OnBase®

Foundation EP5

Collaboration

Reference Guide

Includes:

Installation Guide

Administration Guide

User Guide

Foundation EP5

Copyright

Document Name .... Collaboration

Department/Group .... Documentation

Revision Number .... Foundation EP5

ADMINISTRATION GUIDE

CONFIGURATION

CONFIGURING THE DISTRIBUTION SERVICE

COLLABORATION BEST PRACTICES

USER GUIDE

USAGE

USAGE - WEB CLIENT

USAGE - CLIENT

USAGE - UNITY CLIENT

Overview

The Collaboration module provides the ability to use OnBase as a mechanism for Collaboration on projects using discussions, documents and WorkView objects (with proper WorkView licensing).

The benefit of the Web Client Collaboration module is that it provides the ability for remote teams to collaborate on projects using Workspaces or Threads attached to OnBase documents.

The Collaboration module contains the following basic components:

- Discussion Objects
- Workspaces
- Email Notifications

Discussion Objects

Discussion Objects consist of Discussion Threads, documents, or WorkView Objects.

A Discussion Thread is a running discussion on a particular topic, initiated by a single user, and composed of posts from users that have rights to the Discussion Thread.

- Discussion Threads can be attached to individual documents, WorkView objects or placed in a workspace as a standalone thread.
- Threaded Discussions can follow a document through Workflow or keep track of a discussion on a WorkView object.
- More than one Discussion Thread can be attached to a document, and users can view the Discussion Thread from the document regardless of from where in OnBase they accessed the document (e.g. Document Search Results list from Document Retrieval, Custom Queries, Folders, Cross-References, etc.).

Workspaces

Workspaces provide the ability to group one or more Discussion Threads, as well as documents and WorkView Objects that are relevant to the discussion in a single location.

- Users can create a workspace and invite other OnBase users into that workspace.
- Documents in a workspace can also contain Discussion Threads that are associated at the document level and are independent of the Workspace.
- Workspace access is by invitation. The creator or administrator of a Workspace invites OnBase users into the space or invites users to be part of a document-based Discussion Thread.

Email Notifications

Email Notifications can be configured to be sent when a new item is posted to a Discussion Thread.

Email Notifications can be configured to be sent when a new item is posted to a Discussion Thread and when a document is added to a Workspace.

Email Notifications will contain the Workspace name in the subject line of the email. If generated on the discussion level, Email Notifications will contain the thread and document name.

If a **Notification URL** has been configured, users with external email address configured will receive a link to the discussion in their notification email.

Licensing

Beginning in OnBase Foundation EP5, new customers must use simplified licensing to access Collaboration functionality. Existing customers upgrading from a version of OnBase prior to OnBase Foundation EP5 can continue to use legacy licensing to access this functionality.

If you are a new customer as of OnBase Foundation EP5 or greater, see Simplified Licensing on page 2.

If you are upgrading from a version of OnBase prior to OnBase Foundation EP5, see Legacy Licensing on page 2.

Simplified Licensing

The Standard User or Premier User license is required.

Additional Licensing

Additional licensing may be required to use WorkView in conjunction with Collaboration. For the licensing requirements of WorkView, see the **WorkView** documentation.

Legacy Licensing

The Collaboration module requires a **Collaboration** license and a valid **Client** license. Depending on how you will use the Collaboration module, you may need one or a combination of the following licenses:

- **Web Server**
- a valid **WorkView** client license
- **EDM Services**

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

OnBase®

Foundation EP5

Collaboration

Installation Guide

Foundation EP5

The Collaboration module is automatically included with the Web Server installation.

In addition, you must configure the Web Server's web.config file for Collaboration, and configure OnBase for notifications.

Installing the Web Server

Refer to the Web Server Admin Guide and the Web Server Install Checklist for details on configuring the Web Server.

Configuring the Web Server's web.config File

The Collaboration module uses the Web Server's web.config file to control specific settings:

- Collaboration Context button
- My Workspaces Control Bar
- Workspace Retrieval Control Bar

To activate any of the above items, ensure that the **enabled** switch is set to **true**. See example below:

```
<OutlookBar>
<ControlDef>
<Context>

 <ContextInfo>
 <name><![CDATA[Collaboration]]></name>
 <displayName><![CDATA[Collaboration]]></displayName>
 <displayOrder>4</displayOrder>
 <icon><![CDATA[CollaborationUp.gif]]></icon>
 <enabled>true</enabled> <!--Turns Collaboration Context Button on-off-->
 </ContextInfo>

 <ControlBar>
 <name><![CDATA[AllWorkspaces]]></name>
 <displayName><![CDATA[My Workspaces]]></displayName>
 <path><![CDATA[./Collaboration/AllWorkspaces.aspx]]></path>
 <icon><![CDATA[AllWorkspaces.gif]]></icon>
 <enabled>true</enabled> <!--Turns AllWorkspaces Control Bar on-off-->
 </ControlBar>
```

```
<ControlBar>
<name><![CDATA[FindWorkspace]]></name>
<displayName><![CDATA[Workspace Retrieval]]></displayName>
<path><![CDATA[./Collaboration/FindWorkspace.aspx]]></path>
<icon><![CDATA[SearchWorkspaces.gif]]></icon>
<enabled>true</enabled> <!--Turns FindWorkspace Control Bar on-off-->
</ControlBar>

</Context>
```

Requirements

The following sections outline requirement information specific to Collaboration in OnBase Foundation EP5.

General Requirements

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

- Supported Desktop Operating Systems (the **OnBase Client** column)
- Microsoft .NET Framework Requirements
- General C++ Requirements
- Server C++ Requirements
- Web Client Hardware Requirements
- Web Client Browser Requirements
- Databases Supported
- Database/File Servers

Installing ActiveX Controls

When ActiveX controls are deployed through the Web browser on a system with UAC enabled, the user is prompted to install each control asking **Do you want to allow the following program to make changes to this computer?**

The prompt is displayed the first time each ActiveX control is needed. Users who are logged on as administrators can click **Yes** to install the specified ActiveX control. Once the control is installed, the user is not prompted again for that control.

If the user is logged on as a standard user rather than an administrator, then an administrator must provide his or her credentials before the control can be installed. To avoid this scenario, deploy the Web ActiveX controls using the Hyland Web ActiveX Controls installer.

Tip: The ActiveX controls can be installed using the Hyland ActiveX Controls installers. See Hyland ActiveX Controls Installers on page 11.

Email Notifications

Ensure that all users receiving notifications have an email address configured in the Configuration module.

To configure an email address for a user:

1. Select **Users | User Names / Passwords**. The **User Names & Passwords** dialog box is displayed.
2. Select the user and click **Settings**.
3. In the **User's Email** field, enter the user's email address.
4. Click **Save**.
5. Click **Close** to exit the **User Names & Passwords** dialog box.

Licensing

See Licensing on page 2 for licensing requirements.

Backup and Recovery

The following sections describe how to backup and recover the OnBase Application Server or Web Server using IIS on Windows Server. For database backup and recovery procedures, see the **System Administration** module reference guide.

Note: Backup and recovery on IIS requires that all IIS configuration settings be backed up and restored. For information about backing up and restoring IIS configuration, see the IIS documentation from Microsoft.

Backup

Server recovery requires a backup of the following files:

File(s)	Default Location
Web.config for the Application Server or Web Server	C:\<Virtual Root>\<OnBase Directory>\
Hyland Services configuration files	C:\inetpub\wwwroot\

File(s)	Default Location
Machine.config for ASP	OnBase 6.4 or earlier: %windir%\Microsoft.NET\Framework\v1.1.4322\CONFIG\ OnBase 7.2 through OnBase 9.2: %windir%\Microsoft.NET\Framework\v2.0.50727\CONFIG\ OnBase 10.0 or later: %windir%\Microsoft.NET\Framework\v4.0.30319\CONFIG\
Application pool settings	See Exporting Application Pool and Virtual Directory Settings on page 7.
Virtual directory settings	See Exporting Application Pool and Virtual Directory Settings on page 7.

Backup these files and settings whenever they are modified.

Exporting Application Pool and Virtual Directory Settings

Backup your IIS configuration settings according to Microsoft's instructions, found in the following Microsoft KB article:

http://support.microsoft.com/kb/954872

Recovery

You can recover the OnBase Application Server or Web Server from backed up files. Before you begin, ensure no instances of the OnBase Client and Configuration modules are open on the server machine.

1. Stop IIS. From a command prompt, type **iisreset -stop** and press **Enter**.
2. Remove the OnBase installation on the server.
   a. If the OnBase server was installed using the installer, you can remove the installation using Add or Remove Programs from the Control Panel.
   b. If the OnBase server was installed manually, you must manually unregister and remove all OnBase files.
3. Ensure all OnBase files in **%windir%\system32** (or **%windir%\SysWow64**, on a 64-bit system) have been removed. These files may create conflicts with the new installation.
4. Run the installer for the latest version of the OnBase Application Server. Use the installer for the version you are recovering to restore that version.
5. From backup, copy or restore the following files to their appropriate locations:

File(s)	Default Location
Web.config for the Application Server or Web Server	C:\<Virtual Root>\<OnBase Directory>\

File(s)	Default Location
Hyland Services configuration files	C:\inetpub\wwwroot\
Machine.config for ASP.NET	OnBase 6.4 or earlier: %windir%\Microsoft.NET\Framework\v1.1.4322\CONFIG\ OnBase 7.2 through OnBase 9.2: %windir%\Microsoft.NET\Framework\v2.0.50727\CONFIG\ OnBase 10.0 or later: %windir%\Microsoft.NET\Framework\v4.0.30319\CONFIG\
Application pool settings	See Restoring the Application Pool and Virtual Directory Settings on page 8.
Virtual directory settings	See Restoring the Application Pool and Virtual Directory Settings on page 8.

6. Start IIS after all files and settings are restored. From a command prompt, type **iisreset -start** and press **Enter**.

   The OnBase server has been restored.

Restoring the Application Pool and Virtual Directory Settings

Restore your IIS configuration settings according to Microsoft's instructions, found in the following Microsoft KB article:

http://support.microsoft.com/kb/954872

Start IIS after all files and settings are restored. From a command prompt, type **iisreset -start** and press **Enter**.

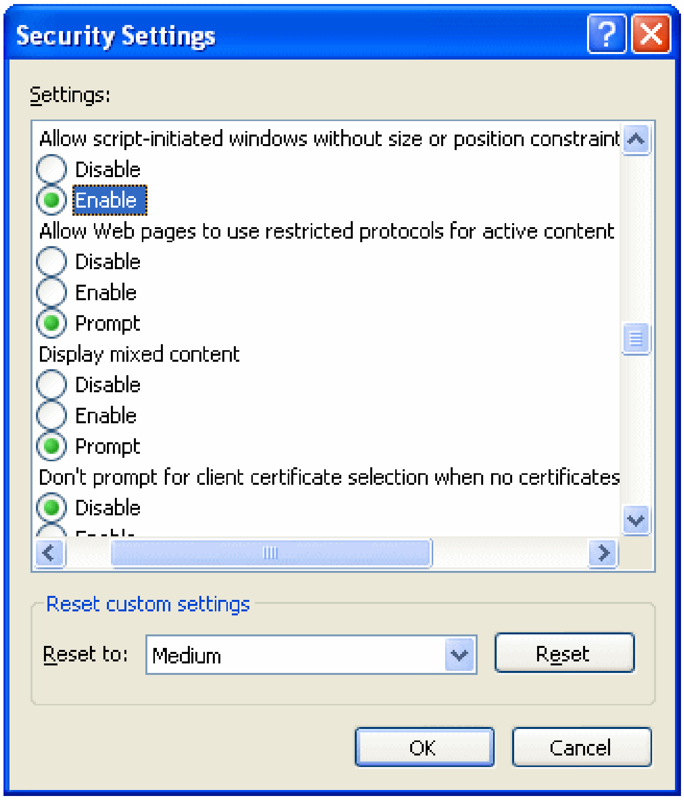
The Web Server has been restored.

Troubleshooting

Common Issues

The Add Attachment dialog box is not displayed correctly so the task buttons are not available.

In order for OnBase to correctly display the **Add Attachment** dialog box, the OnBase Web Server you are accessing must be added to the Local intranet zone, or you must set your web browser's security settings to enable the **Allow script-initiated windows without size or position constraints** option.



Error Messages

An error occurred while processing your request. Message: Root element is missing

This error may be displayed when a user attempts to add a document to Workspace via the Context drop-down list in the OnBase Web Client if the solution is licensed for WorkView and the WorkView tables in the OnBase database are out-of-date or do not exist.

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.

Hyland ActiveX Controls Installers

The ActiveX controls needed to successfully operate the OnBase Web Client are installed automatically via the Web Server upon first use, when the Web Server is included as part of an installation.

Under certain security policies, or for various other reasons, these controls may not be available for download and installation from the Web Server. Some integrations may also require ActiveX controls that are not installed via the Web Server, or the Web Server may not be part of the overall solution. In these situations, the necessary ActiveX controls can be installed using one of the separate Hyland ActiveX Controls installers:

- **Hyland Web ActiveX Controls Installer:** Installs the controls required by the Web Client and dependent modules.
- **Hyland ActiveX Integration Controls:** Installs the controls required by some integrations.

This chapter contains details on running both 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.

Installer Prerequisites

The installer must be run on operating systems that support the Windows® Installer 3.0+ architecture.

The installer setup executable (**setup.exe**) detects most of the prerequisites for the module that are also required for installation and installs them, if necessary. If the installer fails to run, install all of the requirements for the module separately before relaunching the installer. Module requirements can be found in the installation chapters of the corresponding module reference guides.

Note: If installation is being performed using the installer MSI file, the requirements for the module must be installed before launching the installer.

Installer User Permissions

You must be logged on to the installation machine with administrator privileges in order to run the installer.

If installing under Windows operating systems with UAC enabled, the installer must be run with elevated administrator privileges, even if the user currently logged in is an administrator.

Installer .NET Framework Requirements

The installer must be run on a machine that meets the .NET Framework requirements of the module being installed. Module requirements can be found in the installation chapters of the corresponding module reference guides.

OnBase requires Microsoft .NET Framework 4.7.2 or later. The .NET Framework can be obtained from the Microsoft Download Center at http://www.microsoft.com/downloads.

Windows User Account Control Statement

Hyland Software is dedicated to ensuring that OnBase is compatible with Windows User Account Control (UAC). UAC is a feature of Windows operating systems that was introduced with Windows Vista. It limits the ability of standard users to make global system changes to a workstation and prevents malicious software from making unauthorized changes to protected areas.

For details on UAC, refer to your Microsoft support information or see http://technet.microsoft.com/en-us/library/cc709691(WS.10).aspx.

You may encounter UAC in OnBase when:

- Installing or uninstalling OnBase, OnBase modules, or OnBase ActiveX controls.
- Copying, moving, or saving files to the Program Files directory, Windows directory, or another protected location.
- Modifying system-wide settings, such as the registry.
- Re-indexing a document or opening a scanned batch using published Internet Explorer from a Remote Desktop Server.

If Windows UAC is enabled, the above operations may prompt for administrator privileges or credentials, even if an administrator is currently logged on.

Hyland Web ActiveX Controls Installer

The ActiveX controls needed to successfully operate the OnBase Web Client are installed automatically via the Web Server upon first use, when the Web Server is included as part of a Core installation.

Under certain security policies, or for various other reasons, these controls may not be available for download and installation from the Web Server. In these situations, the necessary ActiveX controls can be installed using the Web ActiveX Controls installer.

The Web ActiveX Controls installer installs the following files and controls:

- AEXCommServer.dll
- OBXWebControls*.ocx
- dmimage_web*.dll
- dmlocale_web*.dll
- dmmailsvc_web*.dll
- dmtrace_web*.dll

The Hyland Web ActiveX Controls installer uses an installation wizard that is located in the OnBase installation directory, typically under **\install\Web ActiveX Controls**.

Running the Installer

To launch the wizard, double-click **Hyland Web ActiveX Controls.msi**. The **Hyland Web ActiveX Controls** welcome screen is displayed.

Note: In order to ensure that the Web pages are able to instantiate the methods they need within the controls, the installation location of the Web ActiveX controls is added to the system **PATH** environment variable. This means the installer may have to be deployed by a local administrator in order to complete a successful installation.

1. Click **Next**. The **Destination Folder** dialog is displayed.
2. Choose a location to install the ActiveX controls. The default location is **C:\Program Files\Hyland\Web ActiveX**. Click **Change...** to install the controls to a different location.

Note: Under 64-bit systems, use the **Program Files (x86)** folder.

3. Click **Next**. The **Ready to Install the Program** dialog is displayed.
4. Click **Install** to proceed with the installation or click **Cancel** to exit the installation. Click **Back** to change the values entered in previous dialogs.
5. Click **Finish** to complete the installation.

Controlling Installation from the Command Line

To run the Hyland Web ActiveX Controls installer from the command line, it must be launched using this command: **msiexec /i "Hyland Web ActiveX Controls.msi"**

Note: In order to ensure that the Web pages are able to instantiate the methods they need within the controls, the installation location of the Web ActiveX controls is added to the system **PATH** environment variable. This means the installer may have to be deployed by a local administrator in order to complete a successful installation.

Optional Command Line Switches

The Web ActiveX Controls installer can be run with the following switches:

- **WEBACTIVEXCONTROLS_FILES**: This is the location to which the controls are installed. By default, they are installed to **C:\Program Files\Hyland\Web ActiveX**.

  Use this switch to enter a different location to install the controls, for example:

  msiexec /i "Hyland Web ActiveX Controls.msi" WEBACTIVEXCONTROLS_FILES="C:\MyCustomFolder\Hyland ActiveX\"

Note: Under 64-bit systems, use the **Program Files (x86)** folder.

Change, Repair, or Remove an Installation

After initial installation, the setup program can be used to change, repair, or remove components from a previous installation. After launching **setup.exe** or the ***.msi** installation package, and clicking **Next** at the welcome dialog, the **Change, repair, or remove installation** dialog box is displayed.

Select the option for the actions you wish to perform:

Option	Description
Change	Add or remove components using the **Custom Setup** dialog. **Note:** This option is not available if the installer has no independently selectable features. The steps for adding selected components are the same as those under the Component Selection section of the installation instructions, if applicable to the installer. **Note: Change** does not allow you to alter configuration options originally set during a previous installation of components contained in the installer.
Repair	Repair errors in the most recent installation of the component, such as missing and corrupt files, shortcuts, and registry entries. **Note:** This option is not available from all installers. **Repair** does not include errors made in the configuration options set by the user during installation. For specific troubleshooting information regarding an installed component, see the module reference guide for that component.
Remove	Removes all previously installed components.

Hyland ActiveX Integration Controls

Some integrations require ActiveX controls that are not installed via the Web Server, or the Web Server is not included as part of the overall solution. In these situations, the required ActiveX controls can be installed using the separate Hyland ActiveX Integration Controls installer.

The Hyland ActiveX Integration Controls installer installs the following files and controls:

- dmimage_alt.dll
- dmlocale_alt.dll
- dmmailsvc_alt.dll
- dmtrace_alt.dll

- OBXAltDocumentSelect.ocx (32-bit) / HylandDocumentSelect.ocx (64-bit)
- OBXAltViewer.ocx (32-bit) / HylandViewer.ocx (64-bit)

The Hyland ActiveX Integration Controls installer uses an installation wizard that is located in the OnBase installation directory, typically under **\install\ActiveX Integration Controls**.

Running the Installer

To launch the wizard, double-click **Hyland ActiveX Integration Controls.msi**. The **Hyland ActiveX Integration Controls** welcome screen is displayed.

1. Click **Next**. The **Ready to Install the Program** dialog is displayed.
2. Click **Install** to proceed with the installation or click **Cancel** to exit the installation. Click **Back** to change the values entered in previous dialogs.
3. Click **Finish** to complete the installation.

Note: In order to ensure that the integrations are able to instantiate the methods they need within the controls, the installation location of the Hyland ActiveX Integration Controls is always **C:\Program Files\Hyland\Alt ActiveX**. Under 64-bit systems, the **Program Files (x86)** folder is used.

Controlling Installation from the Command Line

To run the Hyland Web ActiveX Controls installer from the command line, it must be launched using this command: **msiexec /i "Hyland ActiveX Integration Controls.msi"**.

Note: In order to ensure that the integrations are able to instantiate the methods they need within the controls, the installation location of the Hyland ActiveX Integration Controls is always **C:\Program Files\Hyland\Alt ActiveX**. Under 64-bit systems, the **Program Files (x86)** folder is used.

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Remove	Removes all previously installed components.

Collaboration

Administration Guide

Foundation EP5

Configuration

Configuration of the Collaboration module consists of the following items:

- Assigning the Collaboration User Group Product Right
- Configuring templates by which to base Workspaces - Configuration Module
- Creating Workspaces - Client Module

  Create Workspaces

  Assign users to Workspaces

  Assign Discussion Thread rights, WorkView Object rights, document rights to those users

  Configure notification options
- Configuring documents or WorkView Objects that are not in a Workspace with Discussion Threads - Client Module

  You can assign Discussion Threads to individual documents that are not in a Workspace.

  You can also assign user groups and/or users to the Discussion Thread, and configure notifications to be sent whenever someone replies to the Discussion Thread.

Note: Although you can configure templates and Workspaces for your system prior to using the Collaboration features, creating Workspaces, Discussion Threads and configuring both for users and default settings will often take place during the usage of Collaboration.

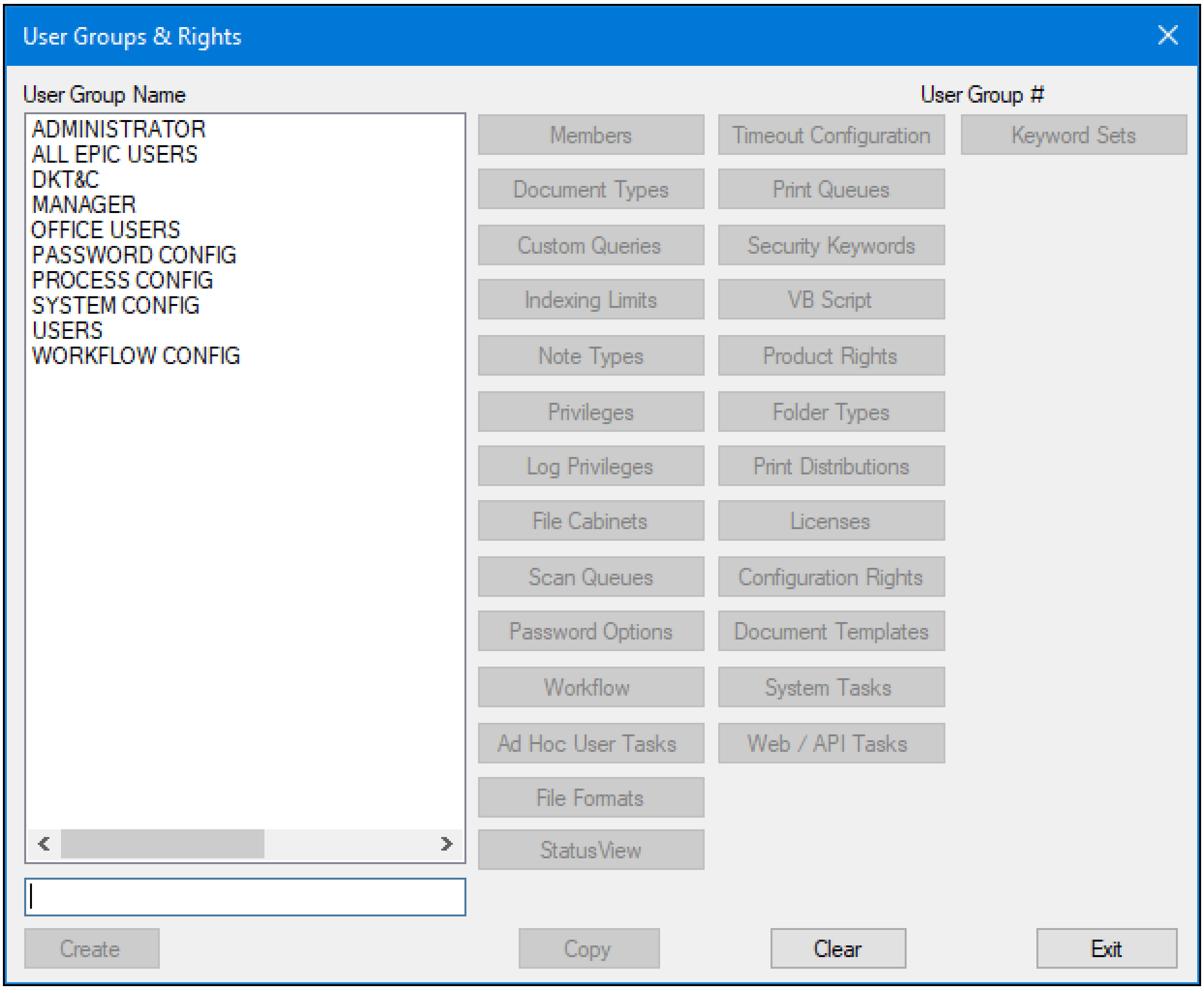
For this reason, all configuration items with the exception of Configuring Templates can be found in the usage section of this chapter.

Assigning the Collaboration User Group Product Right

To configure Collaboration, the user group (to which the user belongs) must be granted the **Collaboration** User Group Product Right.

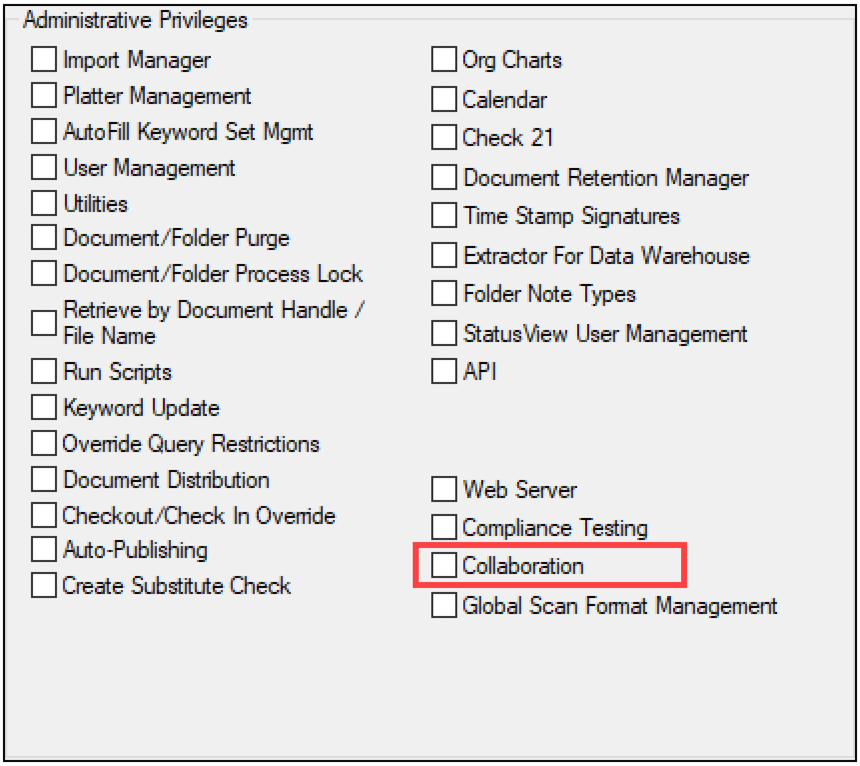
To assign product rights:

1. From the Configuration module, select **User | User Groups & Rights**. The **User Groups & Rights** dialog box is displayed.



2. Do one of the following:
   - Type the new user group name in the field below the **User Group Name** list and click **Create**.
   - Select an existing user group name from the **User Group Name** list.
3. Click the **Product Rights** button. The **Assigning Product Rights** dialog box is displayed.

4. Select the **Collaboration** option from the **Administrative Privileges** section.

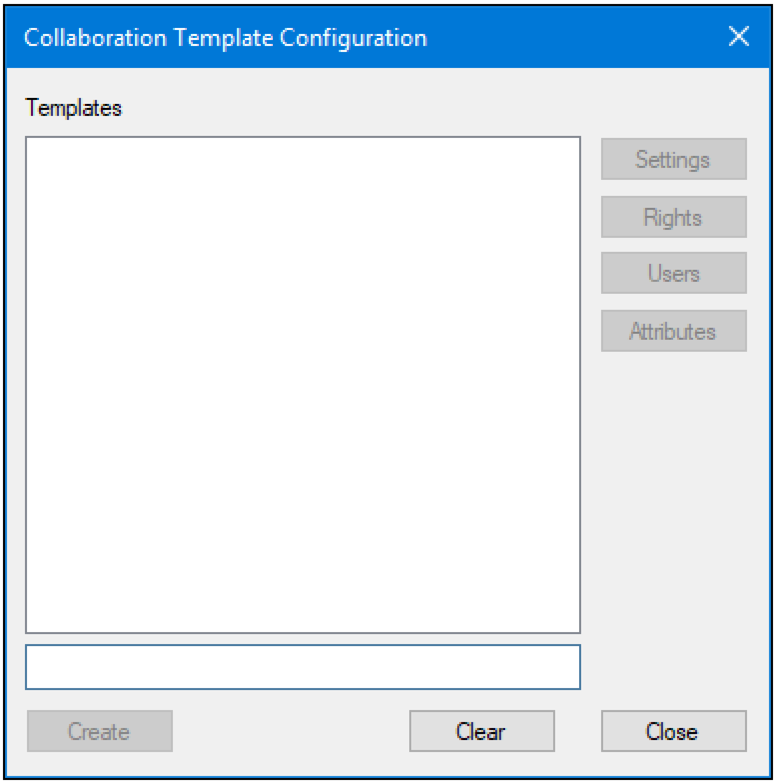


5. Click **Save**.

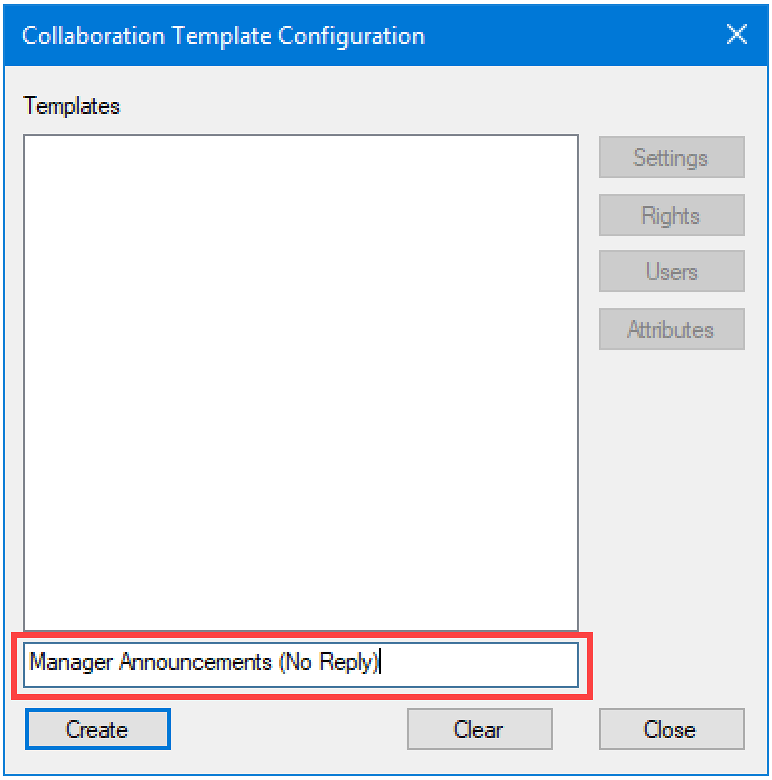
Configuring Templates

Templates provide the ability to create a Workspace using a set of pre-selected default settings. Upon using a template as the basis for a Workspace, the Workspace creator and/or administrator can change default settings as required.

1. From the Configuration module, select **Document | Collaboration Templates**. The **Collaboration Template Configuration** dialog box is displayed.

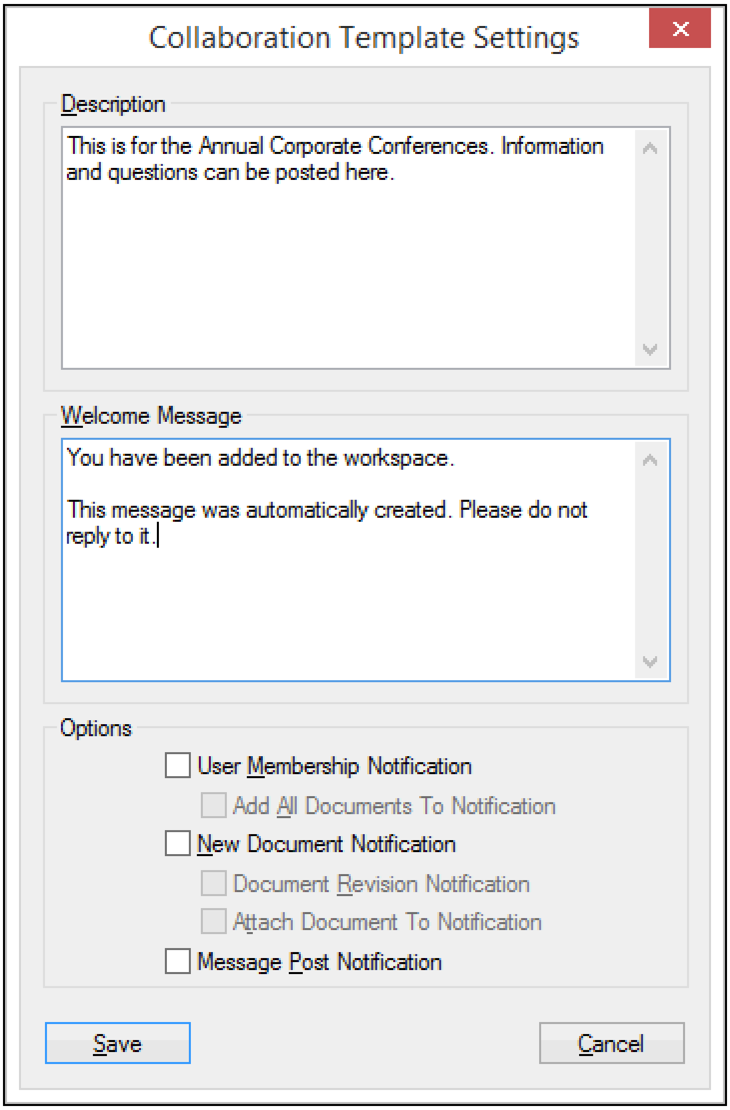


2. In the empty field below the **Templates** field, type a name for the template.



   Ensure the template name indicates the contents of the template so users administering Workspaces can distinguish between templates. For example, you could create a template that does not allow users to reply to posts and include **No Reply** in the template name.

3. Click **Create**. The **Collaboration Template Settings** dialog box is displayed.



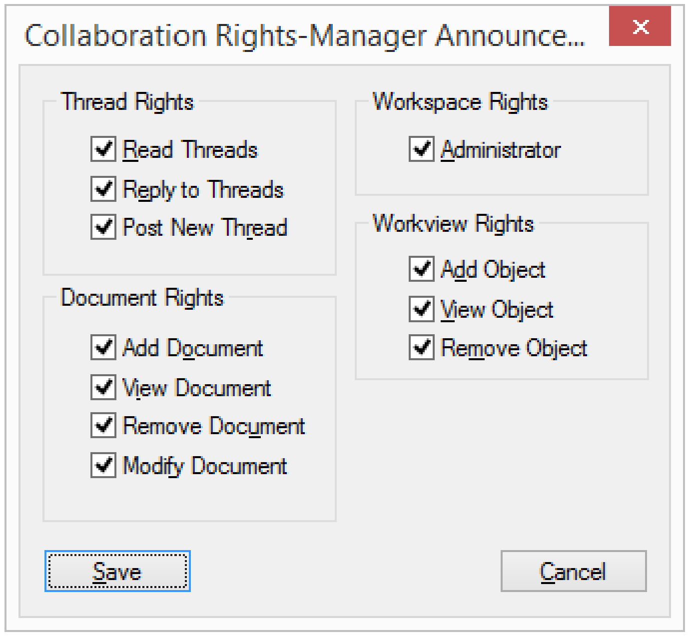
4. Type a useful description in the **Description** field.
5. Type a welcome message into the **Welcome Message** field. This message is automatically sent to a user once they are added to a Workspace. You may include other pertinent information such as required user names and passwords.
6. From the **Options** section, select any of the following notification options as default for the template.

Note: You can elect to turn on notifications to all users of the group as the default notifications are emails that are sent upon activity in the Workspace.

Options	Description
User Membership Notification	Sends a notification to all Workspace members that they are invited into the new Workspace.
Add All Documents to Notification	Adds all documents in the Workspace to the user membership notifications.
New Document Notification	Sends a notification to users when a new document is added to the Workspace.
Document Revision Notification	Notifies members of a workspace if a new revision of an existing workspace document was added. Revision comments are included in the notification. **Caution:** Notifications are only sent if the document was revised from within the OnBase Client. If the revision occurs from within a Core-based product (for example, the Unity Client or the Web Client), no notifications are sent.
Attach Document to Notification	Attaches the new document to the new document notification.
Message Post Notification	Sends a notification to users when a new post (Discussion Thread) is added to the Workspace.

Note: Even if users are not permitted to view documents, if a notification is configured to contain documents, the user can open the document from the e-mail notification.

7. Click **Save**. The **Collaboration Rights** dialog box is displayed.



8. Select all Collaboration rights for the template. The following are the available rights:

Thread Rights	Description
Read Discussion Threads	Select to give users rights to read Discussion Threads in the Workspace.
Reply to Discussion Threads	Select to give users rights to reply to Discussion Threads in the Workspace.
Post a New Discussion Threads	Select to give users rights to create new Discussion Threads in the Workspace.

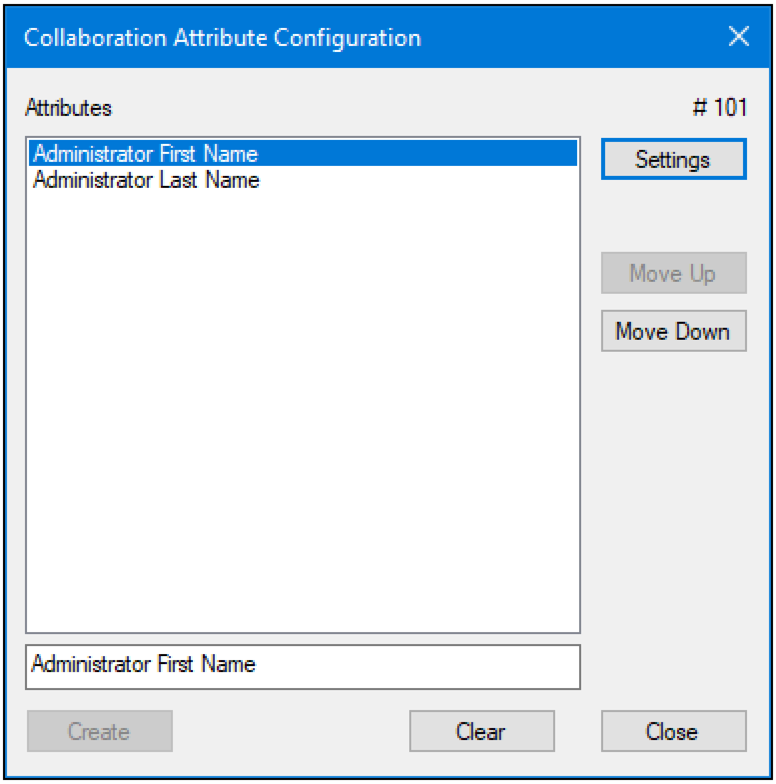
Workspace Rights	Description
Administrator	Select to give users administrator rights to the Workspace. Administrator rights give users rights to all document, WorkView and Discussion Thread rights. **Note:** If the **Administrator** check box is selected, all other rights will be automatically distributed to users. You cannot de-select an option if it was automatically selected by selecting the **Administrator** check box.

Document Rights	Description
Add Document	Gives users the rights to add documents to the Workspace. Users may add a document to a Workspace by right-clicking on an open document or from the Document Search Results list.
View Document	Gives users the rights to view documents in the Workspace. **Note:** If a user is granted the **View Document** right for a Discussion Thread associated with a Workspace, he/she is able to view documents associated with the Workspace regardless of whether or not they have rights to the Document Type. **Note:** If the Discussion Thread was created at the document level, the user will not be able to view documents associated with the Discussion Thread if he/she does not have rights to the documents' Document Types.
Remove Document	Gives users the rights to remove documents from the Workspace. This does not remove documents from OnBase or all Workspaces, only from this Workspace.
Modify Document	Gives users the rights to modify documents in the Workspace. **Note:** If a user has the rights to modify a document outside of the Workspace, that user will be able to modify that document within the Workspace even if the **Modify Document** option is not selected.

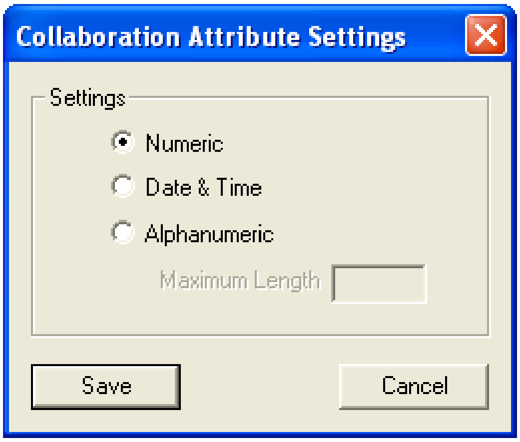
WorkView Rights	Description
Add WorkView Object	Gives users the rights to add WorkView Objects to the Workspace.
View WorkView Object	Gives users the rights to view WorkView Objects in the Workspace.
Remove WorkView Object	Gives users the rights to remove WorkView Objects from the Workspace.

Note: You must be licensed for WorkView to use WorkView objects in Collaboration. See the WorkView Help for details on WorkView Objects.

9. Click **Save**. The **Collaboration Attribute Configuration** dialog box is displayed.



10. Type an attribute in the field below the **Attributes** list. Attributes are used to identify individual Workspaces that are created with the same template. The creator or administrator of a Workspace can supply an attribute value to the Workspace upon creating or configuring the Workspace. Users can then use attribute values to search for a Workspace.
11. Click **Create**. The **Collaboration Attribute Settings** dialog box is displayed.



12. Select a setting for the attribute. The setting must match the data type of the attribute values used.

    The following settings are available. See the value requirements for each type:

Setting	Description
Alphanumeric	The maximum amount of characters allowed is 250. In the **Maximum Length** field, enter the maximum amount of characters for the alphanumeric attribute.
Date & Time	Must be a valid date and time. If no value is provided, 1964-01-01 00:00:00.000 is stored.
Numeric	The valid range for a numeric attribute is -2147483648 to 2147483647.

13. Click **Save**.
14. Repeat steps 10–13 for all remaining attributes.
15. When finished, click **Close** to exit the **Collaboration Attribute Configuration** dialog box. The following warning message is displayed: **Once the table is created you will not be able to configure it. Are you sure you want to create it?**
16. Click **Yes** to continue.
17. Click **Users**. The **Collaboration Template Default Users** dialog box is displayed.
18. Select all users you want to access Workspaces created with this template from the **Available Users** pane.
19. Click **Add**. The users are now displayed in the **Selected Users** pane.
20. Select a user from the **Selected Users** pane and click **Rights**. The **Collaboration Rights** dialog box is displayed. All settings that were selected as the default for this template are selected for the user.
21. Select or deselect additional Collaboration rights for the selected user. These settings affect the selected user only.
22. Click **Save**.
23. With the user still selected, click the **Options** button. The **Collaboration User Options** dialog box is displayed. All settings selected as the default for this template from the **Options** section of the **Collaboration Template Settings** dialog box are selected.
24. Select or deselect additional notification rights for the selected user. These settings will affect the selected user only.

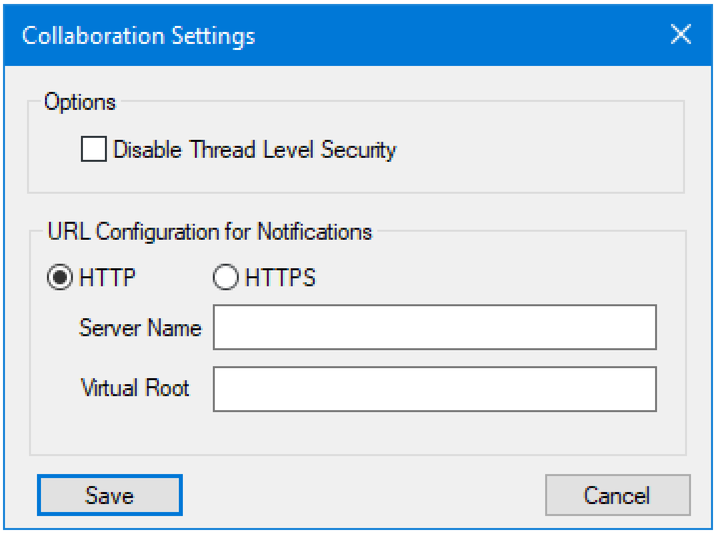
Note: The **User Membership Notification** and **Add All Documents to Notification** options are available at the default template configuration only, not for individual users.

25. Click **Save**.
26. Click **Save**.
27. Click **Close** to exit the **Collaboration Template Configuration** dialog box.

Disabling Thread Level Security

You can disable thread level security for all users. This provides the ability for the system to ignore any previously-configured security on all threads if this option is enabled.

1. From the Configuration module, select **Document | Collaboration Settings**. The **Collaboration Settings** dialog box is displayed.

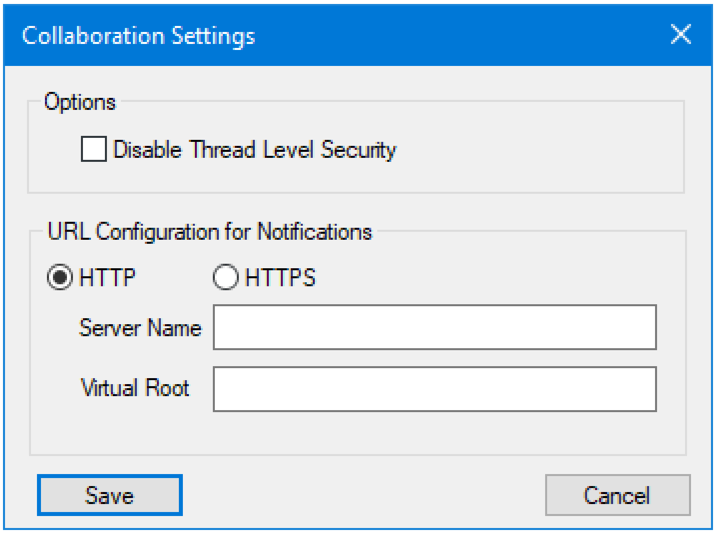


2. Select **Disable Thread Level Security**.
3. Click **Save**.

Configuring Notification URLs

The URL used when sending discussion notifications sent to external recipients from the Web Client can be configured in the Configuration module.

1. From the Configuration module, select **Document | Collaboration Settings**. The **Collaboration Settings** dialog box is displayed.

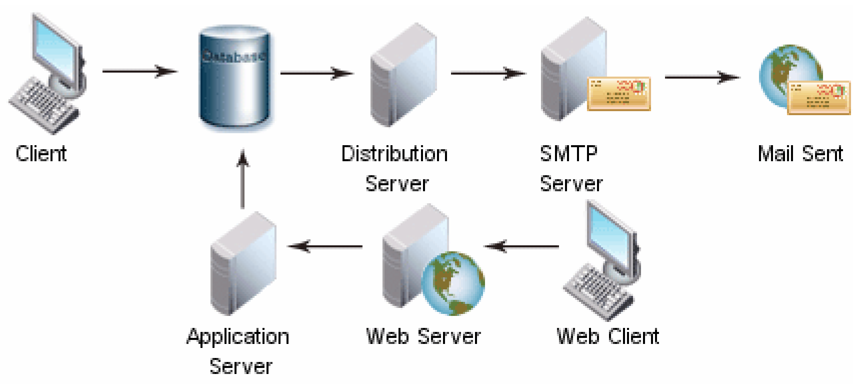


2. In the **URL Configuration for Notifications** section, select **HTTP** or **HTTPS**.
3. Enter the server name into the **Server Name** text field.
4. In the **Virtual Root** text field, enter the desired virtual root of the notification URL.

Overview

The Distribution Service is a Core Services component that integrates with several OnBase modules, allowing email notifications to be sent through a centralized mail service. All installation and configuration settings are located on one workstation as opposed to several workstations. This provides high security, control, and easy maintenance.

The Distribution Service process is depicted in the following illustration. The process begins when OnBase Client applications send system notifications to the database. The Distribution Service polls the database on a configured interval and composes an email when it receives a new notification. The service then sends the email to an SMTP server, where it is distributed externally to all users who are configured to receive notifications from modules that use the Distribution Service. When OnBase documents are attached to these emails, attachment names reflect the documents' Auto-Name strings in OnBase.



The Distribution Service can run on a machine separate from that of the Application Server.

Using the Distribution Service with Document Distribution

If you are upgrading from a version of OnBase prior to OnBase 15, and you are using the Distribution Service with Document Distribution, new configuration steps are required. If your system is configured with the Global Client Setting **Use Email Distribution Service for Document Distribution** enabled, a temporary file cache must be configured and associated with the Distribution Service.

See Configuring a Temporary File Cache on page 54 for more information.

Note: When the **Use Email Distribution Service for Document Distribution** setting is enabled and the **-STMTMAILSRVR** switch is applied to the OnBase Client shortcut, the OnBase Client will not check for bounce backs.

Configuration

There are several items that need to be configured to allow the Distribution Service to function properly. These items include:

- Configuring the Email Sending Unity Scheduler Task on page 34
- Enabling the Distribution Service on page 49
- Users Configuration Requirements on page 50
- Configuring Test Mode on page 51
- Adding Support for Multiple Data Sources on page 52
- Displaying the User Who Triggered the Notification as the Sender on page 61
- Configuring EML Transfer Encoding on page 53
- Configuring EML Transfer Encoding on page 53
- Sending Notifications in HTML Format on page 54
- Sending Unity Forms on page 54
- Configuring a Temporary File Cache on page 54
- Configuring Retry Settings on page 58
- Configuring Maximum Recipients on page 59
- Configuring Default Sender Options on page 60
- Configuring Attachment Options on page 61
- Configuring Email Server Settings on page 63
- Generating and Sending Test Notifications on page 65

Note: If you are using multiple databases, each database must have the Distribution Service Settings configured individually.

Configuring the Email Sending Unity Scheduler Task

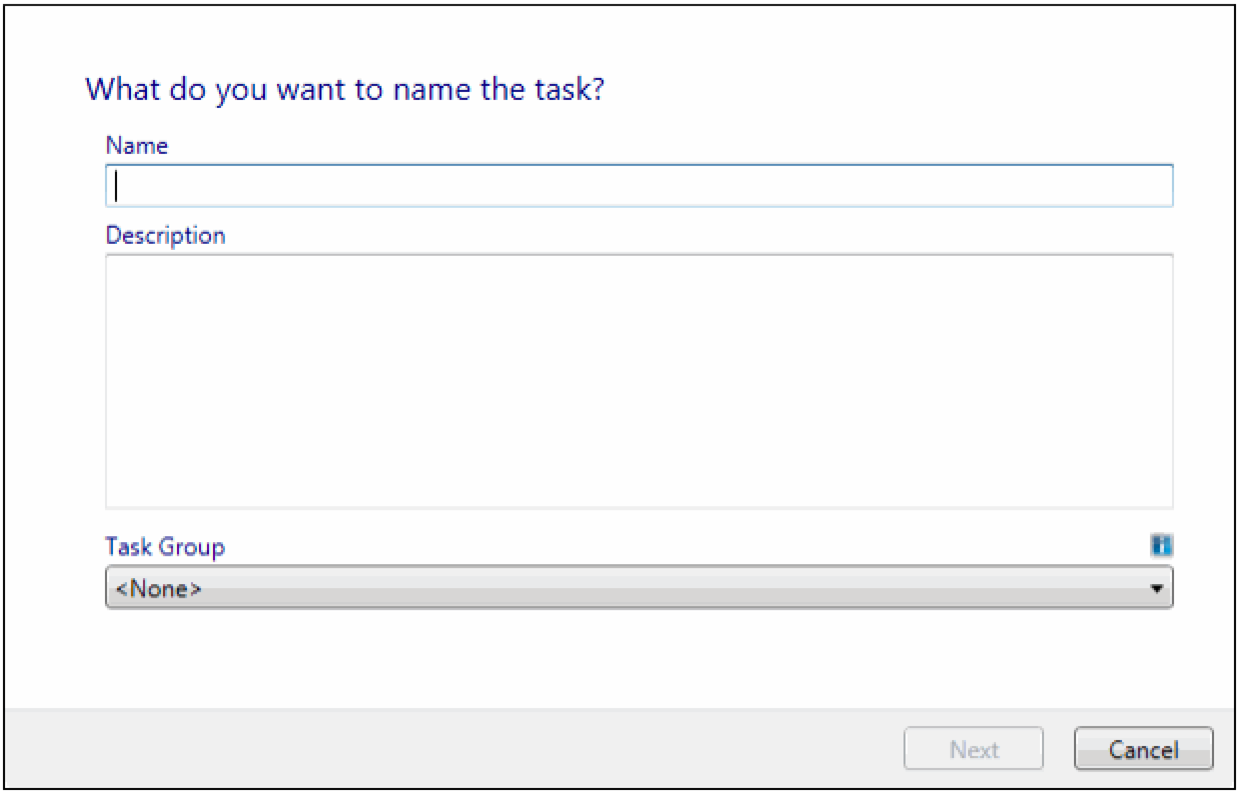
In order for the Distribution Service to function properly, a corresponding **Email Sending** Unity Scheduler task must be created and configured.

The following sections provide general instructions for creating Unity Scheduler tasks in the Unity Management Console. For more information on the Unity Scheduler, see the **Unity Scheduler** module reference guide.

Creating Tasks

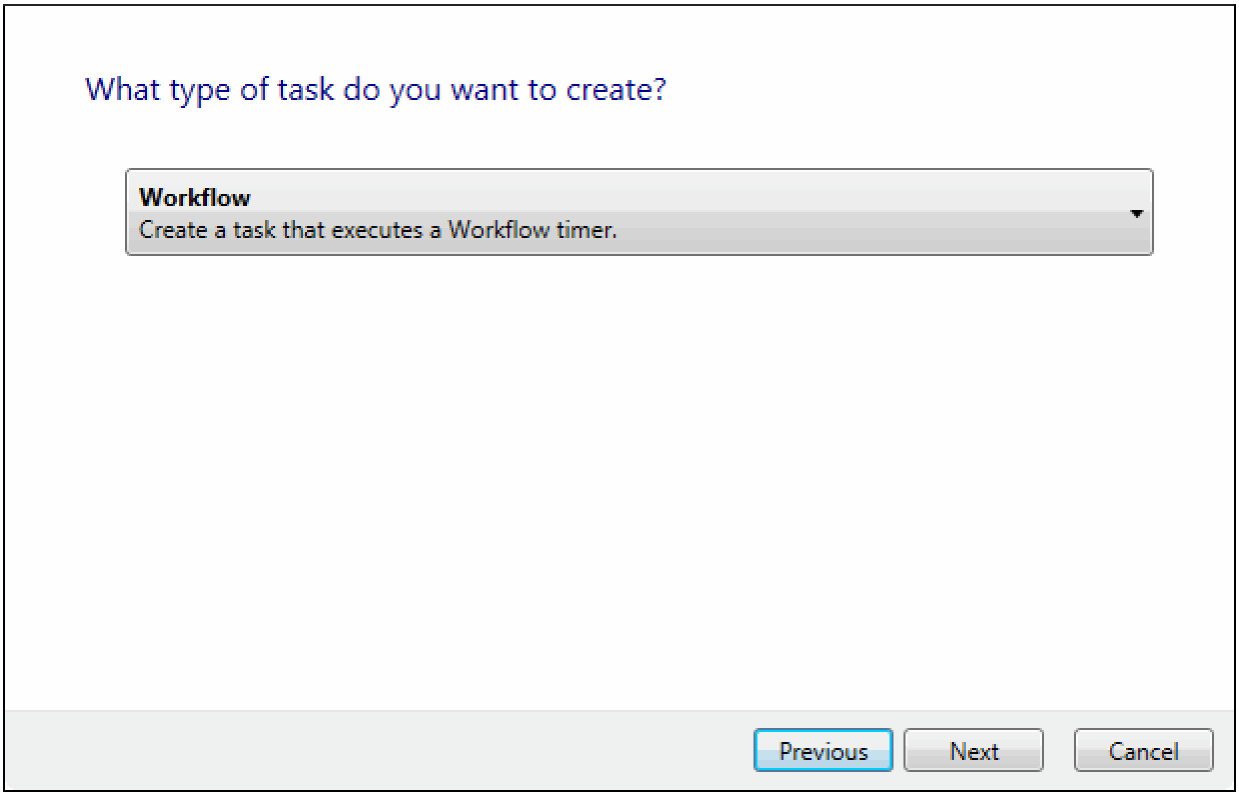
To create a task:

1. In the **Console** tree, select the task scheduler for which you want to add a task.
2. Right-click and select **Create Task**, or select **Create Task** in the **Action** pane.
   The **Task Wizard** is displayed.



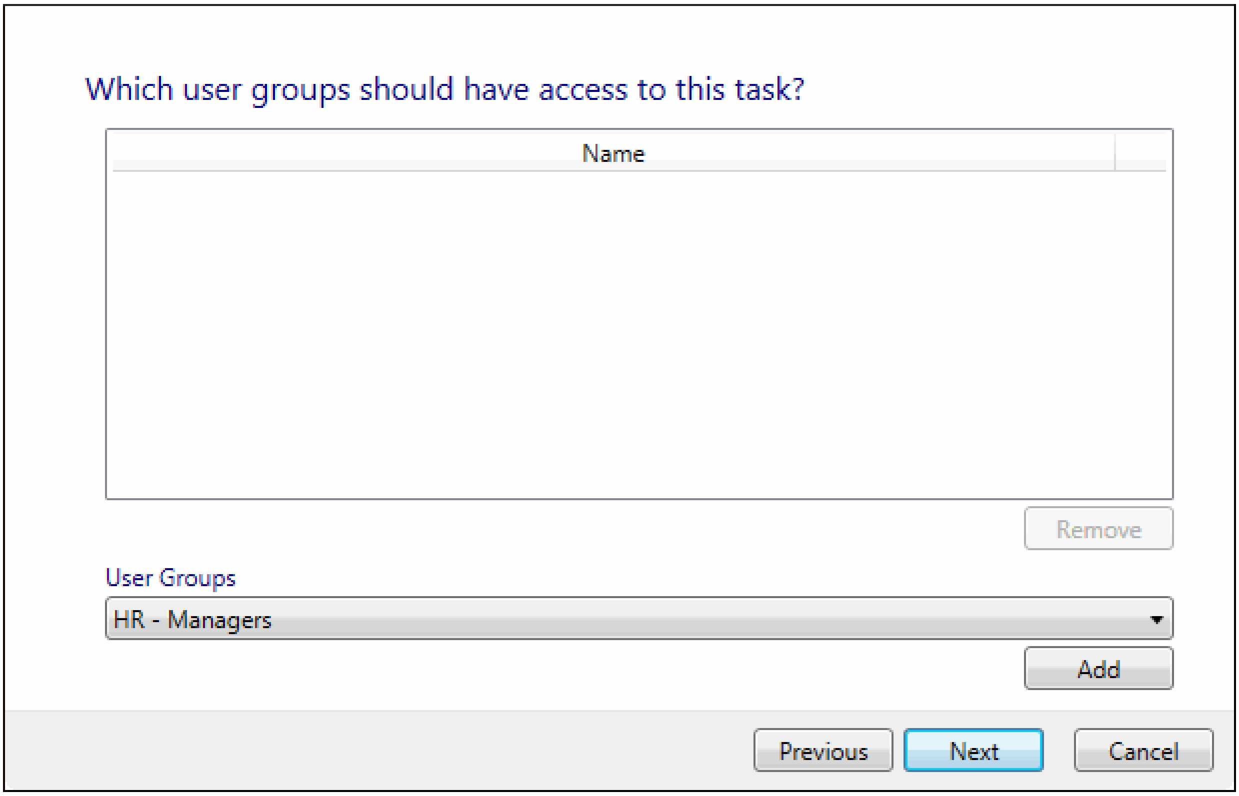
3. Enter a unique name for the task in the **Name** field.
4. Enter a description for the task in the **Description** field.
5. Select a task group from the **Task Group** drop-down list. Existing task groups are available for selection. If **<None>** is selected, the task is added to the **<Unassigned>** task group.

6. Click **Next**. The **Task Type Selection** page is displayed.



7. Select **Email Sending** from the drop-down list.
8. Complete the process in the next section, Configuring Tasks on page 37.

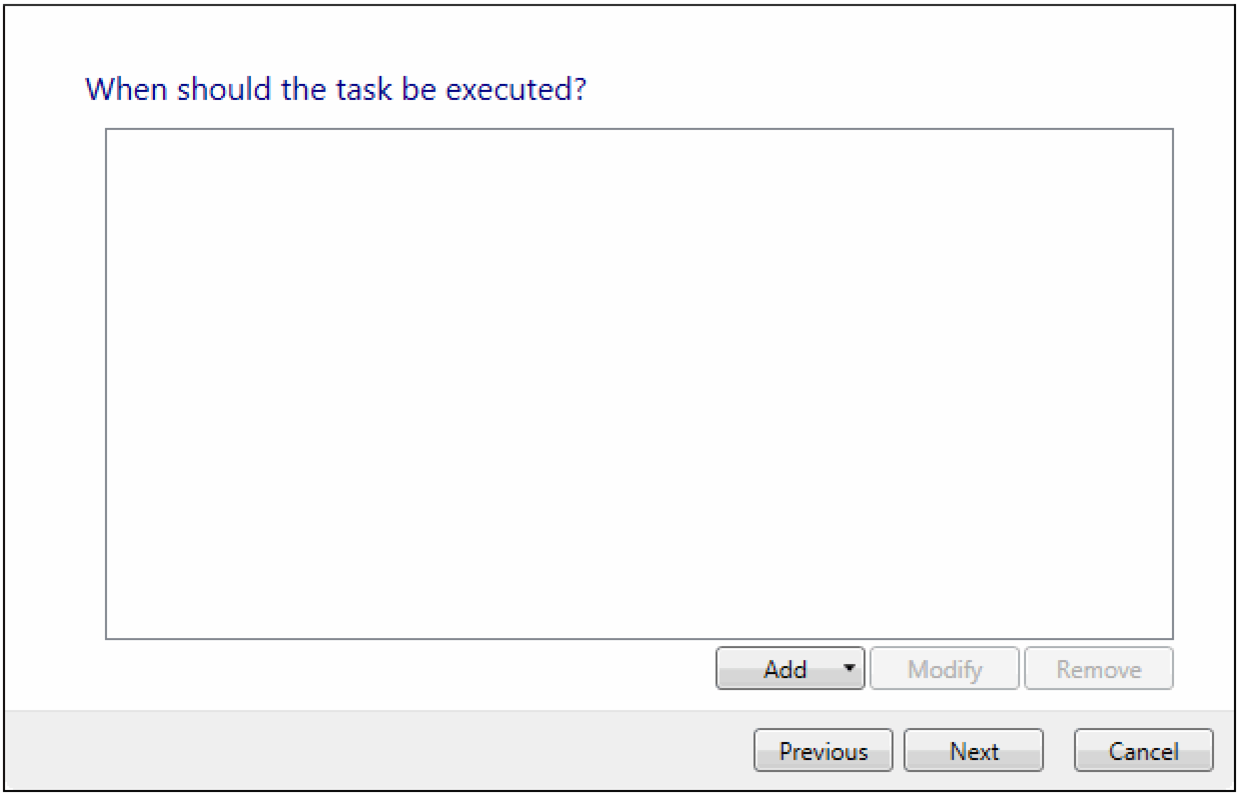
Configuring Tasks



1. Configure the user groups that will have access to manage this task. Select a user group from the **User Groups** drop-down list, then click **Add**.

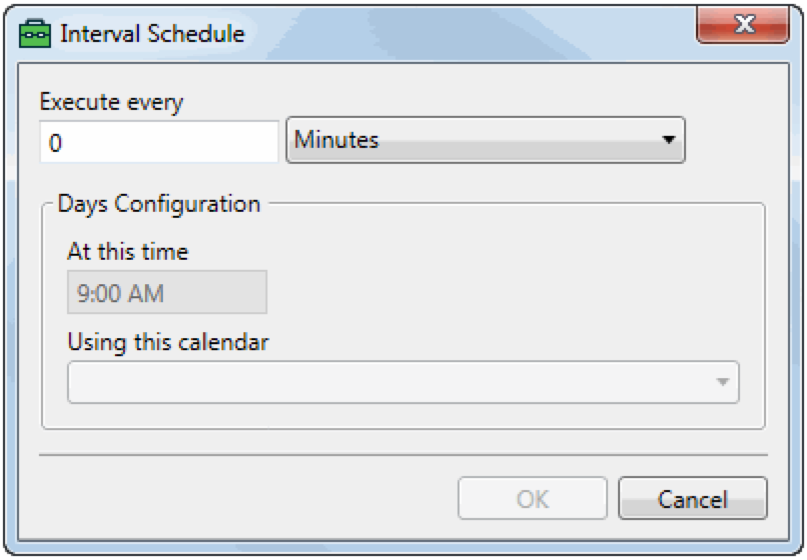
   To remove a group, select it from the list, then click **Remove**.

2. Click **Next**.


When should the task be executed?
Add
Modify
Remove
Previous
Next
Cancel

3. Click the **Add** drop-down list to choose a schedule for the task. Select one of the following options:
   - **Interval** - Executes the task once for every specified interval. For example, the task can be scheduled to execute once every two hours.

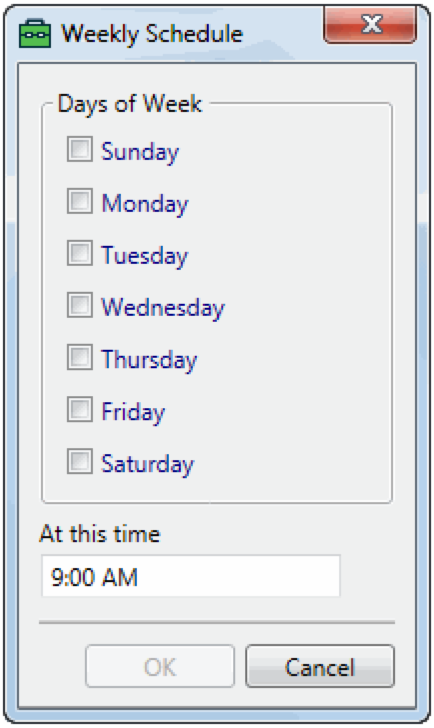
     The **Interval Scheduler** dialog box is displayed:

     Enter a numerical value in the **Execute every** field, then choose a unit of time in the drop-down list. If **Days** or **Business Days** is selected, enter a time in the **At this time** field to determine at what time in the day the task should execute. If **Business Days** is selected, select a calendar in the **Using this calendar** drop-down list to specify the calendar that defines business days. Click **OK**.

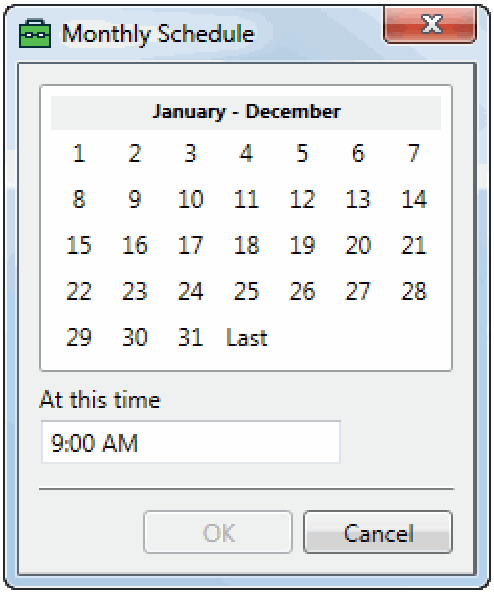
Note: If the **Using this calendar** drop-down list is unpopulated, a calendar has not yet been configured. For more information about configuring calendars, see the Org Charts and Calendars section of the **Workflow** module reference guide.

- **Weekly -** Executes the task every week at a specified time. The **Weekly Schedule** dialog box is displayed:



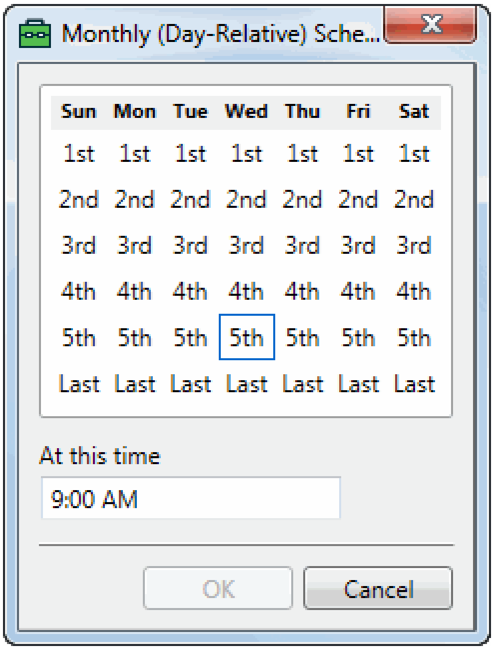
Select the days of the week on which you want this task to execute every week. Enter a time in the **At this time** field to specify the time of day this task should execute, then click **OK**.

- **Monthly** - Executes the task every month at a specified time. The **Monthly Schedule** dialog box is displayed:



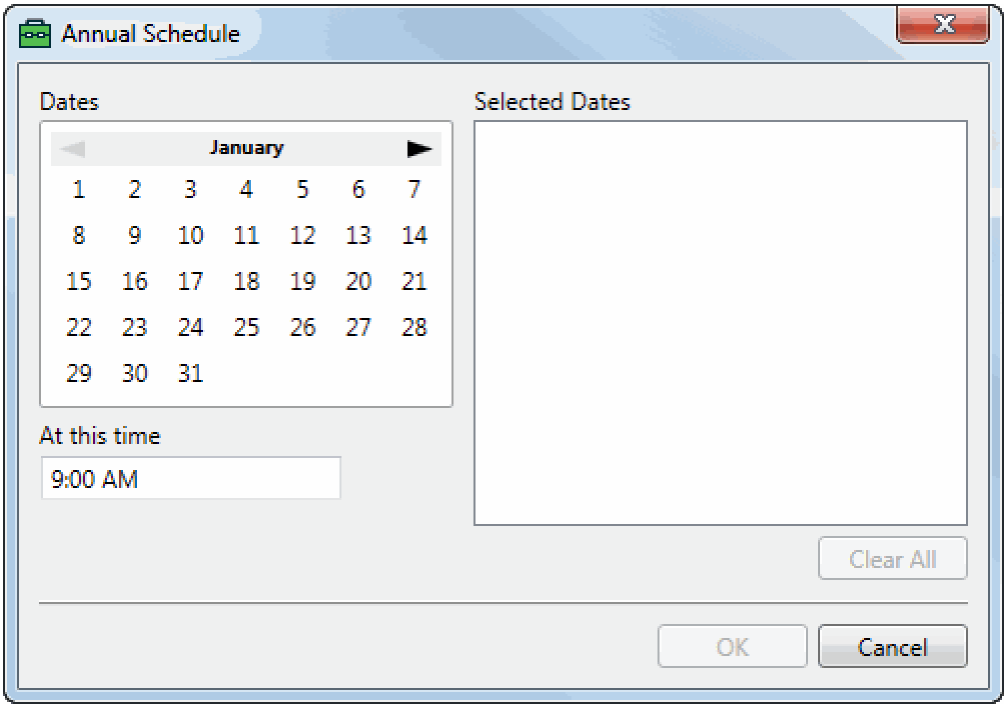
Select the dates on which you want this task to execute every month. Multiple dates can be selected. Select **Last** to schedule the task to execute on the last day of every month. Enter a time in the **At this time** field to specify the time of day at which this task should execute, then click **OK**.

- **Monthly (Day-Relative)** - Executes the task every month on either the first, second, third, fourth, or last instance of a specific day of the week. The **Monthly (Day-Relative) Schedule** dialog box is displayed:



Under the preferred day of the week, select whether you want this task to run on the 1st, 2nd, 3rd, 4th, 5th, and/or last instance of that day in the month. More than one selection can be made; for example, you can choose to schedule this task for both the 1st and 3rd Friday of every month). Enter a time in the **At this time** field to specify the time of day at which this task should execute, then click **OK**.

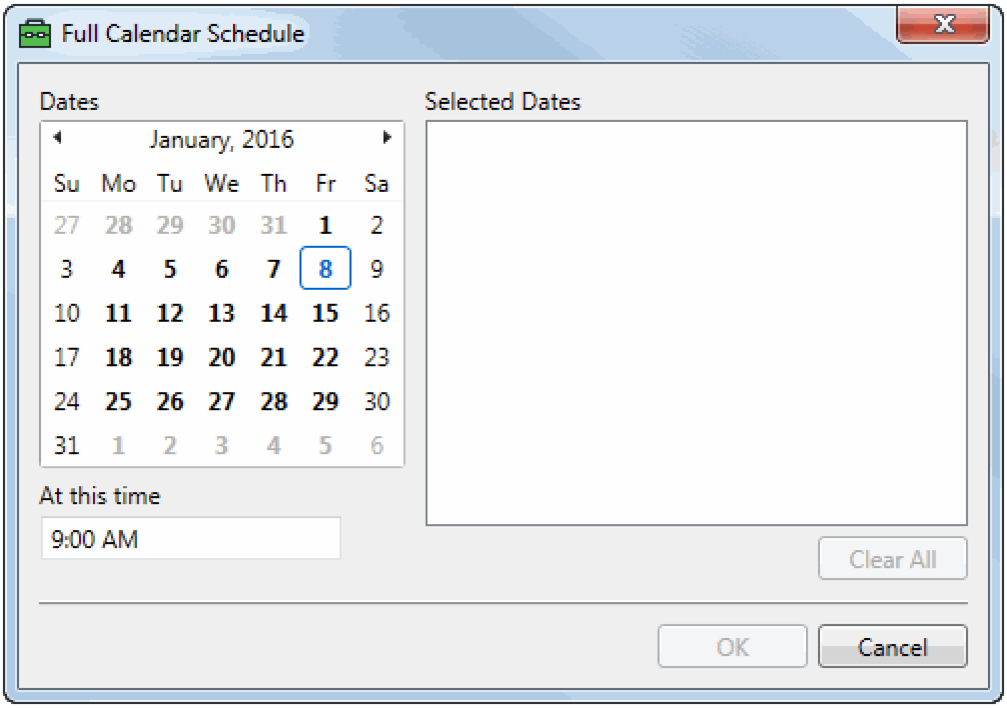
- **Annual -** Executes the task every year on a specified date. The **Annual Schedule** dialog box is displayed:



Select the date on which this task should execute every year. Multiple dates can be selected. Enter a time in the **At this time** field to specify the time of day at which this task should execute, then click **OK**.

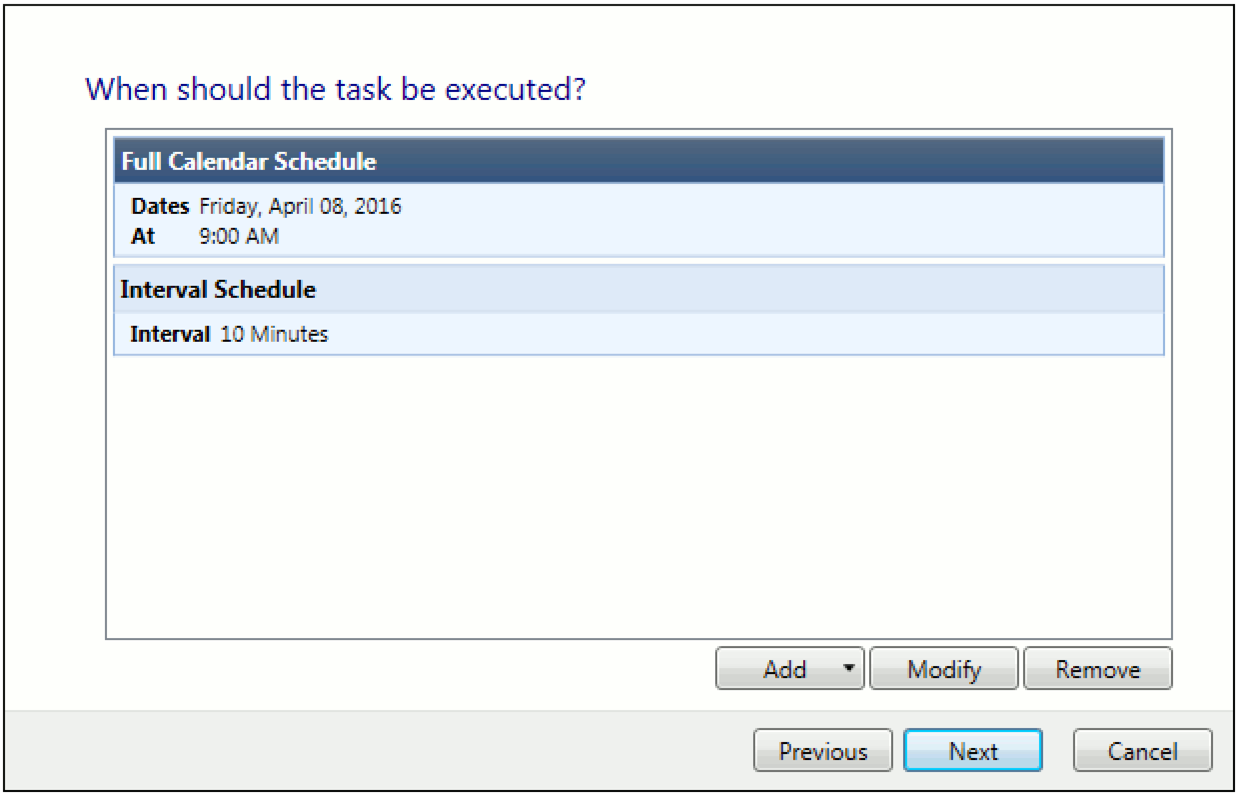
Note: The month of February also contains the **Last** option, so that the task can be scheduled to run on the last day of February every year, regardless of whether or not it is a leap year.

- **Full Calendar** - Executes the task on specific dates in a year. The **Full Calendar Schedule** dialog box is displayed:

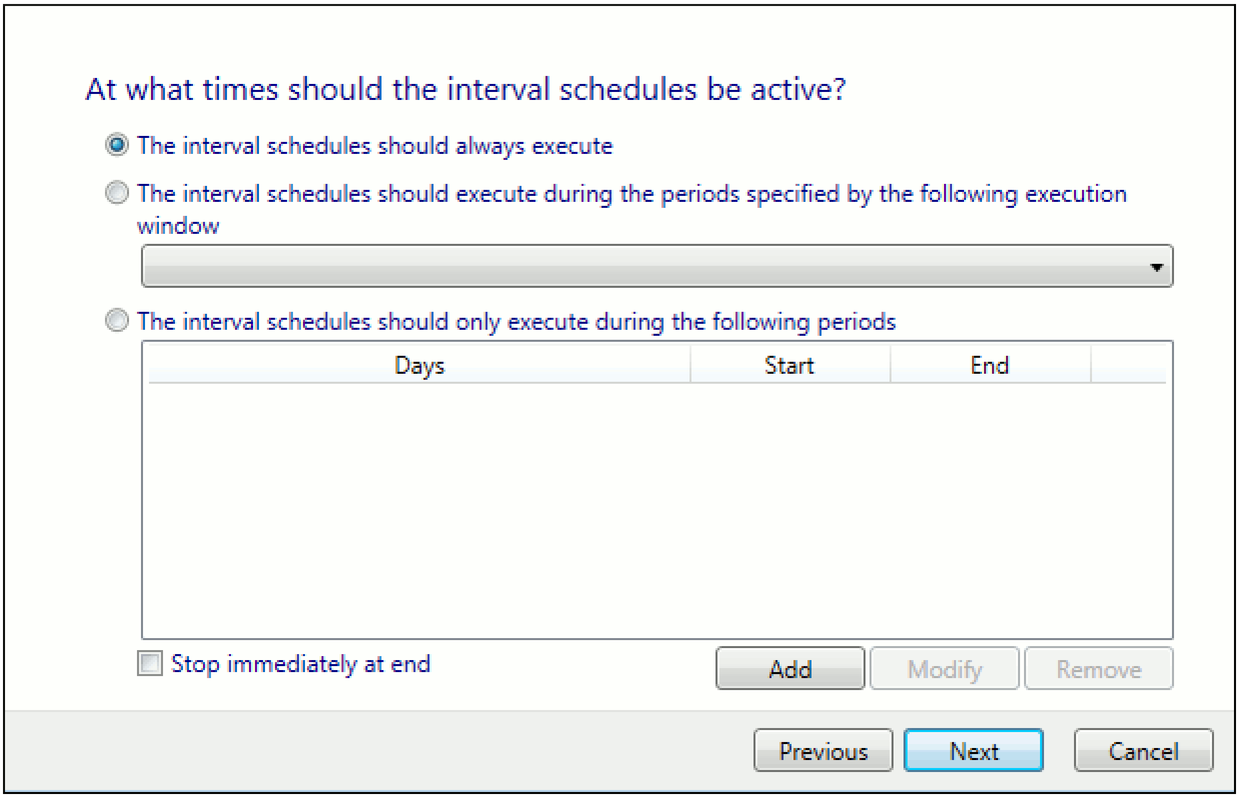


  Select the dates on which the task should execute. To select multiple dates, press and hold **Ctrl** while making your selections. To select multiple consecutive dates, select the first date, press and hold **Shift**, then select the last consecutive date. You can remove all of your selected dates by clicking **Clear All**. Enter a time in the **At this time** field to specify the time of day at which this task should execute, then click **OK**.
- **Existing Schedule** - Choose an existing named schedule that determines when the task should execute.

The configured schedules are added to the list.


When should the task be executed?
Full Calendar Schedule
Dates Friday, April 08, 2016
At 9:00 AM
Interval Schedule
Interval 10 Minutes
Add
Modify
Remove
Previous
Next
Cancel

4. Click **Next**. If you added one or more interval schedules, the following dialog box is displayed.

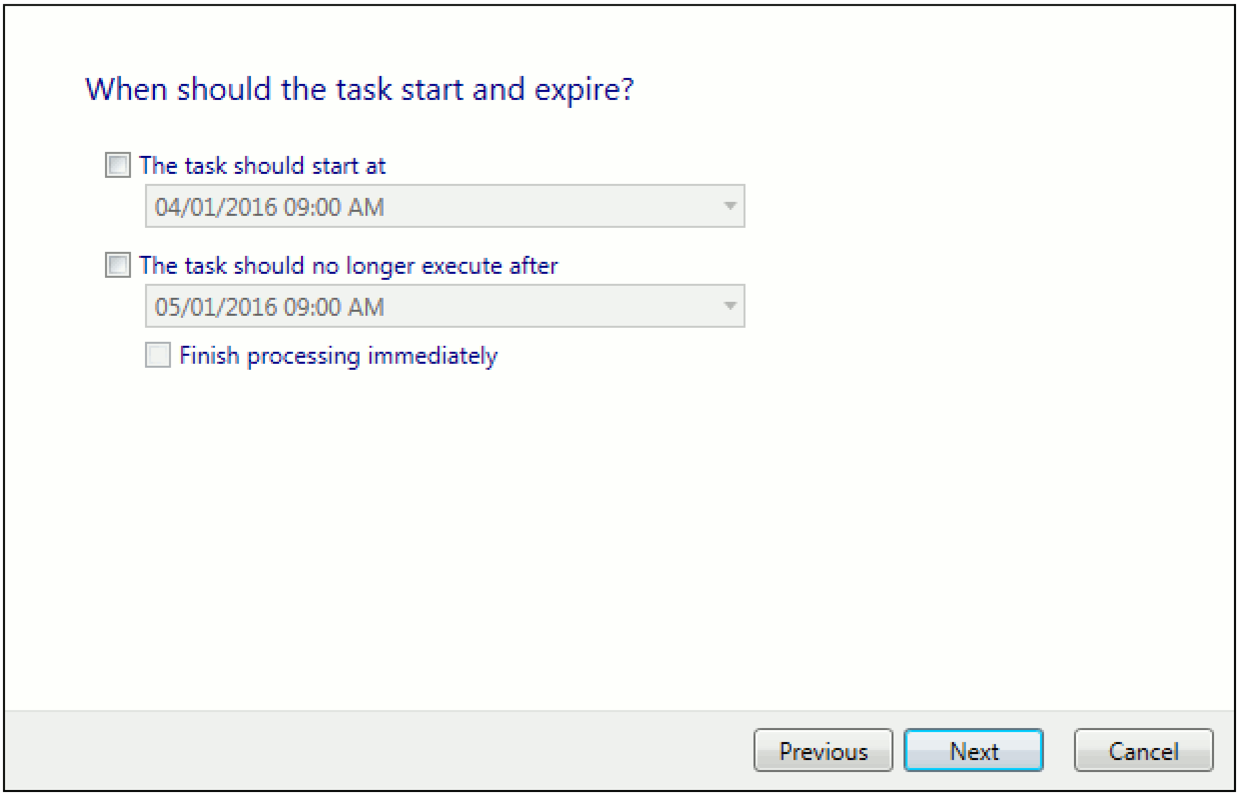


5. Select from the following options to determine when the interval schedules should execute:

Option	Description
The interval schedules should always execute	The interval schedules always execute at their configured times. For example, if an interval schedule is configured for 30 minutes, the interval schedule executes every 30 minutes without restriction.
The interval schedules execute during the periods specified by the following execution window	The interval schedules only execute during the days and times configured within the specified execution window. For example, if an interval schedule is configured for 30 minutes, and the execution window is Saturday, 9 a.m. until 5 p.m., the interval schedule executes at 9 a.m. on Saturday and every 30 minutes until 5 p.m. that Saturday. From the drop-down list, select the appropriate execution window.
The interval schedules should only execute during the following periods	The interval schedules only execute during the time periods configured within the ad hoc execution window. To create an ad hoc execution window, click the **Add** button. Select the days of the week and the time period the interval schedule should be run. Continue adding time periods as necessary. To abort task execution after the ad hoc execution window reaches the end of a time period, select the **Stop immediately at end** option. This makes it so that at the end of a time period, the schedule finishes processing the current item and stops. **Note:** Unity Script scheduler tasks must be written to specifically support the ability to stop immediately.

Note: Interval schedules are run at the earliest allowed time and then continue running for the configured intervals. For example, if an interval schedule is set for 10 minutes, and it begins on the current day, the next run time for the schedule is the time you finish configuration in the Task Wizard. The schedule then runs every 10 minutes for the duration of the specified time period.

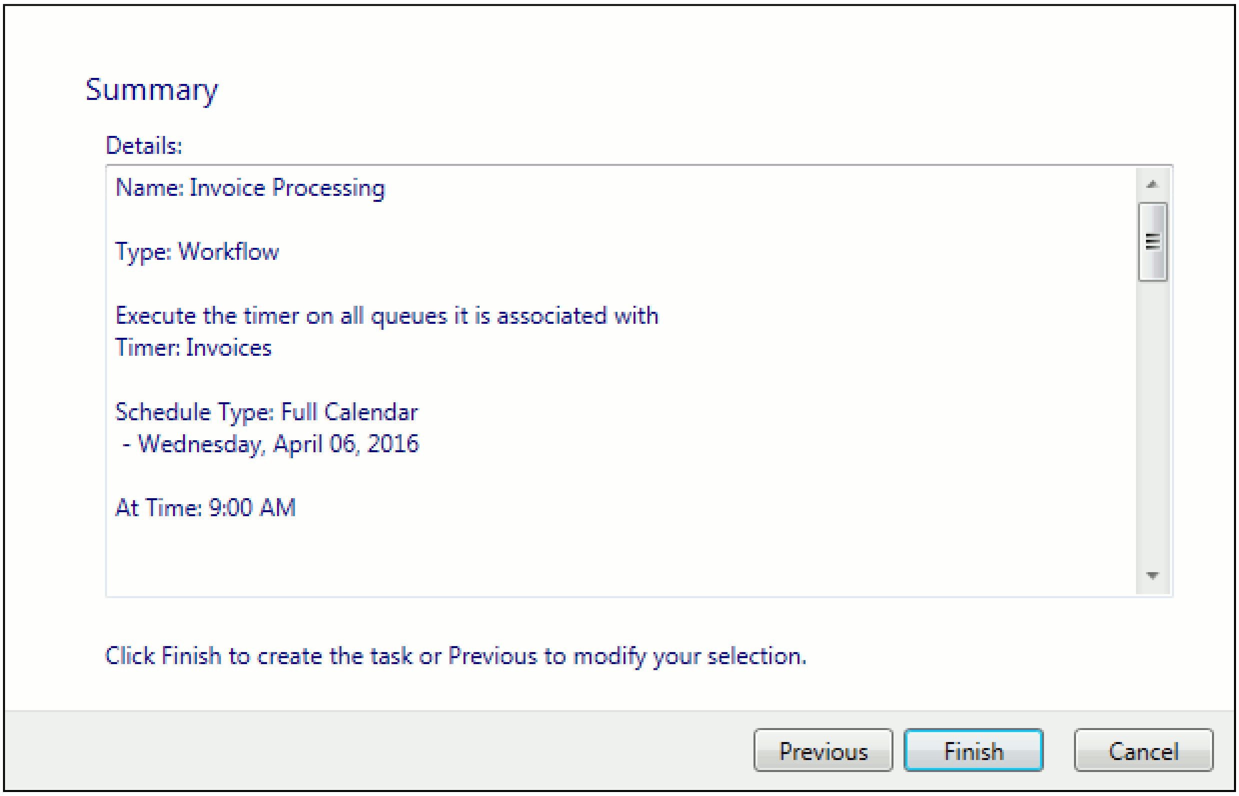
6. Click **Next**.



7. To set a specific start time, expiration time, or both, select from the following options:

Option	Description
The task should start at	Select to set a specific start time for the task. Enter or select the appropriate date and time.
The task should no longer execute after	Select to set a specific end time for the task. Enter or select the appropriate date and time.
Finish processing immediately	When selected, the task ends at its earliest opportunity after the end time passes. When deselected, the task ends after the end time passes and the entire task is completed. **Note:** This option is only enabled when **The task should no longer execute after** option is selected.

8. Click **Next**. The summary of your configuration is displayed.



9. Click **Finish** to save the task.

Enabling the Distribution Service

To use the Distribution Service to send users email notifications or to distribute emails, you must enable it through Global Client Settings. (This step is not necessary if the Distribution Service is used only by WorkView.)

The Distribution Service can be used to send email distributions while using the Document Distribution module and is optional.

The Distribution Service is optional if you want to send notifications for the following modules in the OnBase Client: Document Knowledge Transfer, Workflow, and Physical Records Management. The Distribution Service is required for all other modules that are able to send notifications (such as Document Knowledge Transfer or Workflow in the Web Client).

Enable Email Automation

To enable email automation using the Distribution Service:

1. From the Configuration module, select **Users | Global Client Settings**.
2. Click the **Email** tab.

3. Select the **Use Email Distribution Service for automated emails** check box or, if you are configuring the Distribution Service for Document Distribution, select the **Use Email Distribution Service for Document Distribution** check box.
4. Click **Save**.

Send Attachments

The Distribution Service can be configured to send attachments with certain file names.

Note: Image documents are sent in their native format if possible. However, if the document uses overlays or the page count is greater than one, it will revert to using the original method for sending attachments.

To configure file names for attachments:

1. From the Configuration module, select **Users | Global Client Settings**.
2. Click the **Email** tab.
3. Select one of the following from the **Auto-Name string for external email attachments** drop-down list:
   - **Random String:** OnBase will generate a random file name for the attachment.
   - **Document Type Autoname String:** OnBase will use the Auto-Name string configured for the Document Type of the document being sent.
   - **Document Type Print Autoname String:** OnBase will use the Print Title string configured for the Document Type of the document being sent. If no Print Title string has been configured for that Document Type, OnBase will use the Document Type and the Document Date.

Note: The **Document Type Print Autoname String** feature is not supported in the OnBase Client.

4. Click **Save**.

Note: The Distribution Service needs to be restarted after changes are made to the **Auto-Name string for external email attachments** setting.

Users Configuration Requirements

The following procedure describes the steps necessary to configure the Distribution Service for system notifications. Ensure users who will receive notifications have email accounts configured in their User Settings.

1. From the Configuration module, select **Users | User Names/Passwords**.
2. Select the user name and click **Settings**.
3. In the **Users Email** field, type the user’s email address.
4. Click **Save**.

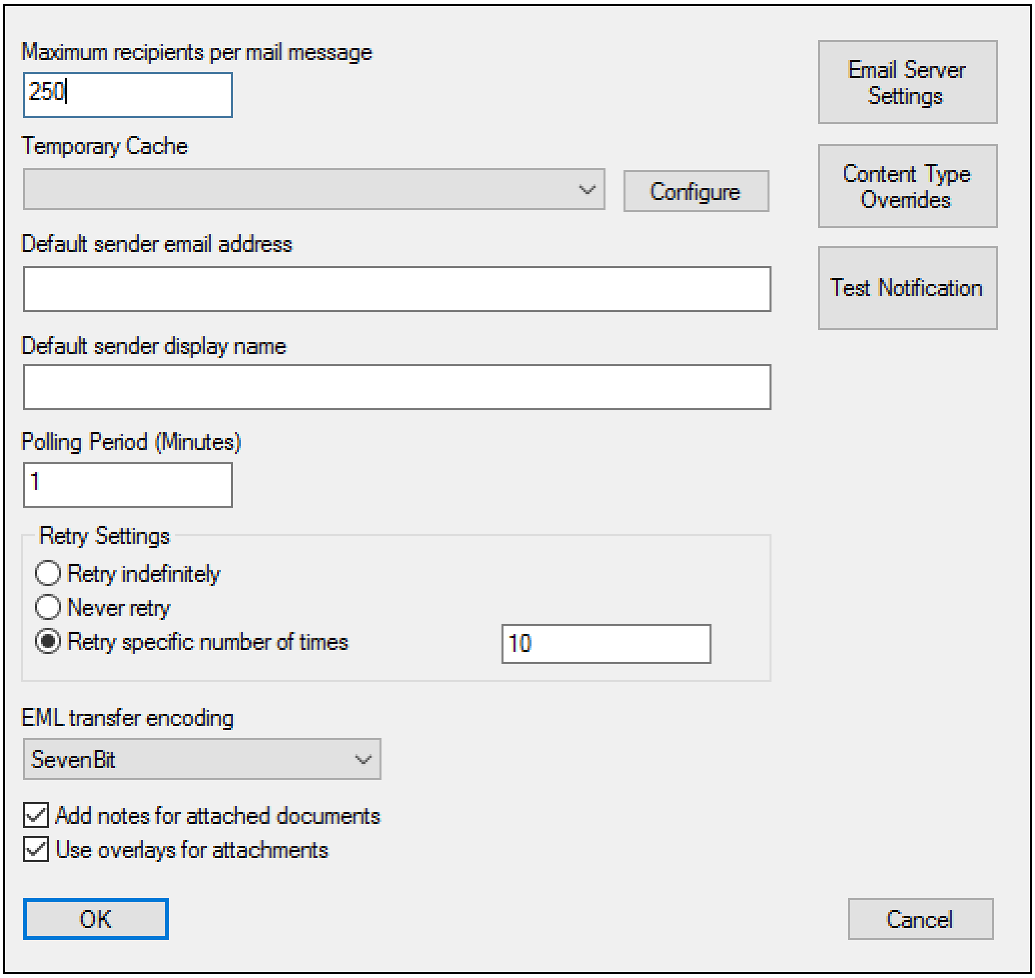
Configuring Test Mode

In a testing environment, you can configure the Distribution Service to write emails to a file in order to test messages without actually sending them to recipients.

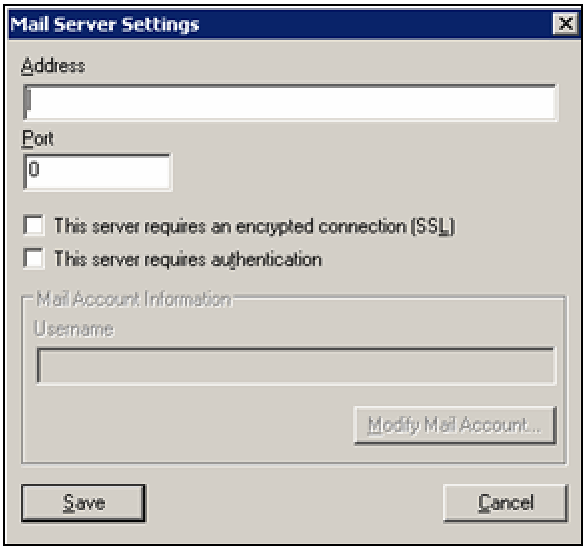
Caution: Testing should be performed in a separate testing environment. It is not recommended to use test mode in an environment with live data.

To configure test mode:

1. Open the OnBase Configuration module.
2. From the **Utils** menu, select the **Distribution Service Settings** option. The Distribution Service Settings dialog box is displayed.



3. Click the Email Server Settings button. The Mail Server Settings dialog box is displayed.



4. In the **Address** field, enter an address to a valid UNC path.
5. Click **Save**.

With test mode enabled, messages are saved in EML format to the specified location. These messages can be viewed, verified, and deleted as necessary.

Adding Support for Multiple Data Sources

If your solution uses multiple data sources, then the Hyland Distribution Service can be configured to access each data source. This provides multiple data sources for redundancy should a data source go down.

To configure the Hyland Distribution Service to access multiple data sources, a corresponding **Email Sending** Unity Scheduler task must be created for each data source. See the **Unity Scheduler** module reference guide for more information.

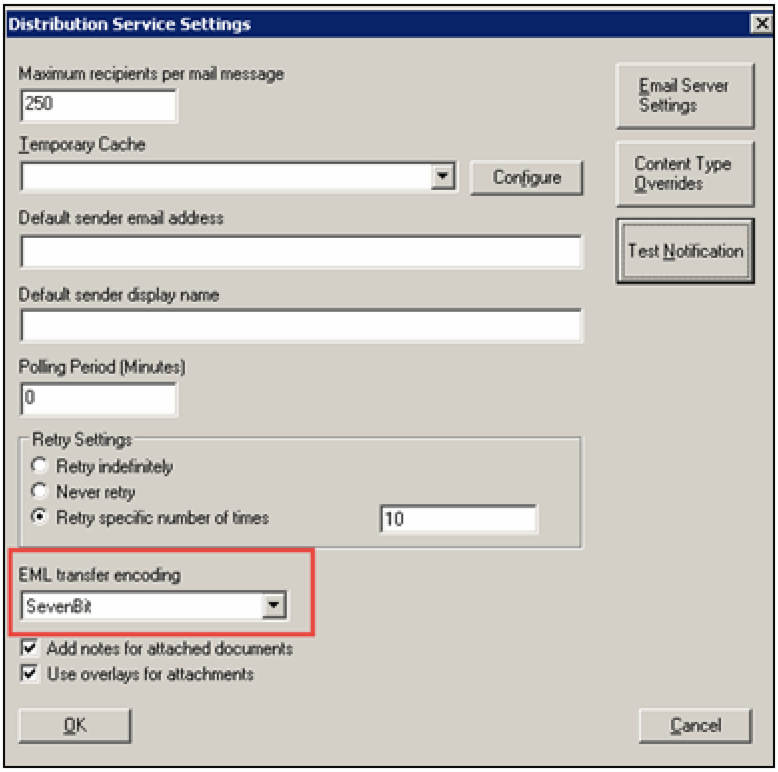
Note: To conserve system resources, increasing the polling period is recommended. This can be modified from the Unity Management Console. For more information on task scheduling, see the **Unity Scheduler** module reference guide.

Configuring EML Transfer Encoding

In some instances, you might want to output email notifications to EML files to be processed by a third-party mail application. When this method for distributing notifications is necessary, complete the following steps:

Note: EML files can also be used in testing.

1. Create a directory to store the EML files. This directory should be accessible locally, in a mapped drive or through an UNC path to a shared directory. The path name must be fully qualified. It must start with \\Name, where Name is the name of the machine name, or X:\, where X is any drive letter.
2. From the **Distribution Service Settings** dialog box, select an encoding option from the **EML transfer encoding** drop-down list.



3. Select from either **ServerBit** or **EightBit**.
4. Click **OK** to save the option.

Configuring the Distribution Service to Save Notifications as E-Mail (EML) Files

In some instances, you might want to output email notifications to EML files to be processed by a third-part mail application. When this method for distributing notifications is necessary, complete the following steps:

1. Create a directory to store the EML files. This directory should be accessible locally, in a mapped drive or through a UNC path to a shared directory. The path name must be fully qualified. It must start with \\[Name], where [Name] is the name of the machine name, or X:\, where X is any drive letter.
2. Modify the address in Configuration | Utils | Distribution Service Settings | Email Server Settings so that the address entry specifies this directory name. One file per notification will be written to the target directory specified.

Sending Notifications in HTML Format

If you want your notification to be received by the user in HTML format, the notification must be in plain text, and you must add the <HTML> tag to the body of your message.

Note: This applies only to plain text notifications. Formatted notifications does not support the use of HTML tags.

Sending Unity Forms

If you plan to send Unity Forms using the Distribution Service, please see Unity Forms Limitations on page 77.

Configuring a Temporary File Cache

A temporary file cache is recommended because email notifications and their attachments sent from Document Distribution may include emails and attachments that are not archived in OnBase. The Distribution Service sends these emails from the temporary file cache. Attachments are sent in their configured file format.

Access to the UNC share path of the Temporary File Cache must be provided for the following:

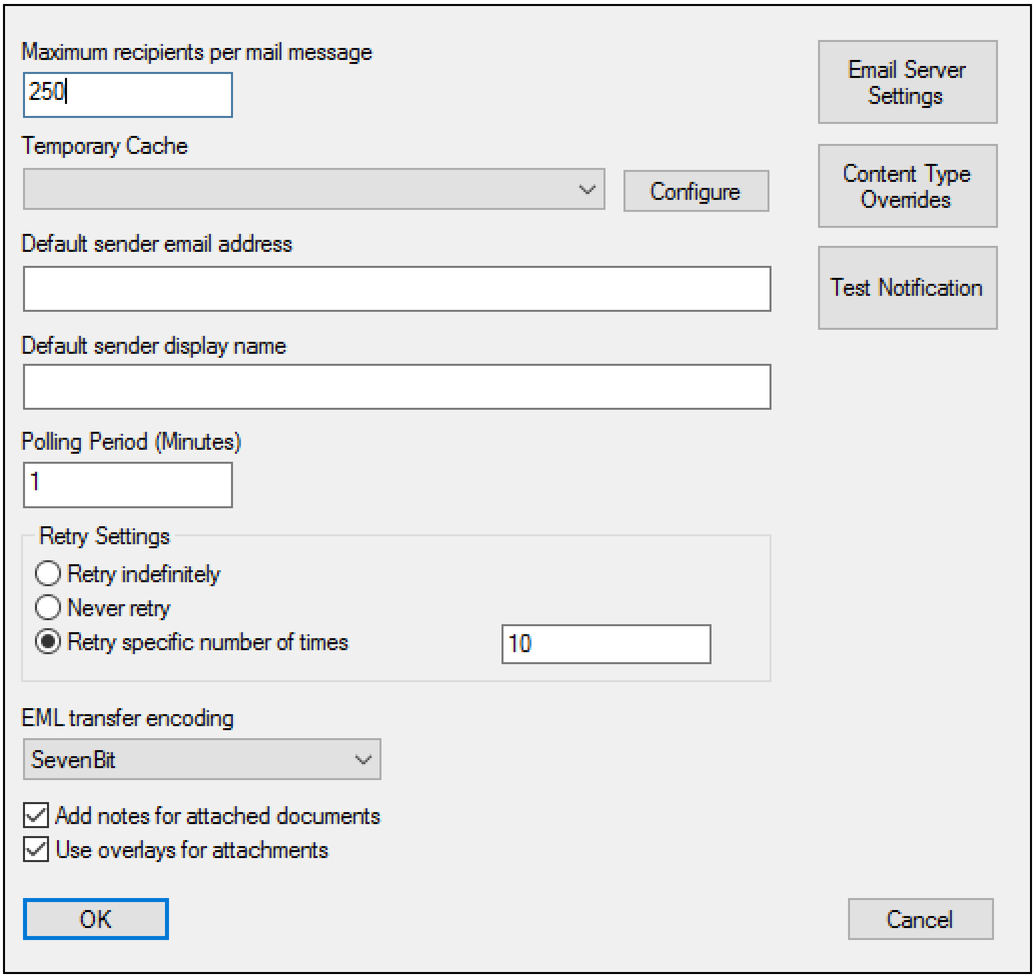
- Within a Core-based Workflow, the Application Pool Identity and Distribution Service account must have access.
- Both the Windows account that is accessing the OnBase Client as well as the Distribution Service account must have access.

A temporary file cache must be configured and associated with the Distribution Service under the following circumstances:

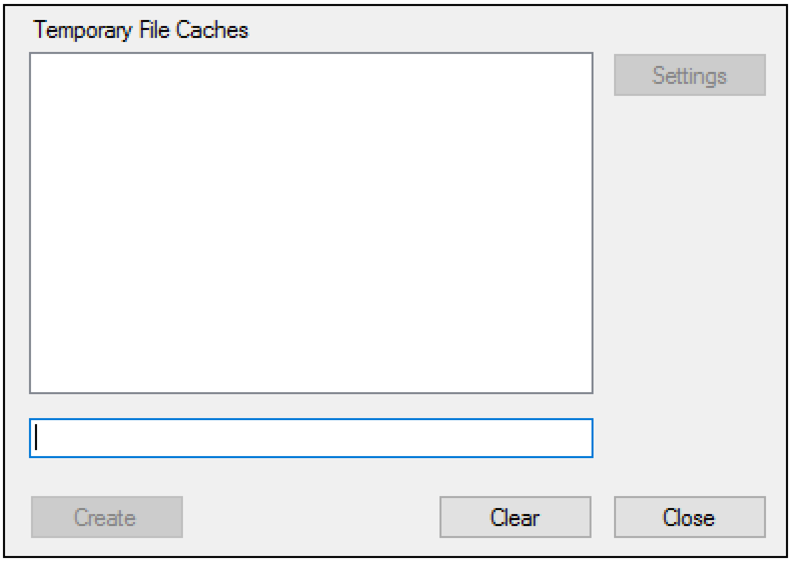
- When the Global Client Setting **Use Email Distribution Service for Document Distribution** is enabled.
- When using formatted or rich text notifications. In order to use formatted notifications, you must have Temporary Cache enabled and set up for the database you are using for testing purposes.
- When sending messages larger than 64000 bytes using WorkView | Case Manager.
- When using HTML WorkView | Case Manager notifications.

To create a temporary file cache:

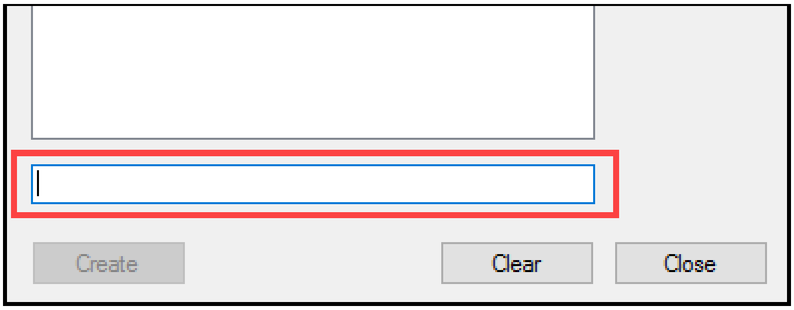
1. In the Configuration module, select **Utils | Distribution Service Settings**. The **Distribution Service Settings** dialog box is displayed.



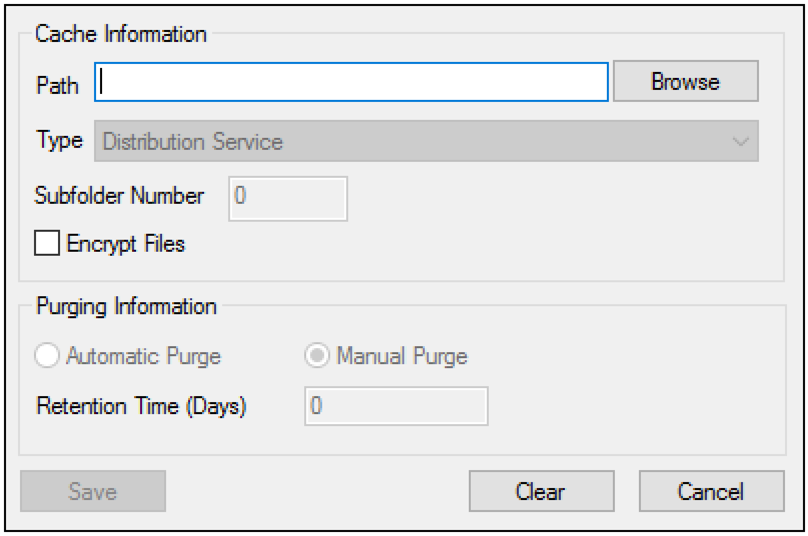
2. Click the **Configure** button next to the **Temporary Cache** drop-down list. The **Temporary Caches: Distribution Service** dialog box is displayed.



3. In the empty field, type the name of the cache you want to create.



4. Click **Create**. The **Cache Configuration** dialog box is displayed.



5. Enter the file path of the temporary file cache in the **Path** field, or click the **Browse** button to navigate to the location.

Note: The file you browse to must be a UNC Share, in which the application pool and the account running the Distribution Service have access to this share. The share name must not contain spaces.

The **Type** drop-down list is set to **Distribution Service** by default. This is the service that is automatically used when creating a temporary file cache.

Note: If the **Cache Configuration** dialog box is accessed from the **Distribution Service Settings** or **Integrated Office Viewer Settings** dialog box, the **Type** field is set to **Distribution Service** or **Microsoft Office Web Apps**, depending on the point of access, and cannot be changed. These temporary caches, created from the **Configure** button in the **Distribution Service Settings** dialog box or the **Integrated Office Viewer Settings** dialog box, are automatically associated with the desired functionality upon completion of configuration.

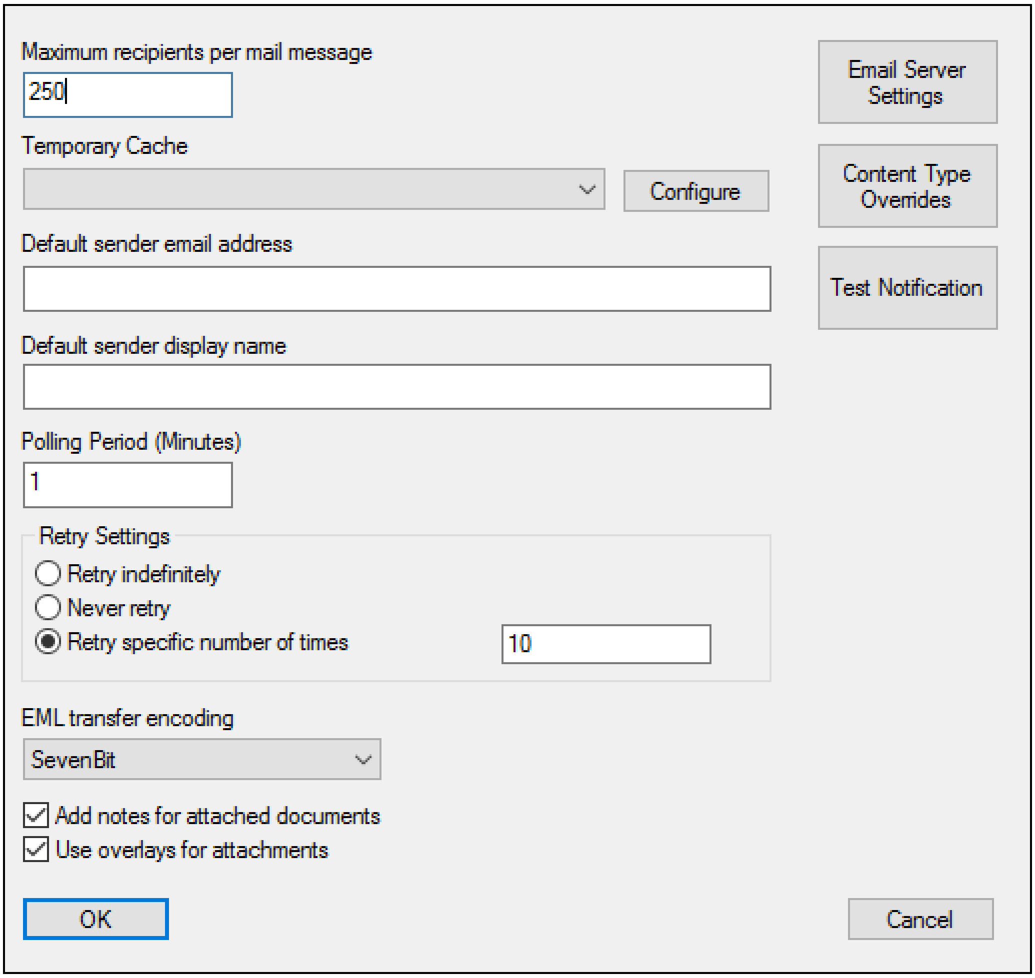
6. Select **Encrypt Files** to encrypt the temporary files. Encrypting the data prevents people from opening the files, which keeps the information more secure.
7. Click **Save**.

Note: Once a temporary file cache is configured, it must be associated with the Distribution Service. See Configuring Retry Settings on page 58 for more information.

Configuring Retry Settings

The Distribution Service can be configured to attempt to send notifications again upon a failure. To configure these settings:

1. In the Configuration module, navigate to **Utils | Distribution Service Settings.** The **Distribution Service Settings** dialog box is displayed:

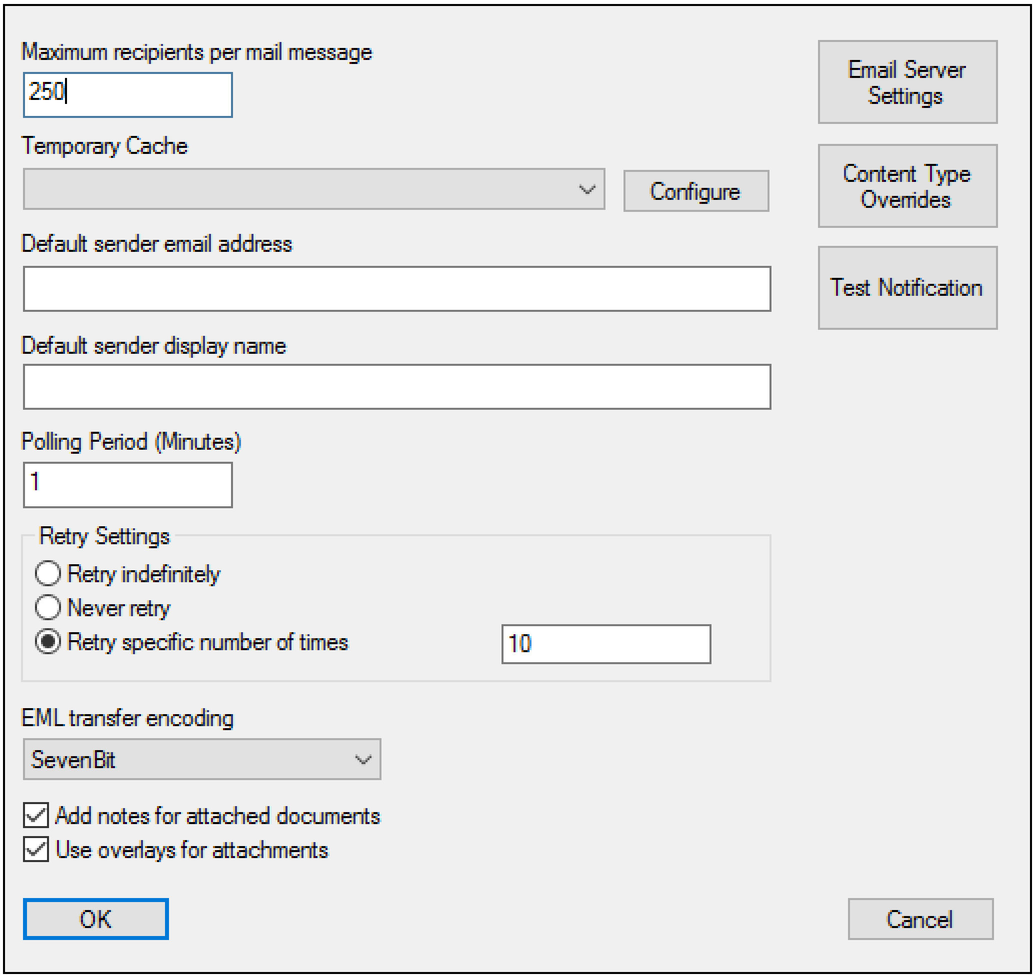


2. In the **Retry Settings** section, select one of the following options:
   - **Retry indefinitely -** The Distribution Service continuously tries to send a notification if a failure occurs.
   - **Never retry** - The Distribution Service does not attempt to send the notification if a failure occurs.
   - **Retry specific number of times** - The Distribution Service tries to send the notification until the specified number of attempts is reached. In the field provided, enter the number of attempts that you want the Distribution Service to make.
3. Click **Save**.

Configuring Maximum Recipients

A maximum number of recipients per each generated notification email message can be configured. This ensures that in the case of a long list of recipients, recipients are broken up and multiple emails are generated in order to prevent timeout errors. To configure a maximum number of recipients per email:

1. In the Configuration module, navigate to **Utils | Distribution Service Settings.** The **Distribution Service Settings** dialog box is displayed:



2. In the **Maximum recipients per mail message** field, enter the maximum number of recipients that a message should have. If the recipient list is longer than the value of this setting, emails are sent in multiple batches.

Note: If you do not want a maximum number of recipients per mail message, set the **Maximum recipients per mail message** value to **0**. This does not set a maximum number of recipients. A single message is generated for all recipients.

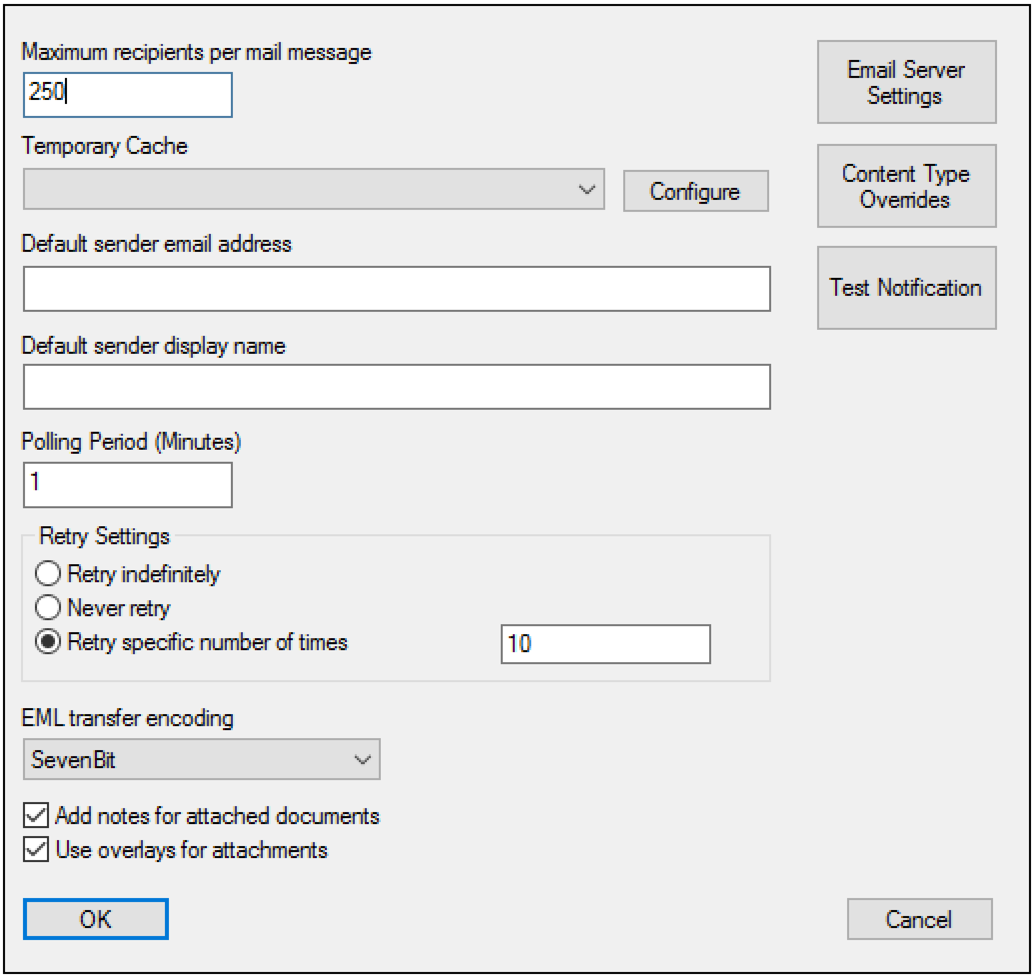
Configuring Default Sender Options

You can establish a default sender for any emails that are distributed using the distribution service. This can be used if you want to send emails using a generic account. For example, if you want to send general information to a group of people, you may want to set up an Information email account.

Note: The sender that displays is either the authenticated user or the sender of the request. If those are not available, then the default sender value is used.

To configure a default sender:

1. In the Configuration module, navigate to **Utils | Distribution Service Settings**. The **Distribution Service Settings** dialog box is displayed.



2. In the **Default sender email address** field, type the email address belonging to the sender you want listed as the default. For example, the sender email could be info@email.com.

3. In the **Default sender display name** field, type the name for the default sender. If this is to be a general information account, you may want to type Information as the default sender.
4. Click **OK**.

Displaying the User Who Triggered the Notification as the Sender

The Default Sender email address is configured in the OnBase Configuration module, using the Distribution Service Settings dialog box. See Configuring Default Sender Options on page 60 for more information.

The following progression is taken if authentication is not used:

- Initially, the sender who generated the notification will be used.
- If that value is null, then the Distribution Service's default sender address value will be used.
- If that value is null, then the user who generated the notification will be used as the sender.

Note: When displaying the user who triggered the notification as the sender, leave the **Default Sender** field empty.

Users who trigger notifications must have valid email addresses configured in OnBase. Otherwise, the notifications are not sent, and the message **Server Error: 501 5.5.4 Invalid Address** is displayed in the **Errors** tab of the Diagnostics Console.

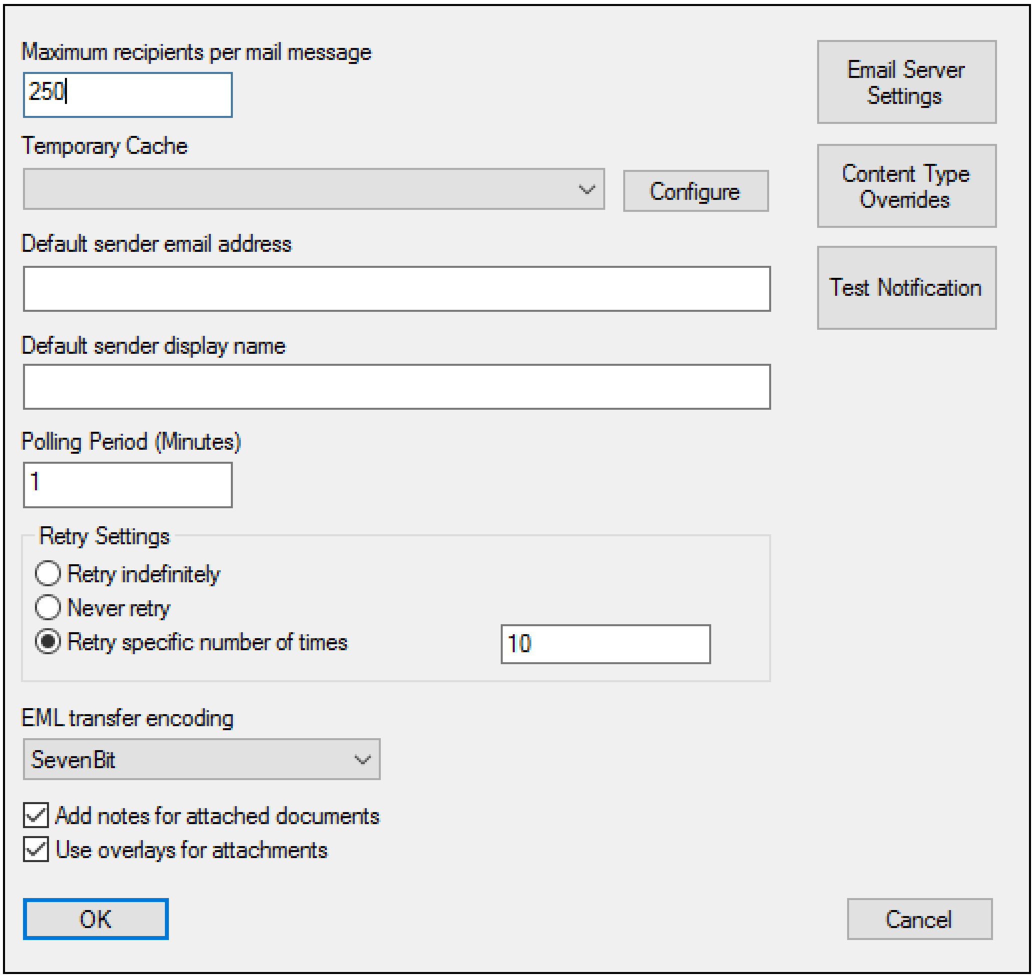
The **Default Sender** setting can be overridden by modules like Workflow and WorkView, which allow you to configure the sender address for notifications.

Configuring Attachment Options

If a document that has been attached to an email contains notes or overlays, you can configure the document to not include notes and overlays when the document is sent as an attachment.

To configure document options:

1. In the Configuration module, navigate to **Utils | Distribution Service Settings**. The **Distribution Service Settings** dialog box is displayed.



2. De-select the **Add notes for attached documents** check box to remove the notes from attached documents.
3. De-select the **Use overlays for attachments** check box to remove overlays from attached documents.
4. Click **OK**.

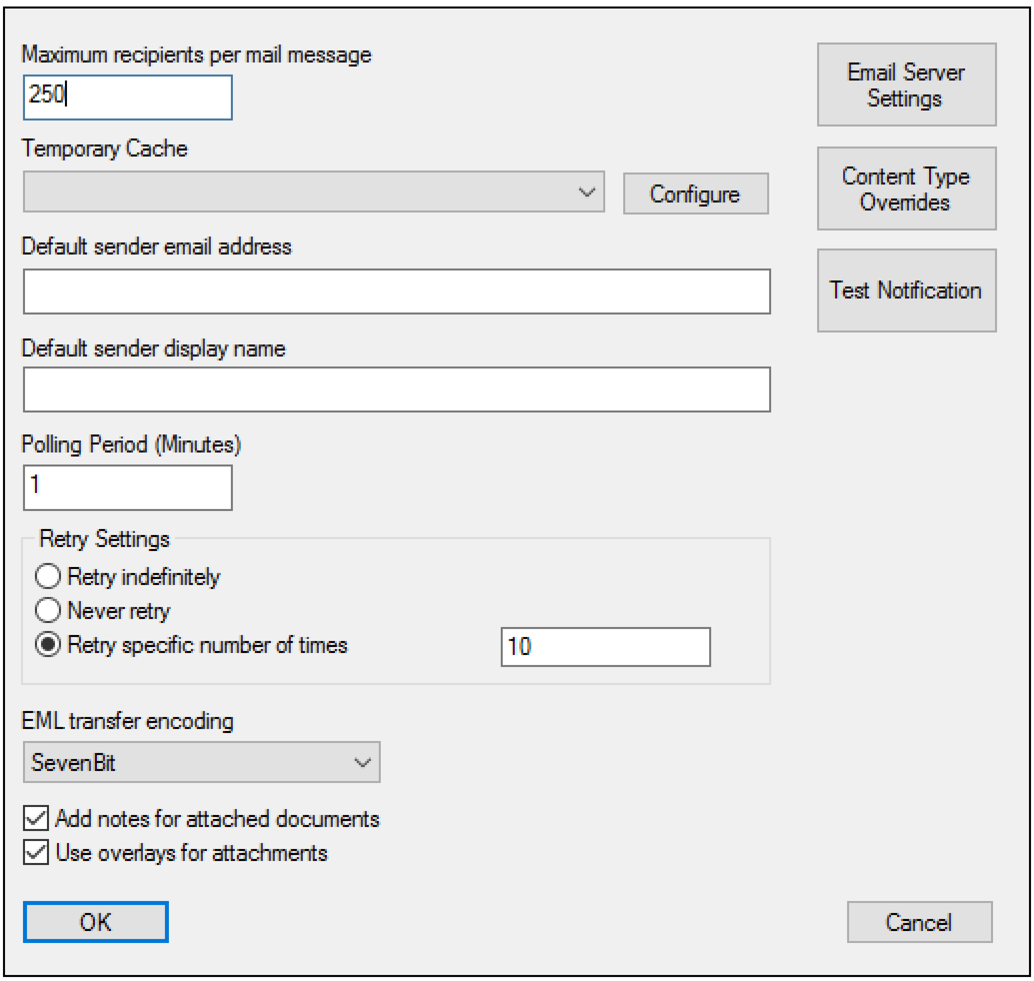
Configuring Email Server Settings

The Email Server Settings option provides the ability to configure the mail server to send emails. From this dialog box, you can specify an address for the server, the port number and other settings that are specific to the server. You can also require that emails are routed with an SSL encrypted connection.

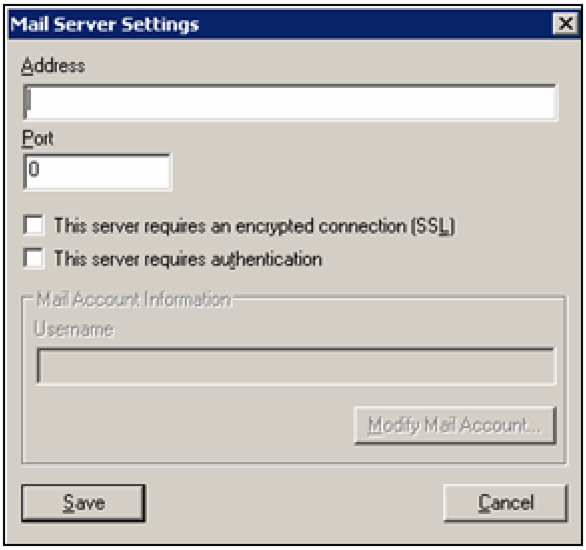
Note: The SmtpClient class for routing emails using SSL encryption only supports the SMTP Service Extension for secure SMTP over Transport Layer Security as defined in RFC 3207, which is published by the Internet Engineering Task Force (IETF). In this mode, the SMTP session begins on an unencrypted channel, then a STARTTLS command is issued by the client to the server to switch to secure communication using SSL.

To configure email server settings:

1. In the Configuration module, navigate to **Utils | Distribution Service Settings**. The **Distribution Service Settings** dialog box is displayed.

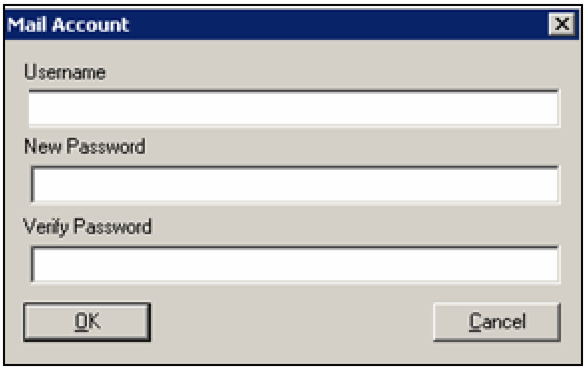


2. Click **Email Server Settings**. The **Mail Server Settings** dialog box is displayed.



3. In the **Address** field, type the address for the mail server.
4. In the **Port** field, type the port number that is used for the mail server.
5. Select the **This server requires an encrypted connection (SSL)** check box to require that the server has an encrypted SSL connection.

6. Select the **This server requires authentication** to validate that a mail account has been configured for the mail server. When this option is selected, the **Modify Mail Account** button is enabled. Select this button to display the Mail Account dialog box.



Enter a valid username and password in the **Username** and **New Password** fields. Re-enter the password in the **Verify Password** field, and then click **OK**.

Note: The user name must be formated as the following: email@domain.com.

When authentication is enabled, note the following:

- When replying to an email, the authenticated email (your email) is displayed in the From field.
- If the Default Sender field is populated, and authentication is enabled, the Reply to field is automatically populated with the request's sender when replying to emails.

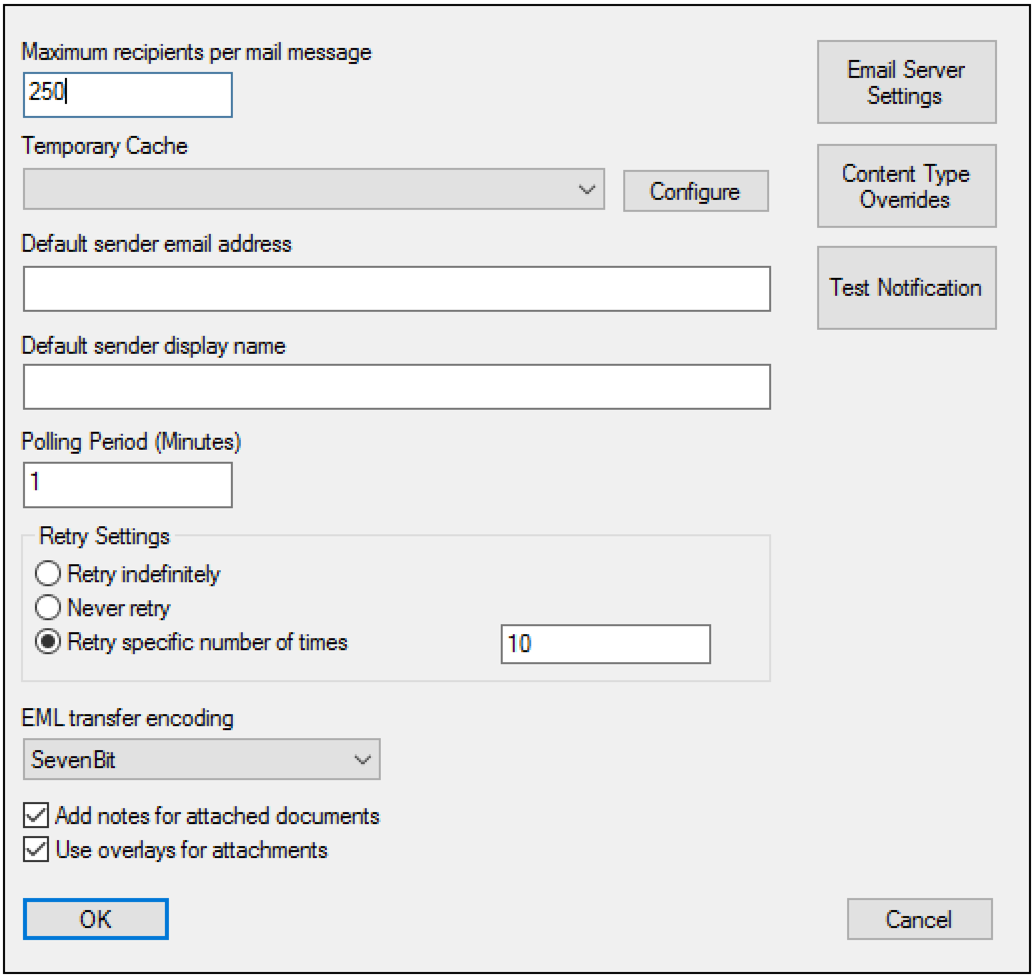
7. Click **Save** to save the mail server settings.

Generating and Sending Test Notifications

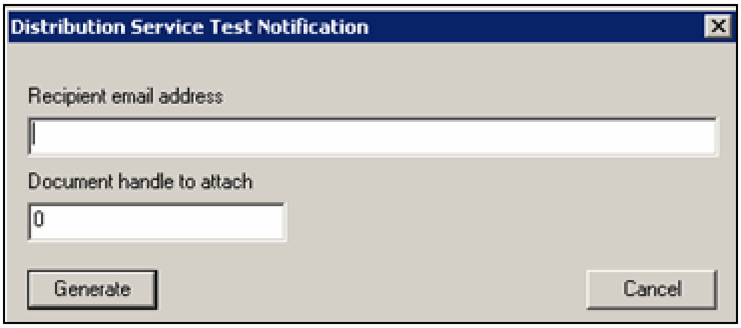
To ensure that the Distribution Service is configured properly, test notifications can be generated from the Distribution Service Settings dialog box.

To generate test notifications:

1. In the Configuration module, navigate to **Utils | Distribution Service Settings.** The **Distribution Service Settings** dialog box is displayed:



2. Click **Test Notification**. The **Distribution Service Test Notification** dialog box is displayed.



3. Enter a valid SMTP email address in the **Recipient email address** field.

4. If you want to attach a document, enter a document handle in the **Document handle to attach** field. The specified document will be sent as an attachment in the email.
5. Click **Generate**. The notification is sent when the Distribution Service is started. Check the recipient email mailbox to ensure the notification was sent.

Viewing Reports in the Unity Management Console

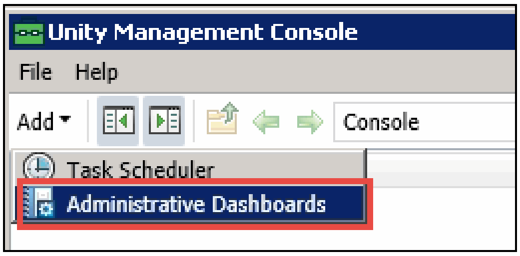
The Distribution Service Administrative Dashboard is available in the Unity Management Console. This dashboard allows you to view the status of emails that have been sent through the Distribution Service. Using the dashboard, you can view reports for the following:

- All Emails
- Successful Emails
- Failed Emails
- Pending Emails

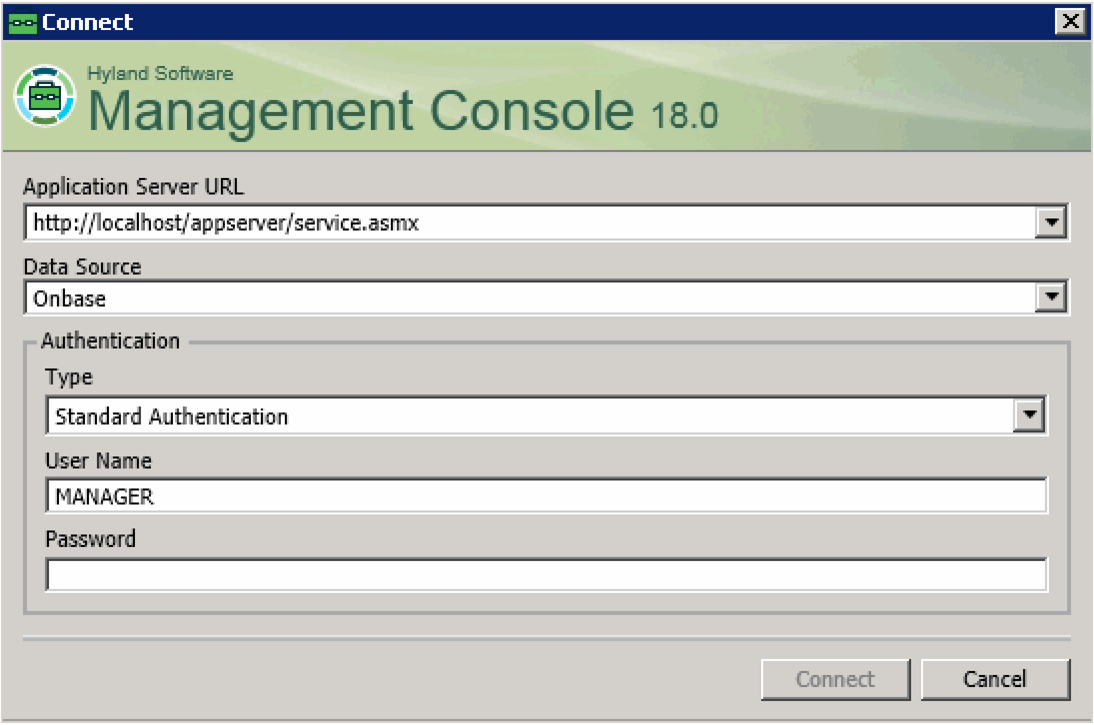
Before you can use the new dashboard, you must install the Unity Management Console. See the **Unity Scheduler** module reference guide for more information.

To add the Distribution Service Administrative Dashboard:

1. Open the Unity Management Console.
2. Click **Add | Administrative Dashboards**.

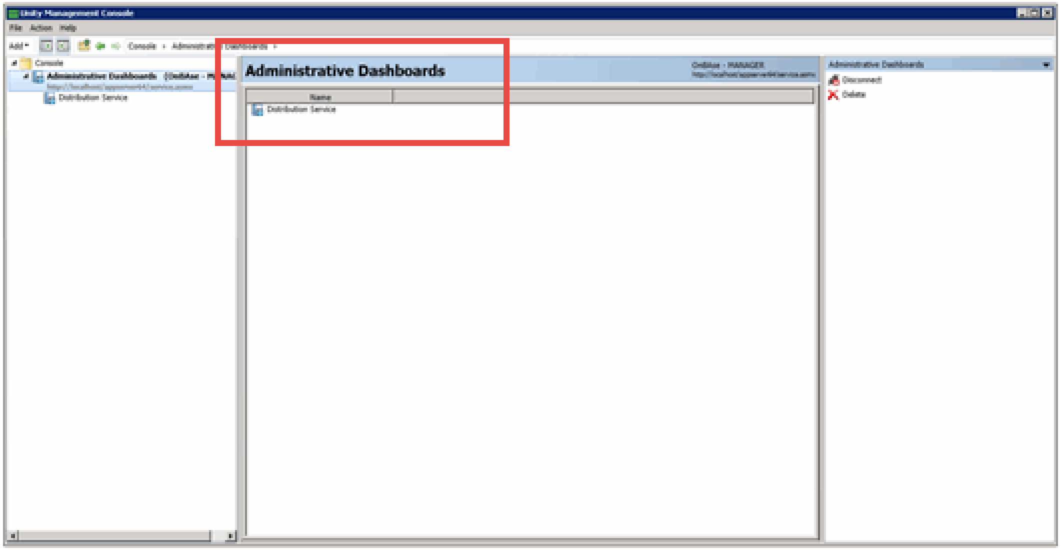


The **Connect** dialog box is displayed.



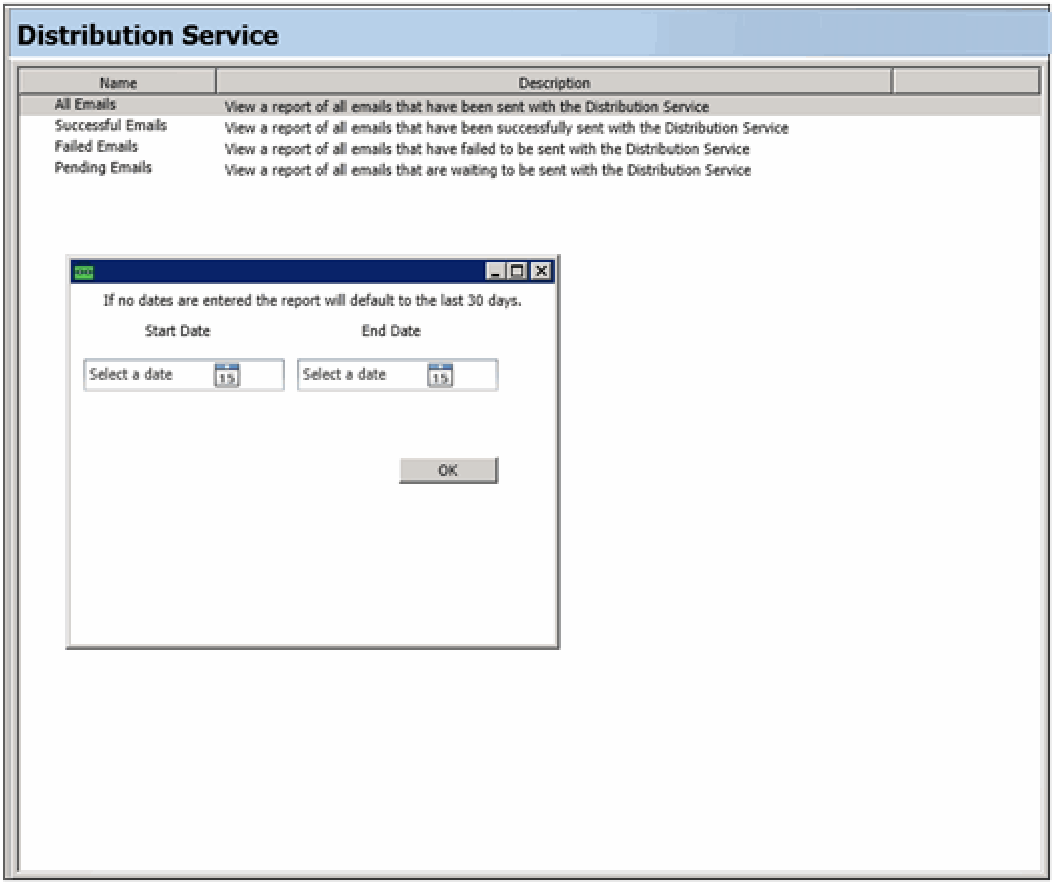
3. Ensure that the information provided in the fields is correct.
4. Enter your password in the **Password** field to authenticate the connection.

5. Click **Connect**. The **Distribution Service** dashboard is displayed in the **Administrative Dashboards** pane.



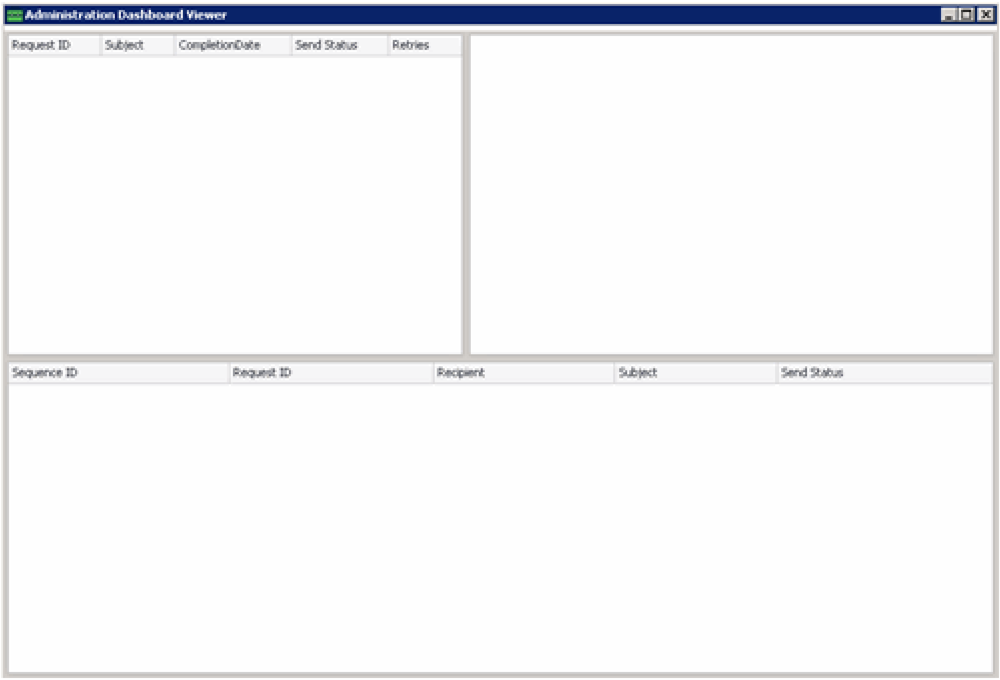
6. Double-click the **Distribution Service** dashboard.

7. Double-click a report to view one of the email report options. A date range dialog box is displayed.



8. Choose a date range from the **Start Date** and **End Date** pickers.

9. Click **OK**. The **Administration Dashboard Viewer** is displayed, listing information for any emails that fall into the category of the report you selected.



10. Click the **X** to close the **Administration Dashboard Viewer** window.

Troubleshooting

The following troubleshooting information may help you diagnose and resolve issues with the Hyland Distribution Service.

Logging Information to the Diagnostics Console

You can use the Diagnostics Console to troubleshoot Distribution Service issues. Diagnostics information is logged under the **Timer / Distribution Service** tab in the Diagnostic Console.

Note: For general information on diagnostics, see the Diagnostics Service reference guide or the Diagnostics Console help files.

When an **Email Sending** task is manually initiated from the Unity Management Console, the logging levels set in the Application Server's web.config file are respected. When an **Email Sending** task is automatically triggered by the Unity Scheduler, the logging levels set in the Unity Scheduler's app.config file are respected.

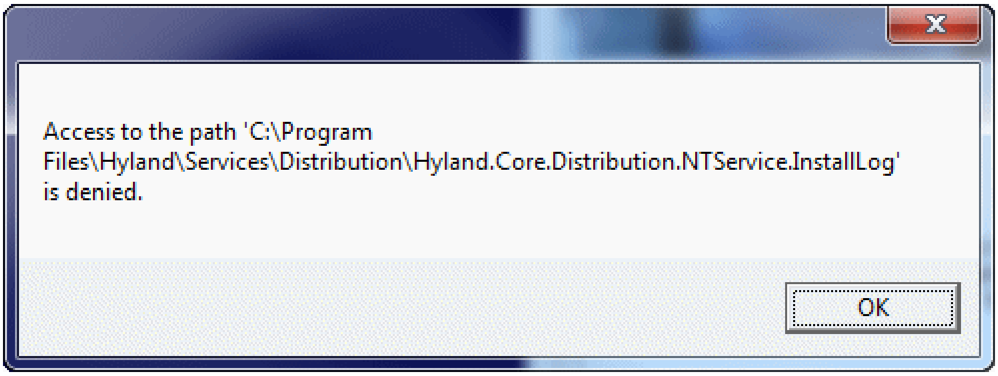
In either the Application Server's web.config file or the Unity Scheduler's app.config file, modify the logging level to activate logging. If logging is activated, it always occurs at the **Verbose** level. Setting the **minimum-level** key to different values will yield the results described below:

- If the line specifying the **minimum-level** is commented out, information about the Distribution Service is logged at the **Verbose** level.
- **Trace** - Information about the Distribution Service is logged at the **Verbose** level.
- **Verbose** - Logs important information and events regarding the Distribution Service.
- **Warning** - No Distribution Service information is logged.
- **Error** - No Distribution Service information is logged.
- **None** - No Distribution Service information is logged.

Note: If the Distribution Service sends an email without a specified **To** address, an SMTP server error displays on the **Errors** tab. The SMTP server sends Undeliverable Message notifications to the **From** address specified in the message template.

Access to the path...is denied

If you try to manually install or uninstall the Hyland Distribution Service on a server with Windows User Account Control (UAC) enabled, an "Access denied" message may be displayed.



To address this issue, run the Command Prompt as an administrator. Under **Start | Accessories**, right-click on **Command Prompt** and select **Run as administrator**.

For more information about how the User Account Control can affect OnBase deployments, see Windows User Account Control Statement on page 77.

Error Loading Document: Attachments Are Not Sent

When the Hyland Distribution Service sends emails with attachments, the body of the emails may say the following:

- ERROR LOADING DOCUMENT: Document Number: [#]

This error may occur because the account running the Hyland Distribution Service lacks privileges to the document on the OnBase disk group.

To resolve this issue, perform the following steps on the server where the Hyland Distribution Service is installed.

1. Using a **Run** dialog box, run **services.msc**.

   To do this, select **Start | Run**, type **services.msc** and click **OK**. The **Services** console is displayed.
2. Double-click **Hyland Distribution Service** from the list of services.
3. Click the **Log On** tab.
4. Under **Log on as**, select **This account**.
5. Type a valid domain user name and password that has access to the OnBase disk groups. This user account will be used to run the service.
6. Click **OK** to save your changes and close the properties dialog box.
7. Restart the Hyland Distribution Service.

Messages Are Not Sent

Messages may not be sent for multiple reasons. The following are general steps to troubleshoot the issue. Steps to address specific issues are provided in the following topics.

1. Ensure the Distribution Service Settings are configured correctly.
2. If there are any firewalls between the servers running the Unity Scheduler and the SMTP server, open the SMTP port to allow the traffic to pass through.
3. Verify proper credentials are used if using authentication.
4. Verify that your antivirus software is not configured to block the SMTP port.

Workstation Registration Not Found

When you run the Distribution Service, messages are not sent, and the following error is logged to the Diagnostics Console: **Workstation Registration not found for distribution server machine**.

This error is displayed because required OnBase components such as registry keys and the onbase32.ini file have not been created on the server running the Distribution Service.

To resolve this issue, log in to either the OnBase Client or the OnBase Configuration module from the server that is running the Distribution.

Cannot Create a Session Pool

If the Distribution Service is running but fails to send messages, the following error may be logged to the Diagnostics Console:

- Cannot create a session pool without a data source, user name, and password.

When this error occurs, do the following:

- Check the **Hyland.Core.Distribution.NTService.exe.config** file and ensure the **datasource**, **username**, and **password** parameters are specified correctly.
- Ensure the names of the parameters in the configuration file are spelled correctly, including case. Parameter names are case sensitive. For example, if **username** is spelled as **UserName**, the parameter is not loaded.

"No Count" Is On

If the Diagnostics Console reveals that notifications are being processed but are not being sent, you may need to turn off the No Count variable on your SQL Server. Please contact your solution provider for assistance.

Version Mismatch

If you find that messages are not being sent, you may be using a version of the Distribution Service that is incompatible with your current version of OnBase. If this is the case, an error is logged to the Diagnostics Console indicating that there is a database version mismatch. Ensure the Distribution Service is upgraded to the same version as the rest of your OnBase solution.

Message Content and Attachments Are Reversed

Some email clients do not properly handle content types for attachments with certain file formats. As a result, documents with these file formats are sent as the message text instead of as attachments, and the actual message text is sent as the attachment. If users receive emails where the message and the attachment are reversed, you may need to configure the Distribution Service to override the content type for those attachments' file formats.

Note: E-Forms are one example of documents with a file format that may be handled incorrectly. By default, the Distribution Service's configuration file is configured to override the content type on E-Forms, allowing them to be sent correctly as attachments.

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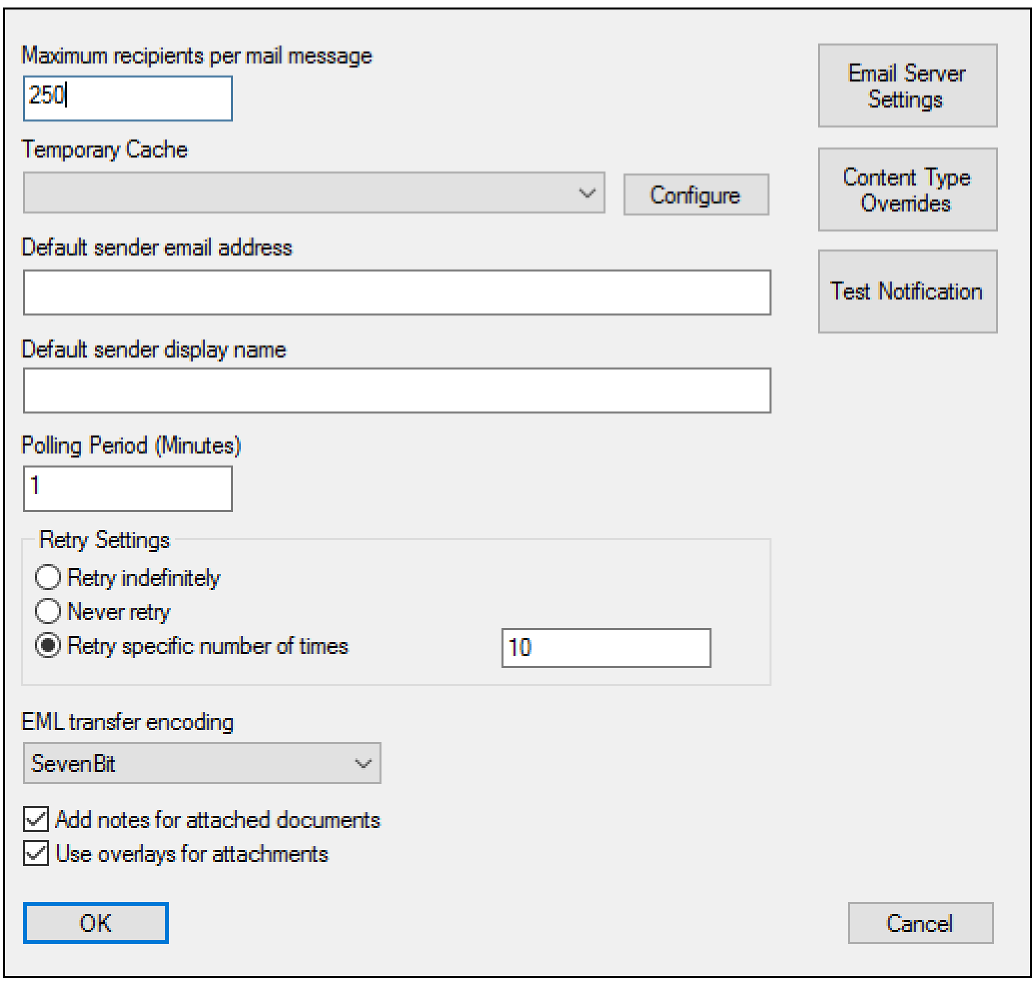
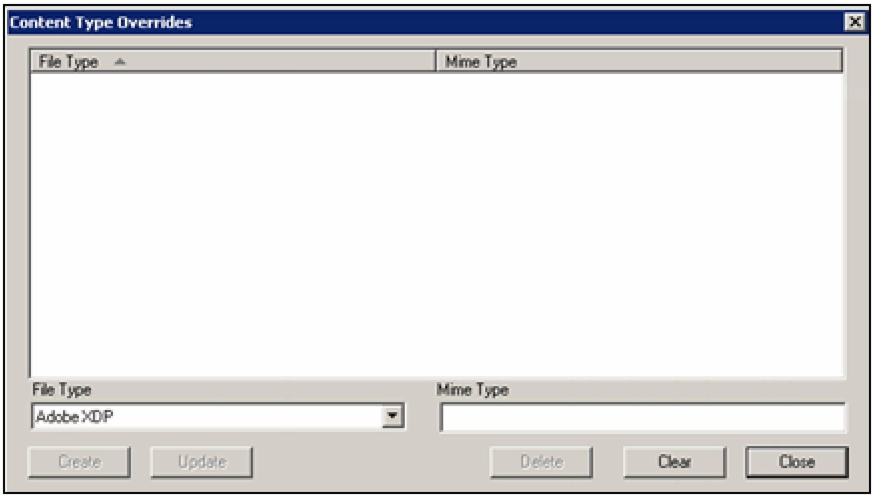
1. In the Configuration module, navigate to **Utils | Distribution Service Settings.** The **Distribution Service Settings** dialog box is displayed:



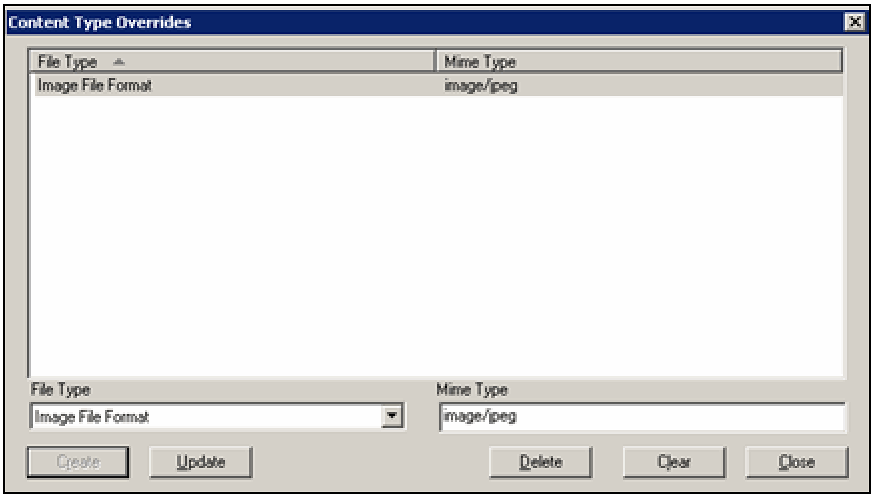
2. Click **Content Type Overrides**. The **Content Type Overrides** dialog box is displayed.



3. From the File Type drop-down list, select the file type that needs to be overridden.
4. In the Mime type field, enter the generic MIME type to label attachments that have the specified file format. Override options include:
   - application/octet-stream
   - application/pdf
   - application/rtf
   - application/soap+xml
   - application/zip
   - image/gif
   - image/jpeg
   - image/tiff
   - text/html
   - text/plain
   - text/richtext
   - text/xml

Note: If necessary, click **Clear** to clear the contents of the Mime Type field.

5. Click **Create**. The override is listed in the dialog box.



You can do any of the following if needed:

- **Update**. Click to update the override. The **Mime Type** field is activated, allowing you to modify the information.
- **Delete**. Click to delete the override.

6. Click **Close** to close the **Content Type Overrides** dialog box.

Unity Forms Limitations

- When Unity Forms are sent using the Distribution Service, section and page security configured on a Unity Form is not respected. The entire form is sent regardless of the security settings on the form.
- When Unity Forms are sent using the Distribution Service via the right-click **Send to** option, page tabs are not displayed in the form. Instead, the form's pages are displayed laterally.

Note: Unity forms are automatically sent as a .tif image when sent through the Distribution Service.

Windows User Account Control Statement

Hyland Software is dedicated to ensuring that OnBase is compatible with Windows User Account Control (UAC). UAC is a feature of Windows operating systems that was introduced with Windows Vista. It limits the ability of standard users to make global system changes to a workstation and prevents malicious software from making unauthorized changes to protected areas.

For details on UAC, refer to your Microsoft support information or see http://technet.microsoft.com/en-us/library/cc709691(WS.10).aspx.

You may encounter UAC in OnBase when:

- Installing or uninstalling OnBase, OnBase modules, or OnBase ActiveX controls.
- Copying, moving, or saving files to the Program Files directory, Windows directory, or another protected location.
- Modifying system-wide settings, such as the registry.
- Re-indexing a document or opening a scanned batch using published Internet Explorer from a Remote Desktop Server.

If Windows UAC is enabled, the above operations may prompt for administrator privileges or credentials, even if an administrator is currently logged on.

Collaboration Best Practices

The following best practice recommendations were assembled by a team of OnBase subject matter experts. They represent the accumulation of years of experience installing and configuring OnBase solutions.

The following recommendations are general in nature, and are applicable to most OnBase solutions and network environments. Depending on your solution design and your organization's needs, not all of the best practice recommendations listed below may apply to, or be recommended for, your OnBase solution.

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

Usage Best Practices

Use Document Level Discussion Threads With Workflow

If your system is licensed for Workflow and you want to use Collaboration with Workflow, it is considered a best practice to use Document Level Discussion Threads instead of Workspaces. By doing so, users will be able to participate in Discussion Threads while routing a document through a Workflow queue.

When Creating Discussion Threads

Enable Notifications

When creating a Discussion Thread, it is considered a best practice to enable the **Receive notifications** option by default.

When Creating Workspaces

Use Templates

It is considered a best practice to use a template when creating Workspaces, if a template that meets your needs is available. Using a Workspace template can save time when creating multiple similar Workspaces, and will also ensure consistency across those Workspaces.

Limit Workspaces by Subject

It is considered a best practice to keep Workspaces focused on a single subject. Instead of using a single Workspace for multiple subjects, you should create a separate Workspace for each subject. This helps maintain Workspace organization and usability.

Configure Attributes

It is considered a best practice to assign attributes when creating a Workspace from a template. This allows other users to locate your Workspace by searching for your configured attributes.

Use a Naming Convention

It is considered a best practice to include a prefix in Workspace names. This prefix indicates the type of Workspace that has been configured. For example, if the Workspace will be used to collaborate on multiple Document Types in the HR Document Type Group, use the HR prefix in the name of the Workspace. Using a common naming convention can help keep related Workspaces together when multiple Workspaces are visible, because Workspaces are sorted alphabetically.

Configure Accurate Workspace Descriptions

When configuring a Workspace, it is considered a best practice to configure a Workspace description that accurately describes the purpose of the Workspace.

Enable Notifications

When creating a Workspace, it is considered a best practice to enable the following notification options by default:

- User Membership Notification
- New Document Notification
- Document Revision Notification
- Message Post Notification

Disable Inactive Workspaces

It is considered a best practice to disable inactive Workspaces. This is because disabled Workspaces do not appear in the Workspace list, which helps make your Workspace list smaller and more useable.

Avoid Deep Thread Nesting

It is considered a best practice to avoid replying to posts over three or four levels deep. Instead, reply to the post one level above the post you wish to reply to. This will keep the discussion at three or four nested levels for maximum readability.

Configuration Best Practices

Configure Workspace Templates

When you will be creating multiple Workspaces that are very similar to each other, it is considered a best practice to configure Workspace templates. Using a Workspace template can save time when creating multiple similar Workspaces, and will also ensure consistency across those Workspaces.

Disable Thread Level Security

It is considered a best practice to enable the **Disable Thread Level Security** option. When this option is selected, users will be unable to configure security settings for each Discussion Thread. Instead, Discussion Threads will be restricted based on Document Type User Group settings (i.e., users that cannot retrieve a document will be unable to access that document's Discussion Threads).

If you disable thread level security, users will not have to update Discussion Thread security settings every time a new user or user group is added to your OnBase solution.

Configure User Group Security

When applying security to a Discussion Thread or Workspace, it is considered a best practice to use user groups when possible.

OnBase®
Foundation EP5

Collaboration

User Guide

Foundation EP5

Overview

This section describes all options available in the Collaboration module.

Note: Depending on your system's configuration, you may not have access to all settings. See your system administrator for details.

Collaboration can be used in the OnBase Client, the Web Client, or the Unity Client. This section contains the following topics:

- Definitions on page 83
- System Interaction on page 84
- Usage - Web Client on page 90
- Usage - Client on page 152
- Usage - Unity Client on page 233

Definitions

The following terms are commonly used in the Collaboration module.

Post

A post is the initial communication that begins a Discussion Thread, or a reply to a communication in the Discussion Thread. Not all users have the rights to create posts to a Discussion Thread. Once added, posts cannot be deleted. You cannot delete a post, even if you are the creator of the post.

Discussion Thread

A Discussion Thread is a discussion that provides the ability for all users invited to the discussion to participate in the form of viewing, replying, and receiving email notifications. Discussion Thread security is user-based, so different users can have different levels of privileges for the Discussion Thread. Discussion Threads can be applied to OnBase documents, E-Forms, WorkView Objects, or can be used stand-alone in a Workspace.
Once added, Discussion Threads cannot be deleted. You cannot delete a Discussion Thread, even if you are the creator of the Thread.

Note: Discussion Threads cannot be created on E-Forms that were not submitted into OnBase.

Workspace

A Workspace is a central location in which to store multiple Discussion Objects for the purpose of collaborating. Discussion Objects consist of Discussion Threads, relevant documents or WorkView Objects from OnBase. Workspace security is user based, so different users can have different levels of privileges for the Workspace.

WorkView Object

A WorkView Object is a specific WorkView interaction belonging to a class. Each object has its own set of attribute values. For example, a dispute over a specific invoice can be an object. Objects are created by users in the WorkView client, not during configuration, and consist of pertinent data.

- **Attribute**: Information that further defines a class. For example, Vendor Name, Vendor Address, Status, Accounts Payable clerk name are all potential attributes for a class. Attributes can be used to define filter columns and criteria. For example, Accounts payable issues can be accessed based on issue status.
- **Class**: A category of items to be tracked within WorkView. For example, Accounts Payable Issues.

System Interaction

The following describes other OnBase features and modules that interact with Collaboration. Please refer to the module's own Module Reference Guide if more information is necessary.

Agenda Manager

Collaboration functionality is available in the Agenda Manager. For more information, see the Agenda Manager help files.

EDM Services Considerations for Collaboration

EDM Services can be accessed through the Collaboration module.

EDM Services Considerations for Collaboration in the Web Client

If licensed for EDM Services, you can utilize several functions of the EDM Services module from a Workspace in Collaboration including the following:

- Adding reference documents to the EDM Briefcase
- Checking out documents to the EDM Briefcase

To add a reference document to the EDM Briefcase:

1. Select **Collaboration** from the main drop-down menu.
2. Select a Workspace that contains documents (i.e.: Microsoft Word and Excel documents, Text format).

3. Right-click on the document in the results list.
4. Select **Briefcase | Add Document as Reference**.

To check out a document in a Workspace to the EDM Briefcase:

1. Select **Collaboration** from the main drop-down menu.
2. Select a Workspace that contains documents (i.e.: Microsoft Word and Excel documents, text format).
3. Right-click on the document in the results list.
4. Select **Briefcase | Check Out Document**.

See the EDM Services online Help or Module Reference Guide for additional information regarding the EDM Services and the EDM Briefcase.

Note: The Briefcase option is not available in HTML-Only Mode of the Web Client for Collaboration.

Workflow Considerations for Collaboration in the Web Client

If licensed for Workflow, you can utilize several Collaboration functions within the Workflow module from a Workspace in Collaboration including the following:

- Creating a new Workspace
- Creating a new discussion
- Viewing all posts related to the Workflow document
- Adding the document to a Workspace

To perform one of the above options, right-click on the document in the Workflow queue results list and select **Collaboration** and one of the following options:

- **Create New Workspace**
- **Create New Discussion**
- **View All Posts**
- **Add to Workspace**

You may also right-click on the document in the Document Viewer to perform the same function.

You can also use the **Create Collaboration Workspace** action to create a Collaboration Workspace based on a selected **Collaboration Template**.

Note: You cannot right-click on an ODMA-compliant document in its Viewer (for example: Microsoft Word or Excel documents). You can only right-click from the Workflow results list.

See the Workflow online Help or Module Reference Guide for additional information regarding the Workflow options.

EDM Services Considerations for Collaboration in the Client

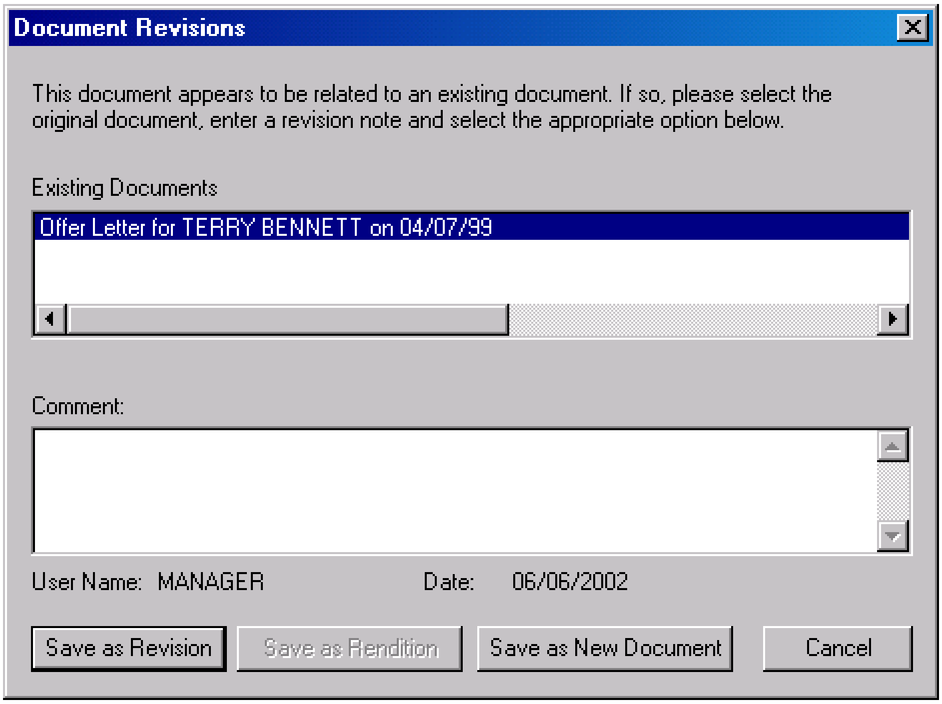
If licensed for EDM Services, you can utilize several functions of the EDM Services module from a Workspace in Collaboration from a Workspace including the following:

- Creating a revision of documents
- Adding reference documents to the EDM Briefcase
- Checking out documents to the EDM Briefcase

Creating a Revision of a Document

After making changes, click on the icon in the upper left corner, which is the document caption menu icon, to display the **System** menu.

The **Document Revisions** dialog displays.



To save a revision of the current document, enter in a comment in the **Comment:** edit box and click **Save as Revision**. The document is saved back into OnBase as a revision.

To save the document as a new document, select the **Save as New Document**. The **Import Document** dialog box displays.

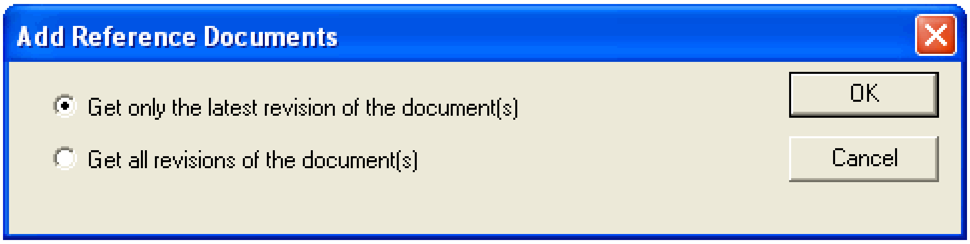
Note: If you are not licensed for EDM Services, you will not be prompted to overwrite the current document you made changes, and not add a revision.

Adding Reference Documents to the EDM Briefcase

EDM Briefcase allows you to add documents to the reference documents tab of the standalone briefcase without checking them out in both the OnBase Client and OnBase Web Client platforms.

- These documents become a read-only copy and are used for reference only.
- The OnBase document will not be read-only.

1. Right-click on a document from the document list.
2. Select **Briefcase | Add Document as Reference**.
3. The **Add Reference Documents** dialog box is displayed.



4. Select the **Get only the latest revision of the document(s)** radio button if you wish to only retrieve the last revision made.
5. Select **Get all revisions of the document(s)** radio button if you wish to retrieve all revisions of the document.
6. Click **OK**.

The document is now stored in the **Reference Documents** tab of your EDM Briefcase.

Note: Depending upon your user rights to view revisions or versions, the **Revision** column of the **Reference Documents** tab will display the latest revision number or the latest stamped version number.

Checking Out Documents to the EDM Briefcase

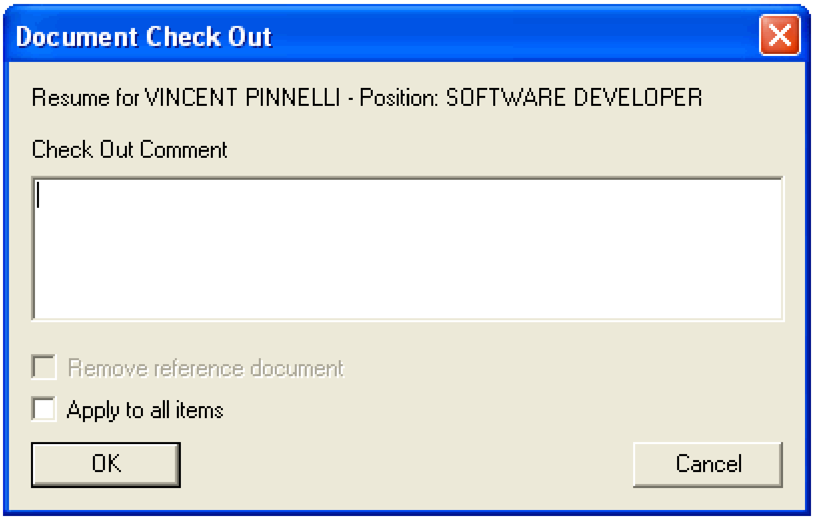
You may check out documents from OnBase and work on them even after you have logged out of OnBase. For example, you may check out a document and save it to your briefcase for overnight editing. Documents can be checked back in during the next OnBase session.

Before you can check out documents from your system, ensure that you have the **Check In/ Check Out Prerequisites** in place.

Check out a document from OnBase as follows:

1. Retrieve a document such as Word, Excel or PowerPoint.
2. From the document list, right-click on the document.

3. Select **Briefcase | Check Out Document**. The **Document Check Out** dialog box displays.



Note: If the **Check Out** option is not available, verify that you have all needed prerequisites.

4. The location for document storage defaults to the path you saved in your standalone briefcase.
5. Enter an optional **Check Out Comment** and click **OK**.

See the EDM Services online help or Module Reference Guide for additional information regarding EDM Services and the EDM Briefcase.

Workflow Considerations for Collaboration in the Client

If licensed for Workflow, you can utilize several functions of the Workflow module from a Workspace in Collaboration including the following:

- Create a new Workspace
- Create a new Discussion Thread on a document
- View all posts related to the Workflow document
- Send the document to Workspace
- Attach the document to the current Discussion Thread

To perform one of the above options, right-click on the document in the Document Viewer or Workflow Inbox, and select **Collaboration** and one of the following options:

- **Create New Workspace**
- **Create New Discussion**
- **View All Posts**
- **Add to Workspace**

- **Attach to Current Post**

Note: In order to use the **Attach to Current Post** right-click menu command, the **Create Discussion Thread** or **Post Reply** dialog boxes must be open. For more information, see Applying Security Settings to a Discussion Thread on page 209.

Note: You cannot right-click on an ODMA-compliant document in its Viewer (Example: Microsoft Word or Excel documents.) You can only right-click from the Workflow results list.

See the Workflow online help or Module Reference Guide for additional information regarding the Workflow options.

Using OnBase Studio

The OnBase Studio utility allows you to utilize the following Collaboration functionality:

- Create Collaboration Workspaces
- Create Discussion Threads

For more information on these Workflow Actions, see the **Workflow** documentation.

Usage - Web Client

The benefit of the Web Client Collaboration module is that it provides the ability for remote teams to collaborate on projects using Workspaces or Discussion Threads attached to OnBase documents.

There are two basic types of usage for the Collaboration module:

- Workspace Collaboration
- Collaboration around a Document or WorkView Object

Note: These instructions describe using the Collaboration module in the Web Client. See Usage - Unity Client on page 233 for details on using Collaboration in the Unity Client or Usage - Client on page 152 for details on using Collaboration in the OnBase Client.

Workspace Collaboration

Workspaces provide the ability to have a central location in which to store multiple Discussion objects. Discussion objects consist of Discussion Threads, relevant documents or WorkView objects from OnBase.

You can set user rights at the Workspace level to control access to the Workspace. In addition, you can also set user rights at the thread level to further restrict access to Discussion Threads in the Workspace, or Discussion Threads attached to documents in the Workspace.

All Workspace activity can be broadcast using email notifications to Workspace members.

See the topics below for details on using the Workspace.

- For Using Workspaces, see page 91
- For Using Workspace Retrieval to Find a Workspace, see page 103
- For Creating a Workspace With a Template, see page 105
- For Configuring an Ad Hoc Workspace on page 112
- For Workspace Administrators, see page 119
- For Configuring Workspace Options, see page 119
- For User Options, see page 126
- For Creating a Workspace Discussion Thread, see page 130
- For Configuring Users for a Workspace Level Discussion Thread, see page 135
- For Adding Documents To a Workspace, see page 139
- For Removing Documents from a Workspace, see page 139

Collaboration around a Document or WorkView Object

Collaboration does not need to take place in a Workspace. You can create a Discussion Thread around a particular document or WorkView Object and invite specific users to take part in the discussion.

All Discussion Thread activity can be broadcast in the form of email notifications to users of the Discussion Thread.

See the topics below for details on using the document level Discussion Threads or using WorkView with the Collaboration module:

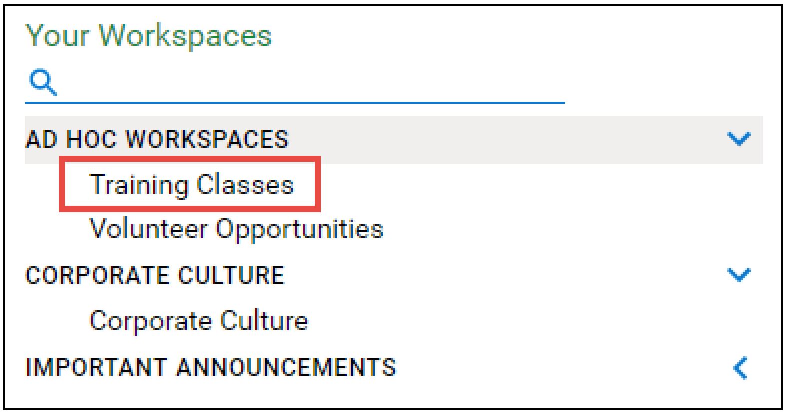
- Collaborating on Documents or WorkView Objects Independently of a Workspace, see page 96.
- Creating a Document Level Discussion Thread Independent of a Workspace, see page 141.
- View all Posts for a Document Independent of a Workspace, see page 97.
- WorkView Objects, see page 147.
- WorkView Objects or Documents Deleted from OnBase, see page 148.
- Configuring Users for a Document Level Discussion Thread, see page 145.
- Attach Document to WorkView object from Collaboration, see page 147.
- Copy Objects, see page 147.

Note: See the WorkView documentation for details on WorkView Objects.

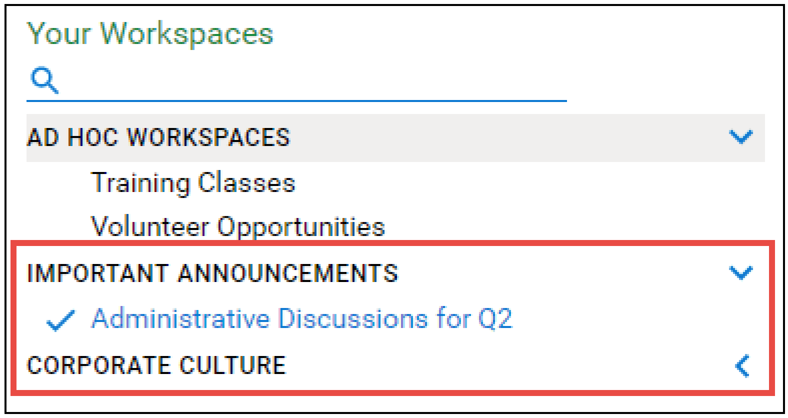
Using Workspaces

Workspaces are organized by the templates from which they were created. Documents not created with a template are listed as ad hoc Workspaces.

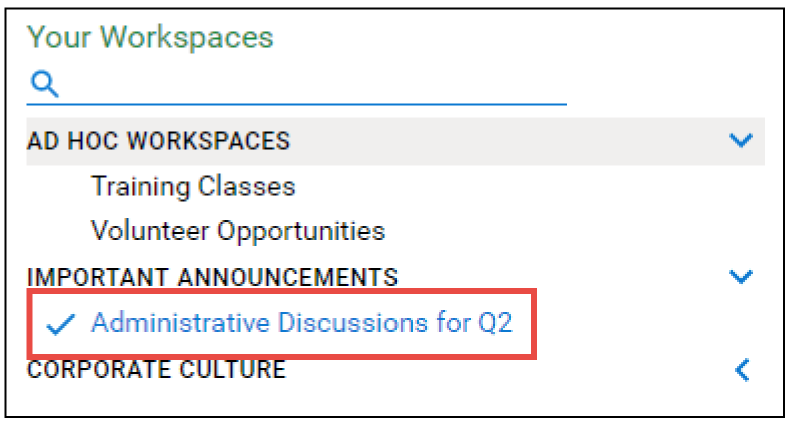
Ad hoc Workspaces are located under the **Ad Hoc Workspaces** heading. The **Training Classes** Workspace is an example of an ad hoc Workspace.



Two Workspace templates, **Corporate Culture** and **Important Announcements**, are also displayed.

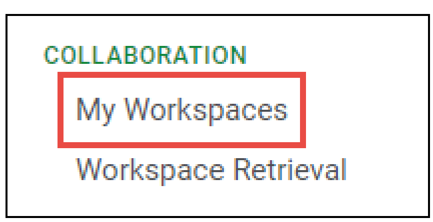


The **Administrative Discussions for Q2** Workspace is an example of a Workspace created from the **Important Announcements** Workspace template. Note how it is located hierarchically below the Workspace template from which it was created.

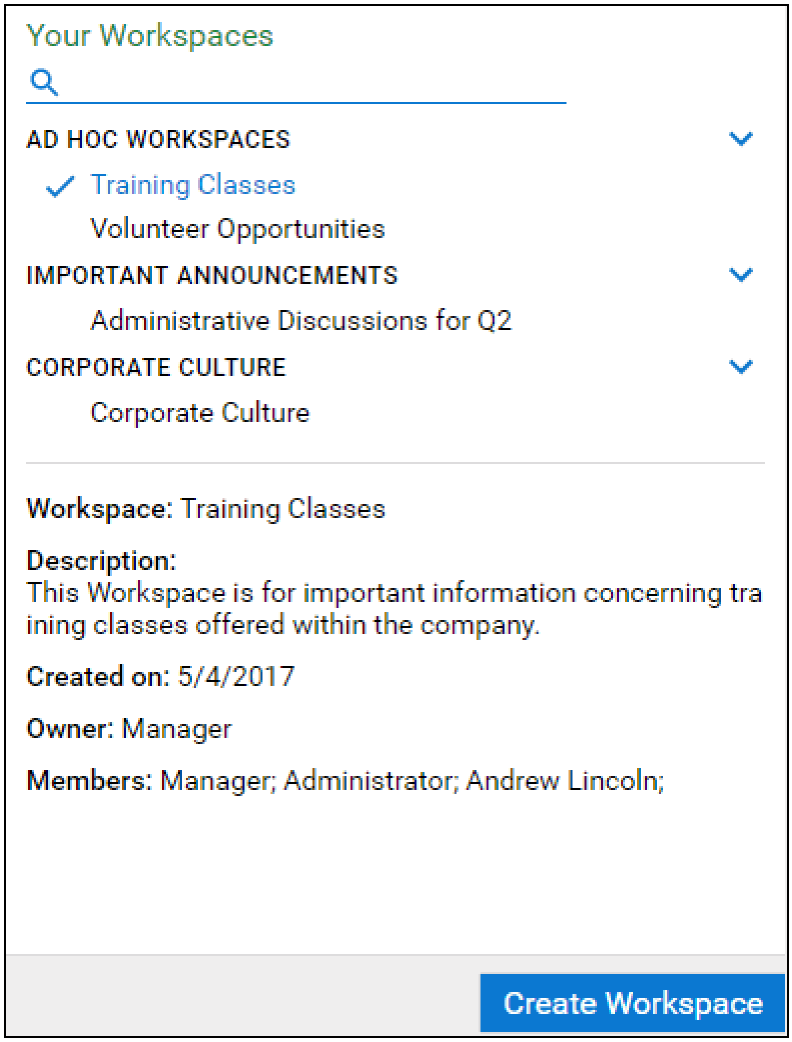


To open a Workspace:

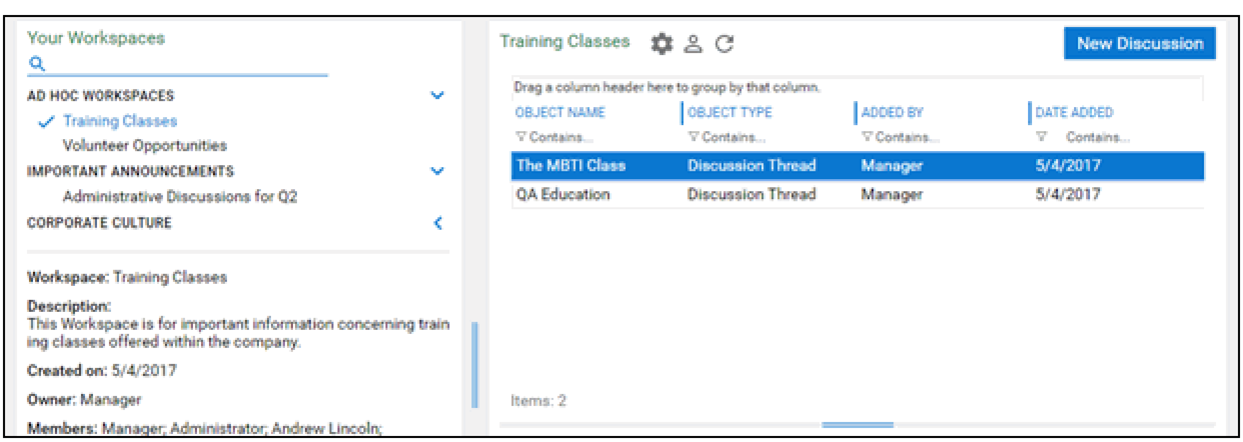
1. Click the **My Workspaces** option under **Collaboration** in the **Main Menu**.



2. Click the desired Workspace in the **Your Workspaces** pane.



3. The Workspace Discussion Objects are displayed in the Workspace pane, sorted by the date they were added to the Workspace.



Discussion Object Labels identify the type of Discussion Object as follows:

Discussion Object Label	Description
Object Name	Name of the Discussion Thread, WorkView Object or document (Auto-Name of the document)
Object Type	Indicates the type of object. There are three options: • Discussion • Document Thread • WorkView Object
Added By	User name of person that added the Object to the Workspace **Note:** (deactivated) will display next to the user name if the user who added the document has since been deleted from OnBase.
Date Added	Date the object was added.

4. The Collaboration panel also displays details about the Workspace.

Workspace: Training Classes

Description:
This Workspace is for important information concerning training classes offered within the company.

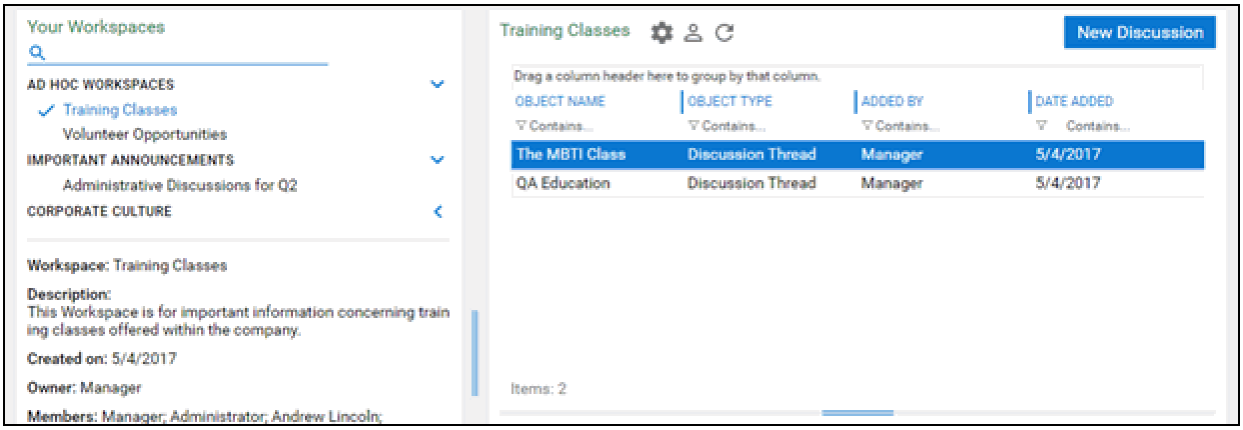
Created on: 5/4/2017

Owner: Manager

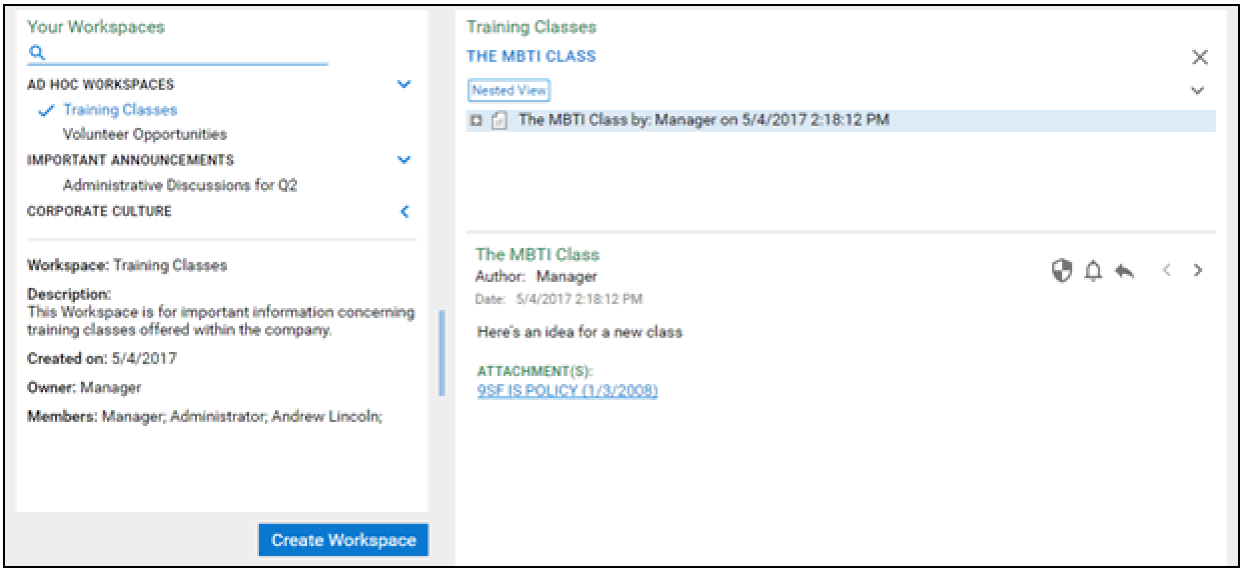
Members: Manager; Administrator; Andrew Lincoln;

Label	Description
Workspace	Workspace name
Description	Workspace description (as typed by creator)
Created On	Date the Workspace was created
Owner	User who created the Workspace
Members	Users that have rights to the Workspace

5. From the Collaboration Workspace, double-click on an object to open it.



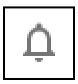
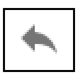
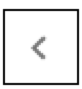
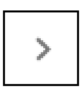
- If the **Object Type** is a document, the content displays in the lower panel. Documents function the same in the Collaboration viewer as they do in any other viewer in OnBase.
- If the **Object Type** is a WorkView Object, it will open in a separate viewer.
- If the **Object Type** is a Discussion Thread, the screen refreshes to display the Discussion Thread and its posts.



Note: This example displays the Discussion Thread in the Threaded view. Click the **Nested View** button to display the Discussion Thread in a Nested view.

The post displays along with the following descriptions and the post toolbar:

- Discussion Thread name
- **Author:** User that created the thread
- **Date:** Date the Discussion Thread post was created

Button	Description
	**Apply Security** See your system administrator for more information on Security settings. **Note:** Depending upon your system configuration, you may not have the **Apply Security** button. See your system administrator for questions regarding Discussion Thread level security.
	**Configure Notifications for this Thread** See your system administrator for details on this feature.
	**Reply**
	**Previous Post**
	**Next Post**

6. Depending upon your rights, you may not see all of the options in the toolbar.
7. Click **Reply** to reply to the post. A reply section is added to the Discussion Thread.
8. In the field under the **Subject:** field, type your reply.
9. Click **Save** to create a post.

10. Use the **Previous Post** and **Next Post** buttons to navigate through all posts in the Discussion Thread.
11. If you want to return to the Discussion Object list, click the **Back** button in the Collaboration Workspace toolbar.
12. Double-click on another object to view additional items in the Workspace.

Collaborating on Documents or WorkView Objects Independently of a Workspace

You can apply Discussion Threads to documents or WorkView objects, which are completely independent of a Workspace.

See the following topics for details on these types of Discussion Threads:

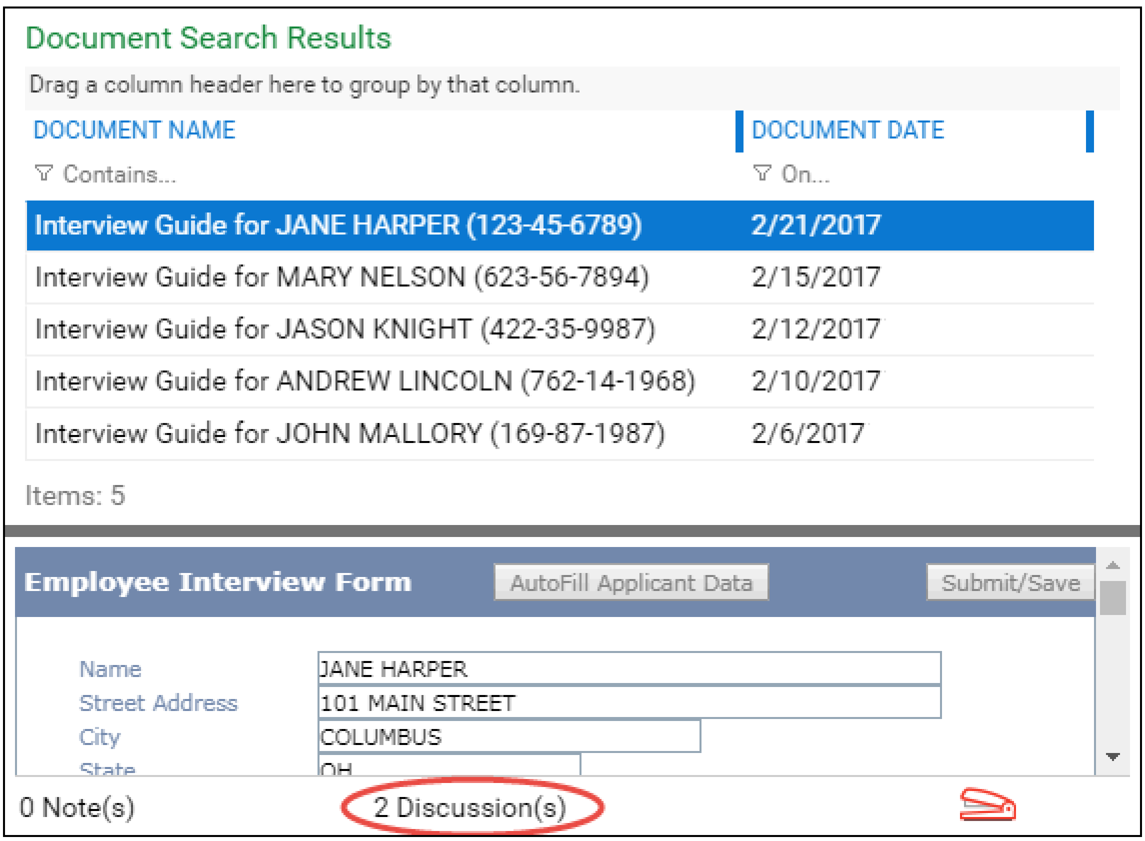
- Creating a Document Level Discussion Thread Independent of a Workspace on page 141
- Configuring Users for a Document Level Discussion Thread on page 145
- View all Posts for a Document Independent of a Workspace on page 97
- Attach Document to WorkView object from Collaboration on page 147

View all Posts for a Document Independent of a Workspace

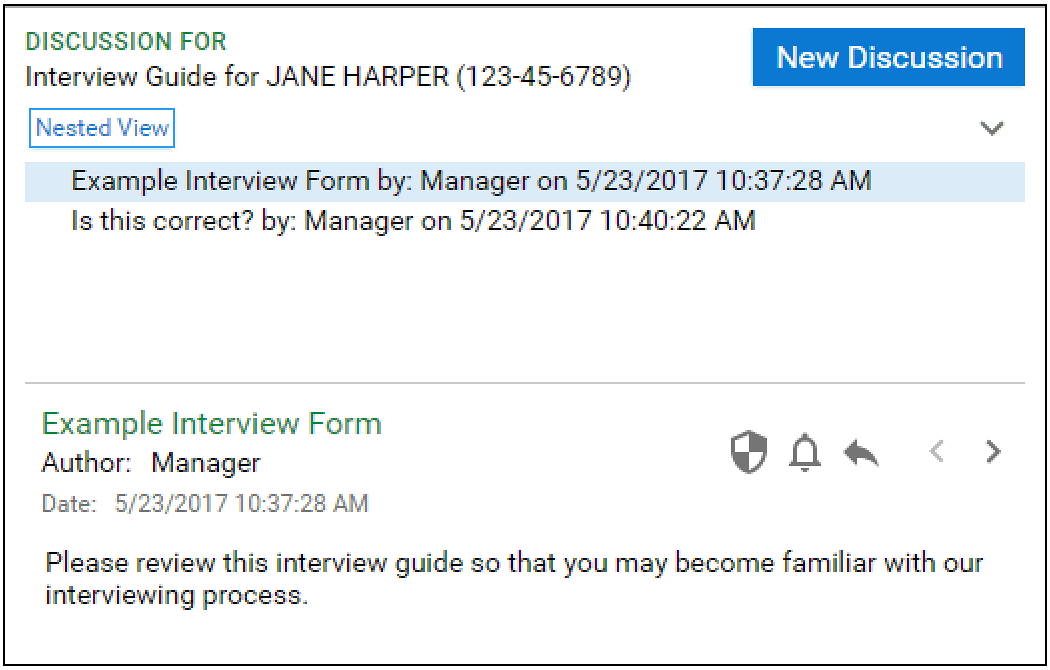
If a document contains a Discussion Thread independent of a Workspace, you view all posts to the thread from a Document Search Results List, or any open document.

1. From a Document Search Results List, or any open document, right-click and select **Collaboration | View all Posts**.

   From an open document, double-click on the status bar **Discussion(s)** indicator, which displays the number of posts applied to the document.



2. The **Display Discussion Threads** window is displayed.



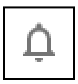
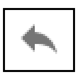
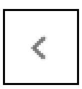
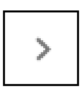
The example above displays the Discussion Thread in the Threaded view. Click the **Nested View** button to display the Discussion Thread in a Nested view.

Note: Only the first 75 characters of the document's name is displayed in the **Display Discussion Threads** dialog box header. If the document's name is longer than 75 characters, the entire document name can be viewed in the tool tip by scrolling the pointer over the dialog box's header.

3. Click a post to display it.

   The post displays along with the following descriptions and the post toolbar:

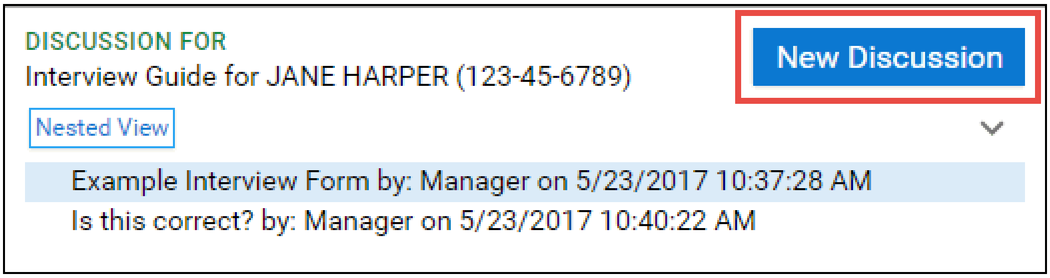
   - Discussion Thread name
   - **Author:** User that created the thread
   - **Date:** Date the Discussion Thread post was created

Button	Description
	**Apply Security** See your system administrator for more information on Security settings. **Note:** Depending upon your system configuration, you may not have the **Apply Security** button. See your system administrator for questions regarding Discussion Thread level security.
	**Configure Notifications for this Thread** See your system administrator for details on this feature.
	**Reply**
	**Previous Post**
	**Next Post**

4. Depending upon your rights, you may not see all of the options in the toolbar.
5. Click **Reply** to reply to the post. A reply section is added to the Discussion Thread. See Applying Security Settings to a Discussion Thread on page 209 for more information.
6. In the field under the **Subject:** field, type your reply. Posts can be 4096 characters or fewer.
7. Click **Save** to create a post.

8. Use the **Previous Post** and **Next Post** buttons to navigate through all posts within the Discussion Thread.

9. To create a completely new Discussion Thread on the same document, click the **Create New Discussion** button from the **Display Discussion Threads** toolbar.



Note: This example displays the Discussion Thread in the Threaded view. Click the **Nested View** button to display the Discussion Thread in a Nested view.

General and Default Options

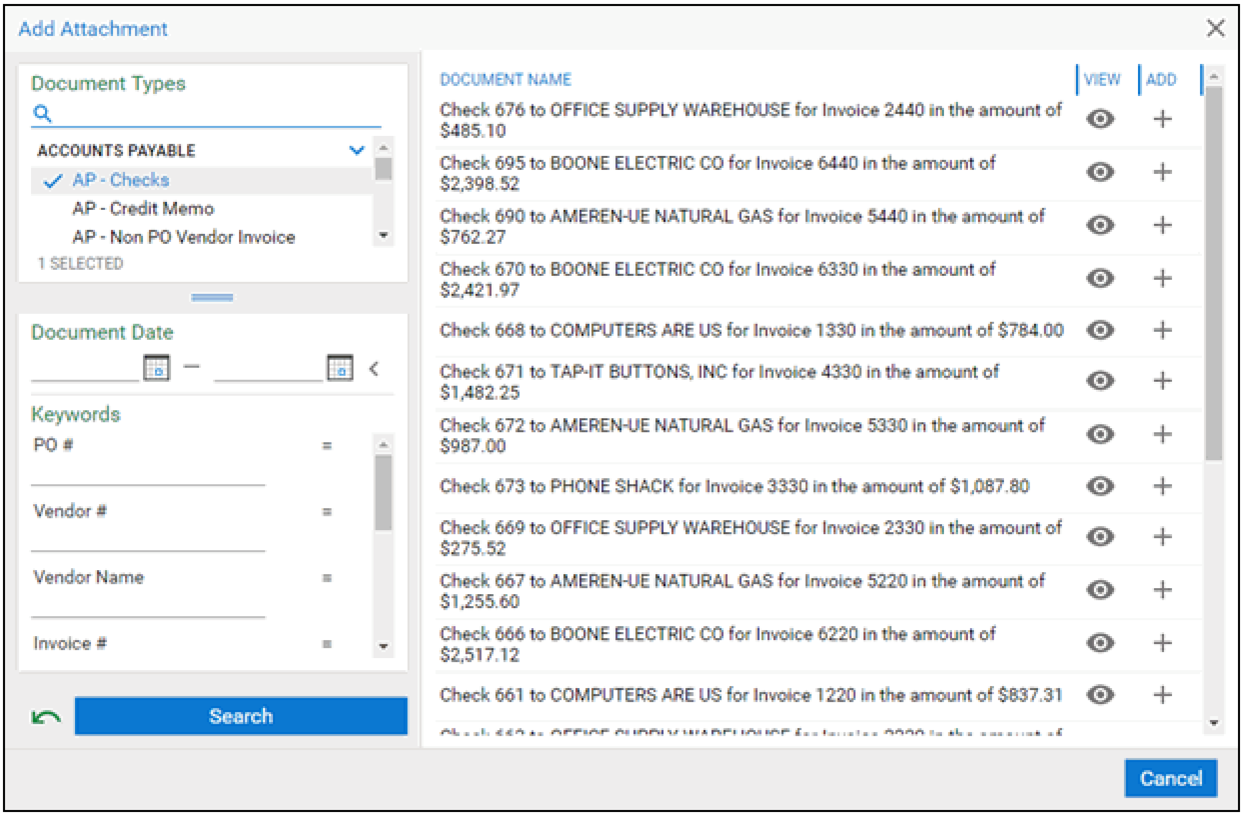
When creating a new Discussion Thread or creating a post, you may attach any necessary documents that exist in OnBase.

1. Create a Discussion Thread or reply to a post.
2. Click the **Add Attachment** button to add a document:

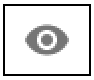
The **Add Attachment** dialog box displays.

3. Select one or more Document Type and click the **Search** button to retrieve a list of documents.

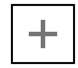
   To limit your search results, you may also enter Keyword Values in the Keyword Type fields.



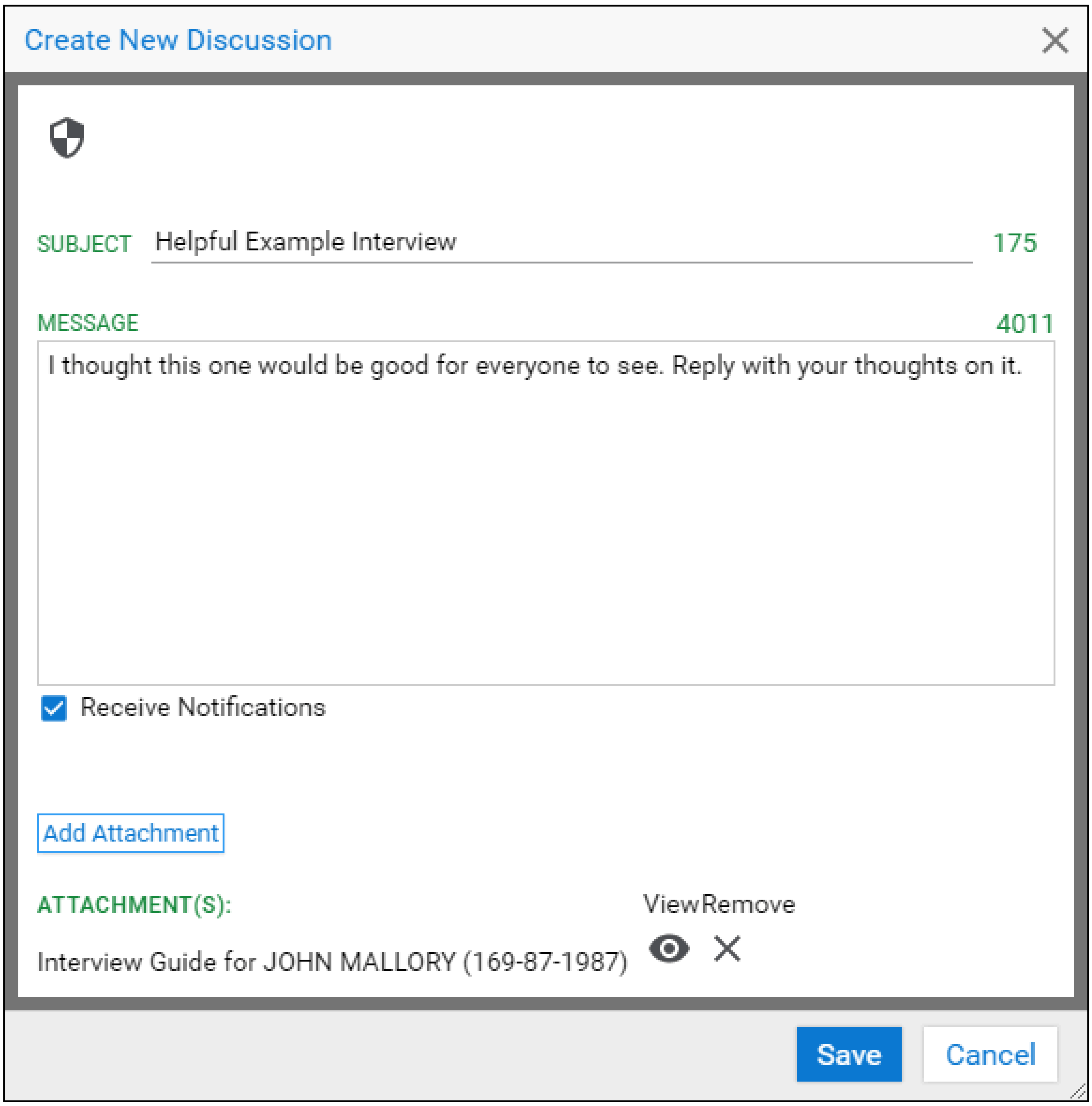
4. Select the **View Document** icon in order to view the document in a separate Document Viewer:



5. Select the **Add Document** icon to add the document.



Once the document has been added as an attachment, the **Create New Discussion** dialog box is displayed:



Note: If your OnBase solution is licensed for EDM Services and the document that has been added as an attachment is configured to allow multiple revisions, the Revision Number is displayed preceding the document name.

Click the **View** icon to view the document in a separate Document Viewer.

Click the **Remove** icon to remove the document from the **Attachment(s)** list.

6. Click the **Add Attachment** button and select any additional documents.
7. Click **Save**.

Viewing Attached Documents

Once a document has been attached to a post, you may view it by opening the post and clicking the **View Document** icon.

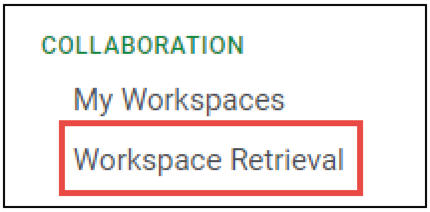
The document is opened in a separate Document Viewer.

Note: If a document is attached to a post or a Discussion Thread that is associated with a Workspace, then a user with rights to the Workspace will be able to view it regardless if he/she has rights to the Document Type. If a document is attached to a post or a Discussion Thread that was created at the document level, then a user must have rights to the attachment's Document Type to be able to view it.

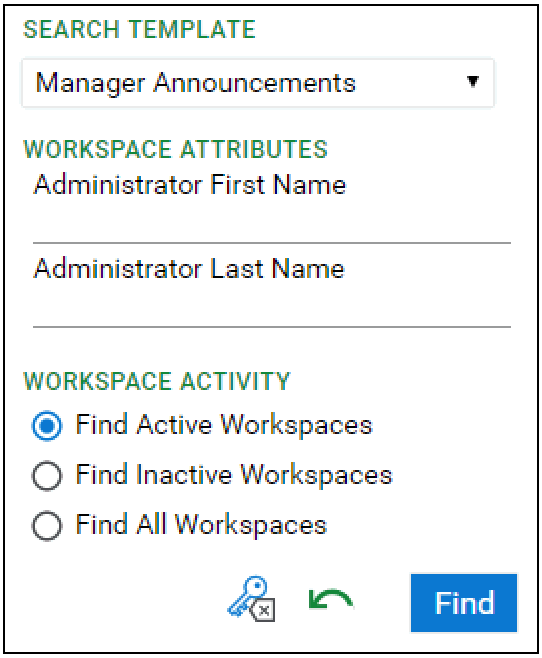
Using Workspace Retrieval to Find a Workspace

All users can search for a Workspace using Workspace Retrieval. OnBase will use the search criteria to search for and return results for only Workspaces to which that user belongs/owns. For ADMINISTRATOR/MANAGER it will return all Workspaces matching the criteria.

1. Click the **Workspace Retrieval** option under **Collaboration** in the **Main Menu**.



2. Select the template upon which the Workspace was created from the **Search Template** drop-down select list.



3. Type values into the **Workspace Attribute** fields that display. One of three data types is assigned to the Attribute field. Ensure you type the correct data type for the field. See the Workspace owner or administrator or the system administrator for questions regarding Attribute Data Types:
   - Alphanumeric fields - maximum of 250 characters
   - Date & Time fields - mm/dd/yyyy hh:mm:ss AM/PM

     If no value is provided, 1964-01-01 00:00:00.000 will be stored
   - Numeric - 2147483648 to 2147483647 is the valid range
4. Select one of the following types of Workspaces to find:
   - **Find Active Workspaces** - Select to find only Workspaces that are active
   - **Find Inactive Workspaces**—select to find only Workspaces that are inactive
   - **Find All Workspaces** —select to find both active and inactive Workspaces
5. Click **Find**. The Workspaces matching the search criteria display. 

Wildcard Options for Workspace Retrieval

Alphanumeric characters are only supported for a wildcard search (date/time and numeric data types are not supported for wildcard search).

Supported wildcards are * and **?** (**%** and **_** are not supported). * and **?** in name are always used as wildcards in the Workspace Retrieval function. ' **'/"** " are not supported, alphanumeric without * or **?** will be considered as literally (will function as in quotes.)

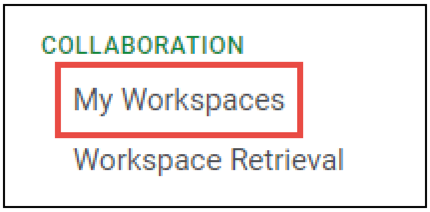
Creating a Workspace With a Template

You can create a workspace to start a project based on a pre-configured template created by your OnBase administrator.

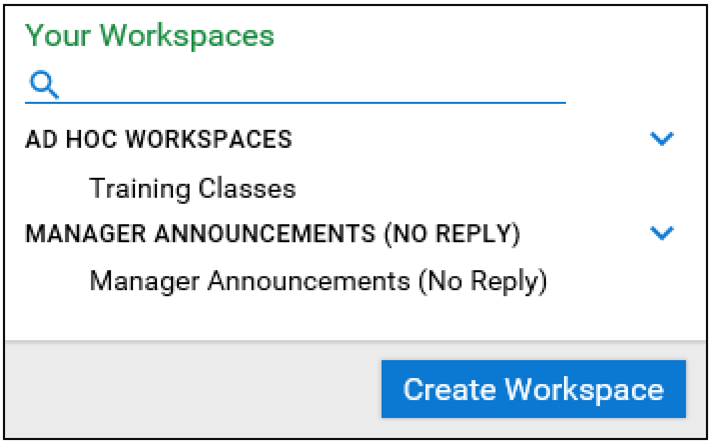
As the owner of the workspace, you can change any of the pre-defined options inherited from the template as needed. Once a workspace is created, any default settings can be updated from within the workspace from the **Workspace Options** button. For more information on updating settings from a created workspace, see Configuring Workspace Options on page 119.

To create a workspace with a template:

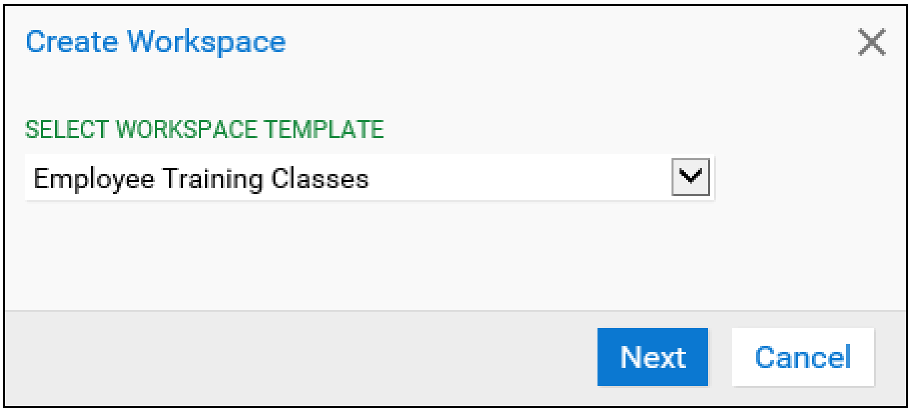
1. From the main menu in the Web Client, select the **My Workspaces** option under **Collaboration**.



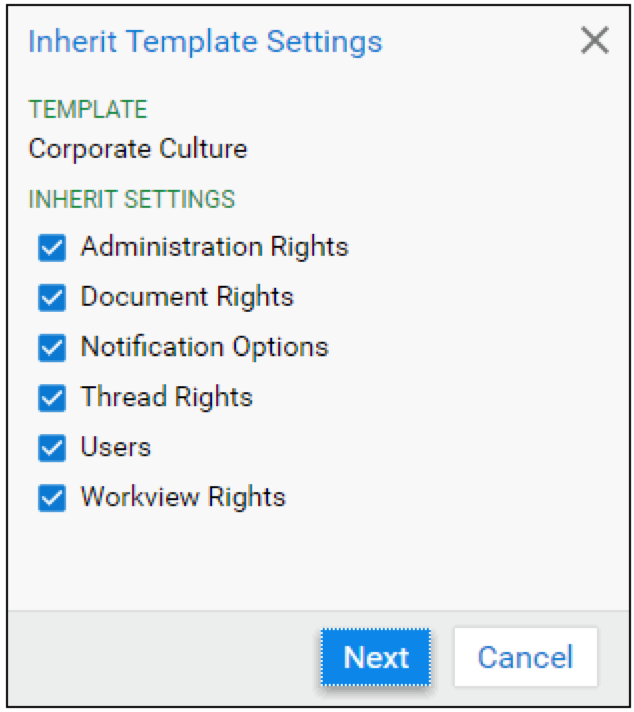
The **Your Workspaces** pane is displayed.



2. Click the **Create Workspace** button. The **Create Workspace** dialog box is displayed.



3. From the **Select Workspace Template** drop-down list, select a pre-configured template to use for your workspace.
4. Click **Next**. The **Inherit Template Settings** dialog box is displayed.

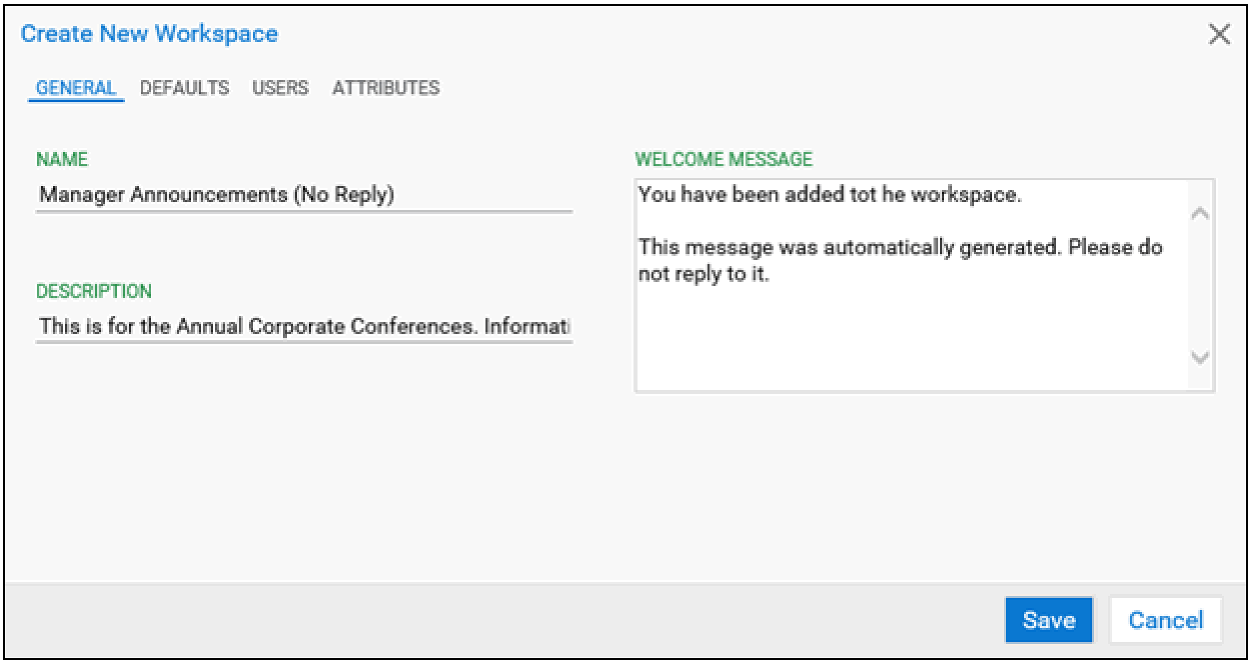


5. Select all settings from the template that you want your workspace to inherit. The following are the available options:

Inherit Setting	Description
Administration Rights	Allows new members of the workspace to have administration rights. For more information on administration rights, see The Administration Tab on page 124.
Document Rights	Allows specific actions a user can take with documents in a workspace. This includes adding, viewing, removing, and modifying documents. For more information on document rights, see The Document Tab on page 124.
Notification Options	Allows specific notifications emailed to users. For more information on notification options, see The Options Tab on page 123.
Thread Rights	Allows specific rights regarding discussion threads. This includes reading, replying, and posting new discussion threads in the workspace. For more information on thread rights, see The Thread Tab on page 125.

Inherit Setting	Description
Users	Allows users with access to the template workspace access to this workspace. For more information on user access, see User Options on page 126.
WorkView Rights	Allows specific rights regarding WorkView objects. This includes adding, viewing, and removing WorkView objects in the workspace. For more information on WorkView rights, see The WorkView Tab on page 125. **Note:** You must be licensed for WorkView to use WorkView objects in Collaboration. See the **WorkView** documentation for details on WorkView objects.

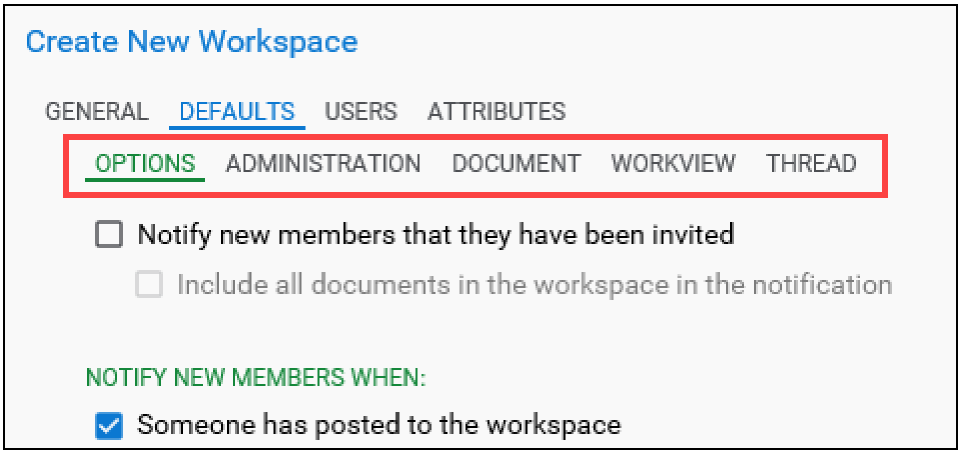
6. Click **Next**. The **Create New Workspace** dialog box is displayed.



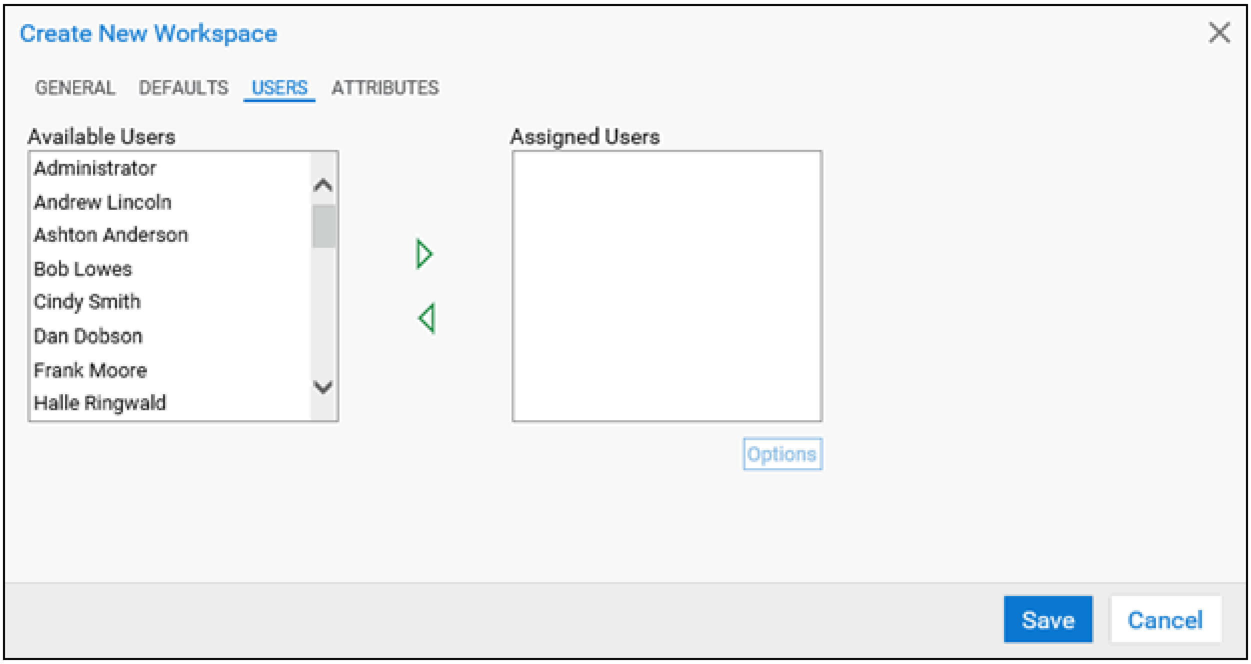
7. Click the **General** tab. The **Name**, **Description**, and **Welcome Message** fields are displayed and entered according to the template you selected.
8. Edit the **Name**, **Description**, and **Welcome Message** fields as needed.

Note: The **Name** and **Description** fields allow a maximum of 255 characters.

9. Click the **Defaults** tab. A set of sub-tabs are displayed for workspace member rights.

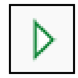


10. Select the appropriate rights for the members of this workspace. For more information on workspace member rights, see the following sections:
    - The Options Tab on page 123
    - The Administration Tab on page 124
    - The Document Tab on page 124
    - The WorkView Tab on page 125
    - The Thread Tab on page 125
11. Click the **Users** tab. Available users you can assign to the workspace are displayed.



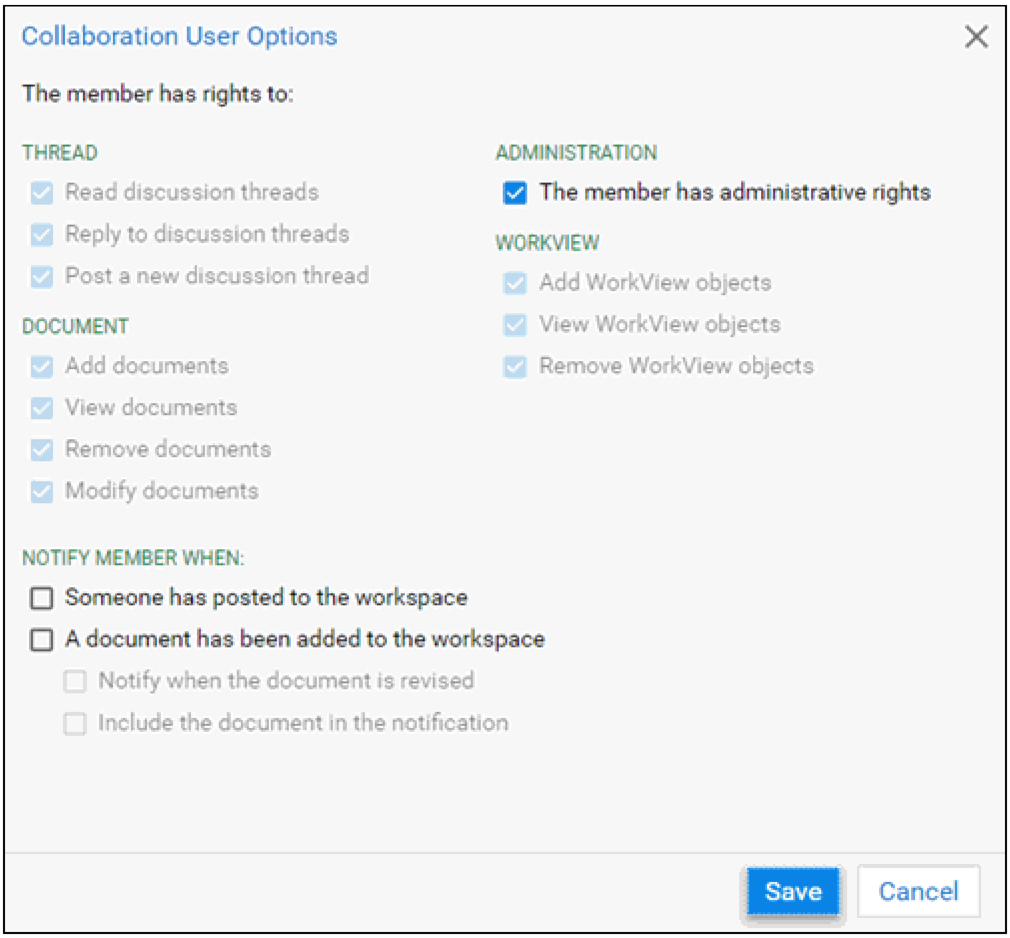
12. Select any users you want to add to the workspace from the **Available Users** list.

13. Click the add button.



The selected users are added to the **Assigned Users** list.

14. Select a user from the **Assigned Users** list and click the **Options** button. The **Collaboration User Options** dialog box is displayed.



15. Select or deselect any of the member rights or notification options for the individual user.

Note: If the workspace was configured to inherit the default settings from the template, some options may already be selected.

Thread Option	Description
Read discussion threads	Allows members to read discussion threads in the workspace.
Reply to discussion threads	Allows members to reply to discussion threads in the workspace.
Post a new discussion thread	Allows members to create a new discussion thread in the workspace.

Document Option	Description
Add documents	Allows members to add documents to the workspace.
View documents	Allows members to view documents in the workspace. The following are considerations when granting the View documents right: • If a workspace member is granted the View documents right, the member can view documents associated with the workspace regardless of whether they have rights to the Document Type. • If a Discussion Thread was created at a document level, workspace members cannot view the documents associated with the document-level Discussion Thread if the workspace members do not have rights to view the Document Type.
Remove documents	Allows members to remove documents from the workspace. Removing a document from a workspace does not remove the document from any other workspaces or from OnBase.
Modify documents	Allows members to modify documents in the workspace. **Note:** If a user has the right to modify a document outside of the workspace, that user can modify the same document within the workspace even if the Modify documents option is not selected.

Notify Member Option	Description
Someone has posted to the workspace	Sends a notification to workspace members when a new Discussion Thread is added to the workspace.
A document has been added to the workspace	Sends a notification to workspace members when a new document is added to the workspace.

Notify Member Option	Description
Notify when the document is revised	Sends a notification to workspace members when a new revision of an existing workspace document is added. This option is only available when the **A document has been added to the workspace** option is selected. **Note:** Notifications are only sent if the document was revised from the OnBase Client. If the revision occurs in the Unity Client or the Web Client, no notifications are sent.
Include the document in the notification	Attaches the new document added to the workspace in the notification to workspace members. This option is only available when the **A document has been added to the workspace** option is selected. **Note:** Even if users are not permitted to view documents, if a notification is configured to contain documents, the user can open the document from the email notification.

Administration Option	Description
The member has administrative rights	Configures administration rights to new workspace members for documents, WorkView objects, and discussion threads. If this option is selected, all other rights in the dialog box are automatically selected for workspace members. You cannot deselect an option if it was automatically selected when the **New members have administrative rights** option was selected

Workview Option	Description
Add WorkView objects	Allows members to add WorkView objects to the workspace.
View WorkView objects	Allows members to view WorkView objects in the workspace.
Remove WorkView objects	Allows members to remove WorkView objects from the workspace.

16. Click **Save**.

17. Click the **Attributes** tab. All configured attributes for the workspace are displayed.

18. Enter an attribute value for each configured attribute. For example, if the configured attribute for the workspace is **Administrator Last Name**, enter the last name of the administrator for this workspace. When a user searches for this last name, the workspace displays in the **Results** pane.

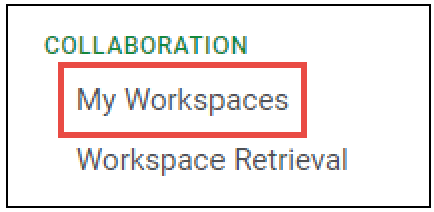
    For more information on workspace retrieval, see Using Workspace Retrieval to Find a Workspace on page 103.
19. Click **Save**. Your workspace is created and added to the **Your Workspaces** pane under the selected template name.

Configuring an Ad Hoc Workspace

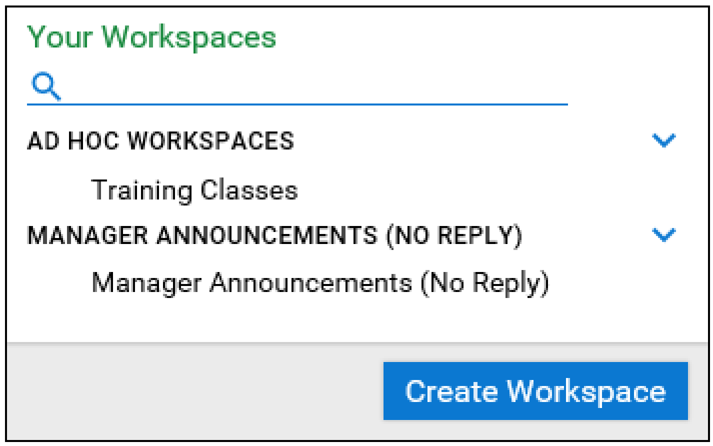
You can create an ad hoc workspace to start a project without the use of a pre-configured template.

To create an ad hoc workspace:

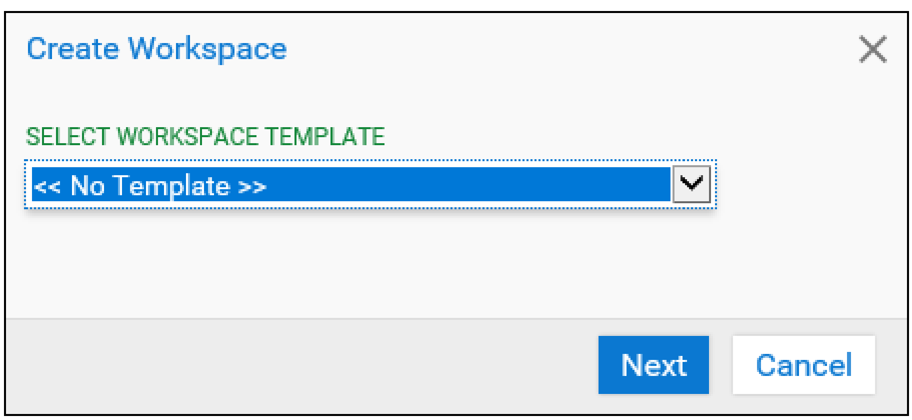
1. From the main menu, select the **My Workspaces** option under **Collaboration**.



   The **Your Workspaces** pane is displayed.

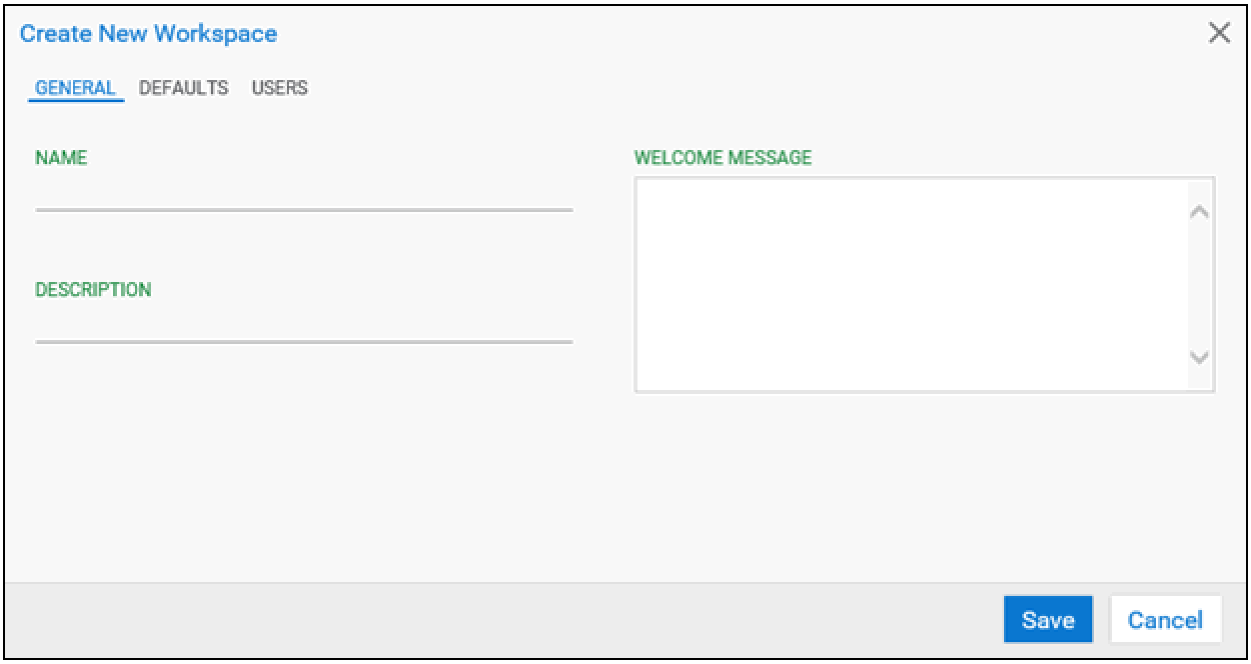


2. Click the **Create Workspace** button. The **Create Workspace** dialog box is displayed.



3. From the **Select Workspace Template** drop-down list, select **No Template**.

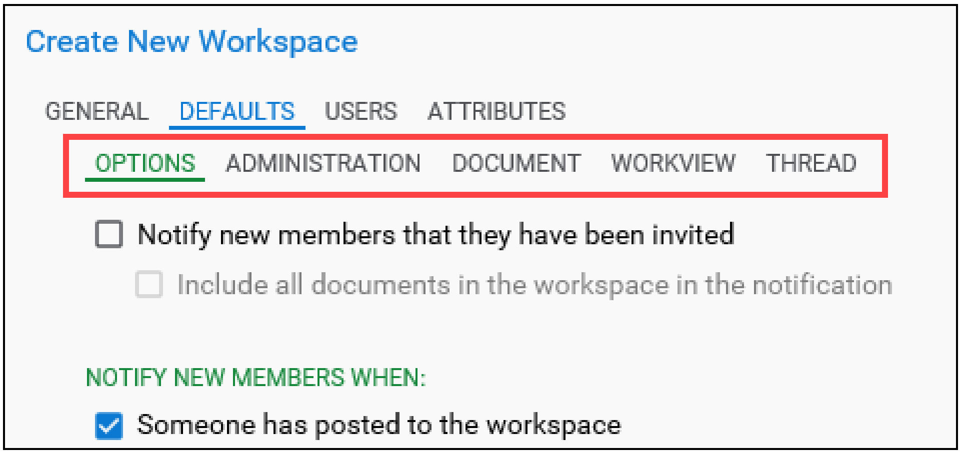
4. Click **Next**. The **Create New Workspace** dialog box is displayed.



5. Enter a name for the workspace in the **Name** field.
6. Enter a description of the workspace in the **Description** field.

Note: The **Name** and **Description** fields allow a maximum of 255 characters.

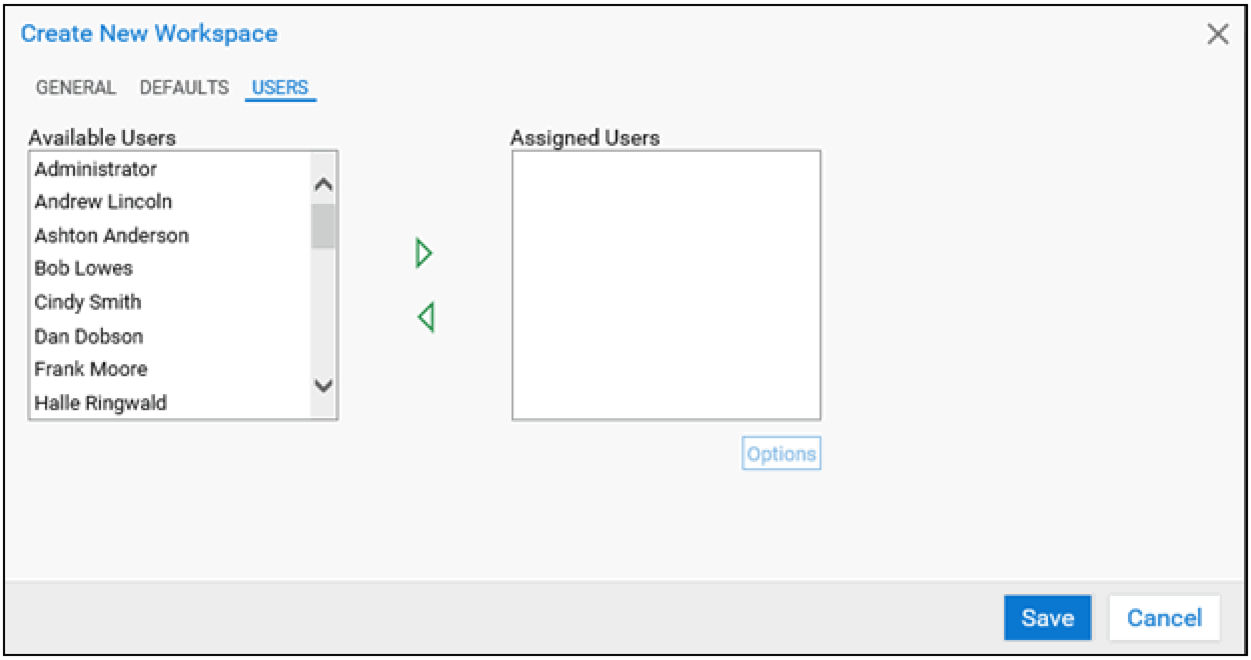
7. Enter a welcome message for new workspace members in the **Welcome Message** field.
8. Click the **Defaults** tab. A set of sub-tabs are displayed for workspace member rights.



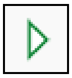
9. Select the appropriate rights for the members of this workspace. For more information on workspace member rights, see the following sections:
   - The Options Tab on page 123
   - The Administration Tab on page 124

- The Document Tab on page 124
- The WorkView Tab on page 125
- The Thread Tab on page 125

10. Click the **Users** tab. Available users you can assign to the workspace are displayed.



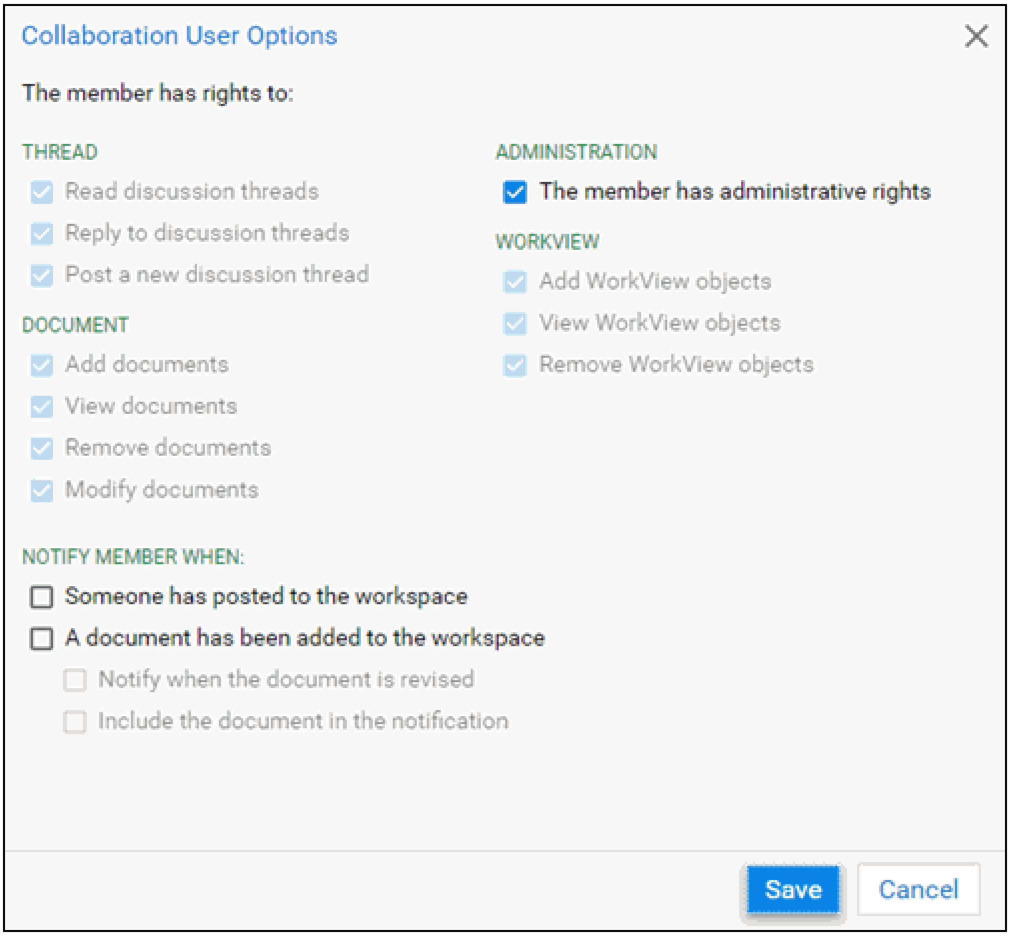
11. Select any users you want to add to the workspace from the **Available Users** list.
12. Click the add button.



    The selected users are added to the **Assigned Users** list.

13. Select a user from the **Assigned Users** list.

14. Click the **Options** button. The **Collaboration User Options** are displayed.



15. Select or deselect any of the member rights or notification options for the individual user.

Note: Depending on what rights were selected from the **Defaults** tab, some options may already be selected.

Thread Option	Description
Read discussion threads	Allows members to read discussion threads in the workspace.
Reply to discussion threads	Allows members to reply to discussion threads in the workspace.
Post a new discussion thread	Allows members to create a new discussion thread in the workspace.

Document Option	Description
Add documents	Allows members to add documents to the workspace.
View documents	Allows members to view documents in the workspace. The following are considerations when granting the View documents right: • If a workspace member is granted the View documents right, the member can view documents associated with the workspace regardless of whether they have rights to the Document Type. • If a Discussion Thread was created at a document level, workspace members cannot view the documents associated with the document-level Discussion Thread if the workspace members do not have rights to view the Document Type.
Remove documents	Allows members to remove documents from the workspace. Removing a document from a workspace does not remove the document from any other workspaces or from OnBase.
Modify documents	Allows members to modify documents in the workspace. **Note:** If a user has the right to modify a document outside of the workspace, that user can modify the same document within the workspace even if the Modify documents option is not selected.

Notify Member Option	Description
Someone has posted to the workspace	Sends a notification to workspace members when a new Discussion Thread is added to the workspace.
A document has been added to the workspace	Sends a notification to workspace members when a new document is added to the workspace.

Notify Member Option	Description
Notify when the document is revised	Sends a notification to workspace members when a new revision of an existing workspace document is added. This option is only available when the **A document has been added to the workspace** option is selected. **Note:** Notifications are only sent if the document was revised from the OnBase Client. If the revision occurs in the Unity Client or the Web Client, no notifications are sent.
Include the document in the notification	Attaches the new document added to the workspace in the notification to workspace members. This option is only available when the **A document has been added to the workspace** option is selected. **Note:** Even if users are not permitted to view documents, if a notification is configured to contain documents, the user can open the document from the email notification.

Administration Option	Description
The member has administrative rights	Configures administration rights to new workspace members for documents, WorkView objects, and discussion threads. If this option is selected, all other rights in the dialog box are automatically selected for workspace members. You cannot deselect an option if it was automatically selected when the **New members have administrative rights** option was selected

Workview Option	Description
Add WorkView objects	Allows members to add WorkView objects to the workspace.
View WorkView objects	Allows members to view WorkView objects in the workspace.
Remove WorkView objects	Allows members to remove WorkView objects from the workspace.

16. Click **Save**.
17. Click **Save** from the **Create New Workspace** dialog box. Your ad hoc workspace is created and added to the **Your Workspaces** pane under **Ad Hoc Workspaces**.

Workspace Administrators

If you create a workspace, you are automatically the administrator of the workspace. Administrators are granted all administration rights which include all document, WorkView, and discussion thread rights.

Only administrators can access and configure workspace options, including assigning user rights for the workspace. See Configuring Workspace Options on page 119 for more information.

In addition, you can assign other users administration rights to the workspace.

Configuring Workspace Options

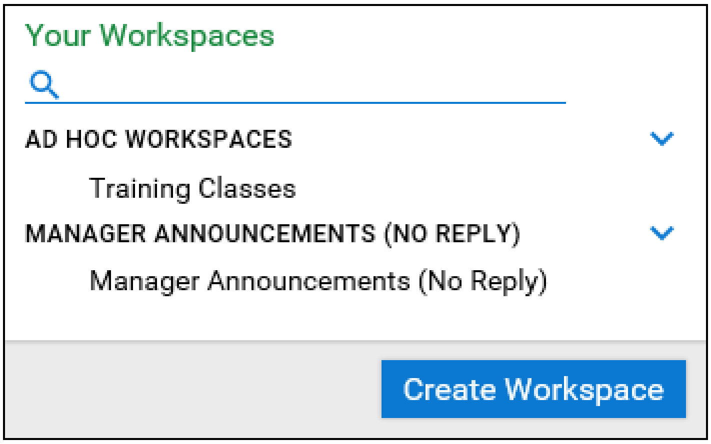
You can configure workspace options during workspace creation and edit any configurations after a workspace is created. You can access workspace options in one of two ways:

- From the **Create New Workspace** dialog box. To access this dialog box when configuring a workspace, see either Creating a Workspace With a Template on page 105 or Configuring an Ad Hoc Workspace on page 112.
- From the **Workspace Options** dialog box.

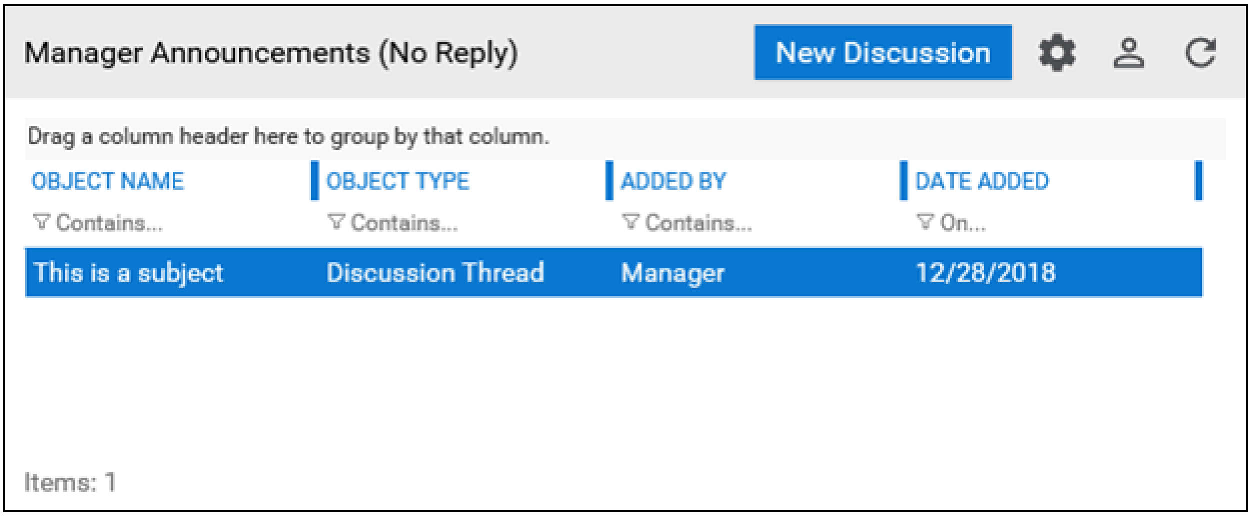
Note: You must have administration rights to the workspace to access the **Workspace Options** dialog box.

To access workspace options from the **Workspace Options** dialog box:

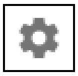
1. From the main menu, click the **My Workspaces** option under **Collaboration**. The **Your Workspaces** pane is displayed.



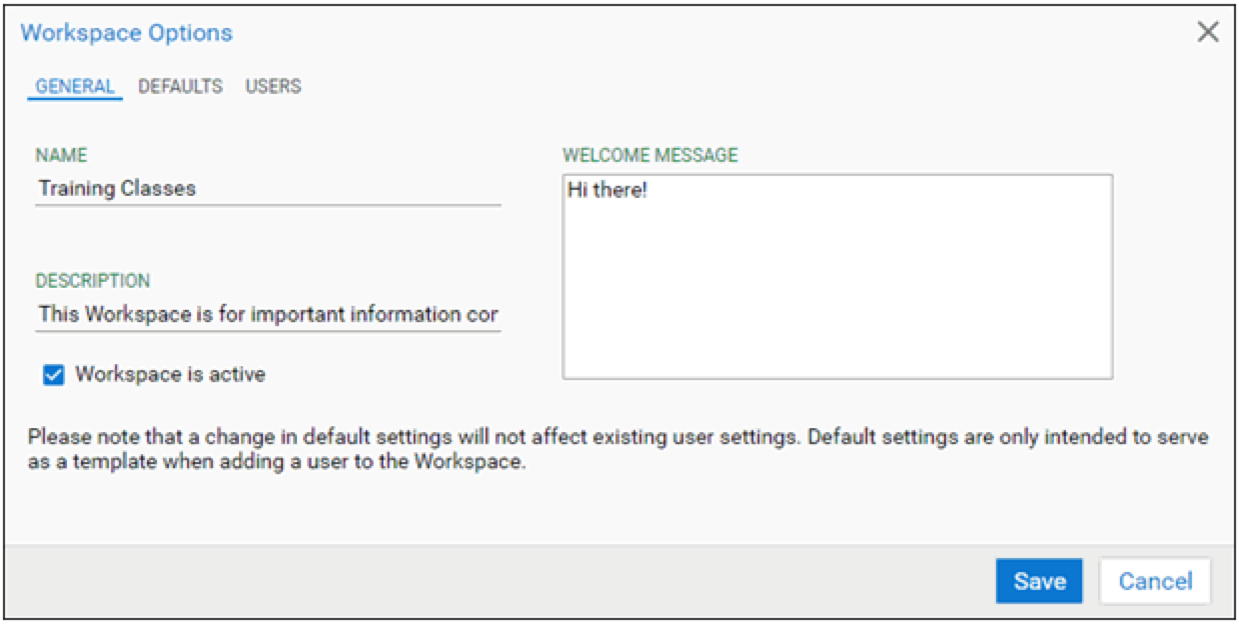
2. Select a workspace. The workspace is displayed.



3. Click the **Workspace Options** button.



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



The following topics contain information about each set of options available:

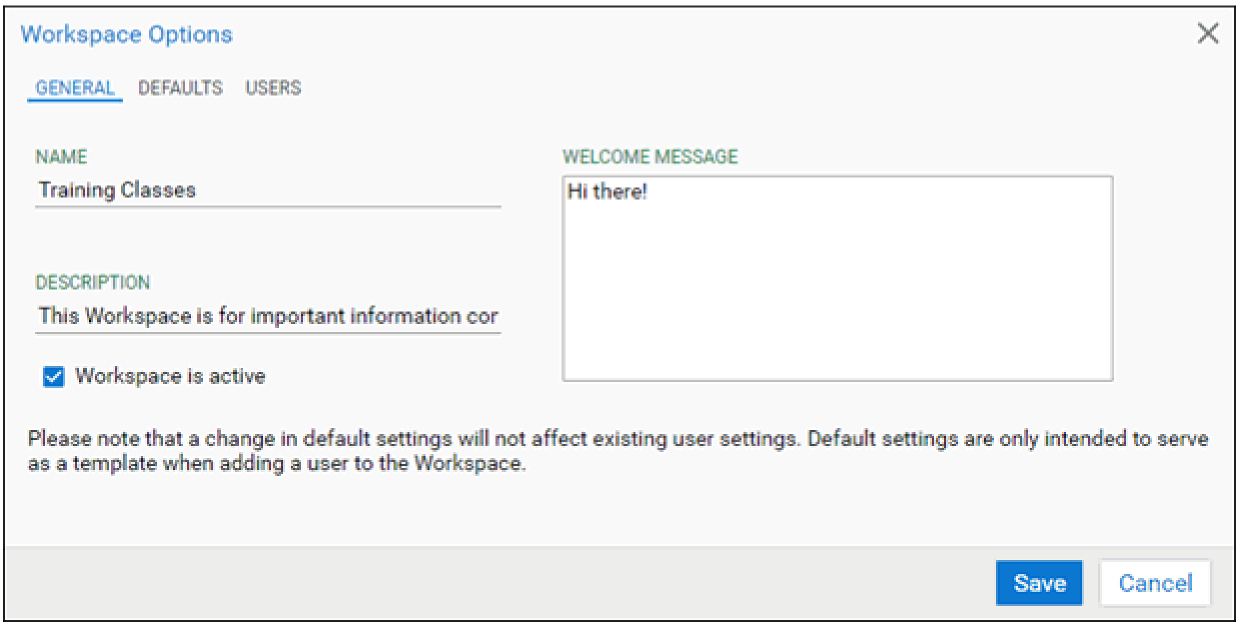
- General Options on page 121
- Default Options on page 122
- User Options on page 126
- Attribute Options on page 129

General Options

General options are found under the **General** tab in the **Workspace Options** or **Create New Workspace** dialog boxes.

See the following sections for more information about accessing these dialog boxes:

- Creating a Workspace With a Template on page 105
- Configuring an Ad Hoc Workspace on page 112



The configured options for this tab are displayed to workspace members when they are added to the workspace and when selecting the workspace in the Web Client.

The following are available options:

General Option	Description
Name	The name of the workspace. The name entered is displayed in the **Your Workspaces** pane. **Note:** The maximum amount of characters allowed is 255.
Description	The description of the workspace. The description is displayed in the **Your Workspaces** pane after selecting a workspace. **Note:** The maximum amount of characters allowed is 255.
Welcome Message	Welcome text that is displayed when an invitation to the workspace is sent to a user. You may include other pertinent information such as required user names and passwords.

General Option	Description
Workspace is active	Controls whether the workspace is displayed in the **Your Workspaces** pane. Select this option to display the workspace in the **Your Workspaces** pane or deselect this option to mark the workspace as inactive. **Note:** Once a workspace is marked inactive, all workspace options become read-only until the workspace is marked active again. This option is only available in the **Workspace Options** dialog box, after a workspace is created. For more information on active and inactive workspaces, see Active Workspace on page 147.

Default Options

You can configure global rights for all workspace member under the **Defaults** tab in the **Create New Workspace** dialog box or the **Workspace Options** dialog box.

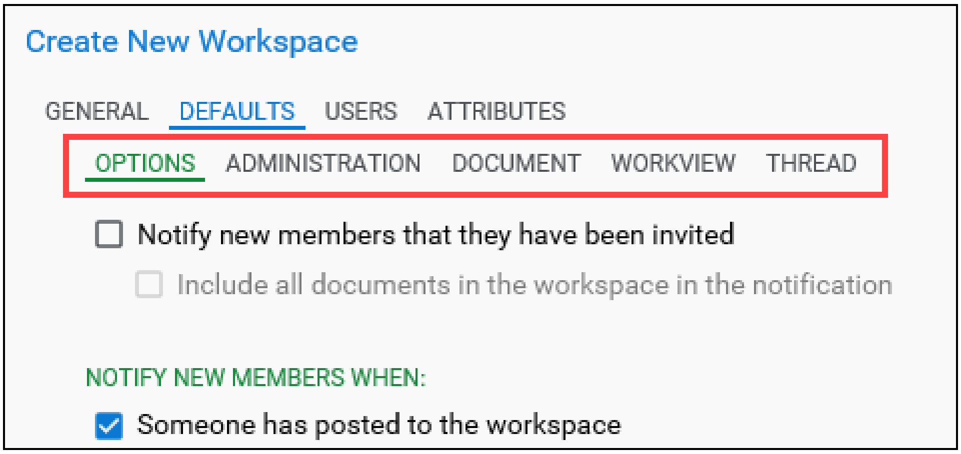
See the following sections for more information about accessing these dialog boxes:

- Creating a Workspace With a Template on page 105
- Configuring an Ad Hoc Workspace on page 112

Selected rights are configured as the default rights for every member added to the workspace.

Note: To configure individual rights for a specific workspace member, see User Options on page 126.

The **Defaults** tab contains another set of tabs containing various member rights and notification options to configure.



Select from the following topics to learn more about available rights and notification options for each tab:

- The Options Tab on page 123
- The Administration Tab on page 124

- The Document Tab on page 124
- The WorkView Tab on page 125
- The Thread Tab on page 125

The Options Tab

The **Options** tab contains notification options for members of the workspace.

Note: Users can override default notification settings of a workspace by configuring their user options. See User Options (Overrides Default Notification Settings for All Workspaces) on page 149 for details.

The following options are available:

Notification Option	Description
Notify new members that they have been invited	Sends a notification to all workspace members that they were invited to the new workspace. **Note:** This option must be selected each time you add members to the workspace and would like them to be notified.
Include all documents in the workspace in the notification	Adds all documents in the workspace to member notifications. **Note:** This option is only available when the **Notify new members that they have been invited** option is selected.

Notify New Member When Option	Description
Someone has posted to the workspace	Sends a notification to workspace members when a new Discussion Thread is added to the workspace.
A document has been added to the workspace	Sends a notification to workspace members when a new document is added to the workspace.
Notify when the document is revised	Sends a notification to workspace members when a new revision of an existing workspace document is added. This option is only available when the **A document has been added to the workspace** option is selected. **Note:** Notifications are only sent if the document was revised from the OnBase Client. If the revision occurs in the Unity Client or the Web Client, no notifications are sent.

Notify New Member When Option	Description
Include the document in the notification	Attaches the new document added to the workspace in the notification to workspace members. This option is only available when the **A document has been added to the workspace** option is selected. **Note:** Even if users are not permitted to view documents, if a notification is configured to contain documents, the user can open the document from the email notification.

The Administration Tab

The **Administration** tab contains options to give workspace members administration rights to the workspace.

Administration Option	Description
New members have administrative rights	Configures administration rights to new workspace members for documents, WorkView objects, and discussion threads. If this option is selected, all other rights in the dialog box are automatically selected for workspace members. You cannot deselect an option if it was automatically selected when the **New members have administrative rights** option was selected.

The Document Tab

The **Document** tab contains rights to documents for workspace members. The following rights are available.

New Members Have Rights To Option	Description
Add documents	Gives workspace members the right to add documents to the workspace.
View documents	Gives workspace members the right to view documents in the workspace. The following are considerations when granting the **View documents** right: • If a workspace member is granted the **View documents** right, the member can view documents associated with the workspace regardless of whether they have rights to the Document Type. • If a Discussion Thread was created at a document level, workspace members cannot view the documents associated with the document-level Discussion Thread if the workspace members do not have rights to view the Document Type.

New Members Have Rights To Option	Description
Remove documents	Gives workspace members the right to remove documents from the workspace. Removing a document from a workspace does not remove the document from any other workspaces or from OnBase.
Modify documents	Gives workspace members the right to modify documents in the workspace. **Note:** If a user has the right to modify a document outside of the workspace, that user can modify the same document within the workspace even if the **Modify documents** option is not selected.

The WorkView Tab

The **WorkView** tab contains rights to WorkView objects for workspace members.

Note: You must be licensed for WorkView to use WorkView objects in Collaboration. See the **WorkView** documentation for details on WorkView objects.

The following rights are available:

New Members Have Rights To Option	Description
Add WorkView objects	Gives workspace members the right to add WorkView objects to the workspace.
View WorkView objects	Gives workspace members the right to view WorkView objects in the workspace.
Remove WorkView objects	Gives workspace members the right to remove WorkView objects from the workspace.

The Thread Tab

The **Thread** tab contains rights to discussion threads for workspace members. The following rights are available:

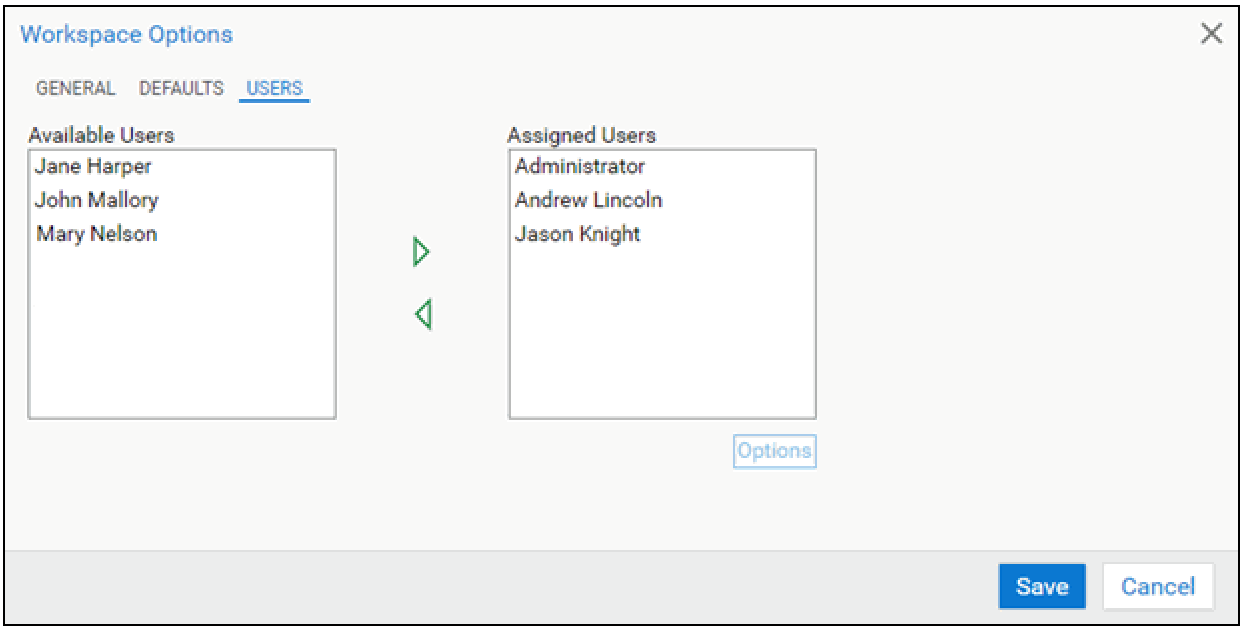
New Members Have Rights To Option	Description
Read discussion threads	Gives workspace members the right to read discussion threads in the workspace.
Reply to discussion threads	Gives workspace members the right to reply to discussion threads in the workspace.

New Members Have Rights To Option	Description
Post a new discussion thread	Gives workspace members the right to create a new discussion thread in the workspace.

User Options

You can configure workspace member rights for an individual member rather than each member inheriting the default rights configured when the workspace was created.

This can be configured in the **Workspace Options** dialog box from the **Users** tab.

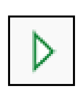


To configure workspace rights for an individual member:

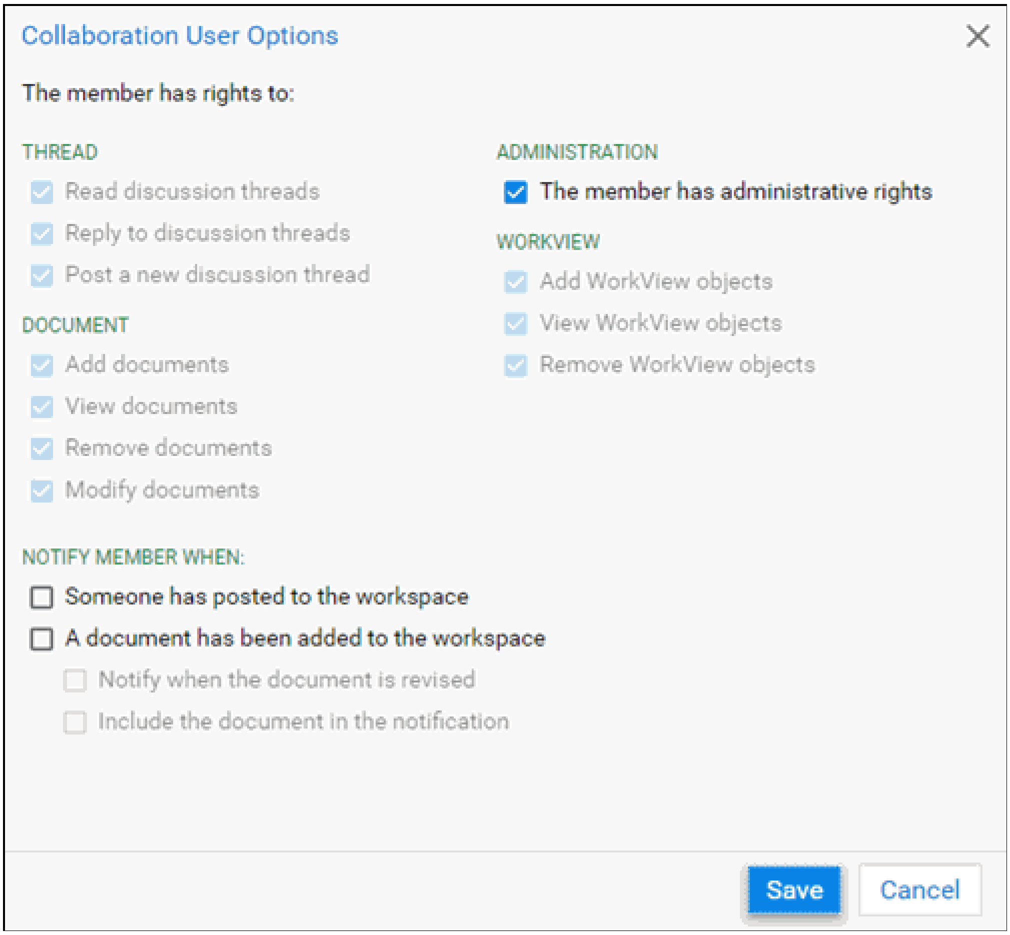
1. From the **Available Users** list, select a user name.

Note: Available users are users that are already created in OnBase. If you do not see a user listed in the **Available Users** list, see your system administrator.

2. Click the add button to move the user name to the **Assigned Users** list.



3. Select the user name from the **Assigned Users** list and click the **Options** button. The **Collaboration User Options** dialog box is displayed.



Note: If the workspace was configured to inherit the default settings of the template, some options may already be selected.

4. Select member rights and notification options for the selected member.

   The following options are available:

Thread Option	Description
Read discussion threads	Allows members to read discussion threads in the workspace.
Reply to discussion threads	Allows members to reply to discussion threads in the workspace.
Post a new discussion thread	Allows members to create a new discussion thread in the workspace.

Document Option	Description
Add documents	Allows members to add documents to the workspace.
View documents	Allows members to view documents in the workspace. The following are considerations when granting the View documents right: • If a workspace member is granted the View documents right, the member can view documents associated with the workspace regardless of whether they have rights to the Document Type. • If a Discussion Thread was created at a document level, workspace members cannot view the documents associated with the document-level Discussion Thread if the workspace members do not have rights to view the Document Type.
Remove documents	Allows members to remove documents from the workspace. Removing a document from a workspace does not remove the document from any other workspaces or from OnBase.
Modify documents	Allows members to modify documents in the workspace. **Note:** If a user has the right to modify a document outside of the workspace, that user can modify the same document within the workspace even if the Modify documents option is not selected.

Notify Member Option	Description
Someone has posted to the workspace	Sends a notification to workspace members when a new Discussion Thread is added to the workspace.
A document has been added to the workspace	Sends a notification to workspace members when a new document is added to the workspace.

Notify Member Option	Description
Notify when the document is revised	Sends a notification to workspace members when a new revision of an existing workspace document is added. This option is only available when the **A document has been added to the workspace** option is selected. **Note:** Notifications are only sent if the document was revised from the OnBase Client. If the revision occurs in the Unity Client or the Web Client, no notifications are sent.
Include the document in the notification	Attaches the new document added to the workspace in the notification to workspace members. This option is only available when the **A document has been added to the workspace** option is selected. **Note:** Even if users are not permitted to view documents, if a notification is configured to contain documents, the user can open the document from the email notification.

Administration Option	Description
The member has administrative rights	Configures administration rights to new workspace members for documents, WorkView objects, and discussion threads. If this option is selected, all other rights in the dialog box are automatically selected for workspace members. You cannot deselect an option if it was automatically selected when the **New members have administrative rights** option was selected

Workview Option	Description
Add WorkView objects	Allows members to add WorkView objects to the workspace.
View WorkView objects	Allows members to view WorkView objects in the workspace.
Remove WorkView objects	Allows members to remove WorkView objects from the workspace.

5. Click **Save**. Repeat this process for any additional members.

Attribute Options

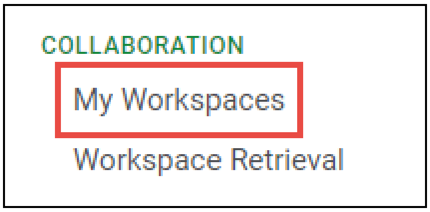
You can configure attribute values by which other users can search when searching and retrieving workspaces. Attribute values are configured from the **Attributes** tab, which is only displayed if attributes are configured for a workspace template.

Enter a useful attribute value for each configured attribute. For example, if the configured attribute for the workspace is **Administrator Last Name**, enter the last name of the administrator for this workspace. When a user searches for this last name, the workspace displays in the **Results** pane.

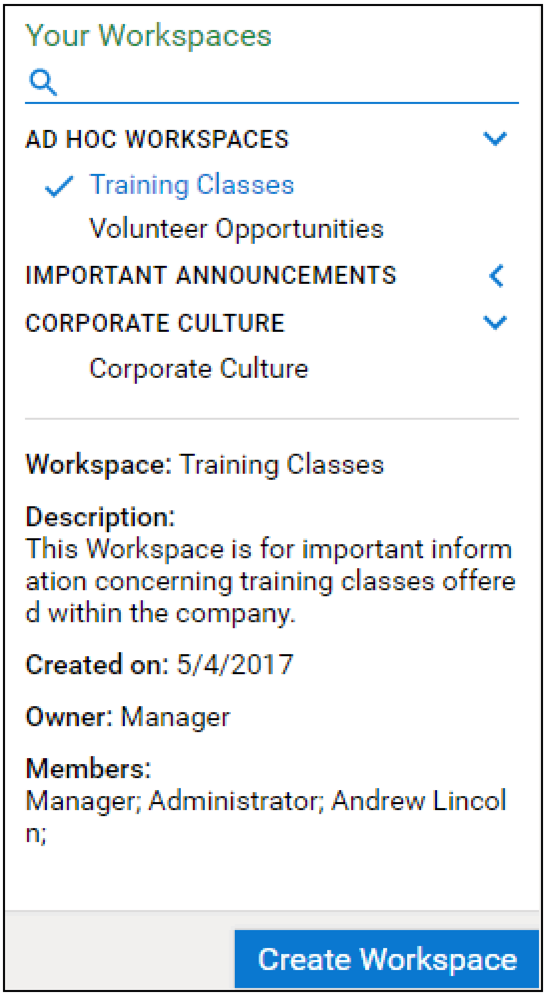
For more information on workspace retrieval, see Using Workspace Retrieval to Find a Workspace on page 103.

Creating a Workspace Discussion Thread

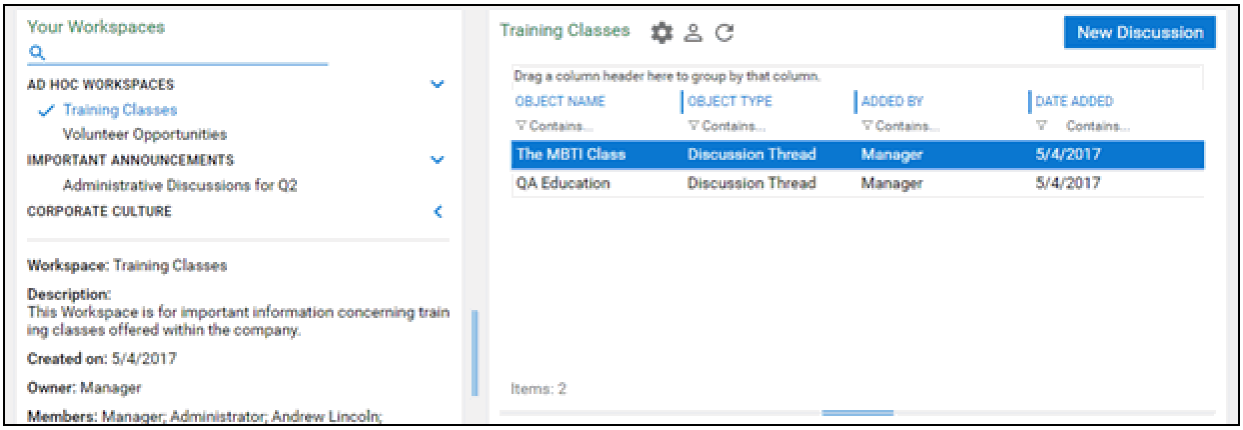
1. Click the **My Workspaces** option under **Collaboration** in the **Main Menu**.



2. From the **Your Workspaces** pane, click the desired Workspace.



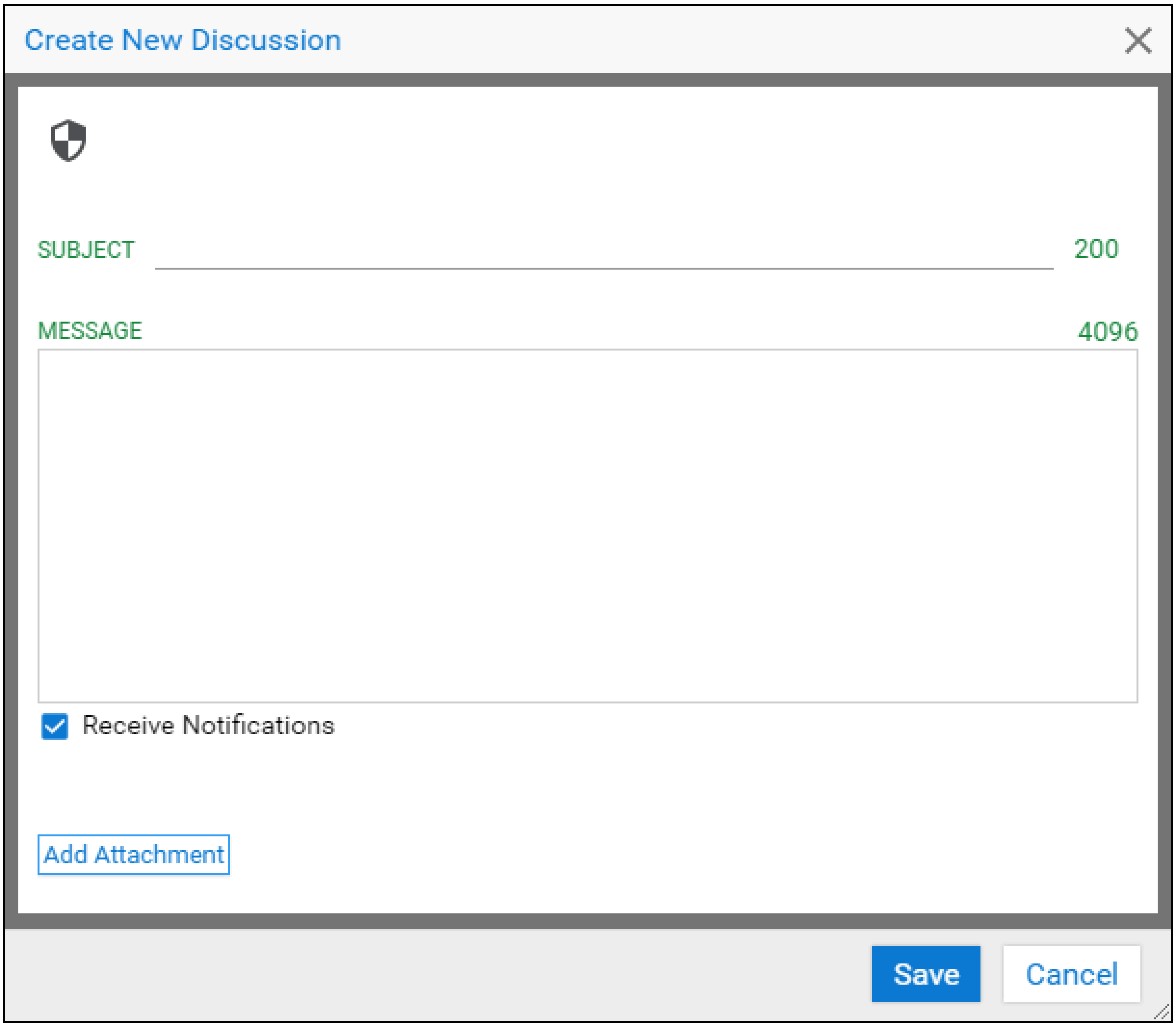
3. The Workspace Discussion Objects display in the **Collaboration Workspace** window, sorted by the date they were added to the Workspace.



Discussion Object Label	Description
Object Name	Name of the Discussion Thread, WorkView Object or document (Auto-Name of the document). **Note:** Discussion Thread names are limited to 200 characters.
Object Type	Indicates the type of object. There are three options: • Discussion Thread • Document • WorkView Object
Added By	User name of person that added the object to the Workspace **Note:** (deactivated) will display next to the user name if the user who added the document has since been deleted from OnBase.
Date Added	Date the object was added.

Click the **Create New Discussion** button.

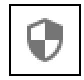
The **Create New Discussion** dialog box is displayed. This is where the first post of the Discussion Thread is created.



Note: Only the first 75 characters of the document's name is displayed in the **Create New Discussion** dialog box header. If the document's name is longer than 75 characters, the entire document name can be viewed in the tool tip by scrolling the pointer over the dialog box's header.

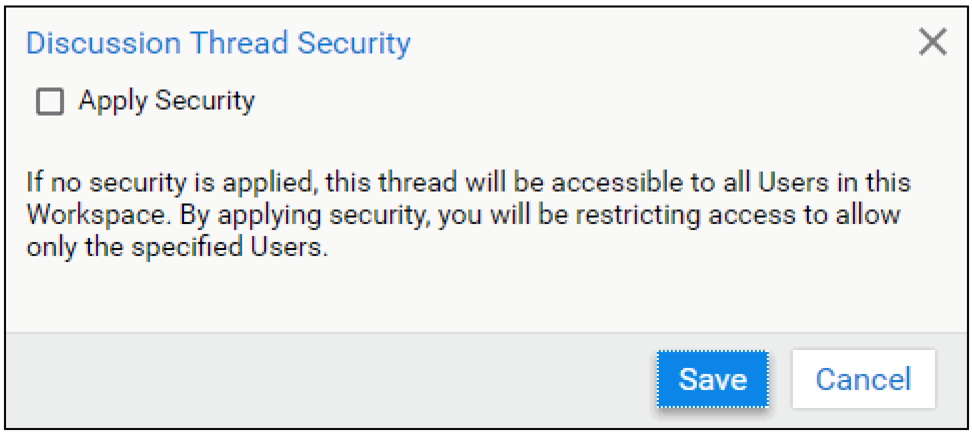
4. In the **Subject** field, type a name for the Discussion Thread.
5. In the **Message** field, type the contents for the first post of the Discussion Thread. Posts can be 4096 characters or fewer.

6. Click the **Apply Security** button to select which users may view this thread.

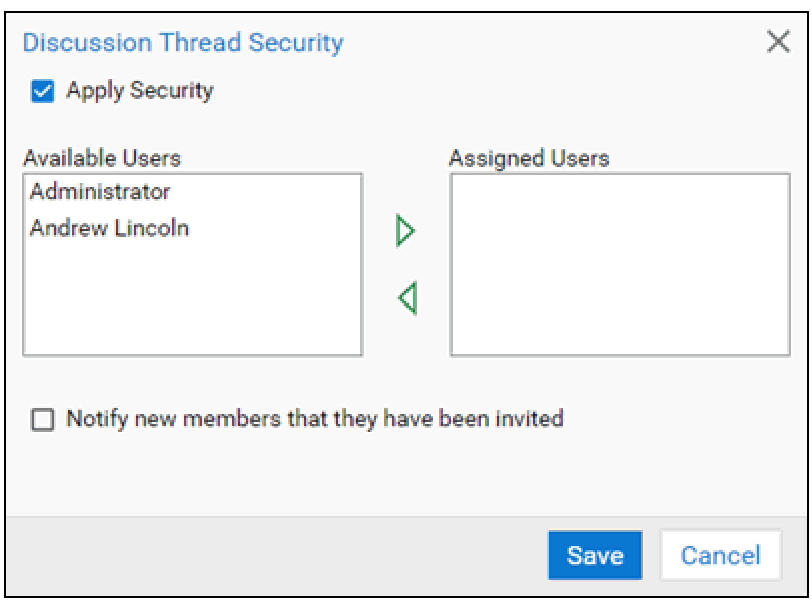


Note: Depending upon your system configuration, you may not have the **Apply Security** button. See your system administrator for questions regarding Thread Level Security.

The **Discussion Thread Security** dialog box displays:



7. Select the **Apply Security** check box to assign users to the Discussion Thread.

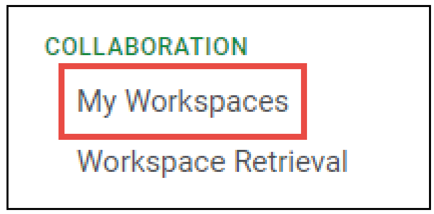


8. Select the **Notify new members that they have been invited** to inform new members of the Discussion Thread via email.
9. Click **Save** when finished, or click **Cancel** to exit.

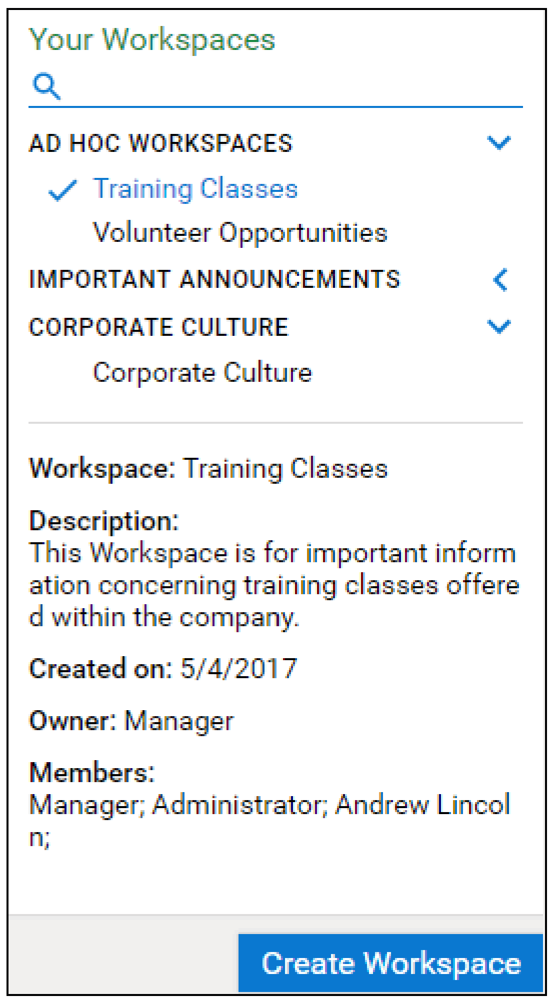
Configuring Users for a Workspace Level Discussion Thread

In addition to assigning users to a Workspace, if you create a Discussion Thread, you can make the Discussion Thread available to specific users in the Workspace.

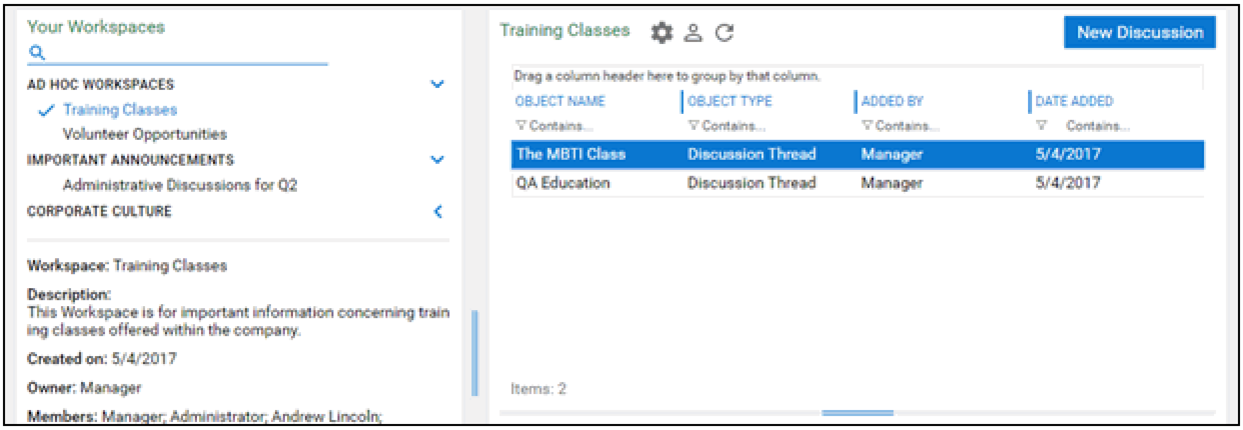
1. Click the **My Workspaces** option under **Collaboration** in the **Main Menu**.



2. From the **Your Workspaces** pane, click the desired Workspace.

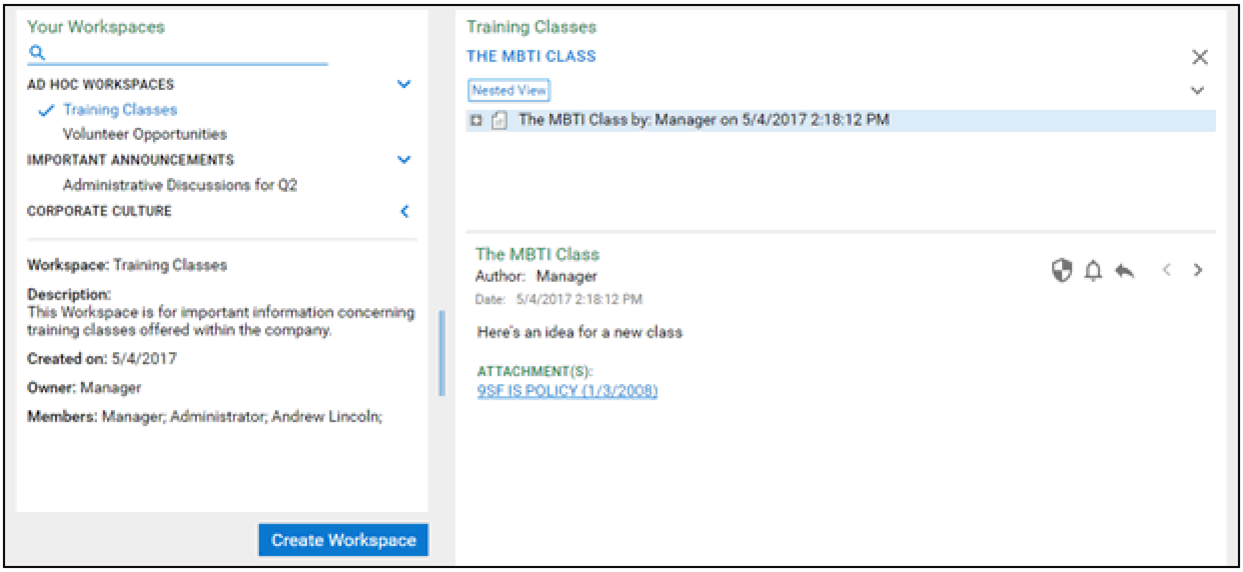


3. The Workspace Discussion Objects display in the **Collaboration Workspace** window, sorted by the date they were added to the Workspace.



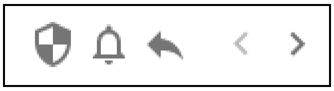
Discussion Object Label	Description
Object Name	Name of the Discussion Thread, WorkView Object or document (Auto-Name of the document) **Note:** Discussion Thread names are limited to 200 characters.
Object Type	Indicates the type of object. There are three options: • Discussion • Document • WorkView Object
Added By	User name of person that added the object to the Workspace. **Note: (deactivated)** will display next to the user name if the user who added the document has since been deleted from OnBase.
Date Added	Date the object was added.

4. Double-click a Discussion Thread to open it.

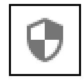


Note: This example displays the Discussion Thread in the Threaded view. Click the **Nested View** button to display the Discussion Thread in a Nested view.

5. The Discussion Thread displays along with the following Descriptors and the Discussion Thread toolbar:
   - **Author:** User that created the Discussion Thread
   - **Date:** Date the Discussion Thread post was created
   - **Subject:** Discussion Thread name

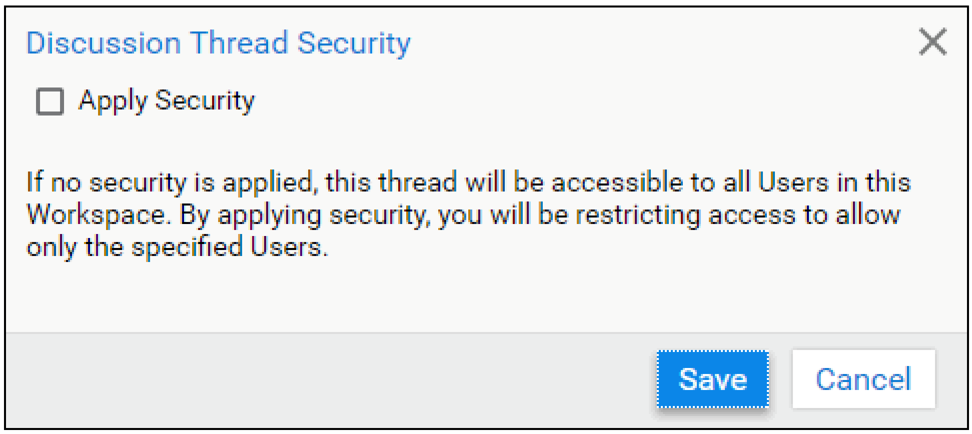


6. Click the **Apply Security** button.



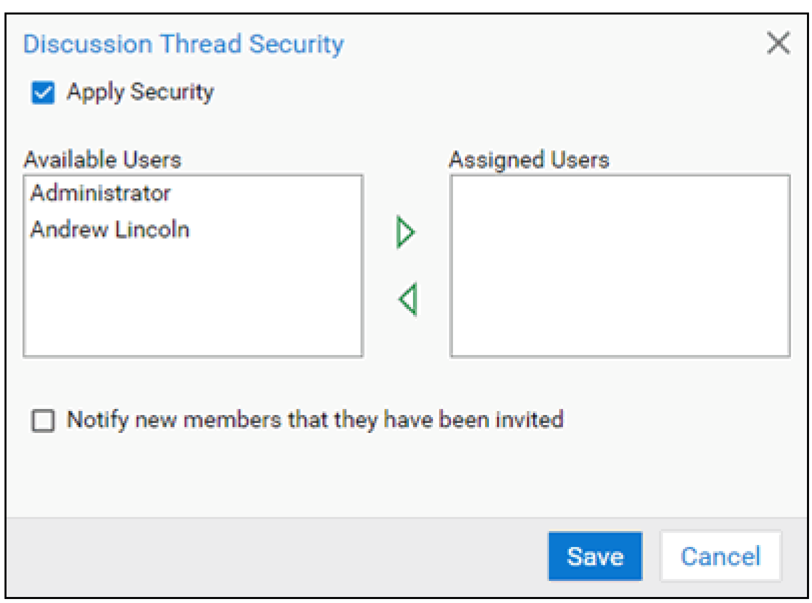
Note: Depending upon your system configuration, you may not have the Apply Security button. See your system administrator for questions regarding thread level security.

The initial **Discussion Thread Security** dialog box displays:



Note: If you do not **Apply Security** to the specified Discussion Thread, any user or user group will be able to view the Discussion Thread in that Workspace.

7. Select **Apply Security** to assign users to the Discussion Thread.



8. The **Available Users** for this Discussion Thread are the users assigned to the Workspace.
    - You can assign specific users to the Discussion Thread, enabling only those users to have access to the Discussion Thread.
    - The User Rights that they will have for the Discussion Thread are the same as the User Rights they have for the Workspace.

    Select an available user and click **Add** to move them to the **Assigned Users** list.

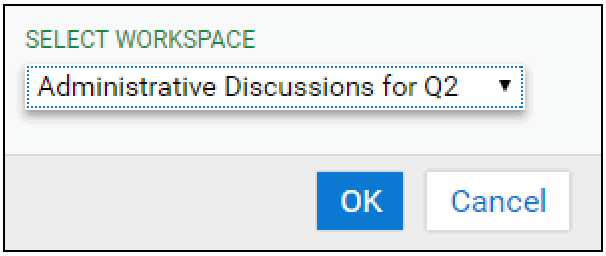
    Repeat for all desired users and click **Save** when finished and exit out of the Discussion Thread Security dialog box.
9. Select **Notify new members that they have been invited** if you want users to be notified that they are able to view this particular thread.

Adding Documents To a Workspace

Note: You must have rights to the Document Type in order to add the document to a Workspace.

Ensure you are in **Document Retrieval**. Click **Document Retrieval** in the **Main Menu**.

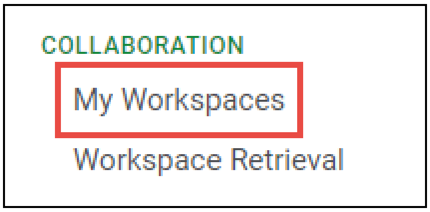
1. From a Document Search Results List or any open document, right-click and select **Collaboration | Add to Workspace**. The **Add to Workspace** dialog box displays.



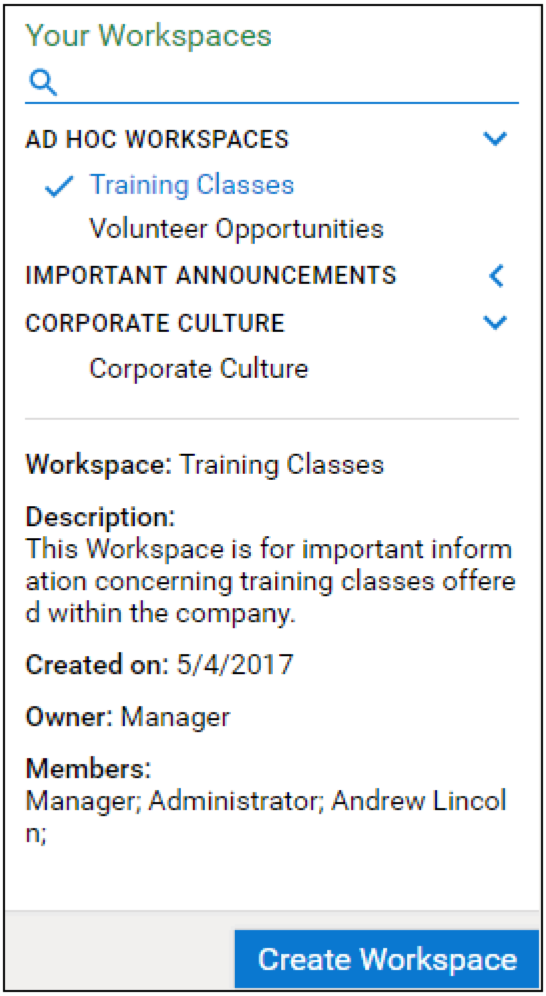
2. From the **Select Workspace** drop-down select list, select the Workspace to which you want to add the document and click **OK**.

Removing Documents from a Workspace

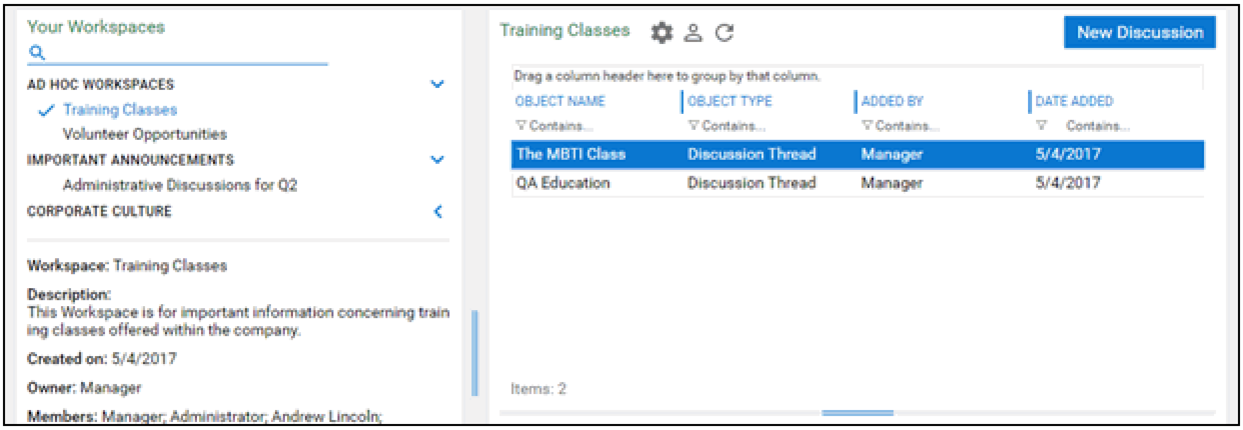
1. Click the **My Workspaces** option under **Collaboration** in the **Main Menu**.



2. From the **Your Workspaces** pane, click the desired Workspace.

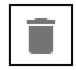


3. The Workspace Discussion Objects display in the **Collaboration Workspace** window, sorted by the date they were added to the Workspace.



4. Click the document you want to remove from the Workspace.

5. Click the **Remove from Workspace** button.



Creating a Document Level Discussion Thread Independent of a Workspace

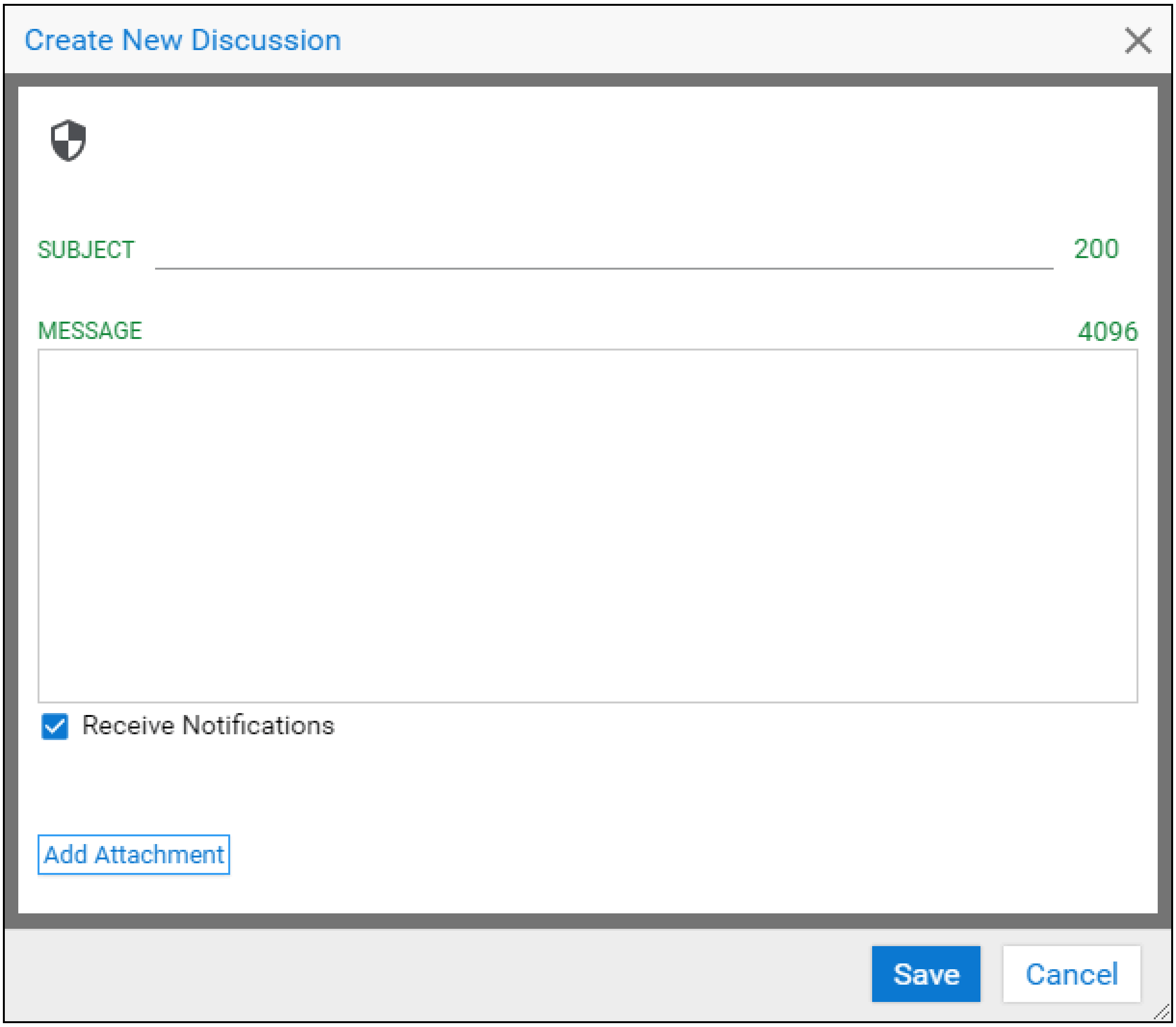
Documents do not have to be in a Workspace to be associated with a Discussion Thread. Documents can contain Discussion Threads independently of Workspace Threads.

Ensure you are in **Document Retrieval**. Click **Document Retrieval** in the **Main Menu**.

1. From a Document Search Results List, or any open document, right click and select **Collaboration | Create New Discussion**.

Note: For instructions on Retrieving Documents using the Retrieve a Document feature, Custom Queries, Envelopes or Folders, see the appendix.

The **Create New Discussion** dialog box is displayed. This is where the first post of the Discussion Thread is created.



Note: Only the first 75 characters of the document's name is displayed in the **Create New Discussion** dialog box header. If the document's name is longer than 75 characters, the entire document name can be viewed in the tool tip by scrolling the pointer over the dialog box's header.

2. Enter a name for the Discussion Thread in the **Subject** field and enter the first post of the Discussion Thread in the larger field below it. Posts may not exceed 4096 characters.

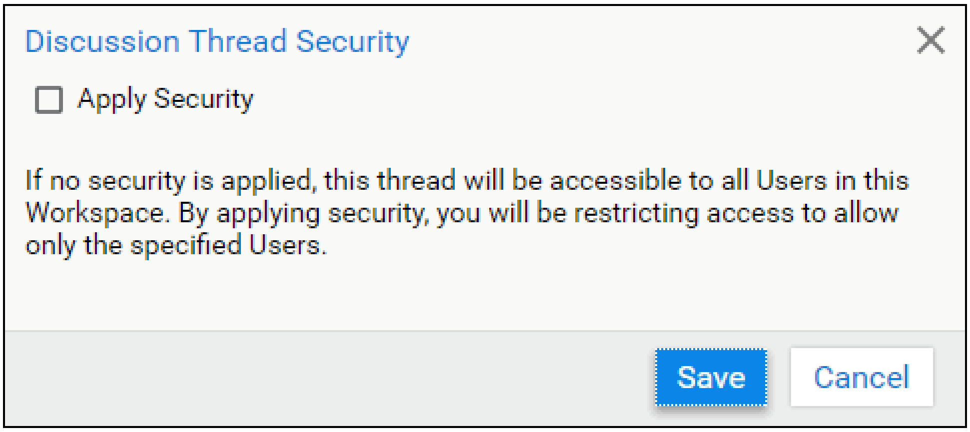
Note: Depending upon your system configuration, you may not have the **Apply Security** button. See your system administrator for questions regarding thread level security.

If necessary, click the **Clear All** button to clear the contents of the **Subject** field and the post.

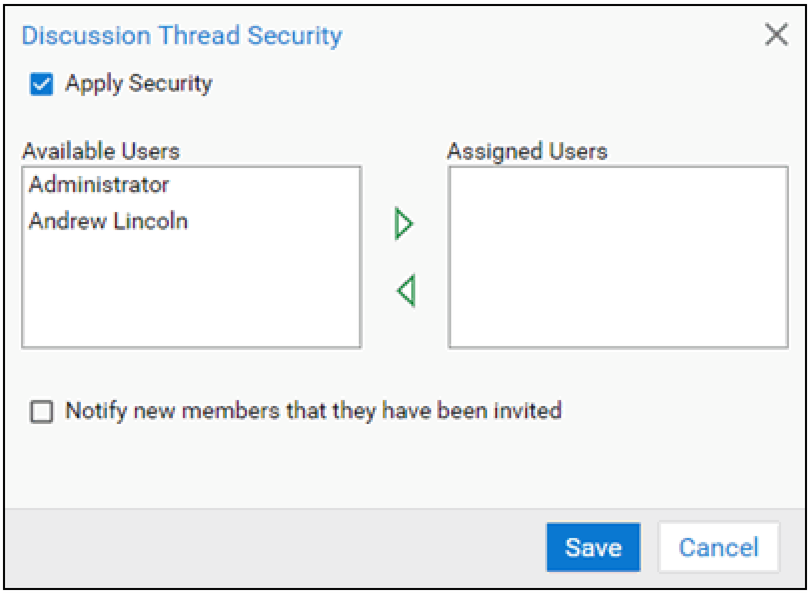
3. Click the **Apply Security** button to assign users and user groups to the Discussion Thread.

Note: Depending upon your system configuration, you may not have the **Apply Security** button. See your system administrator for questions regarding thread level security.

The **Discussion Thread Security** dialog box is displayed:



a. Select the **Apply Security** check box to assign users or user groups to the discussion thread. The user group options are displayed.



b. Give users or user groups rights to the Discussion Thread by moving them from the **Available User Groups** or **Available Users** lists to the assigned user groups or assigned users lists.

c. Select the **Notify new members that they have been invited** to inform new members of the Discussion Thread via email.

4. Click **Save** to save and close the **Discussion Thread Security** dialog box.
5. If necessary, click the **Add Attachment** button to attach an OnBase document to the Discussion Thread.
6. The **Add Attachment** dialog box is displayed.

   a. Search for any documents you would like to attach to the Discussion Thread.

   b. Once documents have been returned from your search, click the **View Document** button to view the document or the **Add Document** button to add it to the Discussion Thread.

7. Click **Save** to save the new Discussion Thread or click **Cancel** to exit the **Create New Discussion** dialog box without creating the Discussion Thread.

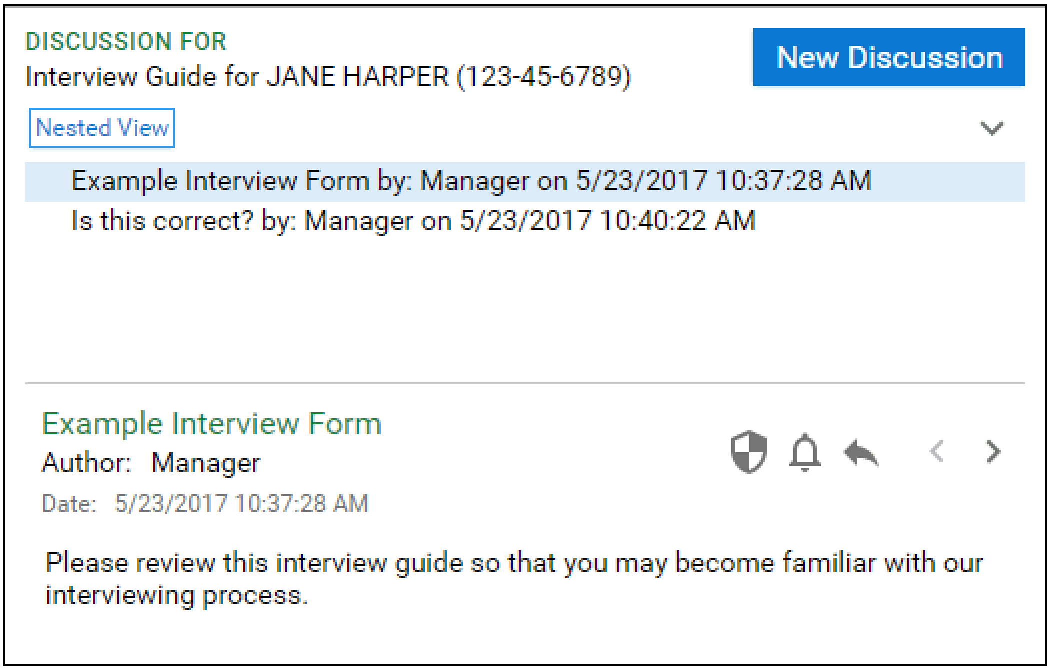
Tip: This feature is independent of a Workspace. However, if a document is in a Workspace and you want to add a Discussion Thread to it, independent of the Workspace, follow this same procedure. Your Discussion Thread will then be available from any Document Search Results list or from the open document, regardless of from where it is being viewed.

See View all Posts for a Document Independent of a Workspace on page 97 for information on obtaining document level threads from a Document Search Results list or open document.

Configuring Users for a Document Level Discussion Thread

1. Open a document level Discussion Thread.

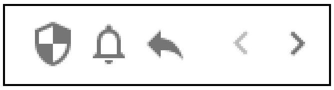
Note: See View all Posts for a Document Independent of a Workspace on page 97 for details on opening a document level Discussion Thread.



This example displays the Discussion Thread in the Threaded view. Click the **Nested View** button to display the Discussion Thread in a Nested view.

Note: Only the first 75 characters of the document's name is displayed in the **Display Discussion Threads** dialog box header. If the document's name is longer than 75 characters, the entire document name can be viewed in the tool tip by scrolling the pointer over the dialog box's header.

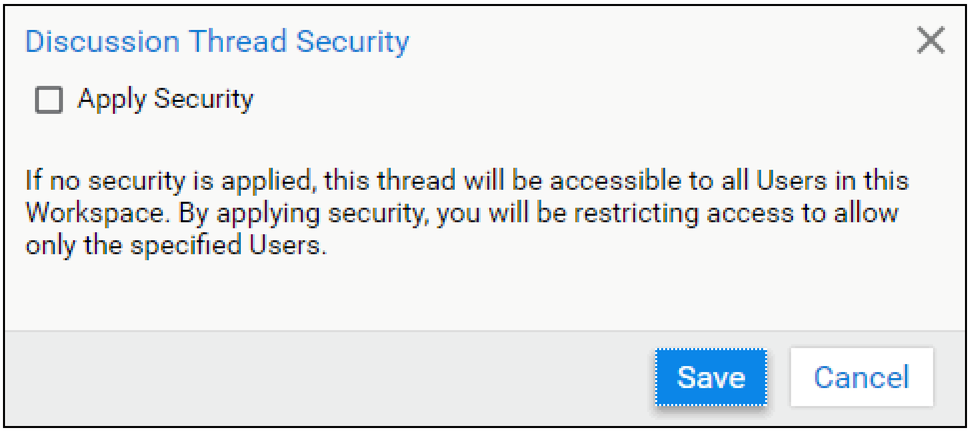
2. The Discussion Thread displays along with the following Descriptors and the Discussion Thread toolbar:
   - **Author:** User that created the Discussion Thread
   - **Date:** Date the Discussion Thread post was created
   - **Subject:** Discussion Thread name



3. Click the **Apply Security** button.

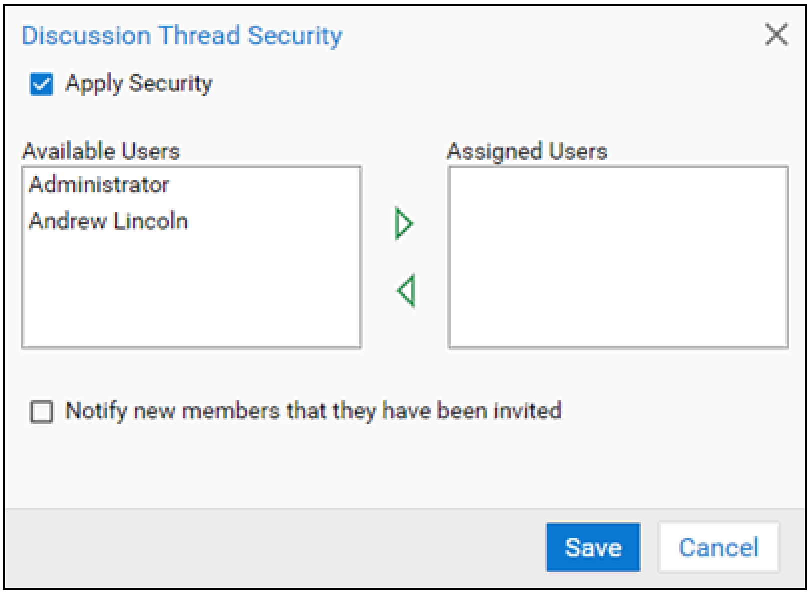
Note: Depending upon your system configuration, you may not have the Apply Security button. See your system administrator for questions regarding thread level security.

The initial **Discussion Thread Security** dialog box displays:



Note: If you do not **Apply Security** to the specified Discussion Thread, any user or user group will be able to view the Discussion Thread in that Workspace.

4. Select **Apply Security** to assign users to the Discussion Thread.



5. The **Available Users** for this Discussion Thread are all users not already assigned to the Discussion Thread.

   Select an available user and click **Add** to move them to the **Assigned Users** list.

   Repeat for all desired users. Click **Save** when finished to exit out of the Discussion Thread security dialog box.

Active Workspace

If you have administration rights to a Workspace, you can make it inactive.

You configure active Workspaces in **Configuring Workspace Options**.

If a Workspace is inactive, it will not appear in the **My Workspaces** section of the Collaboration Panel. The only way to open a closed or inactive Workspace is to search for it in a Workspace Retrieval and open it from the search results list.

See **Using Workspace Retrieval to Find a Workspace** for details.

Note: Once you elect to make a Workspace inactive, and click **Save** to save the setting, all Workspace Options will be read-only until the Workspace is active again.

WorkView Objects

Attach Document to WorkView object from Collaboration

1. From a Workspace, select a **WorkView Object**.
2. Select the **Documents** tab.
3. Click the **Attach** document button.
4. Select a document.
5. Click **OK**.

Copy Objects

1. From a Workspace, select a **WorkView Object**.
2. Click the **Copy Object** button.
3. The copy of the object will be available in WorkView.

Note: The object will not appear in Collaboration unless you assign the copy to a Workspace.

Note: If the WorkView object does not have a Class Title, its name in the Workspace will be blank. The WorkView object must be configured with a Class Title in order for OnBase to be able to correctly differentiate between multiple WorkView objects in a Workspace.

If the object is reconfigured to have a Class Title after being added to the Workspace, the object will have to be changed and saved for the Class Title to be displayed correctly.

WorkView Objects or Documents Deleted from OnBase

WorkView Objects or documents deleted from OnBase will be deleted from all Collaboration Workspaces.

Email Notifications

Email notifications can be configured in several different places:

- Template Notification Options
- Workspace Notification Options
- Discussion Thread Notification Options
- User Options

Note: If no external email address is configured, notifications will be sent to the user's internal OnBase mailbox. Internal Mail messages are limited to 250 characters. For additional information on Internal Mail, refer to your client documentation.

Template Notification Options

When Notifications are configured at the template level, they will be the default setting for all users in Workspaces created with the template, as long as **Inherit Notification Options** was selected during creation of the Workspace.

Users can override the default setting in User Options.

See your system administrator about Notification Options.

Workspace Notification Options

When Notifications are configured at the Workspace level, they will be the default setting for all users assigned to the Workspace.

Users can override the default setting in User Options.

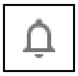
See the Notification Option in the Configuring Workspace Options on page 119 section for details.

Discussion Thread Notification Options

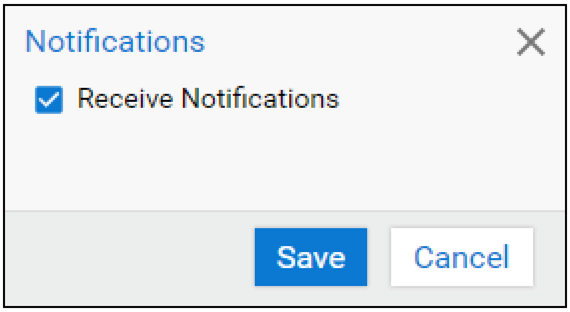
Discussion Thread Notification option provides the ability to see whether you are currently receiving notifications for a Discussion Thread or not.

Note: Creating or replying to a Discussion Thread automatically subscribes you to the notifications for that thread.

1. When viewing a Discussion Thread post, you can see whether you are currently receiving notifications for this thread by clicking the **Configure Notifications for this Thread** button.



2. The **Configure Discussion Notifications** dialog box displays.
   - If the **Receive Notifications** check box is checked, the thread is configured to send you a notification whenever someone adds a new post to the Discussion Thread.
   - If the **Receive Notifications** check box is not checked, the thread is not configured to send you a notification whenever someone adds a new post to the Discussion Thread.



3. Click **Save** to save any changes to the **Discussion Notifications** setting or **Cancel** to exit without saving changes.

User Options

Notification options set in user options override any default settings configured at the template level, the Workspace level or the Discussion Thread level.

See User Options (Overrides Default Notification Settings for All Workspaces) on page 149 for details.

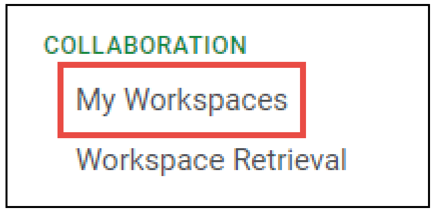
Default Limits (for example 50MB default limit)

User Options (Overrides Default Notification Settings for All Workspaces)

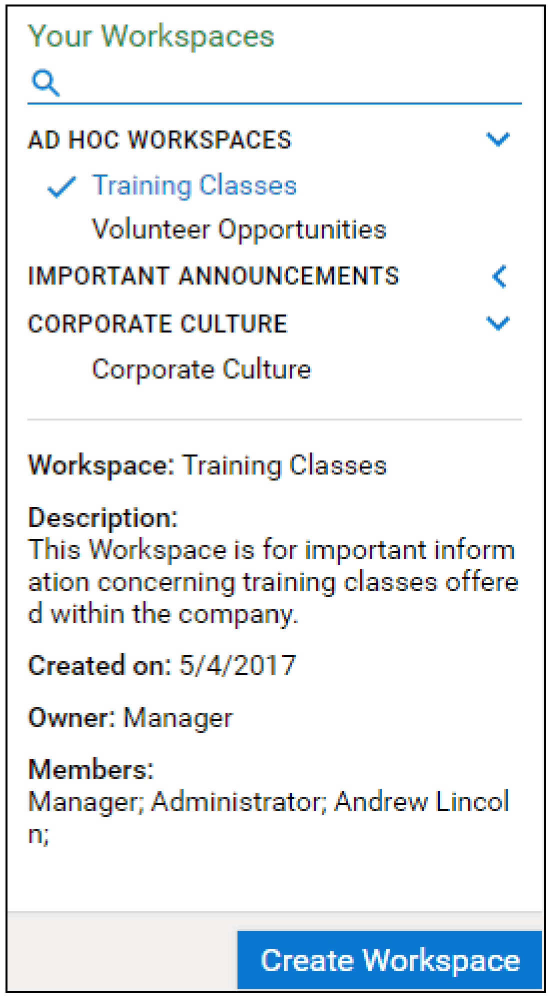
You may select your own user options for each Workspace. The options you select will override the options that are set by default.

To set your user options:

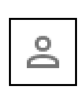
1. Click the **My Workspaces** option under **Collaboration** in the **Main Menu**.



2. From the **Your Workspaces** pane, click the desired Workspace.



3. Click the **User Options** Button.



The **Collaboration User Options** dialog box is displayed. The dialog box has two sections: the **Notify me when** options and the **Discussion Thread Options**.

Notifications	Description
Someone has posted to the workspace **Message Post Notification**	Select to send a notification to users when a new post (Discussion Thread) is added to the Workspace.
A document has been added to the workspace **New Document Notification**	Select to send a notification to users when a new document is added to the Workspace.
Notify when the document is revised	Select to notify members of a workspace if a new revision of an existing workspace document has been added. **Caution:** Notifications will only be sent if the document was revised from within the OnBase Client. If the revision occurs from within a Core-based product (for example, the Unity Client or the Web Client), no notifications will be sent.
Include the document in the notification **Attach Document To Notification**	Select to attach the new document to the new document notification.

Note: Even if users are not permitted to view documents, if a notification is configured to contain documents, the user will be able to open the document from the email notification.

Option	Description
Default View	Select the **Threaded View** radio button to display the thread in Threaded View. Select the **Nested View** radio button to display the thread in Nested View.
Collapse Nested Posts	Select the **Collapse Nested Posts** check box to collapse nested posts.
Animate Nested Posts	Select the **Animate Nested Posts** check box to animate nested posts.

4. Select the options you would like to be applied.
5. Click **Save** when finished, or **Cancel** to exit without saving.

Usage - Client

Note: These instructions describe using the Collaboration module in the OnBase Client module. See Usage - Web Client on page 90 for details on using Collaboration in the OnBase Web Client. See Usage - Unity Client on page 233 for details on using Collaboration in the Unity Client.

There are two basic types of usage for the Collaboration module:

- Workspace Collaboration on page 152
- Collaborating on Documents or WorkView Objects Independently of a Workspace on page 218

Workspace Collaboration

Workspaces provide the ability to have a central location in which to store multiple Discussion Objects. Discussion Objects consist of Discussion Threads, relevant documents or WorkView Objects from the Document Management System.

You can set user rights at the Workspace level to control access to the Workspace. In addition, you can also set user rights at the thread level to further restrict access to Discussion Threads in the Workspace, or Discussion Threads attached to documents in the Workspace.

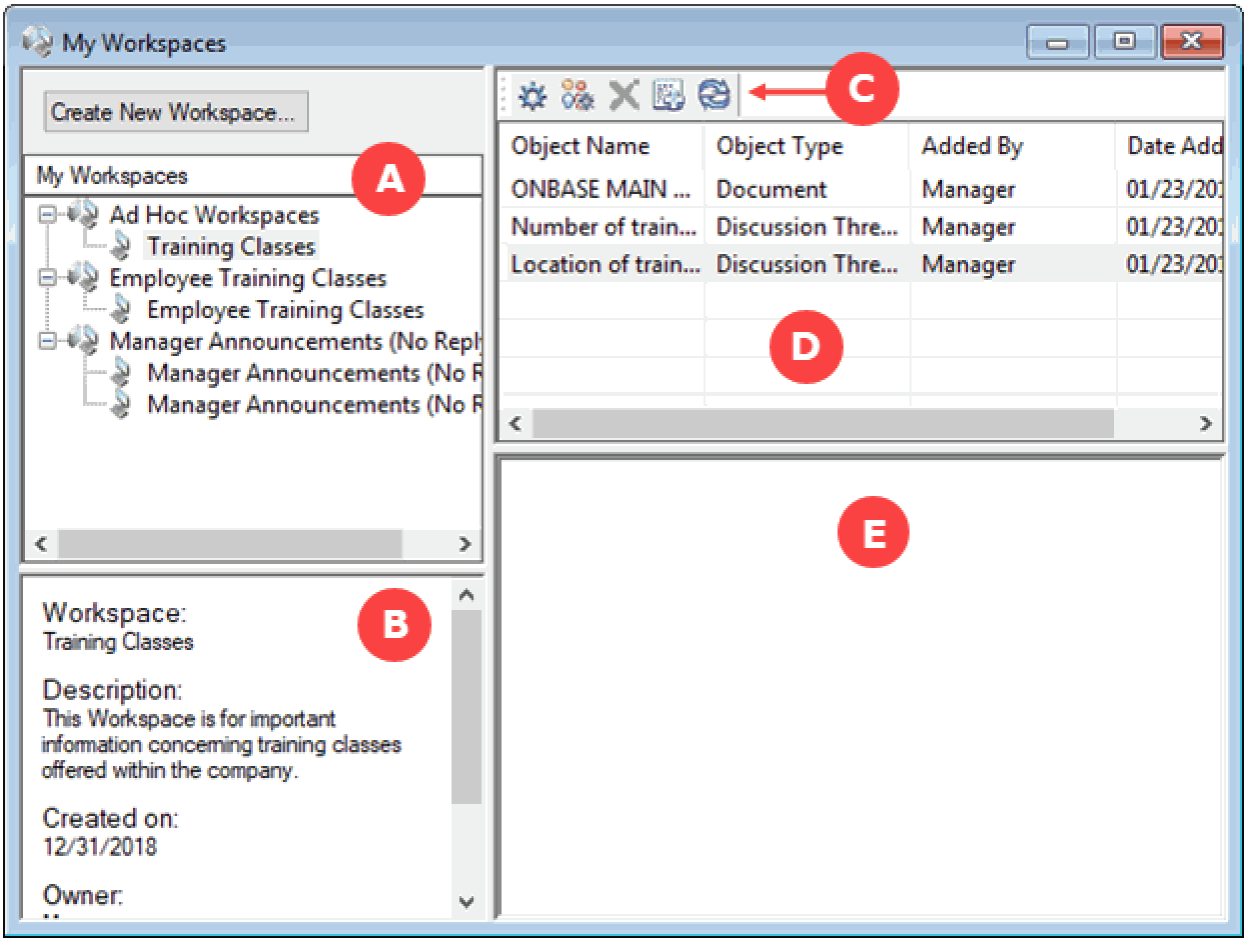
All Workspace activity can be broadcast using of e-mail notifications to Workspace users.

See the topics below for details on using the Workspace:

- Workspace Overview on page 153
- Viewing a Workspace on page 154
- Adding Documents to a Workspace on page 158
- Removing Documents from a Workspace on page 160
- Using Workspace Retrieval to Find a Workspace on page 161
- Creating a Workspace with a Template on page 165
- Creating an Ad Hoc Workspace on page 171
- Configuring Workspace Options on page 177
- Configuring User Options on page 188
- Workspace Administrators on page 190
- Discussion Thread Overview on page 192
- Adding a New Discussion Thread on page 194
- Replying to a Post in a Discussion Thread on page 203
- Applying Security Settings to a Discussion Thread on page 209
- Subscribing to Notifications for a Discussion Thread on page 213

Workspace Overview

Workspaces can be accessed in the **My Workspaces** window in the OnBase Client. The **My Workspaces** window contains all available workspaces the user can access.



The following table describes the components of the **My Workspaces** window.

Section Name	Description
A | My Workspaces pane	Contains all created workspaces that can be viewed by a user. The **My Workspaces** pane is organized by the templates from which they were created. Documents not created with a template are listed under **Ad Hoc Workspaces**.
B | Workspace Information pane	Contains information about the selected workspace including the workspace name, description, creation date, owner, and its members.
C | Workspace toolbar	Contains options for the selected workspace, such as creating a new workspace or modifying workspace options.

Section Name	Description
D | Object pane	Contains all objects added to a workspace including discussion threads and documents.
E | Object viewer	Displays object information such as a document, WorkView object, or discussion thread.

The following table describes the buttons available in the workspace toolbar:

Button Name	Description
Workspace Options	Configure options for the workspace including workspace rights, user membership, and workspace details. For more information on creating a workspace, see Configuring Workspace Options on page 177.
User Options	Configure notification options for the logged in user. For more information on these notification options, see Configuring User Options on page 188.
Remove From Workspace	Remove a document from a workspace.
Create New Discussion	Add a new discussion thread to the workspace. For more information on adding a new discussion thread, see Adding a New Discussion Thread on page 194.
Refresh	Refresh the workspace to see newly imported documents or new discussion threads.

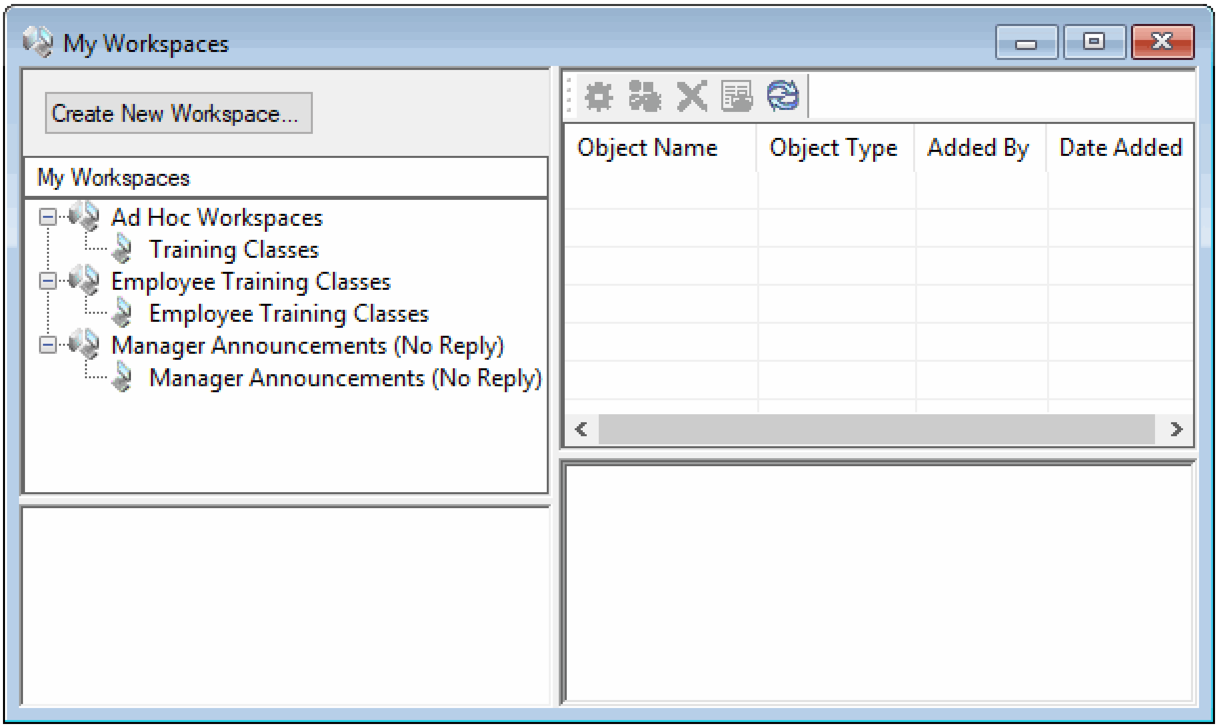
Viewing a Workspace

A workspace can be viewed if you are added as a member of the workspace. Workspaces may contain discussion threads, WorkView objects, or documents.

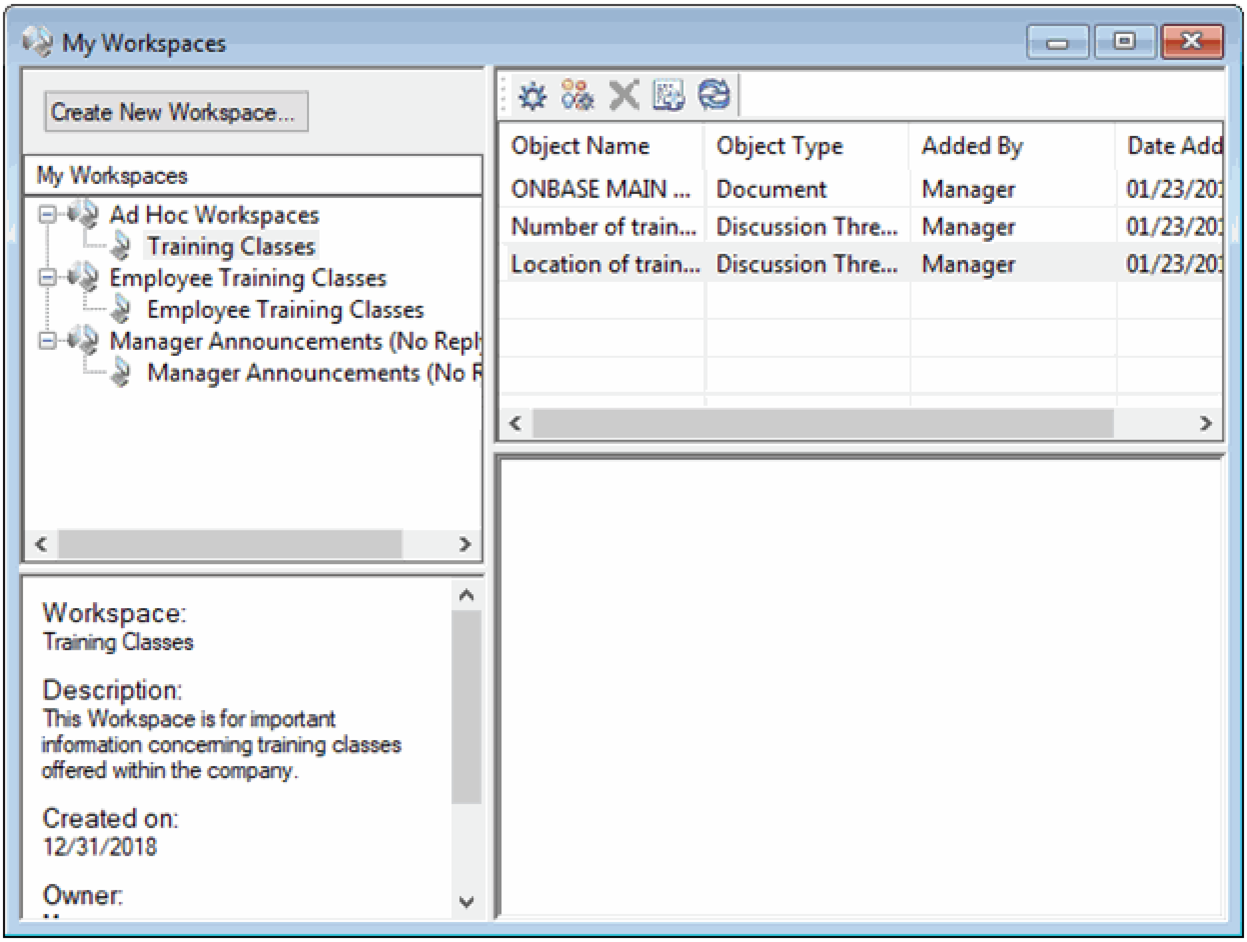
Note: For information on creating a new workspace, see Creating a Workspace with a Template on page 165.

To view a workspace:

1. Select **User | Collaboration | Collaboration Workspaces**. The **My Workspaces** window is displayed.



2. From the **My Workspaces** pane, select the workspace you want to view. The workspace information and objects are displayed.

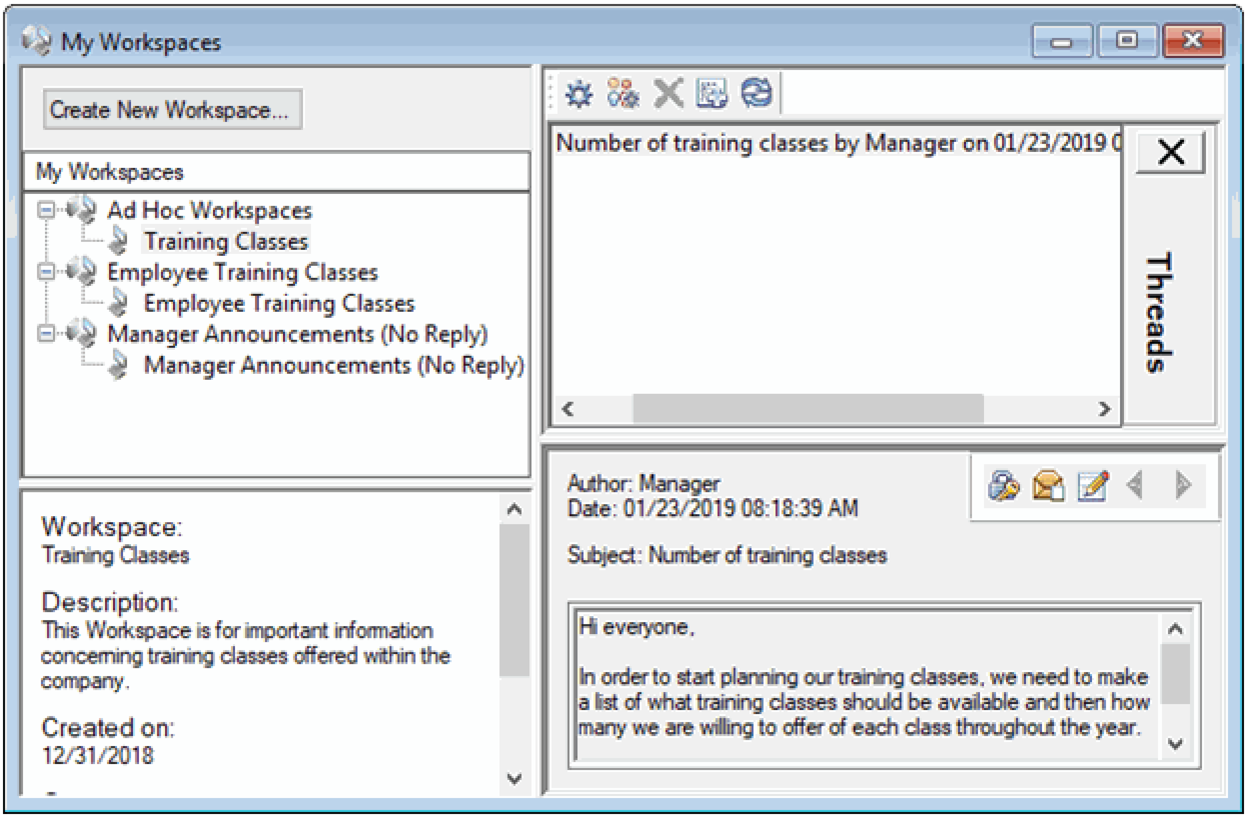


The object pane is sorted into columns of information. The following table describes each column:

Column Name	Description
Object Name	The name of the discussion thread, WorkView object, or document. **Note:** Discussion thread names are limited to 200 characters.
Object Type	The type of object that is displayed when selected. Each object type is displayed differently.
Added By	The user name of the user who added the object to the workspace. **Note:** If a user who added the object was deleted from the system, **(deactivated)** is displayed next to the user name.

Column Name	Description
Date Added	The date the object was added.

3. From the object pane, double-click an object in the list. The object is displayed in the object viewer or a separate window, depending on the **Object Type**.



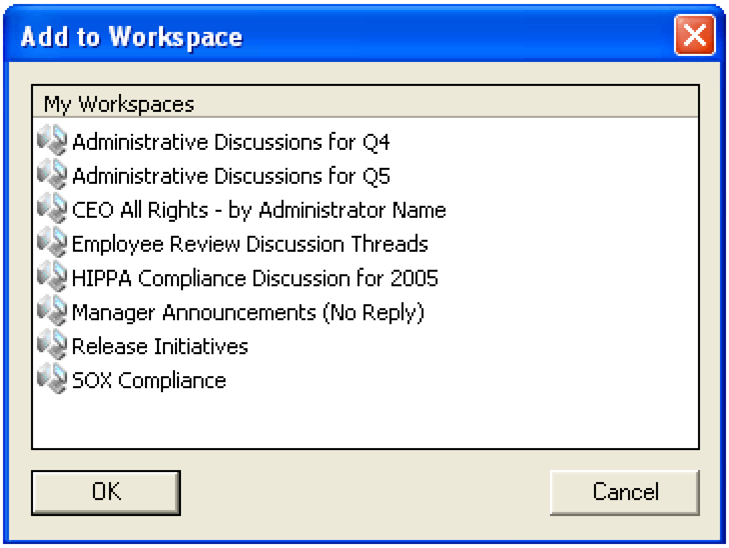
- Discussion threads and posts are displayed in the object viewer. For more information on viewing a discussion thread, see
- WorkView objects are displayed in a separate viewer. See the **WorkView | Case Manager** module reference guide for more information on viewing a WorkView object in the OnBase Client.
- Documents are displayed in the object viewer and function the same as in the OnBase viewer.

Adding Documents to a Workspace

You can add documents to a workspace to share with other users.

Note: You must have rights to the Document Type to add the document to a workspace.

1. Access a document in one of the following ways:
   - An unopened document from a Document Search Results list
   - An open document
2. Right-click on the open document or the document listed in the Document Search Results list and select **Collaboration | Add to Workspace**. The **Add to Workspace** dialog box is displayed.



3. Select the workspace to where the document should be added.
4. Click **OK**. The document is added to the selected workspace.

Adding Documents to a Workspace During Document Import

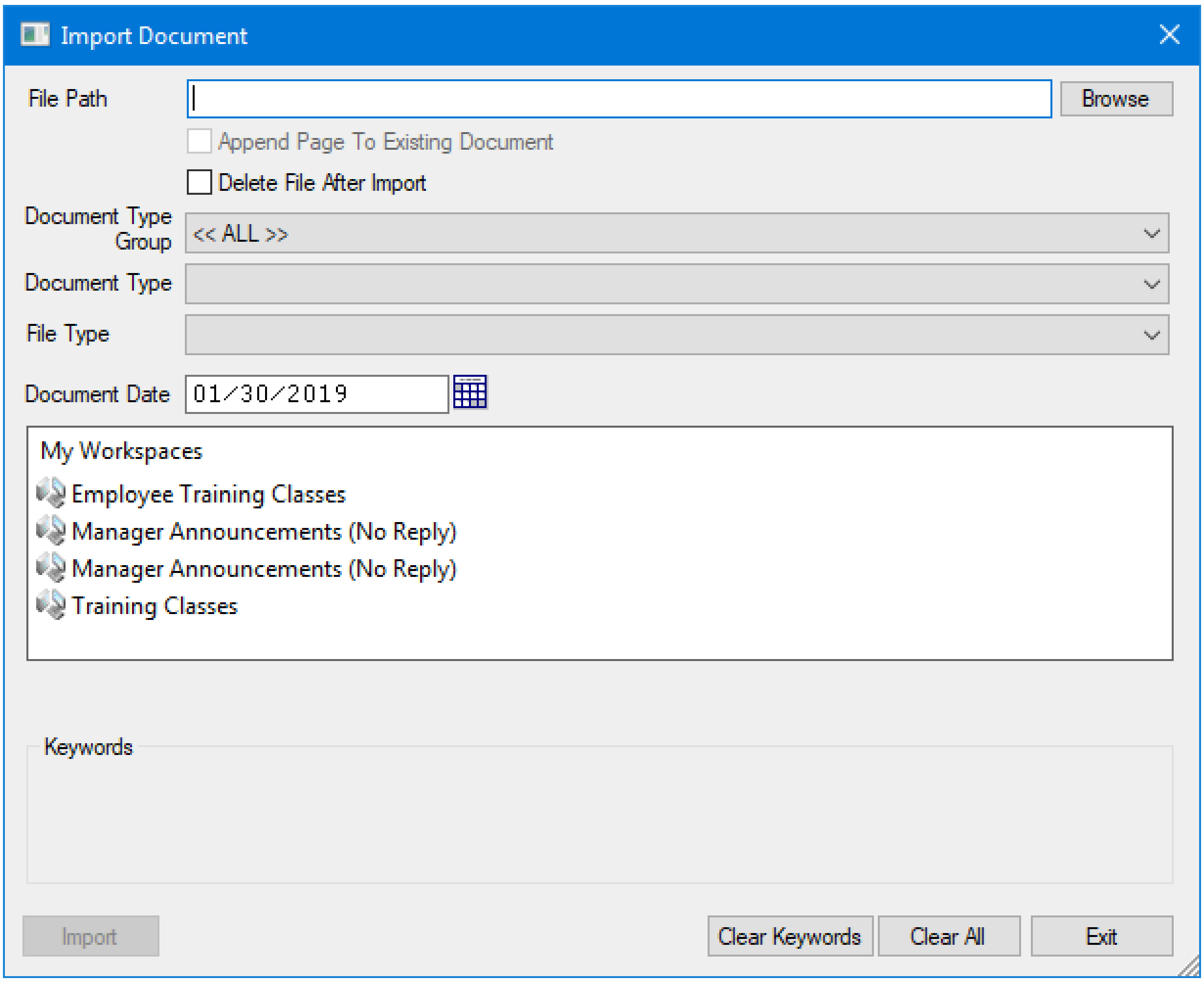
You can add a document to a workspace directly upon importing it into OnBase.

To add a document to a workspace during document import:

1. Import a document into OnBase by one of the following ways:
    - Select **File | Import**
    - Drag and drop the file onto the OnBase desktop
    - Click the **Import Documents** button on the OnBase Client toolbar

Note: For more information on importing documents, see the OnBase Client documentation.

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



2. Enter the necessary information for importing the document.
3. From the **My Workspaces** pane, select a workspace in the list to where the document should be added.

Note: The workspaces listed in the **My Workspaces** pane are workspaces you have rights to.

4. Click **Import**.

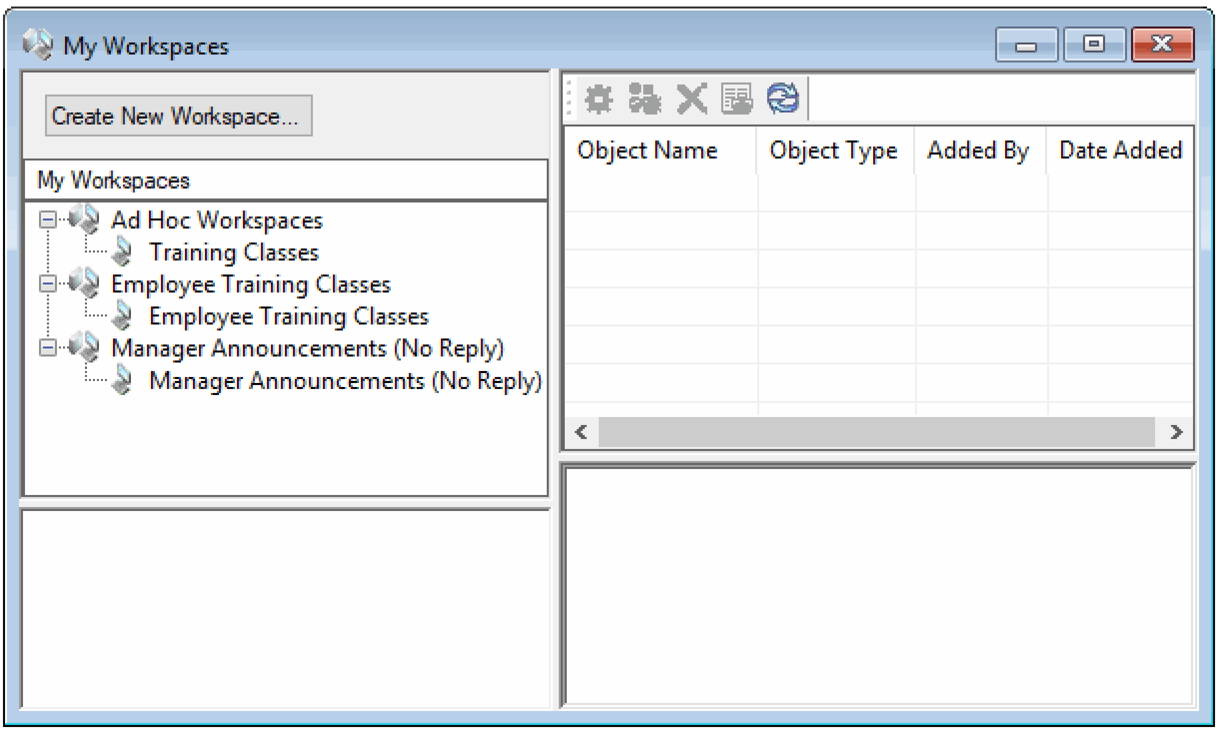
Note: If the workspace is open when you add a new document, you must click the **Refresh** button to view the added document. See Viewing a Workspace on page 154 for more information on the **Refresh** button.

Removing Documents from a Workspace

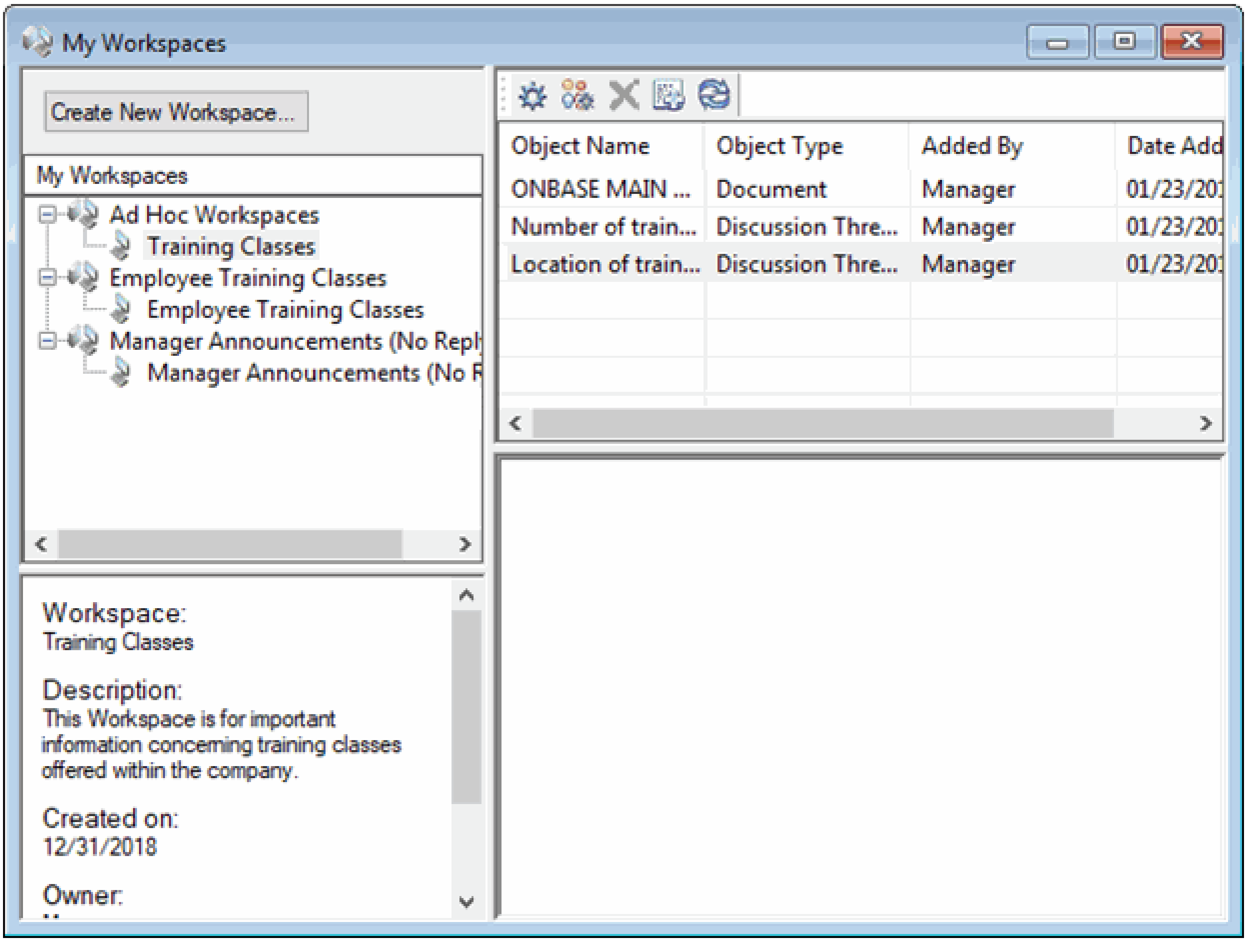
You can remove an added document from a workspace.

To remove a document from a workspace:

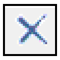
1. Select **User | Collaboration | Collaboration Workspaces**. The **My Workspaces** window is displayed.



2. Select a workspace from the **My Workspaces** pane that contains the document you want to remove. The workspace information and objects are displayed.



3. Select the document you want to remove from the workspace from the object pane.
4. Click the **Remove from Workspace** button from the workspace toolbar.



The **Confirmation** dialog box is displayed.

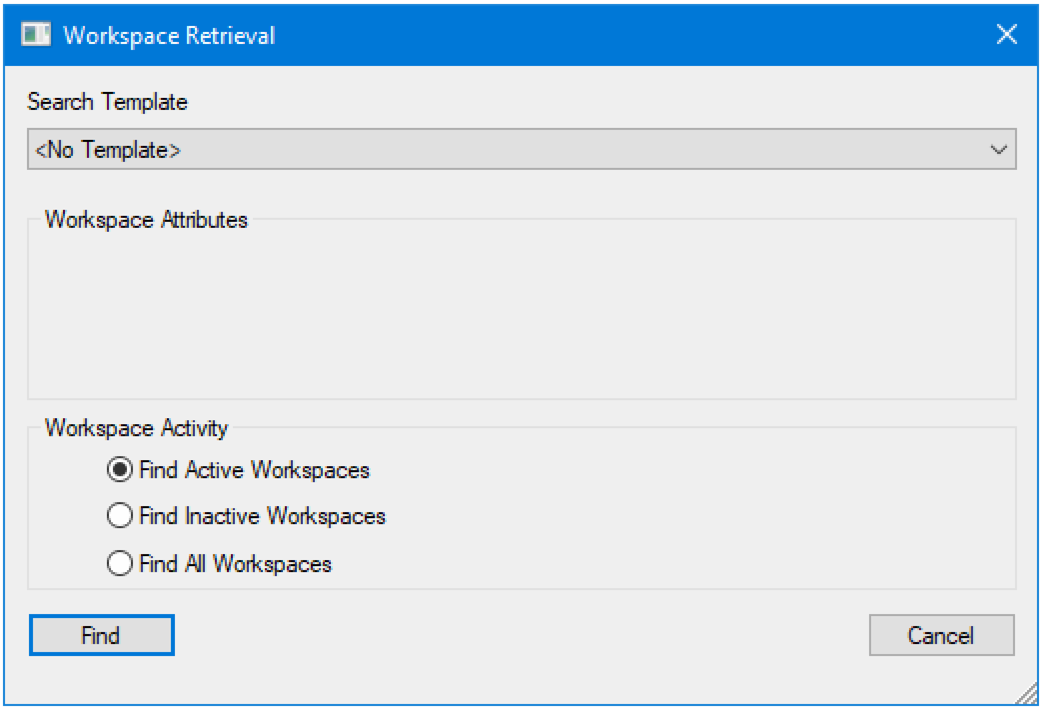
5. Click **Yes** to remove the document from the workspace.

Using Workspace Retrieval to Find a Workspace

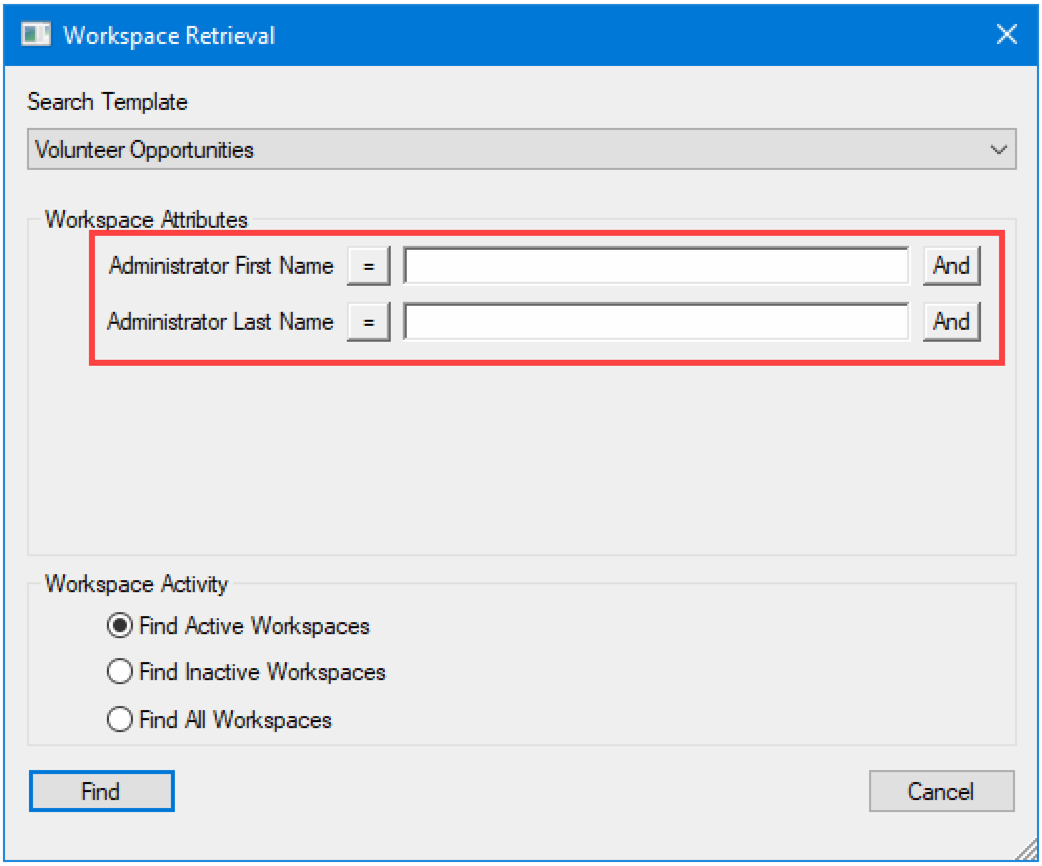
If you are a member or have rights to a lot of workspaces, you can find specific workspaces by using workspace retrieval.

To find a workspace using workspace retrieval:

1. Select **User | Collaboration | Find Workspaces**. The **Workspace Retrieval** dialog box is displayed.



2. From the drop-down list, select the template from which the workspace was created. Depending on the template configuration, workspace attributes may be displayed in the **Workspace Attributes** section.



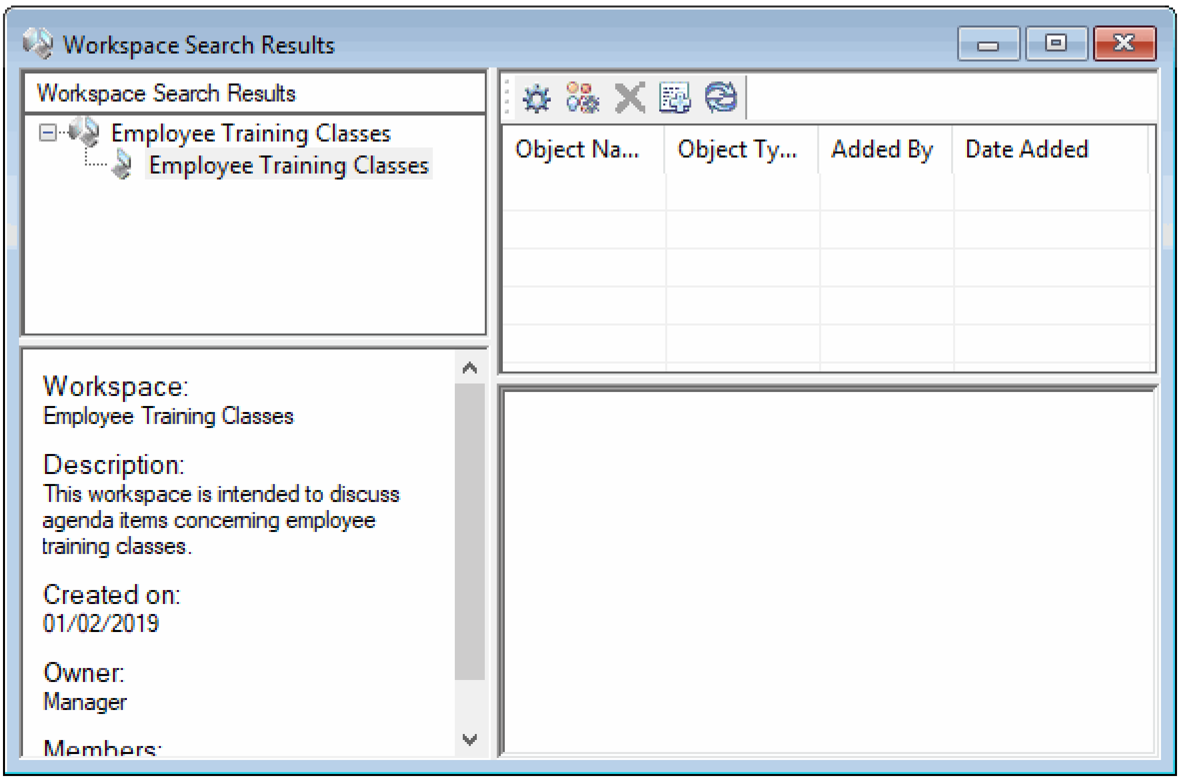
3. Enter values into the attribute fields displayed. If you want to use wildcards, see Wildcard Options for Workspace Retrieval on page 164 for details on what wildcards are supported.
   Ensure the attribute value matches its data type and data type requirements. The following table lists the attribute requirements:

Setting	Description
Alphanumeric	The maximum amount of characters allowed is 250. In the **Maximum Length** field, enter the maximum amount of characters for the alphanumeric attribute.
Date & Time	Must be a valid date and time. If no value is provided, 1964-01-01 00:00:00.000 is stored.
Numeric	The valid range for a numeric attribute is -2147483648 to 2147483647.

4. Select one of the following types of workspaces to find:

Option	Description
Find Active Workspaces	Select to find only workspaces that are active.
Find Inactive Workspaces	Select to find only workspaces that are inactive.
Find All Workspaces	Select to find both active and inactive workspaces.

5. Click **Find**. The workspaces matching the search criteria are displayed in the **Workspace Search Results** window.



6. Select the workspace you were searching for. You can view and work in the selected workspace, just as you would in the **My Workspaces** dialog box.

Wildcard Options for Workspace Retrieval

Wildcard characters (* or ?) can help you find workspaces by expanding your search results.

Note: Only the alphanumeric data type is supported for a wildcard search.

Type one of the following wildcard characters into the attribute field when searching for workspaces to search with values containing one or more unspecified characters:

Wildcard	Description
*	The * wildcard character can replace several characters within a search value. For example, the value OLS* would retrieve all instances of Olsen, Olsted, and Olswood.
?	The ? wildcard character can replace a single character within a search value. For example, the value SM?TH would retrieve instances of both Smith and Smyth.

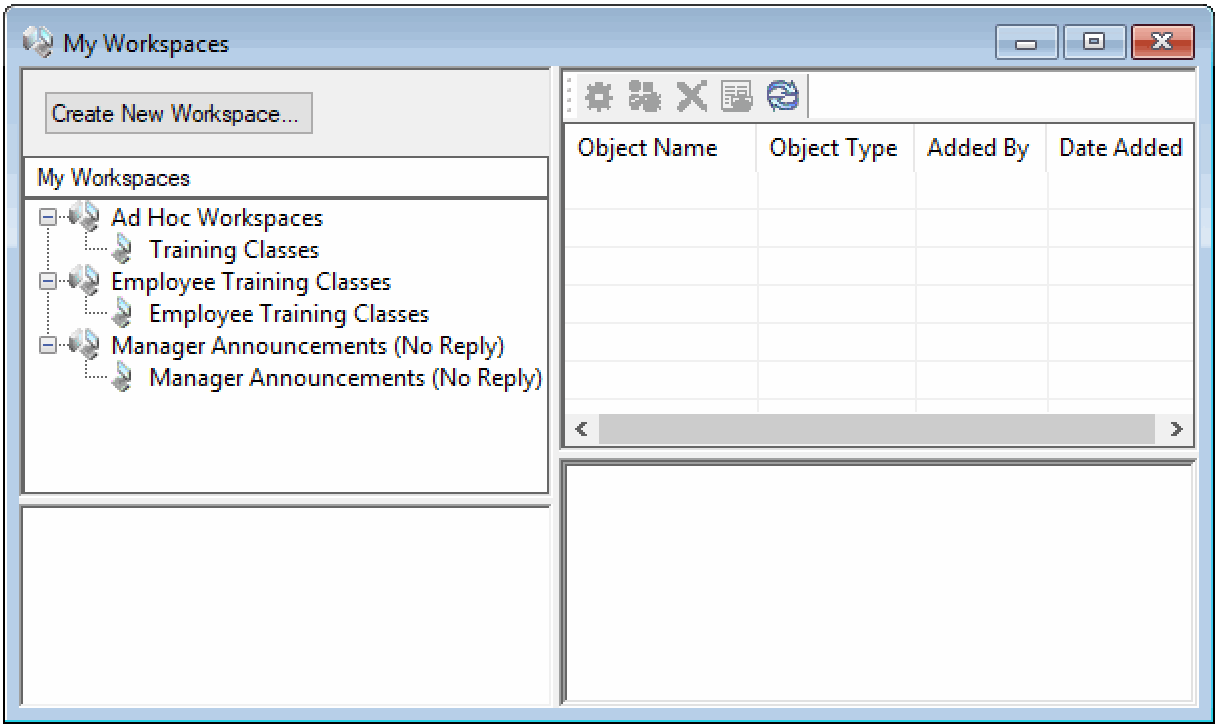
The * and **?** characters in names are always used as wildcards in the Workspace Retrieval function. Single quotes (') and double quotes (") are not supported. Alphanumeric entries without * or **?** are considered as literal (function as in quotes).

Creating a Workspace with a Template

You can create a workspace to combine discussions, documents, or WorkView objects from multiple team members into one space. You can create a workspace with a pre-configured template. When you create a workspace, you are automatically the administrator of that workspace.

To create a workspace using a template:

1. Select **User | Collaboration | Collaboration Workspaces**. The **My Workspaces** window is displayed.

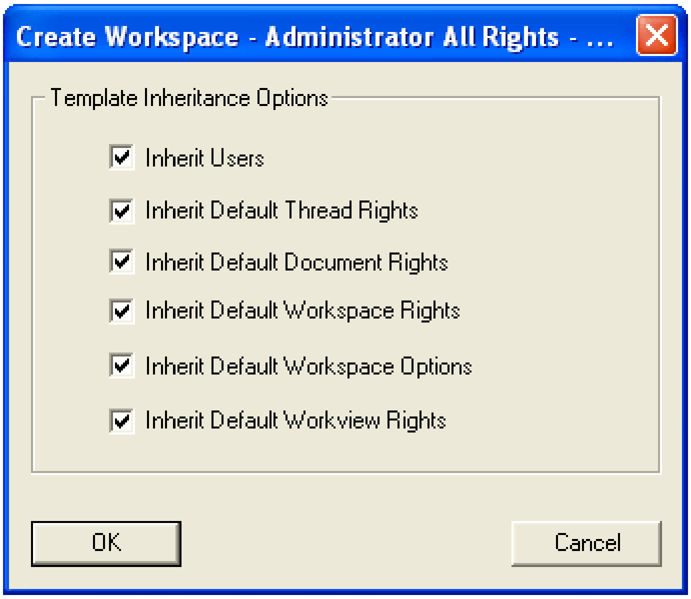


2. Click the **Create New Workspace** button.

3. Select a template from which to create the workspace.

Note: Although the templates have pre-configured options, as the owner of the workspace, you can change these configurations as needed.

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



4. Select all default settings from the template that you want your workspace to inherit.

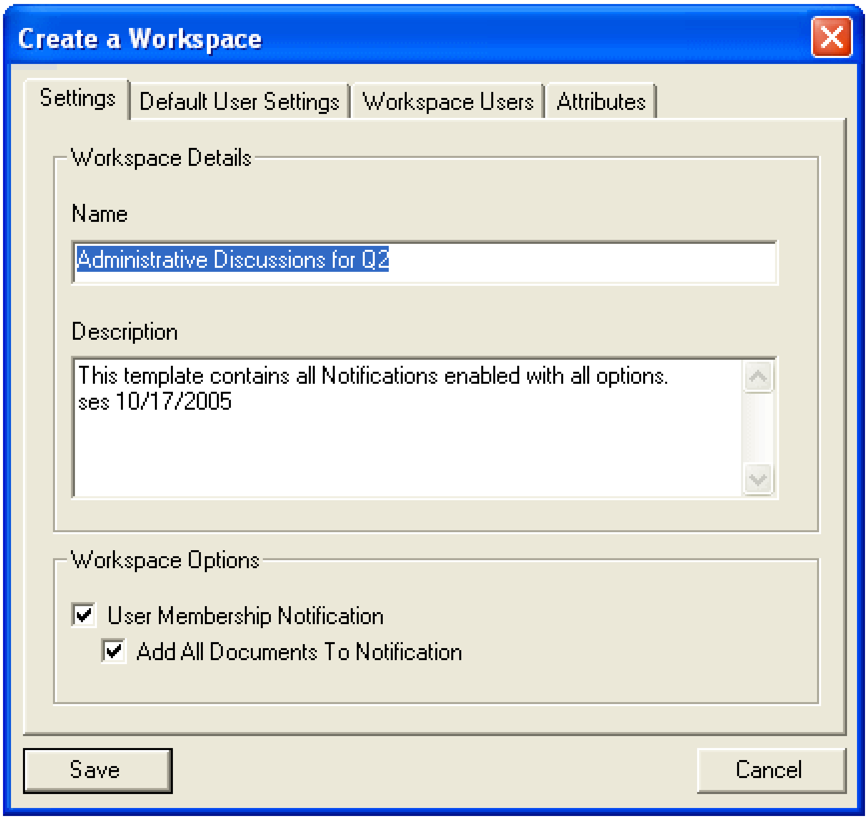
Note: You can individually add or remove settings after the inherit settings are selected.

The following are the available options:

Inherit Setting	Description
Inherit Users	Allows users with access to the template workspace access to this workspace.
Inherit Default Thread Rights	Enables options for specific rights regarding discussion threads. This includes reading, replying, and posting new discussion threads in the workspace.
Inherit Default Document Rights	Enables options to specific actions a user can take with documents in a workspace. This includes adding, viewing, removing, and modifying documents.
Inherit Default Workspace Rights	Enables the option to allow new members of the workspace to have administrator rights.
Inherit Default Workspace Options	Enables options for specific notifications emailed to users.
Inherit Default WorkView Rights	Enables options for specific rights regarding WorkView objects. This includes adding, viewing, and removing WorkView objects in the workspace. **Note:** You must be licensed for WorkView to use WorkView objects in Collaboration. See the **WorkView** documentation for details on WorkView objects.

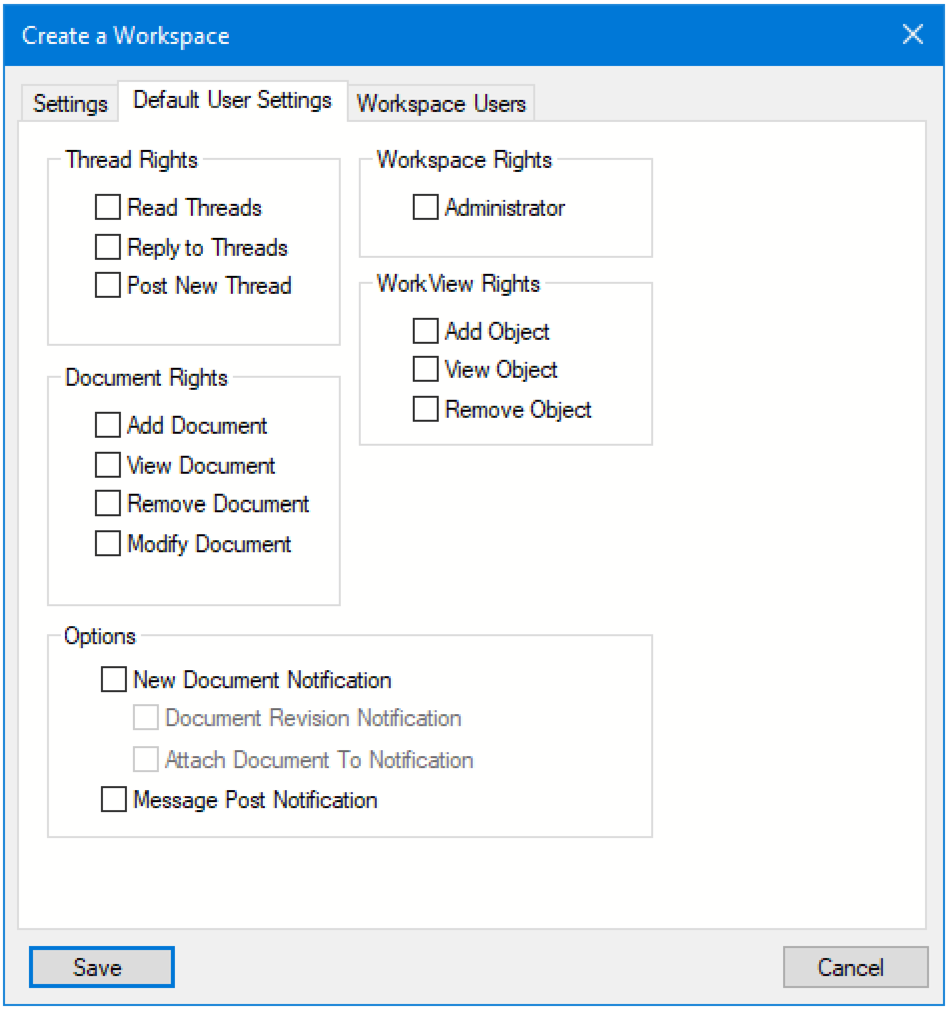
Note: Once a workspace is created, any default settings can be updated from within the workspace from the **Workspace Options** button. For more information on updating settings from a created workspace, see Configuring Workspace Options on page 177.

5. Click **OK**. The **Create a Workspace** dialog box is displayed.



6. Click the **Settings** tab. The **Name**, **Description**, and **Welcome Message** fields are displayed and entered according to the template you selected.
7. Edit the name of the workspace in the **Name** field as needed.
8. Edit the description of the workspace in the **Description** field as needed.
9. Edit the welcome message for the workspace in the **Welcome Message** field as needed.
10. Select **User Membership Notification** to notify new users that they were invited to the workspace.
11. Select **Add all Documents to Notification** to attach all workspace documents to the notification email.

12. Click the **Default User Settings** tab. A list of options for member rights in the workspace are displayed.



13. Select the appropriate rights for the members of this workspace. Any rights selected here are applied to all members of the workspace.

Note: You can edit rights for individual members under the **Workspace Users** tab.

For more information on workspace member rights, see the following sections:

- Thread Rights on page 182
- Document Rights on page 182
- Workspace Rights on page 183
- WorkView Rights on page 183
- Notification Options on page 183

14. Click the **Workspace Users** tab. A list of available users to add as members to the workspace is displayed.

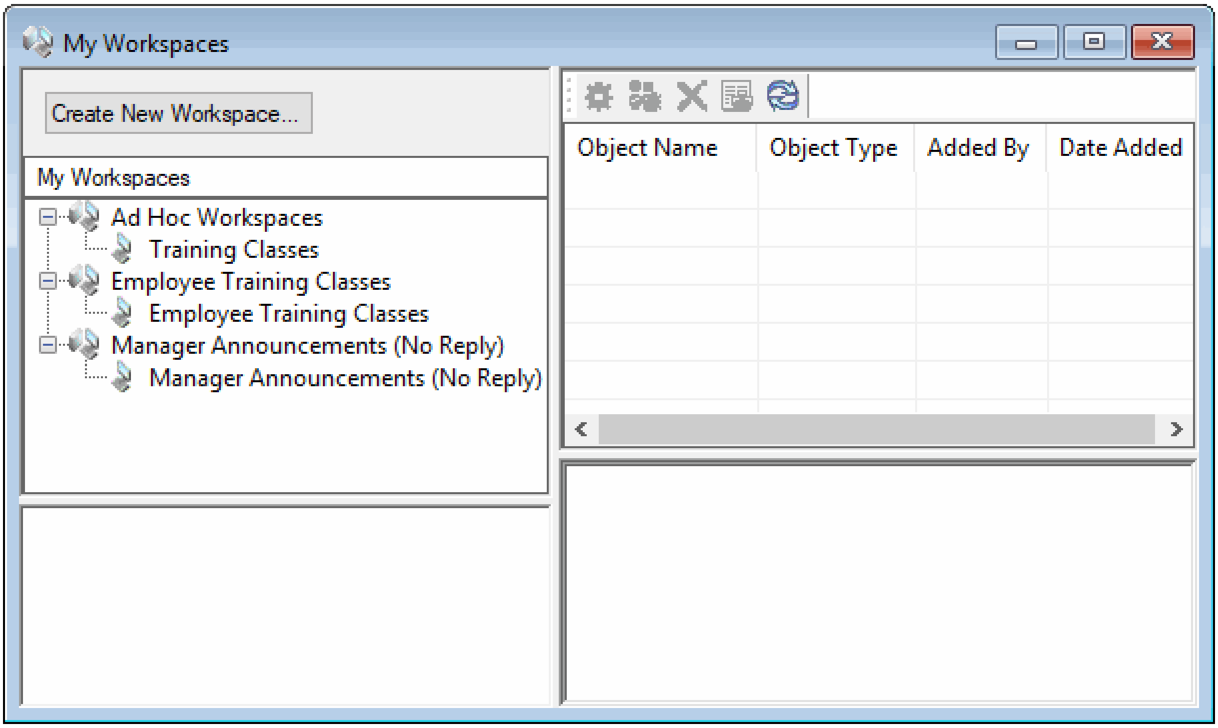
15. Select any users you want to add to the workspace from the **Available Users** list.
16. Click the **Add** button. The users are now moved to the **Selected Users** list.
17. Select a user from the **Selected Users** list and click the **Rights** button. The **Collaboration Rights** dialog box for the user is displayed.
18. Select or deselect any rights that the selected user should have or not have.
19. Click **Save**.
20. With the user still selected, click the **Options** button. The **Collaboration User Options** dialog box is displayed.
21. Select or deselect any notification options for the selected user.
22. Click **Save**.
23. Click the **Attributes** tab. All configured attributes for the workspace are displayed.
24. Enter a useful attribute value for all listed attributes. Attribute values can be searched when searching and retrieving workspaces. For more information on workspace retrieval, see Using Workspace Retrieval to Find a Workspace on page 161.
25. Click **Save**. Your workspace is created and added to the **My Workspaces** pane.

Creating an Ad Hoc Workspace

You can create an ad hoc workspace, or a workspace that does not use a pre-configured template. When you create a workspace, you are automatically the administrator of that workspace.

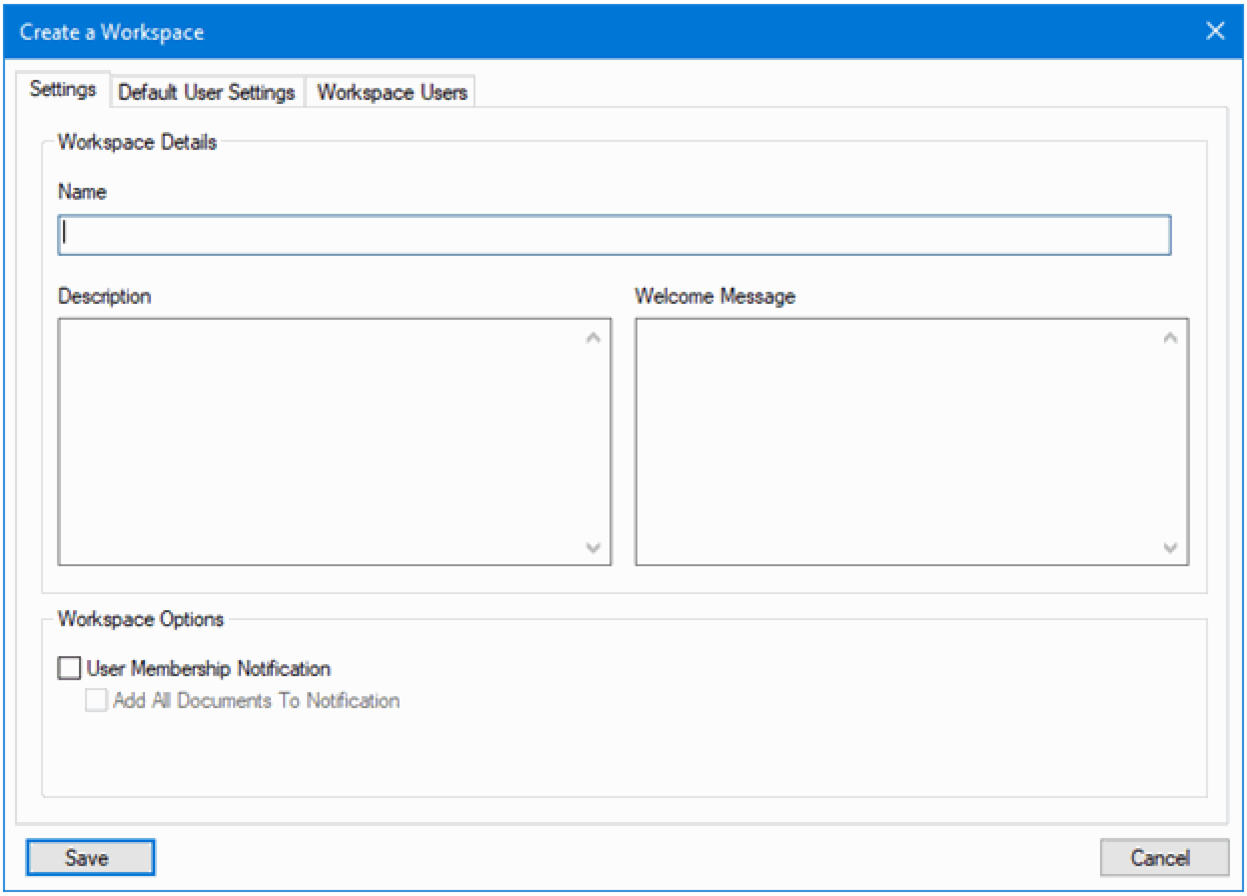
To create an ad hoc workspace:

1. Select **User | Collaboration | Collaboration Workspaces**. The **My Workspaces** window is displayed.



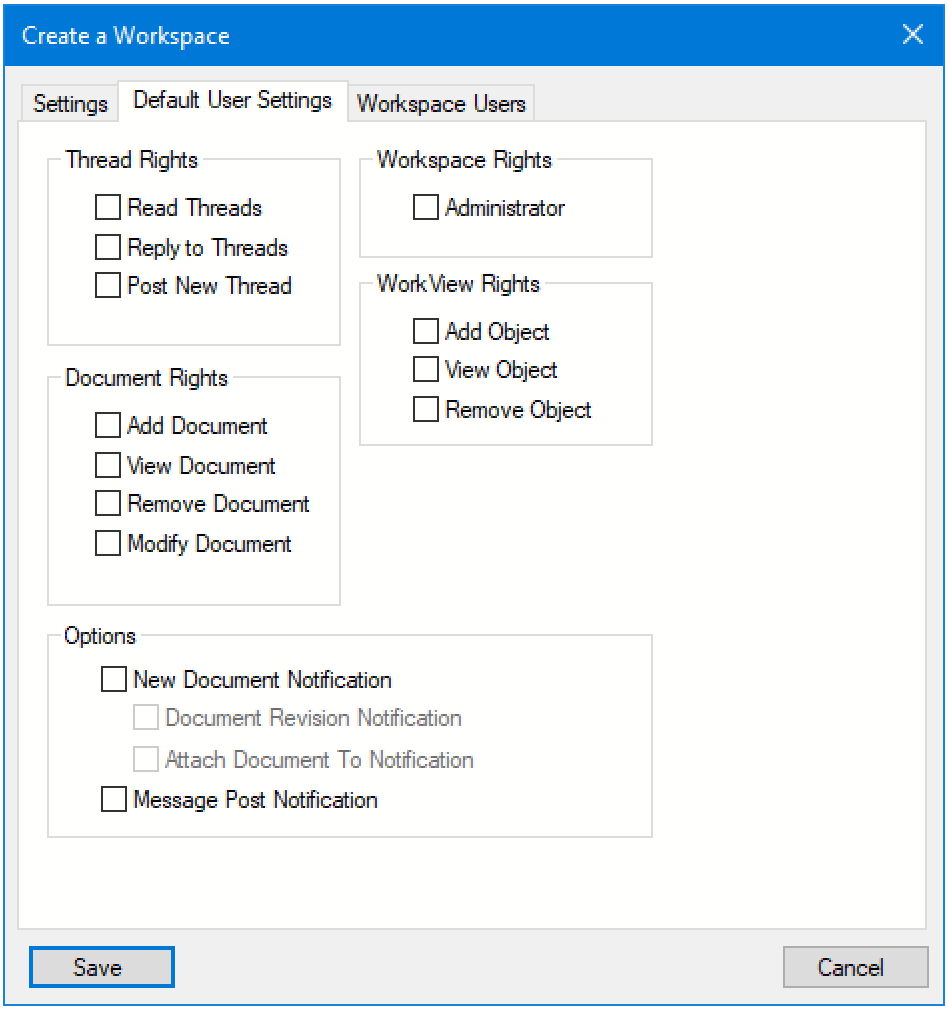
2. Click the **Create New Workspace** button. A drop-down list of options are displayed.

3. Select **Create Without Template**. The **Create a Workspace** dialog box is displayed.



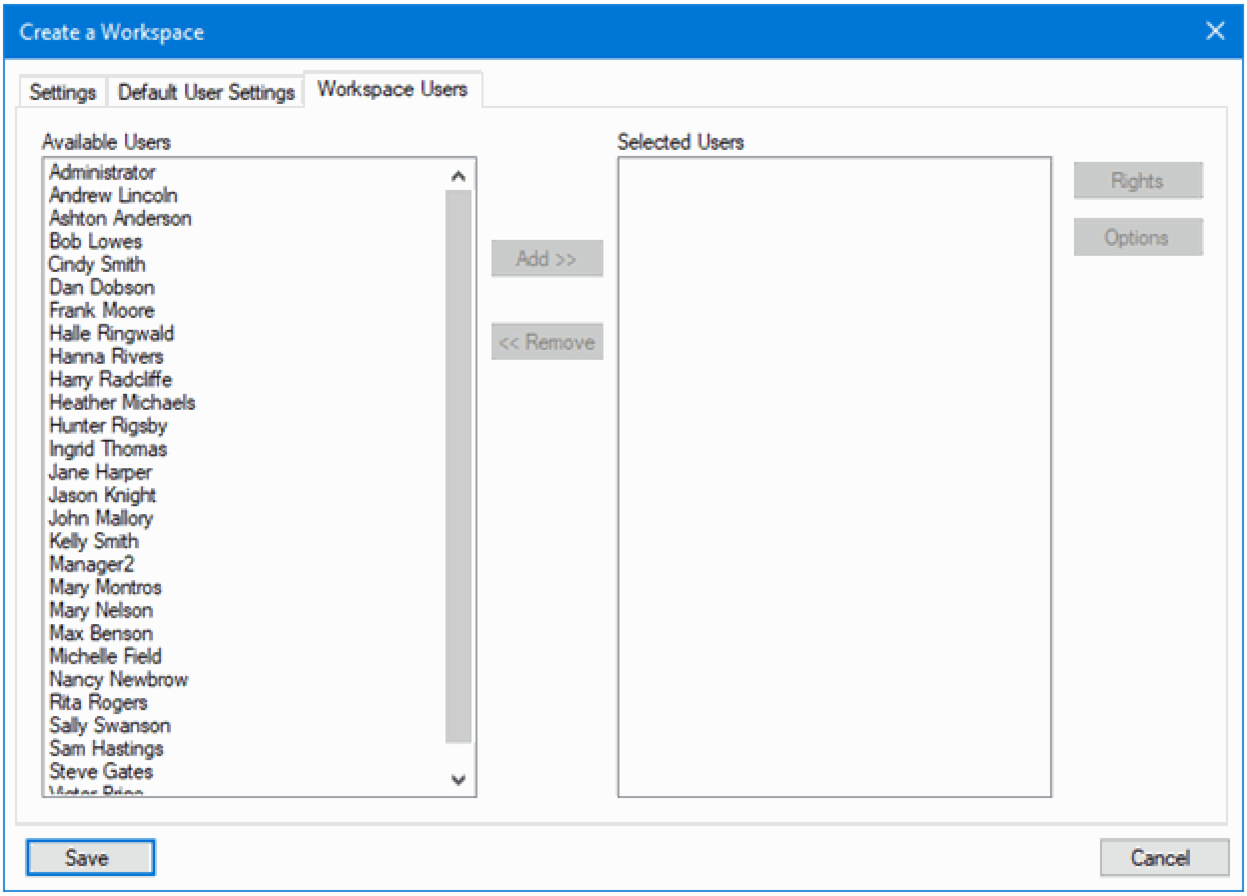
4. Click the **Settings** tab. The **Workspace Details** and **Workspace Options** sections are displayed.
5. In the **Workspace Details** section, enter the name of the workspace in the **Name** field.
6. Enter a description of the workspace in the **Description** field.
7. Enter a welcome message in the **Welcome Message** field.

8. Click the **Default User Settings** tab. All configurable rights to the workspace are displayed.



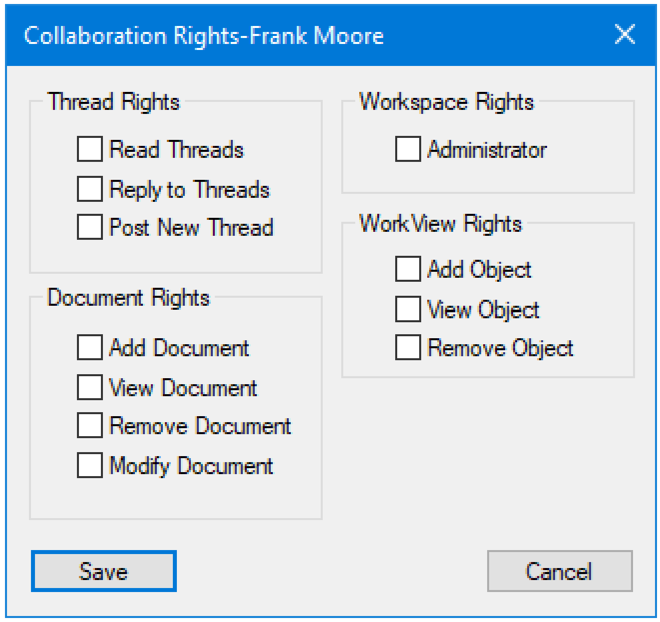
9. Select all rights you want to give to all members of the workspace. For more information on these rights, see the following sections:
   - Thread Rights on page 182
   - Document Rights on page 182
   - Workspace Rights on page 183
   - WorkView Rights on page 183
   - Notification Options on page 183

10. Click the **Workspace Users** tab. A list of available users to add as members to the workspace is displayed.

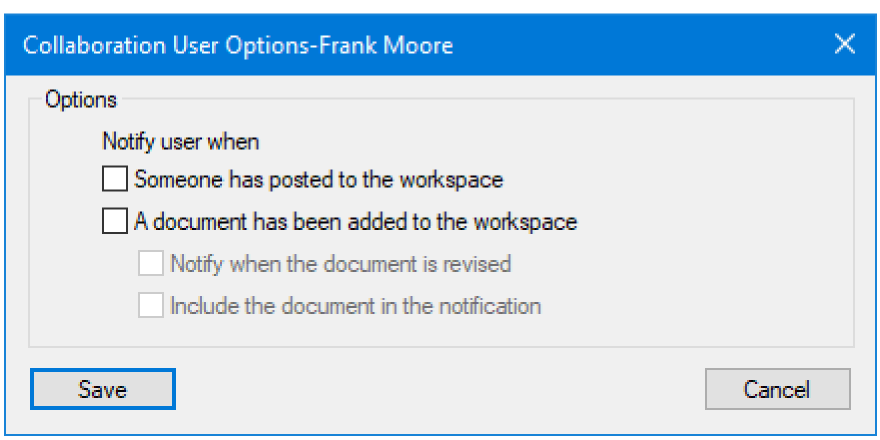


11. Select any users you want to add to the workspace from the **Available Users** list.
12. Click the **Add** button. The users are now moved to the **Selected Users** list.

13. Select a user from the **Selected Users** list and click the **Rights** button. The **Collaboration Rights** dialog box for the user is displayed.



14. Select or deselect any rights that the selected user should have or should not have. For more information on these rights, see the following sections:
    - Thread Rights on page 182
    - Document Rights on page 182
    - Workspace Rights on page 183
    - WorkView Rights on page 183
15. Click **Save**.
16. With the user still selected, click the **Options** button. The **Collaboration User Options** dialog box is displayed.



17. Select or deselect any notification options for the selected user. For more information on these notification options, see

18. Click **Save**.
19. From the **Create a Workspace** dialog box, click **Save**. Your workspace is created and added to the **My Workspaces** pane under **Ad Hoc Workspaces**.

Configuring Workspace Options

You can configure workspace options during workspace creation and edit any configurations after a workspace is created. You can access workspace options in one of two ways:

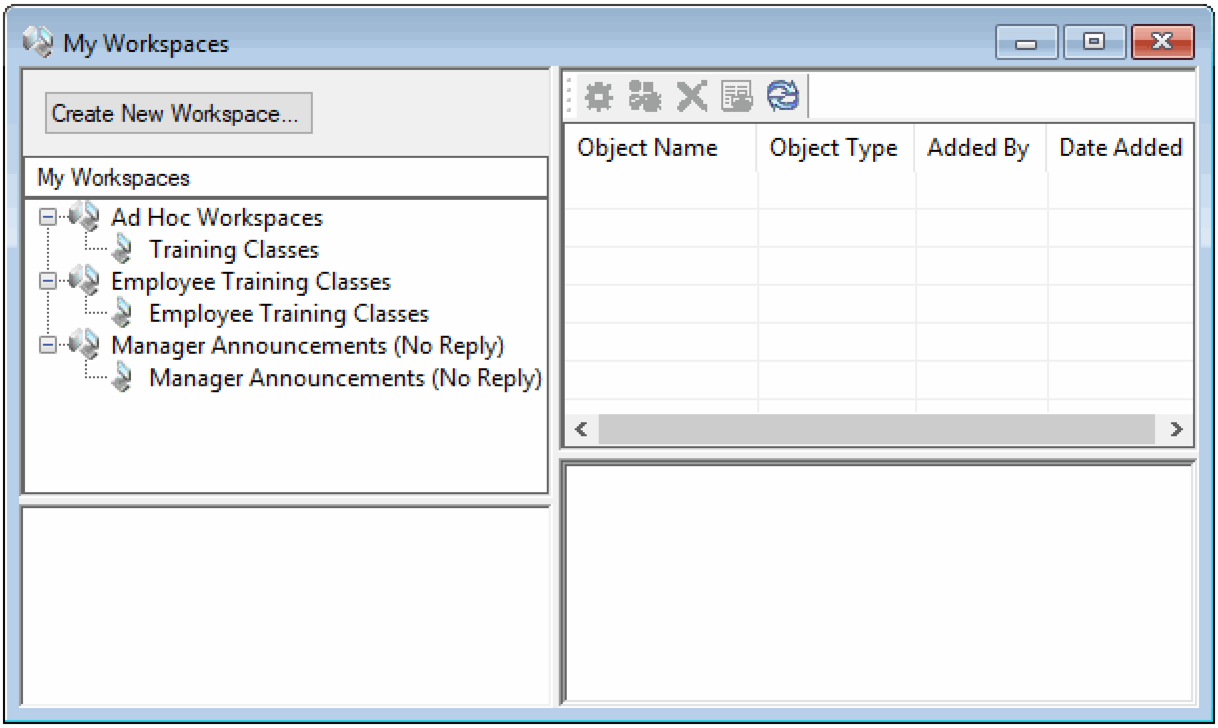
- From the **Create a Workspace** dialog box
- From the **Configure Workspace** dialog box

Note: You must be the creator and/or an administrator of the workspace to access the **Configure Workspace** dialog box.

To access workspace options from the **Create a Workspace** dialog box, see Creating a Workspace with a Template on page 165 or Creating an Ad Hoc Workspace on page 171 for more information on creating a workspace.

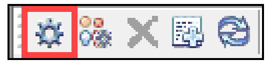
To access workspace options from the **Configure Workspace** dialog box:

1. Select **User | Collaboration | Collaboration Workspaces**. The **My Workspaces** window is displayed.

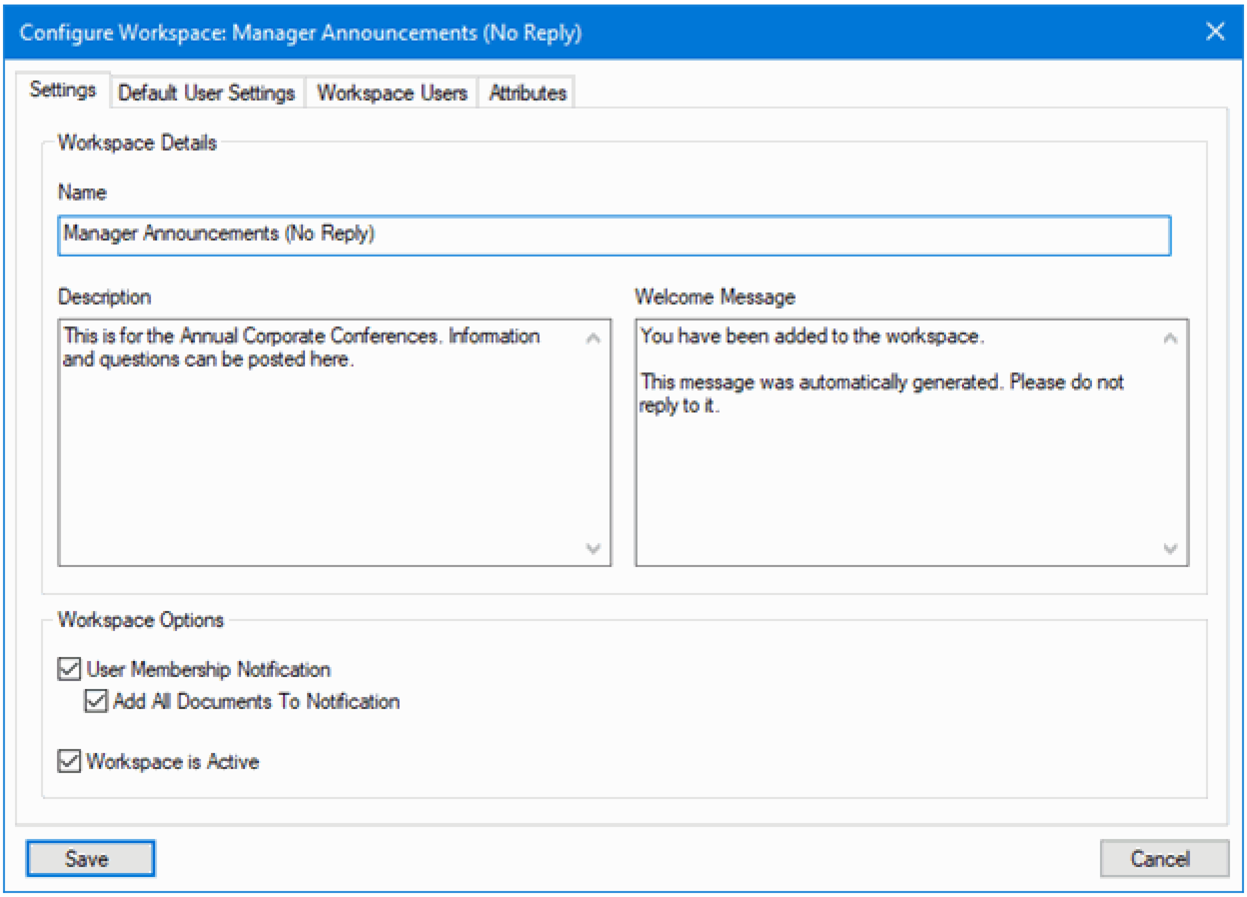


2. Select a workspace from the **My Workspaces** pane.

3. From the object pane toolbar, click the **Workspace Options** button.



The **Configure Workspace** dialog box is displayed.



The following topics contain information about each set of options available:

- The Settings Tab on page 178
- The Default User Settings Tab on page 180
- The Workspace Users Tab on page 184
- The Attributes Tab on page 188

The Settings Tab

The **Settings** tab consists of general workspace details and options that can be configured for members of the workspace.

See the following sections for more details:

- Workspace Details on page 179
- Workspace Options on page 179

Workspace Details

Workspace details are found under the **Settings** tab in the **Configure Workspace** dialog box.

The configured workspace details are displayed to workspace members when they are added to the workspace and when selecting the workspace in the OnBase Client.

The following are available options:

Workspace Detail Option	Description
Name	The name of the workspace. The name entered is displayed in the **My Workspaces** pane. **Note:** The maximum amount of characters allowed is 255.
Description	The description of the workspace. The description is displayed in the Workspace Information pane after selecting a workspace. **Note:** The maximum amount of characters allowed is 255.
Welcome Message	Welcome text that is displayed when an invitation to the workspace is sent to a user. You may include other pertinent information such as required user names and passwords.

Workspace Options

Workspace options are found under the **Settings** tab in the **Configure Workspace** dialog box.

Workspace options can be configured to allow specific notifications to users and determine if the selected workspace is active.

The following are available options:

Workspace Option	Description
User Membership Notification	Sends a notification to all workspace members that they were invited to the new workspace. **Note:** This option must be selected each time you add members to the workspace and would like them to be notified.
Add All Documents to Notification	Adds all documents in the workspace to member notifications. **Note:** This option is only available when the **User Membership Notification** option is selected.

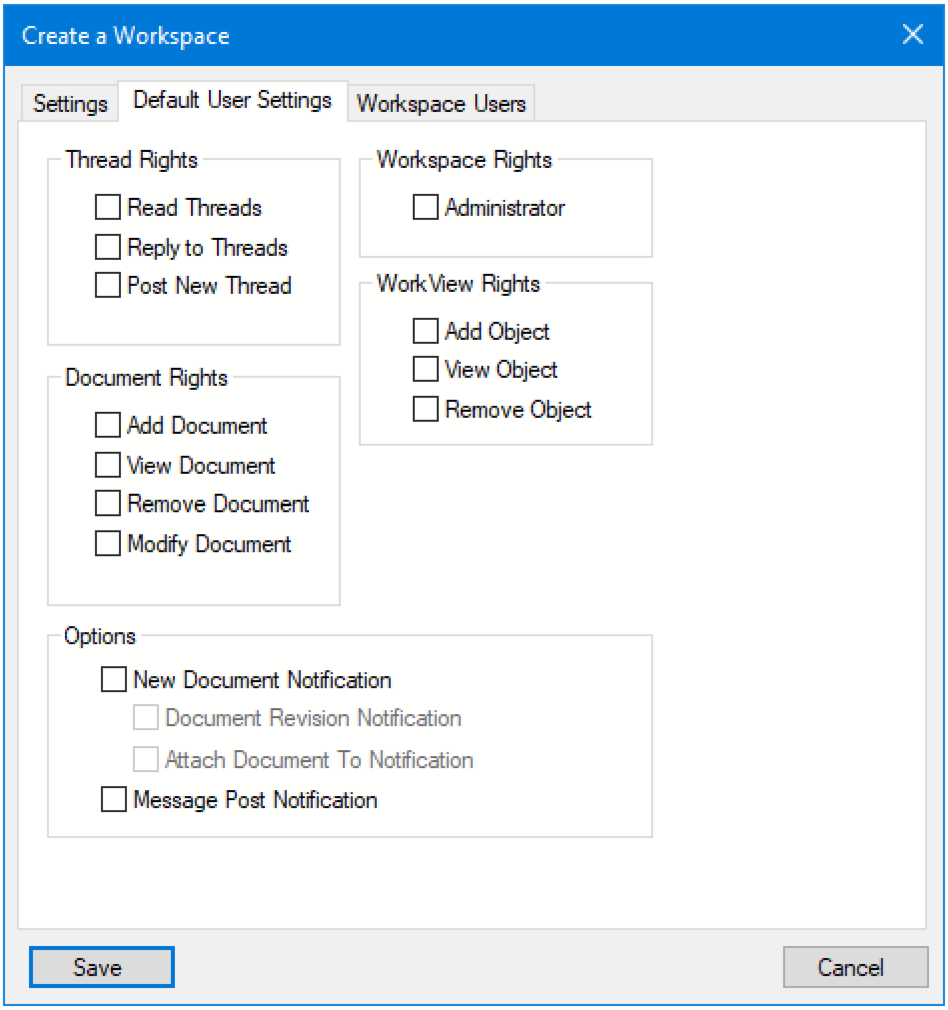
Workspace Option	Description
Workspace is Active	Controls whether the workspace is displayed in the **My Workspaces** pane. Select this option to display the workspace in the **My Workspaces** pane or deselect this option to mark the workspace as inactive. **Note:** Once a workspace is marked inactive, all workspace options become read-only until the workspace is marked active again. For more information on active and inactive workspaces, see

The Default User Settings Tab

You can configure workspace member rights under the **Default User Settings** tab in the **Configure Workspace** dialog box. Selected rights are configured as the default rights for every member added to the workspace.

Note: To configure workspace rights for an individual workspace member, you must use the **Collaboration User Options** dialog box.

The **Default User Settings** tab contains various sections of member rights options and notification options to configure.



See the following sections for more information:

- Thread Rights on page 182
- Document Rights on page 182
- Workspace Rights on page 183
- WorkView Rights on page 183
- Notification Options on page 183

Thread Rights

The **Thread Rights** section contains rights to discussion threads for workspace members. The following rights are available:

Thread Right	Description
Read Threads	Gives workspace members the right to read discussion threads in the workspace.
Reply to Threads	Gives workspace members the right to reply to discussion threads in the workspace.
Post New Thread	Gives workspace members the right to create a new discussion thread in the workspace.

Document Rights

The **Document Rights** section contains rights to documents for workspace members. The following rights are available:

Document Right	Description
Add Document	Gives workspace members the right to add documents to the workspace.
View Document	Gives workspace members the right to view documents in the workspace. The following are considerations when granting the **View Document** right: • If a workspace member is granted the **View Document** right, the member can view documents associated with the workspace regardless of whether they have rights to the Document Type. • If a Discussion Thread was created at a document level, workspace members cannot view the documents associated with the document-level Discussion Thread if the workspace members do not have rights to view the Document Type.
Remove Document	Gives workspace members the right to remove documents from the workspace. Removing a document from a workspace does not remove the document from any other workspaces or from OnBase.
Modify Document	Gives workspace members the right to modify documents in the workspace. **Note:** If a user has the right to modify a document outside of the workspace, that user can modify the same document within the workspace even if the **Modify Document** option is not selected.

Workspace Rights

The **Workspace Rights** section contains the **Administrator** option. Select the **Administrator** options to give users administrator rights to the workspace.

Administrator rights give users rights to all document, WorkView, and discussion thread rights. Once this option is selected, all other rights are automatically distributed to users.

WorkView Rights

The **WorkView** section contains rights to WorkView objects for workspace members.

Note: You must be licensed for WorkView to use WorkView objects in Collaboration. See the **WorkView** documentation for details on WorkView objects.

The following rights are available:

WorkView Right	Description
Add Object	Gives workspace members the right to add WorkView objects to the workspace.
View Object	Gives workspace members the right to view WorkView objects in the workspace.
Remove Object	Gives workspace members the right to remove WorkView objects from the workspace.

Notification Options

The **Options** section contains notification options for members of the workspace.

Note: Users can override default notification settings of a workspace by configuring their user options.

The following options are available:

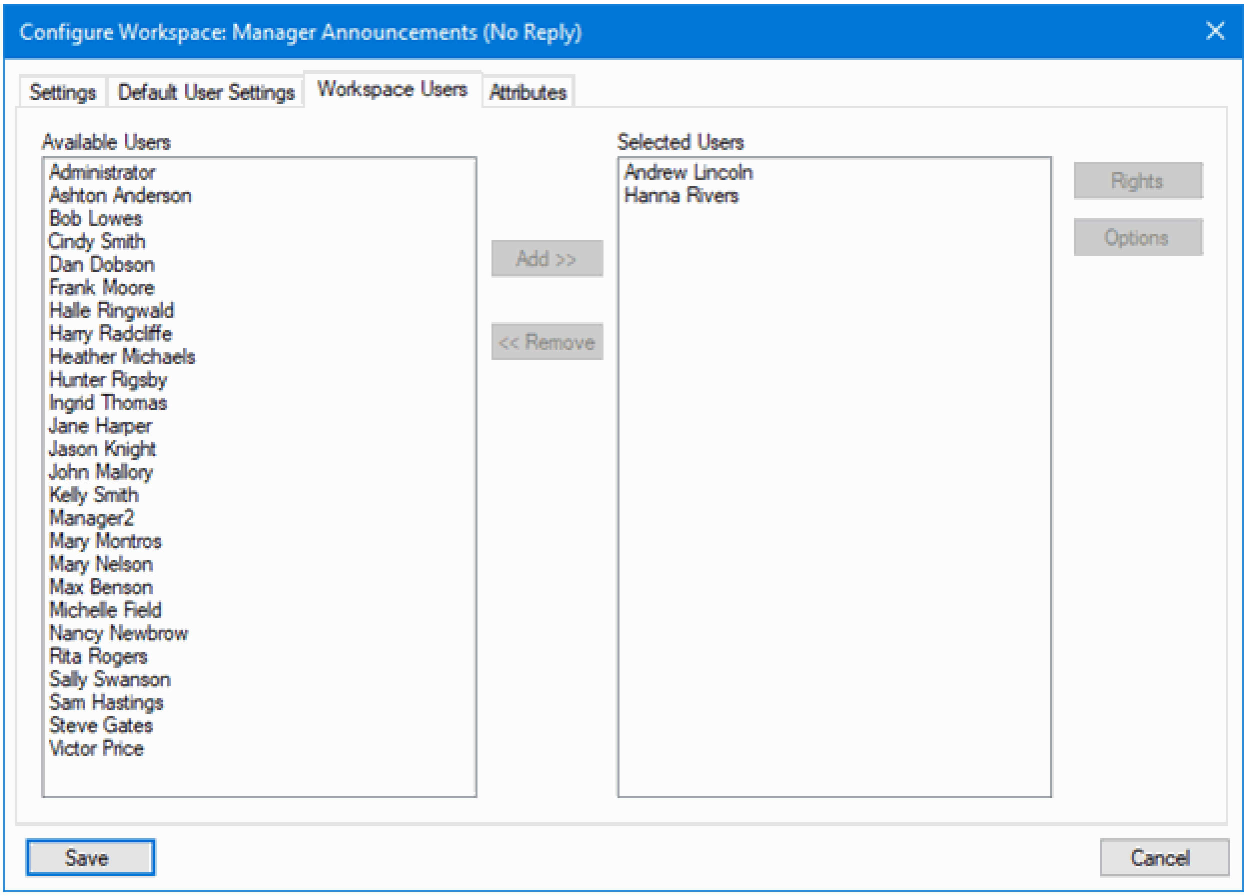
Notification Option	Description
New Document Notification	Sends a notification to workspace members when a new document is added to the workspace.

Notification Option	Description
Document Revision Notification	**Note:** This option is only available when the **New Document Notification** option is selected. Sends a notification to workspace members when a new revision of an existing workspace document is added. **Caution:** Notifications are only sent if the document was revised from the OnBase Client. If the revision occurs in the Unity Client or the Web Client, no notifications are sent.
Attach Document To Notification	**Note:** This option is only available when the **New Document Notification** is selected. Attaches the new document added to the workspace in the notification to workspace members. **Note:** Even if users are not permitted to view documents, if a notification is configured to contain documents, the user can open the document from the email notification.
Message Post Notification	Sends a notification to workspace members when a new Discussion Thread is added to the workspace.

The Workspace Users Tab

You can configure workspace member rights for an individual member rather than each member inheriting the default rights configured when the workspace was created.

This can be configured in the **Configure Workspace** dialog box from the **Workspace Users** tab.



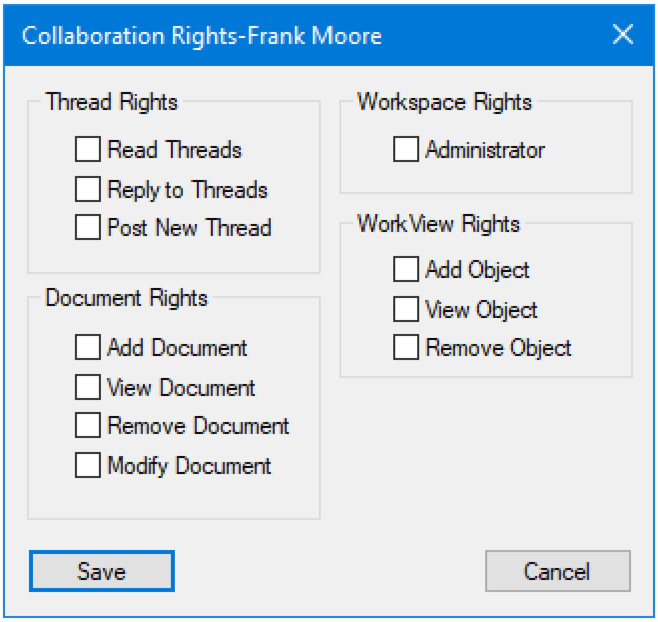
To configure workspace rights and options for an individual member:

1. From the **Available Users** list, select a user name.

Note: Available users are users already created in the Configuration module. If you need to assign a user that is not available, they must first be created in the Configuration module. See your system administrator for more information.

2. Click the **Add** button to move the user name to the **Selected Users** list.
3. Select the user from the **Selected Users** list.

4. Click the **Rights** button. The **Collaboration Rights** dialog box is displayed.



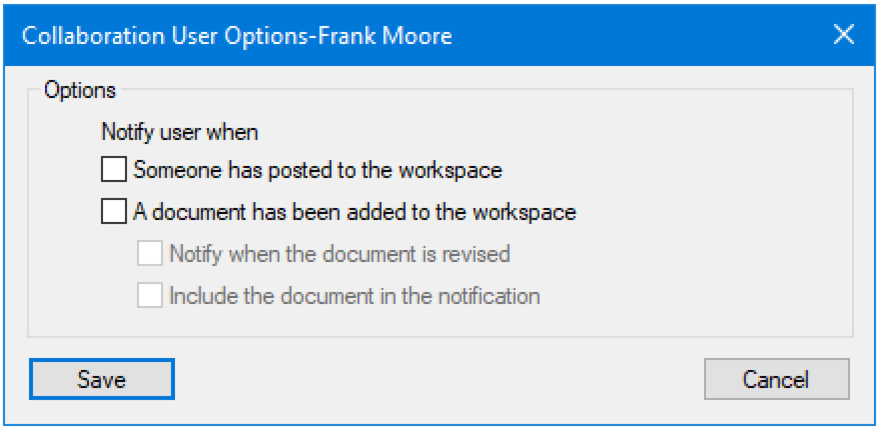
Note: If the workspace was configured to inherit the default settings of the template, some options may already be selected.

5. Select member rights for the selected member. These options are the same options displayed on the **Default User Settings** tab when configuring default member rights for every member of the workspace.

   See the following topics for more information on these options:

   - Thread Rights on page 182
   - Document Rights on page 182
   - Workspace Rights on page 183
   - WorkView Rights on page 183
6. Click **Save**.
7. Select the same user from the **Selected Users** list.

8. Click the **Options** button. The **Collaboration User Options** dialog box is displayed.



9. Select notification options for the selected member. The following options are available:

Notification Option	Description
Someone has posted to the workspace	Sends a notification to workspace members when a new Discussion Thread is added to the workspace.
A document has been added to the workspace	Sends a notification to workspace members when a new document is added to the workspace.
Notify when the document is revised	**Note:** This option is only available when the **New Document Notification** option is selected. Sends a notification to workspace members when a new revision of an existing workspace document is added. **Caution:** Notifications are only sent if the document was revised from the OnBase Client. If the revision occurs in the Unity Client or the Web Client, no notifications are sent.
Include the document in the notification	**Note:** This option is only available when the **New Document Notification** is selected. Attaches the new document added to the workspace in the notification to workspace members. **Note:** Even if users are not permitted to view documents, if a notification is configured to contain documents, the user can open the document from the email notification.

10. Click **Save**.

The Attributes Tab

You can configure attribute values from the **Attributes** tab in the **Configure Workspace** dialog box. The **Attributes** tab is only displayed if attributes are configured for a workspace template.

Attribute values can be searched when searching and retrieving workspaces. For more information on workspace retrieval, see Using Workspace Retrieval to Find a Workspace on page 161.

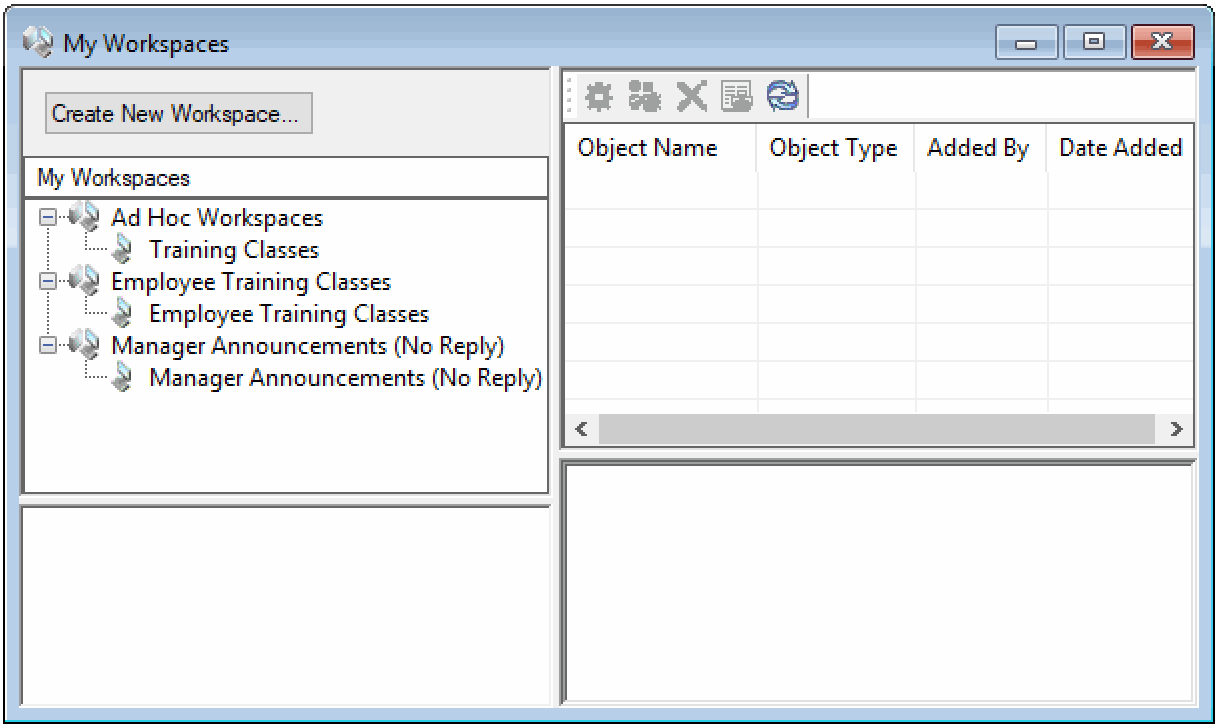
For each attribute, enter a useful attribute value to aid users when searching and retrieving workspaces.

Configuring User Options

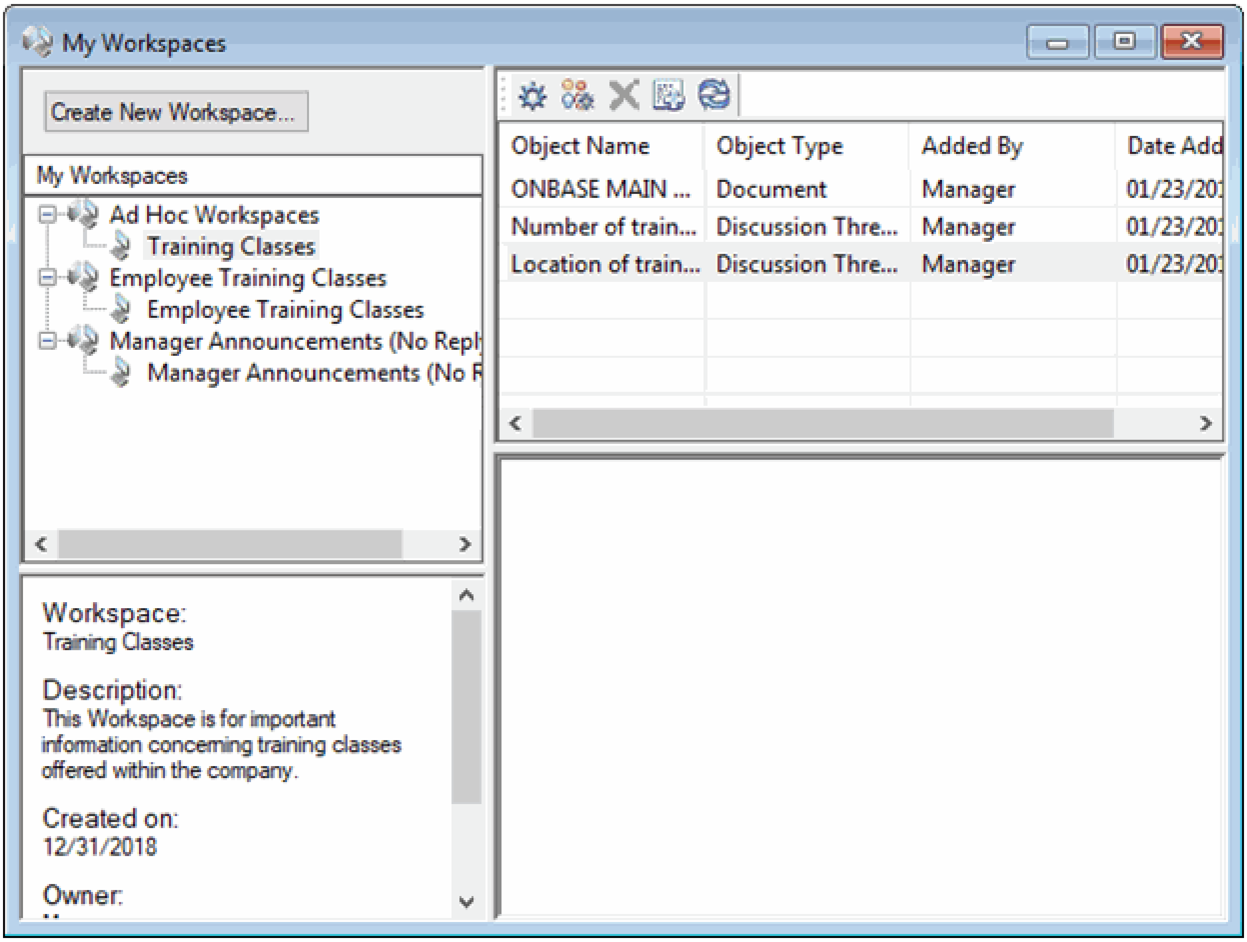
You can reconfigure your user option notification settings in a workspace after they are configured when creating a discussion thread.

To configure user options:

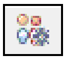
1. Select **User | Collaboration | Collaboration Workspaces**. The **My Workspaces** window is displayed.



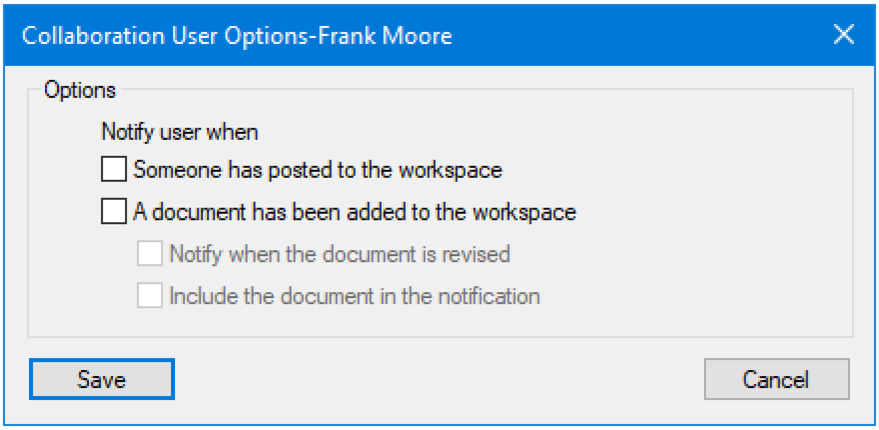
2. Select a workspace from the **My Workspaces** pane. The workspace information and objects are displayed.



3. From the workspace toolbar, click **User Options**.



The **Collaboration User Options** dialog box is displayed.



4. Select or deselect the notification options you want to receive. The following options are available:

Notification Option	Description
Someone has posted to the workspace	Sends a notification to workspace members when a new Discussion Thread is added to the workspace.
A document has been added to the workspace	Sends a notification to workspace members when a new document is added to the workspace.
Notify when the document is revised	**Note:** This option is only available when the **New Document Notification** option is selected. Sends a notification to workspace members when a new revision of an existing workspace document is added. **Caution:** Notifications are only sent if the document was revised from the OnBase Client. If the revision occurs in the Unity Client or the Web Client, no notifications are sent.
Include the document in the notification	**Note:** This option is only available when the **New Document Notification** is selected. Attaches the new document added to the workspace in the notification to workspace members. **Note:** Even if users are not permitted to view documents, if a notification is configured to contain documents, the user can open the document from the email notification.

5. Click **Save**.

Workspace Administrators

If you create a Workspace, you are automatically the administrator of the Workspace. This means that you have all administrator rights by default.

Only administrators can access and configure Workspace Options, including assigning user rights for the Workspace.

Note: Administrator rights grant all document, WorkView and Discussion Thread rights.

In addition, you can assign other users administrative rights to the workspace.

To assign administrative rights to additional users, see Configuring Workspace Options on page 177. To configure administrative rights on a workspace template level, see Configuring Templates on page 23.

The default user settings are not retroactive. If you want to change the user rights for a user that has already been assigned to a Workspace you have to change the rights for the selected user in the Workspace Users tab and not the default user settings.

Document Rights	Description
Add Document	Gives users the rights to add documents to the Workspace. Users may add a document to a Workspace by right-clicking on an open document or from the Document Search Results list.
View Document	Gives users the rights to view documents in the Workspace. **Note:** If a user is granted the **View Document** right for a Discussion Thread associated with a Workspace, he/she is able to view documents associated with the Workspace regardless of whether or not they have rights to the Document Type. **Note:** If the Discussion Thread was created at the document level, the user will not be able to view documents associated with the Discussion Thread if he/she does not have rights to the documents' Document Types.
Remove Document	Gives users the rights to remove documents from the Workspace. This does not remove documents from OnBase or all Workspaces, only from this Workspace.
Modify Document	Gives users the rights to modify documents in the Workspace. **Note:** If a user has the rights to modify a document outside of the Workspace, that user will be able to modify that document within the Workspace even if the **Modify Document** option is not selected.

WorkView Rights	Description
Add WorkView Objects	Gives users the rights to add WorkView Objects to the Workspace.
View WorkView Objects	Gives users the rights to view WorkView Objects in the Workspace.
Remove WorkView Objects	Gives users the rights to remove WorkView Objects from the Workspace.

Note: You must be licensed for WorkView to use WorkView objects in Collaboration. See the WorkView Help for details on WorkView Objects.

Thread Rights	Description
Read Discussion Threads	Select to give users rights to read Discussion Threads in the Workspace.
Reply to Discussion Threads	Select to give users rights to reply to Discussion Threads in the Workspace.
Post a New Discussion Threads	Select to give users rights to create new Discussion Threads in the Workspace.

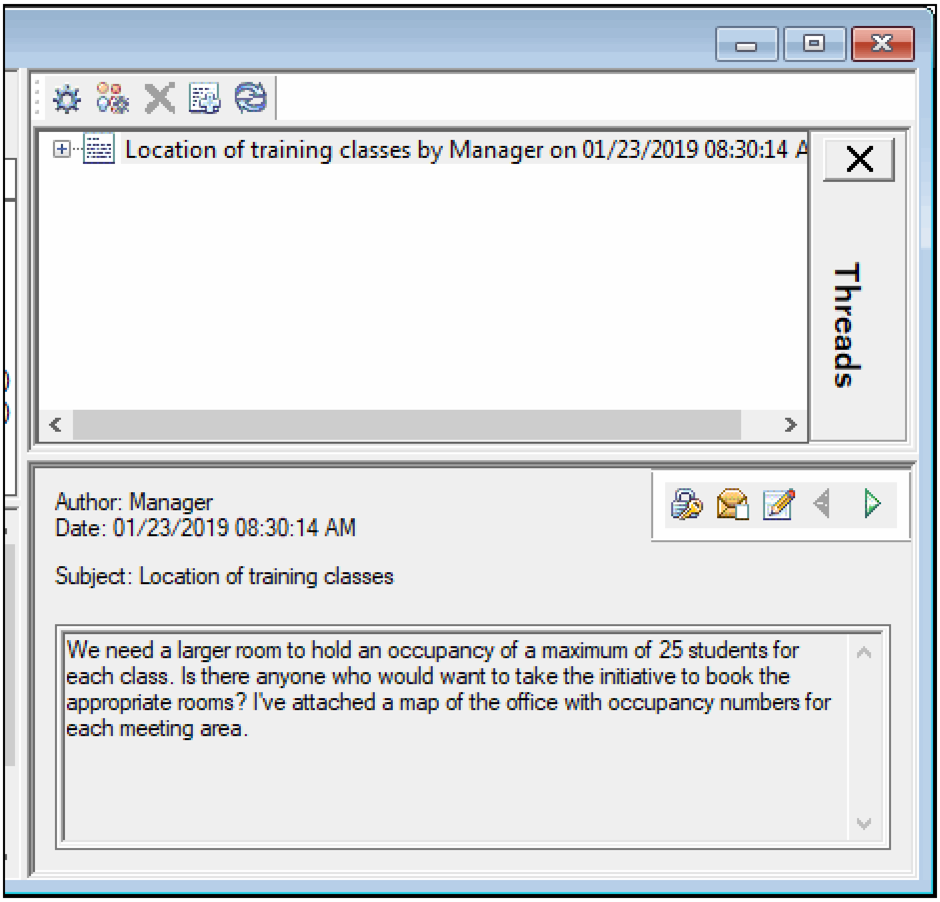
Discussion Thread Overview

Discussion threads can be viewed in a workspace within the OnBase Client. Discussion threads can contain various replies and attachments from other users who are members of the workspace and have rights to view and add to the discussion thread.

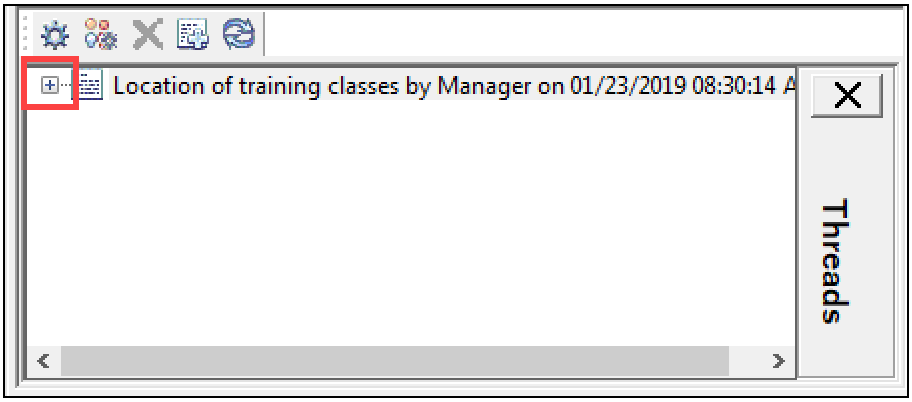
For more information on interacting with discussion threads, see the following sections:

- Adding a New Discussion Thread on page 194
- Replying to a Post in a Discussion Thread on page 203
- Applying Security Settings to a Discussion Thread on page 209
- Subscribing to Notifications for a Discussion Thread on page 213

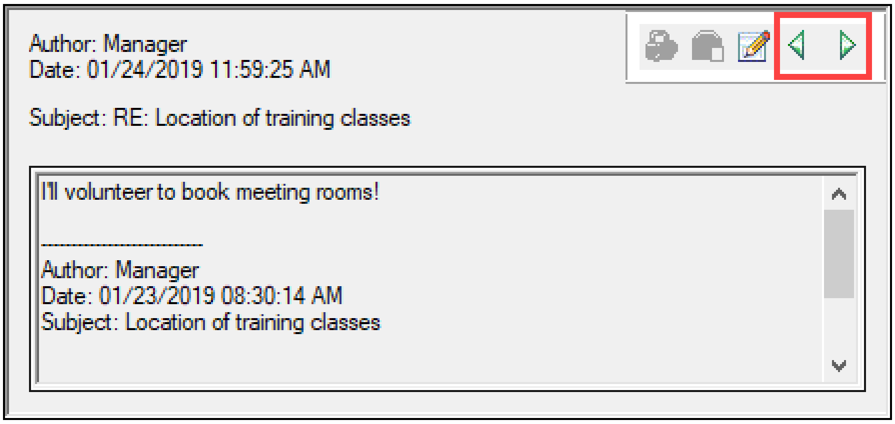
Discussion threads are viewed in the **My Workspaces** window from within the object viewer.



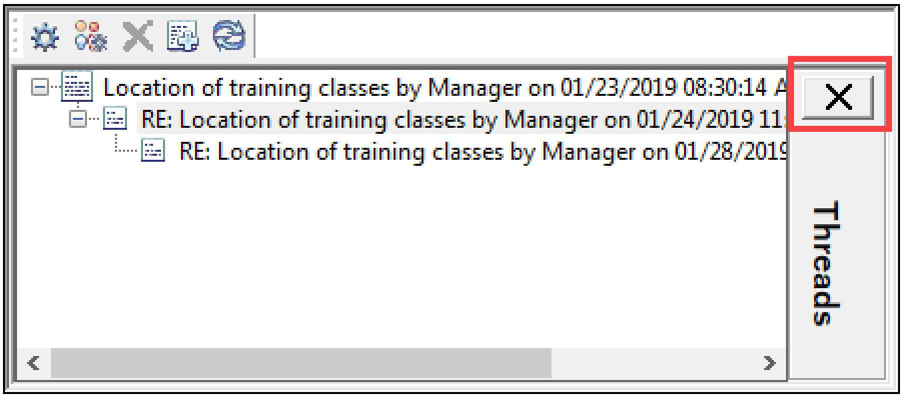
Expand the discussion thread by clicking the plus sign next to the listed thread. This can help you navigate to the reply you want to see.



Or, in the object viewer, click the left and right arrow buttons to navigate through each reply in the discussion thread.



To exit a discussion thread, click the X in the top right corner of the open discussion thread.

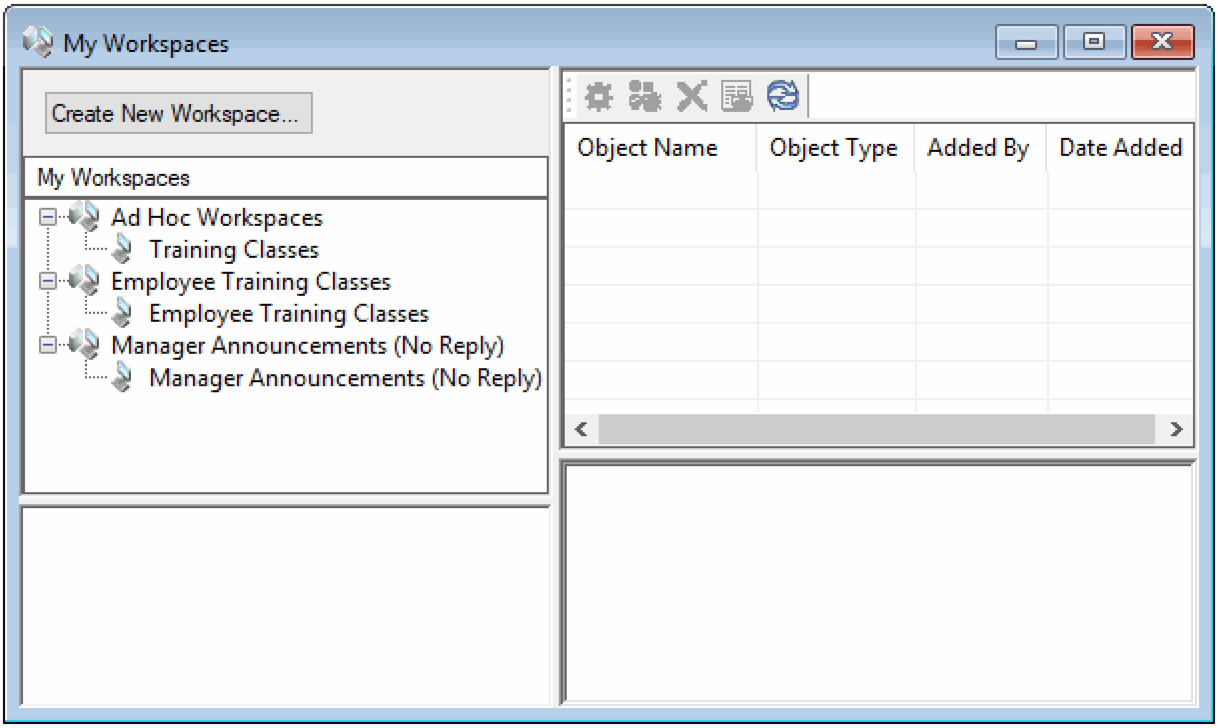


Adding a New Discussion Thread

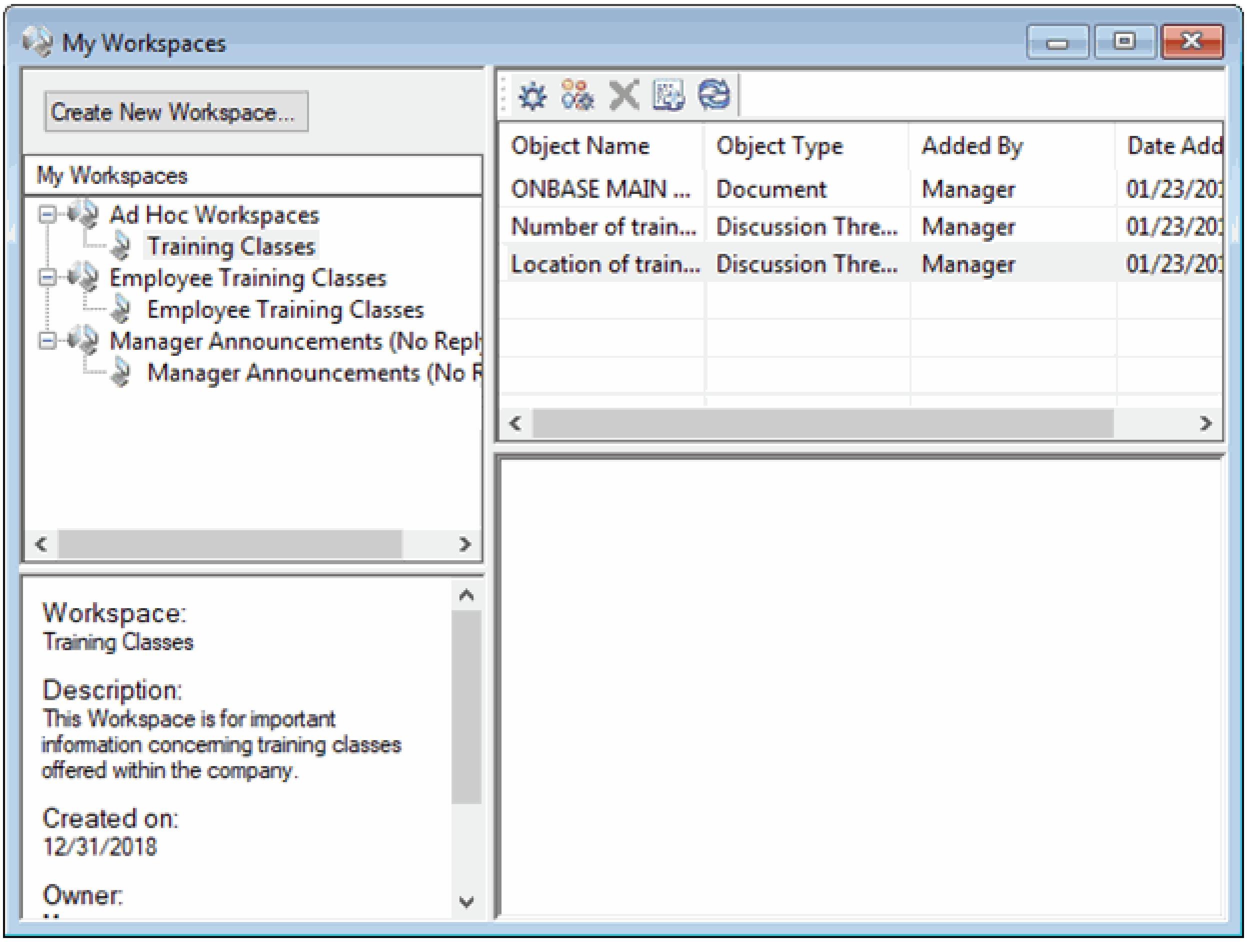
You can add a new discussion thread to a workspace. You can only add a new discussion thread if your workspace administrator gave you the **Post New Thread** right to the workspace.

To add a new discussion thread:

1. Select **User | Collaboration | Collaboration Workspaces**. The **My Workspaces** window is displayed.

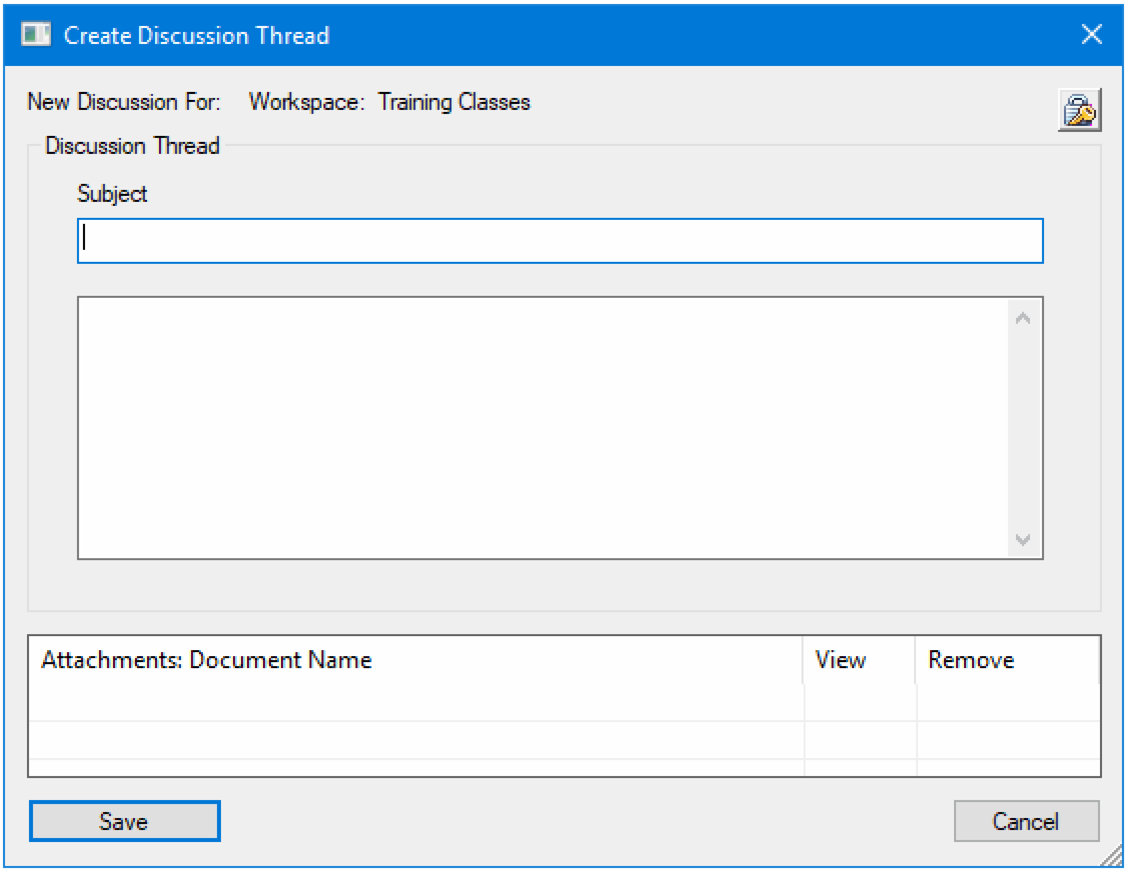


2. Select a workspace from the **My Workspaces** pane. The workspace information and objects are displayed.



3. From the workspace toolbar, click **Create New Discussion**.

The **Create Discussion Thread** dialog box is displayed.



4. Enter a subject for the discussion thread in the **Subject** field.
5. Enter the text to start the discussion thread in the empty field below the **Subject** field.

Note: The maximum character limit for this field is 4096.

6. Attach any documents to the discussion thread, if necessary. See Applying Security Settings to a Discussion Thread on page 209 for more information on attaching documents.

7. Add security to the discussion thread, if necessary, by clicking the Apply Security button.

   For more information on applying security settings, see Applying Security Settings to a Discussion Thread on page 209.

Note: Depending on your system configuration, the **Apply Security** button may not be available. See your system administration for questions regarding discussion thread level security.

8. Click **Save**.

Attaching Documents to a Discussion Thread

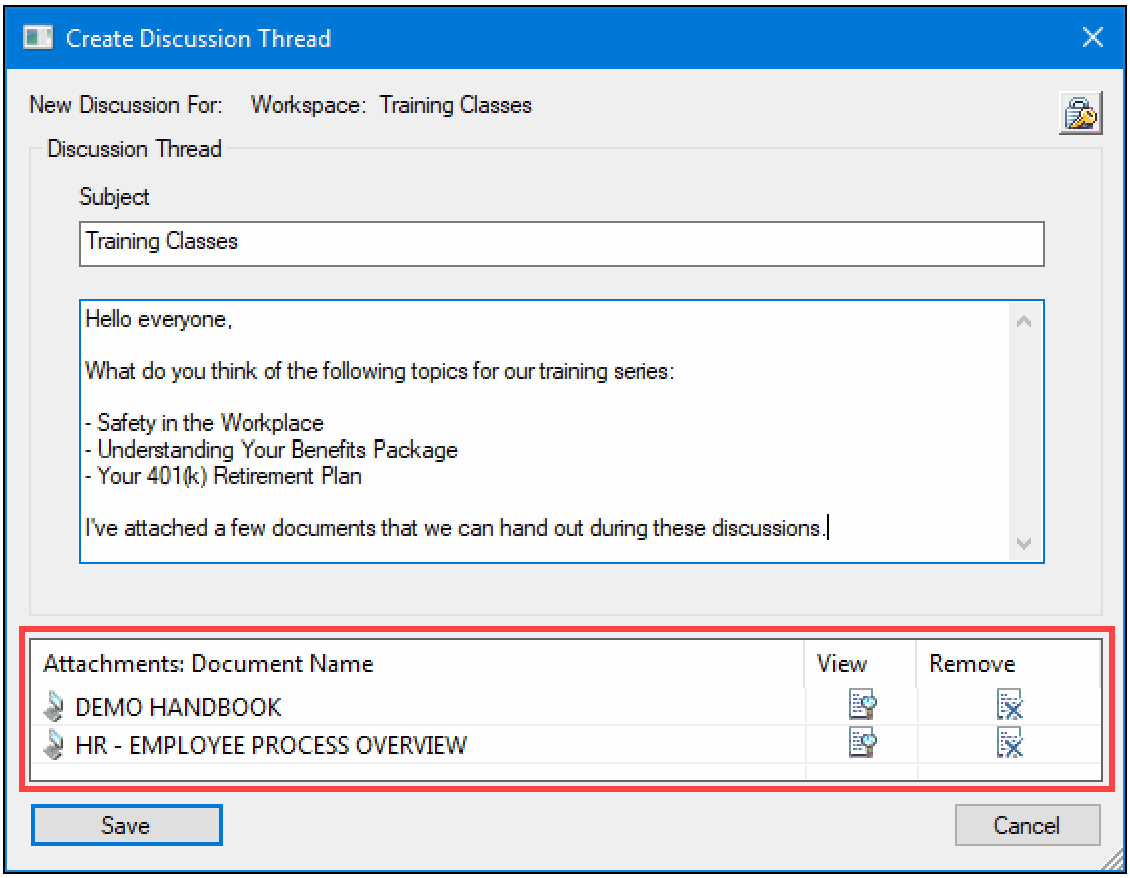
When creating a new discussion thread or a post, you can attach any necessary documents that exist in OnBase.

To attach a document to a discussion thread:

1. Add a new discussion thread. See Adding a New Discussion Thread on page 194 for instructions on adding a discussion thread.
2. With the **Create Discussion Thread** dialog box open, retrieve a document from the **Document Retrieval** window.

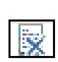
3. From the **Document Search Results** list, attach a document to your post in one of two ways:
   - Select a document, right-click, and select **Collaboration | Attach to Current Post**.
   - Right-click and drag a selected document into the **Attachments** section of the **Create Discussion Thread** dialog box.

   The documents are added to the **Attachments** section of the **Create Discussion Thread** dialog box.



4. To view the added document, select the **View** button.

   The document is displayed in the OnBase document viewer.
5. To remove the added document, select the **Remove** button.



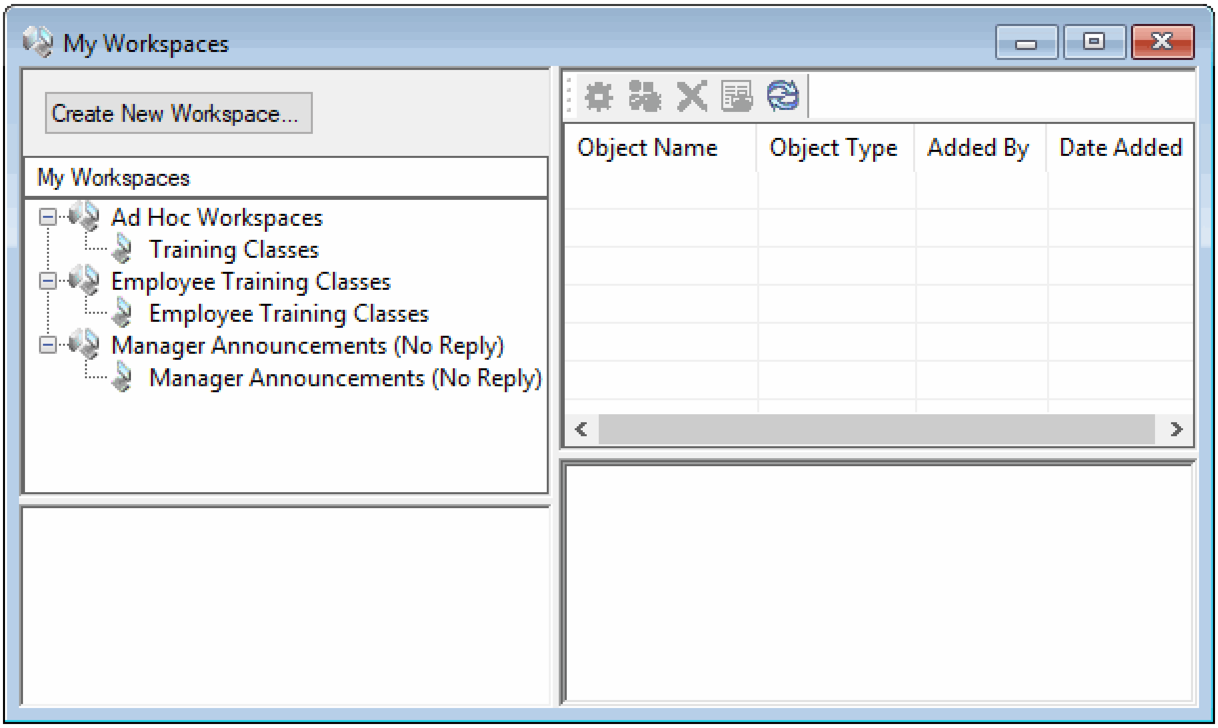
   The document is removed from the **Attachments** section.
6. When all necessary documents are added, click **Save**.

Viewing Attached Documents in a Post

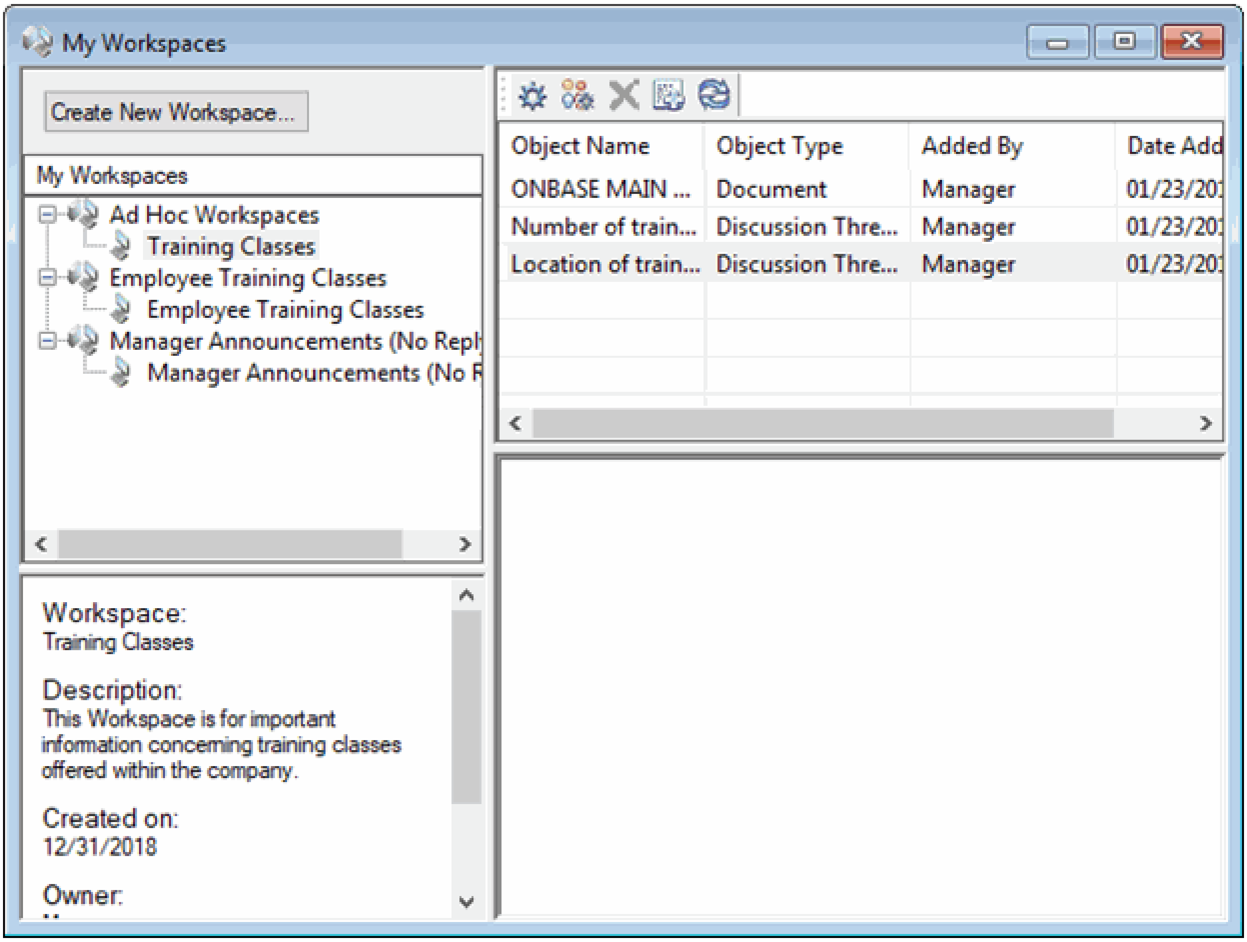
Once a document has been attached, you can view it from the post.

To view attached documents in a post:

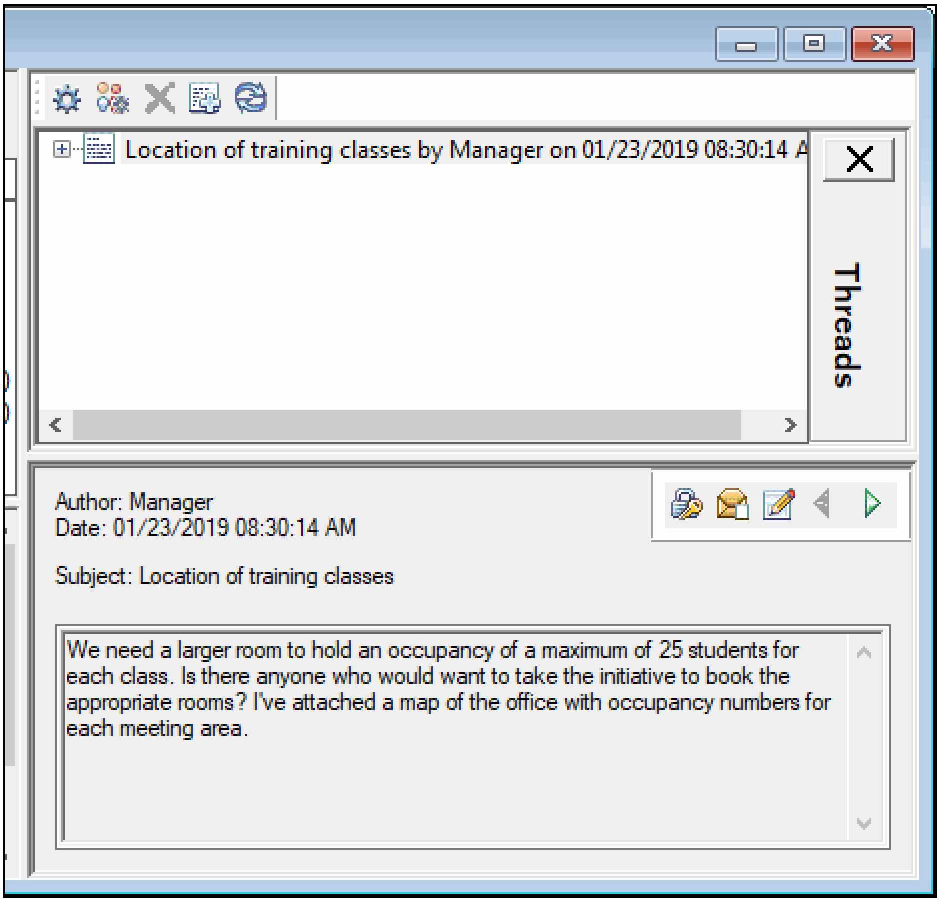
1. Select **User | Collaboration | Collaboration Workspaces**. The **My Workspaces** window is displayed.



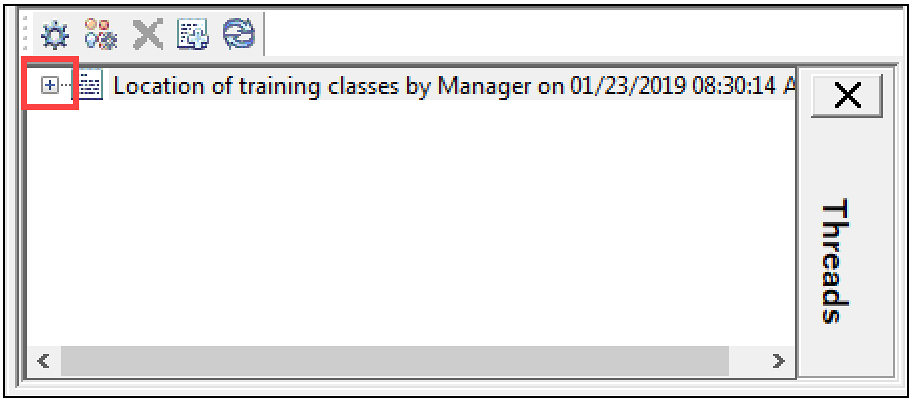
2. Select a workspace from the **My Workspaces** pane. The workspace information and objects are displayed.



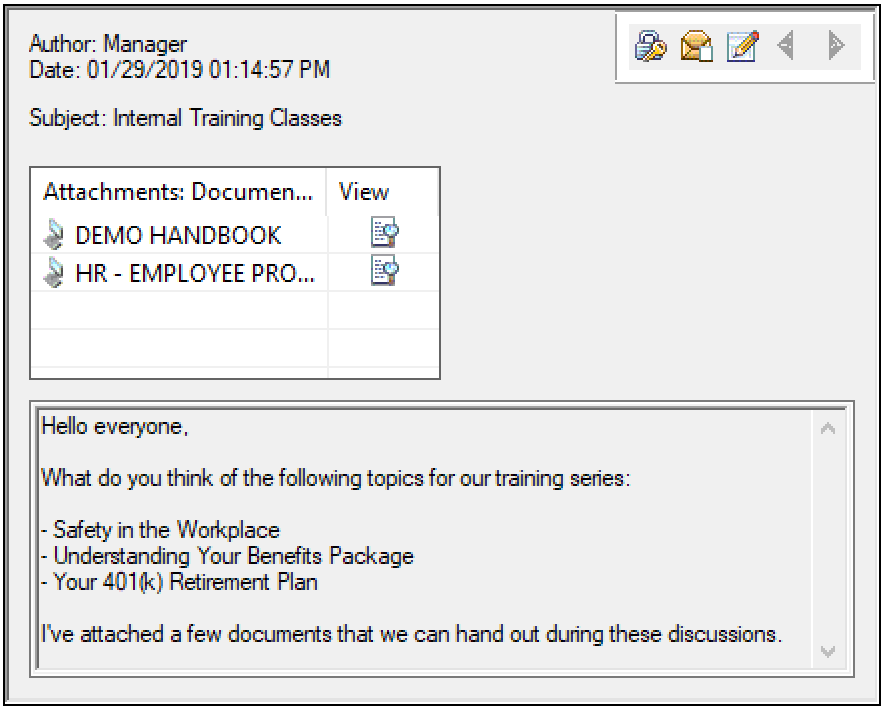
3. Double-click on a discussion thread in the object pane. The discussion thread is displayed in the object viewer.



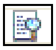
4. If multiple posts exist in the discussion thread, click the plus button to the left of the discussion thread to expand the list of available posts.



5. Select a post from the discussion thread with documents attached. The message and the attachments are displayed in the object viewer.



6. From the **Attachments** section, click the **View** button next to the document you want to view.



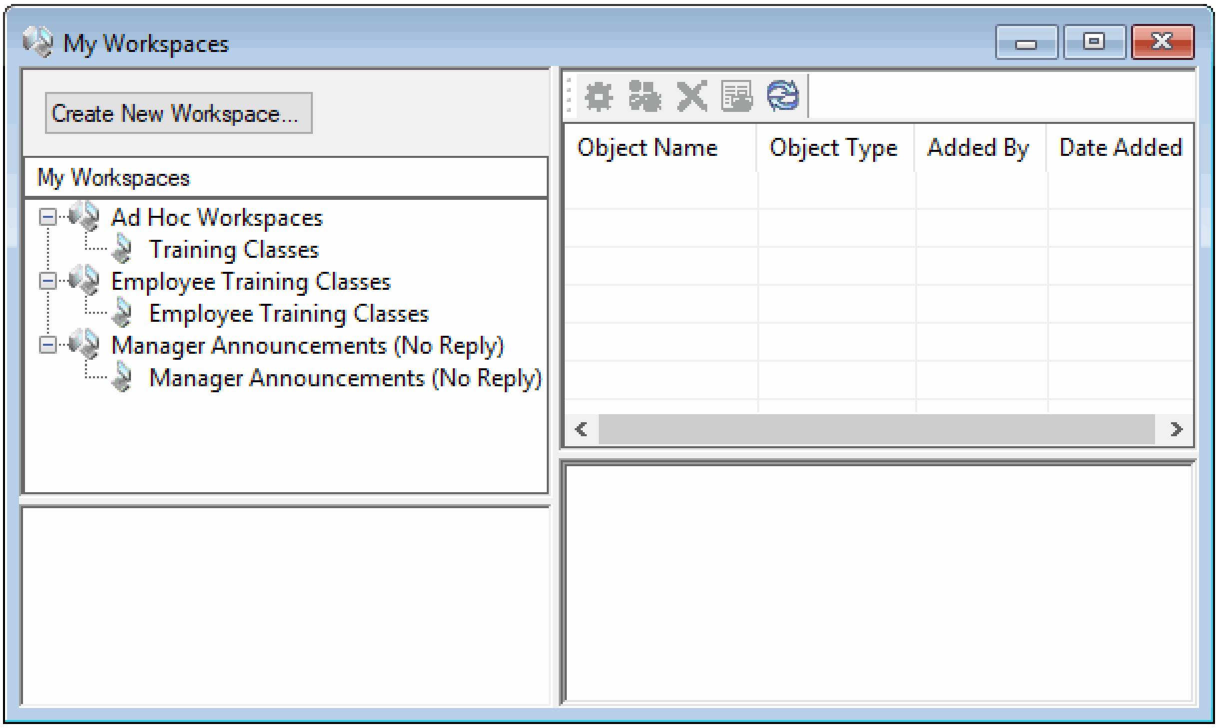
The document is displayed in the OnBase document viewer.

Replying to a Post in a Discussion Thread

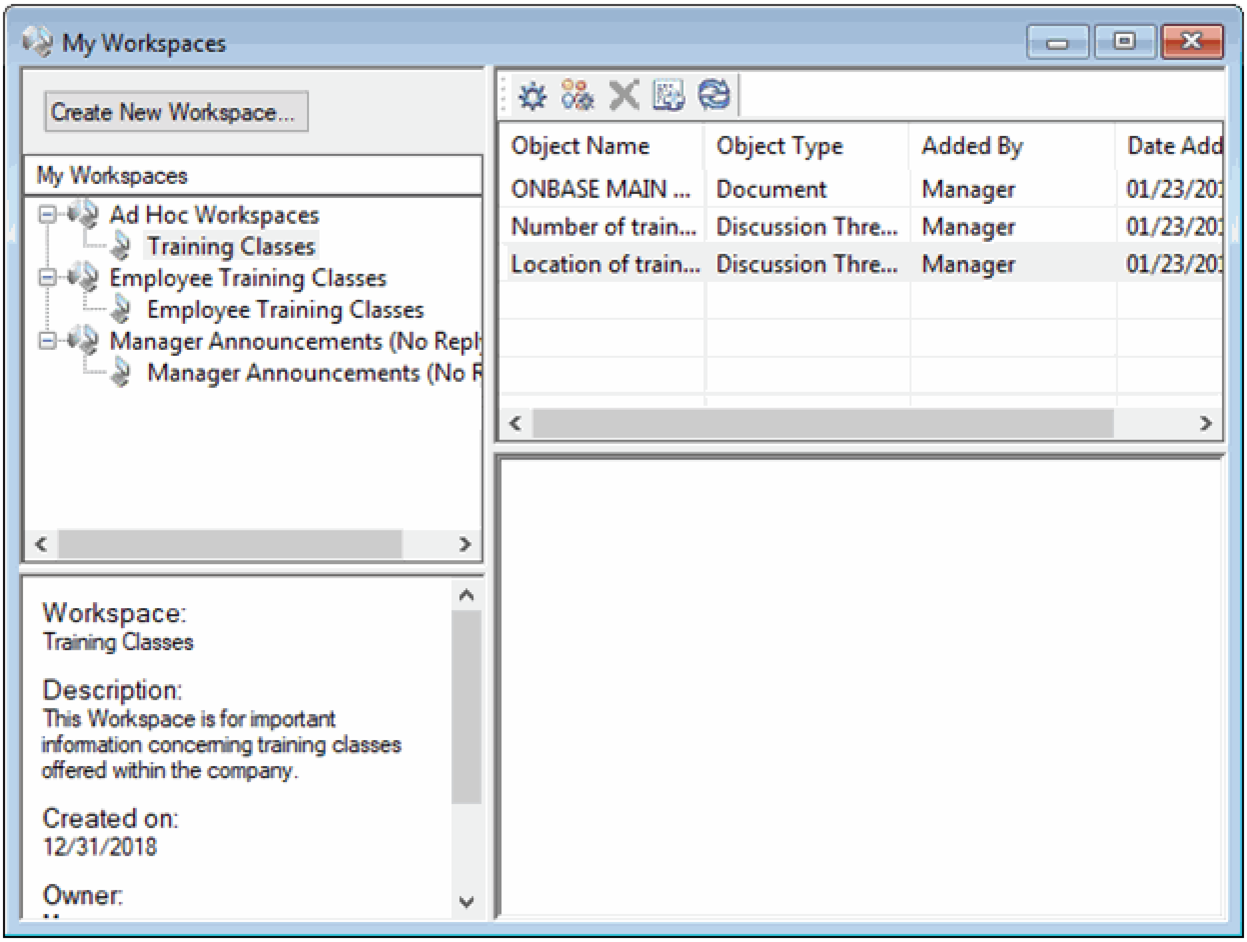
You can reply to a post in a workspace discussion thread. You can only reply to a post in a discussion thread if the workspace administrator gave you the **Reply to Discussion Threads** right.

To reply to a post in a discussion thread:

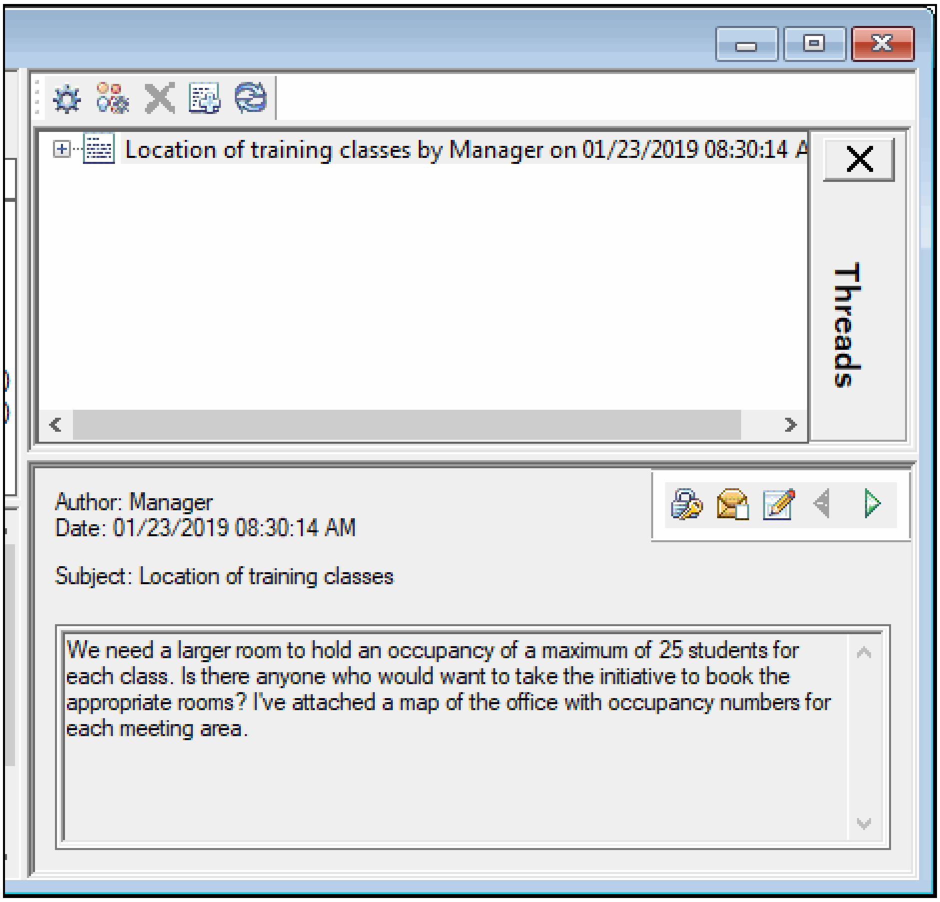
1. Select **User | Collaboration | Collaboration Workspaces**. The **My Workspaces** window is displayed.



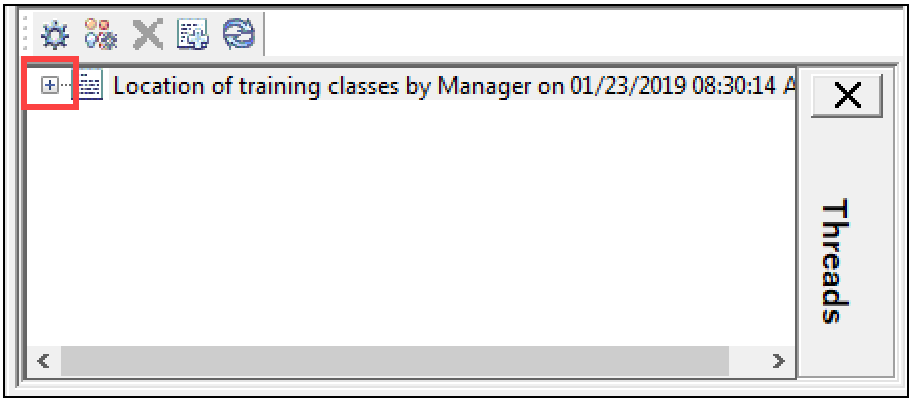
2. Select a workspace from the **My Workspaces** pane. The workspace information and objects are displayed.



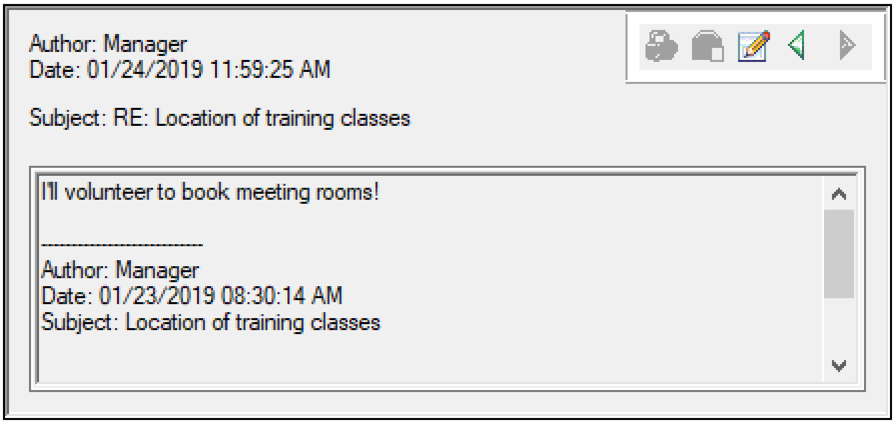
3. Double-click on a discussion thread in the object pane. The discussion thread is displayed in the object viewer.



4. If multiple posts exist in the discussion thread, click the plus button to the left of the discussion thread to expand the list of available posts.

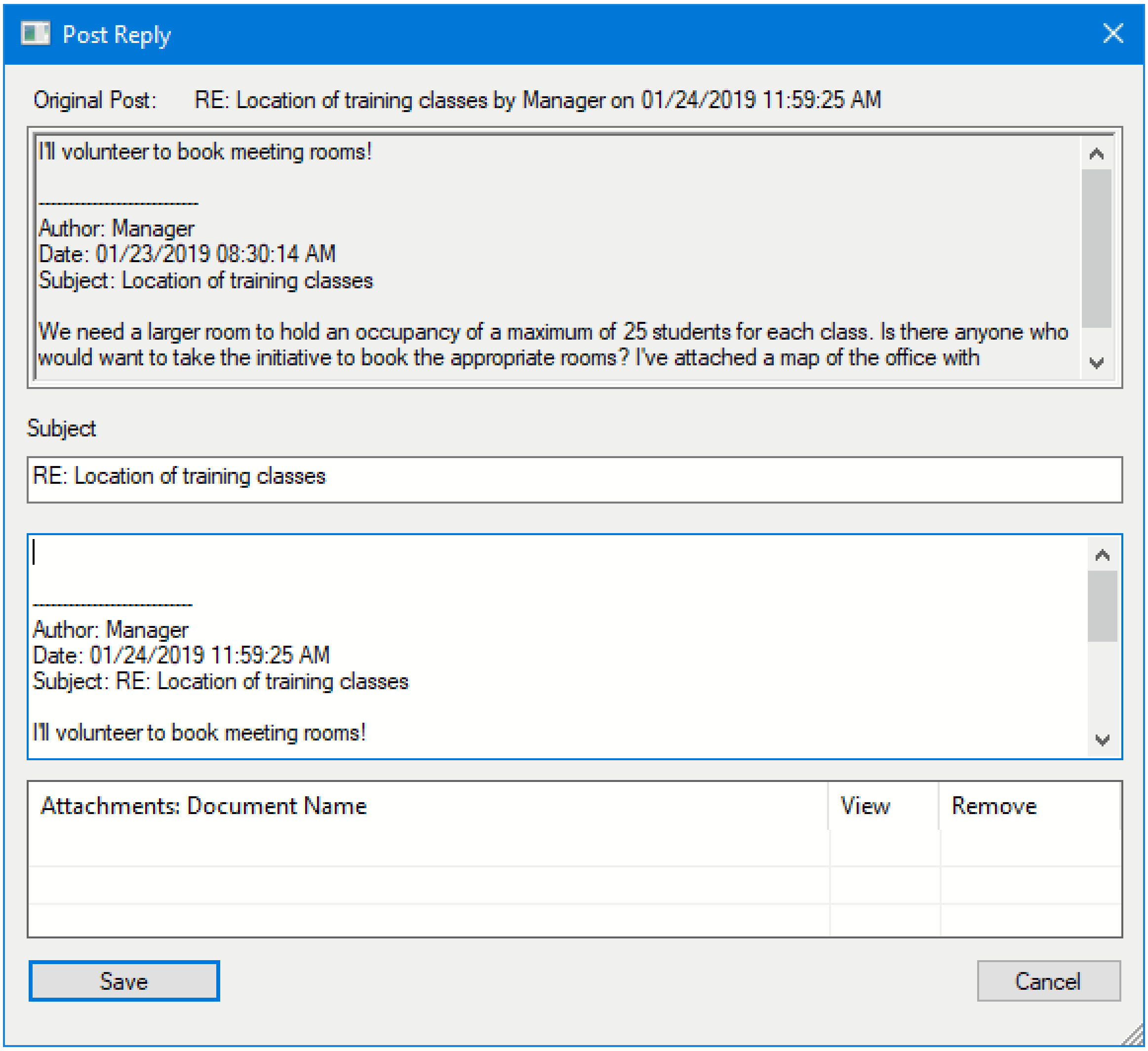


5. Select a post to reply to. The post is displayed in the object viewer.



6. From the object viewer toolbar, click **Reply**.

The **Post Reply** dialog box is displayed.



7. Edit the subject in the **Subject** field as necessary.
8. Enter the text of your reply in the field below the **Subject** field.

Note: You are allowed a maximum of 4096 characters in a reply.

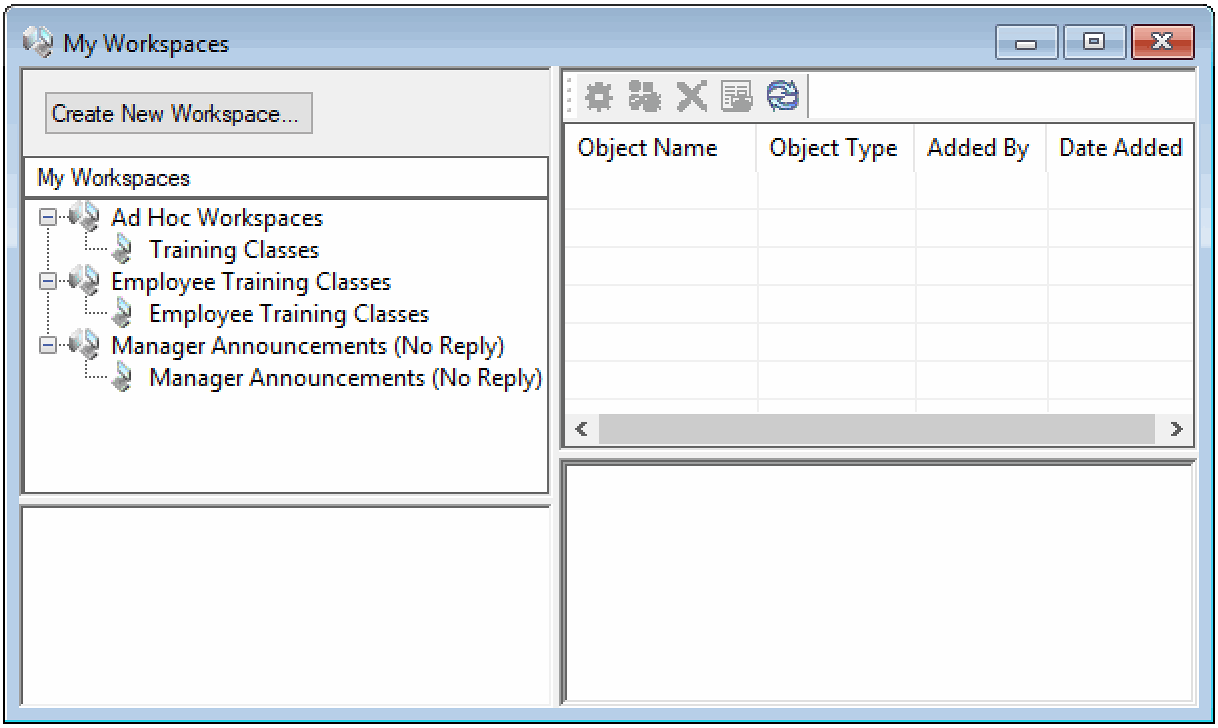
9. Attach any documents to the discussion thread, if necessary. See Attaching Documents to a Discussion Thread on page 198 for more information on attaching documents.
10. Click **Save**. Your reply is posted in the discussion thread.

Applying Security Settings to a Discussion Thread

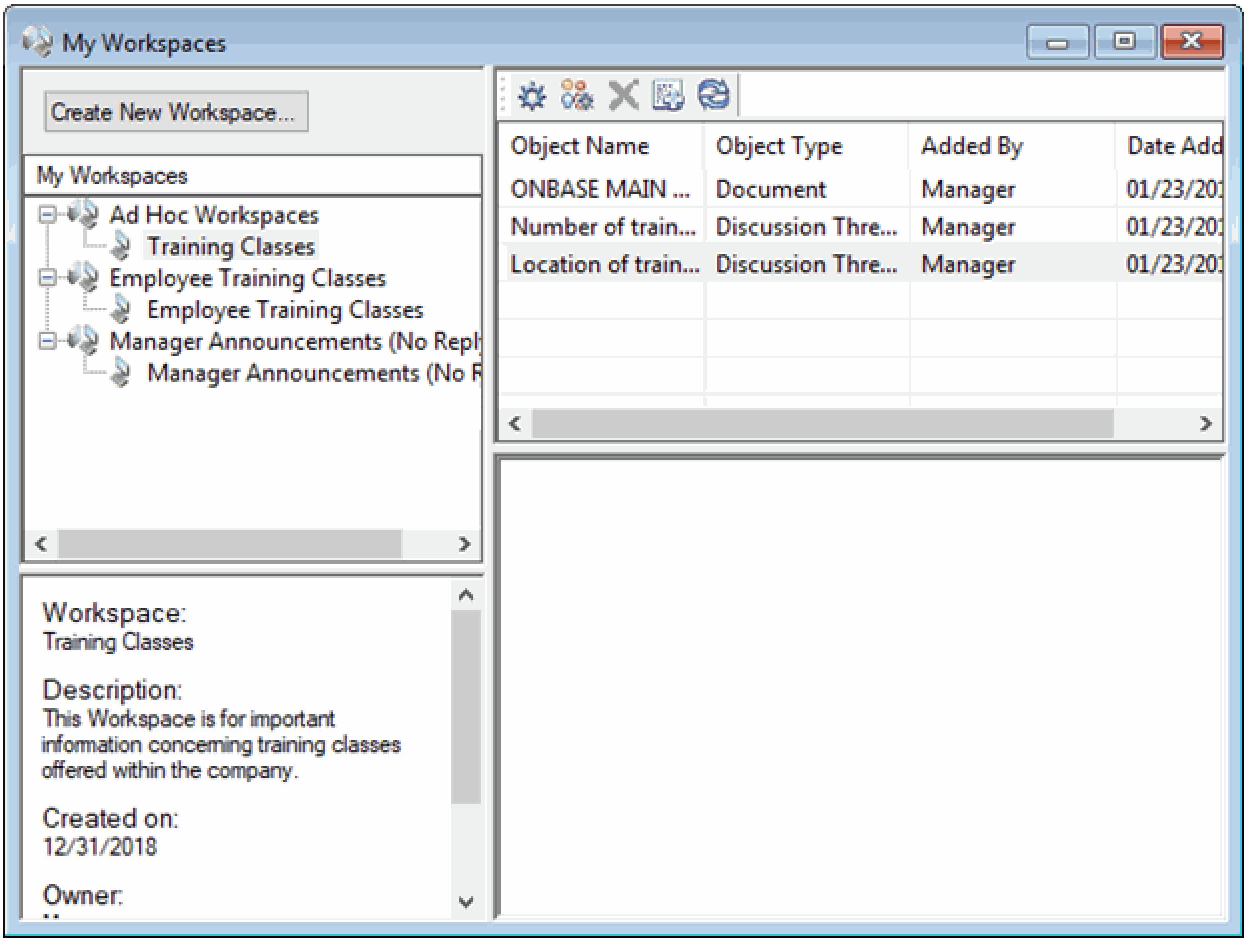
You can apply security settings to a discussion thread that limit which users can view the discussion thread in the workspace.

To apply security settings to a discussion thread:

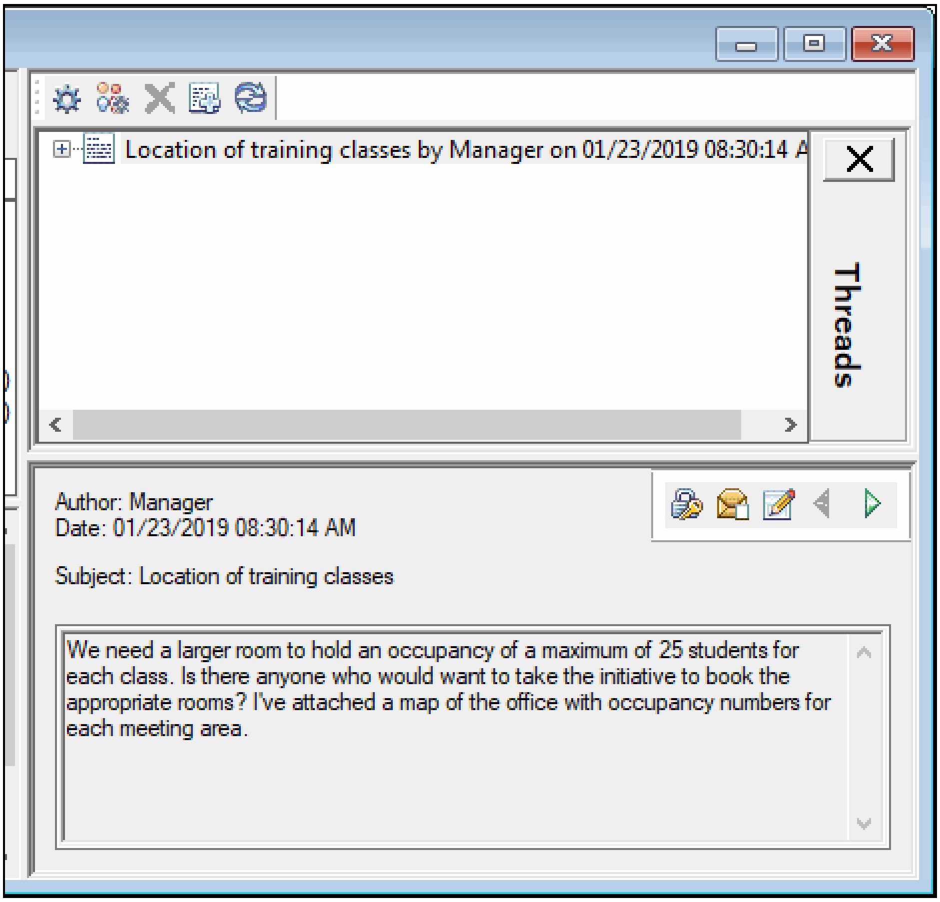
1. Select **User | Collaboration | Collaboration Workspaces**. The **My Workspaces** window is displayed.



2. From the **My Workspaces** pane, select a workspace. The workspace information and objects are displayed.



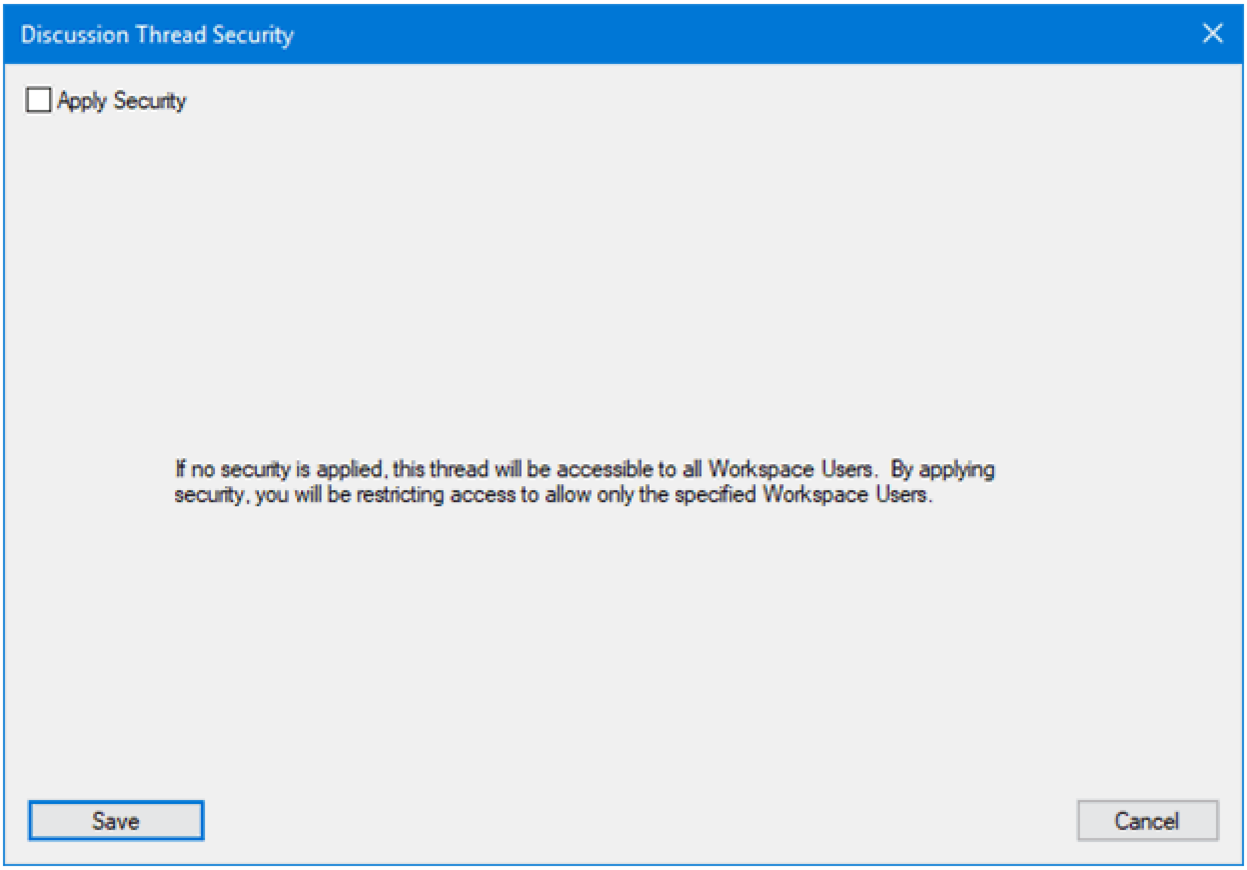
3. From the object pane, double-click a discussion thread. The discussion thread is displayed in the object viewer.



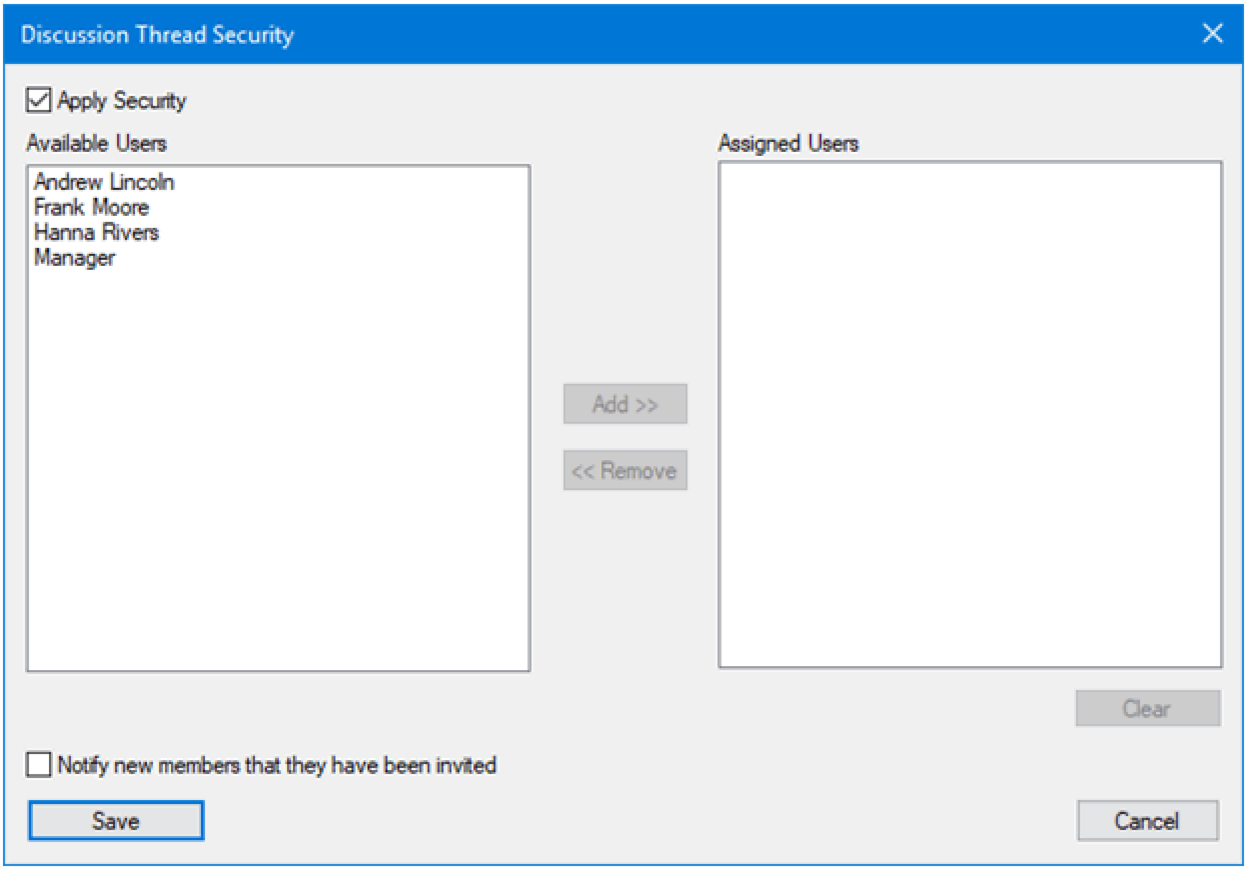
4. From the object viewer toolbar, click **Apply Security**.

Note: Depending on your system configuration, the **Apply Security** button may not be available. See your system administration for questions regarding discussion thread level security.

The **Discussion Thread Security** dialog box is displayed.



5. Select **Apply Security**. Available users to apply security settings to are displayed.



6. From the **Available Users** list, select the users you want to give access to the discussion thread.
7. Click **Add**. The selected users are moved to the **Assigned Users** list.

Note: Assigned users have the same user rights in the discussion thread as the user rights assigned to the workspace.

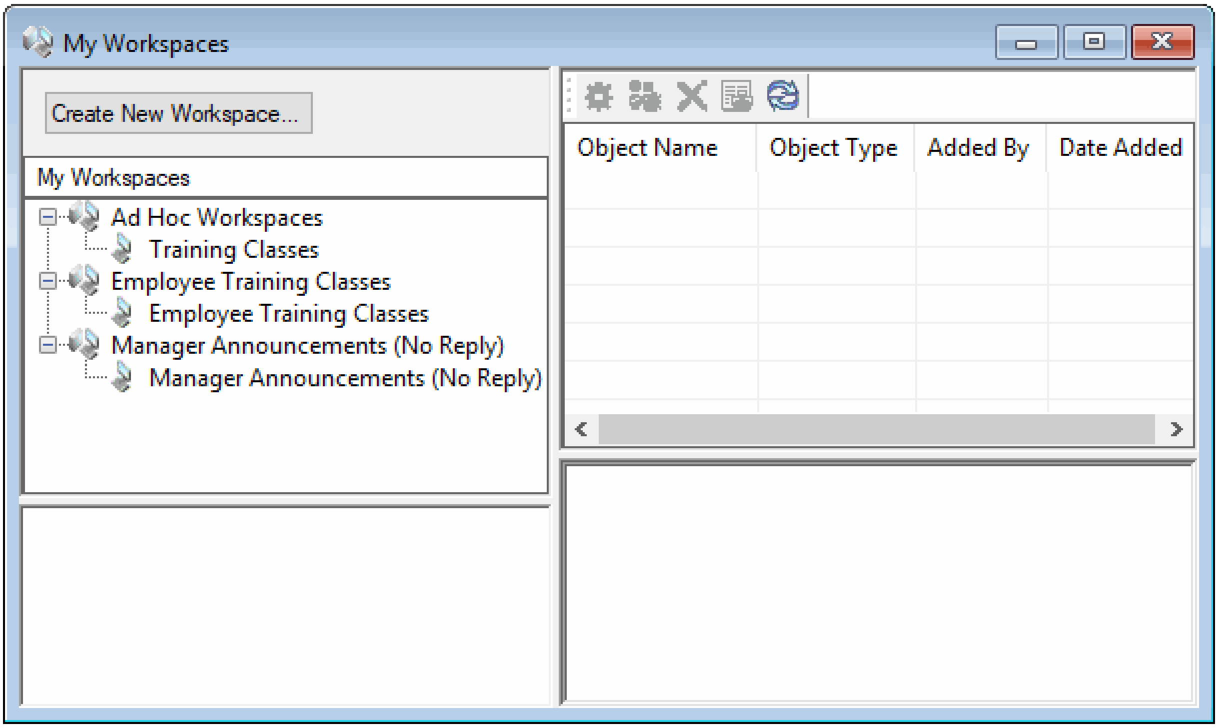
8. Select **Notify new members that they have been invited** if you want to send email notifications to the users in the **Assigned Users** list that they are invited to view the discussion thread.
9. Click **Save**.

Subscribing to Notifications for a Discussion Thread

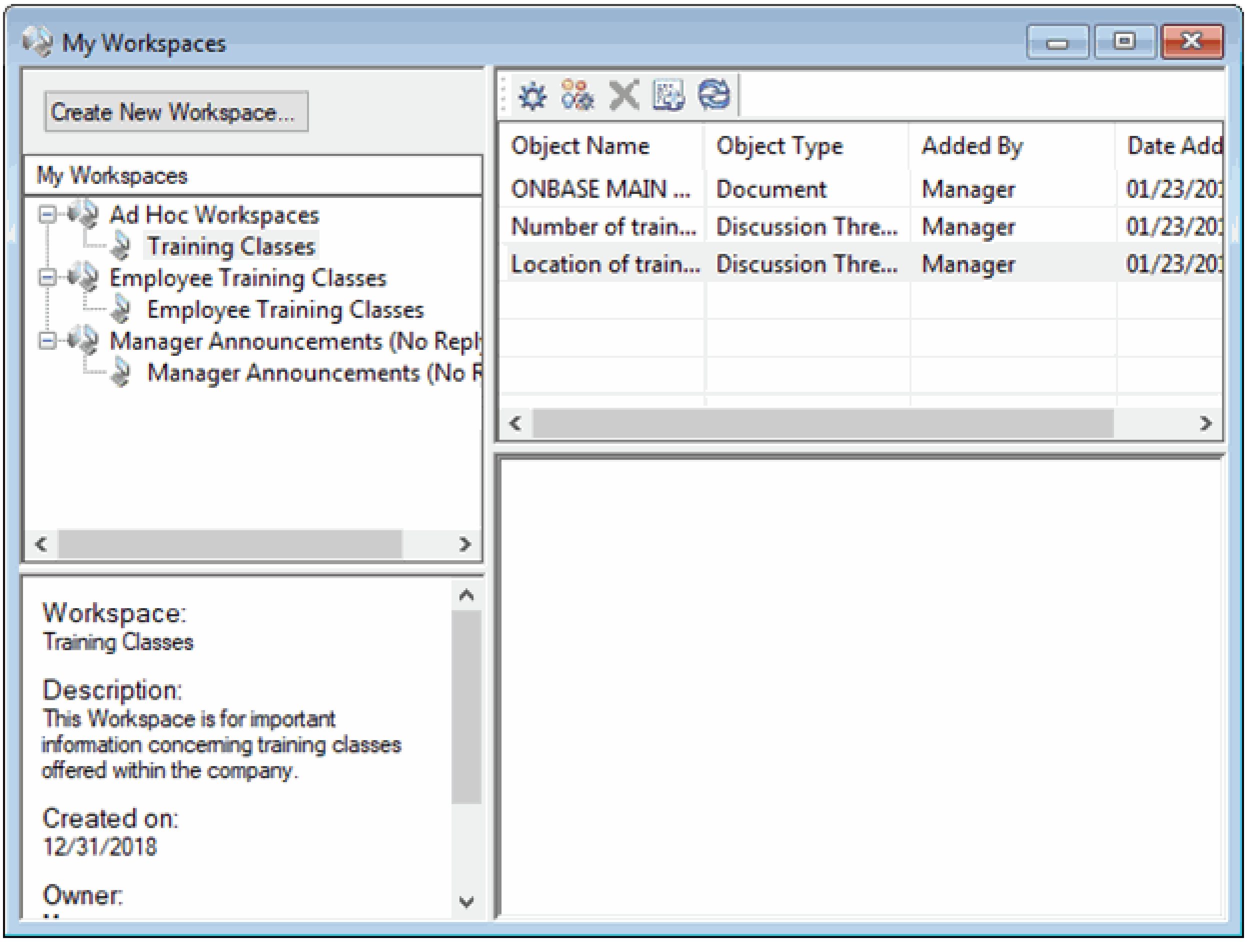
You can subscribe to receive notifications for a discussion thread when a new post is added.

To subscribe to discussion thread notifications:

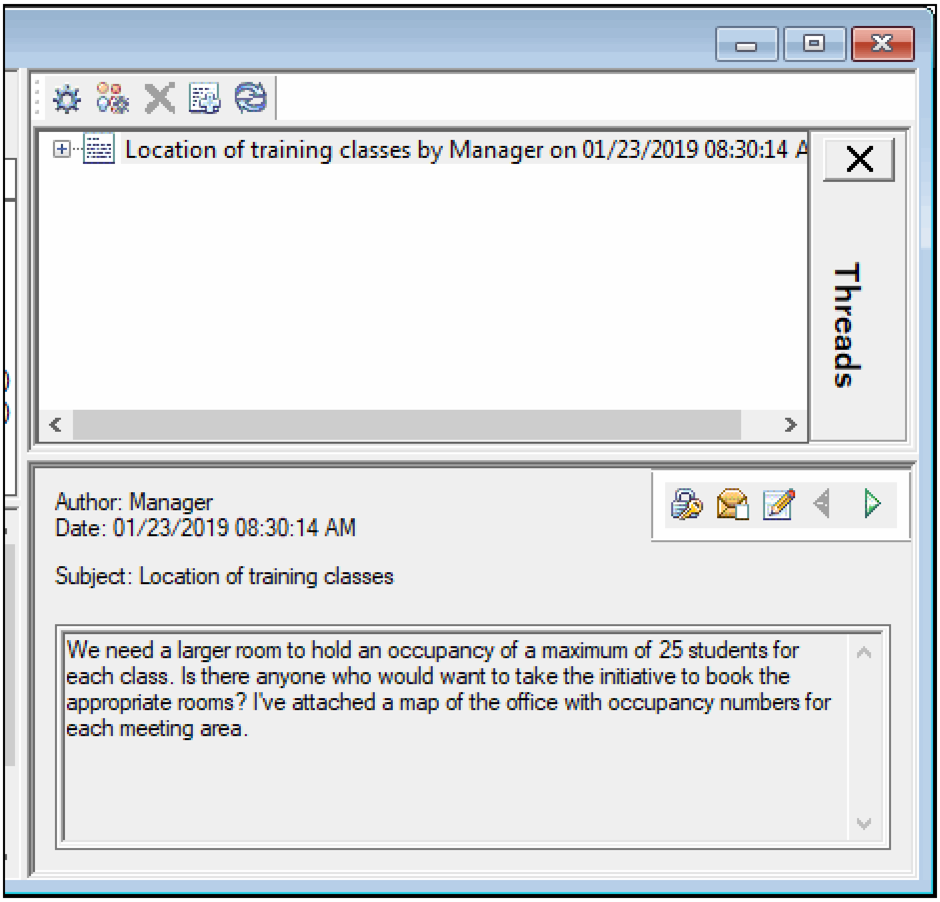
1. Select **User | Collaboration | Collaboration Workspaces**. The **My Workspaces** window is displayed.



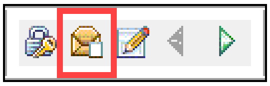
2. From the **My Workspaces** pane, select a workspace. The workspace information and objects are displayed.



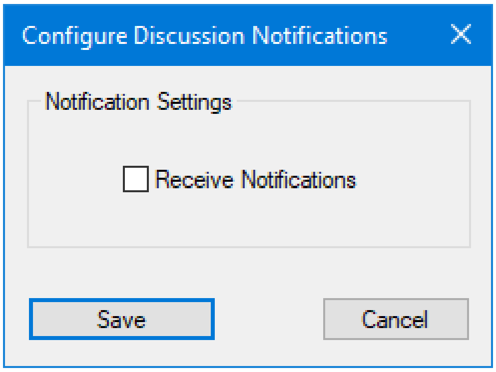
3. From the object pane, double-click a discussion thread. The discussion thread is displayed in the object viewer.



4. From the object viewer toolbar, click **Configure Notifications for this Thread**.



The **Configure Discussion Notifications** dialog box is displayed.



5. Select **Receive Notifications**.
6. Click **Save**.

Applying WorkView Objects to a Workspace

You can apply WorkView objects to a workspace. You can attach documents to a WorkView object and copy WorkView objects from the workspace.

If you delete a WorkView object from OnBase, the WorkView object is deleted from all Collaboration workspaces.

See the following topics for more information:

- Attaching a Document to a WorkView Object from a Workspace on page 217
- Copying WorkView Objects from a Workspace on page 217

Attaching a Document to a WorkView Object from a Workspace

You can attach a document to a WorkView object from a workspace to see all parts of a project you are working on.

To attach a document to a WorkView object from a workspace:

1. From a workspace, select a WorkView object.
2. Select the **Document** tab.
3. Click the **Attach Document** button.
4. Select a document.
5. Click **OK**.

Copying WorkView Objects from a Workspace

You can copy WorkView objects from a workspace.

To copy WorkView objects from a workspace:

1. From a workspace, select a WorkView object.
2. Click the **Copy Object** button.
3. The copy of the object will be available in WorkView.

Note: The object will not appear in Collaboration unless you assign the copy to a workspace.

Note: If the WorkView object does not have a Class Title, its name in the Workspace will be blank. The WorkView object must be configured with a Class Title in order for OnBase to be able to correctly differentiate between multiple WorkView objects in a Workspace.

If the object is reconfigured to have a Class Title after being added to the Workspace, the object will have to be changed and saved for the Class Title to be displayed correctly.

Collaboration around a Document or WorkView Object

Collaboration does not need to take place in a Workspace. You can create a Discussion Thread around a particular document or Workspace Object and invite specific users to take part in the discussion.

All Discussion Thread activity can be broadcast in the form of e-mail notifications to users of the thread.

See the topics below for details on using the document level Discussion Threads or using WorkView with the Collaboration module:

- Collaborating on Documents or WorkView Objects Independently of a Workspace on page 218
- Creating a Document Level Discussion Thread Independent of a Workspace on page 228
- View all Posts for a Document Independent of a Workspace on page 218
- Collaborating on Documents or WorkView Objects Independently of a Workspace on page 218

Note: See the **WorkView | Case Manager** documentation for more details on using and configuring WorkView Objects.

Collaborating on Documents or WorkView Objects Independently of a Workspace

You can apply Discussion Threads to documents or WorkView objects, which are completely independent of a Workspace.

See the following topics for details on these types of Discussion Threads:

- View all Posts for a Document Independent of a Workspace on page 218
- Replying to a Post Independent of a Workspace on page 220
- Applying Security Settings to a Discussion Thread Independent of a Workspace on page 224
- Subscribing to Notifications for a Discussion Thread Independent of a Workspace on page 226
- Creating a Document Level Discussion Thread Independent of a Workspace on page 228

View all Posts for a Document Independent of a Workspace

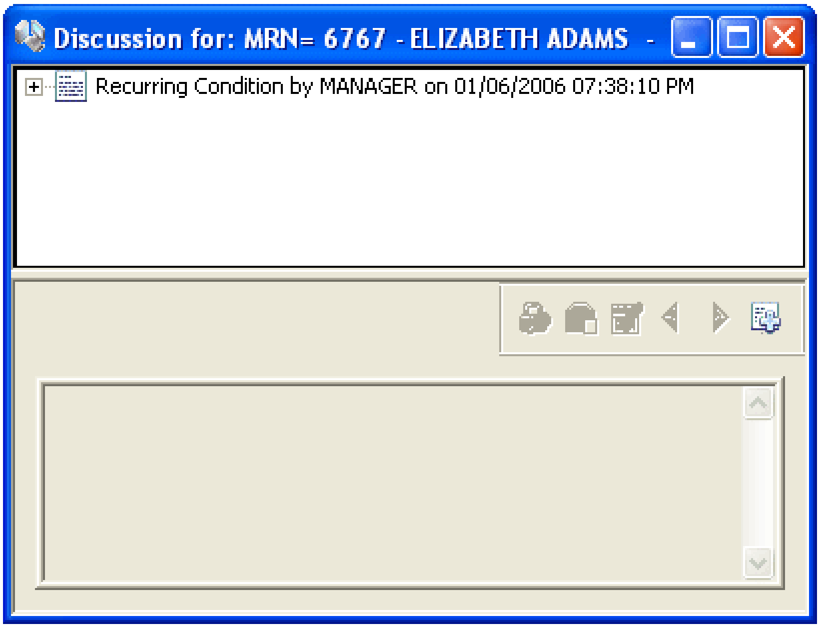
If a document contains a discussion thread independent of a workspace, you can view all posts of the discussion thread from a Document Search Results list or any open document.

To view discussion thread posts for a document independent of a workspace:

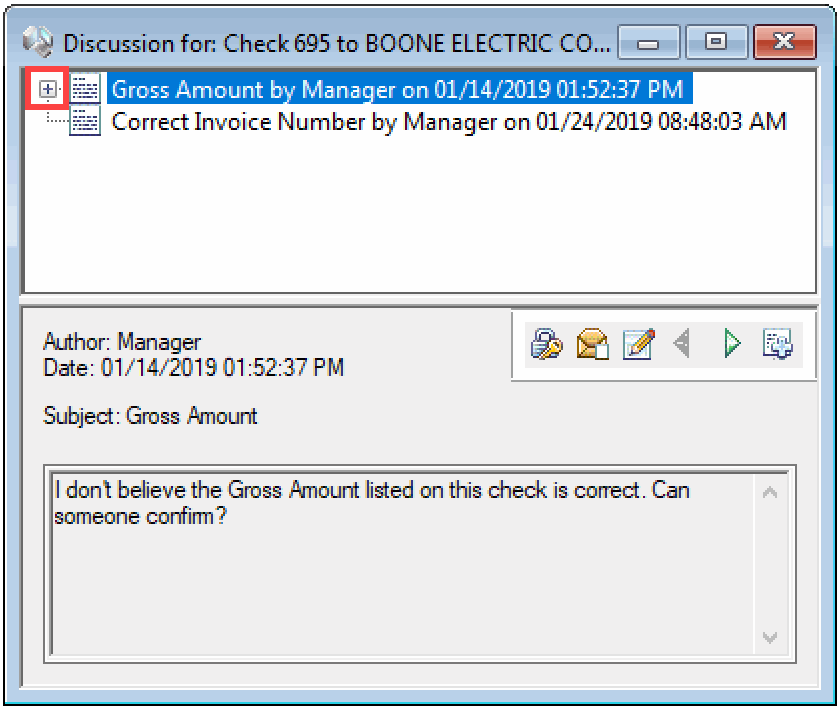
1. Right-click and select **Collaboration | View all Posts** from one of the following locations:
   - A listed document in a Document Search Results list
   - Any open document

Tip: You can also view posts from an open document by double-clicking on the **Thread(s)** section displayed on the status bar of the document.

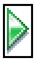
The **Discussion for** window is displayed.



2. Click on the plus button next to a thread to expand the thread and display all available posts.



3. Click a post. The post is displayed along with the following descriptions:
   - **Author**: The user that created the discussion thread post.
   - **Date**: The date the discussion thread post was created.
   - **Subject**: The name of the discussion thread.
4. Click the **Next Post** button to navigate to posts that are next in the discussion thread.



5. Click the **Previous Post** button to navigate back to previous posts in the discussion thread.

Replying to a Post Independent of a Workspace

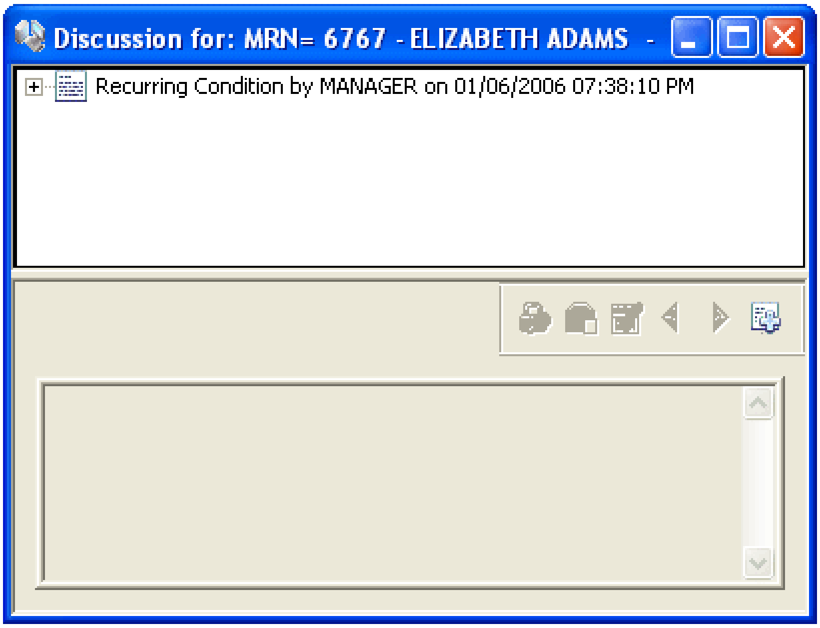
You can reply to a post independent of a workspace from the **Discussion for** window of a document.

To reply to a post:

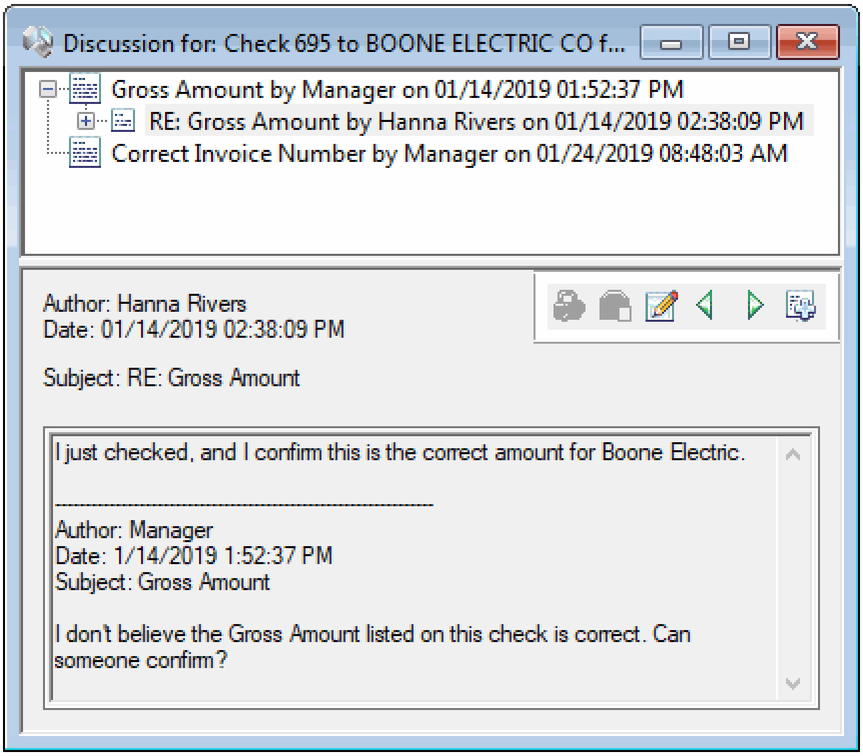
1. Right-click and select **Collaboration | View all Posts** from one of the following locations:
   - A listed document in a Document Search Results list
   - Any open document

Tip: You can also view posts from an open document by double-clicking on the **Thread(s)** section displayed on the status bar of the document.

The **Discussion for** window is displayed.

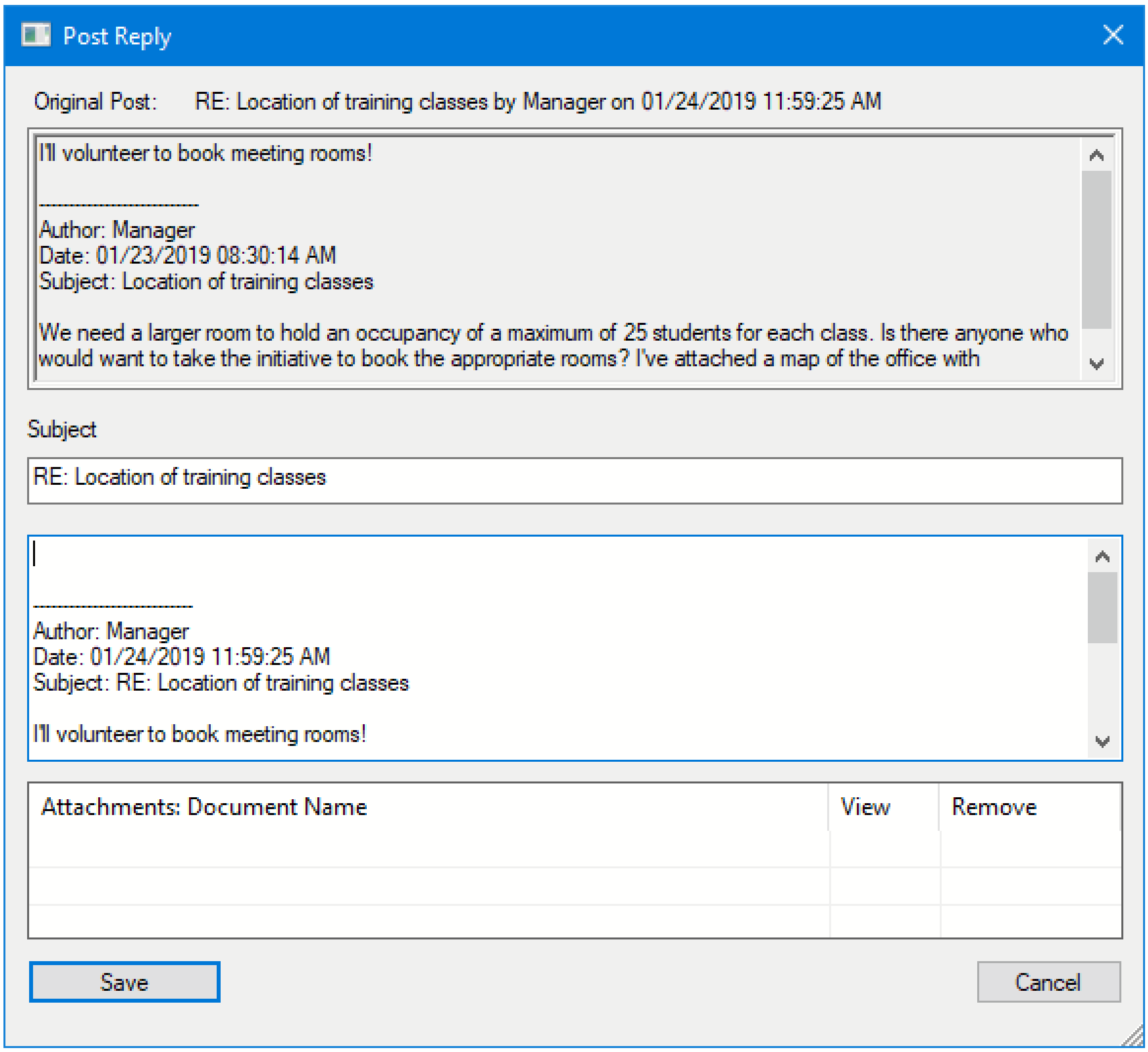


2. Select a post to reply to from the discussion thread. The post is displayed.



3. Click the **Reply** button.

The **Post Reply** dialog box is displayed.



4. Edit the subject of the post in the **Subject** field as necessary.
5. Enter the body of the text in the field below the **Subject** field.

Note: You are allowed a maximum of 4096 characters in a reply.

6. Attach any documents to the discussion thread, if necessary. See Attaching Documents to a Discussion Thread on page 198 for more information on attaching documents.
7. Click **Save**. Your reply is posted in the discussion thread.

Applying Security Settings to a Discussion Thread Independent of a Workspace

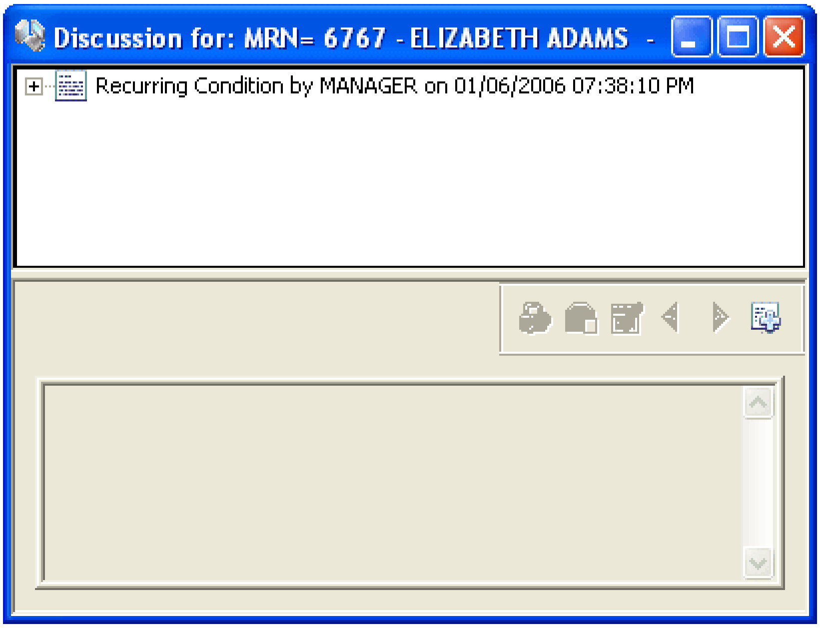
You can apply security settings to a discussion thread that limit which users can view the discussion thread for a document.

To apply security settings to a discussion thread:

1. Right-click and select **Collaboration | View all Posts** from one of the following locations:
   - A listed document in a Document Search Results list
   - Any open document

Tip: You can also view posts from an open document by double-clicking on the **Thread(s)** section displayed on the status bar of the document.

The **Discussion for** window is displayed.

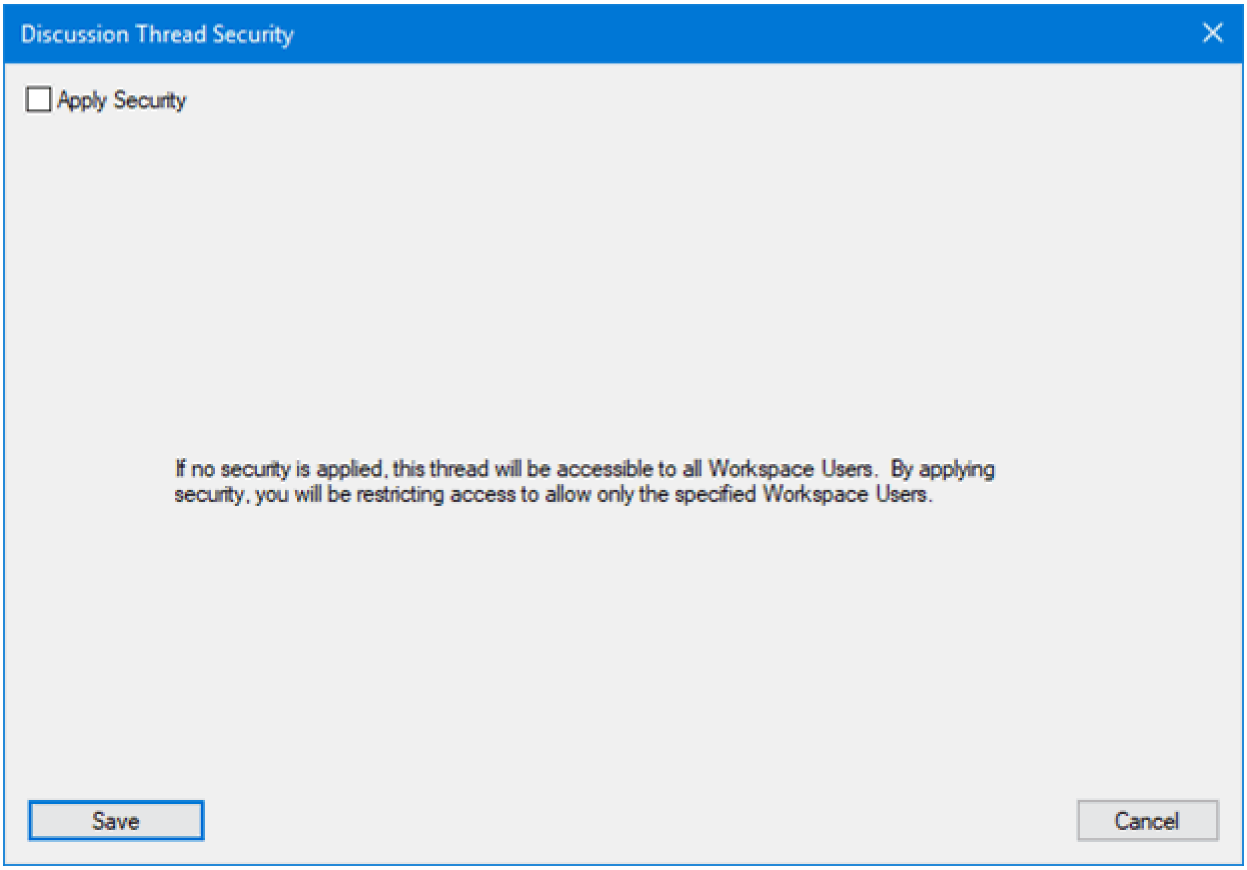


2. Select the discussion thread you want to apply security settings to.

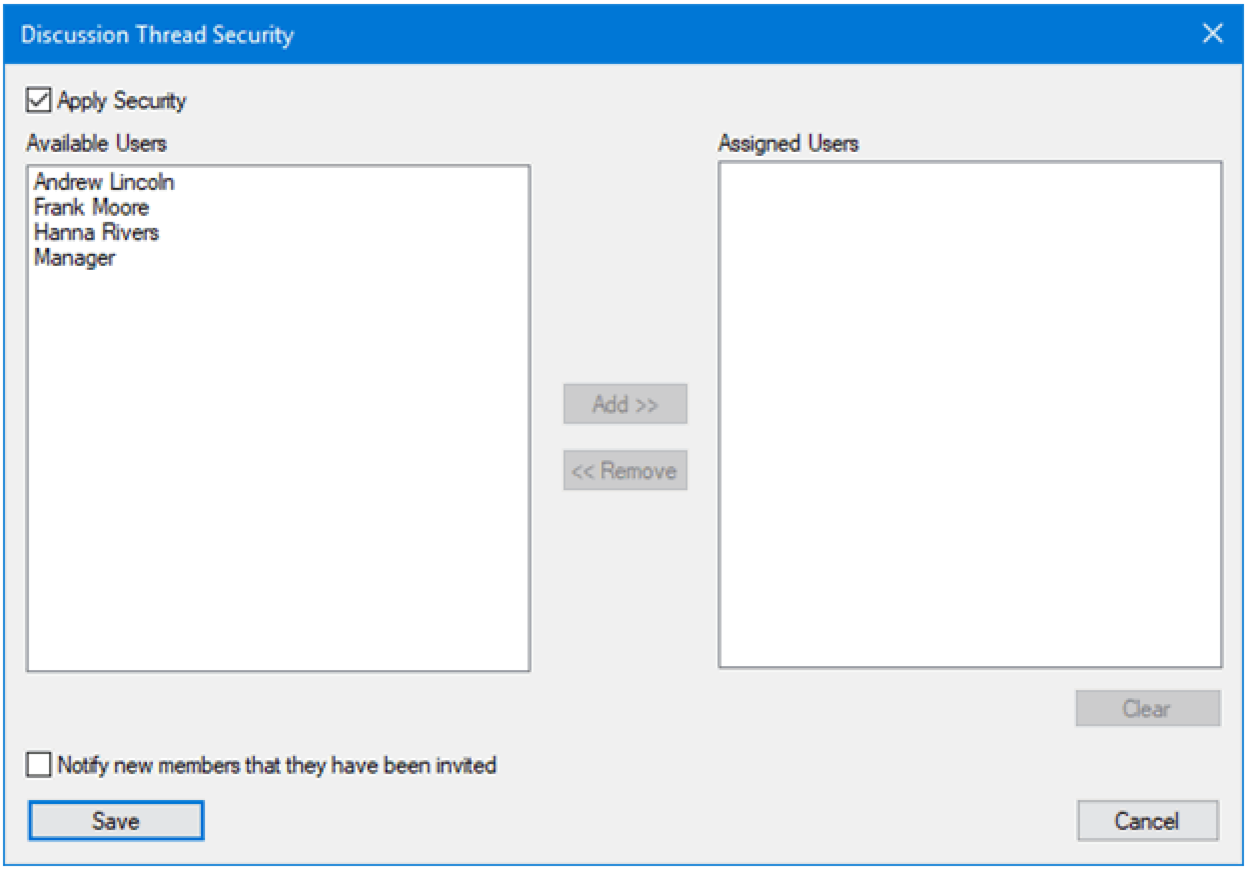
Note: You must select the discussing thread not a post within a discussion thread.

3. From the toolbar, click the **Apply Security** button.

The **Discussion Thread Security** dialog box is displayed.



4. Select **Apply Security**. Available users to apply security settings to are displayed.



5. From the **Available Users** list, select the users you want to give access to the discussion thread.
6. Click **Add**. The selected users are moved to the **Assigned Users** list.

Note: Assigned users have the same user rights in the discussion thread as the user rights assigned to the workspace.

7. Select **Notify new members that they have been invited** if you want to send email notifications to the users in the **Assigned Users** list that they are invited to view the discussion thread.
8. Click **Save**.

Subscribing to Notifications for a Discussion Thread Independent of a Workspace

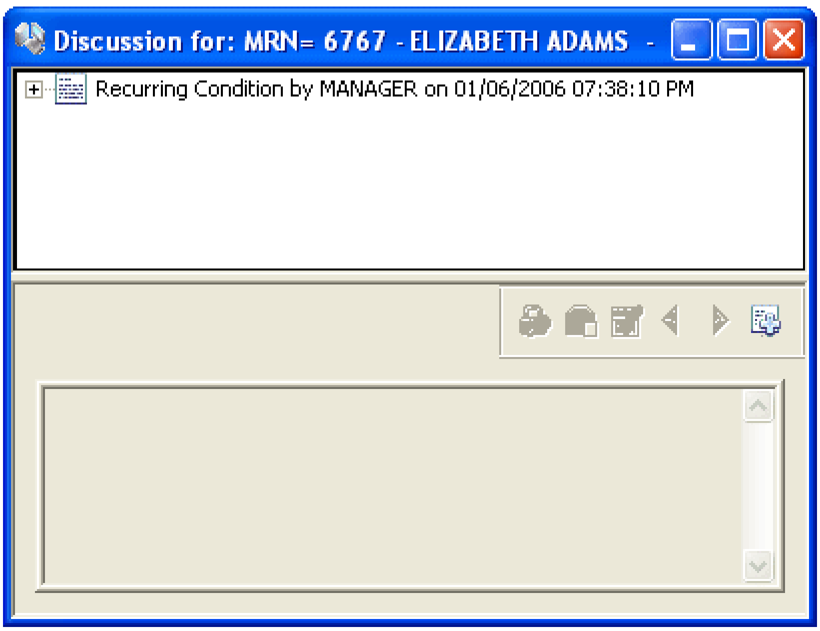
You can subscribe to notifications for a specific discussion thread to receive emails about new posts from other users.

To subscribe to notifications:

1. Right-click and select **Collaboration | View all Posts** from one of the following locations:
    - A listed document in a Document Search Results list
    - Any open document

Tip: You can also view posts from an open document by double-clicking on the **Thread(s)** section displayed on the status bar of the document.

The **Discussion for** window is displayed.

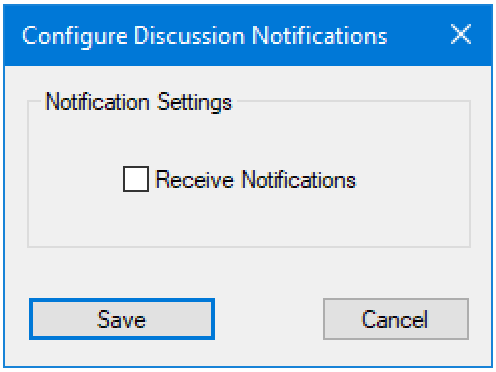


2. Select the discussion thread you want to apply security settings to.

Note: You must select the discussing thread not a post within a discussion thread.

3. From the toolbar, click the **Configure Notifications for this Thread** button.

The **Configure Discussion Notifications** dialog box is displayed.



4. Select **Receive Notifications** to receive notifications in your email about new posts or documents added to the discussion thread.
5. Click **Save**.

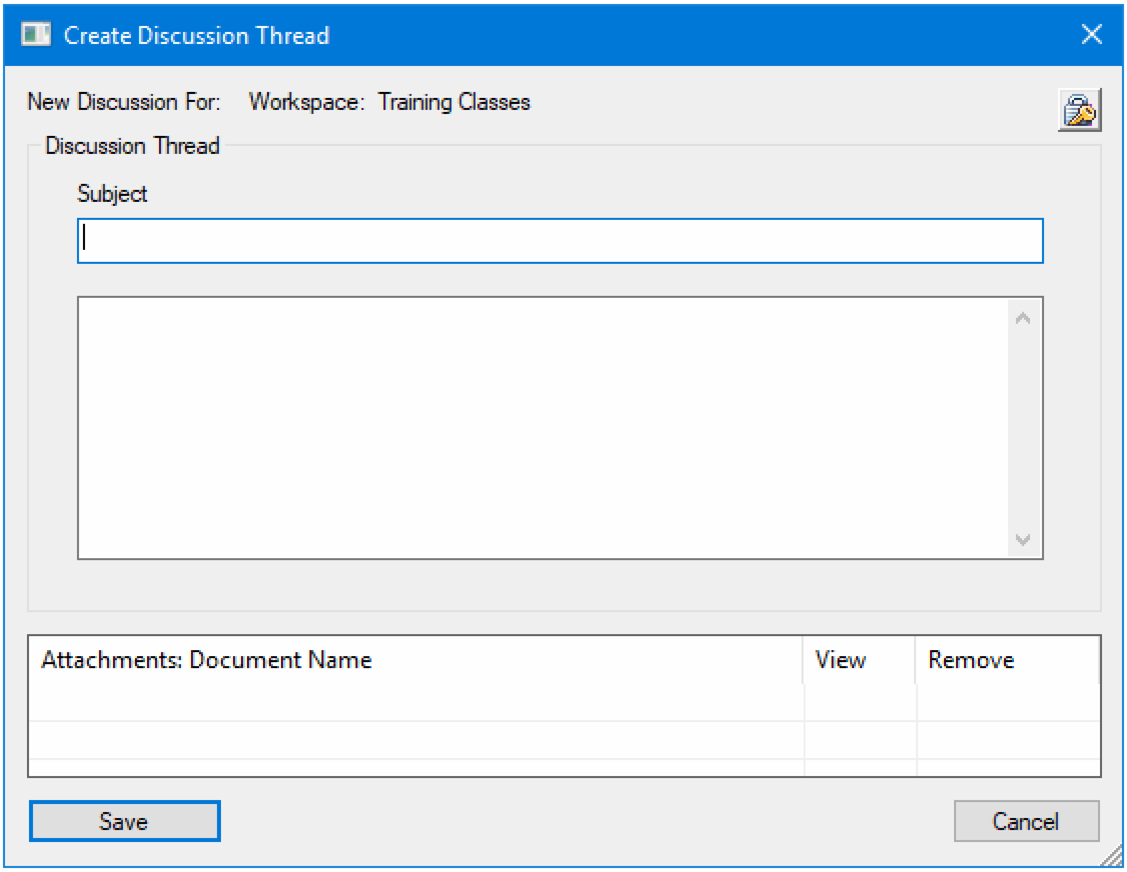
Creating a Document Level Discussion Thread Independent of a Workspace

Documents do not have to be in a workspace to be associated with a discussion thread. Documents can contain discussion threads independently of workspace threads.

Tip: You can start a discussion thread independent of a workspace on a document that is added to a workspace. Your discussion thread is then available from any Document Search Results list or from the open document, regardless if it is viewed from the workspace or from the document.

To create a document level discussion thread independent of a workspace:

1. From a Document Search Results list, or any open document, right-click and select **Collaboration | Create New Discussion**. The **Create Discussion Thread** dialog box is displayed.



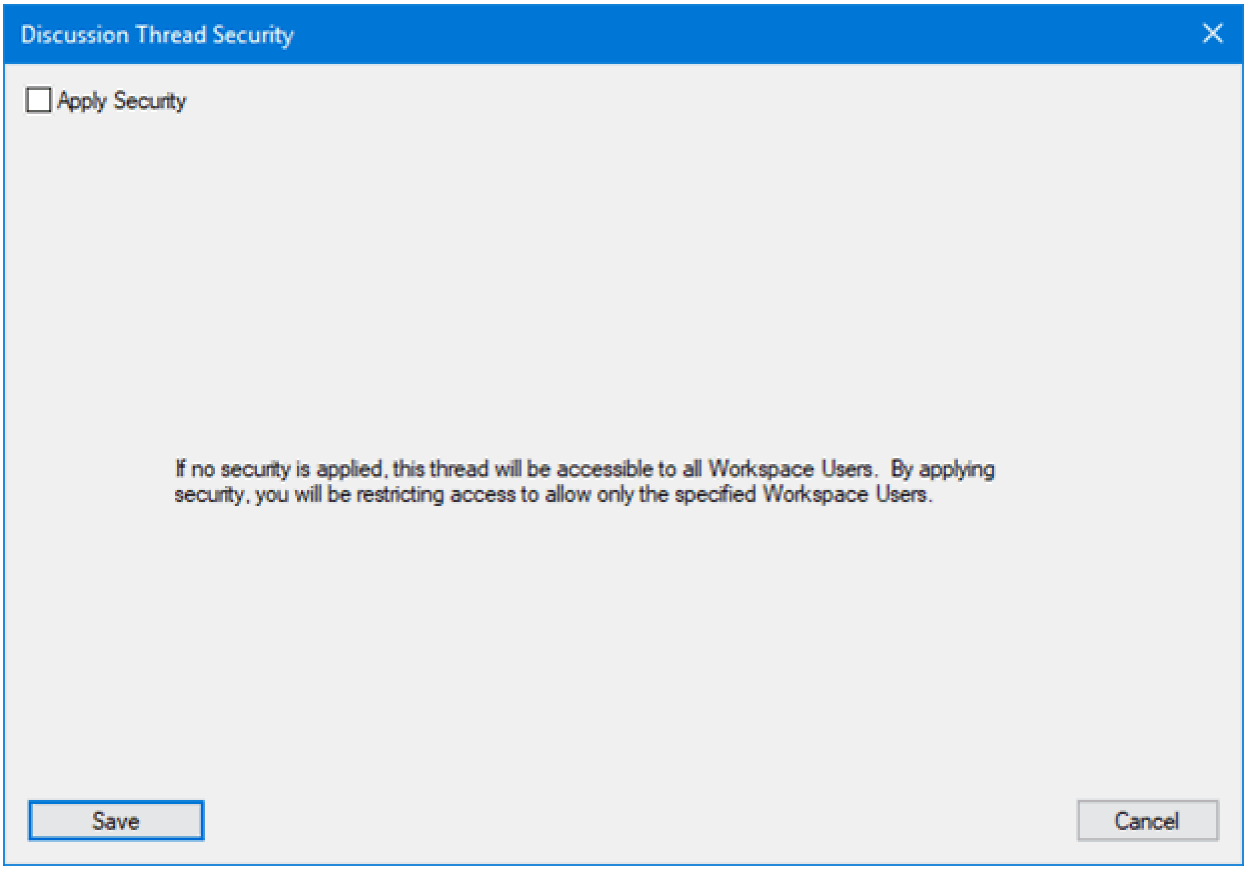
2. Enter a subject for the discussion thread in the **Subject** field.
3. Enter the text to start the discussion thread in the empty field below the **Subject** field.

Note: The maximum character limit for this field is 4096.

4. Attach any documents to the discussion thread, if necessary. See Attaching Documents to a Discussion Thread on page 198 for more information on attaching documents.

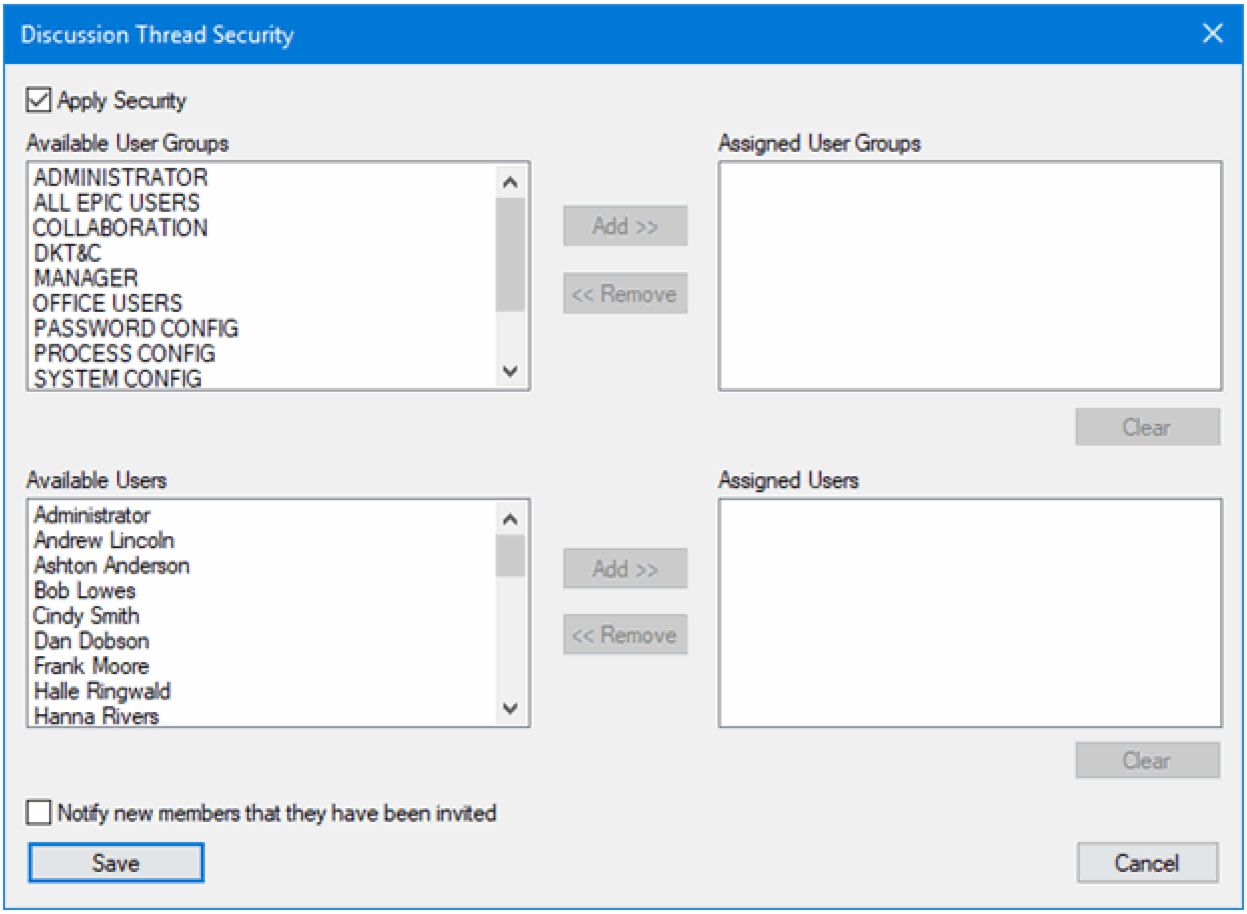
5. Click the **Apply Security** button to add security to the discussion thread, if necessary.

The **Discussion Thread Security** dialog box is displayed.



Note: Depending on your system configuration, the **Apply Security** button may not be available. See your system administration for questions regarding discussion thread level security.

6. Select **Apply Security**. Available users and user groups are displayed to apply security to.



7. From the **Available User Groups** list, select the users you want to give access to the discussion thread.
8. Click **Add**. The selected users are moved to the **Assigned User Groups** list.

Note: Assigned user groups have the same user group rights in the discussion thread as the user group rights assigned to the workspace.

9. From the **Available Users** list, select any individual users you want to give access to the discussion thread.
10. Click **Add**. The selected users are moved to the **Assigned Users** list.

Note: Assigned users have the same user rights in the discussion thread as the user rights assigned to the workspace.

11. Select **Notify new members that they have been invited** if you want to send email notifications to the users in the **Assigned Users** list that they are invited to view the discussion thread.
12. Click **Save**.

Collaboration Actions Logged in Document History

The following items are logged in Document History for Collaboration:

- Create a post to start a new Discussion Thread on a document
- Reply to a post on a document level Discussion Thread
- Add a document to a Workspace
- Remove a document from a Workspace

Accessing General OnBase Functionality

When viewing an OLE document in a Collaboration Workspace, you can access general OnBase functionality by navigating to the Document menu option. For other types of document, this functionality can be accessed by right-clicking on the document.

Usage - Unity Client

Using the Collaboration module in the Unity Client allows users to collaborate on projects in a familiar environment using discussion threads attached to OnBase documents or WorkView objects.

Note: It is not possible to delete or edit a discussion thread or a reply.

The following topics contain information on using discussion threads in the Unity Client:

- Viewing a Discussion Thread on page 233
- Replying to a Discussion Thread on page 237
- Starting a New Discussion Thread on page 239
- Assigning Specific Users to Discussion Threads on page 241
- Subscribing to a Discussion Thread on page 244

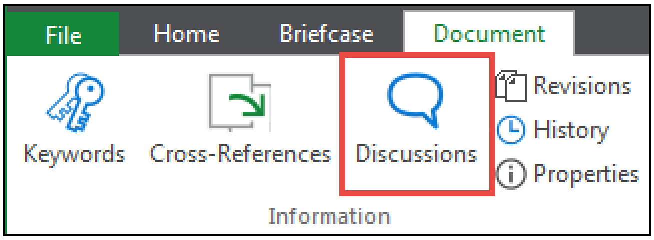
Viewing a Discussion Thread

You can view a current discussion thread on a document or WorkView object in the Unity Client.

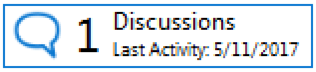
Note: When viewing a discussion thread in the Unity Client, you can only view the top 20 nested levels of the discussion thread. Discussion threads containing more than 20 levels can be viewed in their entirety in the OnBase Client and the Web Client.

To access a discussion thread on a document or WorkView object:

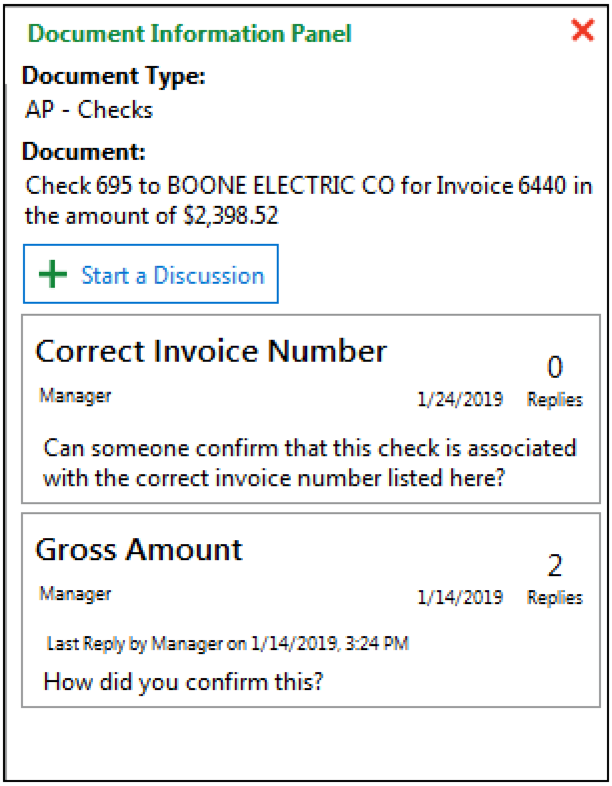
1. Open the **Discussions** pane by performing one of the following actions:
   - From a Document Search Results List or an open document, right-click on the document and select **Discussions**.
   - From the **Document** tab or the **WorkView** tab, click the **Discussions** button.



   - From an open document or WorkView object, select the **Discussions** indicator.

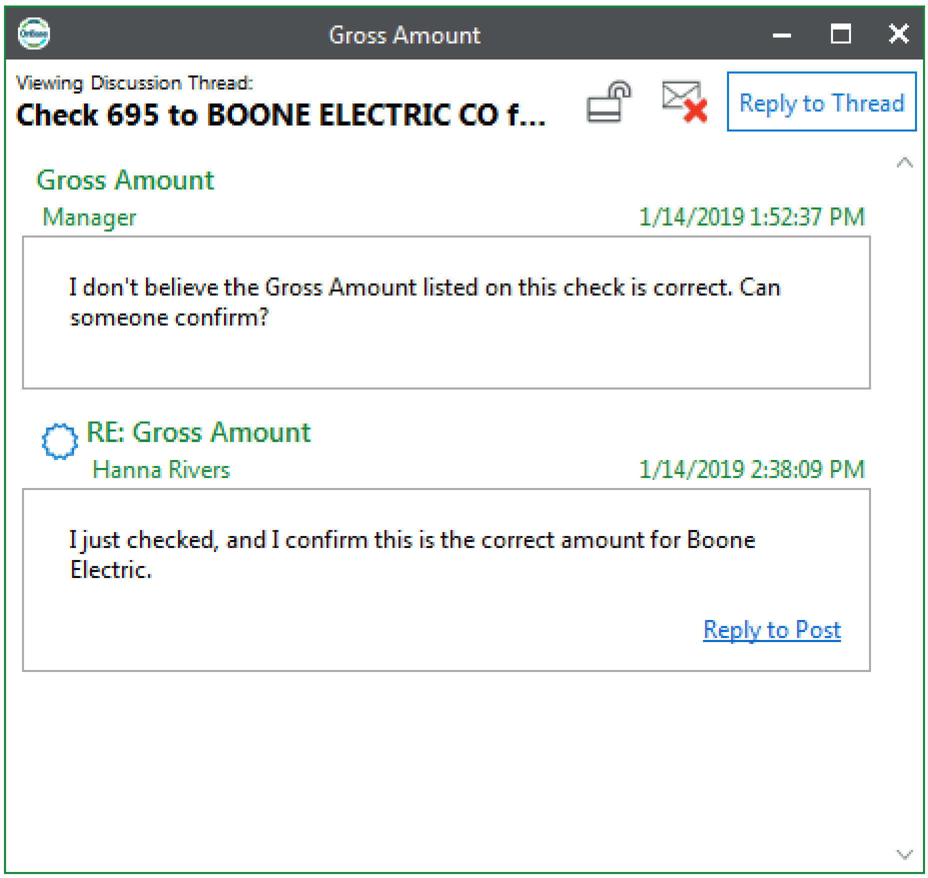


The **Discussions** pane is displayed in the **Document Information Panel**.

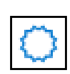


2. Click the discussion thread you want to view. The discussion thread window is displayed.

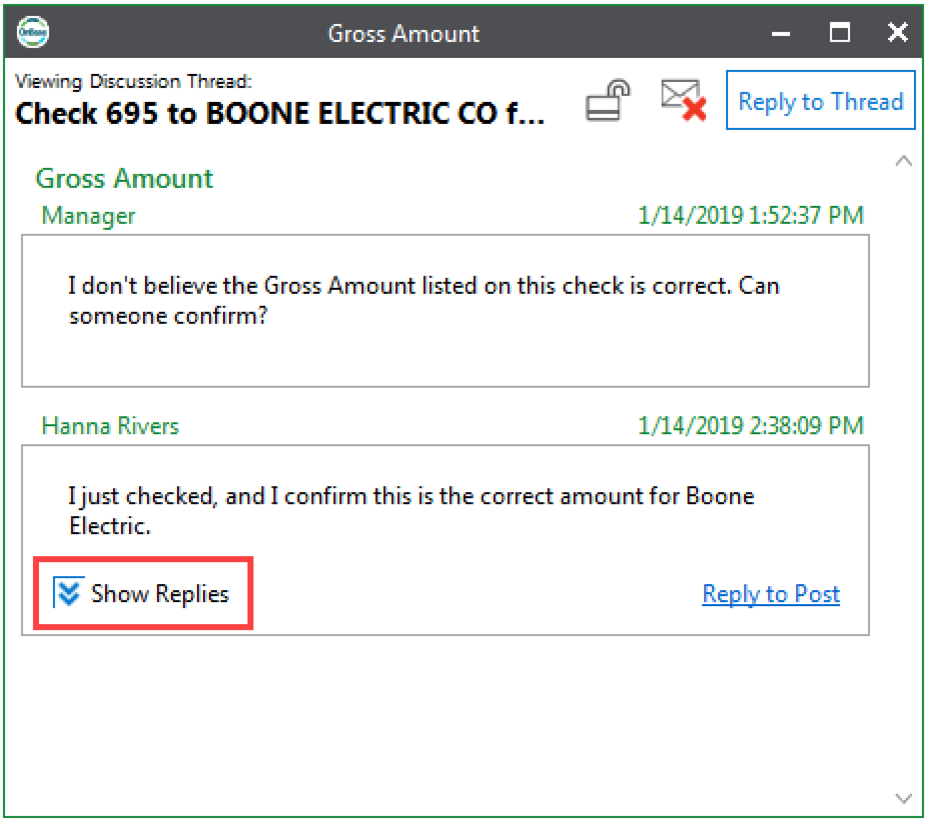
Tip: You can also view the most recent reply by hovering the mouse over the discussion thread in the **Discussions** pane.



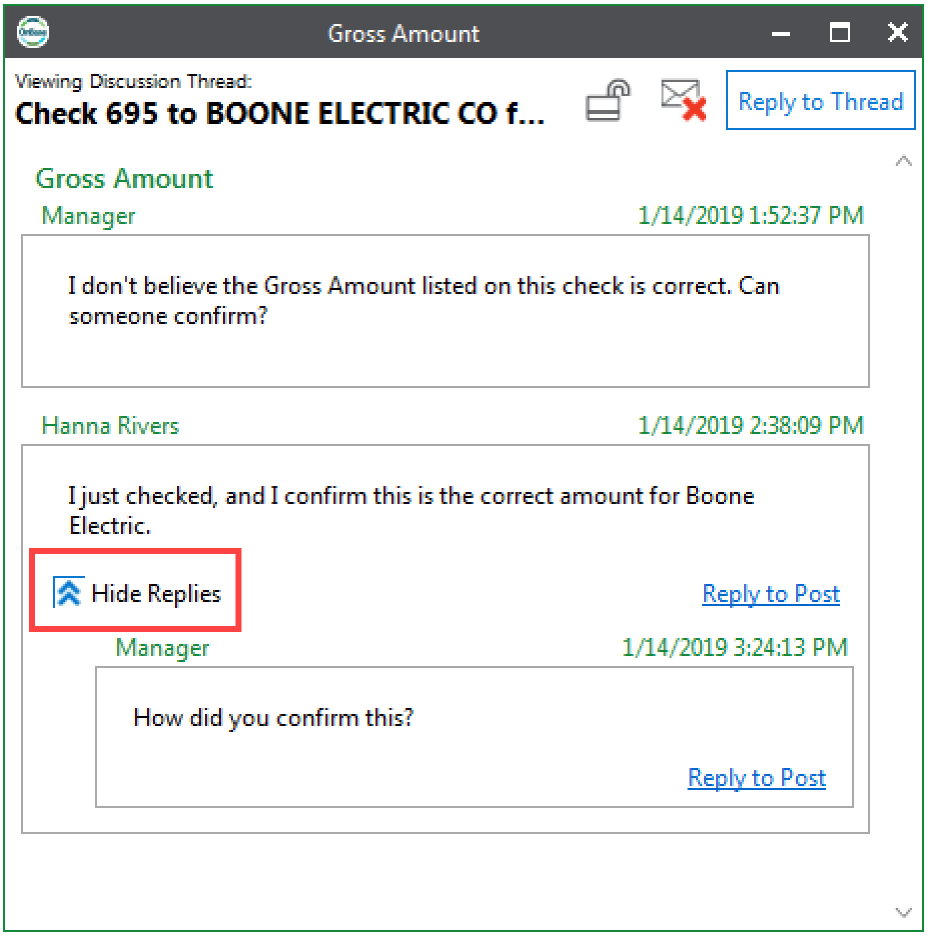
If a discussion thread has unread posts, the following icon is displayed next to the title of the discussion thread and next to the title of the unread post:



3. If a post contains replies that are not displayed, click the **Show Replies** button. This button is only displayed if posts are hidden.



4. Click the **Hide Replies** button to hide all the replies to a post.

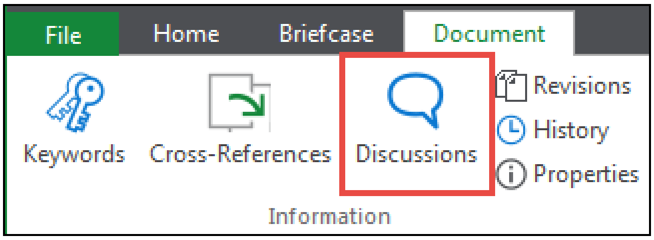


Replying to a Discussion Thread

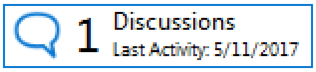
You can reply to a discussion thread through the **Discussions** pane.

To reply to a discussion thread:

1. Open the **Discussions** pane by performing one of the following actions:
   - From a Document Search Results List or an open document, right-click on the document and select **Discussions**.
   - From the **Document** tab or the **WorkView** tab, click the **Discussions** button.

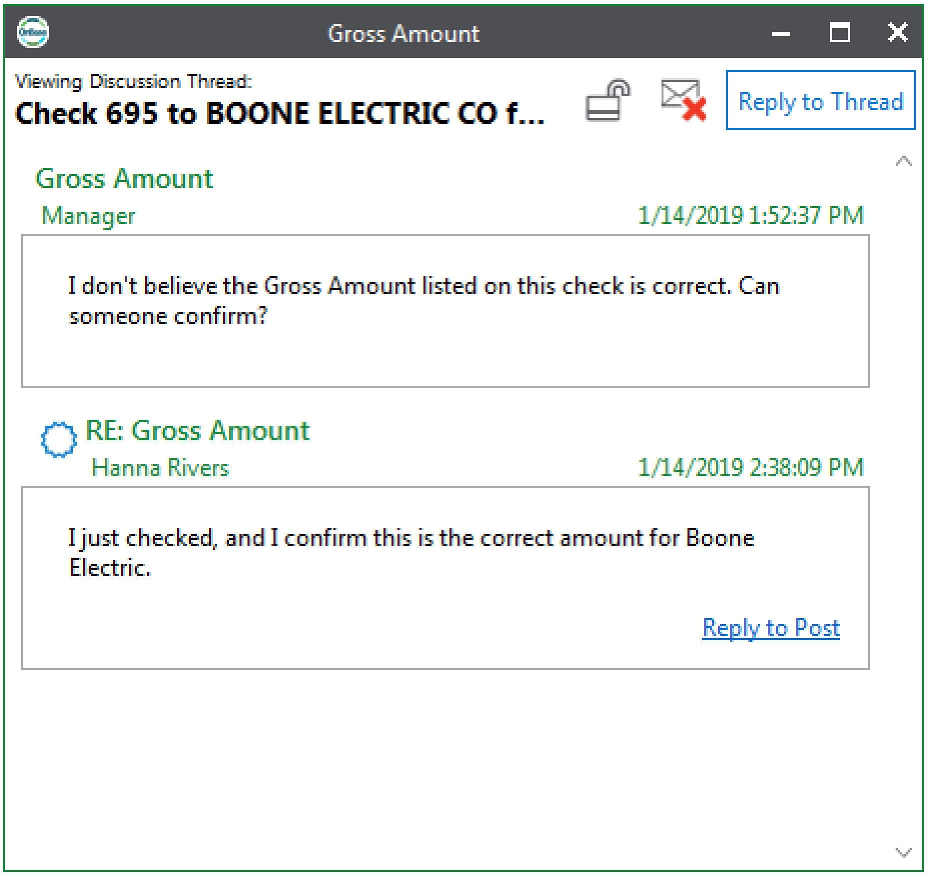


   - From an open document or WorkView object, select the **Discussions** indicator.



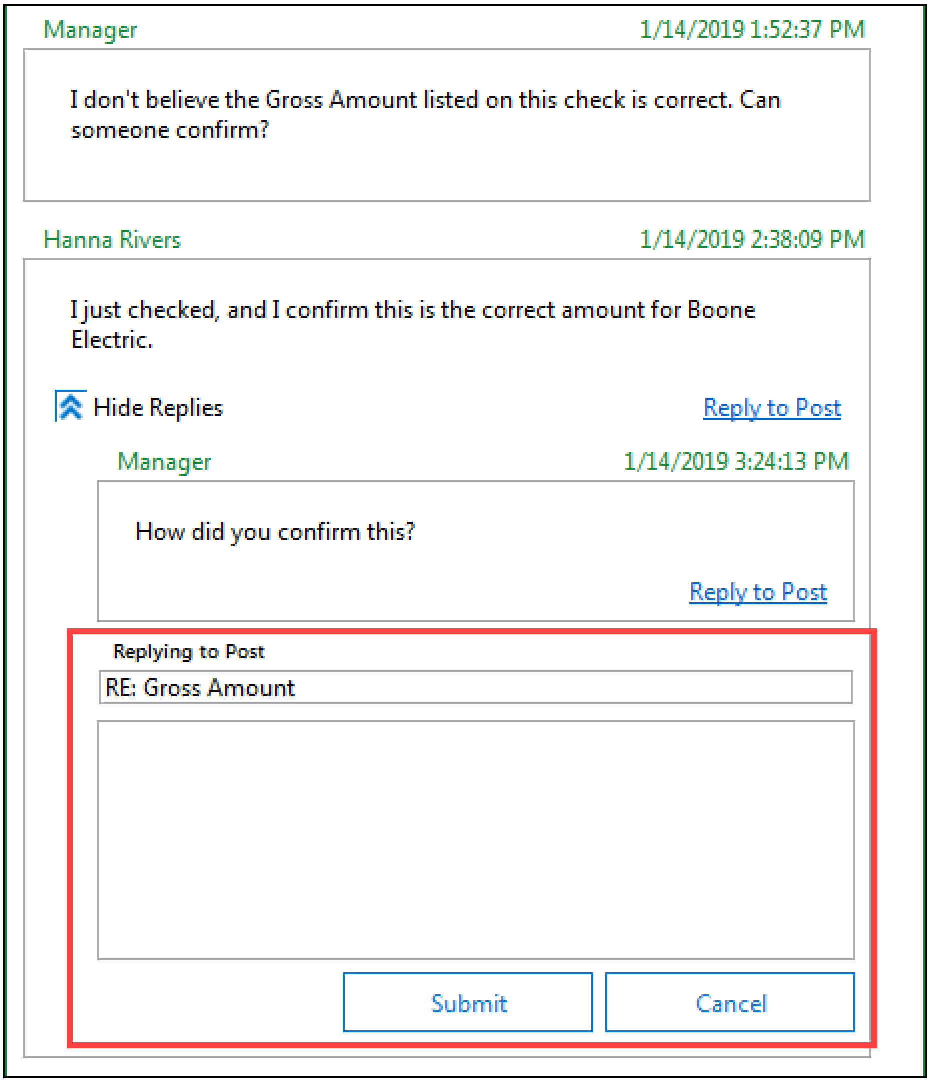
   All existing discussion threads are displayed in the **Discussions** pane.

2. Click the discussion thread you want to reply to. The discussion thread window is displayed.



3. Select one of the following options:
   - To reply to the initial post of the discussion thread, click **Reply to Thread**.
   - To reply to a specific post, click **Reply to Post** in that post.

   A new text box is displayed.



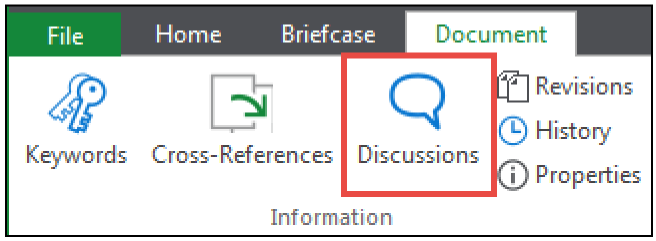
4. Edit the subject of the reply in the subject field as necessary.
5. Enter the body of your message into the text field.
6. Click **Submit**. Your reply is added to the discussion thread.

Starting a New Discussion Thread

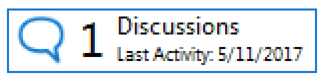
You can start a new discussion thread on a document or a WorkView object that others can view and respond to.

To start a new discussion thread:

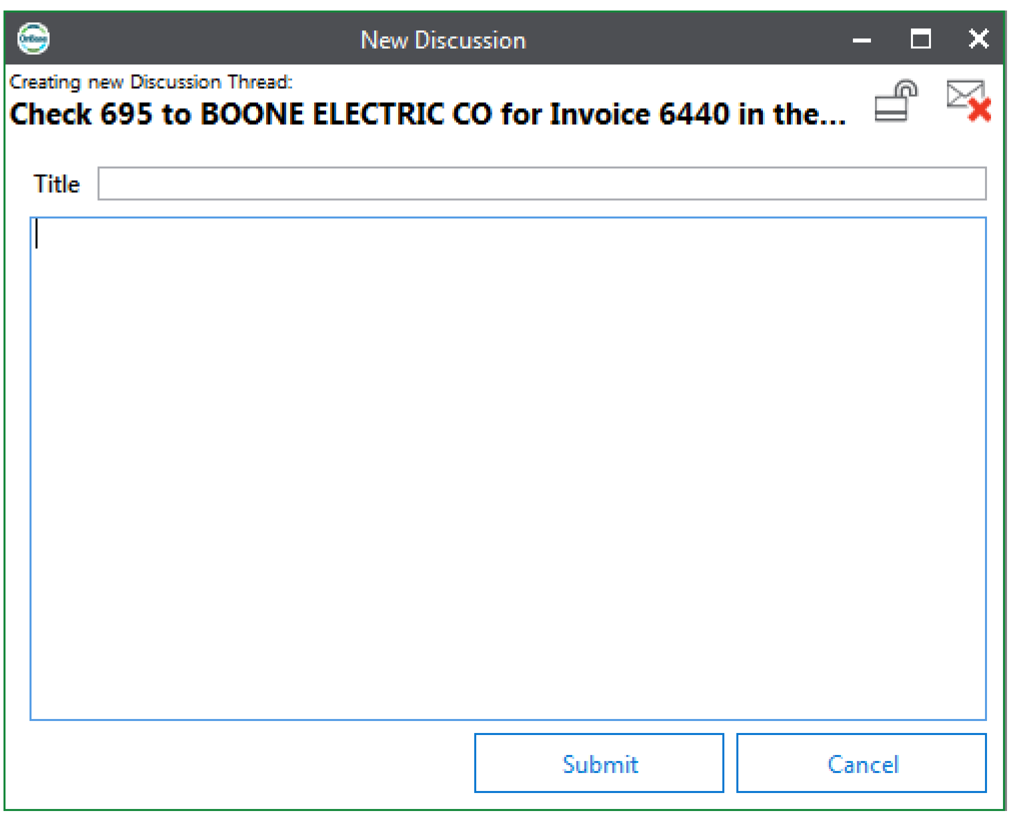
1. Open the **Discussions** pane by performing one of the following actions:
   - From a Document Search Results List or an open document, right-click on the document and select **Discussions**.
   - From the **Document** tab or the **WorkView** tab, click the **Discussions** button.



   - From an open document or WorkView object, select the **Discussions** indicator.

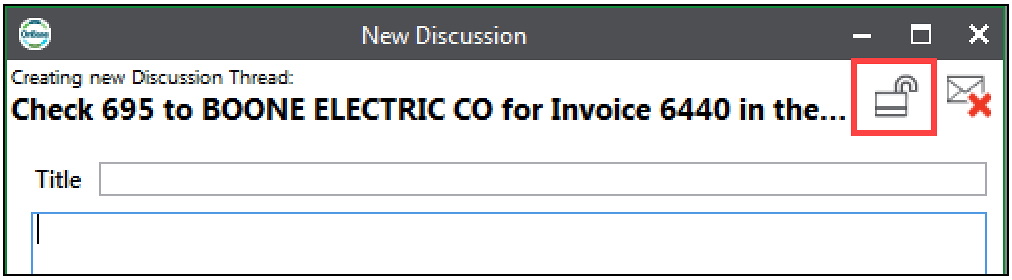


   All existing discussion threads are displayed in the **Discussions** pane.
2. Click **Start a Discussion**. The **New Discussion** window is displayed.

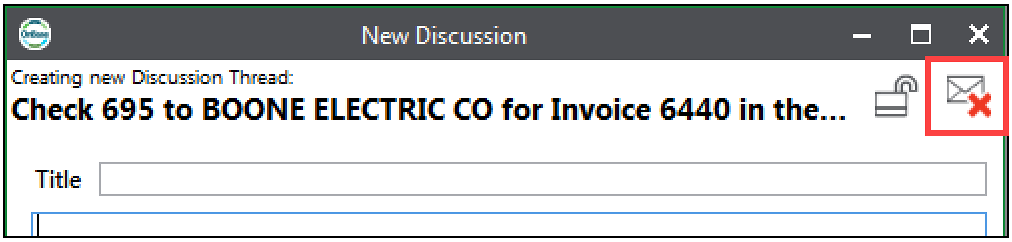


3. Enter a title for the discussion thread in the **Title** field.
4. Enter the text of the discussion thread in the empty field below the **Title** field.

5. Click the **Thread Security** button to configure security options for the discussion thread.



For more information on configuring security options for a discussion thread, see Assigning Specific Users to Discussion Threads on page 241.
6. Click the **Email Notifications** button to subscribe or unsubscribe from email notifications to this discussion thread.



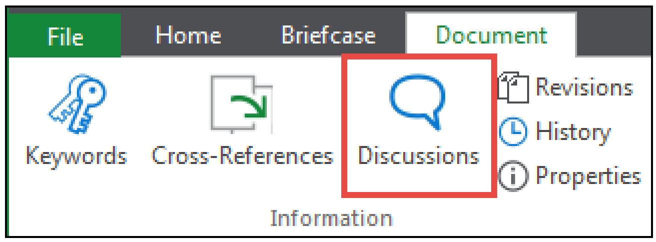
For more information on subscribing to discussion thread email notifications, see Subscribing to a Discussion Thread on page 244.
7. Click **Submit**. The discussion thread is added to the discussion thread list in the **Discussions** pane.

Assigning Specific Users to Discussion Threads

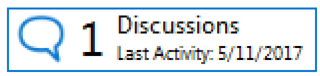
If your system is configured to allow thread level security, you can assign specific users to have access to discussion threads that you've created. This improves security when discussing sensitive information that should only be seen by certain users. Without any specific users configured with discussion thread access, all users can view a discussion thread.

To assign users to a discussion thread:

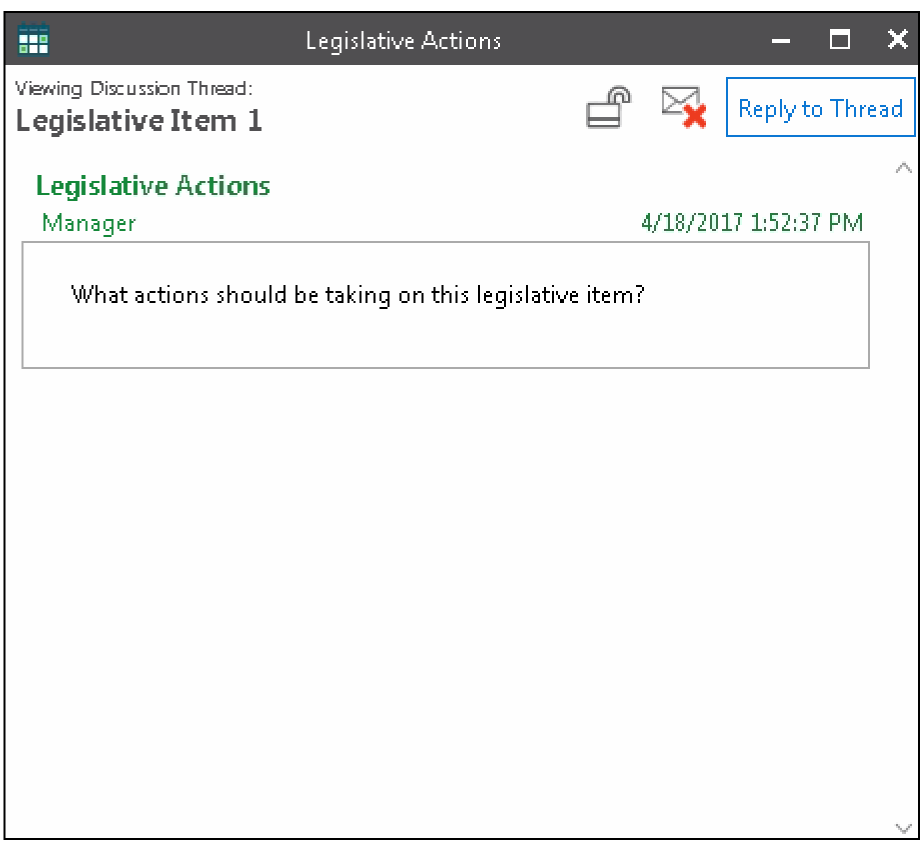
1. Open the **Discussions** pane by performing one of the following actions:
   - From a Document Search Results List or an open document, right-click on the document and select **Discussions**.
   - From the **Document** tab or the **WorkView** tab, click the **Discussions** button.



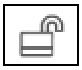
   - From an open document or WorkView object, select the **Discussions** indicator.



   All existing discussion threads are displayed in the **Discussions** pane.
2. Select the discussion thread you want to assign users to from the **Discussions** pane. The discussion thread dialog box is displayed.



3. Click the security button at the top of the discussion thread dialog box.
   - The unlocked security button indicates that security options are not configured and all users can view and reply to the selected discussion thread.

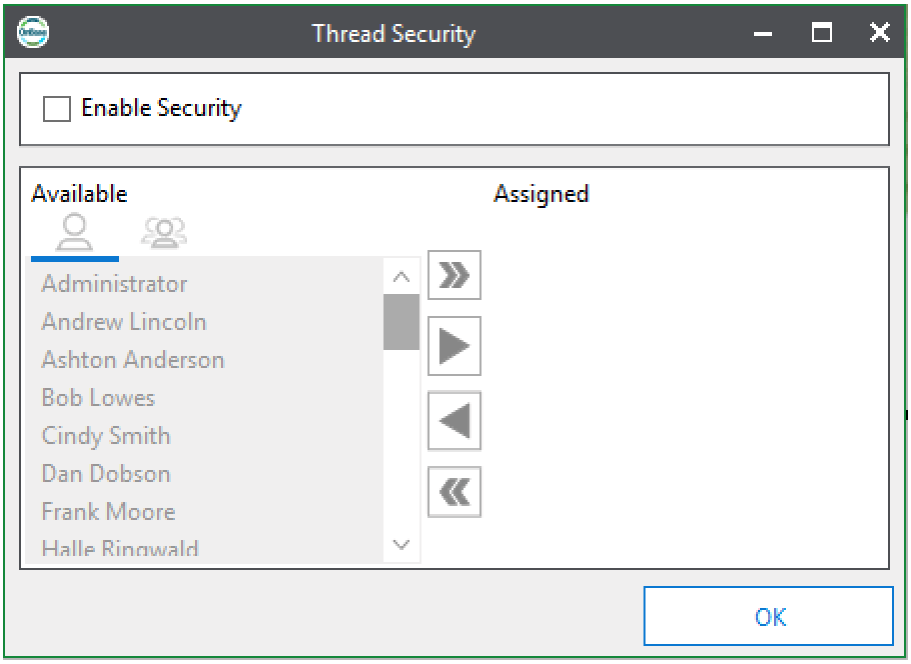
     

   - The locked security button indicates that security options are configured and only selected users can view and reply to the selected discussion thread.

Note: If your system is configured to disable thread level security, the security button is not displayed in the discussion thread dialog box.

The **Thread Security** dialog box is displayed.



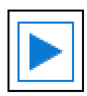
4. Select **Enable Security** to restrict access to this discussion thread. Only selected users can view and reply to the discussion thread.

5. From the **Available** column, select one of the following:

Option	Description
Users 	Assign individual users to the discussion thread.
User Groups 	Assign all users in the selected User Groups to the discussion thread.

Note: Depending on your system's configuration, the real name of the user may be displayed instead of the user name.

6. From the **Available** column, select the users or User Groups you want to be able to view and reply to the discussion thread.
7. Click the **Add Selected Items** button to add the selected users or User Groups to the **Assigned** column.

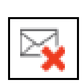


8. Click **OK**. A message is displayed that asks if you want to send a notification email to the added users.
9. Select **Yes** to send a notification email to the added users to inform them they were added to the discussion thread. Select **No** to not send a notification email to the added users.

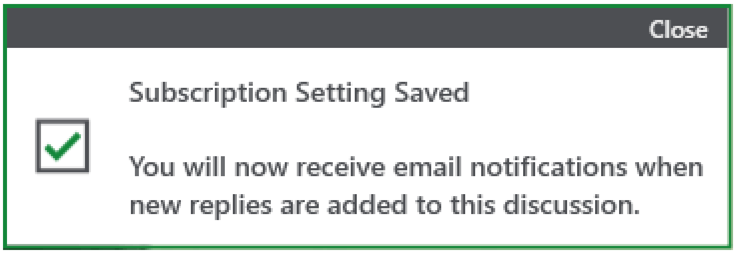
Subscribing to a Discussion Thread

The **Subscribe** button controls whether or not you receive e-mail notifications whenever a new post is added to a Discussion Thread. The appearance of the **Subscribe** button indicates whether or not you are currently receiving e-mail notifications.

The red X on the **Subscribe** button indicates that you are not receiving email notifications.



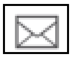
Click this button to begin receiving automatic e-mail notifications. A popup window will briefly appear to notify you of your new configuration:



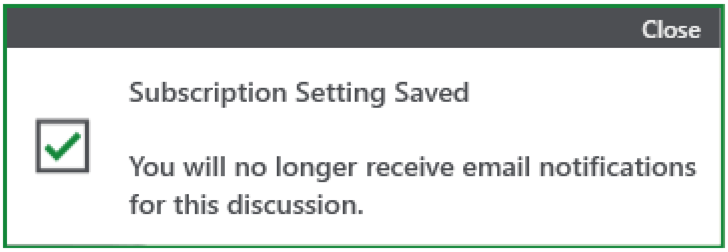
In addition, the **Subscription** icon will be displayed on the Discussion Thread.

This icon provides a quick visual indicator that you are receiving email notifications for a specific Discussion Thread.

The blank envelope on the **Subscribe** button indicates that you are receiving email notifications.



Click this button to stop receiving automatic email notifications. A popup window will briefly appear to notify you of your new configuration:



The **Subscribe** button can be found in two places:

- On an existing Discussion Thread, the **Subscribe** button appears on the main post of a Discussion Thread.
- When creating a new Discussion Thread, the **Subscribe** button appears on the **New Discussion** dialog box.