OnBase®
Foundation EP5

Web Parts for Microsoft SharePoint

Reference Guide

Includes:

Installation Guide

Administration Guide

User Guide

Foundation EP5

Copyright

Document Name .... Web Parts for Microsoft SharePoint

Department/Group .... Documentation

Revision Number .... Foundation EP5

OVERVIEW

INSTALLATION GUIDE

INSTALLATION

ADMINISTRATION GUIDE

STATUSVIEW WEB PART CONFIGURATION

USER GUIDE

USAGE

VIEWING DOCUMENTS & FOLDERS

Overview

The Web Parts for Microsoft SharePoint module allows for several OnBase components to be integrated in the Microsoft SharePoint® interface. These components allow users to perform work in OnBase while remaining in SharePoint.

StatusView Web Parts

StatusView Web Parts provide access to StatusView portlets from within SharePoint. First, portlets are assigned to appropriate user groups through the StatusView interface. Then, the portlets can be added to SharePoint pages and configured appropriately. Once configured, the portlets provide a seamless integration with SharePoint and OnBase.

StatusView Web Parts support all StatusView portlets, including Business Activity Monitoring (BAM), Custom Queries, Document Knowledge Transfer (DKT), E-Forms, Envelopes, File Upload, Folders, Workflow, and WorkView.

Authentication

For a seamless experience, user authentication can be performed using Active Directory Authentication. For information on Active Directory Authentication see the **Legacy Authentication Methods** module reference guide.

The StatusView Web Parts also support authentication using the Microsoft Secure Store Service (for SharePoint 2016 and 2019).

Note: These authentication methods are not supported for StatusView Web Parts when using SharePoint Online.

Licensing

This module requires licenses for the following:

- Web Parts for Microsoft SharePoint
- Web Server
- StatusView—Required for StatusView Web Parts only
- Client

Some portlets are based on modules which require additional licensing. To use a portlet for a specific module, your system must be licensed for the module.

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

OnBase®
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Web Parts for Microsoft SharePoint

Installation Guide

Foundation EP5

Requirements

The following sections outline requirement information specific to Web Parts for Microsoft SharePoint in OnBase Foundation EP5.

General Requirements

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

- Databases Supported
- Database/File Servers
- Supported Desktop Operating Systems for the **Web/Application Server** and **Web Client** table columns
- Server Browser Requirements
- Web Client Browser Requirements
- 64-Bit Server Hardware Requirements
- Web Client Hardware Requirements
- Microsoft .NET Framework Requirements

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

- Server C++ Requirements

Third-Party Software

Web Parts for Microsoft SharePoint is supported with the following SharePoint products:

- Microsoft SharePoint Foundation 2013
- Microsoft SharePoint Server 2013
- Microsoft SharePoint Online 2013
- Microsoft SharePoint Server 2016

Licensing

See Licensing on page 1 for licensing requirements.

Upgrade Considerations

The following upgrade considerations have been compiled by OnBase subject matter experts. These upgrade considerations are general and applicable to most OnBase solutions and network environments and should be considered each time an upgrade is performed.

Carefully consider the impact of making any changes, including those listed below, prior to implementing them in a production environment.

For additional general information about upgrading OnBase, refer to the Upgrade Guidelines reference manual, and visit the Hyland Community at: https://www.hyland.com/community.

Web Parts for Microsoft SharePoint Upgrade Considerations

The following information should be considered or noted when upgrading Web Parts for Microsoft SharePoint deployments. Read this information prior to upgrading your version of OnBase.

General Deployment Considerations — In addition to the previous considerations, the following should be considered with regard to general deployments:

- Once the Web Server is upgraded from any version of OnBase before 18 to Foundation EP5, any existing deployments of Web Parts for Microsoft SharePoint will not function until the version Foundation EP5 Web Parts for Microsoft SharePoint installer is successfully run and the Web Parts for Microsoft SharePoint deployment has been upgraded to OnBase Foundation EP5.

Upgrading from Version 10.0.0 to Foundation EP5

If you upgrade the OnBase Web Server to Foundation EP5 from OnBase 10.0.0 or earlier, then the Web Parts using that Web Server must also be upgraded.

If the Web Server is upgraded but the Web Parts are not, then the Web Parts will not work. Instead, users are presented with a message instructing them to contact their administrator to upgrade.

Pre-Installation

Your pre-installation requirements depend on whether you are using an on-premises installation of SharePoint (SharePoint Foundation or SharePoint Server) or SharePoint Online. See the sections below for specific requirements.

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

On-Premises Pre-Installation Requirements

Before you begin installing Web Parts for Microsoft SharePoint, note the following requirements:

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

SharePoint Online Pre-Installation Requirements

If you are using Microsoft SharePoint Online, note the following pre-installation requirements:

- The OnBase Web Server must be installed and StatusView must be configured.
- The OnBase Web Server and the SharePoint server must both belong to the same Internet Explorer security zone on client workstations in order for OnBase Web Parts to be displayed correctly in SharePoint.
- The OnBase Web Server and the SharePoint server must both use the HTTPS protocol, and the OnBase Web Server must be configured for HTTPS bindings. One server cannot use HTTP while the other uses HTTPS.
- The OnBase Web Server and SharePoint server are installed in separate domains. The OnBase Web Server must be configured for Active Directory authentication, and there must at least be a one-way trust from the OnBase domain to the SharePoint domain.
- If multiple OnBase integrations for SharePoint are installed, ensure they are all on the same version.

Upgrading to Version 10.0.0 to Foundation EP5

If you upgrade the OnBase Web Server to Foundation EP5 from OnBase 10.0.0 or earlier, then the Web Parts using that Web Server must also be upgraded.

If the Web Server is upgraded but the Web Parts are not, then the Web Parts will not work. Instead, users are presented with a message instructing them to contact their administrator to upgrade.

Uninstalling Web Parts for Microsoft SharePoint

If you are upgrading from a previous version of Web Parts for Microsoft SharePoint, you must first uninstall the previous version.

Installers Overview

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

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

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

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

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

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

ClickOnce deployments also have the following advantages:

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

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

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

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

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

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

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

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

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

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

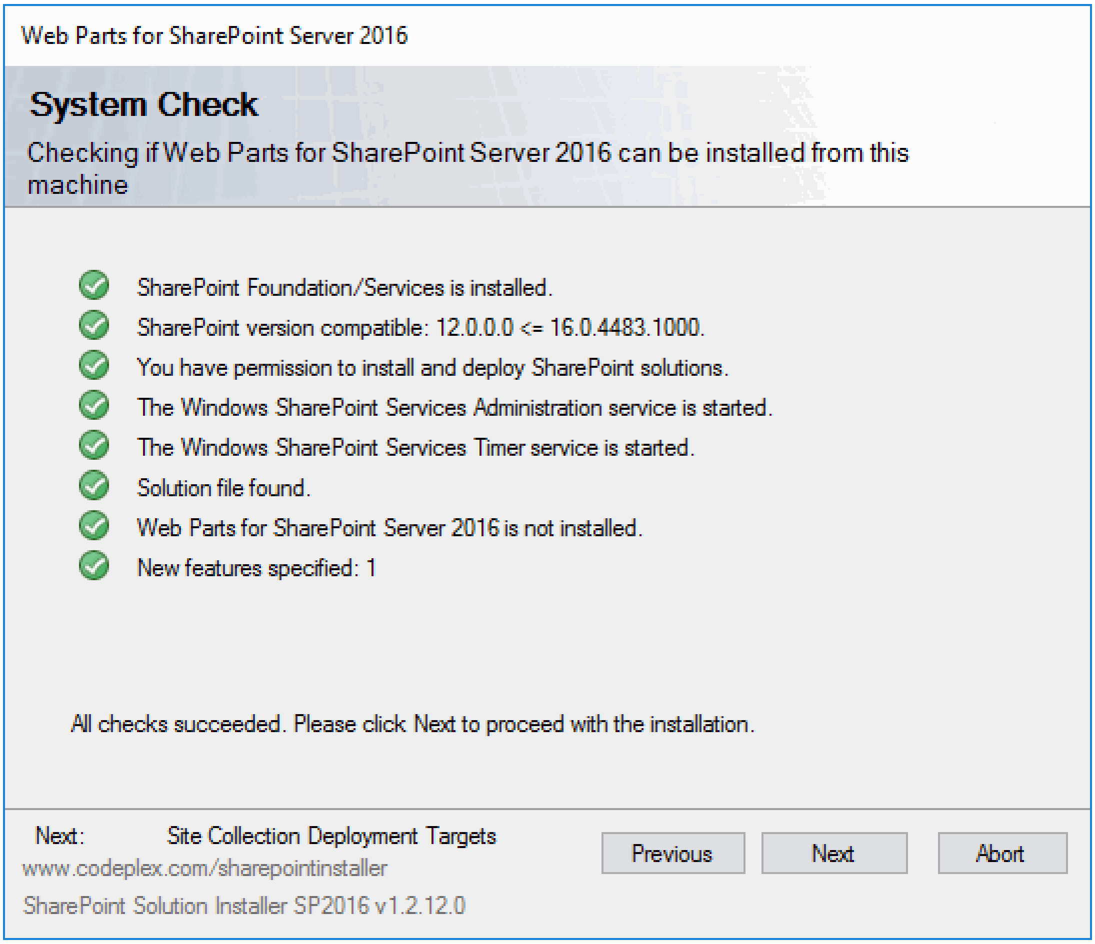
StatusView Web Part Installation with SharePoint 2016

The following procedures describe how to install Web Parts for Microsoft SharePoint using SharePoint Server 2016.

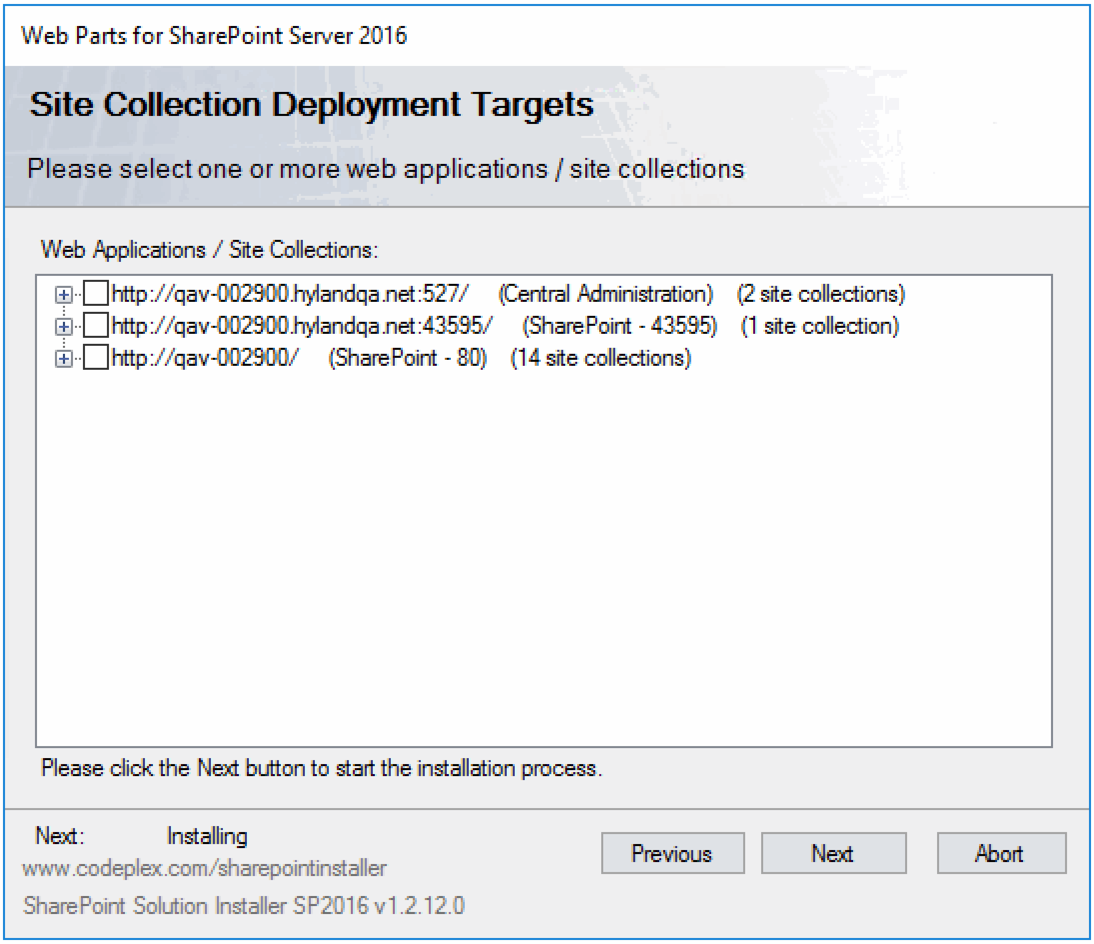
Running the Installer (SharePoint 2016)

To install the Web Part to a server running SharePoint Server 2016:

1. Double-click on the **Setup2016.exe** to begin installation. The setup file resides in the following directory of the Core Services build:
   ..\install\Sharepoint\SharePoint 2016\Web Parts\SharePoint Server 2016
2. From the welcome screen, click **Next**.
3. Wait while the installer checks whether Web Parts can be installed on the server.



4. If a check fails, address the issue and start again. If all checks succeed, click **Next**. The **Deployment Targets** screen displays the Web applications available for deployment.



5. Ensure only the Web applications you want to deploy Web Parts for Microsoft SharePoint to are selected. You can expand a Web application to view and select specific site collections, also.
6. Click **Next**. The installer distributes the files required to set up Web Parts for Microsoft SharePoint.

   If the deployment is successful, the **Installation Successfully Completed** screen displays each Web Front End machine to which the solution was deployed.

Note: If the installation fails, re-run the installer. SharePoint places locks on certain files, which may prevent a successful installation. If the installation is unsuccessful after several attempts, reboot the server and try again.

7. Click **Close**.
8. Configure the Web Part with your OnBase Web Server URL. See Web Part Configuration (SharePoint 2016) on page 10.

Web Part Configuration (SharePoint 2016)

1. In Windows Explorer, browse to the folder appropriate for your SharePoint edition:
   - **SharePoint Server 2016**: C:\Program Files\Common Files\Microsoft Shared\web server extensions\15\TEMPLATE\FEATURES\OnBaseWebPartsforServer2016
2. Open the **OnBaseStatusViewWebpart.dwp** in a text-editing application.
3. In the following two nodes, change **observer/AppNet** to your OnBase Web Server URL:
   - <HelpLink>http://observer/Appnet/Help/Sharepoint/Sharepoint.htm</HelpLink>
   - <ContentLink xmlns="Hyland.Applications.Sharepoint.StatusViewWebPart">http://observer/appnet</ContentLink>

Note: These entries are case sensitive. The **ContentLink** URL in the DWP file must exactly match the **dmsVirtualRoot** value in the Web Server's Web.config, including case. Otherwise, authentication will fail.

4. Save the file and restart IIS.

Note: If you modify the DWP file after activating the Web Part, the Web Part will not reflect your changes. For the Web Part to reflect changes to the DWP file, you must re-upload the Web Part to SharePoint. See Web Part Upload & Activation (SharePoint 2016) on page 16.

5. To configure the Web Part for the Microsoft Secure Store Service (SSS), continue to the following procedures. Otherwise, skip to Web Part Upload & Activation (SharePoint 2016) on page 16.

Enabling the Secure Store Service

To use SharePoint Server 2016's Secure Store Service, you must complete a few additional steps.

The following steps assume that the Secure Store Service service is already installed and configured as described in the following Microsoft TechNet article:
http://technet.microsoft.com/en-us/library/ee806866.aspx.

For more information about the Secure Store Service, see the following Microsoft TechNet article:
http://technet.microsoft.com/en-us/library/ee806889.aspx.

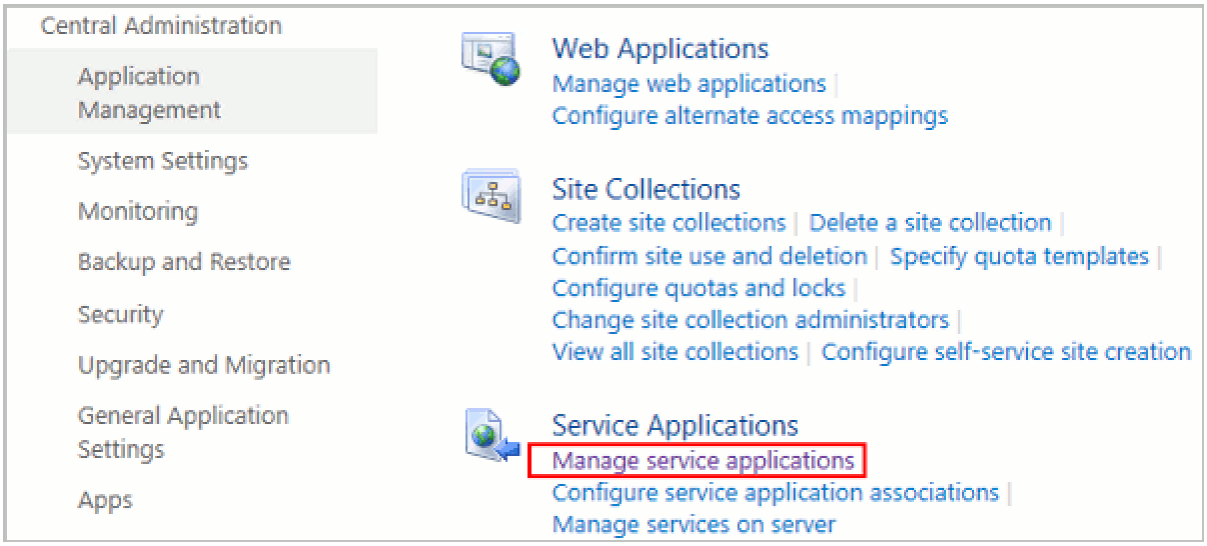
Note: Mixed-mode authentication on a single page is not supported. OnBase Web Parts using different modes of authentication should not be added to the same page.

Continue to the following procedures:

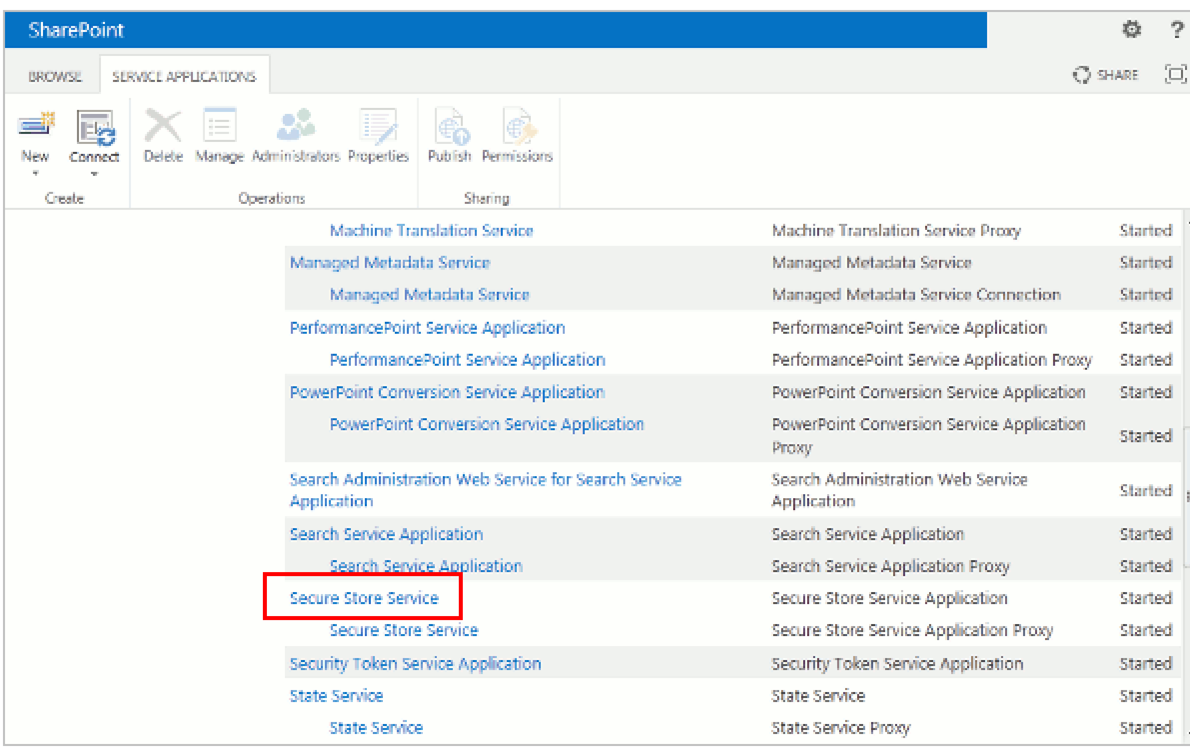
- Setting Up a Secure Store Service Application on page 11
- Mapping Accounts on page 15
- Creating Secure Store Service Accounts on page 15
- Configuring Web Parts for the Secure Store Service on page 15

Setting Up a Secure Store Service Application

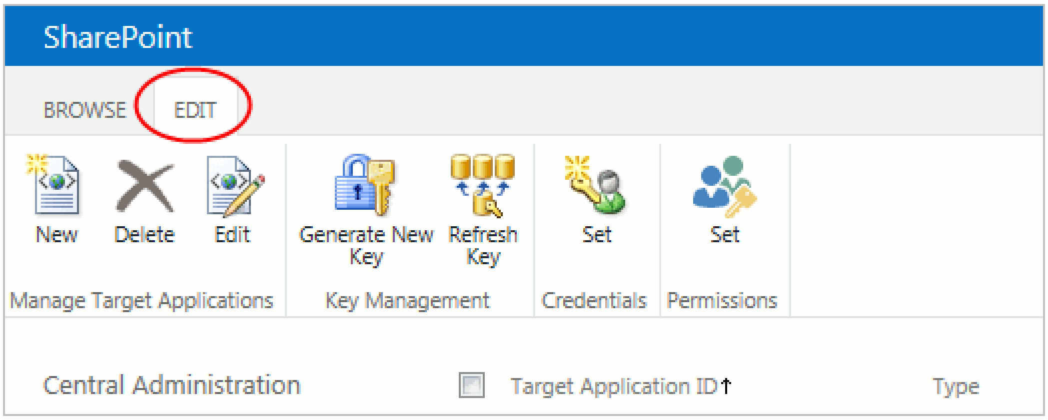
1. Open SharePoint Central Administration.
2. Under **Application Management**, click **Manage Service Applications**.



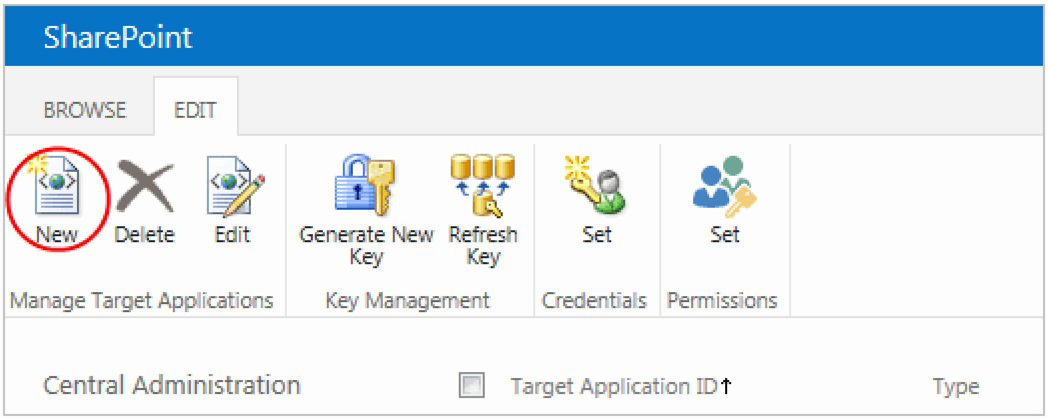
3. Click **Secure Store Service**.



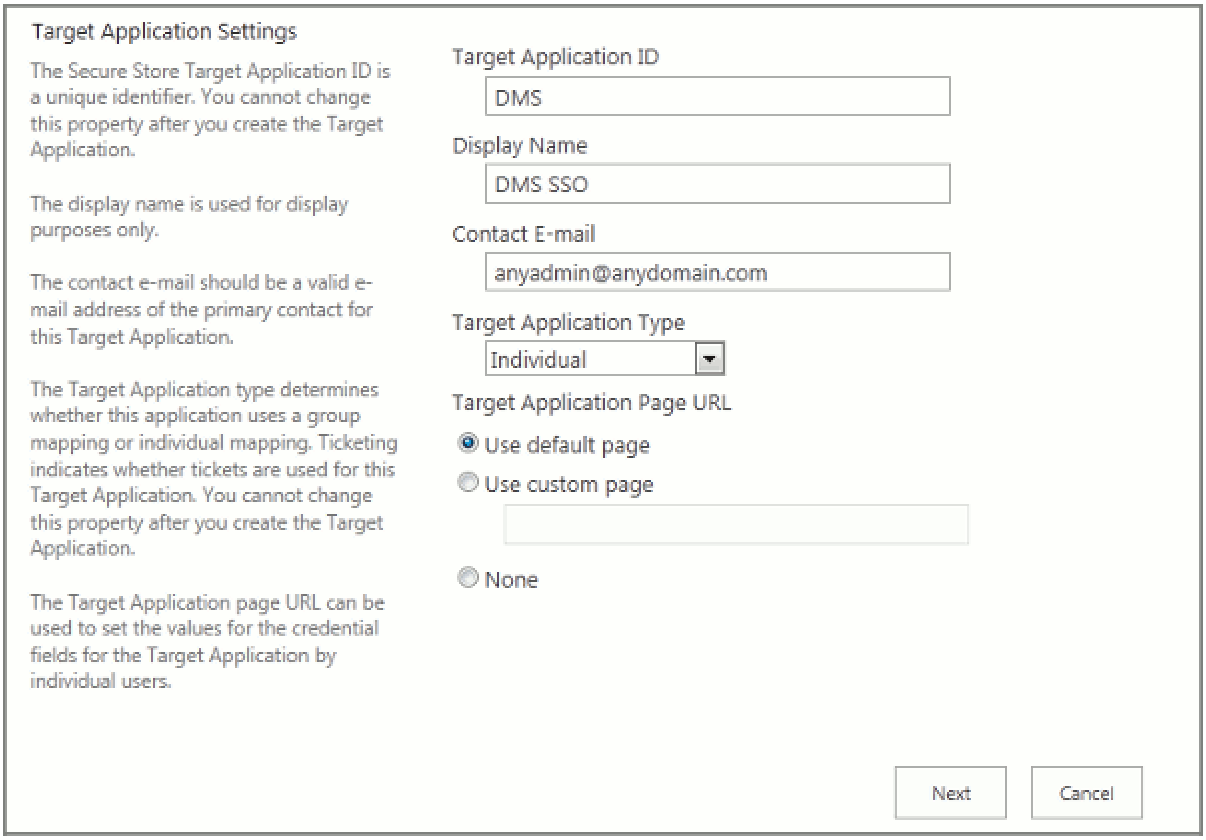
4. Click the **Edit** tab to expose the ribbon contents.



5. Click **New** from the ribbon.



6. Complete the **Target Application Settings**, as shown in the following example:

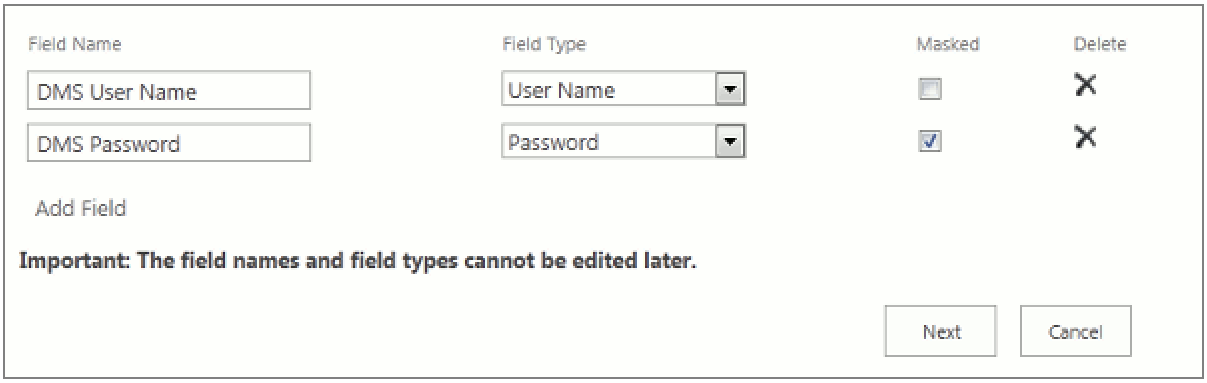


7. Click **Next**.

8. The next steps depend on whether you are using an institutional database.

   For **non-institutional databases**, create two fields:

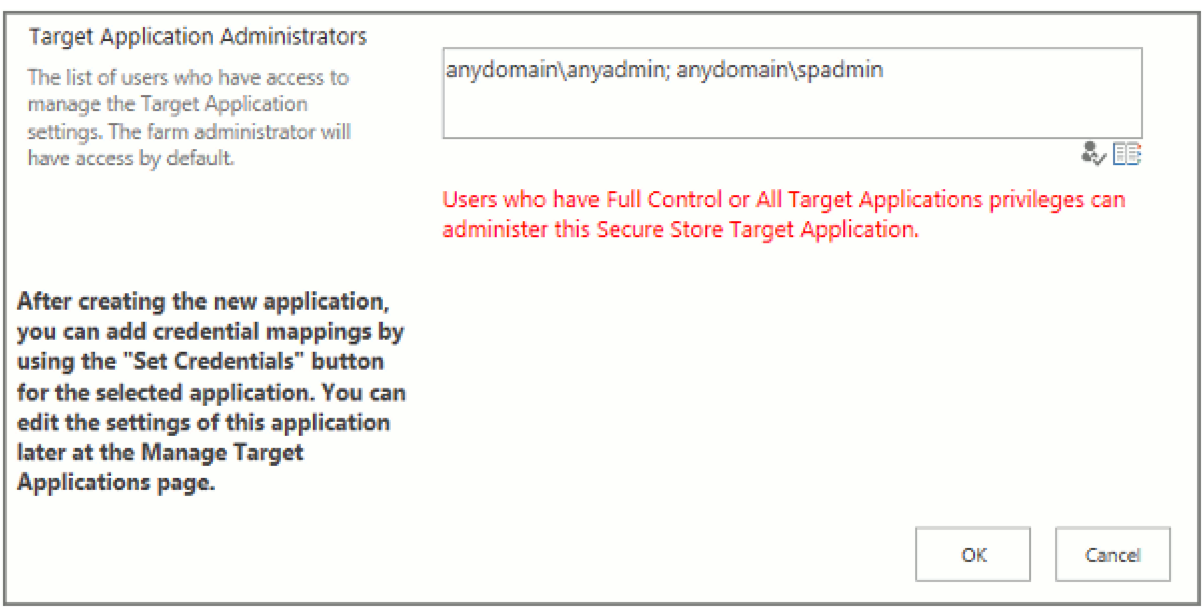
   - A user name field with a Field Type of **User Name**. This field is used for the OnBase user name.
   - A password field with a Field Type of **Password**. This field is used for the OnBase password.



   For **institutional databases** (Layer 2 or Layer 3), create three fields:

   - A user code field with a Field Type of **PIN**. This field is used for the OnBase user code.
   - A password field with a Field Type of **Password**. This field is used for the OnBase password.
   - An institution field with a Field Type of **Key**. This field is used to specify the institution.

9. Click **Next**.
10. Define your **Target Application Administrators**.

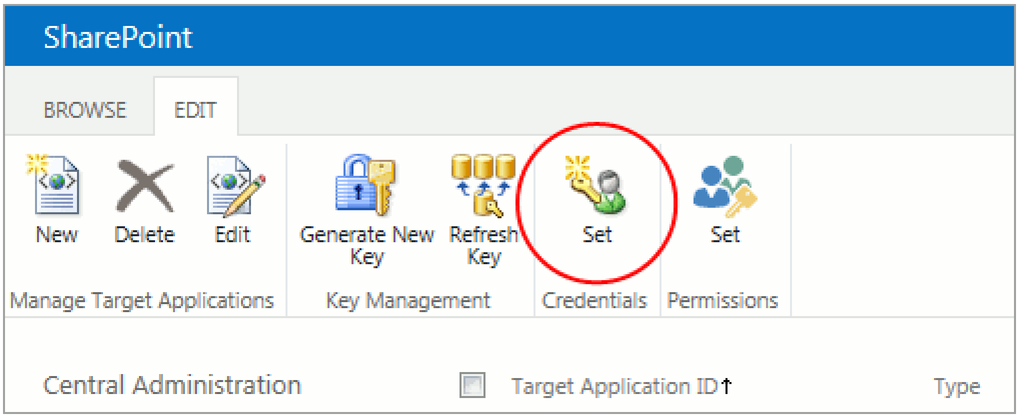


11. Click **OK**. The application is created.
12. To map SharePoint accounts to OnBase accounts, continue to the following procedure: Mapping Accounts on page 15.

    Otherwise, go to Configuring Web Parts for the Secure Store Service on page 15.

Mapping Accounts

1. To pre-populate the SSS database with SharePoint-to-OnBase user name and password mappings, click the **Set** (**Credentials**) button from the **Edit** ribbon.



2. Enter the SharePoint user name in the **Credential Owner** field, and then enter the OnBase user name and password values in their corresponding fields.
3. Click **OK**.
4. Repeat for each Secure Store Service user.
5. Continue to Creating Secure Store Service Accounts.

Creating Secure Store Service Accounts

Once you've created the Secure Store Service accounts in SharePoint, you must configure the corresponding accounts in OnBase.

1. Log on to OnBase Configuration.
2. Select **Users | User Names / Passwords**.
3. Create the Secure Store Service user accounts that you created in SharePoint for the previous procedure.

Configuring Web Parts for the Secure Store Service

1. Ensure the Secure Store Service is running. To check its status, click **Manage services on server** under **System Settings** in Central Administration.
2. In Windows Explorer, browse to the folder appropriate for your SharePoint edition:
   - **SharePoint Server 2016**: C:\Program Files\Common Files\Microsoft Shared\web server extensions\16\TEMPLATE\FEATURES\OnBaseWebPartsforServer2016
3. Open the **OnBaseStatusViewWebpart.dwp** in a text-editing application.

4. Set the following entry to **true**:
   <IsSSO xmlns="Hyland.Applications.Sharepoint.StatusViewWebPart">true</IsSSO>
5. For the following element, modify **App=OnBase** to specify the Secure Store Service application name you created in SharePoint Central Administration:
   <PathToSSOEntryPage xmlns="Hyland.Applications.Sharepoint.StatusViewWebPart">https://SPS_Server:SPS_SSL_Port/_layouts/1033/ssologon.aspx?App=OnBase</PathToSSOEntryPage>

Note: The URL does not need to be modified. The only value used in SharePoint 2016 is the **App=** value.

6. To allow users to change their Secure Store Service credentials using StatusView Web Parts, ensure the following entry is set to **true**:
   <AllowUserSSOManagement xmlns="Hyland.Applications.Sharepoint.StatusViewWebPart">true</AllowUserSSOManagement>
7. Continue to Web Part Upload & Activation (SharePoint 2016) on page 16.

Using a Secure Store Service Web Part for the First Time

If the user accessing a SharePoint Web Part page does not have an account mapped to his or her NT login ID in the SharePoint Server SSS database, the user will be presented a link to a form that will allow the user to enter his or her OnBase credentials into the SSS server database. After the login information is added, the user is re-directed back the Web Part page.

Web Part Upload & Activation (SharePoint 2016)

Once you've configured the Web Part DWP file, you must upload and activate it for your SharePoint site.

1. Go to the top-level site for your Web application (e.g., http://servername:80/default.aspx).
2. Click the **Settings** gear icon and select **Site Settings**.
3. Under **Web Designer Galleries**, click **Web Parts**.
4. Click the **Files** tab.
5. Click the **Upload Document** button.
6. Browse to the **OnBaseStatusViewWebpart.dwp** file and click **OK**.
7. Click **Save** to confirm the settings.
8. Select **Settings | Site Settings**.
9. Under **Site Collection Administration**, click **Site Collection Features**.
10. Next to the **OnBase StatusView Web Part**, click **Activate**.

11. Add the Web Part to your SharePoint Web pages and configure them to display OnBase information. See Configuration on page 44.

Note: If the Web Part does not work properly, verify that the OnBase server URL is correct by viewing the Web Part's XML in the Web Part gallery. If the URL is incorrect, edit the DWP file and re-upload it to the site's Web Part gallery. For additional troubleshooting steps, see Troubleshooting on page 35.

StatusView Web Part Installation with SharePoint Online 2016

The following section describes how to install Web Parts for Microsoft SharePoint to your SharePoint Online 2016 site.

To install Web Parts to your SharePoint Online 2016 site:

1. From your App Catalog site, click the **Apps for SharePoint** option, located on the left pane of the screen.
   The **Apps for SharePoint** screen is displayed.
2. Click the **new app** button.
   The **Add a document** dialog box is displayed.
3. Browse and select the **Hyland.Applications.SharePoint15.StatusViewWebPart.app** file. The app file is located in the **\Sharepoint\SharePoint 2016\Web Parts\App** folder.
4. Click **OK**.
   After a few moments, the **Apps for SharePoint - Hyland.Applications.SharePoint15.StatusViewWebPart.app** dialog box is displayed. From here, you can choose to update the properties of the document.
5. Click the **Save** button.
6. From the **Apps for SharePoint** screen, ensure the **Valid App Package** column reads **Yes**.
7. Click the **Settings** gear icon and select **Add an App**.
   The **Site Contents | Your Apps** screen is displayed.
8. Select the **From Your Organization** option from the left pane.
9. Click the icon for the **StatusView Web Parts** app.
   The **Do you trust StatusView Web Parts?** dialog box is displayed.
10. Click **Trust It**.
    The **Site Contents** screen is displayed and Status View Web Parts is successfully installed.

Configuring the Web Server for Use with SharePoint Online 2016

The following sections discuss steps to configuring your Web Server for use with SharePoint Online 2016.

- Editing the Web Server Web.Config File on page 18
- Configuring Cross-Domain Settings on page 18
- Configuring the Cookie Handling Setting on page 19
- Configuring Active Directory Enhanced Settings on page 20

Editing the Web Server Web.Config File

In order to use SharePoint Online, you must edit the SharePointOnline setting in the Web Server's web.config file.

To edit the web.config file:

1. Locate the **web.config** file from the Web Server's virtual directory, which is named **AppNet** in a default installation.
2. Open the web.config file in a plain-text editor, such as Notepad.

Note: The *.config file should only be edited in a plain-text editor, such as Notepad, or a utility specifically designed to edit XML files. It should not be edited in a binary editor, such as Microsoft Word. Using a binary editor can introduce invalid characters to the file and make it unreadable by the software.

3. Locate the **SharePointOnline** setting.
4. Set the value of the **value** attribute to **true** to activate SharePoint Online.
5. Save and close the web.config file.

Configuring Cross-Domain Settings

When using Web Parts for Microsoft SharePoint to request information from the OnBase Web Server, you must configure the Web Server to allow these requests from SharePoint in the Web Server web.config file.

To configure cross-domain settings:

1. Locate the **web.config** file of the OnBase Web Server. In a default installation, this is located at **C:\inetpub\wwwroot\AppNet**.
2. Open the web.config file in a plain-text editor, such as Notepad.

Note: The *.config file should only be edited in a plain-text editor, such as Notepad, or a utility specifically designed to edit XML files. It should not be edited in a binary editor, such as Microsoft Word. Using a binary editor can introduce invalid characters to the file and make it unreadable by the software.

3. Locate the **customHeaders** element that is a child of the **httpProtocol** element.

4. In the **customHeaders** element, locate the **add** elements with the following values for their **name** attributes:
   - `X-Content-Type-Options`
   - `X-Frame-Options`
5. Remove the elements named **X-Content-Type-Options** and **X-Frame-Options** from the file.
6. Add the following elements exactly as listed here:
   ```
   <add name="Access-Control-Allow-Origin" value="" />
   <add name="Access-Control-Allow-Methods" value="GET, PUT, POST,
   DELETE, HEAD, OPTIONS" />
   <add name="Access-Control-Allow-Credentials" value="true" />
   <add name="Access-Control-Allow-Headers" value="X-Requested-With,
   origin, content-type, accept, x-auth-token, authorization" />
   ```
7. Locate the **add** element with the **name** attribute value of **Access-Control-Allow-Origin**.
8. Change the value of the **value** attribute to the URL of the SharePoint server. For example:
   - If SSL is configured, enter the following: `value="https://machinename.domain.net"` where **machinename** is the name of the SharePoint server and **domain** is the name of the domain on which the SharePoint server resides.
   - If SSL is not configured, enter the following: `value="http://machinename"` where **machinename** is the name of the SharePoint server.
9. Save and close the web.config file.
10. Recycle the application pool of the Web Server for these changes to take effect.

Configuring the Cookie Handling Setting

If you are using an up-to-date web browser with the latest .NET patch installed, the SameSite cookie setting in the Web Server web.config file must be updated to enable cross-site cookie use between the OnBase Web Server and Microsoft SharePoint.

To configure the cookie handling setting:

1. Locate the **web.config** file of the OnBase Web Server. In a default installation, this is located at **C:\inetpub\wwwroot\AppNet**.
2. Open the web.config file in a plain-text editor, such as Notepad.

Note: The *.config file should only be edited in a plain-text editor, such as Notepad, or a utility specifically designed to edit XML files. It should not be edited in a binary editor, such as Microsoft Word. Using a binary editor can introduce invalid characters to the file and make it unreadable by the software.

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3. Locate the **cookieSameSite** attribute in the **sessionState** element. If this attribute is not in the web.config file, then you must add it under **<system.web>** within the **sessionState** element exactly as listed here:
   ```
   <system.web>
   ```

```
<sessionState cookieSameSite="value" />
```

4. Enter **None** as the value. For example, the attribute would be entered as `cookieSameSite="None"`
5. Save and close the web.config file.
6. Recycle the application pool of the Web Server for these changes to take effect.

Configuring Active Directory Enhanced Settings

If your Web Server is configured to use Active Directory Enhanced, modifications must be made to effectively use Web Parts for Microsoft SharePoint. The following sections describe the different settings that must be configured.

Enabling Impersonation

Identity impersonation must be enabled on the Web Server when using Active Directory Enhanced. Impersonation can be configured when running the Web Server installer, configuring the option in the Web Application Management Console, or configuring the option manually.

For more information on configuring impersonation using the Web Server installer, see the Installation chapter in the **Web Server** documentation.

For more information on configuring impersonation using the Web Application Management Console, see the section on configuring impersonation in the **Web Application Management Console** documentation.

For more information on configuring impersonation manually, see the section on enabling impersonation in the **Web Server** documentation.

Configuring Optimization for Windows Authentication

If your Web Server is configured for Active Directory Enhanced, the Web Server must be configured to be optimized for Windows Authentication to use Web Parts for Microsoft SharePoint. This is configured using the Web Application Management Console which is automatically installed after a successful installation of the Web Server.

To configure optimization for Windows Authentication:

1. In the Web Application Management Console, click **Open Web Application**. The **Web Application Management Console** dialog box is displayed.
2. Select your Application Server from the **Web Application** column.
3. Click **OK**.
4. Select **Tools | Optimize for Windows Authentication**. A confirmation dialog box confirming you want to modify the Application Server's web.config file is displayed.
5. Click **Yes**. Your Application Server is now configured for optimization for Windows Authentication.

StatusView Web Part Installation with SharePoint 2019

The following procedures describe how to install Web Parts for Microsoft SharePoint using SharePoint Server 2019.

- Running the Installer (SharePoint 2019) on page 21
- Web Part Configuration (SharePoint 2019) on page 24
- Web Part Upload & Activation (SharePoint 2019) on page 30

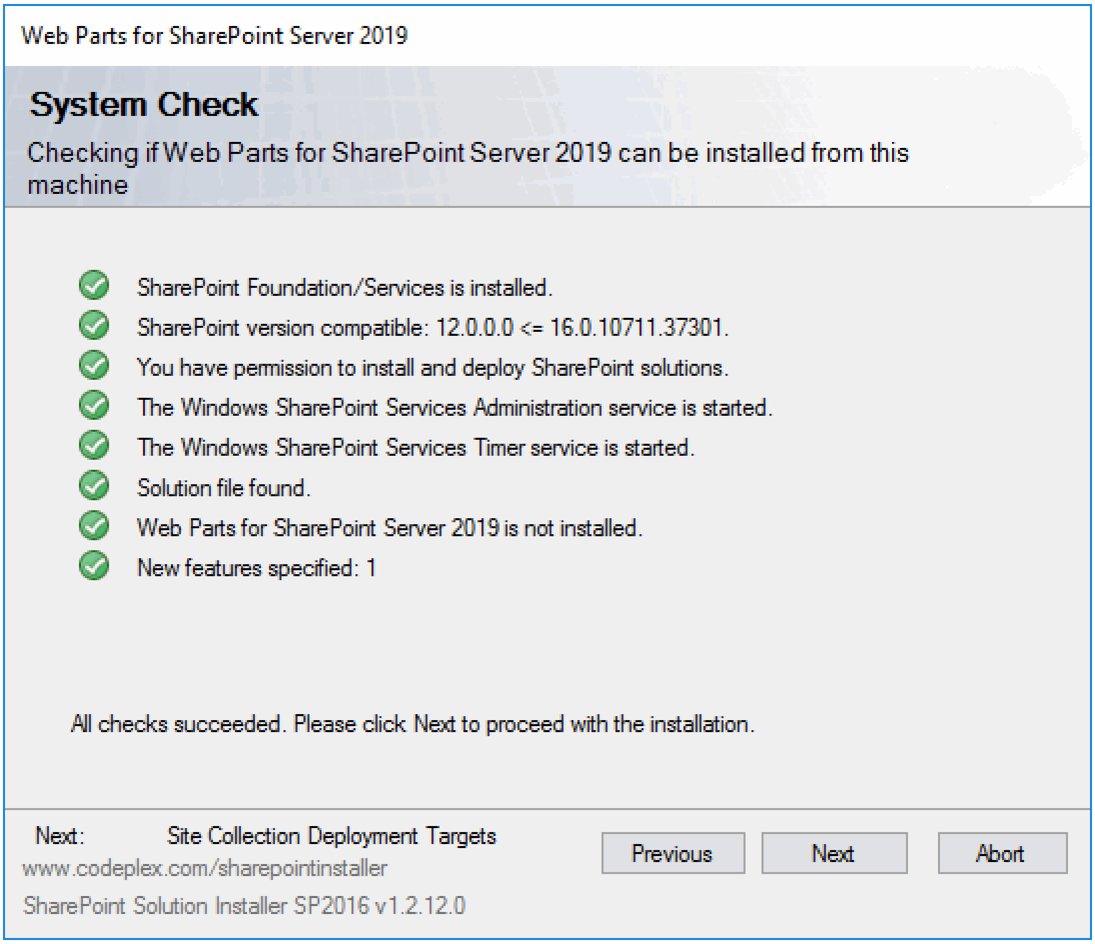
Running the Installer (SharePoint 2019)

You can install the Web Part to a server running SharePoint Server 2019.

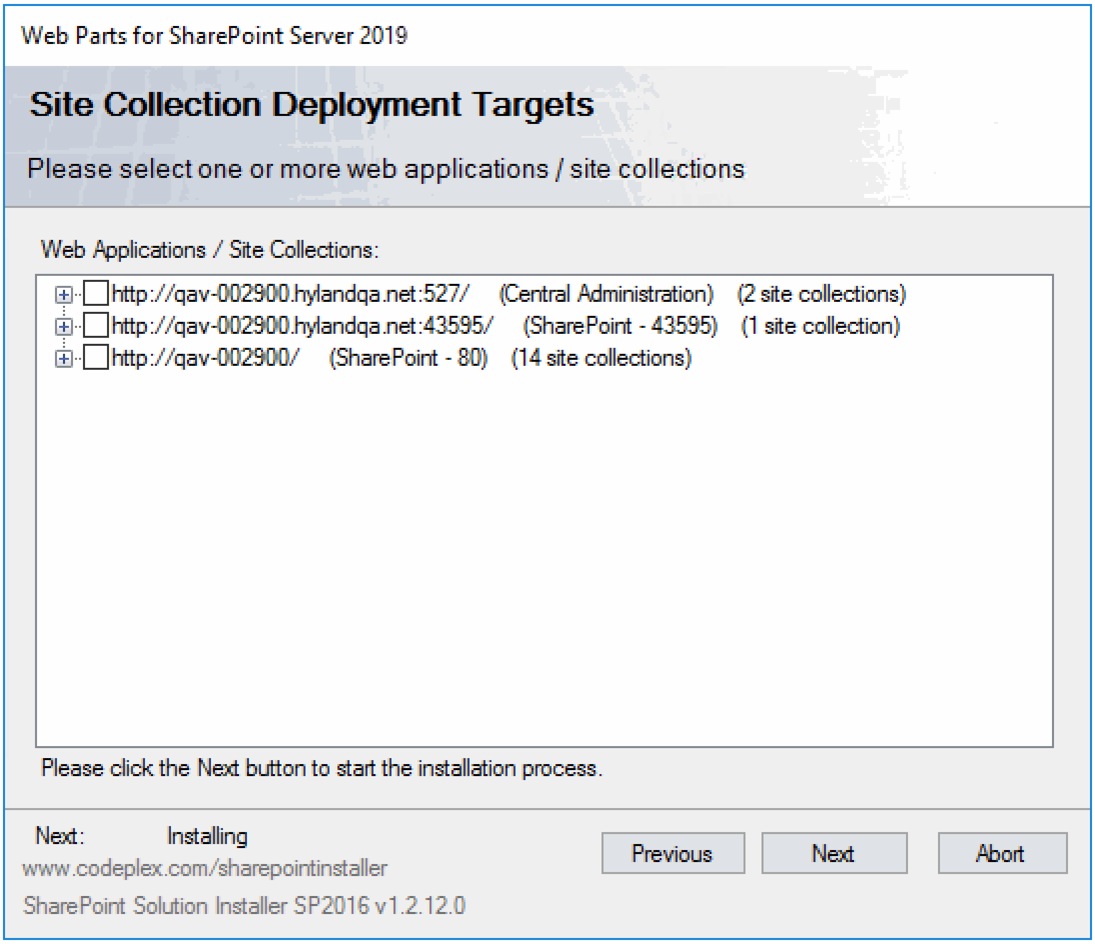
To install the Web Part to a server running SharePoint Server 2019:

1. Double-click on the **Setup2019.exe** to begin installation. The setup file resides in the following directory of the Core Services build:
   ..\install\Sharepoint\SharePoint 2019\Web Parts\SharePoint Server 2019
2. From the welcome screen, click **Next**.

3. Wait while the installer checks whether Web Parts can be installed on the server.



4. If a check fails, address the issue and start again. If all checks succeed, click **Next**. The **Deployment Targets** screen displays the Web applications available for deployment.



5. Ensure only the Web applications you want to deploy Web Parts for Microsoft SharePoint to are selected. You can expand a Web application to view and select specific site collections, also.
6. Click **Next**. The installer distributes the files required to set up Web Parts for Microsoft SharePoint.

   If the deployment is successful, the **Installation Successfully Completed** screen displays each Web Front End machine to which the solution was deployed.

Note: If the installation fails, re-run the installer. SharePoint places locks on certain files, which may prevent a successful installation. If the installation is unsuccessful after several attempts, reboot the server and try again.

7. Click **Close**.
8. Configure the Web Part with your OnBase Web Server URL. See Web Part Configuration (SharePoint 2019) on page 24.

Web Part Configuration (SharePoint 2019)

You can configure Web Part Configuration with your OnBase Web Server URL.

To configure Web Part Configuration:

1. In Windows Explorer, browse to the folder appropriate for your SharePoint edition:
   - **SharePoint Server 2019**: C:\Program Files\Common Files\Microsoft Shared\web server extensions\15\TEMPLATE\FEATURES\OnBaseWebPartsforServer2019
2. Open the **OnBaseStatusViewWebpart.dwp** in a text-editing application.
3. In the following two nodes, change **observer/AppNet** to your OnBase Web Server URL:
   - <HelpLink>http://observer/Appnet/Help/Sharepoint/Sharepoint.htm</HelpLink>
   - <ContentLink xmlns="Hyland.Applications.Sharepoint.StatusViewWebPart">http://observer/appnet</ContentLink>

Note: These entries are case sensitive. The **ContentLink** URL in the DWP file must exactly match the **dmsVirtualRoot** value in the Web Server's Web.config, including case. Otherwise, authentication will fail.

4. Save the file and restart IIS.

Note: If you modify the DWP file after activating the Web Part, the Web Part will not reflect your changes. For the Web Part to reflect changes to the DWP file, you must re-upload the Web Part to SharePoint. See Web Part Upload & Activation (SharePoint 2019) on page 30.

5. To configure the Web Part for the Microsoft Secure Store Service (SSS), continue to the following procedures. Otherwise, skip to Web Part Upload & Activation (SharePoint 2019) on page 30.

Enabling the Secure Store Service

To use SharePoint Server 2019's Secure Store Service, you must complete a few additional steps.

The following steps assume that the Secure Store Service service is already installed and configured as described in the following Microsoft TechNet article: http://technet.microsoft.com/en-us/library/ee806866.aspx.

For more information about the Secure Store Service, see the following TechNet article: http://technet.microsoft.com/en-us/library/ee806889.aspx.

Note: Mixed-mode authentication on a single page is not supported. OnBase Web Parts using different modes of authentication should not be added to the same page.

Continue to the following procedures:

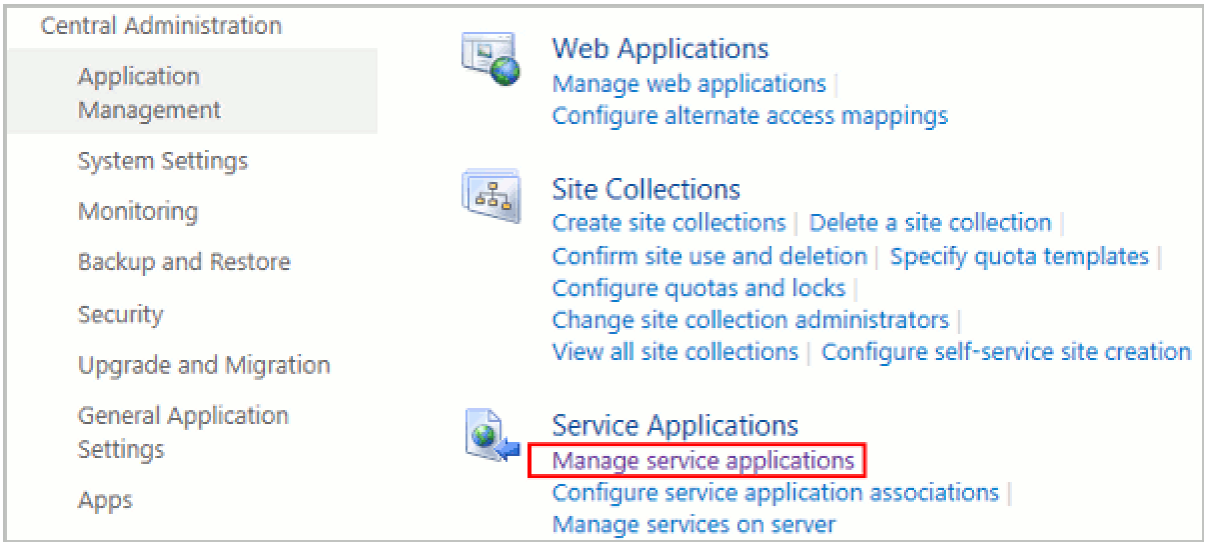
- Setting Up a Secure Store Service Application on page 25
- Mapping Accounts on page 29
- Creating Secure Store Service Accounts on page 29
- Configuring Web Parts for the Secure Store Service on page 29

Setting Up a Secure Store Service Application

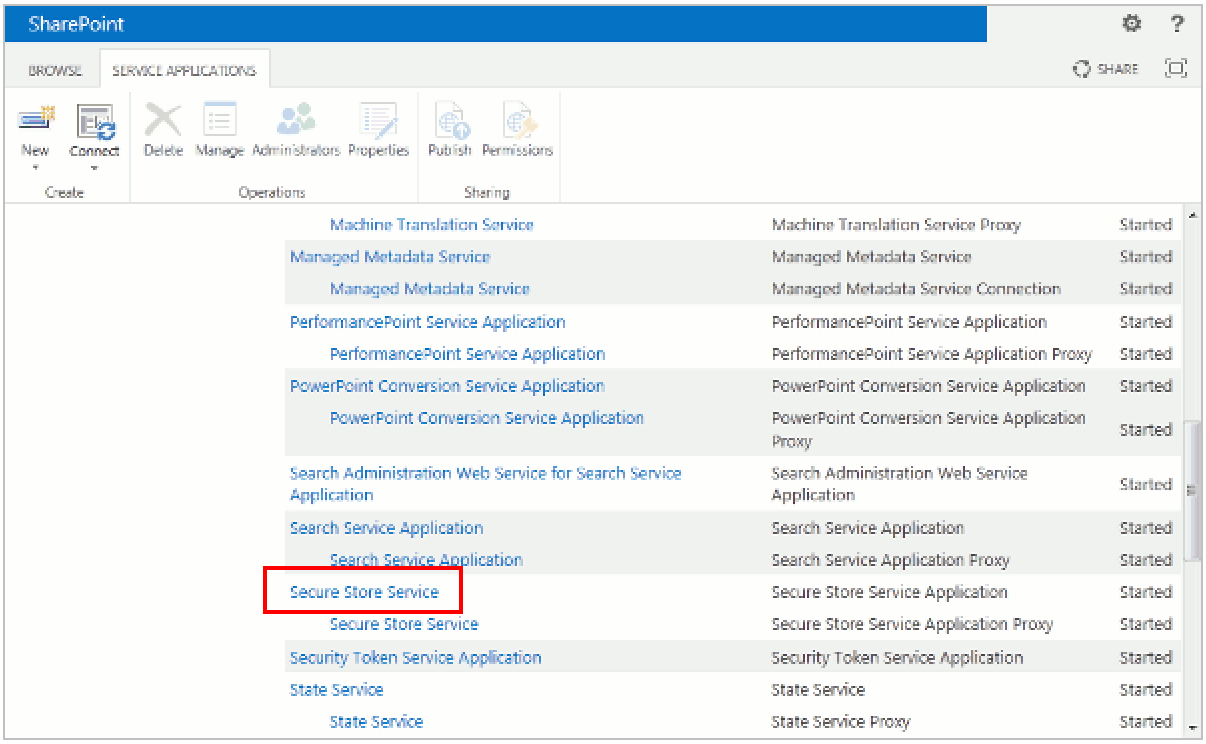
You can set up a Secure Store Service application once a Secure Store Service service is installed and configured.

To set up a Secure Store Service application:

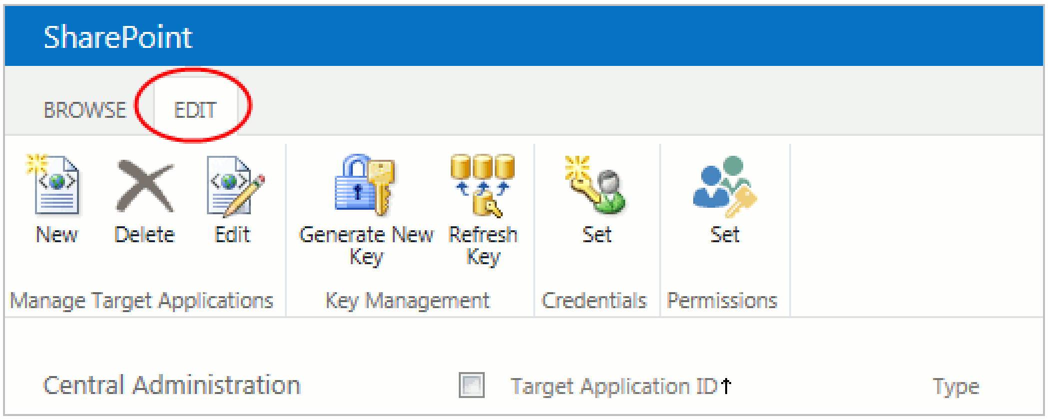
1. Open SharePoint Central Administration.
2. Under **Application Management**, click **Manage Service Applications**.



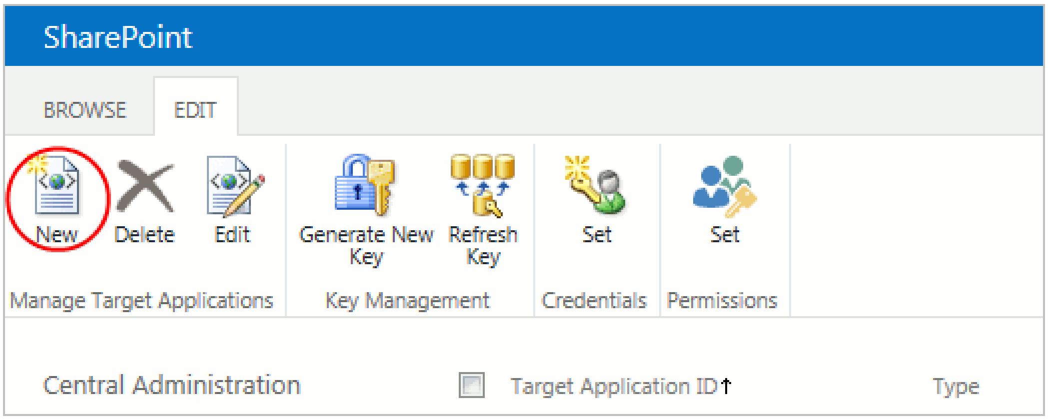
3. Click **Secure Store Service**.



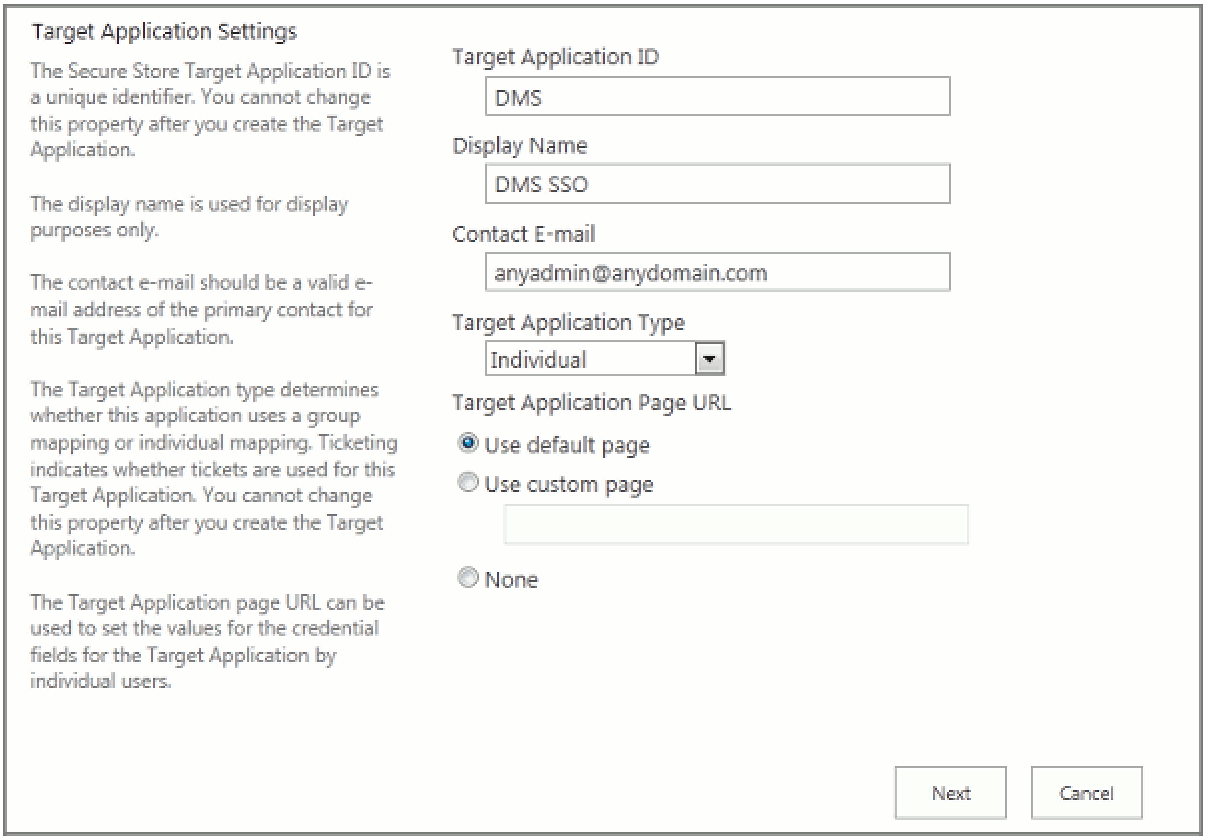
4. Click the **Edit** tab to expose the ribbon contents.



5. Click **New** from the ribbon.



6. Complete the **Target Application Settings**, as shown in the following example:

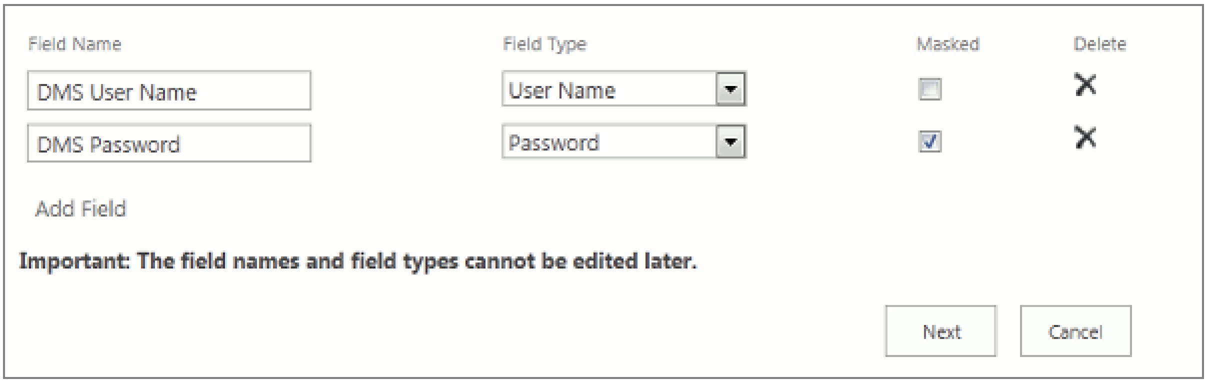


7. Click **Next**.

8. The next steps depend on whether you are using an institutional database.

   For **non-institutional databases**, create two fields:

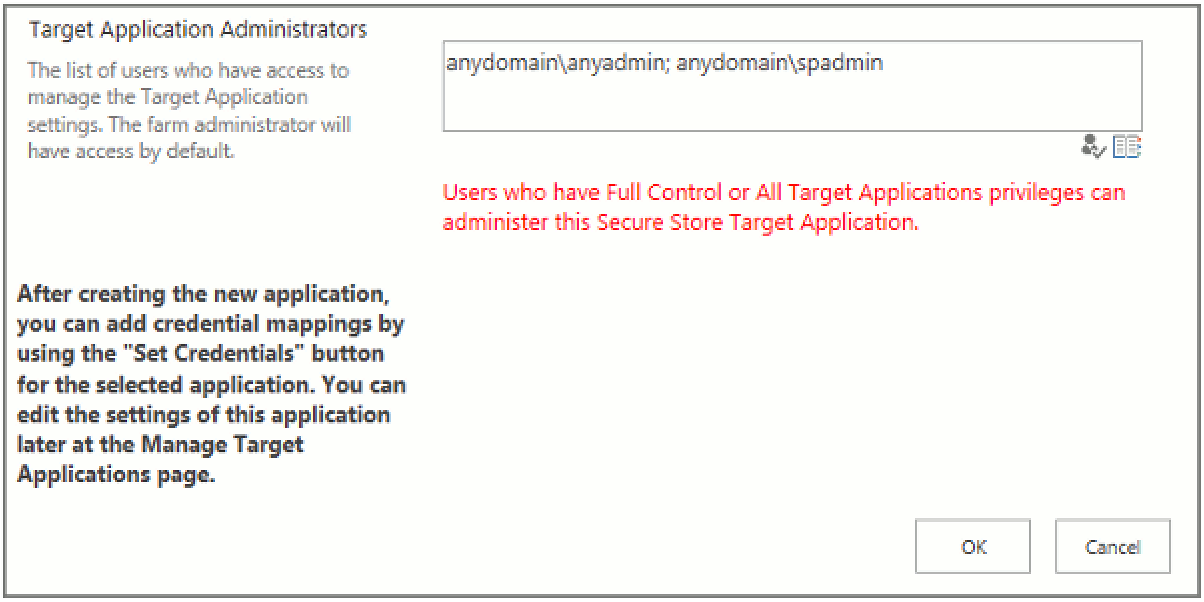
   - A user name field with a Field Type of **User Name**. This field is used for the OnBase user name.
   - A password field with a Field Type of **Password**. This field is used for the OnBase password.



   For **institutional databases** (Layer 2 or Layer 3), create three fields:

   - A user code field with a Field Type of **PIN**. This field is used for the OnBase user code.
   - A password field with a Field Type of **Password**. This field is used for the OnBase password.
   - An institution field with a Field Type of **Key**. This field is used to specify the institution.

9. Click **Next**.
10. Define your **Target Application Administrators**.



11. Click **OK**. The application is created.
12. To map SharePoint accounts to OnBase accounts, continue to the following procedure: Mapping Accounts on page 29.

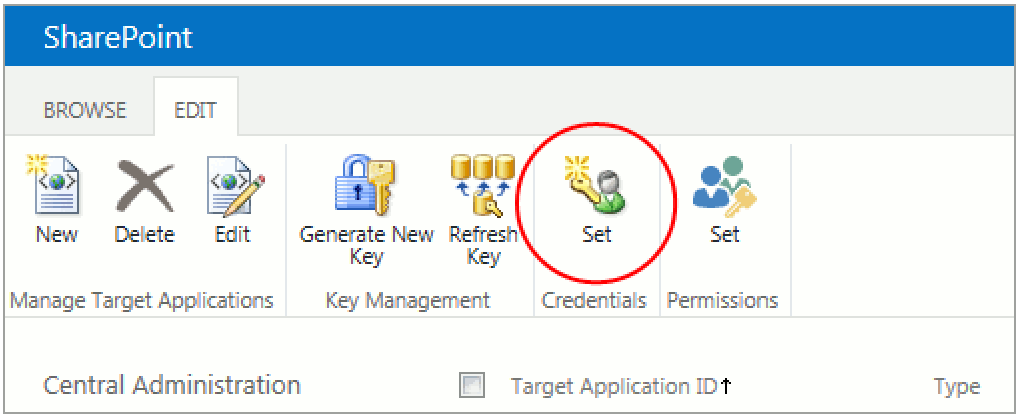
    Otherwise, go to Configuring Web Parts for the Secure Store Service on page 29.

Mapping Accounts

You can map SharePoint and OnBase user accounts to pre-populate the Secure Store Service database.

To map SharePoint and OnBase user accounts to the Secure Store Service database:

1. To pre-populate the SSS database with SharePoint-to-OnBase user name and password mappings, click the **Set** (**Credentials**) button from the **Edit** ribbon.



2. Enter the SharePoint user name in the **Credential Owner** field, and then enter the OnBase user name and password values in their corresponding fields.
3. Click **OK**.
4. Repeat for each Secure Store Service user.
5. Continue to Creating Secure Store Service Accounts on page 29.

Creating Secure Store Service Accounts

Once you've created the Secure Store Service accounts in SharePoint, you must configure the corresponding accounts in OnBase.

To create Secure Store Service accounts in OnBase:

1. Log on to OnBase Configuration.
2. Select **Users | User Names / Passwords**.
3. Create the Secure Store Service user accounts that you created in SharePoint for the previous procedure.

Configuring Web Parts for the Secure Store Service

You can configure Web Parts for the Secure Store Service.

To configure Web Parts for the Secure Store Service:

1. Ensure the Secure Store Service is running. To check its status, click **Manage services on server** under **System Settings** in Central Administration.
2. In Windows Explorer, browse to the folder appropriate for your SharePoint edition:
   - **SharePoint Server 2019**: C:\Program Files\Common Files\Microsoft Shared\web server extensions\16\TEMPLATE\FEATURES\OnBaseWebPartsforServer2019
3. Open the **OnBaseStatusViewWebpart.dwp** in a text-editing application.
4. Set the following entry to **true**:

   <IsSSO xmlns="Hyland.Applications.Sharepoint.StatusViewWebPart">true</IsSSO>
5. For the following element, modify **App=OnBase** to specify the Secure Store Service application name you created in SharePoint Central Administration:

   <PathToSSOEntryPage xmlns="Hyland.Applications.Sharepoint.StatusViewWebPart">https://SPS_Server:SPS_SSL_Port/_layouts/1033/ssologon.aspx?App=OnBase</PathToSSOEntryPage>

Note: The URL does not need to be modified. The only value used in SharePoint 2019 is the **App=** value.

6. To allow users to change their Secure Store Service credentials using StatusView Web Parts, ensure the following entry is set to **true**:

   <AllowUserSSOManagement xmlns="Hyland.Applications.Sharepoint.StatusViewWebPart">true</AllowUserSSOManagement>
7. Continue to Web Part Upload & Activation (SharePoint 2019) on page 30.

Using a Secure Store Service Web Part for the First Time

If the user accessing a SharePoint Web Part page does not have an account mapped to his or her NT login ID in the SharePoint Server SSS database, the user will be presented a link to a form that will allow the user to enter his or her OnBase credentials into the SSS server database. After the login information is added, the user is re-directed back the Web Part page.

Web Part Upload & Activation (SharePoint 2019)

Once you've configured the Web Part DWP file, you must upload and activate it for your SharePoint site.

To upload and activate the Web Part DWP file:

1. Go to the top-level site for your Web application (e.g., http://servername:80/default.aspx).
2. Click the **Settings** gear icon and select **Site Settings**.
3. Under **Web Designer Galleries**, click **Web Parts**.
4. Click the **Files** tab.
5. Click the **Upload Document** button.

6. Browse to the **OnBaseStatusViewWebpart.dwp** file and click **OK**.
7. Click **Save** to confirm the settings.
8. Select **Settings | Site Settings**.
9. Under **Site Collection Administration**, click **Site Collection Features**.
10. Next to the **OnBase StatusView Web Part**, click **Activate**.
11. Add the Web Part to your SharePoint Web pages and configure them to display OnBase information. See Configuration on page 44.

Note: If the Web Part does not work properly, verify that the OnBase server URL is correct by viewing the Web Part's XML in the Web Part gallery. If the URL is incorrect, edit the DWP file and re-upload it to the site's Web Part gallery. For additional troubleshooting steps, see Troubleshooting on page 35.

StatusView Web Part Installation with SharePoint Online 2019

The following section describes how to install Web Parts for Microsoft SharePoint to your SharePoint Online 2019 site.

To install Web Parts to your SharePoint Online 2019 site:

1. From your App Catalog site, click the **Apps for SharePoint** option, located on the left pane of the screen.

   The **Apps for SharePoint** screen is displayed.
2. Click the **new app** button.

   The **Add a document** dialog box is displayed.
3. Browse and select the **Hyland.Applications.SharePoint15.StatusViewWebPart.app** file. The app file is located in the **\Sharepoint\SharePoint 2019\Web Parts\App** folder.
4. Click **OK**.

   After a few moments, the **Apps for SharePoint - Hyland.Applications.SharePoint15.StatusViewWebPart.app** dialog box is displayed. From here, you can choose to update the properties of the document.
5. Click the **Save** button.
6. From the **Apps for SharePoint** screen, ensure the **Valid App Package** column reads **Yes**.
7. Click the **Settings** gear icon and select **Add an App**.

   The **Site Contents | Your Apps** screen is displayed.
8. Select the **From Your Organization** option from the left pane.
9. Click the icon for the **StatusView Web Parts** app.

   The **Do you trust StatusView Web Parts?** dialog box is displayed.
10. Click **Trust It**.

    The **Site Contents** screen is displayed and Status View Web Parts is successfully installed.

Configuring the Web Server for use with SharePoint Online 2019

The following sections discuss steps to configuring your Web Server for use with SharePoint Online 2016.

- Editing the Web Server Web.Config File on page 32
- Configuring Cross-Domain Settings on page 32
- Configuring the Cookie Handling Setting on page 33
- Configuring Active Directory Enhanced Settings on page 34

Editing the Web Server Web.Config File

In order to use SharePoint Online, you must edit the SharePointOnline setting in the Web Server's web.config file.

To edit the web.config file:

1. Locate the **web.config** file from the Web Server's virtual directory, which is named **AppNet** in a default installation.
2. Open the web.config file in a plain-text editor, such as Notepad.

Note: The *.config file should only be edited in a plain-text editor, such as Notepad, or a utility specifically designed to edit XML files. It should not be edited in a binary editor, such as Microsoft Word. Using a binary editor can introduce invalid characters to the file and make it unreadable by the software.

3. Locate the **SharePointOnline** setting.
4. Set the value of the **value** attribute to **true** to activate SharePoint Online.
5. Save and close the web.config file.

Configuring Cross-Domain Settings

When using Web Parts for Microsoft SharePoint to request information from the OnBase Web Server, you must configure the Web Server to allow these requests from SharePoint in the Web Server web.config file.

To configure cross-domain settings:

1. Locate the **web.config** file of the OnBase Web Server. In a default installation, this is located at **C:\inetpub\wwwroot\AppNet**.
2. Open the web.config file in a plain-text editor, such as Notepad.

Note: The *.config file should only be edited in a plain-text editor, such as Notepad, or a utility specifically designed to edit XML files. It should not be edited in a binary editor, such as Microsoft Word. Using a binary editor can introduce invalid characters to the file and make it unreadable by the software.

3. Locate the **customHeaders** element that is a child of the **httpProtocol** element.

4. In the **customHeaders** element, locate the **add** elements with the following values for their **name** attributes:
   - `X-Content-Type-Options`
   - `X-Frame-Options`
5. Remove the elements named **X-Content-Type-Options** and **X-Frame-Options** from the file.
6. Add the following elements exactly as listed here:
```
<add name="Access-Control-Allow-Origin" value="" />
<add name="Access-Control-Allow-Methods" value="GET, PUT, POST,
DELETE, HEAD, OPTIONS" />
<add name="Access-Control-Allow-Credentials" value="true" />
<add name="Access-Control-Allow-Headers" value="X-Requested-With,
origin, content-type, accept, x-auth-token, authorization" />
```
7. Locate the **add** element with the **name** attribute value of **Access-Control-Allow-Origin**.
8. Change the value of the **value** attribute to the URL of the SharePoint server. For example:
   - If SSL is configured, enter the following: `value="https://machinename.domain.net"` where **machinename** is the name of the SharePoint server and **domain** is the name of the domain on which the SharePoint server resides.
   - If SSL is not configured, enter the following: `value="http://machinename"` where **machinename** is the name of the SharePoint server.
9. Save and close the web.config file.
10. Recycle the application pool of the Web Server for these changes to take effect.

Configuring the Cookie Handling Setting

If you are using an up-to-date web browser with the latest .NET patch installed, the SameSite cookie setting in the Web Server web.config file must be updated to enable cross-site cookie use between the OnBase Web Server and Microsoft SharePoint.

To configure the cookie handling setting:

1. Locate the **web.config** file of the OnBase Web Server. In a default installation, this is located at **C:\inetpub\wwwroot\AppNet**.
2. Open the web.config file in a plain-text editor, such as Notepad.

Note: The *.config file should only be edited in a plain-text editor, such as Notepad, or a utility specifically designed to edit XML files. It should not be edited in a binary editor, such as Microsoft Word. Using a binary editor can introduce invalid characters to the file and make it unreadable by the software.

3. Locate the **cookieSameSite** attribute in the **sessionState** element. If this attribute is not in the web.config file, then you must add it under **<system.web>** within the **sessionState** element exactly as listed here:
```
<system.web>
```

```
<sessionState cookieSameSite="value" />
```

4. Enter **None** as the value. For example, the attribute would be entered as `cookieSameSite="None"`
5. Save and close the web.config file.
6. Recycle the application pool of the Web Server for these changes to take effect.

Configuring Active Directory Enhanced Settings

If your Web Server is configured to use Active Directory Enhanced, modifications must be made to effectively use Web Parts for Microsoft SharePoint. The following sections describe the different settings that must be configured.

Enabling Impersonation

Identity impersonation must be enabled on the Web Server when using Active Directory Enhanced. Impersonation can be configured when running the Web Server installer, configuring the option in the Web Application Management Console, or configuring the option manually.

For more information on configuring impersonation using the Web Server installer, see the Installation chapter in the **Web Server** documentation.

For more information on configuring impersonation using the Web Application Management Console, see the section on configuring impersonation in the **Web Application Management Console** documentation.

For more information on configuring impersonation manually, see the section on enabling impersonation in the **Web Server** documentation.

Configuring Optimization for Windows Authentication

If your Web Server is configured for Active Directory Enhanced, the Web Server must be configured to be optimized for Windows Authentication to use Web Parts for Microsoft SharePoint. This is configured using the Web Application Management Console which is automatically installed after a successful installation of the Web Server.

To configure optimization for Windows Authentication:

1. In the Web Application Management Console, click **Open Web Application**. The **Web Application Management Console** dialog box is displayed.
2. Select your Application Server from the **Web Application** column.
3. Click **OK**.
4. Select **Tools | Optimize for Windows Authentication**. A confirmation dialog box confirming you want to modify the Application Server’s web.config file is displayed.
5. Click **Yes**. Your Application Server is now configured for optimization for Windows Authentication.

Repair or Remove an Installation

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

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

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

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

Troubleshooting

After OnBase Web Parts are added to a SharePoint page, they must be linked to portlets in OnBase. When you click **open the tool pane** from the newly added Web Part, available portlet types are displayed on the right side of the page. If no portlet types are displayed, perform the following troubleshooting steps. These steps can also resolve the **Error getting server name** error message.

1. Ensure portlet types have been configured in OnBase StatusView.
2. Ensure users have been assigned OnBase privileges for the portlet types.
3. On the workstation, add the URLs for the OnBase Web Server and the SharePoint server to the same security zone in Internet Explorer. To add URLs to a security zone.
   a. From the browser window, select **Tools | Internet Options**.
   b. Click the **Security** tab.
   c. Select the appropriate security zone (e.g., Local Intranet).
   d. Click **Sites**.
   e. Type the URL to the OnBase Web Server and click **Add**.
   f. Type the URL to the SharePoint server and click **Add**.
   g. Click **OK** twice to close both dialog boxes.
4. If portlet types are still unavailable, adjust the security settings for the security zone.
   a. From the **Security** tab of the **Internet Options** dialog box, select the security zone.
   b. Click **Custom Level**.

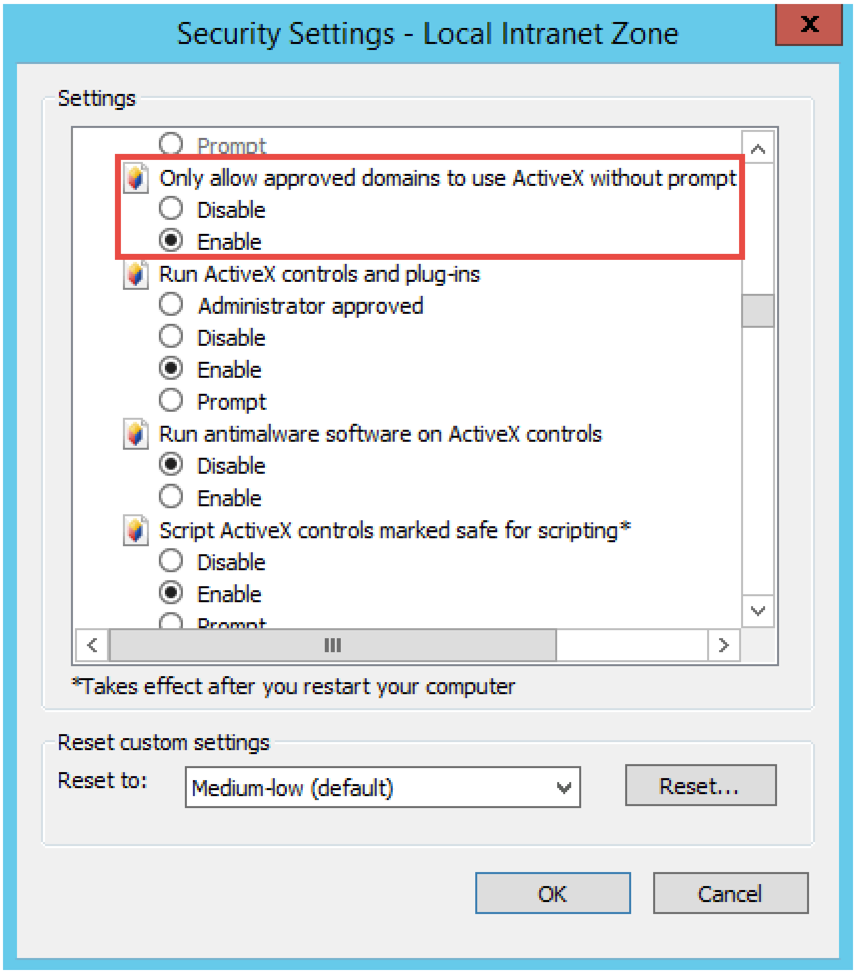
   c. Under **Miscellaneous**, set the following to **Enable** or **Prompt**.
      - **Access data sources across domains**
      - **Navigate sub-frames across different domains**
   d. Under **User Authentication | Logon,** select **Automatic logon with current user name and password**.
   e. Click **OK** twice to close both dialog boxes.
5. If your solution uses Active Directory authentication, ensure that the Web Server is properly configured. See the topic on configuring Active Directory authentication in the Installation chapter of the Web Server module reference guide.
6. If your solution uses HTTPS bindings, see Message from webpage: System error: -2146697208 on page 41.

ActiveX Controls Fail to Load

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

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

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



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

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

ActiveX Control	{CLSID}
HylandDocumentSelect	{C5526B6F-F197-4705-A554-0612494ADD7D}

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

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

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

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

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

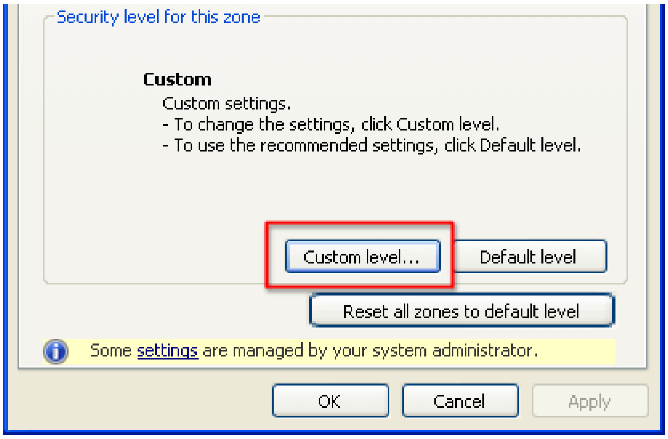
More information about writing registry scripts can be found at the following location: http://support.microsoft.com/kb/310516

Message from webpage: 'null' is null or not an object

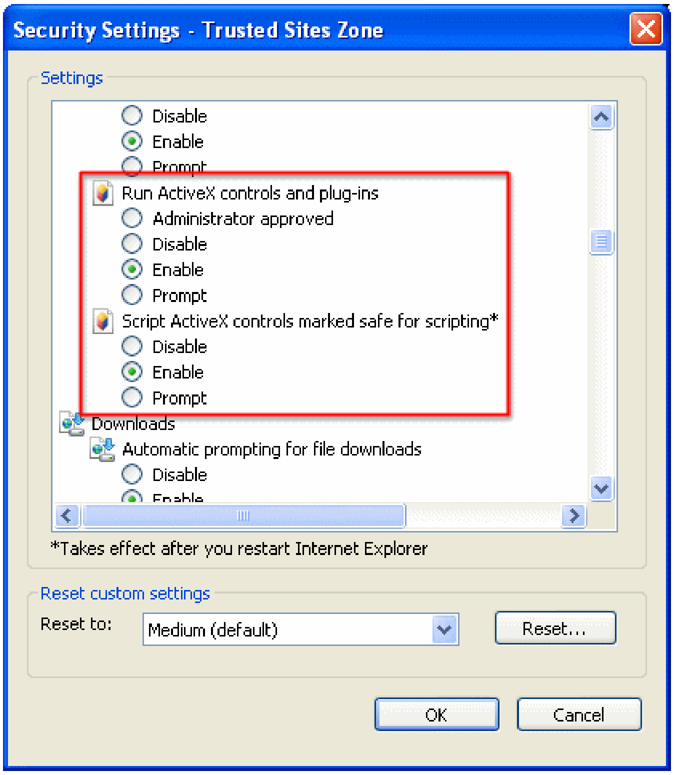
Users may encounter the following message when attempting to configure or render an OnBase Web Part in Microsoft SharePoint:

This message is displayed because two Internet Explorer Security Settings are set incorrectly for the Web Server's security zone. To address this issue, complete the following steps:

1. In Internet Explorer, select **Tools | Internet Options**.
2. Click the **Security** tab.
3. Select the Web Server's security zone.
4. Click the **Custom Level...** button.



5. Under **ActiveX controls and plug-ins**, set the following settings to **Enable**:
   - **Run ActiveX controls and plugins**
   - **Script ActiveX controls marked as safe for scripting**



6. Click **OK**.

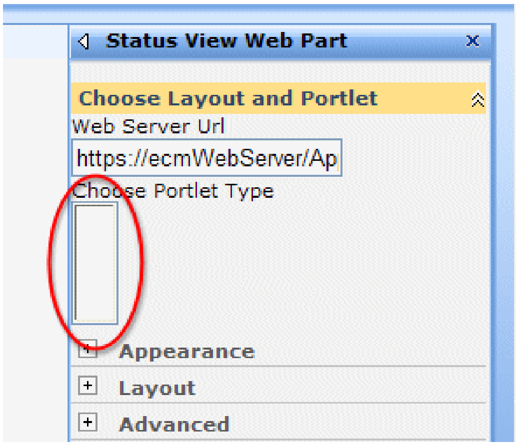
Note: For other Internet Explorer security requirements, see Requirements on page 44.

Message from webpage: System error: -2146697208

When a user attempts to configure a StatusView Web Part using a **Web Server Url** that begins with **https**, the following error message may be displayed:

- System error: -2146697208

As a result, no portlet types are listed in the **Choose Portlet Type** list.



To address this issue, ensure that the **Use TSL x.x** setting is selected in **Internet Options**.

1. In Internet Explorer, select **Tools | Internet Options**.
2. Click the **Advanced** tab.
3. Under **Security**, select **Use TSL x.x**.
4. Click **OK**.

Note: For other Internet Explorer security requirements, see Requirements on page 44.

Web Part Error: This portlet encountered an error

When attempting to load OnBase Web Parts, users may encounter the following error:

- This portlet encountered an error.

When attempting to load Workflow Web Parts, users may encounter the following error:

- You have insufficient rights to a workflow queue in the portlet configuration.

Also, the following error may be logged to the Diagnostics Console:

- Failed to get session for session id.

These errors indicate that users are not being authenticated properly. This issue is commonly caused by a mismatch between the Web Server URL provided in the OnBase DWP file and the **dmsVirtualRoot** value in the Web Server's Web.config.

The **ContentLink** URL provided in the OnBase DWP file is case sensitive—it must exactly match the value provided for the **dmsVirtualRoot** in the Web Server's Web.config.

If the information in the DWP file is incorrect, delete the DWP file from the SharePoint Web Part Gallery, make the appropriate changes to the file, and then re-upload the file to SharePoint. See Web Part Upload & Activation (SharePoint 2016) on page 16 or Web Part Upload & Activation (SharePoint 2019) on page 30 for more information.

Workflow Portlets Are Empty

When a user accesses a Workflow portlet, the portlet may display no contents, even when the configured queues do contain documents. This behavior occurs when the user lacks rights to the configured Workflow queues.

Ensure the user has sufficient rights to the Workflow queues in OnBase Configuration. For more information, see the Workflow module reference guide.

Contacting Support

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

- The OnBase module where the issue was encountered.
- The OnBase version and build.
- The type and version of the connected database, such as Microsoft SQL Server 2014 or Oracle 12c, and any Service Pack that has been installed.
- The operating system that the workstation is running on, such as Windows 10 or Windows Server 2012 R2, and any Service Pack that has been installed. Check the supported operating systems for this module to ensure that the operating system is supported.
- The name and version of any application related to the issue.
- The version of Internet Explorer and any Service Pack that has been installed, if applicable.
- A complete description of the problem, including actions leading up to the issue.
- Screenshots of any error messages.

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

OnBase® Foundation EP5

Web Parts for Microsoft SharePoint

Administration Guide

Foundation EP5

Configuration

StatusView Web Parts allow you to display portlets that are available through OnBase StatusView.

Before you begin, read the following requirements. For an overview of configuration procedures, see Overview on page 44.

Requirements

1. Ensure both the OnBase Web Server URL and the SharePoint server's URL are members of the same security zone in Internet Explorer.
2. Ensure you have sufficient SharePoint permissions to configure Web Parts. See your system administrator for information on rights assigned to you.
3. During configuration, if you cannot see a list of available portlets, first confirm that you have sufficient privileges, and then verify that the following security settings are set to **Enable** or **Prompt** for the Web Server's security zone:
   - **Access data sources across domains**
   - **Navigate sub-frames across different domains**

   To change settings for the security zone, select the zone from the **Security** tab and click **Custom Level**. These settings are in the **Miscellaneous** category.
4. If your solution uses an HTTPS binding, ensure that the **Use TLS x.x** setting is selected on the **Advanced** tab in **Internet Options**. This setting is in the **Security** category.

Note: If you still cannot see a list of portlets after checking these options, check the installation. The **ContentLink** URL in the **OnBaseStatusViewWebpart.dwp** file must exactly match the **dmsVirtualRoot** value in the Web Server's web.config file. The URL also is case sensitive. Ensure the cases match as well.

Overview

To configure Web Parts for Microsoft SharePoint, complete the following procedures:

- StatusView Configuration on page 45
- StatusView Portlet Page Configuration on page 49
- StatusView Portlet Contents Configuration on page 55

StatusView Configuration

Before portlets can be configured for use in SharePoint, portlets must be assigned to the appropriate user groups with the StatusView interface.

Note: Client workstations must be able to access both the OnBase Web Server and the SharePoint server in order for OnBase Web Parts to render correctly in SharePoint.

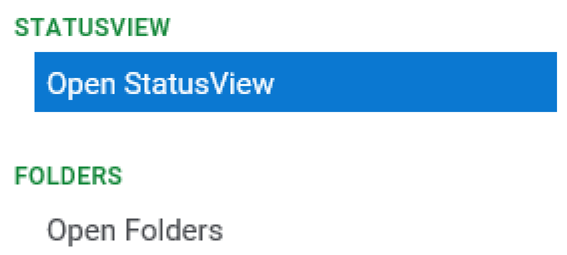
Continue to the following procedures:

- Accessing StatusView on page 45
- Assigning Portlet Privileges on page 45

Accessing StatusView

To access StatusView:

1. Log on to the OnBase Web Client.
2. Select **Open StatusView** from the **Main Menu** list in the OnBase Web Client.



3. The StatusView interface is displayed.

Assigning Portlet Privileges

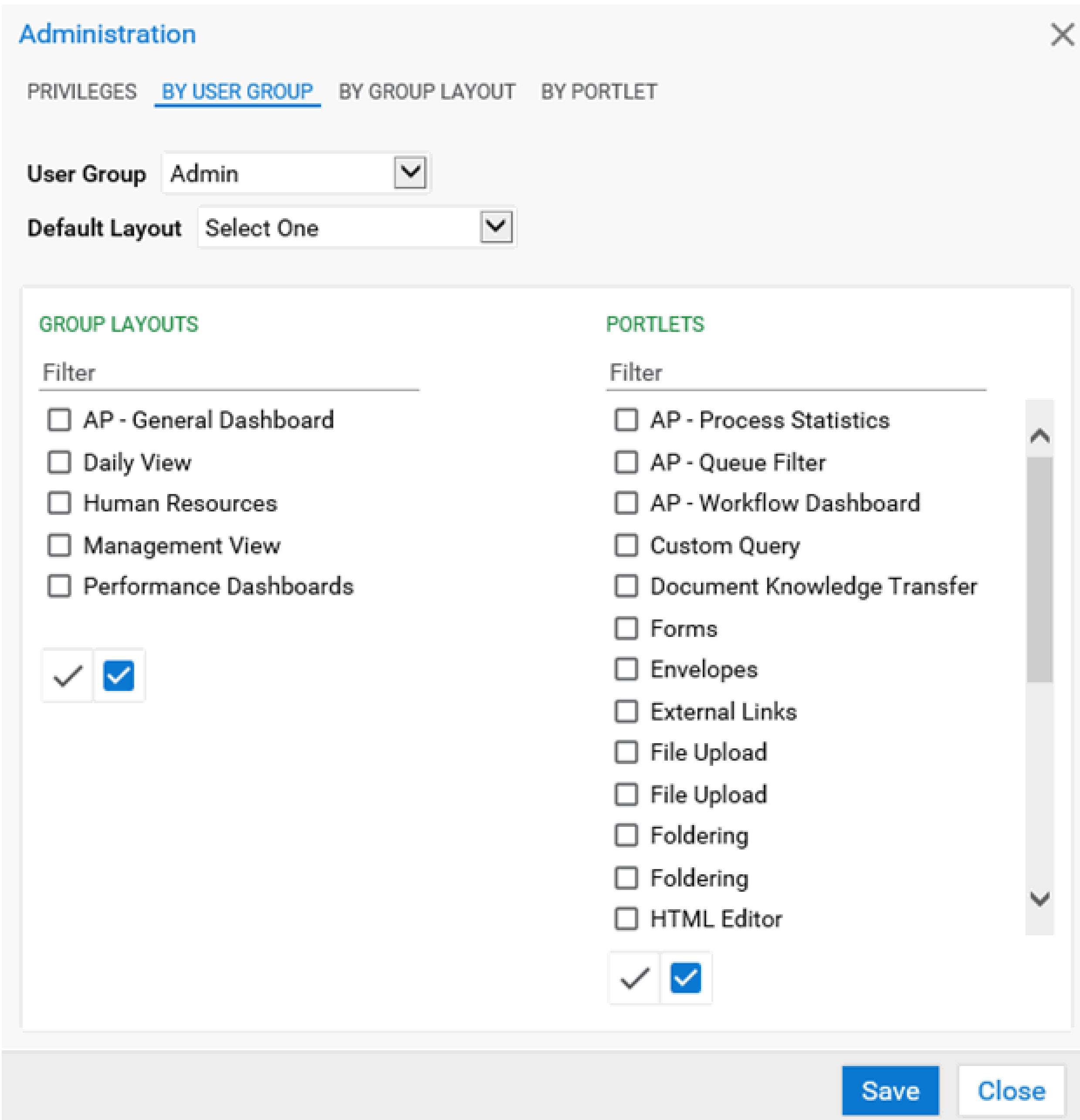
To be able to add portlets to a layout, a user group must be assigned privileges to the portlet types. Portlet privileges are not required for viewing portlets within a layout.

Note: On systems concurrently running multiple versions of OnBase, some OnBase versions may include portlets that are not available in earlier versions. A portlet is available only within the OnBase versions where the portlet is supported. Within the earlier versions, you can assign privileges to the portlet using the Administration pane, but the portlet will not be available for layout configuration, and the portlet will not be displayed in existing layouts where it has been added using a newer OnBase version.

By User Group

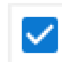
To assign portlet privileges by user group:

1. In Web Parts for Microsoft SharePoint, click **Administration**. The **Administration** dialog is displayed.



2. If necessary, click **By User Group** to assign privileges by user group.
3. Select a user group from the **User Group** drop-down.

4. You can select a layout to be the Default Layout for that user group in the **Default Layout** drop-down.
5. Select the appropriate portlet(s) from the **Portlets** list by selecting the check box next to each portlet.
6. To add all portlets, click the **Select All** button.

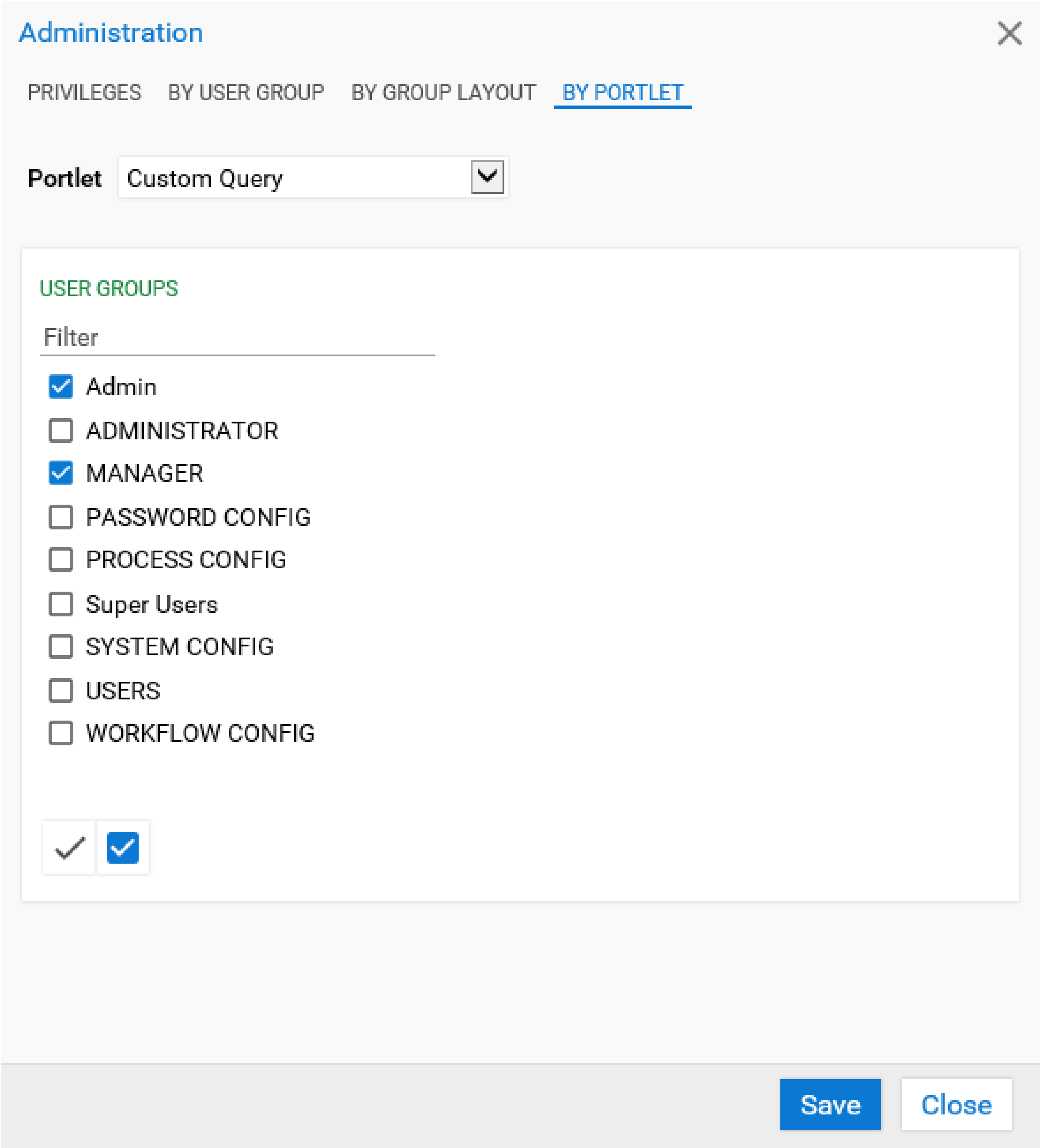


7. After all of the appropriate portlets are added, click the **Save** button.
8. To remove portlets, deselect the check box next to a portlet or remove all the portlets by clicking the **Clear Selected** button.

By Portlet

Follow these steps to assign portlet privileges by portlet type.

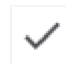
1. Select **Administration** from the mode drop-down list.
2. Click **By Portlet**.



3. Select a portlet type from the **Portlet** drop-down.
4. Select the user group(s) who should have privileges to the selected portlet type by selecting the check box next to each user group.

5. If you want to give privileges for the selected portlet to all user groups, click the **Select All** button.

6. If you to remove privileges for the selected portlet from all user groups, click the **Clear Selected** button.



7. When finished, click **Save**.

StatusView Portlet Page Configuration

The following procedures describe how to configure portlet pages for OnBase Web Parts. For more detailed information about creating pages in SharePoint, refer to the SharePoint documentation and help files.

- Configuring a Portal Page on page 49
- Reconfiguring Portlet Contents on page 53
- Changing the Portlet Type on page 54
- Adding Portlets to a Page on page 54
- Deleting an Existing Portlet on page 55

Configuring a Portal Page

Once a portlet has been assigned to user group(s) with StatusView, a site page must be created for Web Parts for Microsoft SharePoint. To configure portlets, you must have permissions to configure Web Parts. See your system administrator for information on rights assigned to you.

Note: OnBase portlet session time outs are controlled by the OnBase Web Server’s web.config file setting.

Note: During the site creation and configuration you may be prompted to enter your Windows credentials for login.

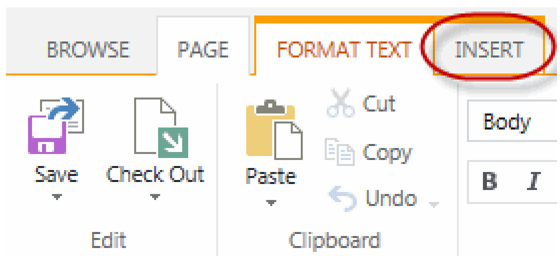
Refer to the appropriate procedure for your version of SharePoint:

- SharePoint 2016 or SharePoint 2019 on page 50
- SharePoint Online 2016 and SharePoint Online 2019 on page 51

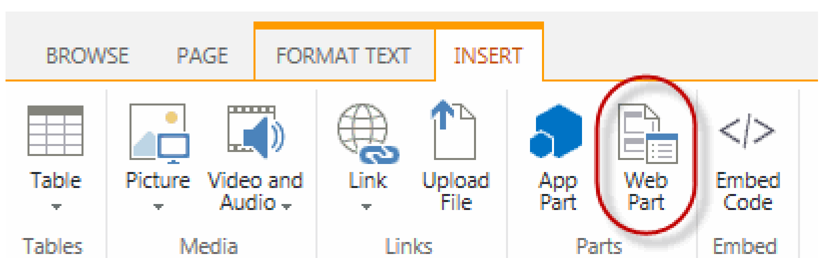
SharePoint 2016 or SharePoint 2019

The following steps describe how to configure a portal page in Microsoft SharePoint Foundation 2016 or 2019 and Microsoft SharePoint Server 2016 or 2019.

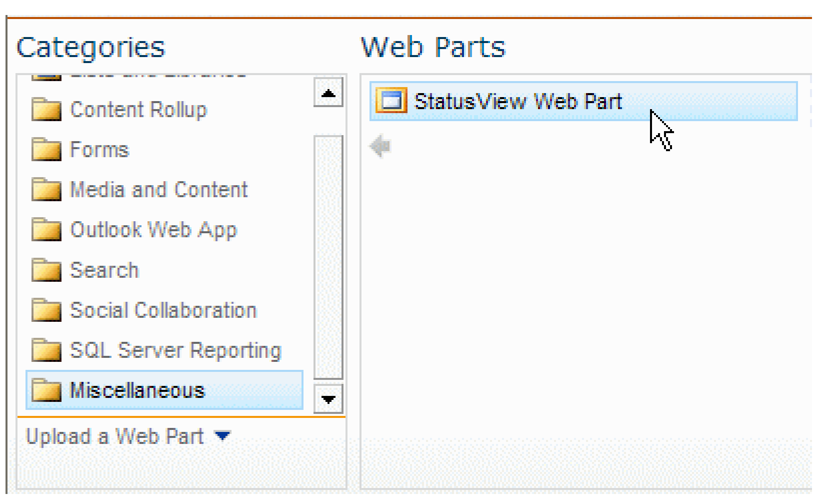
1. Access the SharePoint page where the Web Part should reside.
2. From the **Settings** gear icon menu, click **Edit Page**.
3. Place the cursor in the location where you want to add the Web Part.
4. Click the **Insert** tab.



5. From the ribbon, click **Web Part**.



6. Under **Categories**, select **Miscellaneous**.
7. Under **Web Parts**, select **StatusView Web Part**.



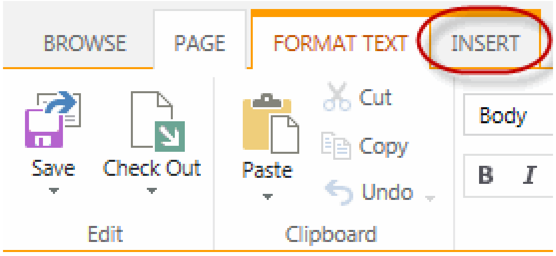
8. Click **Add**. The Web Part is added. Continue adding Web Parts to your page as needed.

9. To save the page, do the following:
   a. Click the **Format Text** tab from the top of the page.
   b. Click the **Save** button.
10. Skip to Configuring the Web Part on page 52.

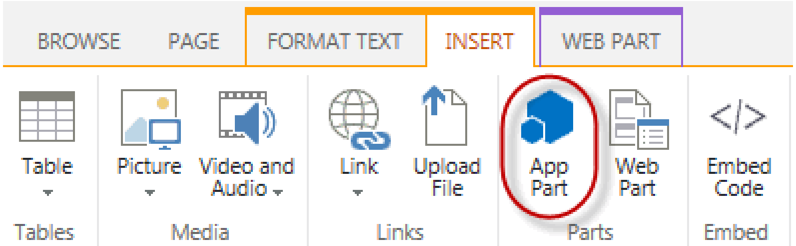
SharePoint Online 2016 and SharePoint Online 2019

The following steps describe how to configure a portal page in Microsoft SharePoint Online 2016 or SharePoint Online 2019.

1. Access the SharePoint page where the Web Part should reside.
2. From the **Settings** gear icon menu, click **Edit Page**.
3. Place the cursor in the location where you want to add the Web Part.
4. Click the **Insert** tab.



5. From the ribbon, click **App Part**.



6. Select the StatusView Web Part you would like to insert.
7. Click **Add**. The Web Part is added. Continue adding Web Part portlets to your page as needed.
8. To save the page, do the following:
   a. Click the **Format Text** tab from the top of the page.
   b. Click the **Save** button.
9. Continue to the next section, Configuring the Web Part.

Configuring the Web Part

Before you configure Web Parts, ensure your environment satisfies the Requirements on page 44.

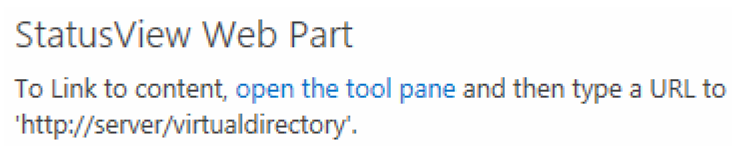
Once you've added a Web Part to a page, you can link the Web Part to content. Refer to the appropriate procedure for your version of SharePoint:

- SharePoint 2016 and SharePoint 2019 on page 52
- SharePoint Online 2016 and SharePoint Online 2019 on page 53

SharePoint 2016 and SharePoint 2019

The following steps describe how to configure a Web Part in Microsoft SharePoint Foundation 2016 or 2019 and Microsoft SharePoint Server 2016 or 2019. Complete these steps for each StatusView Web Part you've added to the page.

1. Click the **open the tool pane** link displayed in the newly added Web Part.



- The tool pane is displayed, and the **OnBase Server URL** and **Choose Portlet Type** fields are populated.
- If the fields are not populated, see Requirements on page 44.

2. Select the appropriate portlet type and formatting options for the portlet.

Note: For more information on the available portlet types, see StatusView Portlet Contents Configuration on page 55.

3. Click **OK**. The zone will now contain a configuration screen for the portlet type you selected.

Note: If a message displays in the portlet that a preview is not available, close the tool pane.

4. In the Web Part title bar, click the drop-down arrow.
5. Select **Reconfigure This Portlet**.
6. Configure the portlet to display the appropriate information. See StatusView Portlet Contents Configuration on page 55 for more information about configuring a portlet of a specific type.

SharePoint Online 2016 and SharePoint Online 2019

The following steps describe how to configure a Web Part in Microsoft SharePoint Online 2016 or Microsoft SharePoint Online 2019. Complete these steps for each StatusView Web Part you've added to the page.

1. In the Web Part title bar, click the drop-down arrow.
2. Select **Edit Web Part** to display the Web Part configuration pane on the right.
3. Expand the **Portlet Configuration** section of the pane.
4. Enter the address for your OnBase **Web Server URL**.

Note: The entered URL must exactly match the **dmsVirtualRoot** value in the Web Server's web.config file. The URL also is case sensitive. Ensure the cases match as well.

5. Click **Apply**.
6. Configure the portlet to display the appropriate information. See StatusView Portlet Contents Configuration on page 55 for more information about configuring a portlet of a specific type.

Reconfiguring Portlet Contents

If you change your mind about the type of information you want displayed in the portlet, you can reconfigure its contents. Reconfiguring the portlet changes the content the portlet displays, not the type of portlet.

Note: These steps apply to all supported versions of SharePoint except SharePoint Online 2016 and SharePoint Online 2019. See the following section for more information on reconfiguring a portlet in SharePoint Online 2016 or SharePoint Online 2019.

To reconfigure a portlet:

1. In the Web Part title bar, click the drop-down arrow.
2. Select **Reconfigure This Portlet**.
3. Configure the portlet as appropriate. See StatusView Portlet Contents Configuration on page 55.

SharePoint Online 2016 and SharePoint Online 2019

To reconfigure a portlet in SharePoint Online 2016 or SharePoint Online 2019:

1. In the Web Part title bar, click the drop-down arrow.
2. Select **Edit Web Part**.
3. Expand the **Portlet Configuration** section of the pane.
4. Select the **Reconfigure Portlet** option.
5. Click **OK**.
6. Configure the portlet as appropriate. See StatusView Portlet Contents Configuration on page 55.

Changing the Portlet Type

To change a portlet type, choose to modify the Web Part. Refer to the appropriate procedure for your version of SharePoint:

- SharePoint 2016 and SharePoint 2019 on page 54
- SharePoint Online 2016 and SharePoint Online 2019 on page 54

SharePoint 2016 and SharePoint 2019

The following steps describe how to change a portlet type in Microsoft SharePoint Foundation 2016 or Microsoft SharePoint Foundation 2019 and Microsoft SharePoint Server 2016 or Microsoft SharePoint Server 2019.

1. From the **Settings** gear icon menu, click **Edit Page**.
2. Click the drop-down arrow in the Web Parts title bar.
3. Select **Edit Web Part**.
4. Select the appropriate portlet type from the tool pane.
5. Click **OK**.

SharePoint Online 2016 and SharePoint Online 2019

You cannot change the portlet type in Microsoft SharePoint Online 2016 or Microsoft SharePoint Online 2019. You must remove the unwanted Web Part and replace it with the appropriate one.

For more information on removing the unwanted Web Part, see Deleting an Existing Portlet on page 55.

For more information on placing the new, appropriate Web Part, see Adding Portlets to a Page on page 54.

Adding Portlets to a Page

The following steps describe how to add a portlet to a page. These steps apply to all supported versions of SharePoint.

1. Access the page.
2. Select **Site Actions | Edit Page**.
3. Click the **Add a Web Part** button for the zone where you want the Web Part.
4. Scroll through the list of available Web Parts and select the StatusView Web Part.

Note: The name of the StatusView Web Part is determined by your system administrator.

5. Click **Add**.
6. From the added Web Part, click **open the tool pane**.
7. Configure as appropriate. For more information, see Configuring a Portal Page on page 49.

Deleting an Existing Portlet

To delete a portlet from a page, refer to the appropriate procedure for your version of SharePoint.

- SharePoint 2016/2019 and SharePoint Online 2016/2019 on page 55

SharePoint 2016/2019 and SharePoint Online 2016/2019

The following steps describe how to delete a portlet from a page in the following applications:

- Microsoft SharePoint Foundation 2016
- Microsoft SharePoint Foundation 2019
- Microsoft SharePoint Server 2016
- Microsoft SharePoint Server 2019
- Microsoft SharePoint Online 2016
- Microsoft SharePoint Online 2019

To delete a portlet from a page:

1. Access the page.
2. From the **Settings** gear icon menu, click **Edit Page**.
3. Click the drop-down within the Web Part title bar.
4. Select **Delete**.
5. Click **OK**.

StatusView Portlet Contents Configuration

The following procedures describe how to configure portlet contents. These steps apply any supported version of SharePoint.

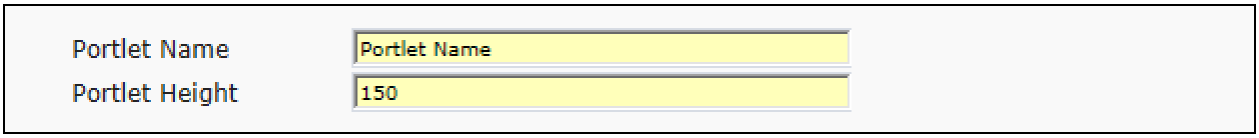
- Custom Query Portlet on page 56
- Document Knowledge Transfer Portlet on page 59
- Form Portlet on page 60
- Envelope Portlet on page 61
- File Upload Portlet on page 61
- Foldering Portlet on page 62
- Workflow Portlet on page 68
- Workflow Dashboard Portlet on page 69
- Workflow Process Statistics Portlet on page 73
- Workflow Queue Activity Portlet on page 76
- Workflow Queue Filter Portlet on page 78
- WorkView Filter Portlet on page 80
- WorkView Summary Portlet on page 81

To modify a portlet’s name or height, see the following topic.

Configuring a Portlet Name & Height

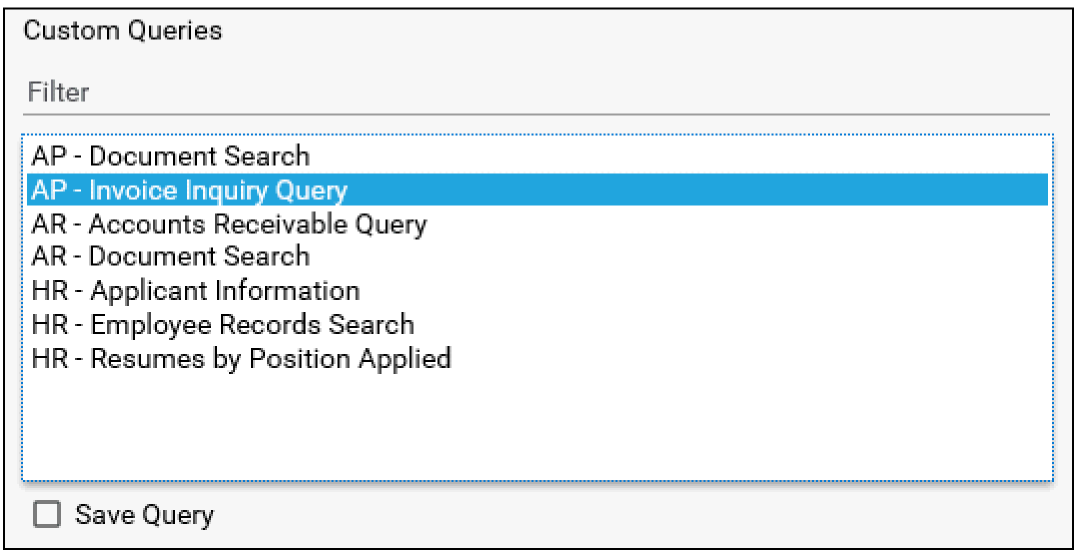
When you configure any portlet, you can change its name and height.

1. Type a descriptive name in the **Portlet Name** field.



2. Enter the **Portlet Height** in pixels.

Custom Query Portlet



1. Select a custom query.

Note: External text search custom queries are not supported in StatusView custom query portlets.

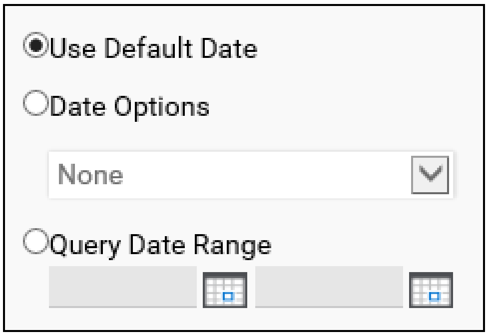
Note: Full-Text custom queries are only supported if your solution is licensed for Full-Text Search. See the **Full Text Search** module reference guide for more information.

Note: Folder Type custom queries are not available. To search for folders, use a folder portlet.

2. To allow users to enter their own retrieval values, skip to step 4.

   To create a predefined query, select the **Save Query** option. This option is available for standard custom queries only; it is not available for HTML custom queries.

   Fields for the query's configured retrieval keywords are displayed. If the query supports date ranges, the following options are displayed:



   a. Select one of the following options, if applicable.

Option	Description
Use Default Date	Select to use the custom query's default date, if one has been assigned to the query in OnBase Configuration.
Date Options	Select to use a dynamic date or date range, such as yesterday, last month, or year-to-date. Proceed to the next step for information about each option.
Query Date Range	Select to use a range of specific dates.

   b. If you selected **Date Options**, choose one of the options from the drop-down, as described in the following table. If the option has additional parameters (such as Specific Day), the parameters become available when the date option is selected.

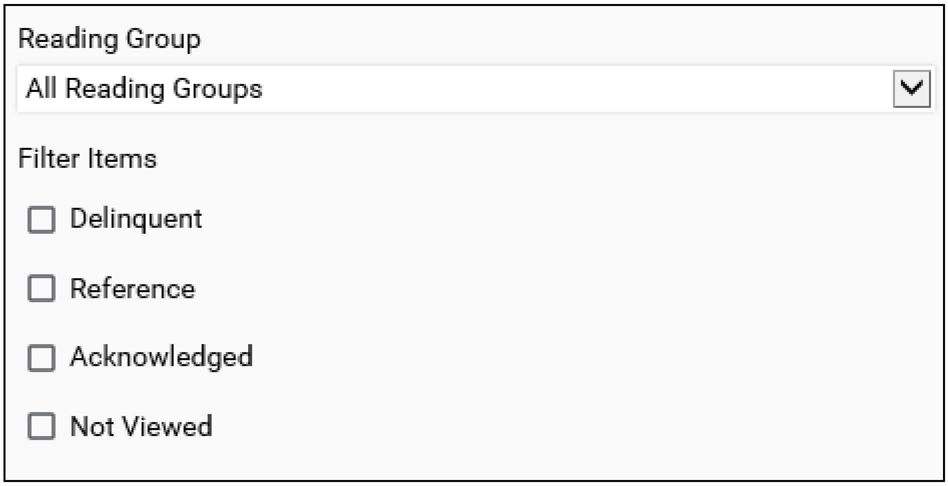
Date Options	Description
None	No default date is used.
Last Weekday	The previous business day is used as a default. Friday is considered the last day of the week.
Last Business Day	The previous business day is used as a default. Saturday is considered the last business day of the week.
Yesterday	Yesterday's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

Date Options	Description
Last of the Month	Last day of the previous month is used as the default date.
Specific Day	The specified day of the week is used as the default date.
Last Month	The date range of the prior 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 and the current date.
Year to Date	The date range extends from the first day of the year to the current date.
__ Previous Days	The date range is determined by the number of days specified. Valid values are 1-365.
__ Previous Weeks	The date range is determined by the number of weeks specified. Valid values are 1-52.
__ Previous Months	The date range is determined by the number of months specified. Valid values are 1-12.

3. Enter the appropriate values for the query.
4. Click **Save**.

Note: The Web Server's web.config file contains settings that limit the number of documents a custom query can return before an error message is displayed to the user. Of these settings (**sv_nDocQueryLimit** and **sv_nDocLowerQueryLimit**), only **sv_nDocQueryLimit** is respected. If the number of documents returned exceeds the number configured for **sv_nDocQueryLimit**, then the query will not be executed, and the user will be prompted to add parameters to further limit the search.

Document Knowledge Transfer Portlet



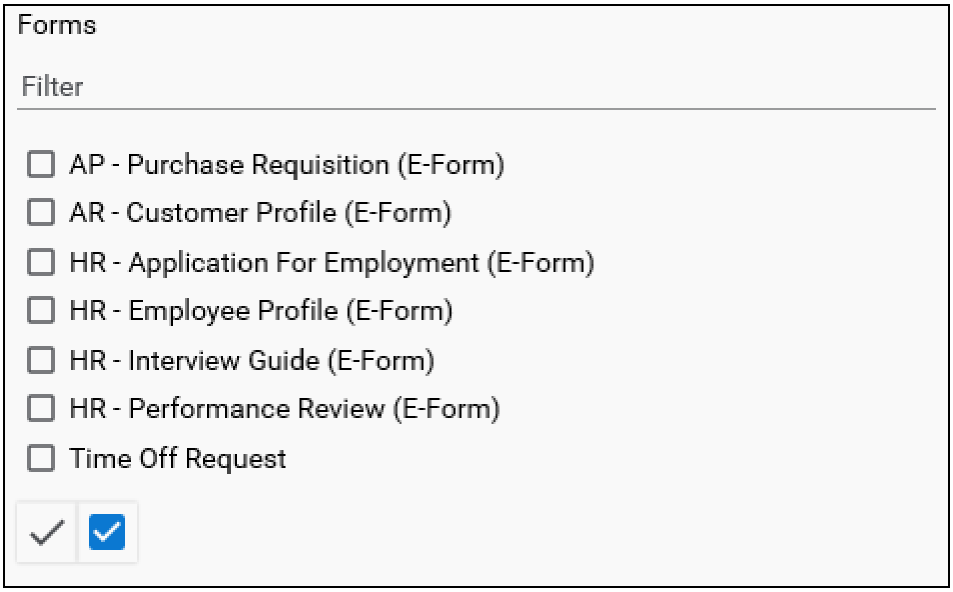
1. Select a **Reading Group**.
2. Select a filter specifying the status of reading group documents that should be displayed in the portlet:

Filter Item	Description
Overdue	Select to display only documents that are past their deadline dates and have not yet been acknowledged.
Reference	Select to display only documents that have been marked for reference.
Acknowledged	Select to display only acknowledged documents.
Not Viewed	Select to display only documents that have not yet been acknowledged.

Note: The **Not Viewed** and **Acknowledged** filters cannot be selected together. If you select **Acknowledged** and then select **Not Viewed**, the **Acknowledged** filter is removed.

3. Click **Save**.

Form Portlet



1. Select the E-Form or Unity Form you want to make available from this portlet by selecting the check box next to the title of the form.
2. If you want to add all of the available forms, click the **Select All** button.

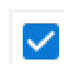
   If you want to remove all forms, click the **Clear Selected** button.

3. Click **Save**.

Envelope Portlet

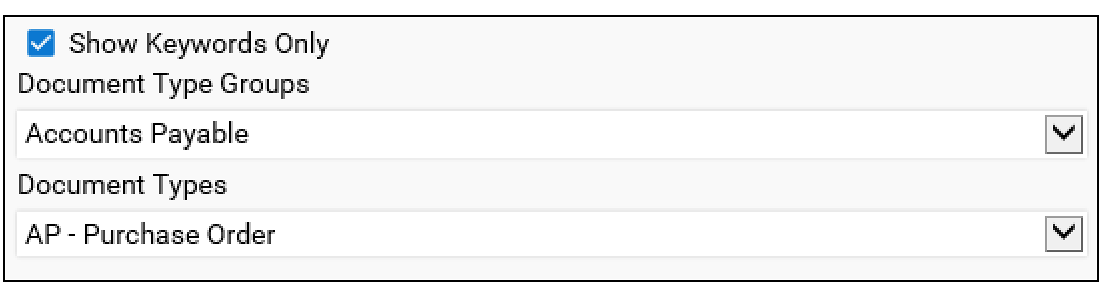
1. Select the appropriate envelopes.
2. If you want to select all of the envelopes, click the **Select All** button.



3. If you want to remove all of the selected envelopes, click the **Clear Selected** button.

4. Click **Save**.

File Upload Portlet



1. To select a default Document Type, select the **Show Keywords Only** option.
2. Select the appropriate Document Type Group from the **Document Type Groups** drop-down list.

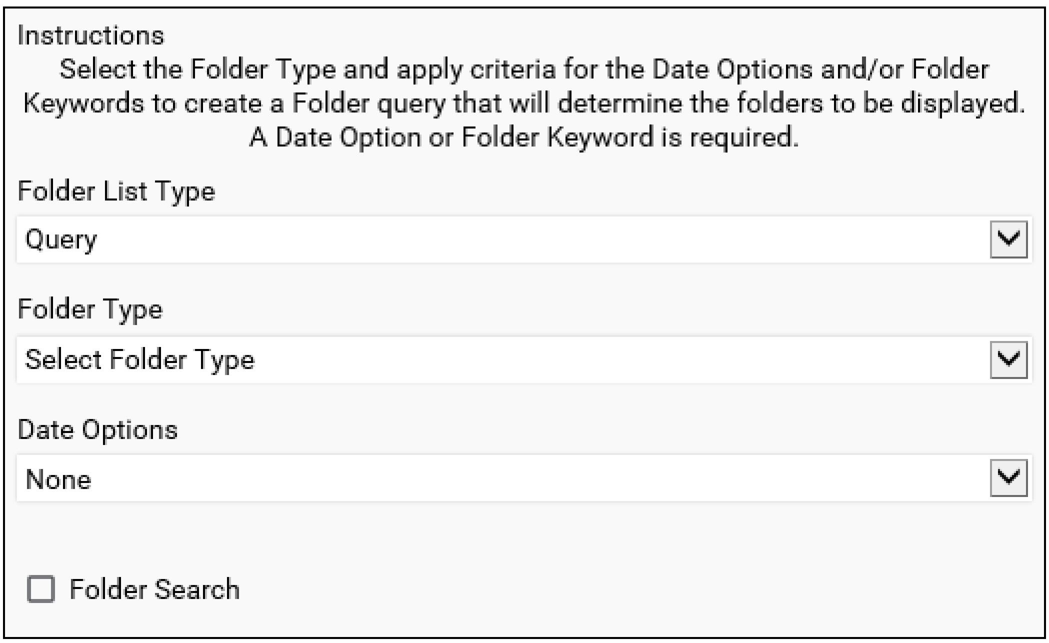
3. Select the appropriate Document Type from the **Document Types** drop-down list.

Note: When you select a default Document Type, users do not have the ability specify the Document Type Group, Document Type, File Type, or Document Date. The Document Date defaults to the date the document is uploaded.

4. Click **Save**.

Foldering Portlet

Foldering portlets can be configured to display specific folders or to query for folders to display. Both configurations offer a search option for users to search for the folders they need.

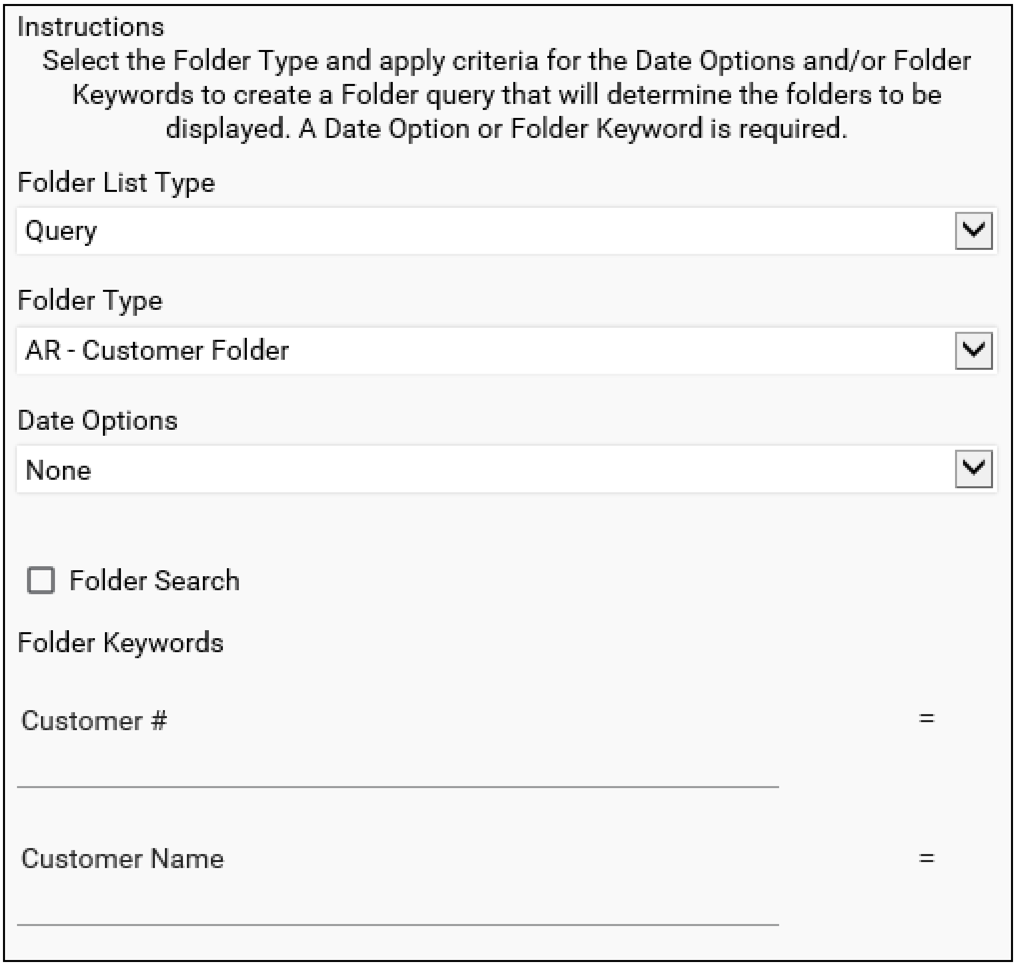


Do one of the following:

- To display folders that satisfy specific criteria, see Querying for Folders to Display on page 63.
- To display specific folders you have selected from the folder tree, see Selecting Folders to Display on page 65.
- To use the portlet only for folder searching, see Enabling Folder Search Only on page 66.

Querying for Folders to Display

A query displays all folders that satisfy specific criteria within a Folder Type. This option is helpful if folders should be added to the portlet automatically upon creation.

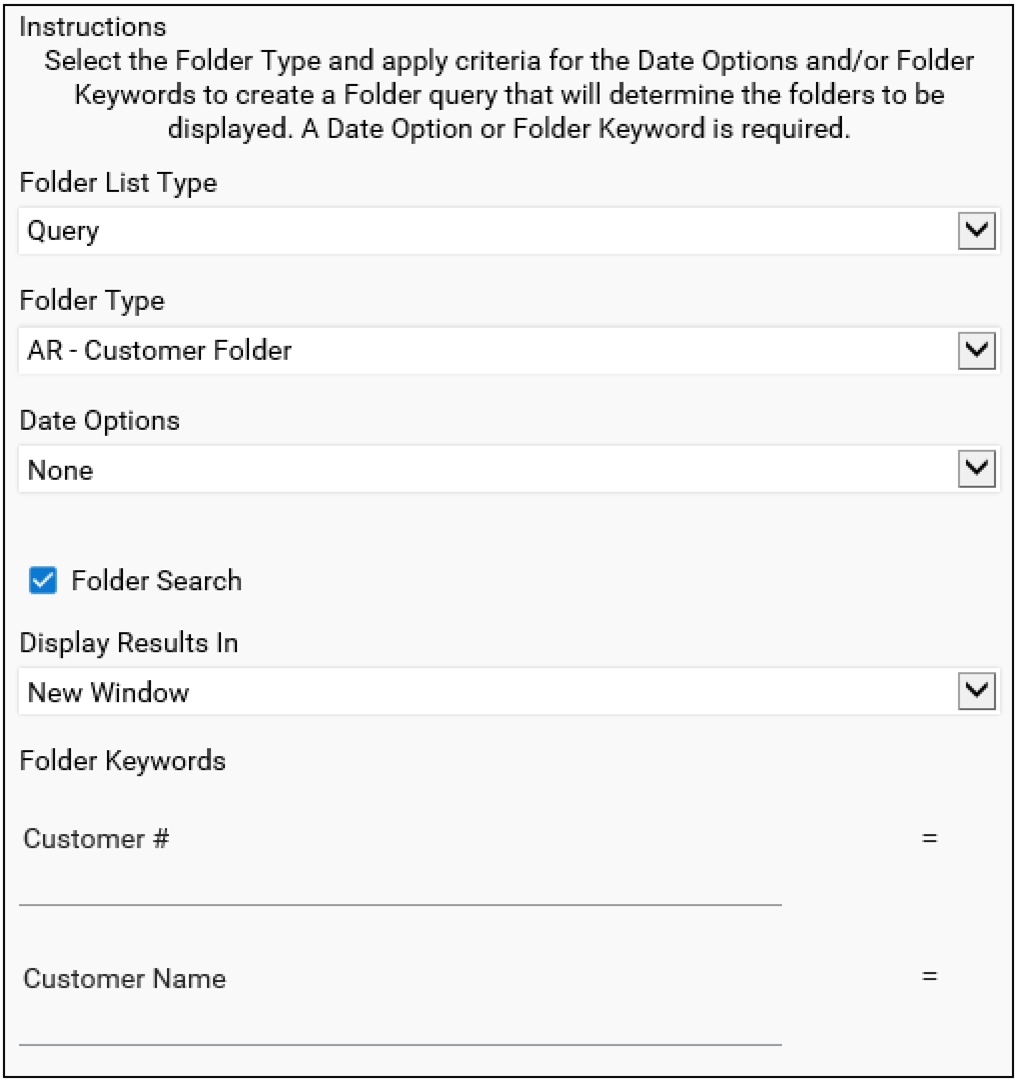


1. Under **Folder List Type**, select **Query**.
2. Select the **Folder Type** for the query.
3. Under **Date Options**, select or enter the date range of folders to be retrieved. Select **None** to use no date constraints.
4. Under **Folder Keywords**, enter any Keyword values for folders to be retrieved. Available fields vary depending on the selected Folder Type. If no Keyword Types are assigned to the Folder Type, then no Keyword fields are available.

Note: The configuration must contain at least one constraint. Either a date option other than **None** must be selected, or at least one Keyword value must be provided.

5. To allow users to also search for folders, select **Folder Search**.

6. From the **Display Results In** drop-down, select how the user's folder search results should be displayed. This option is available only if you selected **Folder Search**.
   - **New Window**—Folder search results are displayed in a new Folders window.
   - **Same Window**—Folder search results are displayed in a **Results** tab within the current portlet.

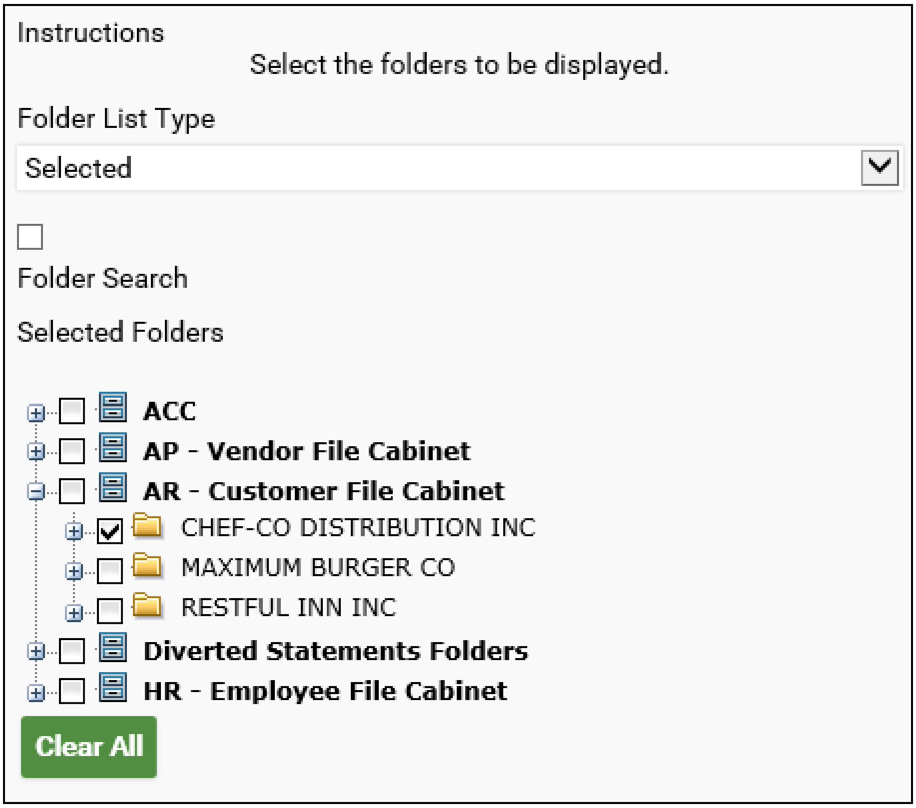


Note: The **Display Results In** setting does not apply to the folders returned by the configured folder query. When a user selects a folder query result, the folder is opened in the Folders window.

7. Click **Save**.

Selecting Folders to Display

Use this option to display one or more specific folders that are referred to often. If the portlet should display folders that belong to the same Folder Type and meet specific criteria, use the folder query option described in the previous topic.



1. Under the **Folder List Type** drop-down, select **Selected**.
2. Click a file cabinet to display its folders.
3. Select the check box next to each folder or file cabinet the portlet should display.
   - The portlet will display both the selected folder and any child folders within the selected folder. If you do not want to display all child folders, clear the check box next to the parent folder, and select only the child folders you want to display.

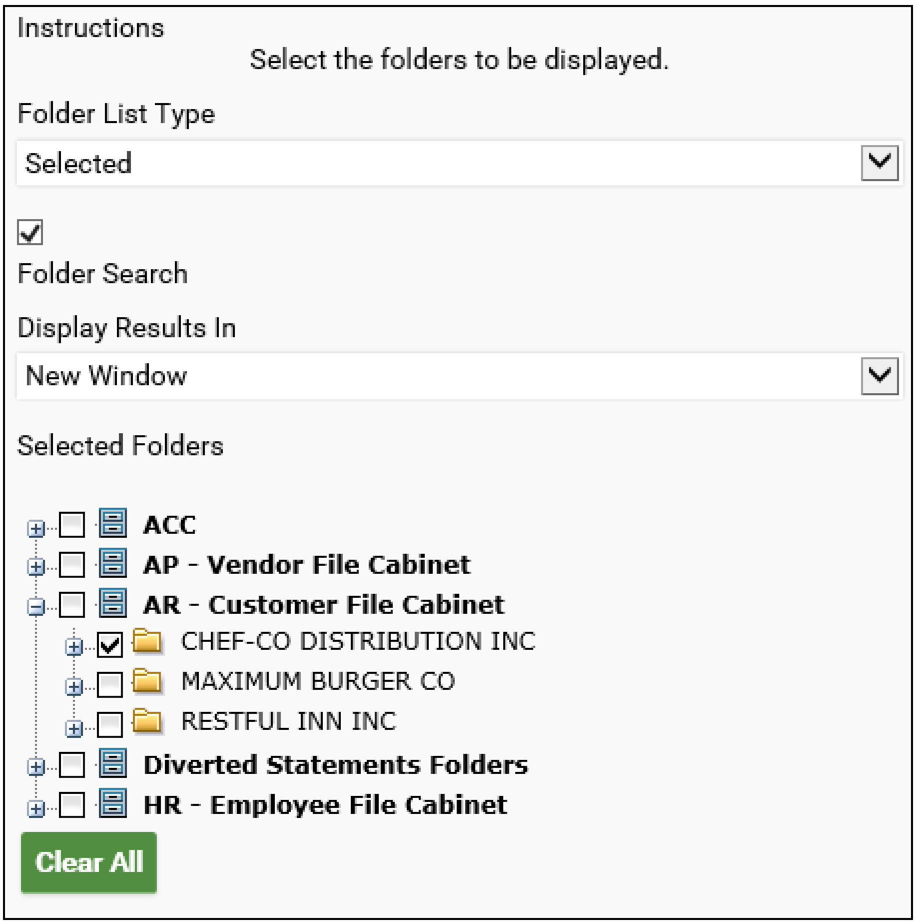
Note: If a folder is configured with the **Only Display Child Folders from Search** option, only the child folders will be displayed.

   - If you individually select all child folders within a parent folder, the parent folder will be automatically selected.

Tip: Click the **Clear All** button to clear all current selections.

4. To allow users to also search for folders, select **Folder Search**.

5. From the **Display Results In** drop-down, select how the user's folder search results should be displayed. This option is available only if you selected **Folder Search**.
   - **New Window**—Folder search results are displayed in a new Folders window.
   - **Same Window**—Folder search results are displayed in a **Results** tab within the current portlet.



Note: The **Display Results In** setting does not apply to the folders you selected from the folder tree. These folders and their contents are displayed within the portlet.

---

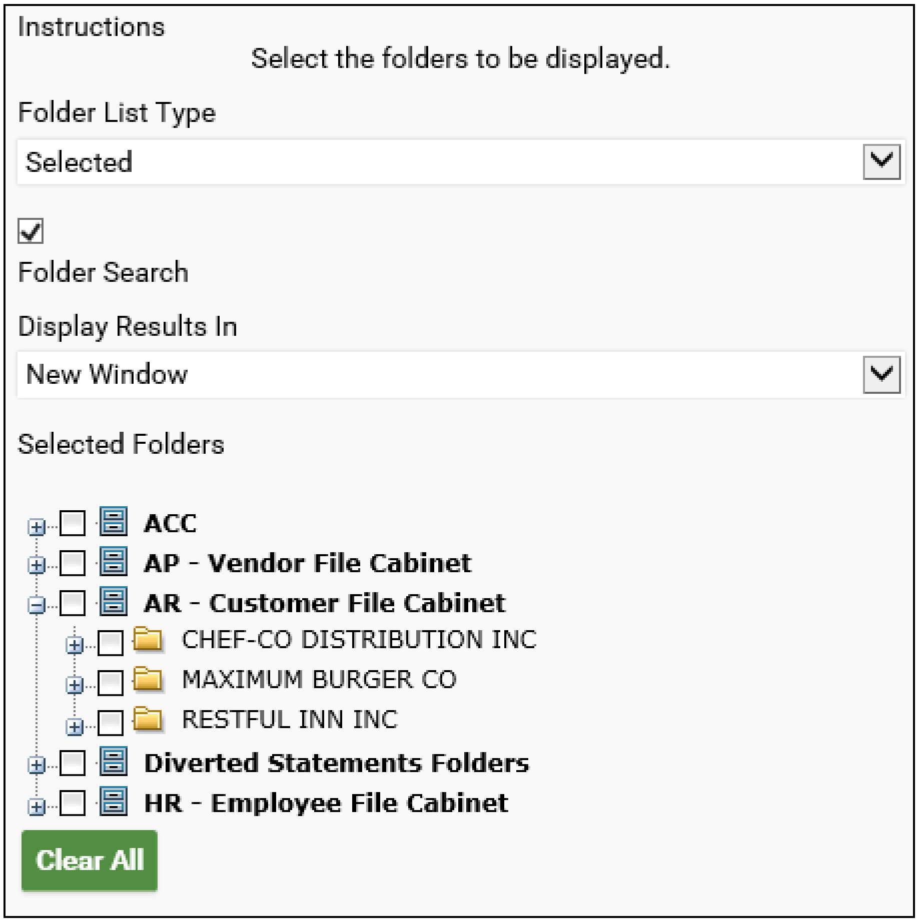
6. Click **Save**.

Enabling Folder Search Only

The folder portlet can be configured to display only the folder search feature. In this case, the portlet will display only results for folder searches conducted by the user.

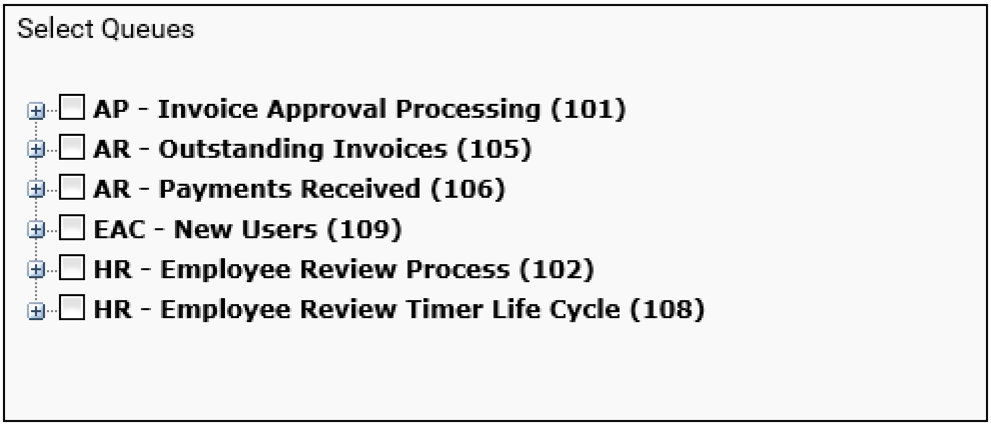
1. Under **Folder List Type**, select **Selected**.
2. Select **Folder Search** to allow users to search for folders.

3. Select how results should be displayed from the **Display Results In** drop-down.
   - **New Window**—Folder search results are displayed in a new Folders window.
   - **Same Window**—Folder search results are displayed in a **Results** tab within the current portlet.

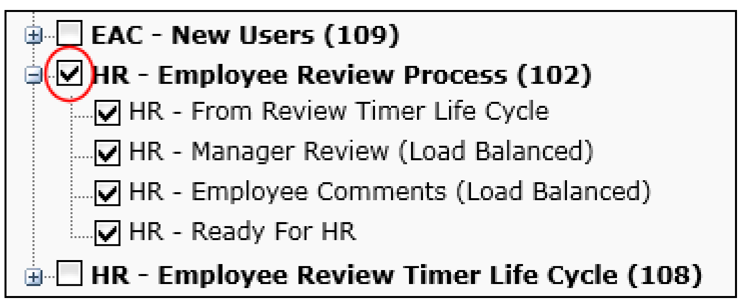


4. Click **Save**.

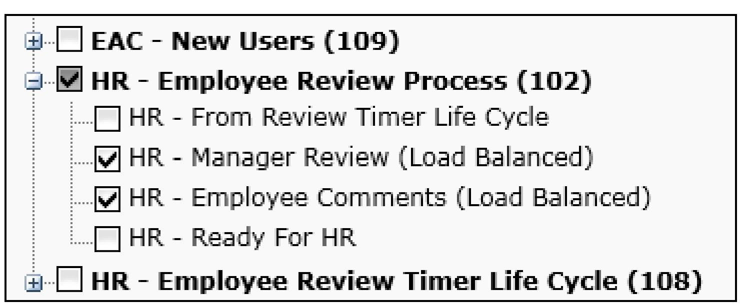
Workflow Portlet



1. Click a life cycle's name to display available queues.
2. To show all available queues in the life cycle, select the check box to the left of the life cycle's name.



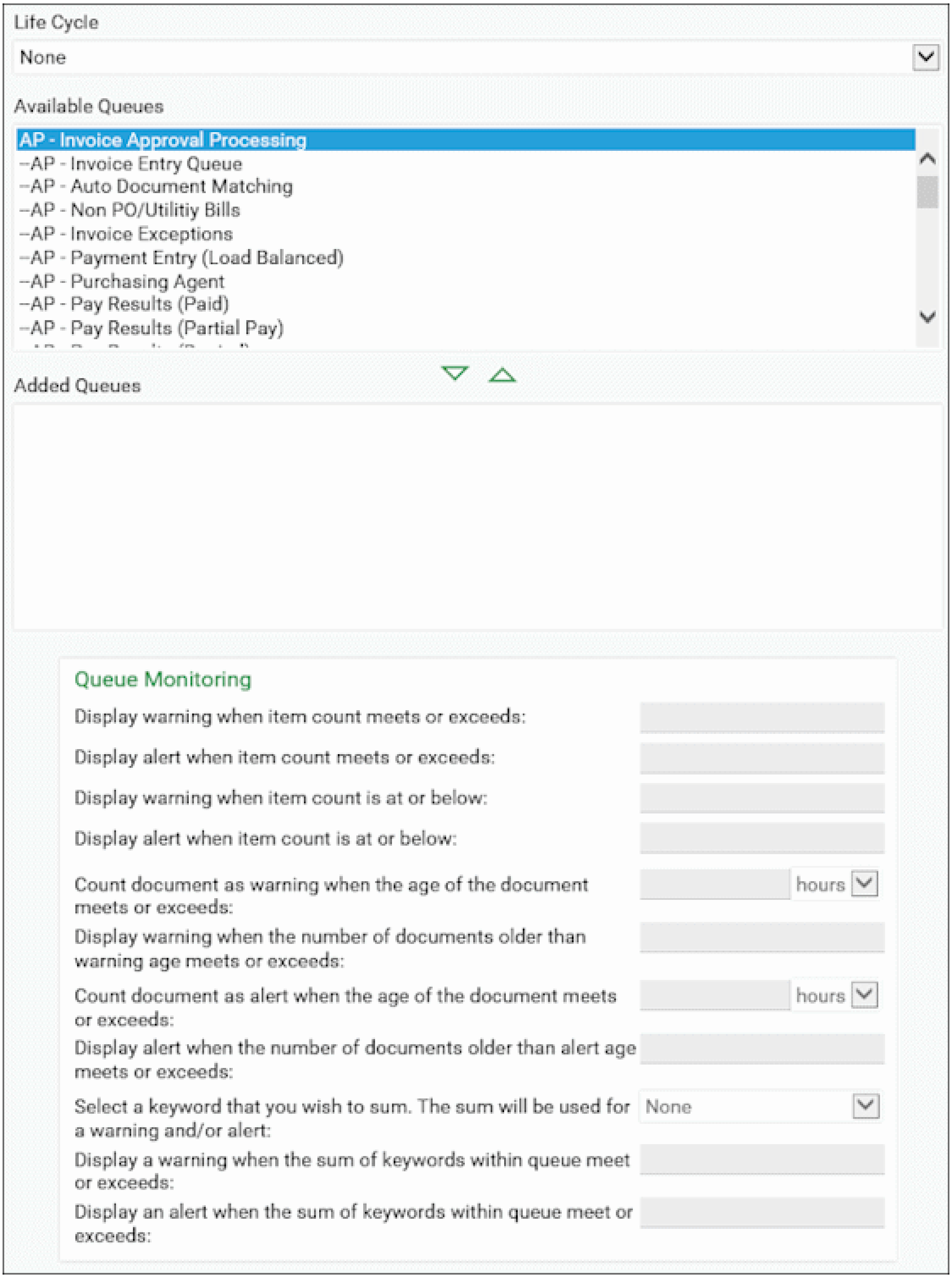
To show specific queues, select the check boxes to the left of the queues' names.



Note: Users can see only the contents of queues to which users have been granted rights in the Configuration module, regardless of the portlet configuration.

3. Click **Save**.

Workflow Dashboard Portlet



Note: This portlet requires a Business Activity Monitoring license. In addition, users must be granted appropriate rights to life cycles and queues.

1. Select the life cycle from the **Life Cycle** drop-down list. The life cycle is selected in the **Available Queues** list.
2. Select the queues you want summarized from **Available Queues**.
   - You can select a single queue or multiple. To select multiple queues, press **CTRL** as you click each queue's name.
   - To add all the queues in a life cycle, select the life cycle's name.
3. Click **Add**.

   If you want to remove a queue or life cycle, click Remove.

4. Select a queue from **Added Queues**.
   - By default, any warning and alert values configured for the queue in OnBase Configuration are displayed in the monitoring fields. These values determine when a warning or alert is displayed for a queue.
   - When a warning or alert is triggered, an icon is displayed next to the queue name in the color you specify for warnings or alerts.
5. In the fields provided, enter the appropriate warning or alert values. Available fields are described in the following table:

Field	Description
Display warning when item count meets or exceeds	If a queue's document count is greater than or equal to these values, a warning or alert is triggered. For example, suppose the warning value is 10 and the alert value is 25. If the queue's document count is 15, a warning is triggered.
Display alert when item count meets or exceeds	
Display warning when item count is at or below	If a queue's document count is less than or equal to these values, a warning or alert is triggered. For example, suppose the warning value is 10 and the alert value is 5. If the queue's document count is 5, an alert is triggered.
Display alert when item count is at or below	

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Count document as warning when the age of the document meets or exceeds</td><td rowspan="2">Enter the age threshold for documents that should trigger a warning or alert. If a document is the same age or older than the values specified, a warning or alert is triggered. These values can be provided in minutes, hours, days, or weeks.

Note: In the next set of fields, you can configure a tolerance to allow a certain number of documents to match or exceed the value configured here without triggering a warning or alert.</td></tr>
<tr><td>Count document as alert when the age of the document meets or exceeds</td></tr>
<tr><td>Display warning when the number of documents older than warning age meets or exceeds</td><td rowspan="2">Enter the maximum number of documents that can match or exceed the document age thresholds without triggering a warning or alert.

For example, if a queue always contains five documents older than the warning or alert age threshold, and you do not want those documents taken into account when the portlet displays a warning or alert, enter 5 here.</td></tr>
<tr><td>Display alert when the number of documents older than alert age meets or exceeds</td></tr>
<tr><td>Select a keyword type that you wish to sum. The sum will be used for a warning and/or alert</td><td>Select the Keyword Type whose combined values should be displayed in the portlet.

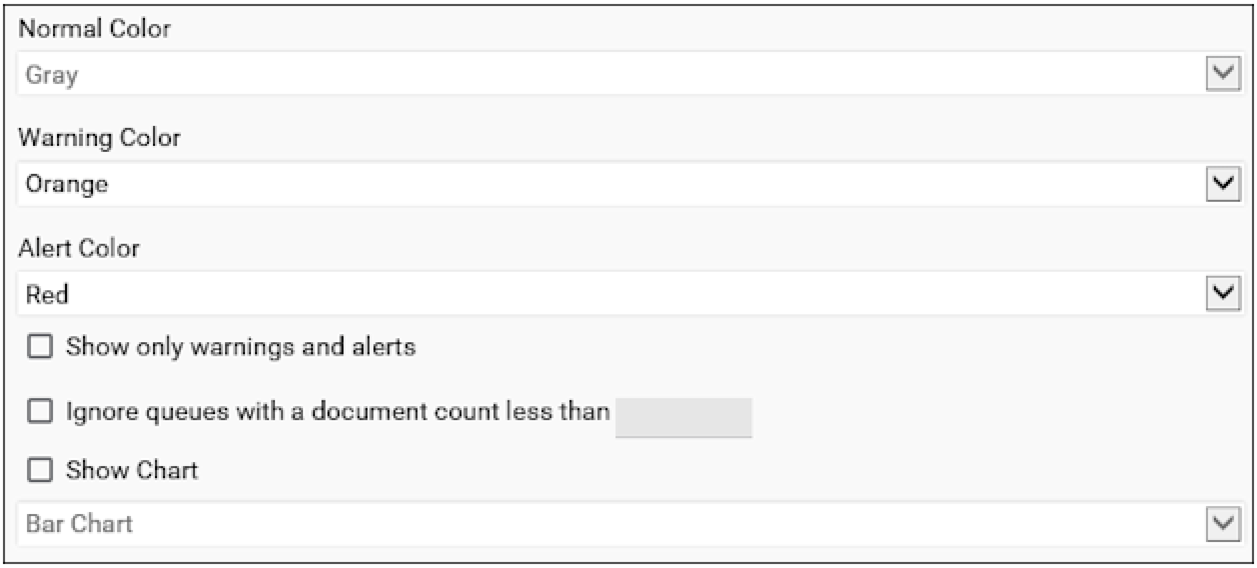
For example, if Amount is selected, the Amount values on all documents in the queue are added together. In the portlet, the Keyword Type and sum are displayed next to the queue’s name.

In the next set of fields, you can configure the sum to trigger a warning or alert when it matches or exceeds a specific value.</td></tr>
<tr><td>Display a warning when the sum of keywords within queue meet or exceeds</td><td rowspan="2">Enter the sum that should trigger a warning or alert. Each field is limited to 10 characters.

For example, suppose the warning value is 25000 and the alert value is 50000. If the combined value for the selected Keyword Type is 30000, a warning is triggered.

Note: Floating Point Keyword Types are not supported for Keyword sums. Negative values are also not supported.</td></tr>
<tr><td>Display an alert when the sum of keywords within queue meet or exceeds</td></tr>
</table>

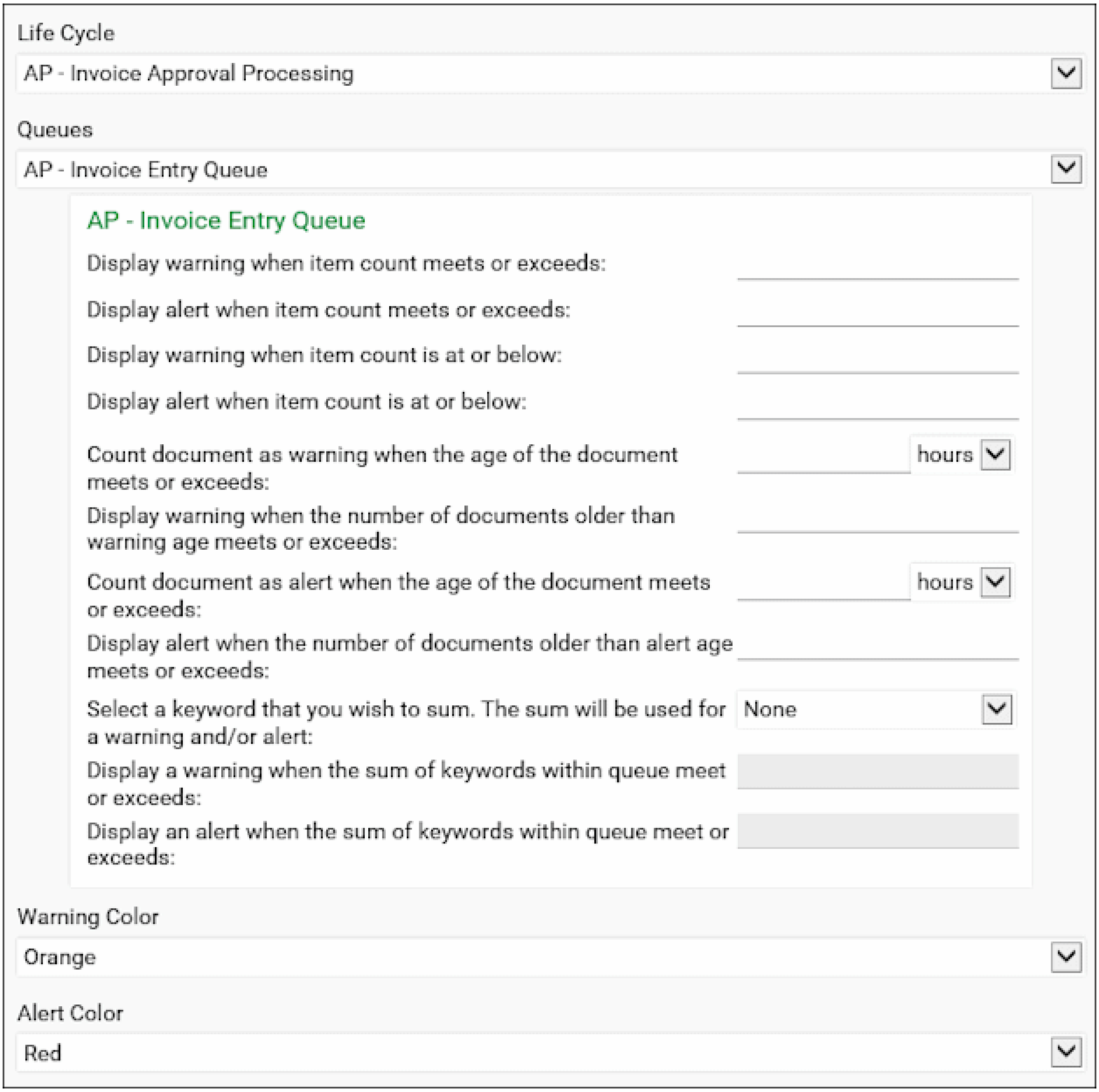
6. Configure the following display settings:



Option	Description
Normal Color	Select the color to use for queues that do not trigger a warning or alert.
Warning Color	Select the color to use for queues that trigger a warning.
Alert Color	Select the color to use for queues that trigger an alert.
Show only warnings and alerts	Select to display only queues that trigger a warning or alert.
Ignore queues with a document count less than	Select to hide queues with a document count less than the specified value. Enter the value in the field provided. **Note:** If this field is set to 0, then this setting is ignored. It will function the same as if the field were blank.
Show Chart	Select to display the queues as a chart. The following chart options are available: • **Bar Chart**: Displays queue counts as a horizontal bar graph. • **Column Chart**: Displays queue counts as a vertical bar graph.

7. Click **Save**.

Workflow Process Statistics Portlet



Before configuring the Workflow Process Statistics portlet, ensure that the graphic layout is configured for the life cycle you want to monitor. Graphic layouts are configured in OnBase Studio.

Note: This portlet requires a Business Activity Monitoring license.

Note: If a user has rights to a queue in a life cycle, the user can see all of the queues in the life cycle and the document counts for the queues. If a queue is configured with the **Hide Queue** setting in OnBase Configuration, the queue will not be displayed in the Process Statistics portlet.

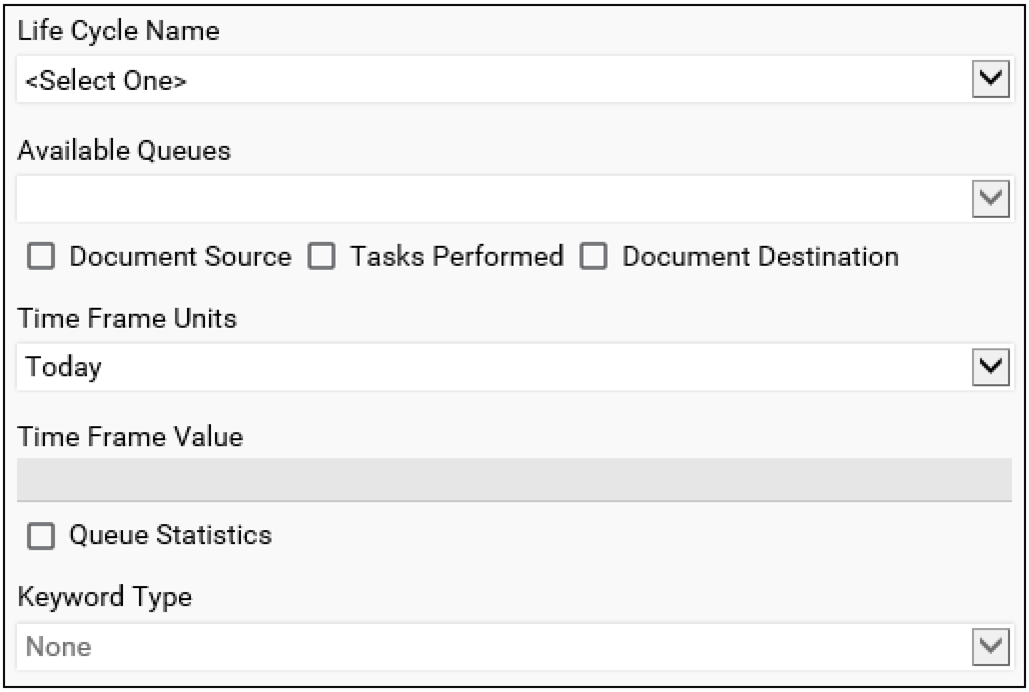
1. Select a life cycle from the **Life Cycle** drop-down list. The **Queues** list displays the queues in the selected life cycle.
2. Select a queue from the **Queues** drop-down list.
    - By default, any warning and alert values configured for the queue in OnBase Configuration are displayed in the monitoring fields. These values determine when a warning or alert is displayed for a queue.
    - When a warning or alert is triggered, an icon is displayed next to the queue name in the color you specify for warnings or alerts.
3. In the fields provided, enter the appropriate warning or alert values. Available fields are described in the following table:

Field	Description
Display warning when item count meets or exceeds	If a queue's document count is greater than or equal to these values, a warning or alert is triggered. For example, suppose the warning value is 10 and the alert value is 25. If the queue's document count is 15, a warning is triggered.
Display alert when item count meets or exceeds	
Display warning when item count is at or below	If a queue's document count is less than or equal to these values, a warning or alert is triggered. For example, suppose the warning value is 10 and the alert value is 5. If the queue's document count is 5, an alert is triggered.
Display alert when item count is at or below	
Count document as warning when the age of the document meets or exceeds	Enter the age threshold for documents that should trigger a warning or alert. If a document is the same age or older than the values specified, a warning or alert is triggered. These values can be provided in minutes, hours, days, or weeks. **Note:** In the next set of fields, you can configure a tolerance to allow a certain number of documents to match or exceed the value configured here without triggering a warning or alert.
Count document as alert when the age of the document meets or exceeds	

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Display warning when the number of documents older than warning age meets or exceeds</td><td rowspan="2">Enter the maximum number of documents that can match or exceed the document age thresholds without triggering a warning or alert.
For example, if a queue always contains five documents older than the warning or alert age threshold, and you do not want those documents taken into account when the portlet displays a warning or alert, enter 5 here.</td></tr>
<tr><td>Display alert when the number of documents older than alert age meets or exceeds</td></tr>
<tr><td>Select a keyword type that you wish to sum. The sum will be used for a warning and/or alert</td><td>Select the Keyword Type whose combined values should be displayed in the portlet.
For example, if Amount is selected, the Amount values on all documents in the queue are added together. In the portlet, the Keyword Type and sum are displayed next to the queue’s name.
In the next set of fields, you can configure the sum to trigger a warning or alert when it matches or exceeds a specific value.</td></tr>
<tr><td>Display a warning when the sum of keywords within queue meet or exceeds</td><td rowspan="2">Enter the sum that should trigger a warning or alert. Each field is limited to 10 characters.
For example, suppose the warning value is 25000 and the alert value is 50000. If the combined value for the selected Keyword Type is 30000, a warning is triggered.
Note: Floating Point Keyword Types are not supported for Keyword sums. Negative values are also not supported.</td></tr>
<tr><td>Display an alert when the sum of keywords within queue meet or exceeds</td></tr>
</table>

4. Select the **Warning Color** to use for queues that trigger a warning.
5. Select the **Alert Color** to use for queues that trigger an alert.
6. Repeat for each queue in the life cycle.
7. Click **Save** when finished.

Workflow Queue Activity Portlet



The Workflow Queue Activity portlet uses information stored in the Workflow log. If the Workflow log has been purged within the time frame you are monitoring, the information displayed may not be accurate.

In OnBase Configuration, ensure that logging is not disabled on the queue which contains the task that you want to monitor. Ensure **Log Execution** is enabled for each top level Task List that you wish to monitor.

Note: This portlet requires a Business Activity Monitoring license. In addition, users must be granted appropriate rights to life cycles and queues.

1. Select the life cycle from the **Life Cycle Name** drop-down list.
2. Select the queue you want to monitor from the **Available Queues** drop-down list.

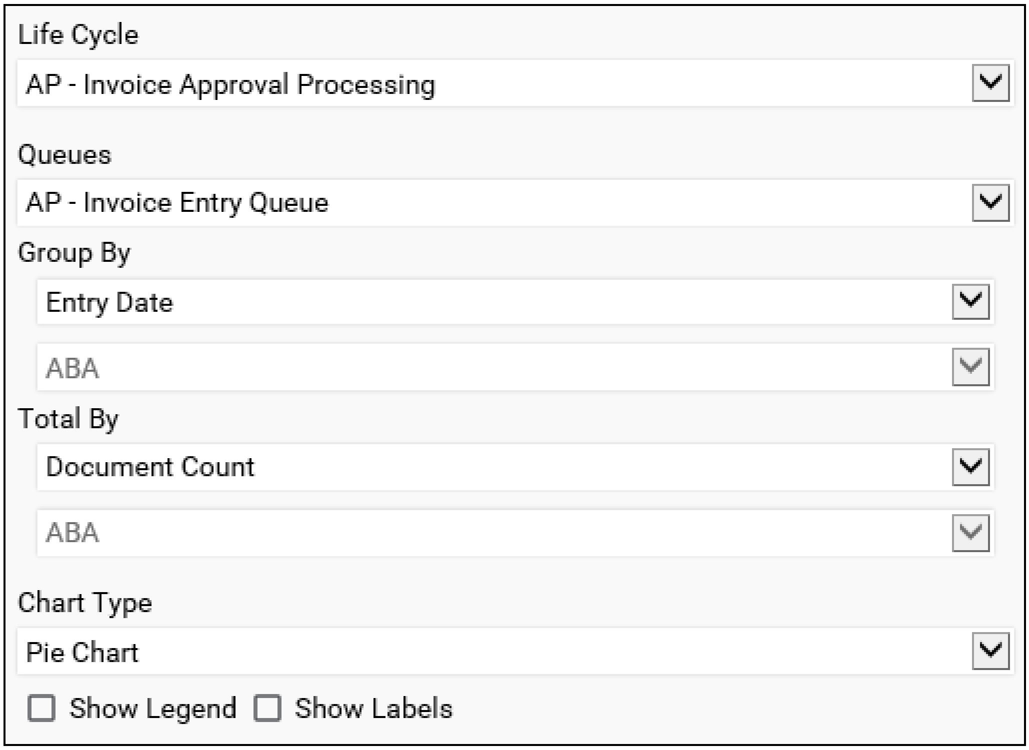
3. Select the information you want the portlet to display. You must select at least one option.
   - **Document Source** - Adds a pane displaying where the documents in the queue transitioned from. The pane displays transitional queues only. The source is not displayed for documents entering the selected queue through an import process or through document import.
   - **Tasks Performed** - Adds a pane displaying the tasks performed at the task list level, including system work, timer work, and ad-hoc user task lists. Actions and rule-level work are not included. A disabled task is counted if there is an attempt to execute it (e.g., through system or timer work). Because the Workflow Queue Activity portlet uses the Workflow log, **Log Execution** must be enabled for the tasks in the Configuration module.
   - **Document Destination** - Adds a pane displaying where the documents in the selected queue transitioned to. The pane displays transitional queues only. The destination is not displayed for documents transitioned out of the life cycle or deleted upon exiting the queue.
4. Select the time frame you want to monitor.
   - Select **Today** to display all activity that occurred on the current date.
   - Select **Time Frame** to configure the period you want to monitor. From the **Time Frame Units** drop-down, select **Minutes**, **Hours**, **Days**, or **Weeks**. In the **Time Frame Value** field, enter the number of minutes, hours, days or weeks you want to monitor.
5. Select **Queue Statistics** to include a pane displaying the queue's name, document count, and oldest entry date.
6. To display a Keyword Type's combined value for all documents in the queue, select the **Keyword Type** from the drop-down list. This field is available only if the **Queue Statistics** option is selected.

   For example, if **Amount** is selected, the Amount values on all documents in the queue are added together. The portlet will display the Keyword Type and combined value from all documents in the queue.

Note: Floating Point Keyword Types are not supported for Keyword sums.

7. Click **Save**.

Workflow Queue Filter Portlet



Note: This portlet requires a Business Activity Monitoring license. In addition, users must be granted appropriate rights to life cycles and queues.

1. Select the life cycle from the **Life Cycle** drop-down list.
2. Select the queue you want summarized from the **Queues** drop-down list.
3. Select how you want the information to be grouped in the **Group By** drop-down:
   - **Entry Date** groups documents by the date they entered the queue. Time of entry is not reflected; if all documents entered the queue on the same date but at different times, all documents are grouped together.
   - **Assigned To** groups documents according to the user they are assigned to. This option is useful for load-balanced queues.

- **Keyword Type** groups documents that have the same value for a selected Keyword Type. After selecting this option, select the Keyword Type to group by from the drop-down list.

Note: If there are multiple instances of a Keyword Type on the documents, there may be multiples instances of the same value in the results.

Note: You cannot group by Keyword Types that have a Floating Point data type.

4. Select the information to be totaled for each group in the **Total By** drop-down. Groups are determined by the option selected in the previous step.
   - **Document Count** totals the number of documents in each group.
   - **Keyword Sum** totals a Keyword Type's combined value for all documents in the queue. After selecting **Keyword Sum**, select the Keyword Type you want totaled from the drop-down list.

     For example, if **Amount** is selected, the Amount values on all documents in a group are added together. The portlet will display the Keyword Type and combined value from all documents in the queue.

Note: Alphanumeric, Currency, and Numeric data type Keyword Types are supported for the **Keyword Sum** option. If you use an Alphanumeric Keyword Type, the values must consist of all numbers. This option does not support Specific Currency, Date, Date/Time, or Floating Point data type Keyword Types. Keyword Types that have the Numeric 20 data type may not be displayed correctly if they are greater than 9999999999999999999.

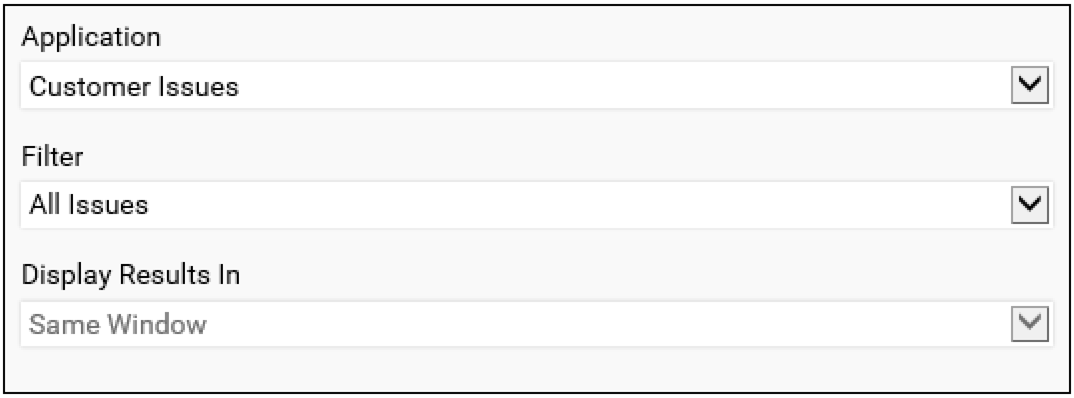
5. Select a **Chart Type**.
   - **Bar Chart** displays the information in a horizontal bar graph.
   - **Pie Chart** displays the information in a pie graph.
   - **Column Chart** displays the information in a vertical bar graph.

Note: Colors displayed in charts are assigned each time the portlet is refreshed in the client and cannot be permanently assigned.

6. To include a legend describing the chart, select **Show Legend**.
7. To display labels on the chart, select **Show Labels**.

   If neither **Show Legend** nor **Show Labels** is selected, users will be unable to read the chart.
8. Click **Save**.

WorkView Filter Portlet



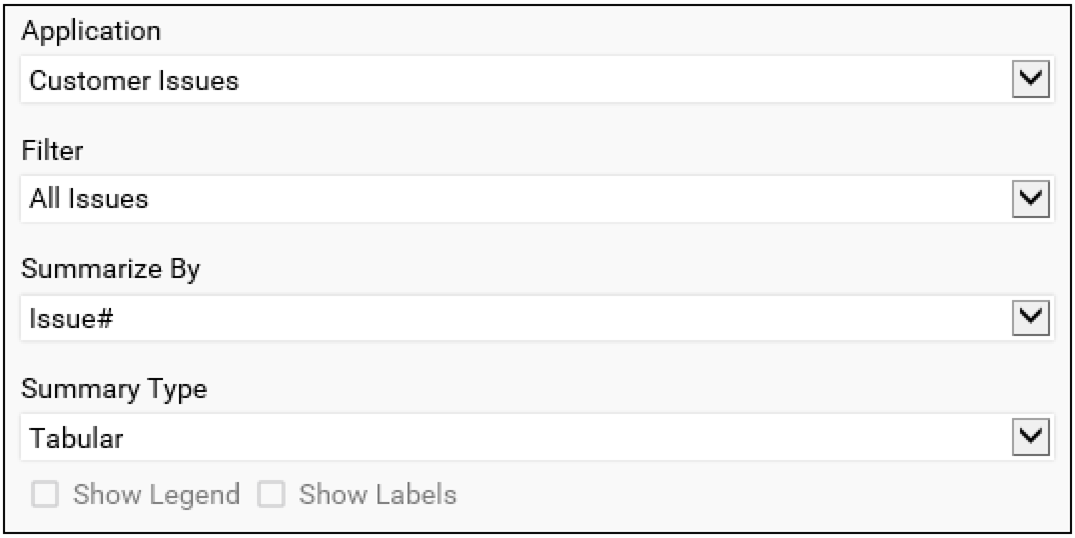
1. Select the appropriate **Application** from the drop-down list.
2. Select the appropriate **Filter** from the drop-down list.

Note: In order for a filter to appear in the drop-down list, it must be added to a Filter Bar that the user has permission to access.

3. If the **Display Results In** drop-down list is available, select whether filter results should be displayed in the **Same Window** or in a **New Window**. Otherwise, skip to the next step.

   This drop-down is available only if the selected filter contains User Entry Constraints.
4. Click **Save**.

WorkView Summary Portlet



1. Select the **Application** on which to base the summary.
2. Select the **Filter** from which to pull summary data.

Note: In order for a filter to appear in the drop-down list, it must be added to a Filter Bar that the user has permission to access.

3. Select the attribute that the summary will represent from the **Summarize By** drop-down list.
4. Select a **Summary Type** from the drop-down list.
   - The **Tabular** type displays data in a table format.
   - The **Pie Chart** option displays data in a pie graph. Additional options become available, allowing you to configure the chart.
   - The **Bar Chart** option displays the information in a bar graph. Additional options become available, allowing you to configure the chart.

   If you select **Tabular**, skip to step 7, otherwise continue to the next step.
5. To display a legend for the chart, select **Show Legend**.
6. To display labels on the chart, select **Show Labels**.
7. Click **Save**.

OnBase®

Foundation EP5

Web Parts for Microsoft SharePoint

User Guide

Foundation EP5

Usage

Once the portlets are configured, you can use the portlets to obtain information in OnBase.

Note: You may be unable to open documents if a license is unavailable. A license is required when opening a document, Workflow page, or WorkView object; when uploading a document or submitting an E-Form; and when viewing document Keyword values. If no licenses are available, you can still view portlets from the site, but you cannot open or upload documents.

Working with StatusView Portlets

Every Portlet Type has functionality specific to the feature or module it is accessing. The following StatusView Portlet Types are available:

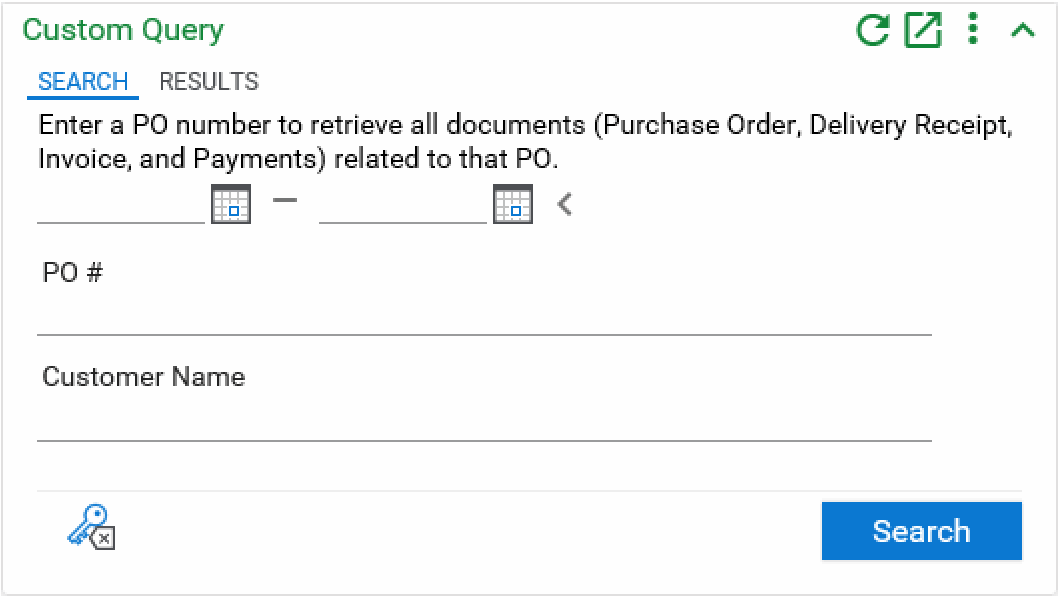
- Custom Query Portlets on page 84
- Document Knowledge Transfer Portlets on page 87
- E-Form Portlets on page 88
- Envelope Portlets on page 89
- File Upload Portlet on page 90
- Folder Portlets on page 92
- SharePoint Site Dashboard Portlets on page 96
- Workflow Portlets on page 97
- Workflow Dashboard Portlets on page 99
- Workflow Process Statistics Portlets on page 100
- Workflow Queue Activity Portlets on page 102
- Workflow Queue Filter Portlets on page 104
- WorkView Filter Portlets on page 104
- WorkView Summary Portlets on page 107

Custom Query Portlets

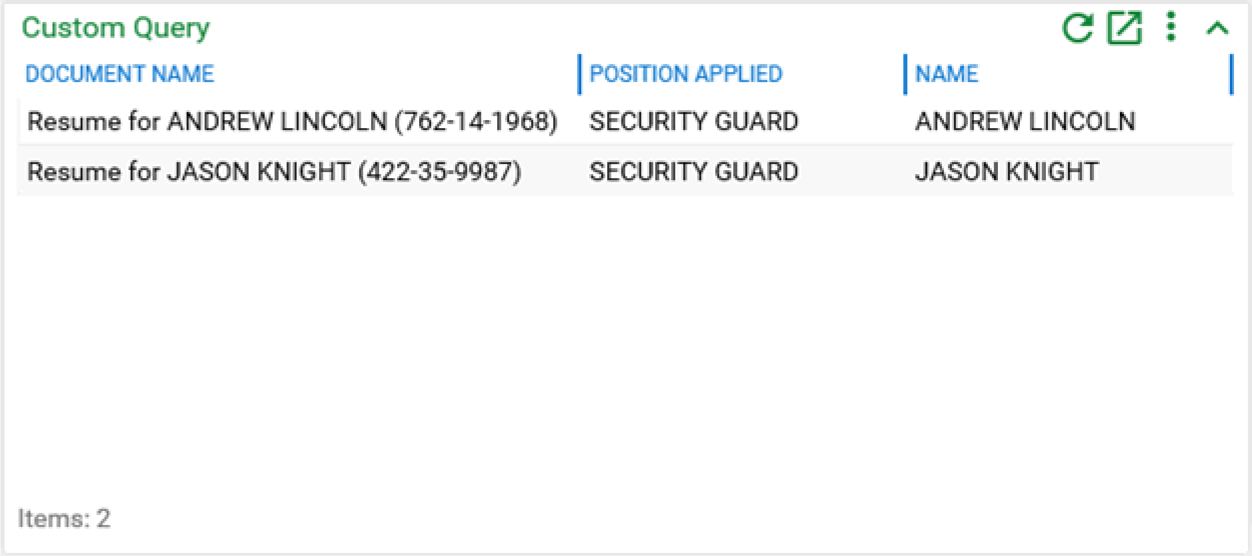
Custom query portlets display the selected custom query or pre-defined custom query results. The following examples show HTML and standard custom queries that require data entry:

HTML custom query:

Standard custom query:

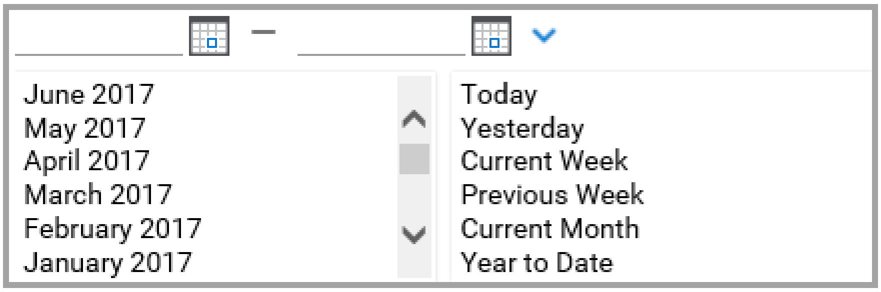


Some custom query portlets may automatically display a results list based on pre-configured parameters, as shown in the following example. Click a column header to sort results. Double-click a document to open it.



If the custom query allows you to enter your own parameters, perform the following steps:

1. Enter your parameters in the field provided.
2. If the custom query allows date-based searches, specify a date range by clicking the calendar buttons next to the **From Date** and **To Date** fields.
   - The availability of calendar buttons depends on the custom query's configuration. A default date range may already be provided.
   - Click the arrow button to the right of the calendar buttons for extended date options, as shown in the following example:



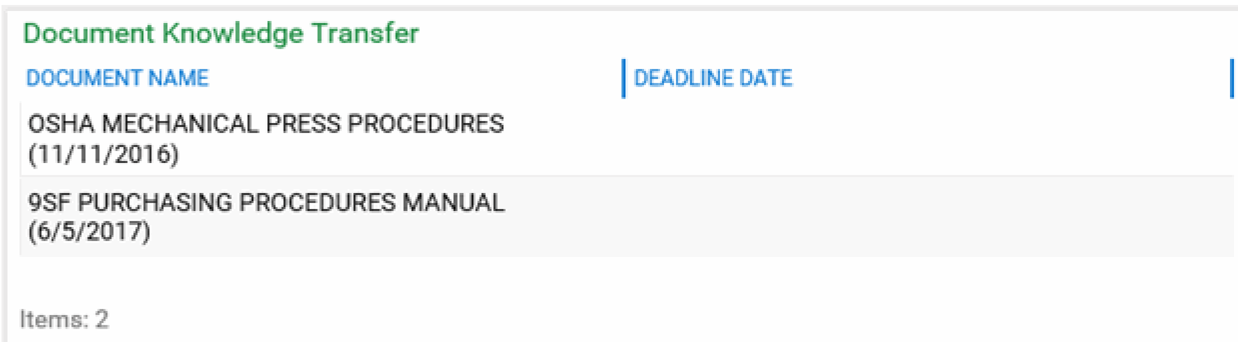
3. Click the **Search** or **Submit** button. The button's name may vary depending on the custom query's configuration.
   - Documents matching your search parameters are displayed. Depending on the type of custom query used, the results may be displayed in a separate window.
   - If no documents match the query's parameters, then the message **No documents found** is displayed.

   To sort results, click a column header.
4. Double-click a document to open it. If the results list is displayed within the portlet, click the **Search** tab to perform a new search.

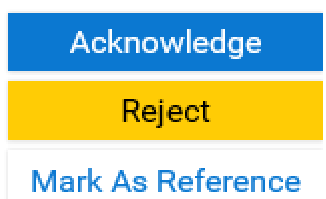
Document Knowledge Transfer Portlets

Document Knowledge Transfer (DKT) portlets display documents in your assigned reading groups. The portlet displays the name of the document and, if applicable, the deadline date it should be read by.

Depending on the portlet's settings, it may display only documents that you have or have not viewed. It also may display only documents that are overdue or marked as reference. Double-click a document to open it.

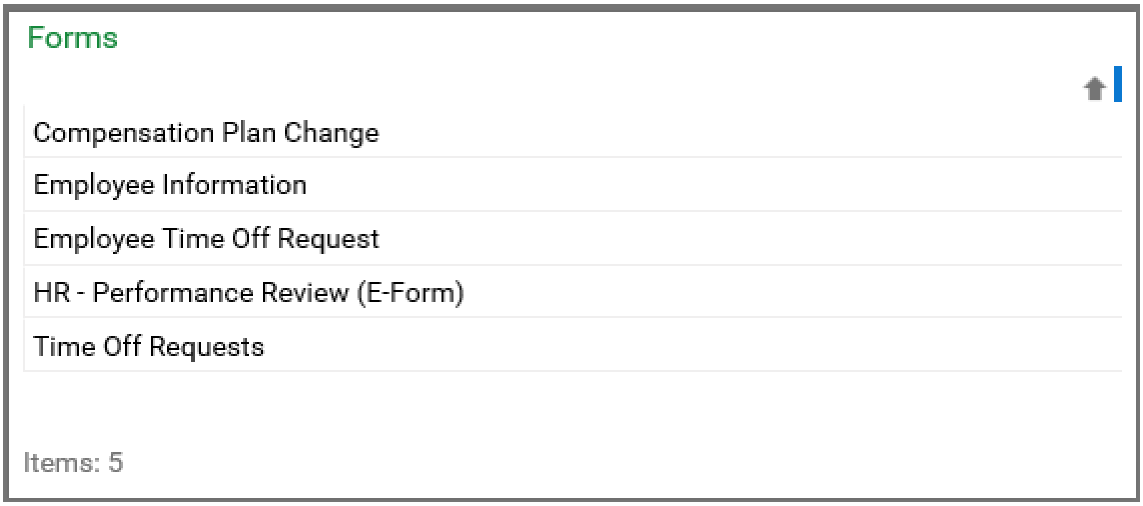


In the pane to the right of an open document, click a button to reject, acknowledge, or mark the document as a reference. For more information about using these options, see the Document Knowledge Transfer help files.



E-Form Portlets

Form portlets display HTML E-Forms, Unity Forms, and Image Forms that can be created from the portlet. Double-click the form you want to create.

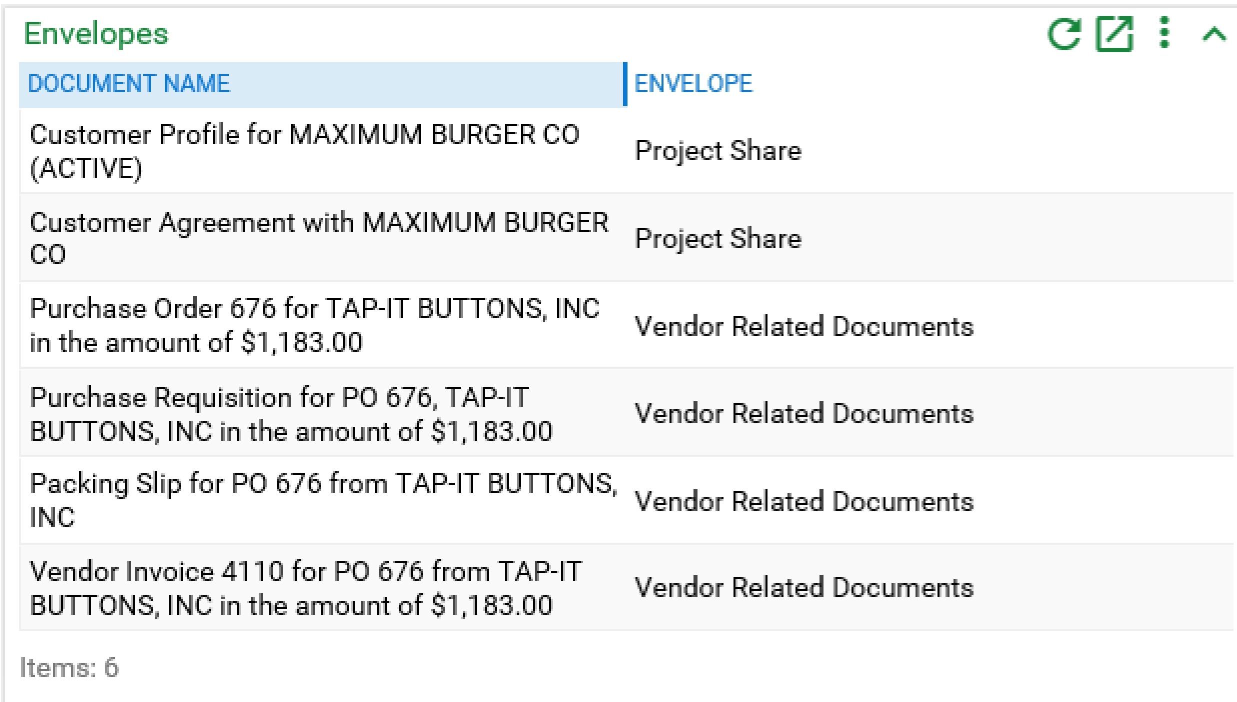


You can change the way the forms are sorted by clicking on the **Sorted ascending/descending** button.

Click **Sorted ascending** to sort the forms in ascending order. Click **Sorted descending** to sort the forms in descending order.

Envelope Portlets

Envelope portlets display documents that reside in the specified envelope(s). If the portlet is configured for multiple envelopes, then it also displays the envelope in which each document resides. Double-click a document to open it.

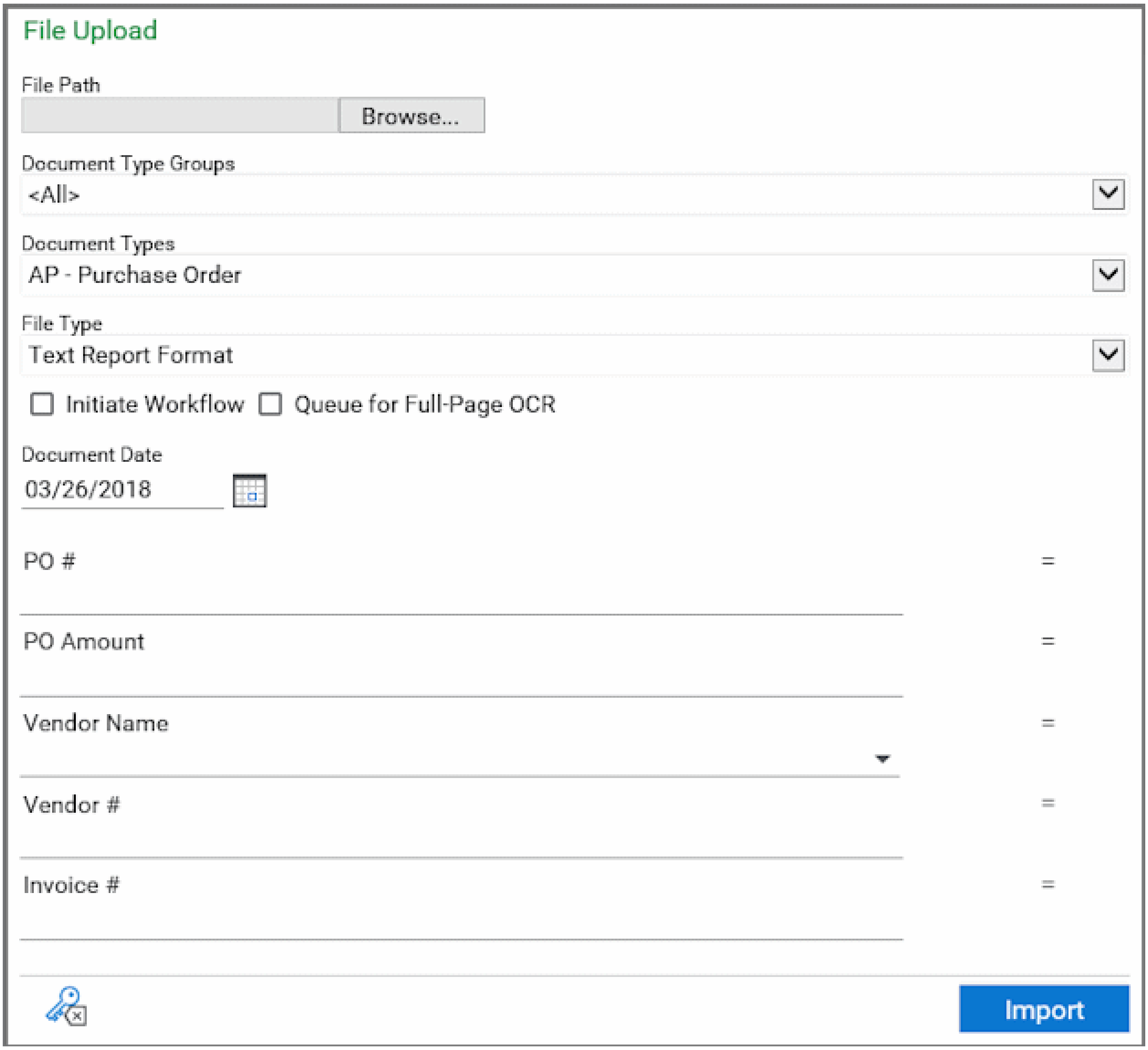

Envelopes

DOCUMENT NAME	ENVELOPE
Customer Profile for MAXIMUM BURGER CO (ACTIVE)	Project Share
Customer Agreement with MAXIMUM BURGER CO	Project Share
Purchase Order 676 for TAP-IT BUTTONS, INC in the amount of $1,183.00	Vendor Related Documents
Purchase Requisition for PO 676, TAP-IT BUTTONS, INC in the amount of $1,183.00	Vendor Related Documents
Packing Slip for PO 676 from TAP-IT BUTTONS, INC	Vendor Related Documents
Vendor Invoice 4110 for PO 676 from TAP-IT BUTTONS, INC in the amount of $1,183.00	Vendor Related Documents

Items: 6

File Upload Portlet

The File Upload portlet allows you to import documents into OnBase.



To upload a file:

1. Click **Browse** to select the file you want to upload.
2. Select a Document Type Group, Document Type, and File Type.

3. Select the Document Date.

Note: Depending on your system configuration, the **Document Type Groups**, **Document Types**, and **File Type** drop-down lists, as well as the **Document Date** field, the **Initiate Workflow** option, or the **Queue for Full-Page OCR** option, may not be displayed. See your system administrator for more information.

Tip: To retain the selected date for future uploads, click the lock button to the right of the calendar. The selected date is retained until you click the lock button again to unlock it.

4. Enter Keyword Values for the document. Available Keyword Type fields vary per Document Type.
5. Click the **Import** button to import the document into OnBase.

   If necessary, click the **Clear Keywords** button to clear all Keyword Values, or click the **Clear All** button to start over.

Folder Portlets

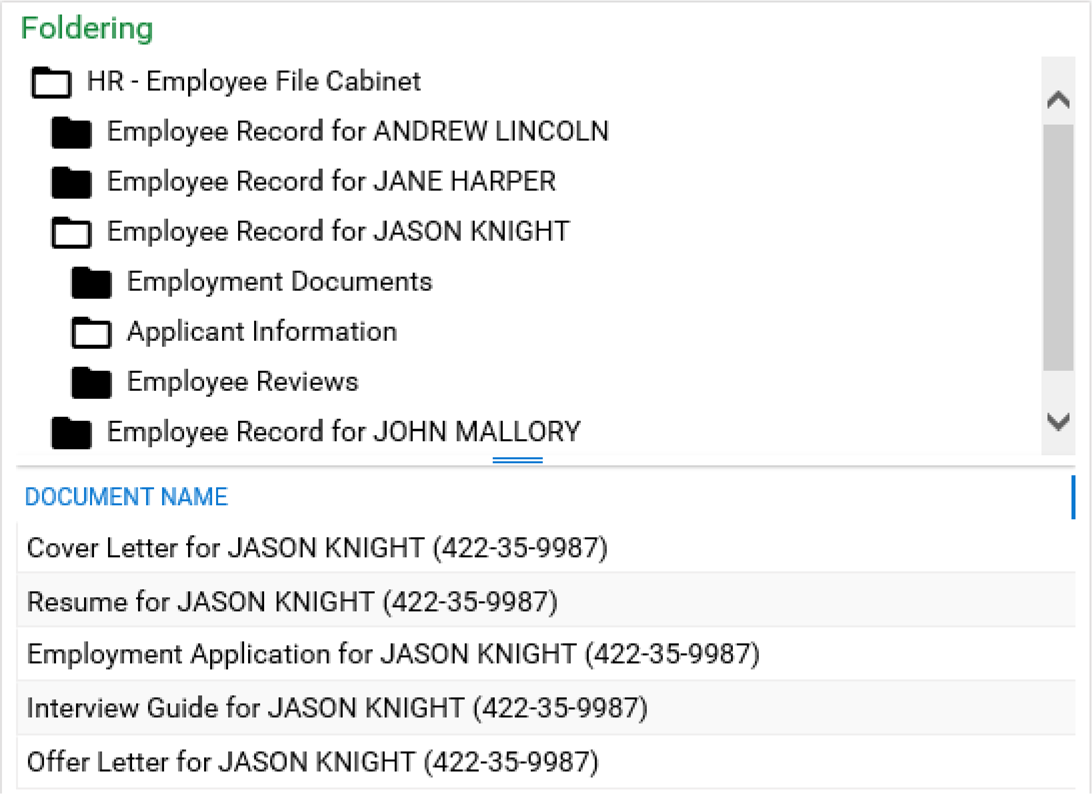
Depending on their configuration, folder portlets may allow you to browse or search for folders.

Browsing Folders

If the portlet displays a list of folders, you can click a folder to view its contents.

Depending on the portlet's configuration, contents are displayed either in the Folders window or within the portlet itself.

- If the Folders window is displayed, see Navigating the Folders Window on page 95.
- If the contents are displayed within the portlet, continue browsing the folder structure until you find the documents you are looking for. The **Documents** list displays the documents residing in the selected folder. Double-click a document to open it.



Tip: If a folder contains a long list of documents, click and drag the divider above the list to display more documents.

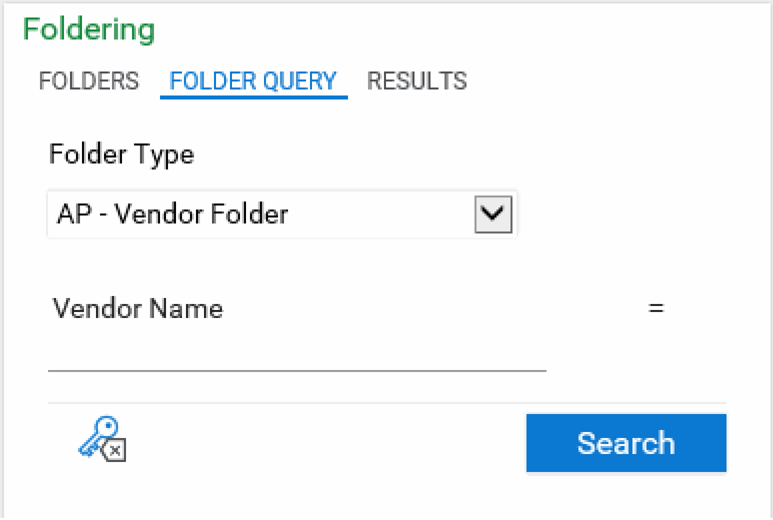
Searching for Folders

Depending on the portlet's setup, you may be able to conduct folder searches within the portlet.

Note: If your user has no configured rights to view any folder types, an error message is displayed: **There are no folder types available for searching.**

1. If necessary, click the **Folder Query** tab.
   The **Folder Query** tab is present only if the portlet is configured to both search for folders and display a list of folders by default.

2. Select a Folder Type from the **Folder Type** drop-down.



   If any Keyword Types are assigned to the selected Folder Type, Keyword Type fields are displayed.

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 (*).

3. Enter Keyword values as necessary.
    - You can use all functionality of Keywords 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.
    - If a Folder Type requires a Keyword value to be provided, the required Keyword Type is displayed in red.
    - To clear all Keyword values, click **Clear**.
4. Click **Search** to find all folders matching the criteria.
    - If the portlet is configured to display search results within the portlet, then the **Results** tab displays the folders retrieved by your search.

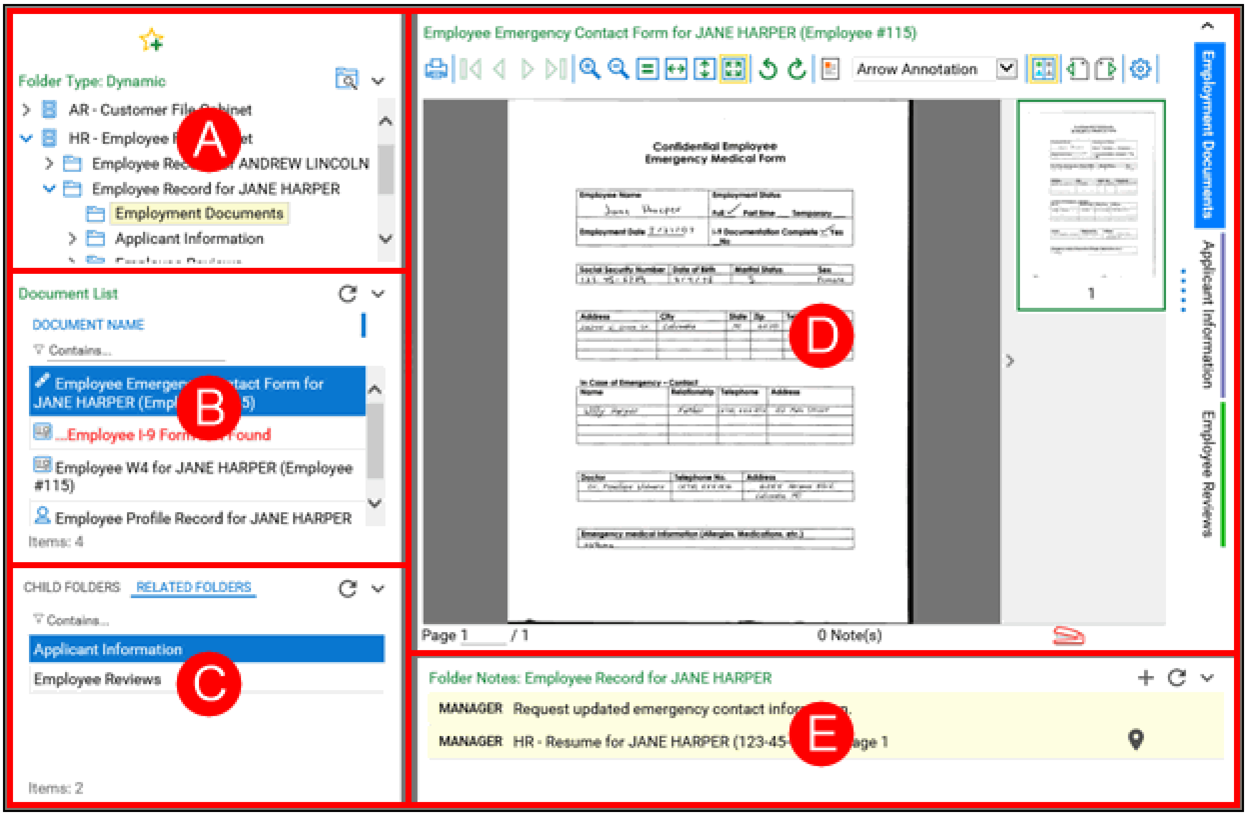
      See Browsing Folders on page 92.
    - If the portlet is configured to display search results in a new window, the Folders window is displayed.

      See Navigating the Folders Window on page 95.

Navigating the Folders Window

Depending on how the portlet is configured, the **Folders** window may be displayed when you open a folder or retrieve a folder search list.

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.

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 has the same value for one of the Keyword Types.

Display Child Folders in a Pop-up List

If the folders are configured with the **Display Child Folders in a Pop-up List** option selected, the Folders window is displayed, and the **Find Folder** dialog is displayed so you can search for the folders.

SharePoint Site Dashboard Portlets

Note: This portlet requires a Site Provisioning for Microsoft SharePoint license.

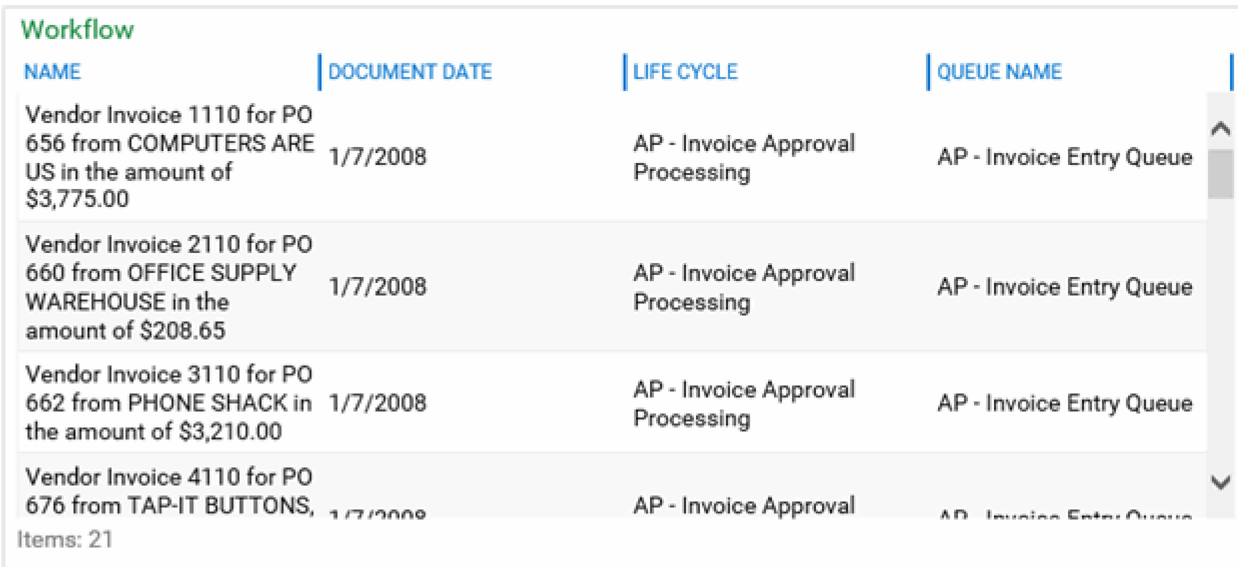
The SharePoint Site Dashboard portlet provides a log of SharePoint sites created by the Site Provisioning for Microsoft SharePoint module. Entries include the URL to the SharePoint site and the date of creation.

Double-click a URL to open the site in a new window.

Workflow Portlets

Workflow portlets display documents from selected queues. If the portlet is configured for multiple queues, then it lists the name, date, queue, and life cycle for each document.

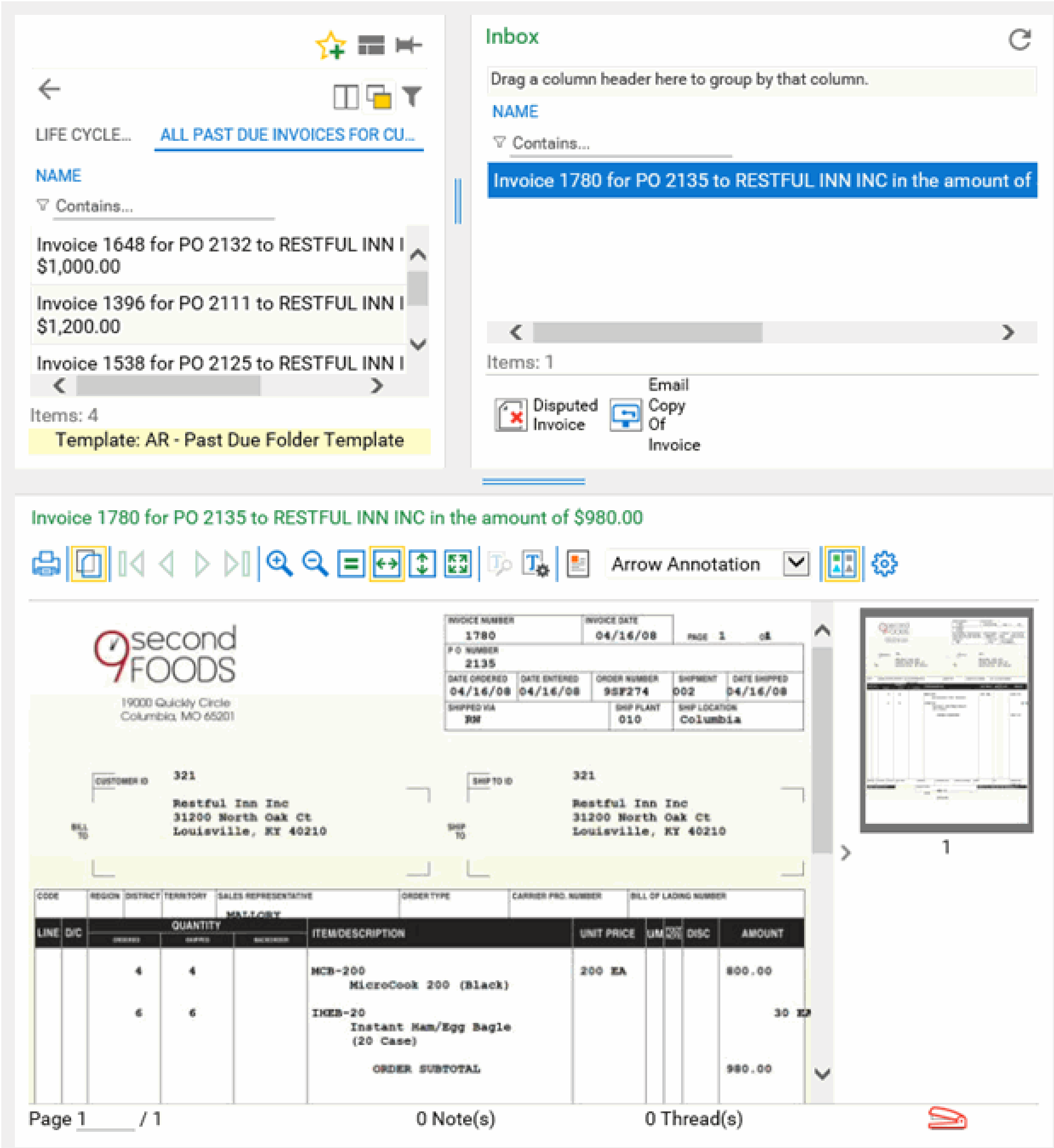
The following illustration provides an example of a Workflow portlet configured to display multiple queues:



If the portlet is configured to display only one queue, then the portlet displays only the name and date of each document in the queue.

Tip: To sort documents by column, click the column's header.

Double-click a document to open it in the Web Workflow page.



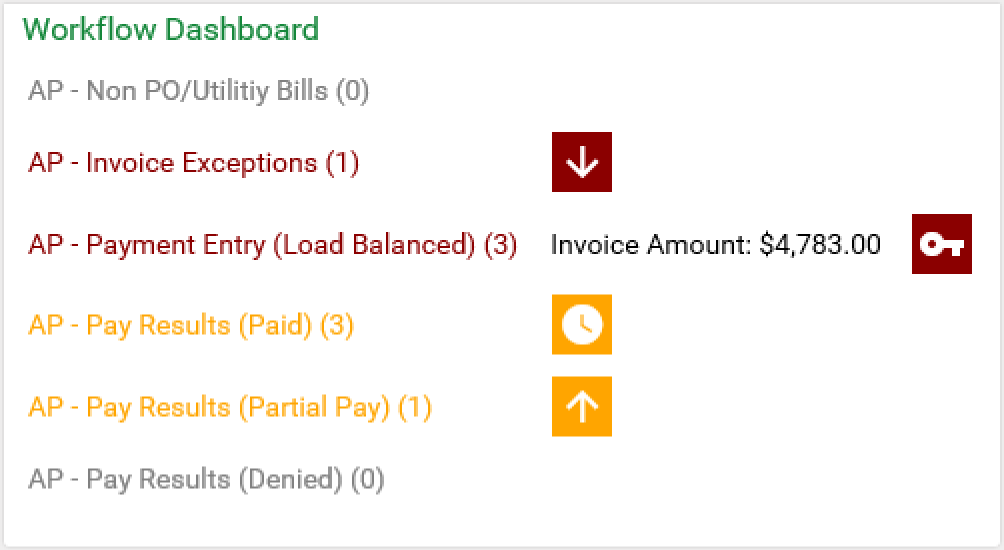
This page displays the selected document, its related documents, and ad hoc tasks configured for the document's queue. Click the **Life Cycle View** tab to view other life cycles you have rights to view.

For more information about Workflow functionality, see the Web Workflow documentation.

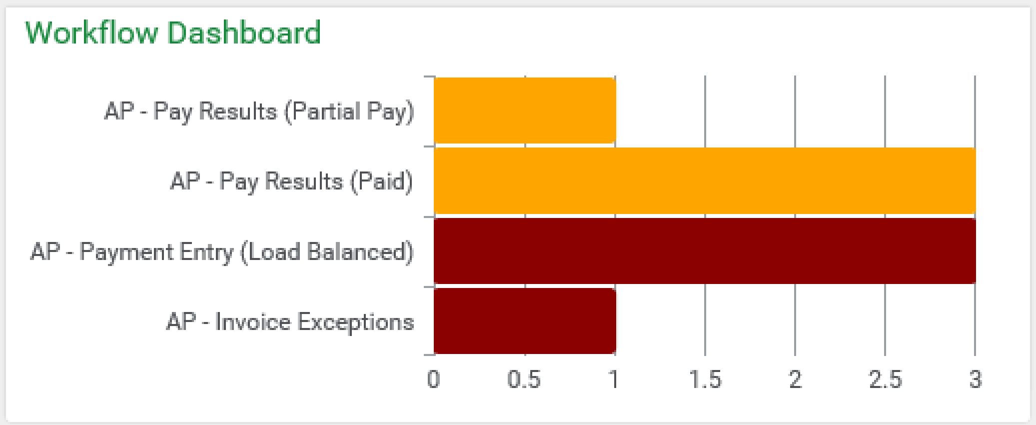
Workflow Dashboard Portlets

Note: This portlet requires a Business Activity Monitoring license.

Workflow Dashboard portlets display a configured set of Workflow queues for monitoring.



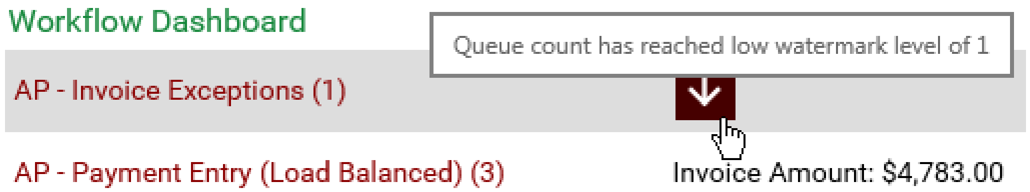
Each queue and its document count are listed. If the portlet is configured to display a chart, the chart displays a bar for each queue.



Warnings and alerts may be triggered based on the following criteria:

- Document count: The number of documents is too high or too low.
- Document age: The queue contains a number of documents that meet or exceed a configured age.
- Keyword sum: The documents’ combined value for a Keyword Type is too high.

If the document count, age, or Keyword sum triggers a warning or alert, a monitoring symbol is displayed to the right of the queue. Rest your pointer over a symbol to display its meaning.



Monitoring symbols are described in the following table:

Symbol	Description
	High watermark. This symbol indicates that the number of documents residing in a queue is at the high watermark warning or alert level.
	Low watermark. This symbol indicates that the number of documents residing in a queue is at the low watermark warning or alert level.
	Document age. This symbol indicates the document age for documents residing in the queue is at the warning or alert level. Document age is determined by the time the document entered the queue. **Note:** A tolerance setting may have been configured to allow a number of older documents to reside in the queue without triggering the warning or alert.
	Keyword sum. This symbol indicates the documents' combined value for the displayed Keyword Type is at the warning or alert level.

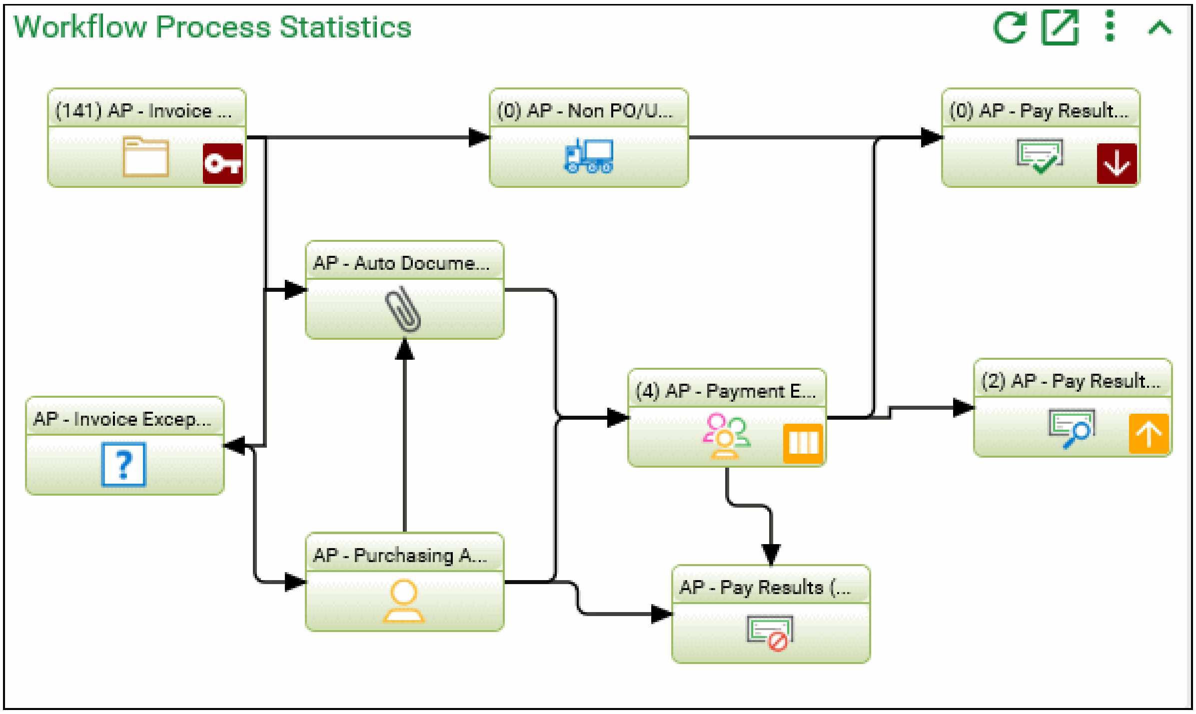
Whether the queue is at a warning or alert level is indicated by the color in which the queue's name, monitoring symbol, and bar are displayed. The default colors for warning and alert levels are orange and red, respectively.

Click a queue to open the Web Workflow page, which is described under Workflow Portlets on page 97.

Workflow Process Statistics Portlets

Note: This portlet requires a Business Activity Monitoring license.

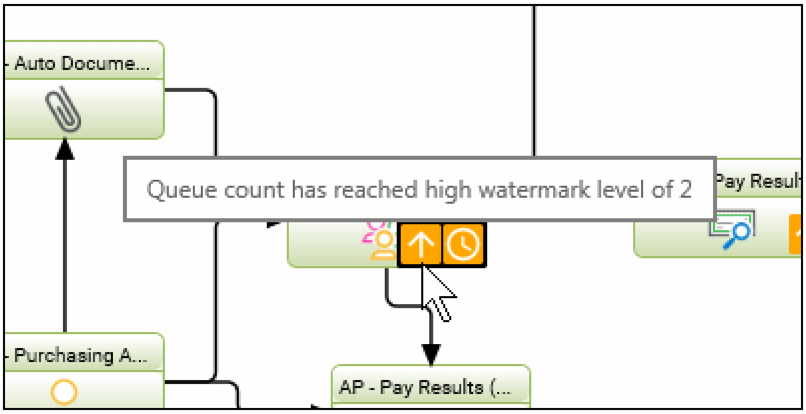
Workflow Process Statistics portlets display a graphical view of Workflow life cycles for monitoring. Each portlet provides a snapshot of a life cycle, including the number of documents in each queue and how documents are transitioned between queues. Each queue is represented by its configured shape and icon. The number of documents residing in a queue is displayed next to the name of the queue.



Warnings and alerts may be triggered based on the following criteria:

- Document count: The number of documents is too high or too low.
- Document age: The queue has contained documents past a configured amount of time.
- Keyword sum: The documents' combined value for a Keyword Type is too high.

If the document count, age, or Keyword sum triggers a warning or alert, a monitoring symbol is displayed next to the icon in the queue. Rest your pointer over a symbol to display its meaning.



Monitoring symbols are described in the following table:

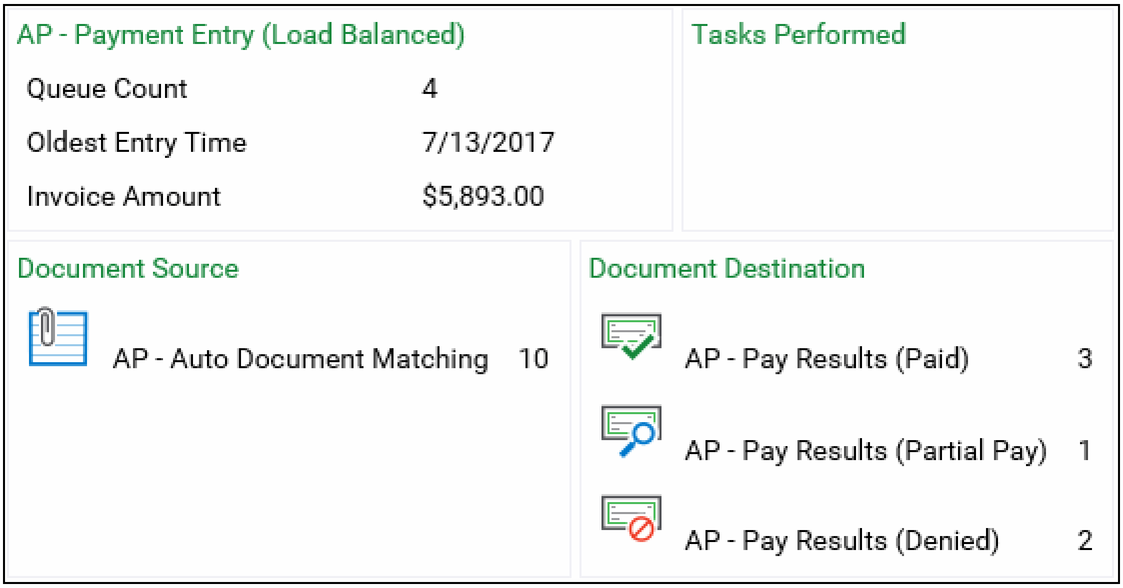
Symbol	Description
	High watermark. This symbol indicates that the number of documents residing in a queue is at the high watermark warning or alert level.
	Low watermark. This symbol indicates that the number of documents residing in a queue is at the low watermark warning or alert level.
	Document age. This symbol indicates the document age for documents residing in the queue is at the warning or alert level. Document age is determined by the time the document entered the queue. **Note:** A tolerance setting may have been configured to allow a number of older documents to reside in the queue without triggering the warning or alert.
	Keyword sum. This symbol indicates the documents' combined value for the displayed Keyword Type is at the warning or alert level.

Whether the queue is at a warning or alert level is indicated by the color in which the monitoring symbol is displayed. The default colors for warning and alert levels are orange and red, respectively.

Workflow Queue Activity Portlets

Note: This portlet requires a Business Activity Monitoring license.

Workflow Queue Activity portlets display real-time activity of actions performed in a queue for monitoring.



The panes containing this information may be arranged horizontally or vertically, depending on the amount of horizontal space available.

Workflow Queue Activity portlets are highly configurable and may display the following information:

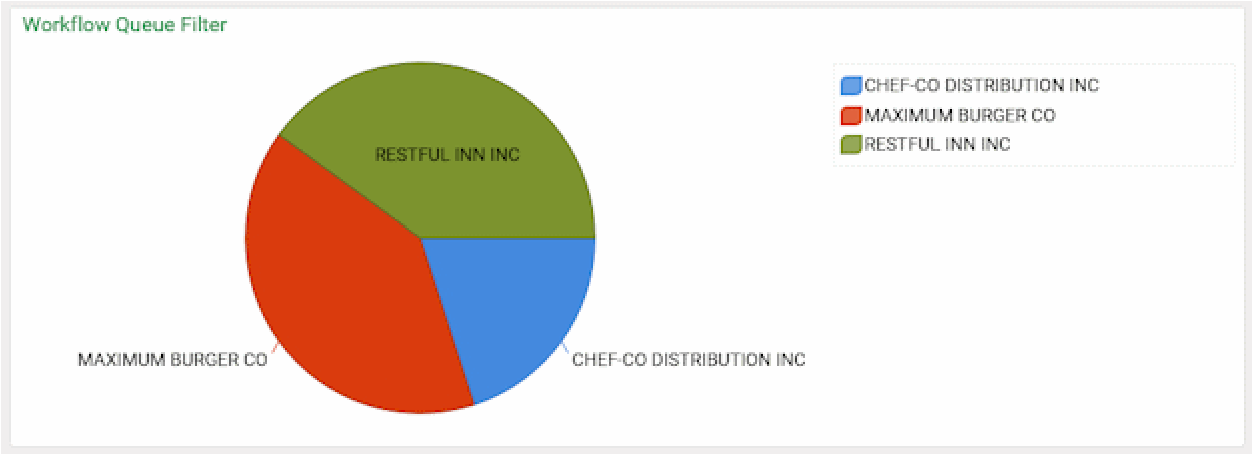
- **Queue Statistics** - This pane displays the queue's name, document count, and oldest entry date. The pane may also display a combined value for a Keyword Type from all documents in the queue.
- **Tasks Performed** - This pane displays the tasks performed at the task list level, including system work, user work, ad-hoc user tasks, and timer work. Actions and rule-level work are not included. A disabled task is counted if there is an attempt to execute it (e.g., through system or timer work).
- **Document Source** - This pane displays where the documents in the queue transitioned from. Click a queue's name to open the queue using Web Workflow. The Document Source pane displays transitional queues only. The source is not displayed for documents entering the selected queue through an import process or through document import.
- **Document Destination** - This pane displays where the documents in the selected queue transitioned to. Click a queue's name to open the queue using Web Workflow. The Document Destination pane displays transitional queues only. The destination is not displayed for documents transitioned out of the life cycle or deleted upon exiting the queue.

Workflow Queue Filter Portlets

Note: This portlet requires a Business Activity Monitoring license.

Workflow Queue Filter portlets display a filtered view of documents in a queue, grouping documents together by entry date, assigned user, or Keyword value. Results may be displayed in a pie, bar, or column chart. In the following examples, documents are grouped by Assigned To.

As an example, the pie chart view will look similar to the following:



Tip: Rest your pointer over a pie piece or bar to display the label for that part of the chart. For example, **Manager (6)** may be displayed. In this example, the information is grouped by job role, and the number **6** represents the total number of documents for **Manager**. The method for grouping and totaling varies based on the portlet's configuration. In addition, if the portlet is configured to display labels, the labels display this information automatically.

Clicking on any of the queues in the chart will open the Web Workflow page, which is described under Workflow Portlets on page 97.

To zoom in on, rotate, or print the chart, see Using the Chart Viewer on page 108.

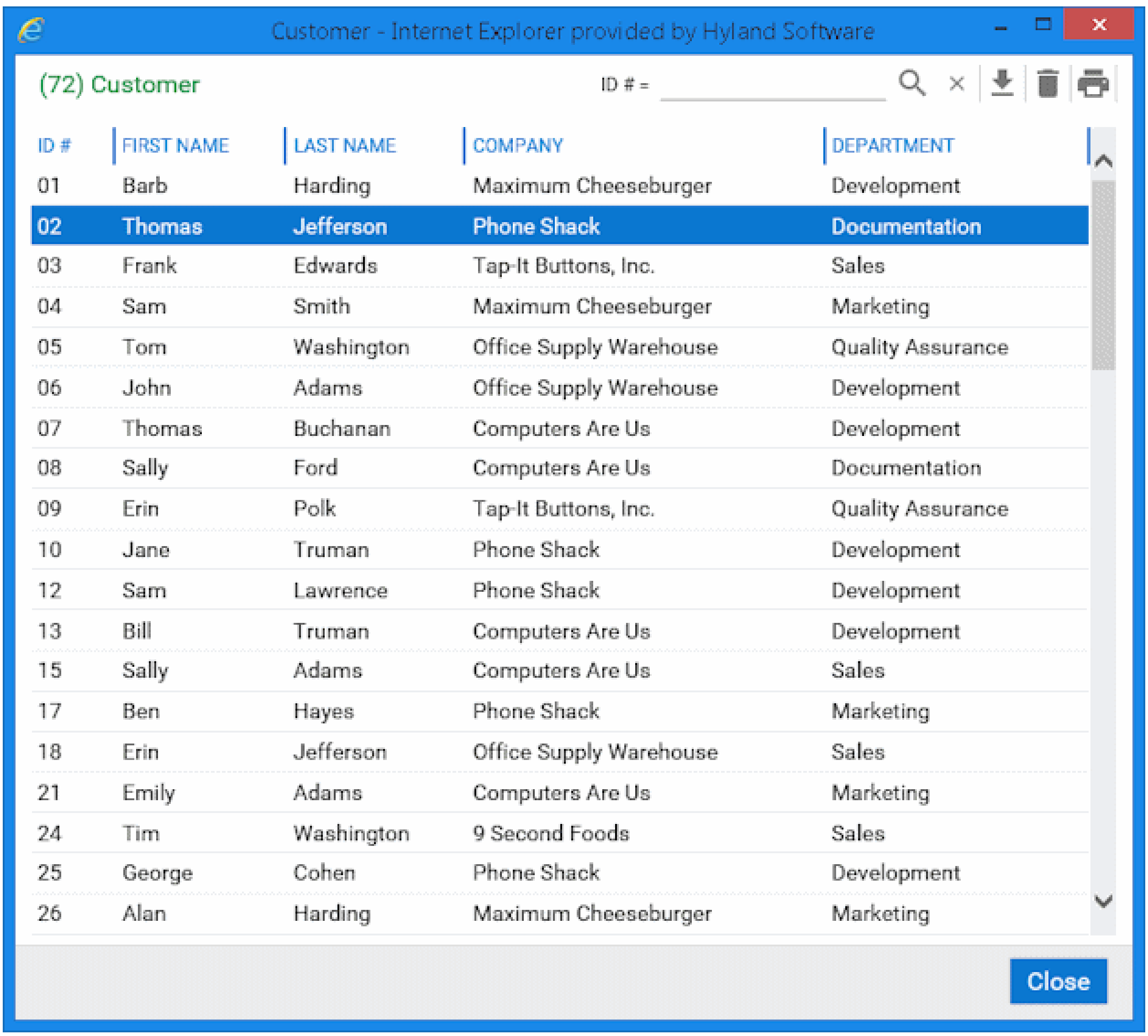
WorkView Filter Portlets

Note: If a WorkView database update is required, a message is displayed in place of WorkView content.

WorkView portlets are windows to WorkView filters. Depending on the filter selected, the portlet may display a list of objects, or it may display search fields and a search button.

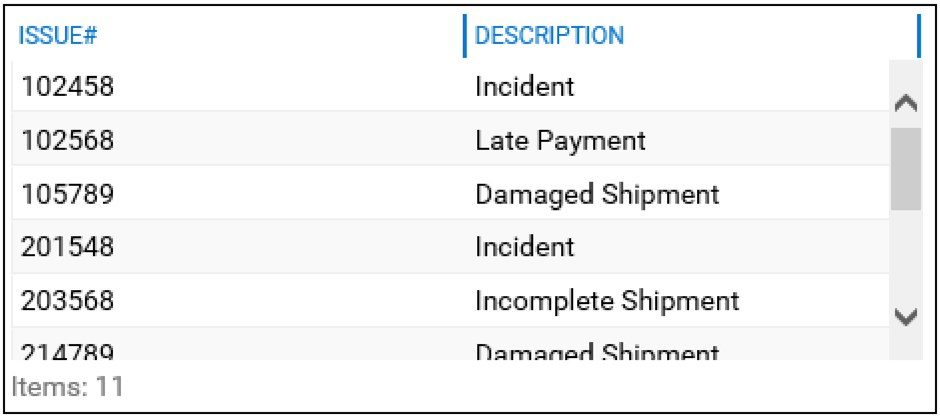
The following is an example of a filter that is configured to display search fields with User Entry Constraints.

The results are configured to display in a new window. Double-click an object to open it.



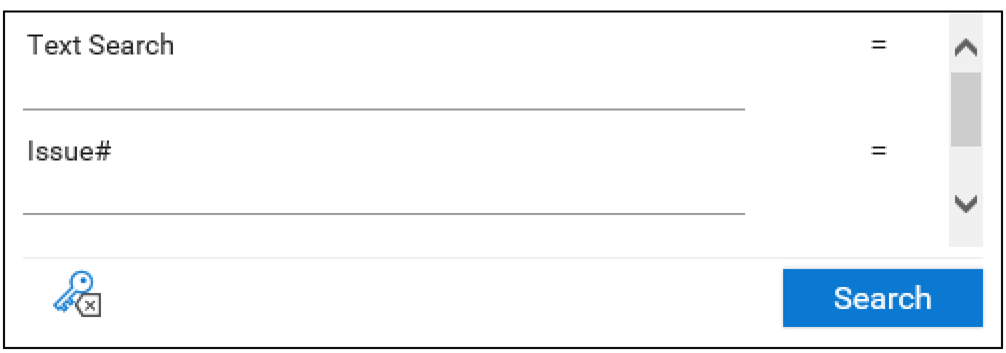
ID #	FIRST NAME	LAST NAME	COMPANY	DEPARTMENT
01	Barb	Harding	Maximum Cheeseburger	Development
02	Thomas	Jefferson	Phone Shack	Documentation
03	Frank	Edwards	Tap-It Buttons, Inc.	Sales
04	Sam	Smith	Maximum Cheeseburger	Marketing
05	Tom	Washington	Office Supply Warehouse	Quality Assurance
06	John	Adams	Office Supply Warehouse	Development
07	Thomas	Buchanan	Computers Are Us	Development
08	Sally	Ford	Computers Are Us	Documentation
09	Erin	Polk	Tap-It Buttons, Inc.	Quality Assurance
10	Jane	Truman	Phone Shack	Development
12	Sam	Lawrence	Phone Shack	Development
13	Bill	Truman	Computers Are Us	Development
15	Sally	Adams	Computers Are Us	Sales
17	Ben	Hayes	Phone Shack	Marketing
18	Erin	Jefferson	Office Supply Warehouse	Sales
21	Emily	Adams	Computers Are Us	Marketing
24	Tim	Washington	9 Second Foods	Sales
25	George	Cohen	Phone Shack	Development
26	Alan	Harding	Maximum Cheeseburger	Marketing

The following is an example of a filter that lists objects without searching. Double-click an object to open it. All WorkView functionality available for an open object is available when the object is accessed through Web Parts for Microsoft SharePoint.

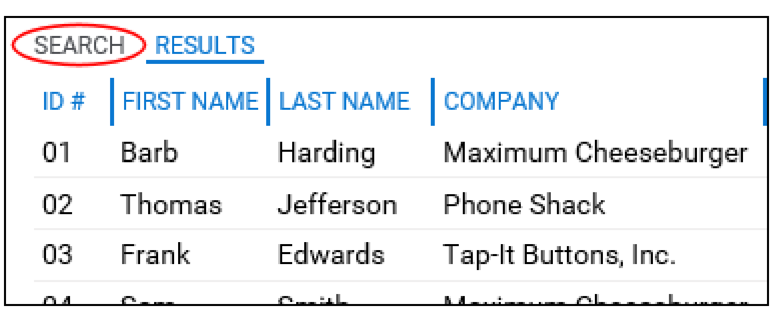


Tip: To sort results by column, click the column's header.

The following is an example of a filter that displays search fields. Enter the search parameters in the search fields and click **Search**.



A list of objects is displayed. Double-click an object to open it. If the results are displayed within the portlet, click the **Search** tab to perform a new search.



WorkView Summary Portlets

The WorkView Summary portlet is displayed in one of three views: Tabular, Pie Chart, or Bar Chart.

Tabular

The following is an example of the tabular view:

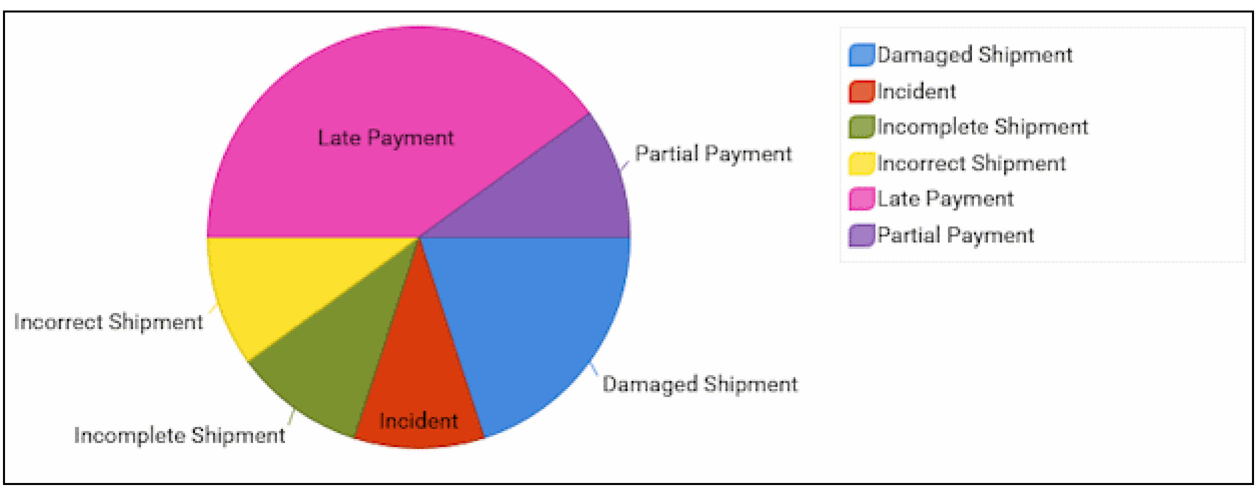
NAME	COUNT	PERCENT
Damaged Shipment	2	18.18
Incident	2	18.18
Incomplete Shipment	1	9.09
Incorrect Shipment	1	9.09
Late Payment	4	36.36
Partial Payment	1	9.09

Items: 6

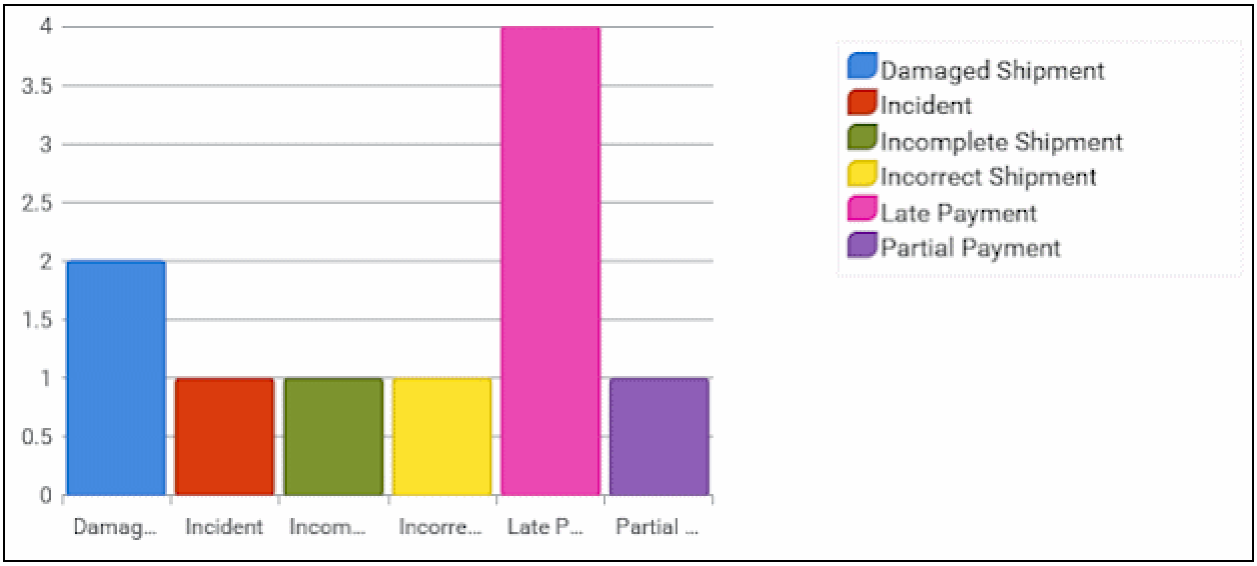
Double-click any category to display a list of WorkView objects that belong to the category.

Pie Chart and Bar Chart

The following example illustrates the pie chart view:



The following example illustrates the bar chart view:



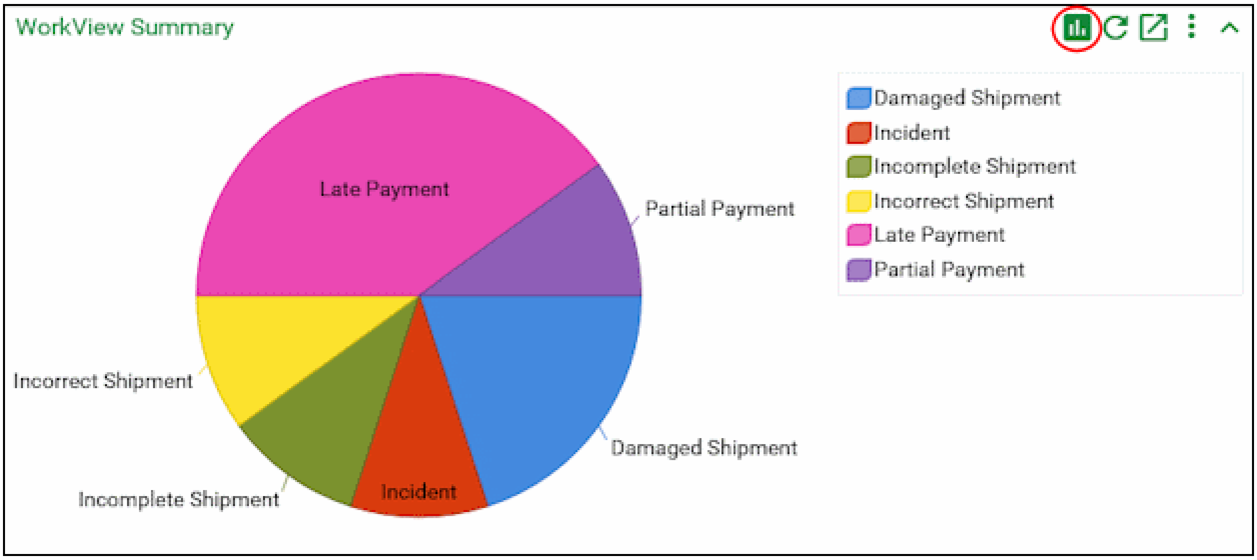
Click on any category in the chart to display a list of WorkView objects that belong to the category.

To zoom in on, rotate, or print the chart, see Using the Chart Viewer on page 108.

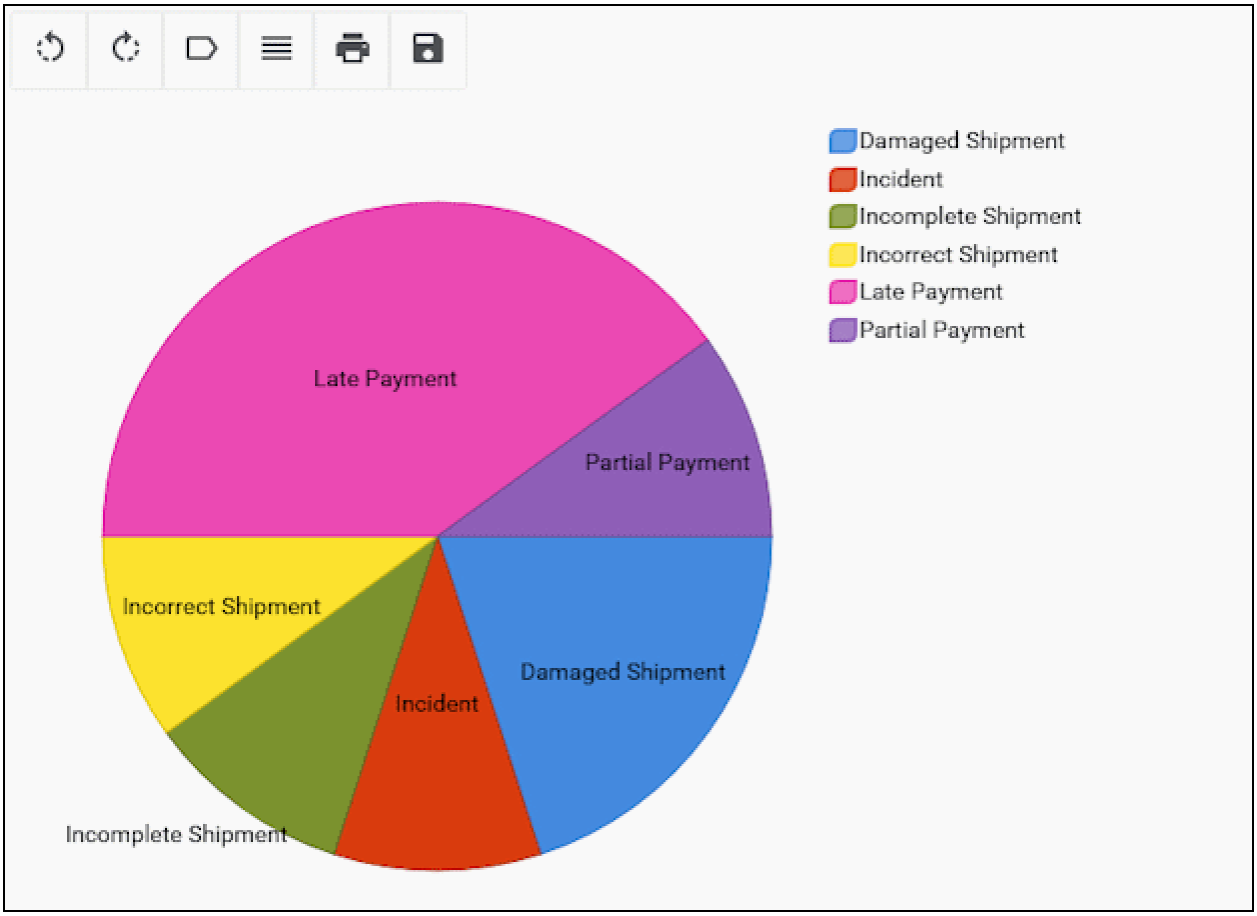
Using the Chart Viewer

Both the Workflow Queue Filter and WorkView Summary portlets can display data in as a chart or graph.

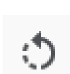
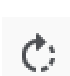
To zoom in on the chart and see all labels, click the **Open Chart** button displayed in the title bar of the portlet.



When you click **View**, the Chart Viewer window opens and lets you perform several tasks.



Use the buttons at the top of the window to rotate, toggle the labels and legend, print, or save the chart.

Button	Description
	Rotates the chart horizontally to the left.
	Rotates the chart horizontally to the right.
	Hides or displays the chart labels.

Button	Description
	Hides or displays the chart legend.
	Prints the display.
	Saves the display in a .png format in its current rotation.

Viewing Documents & Folders

This section is a guide to using the Document Viewer that is opened when you retrieve documents using Web Parts for Microsoft SharePoint. This section also contains information about using Folders accessed from a Folder search.

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.

Folders

Folders provide the ability to group documents in a familiar file structure user interface.

Folders are similar to envelopes from a document retrieval perspective. However, there are some key differences:

- Some folders are designed to automatically pull documents in based on Keyword Value and Document Type.
- A system administrator must configure the file cabinet in order for a user to be able to create folders.
- Not all folders are user-creatable. This is determined by your system administrator.
- Some documents automatically create the folder structure as they are imported into OnBase.

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.

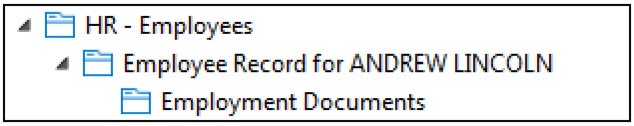
Folder Definition

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.

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.

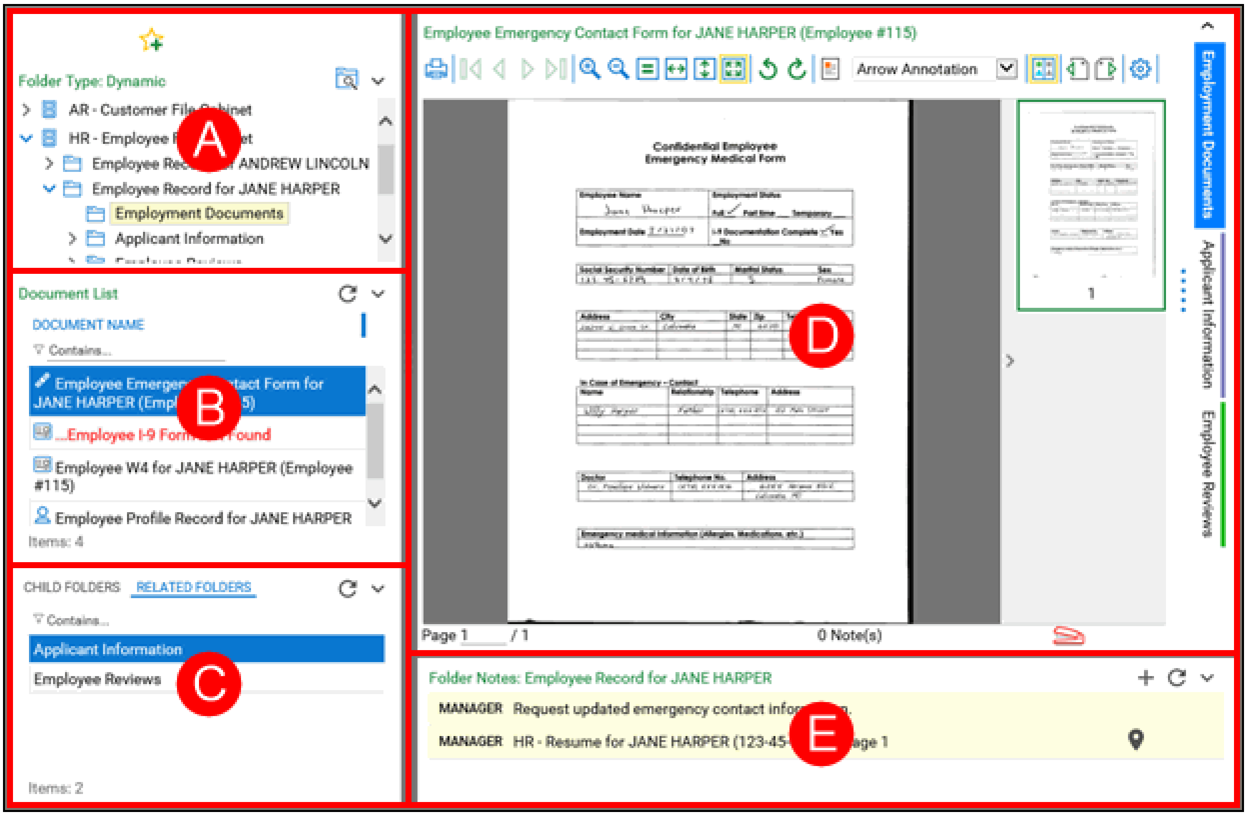
  If a folder is both static and dynamic, documents containing Keyword Values not matching the folder Keyword Values can be added manually. If a folder is dynamic only, documents cannot be manually placed in or removed from the folder from within OnBase.

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).

Note: File cabinets and folders are configured by your system administrator. You may not have file cabinets and folders, depending on your system's configuration. You must have appropriate privileges to view, modify, add documents to, or remove documents from 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.

Folders are displayed in the **Folder Tree** pane.

- The first document in the selected folder displays in the Document Viewer.
- The list of all child folders of the selected folder displays in the **Child Folders** pane.
- The list of all documents in the selected folder display in the **Documents** pane.

To expand a folder, click the arrow next to its name.

Note: When you expand a folder that contains no documents, the Web Client displays **No Documents Found** immediately below the folder name. This message also relates only to the folder itself, and does not mean that the child folders are empty. You can determine how many documents a folder contains by hovering your mouse pointer over the folder name. If the folder shows **0** (zero) documents, that means only that there are no documents within that particular folder; its child folders may contain documents.

Note: Some systems are configured to display a list of all of the documents of all child folders upon clicking the parent folder. See your system administrator for additional information regarding the Include Child Folder Static Contents option in Folder Type configuration.

Open the folder using one of the following methods:

- Double-click on the folder.
- Select the folder, right-click and select **View Selected**.

Note: The right-click options available to you may vary according to your assigned privileges and the modules included in your OnBase solution.

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 **Documents** pane and choose **Open in New Window** from the right-click menu.

Displaying Find Folder Feature Upon Clicking a Folder

Some Folder Types are configured to open 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 120.

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.

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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.

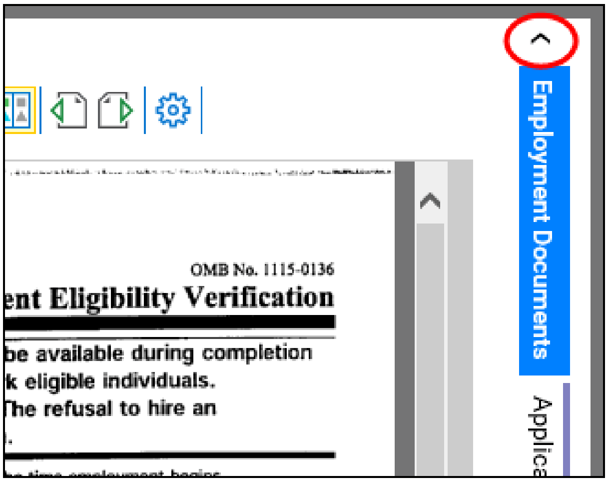
   

3. Repeat these steps for each child folder you need to view. Each subsequent folder is added to the **Folder Tree** pane, making it easy to work back and forth between them.

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 tab available above the child folder tabs:



This tab is available when the current folder is configured to be displayed as a tab.

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.

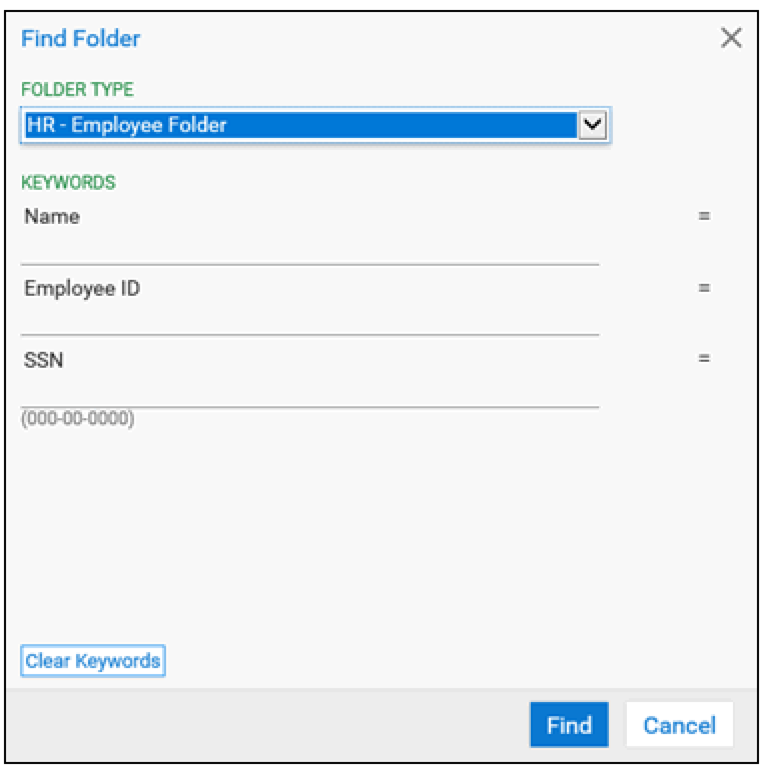
To initiate a folder search:

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.



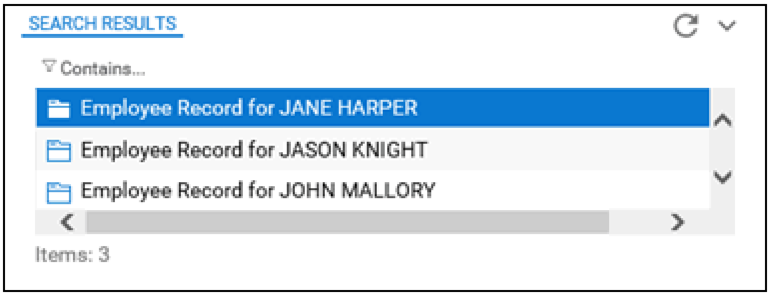
2. From the **Folder Type** drop-down list, select a Folder Type. The **Find Folder** dialog box displays any Keyword Types assigned to the selected Folder Type.

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.

Applying a Folder Template

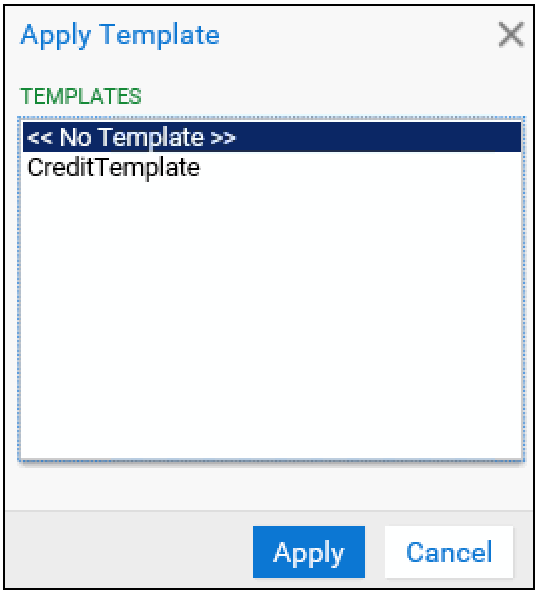
Folder templates help you navigate a folder's contents by doing the following:

- 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.

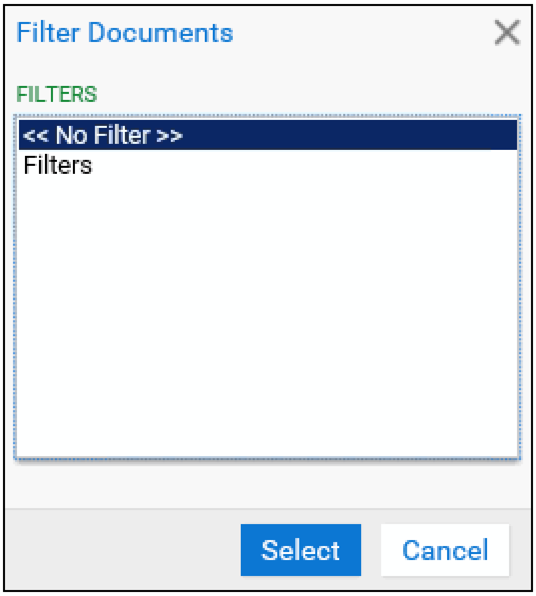
A folder template and a folder filter cannot be applied to a folder simultaneously. If you apply a filter to a folder with a template applied, the template is removed before the filter is applied. If you apply a template to a folder with a filter applied, the filter is removed before the template is 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 125
- Adding Documents to Static Folders on page 125
- Copying or Moving Documents to Folders on page 127
- Removing Documents from Folders on page 128

Adding Documents to Dynamic Folders

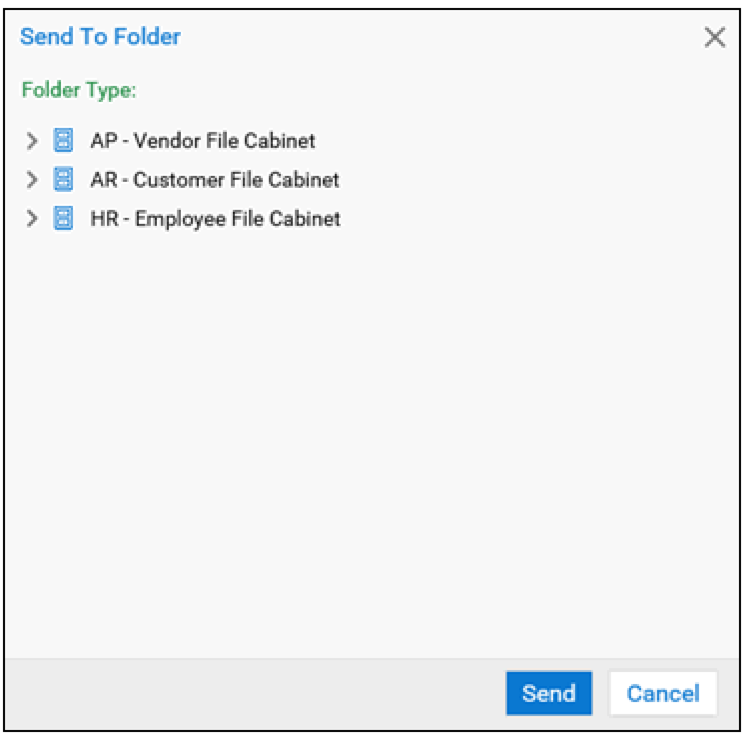
A dynamic folder contains Document Type and Keyword Value criteria that OnBase will use to find documents.

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

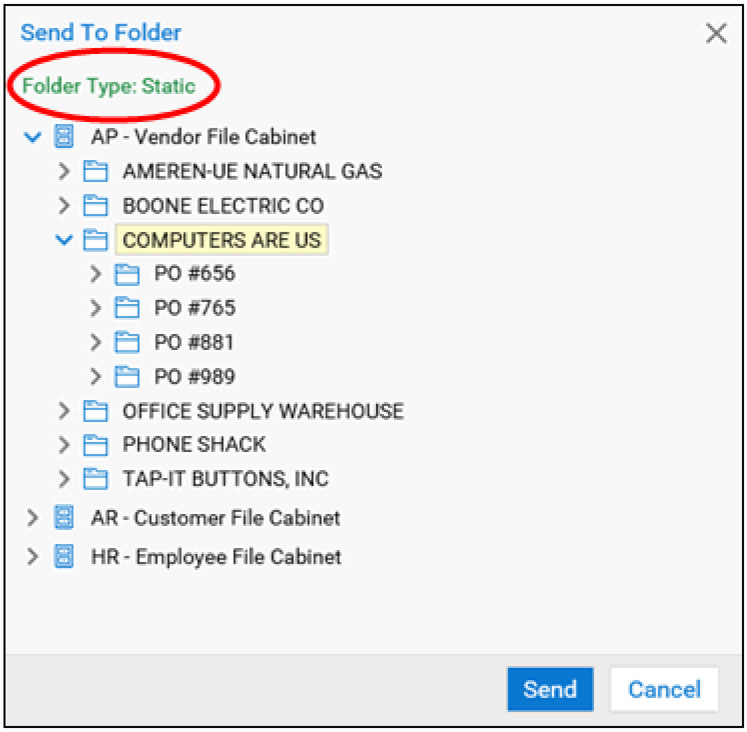
If you have sufficient privileges, you can add documents residing in OnBase to static folders. A single document can reside in multiple folders because folders contain pointers to documents rather than actual copies.

1. Select one or more documents from a Document Search Results list.
2. Right-click the document(s) and select **Send To | Folder**. The **Select A Target Folder** dialog box is displayed.



3. Select the folder where you want to add the document(s).

4. Ensure the **Folder Type** bar above the folder tree says **Static** or **Static/Dynamic**. Documents cannot be manually added to a dynamic folder.



5. Click **OK** 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.

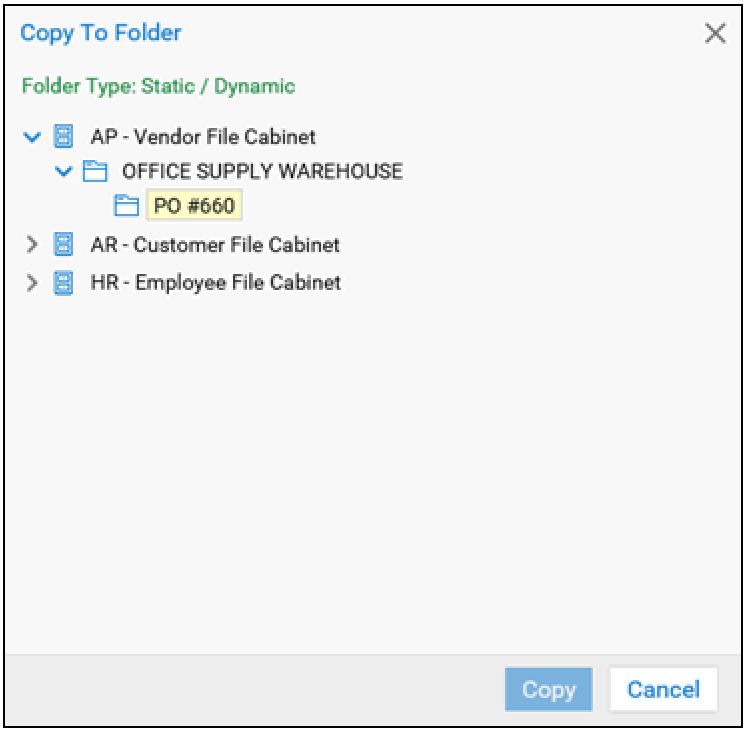
  The folder is locked by another OnBase user, process, or module. For example, if a user is modifying the folder's Keyword Values in the OnBase Client, then you cannot add a document to the folder.

Copying or Moving Documents to Folders

If you have sufficient privileges, you can organize folder contents by moving and copying documents to static folders.

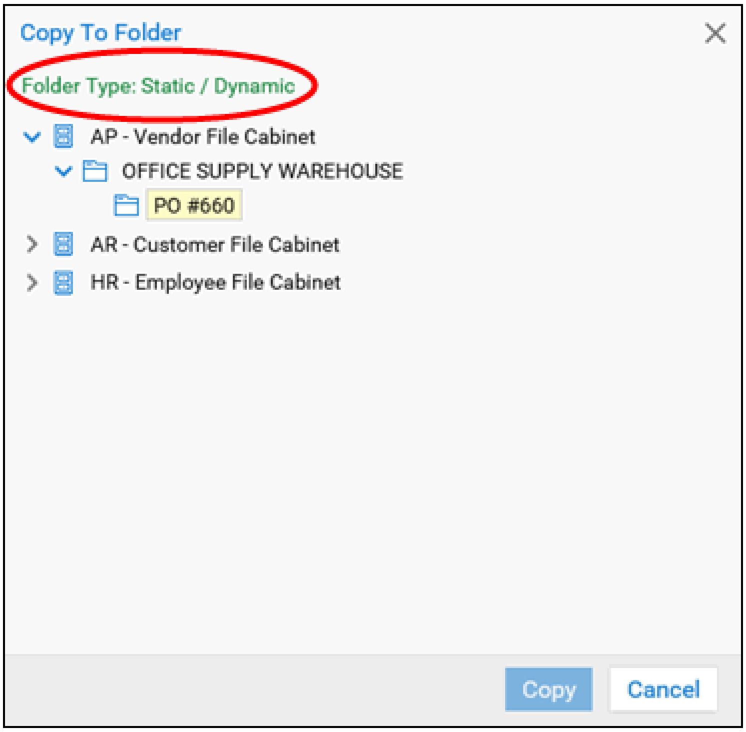
1. Open the folder containing the document you want to move or copy.
2. Select the document you want to move or copy from the **Document List** pane. To select multiple documents, press **Ctrl** as you select each one.
3. Right-click and select one of the following options:
   - Select **Copy To Folder** 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 120.
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**.

Removing Documents from Folders

If you have sufficient rights, you can remove documents from static folders. Select the document from the **Documents** pane, right-click, and select **Remove From Folder**.

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:

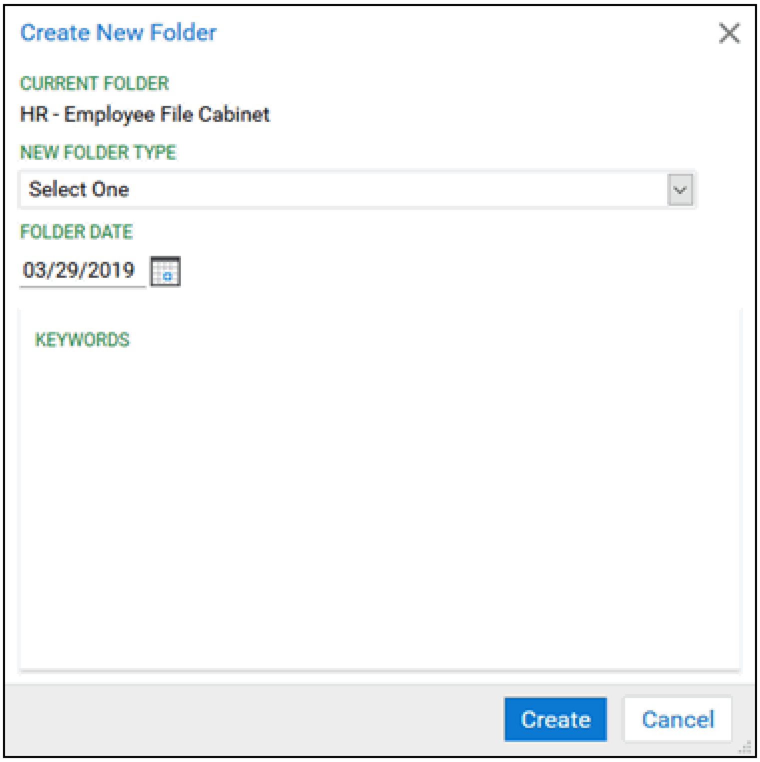
- Adding a Folder on page 129
- Deleting a Folder on page 130

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.

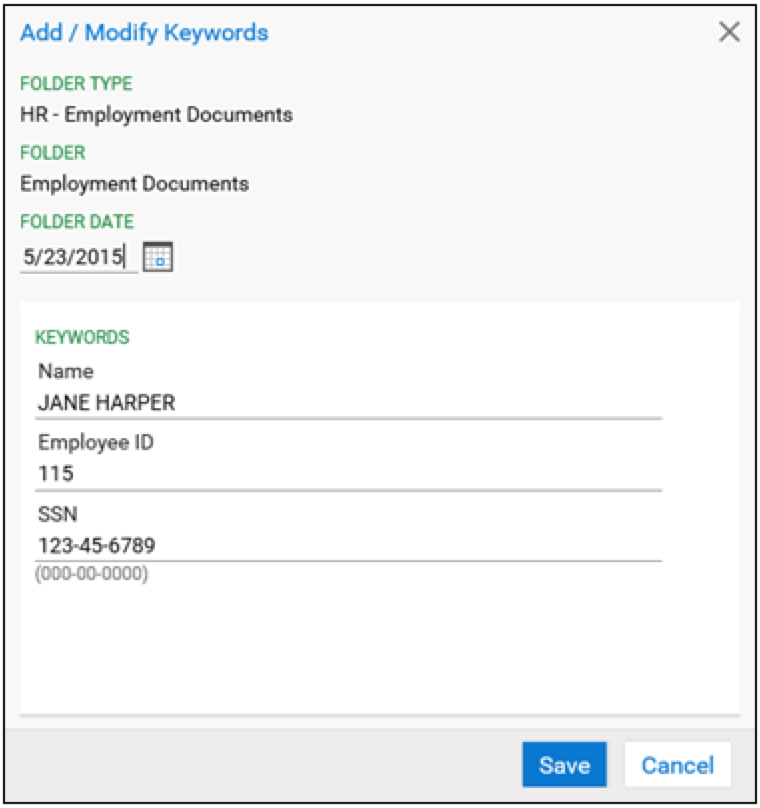
Changing Folder Keyword Values

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.

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**.

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.
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.

Document Viewer Shortcuts

The following keyboard shortcuts can be used when viewing documents:

Navigating Documents

The following keyboard functions allow you to navigate a document.

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

Zooming In and Out

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

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

Searching for Internal Text

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

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

Viewing Previous or Next Documents

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

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

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

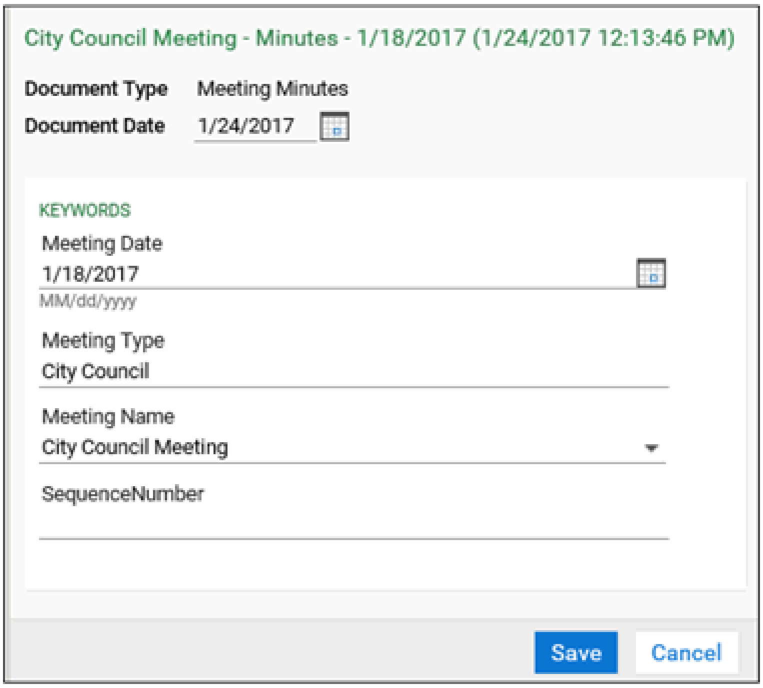
Access a Document's Keyword Values

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

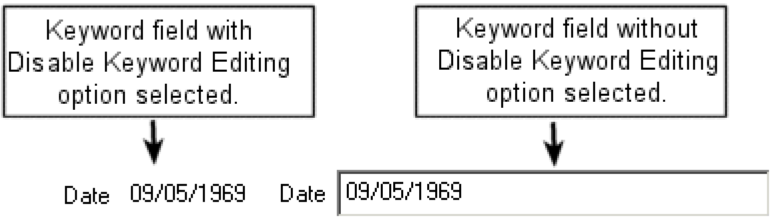
To access a document's Keyword Values, do one of the following:

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

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



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



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

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

Retrieving Cross-Referenced Documents

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

From Image or Text-Based Documents

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

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

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

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

From E-Forms or HTML Documents

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

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

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

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

From PDF or OLE Documents

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

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

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

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

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

Deleting Documents

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

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

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

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

Deleting an Open Document

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

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

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

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

Navigate

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

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

Scale

The Scale feature provides options for viewing documents.

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

Process

There are several process options available when viewing documents.

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

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

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

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

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

Note: You can only save rotations on image documents.

Display

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

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

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

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

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

Send To Options

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

Display Considerations

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

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

From an Open Document

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

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

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

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

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

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

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

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

From the Document Search Results List

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

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

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

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

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

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

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

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

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

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

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

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

Emailing Documents

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

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

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

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

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

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

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

Emailing a Document

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

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

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

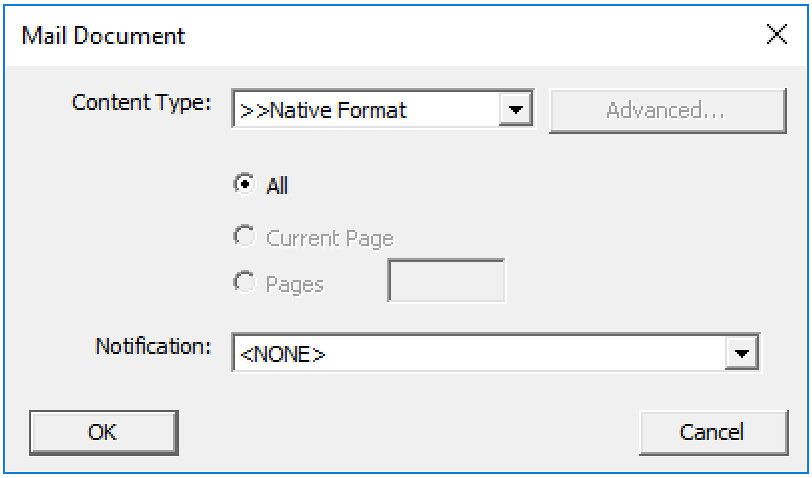
- If your default mail client is IBM Lotus Notes, emails composed in OnBase are auto-saved in the IBM Lotus Notes drafts folder. When emails are discarded in OnBase before being sent, they are not removed from the IBM Lotus Notes drafts folder.
- Email signatures cannot be automatically added for certain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

To email a document in the Web Client:

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

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

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



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

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

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

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

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

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

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

4. Select one of the following page options:

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

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

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

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

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

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

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

Attachment Display Considerations

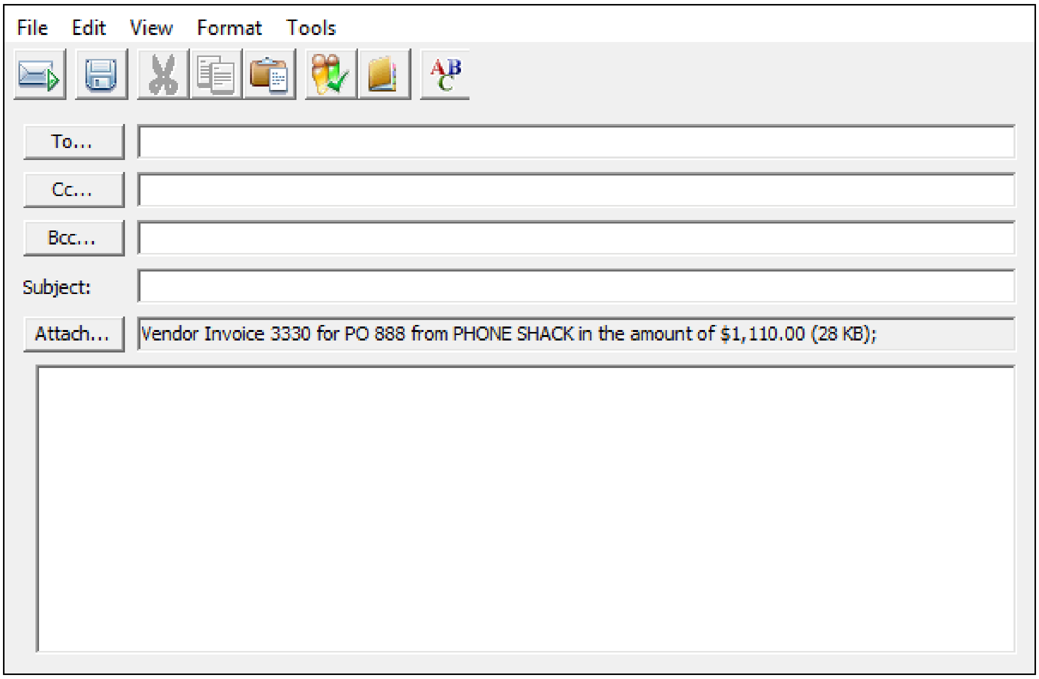
If the document you are sending has an overlay, the overlay is displayed on the attachment only if the overlay is displayed by default when you open the document in OnBase. Overlays are not displayed on attachments sent with a content type of **Native Format**, **Original Format**, or **Text (.txt)**.

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

Using the Mail Message Dialog Box

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

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



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

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

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

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

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

Checking Names and Addresses

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

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

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

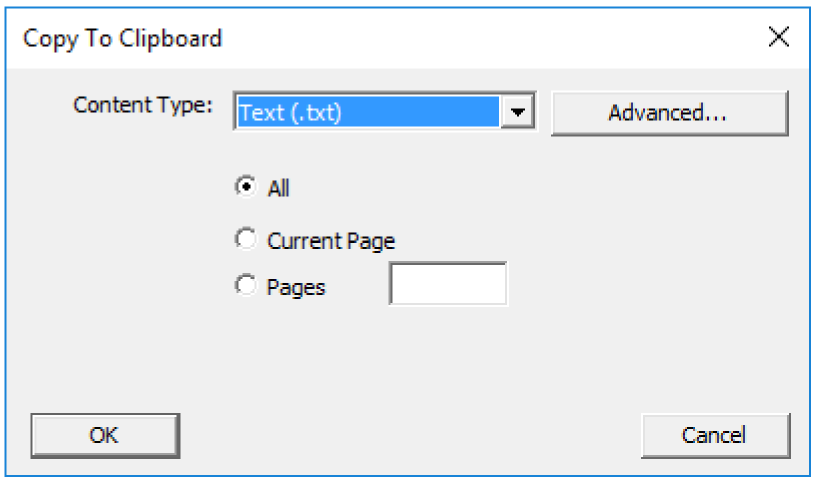
Send To | Clipboard - Copying Documents to the Clipboard

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

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

To copy a document to the clipboard:

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



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

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

3. Click **OK**.

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

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

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

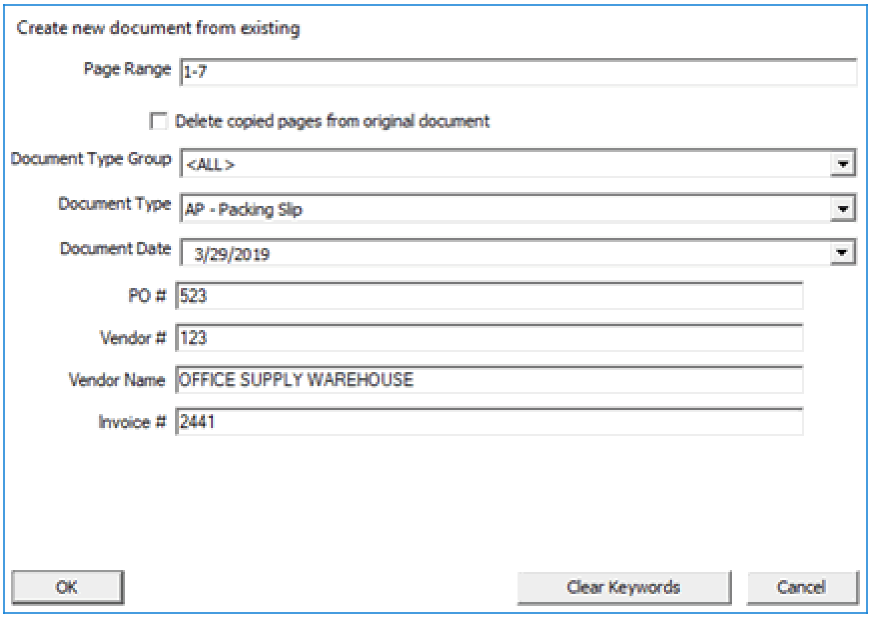
- If any Document Type in the **Search Results list** has **Copy to Clipboard/Save As** and **Create New** privileges, the **Create New Document** menu option is visible.
- If an individually selected document type in the **Search Results list** has **Copy to Clipboard/Save As** privileges, the **Create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

Create New Documents Using ActiveX

To create a new document using ActiveX controls:

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

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



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

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

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

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

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

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

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

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

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

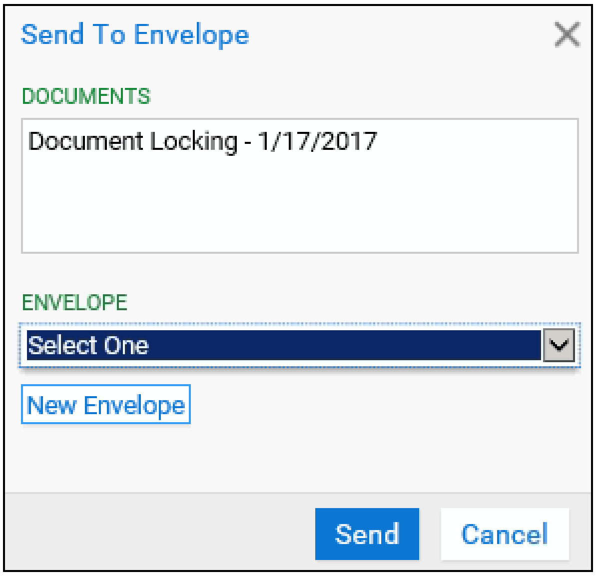
   Depending on your user rights, the new document may not contain masked Keyword Values from the original document. See the **Encrypted Alpha Keywords** documentation for more information.
6. Depending on your system's configuration and licensing, the **Add To Workflow** option may be available. Select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

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

Adding Documents to an Envelope

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

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



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

Saving Documents to Files

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

You can save documents to files in the following ways:

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

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

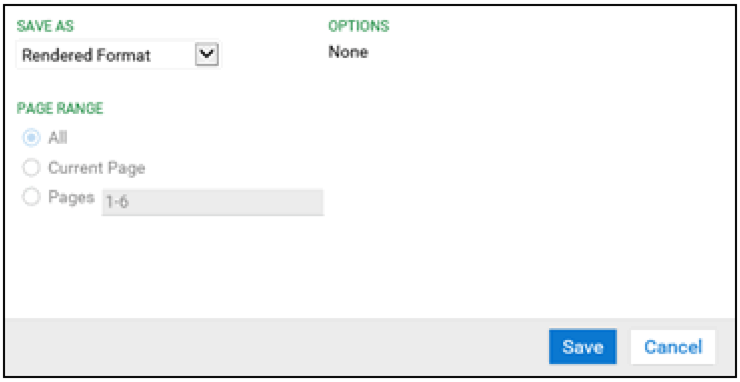
The following steps describe how to save one or more documents to a file:

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

     Saving multiple documents requires downloading the documents to a single .zip file. For information on saving multiple documents from the Document Search Results List, see Saving Multiple Documents to a Zip File on page 165.
   - From an open text or image document, right-click and select **Send To | File**, or click the **Save to File** toolbar button.

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

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



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

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

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

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

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

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

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

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

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

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

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

7. Click **OK**. The **Save As** dialog box is displayed.
8. Modify the file's name and location as needed. See File Naming Conventions on page 165 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.

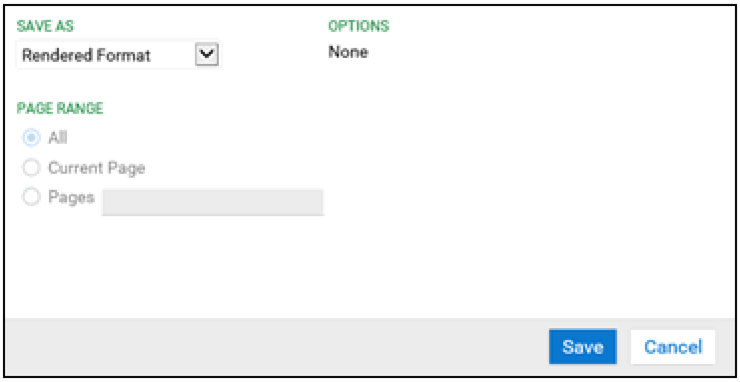
If the default **Save As** location already contains a file with a matching file name, OnBase automatically appends the new file's name with an underscore and an incremental number. For example, if **Checking Statement Acct#1020** already exists in the default **Save As** location, OnBase will name the new file **Checking Statement Acct#1020_1.tif**. See Character Substitutions on page 166 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 161 for more information on saving documents to a specific content type.

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

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

Character Substitutions

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

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

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

Printing

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 167.
- For printing documents in the HTML document viewer, see Printing Documents in the HTML Document Viewer on page 174.

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.

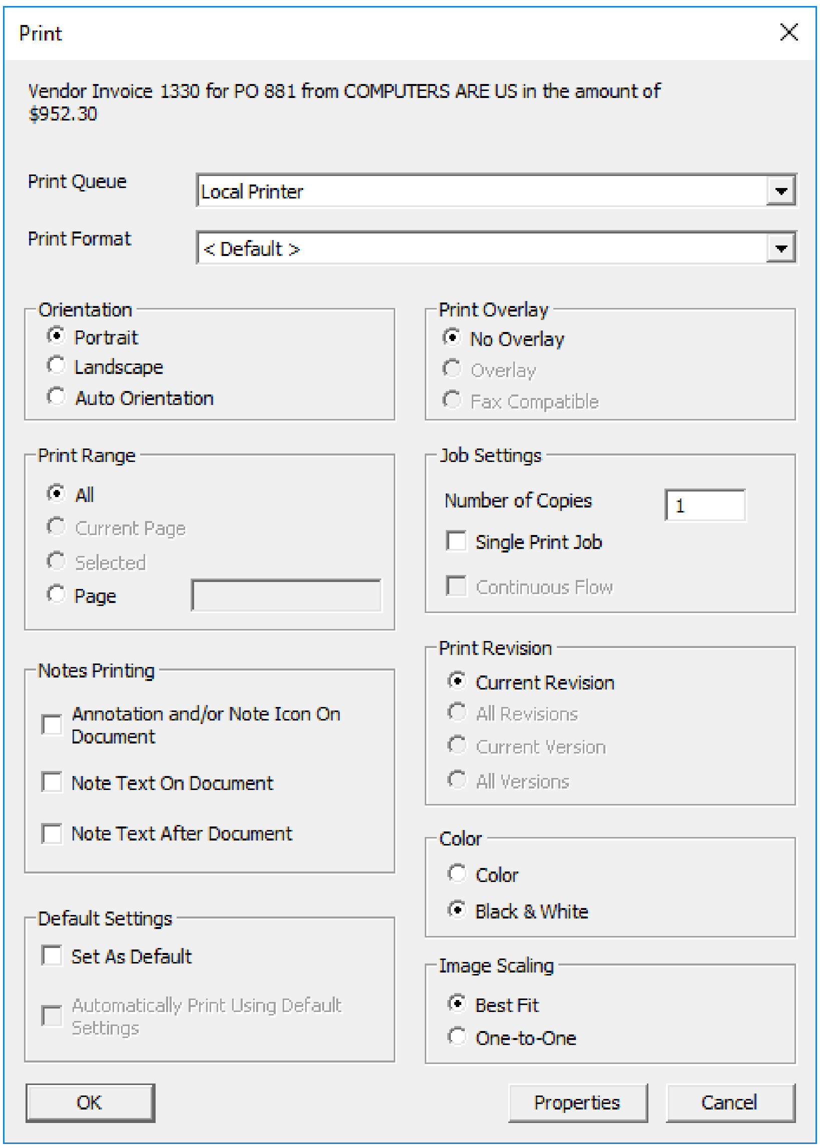
- From an open OLE document, select **Document | Print**.

  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 180.
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

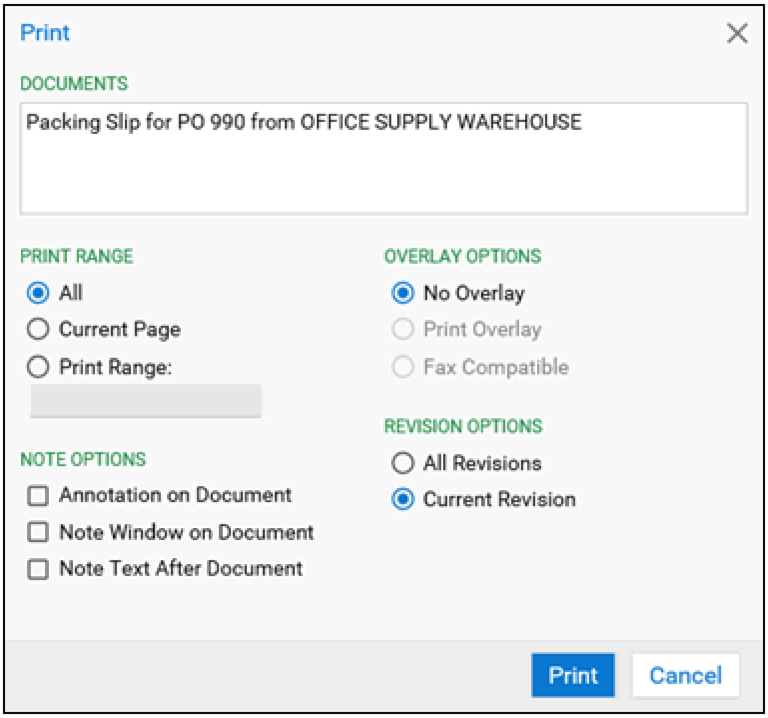
You can print documents using the HTML document viewer if you have sufficient privileges. Documents are first converted to a PDF, which you can then print using the PDF viewer's print option.

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.

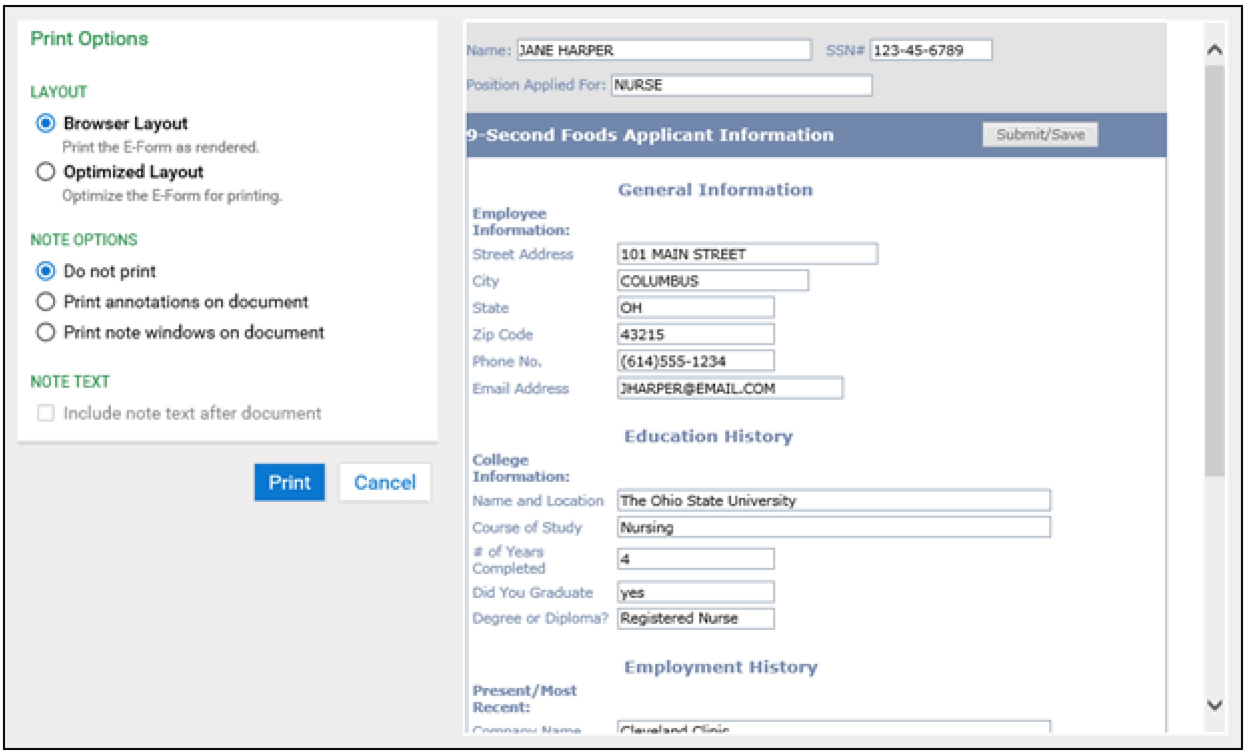
   Depending on your configuration settings, your browser's print dialog box may also be displayed.
4. Click **Print** to continue printing the document.

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

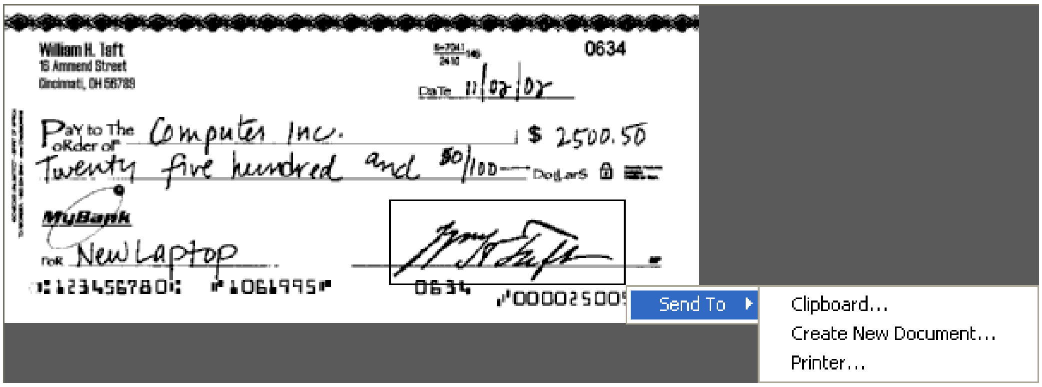
You can print or copy an area of a text or image document using the Rubber Band feature. Copied content can be pasted into another program or be used to create a new document in OnBase. To successfully print or copy selected areas of a text document with an overlay applied, the overlay must be removed.

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

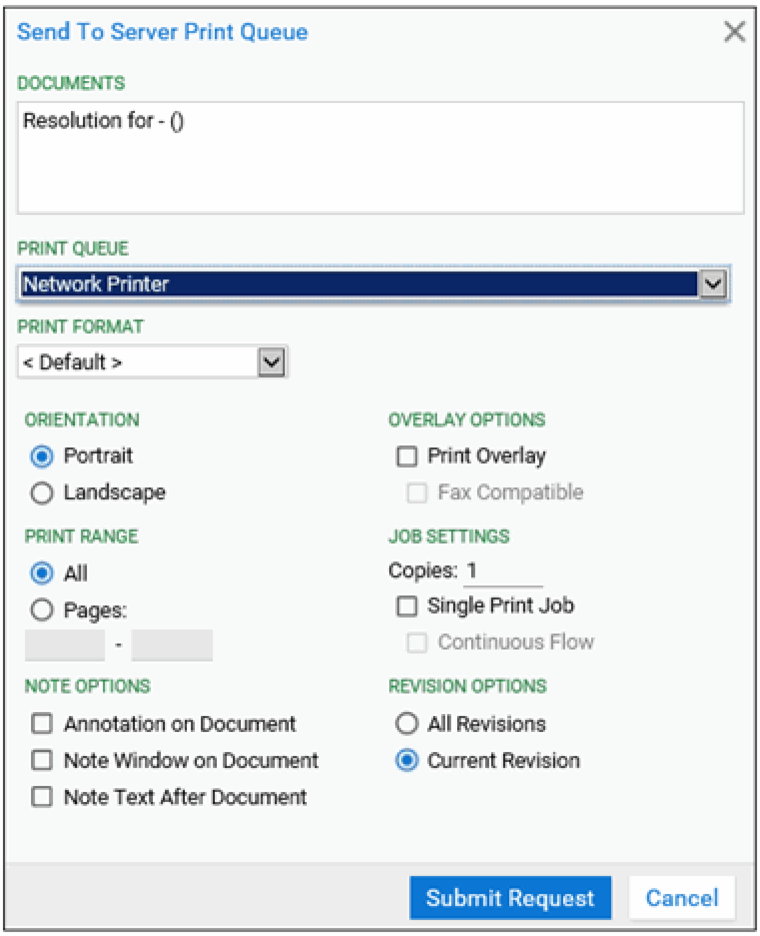
If you have sufficient privileges, you can send a document to a server print queue.

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.

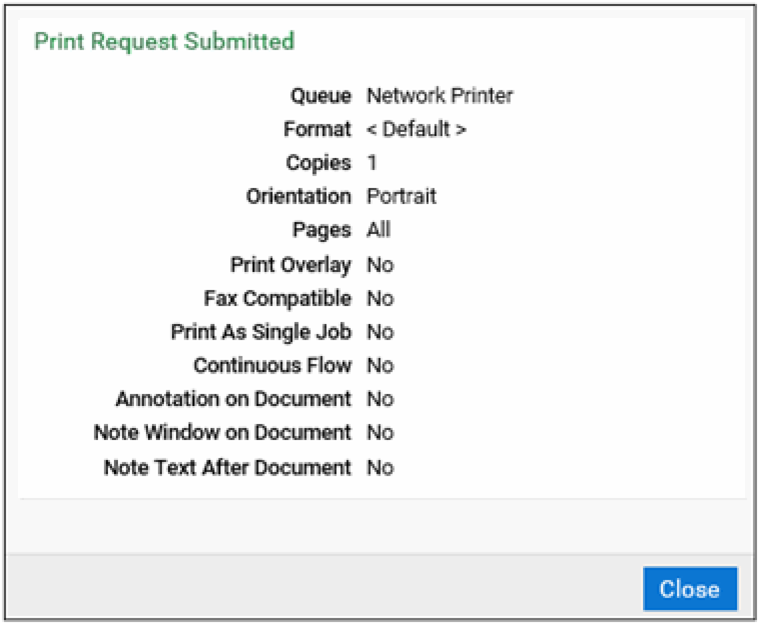
To send documents to a server print queue:

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.

Toolbars in the Document Viewer

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

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

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

Showing or Hiding Toolbars

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

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

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

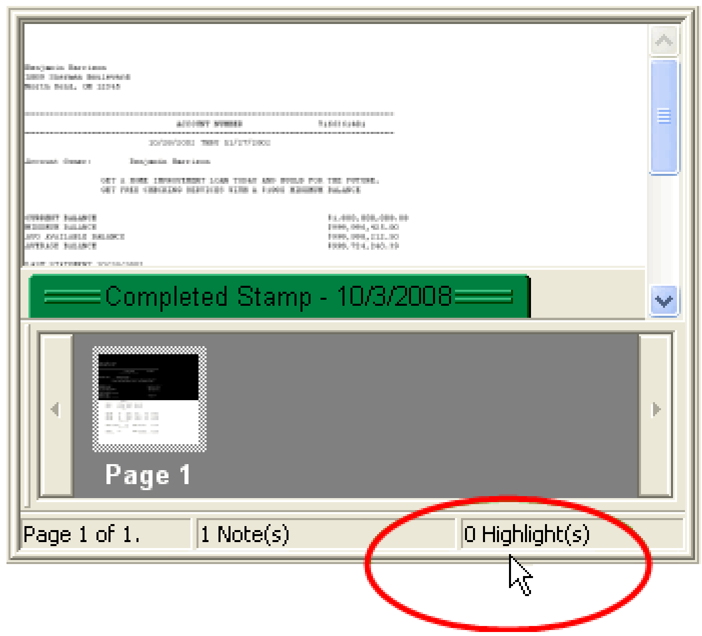
Auto-Hide Toolbars

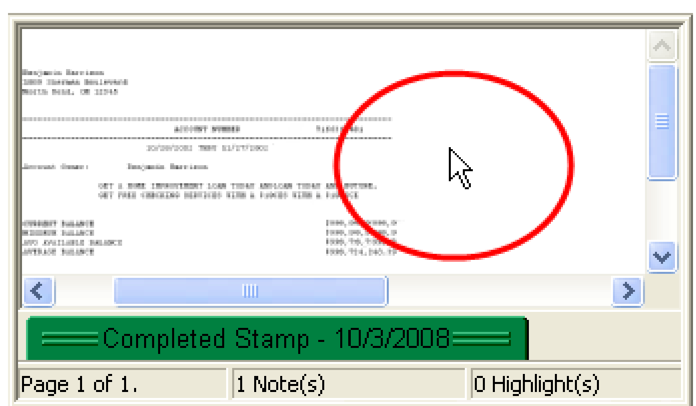
Auto-Hide provides the ability to hide toolbars until you position your pointer over their display area.

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

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

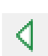
   In the example below, notice the **Pages** toolbar is displayed when the pointer is placed over the **Pages** toolbar display area. The **Pages** toolbar is hidden when the pointer is not over the **Pages** toolbar display area.

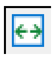
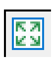
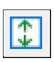
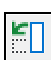
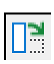
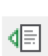
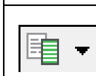




Viewer Control Toolbar

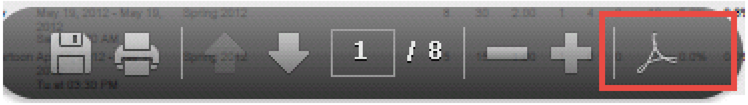
The Viewer Control toolbar allows you to view the document more efficiently. Use the buttons to navigate within the document, resize and reorient the page, and print.

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

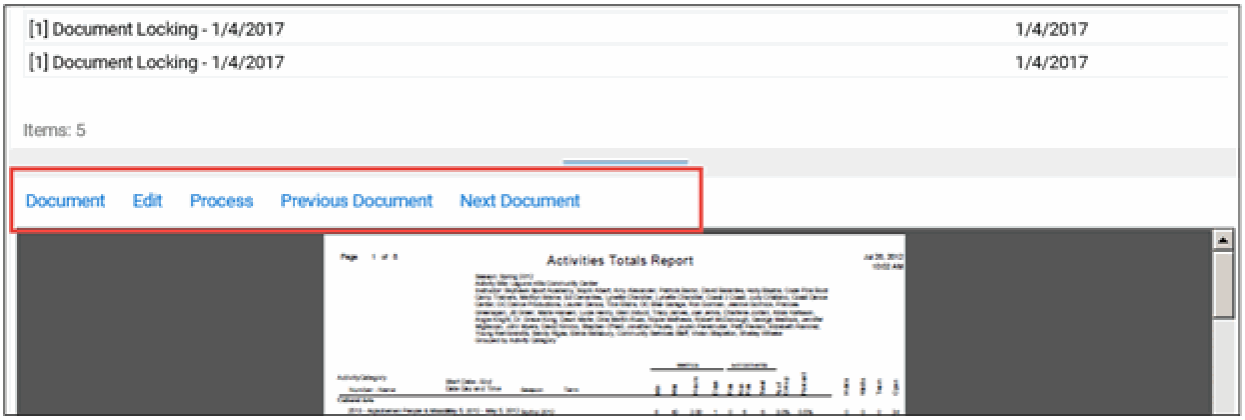
Button	Description
	**Sizing** options allow you to select a standard sizing option. Select a specific percentage of reduction or magnification (25%, 50%, 75%, 100%, or 200%), Fit Width, Fit Height, Fit Window, or True Size. Also displays the current magnification percentage whenever the **Scale | Zoom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

PDF Viewer Toolbar

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



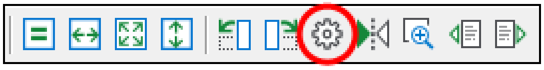
To navigate within the viewer, the following toolbar is displayed:



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

Options Button - OnBase Viewer Options

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



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

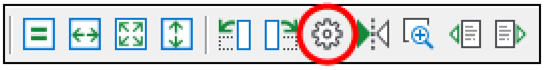
- Thumbnail size
- Thumbnail zoom behavior
- Auto-scroll preferences
- Whether to show icons on a document page for notes and annotations
- Rubberband behavior
- Zoom region preferences
- Blank page display preferences
- Connection timeout preferences

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

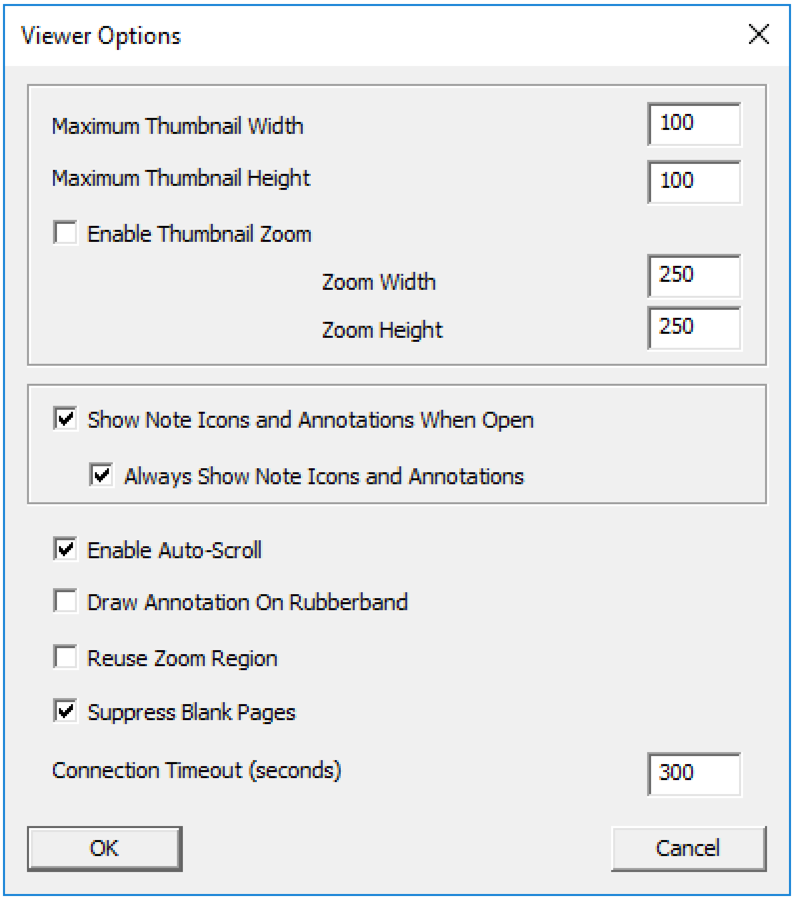
Changing Thumbnail Size

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

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



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



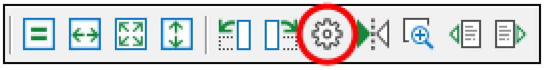
2. In the **Maximum Thumbnail Width** field, type the number of pixels that defines the maximum width for thumbnails. For example, the default setting is **100**, which means that no thumbnail in the **Pages** toolbar will ever be wider than 100 pixels. You can specify any width from 32 pixels through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

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

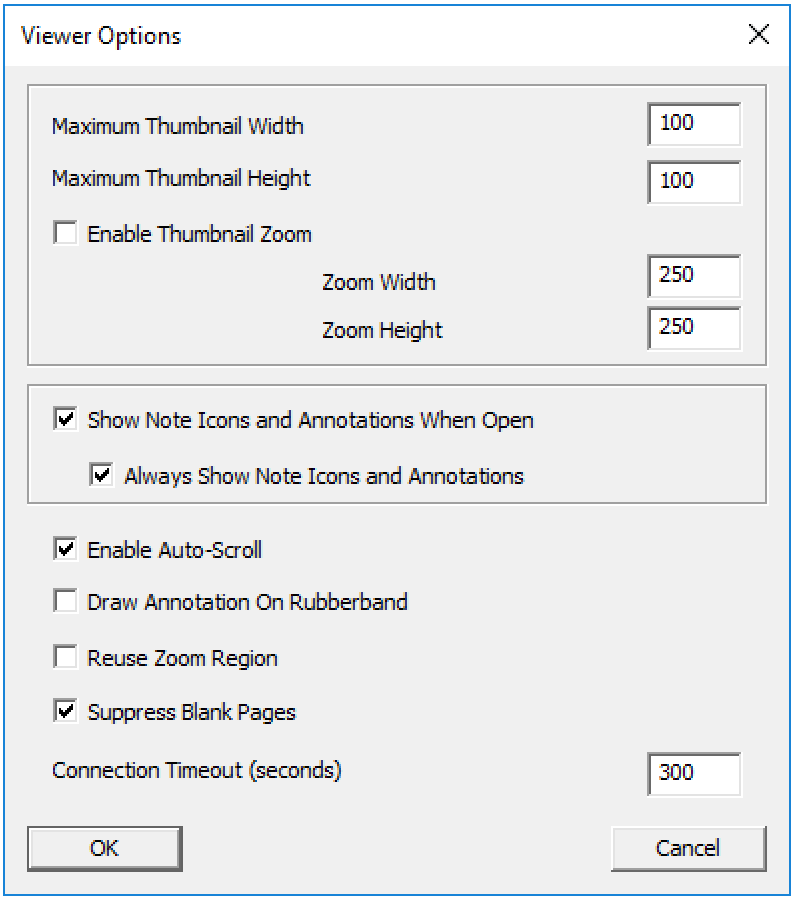
Change Zoomed Thumbnail Size

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

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



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

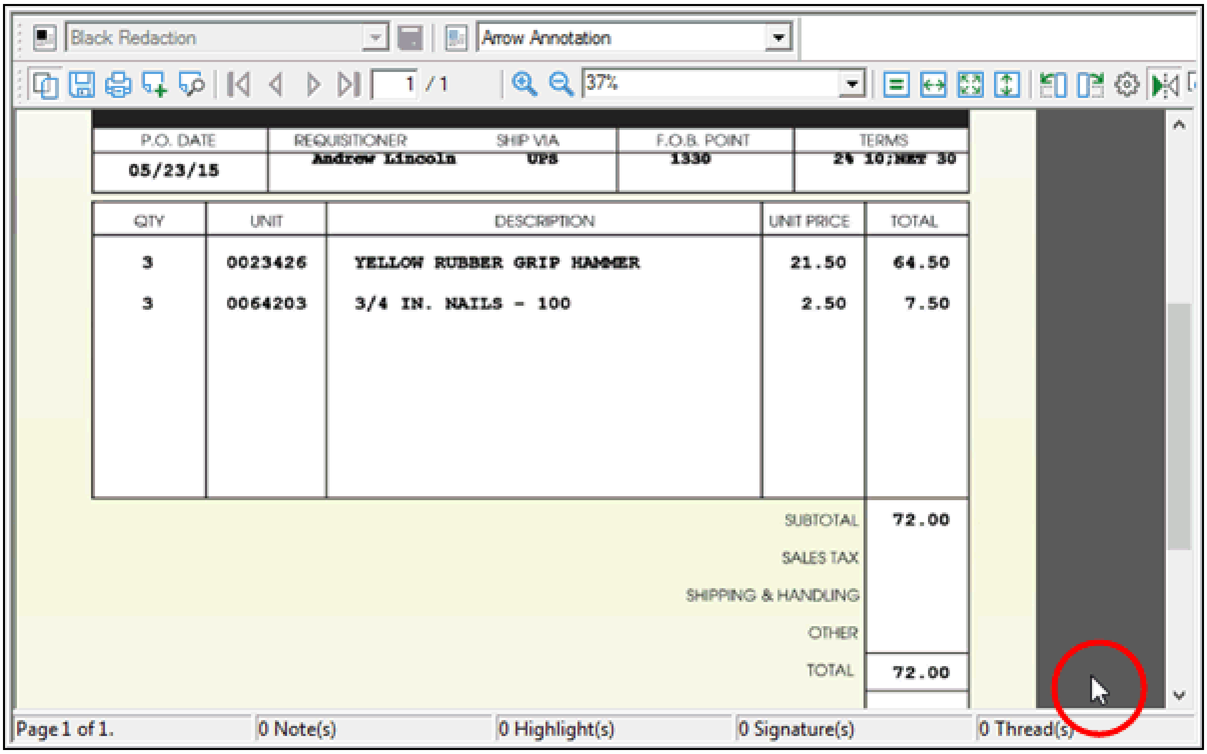


2. Select the **Enable Thumbnail Zoom** check box if you want thumbnails to be magnified to the specified dimensions whenever you place your pointer over them. Clear the check box if you want thumbnails to remain the same size.
3. In the **Zoom Width** field, type the maximum width in pixels of the zoomed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

Enable Auto-Scroll

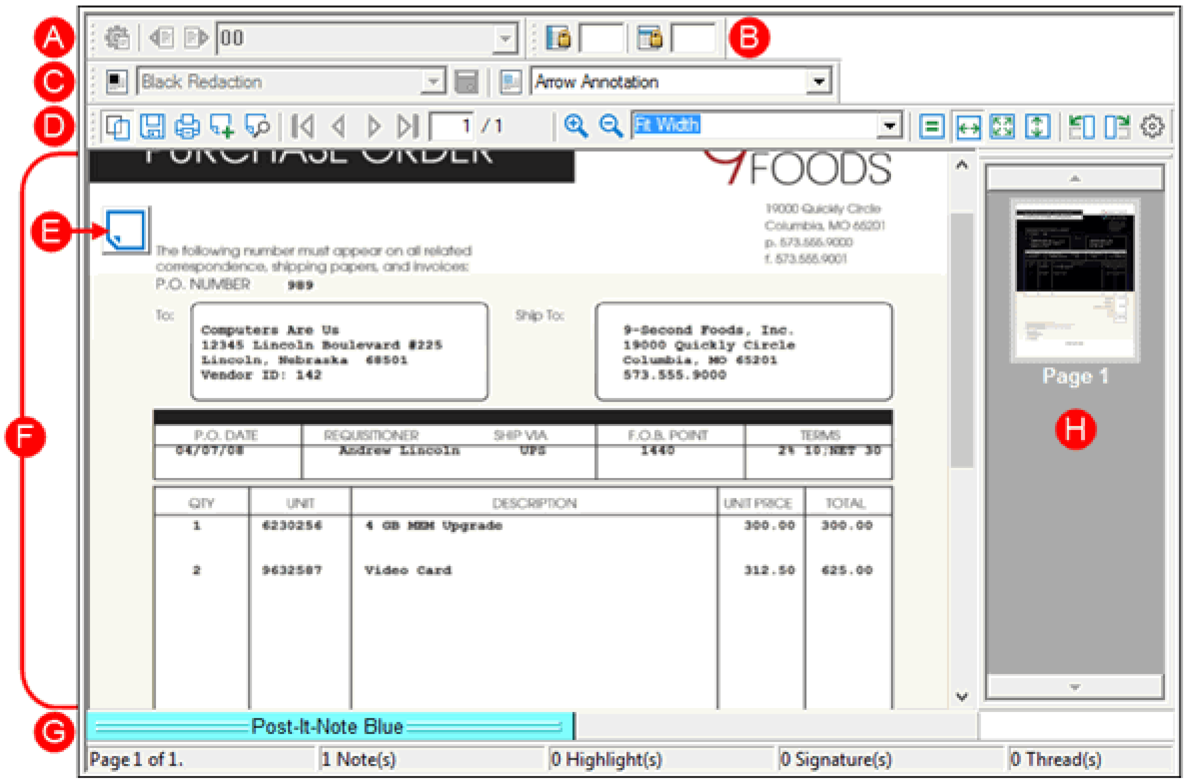
Select this option to enable auto-scrolling on documents. Auto-scrolling allows you to place the pointer at the edge of the viewer and scroll through the document vertically or horizontally. For example, to scroll down, you would place the pointer at the bottom of the viewer.

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



Display Options for Notes and Annotations

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



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

Show Note Icons and Annotations When Open

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

Always Show Note Icons and Annotations

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

Draw Annotation On Rubberband

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

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

Retaining the Zoom Region from Page to Page

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

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

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

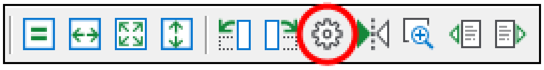
Suppressing Blank Pages

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

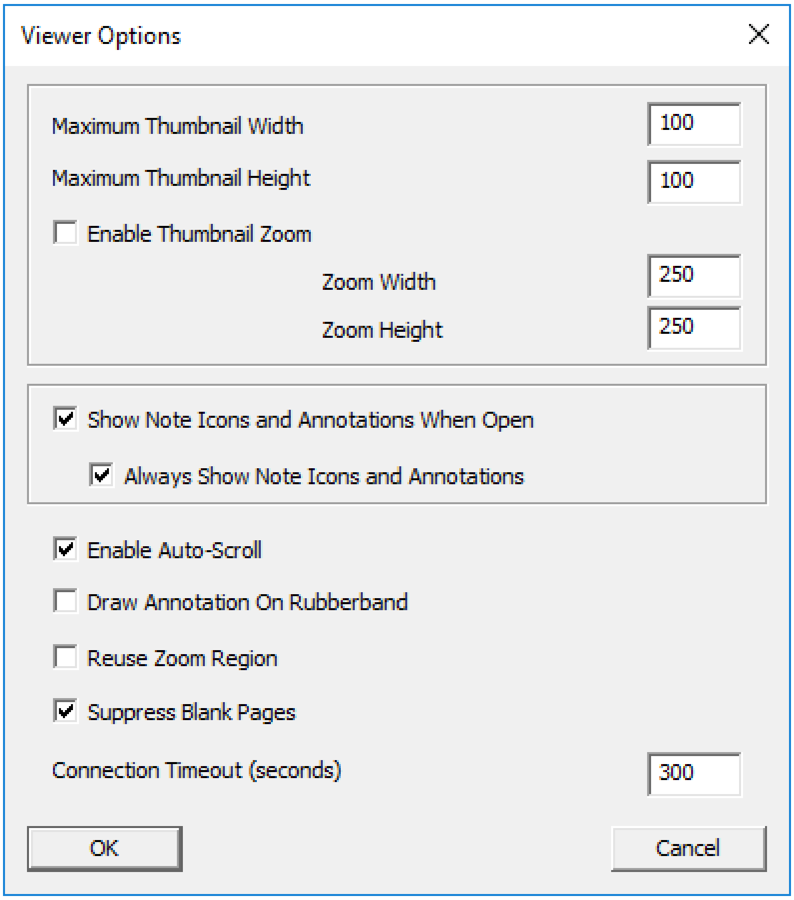
Note: The **Suppress Blank Pages** function is not supported in the ActiveX Web Client.

To suppress blank page thumbnails in the Document Viewer:

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



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

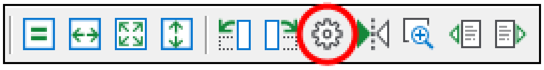


2. Select the **Suppress Blank Pages** check box. Clear the check box if you want the blank pages to remain in the **Pages** toolbar.
3. Click **OK** to save your changes. OnBase immediately changes the display of the thumbnails in the viewer based on whether or not the **Suppress Blank Pages** option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

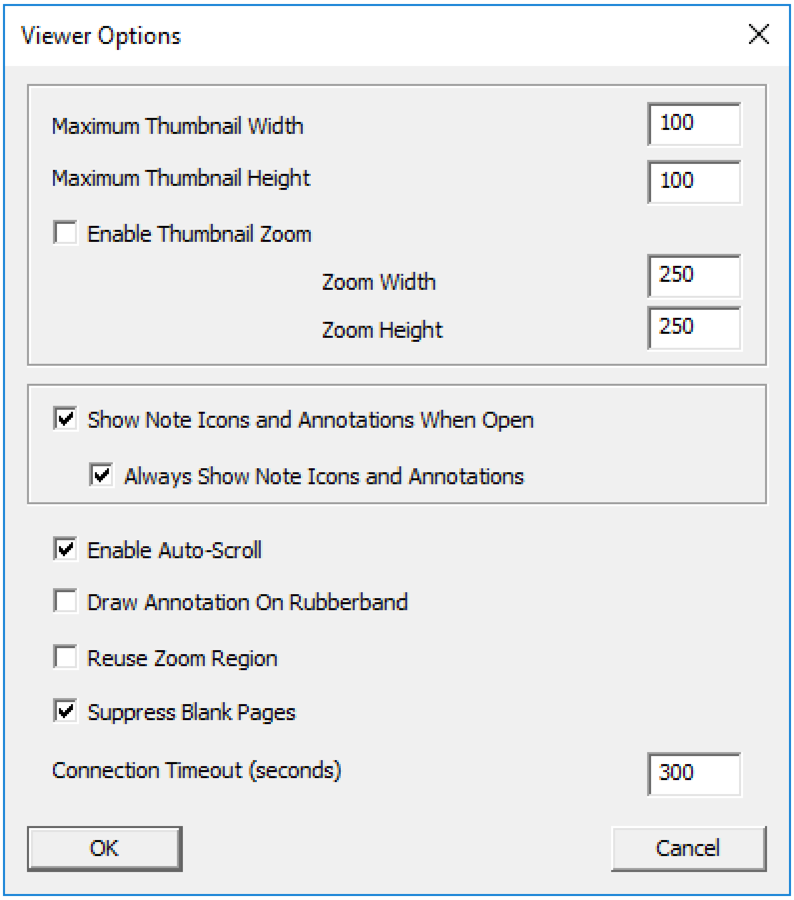
Adjusting Connection Timeout

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

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



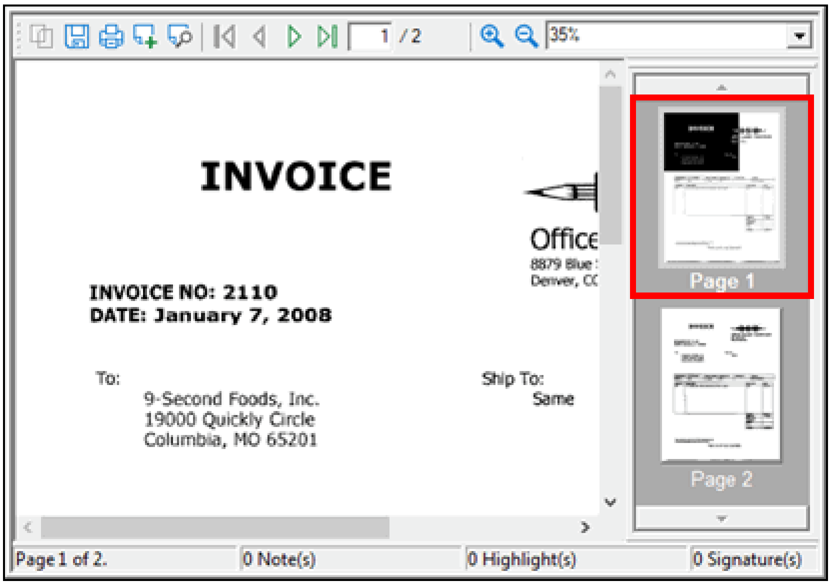
The **Viewer Options** dialog box is displayed.



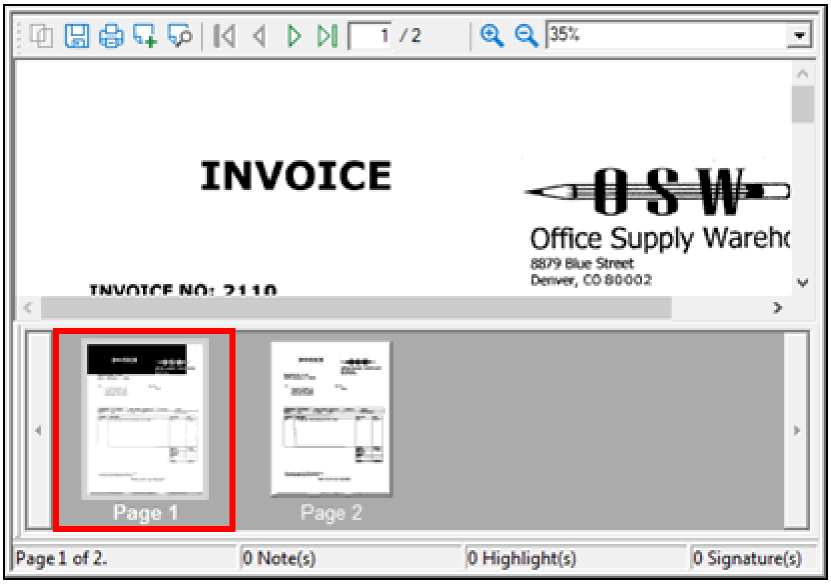
2. In the **Connection Timeout** box, adjust the timeout. The minimum and default setting value is **300** seconds (five minutes).
3. Click **OK** to save your changes.

Pages Toolbar - View Document Thumbnails

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



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



Show or Hide Thumbnails

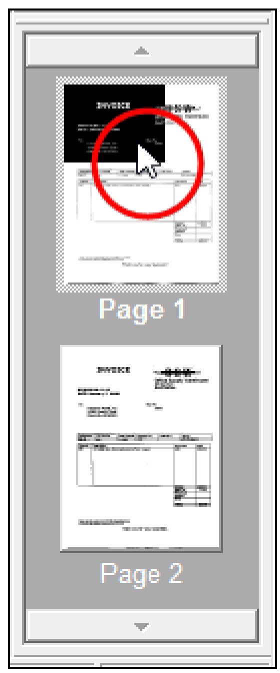
Thumbnails can be displayed or hidden by default. To show or hide thumbnails, right-click anywhere in the Document Viewer and select **Toolbars** | **Pages**. This toggles the thumbnails on or off.

Navigating the Document Using Thumbnails

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

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

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



Zooming Thumbnails

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

Reordering Pages in a Document Using Thumbnails

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

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

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

Adding Pages to a Document Using Thumbnails

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

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

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

To add pages to an image document:

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

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

Deleting Pages from a Document Using Thumbnails

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

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

Internal Text Search Toolbar

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

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

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

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

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

Button	Description
	**Text Search Options** limits your searches to one or more columns (character positions) or to a column index (a predefined text block). You can also specify whether the search should start from the beginning of the document or the current page. For more information, see Limiting Searches Using Text Search Options on page 202.
	**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:

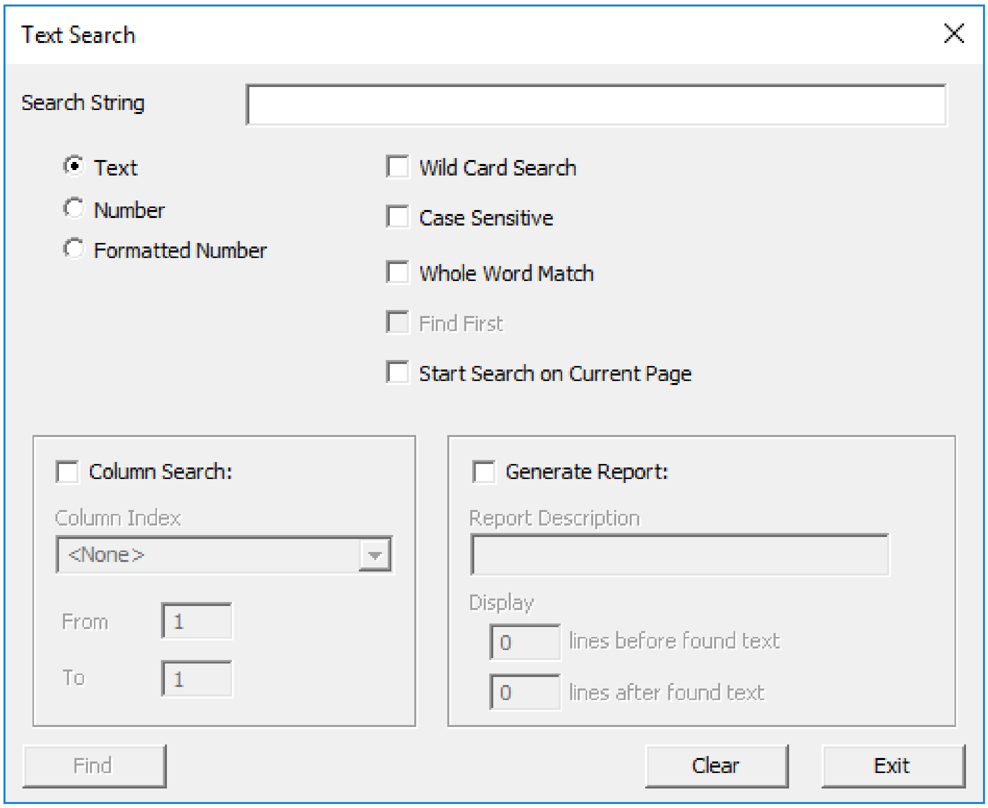
- If you know the string occurs somewhere between the current page and the end of the document, you can apply an option to start the search from the page you are currently viewing.
- If you know that the phrase you're looking for occurs only within a specific set of columns, you can limit the search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

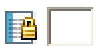
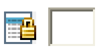
9. Select **Generate Report** to create a report, which is stored under the **SYS - Search Reports** Document Type. Use one or both of the following options:

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.

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.

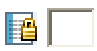
Any locks you specify will be applied to the current document for as long as it remains open. They will be removed as soon as you close it or open another document in the same viewer. If you return to the same document later, even in the current session, the columns or rows will be unlocked.

Using the Column/Row Locking Toolbar

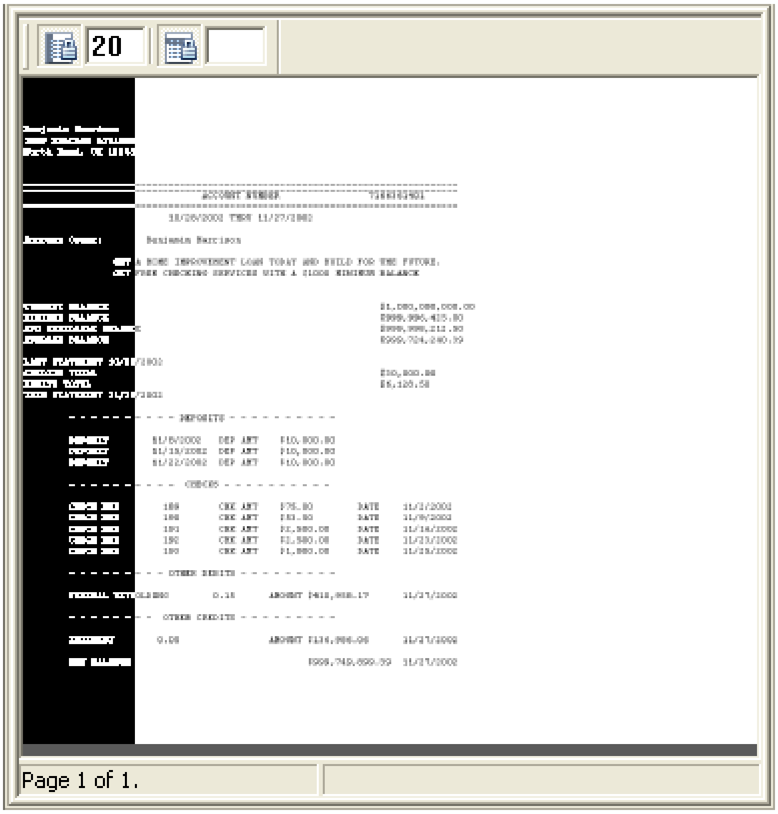
This toolbar is available for text report formatted documents. The Column/Row Locking toolbar allows you to lock the position of the specified number of columns and/or rows of text.

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.

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.

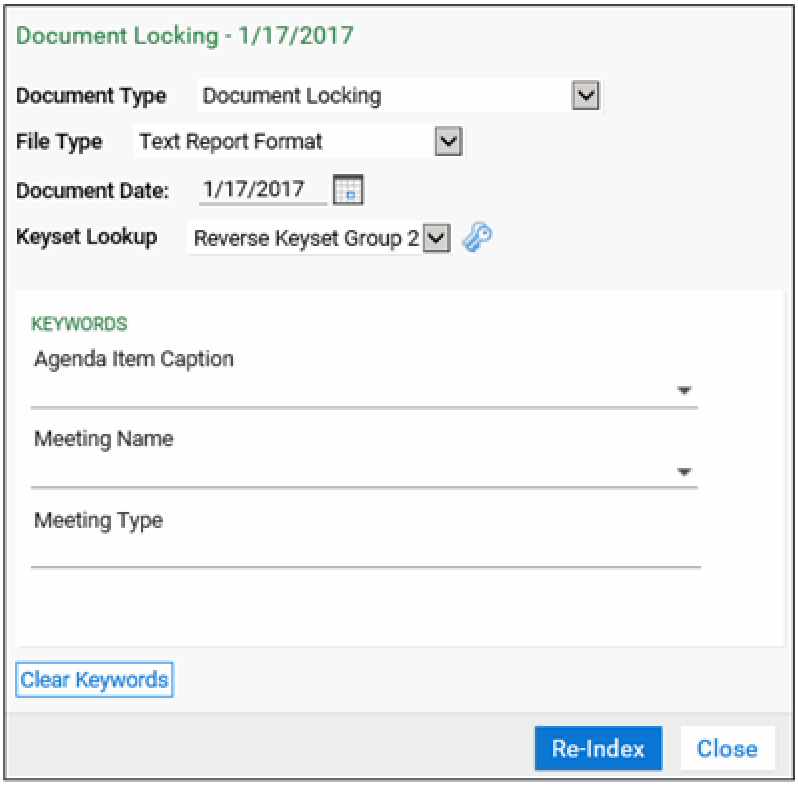
Re-Indexing Documents

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 213.

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 213.

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 209, 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.

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.

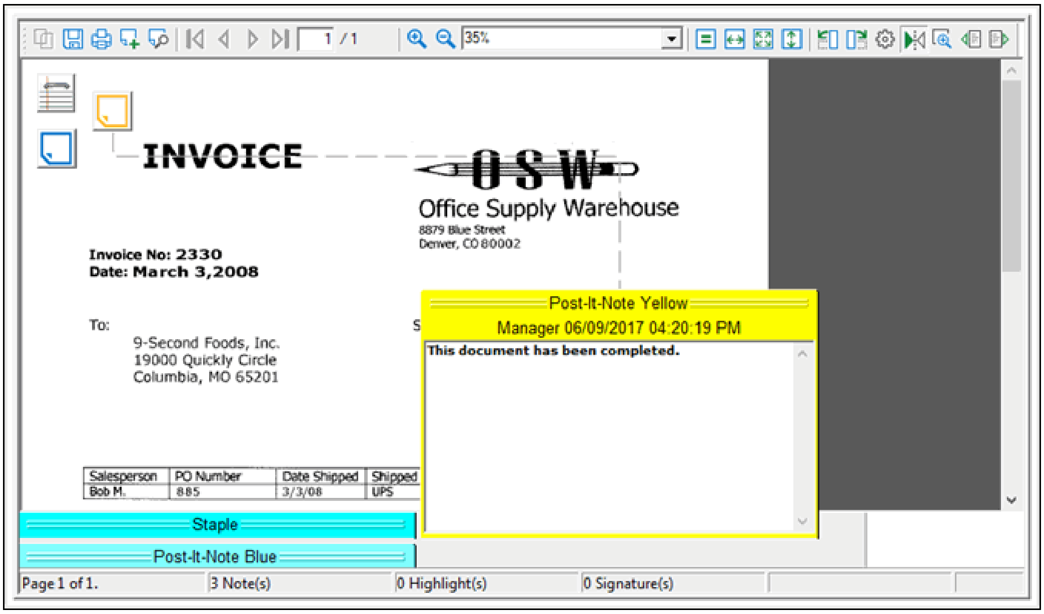
Note: You can view notes on an OLE document (such as a Microsoft Office document or PDF) in the **Notes** pane in the Document Viewer. See Notes Pane Viewer for OLE Documents on page 237. To add, edit, or delete notes on an OLE document, you must use the **Notes** dialog box. See Notes Dialog Box on page 227.

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:

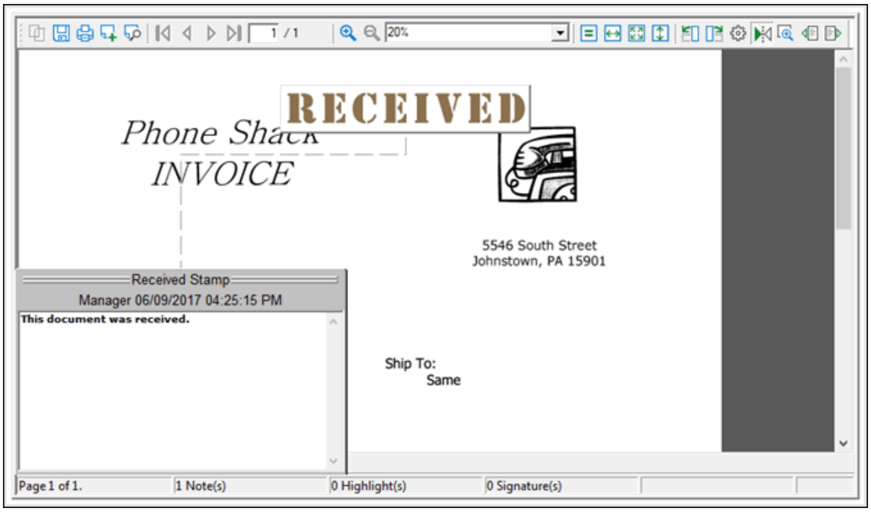
- Some notes may be configured to hide by default. To view any hidden notes, you can display a list of all notes on the document and open any notes from the list.
- Depending on your system setup and user privileges, you may be able to view, modify, delete or add notes to a Document Type, as well as 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

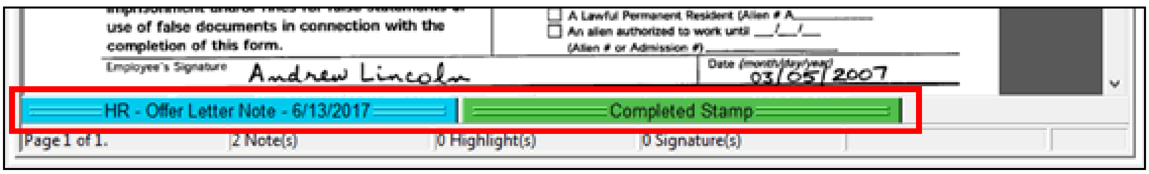
The **Options** button on the Viewer Control toolbar allows you to choose whether note icons and annotations are displayed while you're viewing a document.

Notes Toolbar

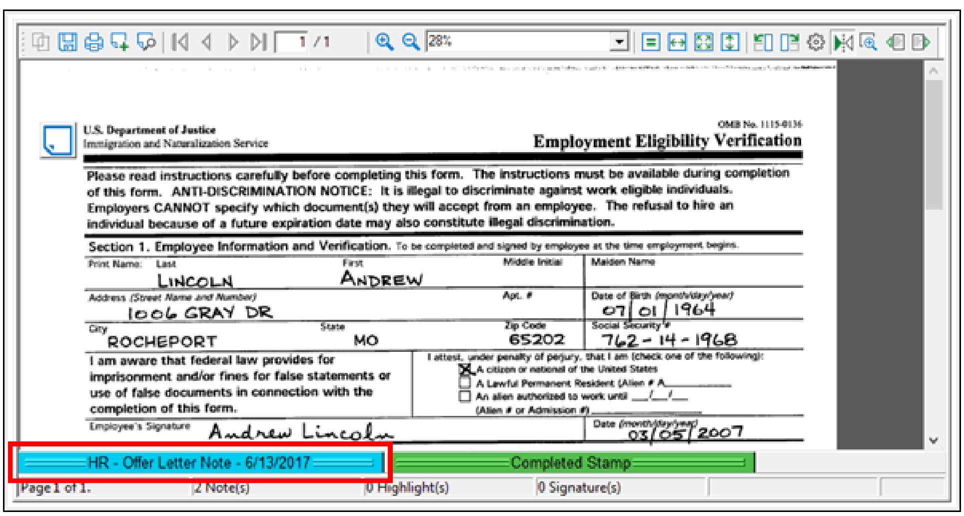
The **Notes** toolbar is a row of tabs representing notes and annotations on the current page. The toolbar is displayed along the bottom of the Document Viewer. You cannot undock and move this toolbar to another location.

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

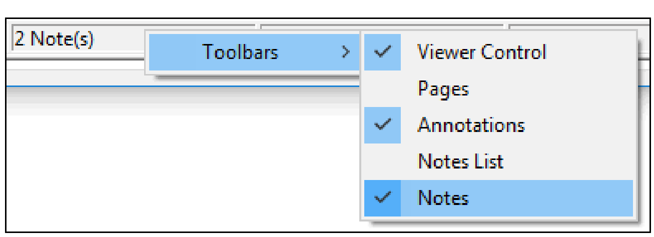
Note: If you are viewing a document that is locked by Records Management, you cannot create or modify notes.



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.

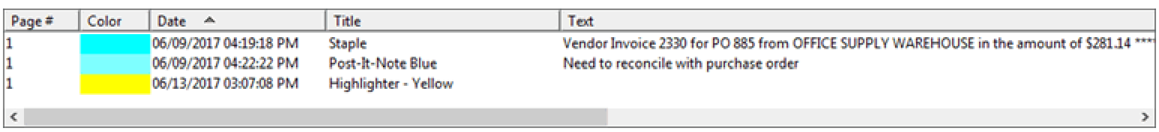


Note: HTML documents do not have toolbars. When you open an HTML document with one or more notes, OnBase displays the associated icon(s). Double-clicking an icon opens the note and displays its text. This action works only from HTML documents or from documents viewed in the HTML Web Client. Double-clicking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

Notes List Toolbar

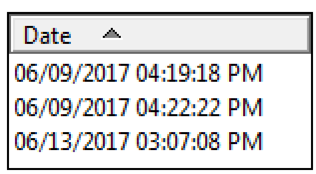
The **Notes List** toolbar displays all notes and annotations attached to a document in a list format. It tells the user the page on which the note is found, the note color, the date the note was created, the note type, and any text included within the note.

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

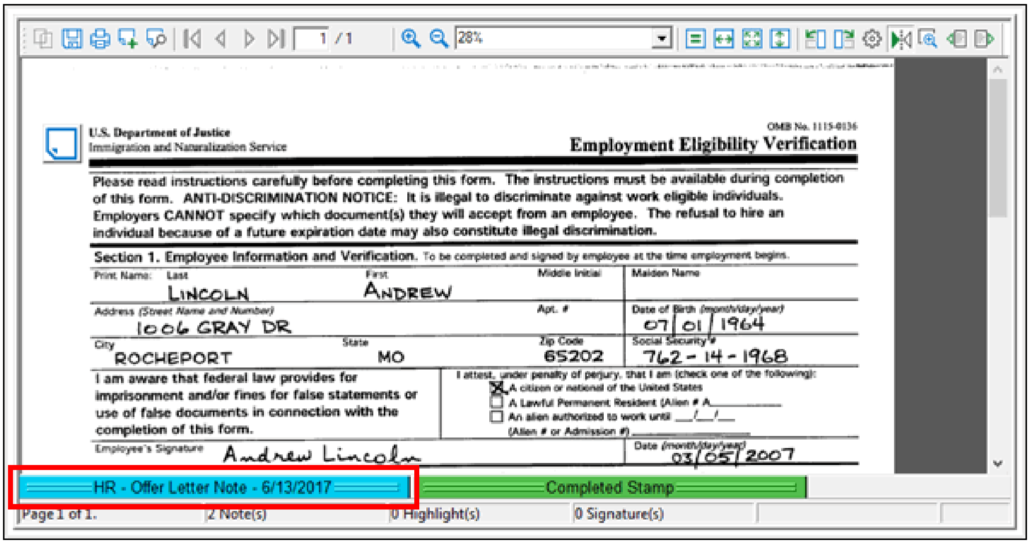
Users with the appropriate viewing rights will see most notes and annotations displayed on the document or displayed as tabs in the Notes toolbar at the bottom of the document.

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.

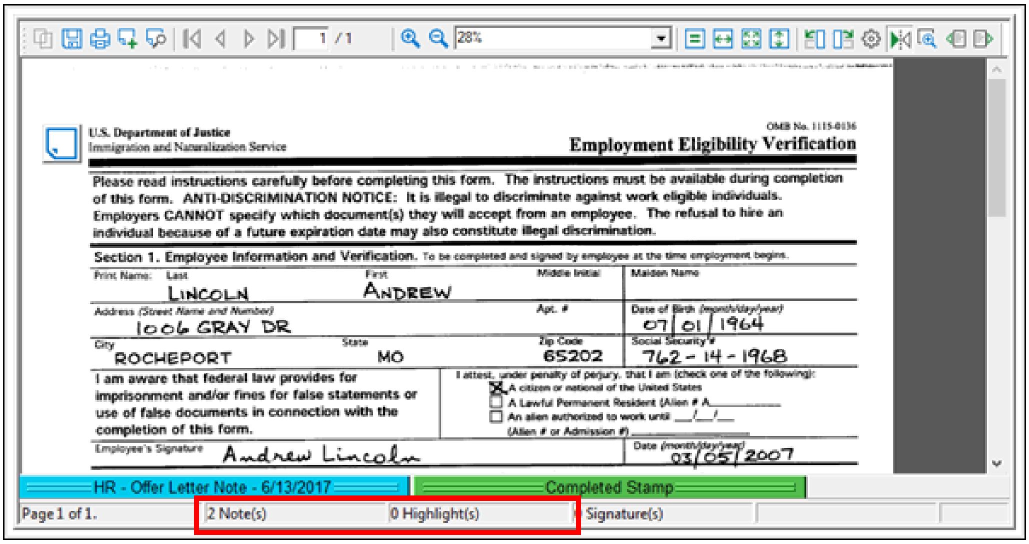
Viewing Notes

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

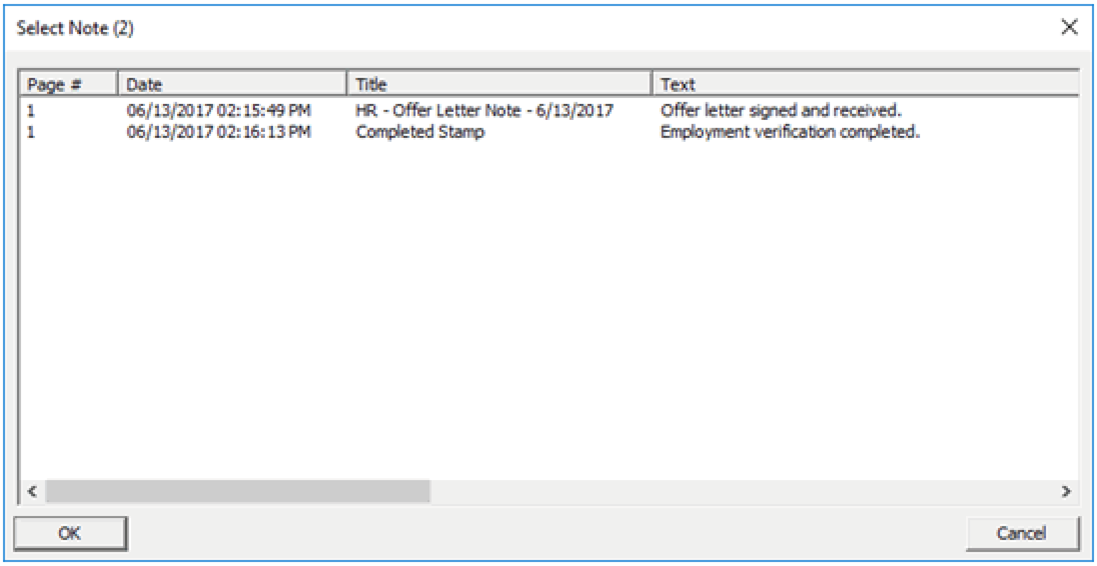
- Double-click the note's icon from the Document Viewer.
- Click the **View Notes** toolbar icon (ActiveX viewer only).
- Click the note's tab displayed in the **Notes** toolbar (ActiveX viewer only).



- 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 223.
- Annotations are created using the Annotations toolbar. To add an annotation to a document, see the procedure for creating annotations.

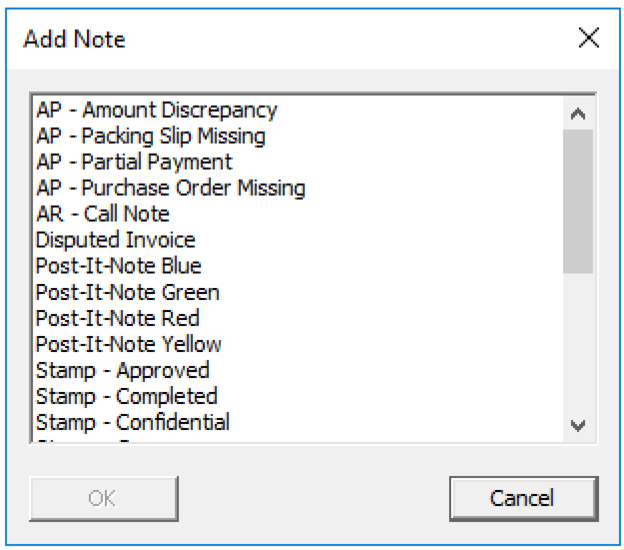
Add a Note to a Document

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

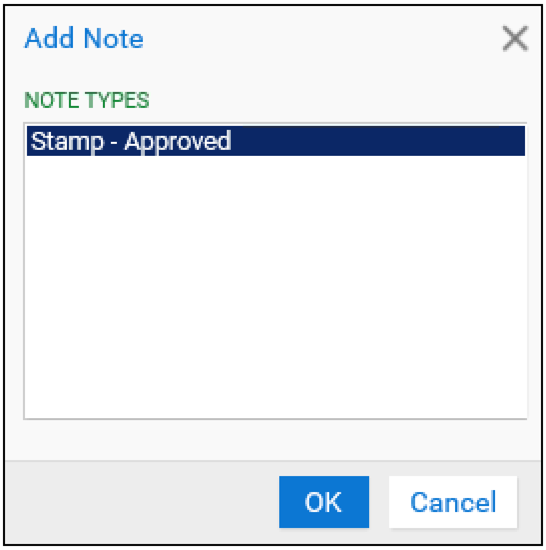
The following steps describe how to add notes to HTML documents and E-Forms and how to add notes in the HTML Document Viewer.

Note: You cannot add annotations to HTML documents.

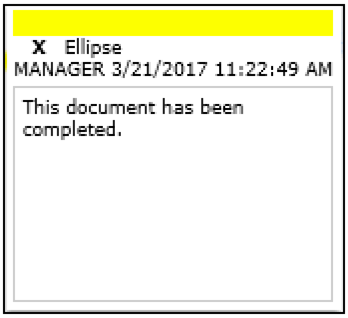
To create a note:

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)

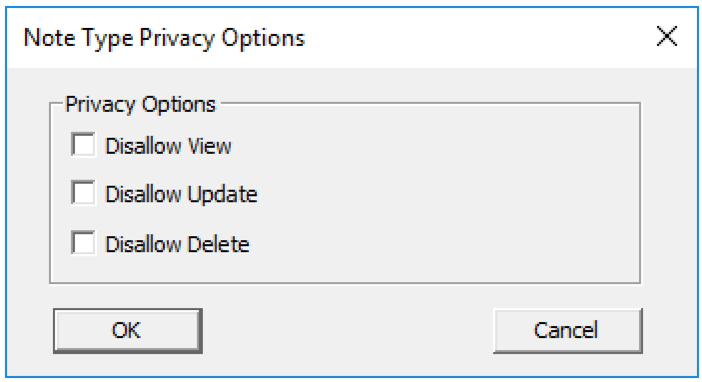
Note: Changes to notes and annotations are saved automatically. Notes that are moved off of the document revert to their last saved position.

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).

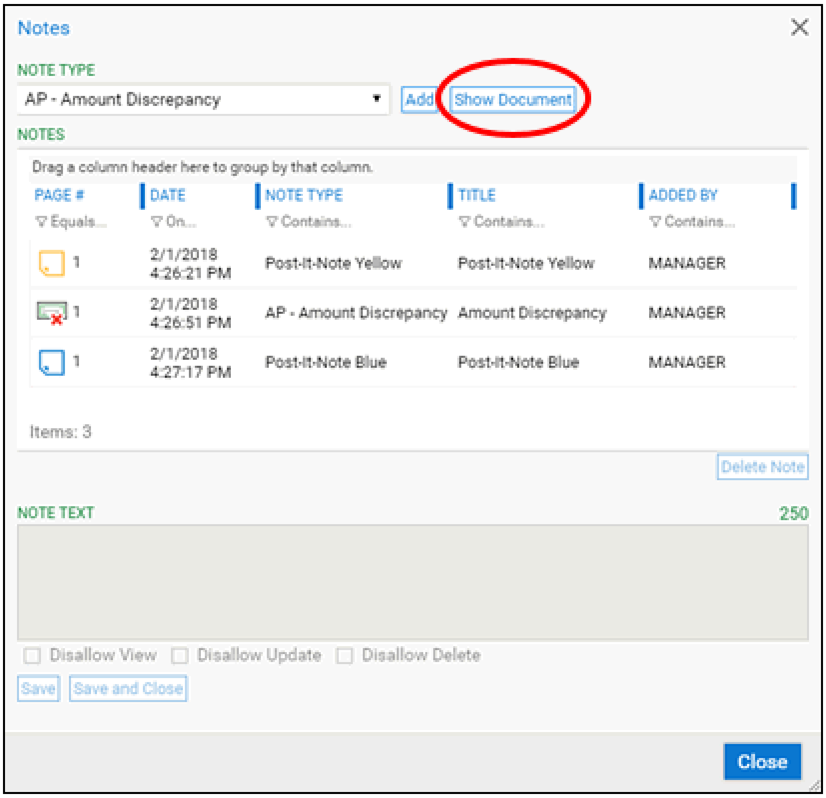
- For OLE documents (such as Microsoft Office documents or PDFs):
  - Select **Edit | Notes** from the OLE viewer menu.
  - Click **Edit** on an open note in the **Notes** pane.
  - Click the **Add Note** button in the **Notes** pane.

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 237 for more information on viewing notes on OLE documents.

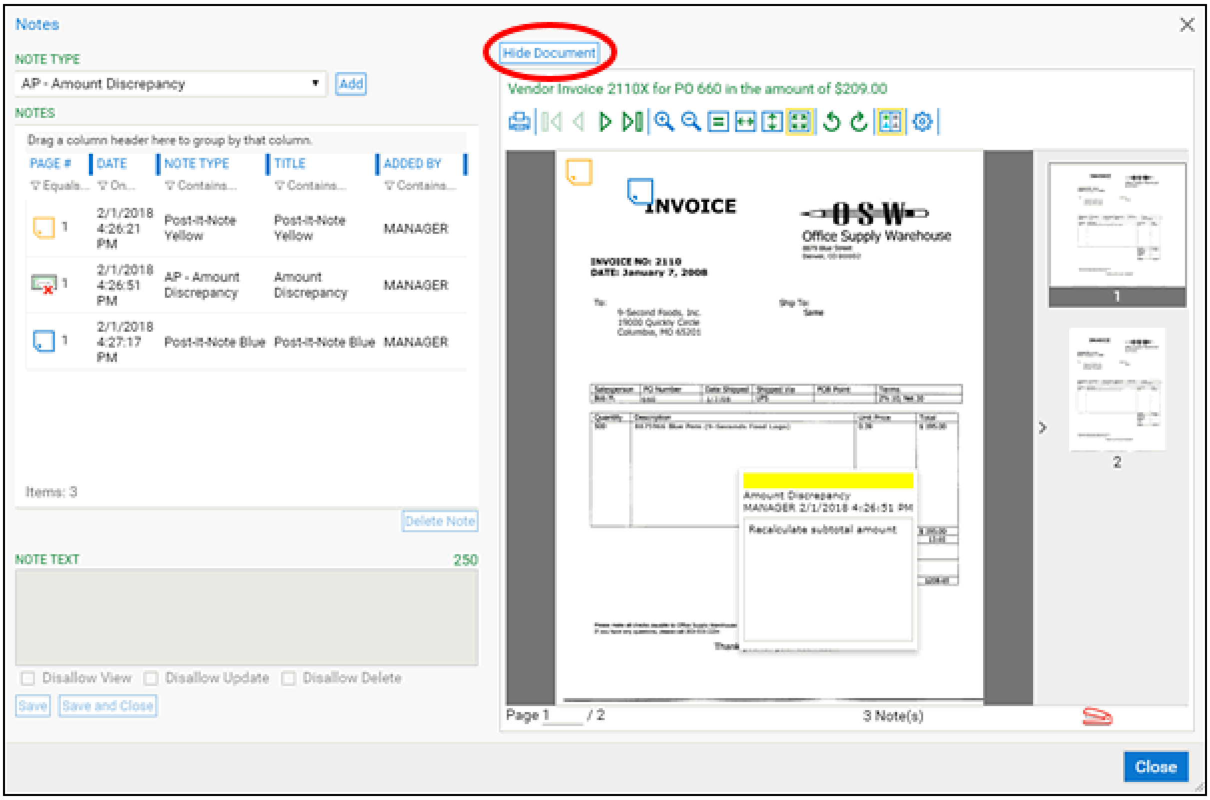
Note: If you have privileges to create a note but do not have privileges to modify it, you can modify the note's text only during the same viewing session that you created the note. After you close the document, the note's text becomes read-only.

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.

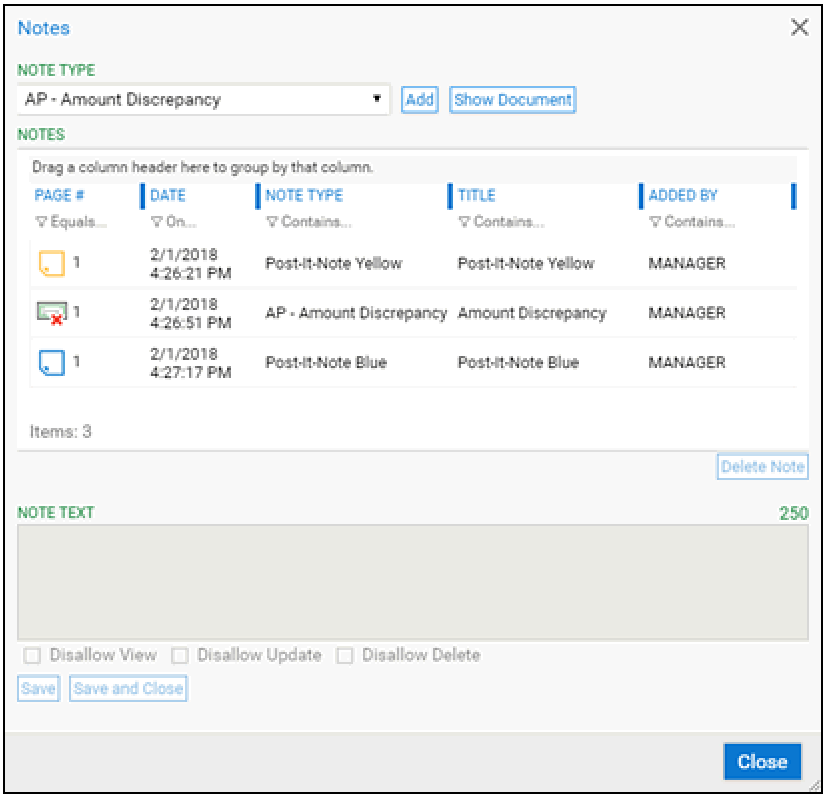
Viewing a Note in the Notes Dialog Box

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

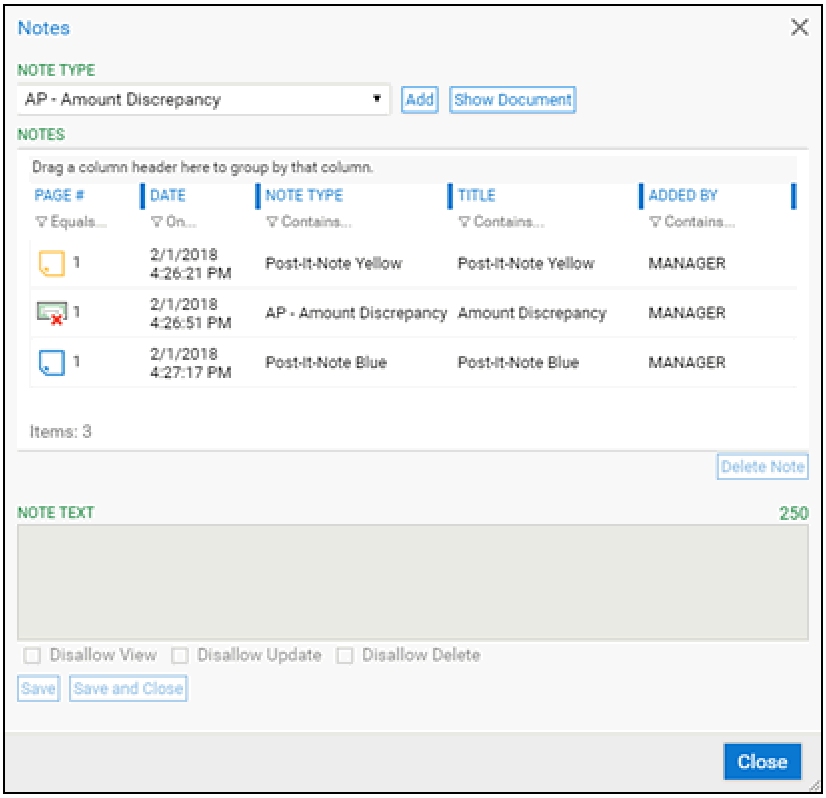
The **Notes** dialog box allows you to add, view, edit, or delete notes on an open document.

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 235.

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.

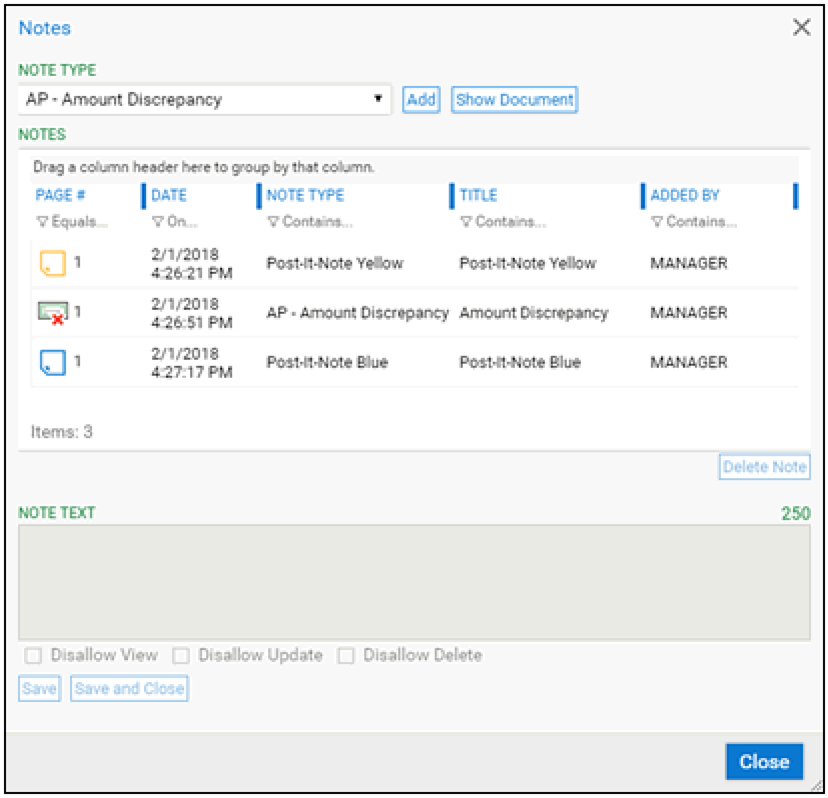
Editing a Note in the Notes Dialog Box

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.

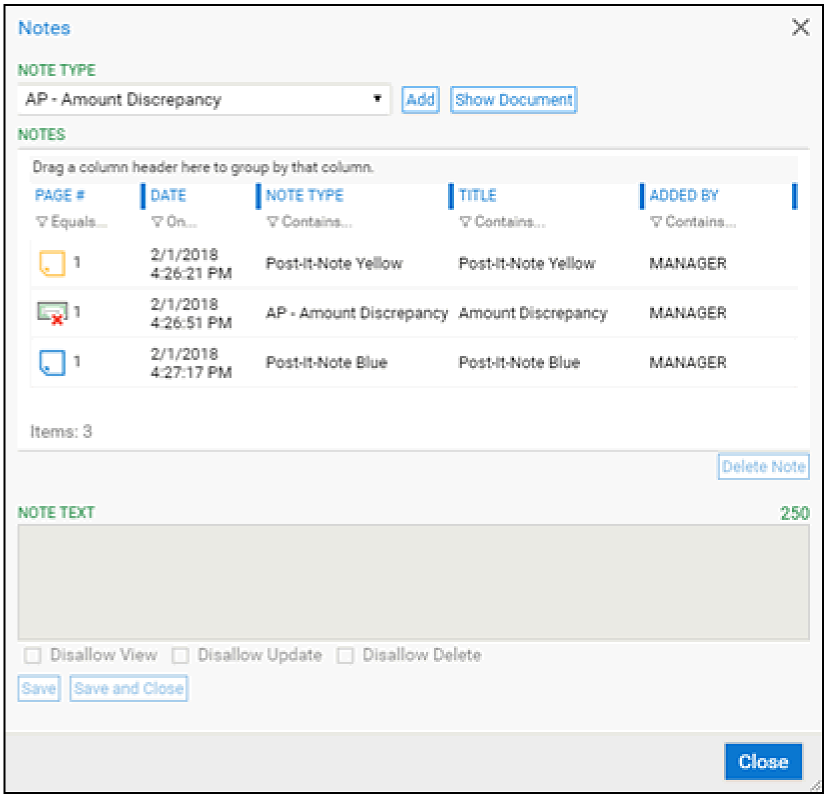
Deleting a Note in the Notes Dialog Box

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:

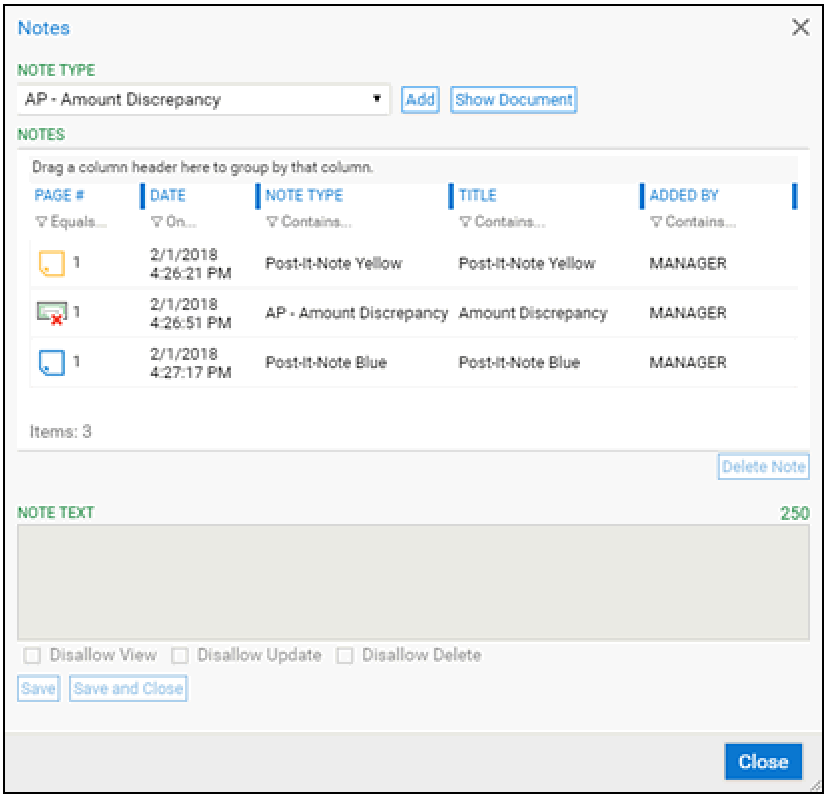
- Users with administrative rights are always able to view, update, and delete all notes and to view and set note privacy options for all notes.
- Only the creator of a note (and any users with administrative rights) can view and set the privacy options of that note.
- If a document is locked, the privacy 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:

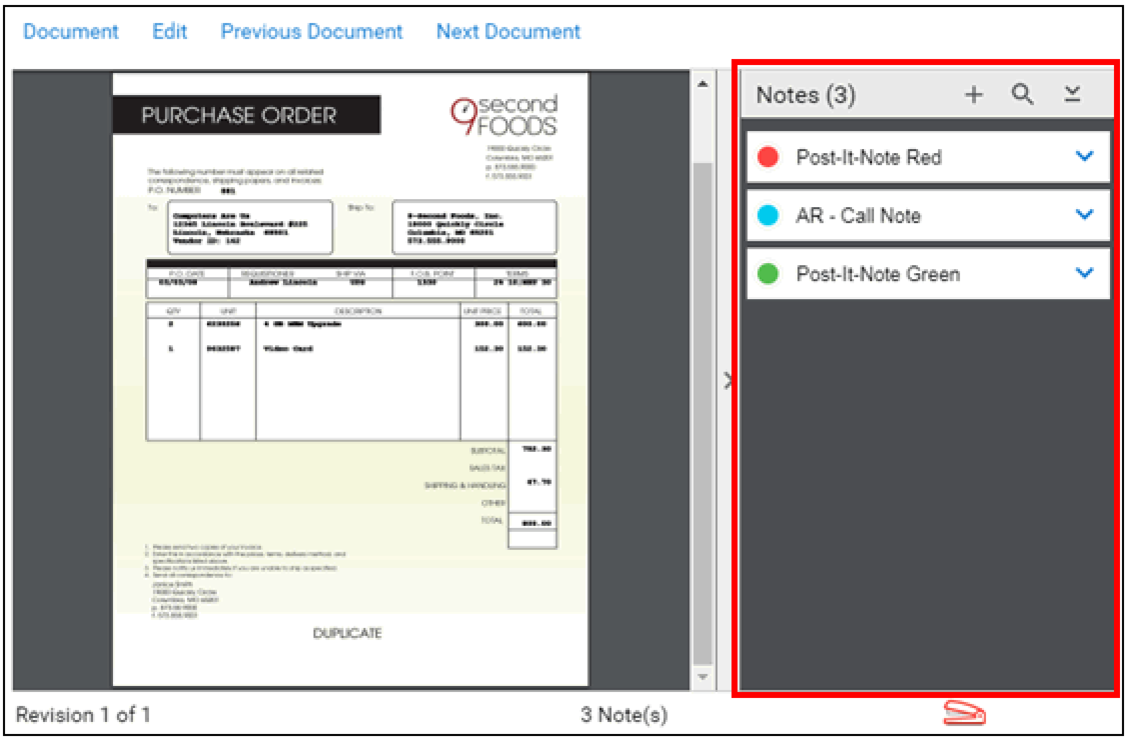
Note Privacy Option	Description
Disallow View	Prohibits all other users from viewing the note. **Note:** If this option is selected, other users can still successfully search for text in the note using the OnBase Client, but they will not be able to view the note.
Disallow Update	Prohibits all other 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).

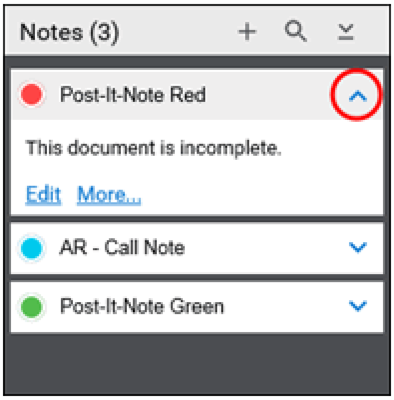
The **Notes** pane displays all of the notes on the document, and each note's color is displayed next to the name of the Note Type. The total number of notes is also displayed in the heading of the pane.



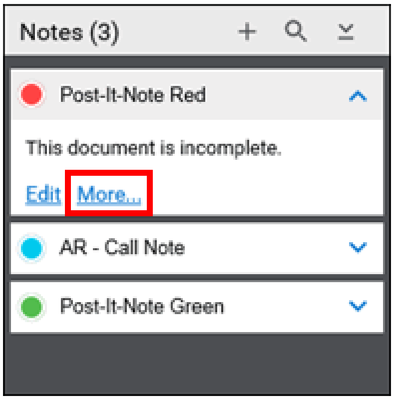
Note: The **Notes** pane only allows you to view the notes on the OLE document. To add, edit, or delete notes, you must use the **Notes** dialog box by clicking **Edit** on a note in the **Notes** pane, or clicking the **Note(s)** section of the status bar. For more information on using the **Notes** dialog box, see Notes Dialog Box on page 227.

The following functions are available in the **Notes** pane of the Document Viewer:

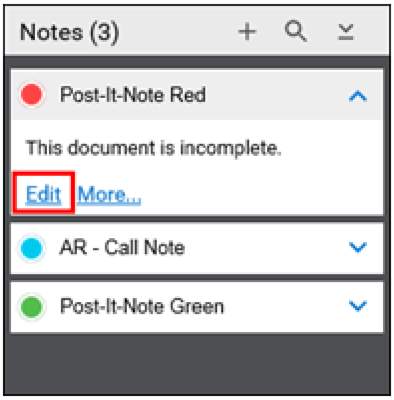
- To expand a note and view its contents, click the note in the **Notes** pane. Click the heading of the note again to collapse the note.



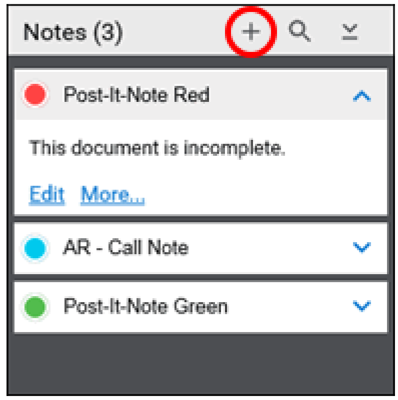
- To view additional information on a note, expand it and then click **More**. The note's icon, creation date and time, and creator's user name are displayed.



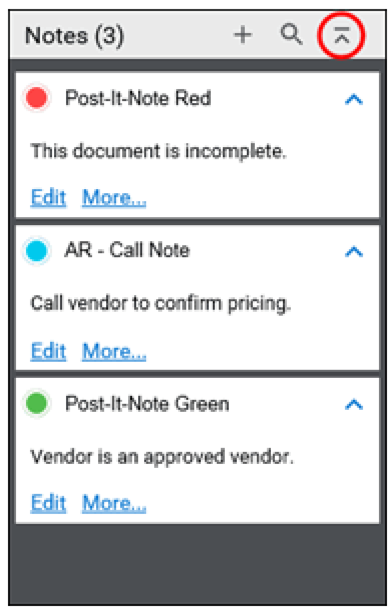
- To edit a note, expand the note and click **Edit**. The **Notes** dialog box is displayed, which allows you to edit the note.



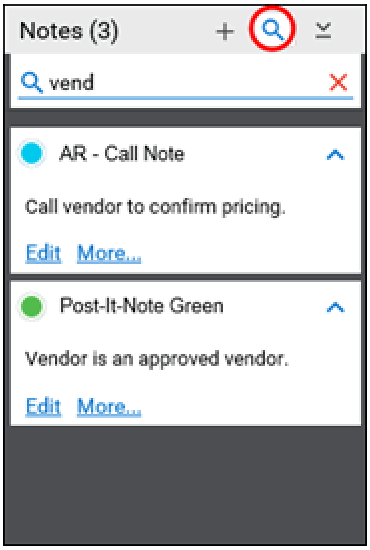
- To add a new note, click the **Add Note** button at the top of the **Notes** pane. The **Notes** dialog box is displayed, which allows you to create a new note.



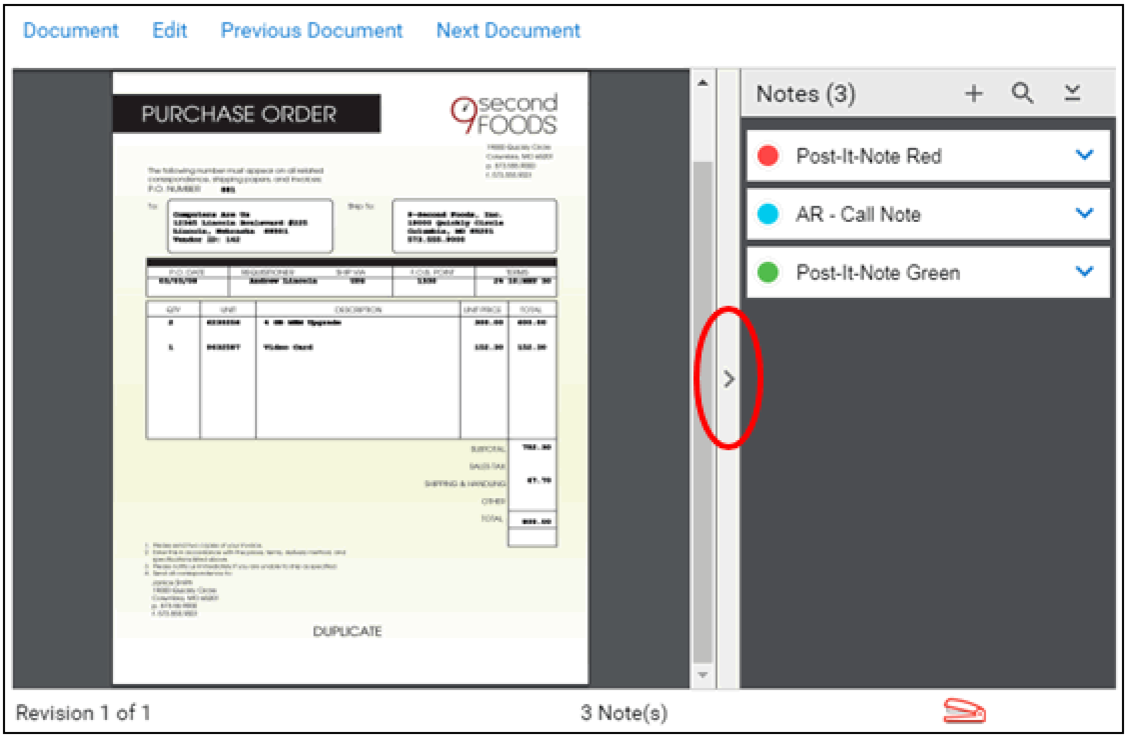
- To expand all notes, click the **Expand All** button at the top of the **Notes** pane. Click the button again to collapse all notes.



- 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.

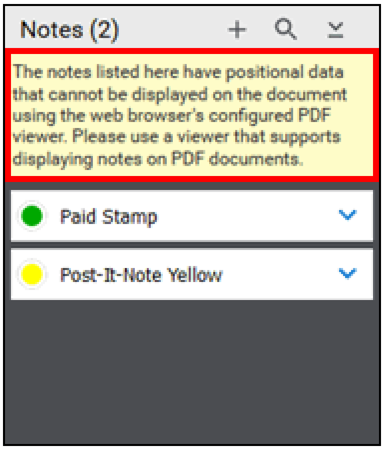


- To hide the **Notes** pane, click the handle next to the pane.



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 243.

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.

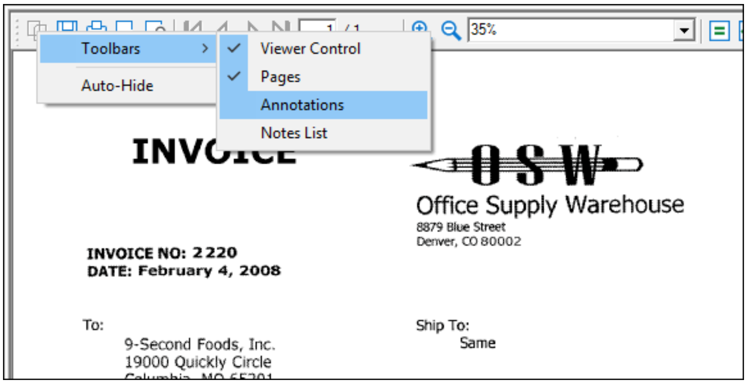
Creating an Annotation

If you have sufficient privileges, you can create annotations on text and image documents using the Annotations toolbar.

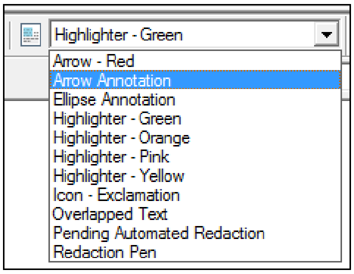
Annotation behavior differs slightly in the HTML Web Client. For more information about working with annotations in these cases, See Creating Annotations in the HTML Document Viewer on page 245.

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 248.

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 226.

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.

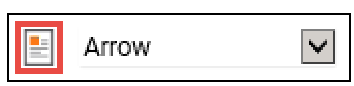
Creating Annotations in the HTML Document Viewer

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.

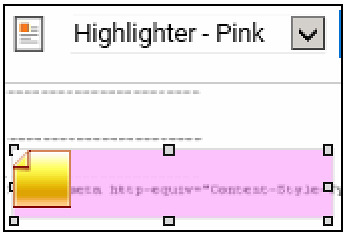
To move an annotation on a document, do one of the following:

- 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:

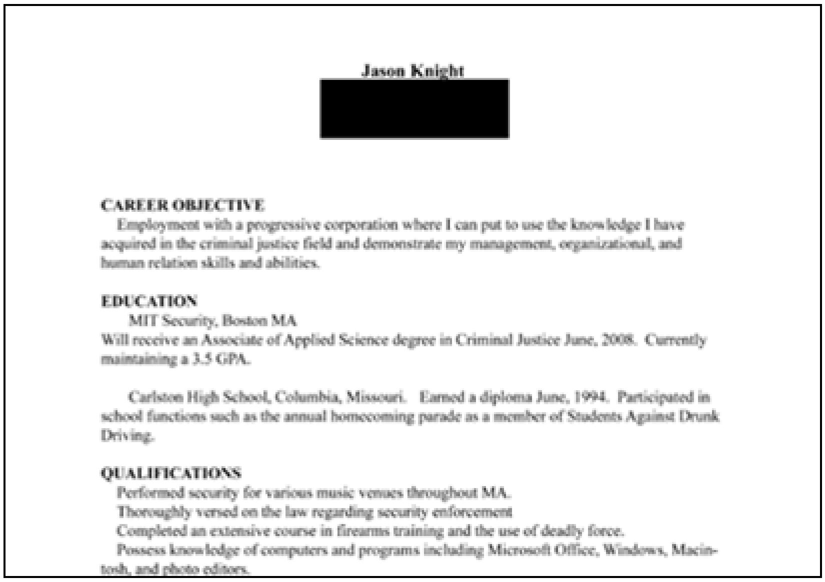
1. In the Document Viewer, double-click the annotation you want to resize. The annotation is selected.



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.

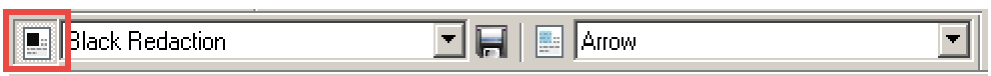
Creating a Redaction

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 250.

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.

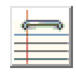
Note: The initial document cannot be an OLE document or E-Form. To staple an OLE document or E-Form to another document, see Stapling Documents with the Stapler Icon on page 250.

2. Open the secondary document(s) that you want to staple to the initial document.

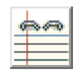
Note: To staple documents, you must have both images open in separate Document Viewer windows. If you are working with documents in the Web Client, you can right-click a document from a Document Search Results list and select **Open in New Window**.

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.



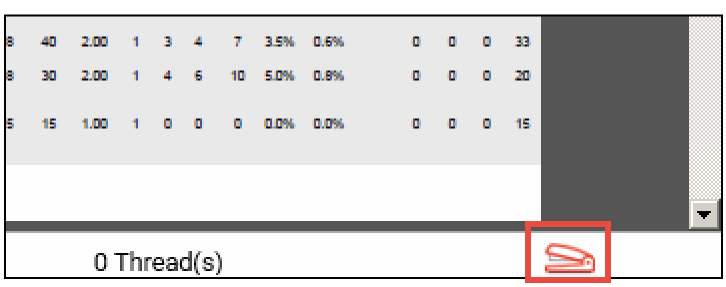
Stapling Documents with the Stapler Icon

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.



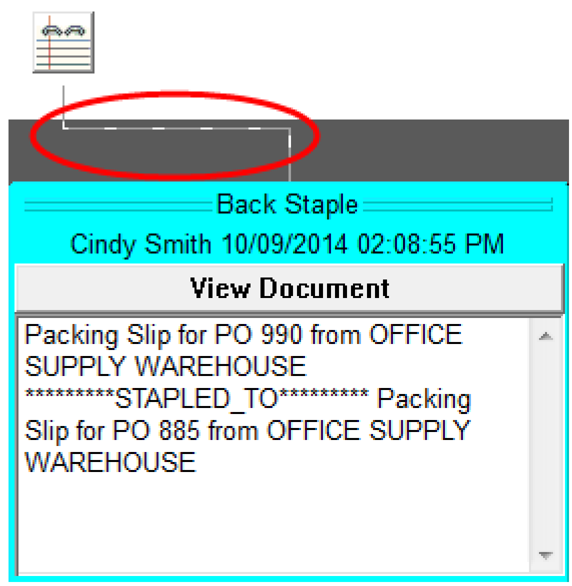
   An icon indicating that the document has been stapled is displayed on all associated documents.

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.

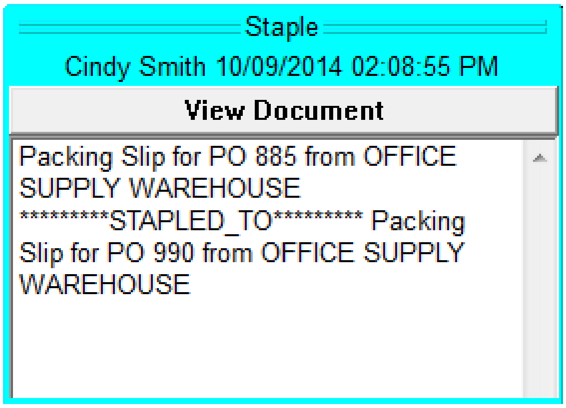
Note: Note labels may vary depending on the Auto-Naming conventions for your system.

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.