OnBase®

Foundation EP5

Mobile Access for iPad

Reference Guide

Includes:

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Copyright

Document Name .... Mobile Access for iPad

Department/Group .... Documentation

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OVERVIEW

OnBase Mobile Access for iPad is an OnBase mobile document management client developed specifically for iPad users. The OnBase Mobile Access for iPad app allows users to perform OnBase-specific tasks while working remotely with an active connection to the Internet.

You can use the OnBase Mobile Access for iPad app to search for and retrieve documents by using pre-configured search criteria, as well as perform Workflow tasks, create new forms, and upload new documents to OnBase. Before uploading new documents, you can crop photos taken with the device's camera as well as change image quality, color, and orientation.

Licensing

In order to use the functionality that OnBase Mobile Access for iPad provides, your OnBase database must be licensed for **Mobile Access for iPad**.

Additionally, **Workflow** and **Unity Forms** licensing is required in order for users to interact with Workflow and Unity Forms.

Definitions

The following sections define terms associated with OnBase Mobile Access for iPad that are used throughout the documentation.

App Menu

You can navigate between modules by using the **App Menu**. The app menu is displayed on the left side of the screen, and it lists all of the modules that you have access to. You can display the app menu by tapping the Menu icon located in the upper left corner of the screen:

Document

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

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

Document Search

The Document Search module allows you to conduct a pre-defined search for documents. The searches that are available to you are configured by your system administrator.

Document Type

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

Document Type Group

A Document Type Group represents a logical grouping of Document Types in the database.

Document Type Groups allow the system to organize, search for, and locate a document more efficiently.

Document Type Groups also provide a means of applying customized archival and security characteristics to a group of Document Types. For example, certain User Groups can be restricted from accessing a group of Document Types by configuring specific user group characteristics. Other characteristics can be configured to restrict the method of retrieval available to the Document Type, for example, from the connected database or a third-party system.

Document Type Groups contain Document Types that have common characteristics. For example, the Document Types of Health Records and Insurance Documents could be grouped together under the Document Type Group of Patient Information.

Keyword Types and Keyword Values

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

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

Keyword Types

Every Document Type has associated Keyword Types. For example, the **Check Images** Document Type has the **Account #**, **Check Serial #**, and **Amount** Keyword Types assigned to it.

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

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

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

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

Keyword Values

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

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

Keyword Data Sets

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

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

Cascading Data Sets

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

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

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

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

Note

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

A note has a maximum character limit of 250 bytes; however, the maximum number of characters that you can enter in a note varies depending on the type of database you are accessing, as well as your system locale and keyboard settings.

For example, if you are accessing an ANSI database and using an English display language in Windows, you can enter the maximum 250 characters in a note. However, when you access the same database using a multi-byte display language (e.g., Chinese, Japanese, or Korean), you are limited to 125 characters.

If you are accessing a Unicode database, it is possible for all display languages to enter the maximum 250 character amount; however, the 250 *byte* limit may be reached before you are able to enter all 250 characters.

Note: Contact your system administrator if you have questions or experience issues when entering characters in notes.

Upload

The Upload module allows you to upload and index new documents into OnBase by either selecting an image from the device’s photo gallery, or taking a photo using the device’s camera. After selecting a document type and an image, you assign keyword values which are then indexed along with the document into OnBase.

User

Each person using the system is known as a user. When a user logs on to the system, he or she supplies a unique user name and a password. This allows greater flexibility for system operation.

User Group

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

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

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

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About OnBase Mobile Applications

OnBase mobile applications are periodically updated to include new functionality and fix software defects. When these applications are updated, the updates are not automatically deployed to devices. Users must update the OnBase Mobile application on their devices through the appropriate application store/market. These updates do not require an OnBase upgrade.

However, some functionality in OnBase Mobile applications can only be used after an OnBase upgrade. For example, a certain version of an OnBase Mobile application may be compatible with multiple versions of OnBase. When using the most recent version of the OnBase Mobile application with an older version of OnBase, some newer functionality may not be available. When using the most recent version of the OnBase Mobile application with the most recent version of OnBase, the most current features and functionality will be available.

Requirements

OnBase Mobile Access for iPad requires the OnBase Mobile Applications Broker Server and OnBase Application Server.

For Mobile Applications Broker Server and Application Server requirements, see the **Installation Requirements** manual.

The following sections outline requirement information specific to Mobile Access for iPad in OnBase Foundation EP5.

General Requirements

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

- Databases Supported
- Operating System Requirements
- Server Browser Requirements
- Server and Core Services Hardware Requirements

iOS Version Requirements

Apple releases iOS version updates on a frequent basis. Hyland Software Development and Quality Assurance departments are dedicated to developing and testing against the latest versions of iOS supported by Apple.

As of the initial release of OnBase Foundation EP5, OnBase Mobile Access and Mobile Healthcare applications are supported on iOS version 14.4.2.

After the initial OnBase release, OnBase Mobile applications will continue to be supported on up to two of the latest major versions of iOS. A major version of iOS is defined by the first digit of the iOS build number, for example, iOS 14.

Testing of Major and Minor iOS Version Updates After the OnBase Release

When a new major version of iOS is officially released by Apple after the initial OnBase release, OnBase Mobile applications will be tested for compatibility with the new major version. Once testing has completed, OnBase Mobile applications will continue to be supported on the new major version of iOS and one version prior. Because of this, if a device cannot be upgraded to the iOS versions supported by OnBase Mobile applications, that device will not be supported.

When new minor versions of iOS are officially released, they will also be tested for compatibility with OnBase Mobile applications and an official communication regarding iOS version support will be released on the Hyland Community (https://www.onbase.com/community).

iOS Application Transport Security Requirements

In order to use OnBase Mobile applications for iOS, the Mobile Applications Broker Server must be configured to accept secure (HTTPS) connections, and the Mobile Applications Broker Server must meet the following requirements:

1. The server certificate must meet one of the following criteria:
   - Issued by a certificate authority (CA) whose root certificate is incorporated into the operating system
   - Issued by a trusted root CA and installed by the user or a system administrator
2. The negotiated TLS version must be TLS 1.2.
3. The negotiated TLS connection cipher suite must support forward secrecy (FS) and be one of the following:
   - TLS_ECDHE_ECDSA_WITH_AES_256_GCM_SHA384
   - TLS_ECDHE_ECDSA_WITH_AES_128_GCM_SHA256
   - TLS_ECDHE_ECDSA_WITH_AES_256_CBC_SHA384
   - TLS_ECDHE_ECDSA_WITH_AES_256_CBC_SHA
   - TLS_ECDHE_ECDSA_WITH_AES_128_CBC_SHA256
   - TLS_ECDHE_ECDSA_WITH_AES_128_CBC_SHA
   - TLS_ECDHE_RSA_WITH_AES_256_GCM_SHA384
   - TLS_ECDHE_RSA_WITH_AES_128_GCM_SHA256
   - TLS_ECDHE_RSA_WITH_AES_256_CBC_SHA384
   - TLS_ECDHE_RSA_WITH_AES_128_CBC_SHA256
   - TLS_ECDHE_RSA_WITH_AES_128_CBC_SHA

4. The leaf server certificate must be signed with one of the following types of keys:
   - Rivest-Shamir-Adleman (RSA) key with a length of at least 2048 bits
   - Elliptic-Curve Cryptography (ECC) key with a size of at least 256 bits
5. The leaf server certificate hashing algorithm must be SHA-2 with a digest length of at least 256 (SHA-256 or greater).

For additional information about iOS Application Transport Security, refer to the Mobile Access for iPad Product blog on the Hyland Community at https://www.onbase.com/community or contact your first line of support.

iOS Touch ID Requirements

The OnBase Mobile Access for iPad app supports the ability to log in to OnBase using Apple's Touch ID® authentication.

This allows users to log in to OnBase using a fingerprint instead of requiring them to manually enter their credentials each time.

In order to use this functionality, the iOS device must support Touch ID and Touch ID must be enabled in the iOS Settings app. Touch ID must also be enabled in the OnBase app after installation.

Refer to Apple's documentation for additional information about Touch ID.

Mobile Device Certificate Requirements

When the Mobile Applications Broker Server is configured for secure HTTPS connections, all intermediate certificates in the Mobile Applications Broker Server's certificate chain must also be installed on each device connecting to the server.

Licensing Requirements

See Licensing on page 1 for licensing requirements.

Upgrade Considerations

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

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

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

The following should be noted when upgrading a solution that uses OnBase Mobile applications:

- Review the operating system requirements for the OnBase Mobile application to verify that the version of the OnBase app you are upgrading to is supported on the operating system installed on the device.

Upgrading from prior OnBase versions to OnBase 15 or greater — Beginning with OnBase 15, version-specific OnBase Mobile applications were released. Before the release of OnBase 15, the available OnBase Mobile applications were not tied to specific versions of OnBase. It is important to note the following regarding version-specific OnBase Mobile applications:

- If upgrading from a legacy OnBase Mobile application to a version-specific OnBase Mobile application, the Mobile Applications Broker must be configured to allow https:// connections. The version-specific mobile applications require an https:// connection to be used.
- When upgrading an OnBase solution that includes version-specific OnBase Mobile applications, ensure that the version of the OnBase Mobile application matches the version of the OnBase Application Server and Mobile Applications Broker Server. The version of the Application Server, Mobile Applications Broker Server, and OnBase Mobile application must all match.

Upgrading Mobile Access for Windows to OnBase 18 — Beginning in OnBase 18, the use of the Mobile Briefcase module in the OnBase Mobile Access for Windows app is no longer supported.

If you are using Mobile Briefcase in the OnBase Mobile Access for Windows app, contact your first line of support to discuss options for upgrading to OnBase Foundation EP5.

If you upgrade to OnBase Foundation EP5, you must use Mobile Briefcase in the OnBase Mobile Access for iPad app to fulfill your needs. The OnBase Mobile Access for iPad app requires a separate license.

Upgrading to OnBase Foundation EP3 or EP5 — When upgrading to OnBase Foundation EP3 or Foundation EP5, the following functionality is not available or supported in Mobile Access apps:

- Mobile Briefcase module
- OnBase IdP login

Additionally, the OnBase Mobile Access for Windows app is not available in OnBase Foundation.

Installation

OnBase Mobile Access for iPad is installed on devices by downloading it from the Apple® App Store®.

Search the App Store for **OnBase Mobile** and download the version of the app that corresponds with your installed version of OnBase. For example, if your organization uses OnBase Foundation EP5, download the **OnBase Mobile Foundation EP5** version of the app.

Troubleshooting

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

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

The position shift may occur in the following instances:

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

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

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

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

A position shift can be corrected through the following methods:

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

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

Contacting Support

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

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

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

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Overview

This chapter contains topics that describe additional configuration steps that must be taken into consideration when configuring your OnBase solution for Mobile Access for iPad.

Custom URL Configuration

You can manually create custom URLs which allow users to access specific documents and other module functionality within OnBase Mobile Access for iPad. Users can simply access the URL from their mobile devices, and have the requested document or module functionality displayed to them within the OnBase app.

These URLs follow a simple format, allowing you to easily specify an action and additional parameters to determine what to display to a user. See the following example:

```
onbasemobile://[action]?[required_parameter]&[additional_parameter]
```

Note: All URL parameters and values must be lowercase.

Not all URLs may require additional parameters, however, if additional parameters are used, they are separated by an ampersand (**&**).

Note: Certain module functionality is only accessible with appropriate licensing and appropriate user privileges and rights.

Caution: All of the values specified within custom URLs are transmitted in plain text, therefore, use caution when configuring these URLs to ensure that any sensitive data is not contained within a URL string.

For more information about the available actions and parameters that can be used, see the following sections:

- View Document URLs on page 15
- Workflow Module URLs on page 15
- New Form Module URLs on page 16
- Upload Module URLs on page 16

View Document URLs

You can create a URL to allow users to open a specific document by its document ID. In the following example, the URL will open OnBase Mobile Access for iPad and display the document with a document ID of 101.

```
onbasemobile://view?docid=101
```

Note: All URL parameters and values must be lowercase.

The **view** parameter is used to open a single document within the OnBase Mobile Access for iPad app, and the **docid** parameter specifies the exact document to open based on its document ID.

Workflow Module URLs

Workflow URLs can be used to open the Workflow module, open a specific Workflow queue, or even open a specific document in a specific Workflow queue. The following base URL will allow a user to open the Workflow module within OnBase.

```
onbasemobile://workflow?
```

The following additional parameters can be specified:

Parameter	Description
queueid	The **queueid** parameter is used to specify a Workflow queue to open. This parameter is optional.
docid	The **docid** parameter is used to specify the exact document to open within the queue, based on the document ID. This parameter is optional. **Note:** This parameter can only be used if a **queueid** is specified. The **docid** parameter will be ignored unless the **queueid** is also specified.

The following URL shows an example which will display a document that has a document ID of 752 in the Workflow queue that has a queue ID of 102.

```
onbasemobile://workflow?queueid=102&docid=752
```

Note: All URL parameters and values must be lowercase.

New Form Module URLs

New Form URLs can be used to open the New Form module, or create a new Unity Form or E-Form to be filled out by a user. The following base URL will allow a user to open the New Form module within OnBase.

`onbasemobile://newform?`

The following additional parameters can be specified:

Parameter	Description
formid	The **formid** parameter is used to specify the form ID of the form to display. For E-Forms, use the E-Form's document type ID. For Unity Forms, use the Unity Form's form template ID. This parameter is optional.
formtype	The **formtype** parameter is used to specify the type of form that corresponds to the **formid**. The acceptable values are **eform** or **unity**. This parameter is required if a **formid** is specified.

The following URL shows an example which will open a new Unity Form for a user to fill out.

`onbasemobile://newform?formid=109&formtype=unity`

Note: All URL parameters and values must be lowercase.

Upload Module URLs

Document Upload URLs can be used to open the Upload module for a user to upload a document to OnBase. Additional parameters can be specified to automatically select the appropriate document type, as well as populate keyword values for keywords on the document to be uploaded. The following base URL will allow a user to open the Upload module within OnBase.

`onbasemobile://upload?`

The following additional parameters can be specified:

Parameter	Description
dtid	The **dtid** parameter is used to specify which document type the document should be uploaded to. This parameter is optional.

Parameter	Description
kw	The **kw** parameter is used to prepopulate keyword fields with values on the document being uploaded. This parameter is optional. The following format is used for populating keyword values: `kw[keyword_type_id]=[keyword_value]` The format for specifying a keyword value varies based on the type of keyword being used, for example: numeric, alphanumeric, date. For information on formatting different keyword type values, see Keyword Type Value Formatting on page 17. **Note:** A **dtid** must be specified when using the **kw** parameter.

The following URL shows an example which will allow a user to upload a document to a document type of 101. In the Upload keyword panel, keyword type 1098 will be populated with a value of John.

```
onbasemobile://upload?dtid=101&kw1098=John
```

To specify multiple keyword types and keyword type values, add another keyword parameter and separate each with an ampersand (**&**):

```
onbasemobile://upload?dtid=101&kw1098=John&kw1099=Smith
```

Note: All URL parameters and values must be lowercase.

Keyword Type Value Formatting

Keyword type values must follow certain formatting guidelines to ensure the keyword values are properly passed into OnBase. See the following additional sections for information.

- Formatting Special or Reserved Characters on page 17
- Formatting Dates and Times on page 18

Formatting Special or Reserved Characters

When used as part of a keyword value, special or reserved characters must be percent-encoded in order to correctly pass the value into the keyword panel during upload. If these characters are left unencoded, OnBase will fail to pass the information into the keyword field.

In the following example, the keyword parameter in the URL contains a foreign character which must be percent-encoded:

```
onbasemobile://upload?dtid=101&kw1098=José
```

In this example, the foreign character in the keyword parameter has been percent-encoded:

```
onbasemobile://upload?dtid=101&kw1098=Jos%C3%A9
```


Formatting Dates and Times

Date keywords must be entered in the following format:

yyyy-MM-dd

Therefore, if you want to enter a date of **February 27th, 2015**, the formatted date would be **2015-02-27** and the percent-encoded date value would be **2015%2D02%2D27**.

Date time keywords must be entered in the following format:

yyyy-MM-dd HH:mm:ss

The time must be entered using the 24 hour clock. Therefore, if you want to enter a date and time of **February 27th, 2015 02:30:55 PM**, the formatted date would be **2015-02-27 14:30:55** and the percent-encoded date and time value would be **2015%2D02%2D27%2014%3A30%3A55**.

Document Search / Custom Queries Configuration

The following configuration items for Custom Queries apply to the OnBase Mobile Access for iPad app:

- Custom Queries with the **Mobile Device Accessible** option selected are displayed as Document Searches in the OnBase Mobile Access for iPad interface. Only Custom Queries configured with the Mobile Device Accessible check box selected are available for use with OnBase Mobile Access for iPad.
- Custom Queries configured with the **Workflow Filter** check box selected can be used as Workflow queue filters in OnBase Mobile Access for iPad. Additionally, if Display Columns are configured for the Custom Query, users can sort filtered Workflow queues based on the available display columns.

Note: Folder Type Custom Queries are not supported in OnBase Mobile Access for iPad.

Note: HTML Custom Queries being used in Mobile Access for iPad require any externally-linked resources to be accessible by a web server. This is required even if the device is connected to the same network where the linked resources are located.

For more information about configuring these options, see the **System Administration** documentation.

Document Type Configuration

The following sections describe some specific Document Type configuration options that can be utilized by OnBase Mobile Access for iPad.

Document Type Overlay Information

Documents that are configured to display Document Type overlays will display with the overlay applied in OnBase Mobile Access for iPad if the overlay setting is set to **Default On** or **Required**.

Geolocation Information

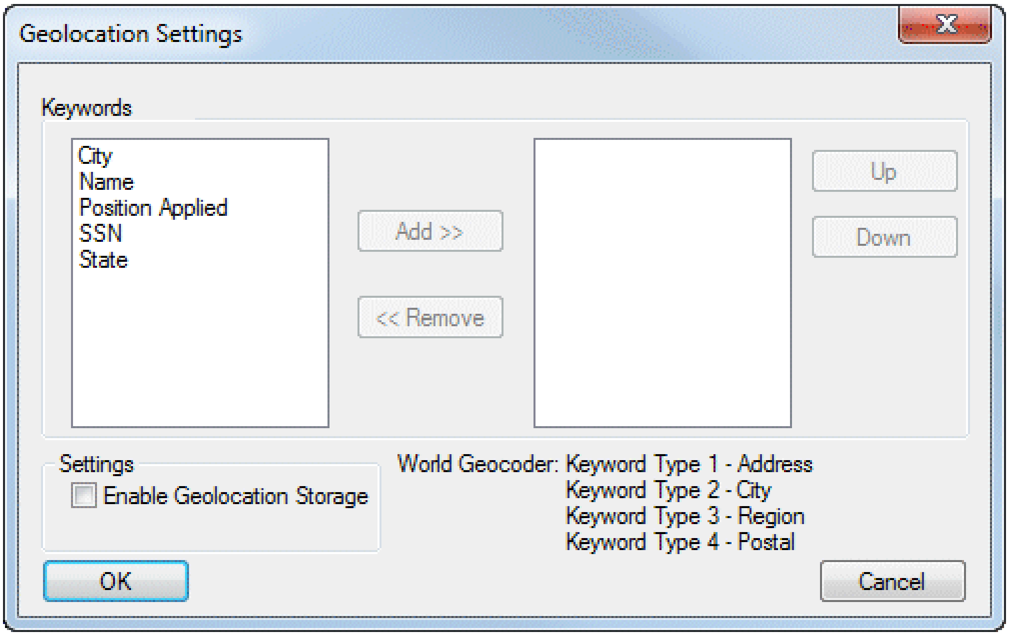
Document Types can be configured to store geolocation information when users create new documents in the OnBase Mobile Access for iPad app. In order to capture geolocation information from a mobile device, the OnBase application must have permission to use the device's location within the device's internal settings. Geolocation information storage is configured at the Document Type level in the Configuration client.

When geolocation information storage is configured for the Document Types that are used in OnBase Mobile Access for iPad, the following information is stored in the database for documents that users create from the New Form or Upload modules:

- Latitude
- Longitude
- Latitude/Longitude Accuracy
- Altitude Accuracy
- Heading

To configure document types to store geolocation information, perform the following steps:

1. In the OnBase Configuration module, navigate to **Document | Document Types**.
   The **Document Types** window is displayed.
2. Select the Document Type to configure.
3. Click the **Geolocation** button. The **Geolocation Settings** dialog box is displayed:



4. Select the **Enable Geolocation Storage** check box.

   This is the only setting on the screen that needs to be changed in order to enable the storing of geolocation information for the selected Document Type in OnBase Mobile.
5. Click **OK**.

Mobile Applications Broker Server Configuration

This section contains information about settings in the Mobile Applications Broker Server's Web.config file that affect functionality in the OnBase Mobile Access for iPad application.

For additional information on installing and configuring the Mobile Applications Broker Server, see the **Mobile Applications Broker Server** module reference guide.

Security Settings

enableSslSupport

The OnBase Mobile Access for iPad app can only connect to a Mobile Applications Broker Server that is configured to use secure (HTTPS) connections.

The **enableSslSupport** setting controls whether or not the Mobile Applications Broker Server accepts HTTP or HTTPS requests.

When set to **true**, an HTTPS connection is used. For example:

```
https://[broker server]/MobileBroker
```

When set to **false**, an HTTP connection is used. For example:

```
http://[broker server]/MobileBroker
```

Note: When the Mobile Applications Broker Server is configured to use secure HTTPS connections, all intermediate certificates in the Mobile Applications Broker Server's certificate chain must also be installed on each device connecting to the server.

Note: Starting January 1, 2017, Apple requires iOS applications to support **Application Transport Security (ATS)**. ATS requires iOS applications to connect to Web services using a secure HTTPS connection. This requirement extends to OnBase Mobile applications.

For more information about ATS and what is required for the Mobile Applications Broker Server, see iOS Application Transport Security Requirements on page 8.

Document Upload Settings

In order for users to upload documents with file sizes larger than 30 million bytes (about 28.6 MB) in the OnBase Mobile Access for iPad application, the **maxAllowedContentLength** value in the Mobile Applications Broker Server Web.config file must be increased to accommodate larger file sizes. For information about updating this setting, see maxAllowedContentLength on page 21.

Note: Depending on how you update the **maxAllowedContentLength** value, you may also need to update the **maxRequestLength** value. See maxRequestLength on page 22 for additional information.

maxAllowedContentLength

The **maxAllowedContentLength** setting is specific to file uploads in IIS 7.0 and later. This setting allows the Mobile Applications Broker Server to override an IIS security feature that prohibits requests over 30 million bytes (about 28.6 MB). This request filtering feature is enabled by default in IIS 7.0 and later. To allow users to upload files that exceed the default request limit, you must complete the steps below, keeping the following in mind:

- The **maxAllowedContentLength** must be updated in both the Mobile Applications Broker Server and the Application Server's Web.config files.
- The Application Server's setting may need to be larger than the Mobile Applications Broker Server's because the request sent to the Application Server is larger than the request sent to the Mobile Applications Broker Server. See the following point.
- Request size does not mean file size. When a file is sent from the OnBase Mobile Access for iPad app to the Mobile Applications Broker Server to the Application Server, the request size increases due to encoding. The increase amount varies depending on whether the Mobile Applications Broker Server is using SOAP to communicate with the Application Server. Requests using SOAP are larger than requests sent using Remoting.
- The **maxAllowedContentLength** setting doesn't override the **maxRequestLength** setting, which specifies the Mobile Applications Broker Server's maximum size for a file upload. If you change the **maxAllowedContentLength** value, you may also need to change the **maxRequestLength** value to accommodate larger files. The **maxAllowedContentLength** should exceed the **maxRequestLength**.

Follow these steps to increase the size of requests that the Mobile Applications Broker Server and Application Server can handle.

1. In the Mobile Applications Broker Server's Web.config file, locate the **security** element, which contains the **maxAllowedContentLength** setting. Change the **maxAllowedContentLength** to the appropriate value, in bytes.
2. Check the **maxRequestLength** value to ensure that it accommodates the intended file size and is less than the **maxAllowedContentLength** value.
3. Perform the same steps in the Application Server's Web.config file.

maxRequestLength

The **maxRequestLength** setting controls the maximum request size allowed for a file upload. This value is represented in kilobytes, and the default value is 20480 KB (20 MB). If users need to upload files larger than 20480 KB, increase the **maxRequestLength** value. This setting is found in the **httpRuntime** element in the Mobile Applications Broker Server's Web.config file.

- The **maxRequestLength** setting specifies the maximum request size, not the maximum file size. When a file is sent from the Mobile Applications Broker Server to the Application Server, the request size is larger than the file size due to encoding. The Application Server's default **maxRequestLength** value is 30000 KB.

Custom Query / Document Search Settings

maxCustomQueryResults

The **maxCustomQueryResults** setting controls the maximum number of documents that are returned to users when executing a custom query. The default value is 1000.

Workflow Queue Settings

maxQueueDocuments

The **maxQueueDocuments** setting controls the maximum number of documents that are returned to users when viewing Workflow queue contents. The default value is 100.

Note: The **maxQueueDocuments** setting only applies to Workflow queue documents. Additional licensing is required in order to use Workflow.

Managing App Configuration Settings

The OnBase Mobile Access for iPad app supports deployment of managed app configuration settings to devices when using third-party Mobile Device Management (MDM) software. This functionality is vendor-neutral and is limited to the MDM software vendor's capability to push managed app configuration settings to individual devices. Some MDM software providers may also provide the option to deploy the OnBase app directly to a user's device.

This functionality is limited based on your MDM software, therefore, a comprehensive list of supported MDM vendors is not available. Work with your MDM software vendor to determine if your MDM software is able to push app configuration settings to individual devices.

The following settings can be included as app configuration settings to be pushed to each user’s device. Not all settings are required to be included.

Configuration Setting	Description
brokerURL	The URL for the Mobile Applications Broker Server, for example: `https://[mobile_broker_server]/MobileBroker`
brokerUsername	The OnBase user name to be pre-populated in the **User Name** field on the login screen.
rememberUsername	Acceptable values are **true**, **false**, or the setting can be left blank. If this is set to **true**, the **Remember User Name** option on the app’s settings screen is always enabled and the user cannot disable the setting. If this is set to **false**, the user name will not be remembered and the user cannot enable the setting. Leave this setting blank to give the user the option to select whether or not the user name is remembered.
allowEditURL	Acceptable values are **true** or **false**. If this is set to **true**, the user can modify the URL for the Mobile Applications Broker Server on the app’s settings screen. If this is set to **false**, the field is read-only and the user cannot modify the URL.
allowEditUsername	Acceptable values are **true** or **false**. If this is set to **true**, the user is able to modify the user name in the User Name field on the login screen. If this is set to **false**, the field is read-only and the user cannot modify the user name.

Configuration Setting	Description
allowEditBiometricEnabled	Acceptable values are **true** or **false**. If this is set to **true**, the Touch ID setting on the app's settings screen is enabled. The user can modify this setting. The following must be considered when enabling this setting: • When **allowEditBiometricEnabled** is **true**, the **rememberUsername** setting must also be **true**. This is because on each device, Touch ID can only be associated with one OnBase user at a time, requiring the user name to be remembered. • When **allowEditUsername** is **true**, a **Switch Accounts** option is displayed on the login screen to allow another OnBase user to temporarily log in if Touch ID is already enabled for a different user. • If **allowEditUsername** is **false**, ensure that the **brokerUsername** setting is configured to pre-populate the user name on the login screen. Users will not be able to edit the user name associated with Touch ID. If this is set to **false**, the Touch ID setting is disabled and the user cannot modify this setting. For general information about using Touch ID, refer to Apple's documentation.
logProfilingData	Acceptable values are **true** or **false**. If this is set to **true**, the **Log profiling data** option on the app's settings screen is always enabled and the user cannot disable the setting. If this is set to **false**, the option is disabled and the user cannot enable the setting. **Note:** Refer to the Troubleshooting topic in the Installation chapter of this module reference guide for additional information about this setting.

The following shows an example configuration, however, note that the manner in which these settings are configured may vary depending on the MDM software being used, and therefore may not exactly match the example shown.

```
<dict>
<key>brokerURL</key>
<string>https://mobile_broker_server/MobileBroker</string>

<key>brokerUsername</key>
<string>USERNAME</string>

<key>allowEditURL</key>
<false/>
```

```
<key>allowEditUsername</key>
<false/>

<key>rememberUsername</key>
<true/>

<key>alwaysSaveNewCasesOffline</key>
<true/>

<key>logProfilingData</key>
<false/>

</dict>
```

Notes and Annotations

If the database that users will be connecting to has Unicode collation, a character count is displayed to users when they are creating or editing note text. The character count is not displayed to users connecting to a database with ANSI collation.

Supported File Types

Documents with the following file types can be viewed in OnBase Mobile Access for iPad.

File Format	Behavior
E-Form	E-Form, Virtual E-Form, and HTML documents can be viewed. You can enter information into E-Forms in the same way that you would when using a desktop-based OnBase client. When you tap a field that allows you to enter comments, the device's keyboard is displayed. E-Forms licensing is required to view and enter information in E-Forms.
Image	Rendered as read-only.
OLE	Rendered as read-only. The following OLE document types are supported for viewing: • Excel (.xls, .xlsx) • Word (.doc, .docx) • PowerPoint (.ppt, .pptx) • PDF (.pdf) **Note:** Some functionality (for example, password protection for PDF documents) may not be available.
Text (.txt)	Rendered as read-only.
Rich Text (.rtf)	Rendered as read-only.

File Format	Behavior
Unity Form	Users can enter information in Unity Forms in the same way that they would by using a desktop-based OnBase client. Unity Forms licensing is required to view and enter information in Unity Forms.

If a user attempts to view a document with an unsupported file type, then the user will receive the following message:

- **Sorry, this content cannot be viewed on this device.**

User Group Configuration

The following sections contain information regarding user group configuration to allow users to perform specific tasks and access modules within OnBase Mobile Access for iPad.

Client Access Privileges

For users to log on to OnBase Mobile Access for iPad, the user group that the user belongs to must be granted the **Mobile Client** privilege from within the Configuration module.

Access to modules in the Mobile Access for iPad app is determined based on a combination of licenses, product rights, and privileges. In order for users to log in to the app, they must have access to at least one module.

See the following topics for information on necessary privileges:

- Document Search / Custom Queries Privileges on page 26
- New Form Creation Privileges on page 26
- Document Upload Privileges on page 27
- Workflow Document Security on page 27

Document Search / Custom Queries Privileges

For users to access Custom Queries in the Document Search module, the user group must be assigned to Custom Queries configured with the **Mobile Device Accessible** option.

Users must also have permission to access the necessary Document Types.

New Form Creation Privileges

For users to create forms, they must be assigned the **Create** Document privilege within OnBase Configuration, as well as be assigned the **HTML Forms** product right.

Users must also have permission to access the necessary form Document Types.

Document Upload Privileges

Users must have the following User Group-level privileges in order to access the **Upload** module and upload new documents to OnBase from the Mobile Access for iPad application:

- The **Create** Document privilege
- The **Import** Client Feature privilege
- User groups must have rights to at least one document type, or they must have document type override privileges.
  Refer to the System Administration module reference guide or help file for information about override privileges.

Additionally, if users are to upload photos via the device's camera, ensure that the camera on the user's device is enabled and accessible. Consult the documentation for your device or mobile device operating system for information about enabling or disabling the device's camera.

Workflow Document Security

Access to Workflow in OnBase Mobile Access for iPad is accomplished by a combination of assignments made at the Document Type, life cycle, and work queue level. Specifically:

- Document Types must be configured for use in a specific life cycle.

  In the Configuration module, select **Document | Document Types**, then select the desired Document Type and select **Life Cycles**. Assign the desired life cycles at the **Life Cycles** dialog box.
- Users must be granted rights to a specific life cycle, as well as each queue within that life cycle, in order to view the metadata of documents within those queues.

  In the Configuration module, select **Users | User Groups/Rights**. Select the desired User Group and select **Workflow**. Assign the desired life cycles and queues at the **Assigning Workflow for <user group>** dialog box.

- Users must be granted the **Retrieve/View** privilege, either as a User Group privilege or as an override privilege. If this privilege is not granted (or in the case of override privileges, overridden), users will not be able to view the metadata of documents in OnBase Mobile Access for iPad. For more information on configuring User Groups, see the System Administration documentation.

Caution: The ability to view the metadata of documents in a life cycle is controlled at the queue level. If a user has rights to a Workflow queue that has been configured with a task list that is **Available for Mobile Devices**, they will also have rights to view all the documents in that queue by default, regardless of their security rights (i.e., Document Type rights). This includes related documents.

Caution: The ability to modify a document in a life cycle is controlled at the queue level. If a user has rights to a Workflow queue, he or she will also have rights to modify all documents in that queue by default, regardless of his or her **Modify** privilege setting, including related documents. Administrators should be aware that Workflow automatically grants the **Modify** privilege to the user for any documents that are in his/her queue. As a result, care should be taken to only present documents which the user should be allowed to modify. The exception to this is E-Forms (which have configurable overrides).

System Interaction

The OnBase Mobile Access for iPad app interacts with other OnBase functionality. See the following topics for information:

- Authentication on page 28
- Configuration Module on page 29
- E-Forms on page 29
- Encrypted Alpha Keywords on page 30
- Signature Pad Interface on page 30
- Unity Forms on page 31
- Workflow on page 31

Authentication

See the following topics for system interaction regarding authentication methods:

- Active Directory Authentication on page 29
- AD FS Authentication on page 29

Active Directory Authentication

OnBase Mobile Access for iPad supports interactive login using Active Directory authentication. In order for users to log in using Active Directory credentials, a value for the **domain** setting must be specified in the Web.config file for the Mobile Applications Broker Server. See the **Mobile Applications Broker Server** module reference guide for information on configuring this setting.

Additional configuration is also needed. For information on configuring Active Directory authentication, see the **Legacy Authentication Methods** documentation.

AD FS Authentication

OnBase Mobile Access for iPad supports interactive login using Active Directory Federation Services (AD FS) authentication. When AD FS authentication is configured and enabled, users can enter their Active Directory credentials upon logging in to the mobile application. The login credentials are then verified on the Application Server being used for AD FS Authentication. Configuration for allowing users to log in using AD FS credentials is performed on the Application Server.

For information on configuring the Application Server to allow AD FS authentication for OnBase mobile applications, see the **Legacy Authentication Methods** documentation.

Configuration Module

The following additional functionality configured in the OnBase Configuration module provides corresponding functionality to OnBase Mobile Access for iPad.

Login Banners

Login banners that are configured with the **Mobile** option selected are displayed as announcements to users after logging in to the OnBase Mobile Access for iPad app.

See the **System Administration** documentation for information about configuring this functionality.

E-Forms

Users can create and submit E-Forms in the Mobile Access for iPad app. For information on specific design considerations for E-Forms in OnBase Mobile applications, see the **E-Forms** module reference guide.

Encrypted Alpha Keywords

Users with the **Access Restricted Keywords** and **Access Security Masked Keywords** privileges assigned can view encrypted Keyword Values on documents.

Note: The Encrypted Alpha Keywords license is required.

For information on configuring security masked keywords, see the **Encrypted Alpha Keywords** module reference guide.

Signature Pad Interface

If signatures are configured using Signature Administration in the Unity Client, users can also sign documents in the Mobile Access for iPad app. When a user accesses a document that contains a signature field, the user can sign the field on the document using a stylus or finger on the device's touch screen.

Additional licenses and privileges are required for using and configuring signatures. For information on configuring signatures, see the **Signature Pad Interface (TWAIN)** module reference guide.

User Group and Document Type requirements for signatures in Mobile Access for iPad are described in User Group and Document Type Requirements for Signatures on page 30.

Configuration limitations for signatures in Mobile Access for iPad are described in Configuration Limitations for Signatures in Mobile Access for iPad on page 31.

User Group and Document Type Requirements for Signatures

In order to use signature functionality in Mobile Access for iPad, the following User Group and Document Type settings must be configured in the Configuration module:

- The User Group for users signing documents in Mobile Access for iPad must have **Modify** rights assigned.

  If users will be signing revisable Document Types, the User Group must also have the **Create Revisions** privilege assigned.
- Document Types used for signing must have Signature Types configured.
- Document Types must be an **Image** or **PDF** File Format. Other file formats are not supported for signing in Mobile Access for iPad.

Note: To sign PDF Documents, the PDF Framework license is required.

- Document Types must be configured with the **Allow Redaction Bitmaps** option enabled.

- Document Types must be configured to **Allow Multiple Revisions**, or be configured as **Non Revisable** with the **Create new document** option selected.

  If a Document Type is configured as **Non Revisable** with the **Create new document** option selected, when the user saves the signature, a new document is created with the signature applied to the new document.

Caution: When a document from a non-revisable Document Type is signed, existing notes and annotations from the original document are not copied to the newly-signed document. If the **Prompt to overwrite or create new document** revision setting is selected for the Document Type, the original document and its notes are automatically purged when a signature is saved on it.

Additional licensing and configuration is required for revisable document types. For information on configuring revisable Document Types, see the **EDM Services** module reference guide.

Configuration Limitations for Signatures in Mobile Access for iPad

Signatures used in Mobile Access for iPad are configured in the Signature Administration interface in the Unity Client. For information on configuring signatures in the Unity Client, see the **Signature Pad Interface (TWAIN)** module reference guide.

When configuring Signature Options for Signature Types in the Signature Administration interface, the following options are not supported:

- **Automatically save document after signature has been applied**
- **Use stored signature if present**

Users must manually sign signature fields using the device's touch screen and they must complete the signing process by tapping **Finish Signing**.

Additionally, Signature Types must be configured with the following Page Option selected in the Signature Administration interface:

- **Apply to Specific Page**

Signatures configured with either the **Apply to Current Page** or **Apply to All Pages** options are not displayed on documents viewed in the Mobile Access for iPad app.

Unity Forms

Unity Forms are configured in the Unity Forms Designer. For information on Unity Forms configuration, see the **Unity Forms** module reference guide or help file.

Workflow

Workflow for OnBase Mobile Access for iPad is configured in OnBase Studio. For information on Workflow configuration, see the **Workflow** module reference guide or help file.

Additional Workflow configuration considerations for the OnBase Mobile Access for iPad application are contained in the following sections.

Actions and Rules

The following Workflow actions and rules that require user interaction are supported for use with Mobile Access for iPad, and are configured in OnBase Studio:

- Create Note

Note: During configuration, only the **Current Document** is supported as the Target.

- Create New Form
- Create Unity Form
- Display E-Form for Input
- Display HTML Form

Note: During configuration, only the **Current Document** is supported as the Target.

- Display Unity Form for Input
- Display Message Box
- Assign to User
- Remove User Assignment
- Prompt User with Question Box

Note: If a task list is executed that contains user interaction from unsupported Workflow actions or rules, the task list will continue execution without displaying user interaction.

Note: Password protected Workflow actions are supported for use with OnBase Mobile Access for iPad.

Ad Hoc Tasks

Queues containing an ad hoc task list configured with the **Available for Mobile Devices** option selected are available for use with OnBase Mobile Access for iPad. Other Workflow queues are not available for use with OnBase Mobile Access for iPad.

Life Cycles

Unity Life Cycles that route documents are supported in OnBase Mobile Access for iPad. Other Unity Life Cycles are not supported.

Queues

Exclusive Document Viewing and Auto-Feed queues are not supported for use with OnBase Mobile Access for iPad.

Users with additional privileges have access to functionality that allows them to view other users' documents in load-balanced queues or queues that support ownership. To access this functionality, the user or user group must be granted the **See Other User's Documents** privilege, or be granted **Workflow Administrative Processing** privileges.

Filters

Filter options can be configured in OnBase Studio for Custom Queries that are used as filters for Workflow queues.

Note: The **Display HTML Form used by Filter** option is not supported in Mobile Access for iPad.

OnBase®
Foundation EP5

Mobile Access for iPad

User Guide

Foundation EP5

Overview

OnBase Mobile Access for iPad is an OnBase mobile document management client developed specifically for iPad users. The OnBase Mobile Access for iPad app allows users to perform OnBase-specific tasks while working remotely with an active connection to the Internet.

You can use the OnBase Mobile Access for iPad app to search for and retrieve documents by using pre-configured search criteria, as well as perform Workflow tasks, create new forms, and upload new documents to OnBase. Before uploading new documents, you can crop photos taken with the device's camera as well as change image quality, color, and orientation.

Caution: This application can transfer a large amount of data. It is strongly recommended that each device using this module has a large or unlimited data plan.

For basic information on using the OnBase Mobile Access for iPad app, see the following topics:

- Opening The OnBase Mobile Access for iPad App on page 36
- Settings on page 37
- Logging In on page 39
- Logging Out on page 41
- OnBase Mobile Access for iPad App Information on page 41

For information on the module functionality and features available in OnBase Mobile Access for iPad, see the following topics:

- Document Search on page 44
- Workflow on page 48
- Upload on page 62
- New Form on page 82
- Managing Locks on page 84
- Working With Documents on page 85
- Working With Keywords on page 93
- Working With Notes and Annotations on page 101
- Working With Unity Forms on page 107

Opening The OnBase Mobile Access for iPad App

Open the OnBase Mobile Access for iPad app by tapping the **OnBase** app icon on the iPad's home screen:

If you are opening OnBase Mobile Access for iPad for the first time, see the following topic, Opening OnBase Mobile Access for iPad For The First Time on page 36.

Opening OnBase Mobile Access for iPad For The First Time

When you launch the OnBase Mobile Access for iPad app for the first time, you are prompted to enter your Mobile Applications Broker Server URL.

1. Enter the URL for your Mobile Applications Broker Server. For example: `https://[mobile_broker_server]/MobileBroker`

Note: The Mobile Applications Broker Server you are connecting to must be configured to use secure connections. If the URL you entered is unable to be validated, contact your system administrator.

---

2. Tap **Next**.

   Upon entering a valid Mobile Applications Broker Server URL, you are notified that you may log in.

Note: If your OnBase solution is configured for device registration, the Device Registration screen is displayed instead. For information on how to register your device, see Configure Device Registration on page 38.

---

3. Tap **OK** to continue.

   The login screen is displayed.
4. Enter your OnBase user name in the **User Name** field.

Note: If your Mobile Applications Broker Server is configured to use multiple domains, you must specify a domain in front of your user name. The domain and user name are separated by a backslash, e.g., **domain.net\username**. If you have questions, please contact your system administrator.

---

5. Enter your OnBase password in the **Password** field.
6. Tap the **Login** button, or tap the **Enter** key on the virtual keyboard to log in.

7. If your device supports Touch ID or Face ID, you may be prompted to select whether or not to use this for logging in to OnBase. For information about logging in using biometric authentication, see Logging In Using Biometric Authentication on page 39.

Changing an Expired Password

Depending on your system configuration, if your password has expired, you may be prompted to change your expired password during login. If you attempt to log in with an expired password, the following prompt is displayed:

Your password has expired. Please create a new password.

To continue logging in, you must enter a new password, then enter it again to verify. When you are finished changing your password, tap **OK** to continue logging in.

Settings

The OnBase Mobile Access for iPad **Settings** menu contains various application options for OnBase Mobile Access for iPad that you can adjust in order to personalize your user experience. To access the application settings, tap **Settings** on the login screen:

See the corresponding topics below for information regarding the items listed in the settings menu.

- Server on page 37
-
- Biometric Authentication on page 38
- Remember User Name on page 38
- Configure Device Registration on page 38

Additional permission settings for OnBase Mobile Access for iPad can also be specified within the iOS Settings app on your iPad. For information on these permissions, see Adjusting iOS App Permissions on page 42.

Server

This field contains the Mobile Applications Broker Server URL. If you need to change the URL, tap **Edit**.

Data Source

The **Data Source** field is displayed if the server is configured to use multiple data sources. Enter the name of the data source to connect to.

Biometric Authentication

On iOS devices that support biometric authentication (e.g., Touch ID® or Face ID®), the OnBase app allows you to associate your login credentials with Touch ID or Face ID for quicker login.

To use biometric authentication with the OnBase app, the device must support Touch ID or Face ID, and Touch ID or Face ID must also be enabled in the iOS Settings app. Refer to Apple's documentation for additional information.

To enable biometric authentication in the OnBase app, toggle the **Touch ID** or **Face ID** setting so it is enabled.

Note: When biometric authentication is enabled, the **Remember User Name** option is also enabled. This cannot be disabled unless Touch ID is also disabled. This is expected behavior due to the nature of Touch ID authentication.

After enabling the Touch ID or Face ID setting, you will be prompted to set up Touch ID or Face ID authentication the next time you log in.

Remember User Name

This setting controls whether or not your user name is remembered each time you launch the OnBase Mobile Access for iPad app.

When this option is set to **On**, the last user name you successfully logged in with will be remembered each time you launch the app.

When this option is set to **Off**, you will need to enter your user name each time you launch the app.

Configure Device Registration

Your system administrator may request or require that you register your device with your organization's Active Directory network before you can use OnBase on your device.

To register your device:

1. When prompted with the Device Registration screen, enter your **User Name**, **First Name**, **Last Name**, and **Email Address** in the respective fields.
2. Tap **Register** to submit the device registration form.

   Upon submission, a registration email containing a confirmation link is generated and sent to the email address configured for device authentication.
3. The owner of the email account associated with device registration must click the registration confirmation link in the email in order for your device to be registered.

   Once the link in the email is clicked, the device is authenticated for use.

Logging In

After opening the application, the login screen is displayed. To log in to Mobile Access for iPad, complete the following steps.

1. Enter your OnBase user name in the **User Name** field.

Note: If your Mobile Applications Broker Server is configured to use multiple domains, you must specify a domain in front of your user name. The domain and user name are separated by a backslash, e.g., **domain.net\username**. If you have questions, please contact your system administrator.

2. Enter your OnBase password in the **Password** field.
3. Tap the **Login** button, or tap the **Enter** key on the virtual keyboard to log in.

Logging In Using Biometric Authentication

If Touch ID or Face ID is enabled for the OnBase app, you can associate your OnBase login credentials with Touch ID or Face ID for authentication.

Note: Touch ID or Face ID must be enabled in the iOS Settings app as well as on the Settings screen in the OnBase app in order to use biometric authentication to log in.

During first time setup of the app, you are prompted to select whether or not to set up Touch ID or Face ID authentication to log in to OnBase.

To set up authentication:

1. Enter your OnBase user name in the **User Name** field.
2. Enter your OnBase password in the **Password** field.
3. Tap the **Login** button, or tap the **Enter** key on the virtual keyboard to log in.

   You are prompted to choose whether or not to use Touch ID or Face ID to log in to OnBase.
4. Follow the prompts displayed on the screen. When you are finished, a confirmation is displayed and you are logged in to the app.

If you have already set up Touch ID or Face ID authentication for OnBase:

1. To log in as the user displayed on the login screen, tap **Use Touch ID** or **Use Face ID**.
   - Another OnBase user can temporarily log in if necessary while biometric authentication is enabled. See Temporarily Logging In as a Different OnBase User on page 40 for information.
   - If you need to change the OnBase user associated with biometric authentication, see Changing the OnBase User Associated With Biometric Authentication on page 40 for information.
2. Follow the prompts displayed on the screen. Once your credentials are authenticated, you are logged in to the app.

Temporarily Logging In as a Different OnBase User

If necessary, another OnBase user can temporarily log in while biometric authentication is enabled for the primary user of the device.

If Touch ID or Face ID is enabled and another OnBase user needs to temporarily log in, do the following:

1. On the login screen, tap **Switch Accounts**.
   A login screen is displayed.
2. Enter your OnBase user name in the **User Name** field.
3. Enter your OnBase password in the **Password** field.
4. Tap the **Login** button, or tap the **Enter** key on the virtual keyboard to log in.
   Once your credentials are authenticated, you are logged in to the app.

Changing the OnBase User Associated With Biometric Authentication

If necessary, you can change the primary OnBase user associated with biometric authentication (e.g., to reassign a shared device) by disabling and re-enabling the Touch ID or Face ID setting on the Settings screen.

To change the OnBase user used for biometric authentication, do the following:

1. On the login screen, tap **Settings**.
2. Toggle the **Touch ID** or **Face ID** setting so it is disabled.
   You are prompted to confirm this action.
3. Tap **Disable**.
4. Toggle the **Touch ID** or **Face ID** setting so it is enabled.
5. Tap **Back** to return to the login screen.
6. Enter the new OnBase **User Name** to use with biometric authentication.
7. Enter the OnBase **Password** for the specified user name.
8. Tap the **Login** button, or tap the **Enter** key on the virtual keyboard to log in.
   You are prompted to choose whether or not to use Touch ID or Face ID to log in to OnBase.
9. Follow the prompts displayed on the screen. When you are finished, a confirmation is displayed and you are logged in to the app.

Viewing Announcements

After logging in, if any **Announcements** are available, they are displayed on the screen.

If multiple announcements are available, swipe to the left or right to view them.

When you are finished viewing announcements, tap **Done** to close the screen.

Logging Out

To log out of the OnBase Mobile Access for iPad app, tap the menu icon, then tap **Logout**.

OnBase Mobile Access for iPad App Information

For information about app notifications and navigating the OnBase Mobile Access for iPad app, see the following topics.

- Navigating Between Modules on page 41
- Adjusting iOS App Permissions on page 42
- Using Gestures on page 43
- OnBase Network Connectivity Status Indicators on page 43
- Viewing More Toolbar Options on page 44

Navigating Between Modules

In OnBase Mobile Access for iPad, you can navigate freely between modules without losing your place. When you navigate between modules, your place is saved so when you return to a module, you can continue working where you last left off.

Note: Positions are not saved if you close Mobile Access for iPad, log off, or manually refresh.

You can navigate between modules by using the **App Menu**. The app menu is displayed on the left side of the screen, and it lists all of the modules that you have access to. You can display the app menu by tapping the Menu icon located in the upper left corner of the screen:

When you display the app menu, the currently selected module is highlighted so you can easily tell which module you're working in.

The following modules may be available in the app menu based on your licensing and user privileges:

Module	Description
Document Search	Tap **Document Search** to open the Document Search module and search for documents. See Document Search on page 44 for more information.
Workflow	Tap **Workflow** to open the Workflow module. See Workflow on page 48 for more information.

Module	Description
Upload	Tap **Upload** to open the Upload module and upload files to OnBase. See Upload on page 62 for more information.
New Form	Tap **New Form** to create a new Unity Form or E-Form. See New Form on page 82 for more information.
Logout	Tap **Logout** to log out of OnBase.

Adjusting iOS App Permissions

Additional permission settings for OnBase Mobile Access for iPad can also be specified within the iOS Settings app on your iPad. To access these permissions, open the **Settings** app on your iPad and select the **OnBase** app.

Note: Some permissions may not be listed for OnBase. Only the permissions that have already been requested are displayed.

The following table contains descriptions of each of the permissions:

Permission	Description
Location	The **Location** permission controls whether or not your GPS location coordinates are attached to new documents that are uploaded to OnBase via the Upload module. To allow OnBase to use your location, set this to **While Using the App**. To prevent OnBase from using your location, set this to **Never**.
Photos	The Photos permission controls whether or not OnBase can access the iPad's Photos app for uploading images to OnBase. To allow OnBase to access the iPad's Photos app, set this to **On**. To prevent OnBase from accessing the Photos app, set this to **Off**.
Camera	The **Camera** permission controls whether or not the camera can be used when uploading images to OnBase via the Upload module. To allow OnBase to use the camera, set this to **On**. To prevent OnBase from using the webcam, set this to **Off**.
Notifications	The **Notifications** permission controls whether or not you will receive certain status notifications from OnBase while the app is in the background. For example, you can receive a notification if the OnBase app is about to time out while you are working on an E-Form that has not yet been saved. To receive these types of notifications from OnBase, set **Allow Notifications** to **On**. To disable these types of notifications from OnBase, set **Allow Notifications** to **Off**.

Using Gestures

Gestures are used to perform actions on touch-screen devices without the use of a physical keyboard or mouse.

The following table describes gestures that you may be able to use and how to perform them on a touch screen device.

Gesture Name	Description	How to Perform
Pan / Scroll	Panning and scrolling allows you to view another part of a page that is outside of the viewing area, for example, when viewing a document that has been zoomed in on, or when a page of a document is longer than the size of the screen.	Touch and drag a document page to move it around in the document viewing area.
Zoom	Zooming allows you to make an area of a document larger or smaller. Zooming in allows you to see greater detail of a document. Zooming out allows you to see a larger area of a document.	To zoom out, touch two fingers to the screen and move them toward each other in a pinching motion. To zoom in, touch two fingers to the screen and move them apart from each other.

OnBase Network Connectivity Status Indicators

The OnBase Mobile Access for iPad app displays status indicators in the navigation menu to notify you of your current OnBase network connectivity status. The following status indicators may be displayed in the navigation menu:

Notification	Description
	The **Online** indicator is displayed when the app has an active network connection to the OnBase server.
	The **Offline** indicator is displayed when the app does not an active network connection to the OnBase server.

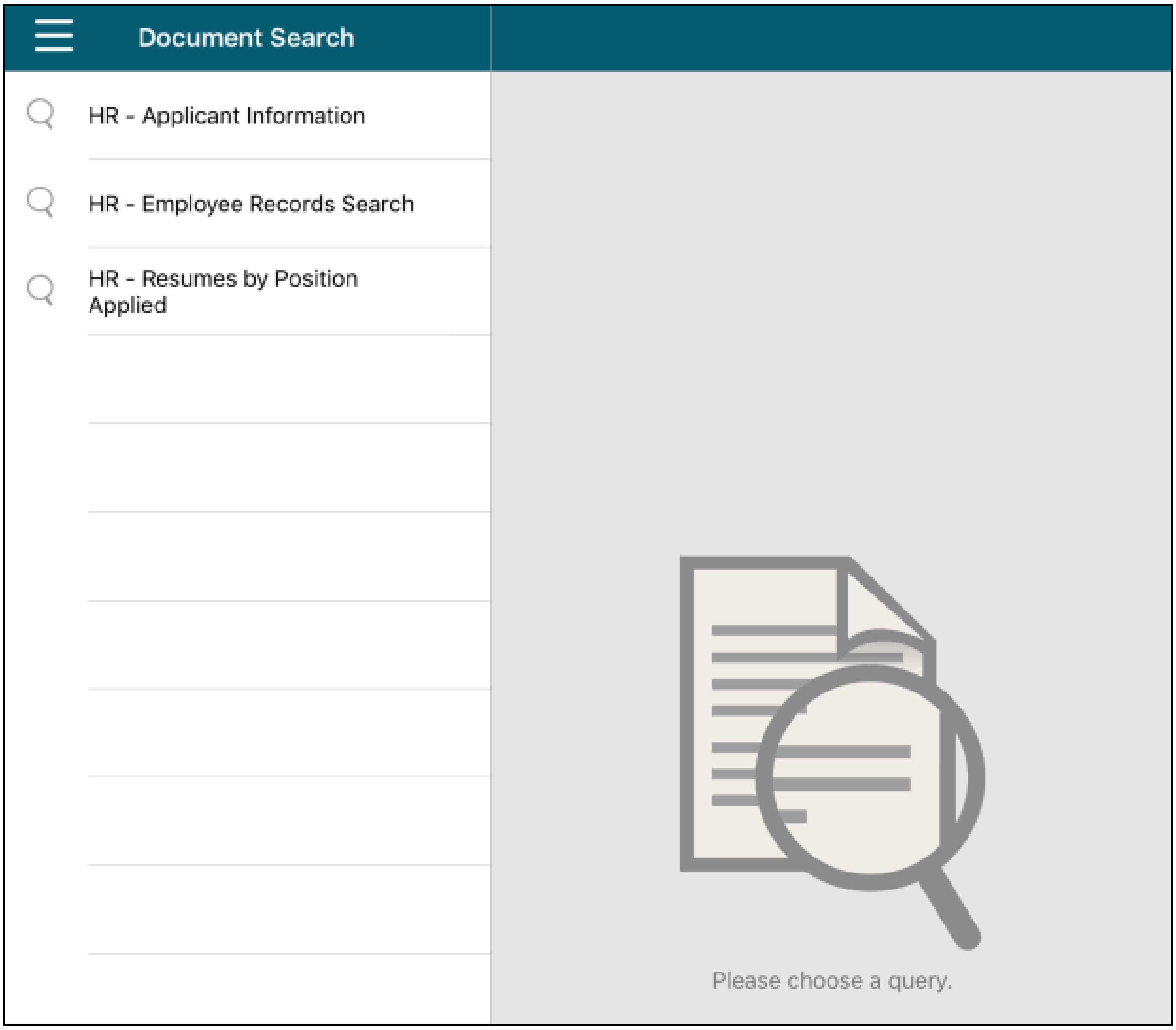
Viewing More Toolbar Options

When viewing documents, some icons in the toolbar may not be shown due to the limited number of icons that can be displayed on the screen. To display more options, tap the ellipsis icon:

Document Search

The Document Search module allows you to conduct a pre-defined search for documents. The searches that are available to you are configured by your system administrator.

The Document Search screen is displayed by selecting **Document Search** from the app menu. The Document Search screen contains a list of queries that you can conduct to retrieve documents.



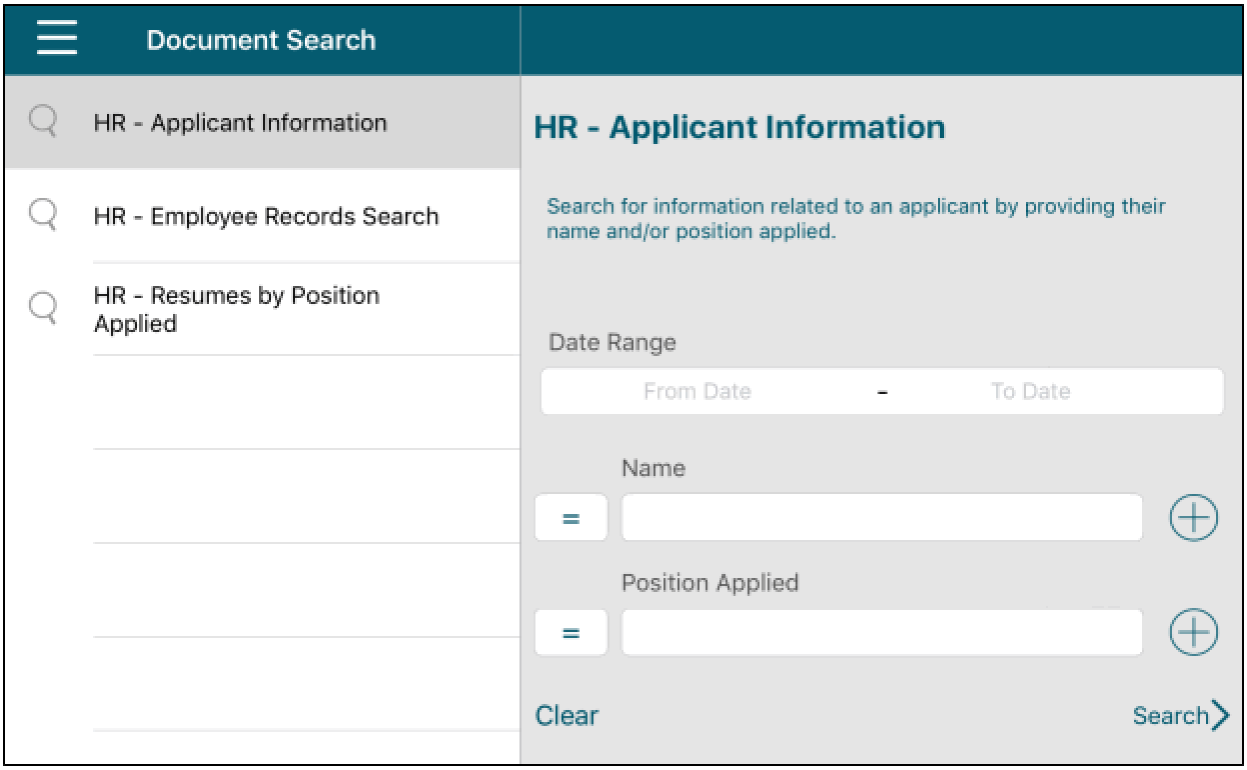
For more information about the available Document Search features, see the following topics:

- Searching for Documents on page 46
- Viewing Documents From a Document Search on page 48
- Working With Keywords on page 93

Searching for Documents

To search for documents in the Document Search module, complete the following steps:

1. On the Document Search screen, select one of the pre-defined queries.
   The search pane for the query that you selected is displayed on the right side of the screen. The search pane may look like the one below, or it may be a customized form, depending on your configuration.



2. Tap a text field to start entering criteria for the query.

3. Complete as much of the form as necessary by selecting, inserting, or editing the appropriate values. If there are instructions at the top of the search form, be sure to follow them.

Tip: You can use additional Keyword Type field functionality for document searches that appear in the search pane, including adding additional instances of a Keyword Type, or using Wildcard or Boolean operators to narrow the search. For more information about the additional keyword functionality, see the topic titled Working With Keywords on page 93.

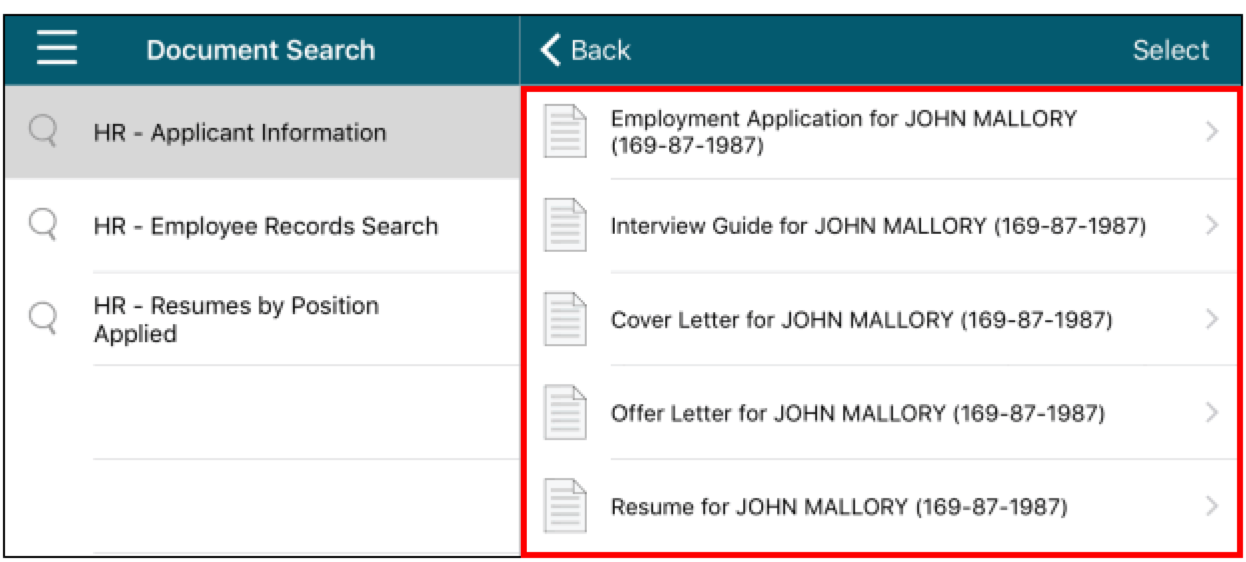
To clear the text you've entered in a field, tap the corresponding **X**:

- To add another value for a Keyword Type, tap the plus (**+**) icon next to the keyword field.
- To clear all keyword values and start over, tap **Clear** at the bottom of the screen.

4. When you are done entering search criteria, tap **Search** or press Enter.

Note: If invalid search criteria are entered, the fields containing incorrect criteria are highlighted in red. You must enter valid criteria to continue.

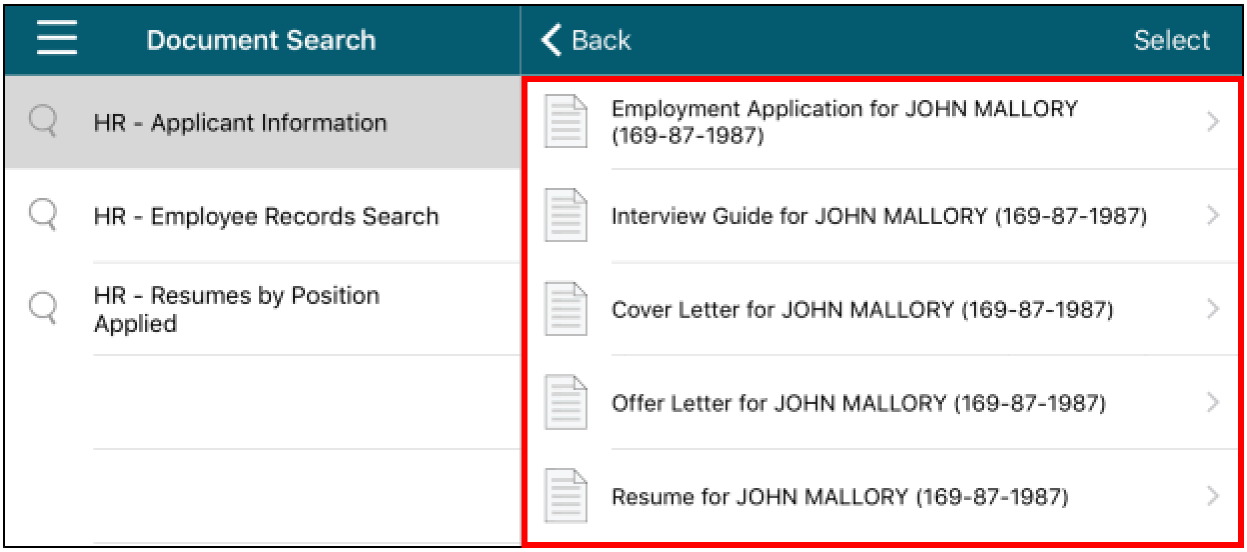
Documents matching the search criteria are displayed on the right.



5. To open a document from your search, Tap the name of the document in the results list. The document is displayed.

Viewing Documents From a Document Search

To view documents after performing a document search, simply tap the document you wish to view from the list of search results:



Once you tap a document, it is displayed in a full screen view. For information about the functionality that is available when viewing documents, see Working With Documents on page 85.

Workflow

Workflow Document Security

Access to Workflow in OnBase Mobile Access for iPad is accomplished by a combination of assignments made at the Document Type, life cycle, and work queue level. Specifically:

- Document Types must be configured for use in a specific life cycle.

  In the Configuration module, select **Document | Document Types**, then select the desired Document Type and select **Life Cycles**. Assign the desired life cycles at the **Life Cycles** dialog box.
- Users must be granted rights to a specific life cycle, as well as each queue within that life cycle, in order to view the metadata of documents within those queues.

  In the Configuration module, select **Users | User Groups/Rights**. Select the desired User Group and select **Workflow**. Assign the desired life cycles and queues at the **Assigning Workflow for <user group>** dialog box.

- Users must be granted the **Retrieve/View** privilege, either as a User Group privilege or as an override privilege. If this privilege is not granted (or in the case of override privileges, overridden), users will not be able to view the metadata of documents in OnBase Mobile Access for iPad. For more information on configuring User Groups, see the System Administration documentation.

Caution: The ability to view the metadata of documents in a life cycle is controlled at the queue level. If a user has rights to a Workflow queue that has been configured with a task list that is **Available for Mobile Devices**, they will also have rights to view all the documents in that queue by default, regardless of their security rights (i.e., Document Type rights). This includes related documents.

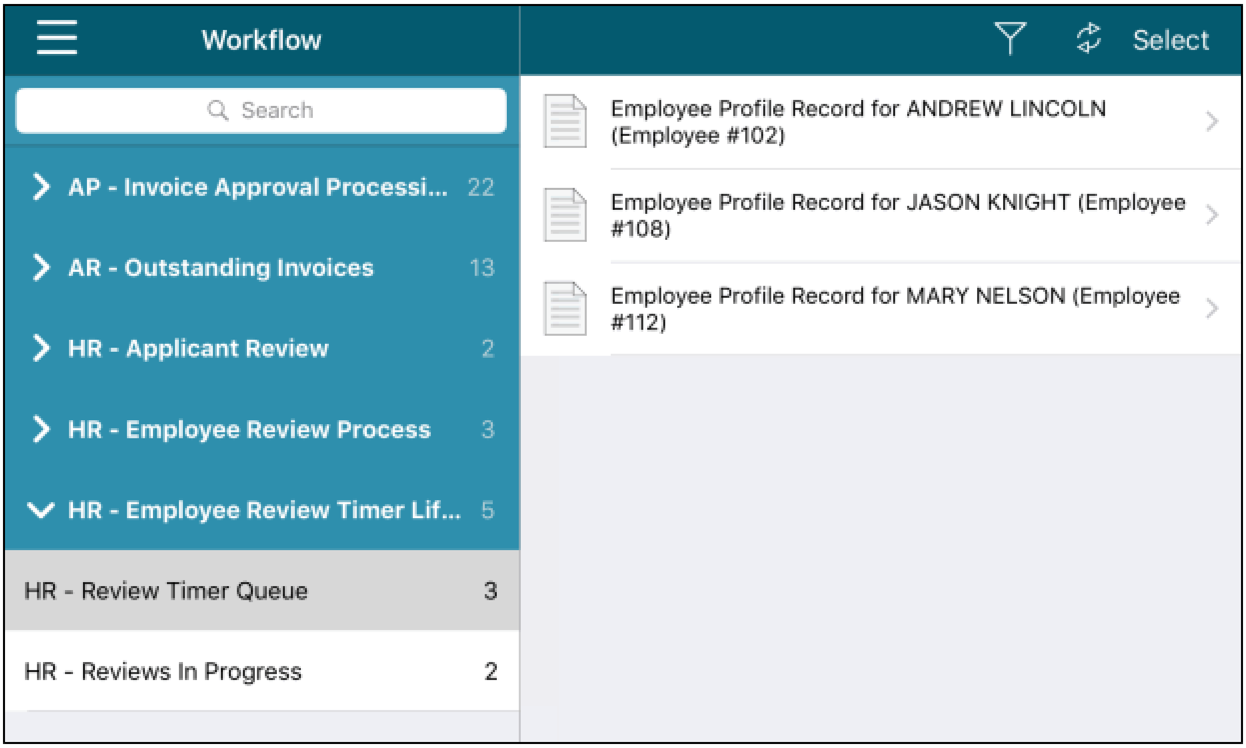
Caution: The ability to modify a document in a life cycle is controlled at the queue level. If a user has rights to a Workflow queue, he or she will also have rights to modify all documents in that queue by default, regardless of his or her **Modify** privilege setting, including related documents. Administrators should be aware that Workflow automatically grants the **Modify** privilege to the user for any documents that are in his/her queue. As a result, care should be taken to only present documents which the user should be allowed to modify. The exception to this is E-Forms (which have configurable overrides).

Accessing the Workflow Screen

To access Workflow, select **Workflow** from the app menu. The Workflow module allows you to view the documents in your OnBase Workflow Life Cycles and Queues.

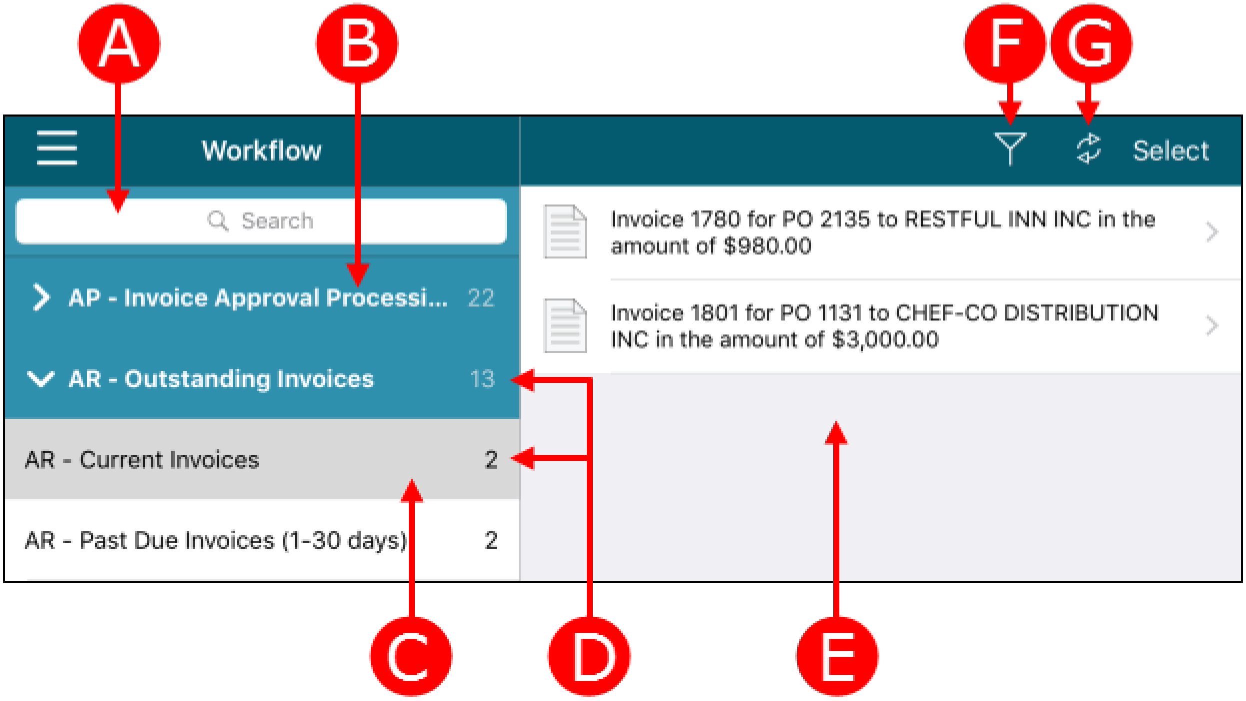
The life cycles and queues that are available to you are configured by your system administrator. If Workflow is not available in the app menu, you do not have access to Workflow. Contact your system administrator for assistance.

When you access Workflow, the Workflow screen is displayed:



The Workflow screen displays your Workflow life cycles and queues. Each queue is listed under its corresponding life cycle. Each queue also displays the number of documents in that queue.

The following graphic and table show the available actions you can take on the Workflow screen.



The areas indicated in the Workflow screen above are described in the table below.

Label	Description
A	**Queue List Filter** This search bar filters the list of queues. For information on using it, see Filtering the List of Workflow Queues on page 53.
B	**Life Cycle** This is the title of the Workflow Life Cycle. Tap the life cycle name to expand or collapse the list of Workflow queues.
C	**Queue** This is the currently selected Workflow queue. Tap the queue name to display a list of documents available in that queue.
D	**Number of Documents in a Life Cycle or Queue** This number indicates the current number of documents available in the particular life cycle or queue.
E	**Available Documents** This area contains a list of documents that are available in the currently selected queue. Tap a document to view it.

Label	Description
F	**Filter** This is the filter icon. If Workflow filters are available, you can use a filter to only display certain documents in a specific queue.
G	**Refresh** This is the refresh icon. Tap the refresh icon to check for changes and refresh your life cycles and queues. **Note:** When refreshing the Workflow screen, any filters you have previously applied are removed.

For more information about the available Workflow features, see the following topics:

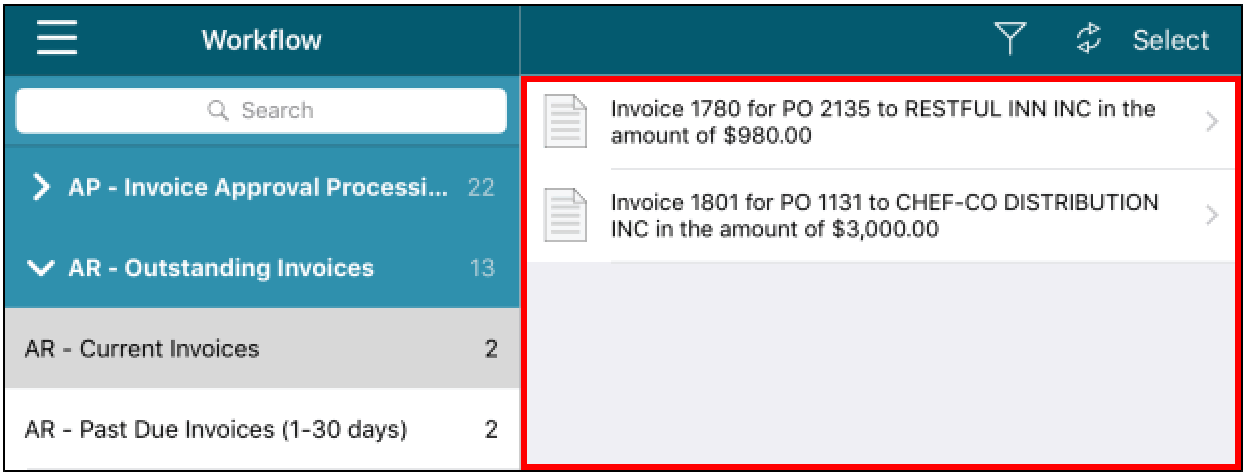
- Interacting With the Workflow Screen on page 52
- Viewing Workflow Queues on page 53
- Filtering Workflow Queue Documents on page 55
- Sorting Filtered Workflow Queue Documents on page 57
- Viewing Related Documents on page 59
- Viewing Documents Assigned to Other Users on page 60
- Performing Ad Hoc Tasks on page 61

Interacting With the Workflow Screen

By default, each life cycle is automatically expanded to show all queues containing documents. If a long list of Workflow life cycles is displayed, you can quickly collapse all of the life cycles by pressing and holding down for a few seconds on one of the life cycle headers. If all of the life cycles are collapsed, you can also quickly expand them by performing the same action.

Viewing Workflow Queues

To view the contents of a queue, tap the name of the queue on the Workflow screen. A list of documents within that queue is displayed to the right.



Tap a document to view it. For information on the available options when viewing documents, see Working With Documents on page 85.

Filtering the List of Workflow Queues

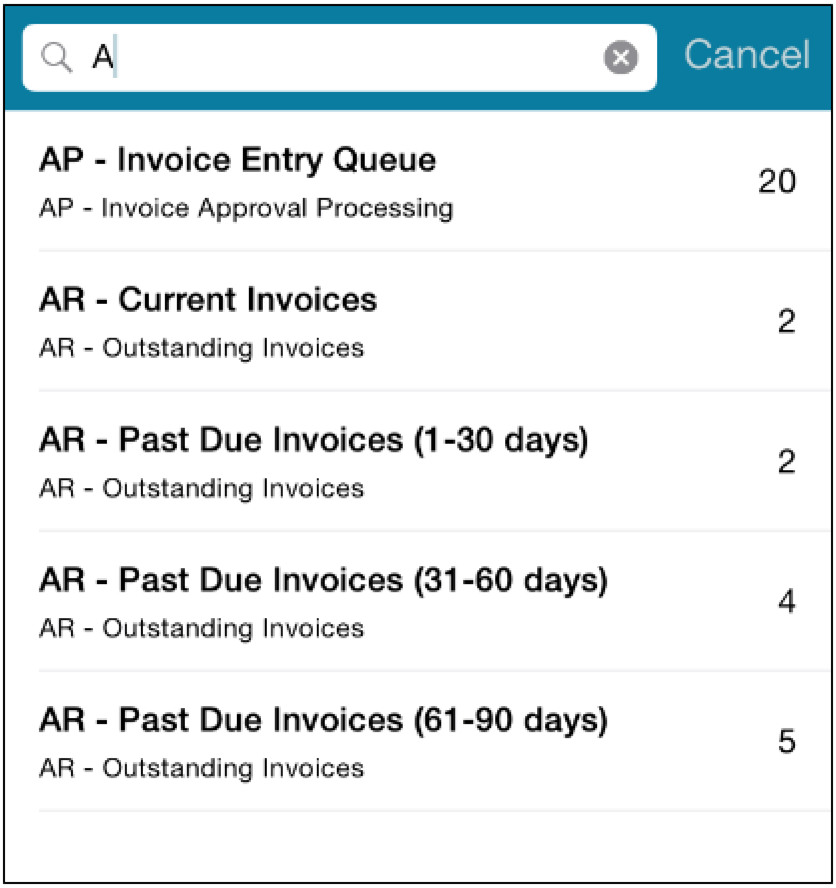
You can filter your list of Workflow queues by entering a search term in the search bar above the list of life cycles and queues:

The search bar acts as a filter to narrow down a specific queue from a larger list of Workflow queues. To filter your Workflow queues:

1. Start entering a filter term in the search box.

   As you type, the list of queues will narrow to those only containing the filter term in the queue name. Each queue displayed in the list also contains the name of the life cycle it belongs to.

2. After entering a filter term, the queues that match are displayed below.



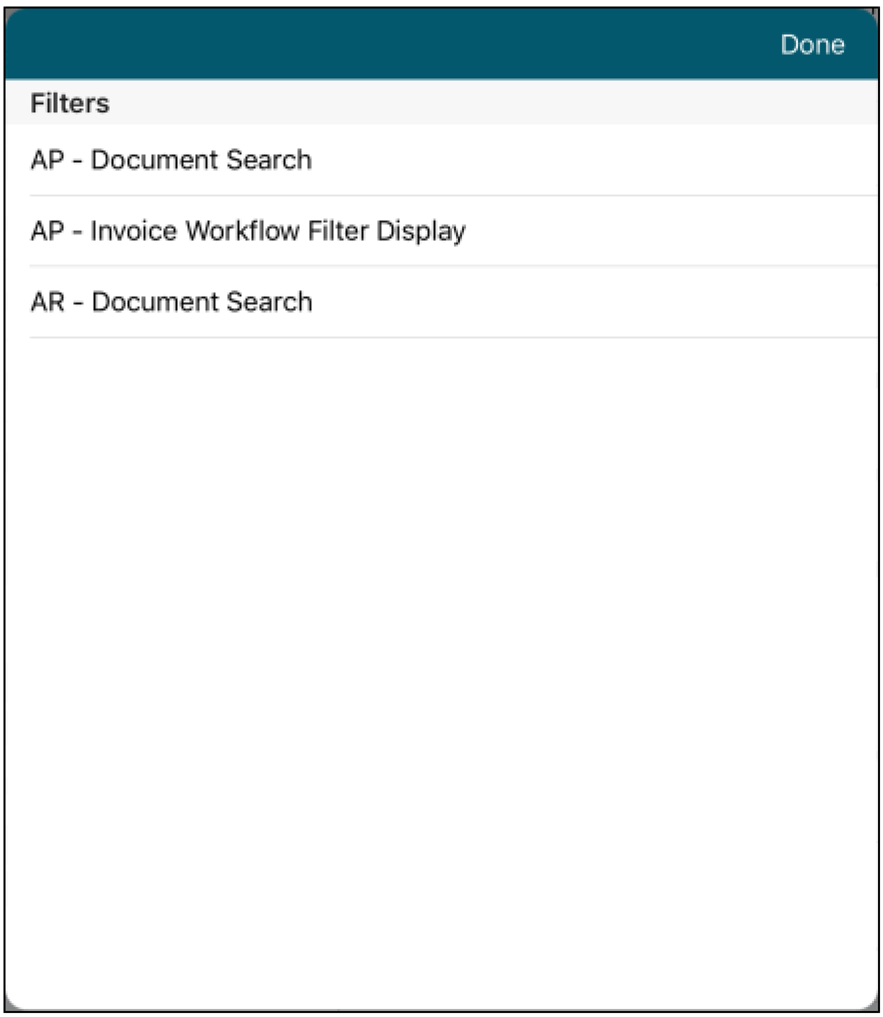
To clear the filter, tap **Cancel**.

Filtering Workflow Queue Documents

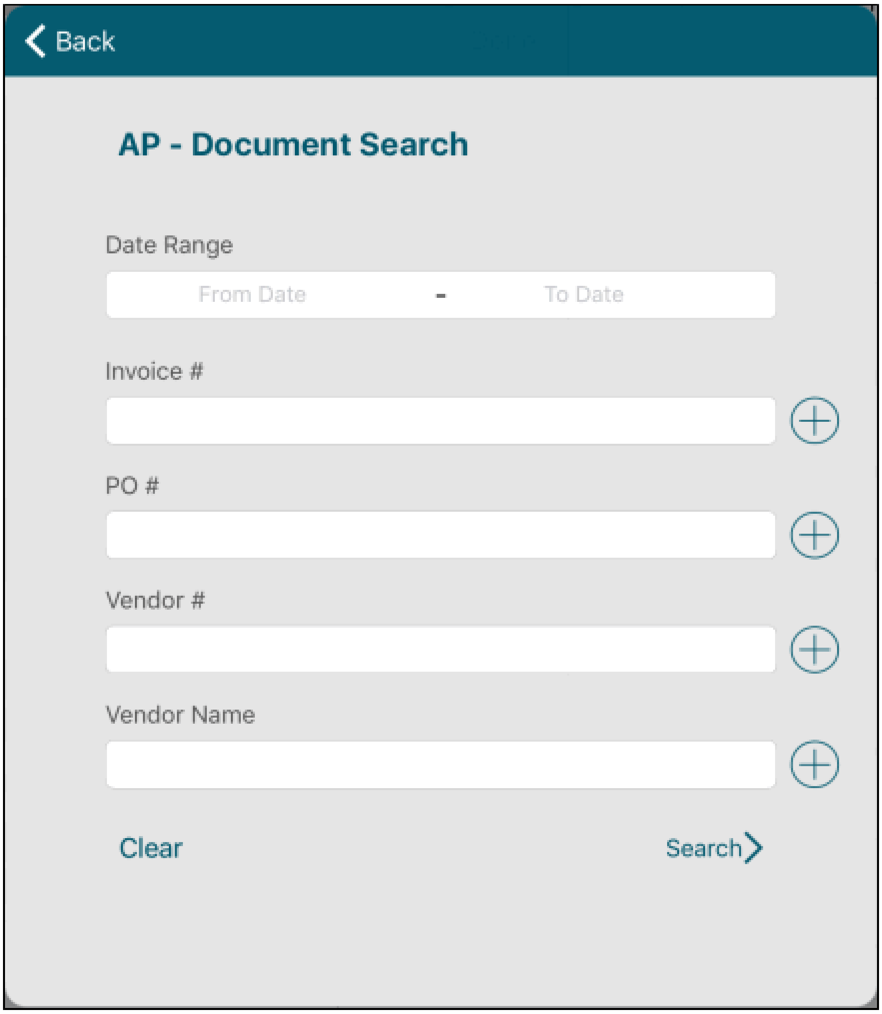
Depending on your configuration, you may be able to filter or sort queues to display a certain subset of documents within a selected queue. To filter a queue, perform the following steps:

1. While viewing a Workflow queue, tap the filter icon:

   A list of Workflow filters is displayed:



2. Tap a filter to select it. Depending on the filter's configuration, you may be prompted to enter additional filter criteria:



- To add an additional keyword value for filtering, tap the plus (**+**) icon next to the keyword field.
- To clear all keyword values in the filter pane, tap **Clear**.
- To return to the list of filters, tap **Back**.

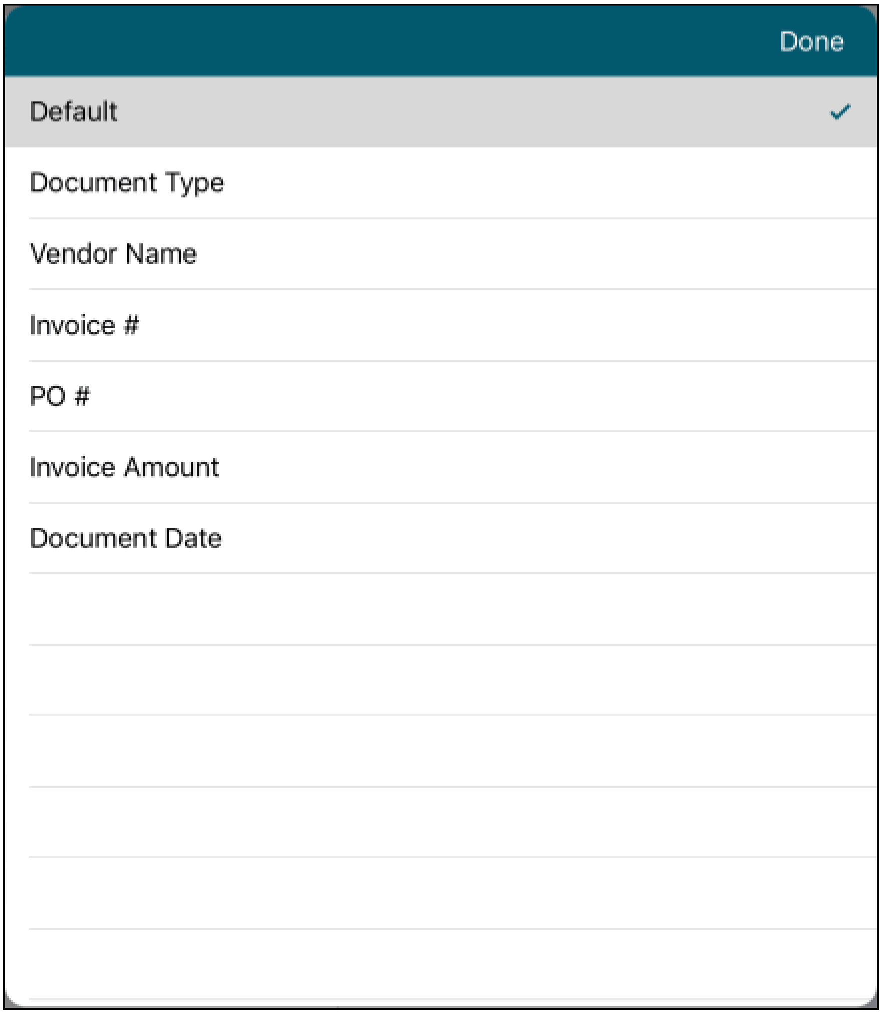
Note: Only one filter may be applied at a time.

3. After entering any additional filter criteria, tap **Search** to apply the filter.

Sorting Filtered Workflow Queue Documents

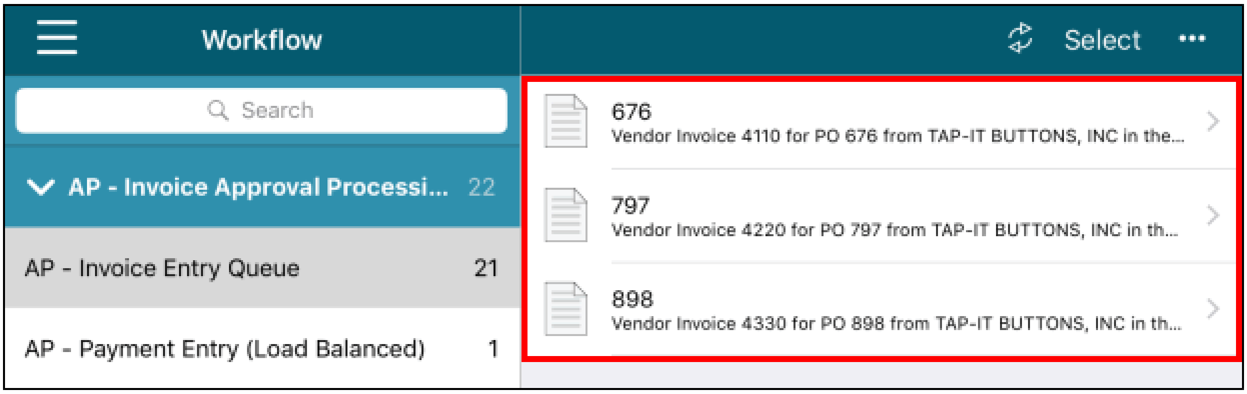
After applying a filter, you can sort the documents in the queue. Documents can be sorted in the OnBase app based on the same display columns available for the filter in the desktop-based OnBase client. To sort the documents in a filtered queue, perform the following steps:

1. While viewing a Workflow queue with a filter applied, tap the ellipsis (**...**) icon.
2. Tap **Sort**. A list of available sort options is displayed:



3. Tap to select the sort option by which documents should be sorted.

   The documents in the queue are sorted based on the option you selected. By default, the documents are sorted in ascending alphabetical order. The following example shows a filtered queue sorted in ascending order based on the **PO #** value:



- To sort documents in descending order, repeat steps 1-2 and tap the selected sort option again.
- To return the documents back to their default sort, repeat steps 1-2 and select **Default**.

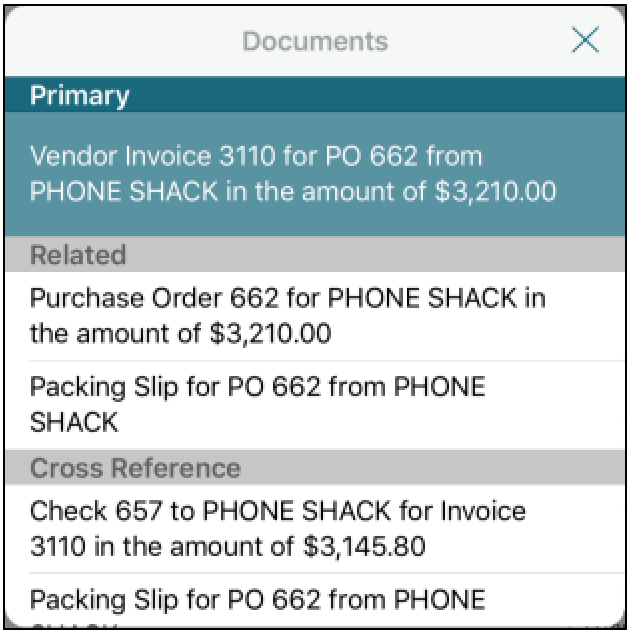
Viewing Related Documents

If a document in Workflow has related documents, you can view them by performing the following steps:

1. While viewing a document in Workflow, tap the Documents icon:

   The **Documents** list is displayed:

   The **Documents** list displays the primary document as well as all related or cross-referenced documents.
2. Tap on the related document in the list to view it.

Viewing Documents Assigned to Other Users

With the appropriate privileges, you can view documents assigned to other users in a load-balanced queue or in a queue that supports ownership. To do this, complete the following steps:

1. While viewing a Workflow queue, tap the filter icon:

   The Workflow filter pane is displayed. By default, documents are filtered based on the currently logged in user.
2. Under **Filter by User**, select **<Current User>**. A list of options is displayed.

Note: If **Filter by User** is not displayed, you may not have the appropriate privileges. Contact your system administrator for assistance.

3. Select an option to filter the documents. You can choose to view documents belonging to a specific user, all documents, or all unassigned documents. Tap the option to make your selection.

   The queue is refreshed based on your selection.

Note: Users cannot execute tasks on documents that are owned by another user.

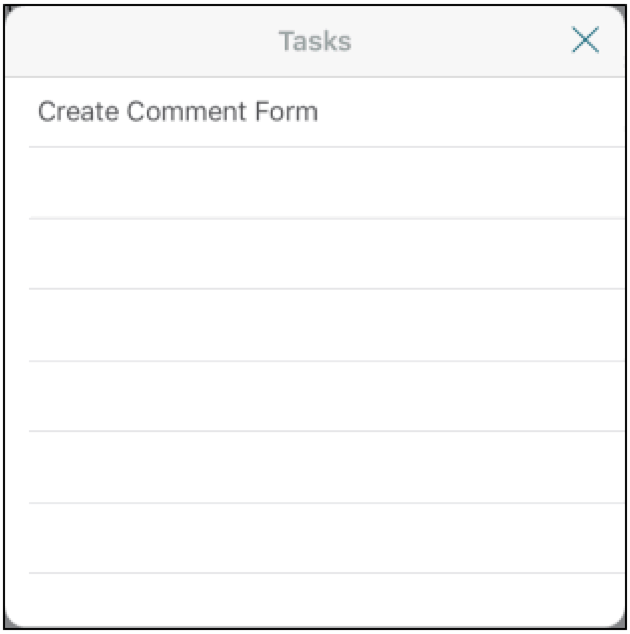
Performing Ad Hoc Tasks

Ad hoc tasks can be performed when viewing a document from a queue. To initiate an ad hoc task on a document, complete the following steps:

1. While viewing a document in Workflow, tap the Tasks icon:

   The **Tasks** list is displayed:

   The **Tasks** list displays all of the tasks that you can perform on the currently displayed document.
2. Tap the name of the task to initiate it.

   Only one ad hoc task can be performed at a time. Depending on the task, additional messages may display. If the task transitions the document out of the queue, then you are returned to the Workflow screen.

Note: You cannot perform ad hoc tasks on related documents in OnBase Mobile Access for iPad.

Cancelling Tasks During Task Execution

If necessary, you can cancel a task before it finishes executing. Tapping **Cancel** while a task is executing will cause the following message to display:

Are you sure you want to cancel this task?

Tap **Yes** to abort the task. Tasks that do not require user interaction will continue to run while the message is displayed. Because of this, it is possible that the task will finish executing before you are able to select **Yes** or **No**.

Switching Between Modules During Task Execution

If you attempt to switch between modules while a task is executing, you are prompted with the following message:

Leaving this page will cancel any tasks in progress. Are you sure you want to continue?

If you tap **Yes**, the task is aborted and you are taken to the module you selected. If you tap **No**, you will remain in Workflow and the task will continue to execute.

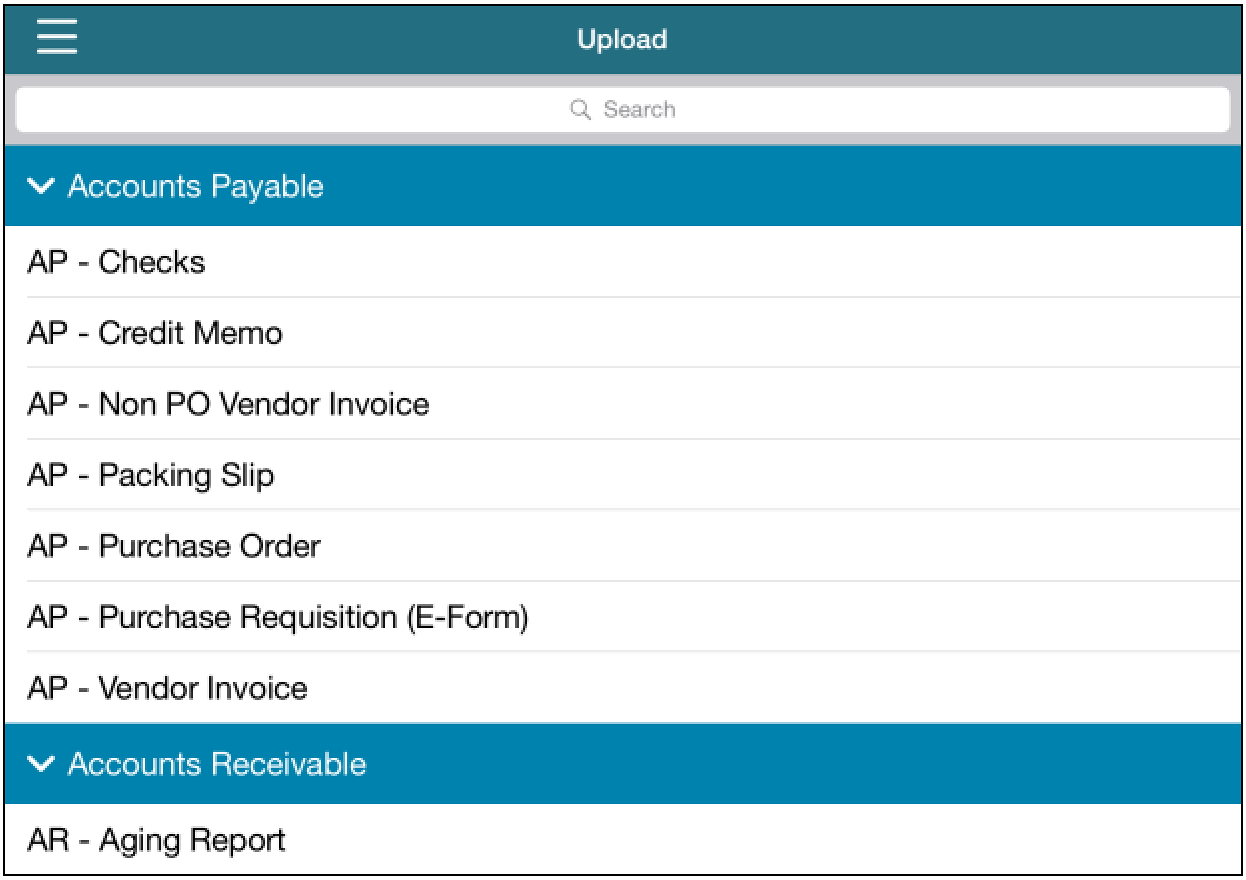
Application Timeout During Task Execution

If you background or minimize the application while a task is executing, and the application times out, the task in progress is automatically aborted.

Upload

The Upload module allows you to upload and index new documents into OnBase by either selecting an image from the device’s photo gallery, or taking a photo using the device’s camera. After selecting a document type and an image, you assign keyword values which are then indexed along with the document into OnBase.

The **Upload** module is displayed after selecting **Upload** from the navigation menu. The Upload module allows you to upload files to OnBase, if you have appropriate rights for creating and importing documents.



The Upload screen displays the available Document Type Groups and Document Types that you can upload new files to. Document Type Groups and Document Types are organized alphabetically.

See the following topics for additional information about uploading photos and images to OnBase:

- Interacting With the Upload Screen on page 64
- Uploading New Photos on page 64
- Uploading Existing Images from the Photos App on page 68

Interacting With the Upload Screen

By default, each Document Type Group is automatically expanded to show all Document Types you have access to. If a long list of Document Types and Document Type groups is displayed, you can quickly collapse all of the Document Type Groups by pressing and holding down for a few seconds on one of the Document Type Group headers. If all of the Document Type Groups are collapsed, you can also quickly expand them by performing the same action.

Tip: You can use the search box in the upper right corner of the screen to narrow down a long list of available Document Type Groups and Document Types. Start entering text contained in the title of the Document Type Group or Document Type you would like to find.

Uploading New Photos

To take photos with the camera and upload them as a new OnBase document, perform the following steps:

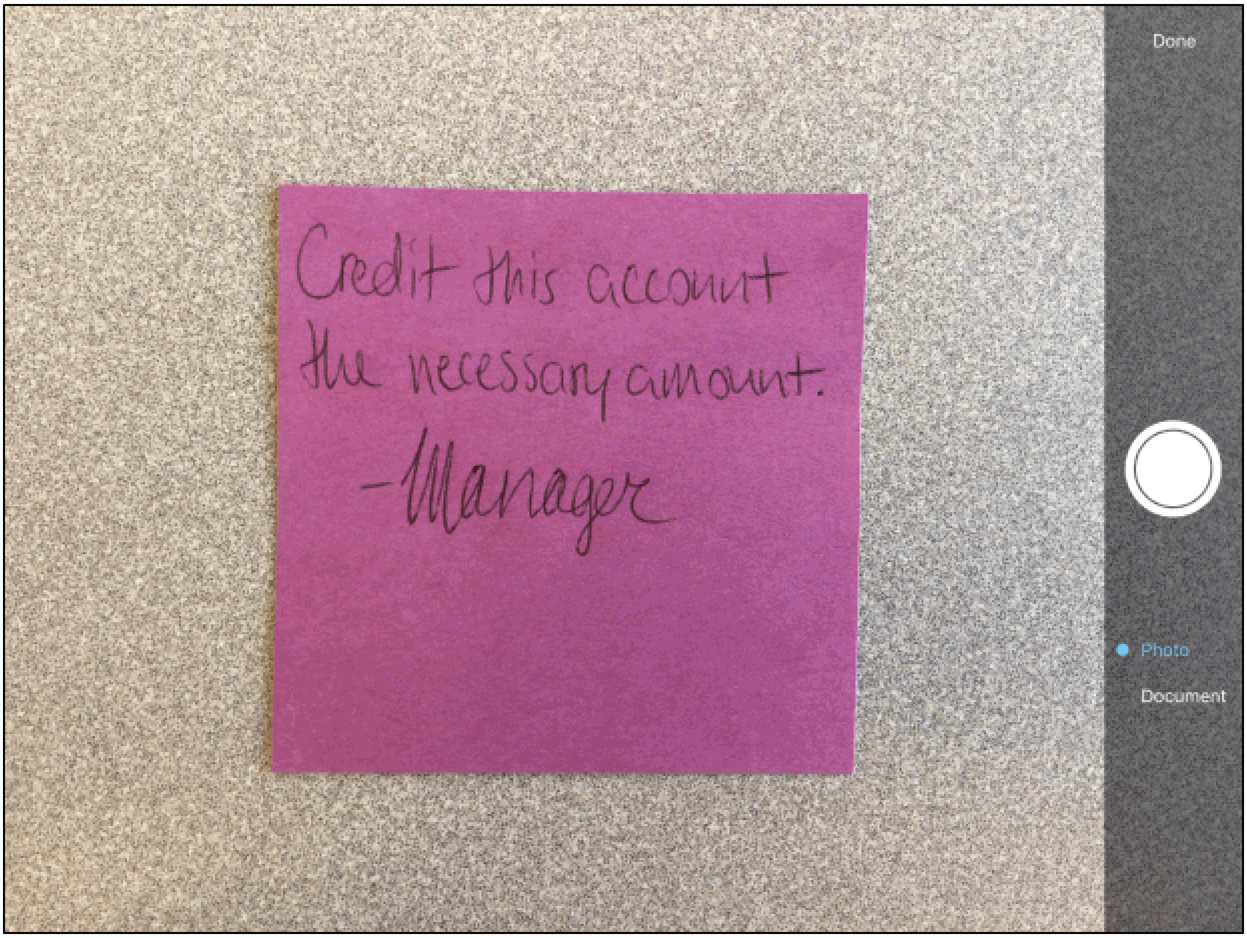
1. On the Upload screen, tap to select the Document Type that the file should be uploaded to.

Note: Depending on your system configuration, you may be prompted for the application to use your location when uploading a new document. If you are prompted, tap **OK** or **Allow** to allow OnBase to use your location. You can change this setting by accessing OnBase settings within the iOS **Settings** app.

2. Tap the plus (**+**) icon and choose the **Add Images from Camera** option.

Note: If you are prompted, tap **OK** to allow OnBase to use the camera.

The camera viewfinder is displayed.



3. In the camera viewfinder, select the type of image you want to capture. By default, **Photo** is selected. Choose from the following options:

Option	Description
Photo	Select this option to capture a high-quality color image. Images taken using the Photo option are saved as JPEG images. Compared to the Document option, the **Photo** option does not automatically crop or deskew the image. You can manually crop or edit images captured with the Photo option later from the page list, if needed. See Editing Mode on page 70 for information.

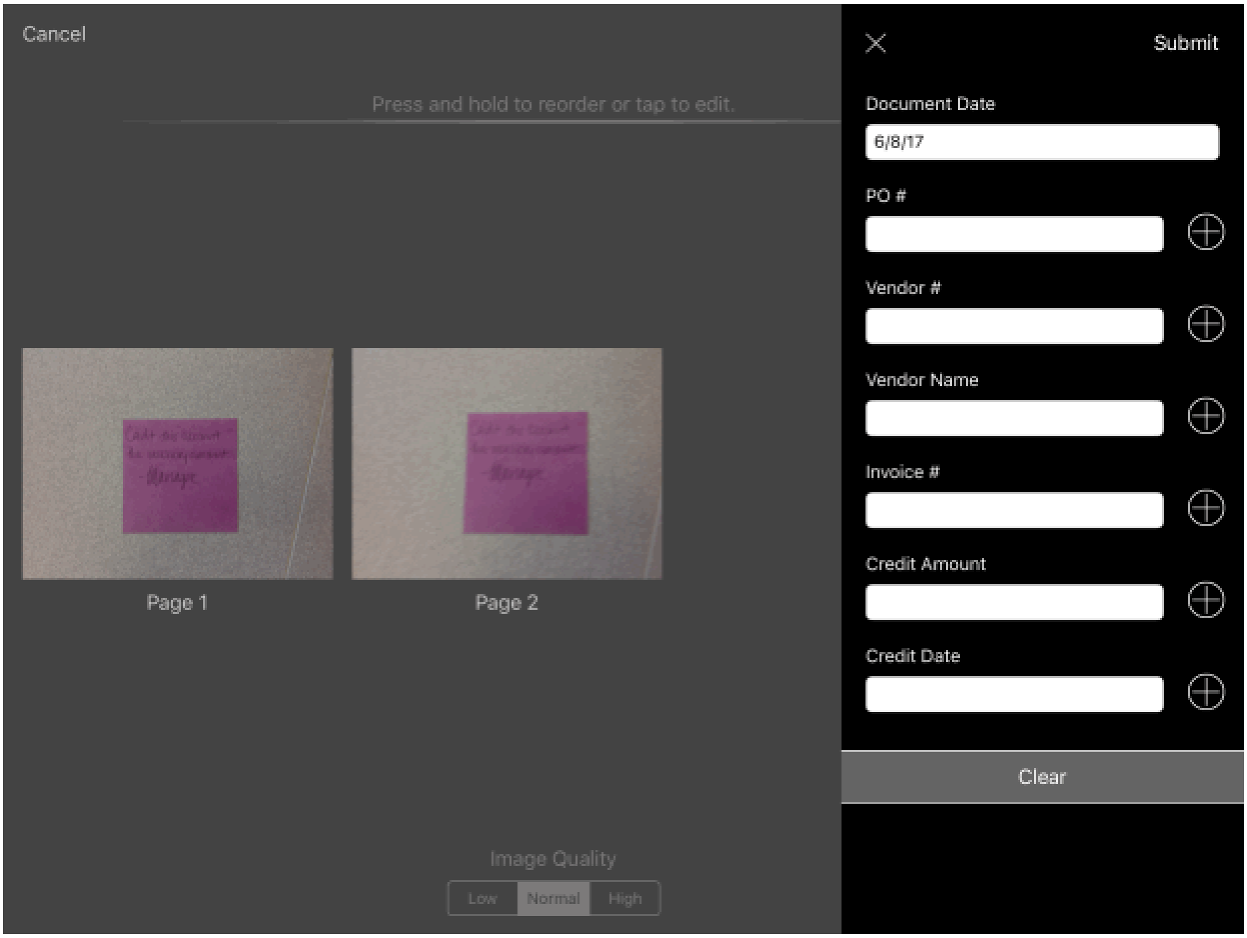
Option	Description
Document	Select this option to capture a document. Images taken using the Document option are saved as TIFF images. When **Document** is selected, after taking the photo, it is automatically converted into a grayscale image. This option is useful for capturing the text on a document when a high-quality image is not needed. Additionally, the app will attempt to detect the edges of the document in the photo and automatically crop and deskew the image so only the document is displayed. If the image isn't captured properly, you can retake the photo or adjust how the image is cropped or deskewed from the page list. See Editing Mode on page 70 for information.

4. Aim the device's camera, then tap the shutter button to take a photo.
5. You can continue taking additional photos, if necessary. Each additional photo will be added as a separate page of the new document being created.
6. When you are finished taking photos, tap **Done**. The page list is displayed.

   The page list shows all of the photos you have taken so far, and allows you to reorder, retake, or delete photos. The following actions can be taken in the page list:

   - To scroll between multiple thumbnails, drag the screen to the left or right.
   - To rearrange the pages, press and hold your finger on the page you want to move, and then drag and drop it in the new location.
7. If necessary, you can delete, replace, or edit any of the pictures you have taken so far before you upload them. For information on these editing options, see the topic titled Editing Mode on page 70.

8. When you are finished taking pictures, tap **Index** in the upper right corner of the screen.
   The indexing panel is displayed:



9. Tap a keyword field to enter a value for the selected keyword. Required keywords are indicated by an asterisk (*). Invalid keywords are highlighted in red and must be corrected before you can continue uploading the document.
   - To add another value for a Keyword Type, tap the **Add (+)** button to the right of the keyword field.
   - To clear out a value for a Keyword Type, tap the **X** in the keyword field.
   - To clear all of the entered keyword values and start over, tap the **Clear** button at the bottom of the keyword panel, then tap **OK** to clear the keyword fields.
10. Once you are finished entering keyword values, tap **Submit** to upload the new document.
    Once the new document is finished uploading, you are returned to the Upload screen.

Uploading Existing Images from the Photos App

To upload existing images from the iPad's Photos app as a new OnBase document, complete the following steps:

1. On the Upload screen, tap to select the Document Type that the file should be uploaded to.

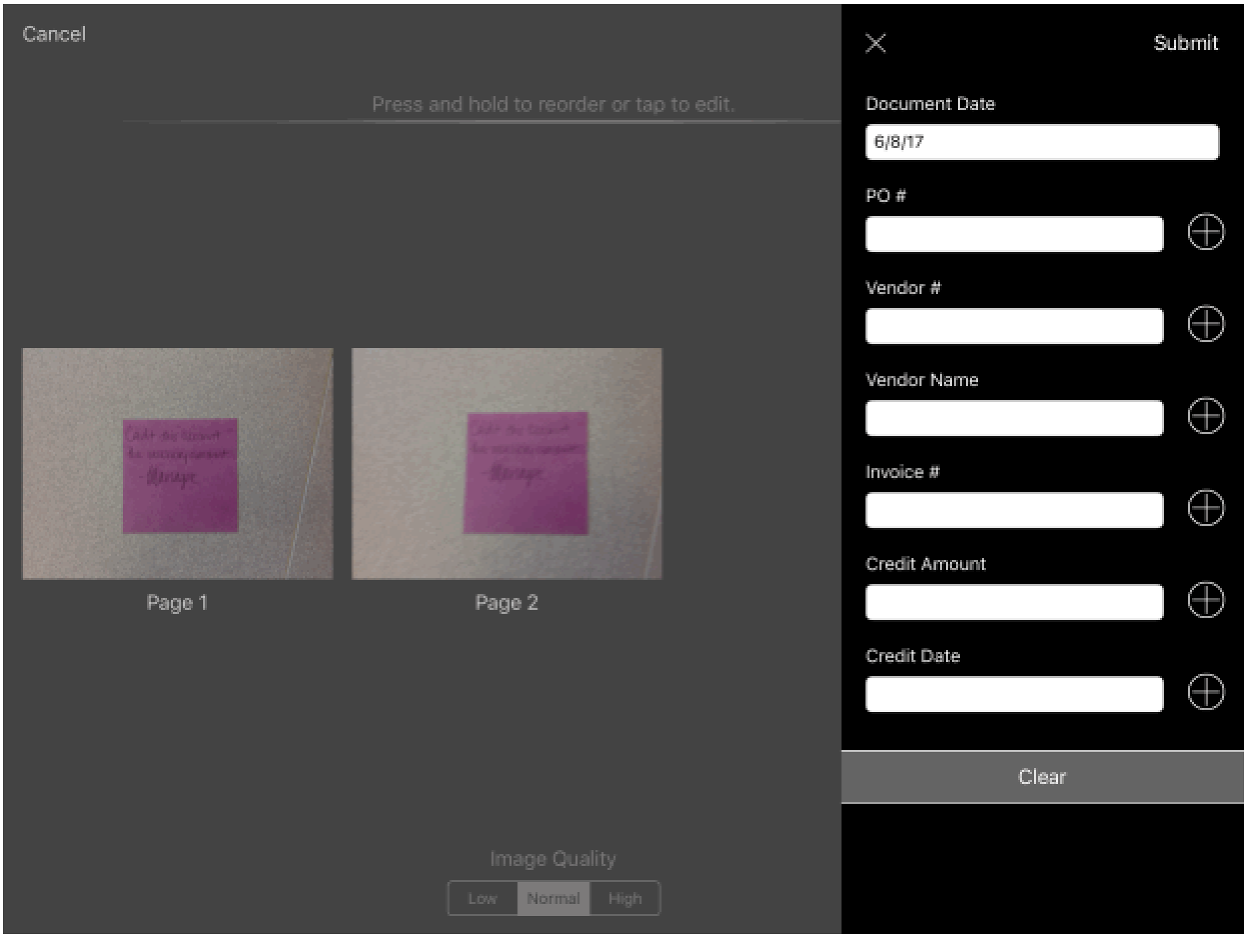
Note: Depending on your system configuration, you may be prompted for the application to use your location when uploading a new document. If you are prompted, tap **OK** or **Allow** to allow OnBase to use your location. You can change this setting by accessing OnBase settings within the iOS **Settings** app.

2. Tap the plus (**+**) icon and choose the **Add Images from Gallery** option.

   A list of available images is displayed.
3. Select one or more images for upload by tapping each individual thumbnail.
4. When you are finished selecting images, tap **Use**. The page list is displayed.

   The page list shows all of the images you have added so far, and allows you to reorder, replace, or delete images. The following actions can be taken in the page list:
   - To scroll between multiple thumbnails, drag the screen to the left or right.
   - To rearrange the pages, press and hold your finger on the page you want to move, and then drag and drop it in the new location.
5. If necessary, you can replace or delete any of the images you have added so far before they are uploaded. For information on these editing options, see the topic titled Editing Mode on page 70.

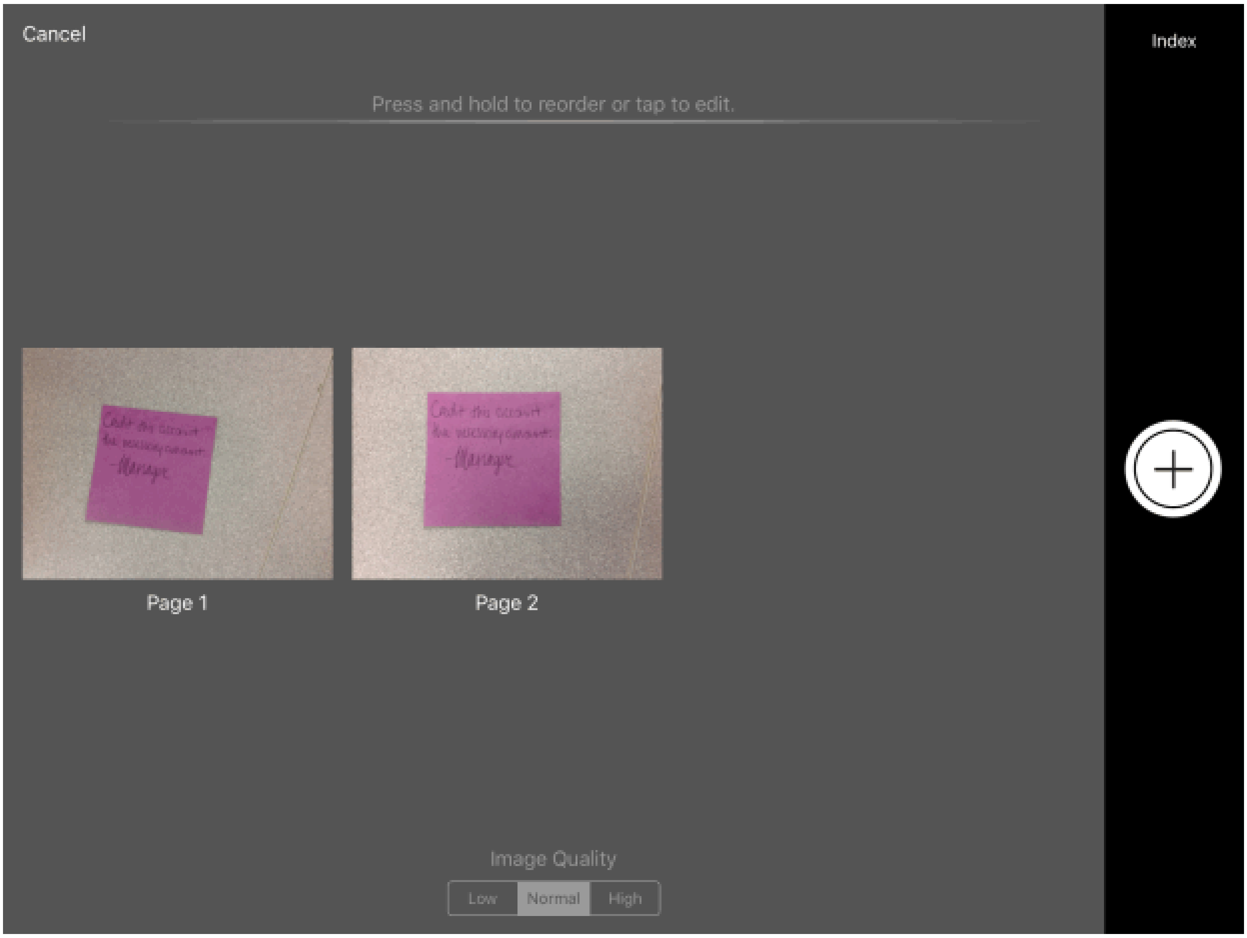
6. When you are finished, tap **Index** in the upper right corner of the screen.
   The indexing panel is displayed:



7. Tap a keyword field to enter a value for the selected keyword. Required keywords are indicated by an asterisk (*). Invalid keywords are highlighted in red and must be corrected before you can continue uploading the document.
   - To add another value for a Keyword Type, tap the **Add (+)** button to the right of the keyword field.
   - To clear out a value for a Keyword Type, tap the **X** in the keyword field.
   - To clear all of the entered keyword values and start over, tap the **Clear** button at the bottom of the keyword panel, then tap **OK** to clear the keyword fields.
8. Once you are finished entering keyword values, tap **Submit** to upload the new document.
   When the new document is finished uploading, you are returned to the Upload screen.

Editing Mode

Editing mode is accessed by first selecting an image in the page list. The following screen shot shows an example of several images in the page list:



While in editing mode, you can delete, replace, or edit images before indexing and uploading them. You can also adjust the image quality of photos taken with the camera before uploading them. See the following topics for information:

- Adjusting Image Quality on page 71
- Deleting an Image on page 72
- Replacing an Image on page 72
- Editing an Image on page 73

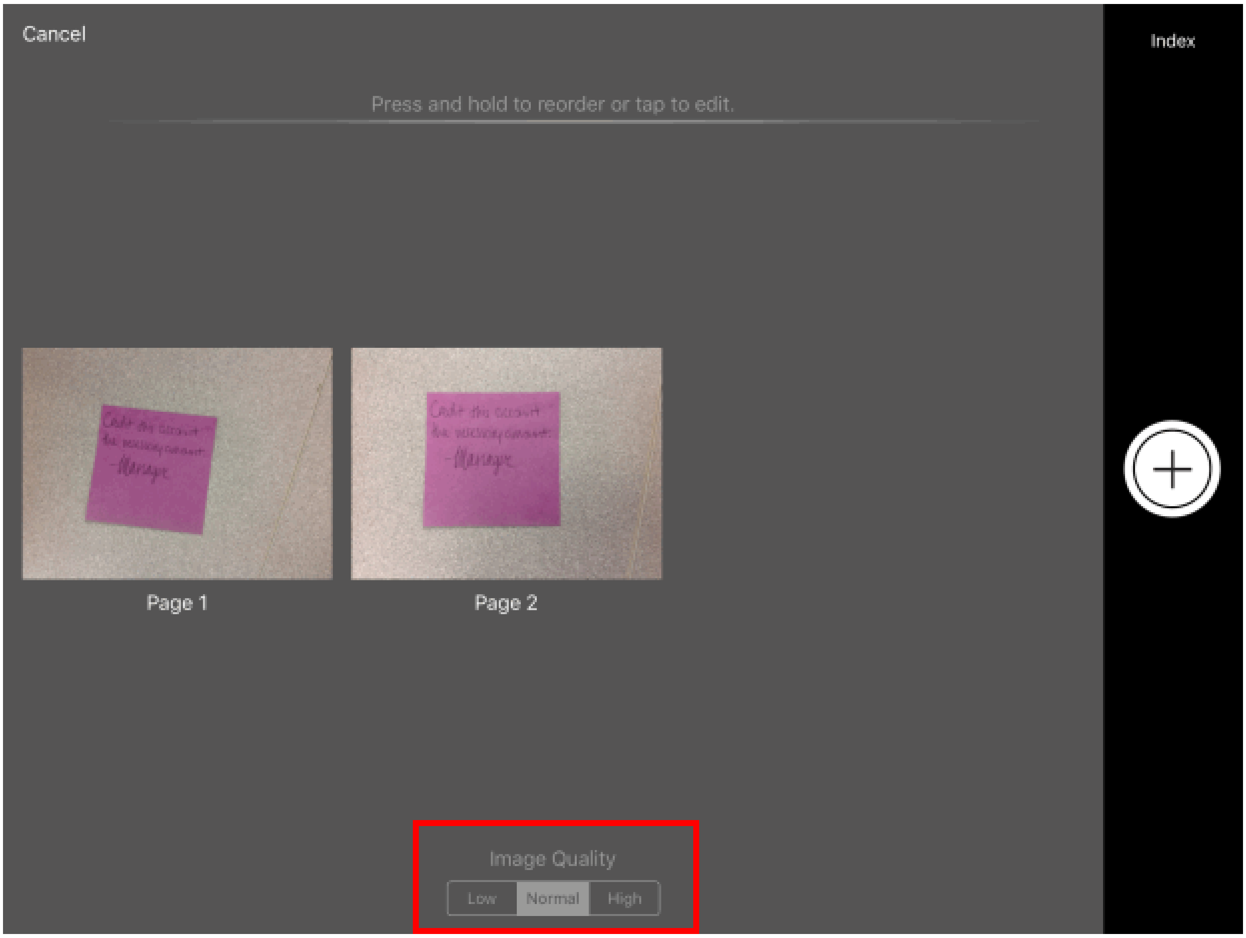
Adjusting Image Quality

You can adjust the overall image quality of photos captured by the device's camera before you index and upload the document to OnBase.

Note: Image quality can only be adjusted for photos captured by the device's camera. If a combination of camera photos and images from the Photos app are selected for upload, you can still adjust the image quality, however only the image quality of the camera photos is affected.

By default, images are uploaded at **Normal** quality. To adjust the image quality of photos before uploading, perform the following steps:

1. Locate the **Image Quality** selector in the page list:



2. Select one of the following options:

Option	Description
Low	Select **Low** to upload photos at low quality. This option stores images at 200 DPI. This option may be best suited for a quicker upload speed, or if data transfer or bandwidth is a concern.
Normal	Select **Normal** to upload photos at normal quality. This option stores images at 250 DPI.
High	Select **High** to upload photos at high quality. This option stores images at 300 DPI.

Note: Your image quality selection is saved for all OnBase users that log in from the device. The image quality selection is saved until you or another user changes the setting.

3. After selecting an image quality option, you can check the image quality by selecting a photo from the page list. If you are unsatisfied with the quality of the image, tap **Page List** to return to the page list and select a different image quality option.

Deleting an Image

To delete one of the pending images, perform the following steps:

1. Select the image you want to delete by tapping on its thumbnail in the page list. The image is displayed in full view.
2. In the toolbar at the bottom of the screen, tap **Delete**:

3. A message prompt is displayed, asking you to confirm the action. Tap **Yes** to continue deleting the image.

Replacing an Image

To replace one of the pending images, perform the following steps:

1. Select the image you want to replace by tapping its thumbnail in the page list.
2. Tap **Replace** at the bottom of the screen:

3. Several options are displayed.
   - Tap **Images from Camera** to display the camera and replace the image with a new photo.
   - Tap **Images from Gallery** to replace the image with one from the Photos app.

Editing an Image

To edit one of the pending images, perform the following steps:

1. Select the image you want to edit by tapping its thumbnail in the page list.

Note: Image editing is only available for images added via the **Add Images from Camera** option. Images that were added via the **Add Images from Gallery** option cannot be edited within the OnBase app.

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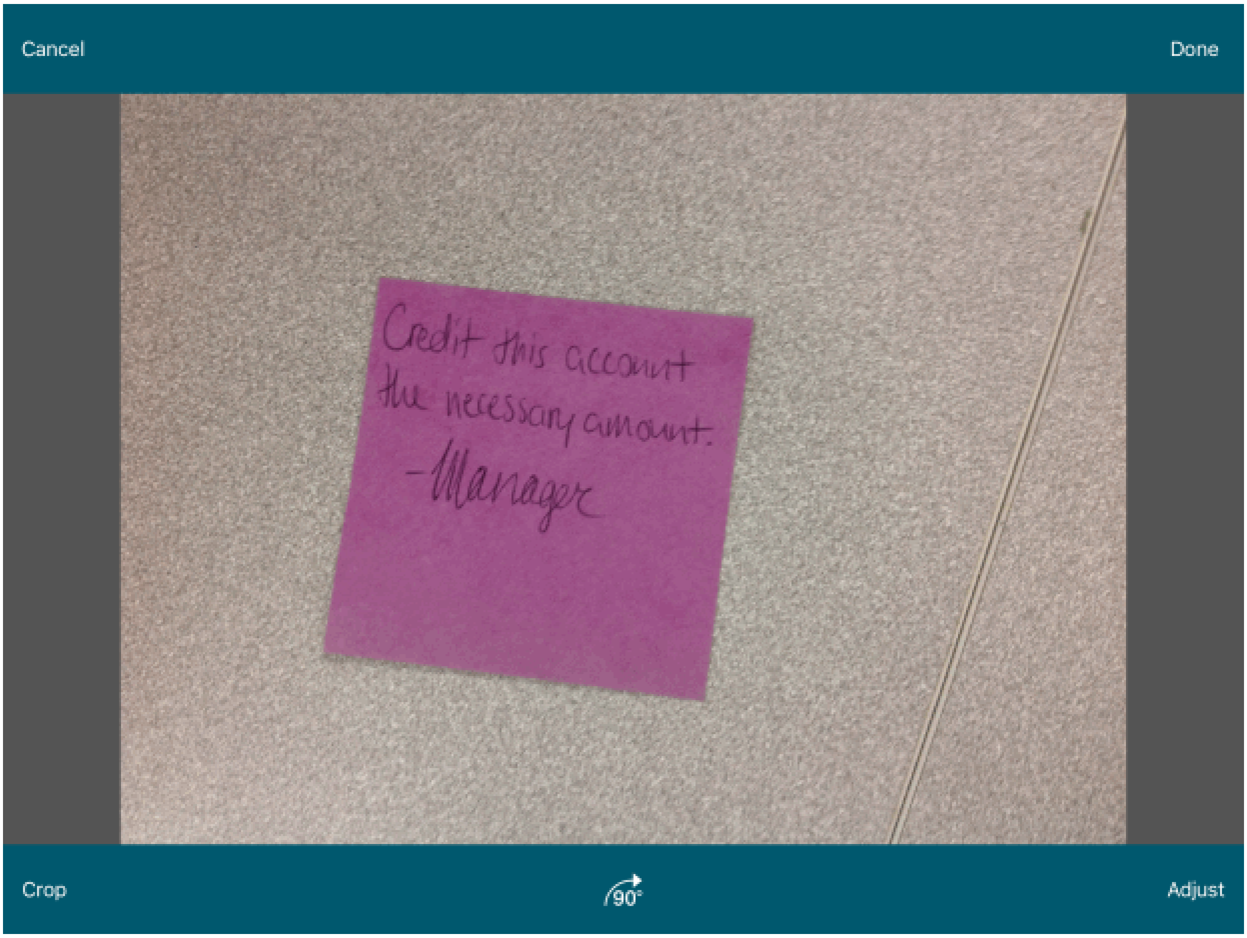
2. Tap **Edit** at the bottom of the screen:

3. The image is displayed on a new screen.



You can edit the selected image in the following ways:

- **Crop an image**
  You can crop an image to make it smaller or to remove portions of the image.
  For information, see Cropping an Image on page 75.
- **Rotate an image**
  You can rotate an image to change the orientation of the image.
  For information, see Rotating an Image on page 78.
- **Adjust the image color, brightness, or contrast**
  You can adjust the image color, brightness, or contrast.
  For information, see Adjusting Image Color, Brightness, and Contrast on page 78.

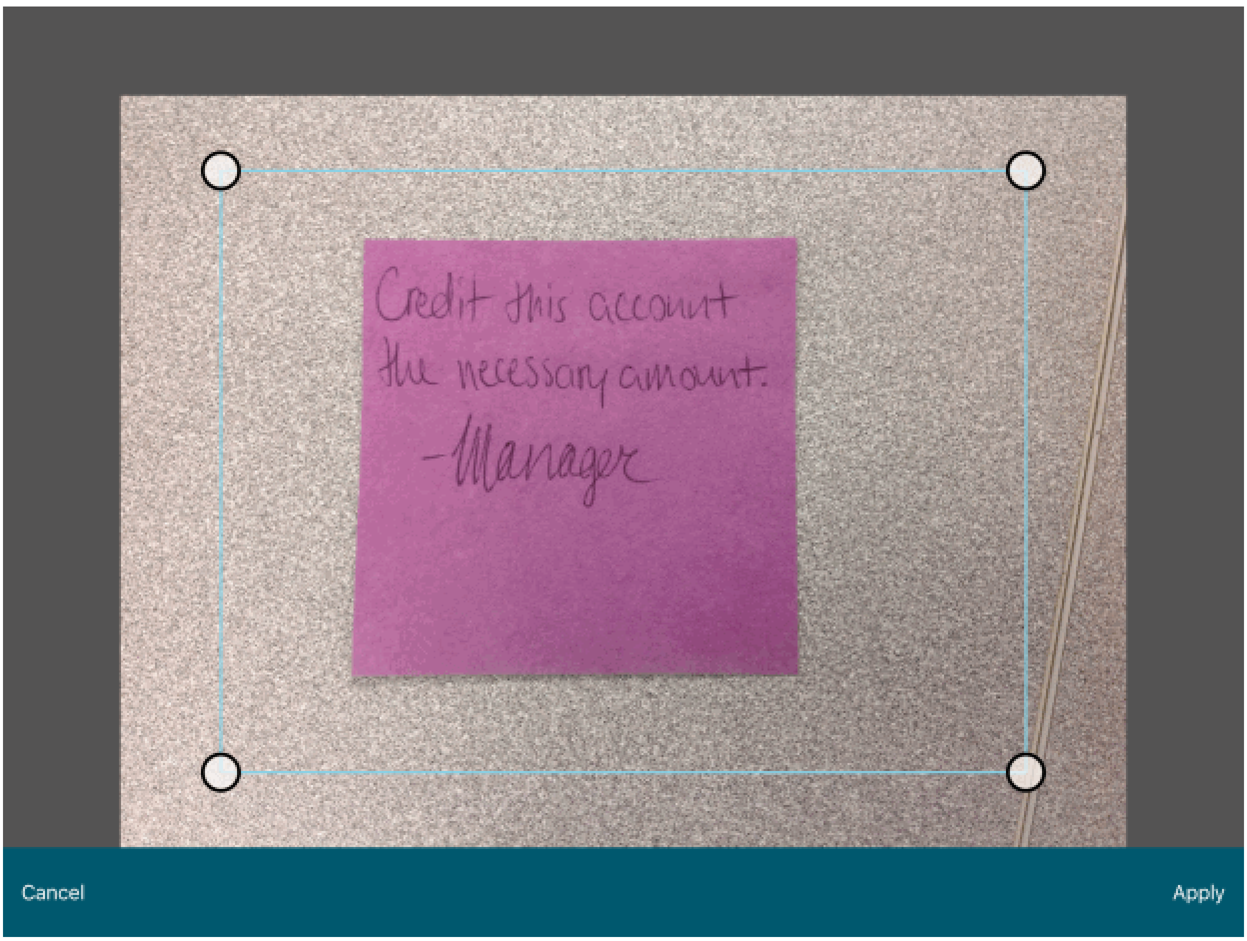
4. When you have finished editing the image, tap **Done** to return to the page list.

Cropping an Image

If necessary, you can crop an image to make it smaller or to remove extra portions of the image. Perform the following steps to crop an image:

1. With the selected image in view, tap **Crop** in the lower left-hand corner of the screen:

   A box displays on the image.



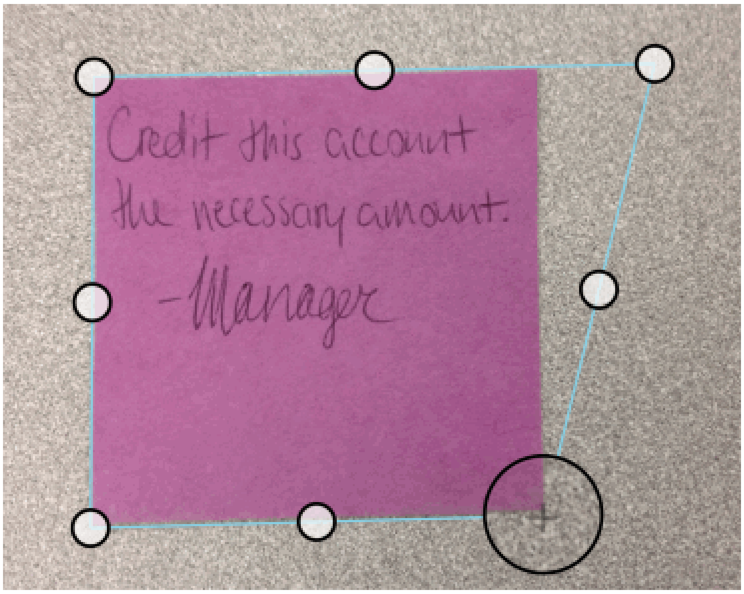
2. Move or resize the box by pressing and dragging the circles so that the area of the image you want to save is displayed within the box.

   Images captured using the **Photo** option in the camera viewfinder can be cropped from four (4) adjustment points, indicated on the box by lightly-colored circles. Because of this, the crop box is limited to a rectangular shape.

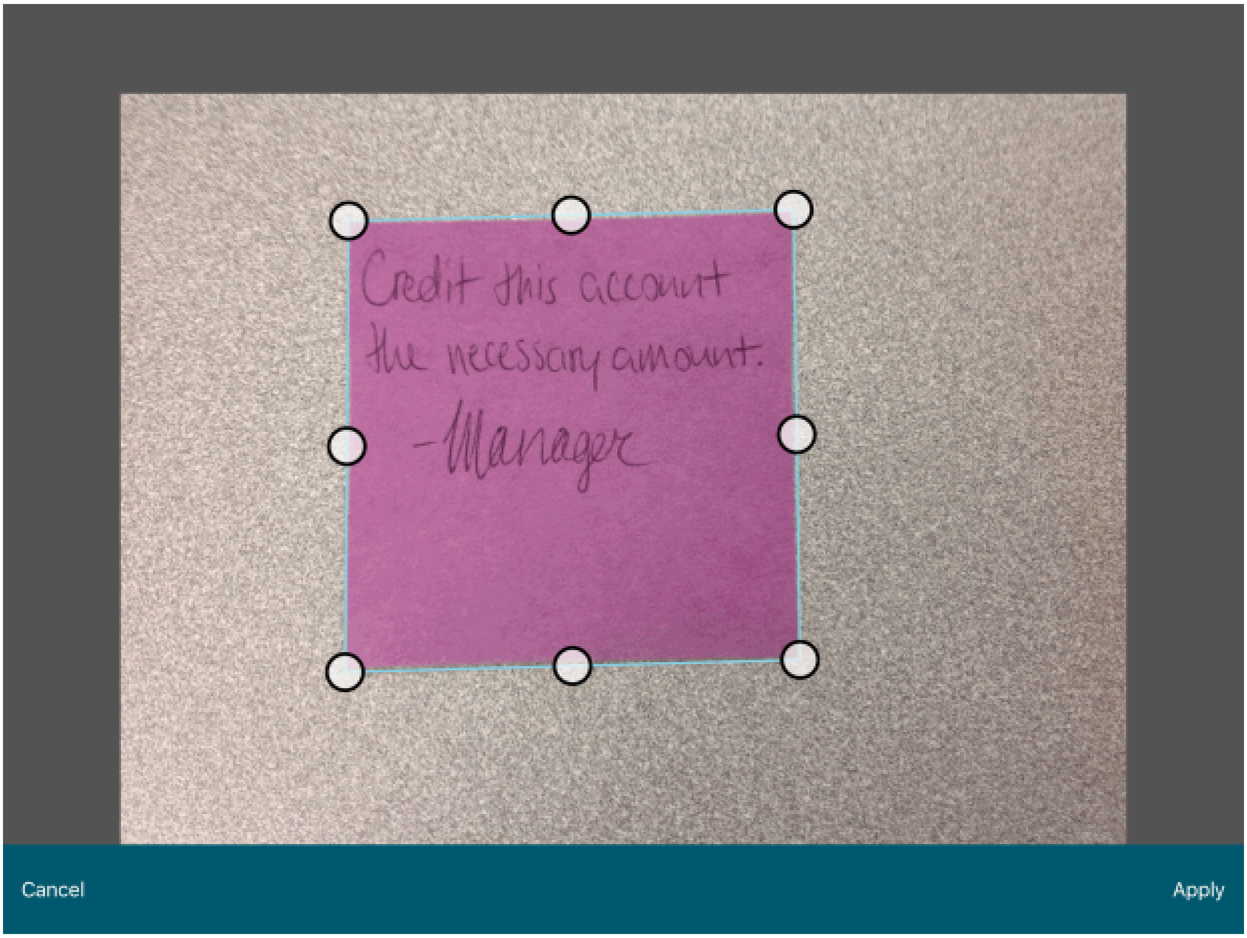
   Images captured using the **Document** option can be deskewed, and the crop box is not limited to a rectangular shape. These images can be cropped from eight (8) adjustment points. This allows you to get as close as possible to the edges of a document if the document captured in the photo is misaligned. When a document is cropped, the cropped image is automatically deskewed and straightened into a rectangular document.

   - To move the box, press and drag the box to the desired location.
   - To resize the box, press and drag a side or corner of the box to the desired position.

- For precise cropping, a magnifier is displayed as you resize the box:



The following example shows an image that is ready to be cropped:

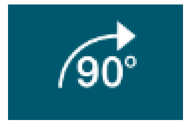


3. When you are ready to crop the image, tap **Apply**.

Rotating an Image

If necessary, you can rotate an image to change its orientation. An image can be rotated clockwise in 90 degree intervals. Perform the following steps to rotate an image:

1. With the selected image in view, tap the following icon at the bottom of the screen:



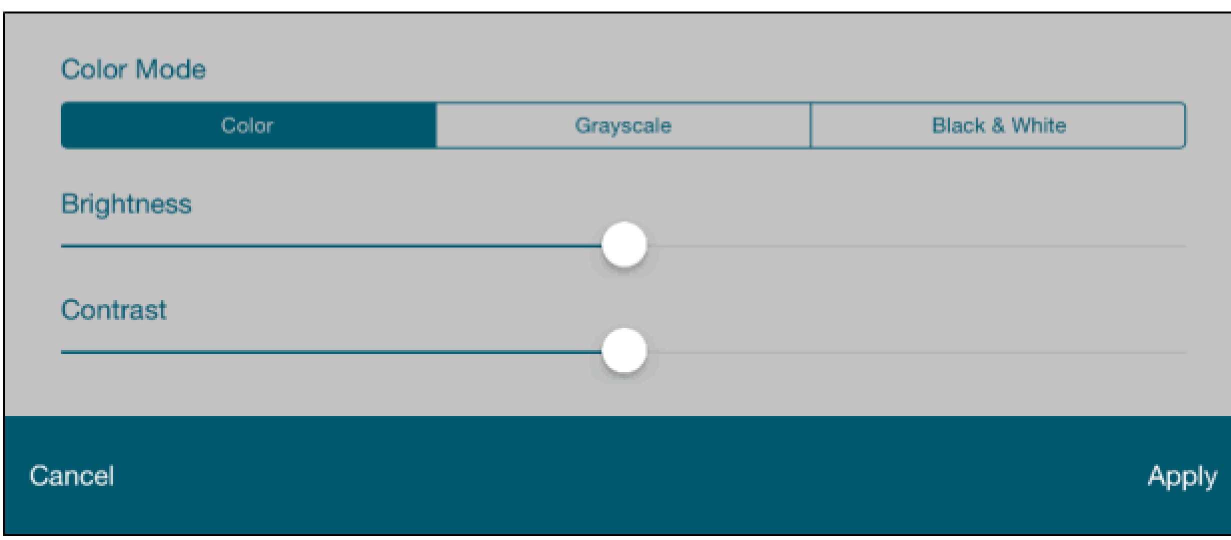
   The image is rotated 90 degrees clockwise.
2. If desired, you can continue rotating the image by tapping the icon again.

Adjusting Image Color, Brightness, and Contrast

If necessary, you can adjust the color, brightness, and contrast of an image. To display these options, perform the following steps:

1. With the selected image in view, tap **Adjust** in the lower right-hand corner of the screen:

   The following pane is displayed at the bottom of the screen:



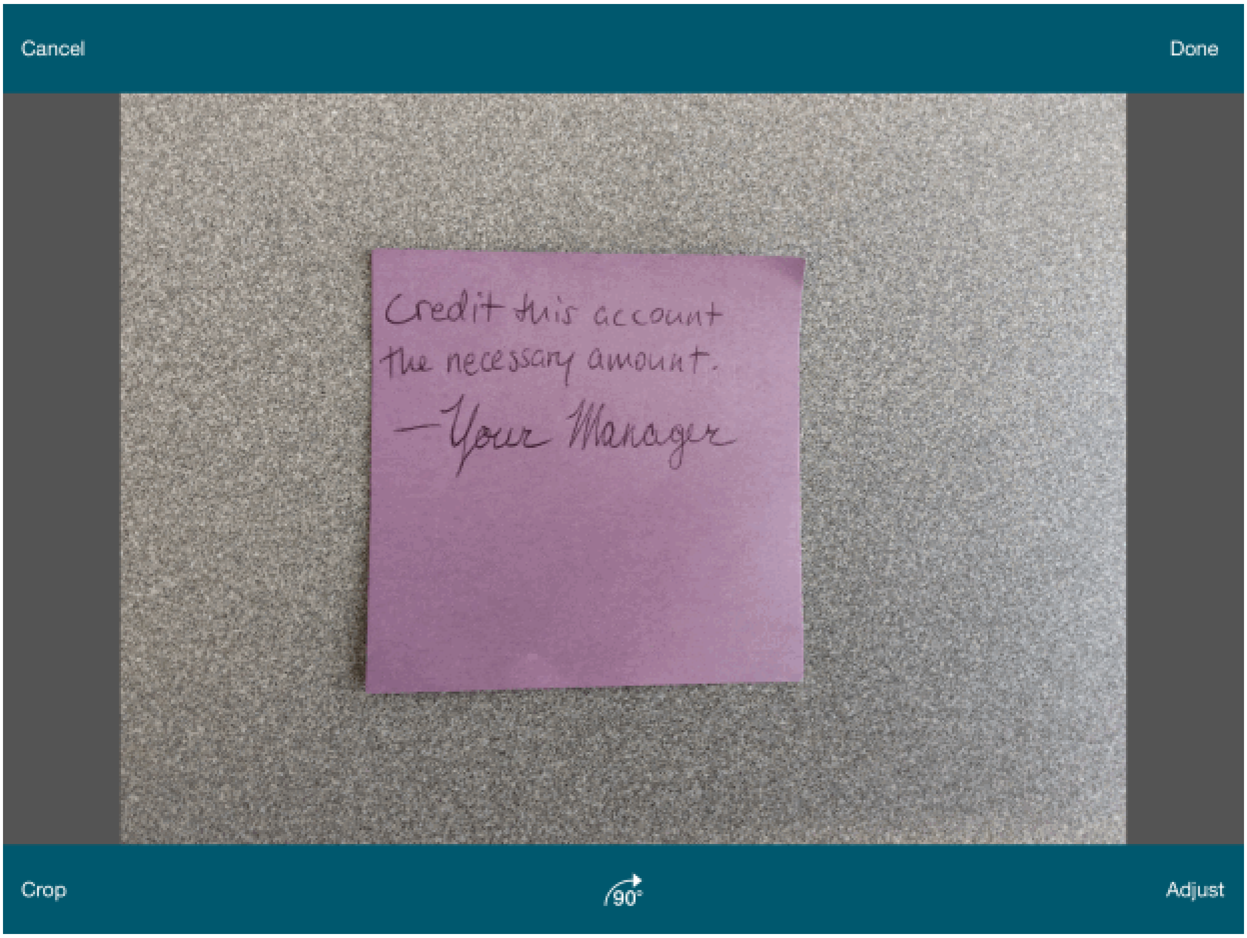
2. Adjust the following options as needed:

Option	Description
Color Mode	Adjust the color mode for the image. Select **Color** if the image should be uploaded as a full-color image. Select **Grayscale** if the image should be uploaded as a grayscale image. Select **Black & White** if the image should be uploaded in black and white. **Note:** You cannot adjust the brightness or contrast of an image if the **Black & White** color mode is selected. To see examples of images with each color mode applied, see the following sections: • Color Mode Example: Color Image on page 80 • Color Mode Example: Grayscale Image on page 81 • Color Mode Example: Black and White Image on page 82
Brightness	Adjust the brightness level of the image. To increase the brightness and make the image lighter, press and drag the slider to the right. To decrease the image brightness and make the image darker, press and drag the slider to the left.
Contrast	Adjust the contrast level of the image. To increase the contrast level, press and drag the slider to the right. To decrease the contrast level, press and drag the slider to the left.

3. When you are finished adjusting these options, or to test the options you selected, tap **Apply**.
   - To make additional modifications, tap **Adjust**.
   - To cancel any changes you have made to the image, tap **Cancel**. You are prompted that leaving the page will discard your changes.

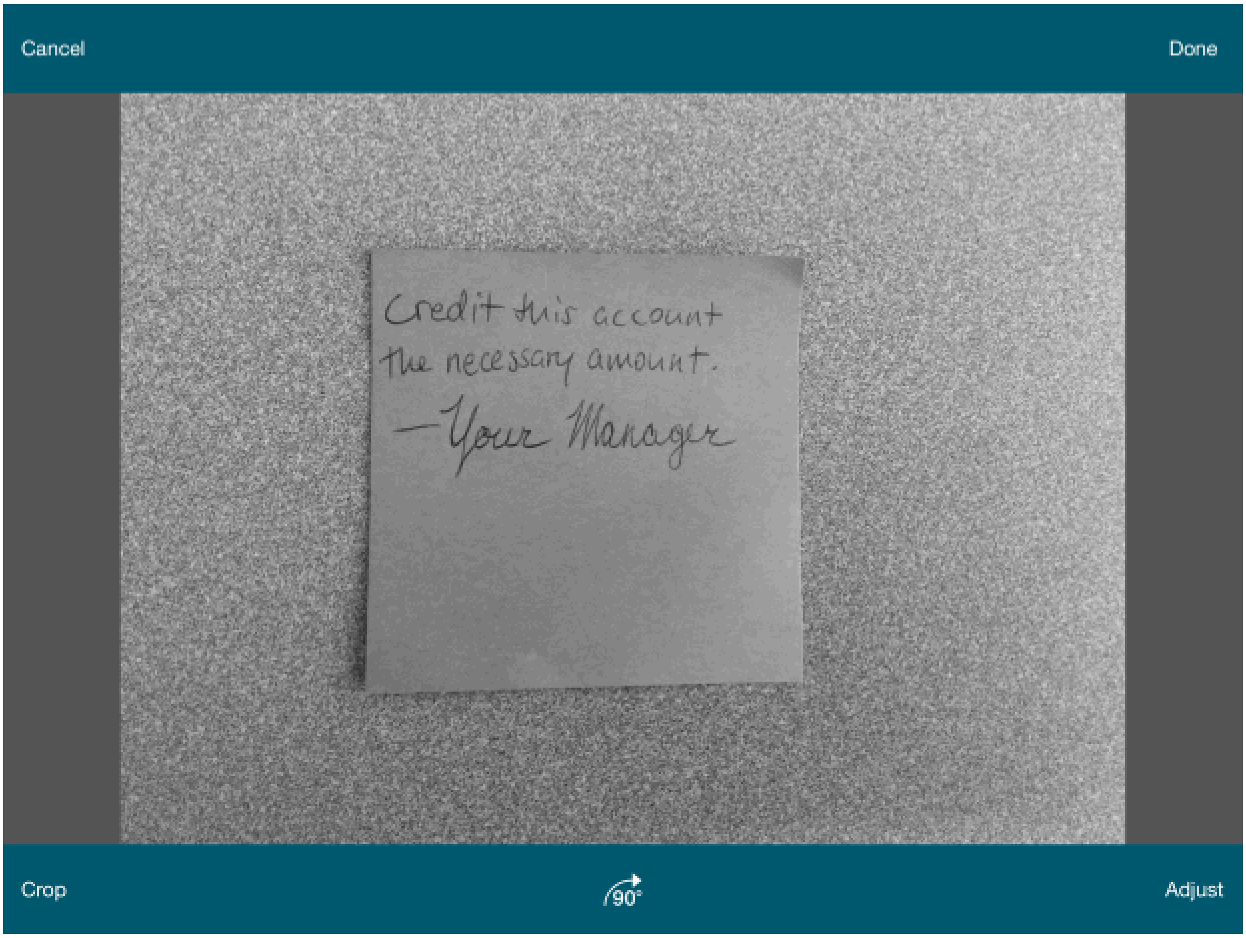
Color Mode Example: Color Image

The following graphic shows an example of an image with **Color** mode selected:



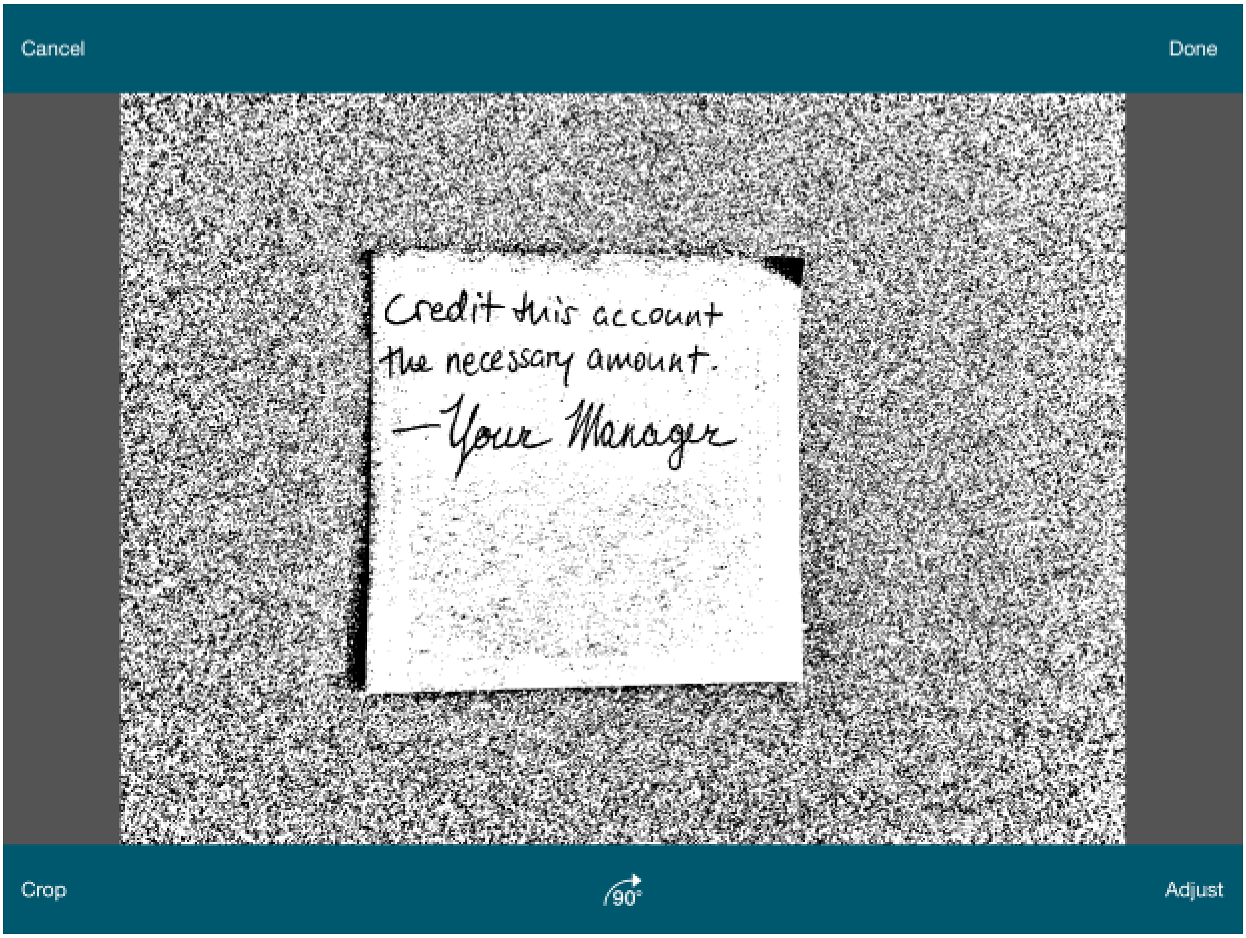
Color Mode Example: Grayscale Image

The following graphic shows an example of an image with **Grayscale** mode selected:



Color Mode Example: Black and White Image

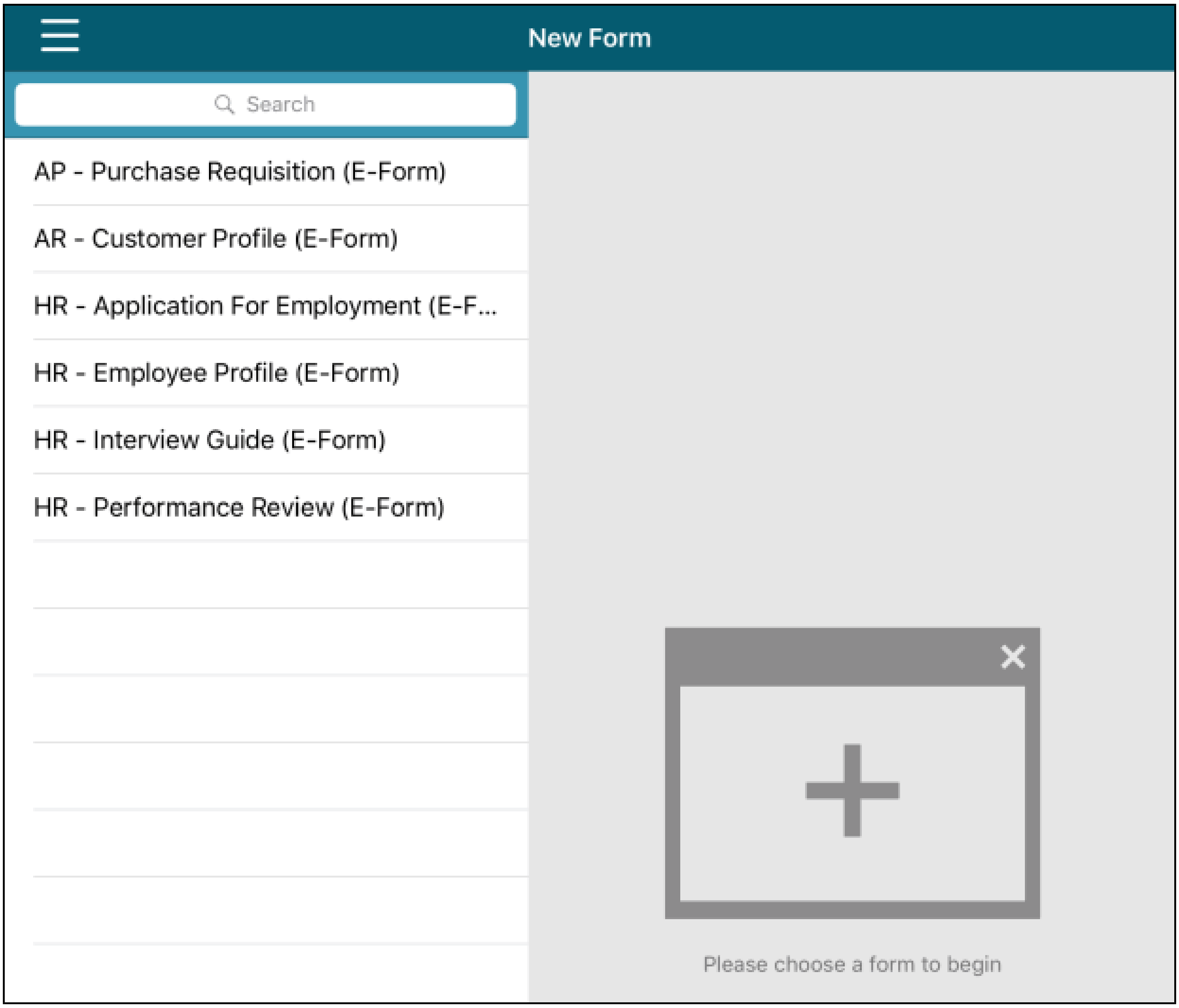
The following graphic shows an example of an image with **Black & White** mode selected:



New Form

The New Form module allows you to create new E-Forms and Unity Forms in OnBase.

The **New Form** module is displayed after selecting **New Form** from the navigation menu. You can create E-Forms and Unity forms if you have appropriate rights for creating and importing documents.



The New Form screen displays the available E-Forms and Unity Forms that you can create. Forms are organized alphabetically.

Tip: You can use the search box in the upper left corner of the screen to narrow down a long list of available forms. Start entering text contained in the title of the form you would like to create.

See the following topics for additional information about working with forms:

- Creating a New Form on page 84
- Working With Unity Forms on page 107

Creating a New Form

To create a new form, perform the following steps:

1. On the **New Form** screen, tap on the form you want to create.
   The form is displayed on a new screen.
2. Fill out the necessary information on the form.
3. When you are finished filling out the form, submit the form.
4. After submitting the form, you may be prompted to create another new form. Tap **Yes** to create a new form of the same type. Tap **No** to return to the **New Form** screen.

Additional functionality is available when you are creating Unity Forms. For information on Unity Form functionality, see Working With Unity Forms on page 107.

Managing Locks

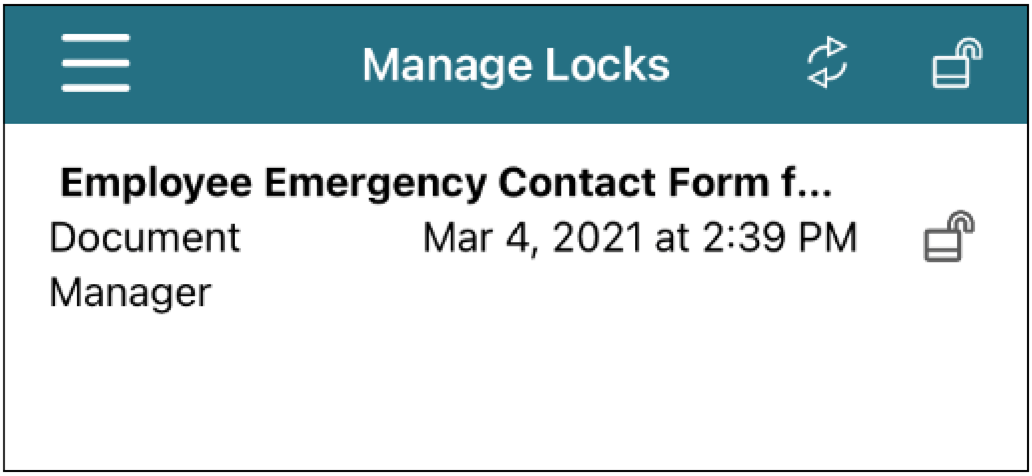
If there are any objects locked by your user account, the following notification displays at the bottom of the screen upon logging in:

You have locks that can be administered from the Manage Locks Module.

Locks can occur if you have documents open when OnBase closes unexpectedly, for example.

To clear locked objects:

1. In the app menu, select the **Manage Locks** module.
   A list of locked objects is displayed:

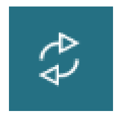


Each item in the list shows the name of the locked object, type of object, the user that locked the object, and the date and time that the lock was created. In the example above, the Employee Emergency Contact Form document is locked by the Manager user on March 4th, 2021 at 2:39 P.M.

2. To clear the lock, tap the Unlock icon next to the locked object:

3. If there are multiple locks, to clear all locks, tap the Unlock icon at the top of the screen:

4. To refresh the Manage Locks screen, tap the Refresh icon:



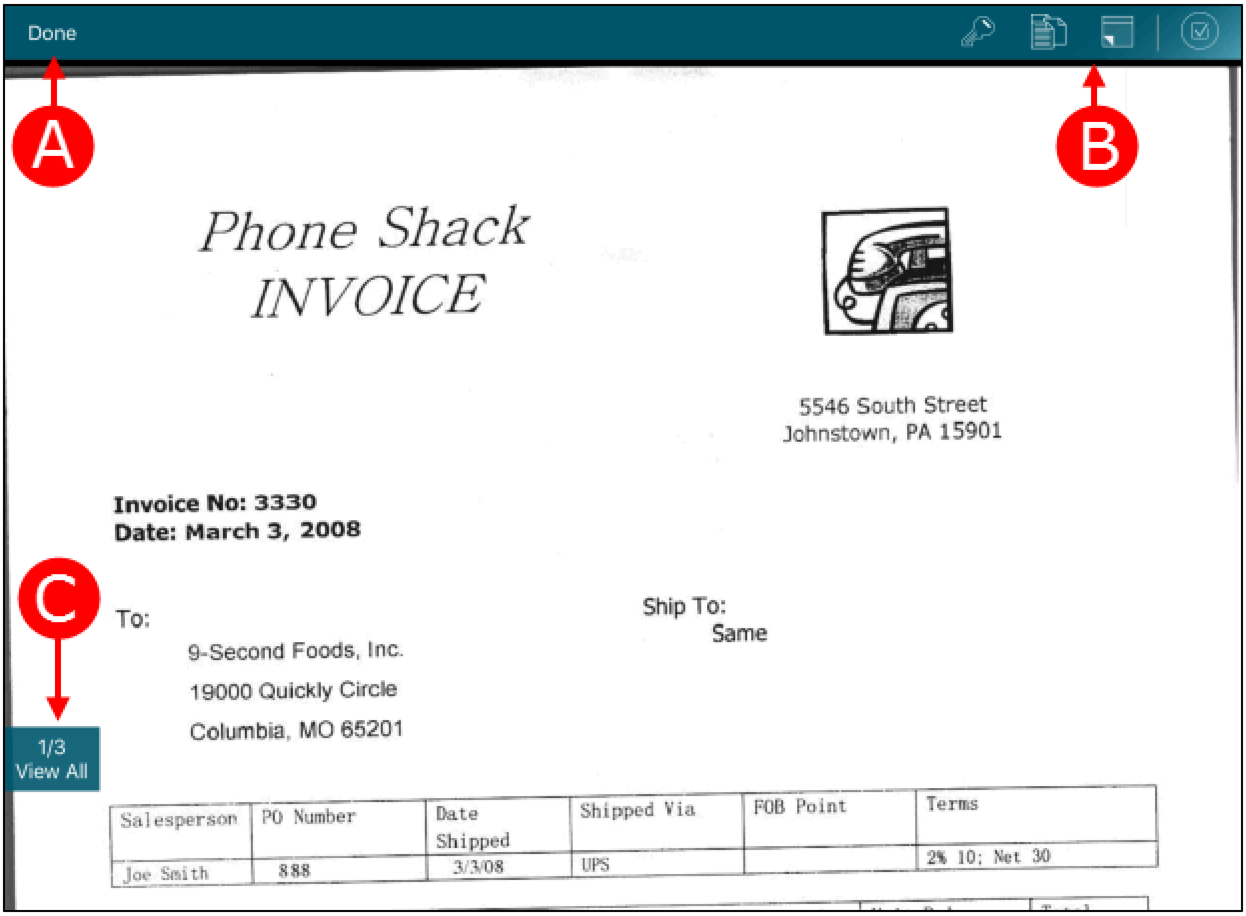
Working With Documents

See the following topics for information related to working with documents in the OnBase Mobile Access for iPad app.

- Viewing Documents on page 86
- Document Viewer Gestures on page 88
- Viewing Page Thumbnails on page 88
- Retrieving Cross-Referenced Documents on page 89
- Navigating a PDF Document Using Bookmarks on page 89
- Signing an Image or PDF Document on page 90

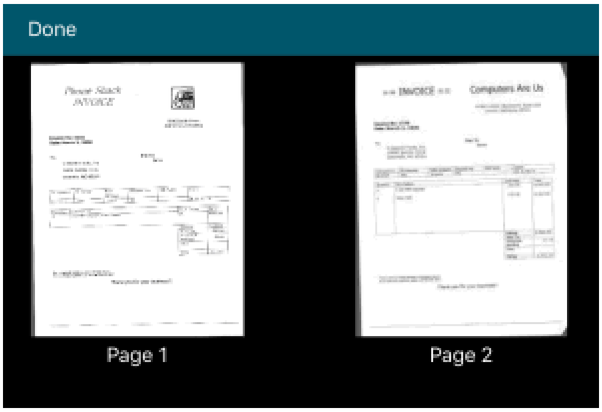
Viewing Documents

To view a document, select the document from a list of available documents. The document viewer is displayed.



The letters in the screen shot above correspond to the letters in the following table:

Label	Description
A	**Done** Tap **Done** to close the document viewer and return to the previous screen.
B	**Document Viewer Toolbar** This is the document viewer toolbar. If you have rights to certain functions, additional icons will display here. The available options also depend on which module you are currently working in. For example, the **Tasks** icon is only available in the **Workflow** module. **Tip:** To temporarily hide the toolbar while viewing documents, tap once on the document. Tap once more to display the toolbar again.

<table>
<tr><th>Label</th><th>Description</th></tr>
<tr><td>C</td><td>Page Count
This is the page count. The page count is displayed on image documents that have more than one page. The number of the currently displayed page is displayed on the left, and the total number of pages is displayed on the right.
The page count is displayed while scrolling through the pages of a document.
To show or hide the page count, tap the document.
Tap the page count to display the thumbnail viewer. The thumbnail viewer displays all of the pages of a document as a list of thumbnails.


This allows you to navigate to a specific page more easily than if you were to manually scroll to it from within the document viewer.
To exit the thumbnail viewer, select a thumbnail.</td></tr>
</table>

Document Viewer Gestures

You can use certain gestures to perform certain interactions with documents. The following list describes functions you can perform while viewing documents in the document viewer, and the gestures you can use to perform these functions.

Zooming In and Out

- You can quickly zoom in or out on a document by pinching your fingers together or apart across the screen.

Scrolling Between Pages

- You can easily scroll between the pages of a document by dragging your finger from the bottom of the screen to the top of the screen, or vice versa.

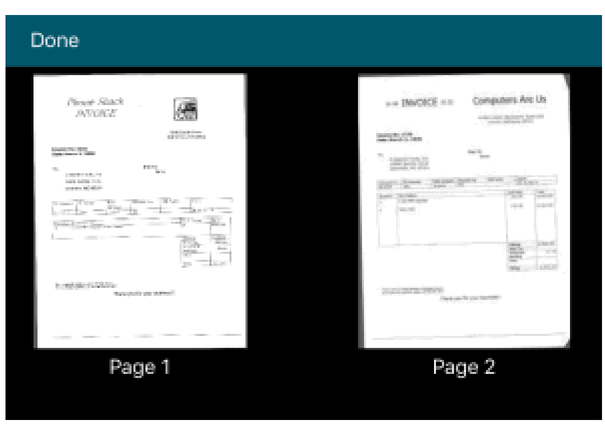
Panning Across a Document

- You can pan across a document by tapping and holding down on the screen, then dragging your finger up, down, left, or right.

Viewing Page Thumbnails

In addition to scrolling between pages of a document, you can use the thumbnail viewer to easily navigate to a specific page of a document. To access the thumbnail viewer, tap the page counter or **View All** in the lower left corner of the screen:

The thumbnail viewer for the document is displayed:



Tap on the page you want to view. You will be taken directly to that page of the document.

Retrieving Cross-Referenced Documents

If cross-references have been set up by your system administrator, related documents can be automatically retrieved from an open document. To view cross-referenced documents, perform the following steps.

1. From the document viewer, tap the Documents icon.

   A list of related and/or cross-referenced documents is displayed.
2. Under the **Cross Reference** header, tap a document from the list to view it. The document is displayed.
3. When you are finished viewing the cross-referenced document, tap the back icon to return to the previous document.

Navigating a PDF Document Using Bookmarks

If a PDF document contains bookmarks, you can use them to navigate the document. To view the document's bookmarks, tap the following icon:

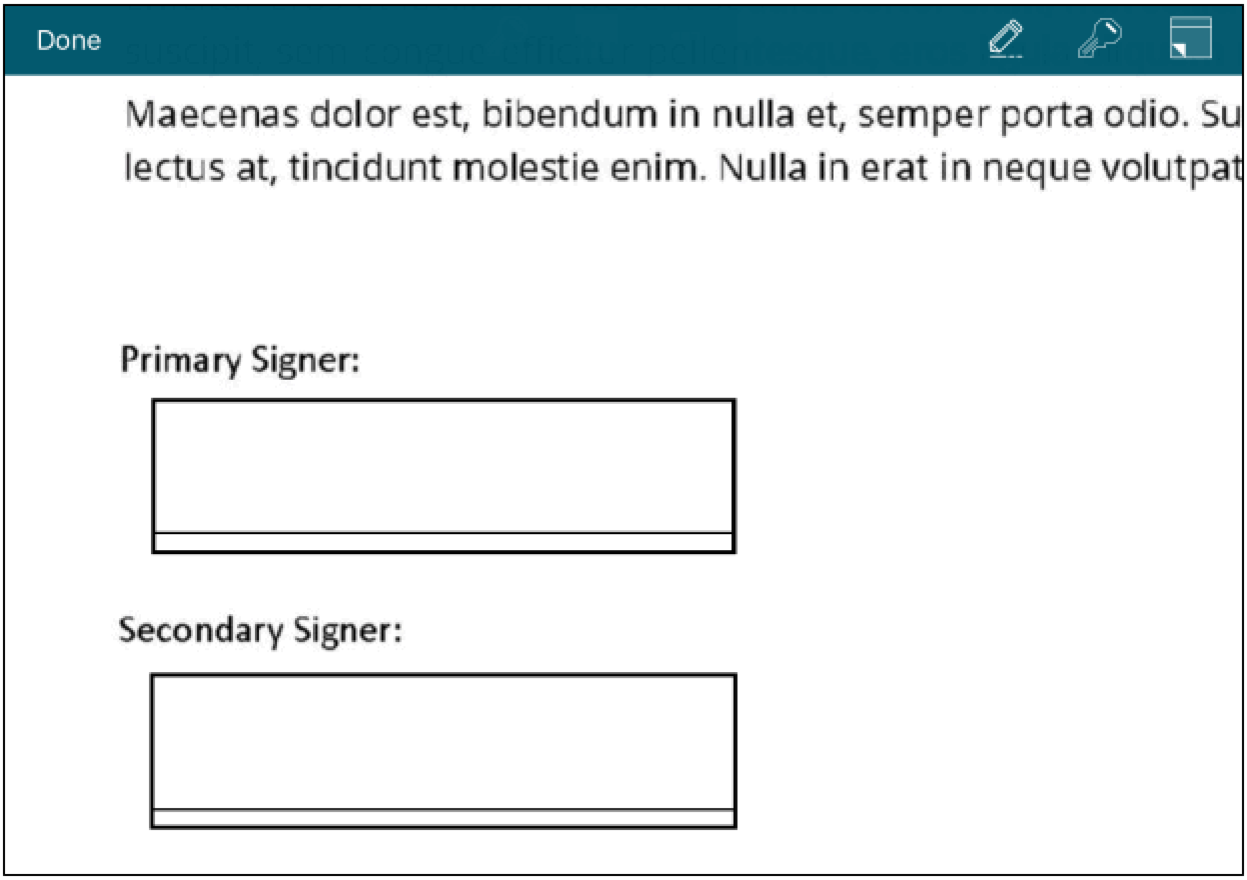
The **Bookmarks** dialog box is displayed. Scroll to the bookmark you want to navigate to and tap to select it. The document viewer automatically navigates to the bookmarked page.

Signing an Image or PDF Document

Depending on your configuration, you may be able to sign an image or PDF document that contains a pre-configured signature field.

Note: To sign PDF documents, the PDF Framework license is required.

The following example shows part of an image document that contains signature fields:



To sign an image or PDF document:

1. While viewing the document, do one of the following:
   - Tap the **Template Signatures** icon:

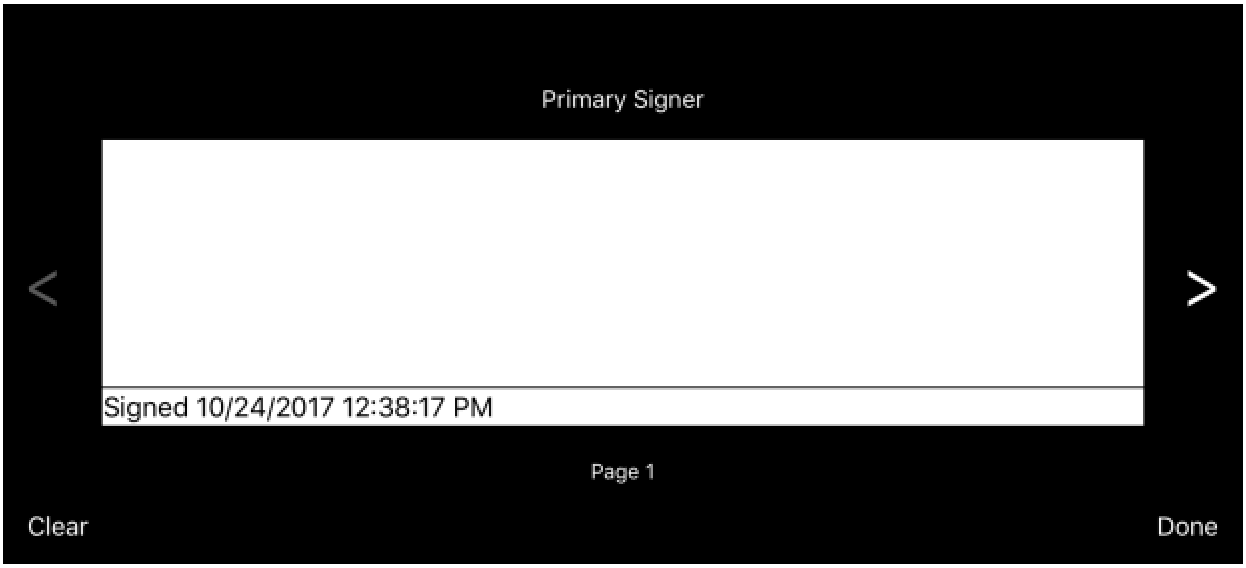
   - Tap the ellipsis (**...**) icon and select **Template Signatures**.

   The **Signatures** window is displayed:

   The **Signatures** window displays a list of signature fields you can sign on the current document. If you have already added a signature by tapping directly on a signature field displayed on the document, a check mark icon is displayed to the left of the signature field name.

2. Tap the name of the signature field you want to sign.

   A signing interface is displayed on the document:



Tip: You can also tap directly on a signature field displayed on the document to display the signing interface.

3. Sign the designated area using a stylus or your finger.
4. If the document contains more than one signature field, tap the left or right arrow icons to navigate between signature fields.
5. If you need to clear the contents of a signature field, tap **Clear**.
6. When you are finished signing, tap **Done**.

   After all signature fields are signed, the signatures on the document must be saved. If the document is revisable, the signature is permanently burned to a new revision of the document upon saving.
7. To save the document, repeat step 1 to display the **Signatures** window.
8. Tap **Finish Signing**.

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

The signatures are saved to the document. If the document is not configured for revisions, a new document is created with the signatures permanently applied. After the signatures are saved, a confirmation is displayed briefly and you are returned to the document screen.

Working With Keywords

See the following topics for information related to working with keywords in the Document Search and Upload modules.

Accessing Document Keyword Values

While you are viewing a document, you can access the document's keyword values by tapping the Keywords icon in the document viewer toolbar.

When you tap this icon, the document's keywords are displayed:

The Keywords pop-up displays a list of all of the document's keywords and their indexed values. For keywords that don't have an indexed value, the phrase **empty keyword** is shown. If a document has many more keywords that can't all be displayed on the screen at once, the list is scrollable so you can view them all.

Note: When you are viewing a document's keywords, all keyword values are read-only and cannot be modified within the OnBase Mobile Access for iPad app.

Masked Keywords

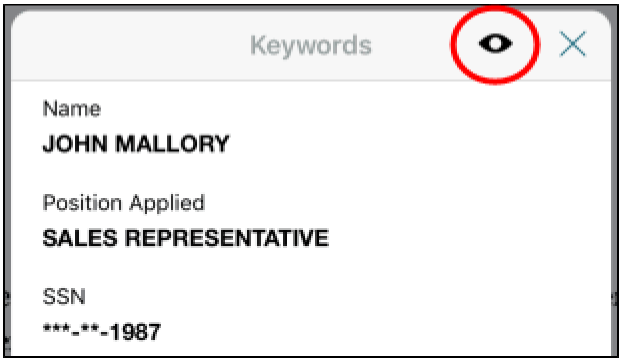
Masked Keyword Types must have values entered in a specific format, called a mask format. Fields for masked Keyword Types prohibit you from entering values that do not satisfy the mask format.

For example, a masked Keyword Type for Social Security Numbers may contain dashes as static characters and allow users to enter only nine numeric characters. In Mobile Access for iPad, the dashes will automatically display within the masked fields.

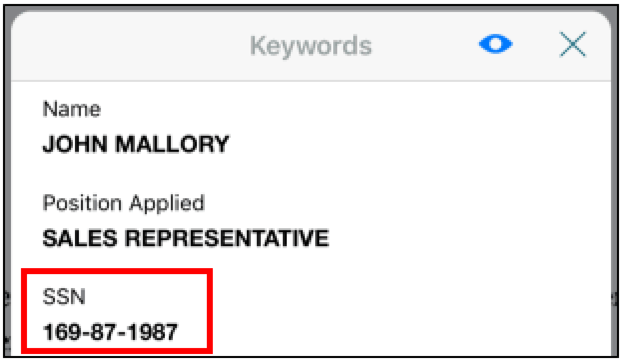
When you enter a keyword value into a masked Keyword Type field (e.g., while indexing keywords in the Upload module), OnBase automatically validates the keyword value to make sure it satisfies the masking constraints. Contact your system administrator if you have questions about a Keyword Type's mask format configuration.

Security Masked Keywords

With additional privileges, while viewing a document, you may be able to view keywords that have a security mask configured. When a security mask is configured, a portion of the Keyword Type, or the entire Keyword Type, is hidden by the configured mask. If a document contains Keyword Types that have a security mask applied, an eye icon is displayed in the Keywords dialog box:



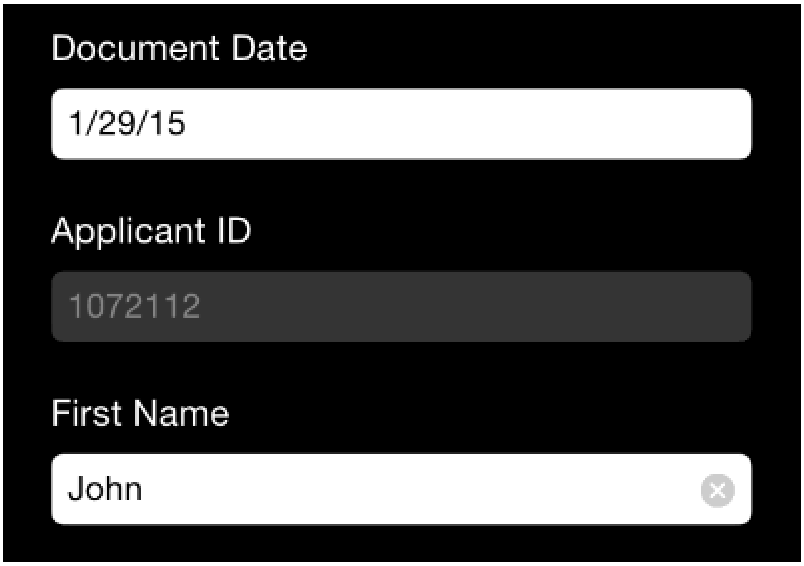
To view the Keyword Value, tap the eye icon. The Keyword Value for the security masked Keyword Type is displayed:



Read-Only Keywords

Sometimes you can view, but not modify, some or all of the Keyword Values on a document during indexing. This can be due to the following reason:

- Keywords can be configured to appear as read-only to certain User Groups. If this is the case, keyword fields when indexing may look like the following example:



In the example above, the **Applicant ID** field is configured as read-only. The field is grayed out and you cannot modify the contents of the field.

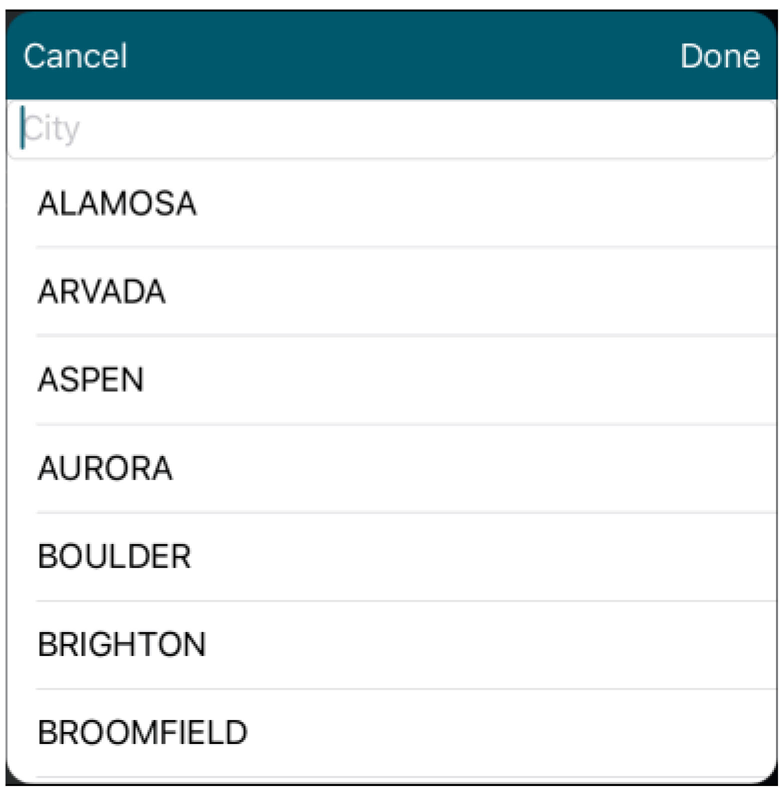
Adding Another Value to a Keyword

You can add another instance of a Keyword Type by tapping the plus (**+**) icon next to the Keyword Type field:

Keywords with Drop Down Select Lists

Some Keyword Type fields have drop-down lists from which you can select a Keyword Value. The following example shows **City** and **State** Keyword Type Fields that are configured to use data sets:

To select a value from a data set, tap the keyword field and then tap **Search** on the keyboard. The following dialog displays:



Tap the value you want to select from the list.

- You can scroll a long list of values.
- You can filter the values available in the drop-down list. Start typing a word or character that is part of the Keyword Value. As you type, the list displays values that match the entered characters.

AutoFill Keyword Set Instances

An AutoFill Keyword Set is a collection of Keyword Values dependent on a Primary Keyword Value. If an AutoFill Keyword Set is assigned to a Document Type, a value entered into the Primary Keyword Type field during indexing of a document triggers the population of the remaining Keyword Types with values from the AutoFill Keyword Set.

When indexing a document containing an AutoFill Keyword Set, follow the steps below:

1. In the Upload module, when the Indexing panel is displayed, enter the value for the Primary Keyword Type and tap outside of the keyword field. The remaining values for the remaining Keyword Types in the AutoFill Keyword Set will populate in their respective fields.

Note: If the Primary Keyword Value is associated with more than one AutoFill Keyword Set, only the first AutoFill Keyword Set is used.

2. Continue entering any remaining keyword values for the document.

Note: If you add multiple instances of the Primary Keyword Type, the OnBase app does not automatically create additional instances of the associated Secondary Keyword Types. You must add additional instances for all Secondary Keyword Types in order to populate them.

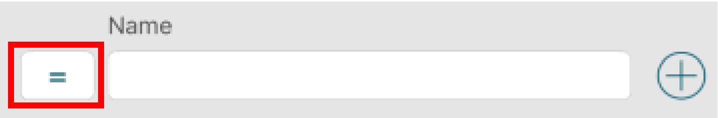
3. When all fields are populated, tap **Submit** to upload the document.

Keyword Operators and Extended Document Search Features

The following topics contain information about additional options you can use to narrow or expand your document search within the Document Search module.

Relational (Comparative) Operators

Relational (comparative) operators allow you to retrieve documents based on a range of Keyword Values, as well as exact Keyword Value matches. When performing a document search, tap the relational operator icon to the left of the Keyword Type field to toggle through the available operators.



Blank Keyword Values on a document are not compared to the Keyword Values provided during document retrieval. If you use the ≠ (does not equal) operator to omit all documents indexed with a specified value, the search will not return documents that were indexed with a blank value. Some documents indexed with Keyword Type Groups may be returned, depending on the Keyword Type Group's configuration.

The following operators may be available to use:

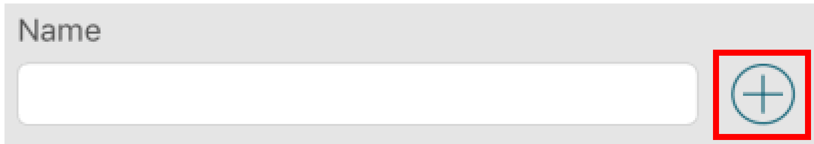
Operator	Description
=	An exact Keyword Value match.
≠	Keyword Values that are not equal to the specified value.
>	Keyword Values that are greater than the specified value.
≥	Keyword Values that are greater than or equal to the specified value.
<	Keyword Values that are less than the specified value.
≤	Keyword Values that are less than or equal to the specified value.
“ ”	The string literal operator used with alphanumeric Keyword Types. Selecting this icon will match the literal string. If a wildcard is used in the string, the search will look for the exact match including the wildcard.

Note: The operators that are available vary depending on the configured Keyword Type. For example, only the **=**, **≠**, and **“”** operators are available for alphanumeric Keyword Types.

Logical (Boolean) Operators

If you have two or more fields for the same Keyword Type, each of these fields is separated from the next by one of the following logical operators: **and**, or **or**. The current logical operator appears to the right of the first of the two Keyword Type fields.

You can create an additional Keyword Type fields by tapping the plus (**+**) icon next to the Keyword Type you want to add:



This automatically inserts a logical operator icon to the right of the original Keyword Type field.

To change the logical operator in use, tap the logical operator icon, which switches between the available options:

Operator	Description
and	Searches for documents containing the Keyword Values preceding and following the logical operator.
or	Searches for documents containing either the value preceding the logical operator or the value following the logical operator.

Note: When you use the **or** operator and one document has both Keyword Values, OnBase retrieves two separate records for that document. For example, you perform a search for the Keyword Values Sarah Adams **or** John Adams. If the same document has both values associated with it, then OnBase displays a record for each occurrence of the Keyword Value (one record for Sarah Adams, one record for John Adams).

If you have more than two Keyword Values for the same Keyword Type, then the logical operators are processed in order of occurrence.

Wildcard Characters

A wildcard character can be used to match Keyword Values where one or more characters are unknown. Wildcards can only be used to match alphanumeric Keyword Values.

Note: Depending on your system’s configuration, some alphanumeric Keyword Types may not allow wildcard characters to be used, or searches that include wildcards may return unexpected results.

Enter one of the following wildcard characters directly into the Keyword Type field to search for text strings containing one or more unspecified characters:

Wildcard	Description
*	The * wildcard character can be used to replace one or several characters of a text string. For example, the text string **Smit*** will find all instances of both **Smith** and **Smithsonian**.

Wildcard	Description
?	The **?** wildcard character can be used to replace a single character in the text string. For example, the text string **SM?TH** will find all instances of both **Smith** and **Smyth**.

Keywords with Drop-Down Lists

Fields for some Keyword Types may contain a drop-down list. Select any value from this list as criteria for document retrieval. Your system administrator determines if a drop-down list appears for a Keyword Type.

Working With Notes and Annotations

Notes and annotations can be placed on documents for other users to see, to call attention to a certain part of a document, or to hide part of a document.

Users with appropriate viewing rights will see notes and annotations on a document.

If you are unable to view or modify notes, you may not have sufficient user privileges. Note characteristics are defined by your system administrator.

The following topics contain information on various ways to interact with notes and annotations in the Mobile Access for iPad.

- Adding and Viewing Notes and Annotations on page 101
- Editing Notes and Annotations on page 104
- Moving and Resizing Annotations on page 105
- Deleting Notes and Annotations on page 106

Adding and Viewing Notes and Annotations

Depending on your configuration, you may be able to view or add notes and annotations to documents. If you have the appropriate rights, the following note and annotation types can be viewed and added to documents:

- Notes
- Arrows
- Ellipses
- Highlights

- Overlapped Text

Note: On image documents that have a high resolution, it may be difficult to see overlapped text annotations on a document. You can still view these overlapped text annotations in the Notes window.

Note: Arrows, ellipses, highlights, and overlapped text annotations cannot be added to E-Forms or Unity Forms.

Adding a Note or Annotation to a Document

In order to add a note or annotation to a document, you must be assigned the appropriate privileges for adding, modifying, or deleting notes. To add a note or annotation to a document, perform the following steps.

1. From the document viewer, tap the **Notes** icon.

   The **Notes** window is displayed.
2. Tap the plus (**+**)icon.

   The **New Note** window is displayed. The New Note screen shows a list of notes and annotations that you have rights to create. The available note types are displayed in alphabetical order.
3. Tap the name of the note or annotation to add it to the document.
4. Enter any text for the note. Depending on your system configuration, you may also see the characters remaining displayed while editing the note.
5. When you are finished adding text, tap the X icon to save and close the note.
   - If you added a text-based note, it is added to the Notes screen.
   - If you added an annotation note type, it added to the Notes screen and displayed on the center of the document. You may also be able to move or resize the annotation on the document. See Moving and Resizing Annotations on page 105 for more information.

Note: Only Annotation note types (e.g., Ellipse, Arrow, Highlight) are dropped directly onto the document. Other note types are added only to the Notes window.

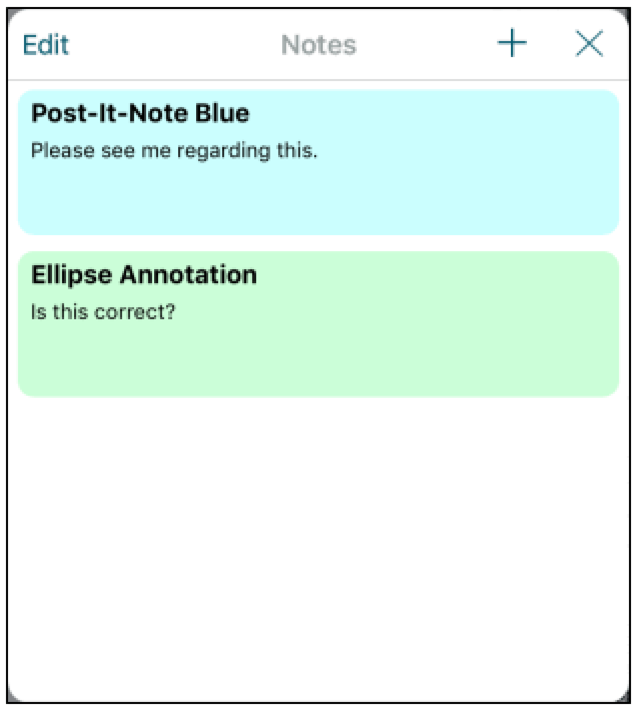
Note: If you don't have privileges to modify a note type that you added, you can still continue to make changes to any notes you've added between the time you logged on and when your session ends. Once your session ends or once you log out, you are no longer able to edit the notes you created unless you have privileges to do so.

Viewing Notes and Annotations

In order to view notes and annotation on a document, you must be assigned the appropriate privileges for viewing notes. To view the notes or annotations on a document, perform the following steps.

1. From the document viewer, tap the **Notes** icon.

   The **Notes** window is displayed.



   The Notes window shows a list of any notes and annotations currently applied to the document. Notes that were created previously are sorted by the date and time they were created.

2. Tap a note to view any note text. Each note contains the following information:
   - The name of the note type
   - Any text that is part of the note
   - The user that created the note
   - The date and time when the note was created

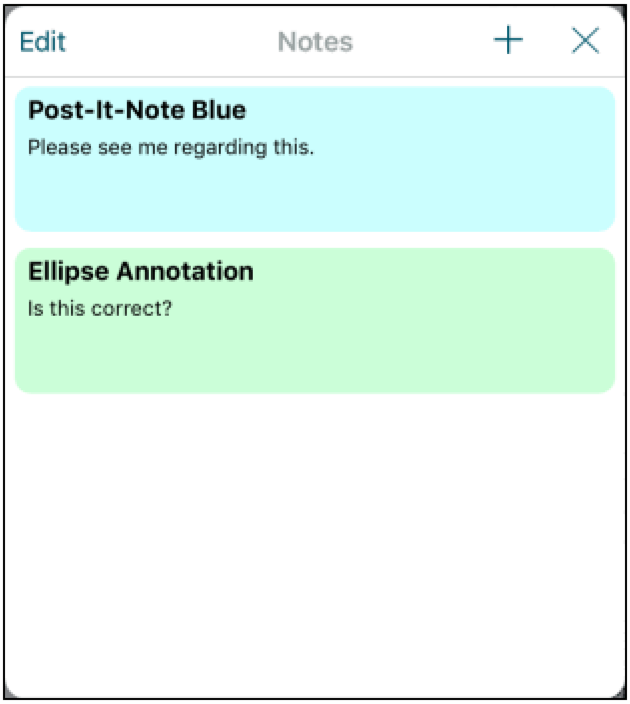
Tip: Tap on an annotation in the Notes pane to quickly jump to the location of the annotation on the document.

Editing Notes and Annotations

In order to edit notes or annotations, you must be assigned the appropriate privileges for modifying notes. To edit a note or annotation on a document, perform the following steps.

1. From the document viewer, tap the **Notes** icon.

   The **Notes** window is displayed.



   The Notes window shows a list of any notes and annotations currently applied to the document. Notes that were created previously are sorted by the date and time they were created.

2. Tap a note to view any note text.

Tip: You can also select annotations for editing by pressing and holding down on them if they are displayed on the document.

3. To edit the note, tap inside the note text area and make changes to the text. As soon as you tap away from the note, any changes you made are saved.

   Depending on your system configuration, you may also see the characters remaining displayed while editing the note.

4. When you are finished editing the note text, tap the X icon to save and close the note.

Moving and Resizing Annotations

In order to move or resize an annotation on a document, you must be assigned the appropriate privileges for modifying notes, and the note type must be movable.

1. From an open document, press and hold on top of the annotation you want to move or resize. The annotation becomes selected.

Note: If you are unable to select a note, then you may not have rights to modify and move it.

2. To move the selected annotation, drag it around the document to move it to a new location. Tap anywhere on the screen when you are finished moving it.

Tip: You can also move annotations between pages.

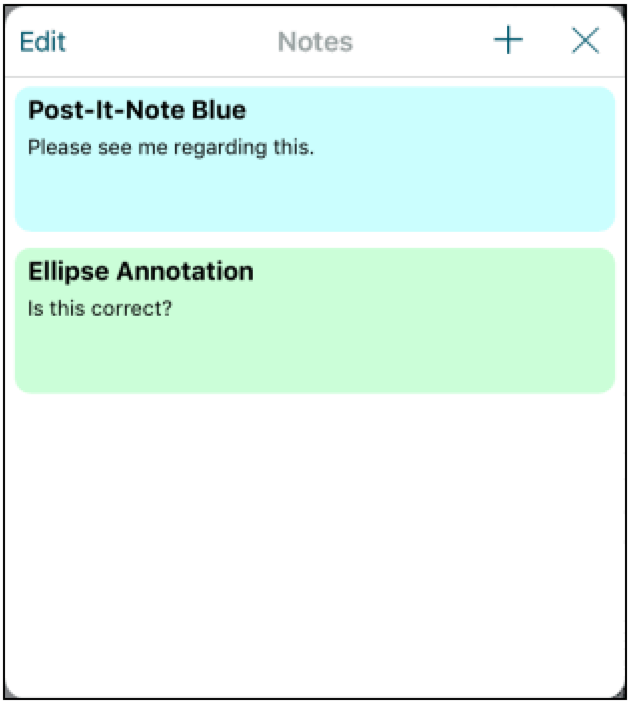
3. To resize the selected annotation, drag the grippers in each corner of the annotation until the desired size is reached. Tap anywhere on the screen when you are finished resizing the annotation.

Deleting Notes and Annotations

In order to delete a note or annotation on a document, you must be assigned the appropriate privileges for deleting notes. To delete notes and annotations, perform the following steps:

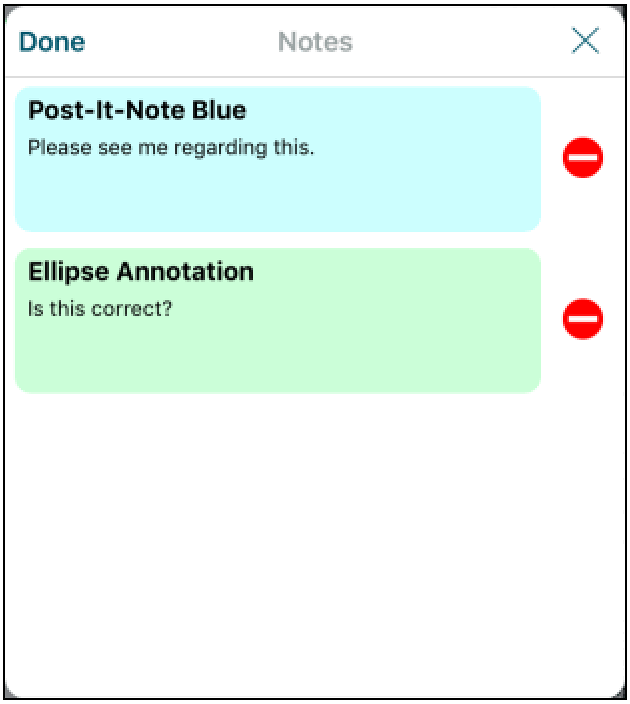
1. From the document viewer, tap the **Notes** icon.

The **Notes** window is displayed.



2. Tap **Edit**.

3. Tap the icon next to the note or annotation that you want to delete:



   A prompt displays, asking if you are sure you want to delete the note.
4. Tap **Delete** to delete the note. The note is deleted and removed from the notes list.

Tip: You can also delete annotations that are currently displayed on the document by pressing and holding down on them and tapping **Delete Note** at the bottom of the screen.

5. When you are finished, tap **Done**.

Working With Unity Forms

The following topics describe the features and actions that may be available to you when completing a Unity Form.

Note: In the following topics regarding Unity Forms, the **click** action is assumed to be synonymous with the **tap** action on your mobile device.

Validating Data in Forms

Data is validated in forms to ensure that the data entered in the form is in the expected format.

The value of a field is validated upon leaving it after entering data by pressing the **Tab** key or by clicking in a new field. When a field's value is not valid, a red border is displayed around the field. If you click in an invalid field, information about why the value in the field is not valid appears next to the field.

Upon clicking **Submit** on a form, all the values in all the fields on the form are validated. If any field contains an invalid value, a notification bar appears directly above the form that displays the name of the invalid field or fields and the reason why the value in the field or fields is invalid next to the field name. The form cannot be submitted until the values in the invalid fields are no longer invalid.

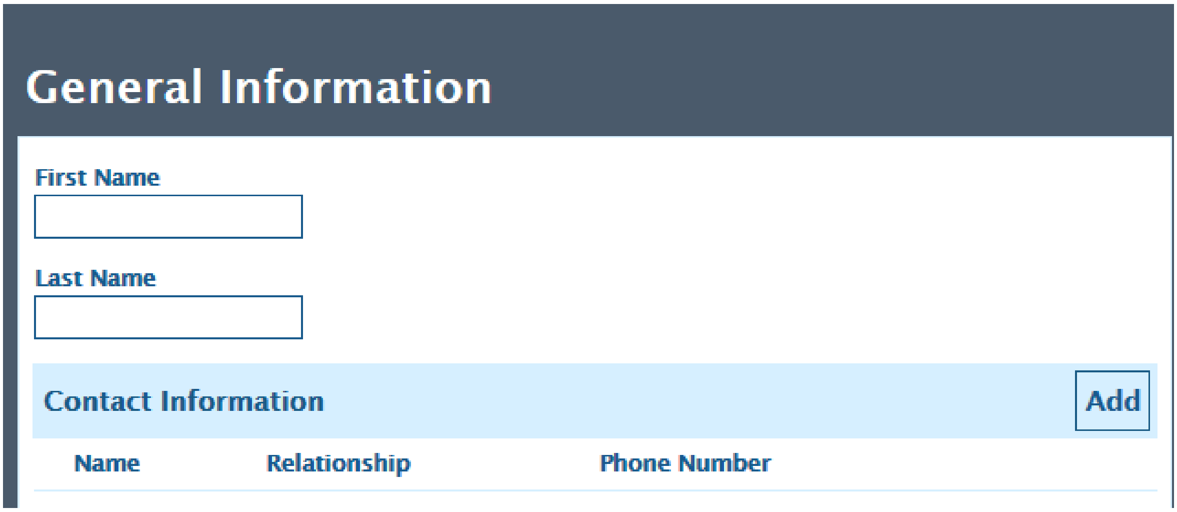
Tip: You can click on the name of an invalid field in the notification bar to navigate to that field and to display a message explaining the reason why the field is invalid.

Using Repeating Sections

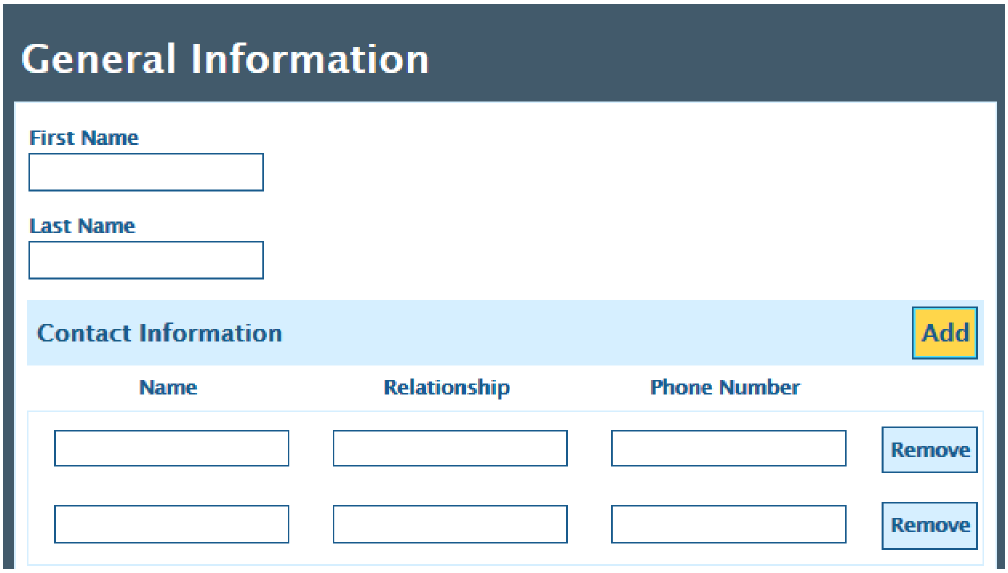
Repeating sections allow you to easily configure Multi-Instance Keyword Type Groups on a form. Repeating sections also allow you to configure non-keyword fields that you would like to have multiple instances of on a form. Repeating sections allow you to define what fields can be repeated without requiring you to define the number of instances allowed during form design. You can create fields on the fly at run time. This is accomplished by simply creating a repeating section or table and placing controls that you want to repeat within it.

Note: If the repeating section on your form is not configured with a Multi-Instance Keyword Type Group, the data entered in the fields in the repeating section is saved to the **Disk Group (XML)** Document Type.

In the following example, upon entering data in the first set of fields, you can click **Add** to create another set of fields for data entry.



This form allows effortless field creation at the time the user needs additional fields. In the next screen, we can see that another row was added to enter an additional item.



To create a set of values for a Multi-Instance Keyword Type Group:

1. In the form, click **Add**.
2. Fields for the keywords within a Multiple Instance Keyword Type Group are displayed for input.
3. Enter the appropriate values for the keywords.
4. Repeat steps 1 to 3 for each instance of a Multi-Instance Keyword Type Group you want to add to the form.
5. Save or submit the form.

Note: You can remove an instance by clicking the corresponding **Remove** button.

Using Masking

When a field has a required mask, upon entering the field, the mask is displayed.

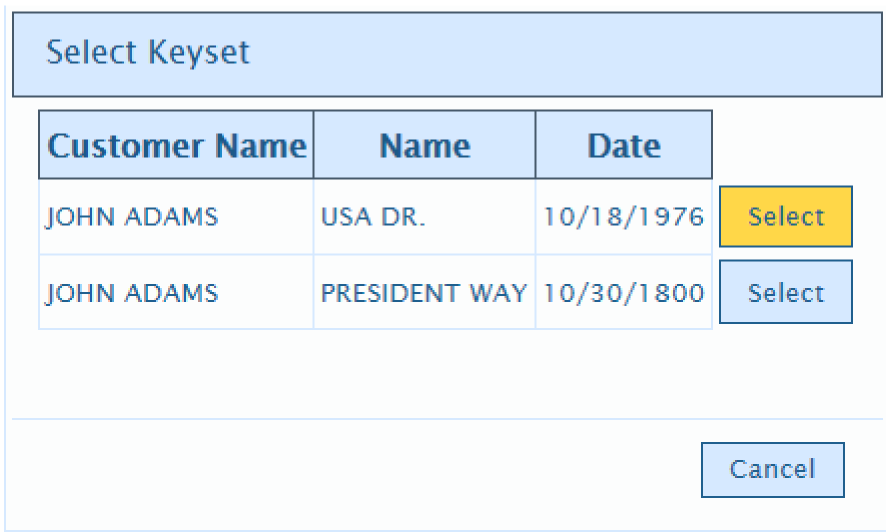
Using Forms with Multiple Pages

When a form has multiple pages, tabs are available at the top of the form. To access a different page, click on the corresponding tab.

You can also navigate the pages of a form using the TAB key. Press the TAB key until the desired page is highlighted, then press ENTER to select the page.

Using AutoFill Keyword Sets on Forms

When a form is configured with an AutoFill Keyword Set, a primary value can be entered on a form and the secondary values will be populated. Enter a primary keyword value and press **Tab** on the keyboard to expand the AutoFill Keyword Set. Alternately, you can press **Enter** to expand an AutoFill Keyword Set after entering a primary keyword value. Upon pressing **Enter** a second time after expanding the AutoFill Keyword Set, the form will submit. If a primary value has more than one set of secondary values associated with it, the values will be displayed for selection. The following is an example of this:



Click **Select** next to the values you want to use for the form.

Keyword Types belonging to an AutoFill Keyword Set that are assigned to the Document Type the form belongs to will be expanded regardless of whether the Keyword Types are on the form itself. The expanded Keyword Type values will be displayed in the keyword panel.

When using Single Instance Keyword Type Groups and standard Keyword Types together, values will be expanded in both the Keyword Type Group and across standard Keyword Types. If the primary keyword is in a Single Instance Keyword Type Group or standard Keyword Type, values in Multiple Instance Keyword Type Groups are not expanded.

When a primary Keyword Type is in a Multiple Instance Keyword Type Group, only the Keyword Types in the AutoFill Keyword Type Set that are a part of the Multiple Instance Keyword Type Group are expanded.

If using Unity Forms in conjunction with the Unity Briefcase, and the Unity Briefcase Field Application is configured with an AutoFill Keyword Set, the AutoFill Keyword Set will be available on the form. AutoFill Keyword Sets that are not included in the Field Application are not available.

Caution: Unity Forms only supports multiple AutoFill Keyword Sets when using the form's user interface. Multiple AutoFill Keyword Sets are not supported in Unity Forms during re-indexing or when editing keyword values in a keyword panel. Multiple AutoFill Keyword Sets must be expanded within the form.

Using Lookups

When a form is configured with a lookup button, you can enter values into fields that have been associated with a lookup button and find an AutoFill Keywords Set that contains the value(s) entered. For example, if you need to find an account number, but you only have a person's name and address, you can enter the information you have in the form when configured to do so. Then, click **Lookup** and find the account number you need to populate in the form. To use a lookup:

1. Enter values in the fields that will help identify the AutoFill Keyword Set you are trying to locate. Depending on the configuration of the form, not all fields on the form will perform the lookup function.
2. Click **Lookup**. If only one value set exists for the information entered, the form fields associated with the AutoFill Keyword Set are populated.

   If multiple value sets exist for the information entered, the **Select Reverse Lookup Match** window is displayed.
3. Click **Select** next to the values you want to use to populate the form. The fields that are configured on the form that are associated with the selected AutoFill Keyword Set are populated.

If using Unity Forms in conjunction with the Unity Briefcase, **Lookup** buttons are disabled when forms are opened in the Briefcase application.

Using Auto Number Keyword Types

If a Unity Form has an auto numbering Keyword Type on it and the Keyword Type is a standard Keyword Type, the value of the Keyword Type will display the auto incremented value upon loading the form in the viewer.

If the Keyword Type is a part of a Multi-Instance Keyword Type Group, the value will increment upon submitting the form.

If using Unity Forms in conjunction with the Unity Briefcase, auto numbered keyword values will not be generated while forms are offline. Existing auto numbered keyword values are displayed on forms when viewing forms offline.

Required Fields

When a field is required, an asterisk is displayed beside the field. When an asterisk is displayed, a value must be entered in the field before you can successfully submit the form.

Note: If the field that is required is read-only, the form will save if there isn't a value in the read-only, required field.

Using Date Fields

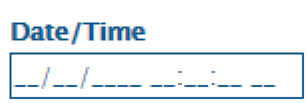
When a field is associated with date-formatted data, clicking inside of the field will display the following date selection control:

The arrow button at the top allows you to navigate to a different month. The drop-down list allows you to select the relevant year. Click on the date to select it.

Note: If you are in a locale that uses a non-Gregorian calendar, the calendar control is not displayed. Instead, a masked field is displayed, allowing you enter the date in the proper format. Leading zeros must be entered for days and months.

Using Date & Time Fields

When a field is associated with date/time-formatted data, clicking inside of the field will display the following date/time masked control:



Enter the date and time within the formatted field, the date followed by the time.

Using Drop-Down Lists

Some fields in a form are configured to use Data Sets. You can use the drop-down list next to these fields to select a value. In addition, you can type values into a field and all values in the Data Set that match the currently entered characters will display for selection.

Using Radio Button Groups

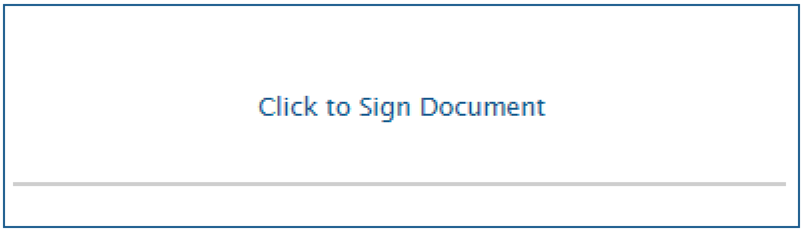
Some fields in a form are configured to use a Radio Button Group. You can select the radio button that corresponds to the appropriate value.

Note: If the form functionality depends on a selected radio button, upon radio button selection the form will reflect this functionality.

Using Signature Fields

When a form has signature fields, you can sign in the field using your mouse. In addition, if you are using a touchpad-enabled device, you can use a stylus to sign the form. To sign:

1. Click on the signature control. It will say **Click to Sign Document**.



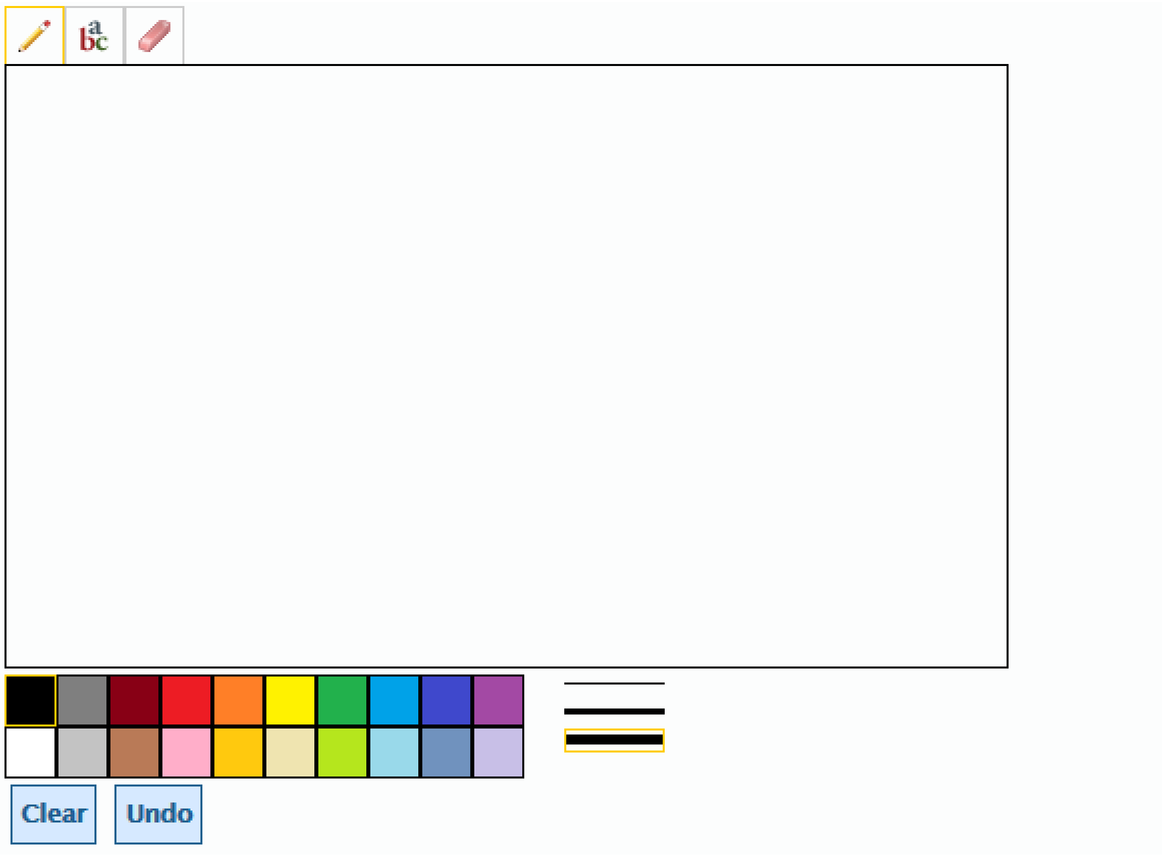
2. A signature field will display.

3. Sign in the designated signature area.
4. Click **Apply Signature**.

You can click **Clear** if you want to change the signature and sign again. If you want to cancel the signature, click **Cancel**.

Using Drawing Controls

When a form has a drawing control, a control similar to the following is displayed:



The following features are available:

- When the pencil button is selected, you can draw lines within the box.
- When the text button is selected, you can enter text that will be placed in the box.
- When the eraser button is selected, you can erase lines and text within the box.
- The color palette allows you to define what color the pencil and text controls will use.
- The line width options allow you to define how thick you want the lines to be that are created by the pencil and erase tools.

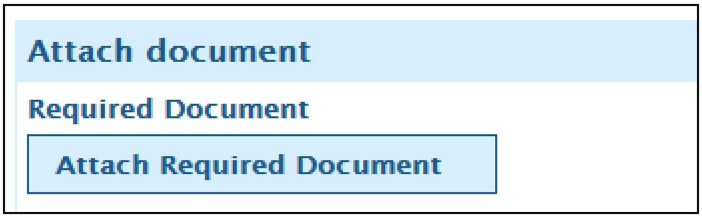
- Click **Clear** to clear the entire drawing control contents.
- Click **Undo** to undo the last action performed within the control. You can use the **Undo** button to step backwards through changes made in the control.

Note: Once a form is submitted or resubmitted, the changes made before the submission cannot be undone.

Note: If you are using a browser that does not support this control, a message stating **Your browser does not support the drawing control.** is displayed.

Attaching Documents

When a form has an attachment control, documents can be imported and attached to the form. The following is an example of an attachment control:



- In an iOS environment, only image files or videos can be attached.
- The attachment control is not supported in iOS versions prior to iOS 6.

Depending on your configuration, you may be able to either attach existing documents, attach documents from an external location, or both. The user interface for the attachment control depends on how your administrator has configured the attachment control.

For more information on attaching documents, see the following sections:

- Attaching Existing Documents on page 115
- Attaching Documents from an External Location on page 117

Attaching Existing Documents

You can attach documents that already exist in OnBase to the form if the form you are using is configured to allow existing documents to be attached.

Note: Attaching documents from OnBase is not available to users who do not have document retrieval rights.

To attach a document from OnBase:

1. From the **Available Attachment Types** drop-down, select the Document Type you want to use to attach a file to the form. Depending on your solution, you may have one or more Document Type available for selection.
2. Click **Attach** and select **Existing Document**. The OnBase document retrieval window is displayed.

Note: If the attachment control is configured to only allow existing OnBase documents to be attached, the OnBase document retrieval window is displayed automatically.

   If the **Choose File to Upload** dialog box is displayed instead of the OnBase document retrieval window, then the attachment control is configured to only allow documents from an external location to be attached. For more information on attaching documents from an external location, see Attaching Documents from an External Location on page 247.

3. Use standard document retrieval methods to search for the document you want to attach and click **Find**. The results of the search are displayed in the **Search Results** section.

Note: Under the **Document Types and Groups** section, the Document Type configured for the attachment button is automatically selected by default and cannot be changed.

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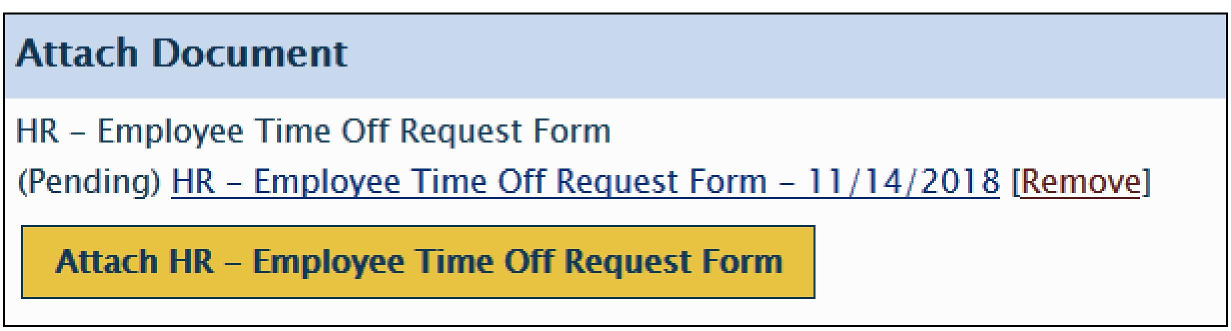
4. Click on a document to select it. To verify the document is the correct document to attach, expand the **Document Viewer** section to preview the document.
5. Click **Attach**. The file and its name are displayed in the control.



   After attaching a document, you can preview it before the form is submitted. Click on the document name to open a new dialog box that displays the attached document.

   To remove an attached document before the form is submitted, click **Remove**.

6. If the control allows multiple attachments, the attachment button remains available for additional attachment uploads. Click the **Attach [document display name]** button to attach additional documents.

   You can attach multiple documents at a time by holding the **Ctrl** key and selecting the documents you want to attach to the form. All the selected documents are attached to the form when you click the **Attach** button.

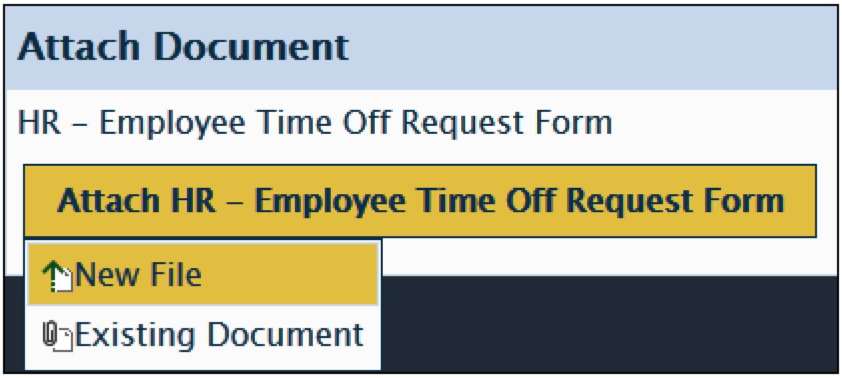
When the form is submitted, the documents are attached to the form.

Attaching Documents from an External Location

You can attach a document that exists in a location other than OnBase to the form.

To attach a document from an external location:

1. Click the **Attach [document display name]** button. For example, if the document display name is HR - Employee Time Off Request Form, the button is named **Attach HR - Employee Time Off Request Form**.

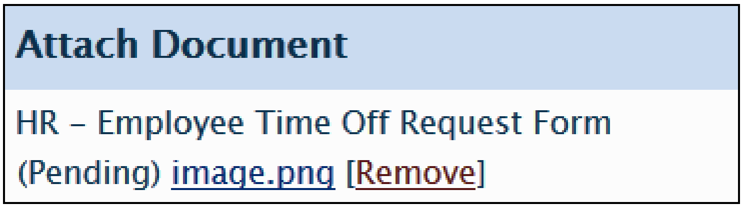


2. If a drop-down list is displayed, select **New File**. The **Choose File to Upload** dialog box is displayed.

Note: If the attachment control is configured to only allow documents from an external location to be attached, the **Choose File to Upload** dialog box is displayed automatically.

If the OnBase document retrieval window is displayed instead of the **Choose File to Upload** dialog box, then the attachment control is configured to only allow existing documents in OnBase to be attached. For more information on attaching existing documents from OnBase, see Attaching Existing Documents on page 115.

3. Locate and select the file you want to attach.
4. Click **Open** or double-click the file to open it. The file and its name or path are displayed in the control.



After attaching the file, you can preview it before the form is submitted. Click on the file name to open a new dialog box that displays the attached file.

To remove an attached document before the form is submitted, click **Remove**.

5. If the control allows multiple attachments, the attachment button remains available for additional attachment uploads. Click the **Attach [document display name]** button to attach additional documents.

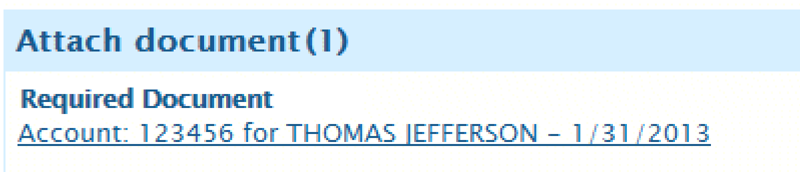
   You can attach multiple documents at a time by holding the **Ctrl** key and selecting the documents you want to attach to the form. All the selected documents are attached to the form when you click the **Attach** button.

Note: You cannot upload attachments larger than the size configured by the administrator.

When the form is submitted, the documents are attached to the form.

Viewing Attachments

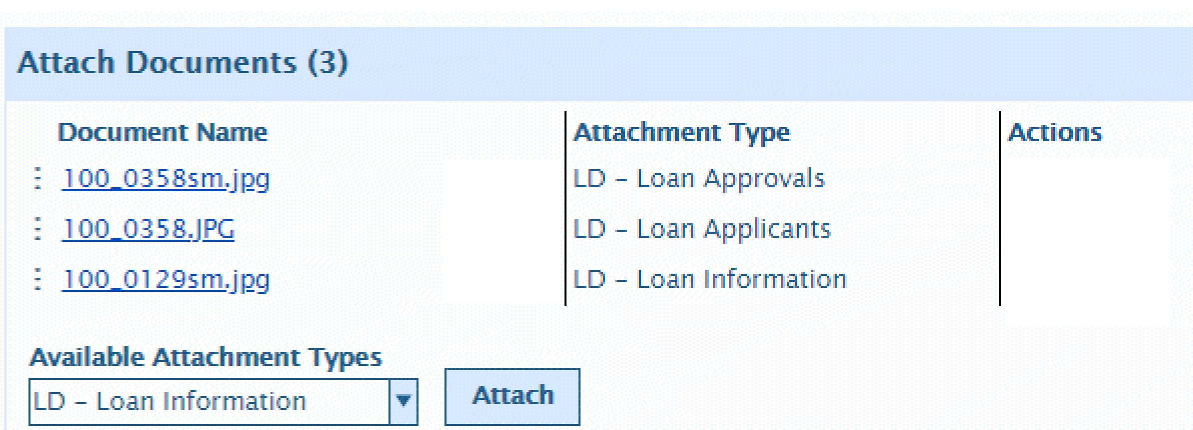
When an attachment exists on a form, a link to the document is displayed on the form. The following is an example:



To view the attachment, click on the link.

In the event that an attached document is purged from the system, the link will read **Missing: Attached document has been purged** and the document will not be accessible.

Depending on the configuration of a form, the attachment control may have sortable lists of attachments. When multiple attachments are attached in a sortable configuration, it will look similar to the following example:



You can arrange the order of the attachments in the control by clicking on the handle, denoted by three vertical dots to the left of the original filename of the attachment, and drag the file up or down in the list. Depending on your configuration, you may also be able to remove attachments from the form. When this is available, a **Remove** link will be displayed in the **Actions** column.

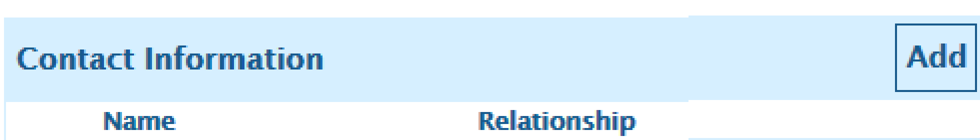
Keyboard Shortcuts for Attachment Control

The following keyboard shortcuts can be used to navigate the attachment control.

Keyboard Key	Description
Tab	Moves to the different components of the attachment control.
Spacebar	When the handle control is tabbed on (denoted with three vertical dots), selects the corresponding row. When tabbed to a clickable selection in a row, evokes left click function.
Up/Down Arrows	When focus in the list of attachments, moves up or down the list of attachments. When the attachment type drop-down is the focus, expands the drop-down menu.
Left/Right Arrows	When focus is in the list of attachments, moves across the attachment row.

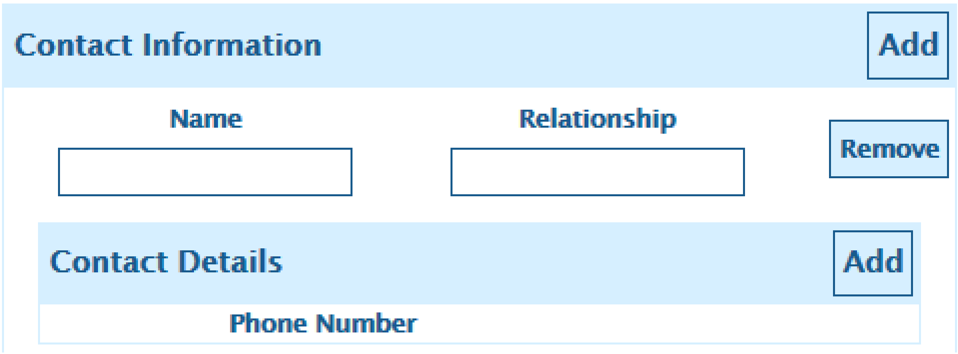
Using Nested Tables

Nested tables allow you to associate multiple line items to a single line item. The following is an example of a nested table in a form:

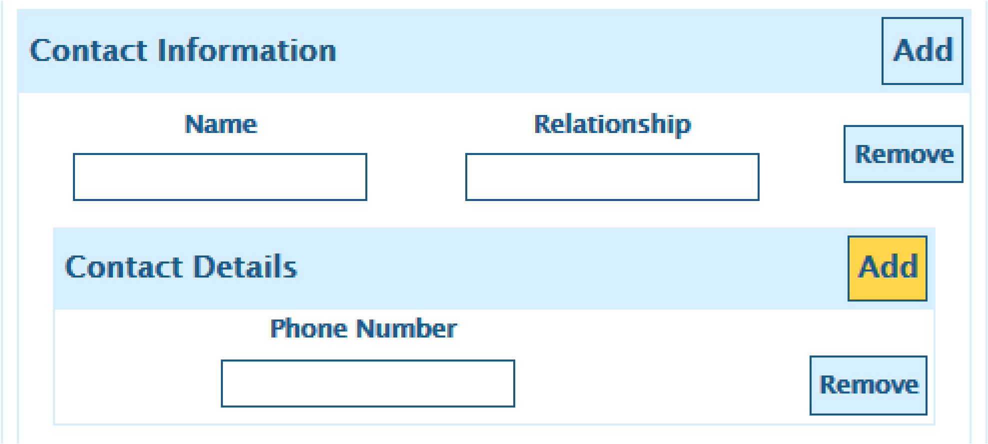


To use a nested table:

1. Click **Add**. This will expand the first level of the table.



2. Enter information for the first level.
3. Click **Add** to add a line item to relate to the first level line item. The second level expands.



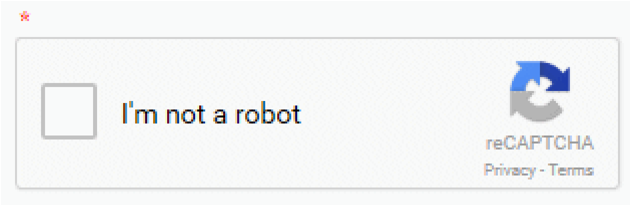
4. Enter the appropriate data.
5. You can add lines at the first or second levels of the table as appropriate.

Any level of the table can be expanded or collapsed by clicking on the heading of the table.

You can remove a row by clicking the corresponding **Remove** button.

Verifying Form Interaction

Your form may be configured to require you to verify that you are an actual person filling out the form and it is not being filled out programmatically. When this is required, the following control is displayed on your form:



Note: When using Microsoft Internet Explorer, Compatibility Viewing must be turned off. If this is not turned off, you will get a message stating that a browser upgrade is required.

Note: The form must be online for this control to have access to the required CAPTCHA service.

To complete this field:

1. Select the **I'm not a robot** check box.
2. A group of images with a question will display. Follow the on-screen instructions to answer the question correctly.
3. When the question is answered, click **Verify**.
4. Once it is verified correctly, a green check will display in the control and the form can be submitted once all other information is correctly entered.

Reading Bar Codes

When a form has a bar code reader button, a bar code can be read and the value read from the bar code can be populated in a field designated by the system administrator. To use a bar code reader button:

1. Click the bar code reader button. This button's name will vary by form.
2. On a desktop system:
    - Upon clicking the button, the **Choose File to Upload** dialog box is displayed.
    - Navigate to the directory where the image containing the bar code resides.
    - Select the appropriate image and click **Open**. Upon the bar code being successfully read, a message under the bar code reader button stating **Successfully read bar code** is displayed and the value is populated into the appropriate field. If a bar code was not recognized in the selected file, a message stating **Failed to read bar code** is displayed.

    In an iOS environment:
    - Upon clicking the button, two options are available: **Take Photo or Video** and **Choose Existing**.
    - Click **Choose Existing** to select an image from the **Camera Roll**. Select **Take Photo or Video** to create a new image. Upon the bar code being successfully read, a message under the bar code reader button stating **Successfully read bar code** is displayed and the value is populated into the appropriate field. If a bar code was not recognized in the selected file, a message stating **Failed to read bar code** is displayed.

The following bar code types are supported:

- Codabar
- Code 128
- Code 39 (3 of 9)
- Code 93
- EAN 9 and 13
- Interleaved 2 of 5
- UPC-A
- UPC-E

Printing Unity Forms

If your form contains a print button, you can print all of the tabs in the form you are viewing. To print, click the button in the form and select the appropriate print options from the **Print** dialog box that is displayed. Alternately, you can press **Ctrl + P** on the keyboard to access the **Print** dialog box.

Note: If you do not have printing rights in OnBase and you use **Ctrl + P** to print, a blank page will be printed.

The following are items of note concerning printing:

- The print button's name will vary by form.
- When printing a form with a multi-line text box, the entire contents of the field is printed regardless of whether or not you can see all of the data in the field on the screen.
- When printing a form with sections, the entire contents of a section is printed regardless of whether or not the section is expanded or collapsed.
- When printing a form, controls such as buttons, page tabs, color picker, and drawing tools will not be printed.
- When printing a form with a wide table that extends past the printable page area, the table may be truncated. Only the portion of the table within the printable page area will be printed.
- If an invalid signature is printed, a red border is printed around the control. In addition, the label is displayed in red.
- When printing in Internet Explorer, settings in the **Page Setup** dialog box affect how Unity Forms are printed. The settings that can affect the way a form is printed are **Print Background Colors and Images**, **Margins**, and **Headers and Footers**.
- When printing in Internet Explorer, background images and signatures are not supported.
- The Forms Designer cannot show page breaks. When printing Unity Forms with multiple pages, the printed pages may not correspond with the pages in the Forms Designer.

Client Overview

The Mobile Access Feature Matrix lists options and features available through the Mobile Applications Broker Server, and shows which OnBase Mobile Access products support each feature. Features listed in this matrix apply to the following products:

- Mobile Access for Android
- Mobile Access for iPad (Legacy)
- Mobile Access for iPad
- Mobile Access for iPhone
- Mobile Access for iPhone (Legacy)

For more information about each OnBase Mobile Access client, see the respective module reference guide. The following section lists the available features for the OnBase Mobile Access client products and where they are supported.

Categories of Features

Features are broken down into the following categories.

- General Functionality on page 125
- Keywords on page 126
- Notes and Annotations on page 127
- Viewing Documents on page 128
- Supported File Types for Viewing on page 129
- Custom Queries / Document Search on page 130
- Workflow on page 131
- Business Activity Monitoring on page 132

- E-Forms and Unity Forms on page 133
- Upload on page 133
- Offline Document Access on page 135
- User Administration on page 136
- Custom URLs on page 136

General Functionality

The following table lists general OnBase client features and where they are supported.

General Functionality	Mobile Access for Android	Mobile Access for iPad (legacy)	Mobile Access for iPad	Mobile Access for iPhone (legacy)	Mobile Access for iPhone
Deployment via third-party application store (e.g., Apple® App Store®, Google Play™ store)	X	X	X	X	X
Support for Mobile Device Registration in Active Directory	X	X	X	X	X
Support for Mobile Device Management (MDM) / Managed App Configuration		X	X	X	X
Support for Touch ID® Login[a]			X		X
Remember User Name	X	X	X	X	X
Change Expired Password	X	X	X	X	X
Support for Interface Translations	X		X		X
Support for Login Banners	X		X		X

a. Touch ID login requires an iOS device that supports Touch ID.

OnBase Mobile applications do not support configurable icons (e.g., icons configured for OnBase Custom Queries or Document Types).

Keywords

The following table lists general keyword features and where they are supported.

Keywords	Mobile Access for Android	Mobile Access for iPad (legacy)	Mobile Access for iPad	Mobile Access for iPhone (legacy)	Mobile Access for iPhone
View Keyword Values	X	X	X	X	X
View Full Keyword Value (pop-up window displaying full Keyword Value)		X	X	X	X
View Keyword Type Groups	X	X	X	X	X
View Multi-Instance Keyword Type Groups	X	X	X	X	X
View Security Keywords	X	X	X	X	X
View Security Masked Keyword Values[a]			X		X
View Encrypted Keywords	X	X	X	X	X

a. The Encrypted Alpha Keywords license is required.

Notes and Annotations

The following table lists general Note and Annotation features and where they are supported.

Notes and Annotations	Mobile Access for Android	Mobile Access for iPad (legacy)	Mobile Access for iPad	Mobile Access for iPhone (legacy)	Mobile Access for iPhone
Add Notes	X	X	X	X	X
View Notes	X	X	X	X	X
Edit Notes	X	X	X	X	X
Delete Notes	X	X	X	X	X
Draw Annotations On Documents			X		X
View Annotations Drawn On Documents			X		X
Edit Annotations On Documents			X		X
Delete Annotations On Documents			X		X

Viewing Documents

The following table lists features available when viewing documents. These features are available for image documents and may also be available for other file types described later in this document. Some features may not apply to other file types.

Viewing Documents	Mobile Access for Android	Mobile Access for iPad (legacy)	Mobile Access for iPad	Mobile Access for iPhone (legacy)	Mobile Access for iPhone
Display Document Auto-Name String	X	X	X	X	X
Display Document Type Overlay			X		X
Zoom In/Out	X	X	X	X	X
View Multi-Page Documents	X	X	X	X	X
View Page Thumbnails for Multi-Page Documents			X		X
Navigate Document in Display (Scroll/Pan)	X	X	X	X	X
"Go To Page" Document Viewing	X		X		X
Temporarily Rotate Document While Viewing (rotation is not saved)		X		X	
View Cross-Referenced Documents	X		X	X	X
Download Read-Only Documents for Offline Access		X			
Send Documents as Email Attachments		X	X	X	

Viewing Documents	Mobile Access for Android	Mobile Access for iPad (legacy)	Mobile Access for iPad	Mobile Access for iPhone (legacy)	Mobile Access for iPhone
View PDF Bookmarks			X		X
Sign Image and PDF Documents[a]			X		X

a. The Signature Pad Interface (TWAIN) license is required. Additionally, the PDF Framework license is required for signing PDF documents.

Supported File Types for Viewing

The following table lists the supported file types for viewing documents as well as where they are supported.

Supported File Types (Document Viewer)	Mobile Access for Android	Mobile Access for iPad (legacy)	Mobile Access for iPad	Mobile Access for iPhone (legacy)	Mobile Access for iPhone
Text (.txt)	X	X	X	X	X
Rich Text (.rtf)		X	X	X	X
Image	X	X	X	X	X
OLE/PDF (.doc, .docx, .xls, .xlsx, .ppt, .pptx, .pdf)	X	X	X	X	X
HTML/E-Form	X	X	X	X	X
Unity Form	X	X	X	X	X

Supported File Types (Document Viewer)	Mobile Access for Android	Mobile Access for iPad (legacy)	Mobile Access for iPad	Mobile Access for iPhone (legacy)	Mobile Access for iPhone
XML[a]	X	X		X	

a. In order to view XML files, the document type must be configured to apply a style sheet to XML files. The XML cannot contain an embedded link to the style sheet. XML documents are rendered on the device as HTML, and the HTML displayed must be able to be parsed by the device. For information on configuring XML style sheets, see the E-Forms module reference guide.

Custom Queries / Document Search

The following table lists Custom Query retrieval features and where they are supported.

Custom Queries / Document Search	Mobile Access for Android	Mobile Access for iPad (legacy)	Mobile Access for iPad	Mobile Access for iPhone (legacy)	Mobile Access for iPhone
Execute Custom Query	X	X	X	X	X
Execute HTML Form Custom Query	X	X	X	X	X
Date Search Options (Single Date)	X	X	X	X	X
Date Search Options (Date Range)	X	X	X	X	X
Binary Operators			X		X
Value Operators			X		X

Workflow

The following table lists Workflow features and where they are supported.

Note: Workflow features are only available with Workflow licensing.

Workflow	Mobile Access for Android	Mobile Access for iPad (legacy)	Mobile Access for iPad	Mobile Access for iPhone (legacy)	Mobile Access for iPhone
Access Workflow	X	X	X	X	X
View Unity Life Cycles[a]	X	X	X	X	X
View Queue Counts	X	X	X	X	X
View Queue Lists	X	X	X	X	X
Access Load Balanced Queues	X	X	X	X	X
View Other Users' Documents	X	X	X	X	X
Support for Default Sorting	X	X	X	X	X
Support for Custom Filtering and Sorting	X	X	X	X	X
Support for Workflow Filter Rules	X		X	X	X
Password Protected Tasks	X	X	X	X	X
User Interaction Tasks[b]	X	X	X	X	X
Viewing Related Documents	X	X	X	X	X

a. Only Unity Life Cycles that route documents can be viewed.
b. For a list of supported user interaction tasks, see the respective mobile application's documentation.

Business Activity Monitoring

The following table lists Business Activity Monitoring features and where they are supported.

Note: Business Activity Monitoring features are only available with Business Activity Monitoring licensing.

Business Activity Monitoring (BAM)	Mobile Access for Android	Mobile Access for iPad (legacy)	Mobile Access for iPad	Mobile Access for iPhone (legacy)	Mobile Access for iPhone
Access BAM		X			
Workflow Dashboard Portlet		X			
Workflow Queue Activity Portlet		X			
Workflow Queue Filter Portlet		X			

E-Forms and Unity Forms

The following table lists basic E-Form and Unity Form features and where they are supported. For information about specific form functionality, see the E-Forms or Unity Forms documentation.

E-Forms and Unity Forms	Mobile Access for Android	Mobile Access for iPad (legacy)	Mobile Access for iPad	Mobile Access for iPhone (legacy)	Mobile Access for iPhone
View E-Forms	X	X	X	X	X
Create E-Forms	X	X	X	X	X
Submit E-Forms	X	X	X	X	X
View Unity Forms	X	X	X	X	X
Create Unity Forms	X	X	X	X	X
Submit Unity Forms	X	X	X	X	X

Upload

The following table lists document upload features and where they are supported.

Upload	Mobile Access for Android	Mobile Access for iPad (legacy)	Mobile Access for iPad	Mobile Access for iPhone (legacy)	Mobile Access for iPhone
Upload a Photo from the Device's Camera[a]	X	X	X	X	X

Upload	Mobile Access for Android	Mobile Access for iPad (legacy)	Mobile Access for iPad	Mobile Access for iPhone (legacy)	Mobile Access for iPhone
Assign a Document Type	X	X	X	X	X
Index Keywords	X	X	X	X	X
Index AutoFill Keyword Sets	X	X	X	X	X
Index External AutoFill Keyword Sets	X	X	X	X	X
Index External Keyword Data Sets			X		X
Index Cascading Data Sets			X		X
Add Multiple Instances of Standard Keywords			X		X
Crop Images			X		X
Rotate Images			X		X
Adjust Image Quality, Color, Brightness, Contrast			X		X

a. This feature is only supported on devices that have a camera.

Supported File Types for Upload

The following table lists the file types supported when uploading documents to OnBase.

Supported File Types (Upload)	Mobile Access for Android	Mobile Access for iPad (legacy)	Mobile Access for iPad	Mobile Access for iPhone (legacy)	Mobile Access for iPhone
Text (.txt)	X	X		X	
Rich Text (.rtf)	X	X		X	
Image	X	X	X	X	X
OLE/PDF (.doc, .docx, .xls, .xlsx, .ppt, .pptx, .pdf)					

Offline Document Access

The following table lists offline document access features and where they are supported.

Offline Document Access	Mobile Access for Android	Mobile Access for iPad (legacy)	Mobile Access for iPad	Mobile Access for iPhone (legacy)	Mobile Access for iPhone
Download Documents for Read-Only Offline Access		X			
View Read-Only Documents Offline		X			

User Administration

The following table lists user administration features and where they are supported.

User Administration Functionality	Mobile Access for Android	Mobile Access for iPad (legacy)	Mobile Access for iPad	Mobile Access for iPhone (legacy)	Mobile Access for iPhone
Lock/Unlock User	X			X	
Update Password	X			X	

Custom URLs

The following table lists the features available with custom URL creation and where they are supported. Refer to the module reference guide for the specific product for configuration information.

Custom URL Functionality	Mobile Access for Android	Mobile Access for iPad (legacy)	Mobile Access for iPad	Mobile Access for iPhone (legacy)	Mobile Access for iPhone
Documents: Open document in OnBase	X	X	X	X	X
New Form: Create a new form in OnBase	X	X	X	X	X
Upload: Upload new document to OnBase	X	X	X	X	X
Workflow: Open queue in OnBase	X	X	X	X	X
Workflow: Open document within queue in OnBase	X	X	X	X	X