Keyword Value while retaining the values associated with the first Primary Keyword Value.

Note: Every workstation that will be accessing External AutoFill Keyword Sets must have an ODBC connection that has the same name as the one configured in the Configuration module. See your system administrator for details. In the case of Web Server, only the Web Server itself must have the ODBC connection, not the client workstations.

Re-Indexing with AutoFill Keyword Sets

1. While a document is open in the Document Viewer or selected in the Document Search Results list, right-click and select **Re-Index**. The **Re-Index Document** dialog box is displayed.
2. Using the drop-down, select the **Document Type** to which the document is to be re-indexed.

Caution: AutoFill Keyword Sets may unexpectedly re-populate Secondary Keyword Values when re-indexing to a Document Type associated with the same Keyword Type Group (KTG) or Multi-Instance Keyword Type Group (MIKTG) as the current Document Type. For more information, see Considerations for Re-Indexing Documents and Adding or Modifying Keyword Values on page 219.

3. Select the **Document Date** using the Calendar or by entering a date in the field.

4. If necessary, modify the Keyword Values on the document:

   Changing the Primary Keyword Value to another Primary associated with the AutoFill Keyword Set: If this occurs, all Secondary Keyword Values are updated to reflect the values associated with the new Primary Keyword Value.

   To avoid undesired Keyword Value changes, click on any field in the dialog box before clicking the **Re-Index** button. This will trigger the AutoFill Keyword Set and allows the user to review any changes made to the Secondary Keyword Values before re-indexing the document.

   If more than one AutoFill Keyword Set is associated with the same Primary Keyword Value: Multiple AutoFill Keyword Sets are displayed in a selection box after the Primary Keyword Value is entered. Depending on how your system is configured, you may be able to select one AutoFill Keyword Set or you may be able to select multiple AutoFill Keyword Sets.

   If you are only permitted to select one AutoFill Keyword Set, the Keyword Values associated with the AutoFill Keyword Set populate the Keyword Type fields.

   If you are permitted to select more than one AutoFill Keyword Set, the document is indexed with Keyword Values from all AutoFill Keyword Sets. Only one instance of a Keyword Value common to both sets is displayed. Additional instances of Keyword Types are added to hold Keyword Values not common to both AutoFill Keyword Sets.
5. Add Keyword Values to any Keyword Types that are not associated with the previous Document Type but are associated with the new Document Type.
6. Click **Re-Index**.

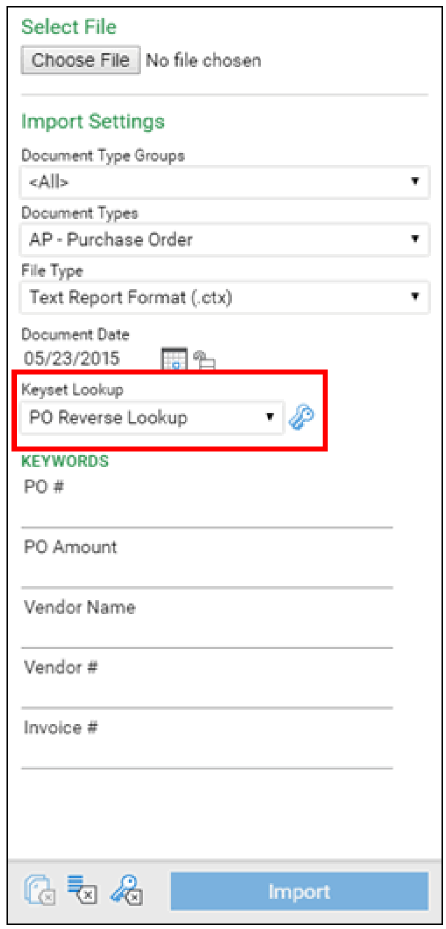
   Once the document has been re-indexed, it no longer exists in the database as the original document, and can only be retrieved using the new Document Type and any new Keyword Values.

Using a Reverse AutoFill Keyword Set Lookup

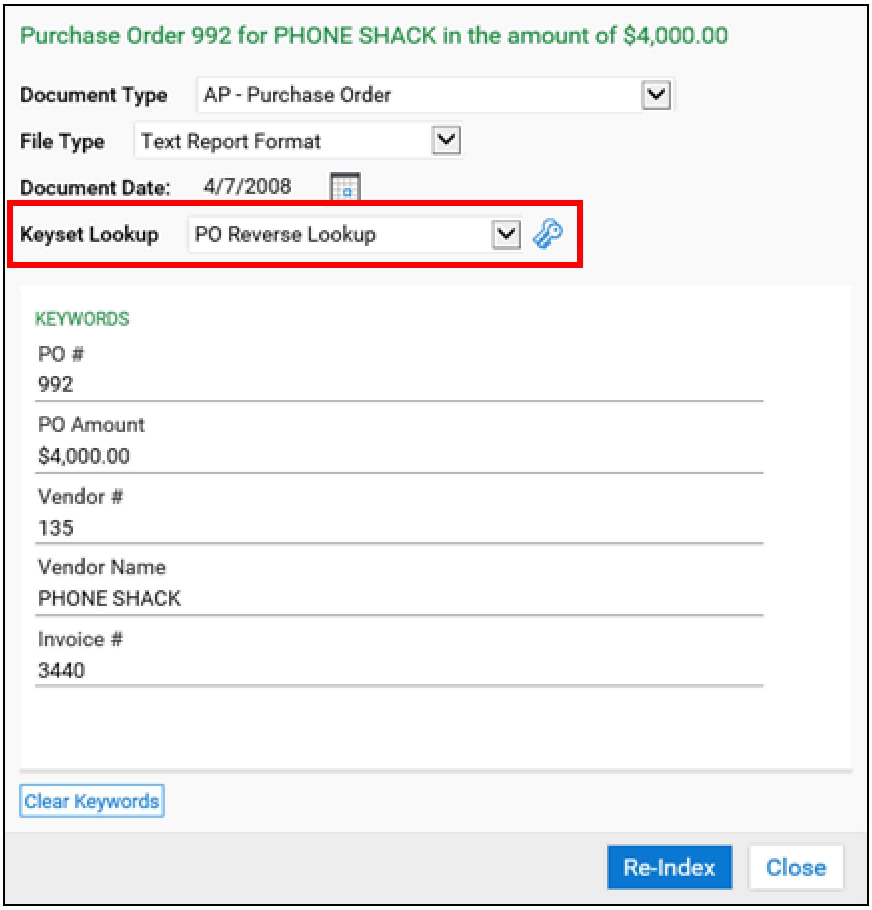
To use a Reverse AutoFill Keyword Set Lookup to find an AutoFill Keyword Set:

1. From the **Import Document** panel, use the **Keyset Lookup** drop-down list to select the Reverse AutoFill Keyword Set Lookup you want to use to select an AutoFill Keyword Set, and click the **Search** icon button.

Note: The lookup drop-down list is displayed if a Reverse AutoFill Keyword Set is configured for the selected Document Type or any of the document's Keyword Types.



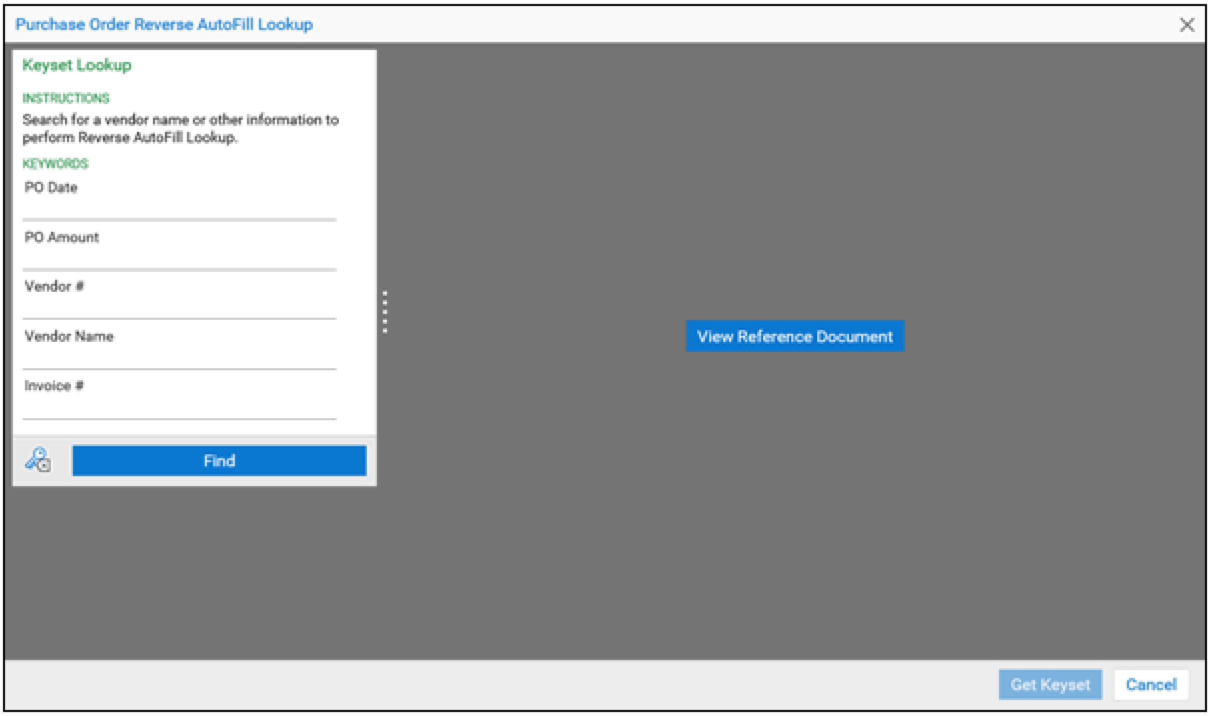
The lookup drop-down list is also available when re-indexing a document from the **Re-Index Document** dialog box.



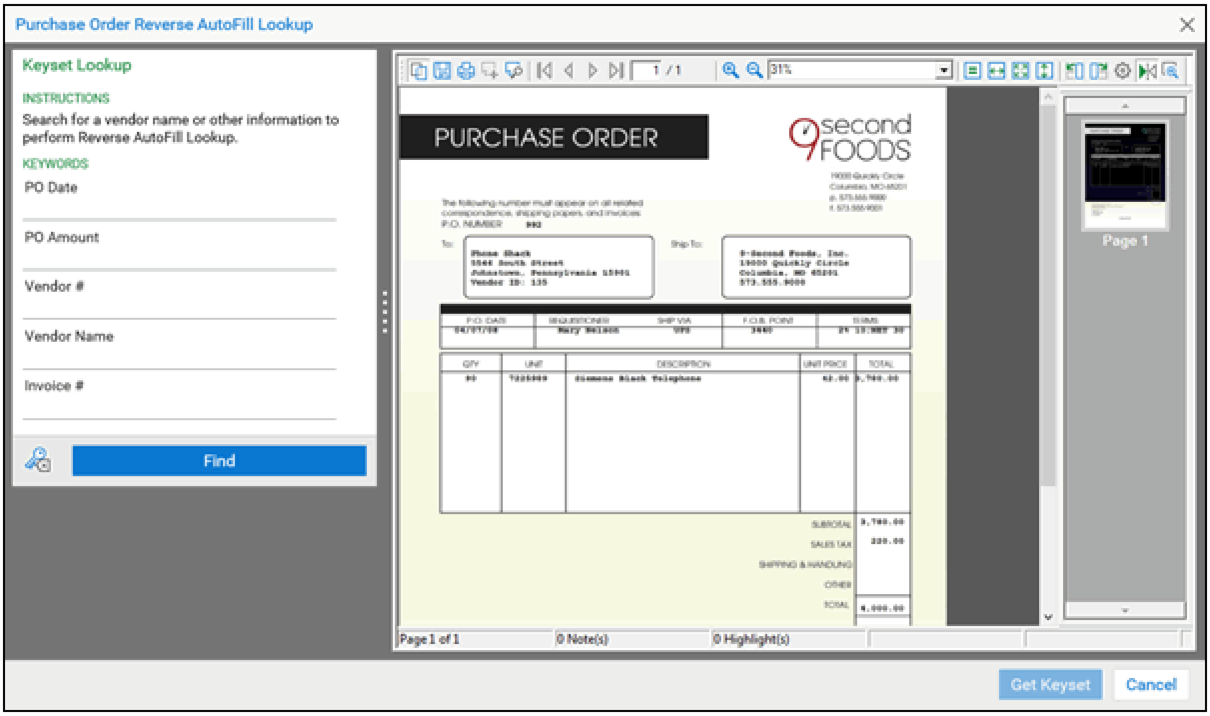
Note: If multiple AutoFill Keyword Sets are assigned to the Document Type, more than one Reverse AutoFill Keyword Set Lookup may be available in the lookup drop-down list.

2. Once a Reverse AutoFill Keyword Set Lookup has been selected from the lookup drop-down list, the **Search** dialog box is displayed.

Note: For example purposes, this documentation refers to the **Search** dialog box, but the actual title of the dialog box is configurable and is set by your OnBase administrator.



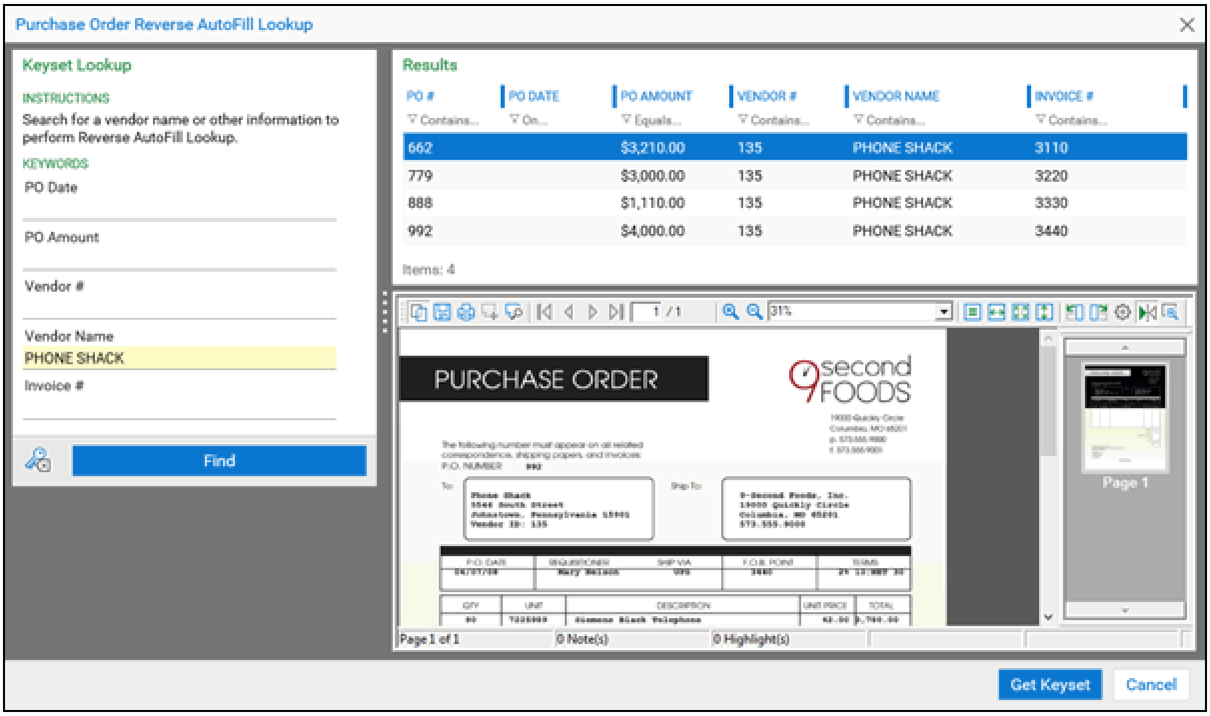
3. If you want to view the document you are indexing or re-indexing as a reference while performing the Reverse AutoFill Keyword Set Lookup, click the **View Reference Document** button. The document is displayed next to the **Search** dialog box.



4. In the **Search** dialog box, one or more of the AutoFill Keyword Set's Secondary Keyword Types are displayed. Enter any known Keyword Values and click **Find**.

Note: Reverse AutoFill Keyword Set Lookups work correctly with encrypted Keyword Types as long as the entire secondary value is searched.

AutoFill Keyword Sets that match the search criteria are displayed.

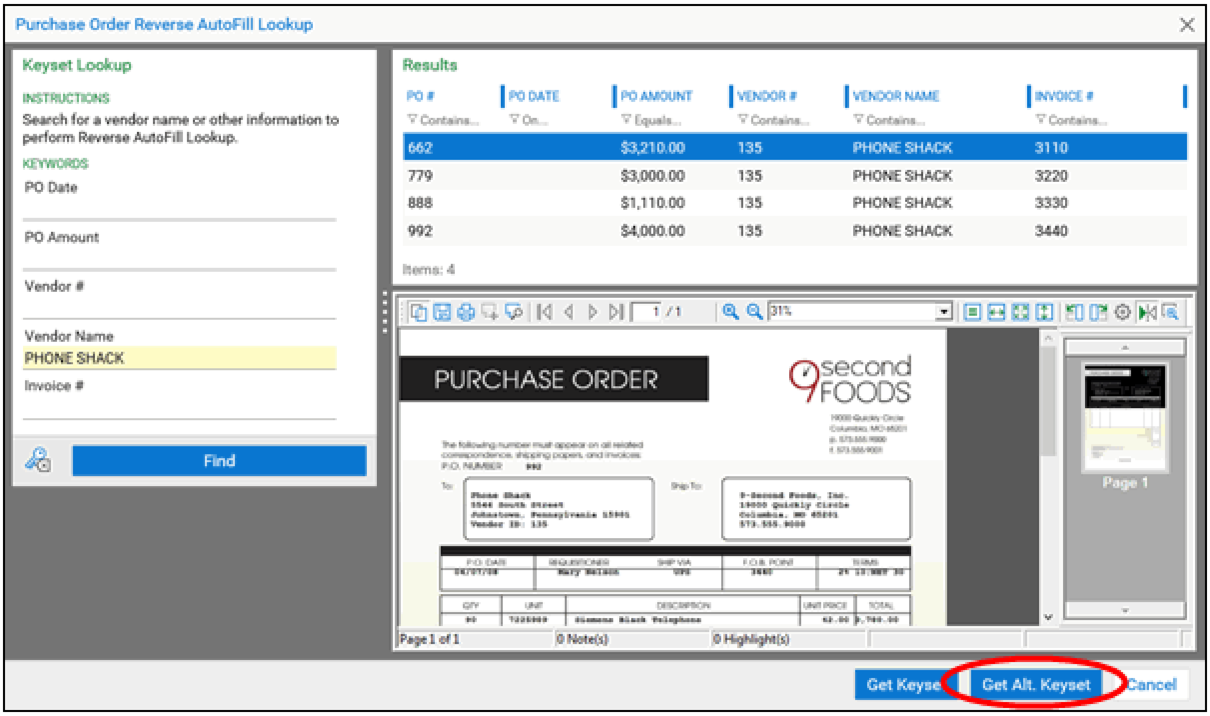


5. Depending on the configuration of the Reverse AutoFill Keyword Set Lookup, you may be able to search, filter, or sort the results to assist you in finding the correct AutoFill Keyword Set.
6. Once you have identified the correct AutoFill Keyword Set, double-click the selected AutoFill Keyword Set or select it and click the **Get Keyset** button.

Note: For example purposes, this documentation refers to the **Get Keyset** button, but the actual name of the button is configurable and is set by your OnBase administrator.

The **Search** dialog is closed and the **Import Document** panel or **Re-Index Document** dialog box is displayed with the Keyword Values from the selected AutoFill Keyword Set displayed.

7. Depending on your Reverse AutoFill Keyword Set Lookup configuration, a **Get Alt. Keyset** button may also be displayed that will expand the AutoFill Keyword Set in a different manner. For more information on this option, contact your OnBase administrator.



Note: For example purposes, this documentation refers to the **Get Alt. Keyset** button, but the actual name of the button is configurable and is set by your OnBase administrator.

Use Keywords for Document Retrieval

Once you have selected a Document Type, its Keyword Type fields appear in the **Keywords** section. If a Keyword Type requires you to enter a value to search by, the Keyword Type is displayed in red.

Keyword Types that Contain Relationships

Some Keyword Types have been configured to provide smart searching capabilities for retaining relationships in retrieval.

Cascading Data Sets

If two or more of the Document Type's available Keyword Types contain drop-down lists and are ordered in such a way as to show a hierarchical parent/child relationship, the Keyword Types may be part of a Cascading Data Set.

Multi-Instance Keyword Type Groups

If the Document Type's available Keyword Types are displayed in a collapsed state with a + sign, the Keyword Types are part of a Multi-Instance Keyword Type Group.

Multi-Instance Keyword Type Groups can display in a collapsed state with only the name of the Multi-Instance Keyword Type Group showing, or they can display with the Keyword Values in the Keyword Type Group expanded.

If the Multi-Instance Keyword Type Group is displayed in a collapsed state, click the **Expand** symbol next to the first Keyword Type or press **Ctrl + O** to expand it to show the entire group.

Common Keyword Types for Document Type Groups and Multiple Document Types

If you select a Document Type Group or multiple Document Types, Keyword Types common to all Document Types in the group display in the Keywords section.

For example, if you select two Document Types, one with Keyword Types of **Customer Name** and **Account #**, and the other with **Customer Name** and **Address**, only the **Customer Name** Keyword Type field appears in the **Keywords** section.

Enter Keyword Values for which to search. If you do not enter Keyword Values, the system returns documents regardless of the Keyword Values associated with the documents. In most cases, advanced Keyword Operators can be used to further define your search.

- The **Clear Keywords** button removes text currently entered in the Keyword Type fields.
- The **Clear All** button clears all selected search criteria.

Note: If multiple Document Types are selected that use different Cascading Data Sets, OnBase ignores Cascading Data Sets and their associated Keyword Values are not available. If the Keyword Type in the Cascading Data Set was configured to use a Keyword Data Set, Keyword Values from this Keyword Data Set will be available. If the Keyword Type in the Cascading Data Set was not configured to use a Keyword Data Set, no Keyword Values will be available.

Add Another Value to a Keyword

You can click the Keyword Type name to add another instance of the Keyword Type, or place the cursor inside the Keyword Type field and press **F6**.

Note: You cannot add additional instances of Keyword Types that are part of a Single-Instance Keyword Type Group or a Cascading Data Set.

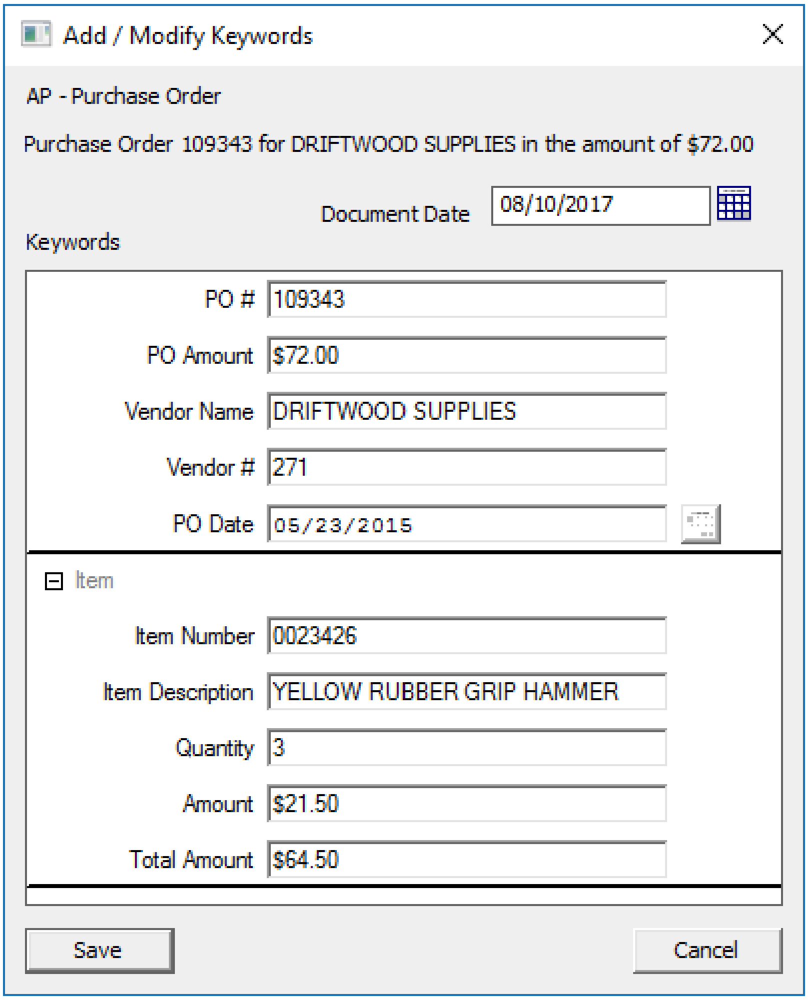
Multi-Instance Keyword Type Groups

If a Multi-Instance Keyword Type Group contains a Cascading Data Set, clicking a Keyword Type name or placing the cursor inside the Keyword Value field and pressing **F6** does not add another instance of the Multi-Instance Keyword Type Group. To add another instance of the Multi-Instance Keyword Type Group, double-click the name of the Multi-Instance Keyword Type Group in the **Keywords** pane.

Example of Adding an Instance of a Multi-Instance Keyword Type Group to a Document

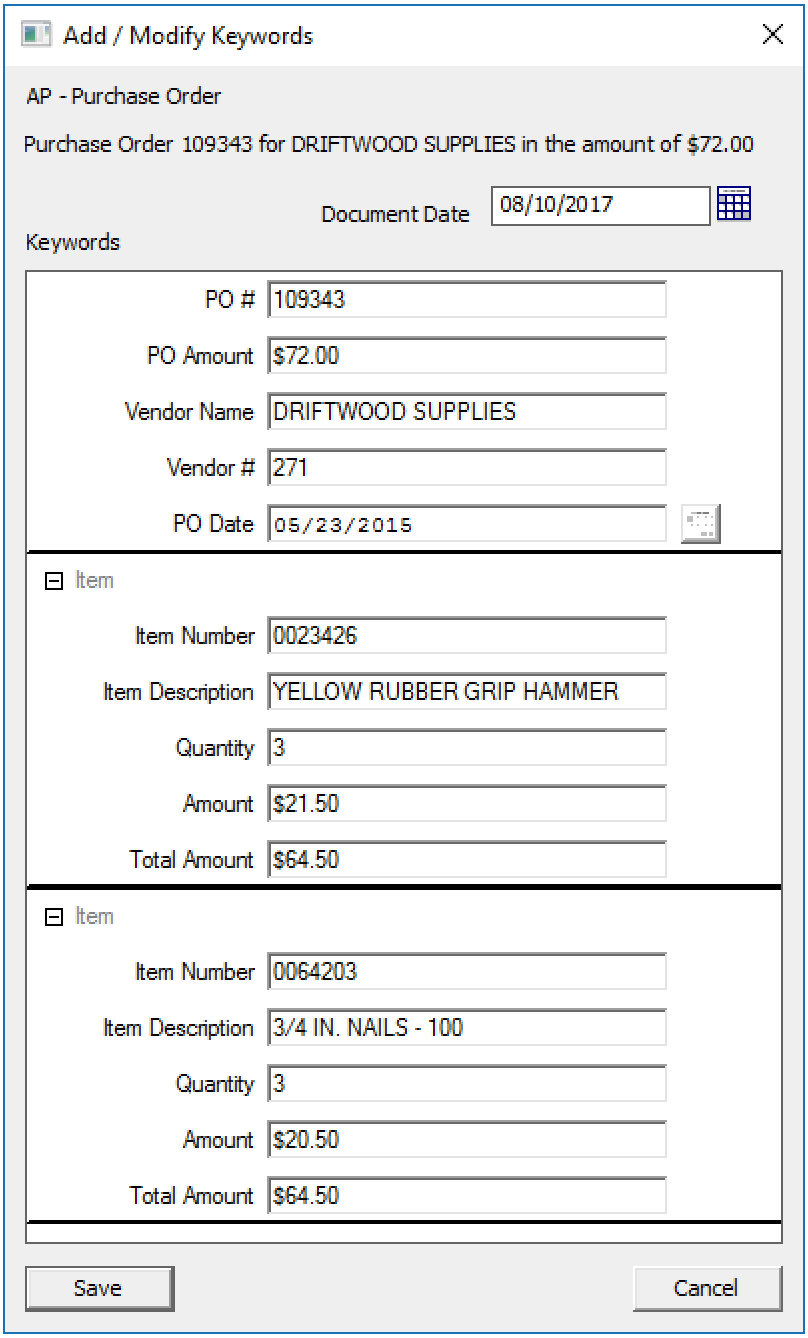
This example uses a Document Type called **AP - Purchase Order**. The Multi-Instance Keyword Type Group called **Item** is applied to **AP - Purchase Order**. A Multi-Instance Keyword Type Group is preferred in this scenario, because a purchase order is likely to contain more than one item, each requiring a separate group of Keyword Values.

The **Item** Keyword Type Group is the group of Keyword Values for each item on the purchase order and contains the Keyword Types **Item Number**, **Item Description**, **Quantity**, **Amount** and **Total Amount**. The example shown in the screen shot below displays an instance of a Multi-Instance Keyword Type Group for the **Yellow Rubber Grip Hammer**.



If you want to record more than one item on an **AP - Purchase Order** document, you can duplicate the Keyword Type Group to add the additional record to the document. The example shown in the screen shot below displays Keyword Values for two different items contained within the purchase order.

Note: It is recommended that you index all Keyword Values, even if only one Keyword Value is different between the original Keyword Type Group record and additional records.



Using Drop-Down Lists

The fields for some Keyword Types may contain a drop-down list. Select any value from this list as criteria for document retrieval. If the Keyword Type field contains any characters, values in the drop-down list are filtered by these characters. Your system administrator determines if a drop-down list appears for a Keyword Type, and what values will be in the list.

Note: To reduce the number of values displayed when accessing a drop-down list, you should type several characters into the Keyword Type field before expanding the drop-down list.

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

Keyword Operators and Extended Search Features

Extended Search Features allow you to narrow or expand your document search when retrieving documents.

Relational (Comparative) Operators

Relational (comparative) operators allow you to retrieve documents based on a range of Keyword Values, as well as exact Keyword Value matches. Select the Document Type Group and Document Type of the document you want to search for. Click the relational operator button to the left of the Keyword Type field to toggle through the available operators.

Note: Depending on your solution’s configuration, relational operators may be unavailable. If no operators are available, then you must enter the exact Keyword Value you want to retrieve. To broaden your search, you can include wildcard characters (***** and **?**) in your search criteria.

Blank Keyword Values on a document are not compared to the Keyword Values provided during document retrieval. If you use the <> operator to omit all documents indexed with a specified value, the search will not return documents that were indexed with a blank value. Some documents indexed with Keyword Type Groups may be returned, depending on the Keyword Type Group’s configuration.

The following operators may be available to search for:

Operator	Description
=	An exact Keyword Value match.
<>	Keyword Values that are not equal to the specified value.
>	Keyword Values that are greater than the specified value.
>=	Keyword Values that are greater than or equal to the specified value.
<	Keyword Values that are less than the specified value.
<=	Keyword Values that are less than or equal to the specified value.
"	The string literal operator (double quote) used with alphanumeric Keyword Types. Selecting this button will match the literal string. If a wildcard is used in the string, the search will look for the exact match, including the wildcard treated as a standard character.

Note: Available operators vary depending on the Keyword Type. For example, only the =, <>, and " operators are available for alphanumeric Keyword Types.

Logical Boolean Operators

If you have two or more fields for the same Keyword Type, each of these fields is separated from the next by one of the following logical operators: **And**, **Or**, or **To**. The current logical operator appears to the right of the first of the two Keyword Type fields.

You can create an additional Keyword Type field by clicking its name or pressing **F6** while your cursor is positioned in the data entry field of the Keyword Type you wish to add. This automatically inserts a logical operator button to the right of the original Keyword Type field.

Note: Depending on your solution’s configuration, logical operators may be unavailable. If you create multiple instances of a Keyword Type and there are no operators available, then the values you enter are treated as though they are joined by **And**.

To change the logical operator in use, click the logical operator button, which scrolls through the available options:

Operator	Description
And	Searches for documents containing the Keyword Values preceding and following the logical operator.
Or	Searches for documents containing either the value preceding the logical operator or the value following the logical operator.
To	Searches for all values that are between the two values (i.e., that are greater than or equal to the first value and less than or equal to the second value). This operator is unavailable for alphanumeric Keyword Types.

Note: When you use the **Or** operator and one document has both Keyword Values, OnBase retrieves two separate records for that document. For example, you perform a search for the Keyword Values Sarah Adams **Or** John Adams. If the same document has both values associated with it, then OnBase displays a record for each occurrence of the Keyword Value (one record for Sarah Adams, one record for John Adams).

If you have more than two Keyword Values for the same Keyword Type, then the logical operators are processed in order of occurrence.

Wildcard Characters

A wildcard character can be used to match Keyword Values where one or more characters are unknown. Wildcards can only be used to match alphanumeric Keyword Values.

Note: Depending on your system's configuration, some alphanumeric Keyword Types may not allow wildcard characters to be used, or searches that include wildcards may return unexpected results.

Type one of the following wildcard characters directly into the Keyword Type field to search for text strings containing one or more unspecified characters:

Wildcard	Description
*	The ***** wildcard character can be used to replace one or several characters of a text string. For example, the text string **Smit*** will find all instances of both **Smith** and **Smithsonian**.
?	The **?** wildcard character can be used to replace a single character in the text string. For example, the text string **SM?TH** will find all instances of both **Smith** and **Smyth**.

Adding Multiple Values to a Keyword Type

You can add additional values to a Keyword Type when retrieving documents or indexing:

- Click the Keyword Type Name, or
- Place the cursor inside the Keyword Value field and press **F6**

Multiple values of a Keyword Type are saved with documents only if Keyword Type values are populated (in other words, the additional Keyword Type field cannot be left blank). Once you delete the value from an additional instance of a Keyword Type and click **Save**, the additional instance is removed.

You cannot add multiple values to Keyword Types in a Single-Instance Keyword Type Group or a Cascading Data Set. You can add multiple values to Keyword Types in a Multi-Instance Keyword Type Group.

See your system administrator if you have questions about the configuration of Keyword Types on the Document Type.

Note: If you click on a Keyword Type name within a Multi-Instance Keyword Type Group, another instance of the entire Multi-Instance Keyword Type Group is added, not just another instance of the Keyword Type.

Note: When documents are indexed with multiple instances of the same Keyword Type, multiple results for the same document can be returned in a Document Search Results list. This occurs because of the way that OnBase searches for multiple Keyword Values.

Re-indexing

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

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

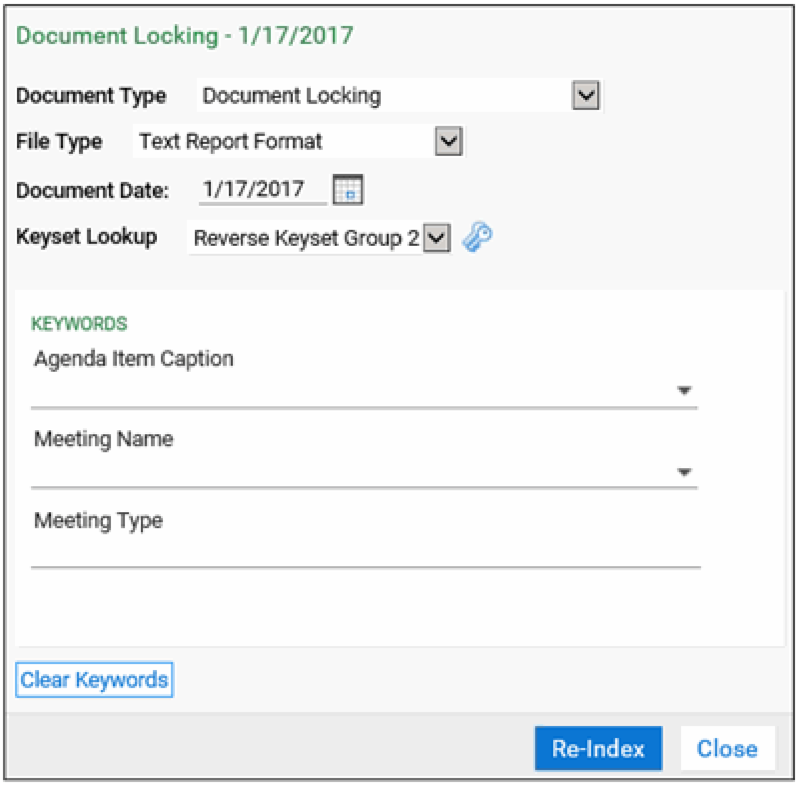
Re-Indexing Documents

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

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

Note: Ensure you understand the effects of re-indexing documents before proceeding. For more information, see Considerations for Re-Indexing Documents and Adding or Modifying Keyword Values on page 219.

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



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

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

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

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

Caution: If you are re-indexing a document associated with a Keyword Type Group (KTG) or Multi-Instance Keyword Type Group (MIKTG) filled by an AutoFill Keyword Set to another Document Type associated with the same KTG or MIKTG filled by an AutoFill Keyword Set, the AutoFill Keyword Set may unexpectedly re-populate secondary Keyword Values once the Document Type is changed. For more information, see Considerations for Re-Indexing Documents and Adding or Modifying Keyword Values on page 219.

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

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

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

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

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

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

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

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

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

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

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

Keywords with Drop-Down Lists

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

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

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

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

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

Re-Indexing Document Revisions

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

The revision process is the same as Re-Indexing Documents on page 215, only you would access documents from the Document Results Search List using the Revisions/Rendition option from the right-click menu. When the **Revisions/Renditions** dialog box is displayed, select the oldest revision and re-index as needed. All the options available during a regular re-indexing are available when re-indexing a revision, including the ability to change the file type.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

- **Notes and Annotations**

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

Folders

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.

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.

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.
- 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.

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.

Opening File Cabinets and Folders

File cabinets contain folders, which contain documents that are placed in the folder from the OnBase Client interface, or that are automatically pulled into the folder according to Keyword Type Values (dynamic folders).

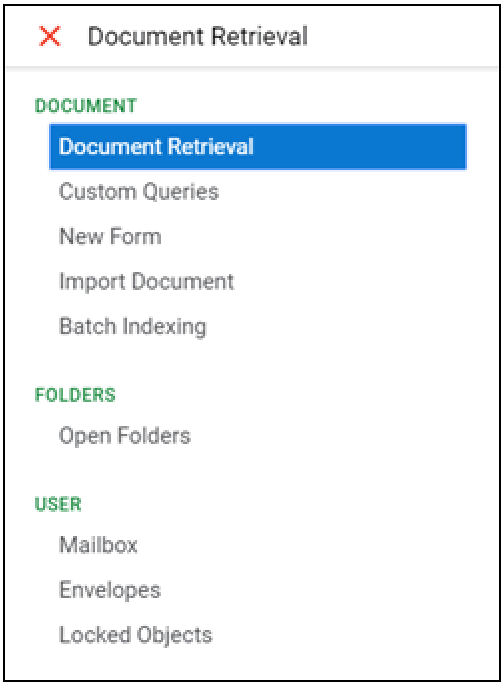
In the Web Client you can view documents in folders, and in some cases, you can delete documents in folders. Folders are accessed in the Web Client from the Context drop-down list.

Your system administrator configures the file cabinets and Folder Types which folders are based on. You may not have access to file cabinets and folders, depending on your system's configuration. You must have appropriate rights to view, modify, add documents to, or remove documents from folders.

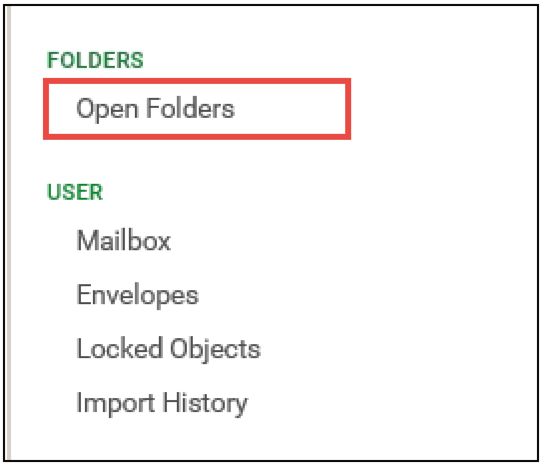
Opening the Folders Window

To access folders from the Web Client:

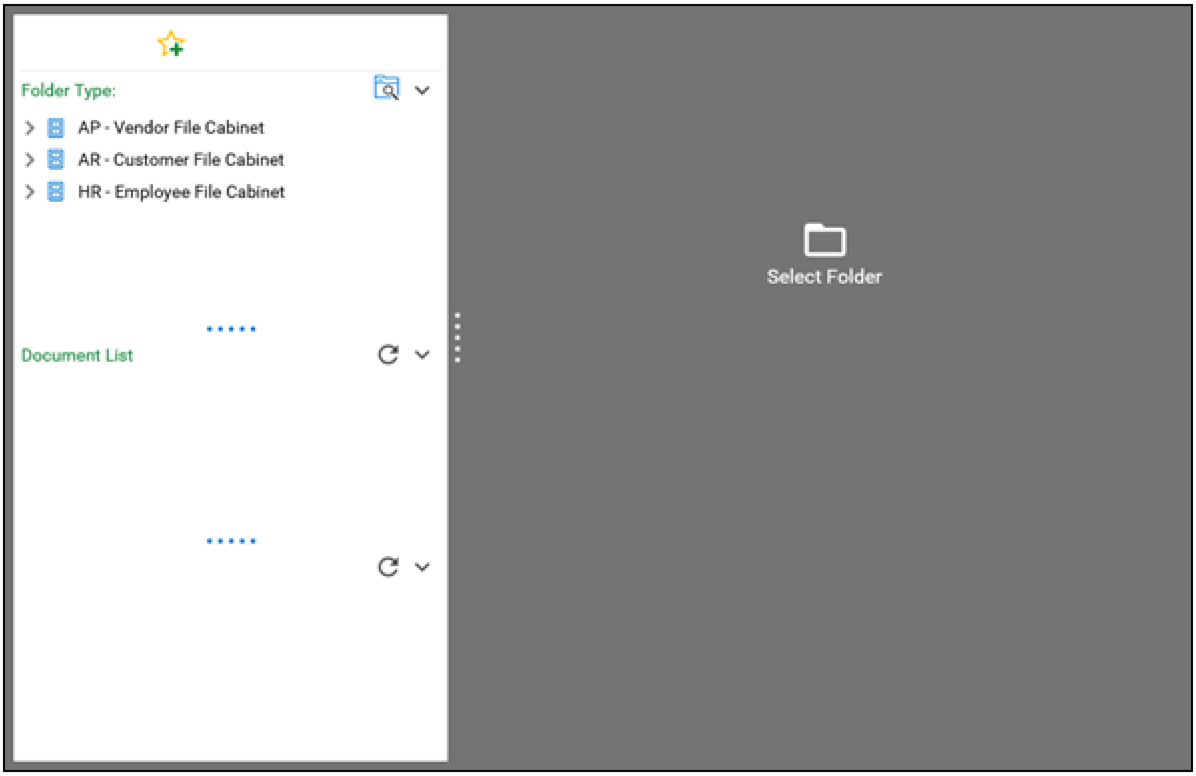
1. Select the Main Menu button. The Menu list is displayed.



2. Scroll down to the **Folders** section, and then select **Open Folders**.

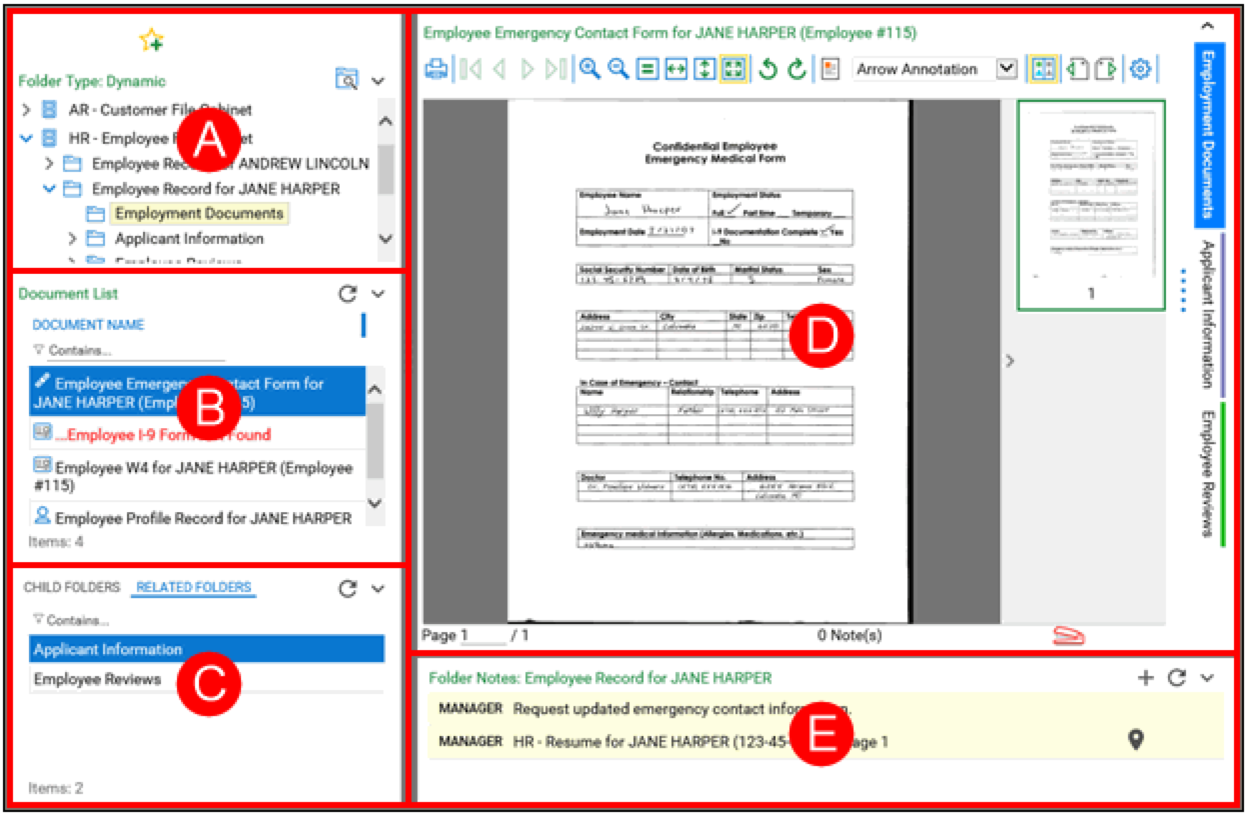


The **Folders** window opens in a separate window.



Tip: Open multiple **Folders** windows by repeating this step. Doing so allows you to compare documents residing in different folders.

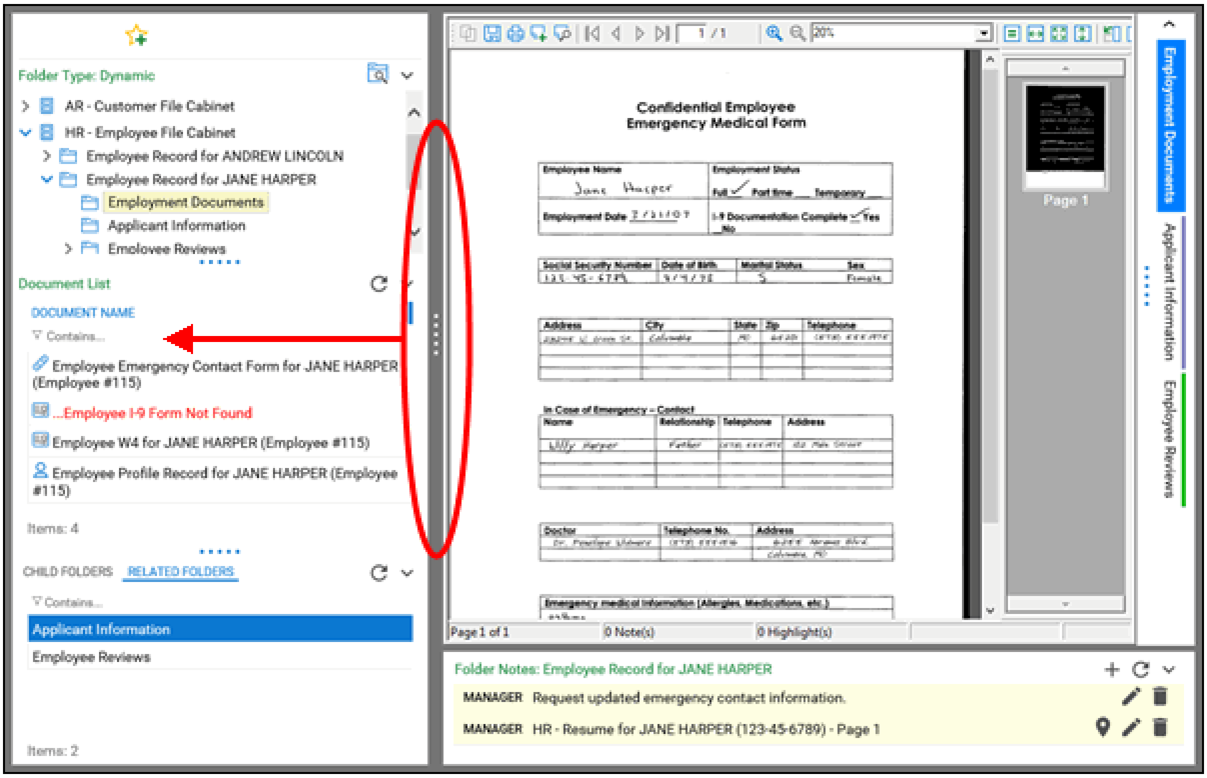
The **Folders** window displays all available file cabinets and folders. The following diagram highlights the main sections of the **Folders** window.



Section	Description
A	Folder Tree: Displays folder hierarchy. Also allows you to add the Folders window to your Favorites or perform a folder search.
B	Document List: Lists all documents in the selected folder, unless a template is applied.
C	Child Folders/Related Folders: Displays child folders (subfolders) and related folders of the selected folder.
D	Document Viewer: Displays the selected document and folder tabs, if configured.
E	Folder Notes: Lists all folder notes in the current branch of the folder tree, if the branch is configured to allow notes.

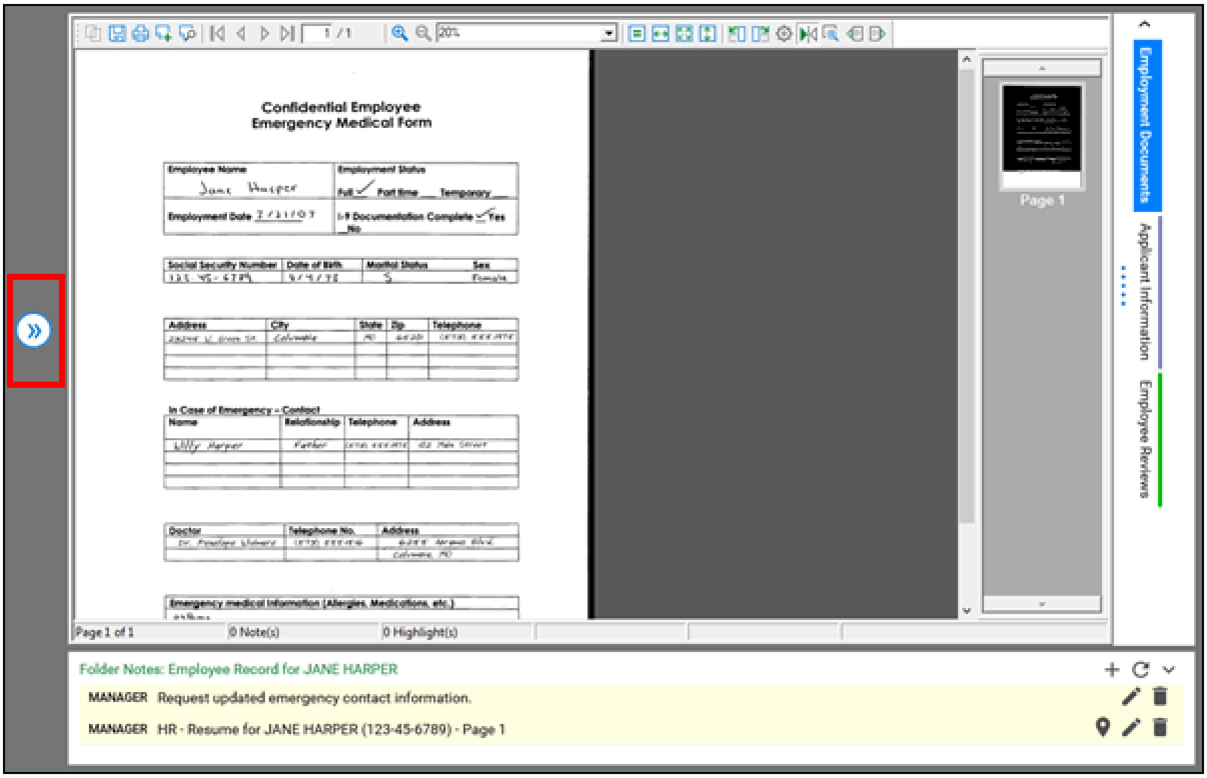
You can resize panes in the **Folders** window by dragging the borders between the panes. To collapse or expand a pane, click the arrow in the upper-right corner of the pane.

You can also collapse the Navigation Panel in the **Folders** window by either double-clicking the vertical handle or dragging the handle until the Navigation Panel collapses.



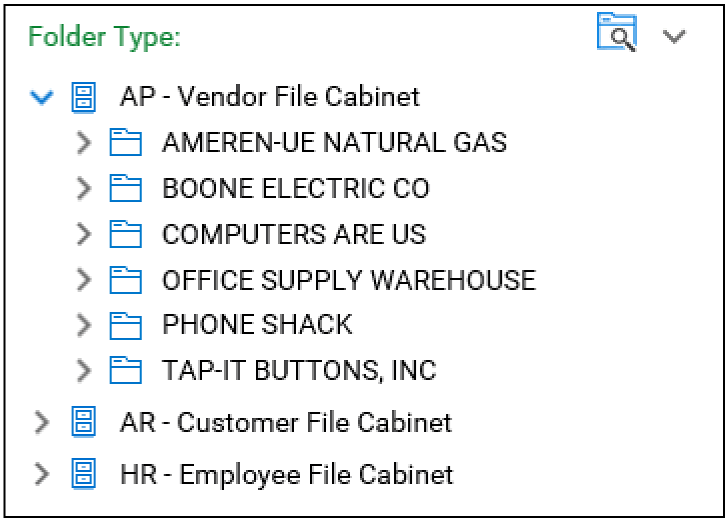
Click the expand button to re-open the collapsed Navigation Panel. The width of the re-opened Navigation Panel depends on how you previously collapsed it:

- If you double-clicked the handle, the panel re-opens at its previously configured width.
- If you dragged the handle until the panel closed, the panel returns to its default width.



Opening a Folder

1. To view the contents of file cabinets and folders, click the arrow to the left of the file cabinet or folder.
2. Folders are displayed in the Folder Tree.



3. Select a folder to display its contents.
   - The **Child Folders** pane lists all child folders of the selected folder.
   - The **Related Folders** pane lists all related folders of the selected folder.
   - The **Document List** 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.

Tip: To refresh a folder pane's contents, right-click within the pane select **Refresh**.

A pop-up list or search dialog box may be displayed, prompting you to specify the child folder to open. This behavior varies depending on the folder's configuration. See the following topics for more information:

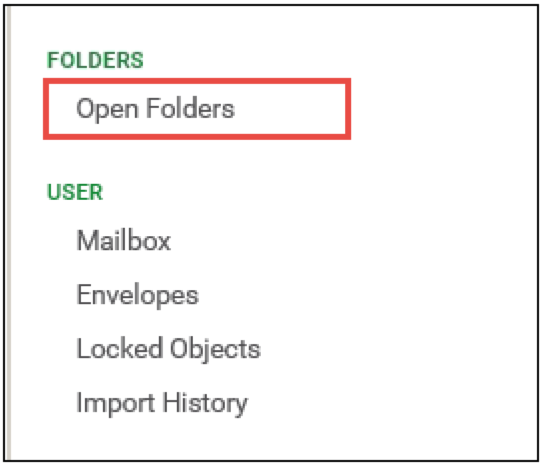
- Accessing Folder Search by Clicking a Folder on page 232
- Working with Folder Pop-up Lists on page 232

Note: Depending on the Folder Type configuration, the **Document List** 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** or **Related Folders** pane, use one of the following methods:
   - Double-click on the folder.
   - Select the folder, right-click and select **View Selected**.
   - If child folders are displayed as tabs (in the right pane), click the tab to open the folder.
5. To open a document, select the document from the **Document List** pane.

Opening Multiple Folders Windows

You can open multiple **Folders** windows from the OnBase Web Client. This feature lets you work in multiple folders concurrently and compare different folders side-by-side. To open another **Folders** window, select **Open Folders** from the Main Menu list.



Opening Documents and Folders in New Windows

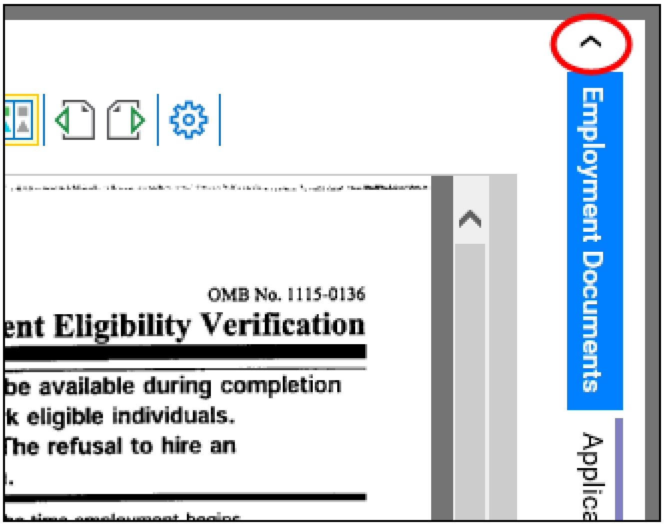
You can open multiple documents or folders in separate windows by using the **Open in New Window** option. This option lets you view multiple documents and folders simultaneously.

- To open a folder in a new window, select the folder and choose **Open in New Window** from the right-click menu.
- To open a document in a new window, select the document from the **Document List** pane and choose **Open in New Window** from the right-click menu.

Moving Up a Level from a Folder Tab

When you select a folder whose child folders are displayed as tabs, the first child folder is automatically opened. As a result, the child folders are never displayed in the **Child Folders** pane, where they need to be displayed for tasks like editing their Keyword Values.

To move up a level and display the child folder in the **Child Folders** pane, click the up-level button available next to the child folder tabs:



This button is available when the current folder is configured to be displayed as a tab.

Clearing a Selected Document or Folder

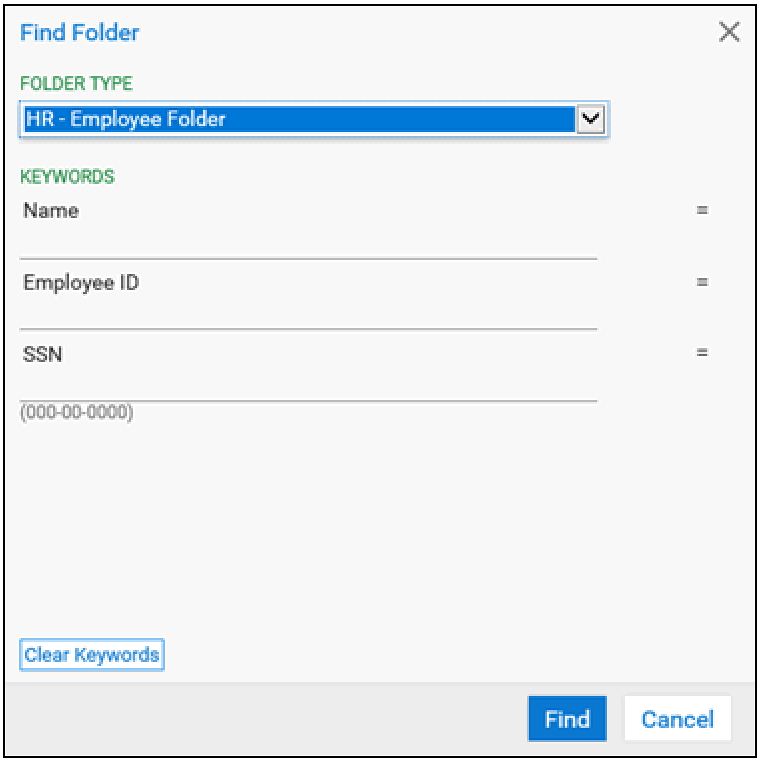
You can clear a selected document or folder using the **Clear Selected** option. For example, if your system is configured to automatically display the first document in a folder, you can use the **Clear Selected** option to clear the document from the viewer.

The **Clear Selected** option is available from the right-click menus in the **Child Folders**, **Related Folders**, and **Document List** panes.

Accessing Folder Search by Clicking a Folder

Some Folder Types are configured to display the **Find Folder** dialog box when a folder of that Folder Type is selected. The **Find Folder** dialog box allows you to search for child folders of the selected folder. Once you retrieve the desired folder, the folder is inserted into the **Folder Tree** pane for that session only.

For more information about folder searching, see Searching for Folders on page 234.



Working with Folder Pop-up Lists

Upon selecting a folder or file cabinet, the **Select Child Folder** dialog box may be displayed. Child folders of the selected folder are listed in this dialog box. You can filter, use right-click options on, and open folders in this list.

1. To find a specific folder, start typing its name in the field above the list.

   For example, to find folders for a customer whose name begins with P, type **P**.

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.

Searching for Folders

You can search for folders using the **Find Folders** dialog box, which is displayed when you initiate a folder search from the **Folders** window or when you open a folder that is set up for child folder searching.

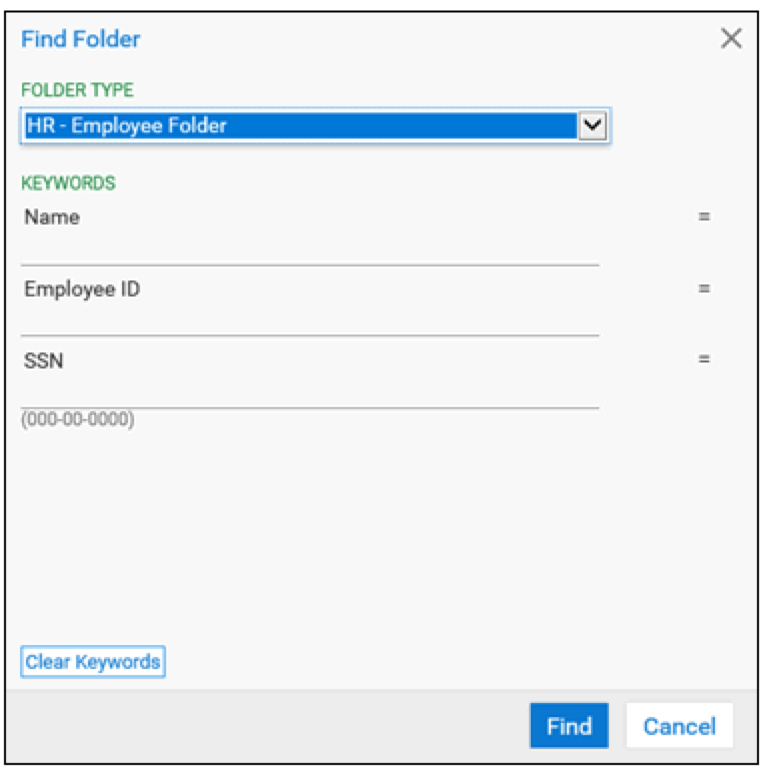
To initiate a folder search:

1. Do one of the following:
   - Right-click in the **Folder Tree**, the **Child Folders** pane, or the **Related Folders pane** and select **Find Folder**.
   - Click the **Find Folder** button.

   - Press **Ctrl + F** when the focus is on the **Folder Tree**.

Note: These options are unavailable if you accessed the **Folders** window from a portlet.

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



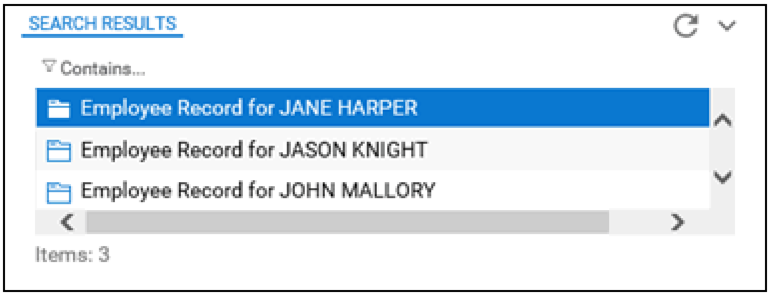
2. From the **Folder Type** drop-down list, select a Folder Type. The **Find Folder** dialog box displays any Keyword Types assigned to the selected Folder Type.

3. Enter Keyword Values as necessary. If a Folder Type requires a Keyword Value to be provided (not left blank) the required Keyword Type is displayed in red.

   You can use all functionality of Keyword Values in the folder search, including adding additional instances of a Keyword Type or Keyword Type Group, or using Wildcard or Boolean operators to narrow the search. For more information, see the related Help topics.

Note: If the Folder Type has one or more Keyword Types, then at least one valid Keyword Value must be entered. You cannot retrieve folders by entering only space characters or asterisks (*).

4. Click **Find** to find all folders matching the criteria.
   - All matching folders you have rights to view, regardless of associated file cabinet, are displayed in the **Search Results** pane. This pane replaces the pane containing the **Child Folders/Related Folders** pane.



   - If only one folder matches the search criteria, it is opened automatically.

Note: A folder search may return the same folder multiple times if the folder is indexed with multiple instances of a Keyword Type Group and each instance contains the same value for the Keyword Type you searched on.

5. Double-click a folder to display its documents in the **Document List** pane.

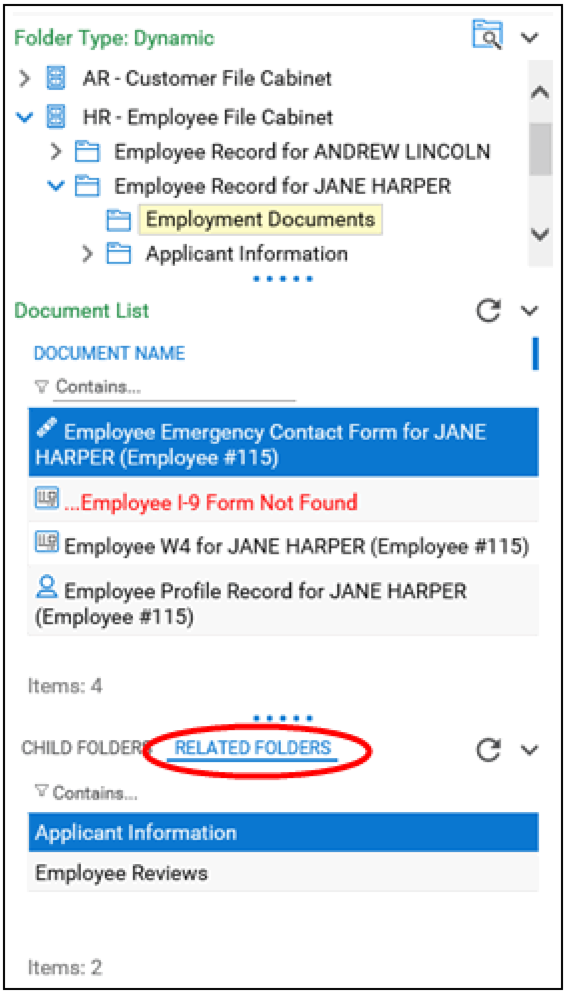
   Depending on the Folder Type, the first document may be displayed in the Document Viewer.

Tip: When you perform a folder search, your search parameters are saved and added to the bottom of the Folder Tree. Click a search to run it again. Past searches remain available until the File Cabinets window is closed.

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.

1. Select a folder in the **Folder Tree** or **Child Folders** pane.
2. Any related folders are listed in the **Related Folders** pane.



Applying a Folder Template

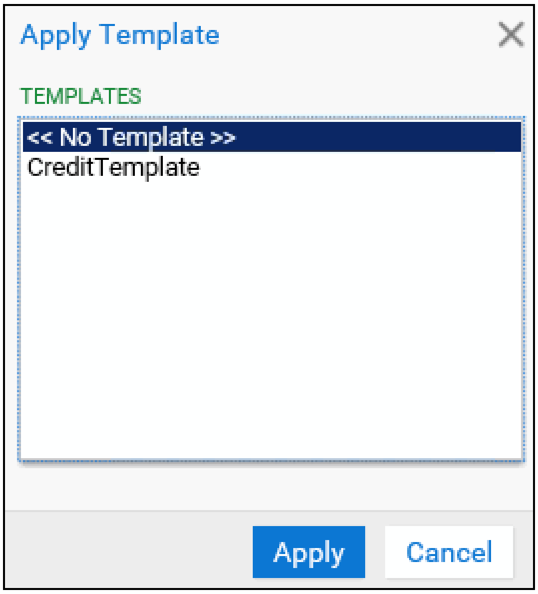
Folder templates help you navigate a folder's contents by doing the following:

- 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.

To apply or remove a template:

1. Right-click anywhere within the **Document List** 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 **Document List** pane displays any applicable documents or information. When a template is applied, the pane's heading changes to **Template**.

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.

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.

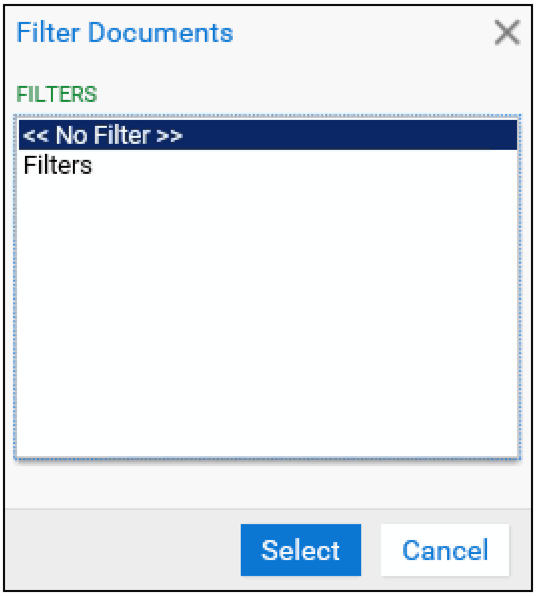
A folder template and a folder filter cannot be applied to a folder simultaneously. If you apply a filter to a folder with a template applied, the template is removed before the filter is applied. If you apply a template to a folder with a filter applied, the filter is removed before the template is applied.

Some folders may have a default filter applied when the folder is opened. When a filter is applied, the **Document List** pane is divided into columns with headers at the top of the pane. To determine which filter is applied, right-click within the **Document List** 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.

If a folder filter is applied but no matching results are found, right-click within the **Document List** pane to remove the filter or apply a different filter.

To apply a folder filter:

1. Right-click within the **Document List** pane and select **Filter Documents**.
   The **Filter Documents** dialog box is displayed.



2. Select a filter.
3. Click **Select**.
4. If a form is displayed in a separate window, type the Keyword Values to filter the folder by, and submit the form.
5. 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 documents are added to and removed from folders.

- Adding Documents to Dynamic Folders on page 240
- Adding Documents to Static Folders on page 240
- Copying or Moving Documents to Folders on page 242
- Removing Documents from Folders on page 243

Adding Documents to Dynamic Folders

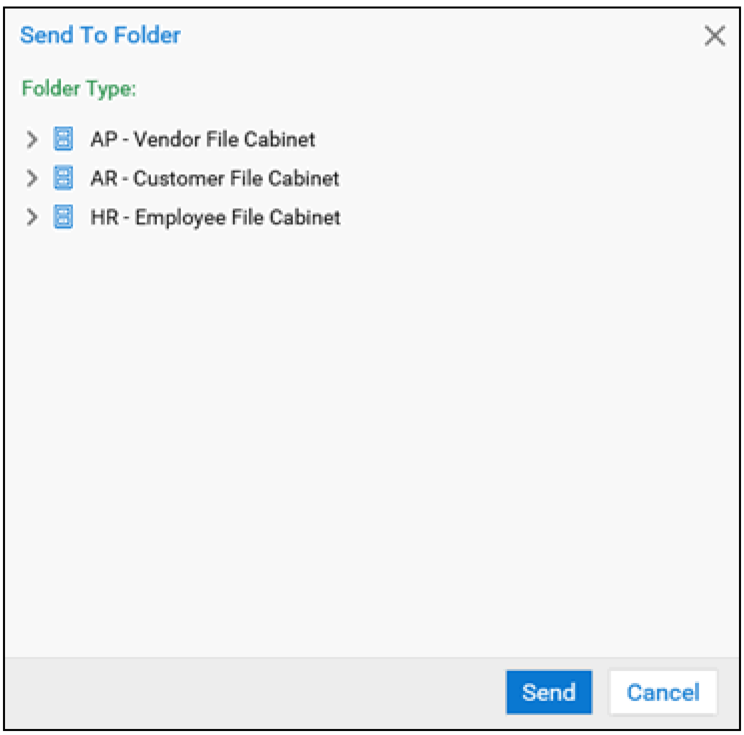
A dynamic folder contains Document Type and Keyword Value criteria that OnBase will use to find documents.

When you open a dynamic folder, documents that match the criteria populate the folder automatically. Each time the folder is opened, the query will be run again, finding any new documents that match the criteria for the folder.

Adding Documents to Static Folders

If you have sufficient privileges, you can add documents residing in OnBase to static folders. A single document can reside in multiple folders because folders contain pointers to documents rather than actual copies.

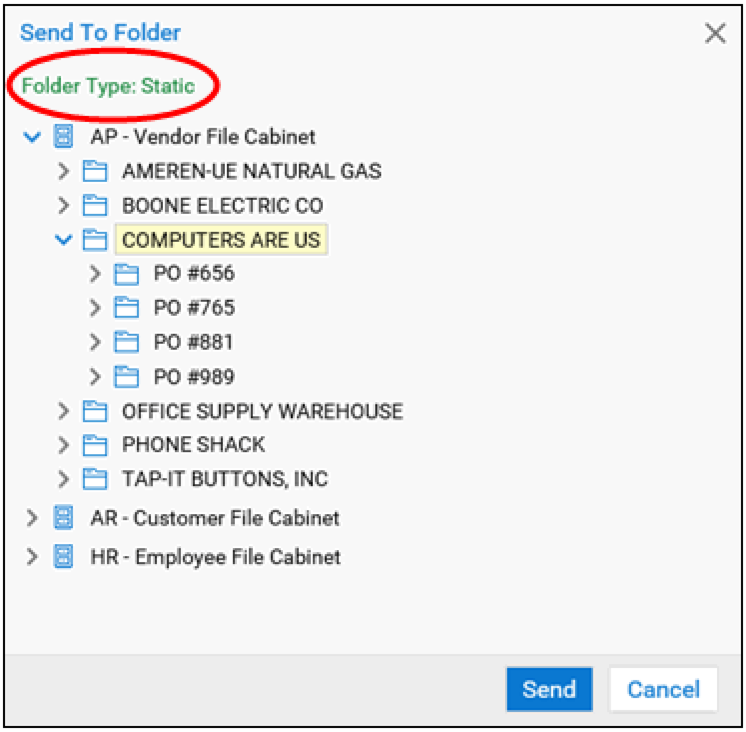
1. Select one or more documents from a Document Search Results list.
2. Right-click the document(s) and select **Send To | Folder**. The **Send To Folder** dialog box is displayed.



3. Select the folder where you want to add the document(s).

   Depending on your system configuration, you may be prompted to search a Folder Type upon selecting it. For more information on searching folders, see Searching for Folders on page 234.

4. Ensure the **Folder Type** bar above the folder tree says **Static** or **Static/Dynamic** for the selected folder. Documents cannot be manually added to a dynamic folder.



5. Click **Send** to add the document(s) to the folder.

   If OnBase won't let you add the document to a folder, see the following section, If You Cannot Add a Document to a Folder.

If You Cannot Add a Document to a Folder

You may be unable to add a document to a folder under any of the following conditions:

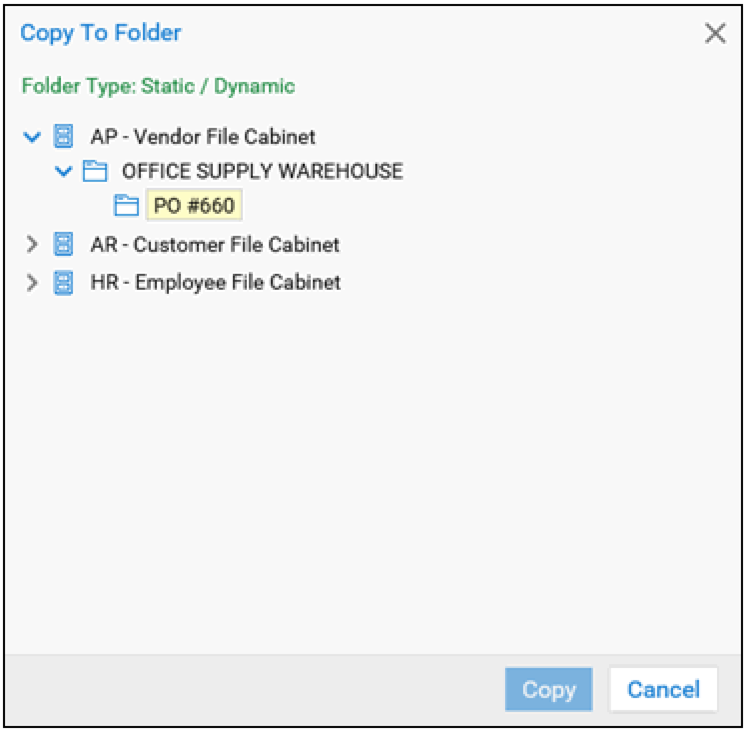
- You have insufficient privileges to add documents to the folder.
- The folder's Folder Type is dynamic. Dynamic folders are populated automatically based on document Keyword values. Documents cannot be added to dynamic folders manually unless the folder is both static and dynamic.
- The folder's Folder Type is set up to only contain other folders.
- The document already resides in the folder. A document cannot be added twice to the same folder.
- The folder is locked by another OnBase user, process, or module. For example, if a user is modifying the folder's Keyword Values in the OnBase Client, then you cannot add a document to the folder.

Copying or Moving Documents to Folders

If you have sufficient privileges, you can organize folder contents by moving and copying documents to static folders.

1. Open the folder containing the document you want to move or copy.
2. Select the document you want to move or copy from the **Document List** pane. To select multiple documents, press **Ctrl** as you select each one.
3. Right-click and select one of the following options:
   - Select **Copy To Folder** to copy a document from its current folder to another. Each folder then contains a link to a single copy of the document. If the document is modified in one location, the changes are reflected in both locations.
   - Select **Move To Folder** to remove the document from its current folder and add it to another. This option is unavailable if the folder is dynamic or if you have insufficient privileges to remove the document from its current folder.

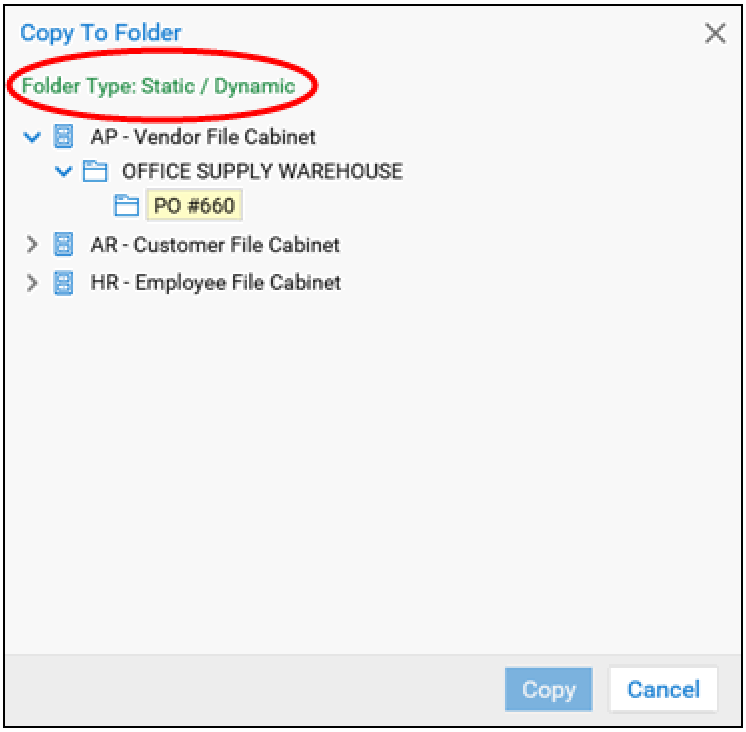
   Depending on your selection, the **Copy To Folder** or **Move To Folder** dialog box is displayed.



4. Select the folder where you want to add the document(s).

   Depending on your system configuration, you may be prompted to search a Folder Type upon selecting it. For more information on searching folders, see Searching for Folders on page 234.

5. Ensure the **Folder Type** bar above the folder tree says **Static** or **Static/Dynamic**. Documents cannot be manually added to a dynamic folder.



6. Click **OK**.

   If OnBase won't let you add a document to the folder, see If You Cannot Add a Document to a Folder on page 241.

Removing Documents from Folders

If you have sufficient rights, you can remove documents from static folders. Select the document from the **Document List** pane, right-click, and select **Remove From Folder**.

Note: 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 document is removed from a folder, it will not be removed from OnBase, just that folder.

You cannot manually remove documents from a folder that is dynamic. Dynamic folders automatically pull in documents based upon Keyword Value criteria.

Adding and Deleting Folders

These topics describe how to add and delete folders:

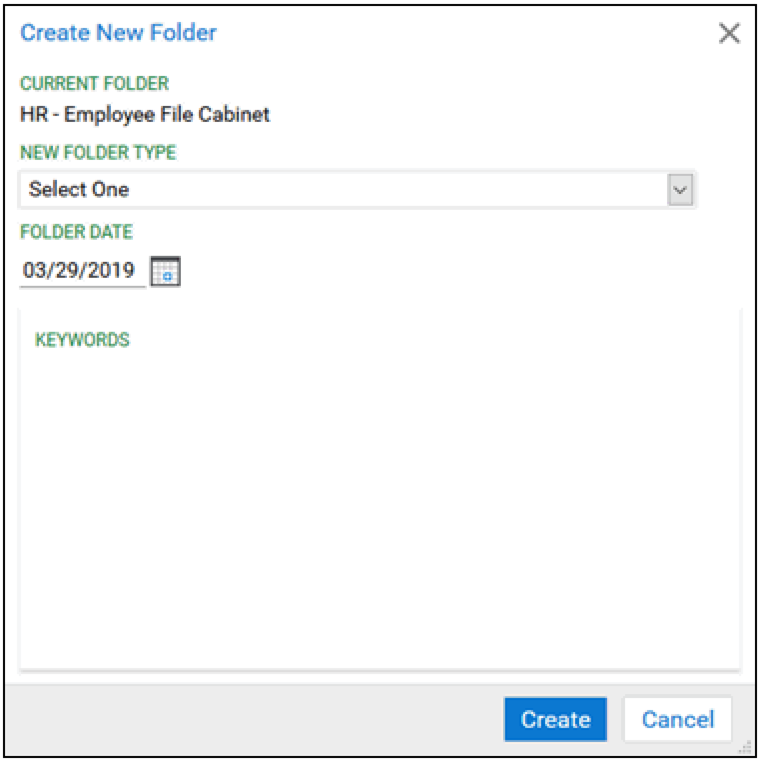
- Adding a Folder on page 244
- Deleting a Folder on page 245

Note: You must have appropriate User Groups and Rights for folders.

Adding a Folder

The following procedure describes how to create a new folder from the **Folders** window.

1. In the **Folder Tree** pane, select the folder (or file cabinet) into which you want to place the new folder.
2. Right-click and select **New Folder**. The **Create New Folder** dialog box is displayed.



3. Select a Folder Type for the new folder. Folder Types define the following folder characteristics:
   - Static or dynamic properties (how documents are filed)
   - Assigned Keyword Types (used for searching and organization)
4. Index the new folder.

- If the folder shares Keyword Types with the selected parent folder, then the folder automatically inherits values for these Keyword Types from the parent folder. You can change these values, if necessary.
- If a Folder Type requires a Keyword Value to be filled in (not left blank) the Required Keyword Type is displayed in red. You must supply a Keyword Value to create and save the new folder.
- If the folder uses a Multi-Instance Keyword Type Group, then the Keyword Type fields are in a collapsed state. Expand them by clicking the symbol to the left of the first Keyword Type name. You can add another instance of the Keyword Type Group by clicking the Keyword Type name or by clicking in a Keyword Type field and pressing **F6**.

5. Change the **Folder Date** if desired.
6. Click **Create** or press the **Enter** key. The new folder is added to the **Child Folders** pane.

Deleting a Folder

You can delete folders by using a right-click option. Deleting a folder does not remove its documents from OnBase. The documents remain available through other Document Retrieval methods.

Your ability to delete a folder depends on your privileges to the folder and the child folders it may contain. If you attempt to delete a folder that contains a child folder, and you do not have privileges to delete that child folder, then you cannot delete the parent folder or the restricted child folder(s). Child folders you have privileges to delete are deleted.

If your solution uses the Records Management module, you cannot delete managed folders or folders that contain managed folders using this method. If you attempt to delete a folder that contains both managed and unmanaged folders, the unmanaged folders you have privileges to delete will be deleted.

Note: Managed folders require a Records Management license.

Note: Deleted folders can only be restored from Folder Maintenance in the OnBase Client by your system administrator.

To delete a folder from the **Folders** window:

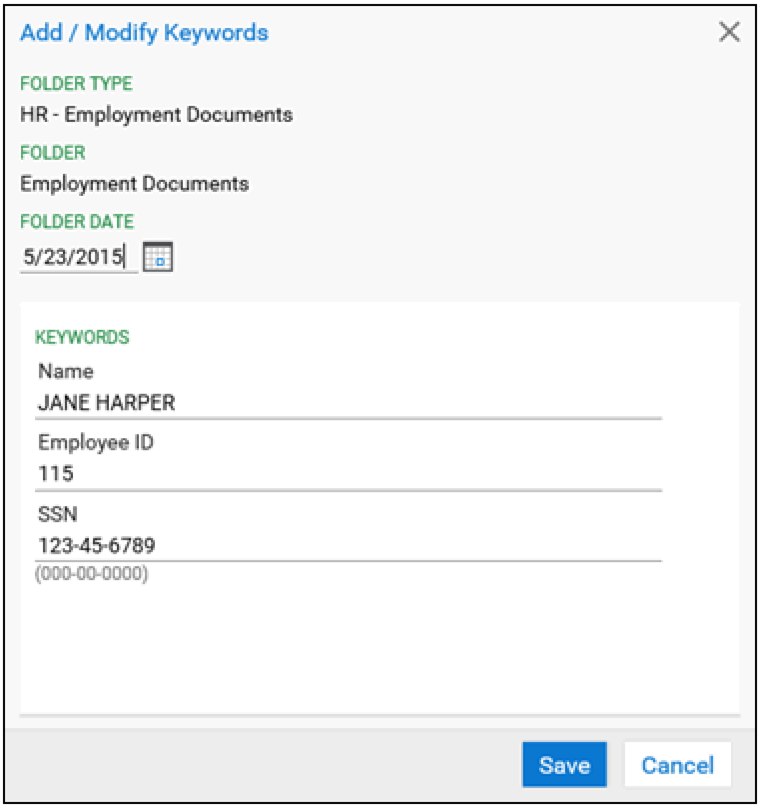
1. From the **Child Folders**, **Related Folders**, or **Folder Tree** pane, select the folder you want to delete.
2. Right-click and select **Delete**.
3. You are prompted to confirm that you want to delete the selected folder and all of its child folders. Click **OK**. The selected folder is removed.

Changing Folder Keyword Values

If you have the appropriate user rights, you can change the Keyword Values assigned to a folder.

Note: Depending on the Folder Type of the folder (Static or Dynamic), changing its Keyword Values may change the contents of the folder, removing existing documents and adding new documents to the folder. Ensure you understand the ramifications of changing Dynamic Folder Type Keyword Values before proceeding. See your system administrator for additional information.

1. From the **Folder Tree**, **Child Folders** pane, or the **Related Folders** pane, select the folder.
2. Right-click and select **Keywords**.
3. The **Add/Modify Keywords** dialog box displays the Keyword Types and values for the selected folder along with the Folder Type name, the folder Auto-Name (based upon the Keyword Values) and the **Folder Date**, which by default is the folder creation date.



Note the following:

- 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.

- 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 first Keyword Type name. You can add another instance of the Keyword Type Group by clicking the Keyword Type name or by clicking in a Keyword Type field and pressing **F6**.

4. Edit the Keyword Values.
5. When finished, click **Save Keywords**. The Keyword Values are changed.

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 249.

Note: As a best practice, use the **Folder Contents | Keywords** options only when the folder and its contents use the same Keyword Types.

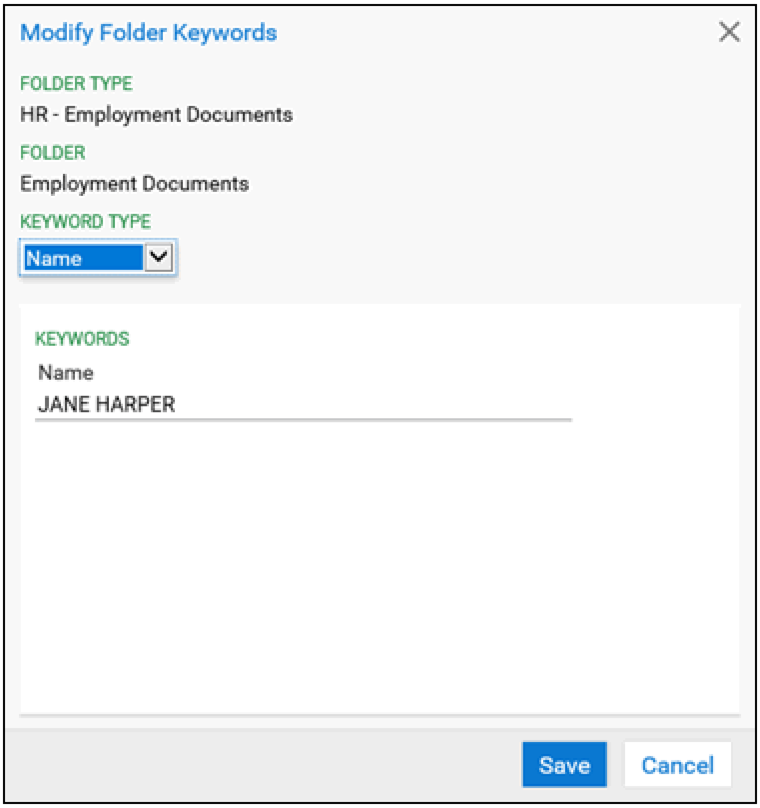
If you have insufficient privileges to modify Keyword Values on all of a folder’s contents, values are modified only on child folders or documents you have privileges to modify. If you lack rights to modify Keyword Values on a folder, then no values are modified on the folder’s contents.

To modify Keyword Values on a folder and its contents,

1. From the **Folders** 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:



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 249.

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.

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 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.

Before you begin, read the following topic, Folder Notes Requirements. Then, proceed to the following topics:

- Viewing and Sorting Folder Notes and Bookmarks on page 252
- Adding a Folder Note or Bookmark on page 253
- Viewing a Bookmarked Document on page 255
- Editing an Existing Note or Bookmark on page 255
- Deleting a Note or Bookmark on page 256

Folder Notes Requirements

Not all folders allow notes. To allow notes, a folder must either:

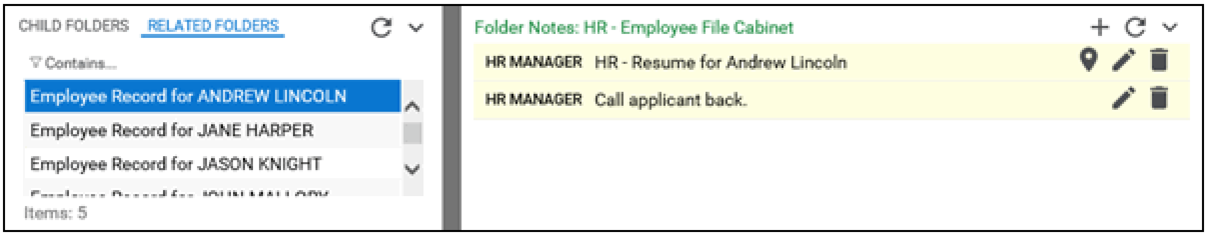
- Be based on a Folder Type configured as a parent for folder notes. These parent folders define the branch of the folder tree where notes are allowed.
- Reside within a parent folder for folder notes.

To work with folder notes, you must have sufficient privileges. If you do not have Folder Note Type privileges, then you cannot create, view, edit, or remove folder notes.

Viewing and Sorting Folder Notes and Bookmarks

The following section describes how to view notes and bookmarks on folders within the current branch of the folder tree. If folder notes are unavailable from the folder you are viewing, ensure the Folder Notes Requirements on page 252 are met.

To view folder notes or bookmarks, open the appropriate folder. Notes are displayed in the **Folder Notes** pane.



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.

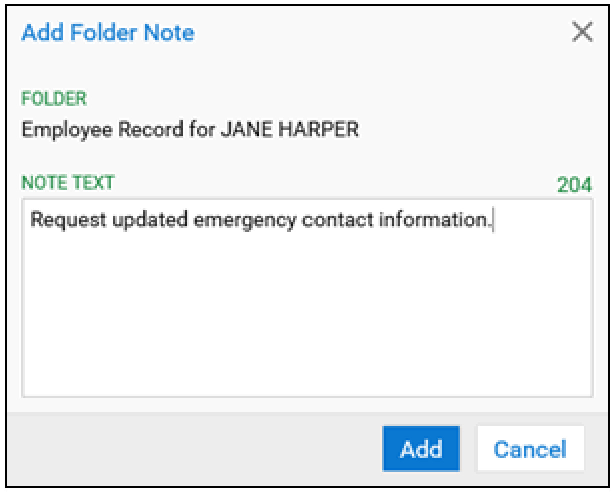
Adding a Folder Note or Bookmark

The following steps describe how to add a note or bookmark to the folder you are currently viewing. Notes allow you to comment on folder contents; bookmarks allow you to quickly jump to a specific page on a specific document in the folder tree.

1. Navigate to the folder you want to add the note to.
2. If you are adding a bookmark, navigate to the document and page that you want to bookmark.
3. From the **Folder Notes** pane, click the **Add Folder Note** button.

4. Select the type of note you want to add. If you are bookmarking a document, select a Note Type that has been configured for bookmarking.

   The **Add Folder Note** dialog box is displayed.

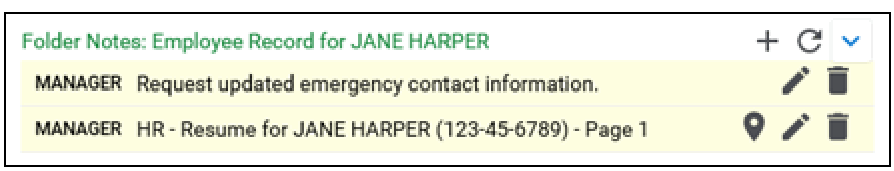


5. Type the note text in the field provided.

   When adding a bookmark, the Auto-Name string of the bookmarked document and the page number on which you are placing the bookmark are displayed in the field by default. This text can be removed or edited as needed.

Note: If you go over 250 characters, the character counter displays the number of excessive characters as a negative number. Also, if you attempt to save the folder note, a message is displayed indicating that you are over the character limit and the folder note cannot be saved.

6. Click **Add**. The new note is added to the top of the **Folder Notes** pane.



Viewing a Bookmarked Document

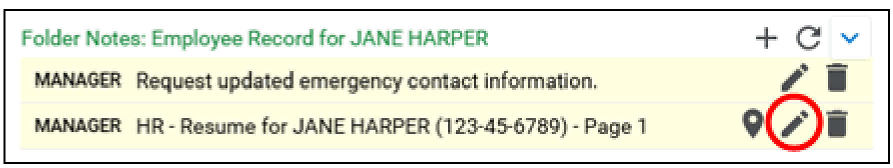
To quickly retrieve a bookmarked document, click the **Go To Page** button from the bookmark in the **Folder Notes** pane. This button is available only on bookmarks; it is not available on standard folder notes.

Note: If clicking the bookmark does not yield a document, the document may have been removed from the folder or deleted from OnBase. You may also lack privileges to the document.

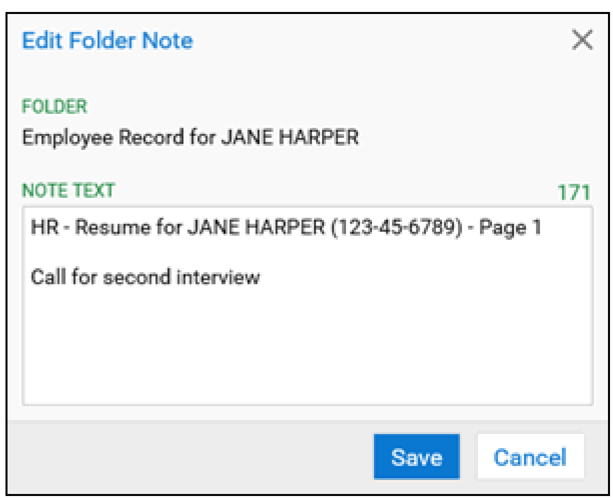
Editing an Existing Note or Bookmark

To edit a folder note:

1. Click the **Edit** button for the note listed in the **Folders Notes** pane.



The **Edit Folder Note** dialog box is displayed.



2. Edit the text as needed, and then click **Save**.

Note: If the note does not have an **Edit** button, then you lack sufficient privileges to edit the note.

Deleting a Note or Bookmark

To delete a folder note, click the **Delete** button for the note listed in the **Folders Notes** pane.

Click **Yes** when prompted.

Note: If the note does not have a **Delete** button, then you lack sufficient privileges to delete the note.

Emailing FolderPop Links

If you have the appropriate user privileges, you can email a link to a folder that can be accessed by recipients via FolderPop. Select a folder in the folder tree pane, right-click the folder, and select **Send To | Create FolderPop Link**.

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

Printing Folder Contents

The OnBase Web 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. Select the folder you want to print in the **Folder Tree**, the **Child Folders** pane, the **Related Folders** pane, or in a pop-up list.
2. Right-click the folder and select **Print**. The **Print** dialog box is displayed.
3. Adjust the print options as needed. Available options may vary depending on your system's setup. For a description of OnBase printing options, see Printing Documents on page 378.
4. Click **OK**. All documents in the folder and its child folders are printed.

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.

Sending and Receiving Mail

If you have appropriate privileges, you can send internal mail to communicate with other OnBase users and to send them OnBase documents. You can read messages from other users from your OnBase inbox. If you need to send documents to non-OnBase users, you can email OnBase documents externally to an email address.

- To send documents to another OnBase user, see Send To | Internal User on page 257.
- To check your OnBase inbox, see Checking Internal Mail on page 260.
- To email documents externally, see Emailing Documents on page 264.

Send To | Internal User

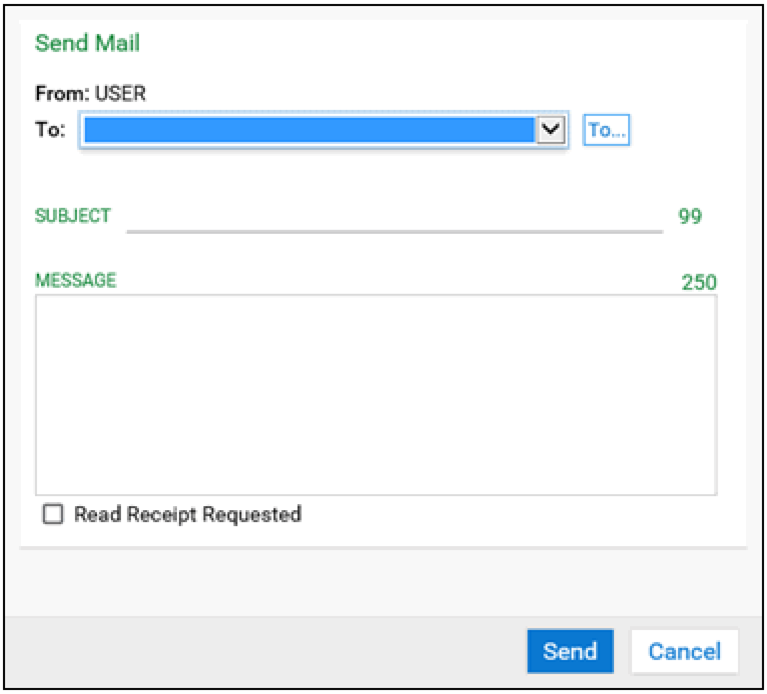
Internal Mail lets you send documents and messages to other OnBase users.

- To send a document and a message to another OnBase user, see Sending OnBase Documents to Other OnBase Users on page 258.
- To send only a message to another OnBase user, see Sending Messages to Other OnBase Users on page 259
- To view messages and documents from other OnBase users, see Checking Internal Mail on page 260.

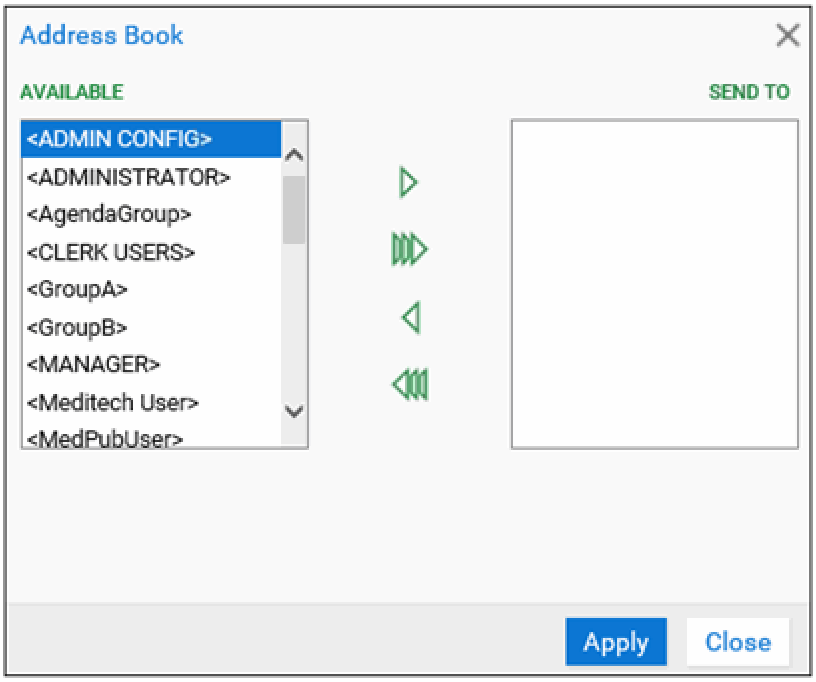
Note: To access Internal Mail, you must have the Internal Mail privilege assigned to you.

Sending OnBase Documents to Other OnBase Users

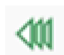
1. From the Document Search Results list or an open document, right-click on the selected document(s) and select **Send To | Internal User**. The **Send Mail** dialog box is displayed:



2. Click the **To** button and select any Internal User(s) from the Address Book.



3. The following options allow you to add and remove users from the Send To list:

Option	Description
	Click the **Add** button to add selected users into the **Send To** list.
	Click the **Add All** button to add all users to the **Send To** list.
	Click the **Remove** button to remove selected users from the **Send To** list.
	Click the **Remove All** button to remove all users from the **Send To** list.

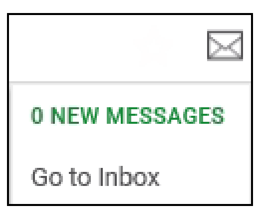
4. Click Apply. You are returned to the **Send Mail** dialog box.
5. Enter a **Subject**. You can enter up to 99 characters.
6. Select the **Read Receipt Requested** check box to request a read receipt.
7. Enter a message of up to 250 characters.

Note: Each space is treated as a single character, and each new line counts as two characters. When replying and forwarding, the right angle brackets (>) in the message field count as a single character and the **FW:** counts as four characters in the subject field.

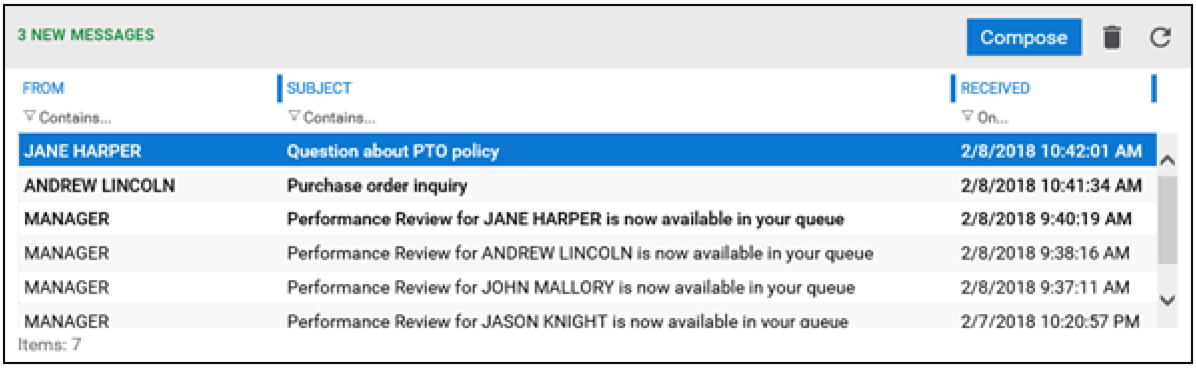
8. Click **Send**.

Sending Messages to Other OnBase Users

1. Select the Mail icon, located next to your user name.



2. Select **Go to inbox**. The Mailbox layout is displayed.



3. Click **Compose** to send a new email.

For more information on Sending Internal Mail, see Send To | Internal User on page 257.

Note: You cannot send attachments from this particular dialog box.

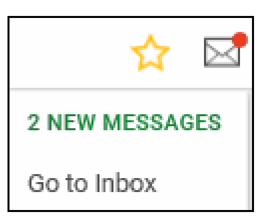
Checking Internal Mail

If you have any internal mail, the Mail icon displays with a red dot, indicating that you have mail in your inbox.

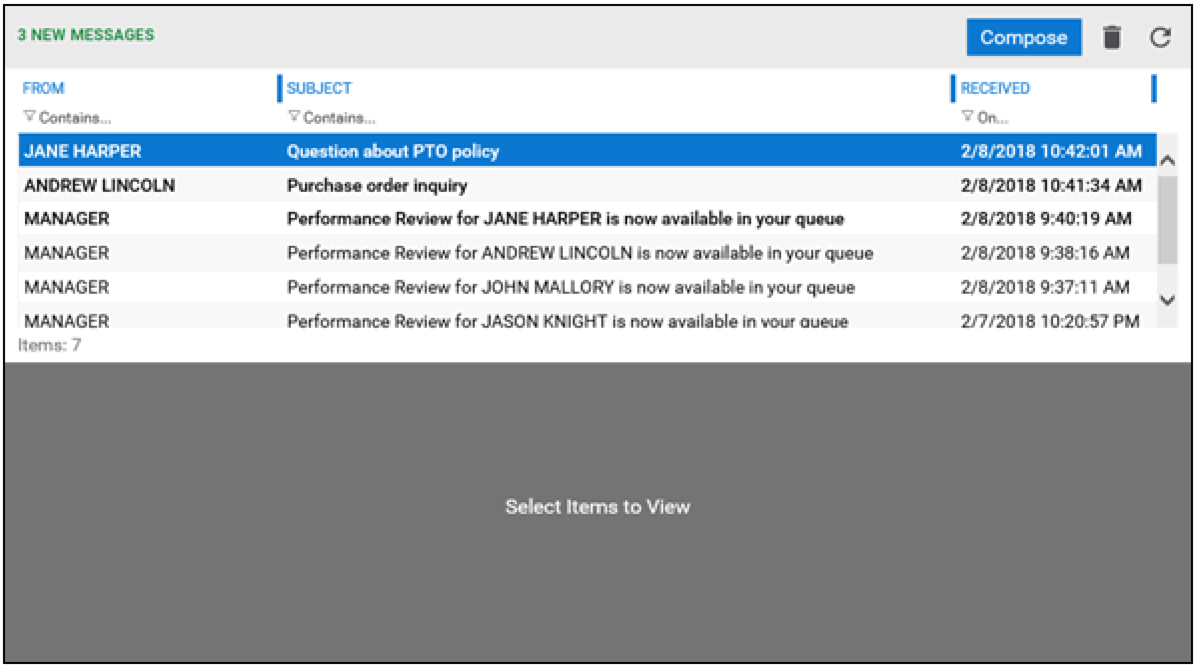
Note: The **Notify on New Mail** option in **Preferences** must be selected in order to display the mail notification icon. See Internal Mail Notification on page 49 for more information.

To access the internal mail:

1. Click the Mail icon. A drop-down list is displayed indicating how many new messages are available for viewing.

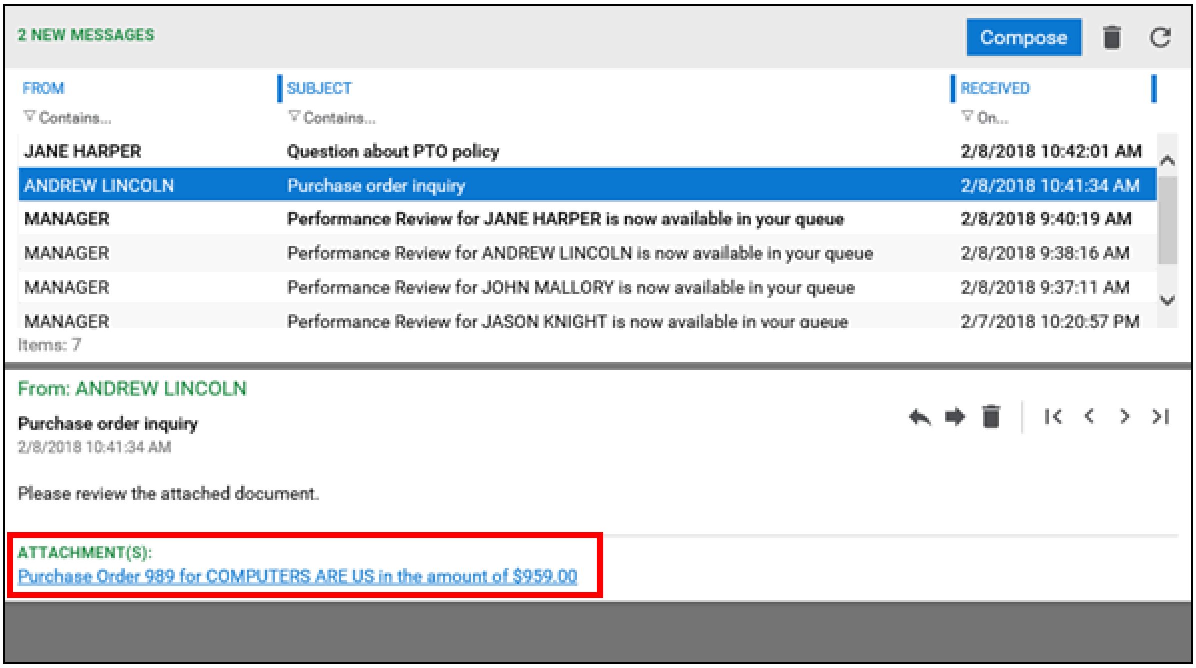


2. Select **Go to Inbox**. The Inbox is displayed showing the new messages and previously received messages.



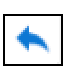
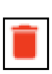
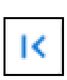
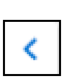
3. To read a message, select it from the Inbox list. The message is displayed in the lower pane.

4. To view an attached document, click the document's link in the **Attachment(s)** section.



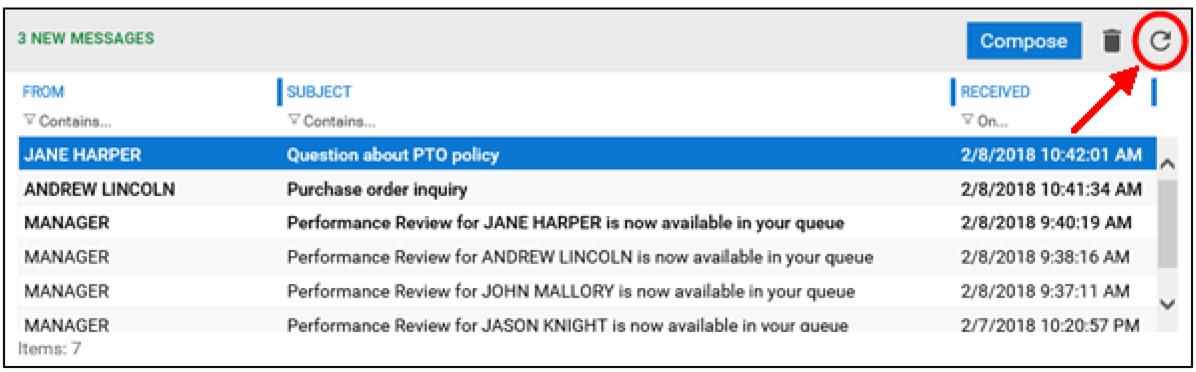
Note: If a user is sent an attachment in internal mail and does not have rights to view the Document Type to which it belongs, the user is unable to open the attachment. If the user does not have rights to modify document Keyword Values, the user does not have the ability to Add/ Modify Keyword Values or Re-Index the attached document.

5. For more options, click one of the buttons described in the following table:

Button	Description
	**Reply** lets you reply to the OnBase user who sent you the message.
	**Forward** lets you forward the message and attachment(s) to other OnBase users.
	**Delete** deletes the message.
	**First Message** displays the message you received most recently.
	**Previous Message** displays the message listed above the message you are currently viewing.

Button	Description
>	**Next Message** displays the message listed below the message you are currently viewing.
>|	**Last Message** displays the oldest message in your inbox.

6. To check for new messages, do one of the following:
   - Click the **Refresh** button.
   - Right-click a message from the list and select **Refresh**.



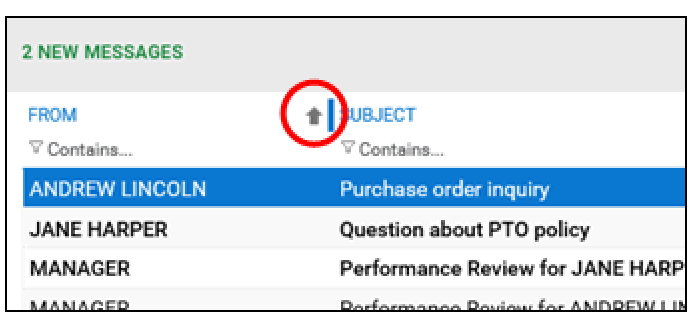
Sorting Mail

Messages in your inbox can be sorted by column. To sort the messages in your inbox:

1. Click the column header for the column you want to sort by.
2. Mail messages are sorted in ascending order based on the column you selected.

   An up arrow in the column header means the list is sorted by that column in ascending order, while a down arrow means it is sorted in descending order.

   In the following example, the list of messages is sorted alphabetically in ascending order.



Deleting Mail

From the inbox, select the message and click the **Delete** button, or right-click on the message and select **Delete Selected**.

Emailing Documents

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

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

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

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

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

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

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

Emailing a Document

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

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

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

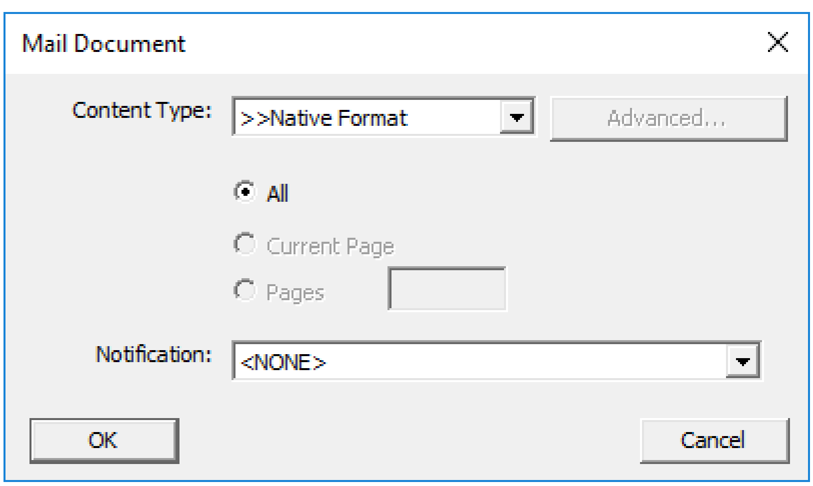
- If your default mail client is IBM Lotus Notes, emails composed in OnBase are auto-saved in the IBM Lotus Notes drafts folder. When emails are discarded in OnBase before being sent, they are not removed from the IBM Lotus Notes drafts folder.
- Email signatures cannot be automatically added for certain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

To email a document in the Web Client:

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

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

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



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

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

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

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

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

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

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

4. Select one of the following page options:

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

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

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

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

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

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

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

Attachment Display Considerations

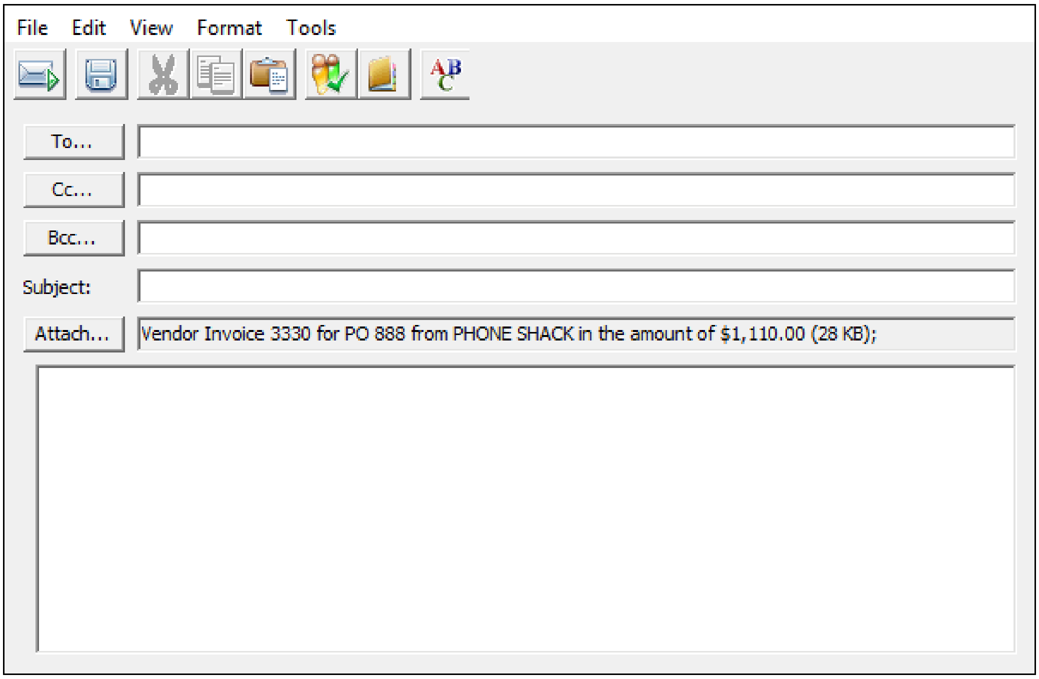
If the document you are sending has an overlay, the overlay is displayed on the attachment only if the overlay is displayed by default when you open the document in OnBase. Overlays are not displayed on attachments sent with a content type of **Native Format**, **Original Format**, or **Text (.txt)**.

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

Using the Mail Message Dialog Box

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

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



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

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

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

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

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

Checking Names and Addresses

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

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

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

Envelopes

Envelopes provide a way to bundle documents together for easy access, or to easily email the group of documents at one time.

Envelopes are similar to folders from a document retrieval perspective. However, there are some key differences:

- Only the user that created an envelope can see its contents.
- Folders are based on Folder Types configured by your system administrator.
- Some Folder Types are designed to automatically pull documents in based upon Keyword Value and Document Type. Documents residing in envelopes require no common characteristics.
- Some Folder Types do not allow users to manually add documents to them, whereas envelopes do.
- A system administrator must configure the file cabinet in order for a user to be able to create folders.
- Not all Folder Types are user-creatable. This is determined by your system administrator. If you have proper privileges, you can create envelopes.
- Some documents automatically create the folder structure as they are imported into OnBase.
- You cannot search for envelopes based upon Keyword Value.

Envelope

You can place any documents you want into an envelope, regardless of whether they have anything in common. When an envelope is opened, it displays a list of documents that have been placed in it.

Envelopes provide you with a way to group documents together for easy access. Only the envelope's creator can view that envelope. Envelopes are an alternate way to retrieve documents; the documents remain accessible through standard document retrieval methods.

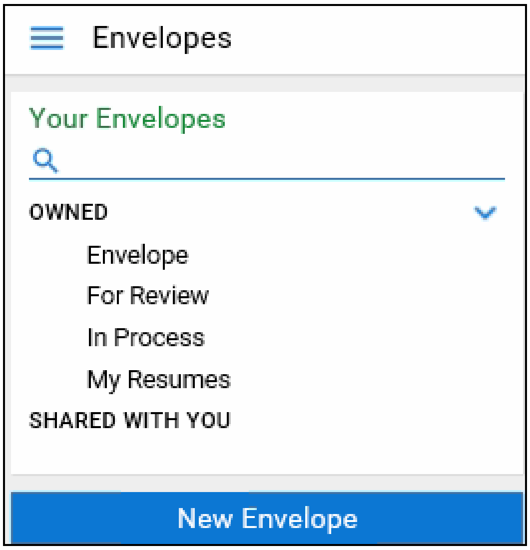
- Because the entry in an envelope is actually a pointer to the document stored in its Document Type Group, removing a document from an envelope will not delete the document from OnBase.
- Adding documents to envelopes does not duplicate the document in OnBase.
- There is no limit to the amount or type of documents that can be placed in one envelope.
- You can add a document to more than one envelope.

Accessing Envelopes

This topic describes how to access the Envelopes panel.

1. Select **Envelopes** from the **User** section of the Main Menu.

The **Envelopes** information is displayed in the Navigation panel. The Envelopes panel lists your available envelopes.



2. Click the name of the envelope to open it.

Working with Envelopes

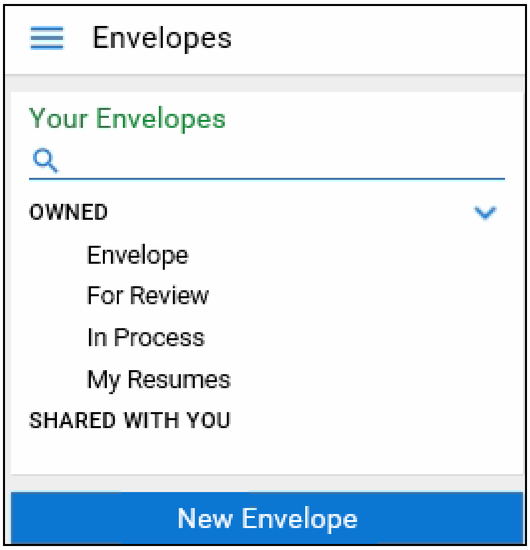
This section describes how to create, delete, rename, and set share permissions on envelopes in the OnBase Web Client. You can also add an envelope to your list of favorites.

Note the following considerations when working with envelopes:

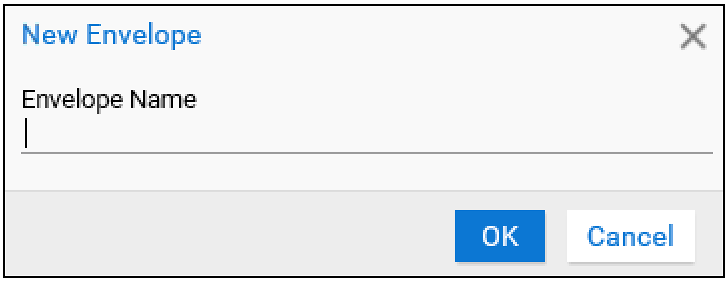
- You must have appropriate privileges to use and share envelopes.
- The only envelopes available to you are the envelopes that you created or the envelopes that other users have shared with you.
- You cannot delete an envelope that is owned by another user. If a user shares an envelope with you, you can delete the shared version of the envelope in your own list of available envelopes, but the owner still retains the original envelope.

Creating a New Envelope

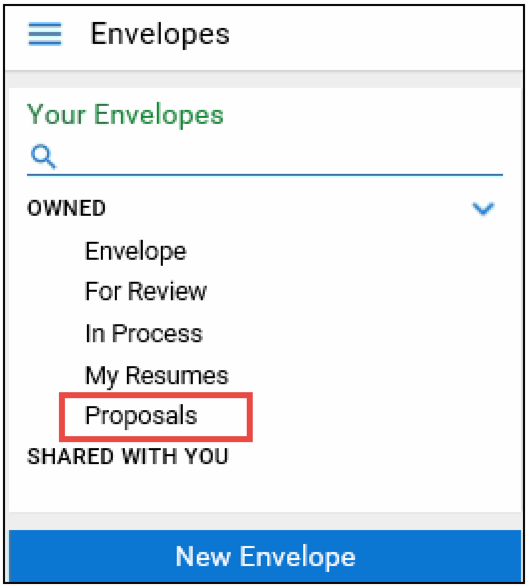
1. Access the Envelopes using the Accessing Envelopes instructions on page 274. The **Envelopes** panel is displayed.



2. Click the **New Envelope** button on the bottom of the panel. The **New Envelope** dialog box is displayed.

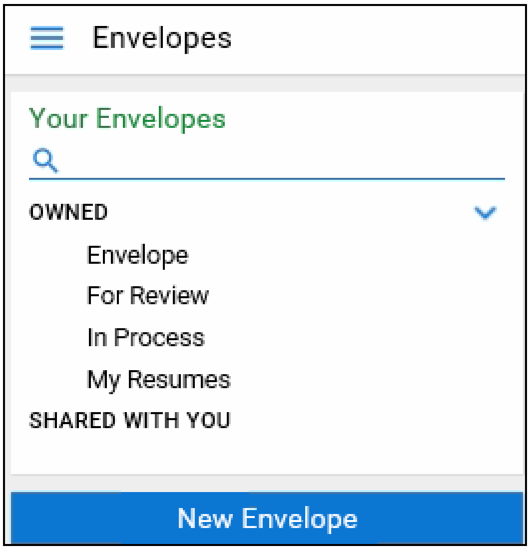


3. In the **Envelope Name** field, type the name for the new envelope.
4. Click **OK**. The system creates the new envelope and lists it in the **Envelopes** panel.

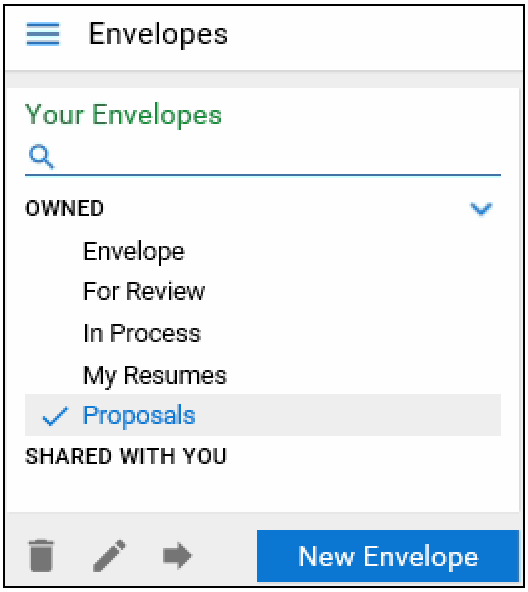


Deleting an Envelope

1. Access the Envelopes using the Accessing Envelopes instructions on page 274. The **Envelopes** panel is displayed.

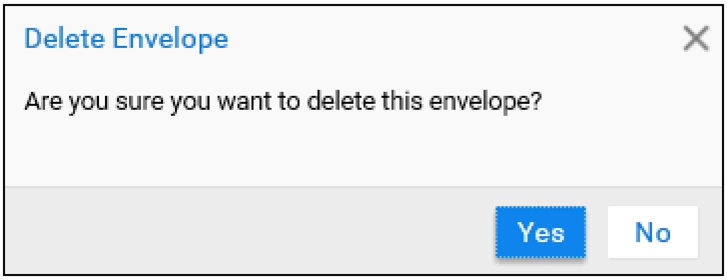


2. Select the envelope you want to delete. A check mark is placed next to the envelope indicating that is has been selected.



3. Click the **Delete Envelope** button.

The **Delete** button turns red, and the **Delete Envelope** message box is displayed.



4. Click **Yes** to delete the selected envelope and to remove it from the **Envelope** panel. Click **No** to cancel the deletion.

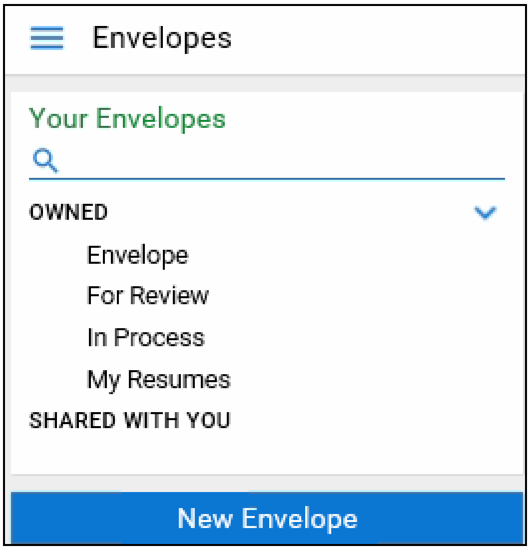
Note: Deleting an envelope does not remove its documents from the system. They will still be available through other document retrieval methods.

Renaming an Envelope

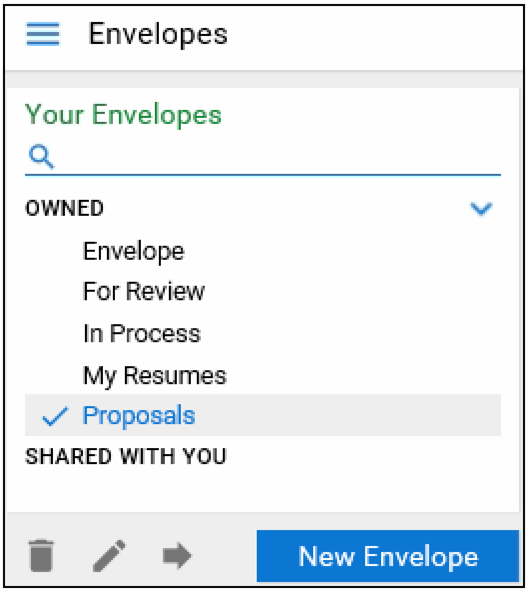
You can rename any envelopes that you have created. If an envelope was shared to you, you cannot rename it.

To rename an envelope:

1. Access the Envelopes using the Accessing Envelopes instructions on page 274. The **Envelopes** panel is displayed.

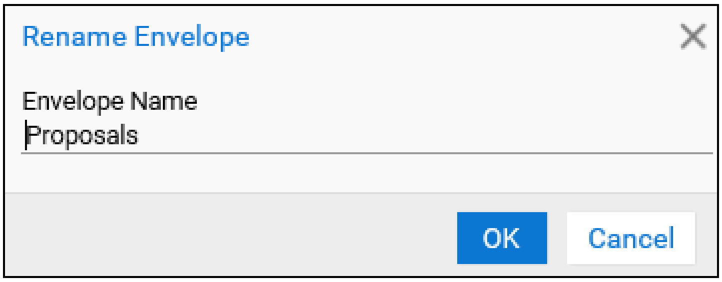


2. Select the envelope you want to rename. A check mark is placed next to the envelope indicating that is has been selected.



3. Click the **Rename Envelope** button.

The **Rename** button turns blue, and the **Rename Envelope** dialog box is displayed.



4. Enter the new name for the envelope, and then click **OK**. The envelope is renamed.

Sharing an Envelope

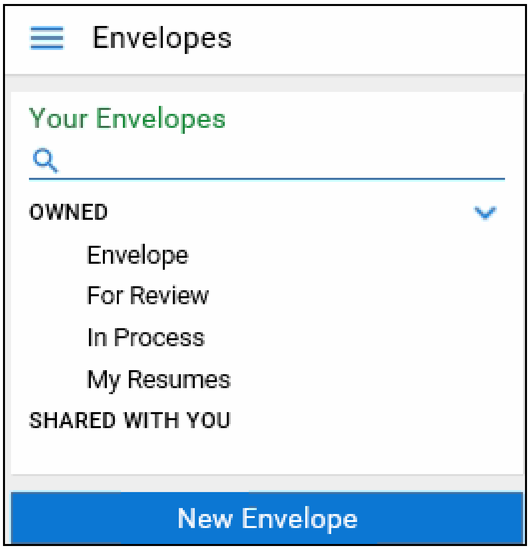
If you have sufficient privileges, you can share envelopes with other OnBase users.

Note the following considerations when sharing envelopes:

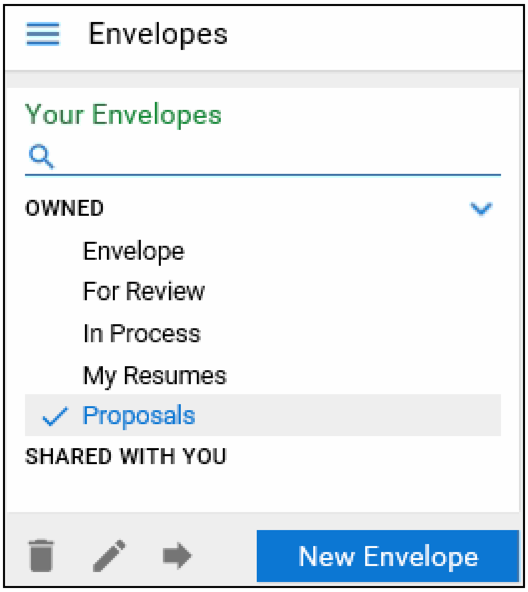
- Document Type user permissions are respected when sharing an envelope. For example, if you share an envelope with a user who does not have permission to Document Types in the envelope, the envelope will appear empty to that user. If the envelope contains both documents that the user does and does not have rights to, the Document Types the user can view are still displayed.
- In addition to Document Type permissions, users in the Web Client must be privileged to retrieve and view documents in order to view documents in a shared envelope.
- Users cannot delete an shared envelope that is owned by another user. If you share an envelope with another user, that user can delete the shared version of the envelope in their own list of available envelopes, but as the owner, you still retain the original envelope.

To share an envelope:

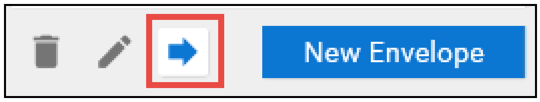
1. Access the Envelopes using the Accessing Envelopes instructions on page 274. The **Envelopes** panel is displayed.



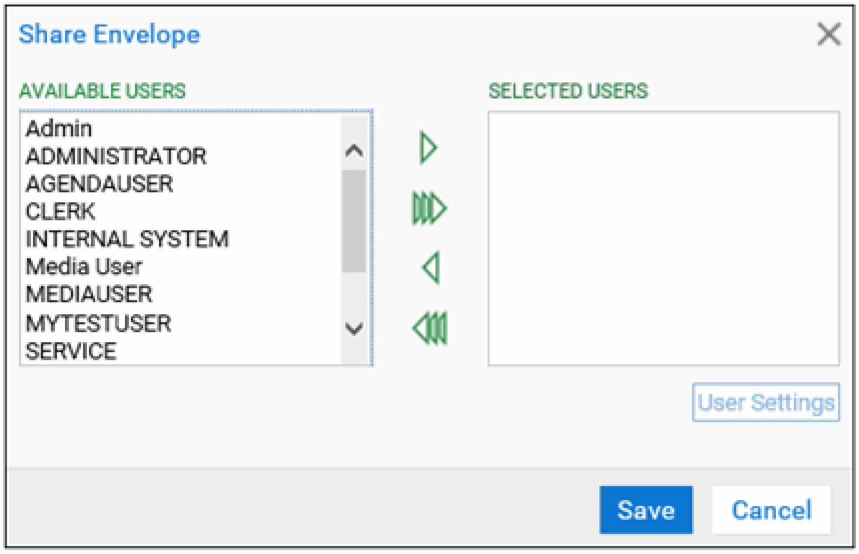
2. Select the envelope you want to share. A check mark is placed next to the envelope indicating that is has been selected.



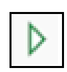
3. Click the **Share Envelope** button.



The **Share** button turns blue, and the **Share Envelope** dialog box is displayed.

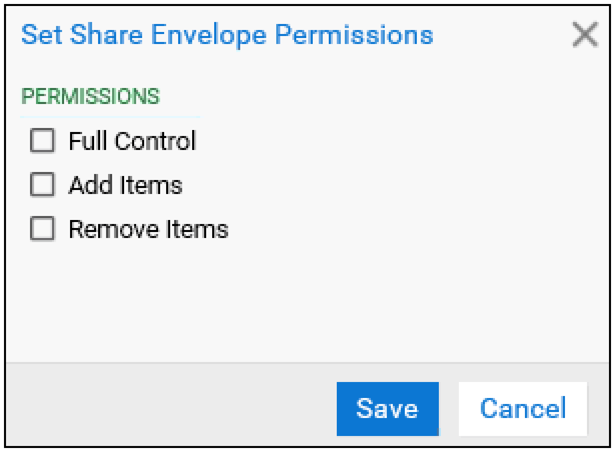


4. Select the users you want to share the envelope with from **Available Users**, and then click the **Add** button.



To share the envelope with all available users, click the **Add All** button.

5. To grant envelope permissions to a each specific user, select the user and click **User Settings**. The **Set Share Envelope Permissions** dialog box is displayed.



Settings can be configured for only one user at a time. You can grant the following permissions: **Full Control**, **Add Items**, and **Remove Items**.

Permissions	Description
Full Control	Allows the selected user to do the following: • Share the envelope. • Add documents to the envelope. • Remove documents from the envelope.
Add Items	Allows the selected user to add documents to the envelope.
Remove Items	Allows the selected user to remove documents from the envelope.

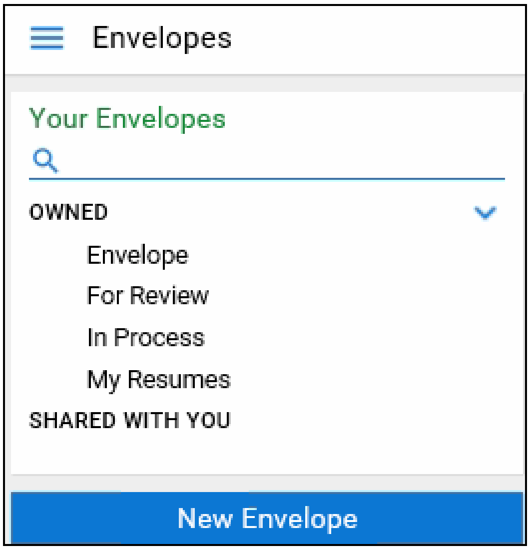
6. Click **Save** from the **Set Share Envelope Permissions** dialog box.
7. Click **Save** to save all changes in the **Share Envelope** dialog box.

Adding an Envelope to the Favorites list

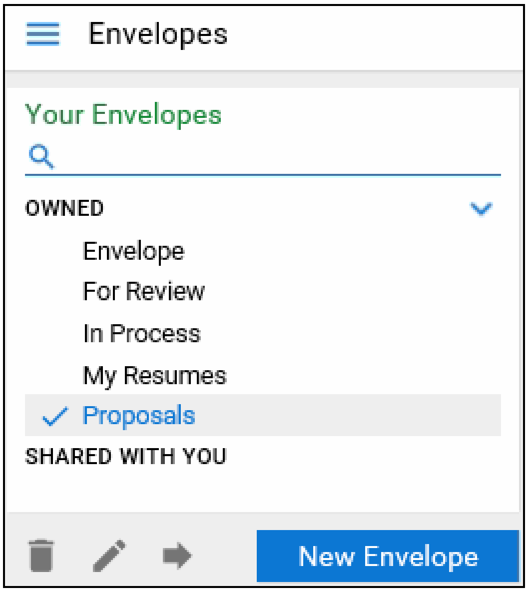
Envelopes can be added to your favorites list. This allows you to quickly locate an envelope that you use frequently.

To add an envelope to the favorites list:

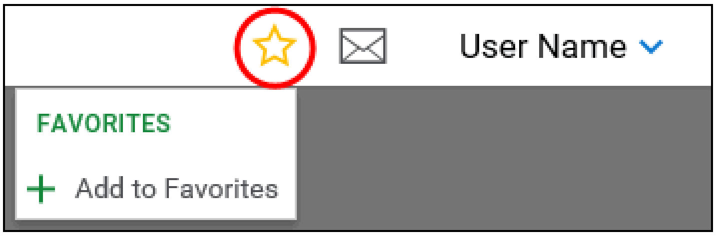
1. Access the Envelopes using the Accessing Envelopes instructions on page 274. The **Envelopes** panel is displayed.



2. Select the envelope you want to add to the favorites list. A check mark is placed next to the envelope indicating that is has been selected.



3. Click the **Favorites** button in the title bar of the Web Client screen. The **Favorites** menu is displayed.

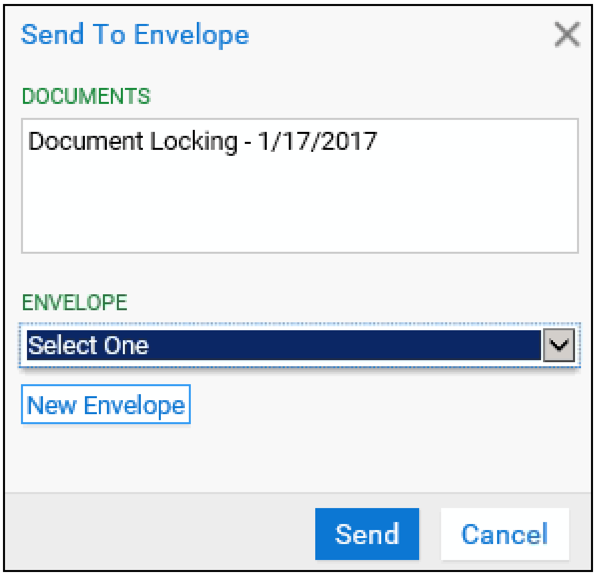


4. Click **Add to Favorites**. The **Add to Favorites** dialog box is displayed with the name of the envelope you selected from the envelopes list.
5. Click **OK** to add the envelope to the Favorites list.

Adding Documents to an Envelope

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

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



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

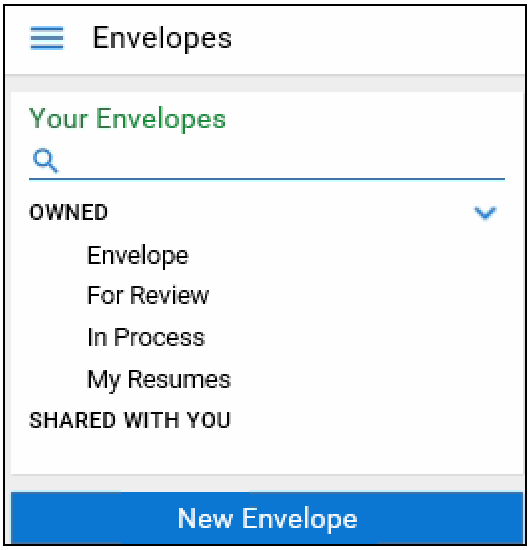
4. Click **Send**. The document is added to the selected envelope.

Removing Documents from Envelopes

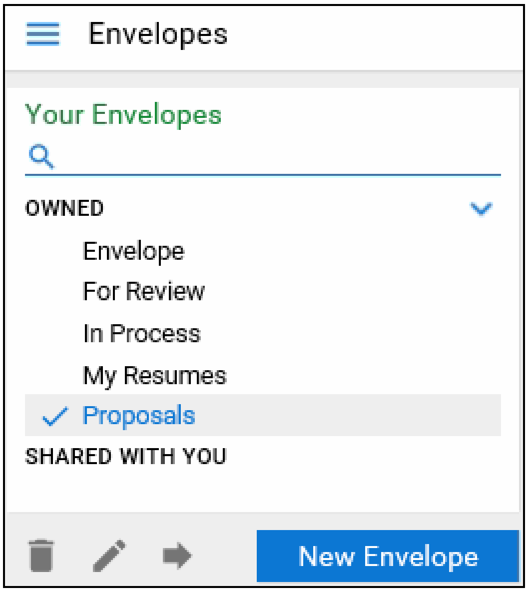
To remove one or more documents from an envelope:

1. Select **Envelopes** from the **User** section of the Main Menu.

The **Envelopes** panel is displayed.



2. Select the envelope containing the documents you want to display.



A list of documents contained within the envelope is displayed.

3. Select one or more documents to be removed.

Tip: You can select one document by clicking it, or select multiple documents by using standard Shift-click and Control-click techniques.

4. Right-click within the list, and select **Remove From Envelope** to remove the documents. The documents are removed from the envelope.

Notes and Annotations

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

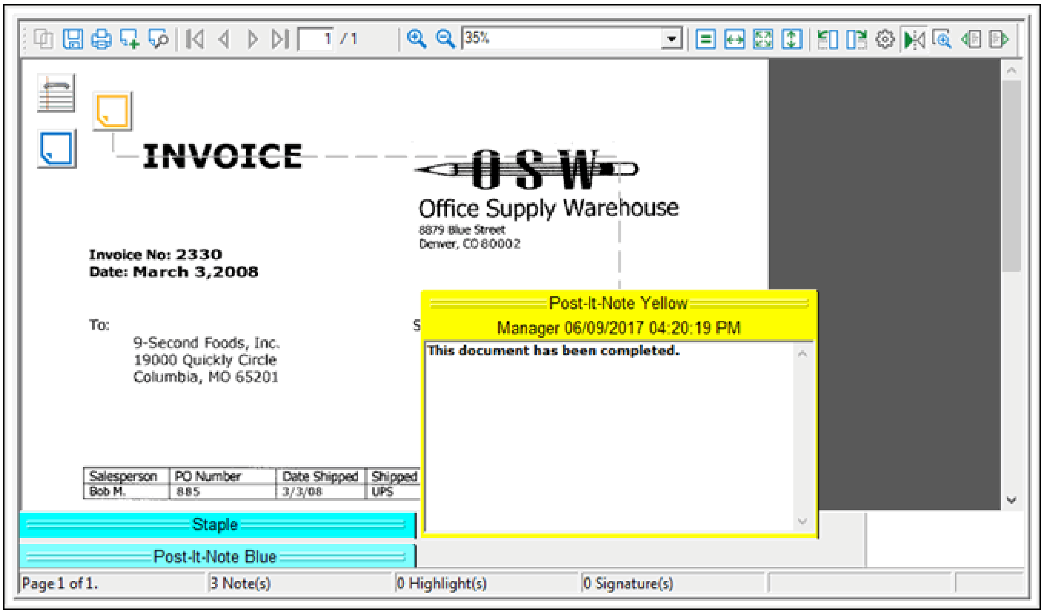
Note: You can view notes on an OLE document (such as a Microsoft Office document or PDF) in the **Notes** pane in the Document Viewer. See Notes Pane Viewer for OLE Documents on page 308. To add, edit, or delete notes on an OLE document, you must use the **Notes** dialog box. See Notes Dialog Box on page 298.

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

Notes Overview

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

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



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

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

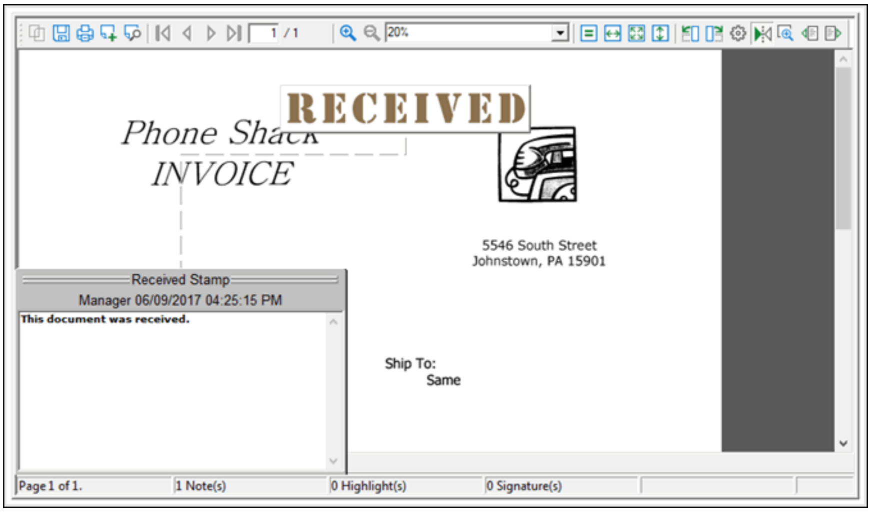
- Some notes may be configured to hide by default. To view any hidden notes, you can display a list of all notes on the document and open any notes from the list.
- Depending on your system setup and user privileges, you may be able to view, modify, delete or add notes to a Document Type, as well as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

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

Note Icons

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

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



Options

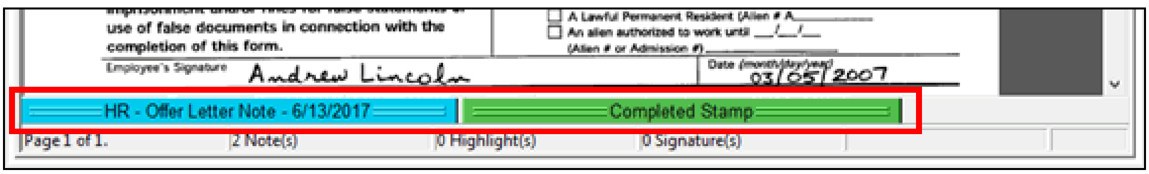
The **Options** button on the Viewer Control toolbar allows you to choose whether note icons and annotations are displayed while you're viewing a document.

Notes Toolbar

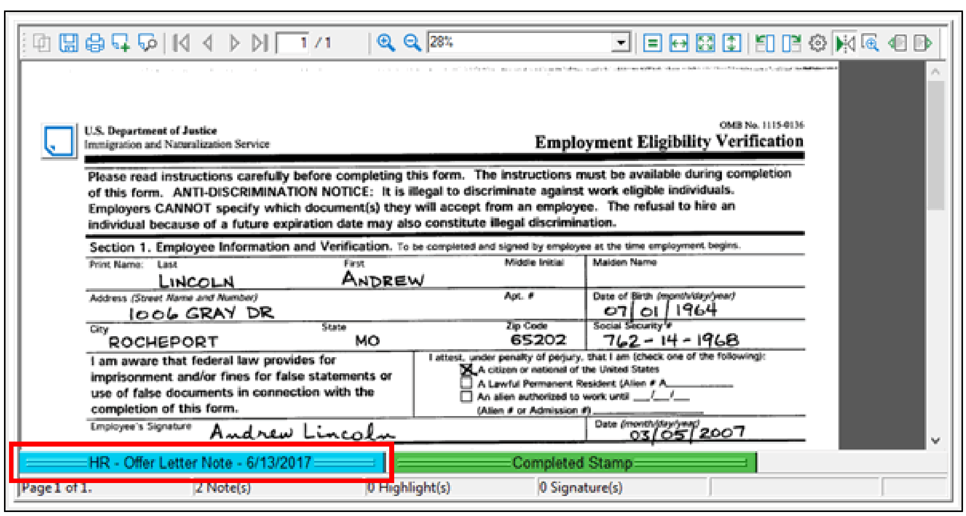
The **Notes** toolbar is a row of tabs representing notes and annotations on the current page. The toolbar is displayed along the bottom of the Document Viewer. You cannot undock and move this toolbar to another location.

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

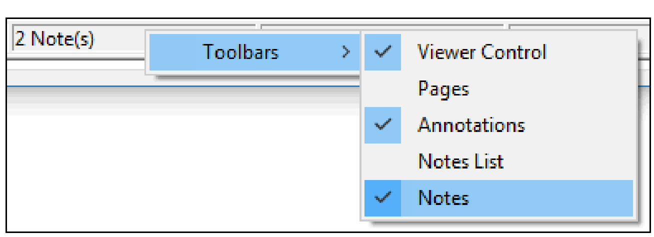
Note: If you are viewing a document that is locked by Records Management, you cannot create or modify notes.



Click a note tab to read the note or annotation.



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

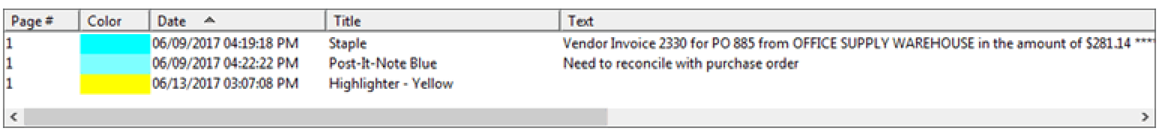


Note: HTML documents do not have toolbars. When you open an HTML document with one or more notes, OnBase displays the associated icon(s). Double-clicking an icon opens the note and displays its text. This action works only from HTML documents or from documents viewed in the HTML Web Client. Double-clicking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

Notes List Toolbar

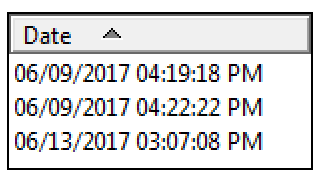
The **Notes List** toolbar displays all notes and annotations attached to a document in a list format. It tells the user the page on which the note is found, the note color, the date the note was created, the note type, and any text included within the note.

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



The following options are available in the Notes List:

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



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

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

View Notes - Open and View Notes or Annotations

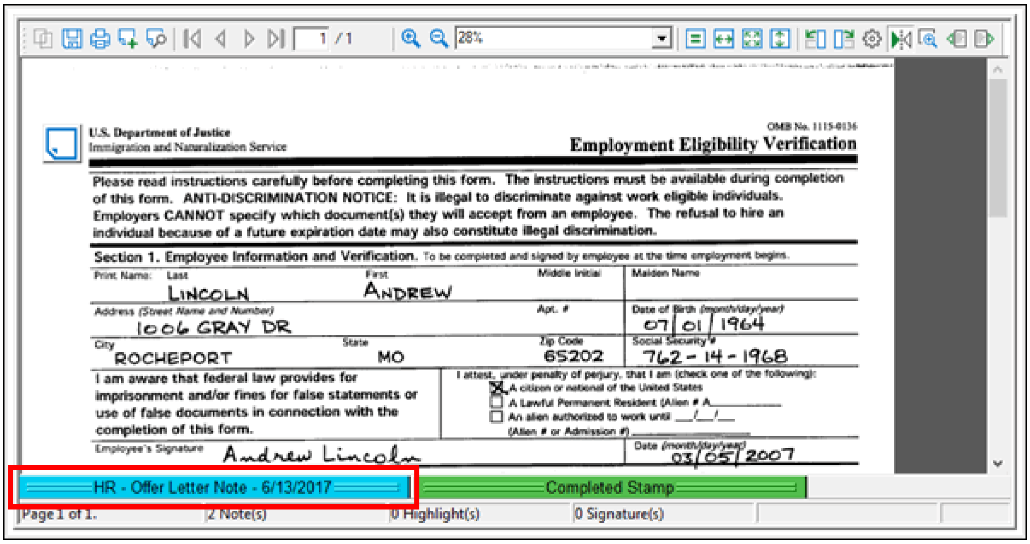
Users with the appropriate viewing rights will see most notes and annotations displayed on the document or displayed as tabs in the Notes toolbar at the bottom of the document.

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

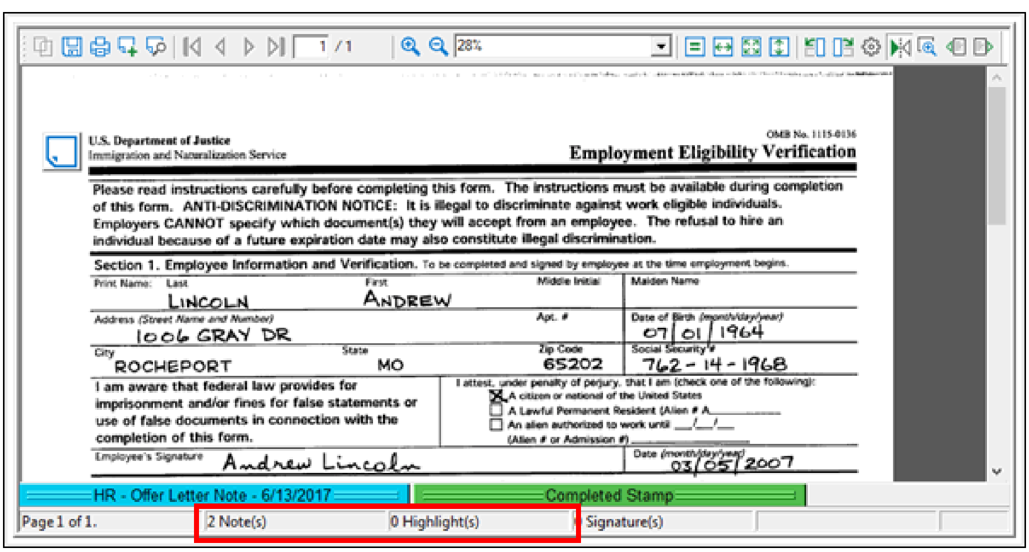
Viewing Notes

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

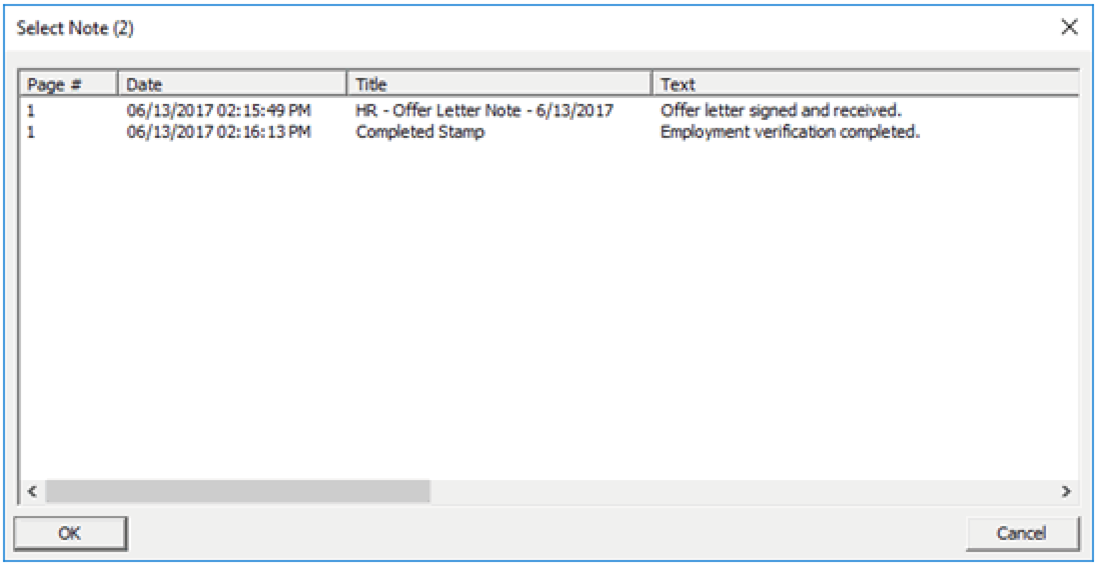
- Double-click the note's icon from the Document Viewer.
- Click the **View Notes** toolbar icon (ActiveX viewer only).
- Click the note's tab displayed in the **Notes** toolbar (ActiveX viewer only).



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



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



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

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

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

Moving Notes

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

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

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

Adding Notes, and Editing and Deleting Notes and Annotations

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

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

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

- Notes and annotations may contain messages that can be displayed and edited. If you have appropriate privileges, you can delete both notes and annotations from the **Notes** right-click menu.
- Note behavior differs slightly on HTML documents and in the HTML Document Viewer. For information about working with notes in these cases, see Add a Note in the HTML Document Viewer on page 294.
- Annotations are created using the Annotations toolbar. To add an annotation to a document, see the procedure for creating annotations.

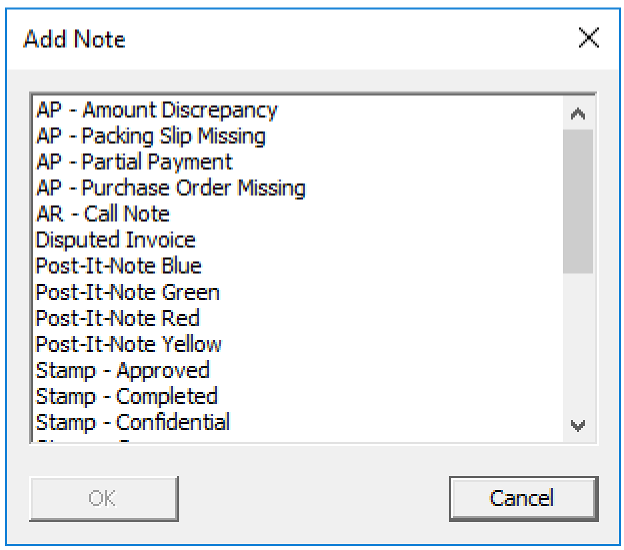
Add a Note to a Document

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

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

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

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



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

Add a Note in the HTML Document Viewer

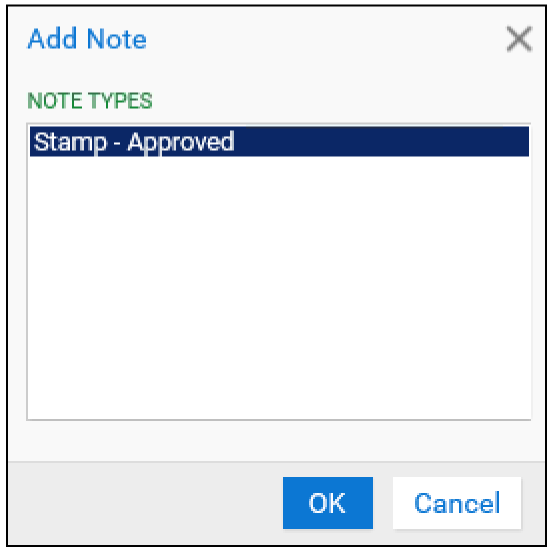
The following steps describe how to add notes to HTML documents and E-Forms and how to add notes in the HTML Document Viewer.

Note: You cannot add annotations to HTML documents.

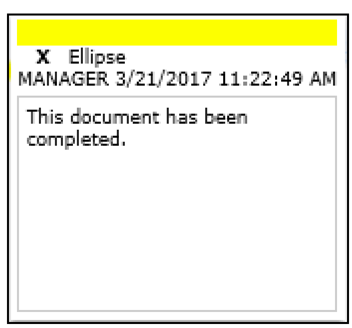
To create a note:

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

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



2. Select a Note Type and double-click, or click **OK** to add the note.
   The note is placed in the upper left-hand corner of the document. You can move the note by clicking and dragging the note or note icon on the document. The new position of the note is saved when an action is performed in either the document viewer toolbar or the right-click menu.



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

Edit Note or Annotation Text

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

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

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

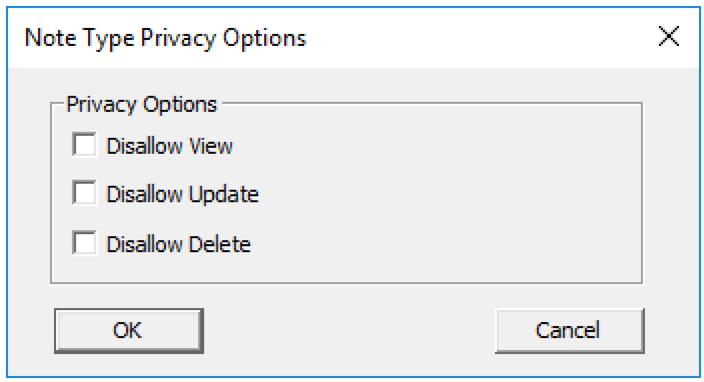
Note: Changes to notes and annotations are saved automatically. Notes that are moved off of the document revert to their last saved position.

Editing Note Type Privacy Options

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

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

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



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

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

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

Deleting a Note

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

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

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

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

Click **Yes** when prompted to confirm.

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

Changing the Note Type

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

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

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

Select the new type of note from the **Change Note Type** dialog box and click **OK**.

Note: Depending on system configuration for Note Types, some Note Types may be unavailable from the **Change Note Type** dialog box when using the ActiveX Web Client. See your system administrator for more information.

Notes Dialog Box

If you have appropriate privileges, you can add, view, edit, or delete notes using the **Notes** dialog box. The **Notes** dialog box is available in the following ways:

- Right-click a document in the Document Search Results list, which allows you to work with notes without opening documents.
- Right-click an open image document in the Document Viewer and select **Notes | View Notes** (HTML Web Client only).
- Click the **Note(s)** section of the status bar of the Document Viewer (HTML Web Client only).

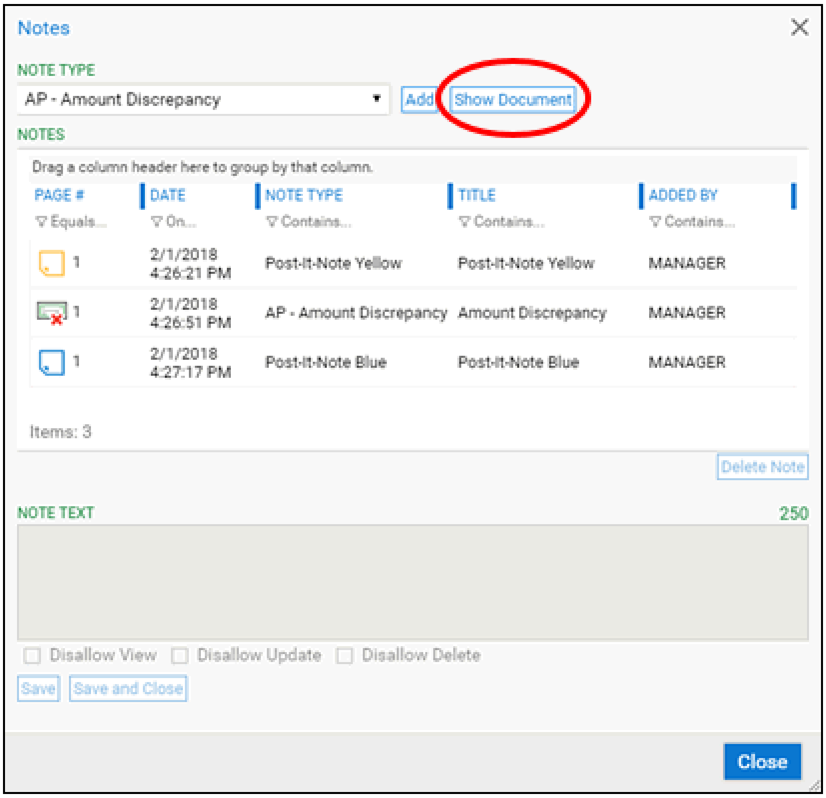
- For OLE documents (such as Microsoft Office documents or PDFs):
  - Select **Edit | Notes** from the OLE viewer menu.
  - Click **Edit** on an open note in the **Notes** pane.
  - Click the **Add Note** button in the **Notes** pane.

The **Notes** dialog box is the only way to add, edit, and delete notes on OLE documents in the Web Client. You can view the number of notes on an OLE document in the **Note(s)** section of the status bar or in the heading of the **Notes** pane in the Document Viewer. See Notes Pane Viewer for OLE Documents on page 308 for more information on viewing notes on OLE documents.

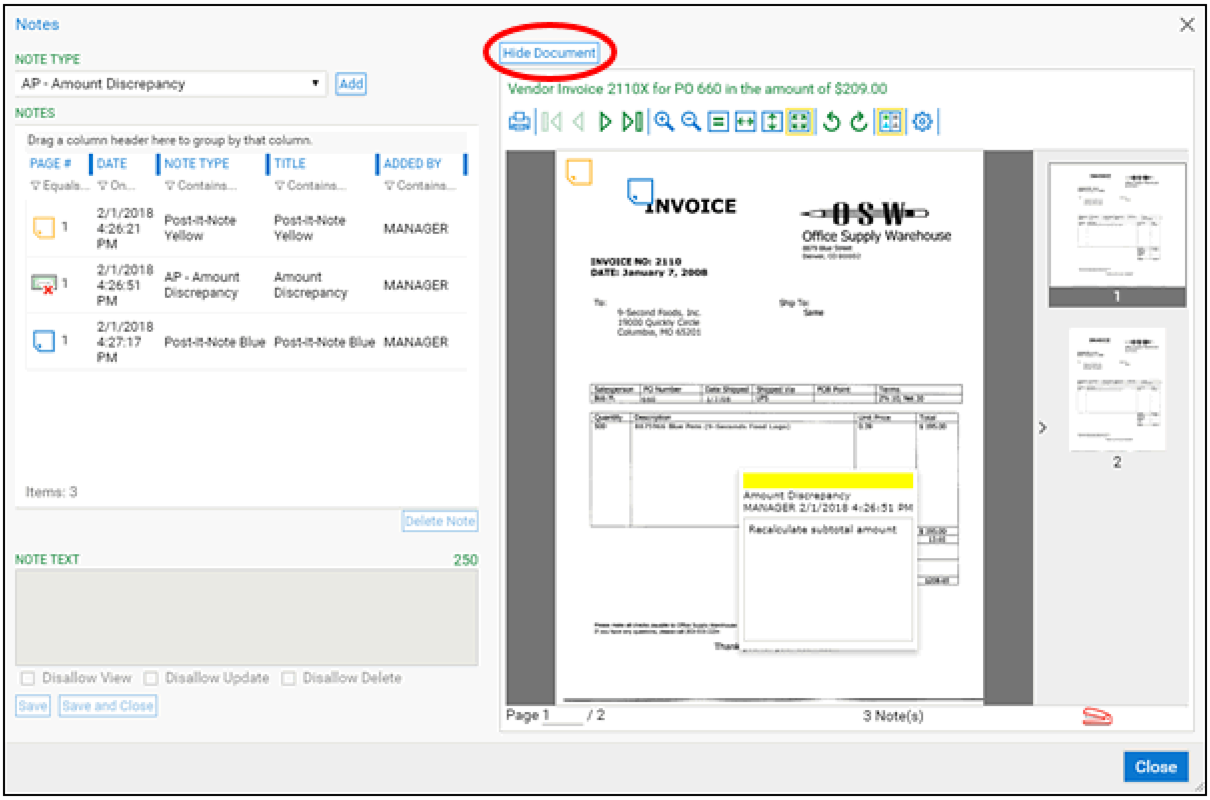
Note: If you have privileges to create a note but do not have privileges to modify it, you can modify the note's text only during the same viewing session that you created the note. After you close the document, the note's text becomes read-only.

Viewing a Document in the Notes Dialog Box

While working in the **Notes** dialog box, you can click the **Show Document** button to view the document alongside the notes in the dialog box.



Click **Hide Document** to hide the document and show only the notes in the dialog box.



Note the following limitations with viewing a document alongside notes in the **Notes** dialog box:

- Notes can only be added to the first page of a multi-page document in the **Notes** dialog box.
- Annotations cannot be drawn on a document being viewed in the **Notes** dialog box.

To accomplish any of these actions, perform them in the Document Viewer, not in the **Notes** dialog box.

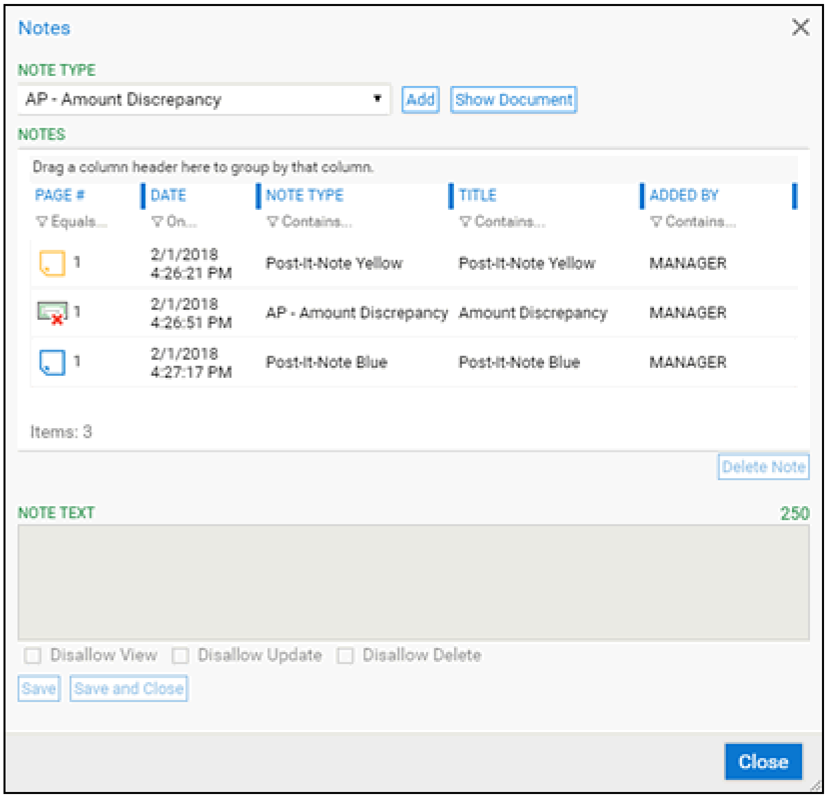
Viewing a Note in the Notes Dialog Box

To view a note in the **Notes** dialog box:

1. Open the **Notes** dialog box using one of the following methods:
   - Right-click a document in the Document Search Results list and select **Notes**.
   - Right-click an open document in the Document Viewer and select **Notes | View Notes** (HTML Web Client only).
   - Click the **Note(s)** section of the status bar (HTML Web Client only).

- From an open OLE document (such as a Microsoft Office document or PDF):
  - Select **Edit | Notes** from the OLE viewer menu.
  - Click **Edit** on an open note in the **Notes** pane.

The **Notes** dialog box displays any notes on the document.



2. Select a note to view any note text in the **Note Text** box.

Adding a Note in the Notes Dialog Box

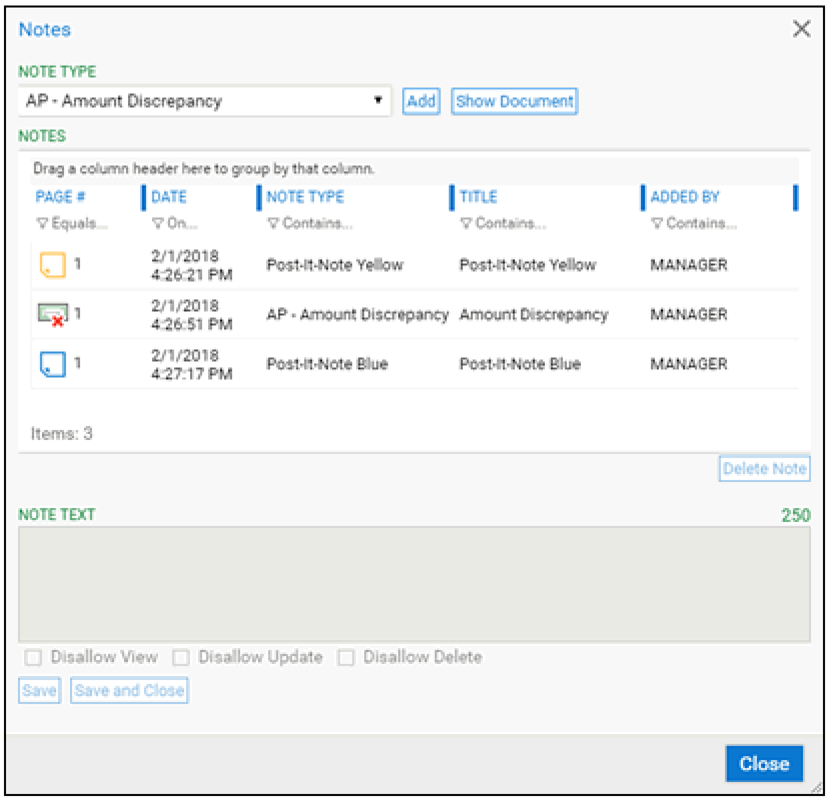
The **Notes** dialog box allows you to add, view, edit, or delete notes on an open document.

To add a note using the **Notes** dialog box:

1. Open the **Notes** dialog box using one of the following methods:
   - Right-click a document in the Document Search Results list and select **Notes**.
   - Right-click an open document in the document viewer and select **Notes | View Notes** (HTML Web Client only).
   - Click the **Note(s)** section of the status bar (HTML Web Client only).

- From an open OLE document (such as a Microsoft Office document or PDF), do one of the following:
  - Select **Edit | Notes** from the OLE viewer menu.
  - Click the **Add Note** button in the **Notes** pane.

The **Notes** dialog box is displayed.



2. Select a note type from the **Note Type** drop-down list, and click **Add**. The new note is added to the **Notes** list. If the note type is configured to include default text, it is displayed in the **Note Text** field.
3. Enter or modify the text of the note in the **Note Text** field. The character counter displays the remaining characters allowed in the note.

4. Select the privacy options to enable or disable for the selected note. The following privacy options are located below the **Note Text** field:

Note Privacy Option	Description
Disallow View	Prohibits all other users from viewing the note. **Note:** If this option is selected, other users can still successfully search for text in the note using the OnBase Client, but they will not be able to view the note.
Disallow Update	Prohibits all other users from editing the note.
Disallow Delete	Prohibits all other users from deleting the note.

Note: Depending on the configuration of the note type, you may be unable to modify some privacy options. For more information on note privacy options, see Setting Note Privacy Options on page 306.

5. Click **Save** to save the note to the document and keep the **Notes** dialog box open, or click **Save and Close** to save the note and close the **Notes** dialog box.

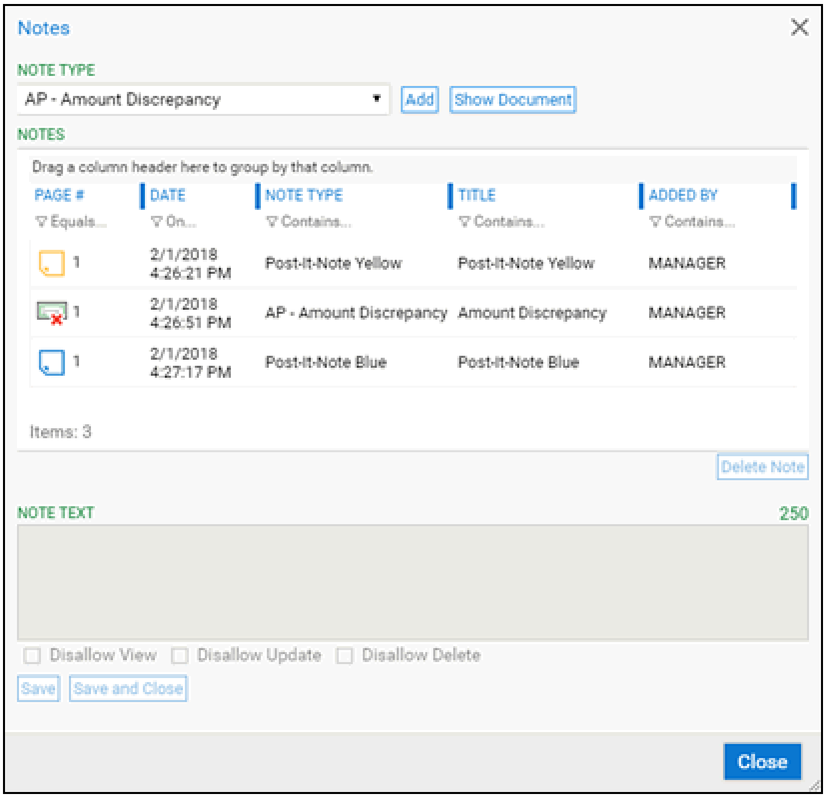
Editing a Note in the Notes Dialog Box

To edit a note in the **Notes** dialog box:

1. Open the **Notes** dialog box using one of the following methods:
   - Right-click a document in the Document Search Results list and select **Notes**.
   - Right-click an open document in the Document Viewer and select **Notes | View Notes** (HTML Web Client only).
   - Click the **Note(s)** section of the status bar (HTML Web Client only).

- From an open OLE document (such as a Microsoft Office document or PDF):
  - Select **Edit | Notes** from the OLE viewer menu.
  - Click **Edit** on an open note in the **Notes** pane.

The **Notes** dialog box is displayed.



2. Select the note to be edited from the **Notes** list.
3. Edit the text in the **Note Text** box. Right-click for additional text editing options. The character counter displays the remaining characters allowed in the note.
4. Click **Save** to save the note to the document and keep the **Notes** dialog box open, or **Save and Close** to save the note and close the **Notes** dialog box.

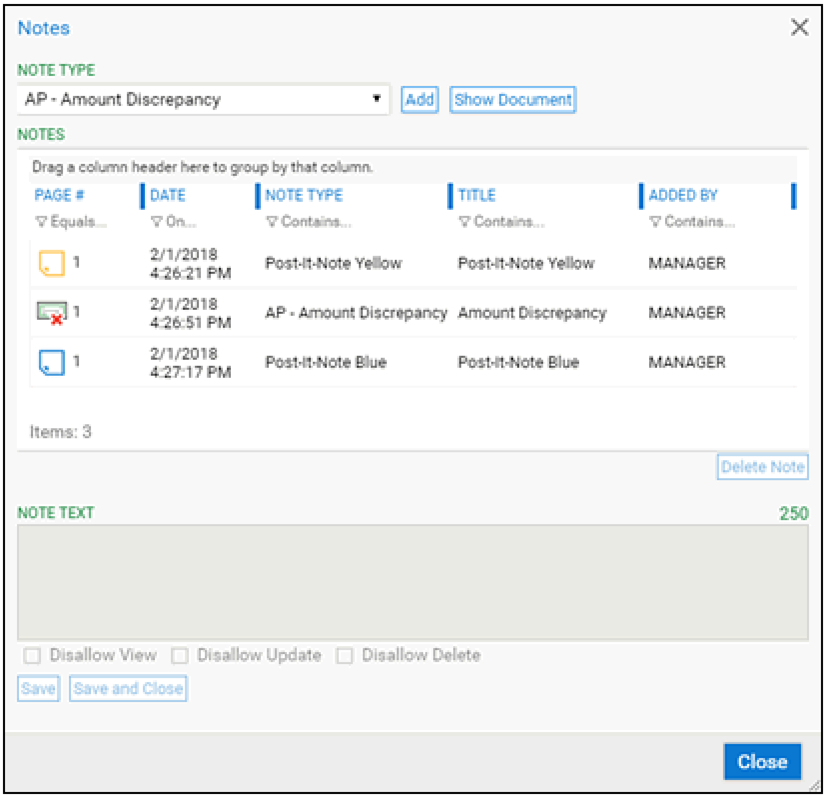
Deleting a Note in the Notes Dialog Box

To delete a note from the **Notes** dialog box:

1. Open the **Notes** dialog box using one of the following methods:
   - Right-click a document in the Document Search Results list and select **Notes**.
   - Right-click an open document in the Document Viewer and select **Notes | View Notes** (HTML Web Client only).
   - Click the **Note(s)** section of the status bar (HTML Web Client only).

- From an open OLE document (such as a Microsoft Office document or PDF):
  - Select **Edit | Notes** from the OLE viewer menu.
  - Click **Edit** on an open note in the **Notes** pane.

The **Notes** dialog box is displayed.



2. Select the note to be deleted from the **Notes** list.
3. Click **Delete Note**. You are prompted to confirm the deletion.
4. Click **Yes** to delete the note.

Note: If you delete a Staple note from the Notes list on one document, the corresponding staple that was attached to the deleted staple is still displayed on the other corresponding document. If you do not want the staple on the corresponding document, you must delete it also.

Setting Note Privacy Options

Depending on your system's configuration, you may be able to set privacy options for notes that you have created. Privacy options are used to determine whether or not other users can view, change, or delete a note that you have created.

Consider the following when setting note privacy options in the Web Client:

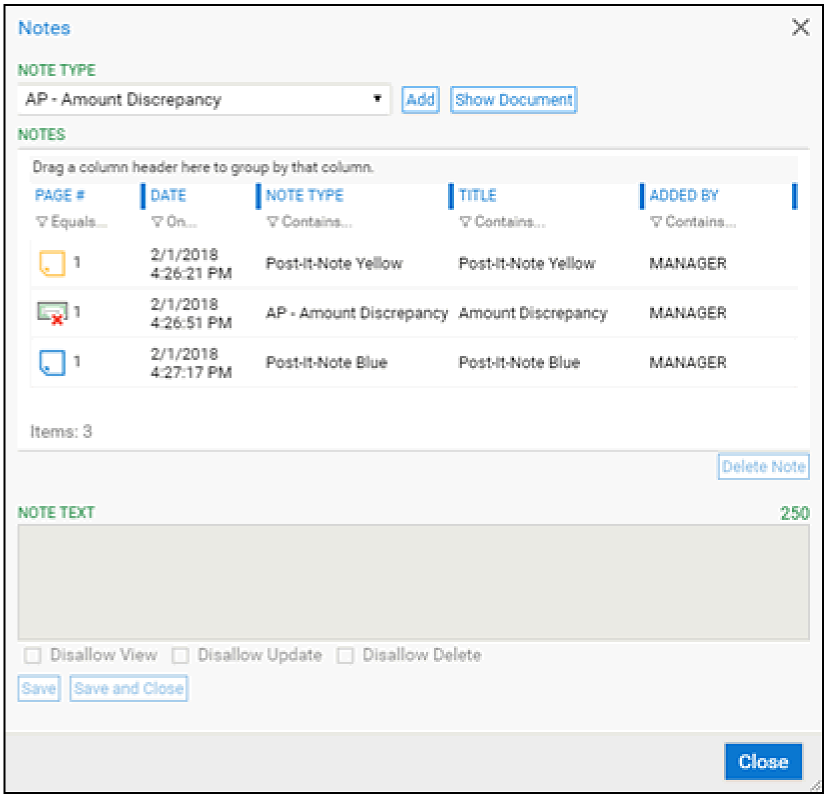
- Users with administrative rights are always able to view, update, and delete all notes and to view and set note privacy options for all notes.
- Only the creator of a note (and any users with administrative rights) can view and set the privacy options of that note.
- If a document is locked, the privacy options for all notes on that document cannot be modified by any other users. This includes any users with administrative rights.
- The privacy options for a note type may be set by default by your system administrator.

In the Web Client, note privacy options are set in the **Notes** dialog box. To set note privacy options:

1. Open the **Notes** dialog box using one of the following methods:
    - Right-click a document in the Document Search Results list and select **Notes**.
    - Right-click an open document in the Document Viewer and select **Notes | View Notes** (HTML Web Client only).
    - Click the **Note(s)** section of the status bar (HTML Web Client only).

- From an open OLE document (such as a Microsoft Office document or PDF):
  - Select **Edit | Notes** from the OLE viewer menu.
  - Click **Edit** on an open note in the **Notes** pane.

The **Notes** dialog box is displayed.



2. Select the note that you want to modify from the **Notes** list.
3. Select the privacy options to enable or disable for the selected note. The privacy options are located below the **Note Text** field. The following privacy options are available:

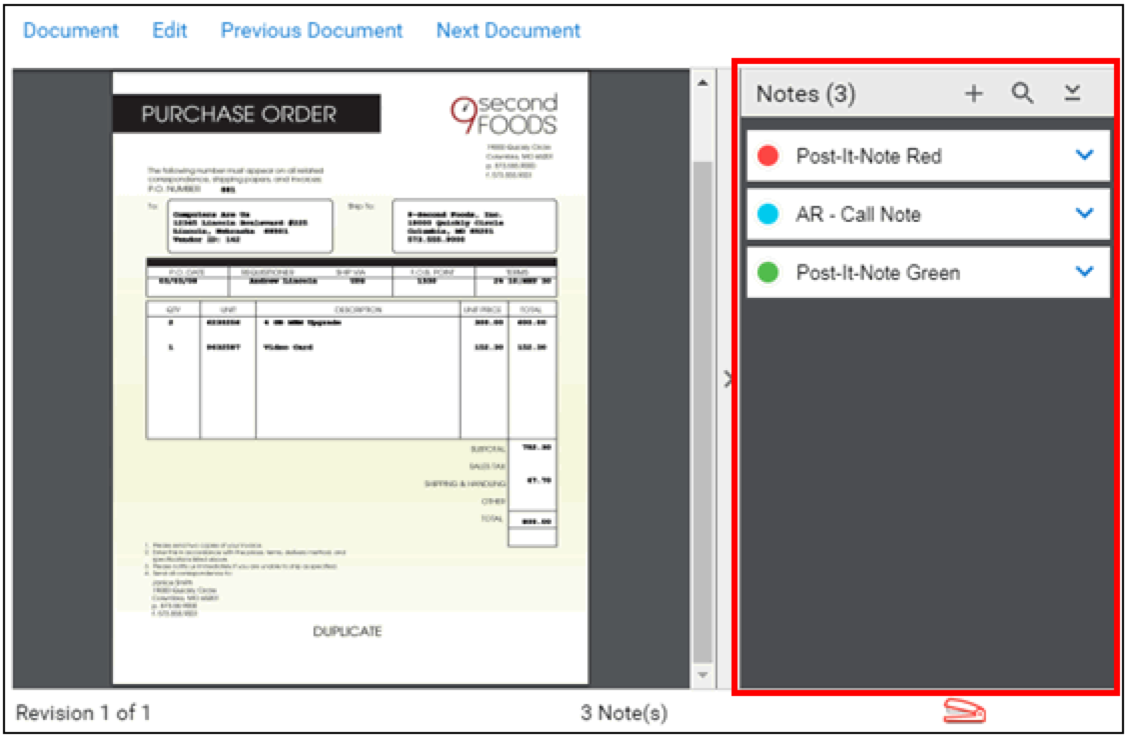
Note Privacy Option	Description
Disallow View	Prohibits all other users from viewing the note. **Note:** If this option is selected, other users can still successfully search for text in the note using the OnBase Client, but they will not be able to view the note.
Disallow Update	Prohibits all other users from editing the note.
Disallow Delete	Prohibits all other users from deleting the note.

4. Click **Save** to save the note to the document and keep the **Notes** dialog box open, or **Save and Close** to save the note and close the **Notes** dialog box.

Notes Pane Viewer for OLE Documents

When viewing a document in the OLE document viewer, the notes on the document are listed in the **Notes** pane of the viewer. The OLE document viewer is used to display OLE documents such as Microsoft Office documents and PDF documents (depending on your configuration).

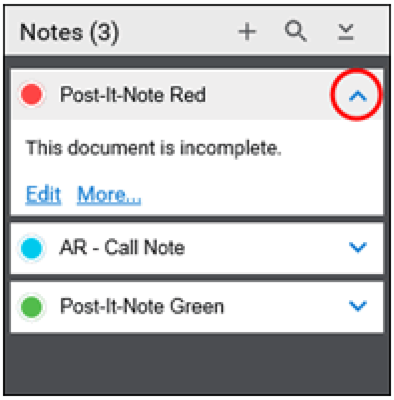
The **Notes** pane displays all of the notes on the document, and each note's color is displayed next to the name of the Note Type. The total number of notes is also displayed in the heading of the pane.



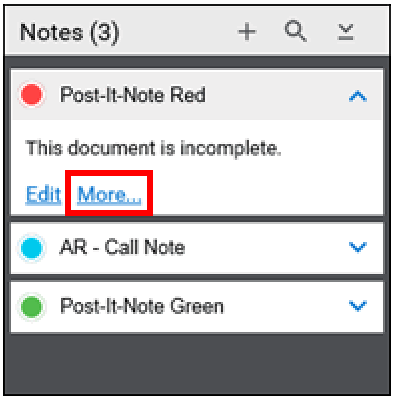
Note: The **Notes** pane only allows you to view the notes on the OLE document. To add, edit, or delete notes, you must use the **Notes** dialog box by clicking **Edit** on a note in the **Notes** pane, or clicking the **Note(s)** section of the status bar. For more information on using the **Notes** dialog box, see Notes Dialog Box on page 298.

The following functions are available in the **Notes** pane of the Document Viewer:

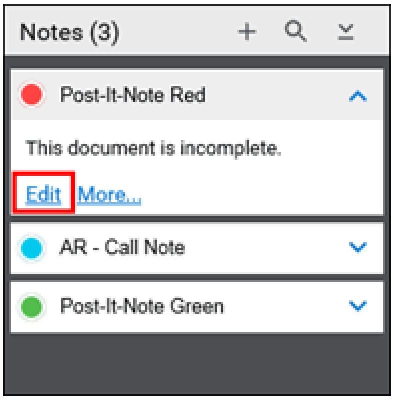
- To expand a note and view its contents, click the note in the **Notes** pane. Click the heading of the note again to collapse the note.



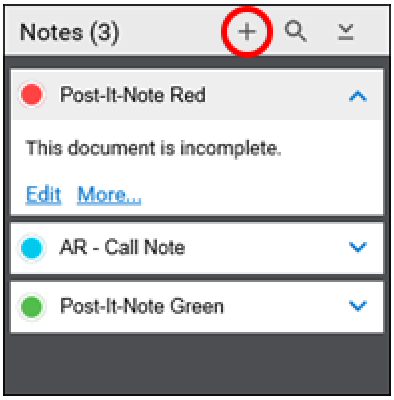
- To view additional information on a note, expand it and then click **More**. The note's icon, creation date and time, and creator's user name are displayed.



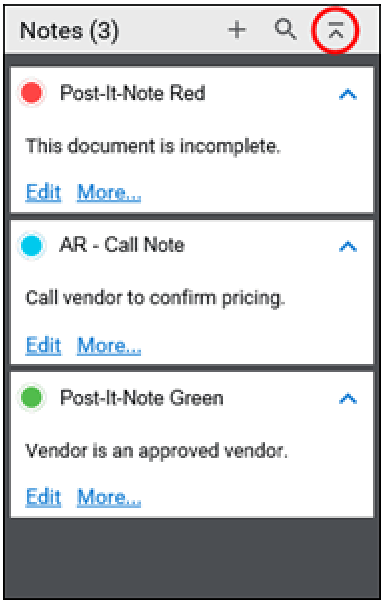
- To edit a note, expand the note and click **Edit**. The **Notes** dialog box is displayed, which allows you to edit the note.



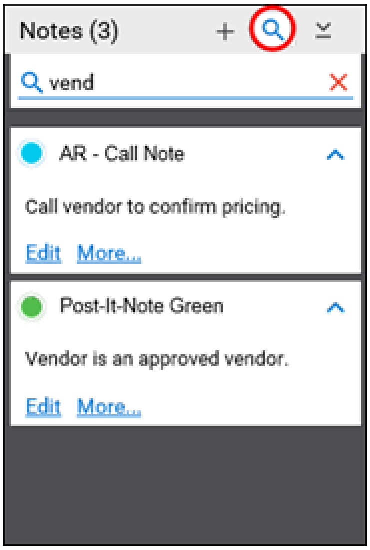
- To add a new note, click the **Add Note** button at the top of the **Notes** pane. The **Notes** dialog box is displayed, which allows you to create a new note.



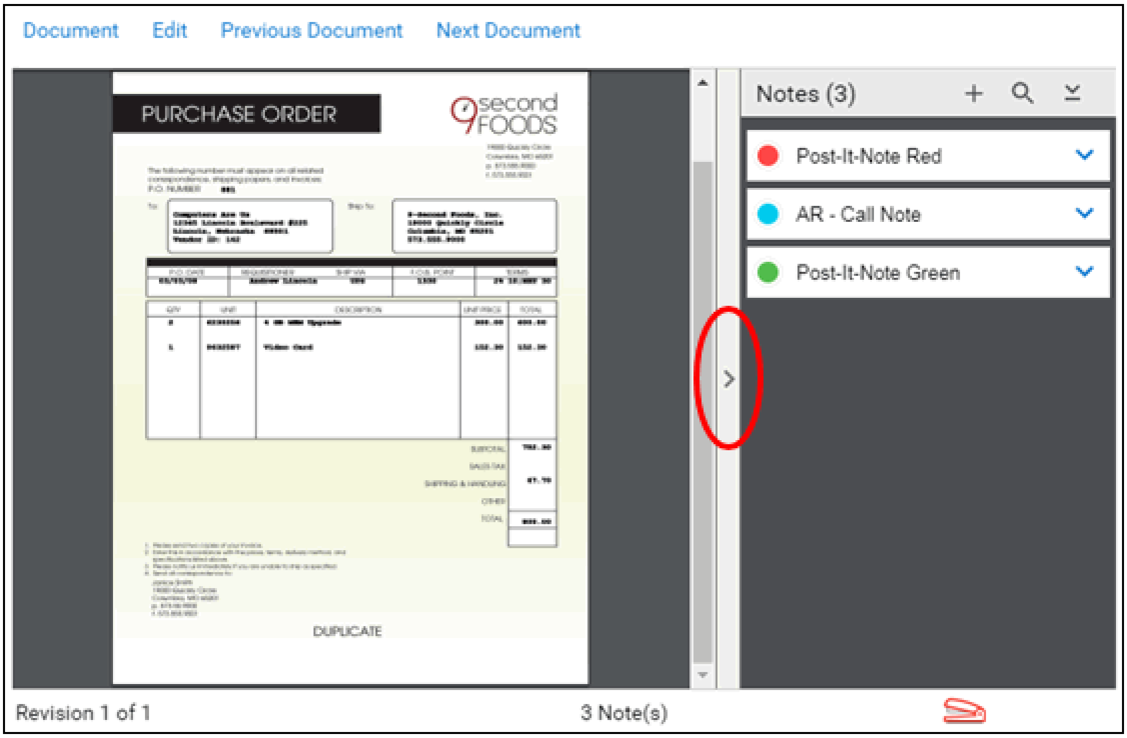
- To expand all notes, click the **Expand All** button at the top of the **Notes** pane. Click the button again to collapse all notes.



- To filter the list of notes, click the filter button at the top of the **Notes** pane and enter search terms into the **Note Text** field. The list is filtered to display only the notes that contain matching text. Click the red **X** to remove the filter.

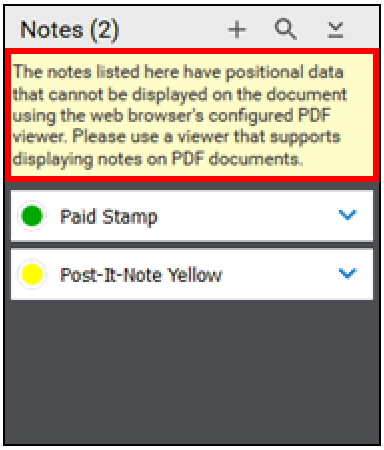


- To hide the **Notes** pane, click the handle next to the pane.



Click the handle again to expand the **Notes** pane.

- If any notes have specific positions on a PDF document, the **Notes** pane contains a notice explaining that the document viewer cannot display the position of these notes on the PDF. To display the positions of notes and note icons on a PDF document, use the Web Client PDF viewer instead of the web browser's PDF viewer. See your system administrator for more information.



Annotations

Annotations are similar to OnBase notes. An annotation can be used to call attention to items in a document, it can contain a message, and it may be represented by an icon. However, annotations also allow you to call attention to a portion of the document with special markings, such as arrows, highlights, and ellipses.

Note: If you are viewing a document that has been locked by Records Management, in the ActiveX environment, the Annotations toolbar is selectable, but does not perform any functions. In the HTML environment, the Annotations toolbar is locked and cannot be used.

When enabled, the Notes toolbar displays annotation-related notes along the bottom of the viewer window.

Characteristics such as color and title are predefined when the note is configured for use. Several types of annotations can be created:

- Arrows typically point to a specific item.
- Ellipses typically circle an area of interest.
- Overlapping Text allows user-defined text to be displayed over the document.
- Highlights place a translucent color over the area of interest.

Redaction annotations can be used to produce an entirely new image document, in which the annotation is permanently applied to the document.

Note: The Arrow, Ellipse, and Overlapped Text note types are not available for use on all documents. Availability depends on the file format of the document.

Annotations Toolbar

The Annotations toolbar provides buttons for adding annotations or redactions to a document. You can show or hide the Annotations toolbar; by default it may be hidden.

For more information, see Creating an Annotation on page 314.

Note: If you are viewing a document that is locked by Records Management, the options on the Annotations Toolbar are selectable, but do not perform any tasks.

You can view, modify, or delete annotations the same way you do notes.

Button	Description
	**Toggle Redaction** lets you draw black or white rectangles over a portion of the document. The color of the redaction is determined by the adjacent drop-down list. You remain in redaction creation mode until you click the **Toggle Redaction** button again. This option is available for image documents only. You must have sufficient privileges to modify the document.
	**Save Redactions** saves any redactions that you have added to the document but not yet saved. You can save redactions only if the following requirements are met: • You have sufficient privileges to modify the current document. • The document is configured to allow redactions. • The document has an image or text report format.
	**Toggle Annotation** enables you to add one or more annotations to the document by selecting the annotation(s) from the adjacent drop-down list of available annotation types. You remain in annotation addition mode until you click the **Toggle Annotation** button again.

Note: Not all File Formats allow annotations. See your system administrator if the **Toolbars | Annotations** right-click option is not available.

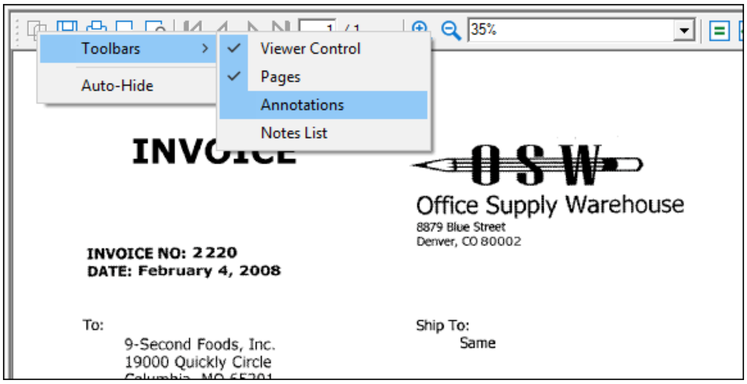
Creating an Annotation

If you have sufficient privileges, you can create annotations on text and image documents using the Annotations toolbar.

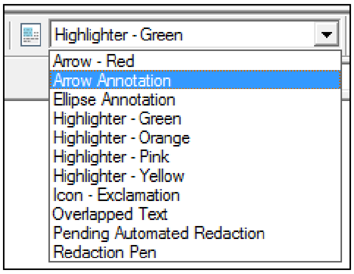
Annotation behavior differs slightly in the HTML Web Client. For more information about working with annotations in these cases, See Creating Annotations in the HTML Document Viewer on page 316.

1. Ensure that the Annotations toolbar is displayed on the Document Viewer.

   If the toolbar is not displayed, enable it by right-clicking the document or the Document Viewer and selecting **Toolbars | Annotations**.



2. In the Annotations toolbar, select the type of annotation from the drop-down list. By default, the drop-down list displays the most recent annotation you applied to a document with the same file format.



Note: Depending on your system's configuration, redaction annotations may be available from the annotations drop-down list. Redaction annotations are not supported for creating permanent redactions in the OnBase Web Client or DocPop. To create a permanently redacted document, see Creating a Redaction on page 319.

Note: You can use redaction annotations to print redacted documents on an ad hoc basis. To remove redaction annotations after printing a document, see Deleting a Note on page 297.

3. Enable the selected annotation by clicking the **Toggle Annotation** button.

Tip: You can also create annotations using the Rubber Band feature if **Draw Annotation On Rubberband** is selected in Viewer Options. When this options is selected, you do not have to click the **Toggle Annotation** button to enable the annotation. To create the annotation using the Rubber Band feature, press **Ctrl** as you click and drag the pointer over the document. For more information, see Options Button - OnBase Viewer Options on page 176.

4. Using the pointer, define the location and size of the annotation by clicking and dragging the pointer over the document. Release the mouse button when finished to display the annotation.

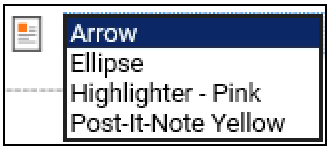
Note: Ensure that the annotation is large enough to be visible. Annotations are required to be a certain size before they can be created and saved.

Creating Annotations in the HTML Document Viewer

The HTML Document Viewer allows you to place annotations on text and image documents.

To create and place an annotation on a text or image document:

1. In the Document Viewer toolbar, select the type of annotation from the drop-down list:



2. Enable the selected annotation by clicking the **Toggle Annotation** button:

3. Using your mouse pointer, define the location and size of the annotation by clicking and dragging the pointer over the document. Release the mouse button when finished to display the annotation.

Note: Ensure that the annotation is large enough to be visible. Annotations are required to be a certain size before they can be created and saved.

Moving and Resizing Annotations in the HTML Document Viewer

If you have appropriate privileges, and if an annotation is configured to be movable, you can move and resize annotations after they have been placed on a document.

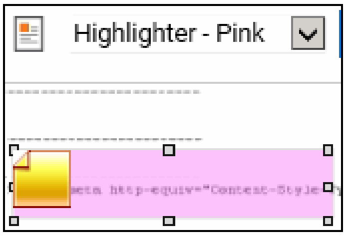
To move an annotation on a document, do one of the following:

- Click and drag the annotation to a new location.
- Double-click the annotation, then use the arrow keys on the keyboard to move the annotation to a new location.

Tip: When using the arrow keys on the keyboard to move an annotation, press and hold the **Ctrl** key while pressing the arrow keys to move the note more quickly.

To resize an annotation on a document, do the following:

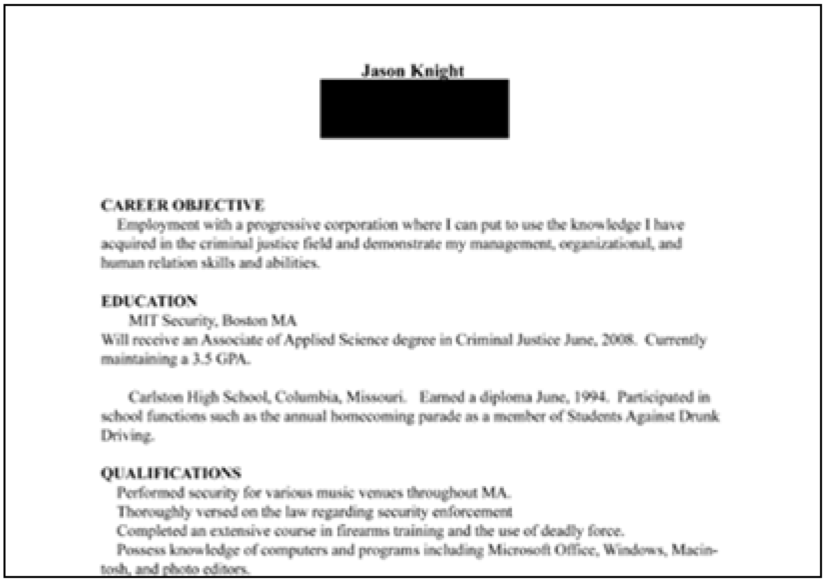
1. In the Document Viewer, double-click the annotation you want to resize. The annotation is selected.



2. Click and drag the edges or corners of the annotation until the annotation is the correct size. The mouse pointer changes to indicate the direction in which the annotation can be resized.
3. When you are finished resizing the annotation, click a different area of the screen to deselect the annotation.

Redactions

A redaction is a special kind of annotation used to hide confidential information on an image or text document. A redaction is a permanent black or white rectangle that obscures an area of the document. Redactions can be added in both HTML and ActiveX environments.



Jason Knight

[redacted]

CAREER OBJECTIVE

Employment with a progressive corporation where I can put to use the knowledge I have acquired in the criminal justice field and demonstrate my management, organizational, and human relation skills and abilities.

EDUCATION

MIT Security, Boston MA
Will receive an Associate of Applied Science degree in Criminal Justice June, 2008. Currently maintaining a 3.5 GPA.

Carlston High School, Columbia, Missouri. Earned a diploma June, 1994. Participated in school functions such as the annual homecoming parade as a member of Students Against Drunk Driving.

QUALIFICATIONS

Performed security for various music venues throughout MA.
Thoroughly versed on the law regarding security enforcement
Completed an extensive course in firearms training and the use of deadly force.
Possess knowledge of computers and programs including Microsoft Office, Windows, Macintosh, and photo editors.

Redactions can be created and saved on image documents, text documents, and Image Rendered PDFs that are part of Document Types configured to allow redactions. See your system administrator to verify whether a Document Type has been configured for redactions.

A redaction cannot be deleted (or undone) once it has been saved. When a redaction is saved, the redacted document is stored either as a new document in another Document Type or as a revision of the current document. How the redacted document is stored depends on your system's configuration.

Note: Depending on your system's configuration, redaction annotations may be available from the annotations drop-down list. These annotations are supported only in the OnBase Client and Unity Client and should not be used for creating permanent redactions in the Web Client.

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

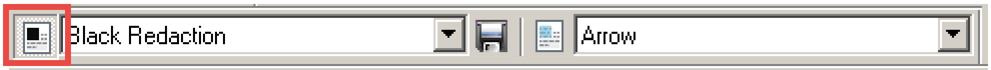
Creating a Redaction

You can apply and save redactions to a document if all of the following conditions are met:

- You have sufficient privileges to modify the document.
- The document's file type supports redactions. Only image and text files can be redacted.
- The document's Document Type is configured to allow redactions.

Note: You can print redacted documents on an ad hoc basis even if their Document Types are not configured for redactions. Apply the redactions, and then print the document. Then, close the document without saving the redactions.

1. Click the **Toggle Redaction** button from the Annotations toolbar.



2. From the redaction drop-down list, select whether you want to create a black redaction or a white redaction. If you select **Black Redaction**, the redacted area will be defined by a black, opaque rectangle. If you select **White Redaction**, the redacted area will be defined by a white, opaque rectangle.
3. Using your mouse, define the location and size of the redaction by clicking and dragging the pointer over the area you want to redact. Repeat for each area you want to redact.
4. Save the redacted image by clicking the **Save Redaction** button.
   - OnBase displays the message **Your redaction has been saved successfully**, indicating that the redacted document has been created. Depending on your system's settings, this redacted document is saved to another Document Type (the original document may also be deleted in this scenario), is saved as a revision of the current document, or replaces the original document.

Note: If your system is configured to save the redacted document as a revision, you may lose annotations or notes that were applied to the original document. See your system administrator for questions regarding redaction settings.

   - If OnBase indicates that the redaction could not be saved, the Document Type may not be configured for redactions.
   - If the document is closed or refreshed before one or more redactions have been saved, a message box prompts you to **Save Redactions** or **Close**. To save all created redactions, click **Save Redactions**. To discard them, click **Close**.

Note: In the HTML Viewer, if you switch between Overlay and Non-Overlay modes, a message is displayed indicating that the redaction will be removed.

Staples

Documents can be attached to each other using the **Staple** and **Back Stable** Note Types. In most cases, staples are used to associate documents that have an established logical relationship. For example, documents related to a single customer may be stapled together or an invoice and its associated purchase order may be stapled together. Logical relationships between documents can be established by a user but are not required by OnBase to staple documents.

When documents are stapled, a Staple icon is placed on each document. Staple icons can be used to directly open associated documents. Since staples only create a link between documents, the stapled documents remain separate.

Staple icons can also be used to open the staple's note, which displays creation information and allows the addition of customized text.

When using staples, consider the following:

- The Staple icon and staple note are placed on the primary document, and a Back Staple icon and back staple note are placed on secondary documents.
- For documents consisting of multiple revisions, Staple icons appear on all revisions. When viewing a stapled document from any revision of an open document, the latest available revision of the stapled document is displayed.
-
- When printing a document using the HTML Web Client, Staple icons will not be printed when selecting **Note Icon/Annotation on Document** in the **Print Settings**.
- Not all file formats support using staples. See your system administrator to verify whether your document supports using staples.

Working with Staples

Staple behavior differs slightly depending on the type of documents being stapled. Most image documents can stapled from open documents, but certain document types (such as OLE documents or E-Forms) must be stapled using the stapler icon. For information about working with notes in these cases, see Stapling Documents with the Stapler Icon on page 321.

Stapling Documents from Open Documents

To staple one or more open documents to another open document:

1. Open the initial document to which other documents will be stapled.

Note: The initial document cannot be an OLE document or E-Form. To staple an OLE document or E-Form to another document, see Stapling Documents with the Stapler Icon on page 321.

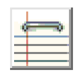
---

2. Open the secondary document(s) that you want to staple to the initial document.

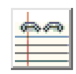
Note: To staple documents, you must have both images open in separate Document Viewer windows. If you are working with documents in the Web Client, you can right-click a document from a Document Search Results list and select **Open in New Window**.

---

3. Right-click and drag each secondary document onto the initial document.
   A staple icon is displayed on the primary document.



A back staple icon is displayed on the secondary document.



Stapling Documents with the Stapler Icon

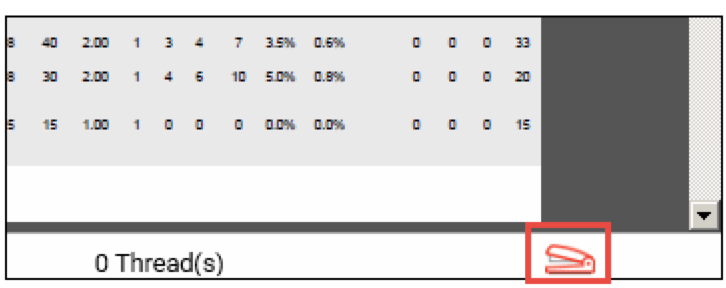
The following steps describe how to staple documents using the stapler icon, which is only available in the HTML Web Client and for certain document types (such as OLE documents or E-Forms) in the ActiveX Web Client.

1. Open the initial document to which other documents will be stapled.
2. Open the secondary document(s) that you want to staple to the initial document.

Note: To staple documents, you must have both images open in separate Document Viewer windows. If you are working with documents in the Web Client, you can right-click a document from a Document Search Results list and select **Open in New Window**.

---

3. Click and drag the stapler icon (located in the status bar) from each secondary document onto to the primary document.



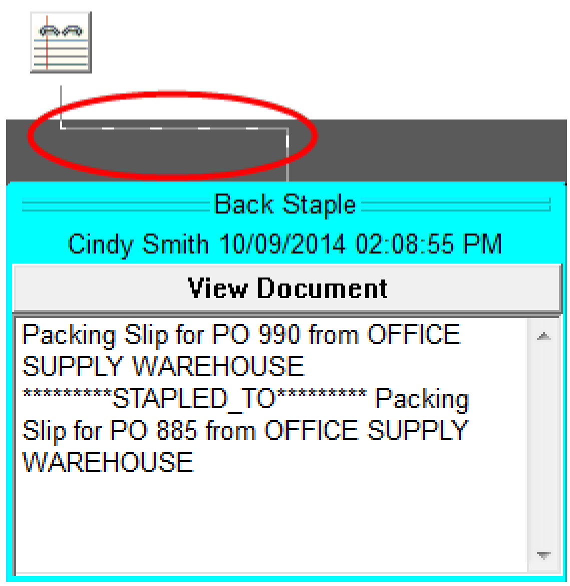
An icon indicating that the document has been stapled is displayed on all associated documents.

Viewing Stapled Documents

Staple notes are displayed at the bottom of the Document Viewer window as note tabs. A Staple note tab indicates whether the document is the primary document or the secondary document by labeling the note as **Staple** or **Back Staple**, respectively.

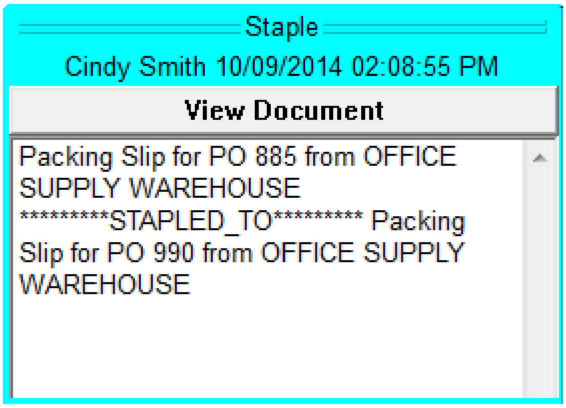
Note: Note labels may vary depending on the Auto-Naming conventions for your system.

When the note is open, a dotted line connects the Staple note tab to the Staple note icon on the document.



To view stapled documents:

1. Click the Staple note tab at the bottom of the Document Viewer window. In the HTML Web Client, double-click the staple note icon on the document. The note window is displayed:



   Staple notes can also be accessed via the **Notes** dialog box.
2. Click the **View Document** button to open the document stapled to the current document.

Moving Staple Notes

To move the Staple note icon on the document, click and drag the icon to the proper place. The new position of the Staple note icon is automatically saved.

Editing Staples

1. Click the Staple note tab at the bottom of the Document Viewer window. The note window is displayed.

   In the HTML Web Client, double-click the staple note icon on the document, or edit the note from within the Notes dialog box.
2. Edit or add any text as needed.

Deleting a Staple

1. Right-click on the staple status bar and select **Delete Note**.

   In the HTML Web Client, select the staple note within the Notes dialog box.

   You are asked if you are sure you want to delete the note.
2. Click **Yes**. The staple is removed.

Note: If you delete a staple on one document, the corresponding staple on the document that was attached to the deleted staple is still displayed. If you do not want the staple on the corresponding document, you must delete it also.

Importing Documents

You can use the Web Client to import documents to OnBase.

Note: Unless otherwise noted, OnBase does not support the import of files larger than 2 GB.

Document import consists of a two-stage process. Users either browse to a file location and select a file to import, or users can drag and drop a file onto the document import screen. The document is held in an imported Document Queue while Document Type and Keyword information is added. Once the necessary information is entered, the document can be imported into OnBase. Depending on your configuration settings, you can also preview image files for easier indexing.

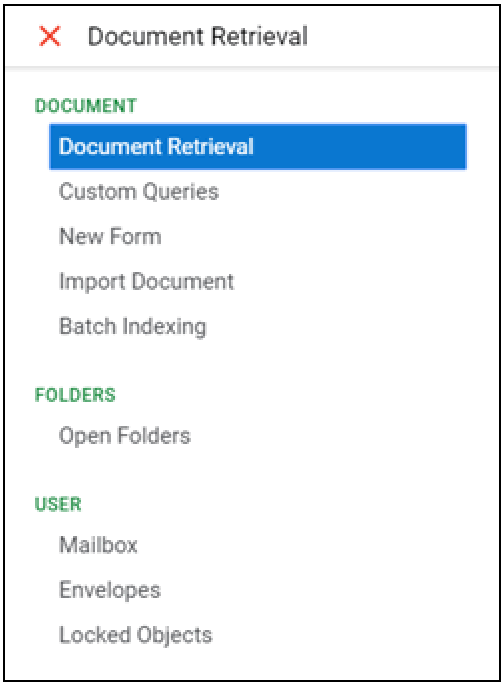
Note: Some Document Types are configured to require Keyword Values to be entered in order to create and/or retrieve documents. Required Keyword Values are displayed in red for these operations, which may include the following: Document Retrieval, importing, indexing, re-indexing, viewing or modifying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

When importing documents in the Web Client, consider the following:

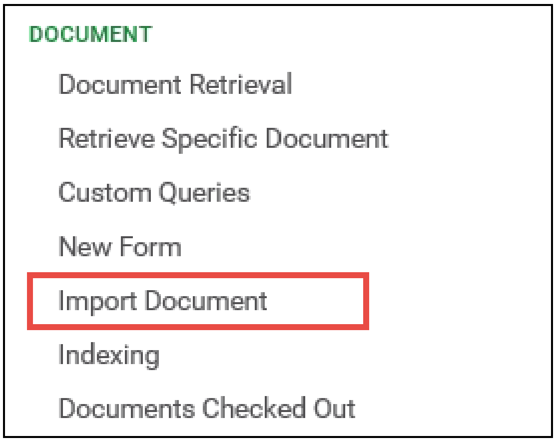
- As .dotm and .dotx files are Microsoft Word templates, modified versions are automatically saved to OnBase as new documents. If this is not the intended behavior, the files should be saved as .docx or .doc files before importing them into OnBase.
- Importing AFP files is not supported in the Web Client. For more information, see the **AFP Input Filter** module reference guide.

To import documents:

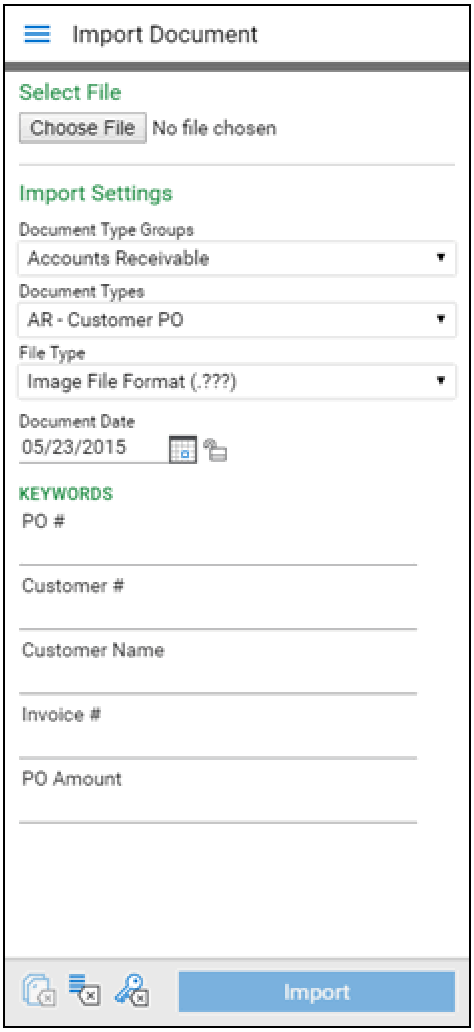
1. Select the Main Menu button. The Menu list is displayed.



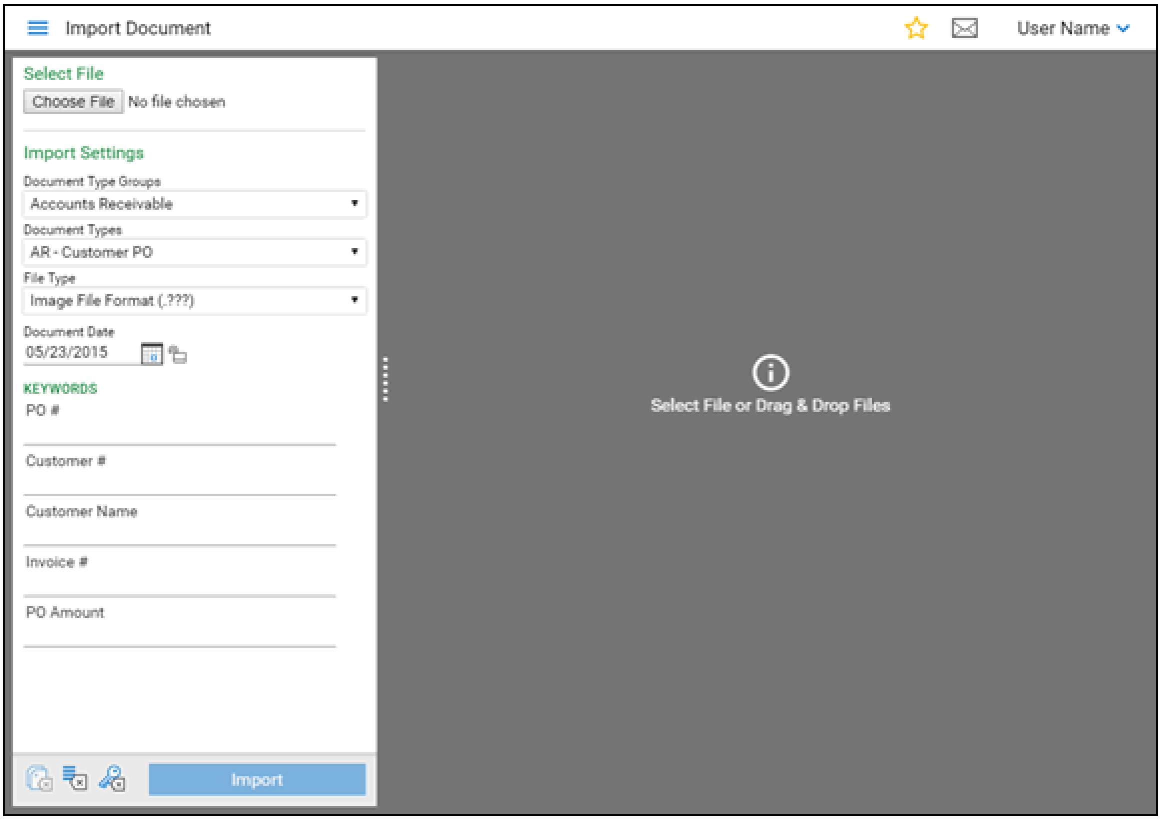
2. Select **Import Document** from the Document section.



The **Import Document** panel is displayed.



3. Do one of the following:
   - In the **Select File** field, identify the full file path for the document you are importing. Click the **Browse** button and browse to the file location.
   - Drag and drop a file onto the Import Document screen.



Note: If OnBase can correlate the file extension to a file type (format), it will automatically select that file type in the **File Type** field. For example, if you import a file whose extension is .doc, OnBase will select **Microsoft Word document (.doc)**.

The selected file is added to the **Document Queue** list on the **Import Document** screen.

4. Select the **Show Preview** option to preview the document being imported. Only previews of image files are displayed. Previews are not displayed for PDF documents larger than 100 MB.

Note: This option is only available if it has been configured by your system administrator.

5. Select the **Initiate Workflow** option to add this new document to Workflow.

Note: This option is only available if your system is licensed for Workflow, the Document Type is part of an existing life cycle, and the Document Type is not configured to automatically initiate Workflow when a document is imported.

6. From the **Document Type Group** drop-down list, select the Document Type Group to assign the document to. (The list includes all Document Type Groups to which you have user import rights. These rights are granted by your system administrator.)
7. From the **Document Type** drop-down list, select the Document Type to assign the document to. (The list includes all Document Types to which you have user import rights. These rights are granted by your system administrator.)

   When you select a Document Type, OnBase automatically displays fields for Keyword Types that are used to index documents of that type.
8. If a file type has not already been selected, select the appropriate type from the **File Type** drop-down list.

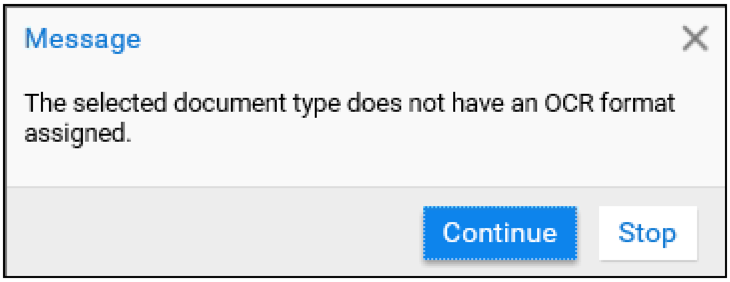
   Note the following:
   - Depending on your system configuration, only certain file types may be available.
   - Documents with a file format of Electronic Form cannot be imported.

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

9. Select the **Queue for Full-Page OCR** option to add documents to the OCR queue upon import.

Note: This option is only available if your system is set up for OCR. See your system administrator for more information.

   If you select the option to enable this feature, depending on the Document Type OCR format, one of the following occurs:
   - If your Document Type format is configured to be No Full-Page OCR Format, when the document import occurs, a message box is displayed indicating that the document you are importing does not have an OCR format assigned.

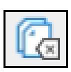
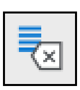


     Click **Continue** to proceed with the import process, or click **Stop** to cancel the import process.
   - If your Document Type is configured to be <Default> or any other option, the import proceeds as expected.
10. Select the **Document Date**. To retain the selected date for future uploads, click the lock button next to the calendar. The selected date is retained until you click the lock button again to unlock it, or until you log off of OnBase.

11. Type Keyword Values in the Keyword Type fields. Note the following:
    - Depending on your system's configuration, some values may be provided by default. Other Keyword Types may be configured as read-only, preventing you from indexing the document with a value for that Keyword Type. If the Keyword Type name is displayed in red, a Keyword Value is required.
    - If you select a different Document Type during import, entered Keyword Values for common Keyword Types are retained. For example, you enter a Keyword Value for the **City** Keyword Type and switch to a different Document Type also containing the **City** Keyword Type. The entered **City** Keyword Value is retained. This logic does not apply to Default Keyword Values. Default values for common Keyword Types are either updated or cleared when selecting a different Document Type during import, depending on whether the selected Document Type has default values for those Keyword Types.

Note: You can include special characters (such as ñ, å, etc.) in Keyword Values.

12. If you make a mistake, use the following buttons available at the bottom of the **Import Document** pane to clear the current indexing values.

Button	Description
	**Clear Imported Documents**: Click to clear the list of imported documents in the Document Queue.
	**Clear All**: Click to reset all indexing fields except for the file name, which retains the name of the file.
	**Clear Keywords**: Click to reset all Keyword Type fields.

13. If you are importing multiple documents, repeat the previous steps to add more documents to the import queue. The number of additional documents that you can add is listed in the **Select File** pane.

Note: Your system must be licensed for EDM Services to import multiple documents at one time.

To switch between documents, select a document from the **Document Queue**.

14. Click the **Import** button in the toolbar at the bottom of the panel. The Web Client imports the document to OnBase. If more information is needed to complete the import, a message displays the appropriate instructions.
    - Depending on how the Document Type is configured, or if the imported document is a revision you may be prompted to enter a comment.
    - You may be presented with additional options if you are importing a rendition of a document. For more information, see Importing Renditions on page 152.

- When the import is complete, a confirmation message is displayed next to the document in the **Document Queue**.

Note: Before importing the document, OnBase checks its file size against the maximum size allowed for imports. If the document is too large, you are notified that the import failed.

If you receive an **Import Failed** message, contact your system administrator.

Appending Pages to an Existing Document

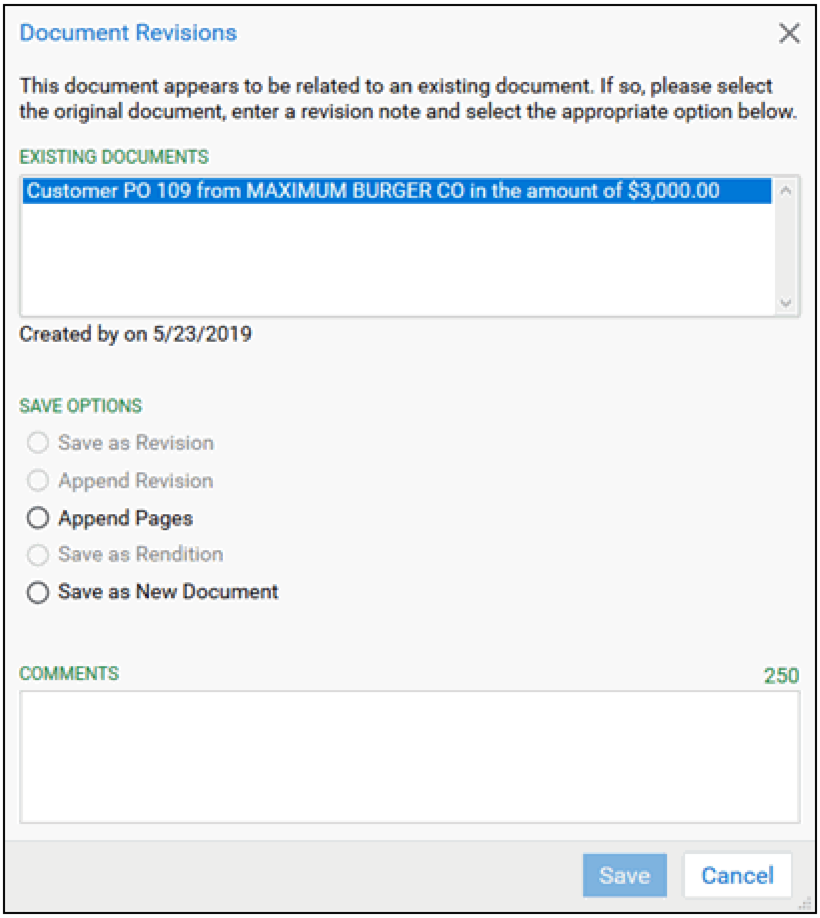
Depending on your configuration, during the import process, you can append a file to an existing document in the same Document Type with the same File Type and Keyword Values. The target Document Type must be configured to allow appending pages on import.

For Document Types with a default file format of Image File Format, when you import a document that has the same indexing information as another document already residing in OnBase, the **Document Revisions** dialog box is displayed. From this dialog box, you can either append the document to an existing document, or you can save the document as a new document in OnBase.

Note: Depending on your configuration, the **Document Revisions** dialog box may also be displayed when you attempt to import a document with the same indexing information as another document and that Document Type is configured to be revisable. Additional options may be available on the **Document Revisions** dialog box for revisable documents. For more information, see the section on importing a revision in the **EDM Services** documentation.

To append an imported document to an existing document:

1. Import a document with the same indexing information as an existing document already residing in OnBase. Upon clicking **Import**, the **Document Revisions** dialog box is displayed.



2. Select the target document from the list of existing documents.
3. Select one of the following options:

Note: If the target Document Type is configured to be revisable, additional options are available. For more information on these options, see the section on importing a revision in the **EDM Services** documentation.

Button	Description
Append Pages	Appends the imported document to the existing document in OnBase.

Button	Description
Save as New Document	Saves the imported document as a new document in OnBase, separate from the existing document. **Note:** Selecting this option creates two documents in OnBase with the same indexing information (the imported document and the existing document).

4. Click **Save**.

Indexing Batches

From the Web Client, you can index batches of documents that have been imported into OnBase. Batch import methods include Document Imaging, Document Import Processor (DIP), and Disconnected Scanning, among others.

Note: These batch import methods require separate licensing, installation, and configuration. For more information about these modules, refer to each module's Help files or contact your system administrator.

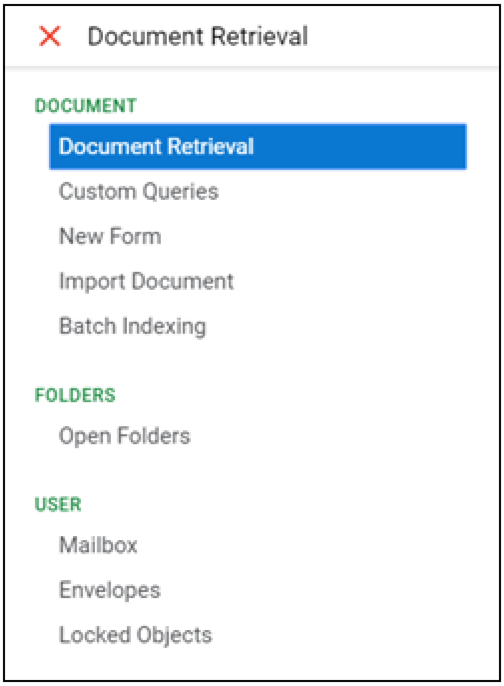
Accessing the Indexing Panel

The **Indexing** panel lets you view and index batches of documents. If you have appropriate privileges and your system is set up to allow Web Client indexing, then **Batch Indexing** is available from the **Document** section of the Main Menu.

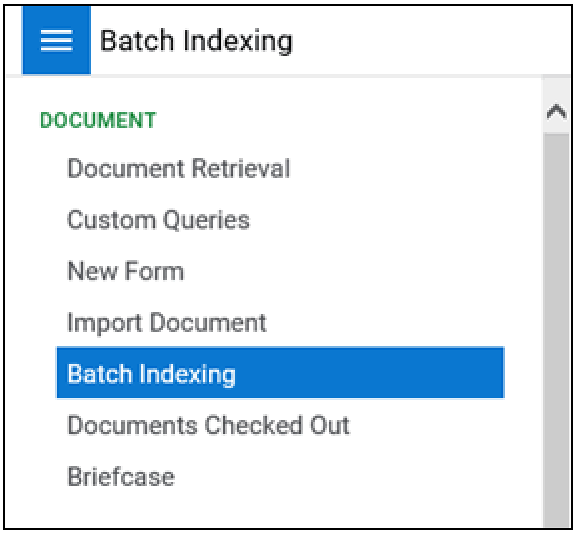
Note: For more information on scanning documents, see the Document Imaging reference guide or help files.

To open the **Indexing** panel:

1. Select the Main Menu button. The Menu list is displayed.

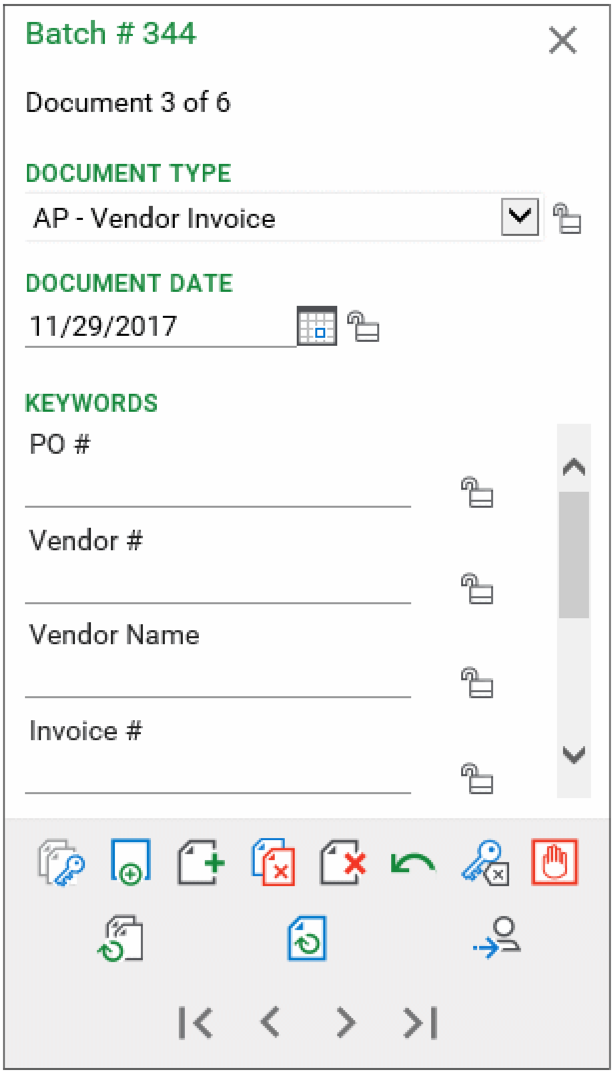


2. Select **Batch Indexing** from the Document section.

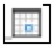


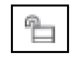
Indexing Panel Overview

An Indexing panel like the one shown below is displayed during indexing. The documents to index are displayed in a separate Document Viewer window.



The following controls are available when you index a batch:

Option	Description
Document Type	The **Document Type** drop-down list allows you to choose the Document Type for the current image. You must select a Document Type from the drop-down before continuing, unless the selected batch has been configured to have a Default Document Type. Users may override the default or previous value to select a different Document Type. Depending on the queue's configuration, a document may receive the Document Type of the document that was indexed before it as its Default Document Type. When a Document Type is selected, the lower part of the panel populates with the Keyword Values assigned to that Document Type.
Document Date	Enter the date you want to associate with the document you are indexing in the **Document Date** field. This date is used in the **Document Retrieval** dialog box and other dialog boxes to find the document by date. Click the calendar button to the right of the **Document Date** field for a selection calendar. 
Reverse AutoFill Keyword Set Lookups	If any Reverse AutoFill Keyword Set Lookup items are associated with the selected Document Type, you can use secondary Keywords to search for an AutoFill Keyword Set during indexing. This is useful when the primary Keyword of the AutoFill Keyword Set is not known. When a single reverse lookup item has been configured for a scan queue, a button is displayed below the **Document Date** field. When multiple reverse lookup items have been configured for a scan queue, a drop-down list is displayed below the **Document Date** field. Use the drop-down list or button to open a search dialog, enter any known Keyword Values to find the associated AutoFill Keyword Set(s), and apply the desired AutoFill Keyword Set(s) to the Indexing panel.
Keywords	Once the Document Type has been selected, the Keyword Types (names and fields) for that document are displayed. If an ellipsis (**...**) follows the Keyword Type field, drop-down selections are available.

Option	Description
Lock	The lock button next to the **Document Type** field, the **Document Date** field, and each of the Keyword Type fields allows you to lock that field's current value so that it cannot be changed.  When the current page is indexed, the locked field holds the value from the previous document. If the Document Type is changed using the **Document Type** drop-down list, and if a locked Keyword Type field is associated with the new Document Type, the value remains in the Keyword Type field in the new Document Type. To change the value in a locked field, click the lock again and type a new value. **Note:** If a Primary Keyword Value for an AutoFill Keyword Set is locked/unlocked, the Secondary Keyword Values will also be locked/unlocked. **Note:** If a default Keyword Value is changed and then locked during indexing, a second instance of the Keyword Type with the default Keyword Value is added. **Note:** When using Keyword Value locks, there can be undesired results when changing the Document Type. A different Document Type may share the same Keyword Types, but the Keyword Values can be stored on the second Document Type in a different Keyword Type storage structure. When switching between Keyword Type structures (e.g., a Document Type assigned a Multi-Instance Keyword Type Group (MIKTG) to a Document Type not assigned a MIKTG, and back again,) this may result in the Multi-Instance Keyword Type Group Values being re-ordered in the Indexing panel. This is expected behavior since the alteration of the method of storage from a MIKTG to regular Keyword Type fields cannot retain the relationship information between the values originally imposed with the MIKTG. For this reason, switching between Keyword Type structures is not recommended. **Note:** When you lock the **Document Date** field, the locked date is saved on the user's workstation and persists until either the date is unlocked or the user logs off of OnBase.

Note: To enter multiple values for the same Keyword Type, click the Keyword Type name to create another Keyword Type field. This option is not available if the Document Type that the document is being indexed into is associated with a Single-Instance Keyword Type Group. However, you can enter multiple values for a Keyword Type in a Multi-Instance Keyword Type Group.

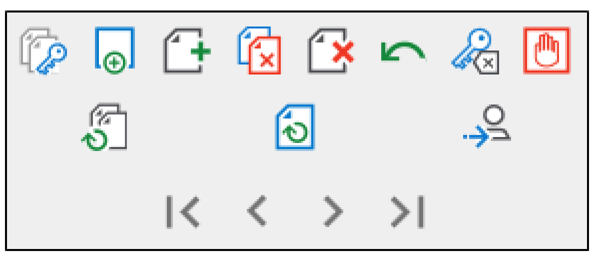
Indexing Toolbar Options

The indexing toolbar is located along the bottom of the Indexing panel.

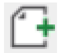
The indexing toolbar contains the buttons necessary to navigate among the documents within the batch and to manage the indexing process:

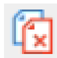
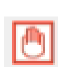
Note: In the table, the term 'unindexed document' means any document that was not indexed before you began indexing the current batch or before you last clicked the **Index Documents** button.

Note: Depending on your configuration, some of the buttons in the indexing toolbar might not be available.



Icon	Description
	The **Index Documents** button saves all indexing information provided during the current indexing session, or since the last time indexing information was saved. Once you index a document using this button, the document is no longer available to be indexed within the Indexing panel.
	The **Append Pages** button appends the current document to the last, previously-indexed document. This option is available only when indexing image documents.

Icon	Description
	**Note:** The **Create New Document** button is disabled for documents with non-image file formats (e.g., PDF, OLE, etc.). The **Create New Document** button creates a new document from the currently displayed page in the document. The new document consists of the currently displayed page as its starting page followed by additional pages from the original document. **Note:** Depending on your configuration, you may not be able to create a new document beginning with the first page of the current document. For example, if you had a five-page document, you could elect to create a new document from pages 3-5. To create a new document during indexing, select the page you wish to be the start of your new document (page 3) and click the **Create New Document** button. Depending on your configuration, clicking the **Create New Document** button does one of the following: • Displays the **Create New Document** dialog box, which allows you to set additional options (e.g., a page range) before the new document is created. • Immediately creates the new document, using the currently displayed page as the starting page followed by all subsequent pages from the original document. If the **Create New Document** dialog box is displayed, do the following: • From the **Document Type** drop-down list, select the appropriate Document Type for the new document. • Enter or verify the **Document Date**. • In the **Create from pages** field, enter the page range for the pages you wish to use to create a new document (e.g., to create a new document using pages 3, 4, 5, and 9 of the original document, enter **3-5,9**). • Enter the appropriate Keyword Values. • Click **OK**. If the **Create New Document** dialog box is not displayed, the newly created document is displayed for indexing and the document from which it is created is moved to the end of the batch for indexing purposes.

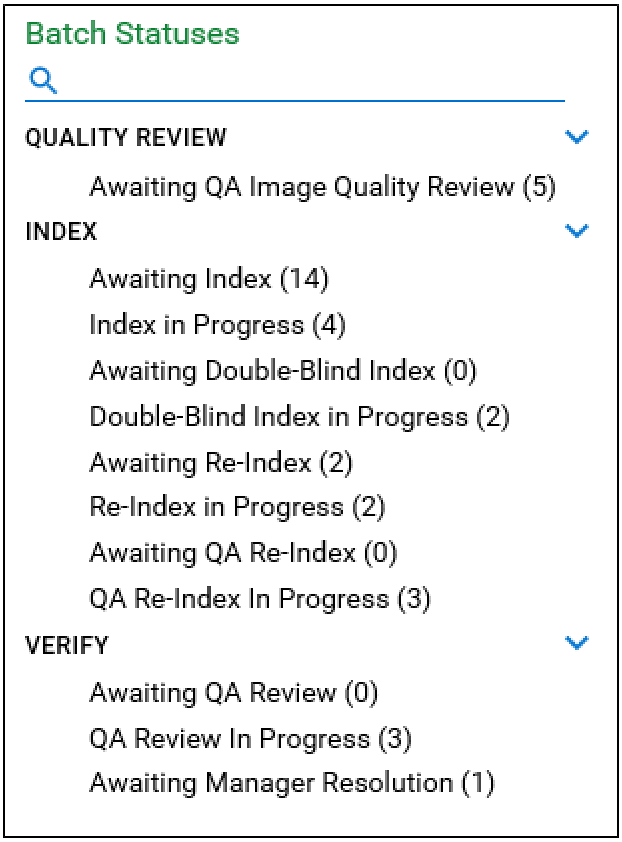
Icon	Description
	The **Delete Page** button deletes the currently displayed page from the selected document. **Note:** This button is not available for single-page documents. To delete a single-page document, click **Delete Document**. **Note:** If you delete all pages from all documents in the batch, the batch is purged from OnBase.
	The **Delete Document** button deletes the current document. **Note:** Depending on your scan queue configuration, you may or may not be able to delete the current document. **Note:** If you delete all documents in the batch, the batch is purged from OnBase.
	The **Undo** button allows you to cancel your last deletion or append operation. To cancel an append, click the **Undo** button immediately after clicking the **Append Pages** button. The Undo option is not available once a new document has been indexed or navigated through. **Note:** If you delete the last document in a batch, or append the last document, you receive the following message: **You have indexed all documents in the batch and your last action(s) may be undone. Click Stop Indexing to complete the indexing process for this batch and move onto another batch.**
	The **Clear Keywords** button clears the Keyword Values from their fields. Locked fields are not cleared.
	The **Stop Indexing** button closes the open document, re-displays the list of batches, and discards any indexing information provided since the last time indexing information was saved. All Keyword Value information is removed from the Indexing panel and the **Document Type** field is cleared. The same queue remains selected in the Indexing panel, but the batch is deselected in the list.
	The **Mark Document for Rescan** button marks the current document for rescanning. When you are finished indexing the batch, it will be routed to the **Awaiting QA Rescan** batch status queue.

Icon	Description
	The **Mark Page for Rescan** button marks the current page for rescanning. When you are finished indexing the batch, it will be routed to the **Awaiting QA Rescan** batch status queue.
	The **Manager Resolution** button marks the current document for manager resolution. When you are finished indexing the batch, it will be routed to the **Awaiting Manager Resolution** batch status queue.
	The **First Document** button displays the first unindexed document in the batch, if it is not already being displayed.
	The **Previous Document** button displays the previous unindexed document in the batch, if it is not already being displayed.
	The **Next Document** button displays the first page of the next unindexed document in the batch, if there is one.
	The **Last Document** button displays the first page of the last unindexed document in the batch you are indexing.

Indexing Batches

To index batches in the Web Client:

1. From the Main Menu’s **Document** section, click **Batch Indexing**. The **Batch Statuses** panel is displayed.



   Indexing begins in the **Awaiting Index** batch status queue, where the documents are placed when they are first brought into the system. Once any documents in a batch have been indexed, the whole batch is moved to the **Index in Progress** batch status queue.

   Double-blind indexing allows an additional indexer to re-enter index values as a verification step to prevent errors during manual indexing. If your system is configured for double-blind indexing, then there are two additional batch status queues, **Awaiting Double-Blind Index** and **Double-Blind Index in Progress**. These queues hold documents that will be re-indexed by the second indexer.

2. Select one of the following batch status queues:
   - **Awaiting Index**. Contains batches with only unindexed documents.
   - **Index in Progress**. Contains batches with some indexed documents and some unindexed documents. These batches have been imported and partially indexed, but are not yet committed.

   All the batches with the selected batch status queue are listed. Each listing includes the following information:
   - The name of the queue where the batch is currently located
   - The batch number assigned to the batch

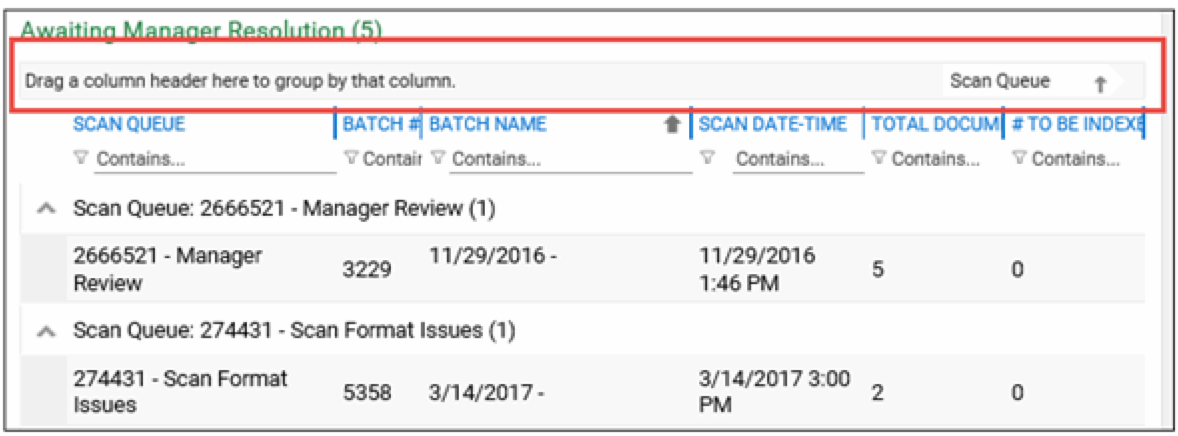
- The name of the batch (initially defaults to the date the batch was brought into the system and the user name of the user who imported them, but may have been changed by the user)
- The date and time that the batch was created
- The total number of documents within the batch
- The number of documents in the batch that have not yet been indexed

---

Tip: To sort the list of batches according to one of the categories of information listed above, click the corresponding column's header. To toggle ascending/descending sorting order, click the column's header again. To resize the list window, grab and drag the bottom border accordingly.

---

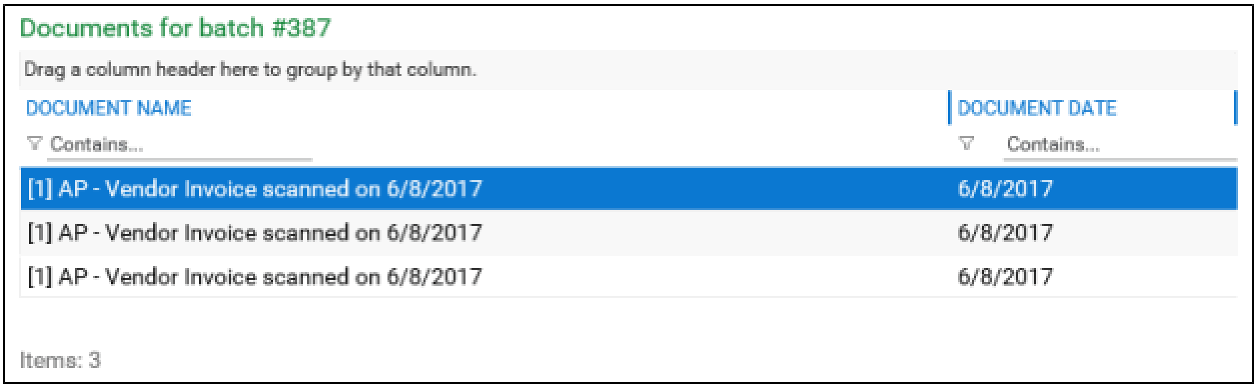
3. To filter the batch list according to any of the categories listed below, drag the column name header to the **Drag a column header here to group by that column** section.



You can filter the batch list according to any of the following categories:

- **Scan Queue**
- **Batch #**
- **Batch Name**
- **Scan Date-Time**
- **Total Documents**
- **# To Be Indexed**

4. To see more information about a batch, double-click it. The **Select Document** window is displayed, listing each of the documents in the batch.



You can filter the document list according to any of the following categories:

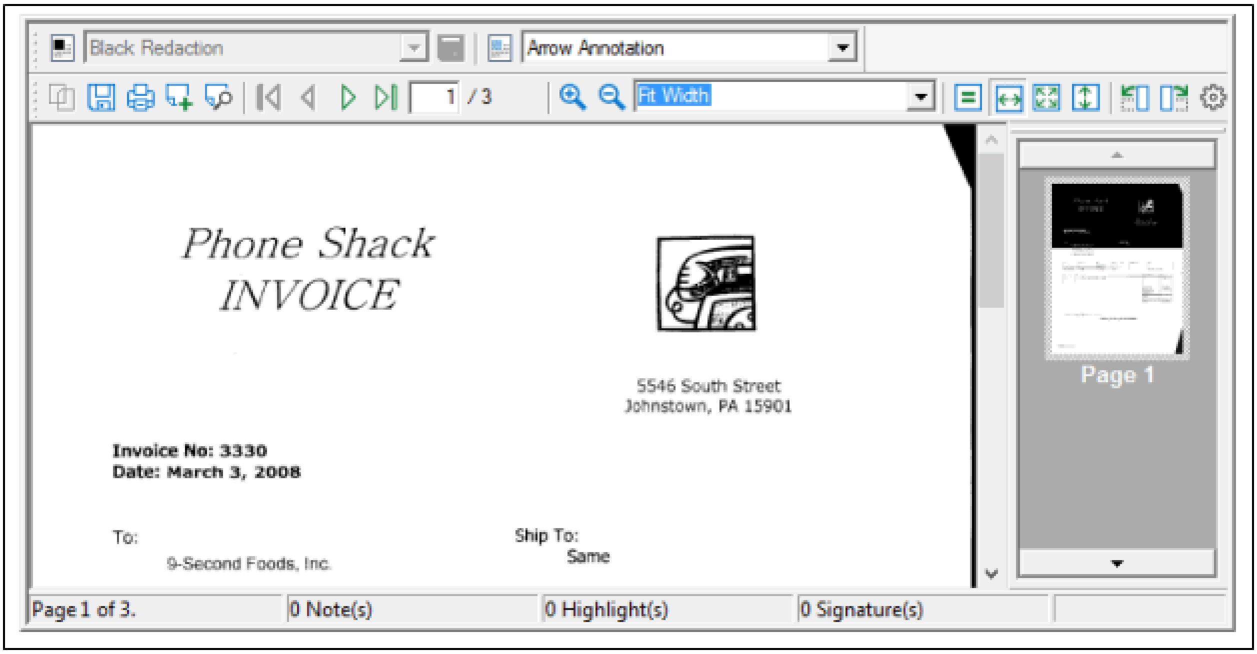
- **Document Name**
- **Document Date**

Note: Any document which has not yet been at least partially indexed is listed simply as **Unindexed Document**.

---

5. To view a document, double-click its listing. It is displayed in the **Select Document** window, below the list of documents residing in the batch.

Note: A document cannot be indexed when it is opened this way.



When you are finished viewing and/or editing a document, you can view another document in the batch by double-clicking its listing. When you are finished examining the documents, close the **Select Document** window or minimize it by clicking anywhere outside of it.

6. From the list of batches in the selected batch status queue, right-click on the batch you want to index and select **Index Documents**.

   This retrieves the batch and opens the Document Viewer, which displays the first unindexed document in the batch. Choosing **Index Documents** also expands the indexing status option selected in Step 2 to show the batch name of the batch to be indexed, and makes two of the navigation buttons in the indexing toolbar available.

7. In the **Document Type** field, select the Document Type for the document.

   This makes the **Document Date** field available for editing, and displays the fields for the Keyword Types associated with the selected Document Type.

   The lock button next to the **Document Type** field, the **Document Date** field, and each of the Keyword Type fields allows you to lock that field's current value so that it cannot be changed. When the current page is indexed, the locked field holds the value from the previous document.

   If the Document Type is changed using the **Document Type** drop-down list, and if a locked Keyword Type field is associated with the new Document Type, the value remains in the Keyword Type field in the new Document Type. To change the value in a locked field, click the lock again and type a new value.

Note: If a Primary Keyword Value for an AutoFill Keyword Set is locked/unlocked, the Secondary Keyword Values will also be locked/unlocked.

Note: If a default Keyword Value is changed and then locked during indexing, a second instance of the Keyword Type with the default Keyword Value is added.

Note: When using Keyword Value locks, there can be undesired results when changing the Document Type. A different Document Type may share the same Keyword Types, but the Keyword Values can be stored on the second Document Type in a different Keyword Type storage structure. When switching between Keyword Type structures (e.g., a Document Type assigned a Multi-Instance Keyword Type Group (MIKTG) to a Document Type not assigned a MIKTG, and back again,) this may result in the Multi-Instance Keyword Type Group Values being re-ordered in the Indexing panel. This is expected behavior since the alteration of the method of storage from a MIKTG to regular Keyword Type fields cannot retain the relationship information between the values originally imposed with the MIKTG. For this reason, switching between Keyword Type structures is not recommended.

   When you lock the **Document Date** field, the locked date is saved on the user's workstation and persists until either the date is unlocked or the user logs off of OnBase.

Note: Steps 8 and 9 are optional. Only enter as much information as you wish.

8. To change the default Document Date, either edit the date manually in the **Document Date** field, or click the adjacent icon and select a different date from the resulting calendar. A Document Date must be in the format **mm/dd/yyyy**. You can omit leading **0**s (zeros) in the day or month, but you must include all four digits in the year.
9. Insert or edit Keyword Values as desired.

   For more information on indexing with different types of Keywords in the Web Client (for example, AutoFill Keyword Sets, Reverse AutoFill Keyword Set Lookups, or masked Keywords), see the various sections on working with Keywords in the **Web Client** documentation.

10. When you are satisfied with the indexing information, click the **Next Document** button in the indexing toolbar. This adds your indexing information to the document, and opens the next unindexed document in the batch.

    The system automatically skips all previously indexed documents throughout this procedure. For example, if you index a batch with 30 documents, but only the 14th and 22nd documents have not yet been indexed, those two will be the only documents in the batch that you can access using this method. While you have the 14th document open, therefore, only the **Next Document** button and the **Last Document** button are available for navigation, and they both take you to the 22nd document. Conversely, while you have the 22nd document open, only the **Previous Document** button and the **First Document** button are available for navigation, and they both take you to the 14th document.

Tip: The action specification pane keeps the same indexing information until you select a new Document Type. This can speed up the indexing of a batch when some of its documents have the same Document Type and perhaps the same values for some Keyword Types.

Note: Repeat Steps 7 through 9 to index the remaining documents in the batch.

11. When you have finished indexing the batch, click the **Index Documents** button in the indexing toolbar. The system saves the batch to the queue that you retrieved them from.

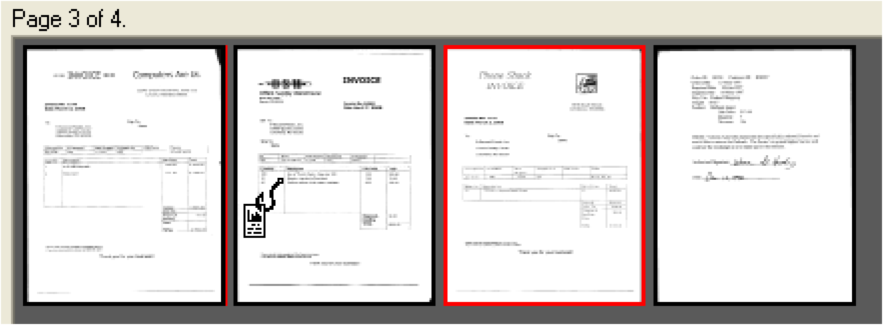
    You can also click the **Index Documents** button when you want to take a break, or whenever there is any other reason to save the indexing you have done so far. However, saving your indexing always saves the batch, so you will need to start over again from Step 2.

Note: When the batch is saved, the system may change its indexing status. For instance, if you index a few of the documents in an **Awaiting Index** batch and then save the batch, the system changes its status to **Index In Progress**.

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

Re-ordering Pages

You can re-order scanned pages by right-clicking a thumbnail and dragging it until a red line appears where you want the page to be repositioned.



Double-Blind Indexing

Your Web Client may be configured to use double-blind indexing to help eliminate indexing errors. In double-blind indexing, one user (the primary indexer) indexes documents in any batch whose status is either **Awaiting Index** or **Index in Progress**. When the primary indexer finishes indexing the batch, its status changes to either **Awaiting Double-Blind Index** or **Double-Blind Index in Progress**. Later, another user (the secondary indexer) independently indexes the same batch, providing Keyword Values without any knowledge of those provided by the primary indexer. Whenever the secondary indexer instructs the system to index a document, the system compares the new Keyword Values with the existing ones, and notifies the secondary indexer of any discrepancies. The secondary indexer can resolve the discrepancies.

Note: To change the batch status to either **Awaiting Double-Blind Index** or **Double-Blind Index in Progress**, the primary indexer must index the entire batch.

Note: The secondary indexer cannot change the Document Type or the Document Date.

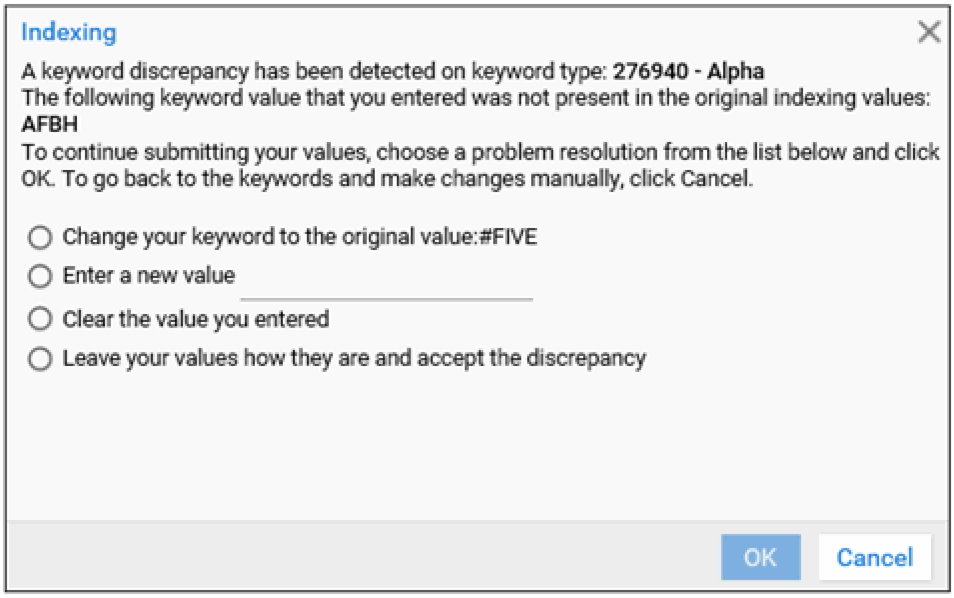
Note: The secondary indexer must enter a value for each required Keyword Type before any Keyword discrepancies can be identified and resolved.

Double-blind indexing can identify two kinds of discrepancies:

- Different values for the same Keyword Type (for example, **Ulysses Grannt** vs. **Ulysses Grant**)
- Different numbers of values for the same Keyword Type (for example, **Ulysses Grant** vs. both **Ulysses Grant** and **Robert Lee**)

Normally, the secondary indexer should click the **Index Documents** button after indexing each document, so that the document is still open for reference.

The following example shows what the discrepancy notification looks like if one of the Keyword Values is different:



The secondary indexer can click **Cancel** to return to the Indexing panel and edit Keyword Values manually and then resubmit the document. Alternatively, the secondary indexer can select one of the following options:

Option	Description
Change your keyword to the original value: <original value>	Changes the value to match the value entered by the primary indexer.
Enter a new value	Changes the Keyword Value to the one specified in the adjacent field. The main use for this option is to add a value when the secondary indexer enters fewer values for a Keyword Type than the primary indexer did. However, it can also be used to enter a new value, different from anything entered before. Therefore, it should be used with special care.
Clear the value you entered	Clears the Keyword Value entered by the secondary indexer. This option is mainly for use when the secondary indexer enters more values for a Keyword Type than the primary indexer did. It is unavailable when the secondary indexer has not provided a value for the particular instance of the Keyword Type.
Leave your values how they are and accept the discrepancy	Overwrites the Keyword Value entered by the primary indexer with the value entered by the secondary indexer.

A separate **Indexing** dialog box is displayed for each discrepancy.

As soon as the last discrepancy is resolved, the document is automatically imported into the system. The Document Viewer is closed and the Keyword Type fields in the Indexing panel are cleared.

Double-Blind Indexing with Multi-Instance Keyword Type Groups

Your system can be set up to perform double-blind indexing of documents with Multi-Instance Keyword Type Groups. When a discrepancy occurs in indexing such a document, the system displays a dialog box that lists all of the Keyword Values entered by the primary indexer next to all of the Keyword Values entered by the secondary indexer. This not only enables the secondary indexer can compare all values at the same time, but also makes it much easier to identify the relationships among Keyword Types.

Re-Index Batches

Your Web Client may be configured to send batches for re-indexing as a quality assurance measure to help ensure indexing accuracy. Performing re-indexing is much the same as performing indexing.

To begin re-indexing a batch:

1. From the **Batch Statuses** panel, select one of the following batch status queues:
   - **Awaiting Re-Index:** Contains batches that have not yet undergone the re-indexing process.
   - **Re-Index in Progress:** Contains batches that have been partially re-indexed but not yet committed.

   All batches with the selected batch status queue are listed.
2. From the list of batches in the selected batch status queue, right-click on the batch you want to re-index and select **Re-Index Documents**.

   This retrieves the batch and opens the Document Viewer, which displays the first document in the batch that has not been re-indexed. From here, you can re-index the batch using the same actions used to initially index the batch.

   For more information on standard indexing actions and options, see the batch indexing sections above.

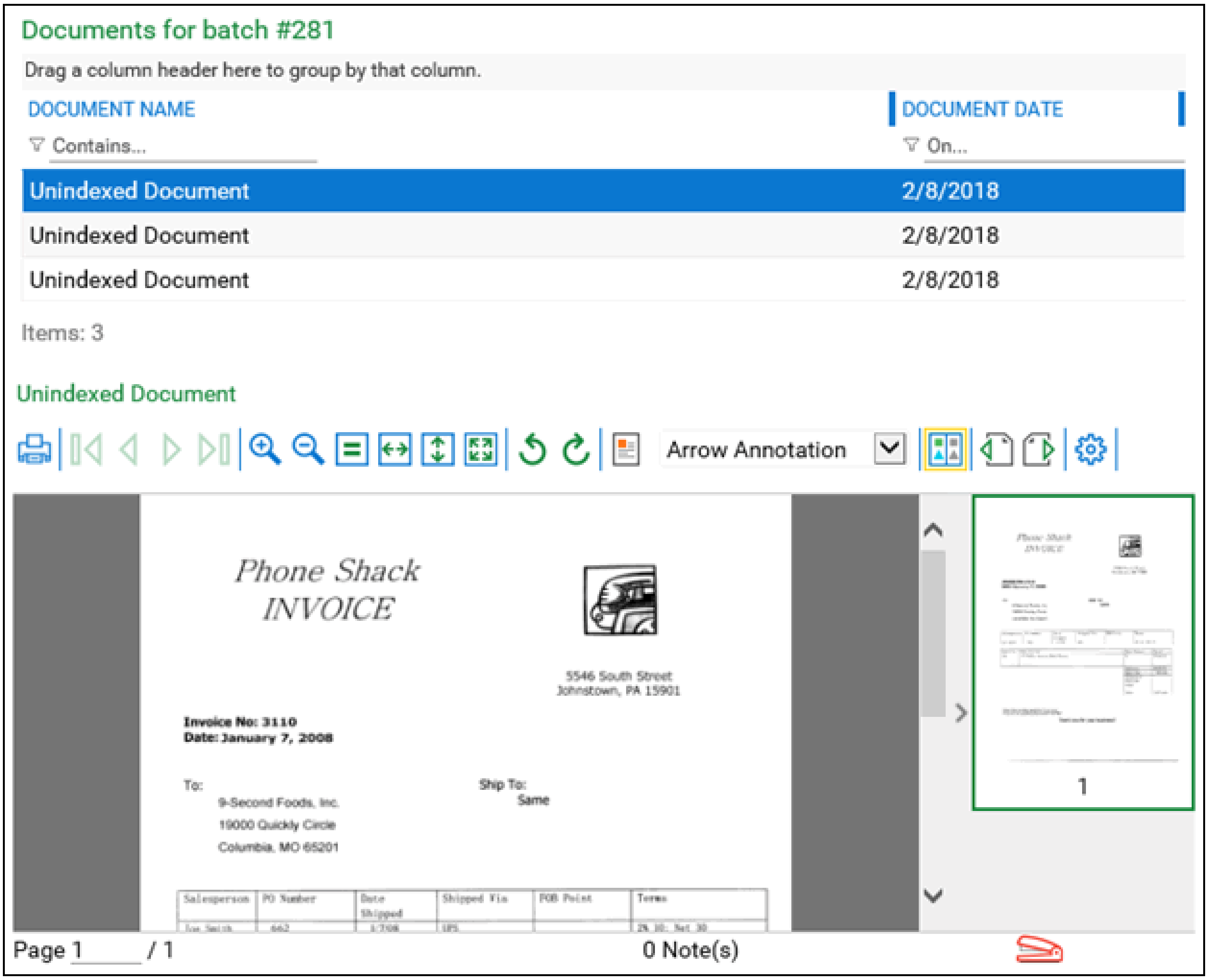
Viewing Documents in a Batch

You can view the documents in a batch outside of the indexing process. Documents are displayed in the Document Viewer; however, the Indexing panel is not displayed and unindexed documents cannot be indexed.

To view documents in a batch, do one of the following:

- Right-click on the batch and select **View Documents**.
- If the batch's associated scan queue is not configured to initiate the work associated with the batch status queue upon double-clicking, double-click the batch.

Once you take either of these actions, the **Select Document** window is displayed, listing all documents in the batch. From this listing, double-click the document you want to view to display it in the Document Viewer below the listing.



Deleting Batches

To delete a batch, right-click on one or more batches and choose **Purge Selected**. Deleting all documents in a batch in the **Awaiting Index** queue will also delete the batch.

Note: Depending on your rights/privileges, you may or may not be able to delete a batch.

Refreshing a Batch Status List

If you are in the **Batches** pane when another user performs an action on a batch (that is, scanning, sweeping, or indexing) or when a scheduled sweep process occurs, you must manually refresh the batch status list to see the changes reflected (that is, batches are added to or removed from the list, batches are routed to another scan queue, the number of scan queues is updated, and so on).

To manually refresh a batch status list, right-click on any batch and select **Refresh List**.

Does Not Exist in the Database

Upon indexing documents, if you receive the following message, you must select a pre-configured Keyword Value from the Data Set in the drop-down list.

[Document Type Name]: [user typed value] does not exist in the database!

To successfully index the document, click **OK** and then select a pre-configured Keyword Value from the Data Set in the drop-down list.

Custom Queries and Text Searching

Along with Document Retrieval, you can locate documents and specific information in OnBase using Custom Queries and External or Internal Text searches. To see the keyboard shortcuts available in Custom Queries mode, see Custom Queries Shortcuts on page 377.

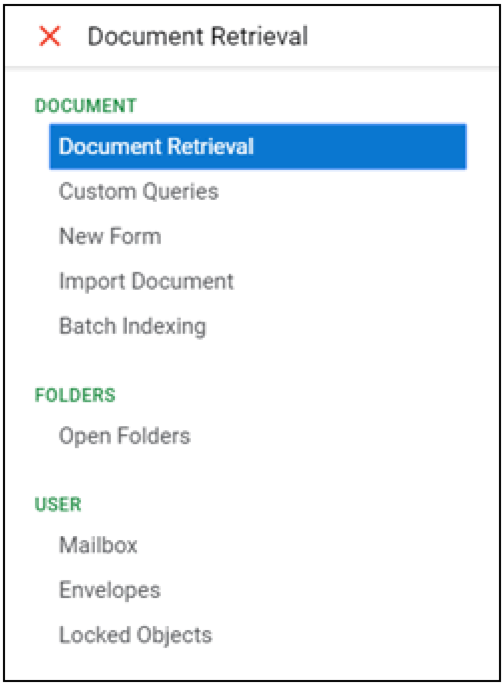
Document Retrieval Using Custom Queries

Custom Queries are queries that have been configured for you by your system administrator, so that you can quickly and easily select the kinds of documents that you most frequently work with.

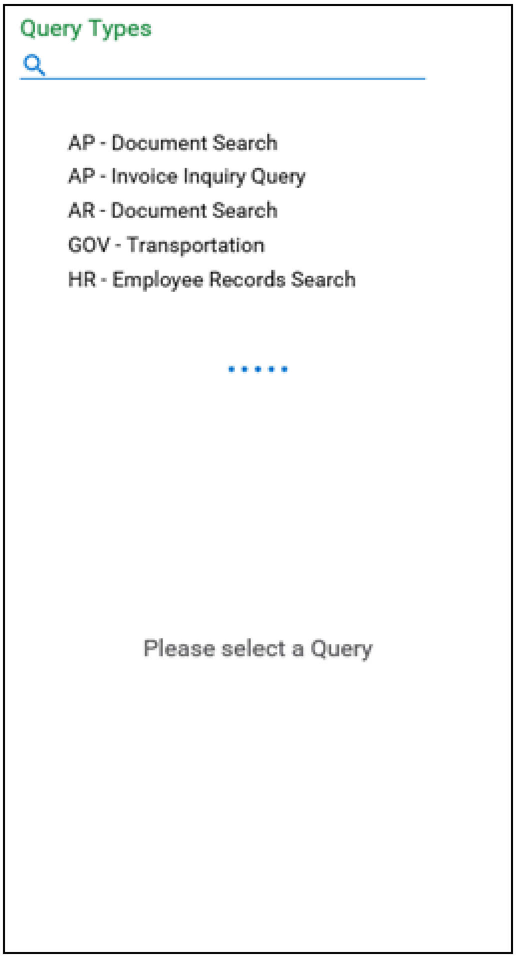
Whenever you conduct a Custom Query, its specifications are automatically recorded in a temporary query history, which is maintained for the duration of your current Web Client session. At any later time in the same session, you can conduct the same query by clicking the **History** button and then selecting the Custom Query from the list in the resulting **Query History** page.

Conducting a Custom Query

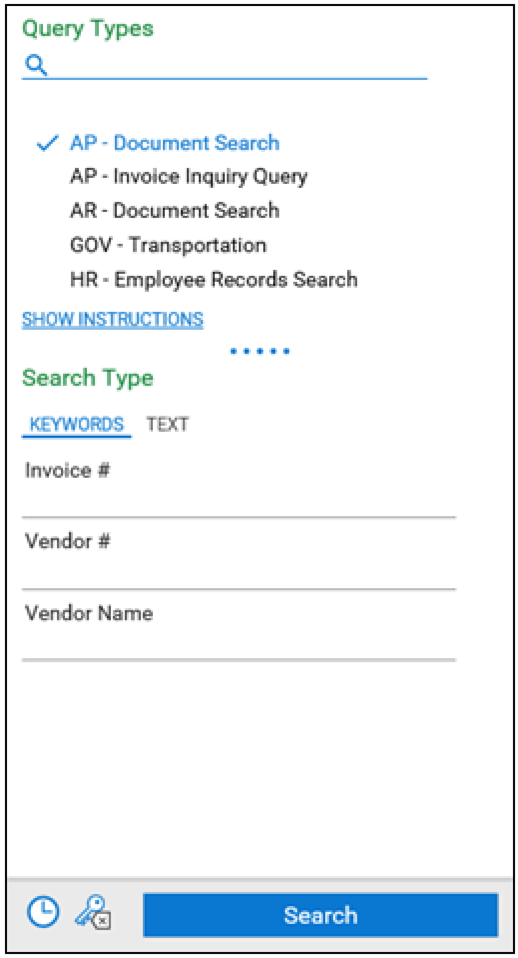
1. Select the **Main Menu** button. The Menu list is displayed.



2. Select **Custom Queries**. The **Query Types** pane is displayed.



3. Select a Custom Query. The Search Types configured for the Custom Query are displayed.

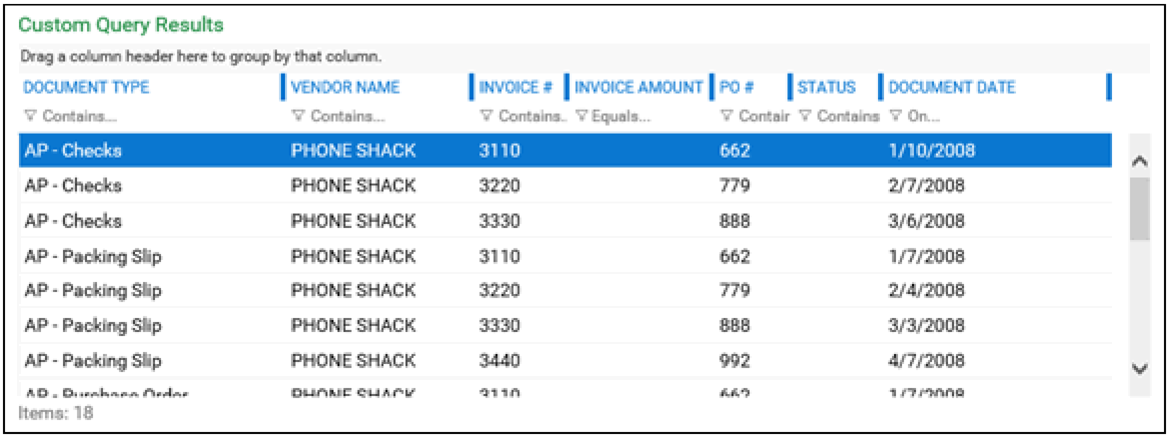


Note: If instructions are available for the selected query, the **Show Instructions** link is displayed. If the link is selected, the link toggles to **Hide Instructions**.

4. Enter search parameters in the fields provided. If there are instructions at the top of the query form, be sure to follow them.
   - If you enter only a **From Date**, all documents from that date forward will be found.
   - If you enter only a **To Date**, all documents from that date backward will be found.
   - If you enter a **From Date** and a **To Date**, all documents within the date range will be found.

Note: You can use all functionality of Keyword Type fields in Custom Queries, including adding additional instances of a Keyword Type, or using Wildcard or Boolean operators to narrow the search. For more information, see Working with Keywords on page 189.

5. Click **Search**. Documents that meet the search criteria are displayed in the Document Search Results list. Your system may be configured to automatically display one of the selected documents in the Document Viewer.



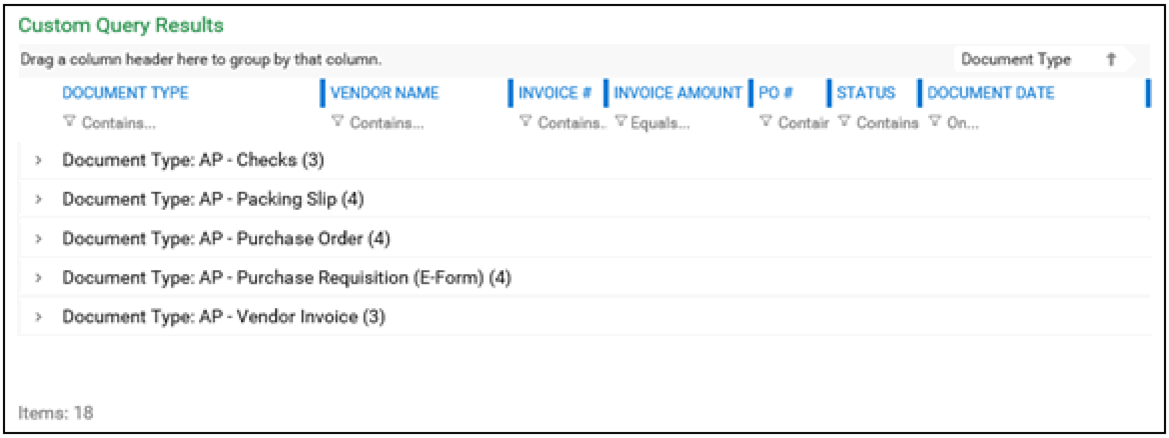
Note the following:

- If a document has more than one value for a Keyword Type that is used as a display column, the document will be listed for each Keyword Type Value.
- If **Note Contents** is used as a display column and multiple notes exist on a document, the document will be listed for each note.

Tip: Click the column header at the top of the list to sort documents by column values. To resize a column to the width of the longest value, double-click the divider to the right of the column name. Column width changes are saved and reflected the next time you use the query.

Note: If you sort by the **Document Date** property, the results will be sorted by both the date and the time the document was imported into the system.

Depending on a Custom Query's configuration, documents that meet the search criteria may be automatically grouped by one of the display columns:

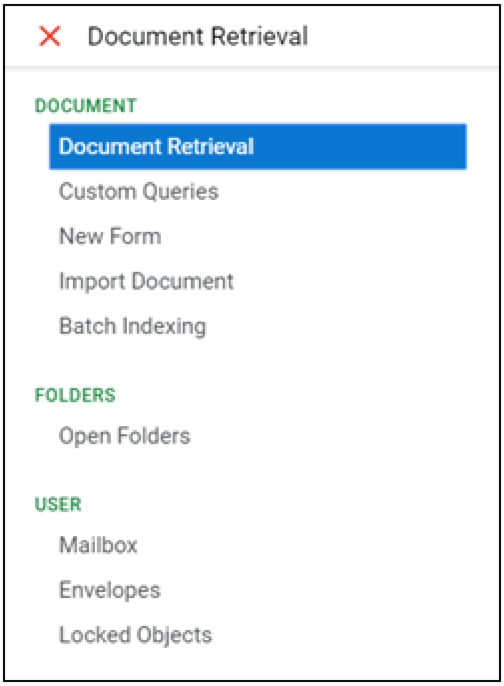


Note: If a Keyword Type that is used as a display column has more than one value for a document, the document is listed for each Keyword Value.

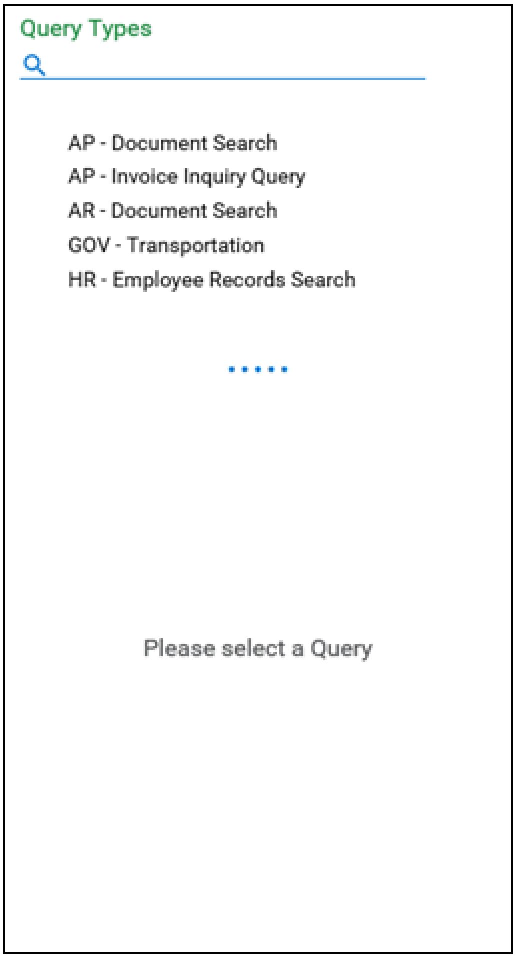
Conducting a Custom Query with a Text Search

If your system administrator configured a Custom Query for text searching, you can search for specific text within document types assigned to the Custom Query.

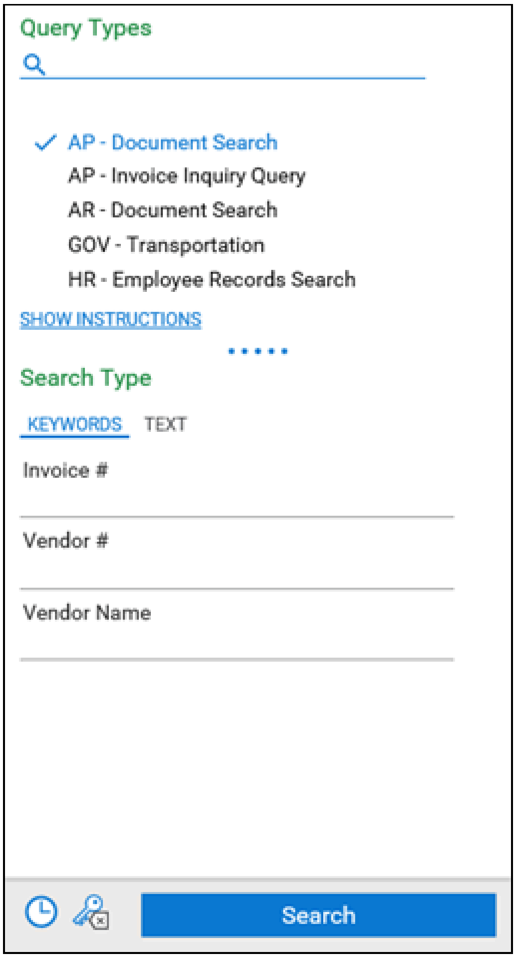
1. Select the **Main Menu** button. The Menu list is displayed.



2. Select **Custom Queries**. The **Query Types** pane is displayed.

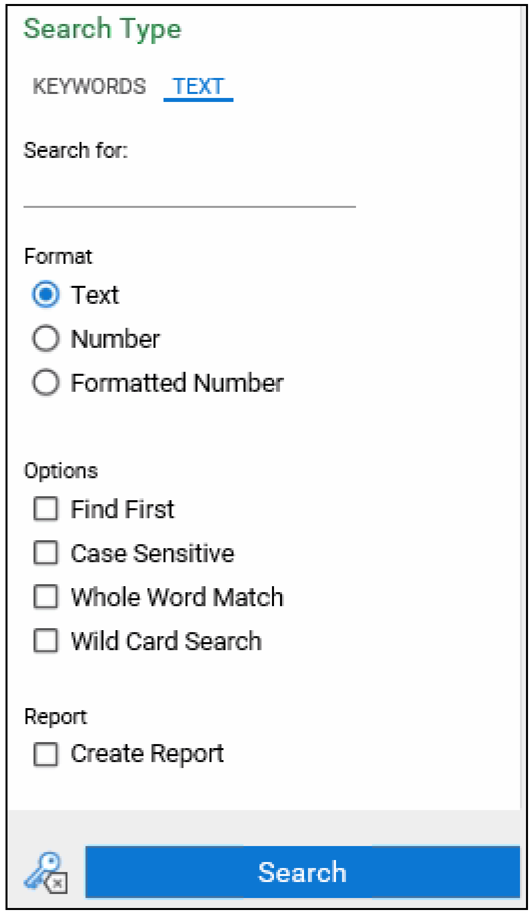


3. Select a Custom Query. The Search Types configured for the custom query are displayed.



Note: If instructions are available for the selected query, the **Show Instructions** link is displayed. If the link is selected, the link toggles to **Hide Instructions**.

4. Click the **Text** tab in the panel. The external text search options are displayed.



5. In the **Search For** field, type the text string you want to search for. The string must contain at least two characters, and at least one character in the string must be a letter or a number.

6. Select a search type.
   - **Text** - Searches for alphanumeric text.
   - **Number** - Searches for numeric values and allows the use of the following operators to limit the search: **=**, **>**, **<**, **=>**, and **<=**. You can use **and**, **or**, and **to** as operators to search for a range of values. For example, type **2008 and 2009** to find documents containing both 2008 and 2009.

Caution: If you are searching for an exact number that is part of an alphanumeric text string, then the number will not be found. For example, if you search for **001** and the actual text is **ABC001**, then the value will not be found.

   - **Formatted Number** - Searches for numeric values that use formatting characters. For example, to search for all Social Security Numbers greater than 800-00-0000, type **> 800-00-0000** in the **Search String** field. You can use this option with following operators to limit your search: **=**, **>**, **<**, **=>**, and **<=**. The **to** operator can also be used to search for a range of values. For example, type **800-00-000 to 900-00-0000** to find documents containing values within this range.

Note: When you search for formatted numbers greater or less than the entered search string, formatted numbers followed by periods are not included in the search results. For example, if the formatted number is the last word in a sentence, then it will be omitted as a result.

7. Select one of the following options if necessary:
   - Select the **Find First** check box to limit the number of hits in each document search to one, which will limit search time. If **Finds First** is not selected, each document is searched until all hits are found.
   - Select the **Case Sensitive** check box to return only matches that have the same capitalization as the text string search criteria.
   - Select the **Whole Word Match** check box to match only a text string that is the exact word (not just merely characters matching the search criteria). If there are any spaces within the text string, the **Whole Word Match** check box will be unavailable.
   - Select the **Wild Card Search** check box to include wild card characters in your text string search criteria.

Note: These options are not available for Number and Formatted Number search types.

8. To generate a report of the text search criteria and results, select the **Create Report** check box. Enter the name of the report in the **Report Description** field. Enter the number of lines of text to show above and below the found text in the **Lines Before** and **Lines After** text fields.

9. Click the **Search** button in the toolbar.

   OnBase displays a Document Search Results list, which provides a link to each page that contains the text string, as well as the number of instances, or hits, per document.

Note: If no documents match your criteria, the Document Retrieval list displays **No documents found**.

10. Click a page number to display that hit in the Document Viewer. To display the hit in a new window, right-click the page number and select **Open in New Window**.

Note: If the selected document is displayed using an image rendition, the hits will not be highlighted on the document. The hits will only be highlighted when the selected document is displayed using a text rendition.

Viewing Folder Type Custom Query Results

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 **Folders** window is opened and 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.

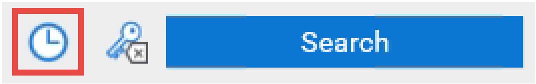
The **Folders** window opened with the folder search results allows you to perform folder-related tasks, such as viewing folder Keyword Values or displaying Folder History.

Viewing Recent Query History

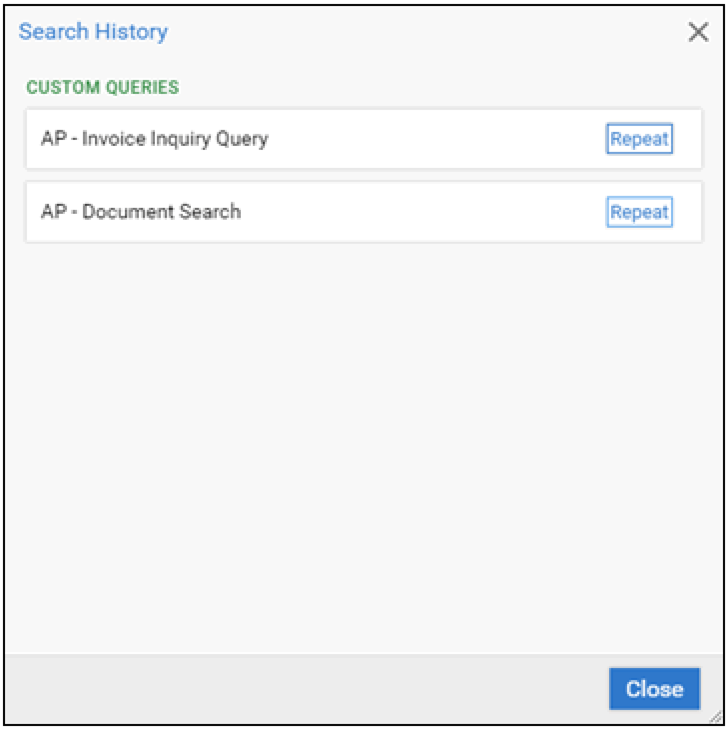
You can use the **Query History** button to display a list of searches performed during the current session, allowing you to repeat a recent search. Depending on your current context, the list displays all Custom Query or Document Retrieval searches made since logon.

To view query history:

1. Click the **Query History** button in the Navigation Panel.



The **Search History** dialog box is displayed.



2. To repeat a previous search, click **Repeat** next to the search title. The results of the search are displayed in the search results list.

Internal Text Search

The Internal Text Search function allows you to locate search text in an open text-based document, including PCL and other plain text documents or ASCII file formats.

See also: External Text Search on page 368.

Internal Text Search Toolbar

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

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

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

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

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

Button	Description
	**Text Search Options** limits your searches to one or more columns (character positions) or to a column index (a predefined text block). You can also specify whether the search should start from the beginning of the document or the current page. For more information, see Limiting Searches Using Text Search Options on page 365.
	**Find Previous** searches for the preceding occurrence of the specified string within the current text document.
	**Find Next** searches for the following occurrence of the specified string within the current text document.

Performing an Internal Text Search

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

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

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

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

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

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

Limiting Searches Using Text Search Options

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

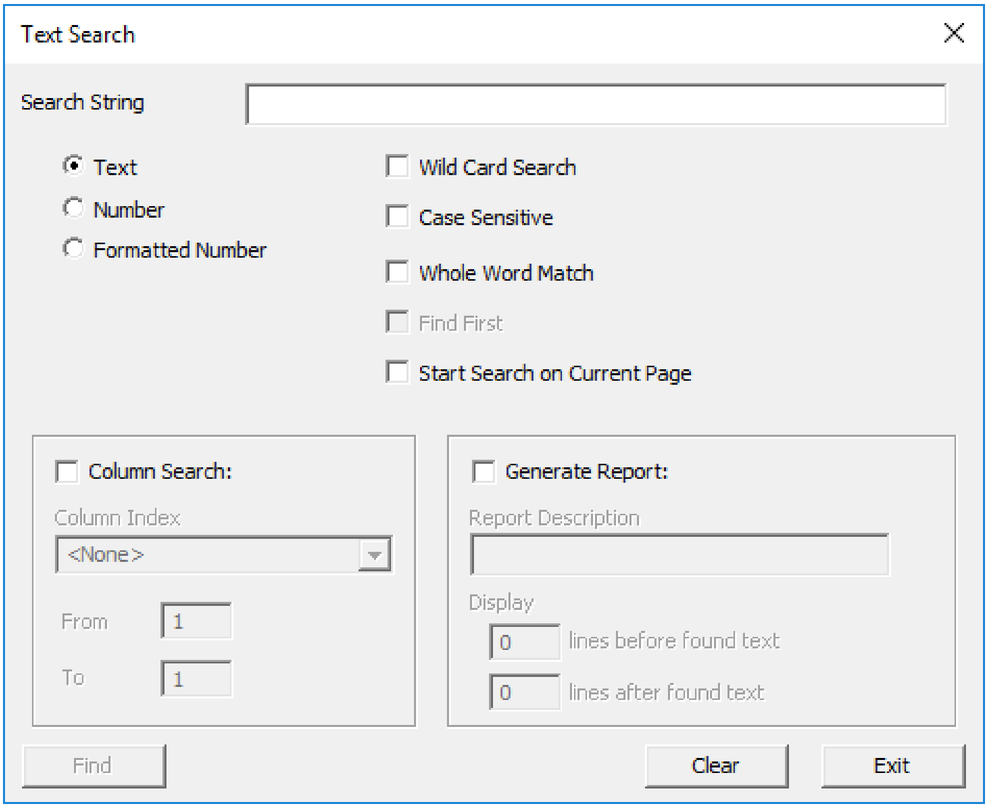
- If you know the string occurs somewhere between the current page and the end of the document, you can apply an option to start the search from the page you are currently viewing.
- If you know that the phrase you're looking for occurs only within a specific set of columns, you can limit the search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

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

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

To perform a search using text search options:

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



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

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

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

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

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

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

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

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

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

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

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

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

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

External Text Search

The External Text Search function allows you to search for text across text-based documents of a selected Document Type. Text-based documents include, but are not limited to, all documents with the following formats:

- Text Report Format
- Dynamic Document
- XML
- AFP
- PCL

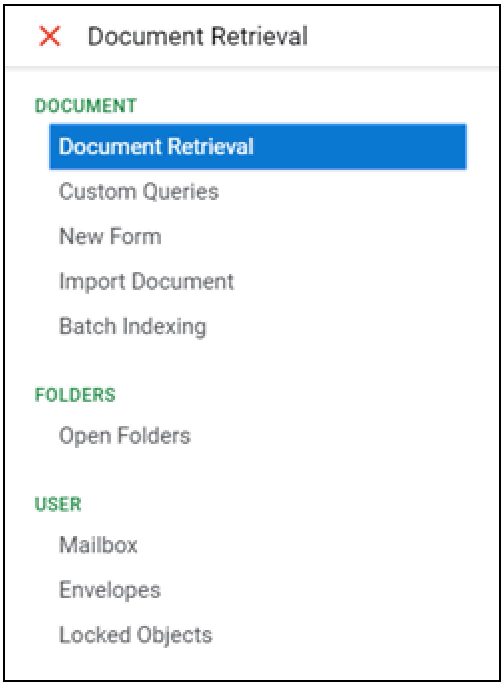
See also: Internal Text Search on page 363.

Document Retrieval Using External Text Search

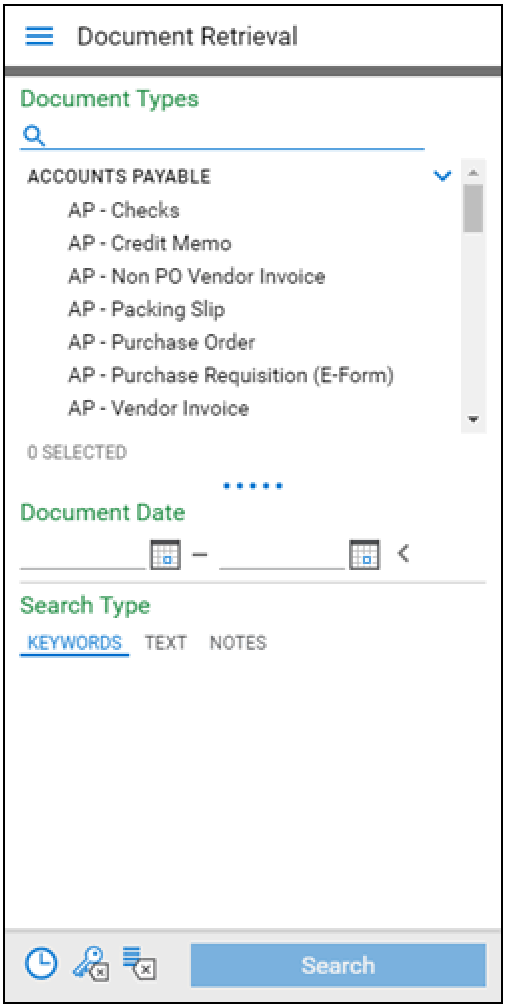
If you have sufficient privileges, you can search for specific text in a text-based document assigned to a Document Type or Document Type Group.

To retrieve documents using external text search:

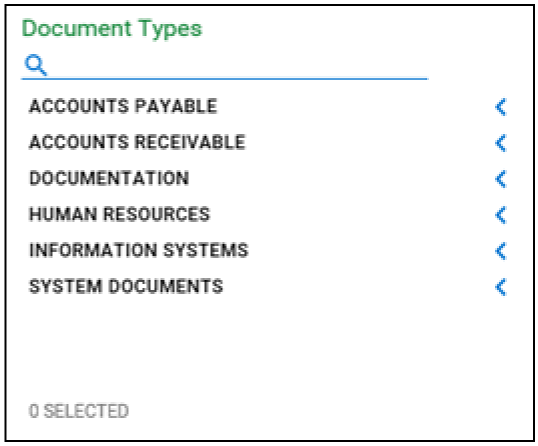
1. Select the Main Menu button. The Menu list is displayed.



2. Select **Document Retrieval** from the menu. The **Document Retrieval** information is displayed in the navigation panel.

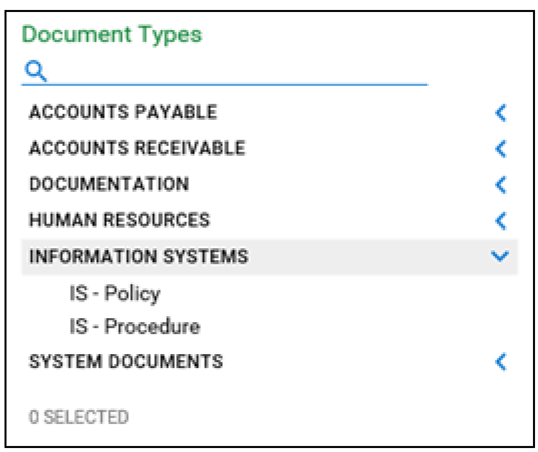


3. Select a Document Type from the **Document Types** section. Depending on how the Web Client has been customized, the Document Types may be collapsed under their corresponding Document Group.

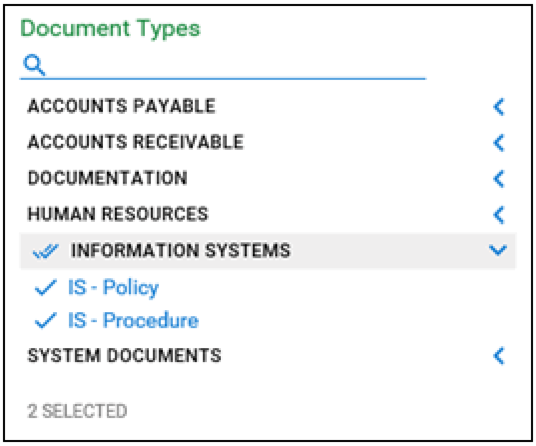


Click the drop-down arrow to expand a Document Type Group and view the document types in each group.

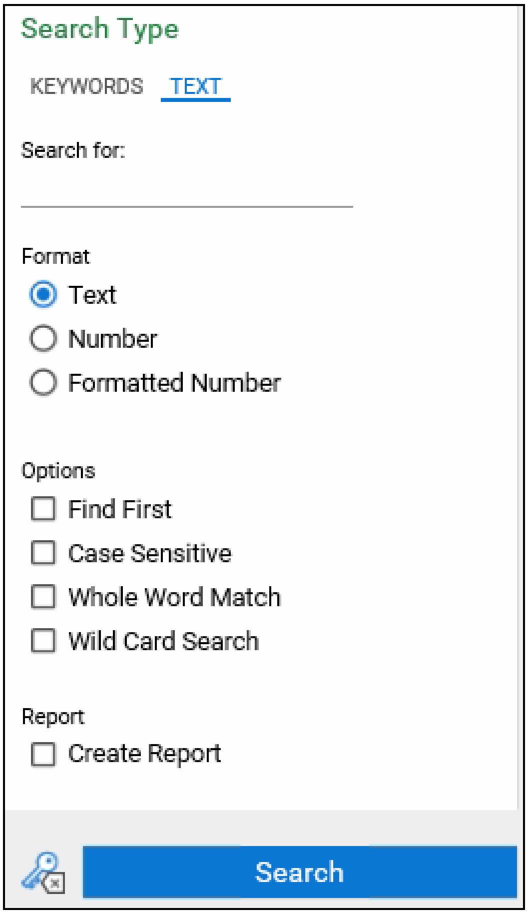
Tip: You can also use the keyboard to expand and collapse a Document Type Group. Select the Document Type Group, then press the **Right Arrow** key to expand or the **Left Arrow** key to collapse the Document Type Group.



4. From the **Document Types** list, select the Document Type(s) to be included in your search. To select multiple Document Types, use one of the following methods:
   - Press **Shift** or **Ctrl** as you click the documents to search.
   - Group the Document Types, and then select the Document Group name to select all documents in that group.



5. Click the **Text** tab in the panel. The external text search options are displayed.



6. In the **Search For** field, type the text string you want to search for. The string must contain at least two characters, and at least one character in the string must be a letter or a number.

7. Select a search type.
   - **Text** - Searches for alphanumeric text.
   - **Number** - Searches for numeric values and allows the use of the following operators to limit the search: **=**, **>**, **<**, **=>**, and **<=**. You can use **and**, **or**, and **to** as operators to search for a range of values. For example, type **2008 and 2009** to find documents containing both 2008 and 2009.

Caution: If you are searching for an exact number that is part of an alphanumeric text string, then the number will not be found. For example, if you search for **001** and the actual text is **ABC001**, then the value will not be found.

   - **Formatted Number** - Searches for numeric values that use formatting characters. For example, to search for all Social Security Numbers greater than 800-00-0000, type **> 800-00-0000** in the **Search String** field. You can use this option with following operators to limit your search: **=**, **>**, **<**, **=>**, and **<=**. The **to** operator can also be used to search for a range of values. For example, type **800-00-000 to 900-00-0000** to find documents containing values within this range.

Note: When you search for formatted numbers greater or less than the entered search string, formatted numbers followed by periods are not included in the search results. For example, if the formatted number is the last word in a sentence, then it will be omitted as a result.

8. Select one of the following options if necessary:
   - Select the **Find First** check box to limit the number of hits in each document search to one, which will limit search time. If **Finds First** is not selected, each document is searched until all hits are found.
   - Select the **Case Sensitive** check box to return only matches that have the same capitalization as the text string search criteria.
   - Select the **Whole Word Match** check box to match only a text string that is the exact word (not just merely characters matching the search criteria). If there are any spaces within the text string, the **Whole Word Match** check box will be unavailable.
   - Select the **Wild Card Search** check box to include wild card characters in your text string search criteria.

Note: These options are not available for Number and Formatted Number search types.

9. To generate a report of the text search criteria and results, select the **Create Report** check box. Enter the name of the report in the **Report Description** field. Enter the number of lines of text to show above and below the found text in the **Lines Before** and **Lines After** text fields.

10. Click the **Search** button in the toolbar.

    OnBase displays a Document Search Results list, which provides a link to each page that contains the text string, as well as the number of instances, or hits, per document.

Note: If no documents match your criteria, the Document Retrieval list displays **No documents found**.

11. Click a page number to display that hit in the Document Viewer. To display the hit in a new window, right-click the page number and select **Open in New Window**.

Note: If the selected document is displayed using an image rendition, the hits will not be highlighted on the document. The hits will only be highlighted when the selected document is displayed using a text rendition.

External Text Search Report

From the Text tab in the Document Retrieval mode, you can create reports of External Text Searches, including the search criteria and results. Reports are saved in the **SYS Search Reports** Document Type, in the **System Documents** Document Type Group.

Complete the following steps to use Document Retrieval to conduct an External Text Search:

1. To generate a report of the search, select the **Create Report** check box.
2. Enter a name for the report in the **Report Description** field. This name will be the **Description Keyword** value by which you can search for the report in Document Retrieval.
3. Enter the number of lines of text to show above and below the found text in the **Lines Before** and **Lines After** text fields.
4. Upon initiating the search, the report is created and displayed in the Document Viewer. The report is also automatically stored in the **SYS Search Reports** Document Type, in the **System Documents** Document Type Group. Information in the report includes, but is not limited to, the following items:
    - Date the report was generated
    - User that generated the report
    - Number of documents searched
    - Search string criteria
    - Number of occurrences (hits) of the search string

- Workstation from which the report was generated
- Names (Auto-Name string) of all documents found that met the search string criteria (Auto-Name)

5. Clear the **Create Report** option and initiate the search again to display the Document Retrieval list with all documents that meet the search criteria.

6. Click a page number link to display that result. Show or hide the Navigation Bar to expand the viewable area.

Note: Because the report is a document like any other document in the system, you can retrieve it through the Document Retrieval Process or by Custom Query. You can also include **SYS Search Reports** documents in a folder system or in your personal envelopes.

Wildcard Characters

A wildcard character can be used to match Keyword Values where one or more characters are unknown. Wildcards can only be used to match alphanumeric Keyword Values.

Note: Depending on your system's configuration, some alphanumeric Keyword Types may not allow wildcard characters to be used, or searches that include wildcards may return unexpected results.

Type one of the following wildcard characters directly into the Keyword Type field to search for text strings containing one or more unspecified characters:

Wildcard	Description
*****	The ***** wildcard character can be used to replace one or several characters of a text string. For example, the text string **Smit*** will find all instances of both **Smith** and **Smithsonian**.
?	The **?** wildcard character can be used to replace a single character in the text string. For example, the text string **SM?TH** will find all instances of both **Smith** and **Smyth**.

Note: Wildcard characters cannot be used to replace non-alphanumeric characters in external text searches. For example, a search for **it?s** will not return **it's**.

Custom Queries Shortcuts

The following keyboard shortcuts are available in Custom Queries mode:

Shortcut	Action
Ctrl + R	Displays the **Keywords** search tab.
Ctrl + S	Displays the **Text** search tab
Ctrl + I	Activates the **Search** button.
Ctrl + K	Activates the **Clear Keywords** button.
Ctrl + C	Activates the **Clear All** button.

Printing

In addition to printing an entire document, or a page or range of pages, you can also print sections of a page using the Rubber Band feature. This section describes how to print documents and how to print or save sections of a document using the Rubber Band feature.

Document printing methods and options vary depending on which document viewer is being used (ActiveX or HTML). See the following sections for information. If you are unsure of which document viewer is being used to view documents, contact your system administrator.

- For printing documents in the ActiveX document viewer, see Printing Documents on page 378.
- For printing documents in the HTML document viewer, see Printing Documents in the HTML Document Viewer on page 385.

Printing Documents

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

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

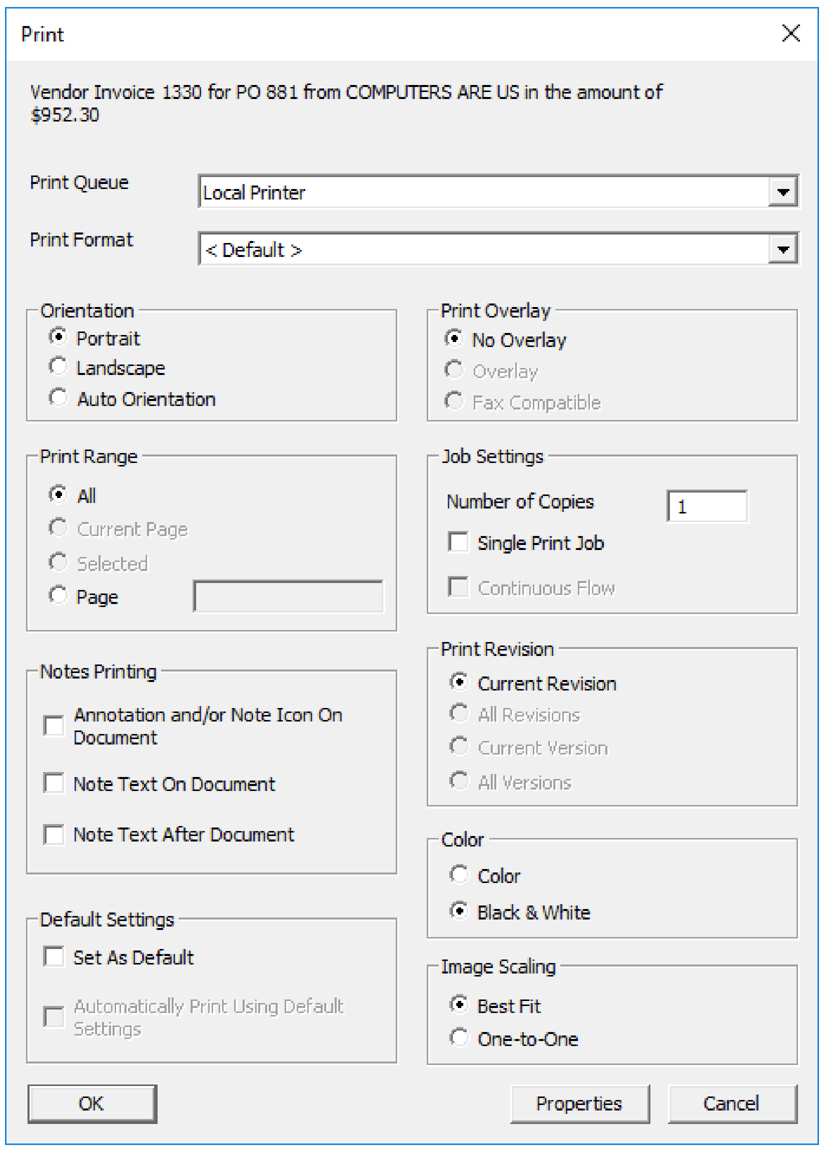
- From an open OLE document, select **Document | Print**.

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

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

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

The **Print** dialog box is displayed.



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

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

Option	Description
Print Queue	Select the desired network print queue (mapped to the desired printer) from the **Print Queue** drop-down list. Print queues manage the manner in which documents are printed by defining the method for generating the print request, as well as the type of printer that will be used to print the document when it is sent to that queue. Available Print Queues are defined by your system administrator. **Note:** To send a document to a Print Queue in the HTML Web Client, see Sending Documents to Print Queues in the HTML Web Client on page 391.
Print Format	The **Print Format** drop-down list displays configured print formats, which determine the appearance of the selected documents. When you select a print format, its settings are used as defaults in the print dialog. The print format default is the print format associated with the Document Type of the first document selected for printing. If a batch is selected or no print format is associated with the Document Type, the setting is **<Default>**. To override the print format defaults, change the settings in the print dialog box. When printing multiple items with varying document types, select **<Use Doc Type Default>** from the **Print Format** drop-down list. This selection prints each document using the print format configured for its Document Type. **Note:** The **<Use Doc Type Default>** option is not available when printing Document Types that do not have a default print format.
Orientation	**Portrait**: Prints the top of the page on the shortest side of the paper. **Landscape**: Prints the top of the page on the longest side of the paper. **Auto Orientation**: Prints the page according to its dimensions. For example, if the height of the page is greater than the width, **Portrait** is used. If the width of the page is greater than the height, **Landscape** is used. For multi-page images, the orientation is determined on a page-by-page basis. **Note:** These options do not apply to Microsoft Word documents and are not available for PDF documents. **Note:** This setting is not respected when printing XML documents. XML documents are printed using the default orientation setting of the printer.

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

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

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

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

3. Click **OK**.

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

E-Forms not Printing Correctly

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

Printing Documents in the HTML Document Viewer

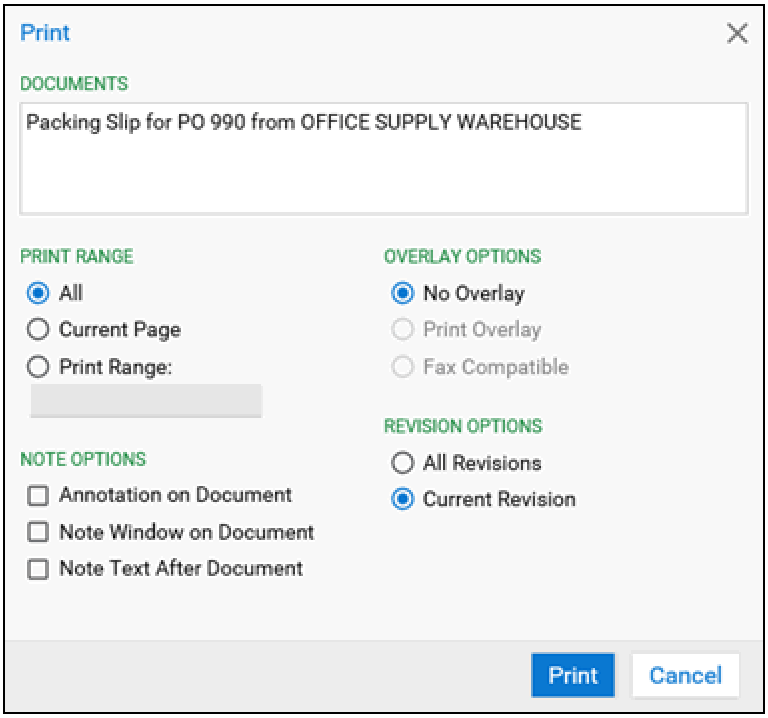
You can print documents using the HTML document viewer if you have sufficient privileges. Documents are first converted to a PDF, which you can then print using the PDF viewer's print option.

Note: If the document is open in an external application, such as Microsoft Word, use the print option in the external application. For example, select **File | Print** from the application. In this case, OnBase print options are not used.

To print a document using the HTML viewer:

1. From an open document, click the **Print** toolbar button.

   The **Print** dialog box is displayed.



2. Select the appropriate print options. See the following table for descriptions of the available print options.

Option	Description
Print Range	**All**: Prints all pages of the document(s). **Note:** The **All** Print Range option is the only option available when printing PDF documents, or when printing from a Document Search Results list. To print a range of pages for a non-PDF document, you must open the document and print using the **Print** toolbar button. **Current Page:** Prints the current page. **Print Range**: Prints a range of pages in the document. Enter page numbers and/or page ranges, separated by commas. For example: **1,3,5-12**. **Note:** If you enter a complex range into this field, the pages are printed in the order entered. For example, if you entered **5, 1-3, 9,** then page 5 of the document would be printed first, followed by pages 1, 2, 3, and 9. You cannot enter complex ranges when printing to a server print queue.
Overlay Options	**No Overlay:** Prints the document without the associated overlay. **Print Overlay**: Prints the document with the associated overlay. The overlay that is printed may be different than the overlay that is displayed, depending on the configuration of the Document Type. **Fax Compatible**: Select this option if you are printing to a fax machine. OnBase arranges the overlay image in a way that faxing software can properly interpret. The overlay that is faxed may be different than the overlay that is displayed or printed, depending on the configuration of the Document Type.
Note Options	**Annotation on Document**: Prints the note annotation (graphical representation of a note) on the document. **Note Window on Document**: Prints the title and text of any notes in that note's location on the document, the name of the user that created the note, the date and time it was created, and the Print Title configured for the selected Document Type. This option is not respected for HTML documents, OLE documents, or PDF documents. This option is not respected by Overlapped Text annotations. **Note Text After Document**: Prints the title and text of any notes, the name of the user that created the note, the date and time it was created, and the Print Title configured for the selected Document Type on a separate page. **Note:** Depending on your system's configuration, some note icons or text may not be printed no matter what **Notes Options** you have selected. See your system administrator for more information. **Note:** The **Annotation on Document** and **Note Window on Document** options do not apply to E-Forms, HTML forms, or XML documents.

Option	Description
Revision Options	These options are only respected if your database is licensed for EDM Services. For more information, see the **EDM Services** documentation. **Note:** The **Current Revision** option is automatically selected.

3. Click **Print**. A new window is displayed, containing a PDF version of the document with your page range selection applied.

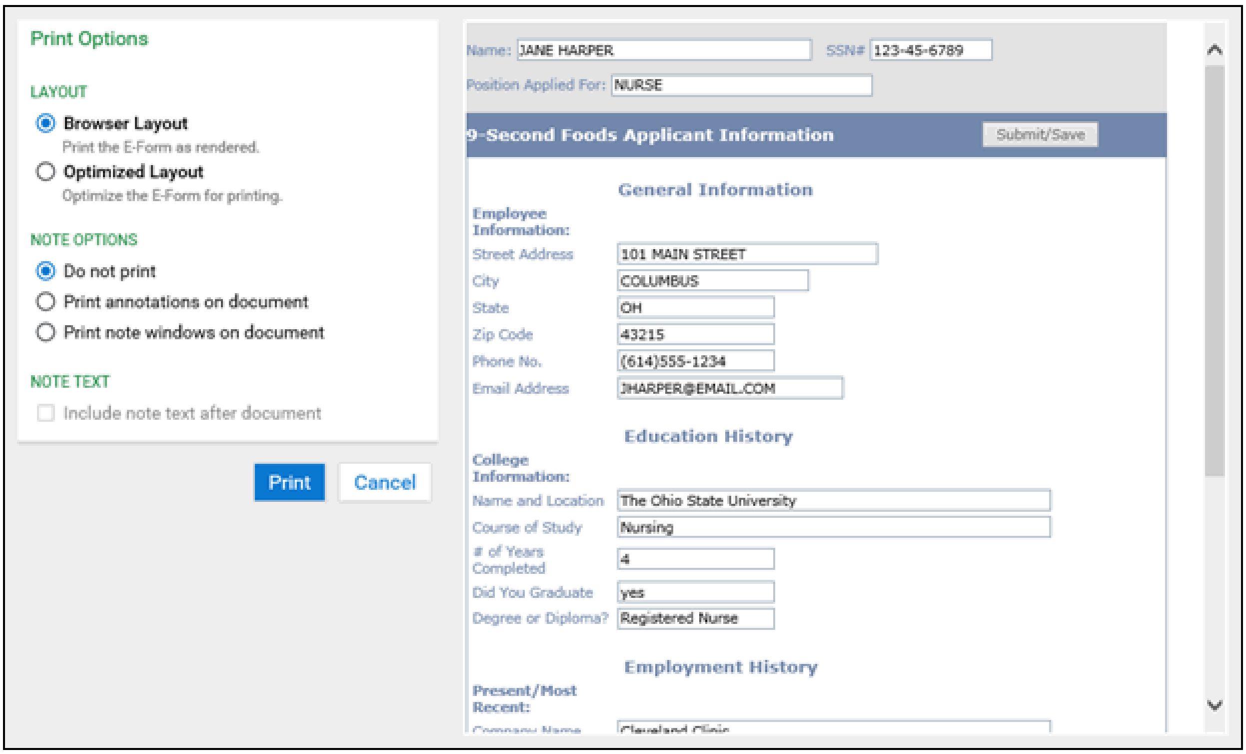
   Depending on your configuration settings, your browser's print dialog box may also be displayed.
4. Click **Print** to continue printing the document.

Printing E-Forms in the HTML Document Viewer

If you have rights to print E-Form documents, prior to printing an E-Form, you can select an optimized print layout for the form. This process renders the E-Form in a more print-friendly layout.

To optimize an E-Form for printing:

1. Right-click on an open E-Form in the document viewer.
2. Select the **Print** menu option. The E-Form is displayed in a new window:



From this window, you can select an optimized print layout for the E-Form. By default, the **Browser Layout** print option is selected. This option prints the E-Form as it is rendered by your Web browser. A preview of how the E-Form will print is displayed on the right side of the screen.

3. To choose an optimized print layout, select **Optimized Layout**. The following options become available:
   - **In-Place**: Removes the form field boxes from the print view, leaving behind the text values from the form fields. The styling of the E-Form is retained.
   - **Row-Based**: Removes the styling of the E-Form, leaving behind only the form field titles and their field values.
   - **Tabular-Based**: Removes the styling of the E-Form, and places the form field titles and their field values into a table layout.

   The E-Form print preview is updated based on the optimized layout setting that you select.

4. Select an option in **Note Options** to specify how to print notes on the E-Form:

Note: The **Note Options** are not available for row-based or tabular-based optimized layouts.

- The **Do not print** option does not allow notes to be printed on the E-Form.
- The **Print annotations on document** option prints the note annotation (graphical representation of a note) on the E-Form.
- The **Print note windows on document** option prints the title and text of any notes in that note's location on the E-Form, the name of the user that created the note, and the date and time it was created.

The E-Form print preview is updated based on the **Note Options** that you select.

5. Select the **Include note text after document** option to print the title and text of any notes, the name of the user that created the note, and the date and time it was created below the printed form field titles and values.

Note: The **Include note text after document** option is only available for row-based or tabular-based optimized layouts.

6. When you are finished selecting a print layout, click **Print**. Your Web browser's print dialog box is displayed.
7. Click **Print** to continue printing the document.

Print or Copy Sections of a Document Using Rubber Band

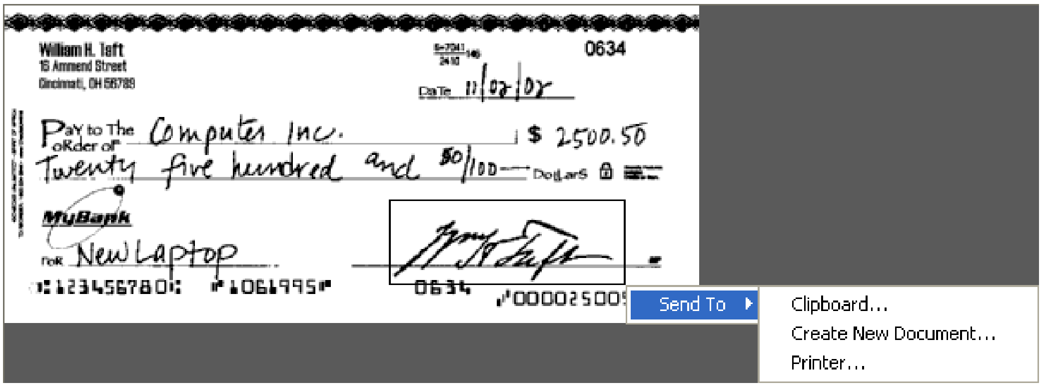
You can print or copy an area of a text or image document using the Rubber Band feature. Copied content can be pasted into another program or be used to create a new document in OnBase. To successfully print or copy selected areas of a text document with an overlay applied, the overlay must be removed.

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

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

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

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



4. Select one of the following options:

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

Sending Documents to Print Queues in the HTML Web Client

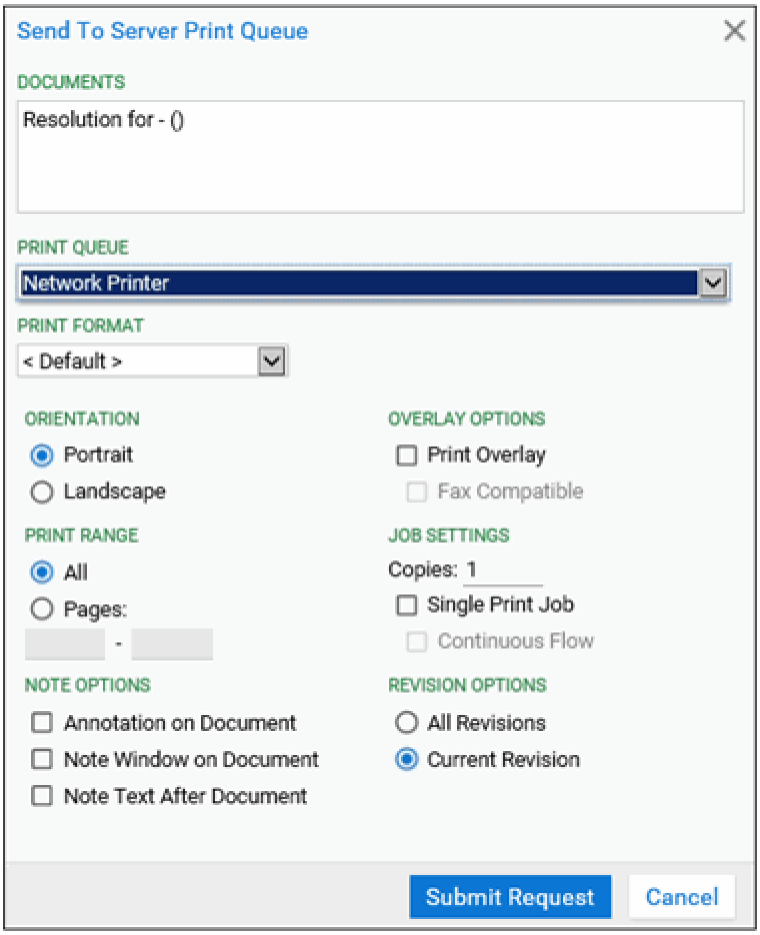
If you have sufficient privileges, you can send a document to a server print queue.

Note the following considerations:

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

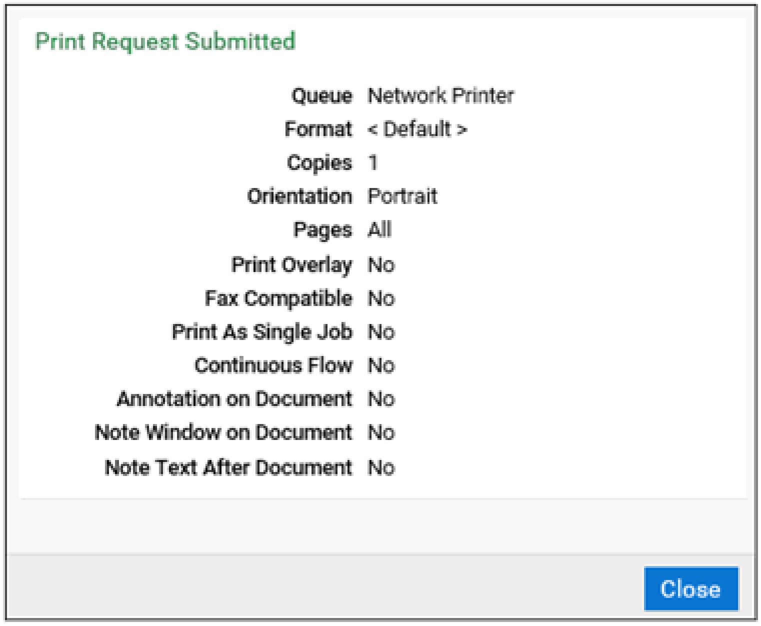
To send documents to a server print queue:

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



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

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



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

Print Queue Dialog Box Options

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

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

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

File Format not Supported for Printing

If you see the following error message upon trying to print one or more documents from a Document Search Results list, the File Format is not supported for printing, or the page range is not valid. See your system administrator for additional information regarding file formats.

File type of one or more selected documents does not support printing from the hit list.

Note: Printing .MSG and .EML file type documents from the Document Search Results list is not supported in the ActiveX Web Client. These documents must be opened and printed from their native applications.

Reports

You can generate the following reports:

- List Reports
- External Text Search Report
- CSV File
- Keyword List Report

Creating List Reports

If you have the appropriate user rights, you can create a list report of selected documents or all documents in a Document Search Results list or envelope. A list report lists the Auto-Names assigned to the documents, as well as the total number of documents included in the report. The report also identifies the date and time of report creation and the user name of the report's creator. You can display this report in its own Web page for temporary viewing, print the report, store it in OnBase for future retrieval, or export it to a Microsoft® Excel® file for additional analysis.

Note: The **Create List Report** option is displayed only if the user has been configured with the **Create List Report** privilege. See your system administrator if you need this privilege.

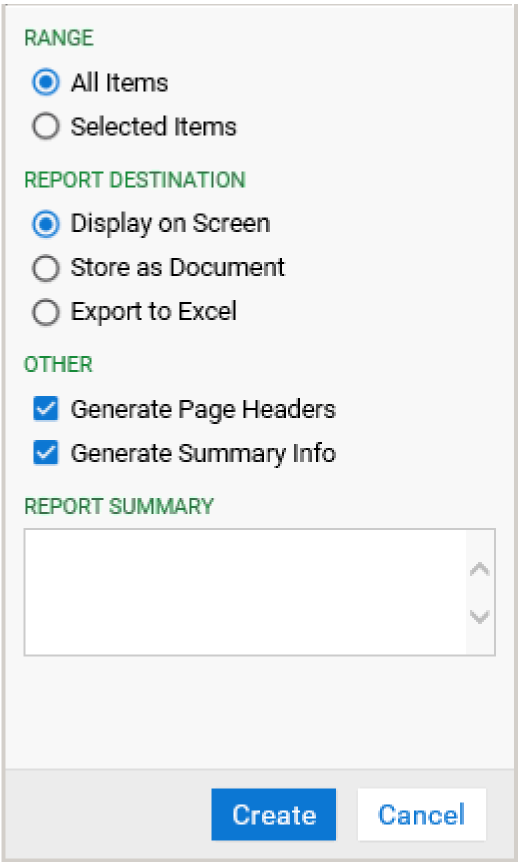
The following example illustrates a list report that has been stored in OnBase.

```
-------------------------------------------------------------------------------------------
LSTRPT055PAGE: 1
11/24/2014 11:56:55AM      List Contents Report by Cindy Smith on 11/24/2014 at 11:56:55AM
Search Results Title: AP - Purchase Order
-------------------------------------------------------------------------------------------
Purchase Order 999 for TAP-IT BUTTONS, INC in the amount of $313.75
Purchase Order 992 for PHONE SHACK in the amount of $4,000.00
Purchase Order 990 for OFFICE SUPPLY WAREHOUSE in the amount of $500.00
Purchase Order 989 for COMPUTERS ARE US in the amount of $959.00
Purchase Order 898 for TAP-IT BUTTONS, INC in the amount of $1,512.50
Purchase Order 885 for OFFICE SUPPLY WAREHOUSE in the amount of $281.14
Purchase Order 888 for PHONE SHACK in the amount of $1,110.00
Purchase Order 881 for COMPUTERS ARE US in the amount of $800.00
Purchase Order 797 for TAP-IT BUTTONS, INC in the amount of $600.00
Purchase Order 779 for PHONE SHACK in the amount of $3,000.00
Purchase Order 767 for OFFICE SUPPLY WAREHOUSE in the amount of $834.60
Purchase Order 765 for COMPUTERS ARE US in the amount of $854.40
Purchase Order 676 for TAP-IT BUTTONS, INC in the amount of $1,183.00
Purchase Order 662 for PHONE SHACK in the amount of $3,210.00
Purchase Order 660 for OFFICE SUPPLY WAREHOUSE in the amount of $208.65
Purchase Order 656 for COMPUTERS ARE US in the amount of $3,775.00
-------------------------------------------------------------------------------------------
Total Documents                : 16
Total Processing Time                  :   0 Hours, 0 Minutes, 1 Seconds
```

1. Select one or more documents from the Document Search Results list. If you do not select any documents, the list report will automatically list all of the documents in the Document Search Results list.

Note: You can select documents only from the current page of the Document Search Results list. **Ctrl**-clicking and **Shift**-clicking do not carry from one page to another. If you need to display more results on one page, increase the results per page setting in the Document Search Results list options.

2. Right-click and select **Create List Report**. The **List Report Options** dialog box is displayed:



3. From the **Range** options, select **All Items** or **Selected Items**:
   - Select **All Items** to include every document in the Document Search Results list in the list report.
   - Select **Selected Items** to include only the selected document(s).

Note: If you did not select any documents in the Document Search Results list, the **Selected Items** option is unavailable.

4. Under **Report Destination**, select one of the following options:
   - Select **Display on Screen** to display the list report in a new View List Report window without saving it to OnBase.

     While viewing the list report in the View List Report window, you can print the list report by performing the **Ctrl + P** keyboard shortcut.
   - Select **Store as Document** to save the list report as a text document in OnBase.

     When you select this option, the list report will be displayed in the Document Viewer after it is saved. The text document is stored in the **SYS List Contents Reports** Document Type.

- Select **Export to Excel** to display the list report as an Excel file that can be saved externally.

  You can choose whether to display the Excel file in .xls or .xlsx file format.

5. Under **Other**, select from the following options:
   - Page headers identify the date and time that the report was created and the user who created it. To remove page headers from the report, clear the **Generate Page Headers** check box. If this option is selected, the page headers will be displayed on every page of the report.
   - Summary information is the total number of documents in the list report and the amount of time required (hours, minutes, and seconds) to create the report. It is typically displayed at the end of the report. To omit summary information from the report, clear the **Generate Summary Info** check box.
6. To provide your own summary information about the report, type a description in the **Report Summary** field.

   If you are storing the report as a document in OnBase, limit the description to 100 characters. The **Report Summary** field accepts more than 100 characters, but only 100 characters are displayed on the document stored in OnBase.
7. Click **Create**. The system creates the list report and displays it according to the selected **Report Destination**.

   If you selected **Export to Excel**, you may be prompted to open or save the report file. Click **Open** to display the file in Microsoft Excel, or click **Save** to save the file to a local hard drive or network share. Note the following browser-specific details:
   - Internet Explorer: If only the **View Downloads** button is displayed, widen the export browser window until **Open** and **Save** are displayed. Alternatively, you can click **View Downloads** and then open or save the Excel file from Internet Explorer's downloads window.
   - Safari: Users are not prompted to open or save the file. Instead, the report file is saved to the directory specified in Safari Preferences.

   If you selected **Display on Screen**, you can print the list report from the View List Report window by pressing **Ctrl + P**.

Tip: If you selected **Display on Screen** and you decide you want to save the report, you can copy the text from the browser window and save it to a text file.

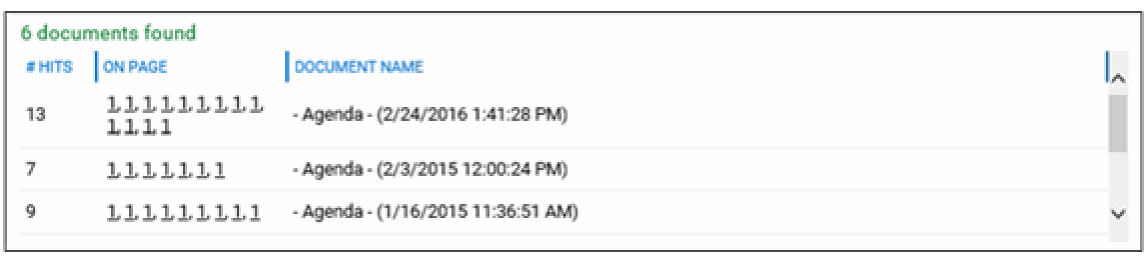
Note: If you stored the report as a document but you lack rights to the **SYS List Contents Reports** Document Type, you cannot view the report. Contact your system administrator for assistance.

External Text Search Report

From the Text tab in the Document Retrieval mode, you can create reports of External Text Searches, including the search criteria and results. Reports are saved in the **SYS Search Reports** Document Type, in the **System Documents** Document Type Group.

Complete the following steps to use Document Retrieval to conduct an External Text Search:

1. To generate a report of the search, select the **Create Report** check box.
2. Enter a name for the report in the **Report Description** field. This name will be the **Description Keyword** value by which you can search for the report in Document Retrieval.
3. Enter the number of lines of text to show above and below the found text in the **Lines Before** and **Lines After** text fields.
4. Upon initiating the search, the report is created and displayed in the Document Viewer. The report is also automatically stored in the **SYS Search Reports** Document Type, in the **System Documents** Document Type Group. Information in the report includes, but is not limited to, the following items:
   - Date the report was generated
   - User that generated the report
   - Number of documents searched
   - Search string criteria
   - Number of occurrences (hits) of the search string
   - Workstation from which the report was generated
   - Names (Auto-Name string) of all documents found that met the search string criteria (Auto-Name)
5. Clear the **Create Report** option and initiate the search again to display the Document Retrieval list with all documents that meet the search criteria.



6. Click a page number link to display that result. Show or hide the Navigation Bar to expand the viewable area.

Note: Because the report is a document like any other document in the system, you can retrieve it through the Document Retrieval Process or by Custom Query. You can also include **SYS Search Reports** documents in a folder system or in your personal envelopes.

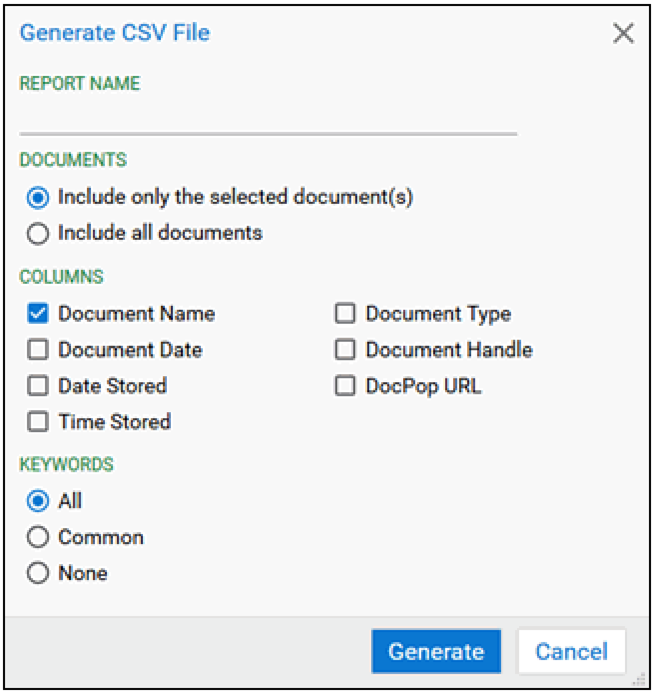
Generating a CSV File

You can create a comma-separated values (CSV) file that contains information about selected documents. This file is created by the **Generate CSV File** right-click menu option in a document select list. You can specify the information to include in the CSV file. The **Generate CSV File** option is available in the **Document Retrieval** and **Custom Queries** layouts.

Note: The **Generate CSV File** option is available only if the user has the **Generate CSV Files** privilege. See your system administrator for more information.

To generate a CSV file:

1. In a document select list, select the documents you want to include in the CSV file, and then right-click and select **Generate CSV File**. To include information for all documents in the document select list, right-click any document in the list. The **Generate CSV File** dialog box is displayed.



2. Enter a name for the CSV file in the **Report Name** field. This name is used for the file name of the CSV file.
3. In the **Documents** section, select one of the following options to specify which documents you want include information for in the CSV file:

Option	Description
Include only the selected document(s)	Only include information for the documents you selected.

Option	Description
Include all documents	Include information for all documents in the document select list.

4. In the **Columns** section, select one or more of the following options to specify what information you want to include for each document in the CSV file:

Option	Description
Document Name	The Auto-Name string of the document.
Document Date	The date used by OnBase to identify the document. The document date is assigned to a document during import, and it can be modified after import.
Date Stored	The date on which the document was imported into OnBase. This date cannot be modified after import.
Time Stored	The time at which the document was imported into OnBase. This time cannot be modified after import.
Document Type	The name of the Document Type to which the document belongs.
Document Handle	The unique document number assigned to the document when it was imported into OnBase.
DocPop URL	The URL used to access the document using DocPop. **Note:** The **DocPop URL** option is displayed only if the user has the **Create Integration Hyperlink** privilege. See your system administrator if you need this privilege.

5. In the **Keywords** section, select one of the following options to specify which Keyword Values to include in the CSV file:

Option	Description
All	Include all Keyword Values for all documents included in the CSV file.
Common	Include only the Keyword Values for the Keyword Types that all the documents included in the CSV file have in common.
None	Include no Keyword Values in the CSV file.

6. Click **Generate**. You are prompted to save the CSV file to your local workstation.
7. Browse to a location for the CSV file and click **Save**. The CSV file is generated and saved to the location.
8. Click **Cancel** in the **Generate CSV File** dialog box to return to the document select list.

Creating a Keyword List Report

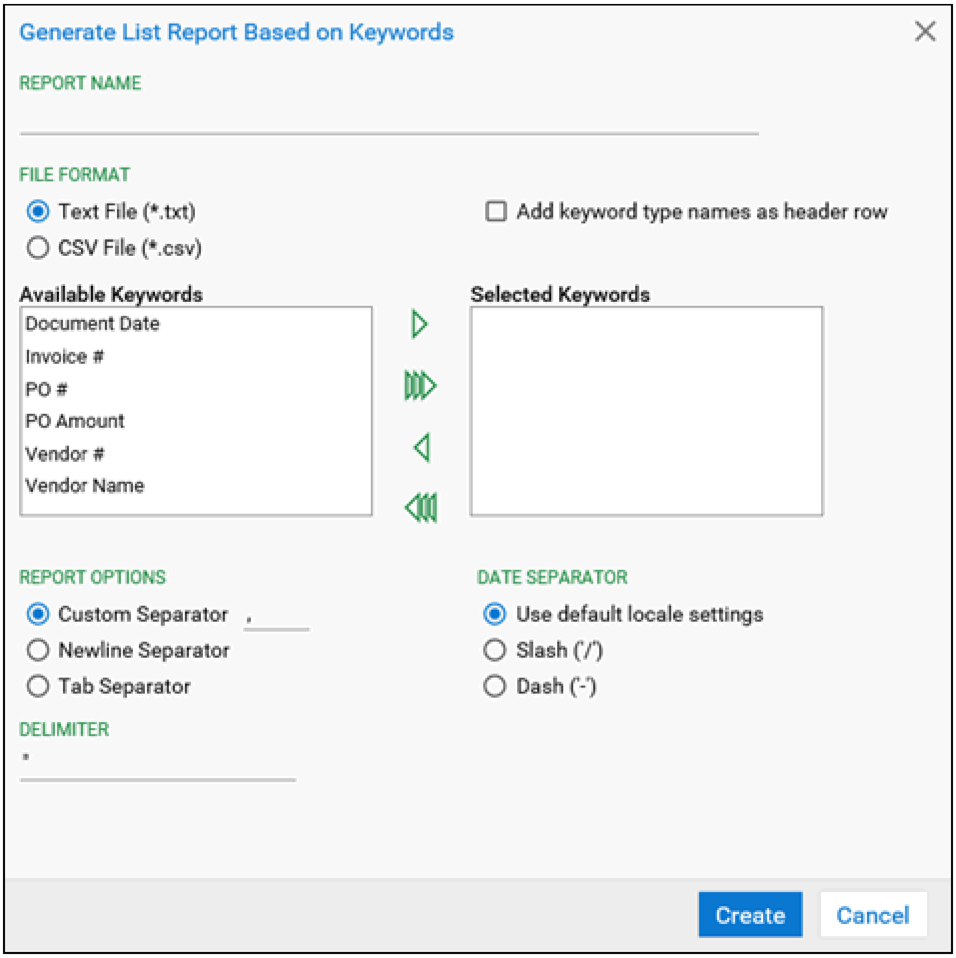
You can create a Keyword List Report for documents using the **Create Keyword List** option from the right-click menu in the Document Select List. Selecting this option places any items that match the selected keywords into either a text document, or into an Excel spreadsheet. You can determine the keyword(s) you want placed in the report.

You can create the report for a single document, or for multiple documents in the Document Select List. To select multiple documents, select the first document, press and hold **Ctrl** on your keyboard, and then select any other documents you want to include in the report.

Note: The **Create Keyword List** option is displayed only if the user has been configured with the **Create List Report** and **Modify** and **View Keywords** privileges. See your system administrator if you need these privileges.

To create a Keyword List Report:

1. From the Document Select List, select the document(s) you want to include in the report.
2. Right-click on the selected document(s) and select **Create Keyword List**. The **Generate List Report Based on Keywords** dialog box is displayed.



3. Type a name for the report in the **Report Name** field.
4. Select the file format for the report. The options include **Text File** and **CSV File**.
5. Select the **Add keyword type names as header row** to display the Keyword types in the header of the document.
6. From the **Available Keywords** section, select the keywords to include in the report. Do one of the following to move keywords to the **Selected Keywords** section:
   - Select a single keyword and use the single arrow to move it over.
   - Select multiple keywords using the **Ctrl** key and use the multi-arrow to move it over.

7. Select one of the following report options from the **Report Options** section:
    - **Custom Separator**. Separates the elements of the report with the custom character entered in the field. For example, if the separator is a comma, each item is separated with a comma as follows: Agenda Name, Agenda Item.
    - **Newline Separator**. Places each item in the report on a new line.
    - **Tab Separator**. Separates the elements of the report with a tab.
8. Type the character to use as the delimiter in the **Delimiter** field. The delimiter is used to provide the boundary between report results. For example, "Agenda Name", "Agenda Item."
9. If one of the keywords includes a date, select a separator from the **Date Separator** options. The **Use default locale settings** option detects the default locale of the workstation and uses the default date separator for that locale.
10. Click **Create**. Depending on the browser you are using, either a dialog box is displayed with options on what to do with the file, or a pop-up menu displays at the bottom of the screen with the same options.
11. Select from one of the following options:
    - **Open with**. Select how to open the file from the available options in the drop-down list.
    - **Save File**. Select to save the file to a location you choose.
12. Select the **Do this automatically for files like this from now on** to save your selections.
13. Click **OK**. The Keyword List Report is displayed with the options you chose.

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.

DocPop and Unity Pop

Note: This section applies to working with OnBase through the Unity Client and Web Client.

DocPop and Unity Pop serve similar purposes, but they are not interchangeable. There are situations where one Pop integration should be used over the other.

Unity Pop assumes that users have the Unity Client installed, are operating the Unity Client in Service Mode, and have user accounts in OnBase. Unity Pop may be recommended for a Unity Client installation or where Unity Pop provides additional benefits over DocPop.

- Use DocPop if the Unity Client will not be installed on users' workstations. DocPop requires no OnBase software on the user's workstation, whereas Unity Pop requires the Unity Client.
- Use DocPop if Macintosh users require access to OnBase. Unity Pop cannot run on a Macintosh operating system. In environments where only some users have the Unity Client installed, use DocPop to ensure all users can view documents.
- Use DocPop for unauthenticated integrations or where OnBase documents are available to the public. For example, Unity Pop should not be used to provide public access to documents from a county Web site, because most public users would not have the Unity Client installed on their workstations.
- Use Unity Pop if users send external email messages from the Unity Client only to other users who have the Unity Client installed on their workstations. Use DocPop if messages are sent to users who may or may not have the Unity Client installed.

Document Retrieval

Dates

It is considered a best practice to select a document date or range of document dates from the **Dates** panel when retrieving documents. Selecting a document date or range of document dates expedites document retrieval.

Drop-Down Lists

When a Keyword Type is configured with a drop-down list, it is considered a best practice to type any known characters in the Keyword Value field before clicking the drop-down list icon. OnBase automatically appends a wildcard to the end of the string of known characters, and filters the available values from the drop-down list accordingly.

Wildcards

Wildcard searches impose extensive database load, and can negatively impact other users. Wildcard searches often generate a Document Search Results list that is much larger than necessary, and is not useful.

To ensure high database performance and execute queries more efficiently, the following are considered best practices for using wildcards when searching:

- Only use leading wildcards in searches when attempting to retrieve documents with complex or misspelled Keyword Values.
- Provide as many known characters as possible before using a wildcard, preferably four or more.

Importing

Text Documents

To ensure correct functionality for all text documents, it is considered a best practice to remove all Tab characters from text documents before importing them into OnBase. Tab characters that are not removed are converted to spaces when imported into OnBase.

Indexing

Multi-Instance Keyword Type Groups

When duplicating a Multi-Instance Keyword Type Group, it is considered a best practice to index all Keyword Values in the Multi-Instance Keyword Type Group, even if only one Keyword Value is different between the original Multi-Instance Keyword Type Group and the duplicate Multi-Instance Keyword Type Group.