OnBase®
Foundation EP5

Client

Reference Guide

Includes:

Installation Guide

User Guide

Foundation EP5

Copyright

Document Name .... Client

Department/Group .... Documentation

Revision Number .... Foundation EP5

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INSTALLATION

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OnBase Overview

OnBase allows you to create, retrieve, manage and distribute electronic documents. Specifically, you can:

- Retrieve documents
- Create and delete documents
- Import and index documents
- Organize documents
- Print documents
- Send and receive mail
- Customize the appearance of your user interface

Retrieving and Modifying Documents

Several methods are available for retrieving documents. The **Document Retrieval** dialog box allows you to retrieve documents based on Document Type Group, Document Type, Document Date, Keyword Values, and document contents such as text and note text.

Document retrieval can be further customized with the use of Custom Queries. Custom Queries are predefined sets of search criteria that allow you to quickly access frequently retrieved documents.

You can modify documents by adding notes, annotations and redactions, or by adding, deleting and rearranging document pages.

Creating and Deleting Documents

If your system administrator has enabled certain features, you can delete existing documents and create new ones.

Importing and Indexing Documents

The system provides the ability to import single documents via the **Import** menu option or drag-and-drop file import.

Documents can be indexed or re-indexed with Keyword Values that aid in document retrieval. Index values can be entered individually, or with AutoFill Keyword Sets, which automatically enter related Keyword Values based on a single Keyword Value entry.

Note: When importing a large number of documents (such as with an import processor), the Windows® operating system architecture allows for a maximum number of items to be viewed in a list. Therefore, OnBase users will be able to view only the first 65,543 documents in a list generated by a process or retrieval.

Organizing Documents

The OnBase Client module provides several ways to organize your documents.

- Documents that share common characteristics are grouped by Document Types. Documents Types can be further organized by Document Type Groups.
- Documents of different Document Types can be organized across a preset structure of File Cabinets and folders.
- Envelopes allow users to group related and unrelated documents together in a personal filing system that provides easy access to documents.

Sending and Receiving Mail

You can send mail and attached documents to internal users who retrieve mail directly from a system mailbox, or to external users who access mail through mail programs such as Microsoft® Outlook™.

Customizing the Appearance of the User Interface

The appearance and default behavior of portions of the user interface can be customized for each individual user and/or workstation.

Note: Some features or options described may not be available to you, depending on your system's setup and licensed products. If you have questions about why you cannot see or execute a described feature, please contact your system administrator.

Licensing

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

If you are a new customer as of OnBase Foundation EP5 or greater, see Simplified Licensing on page 3.

If you are upgrading from a version of OnBase prior to OnBase Foundation EP5, see Legacy Licensing on page 3.

Simplified Licensing

The Essential User, Standard User, or Premier User license is required.

Legacy Licensing

One of the following licenses is required:

- Concurrent Client
- Workstation Client
- Named User Client

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

Definitions

The following section defines the OnBase terminology used in this guide.

Annotations

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

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

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

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

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

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

Note: To move an annotation, follow the same procedure you would to move a note. See Saving Note Position on page 130 for more information.

AutoFill Keyword Set

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

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

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

AutoFill Keyword Set Instance

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

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

Note: All instances of an AutoFill Keyword Set to which your User Group has rights can be viewed through the **AutoFill Keyword Set Management** option in OnBase. See your system administrator for details.

Auto-Foldering

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

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

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

Cascading Data Sets

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

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

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

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

Cross-Reference

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

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

HTML-Based Documents

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

Custom Queries

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

In the OnBase Client, Custom Queries can also allow you to retrieve folders from multiple Folder Types.

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 Handle

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

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.

Envelope

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

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

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

File Cabinet

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

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

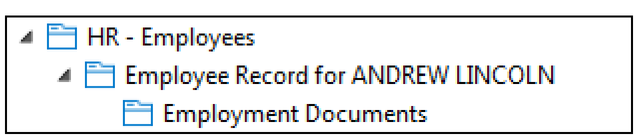
Folder Definition

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

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

Folder Hierarchy

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



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

Folder Contents

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

Dynamic Folder

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

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

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

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

Static Folder

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

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

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

  Documents imported using this method can be automatically indexed with the static folder’s Keyword Values, provided that the folder’s Keyword Types also exist on the Document Type.
- Documents residing in a static folder do not have to share the same Document Type or Keyword Values.

Image Documents

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

Keyword Data Sets

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

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

Keyword Types and Keyword Values

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

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

Keyword Types

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

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

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

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

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

Keyword Values

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

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

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

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

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

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

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

Keyword Type Groups

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

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

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

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

Multi-Instance Keyword Type Groups

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

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

Tip: To remove an entire instance of a Multi-Instance Keyword Type Group while indexing or re-indexing, place the pointer inside any of the Multi-Instance Keyword Type Group's Keyword Type fields and press **Ctrl+Del**.

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

Keyword Type Masking

Keyword Type masking sets a specific format for a Keyword Type which affects the way you work with Keyword Values in OnBase.

Keyword Type masking serves two purposes. The first is to set a specific format for a Keyword Type, allowing for more efficient indexing and retrieval. Once a mask is defined for a Keyword Type, OnBase will validate that the Keyword Value entered matches the mask for that Keyword Type. If the Keyword Value does not match the mask for that Keyword Type, OnBase will display an error message stating that the value is invalid.

Keyword Type masking can also be used for security purposes when displaying certain alphanumeric Keyword Types. When this kind of Keyword Type mask is configured, a portion of the alphanumeric Keyword Type, or the entire alphanumeric Keyword Type, is hidden by the configured mask. For example, a social security number Keyword Type is configured so all but the last four digits of each social security number are masked by the * character. In this example, a user viewing a social security number in OnBase would see *******6789 instead of the actual Keyword Value stored in OnBase, 123-45-6789.

Note

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

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

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

Caution: If an image document, or page is dragged-and-dropped into another image document, then all notes associated with the first document/page are lost. However, if an image document is appended to an existing image document during indexing via matching Keyword Values, then any notes on that document/page are retained once it is appended to the existing document.

Notes are displayed on all renditions of a document.

Note: A note has a maximum character length of 249 characters. If a note appears truncated, it is because the note has been configured to use variable text. The variable text is causing the note to exceed the maximum character length of 249 characters. If you are experiencing truncated notes, contact your system administrator.

Note: When viewing a PDF rendition of a document, notes may not appear at the same location as they are in the original document. This is due to the inability to link a note to a particular page when viewing documents in a PDF viewer.

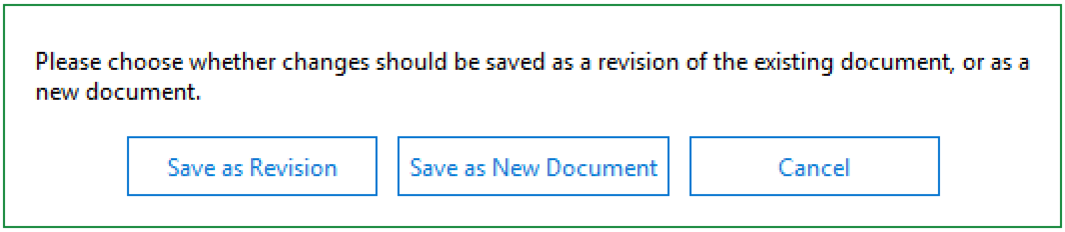
OLE Documents

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

When you open an OLE document in OnBase, the document is displayed in a viewer based on the document's source application. If the **Launch Office Business Application** option from the Document Options Icon in the document title bar is available, you can view documents using the Office Business Application. Note that if you are viewing an older document (.doc instead of .docx), the document is read-only.The document's right-click options are specific to the source application. OnBase options can be accessed by right-clicking the document in a Document Search Results list.

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

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



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

Overlay

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

Print Queue

A print queue connects documents waiting to be printed with a printer and then tracks the status of documents in the printing process.

There are three types of print queues: Local Print Queue, Network Print Queue and Print Cluster Queue.

Local Print Queue

Each workstation that is connected to the system has access to a local print queue. The local queue is defined in the **Print Queue** mapping tab. Access this tab by selecting **User | Workstation Options**, and click the **Print Queue Mapping** tab.

If a print queue has not been mapped, the system sends documents to the operating system default printer for the workstation.

Network Print Queue

When documents are printed to a network print queue, they are routed to a designated print server machine that handles network print queue requests. In this case, the print server machine (rather than the workstations submitting requests) must be mapped to the network print queue.

The primary advantage of network print queues is that if a job fails, you can correct the problem and then reset the print job status to reprint. You can also check the progress of large print jobs sent to a network print queue.

Workstation Printers

Workstation Printers are printers that have been added at the current workstation via the Windows operating system.

Print Cluster Queue

Print cluster queues consist of two or more network print queues. Print cluster queues increase printing speed by allowing multiple printers attached to different print servers to process the same job. When documents are sent to a print cluster queue, the system divides the number of documents evenly among the print queues contained within the cluster. Document order is maintained among the print queues, so printed documents can be taken from each printer and stacked in the original order.

The actual cluster print queue does not have to be mapped on a workstation or server. However, each of the network print queues that are part of the cluster must be mapped on the server that will be doing the actual printing, just as normal network print queues must be mapped.

Note: The Print Queue names shown above are examples. Your print queues may have different names. Print Queue names are determined in the configuration program.

Staples

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

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

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

When using staples, consider the following:

- The Staple icon and staple note are placed on the primary document, and a Back Staple icon and back staple note are placed on secondary documents.
- For documents consisting of multiple revisions, Staple icons appear on all revisions. When viewing a stapled document from any revision of an open document, the latest available revision of the stapled document is displayed.
-
-
- Not all file formats support using staples. See your system administrator to verify whether your document supports using staples.

Style Sheets in OnBase

Some documents contain style sheets that determine how they display in the system, how they print and how they appear when emailed.

Sometimes, documents with style sheets are set up to display one way in the system and print or email with another style sheet determining appearance. See your system administrator for more information.

No Style Sheet

If your document has a style sheet, you may be able to select alternate style sheets or **No Style Sheet**. Style Sheets display below the **No Style Sheet** option when you click the Document Options Icon:

Text Documents

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

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

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

User

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

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

User Group

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

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

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

OnBase®

Foundation EP5

Client

Installation Guide

Foundation EP5

Requirements

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

General Requirements

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

- Databases Supported
- Database/File Servers
- Database Client / Server Compatibility
- Supported Desktop Operating Systems
- Microsoft .NET Framework Requirements
- Microsoft Visual C++ Requirements
- Client Retrieval Workstation Hardware Requirements
- Third-Party Software Compatibility
- About Virtual Environments
- 64-bit Support Statement
- Windows User Account Control Statement

Hyland Software - Microsoft Windows Updates

The developers of OnBase are dedicated to ensuring the regular cumulative updates released by Microsoft® are compatible with OnBase. The R&D Department of Hyland Software regularly evaluates the cumulative fixes released and labeled as Critical or Important by Microsoft. The details of the update provided by Microsoft are reviewed for interaction with OnBase, and the update is installed when appropriate for testing its compatibility with OnBase. If you have questions regarding a specific Microsoft cumulative update and its compatibility with OnBase, please contact your support provider.

Windows 10 Updates

For Windows 10 updates, Microsoft has introduced a new release cadence called the Semi Annual Channel (SAC). The SAC reduces the security patch and support cycle for versions of Windows 10 to 30 months. Hyland Software does not expect to encounter incompatibilities with Windows 10 updates, and it does not plan to change its process for the continued release and support of new versions of OnBase because of the new Microsoft SAC cadence. In the unlikely event that a future Windows 10 update introduces an incompatibility that prevents OnBase from operating as designed, Hyland will make commercially reasonable attempts to address the incompatibility in the latest release and the prior release. If an issue is determined to be related to an incompatible version of Windows 10, you may be required to upgrade to the current OnBase release to resolve the issue and maintain compatibility with Windows 10.

Third-Party Software Requirements

If you are using encrypted disk groups in a Windows 10 environment and have Microsoft Edge configured as your default PDF viewer, you must install the Adobe Acrobat Reader DC to properly access PDF files stored on the encrypted disk group through the OnBase Client.

Licensing

See Licensing on page 2 for licensing requirements.

Client Virtualization

It is the recommended security best practice that the OnBase Client and other ODBC-based clients and applications be deployed and operated in a virtualized environment. See the **Desktop and Application Virtualization Guide** for information on how to install and configure OnBase in a virtualized environment.

For information on security concepts and best practices for OnBase, see the **Security Best Practices** reference guide.

Installation

Refer to the **Client Installer** module reference guide for installation procedures.

Backup/Recovery

Backup

Configuration

Configuration information for the OnBase Client module, including **User Options** and **Workstation Options**, is stored in the OnBase database. A proper backup of the database will contain all configuration information related to the OnBase Client module.

Registry Settings

No registry settings apply to the OnBase Client module.

External Files

It is important to commit documents to the system as quickly and as regularly as possible. All documents that have not yet been committed exist solely in the first mass storage copy of the Disk Group. If the first mass storage copy suffers a drive failure, any uncommitted information is lost.

You will need to backup your onbase32.ini file.

Additional Steps

Run Configuration Reports from the OnBase Configuration module (**Report | Run All Reports**) regularly.

Configuration reports detail the exact configuration of items within OnBase. This information can be used to re-create the configuration of the OnBase Client module if the database cannot be recovered or restored

Additionally, Configuration reports are stored in OnBase, so a historical record of OnBase's structure is easily and reliably accessible.

Recovery

Configuration

The configuration for the OnBase Client module is stored in the OnBase database. Restoring the database will restore any OnBase Client module configuration.

Registry Settings

No registry settings apply to the OnBase Client module.

External Files

Committed documents are copied to the secondary mass storage and removable copies of the Disk Group; these documents can be restored to the first mass storage copy from one of these copies.

All documents that are not committed exist solely in the first mass storage copy of the Disk Group. If the first mass storage copy suffers a drive failure, any uncommitted information is lost.

All files required for the re-installation of the OnBase Client module are supplied by the installer program.

Module-Related .INI Options

The onbase32.ini file can be restored from the backup if the recovery machine is intended to be used for exactly the same purpose as the original machine.

For more information about the INI file, please see INI File on page 22.

Registration

Migrate the registration of OnBase Client module from the original workstation to this workstation. The registration may need to be revoked from the original machine and then added to the recovery machine.

Additional Steps

Reports

Run Configuration Reports from the OnBase Configuration module (**Report | Run All Reports**) after the recovery operation is complete. Compare these Configuration Report to the last Configuration Reports created to ensure that all OnBase Client module settings have been correctly restored.

INI File

INI files (initialization files) are plain-text files that contain configuration information. These files are used by Windows and Windows-based applications to save and access information about your preferences and operating environment. OnBase uses an initialization file named onbase32.ini. If users do not have rights to access the onbase32.ini file, they will be unable to use the Client or the Configuration module.

The onbase32.ini file is primarily used to store settings specified in the Client or the Configuration module. For example, when a user selects a default data source in the OnBase Client's Workstation Options dialog box, this selection is saved to the onbase32.ini file. The onbase32.ini file is also used to make modifications to OnBase modules that cannot be made through the module's interface.

Location

For modern Windows operating systems, the default location of the onbase32.ini file is **C:\ProgramData\Hyland Software**. For previous versions of OnBase running on older operating systems, the default location of the onbase32.ini file was **C:\Documents and Settings\All Users\Application Data\Hyland Software**.

Note: To maintain backwards compatibility with previous versions of OnBase, OnBase checks the workstation's **C:\Windows** folder for the OnBase INI file if it is not found in the folder specified above. If the OnBase INI file is found in the **C:\Windows** folder, OnBase copies the file to the new location. The previously existing version of the OnBase INI file remains in the **C:\Windows** folder, but it is no longer used by OnBase.

Your onbase32.ini file may reside in a different location, if that location is specified by the following command line switch on the OnBase Client shortcut target:

-INIFILE= "full path\filename", where **full path** and **filename** are replaced by the specific path and file name.

If this command line switch is not used and you move or rename your onbase32.ini file, OnBase recreates the file in the default folder and ignores the newly created file.

INI Considerations in a Citrix and Microsoft Windows Remote Desktop Environment

In Remote Desktop environments, a remote session is established in which the user is running applications that are not installed locally. This presents a challenge when an application, such as OnBase, requires a user-specific INI file to establish unique settings. In a Remote Desktop environment, you must ensure that each user has a single, unique INI file to make sure any user-specific settings are consistent for that user.

Note: The default location of the OnBase INI file is not unique in a Remote Desktop environment.

To ensure that the INI file is accessible by OnBase and unique to each user in a Remote Desktop environment, the **-INIFILE** command line switch must be applied to the OnBase Client and Configuration shortcuts and be set to a unique location for the INI file.

Note: Additional details regarding the deployment of OnBase in a remote desktop environment is discussed in detail in the **Citrix and Microsoft Windows Remote Desktop Environment Deployment Guide**, available from your first line of support.

Editing the INI File

Users with the **Configuration** product right can open the onbase32.ini file from the OnBase Client by selecting **Admin | Utilities | Edit INI File**. When multiple onbase32.ini files exist, opening the onbase32.ini file from the OnBase Client ensures that a user is editing the correct onbase32.ini file instance. In most cases, this will be the onbase32.ini file residing in the default directory described above. If an alternate location for the onbase32.ini file is specified by the **-INIFILE** command line switch, the file in the specified location will be opened.

Troubleshooting

The following issues and errors pertain to the OnBase Client module. If you encounter errors or issues related to a module accessed from the Client module, see the module's reference manual for troubleshooting information.

Common Issues

Issue	Context and Cause(s)	Solution(s)
When dragging and dropping pages from one image document to another, the quality and color of the images being moved is decreased.	When JPG images are copied or moved, they might not be saved at the same compression level as the original image file.	• Set the **JPEGQuality option** in the onbase32.ini file to a higher value. To save the JPG files at the same quality/compression level as the original image, set the option to **JPEGQuality=100**. **Note:** This setting does not affect JPG-compressed TIFF images. These images will degrade when dragging and dropping them from one document to another.

Issue	Context and Cause(s)	Solution(s)
Date fields within OnBase display using an undesired format such as using a two-digit year (mm/dd/yy).	OnBase uses the Windows Regional Date Format to display date fields.	To change how OnBase displays dates, you must change the Windows Regional Options settings for date formats. For information on changing Windows Regional Options settings, see Windows documentation. **Caution:** Changing Windows Regional Options settings can result in the loss of currency keywords. For more information, see the section on Windows Regional Options in the **Technical Requirements Overview for New Installations and Upgrades** documentation.
When I copy a long line of text from a text file and paste it into another application, not all of the text is pasted.	This occurs when the copied line of text is longer than the **Characters per line** setting.	To resolve this issue, you should increase the **Characters per line** setting. See the System Administration documentation for more information.
Functions in Microsoft Excel spreadsheets do not display correctly in the OnBase Client.	The same functions display correctly outside of the OnBase Client, as well as in the Web Client.	In order to display the functions correctly in the OnBase Client, it may be necessary to enable the Analysis Toolpak Add-In within Excel. To enable the Analysis Toolpak Add-In within Excel, follow these steps: 1. Select **Tools | Add-Ins**. 2. Select the **Analysis ToolPak** check box. 3. Click **OK**.
When running the OnBase Client as administrator, PDF documents are not being displayed.		Ensure that a compatible version of Adobe Reader is used. For more information on third-party software compatibility, see the **Installation Requirements** manual.

Issue	Context and Cause(s)	Solution(s)
When printing an HTML form from the Document Search Results list, the form does not print as expected.	Forms are rendered using Microsoft Internet Explorer controls instead of standard OnBase controls. When selecting to print a form from the Document Search Results list, OnBase is used to print the document.	If forms are not printing correctly from the Document Search Results list: 1. Open the form. 2. Right-click the form and select **Print**. The Internet Explorer **Print** dialog box is displayed. 3. Configure print settings as needed. 4. Click **Print**. The form should print correctly.
Scripts fail to run when using the OnBase Client.	The script may be attempting to perform actions that require administrator privileges. The script will not run until the OnBase Client is launched with the necessary administrator privileges.	To have the OnBase Client run with administrator privileges: 1. If the OnBase Client is open, close the OnBase Client. 2. Right-click the OnBase Client shortcut and select **Properties**. 3. Select the **Compatibility** tab. 4. Enable **Run this program as an administrator**. 5. Click **Apply**. 6. Click **OK**.

Error Messages and Warnings

Message	Context and Cause(s)	Solution(s)
The application has failed to start because its side-by-side configuration is incorrect. Please see the application event log for more detail.	This message is displayed when logging on to the Client and the required version of the Microsoft Visual C++ Redistributable Package is not installed.	Install the required version of the Microsoft Visual C++ Redistributable Package using the **vcredist_x86.exe** delivered with OnBase.
This application has failed to start because the application configuration is incorrect. Reinstalling the application may fix this problem.	This message is displayed when logging on to the Client and the required version of the Microsoft Visual C++ Redistributable Package is not installed.	Install the required version of the Microsoft Visual C++ Redistributable Package using the **vcredist_x86.exe** delivered with OnBase.

Message	Context and Cause(s)	Solution(s)
OLE Viewer Information - All attempts to create an integrated viewer window for the requested document have failed. This will only occur if the file type has no registered OLE server available that supports in place activation. In addition, the file extension (*.doc) does not have an external application configured to display this file type. No viewer can be created for this file type, at this time.	This message is displayed when attempting to open a Microsoft Word or Excel document when the OLE application used to open the document is busy or locked.	Do not run Microsoft Word or Excel and the Client module concurrently. Wait for a short period after closing a Word or Excel document before opening another document of the same file format. Disable Windows Compatibility Mode on the Client executable. The OnBase Client does not require compatibility mode to be set. 1. Right-click on the Client executable and select **Properties**. 2. Select the **Compatibility** tab. 3. Deselect the **Run this program in compatibility mode for [Operating System]** check box. 4. Click **OK**.
Does not exist in the database	This message is displayed while indexing documents and an invalid Keyword Value is entered.	Select a value that exists in the configured data set for the selected Keyword Type.

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.

Unable to Find or Import from Mapped Network Drives

When importing files from a mapped network drive, an error may occur where the OnBase Client is unable to recognize or access the drive. This happens if the OnBase Client permissions do not match the current user’s permissions that would allow them to access the mapped network drive (such as if the OnBase Client is being run as an administrator).

To resolve this issue, add the **EnableLinkedConnections** Windows system registry key.

Caution: The necessity of adding a Windows system registry key should be evaluated by IT and Security departments before adding the registry key to your environment. This is because the registry key may affect how access tokens are evaluated.

For information on adding the **EnableLinkedConnections** registry key, see your Windows documentation.

Client

User Guide

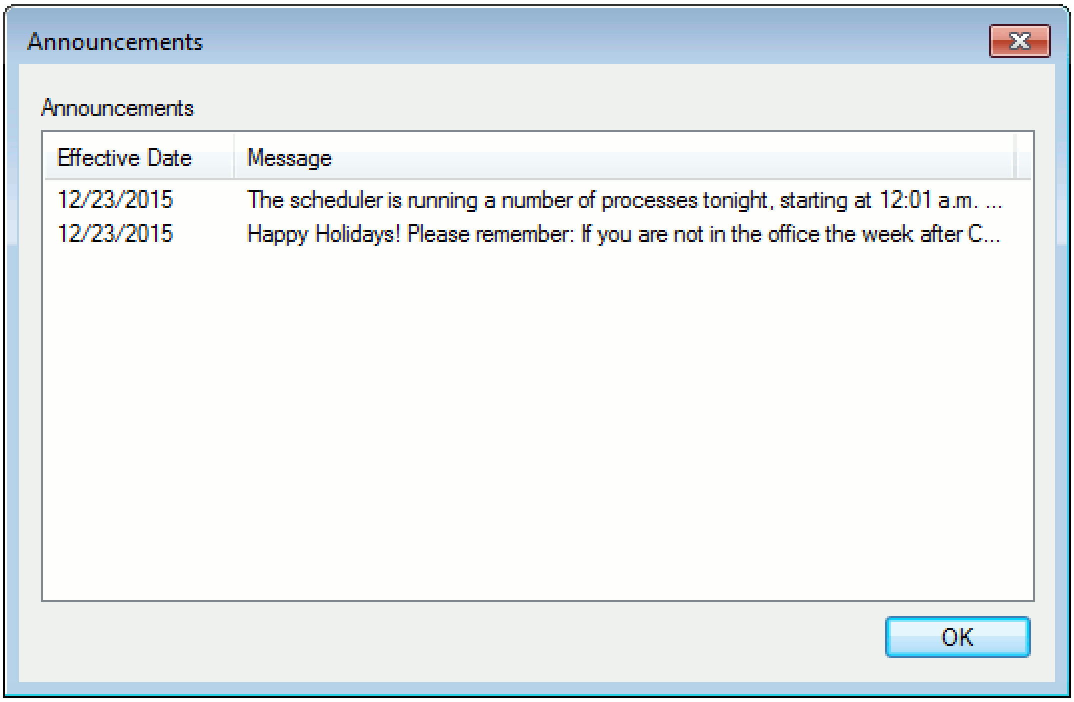
Foundation EP5

This chapter describes how to use the OnBase Client module for all Client functions. See OnBase Overview on page 1 for a general overview of the OnBase Client module.

Logging in to the OnBase Client

1. To log in to the OnBase Client module, you must open the OnBase executable by double-clicking on the executable icon. The OnBase login dialog box is displayed.
2. Select a Data Source from the **Data Source** drop-down list.
3. Enter your user name in the **User Name** field.
4. Enter your password in the **Password** field.
5. Select **Login**.

   Depending on system configuration, the **Announcements** dialog box may be displayed after logging in.



   This dialog box lists configured system notifications and other important announcements, which are displayed for a limited number of days. The date in the **Effective Date** column is the first day the announcement could be displayed.

Tip: Click and drag the right border of the **Message** column to expand the width of the column. This allows longer announcements to be displayed in full.

6. Click **OK** to close the **Announcements** dialog box.

Note: Announcements can only be displayed at login. They cannot be accessed from within the OnBase Client.

Configuring Auto Login

You can configure your OnBase Client to automatically log in using your credentials. To set up an automatic login, follow these steps:

1. Right-click on the OnBase Client desktop icon and select **Properties**.
2. Click the **Shortcut** tab.
3. In the **Target** field, add the following command line statement after the existing text. Place a space between the existing text and this command line statement.
   `-AL UN="<user name>" PW="<password>"`

Note: To improve your system's logon security, you can remove the **PW="<password>"** part of the command line statement. By doing so, the Client Logon dialog box will be displayed with your user name already filled in - however, you will have to enter your password to log on to the system.

4. Click **OK**.

The next time the OnBase Client is launched from this shortcut, you will automatically be logged on to the system.

Note: You will be logged on using the **Default Database Source** specified in the **Workstation Options** dialog box (accessed by selecting **User | Workstation Options**).

Session Interruption

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

- Session Timeout on page 31
- Authentication Required on page 32

Session Timeout

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

Your session with Hyland Services no longer exists. Please re-login and try again.

When this message is displayed, click **OK** and restart the Client.

Authentication Required

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

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

If you are allowed to resume your session, the following message is displayed:

> **The administrator has disconnected your session. You will need to re-authenticate to establish a new session before continuing.**

Click **OK**. The Client login dialog box is displayed. Do one of the following:

- Enter your OnBase password and click **Login** to resume your current session. You are returned to the Client context in which you were previously working. It is recommended that you verify that your last action before the interruption was successfully completed.
- Click **Cancel** to end your current session and click **Yes** to exit the Client.

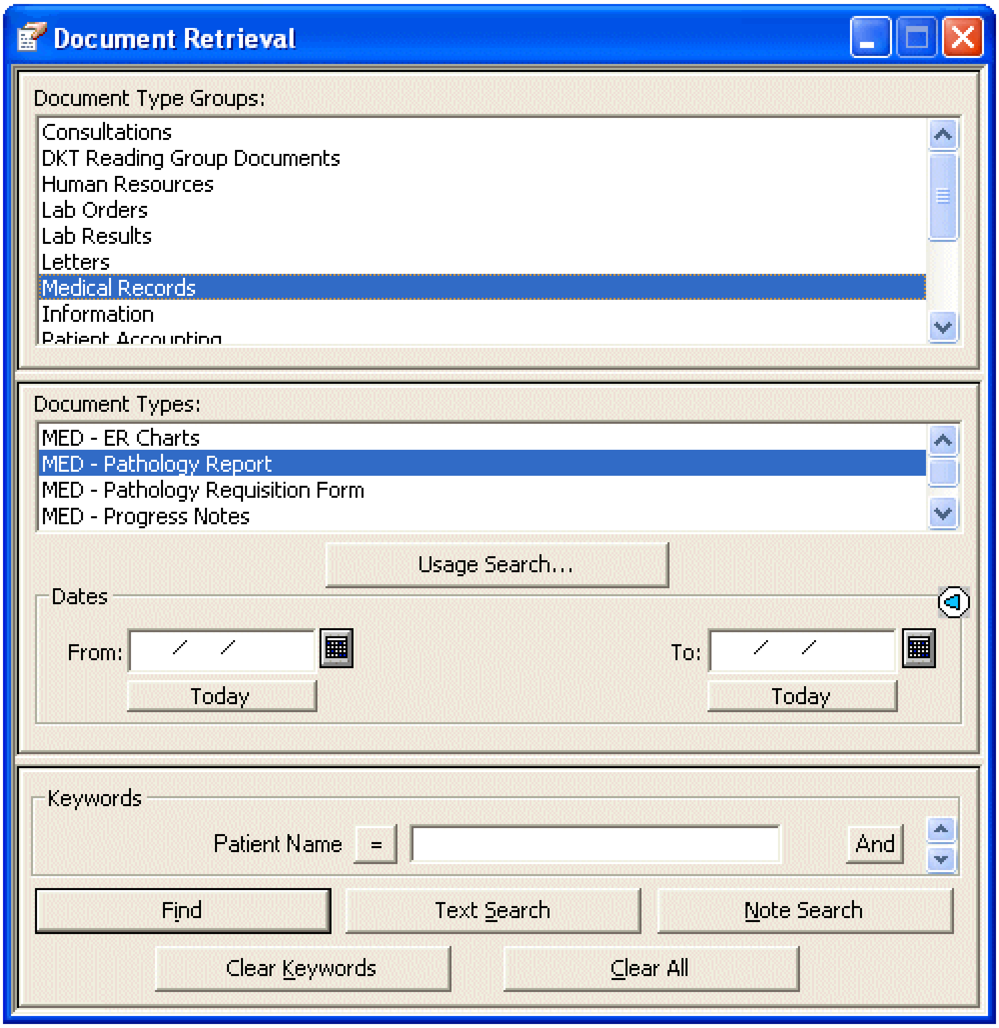
Retrieving a Document

Using the Document Retrieval Window

There are a variety of methods available for retrieving documents. The **Document Retrieval** dialog box is the most common method, as it allows you to search for documents based on Document Type Group, Document Type, Document Date, Keyword Values, and document contents such as text and note text.

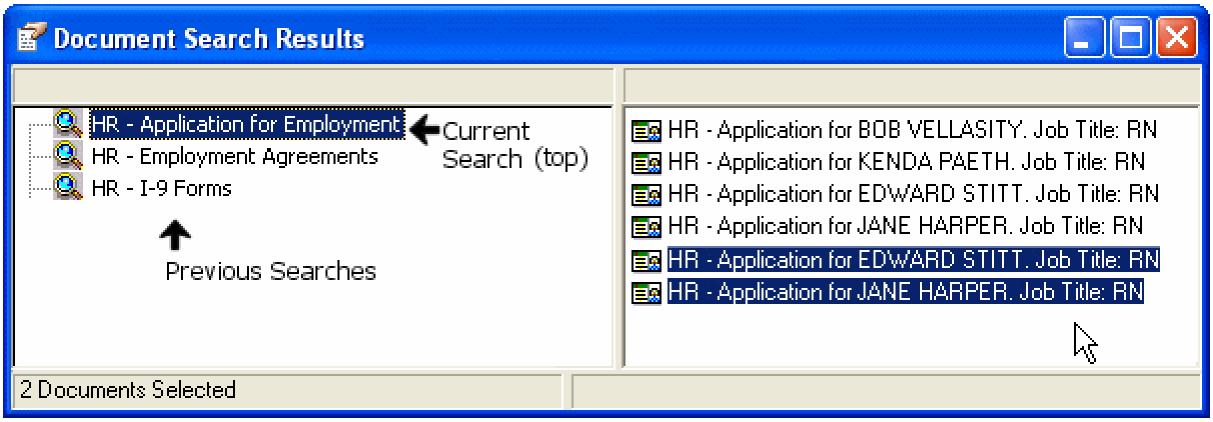
To perform a basic Document Retrieval search, follow these steps:

1. Click the **Retrieve Documents** toolbar button or select **File | Open | Retrieve Document**. The **Document Retrieval** dialog box is displayed.



2. Specify one or more of the following search criteria:
   - Document Types or Document Type Groups
   - Document Date
   - Keyword Values

3. Click **Find**.
4. Documents that match your query is displayed in the **Document Search Results** window. In addition, a list of previous searches is displayed on the left side of this dialog box.



Note: To view the results of a previous search, click on the item in the left pane.

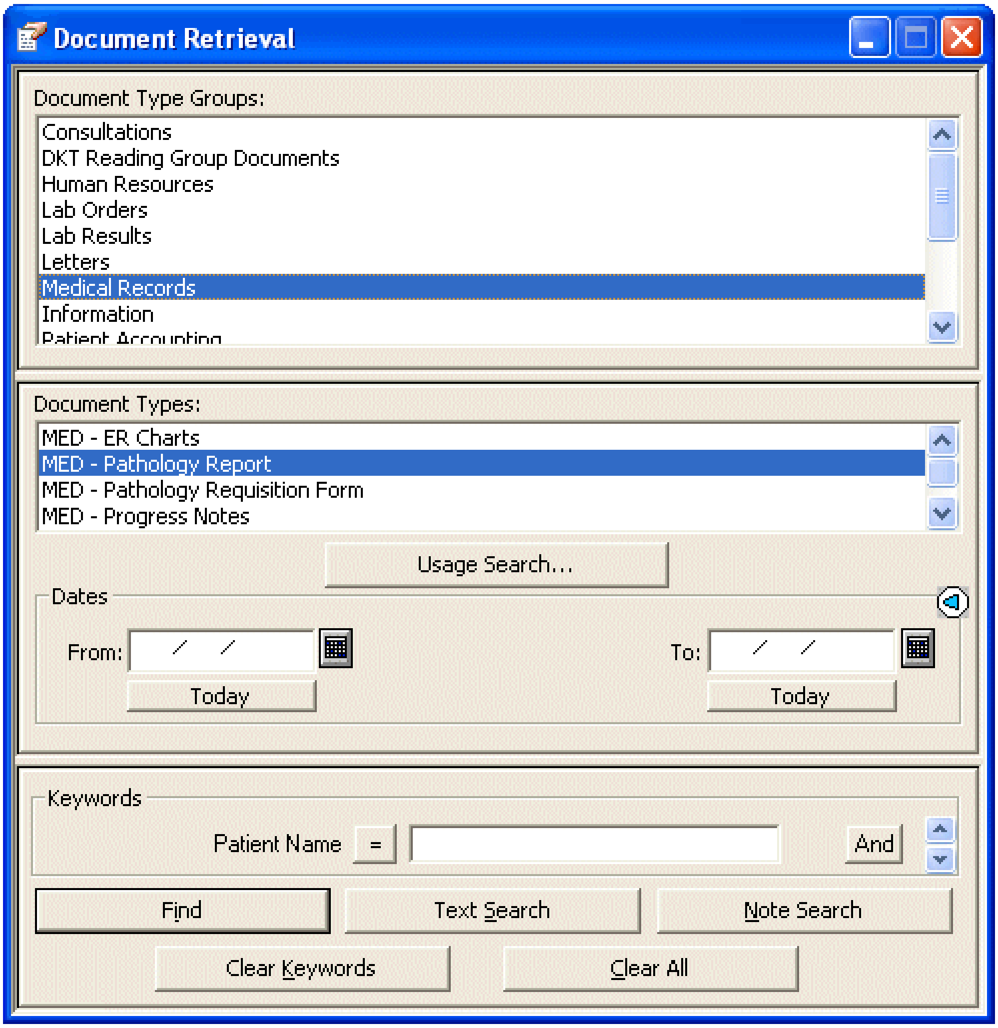
5. Double-click on the document you are searching for to open the document.

Note: For more information on using the Document Retrieval window, see Retrieving Documents (Advanced) on page 35.

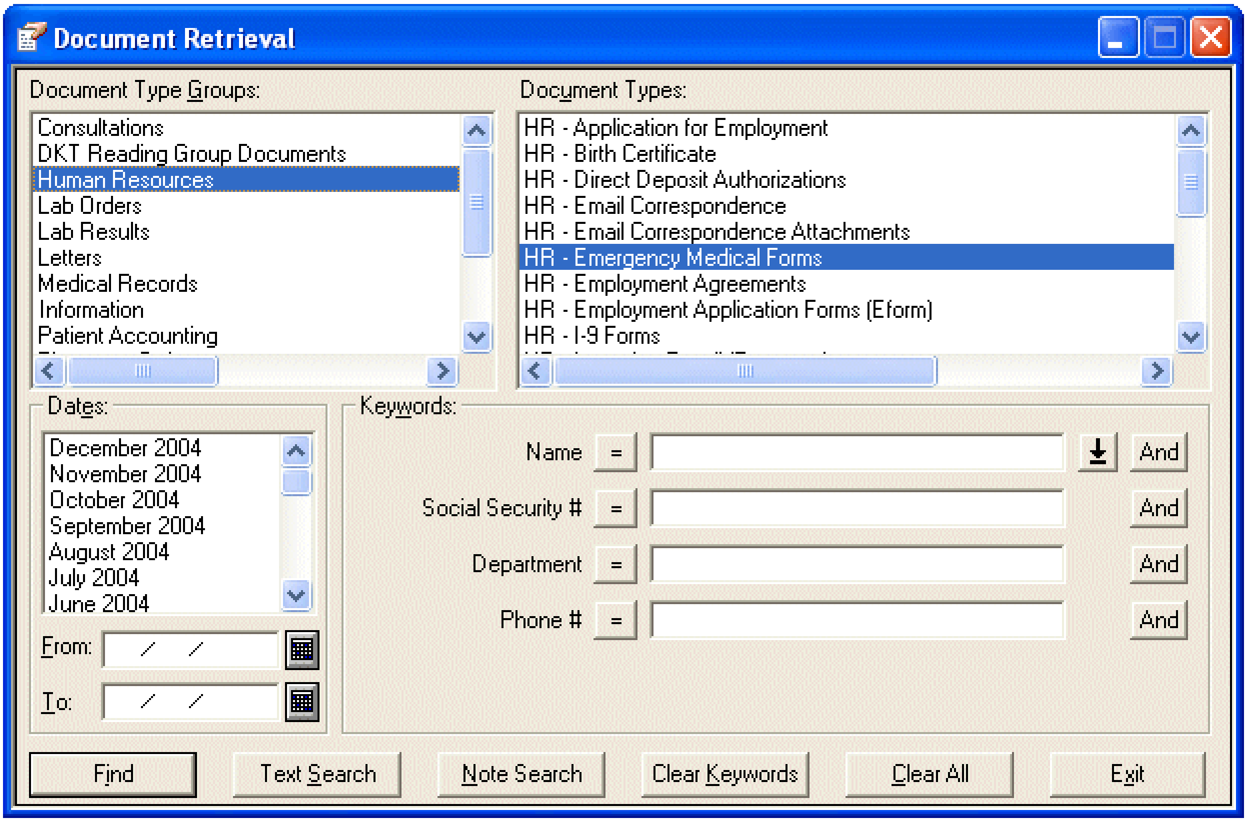
Retrieving Documents (Advanced)

Changing the Appearance of the Document Retrieval Window

By default, the **Document Retrieval** dialog box is displayed in the **Vertical View**:

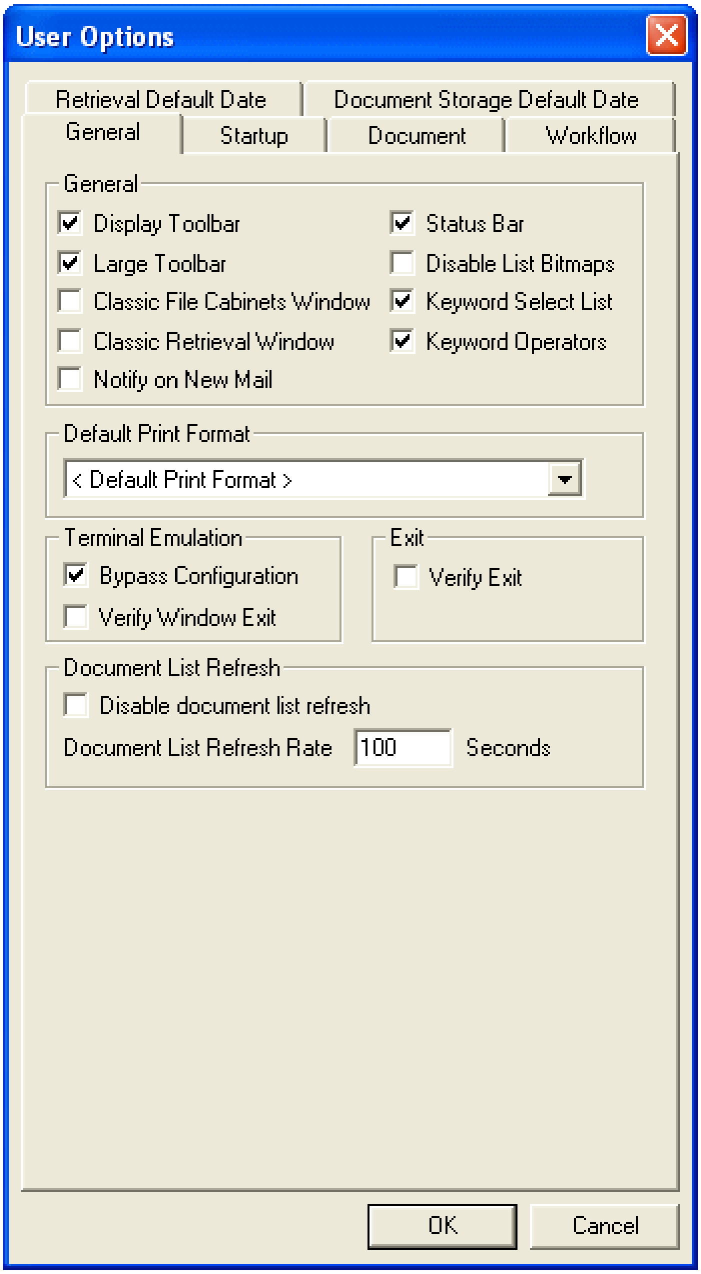


However, you can also set it to open in **Classic View** by selecting the **Classic Retrieval Window** option in the **User Options** dialog box. The **Document Retrieval Classic View**:



To set the Document Retrieval dialog box to **Classic View**,

1. Select the **User | User Options** menu.
   The **General** tab is displayed.



2. In the **General** section, select **Classic Retrieval Window**.
3. Click **OK**. The **Classic View** display setting takes effect immediately.

Selecting a Document

Click on a document once to select it. Double-click to open the document.

See Client Module Shortcut Keys on page 376 for information on how to select multiple documents.

The total number of selected documents is shown in the lower left corner of the **Document Search Results** dialog box.

Retrieving Documents by Document Type Group

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

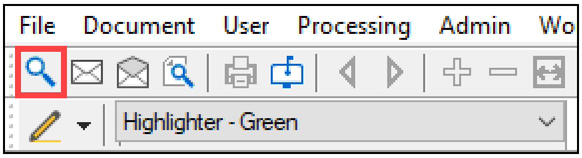
Note: Searching by Document Type Group is only available when it is configured by your system administrator. To determine if you can search a Document Type Group, select a Document Type Group in the **Document Type Groups** section of the **Document Retrieval** window. If the **Find** button is enabled, the option to search the Document Type Group is available.

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

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

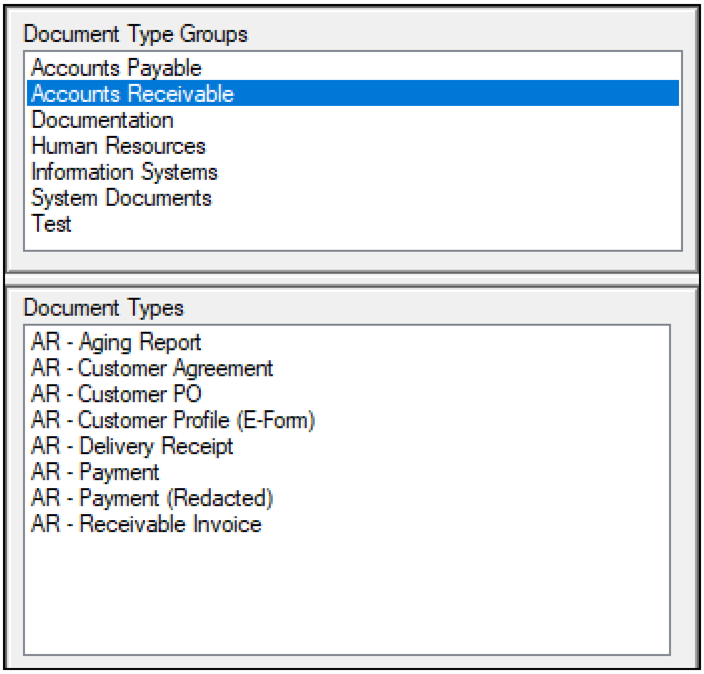
To retrieve documents by Document Type Groups:

1. Open the **Document Retrieval** window in one of the following ways:
   - Click **Retrieve Documents** from the toolbar.



   - Select **File | Open | Retrieve Document**.

2. From the **Document Type Groups** section, select a Document Type Group from which to search.



Note: When a Document Type Group is selected, only Keyword Types common to all Document Types in the selected Document Type Group are displayed.

3. Click **Find** or press **Enter** to perform the search. One of the following may occur:
   - If documents are found, a list of documents is retrieved and displayed in the **Document Search Results** window.
   - If no documents are found, the **No Documents Found** message is displayed.
   - If search parameters are configured for Document Types in the Document Type Group, the most restrictive search parameter is enforced and a prompt is displayed regarding the search parameter to fulfill. If you are required to enter a Keyword Value, see Use Keywords for Document Retrieval on page 42. If you are required to enter a document date or date range, see Retrieving Documents By Date on page 41.

Retrieving Documents by Document Type

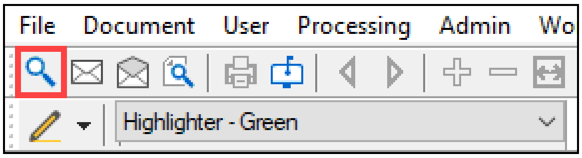
Document Type searches allow you to retrieve documents organized by Document Type.

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

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

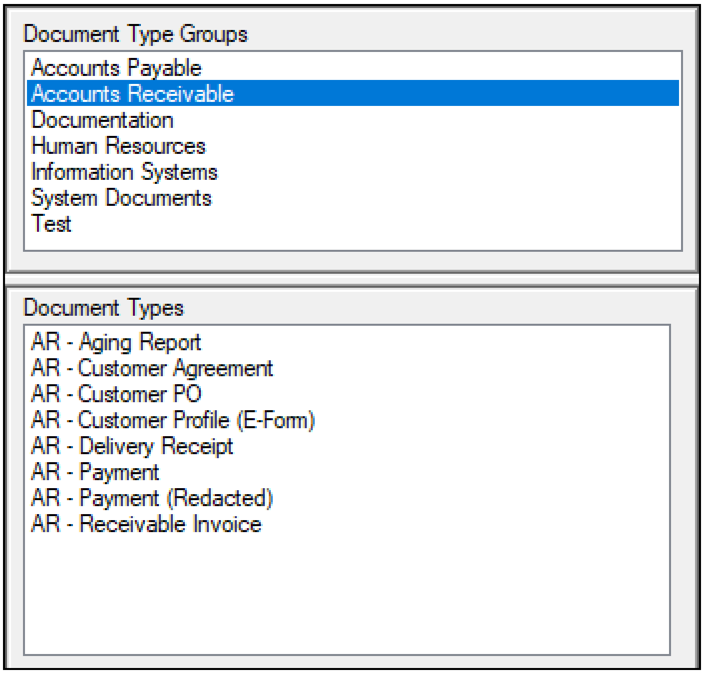
To retrieve documents by Document Type:

1. Open the **Document Retrieval** window in one of the following ways:
   - Click **Retrieve Documents** from the toolbar.



   - Select **File | Open | Retrieve Document**.
2. From the **Document Type Groups** section, select a Document Type Group if you want to narrow the amount of Document Types from which to choose. The Document Types from the selected Document Type Group are displayed in the **Document Types** section.

Note: Not selecting a Document Type Group displays all available Document Types in the **Document Types** section.



3. From the **Document Types** section, select one or more Document Types from which to search.

4. Click **Find** or press **Enter** to perform the search. One of the following may occur:
   - If documents are found, a list of documents is retrieved and displayed in the **Document Search Results** pane.
   - If no documents are found, a **No Documents Found** message is displayed.
   - If you selected one Document Type and it is configured with a search parameter, a prompt is displayed regarding the search parameter to fulfill. If you are required to enter a Keyword Value, see Use Keywords for Document Retrieval on page 42. If you are required to enter a document date or date range, see Retrieving Documents By Date on page 41.
   - If you selected multiple Document Types, and they are configured with varying search parameters, the most restrictive search parameter is enforced and a prompt is displayed regarding the search parameter to fulfill. If you are required to enter a Keyword Value, see Use Keywords for Document Retrieval on page 42. If you are required to enter a document date or date range, see Retrieving Documents By Date on page 41.

Retrieving Documents By Date

When performing a **Document Retrieval** search, you can filter the search by **Document Date**.

Note: In the OnBase Client module, you can set a **Default Date** or date range to automatically be displayed in the **Document Retrieval** dialog box, **Date** section. This is set in the **User Options** (**User | User Options | Retrieval Default Date**) menu.

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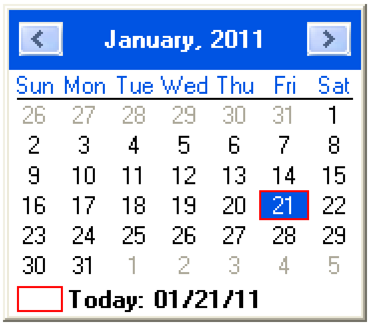
1. In the **Document Retrieval** dialog box, use the **Dates** section to enter a specific date or date range for your search.
2. In the **From:** and **To:** edit fields, enter the date values by either:
   - Typing the date values directly using the following syntax: **MM/DD/YYYY**, OR
   - Selecting a date from the calendar. To open the calendar, click on the calendar button.



Note: This date value is the **Document Date**, not the Date Stored.

Use Keywords for Document Retrieval

Once you have selected a Document Type, its Keyword Type fields appear in the **Keywords** section. If a Keyword Type requires you to enter a value to search by, the Keyword Type is displayed in red.

Keyword Types that Contain Relationships

Some Keyword Types have been configured to provide smart searching capabilities for retaining relationships in retrieval.

Cascading Data Sets

If two or more of the Document Type's available Keyword Types contain drop-down lists and are ordered in such a way as to show a hierarchical parent/child relationship, the Keyword Types may be part of a Cascading Data Set.

See Keyword Types Relationship Examples in Document Retrieval on page 55 for information on how a Cascading Data Set supports the relationship of Keyword Type Values in retrieval.

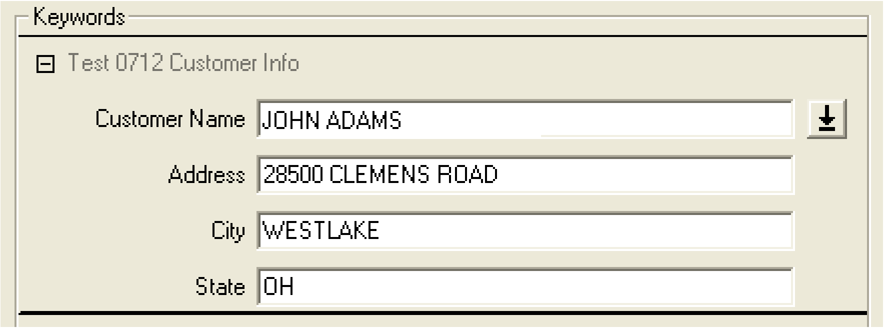
Multi-Instance Keyword Type Groups

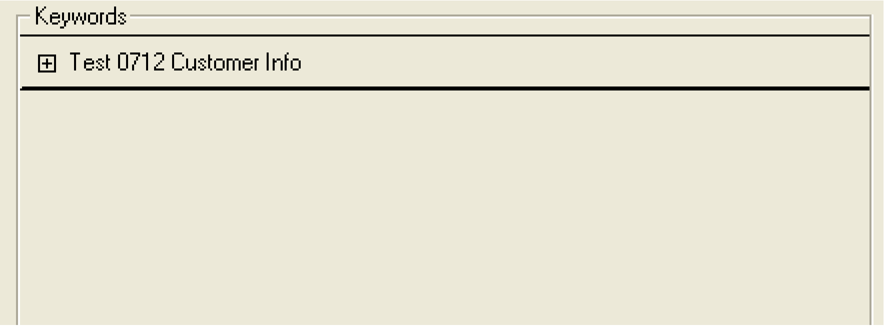
If the Document Type's available Keyword Types are displayed in a collapsed state with a + sign, the Keyword Types are part of a Multi-Instance Keyword Type Group.

See the section titled Multi-Instance Keyword Type Groups on page 44 for how a Multi-Instance Keyword Type Group supports the relationship of Keyword Type Values in retrieval.

Multi-Instance Keyword Type Groups can display in a collapsed state with only the name of the Multi-Instance Keyword Type Group showing, or they can display with the Keyword Values in the Keyword Type Group expanded.

If the Multi-Instance Keyword Type Group is displayed in a collapsed state, click the **Expand** symbol next to the first Keyword Type or press **Ctrl + O** to expand it to show the entire group.





Common Keyword Types for Document Type Groups and Multiple Document Types

If you select a Document Type Group or multiple Document Types, Keyword Types common to all Document Types in the group display in the Keywords section.

For example, if you select two Document Types, one with Keyword Types of **Customer Name** and **Account #**, and the other with **Customer Name** and **Address**, only the **Customer Name** Keyword Type field appears in the **Keywords** section.

Enter Keyword Values for which to search. If you do not enter Keyword Values, the system returns documents regardless of the Keyword Values associated with the documents. In most cases, advanced Keyword Operators can be used to further define your search.

- The **Clear Keywords** button removes text currently entered in the Keyword Type fields.
- The **Clear All** button clears all selected search criteria.

Note: If multiple Document Types are selected that use different Cascading Data Sets, OnBase ignores Cascading Data Sets and their associated Keyword Values are not available. If the Keyword Type in the Cascading Data Set was configured to use a Keyword Data Set, Keyword Values from this Keyword Data Set will be available. If the Keyword Type in the Cascading Data Set was not configured to use a Keyword Data Set, no Keyword Values will be available.

Add Another Value to a Keyword

You can double-click the Keyword Type name to add another instance of the Keyword Type, or place the cursor inside the Keyword Type field and press **F6**.

Note: You cannot add additional instances of Keyword Types that are part of a Single-Instance Keyword Type Group or a Cascading Data Set.

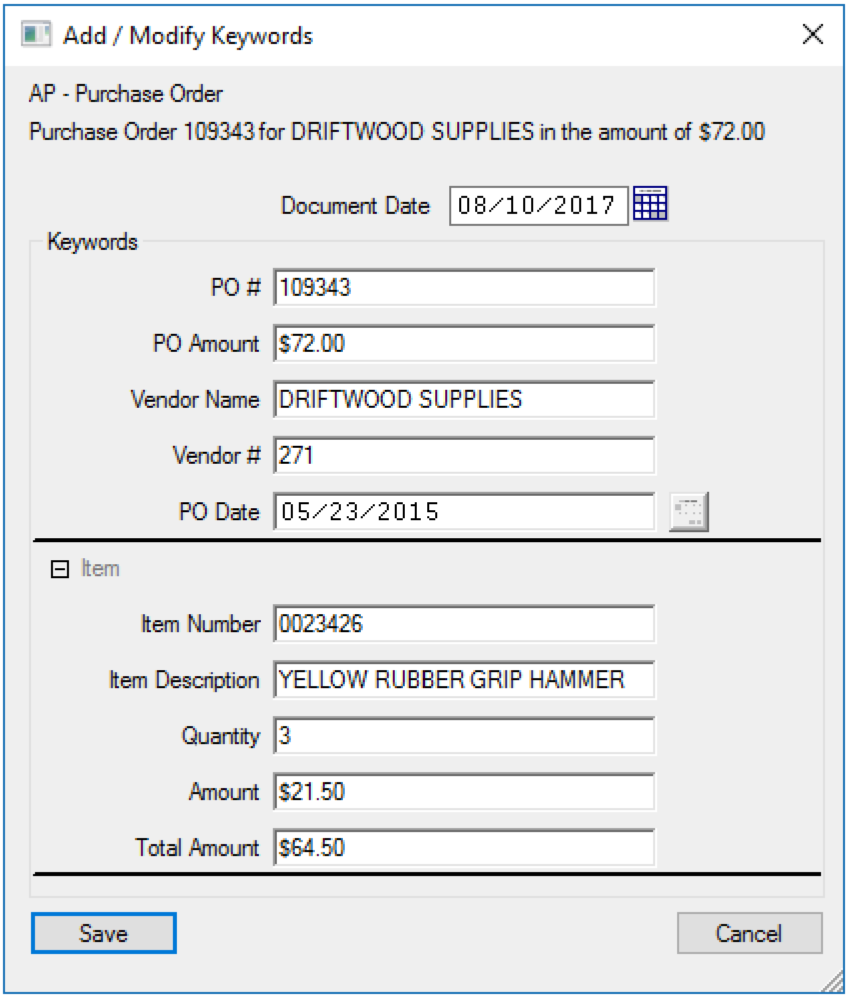
Multi-Instance Keyword Type Groups

If a Multi-Instance Keyword Type Group contains a Cascading Data Set, double-clicking a Keyword Type name or placing the cursor inside the Keyword Value field and pressing **F6** does not add another instance of the Multi-Instance Keyword Type Group. To add another instance of the Multi-Instance Keyword Type Group, double-click the name of the Multi-Instance Keyword Type Group in the **Keywords** pane.

Example of Adding an Instance of a Multi-Instance Keyword Type Group to a Document

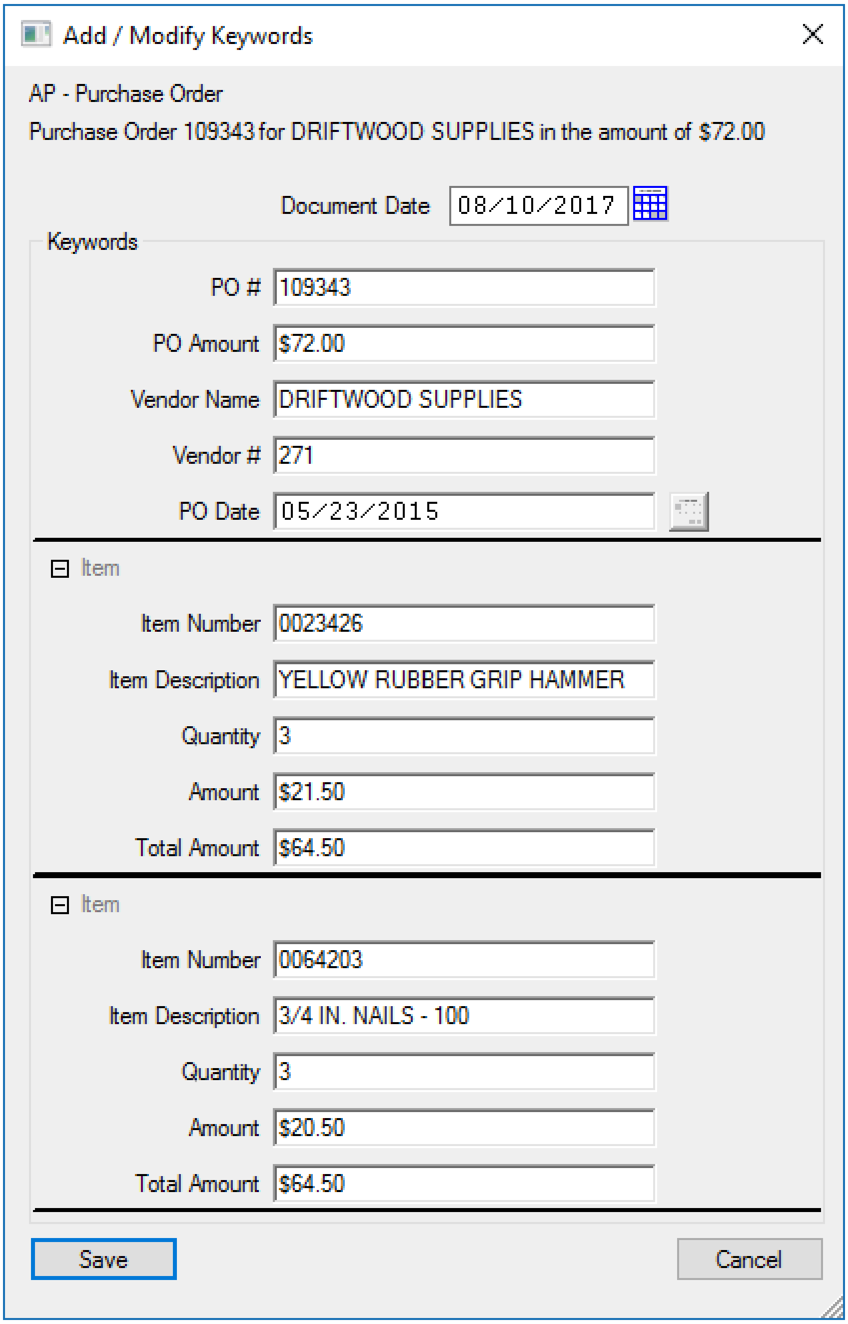
This example uses a Document Type called **AP - Purchase Order**. The Multi-Instance Keyword Type Group called **Item** is applied to **AP - Purchase Order**. A Multi-Instance Keyword Type Group is preferred in this scenario, because a purchase order is likely to contain more than one item, each requiring a separate group of Keyword Values.

The **Item** Keyword Type Group is the group of Keyword Values for each item on the purchase order and contains the Keyword Types **Item Number**, **Item Description**, **Quantity**, **Amount** and **Total Amount**. The example shown in the screen shot below displays an instance of a Multi-Instance Keyword Type Group for the **Yellow Rubber Grip Hammer**.



If you want to record more than one item on an **AP - Purchase Order** document, you can duplicate the Keyword Type Group to add the additional record to the document. The example shown in the screen shot below displays Keyword Values for two different items contained within the purchase order.

Note: It is recommended that you index all Keyword Values, even if only one Keyword Value is different between the original Keyword Type Group record and additional records.



Using Drop-Down Lists

The fields for some Keyword Types may contain a drop-down list. Select any value from this list as criteria for document retrieval. If the Keyword Type field contains any characters, values in the drop-down list are filtered by these characters. Your system administrator determines if a drop-down list appears for a Keyword Type, and what values will be in the list.

If two or more consecutive Keyword Types contain drop-down lists and are ordered in such a way as to show a hierarchical parent/child relationship, the Keyword Types may be part of a Cascading Data Set.

For information about Cascading Data Sets, see Cascading Data Sets on page 42.

Searching on Mixed Case Keyword Values

With Case Sensitive Searching Applied

Whether you are searching for documents through Document Retrieval, cross-references, etc., you must be aware of the case that was entered when the document was indexed. For example, “JOHN ADAMS” and “John Adams” are separate values and will not produce the same results if the Keyword Value is not entered correctly.

Without Case Sensitive Searching Applied

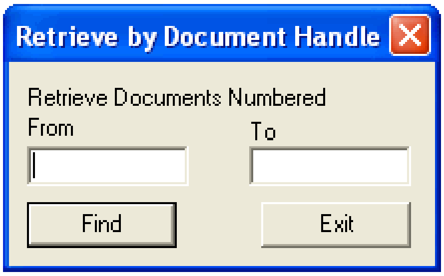
If a Keyword Type does not have Case Sensitive Searching applied to it, then the value you enter on a document will not depend on the case used when indexed. For example, the Keyword Value when indexed is “John Adams”. However, when searching you may type in “JOHN ADAMS” and retrieve the document. In this instance, “John Adams” and “JOHN ADAMS” are not separate values; however, the Keyword Value will display as it was originally indexed.

See your system administrator for details on Keyword Types that may be configured for Case Sensitive Searching.

Retrieve by Document Handle

The **Retrieve by Document Handle** and **Retrieve by File Name** options allow you to retrieve a document or a range of documents using the internal system document number(s), or handle(s). This method of retrieval is typically used by advanced system administrators or technical support representatives during Platter Management analysis or when a document is recovered or needs to be recovered from a tape backup. The Document Handle for a document is displayed in the title bar of the **Document Information** dialog box. To display the dialog box, right-click on the document or the document's status bar and select **Properties**.

To retrieve a document by its handle, select **File | Open | Retrieve by Document Handle** in the Client module. The **Retrieve by Document Handle** dialog box is displayed.



- Type the numeric range of the Document Handles to retrieve in the **From** and **To** fields and click **Find**.
- To retrieve only one document, type the Document Handle in the **From** field or the **To** field and click **Find**.

Note: Document handle searches in the OnBase Client retrieve all documents regardless of Document Type privileges, Security Keyword constraints, and document indexing status. The rationale for this behavior is that users who have privileges to view the document handle from the **Document Properties** dialog box should also have privileges to retrieve the document by its handle. If a document handle search in the OnBase Client retrieves a document that users lack privileges to view, the OnBase Client displays the document in a results list in the following format: **(Restricted): [Document Type Name]**. If the document hasn't been indexed, it is listed as **Unindexed document**. Users cannot open restricted or unindexed documents, nor can they view the document's Keyword Values.

Documents are retrieved regardless of active status. Unindexed documents and deleted documents residing in Document Maintenance are also retrieved when using **Retrieve by Document Handle**.

Refreshing the Document Results List

If a results list does not appear to reflect restored or deleted documents, select the **Refresh** option to update the displayed items on the screen. You can access the **Refresh** option from the Toolbar, or from the right-click menu in the following places:

- Document Search Results list
- Text Search Results list
- Envelopes
- Internal Mail

Keyword Operators and Extended Search Features

Extended Search Features allow you to narrow or expand your document search when retrieving documents.

Enable Keyword Operators on Startup

Select **User | User Options** in the OnBase Client module, or right-click on the desktop and select **User Options** from the menu. The **User Options** dialog box displays.

Select the **Keyword Operators** check box on the **General** tab.

Relational (Comparative) Operators

Relational (comparative) operators allow you to retrieve documents based on a range of Keyword Values, as well as exact Keyword Value matches. Select the Document Type Group and Document Type of the document you want to search for. Click the relational operator button to the left of the Keyword Type field to toggle through the available operators.

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

The following operators may be available to search for:

Operator	Description
=	An exact Keyword Value match.
<>	Keyword Values that are not equal to the specified value.
>	Keyword Values that are greater than the specified value.
>=	Keyword Values that are greater than or equal to the specified value.
<	Keyword Values that are less than the specified value.
<=	Keyword Values that are less than or equal to the specified value.
"	The string literal operator (double quote) used with alphanumeric Keyword Types. Selecting this button will match the literal string. If a wildcard is used in the string, the search will look for the exact match, including the wildcard treated as a standard character.

Note: Available operators vary depending on the Keyword Type. For example, only the =, <>, and " operators are available for alphanumeric Keyword Types.

Logical Boolean Operators

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

You can create an additional Keyword Type field by double-clicking its name or pressing **F6** while your cursor is positioned in the data entry field of the Keyword Type you wish to add. This automatically inserts a logical operator button to the right of the original Keyword Type field.

To change the logical operator in use, click the logical operator button, which scrolls through the available options:

Operator	Description
And	Searches for documents containing the Keyword Values preceding and following the logical operator.
Or	Searches for documents containing either the value preceding the logical operator or the value following the logical operator.
To	Searches for all values that are between the two values (i.e., that are greater than or equal to the first value and less than or equal to the second value). This operator is unavailable for alphanumeric Keyword Types.

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

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

Wildcard Characters

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

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

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

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

Adding Multiple Values to a Keyword Type

You can add additional values to a Keyword Type when retrieving documents or indexing:

- Double-click the Keyword Type name, or
- Place the cursor inside the Keyword Value field and press **F6**

Multiple values of a Keyword Type are saved with documents only if Keyword Type values are populated (in other words, the additional Keyword Type field cannot be left blank). Once you delete the value from an additional instance of a Keyword Type and click **Save**, the additional instance is removed.

You cannot add multiple values to Keyword Types in a Single-Instance Keyword Type Group or a Cascading Data Set. You can add multiple values to Keyword Types in a Multi-Instance Keyword Type Group.

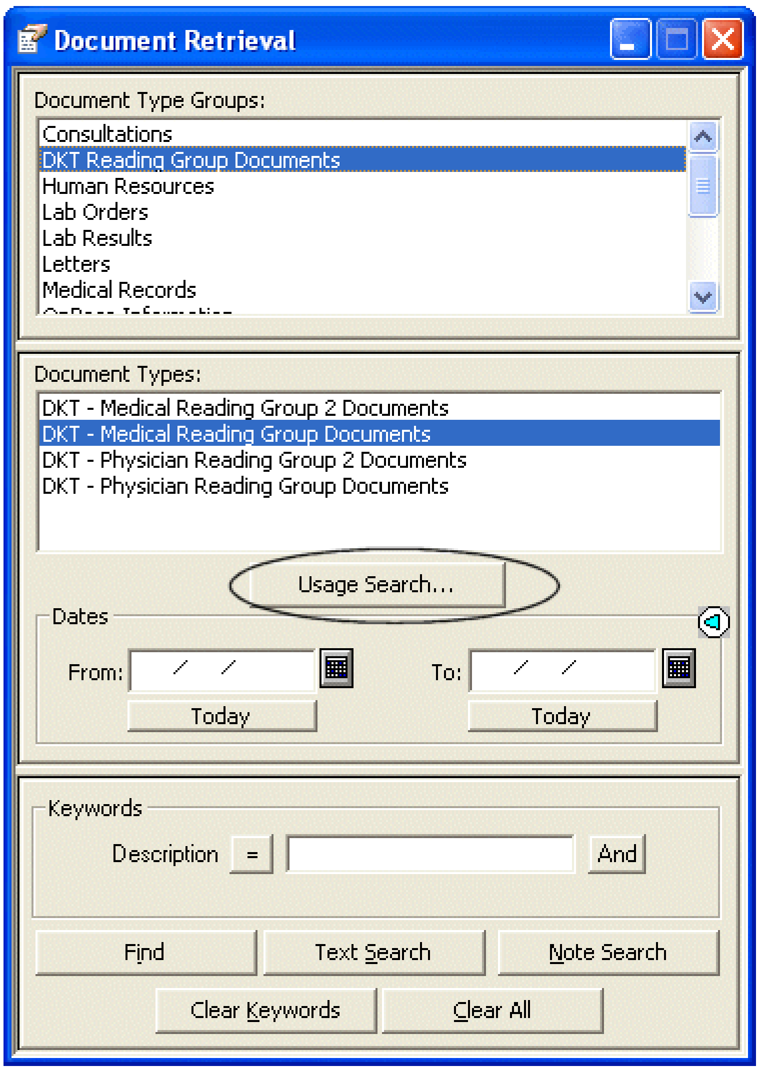
See your system administrator if you have questions about the configuration of Keyword Types on the Document Type.

Note: If you double-click on a Keyword Type name within a Multi-Instance Keyword Type Group, another instance of the entire Multi-Instance Keyword Type Group is added, not just another instance of the Keyword Type.

Note: When documents are indexed with multiple instances of the same Keyword Type, multiple results for the same document can be returned in a Document Search Results list. This occurs because of the way that OnBase searches for multiple Keyword Values.

Executing a Document Usage Search

The **Document Retrieval** dialog box includes a **Usage Search** Usage Search... button that allows you to track the use of selected documents, and determine the document's usefulness.



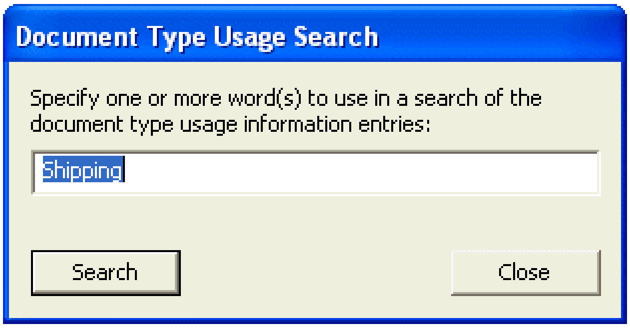
Note: The **Usage Search...** button is not available in the Classic Retrieval Window User Option.

Usage Search results include the following information:

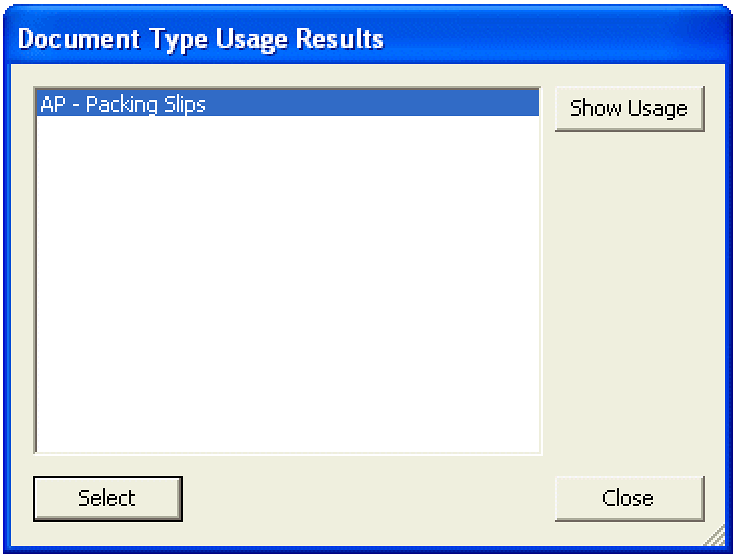
- Departments that typically use the document
- Source of Document
- Business Usage
- Workflows that use this Document

To search for and view the usage data for a selected Document Type:

1. In the Document Retrieval dialog box, select a Document Type Group or Document Type.
2. Click the **Usage Search...** button.
3. The **Document Type Usage Search** dialog box displays. This dialog box requires you to enter values that may be included in usage data for the selected Document Type. For example, you might enter the word **shipping** in order to view departmental access to Packing Slips documents in the Accounts Payable Document Type Group.

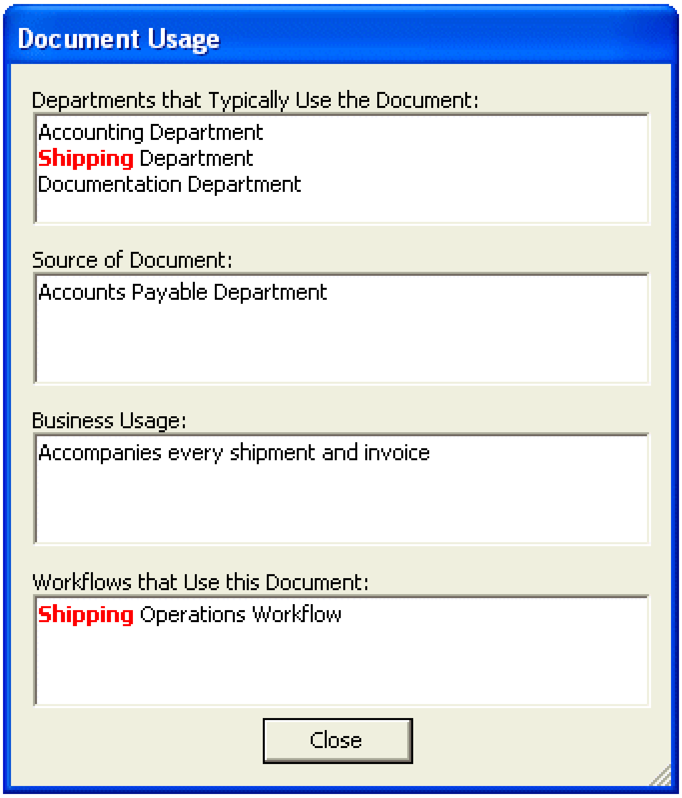


Click **Search**. The **Document Type Usage Search** results window displays.



4. In this example, the search found one usage data set for **AP- Packing Slips**. Select the Document Type and click the **Show Usage** button to view the document's usage information.

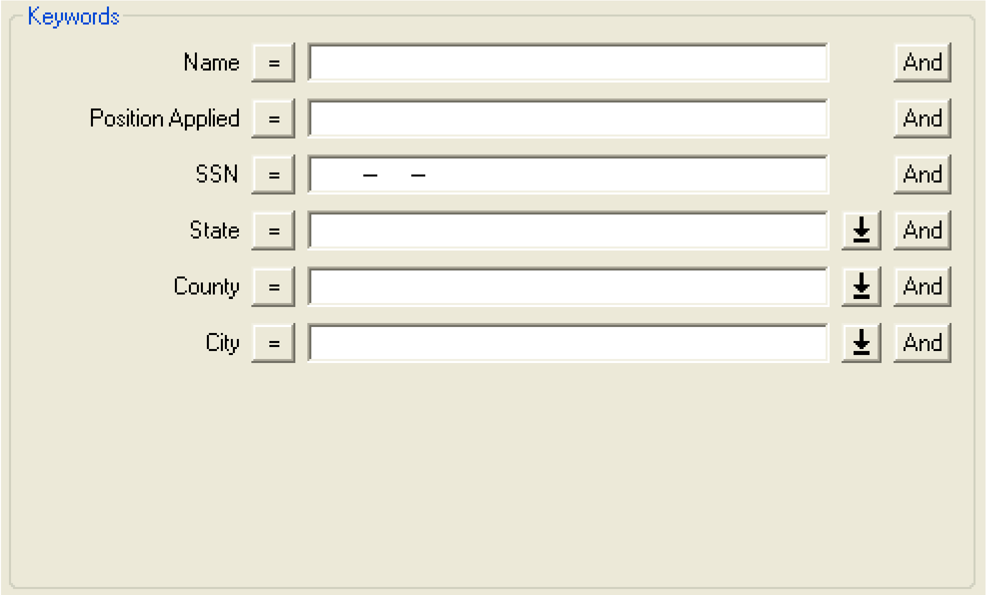
5. The **Document Usage** dialog box displays.



Keyword Types Relationship Examples in Document Retrieval

Cascading Data Set

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



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

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

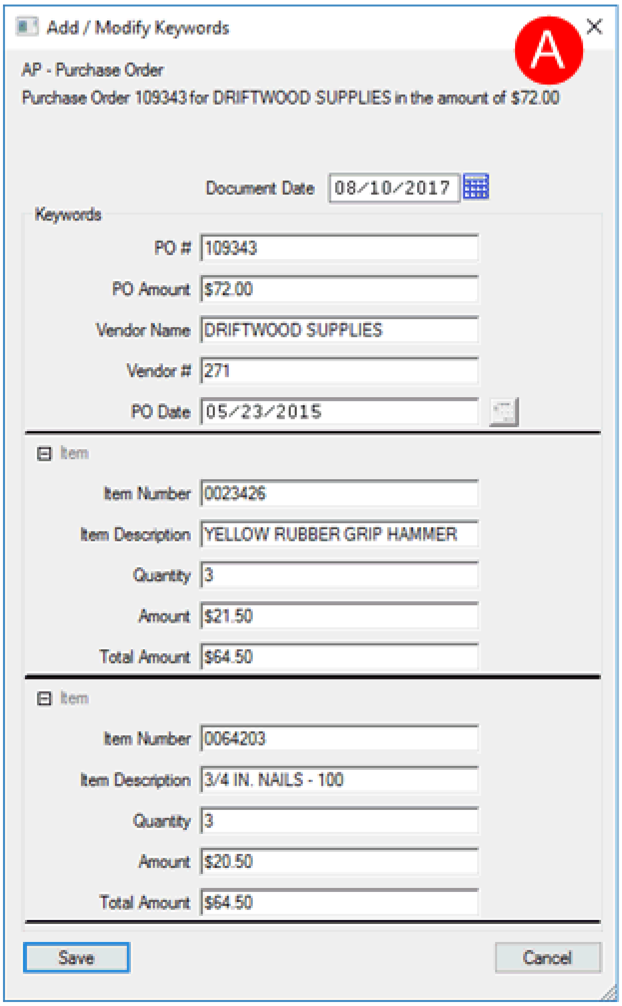
Multi-Instance Keyword Type Group

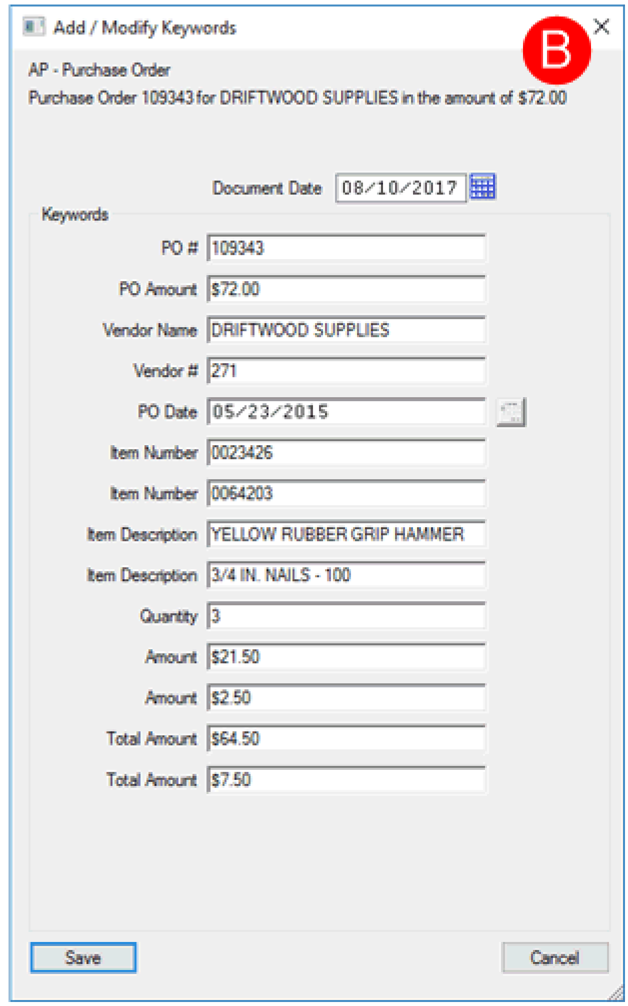
A Document Type called **AP - Purchase Order** contains a Multi-Instance Keyword Type Group called **Item** that includes the Keyword Types **Item Number**, **Item Description**, **Quantity**, **Amount** and **Total Amount**. A Multi-Instance Keyword Type Group was configured for the Document Type, because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

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

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

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

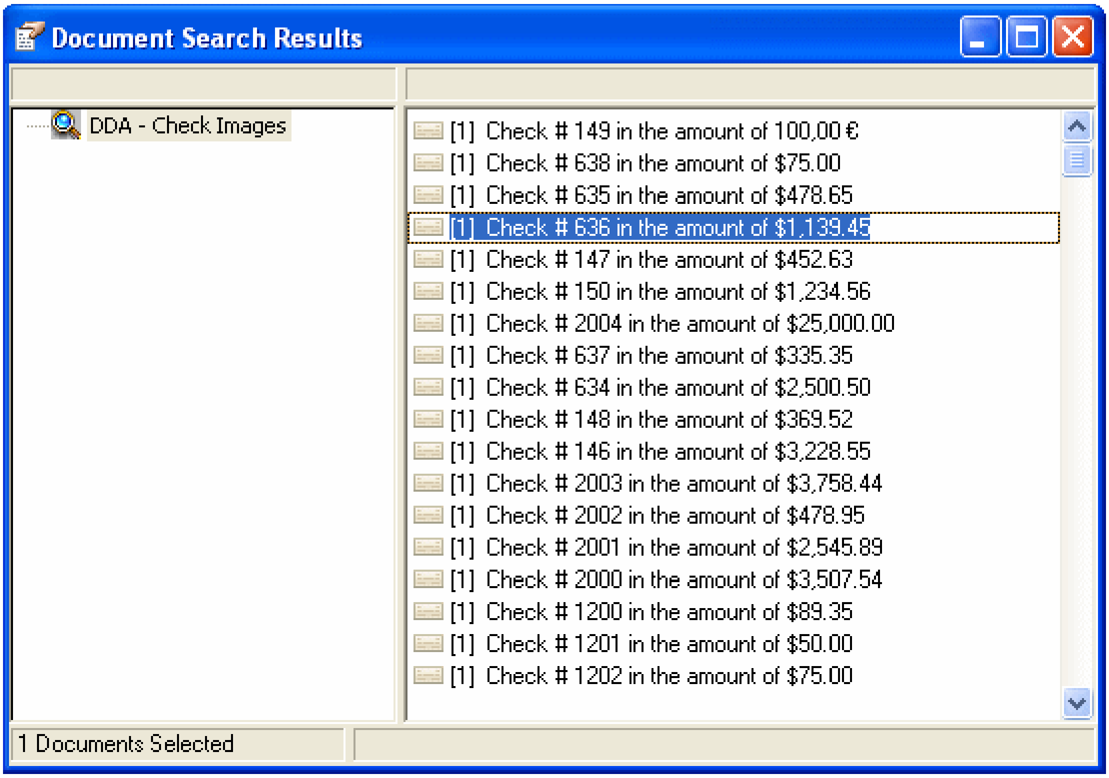




A single document retrieval for both **Item Number** Keyword Value **0023426** and **Item Description** Keyword Value **3/4 IN. NAILS - 100** would not find Document A, since the Keyword Values **0023426** and **3/4 IN. NAILS - 100** are not part of the same Keyword Type Group instance. It would find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

Document Search Results Window

The Document Search Results window lists all documents that match the search criteria you selected in the **Document Retrieval** window.



To retrieve a document using the **Document Retrieval** window:

1. Do one of the following:
   - Select a Document Type Group or a Document Type.
   - Specify search criteria using Keyword Values, text search or note search.
2. Click **Find**. The **Document Search Results** window appears, listing all documents that match your specified search criteria. Use the vertical and horizontal scroll bars to see the full names of documents listed in the window.

To view a document listed in the Results window:

- Double-click a document in the list, or
- Select the **View Selected** option from the right-click menu.

Right-Click Options

Right-click on any document in the Document Search Results list to see all available options. Contact your system administrator if you need access to more options.

Drag-and-Drop Options

Right-click and drag options allow you to drag a document to an envelope, static folder, print queue, or the trash can. The following icon appears to indicate that you have activated right-click-and-drag functionality.

The **Document Search Results** list stays open or minimized until OnBase is closed. Additional document searches are added to the window as you retrieve documents.

Show Folder Locations

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

Note: Ensure you are using the advanced File Cabinets window. This option does not work with the classic File Cabinets window.

From a Document Search Results list or an open document, right-click and select **Show Folder Locations**. All folders where the document resides are displayed in the **Search Results** pane of the File Cabinets window. If the document resides in only one folder, the folder is opened automatically.

Keyword Considerations for Show Folder Locations

The **Show Folder Locations** command uses the document’s Keyword Values to dynamically associate the folder to the document. Missing values will affect whether the correct folders are returned. In the following examples, suppose that two Keyword Types are used to dynamically link a document to a folder.

- If one value is left blank on the document, but not on the folder, the command returns the folder, even though the document doesn’t reside in it.
- If one value is left blank on the folder, but not on the document, the command does not return the folder, even though the document dynamically resides in it.
- If a folder is indexed with multiple instances of a Keyword Type Group, the **Show Folder Locations** command will retrieve the folder only from documents indexed with values that are in the same instance of a Keyword Type Group on the folder.

  This behavior occurs only if Keyword Types in the folder’s Keyword Type Group are used to dynamically link the document to the folder, and if the Keyword Types are not in a Keyword Type Group on the document.

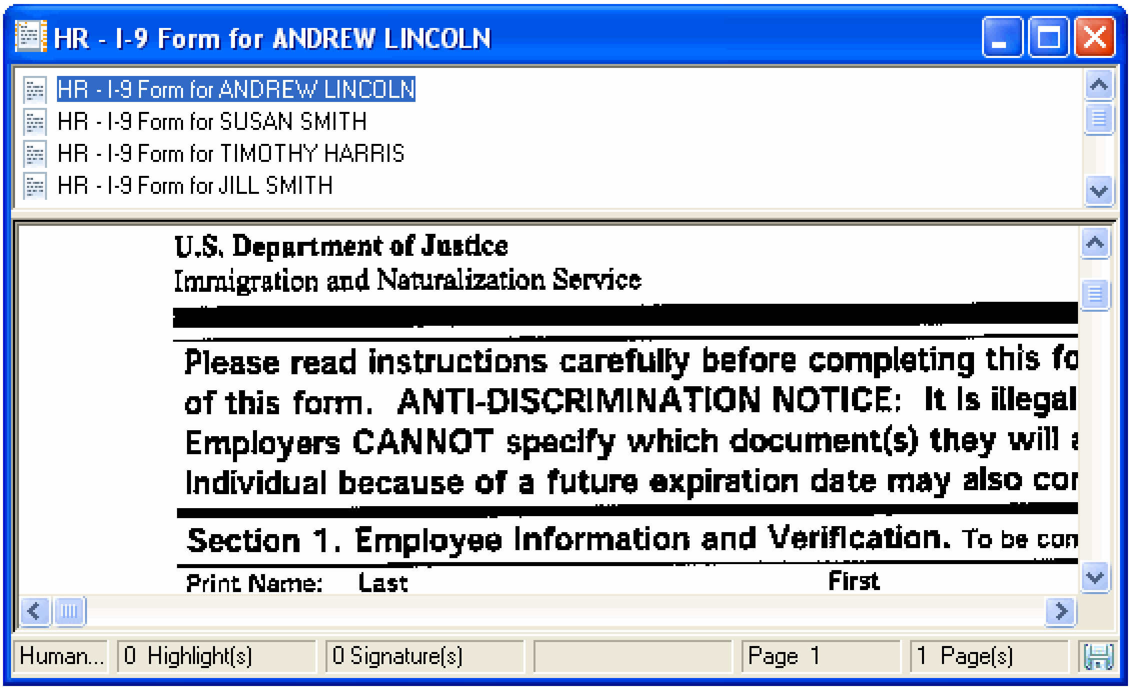
Launching the Viewer Window

When retrieving documents from the **Document Search Results** dialog box, you may preview the files through the Viewer Window.

The Viewer Window has a split screen that is comprised of a search results list and a viewer window, allowing you to view the document before opening it.

To launch the viewer:

1. From the left-hand side of the **Document Search Results** dialog box, right-click on your search.
2. Select **Launch Viewer**. The **Viewer Window** is displayed.



Note: All right-click menu options and Client Toolbar buttons are still available from the Viewer Window, but only affect the document that displays in the Viewer Window and not in the search results list.

Launching the Thumbnail Viewer

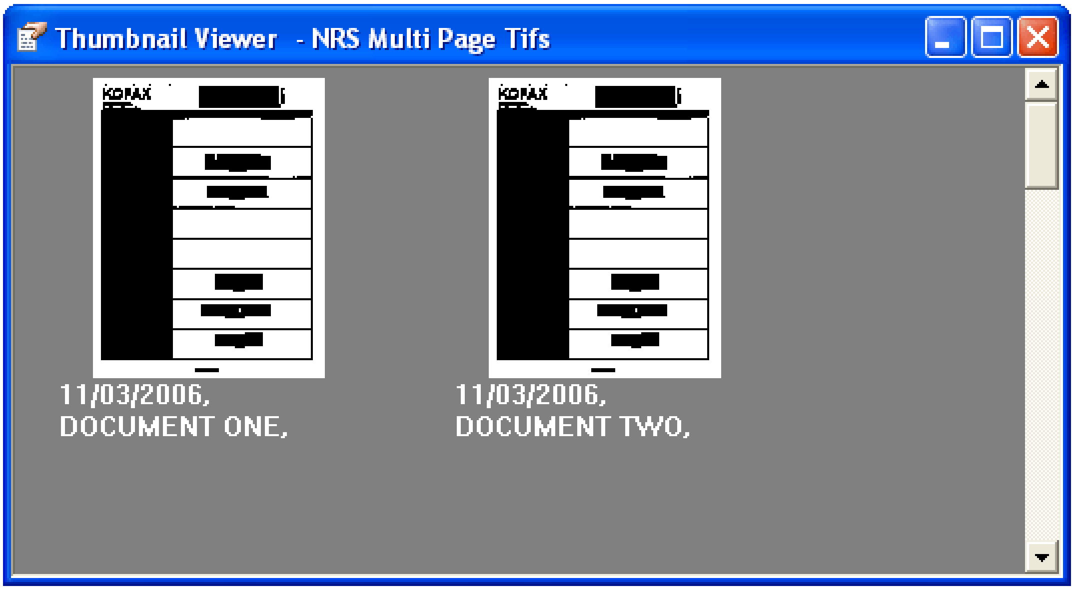
Depending on your system's configuration, you may be able to use the Thumbnail Viewer when viewing an image document.

When retrieving image documents from the **Document Search Results** dialog box, you may preview the files by viewing the thumbnail version of the first page of each image document.

The Thumbnail Viewer window displays all thumbnails available for the image documents in the hit list.

To launch the viewer:

1. From the left-hand side of the **Document Search Results** dialog box, right-click on your search.
2. Select **Thumbnail Viewer**. The **Thumbnail Viewer** window displays.

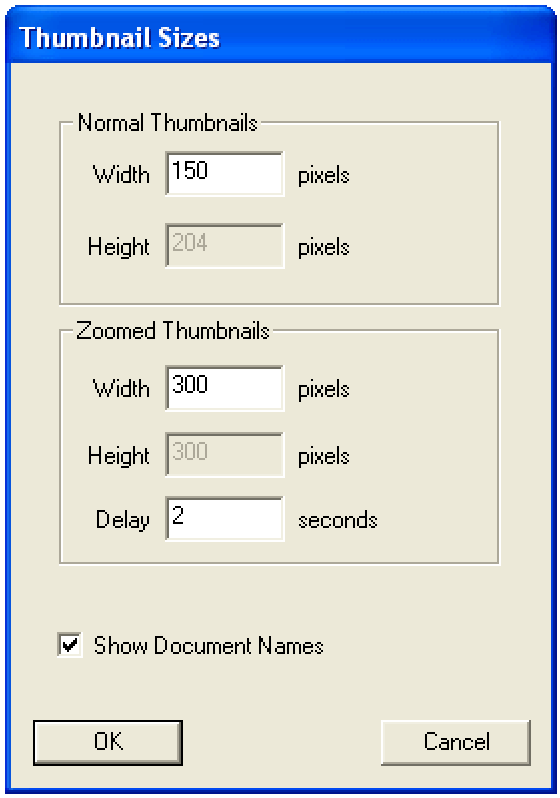


3. Double-click a thumbnail to open the document. The area below the open document displays the thumbnails for the remaining pages of the open document.

Caution: For document images that are configured to have a thumbnail created on commit and then viewed with the Thumbnail Viewer, the following statement applies: Once the document is committed and the thumbnail rendition has been created, the Client makes no attempt to update the thumbnail rendition if the first page is deleted or somehow modified. If the thumbnail rendition exists, this is what the thumbnail hit list viewer will display, even if it happens to be the wrong first page because the document was altered after it was committed.

Modifying Thumbnail Options

1. From the Thumbnail Viewer, press **S**.
   The **Thumbnail Sizes** dialog box displays.



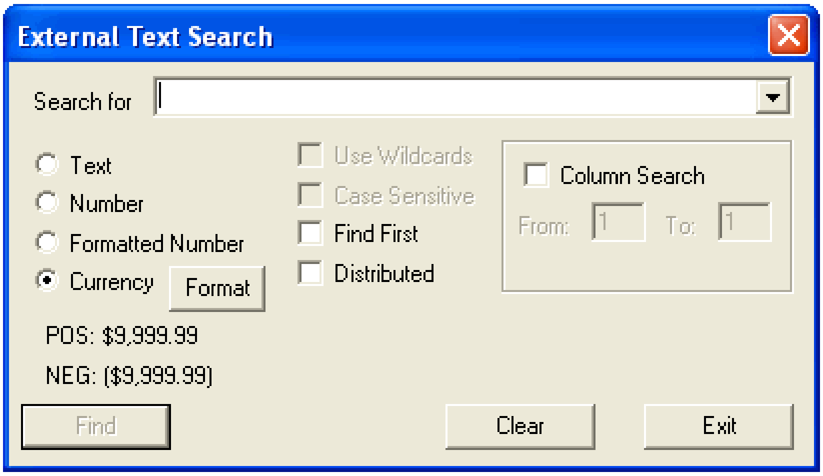
2. Set the desired **Width** and **Height** for the thumbnails.
   You can set both the **Normal Thumbnails** size (the default thumbnail view) and the **Zoomed Thumbnails** size.
3. In **Delay**, type the number of seconds you want to hover your cursor over a thumbnail before the zoomed thumbnail displays.
4. To display the document name below each thumbnail, ensure **Show Document Names** is selected.
   Deselect this setting if you do not want to display document names below each thumbnail.
5. Click **OK** to save your changes.

External Text Search

The External Text Search function allows you to search for text across text-based documents. The Text Search Results list displays documents that contain the search string, as well as the number of times that search string occurs in each document. When you open a document from a hit list, OnBase highlights the search string in the document.

Conducting an External Text Search

1. From the Document Retrieval dialog box, select the Document Type(s) you want to search.
2. From the **Document Retrieval** dialog box, click **Text Search**.
   The **External Text Search** dialog box displays.



3. Define your search options.
   For more information, see Text Search Options on page 304.
4. In the **Search for** field, type the text string you want to search for.

Note: If your document contains different types of Space characters (such as Ideographic Spaces), your search string may not be correctly highlighted in the document.

5. Click **Find**.
   A status bar displays the search's progress. To cancel the search, click the **Cancel** button.
   When the search is complete, the Text Search Results list displays.

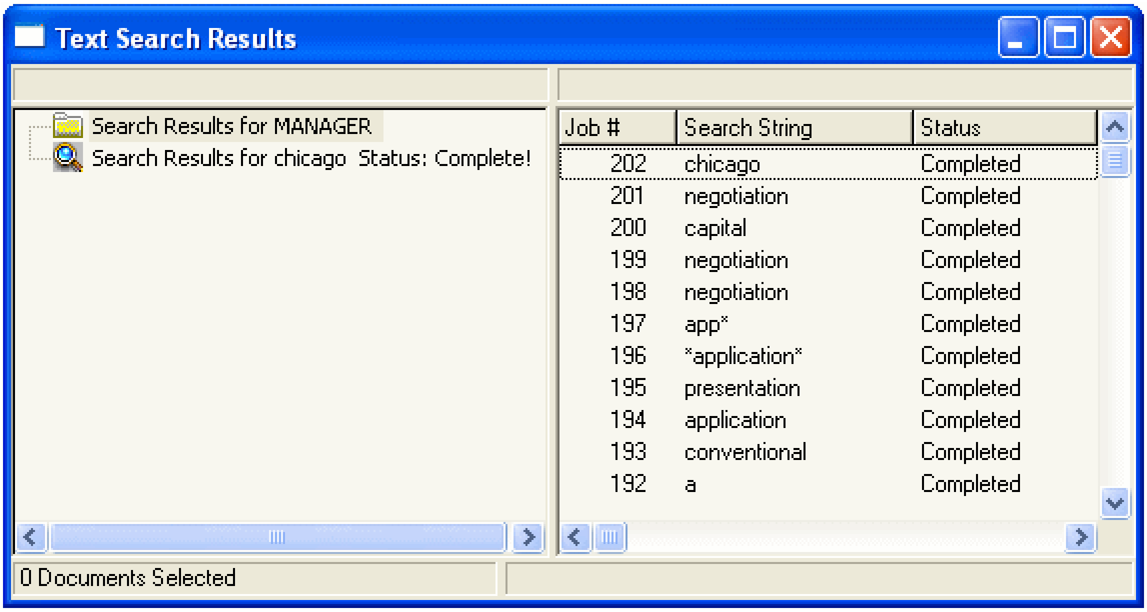
Note: External Text Search results can be accessed by selecting **User | Text Search Results**. Search results from previous sessions are available.

The Text Search Results Window

The **Text Search Results** list displays after a search has been completed. The left side of the window displays your user name. The right side of the window displays the **Job Number**, **Search String**, and **Status**.

- The **Job Number** is a unique number identifying the search.
- The **Search String** is the text string for which to be searched.

- The **Status** in the **Text Search Result** dialog box indicates whether or not the job search has been completed. When a search has been completed, the status is **Completed**. An **In Progress** status indicates a distributed text search with results that have not yet been returned.

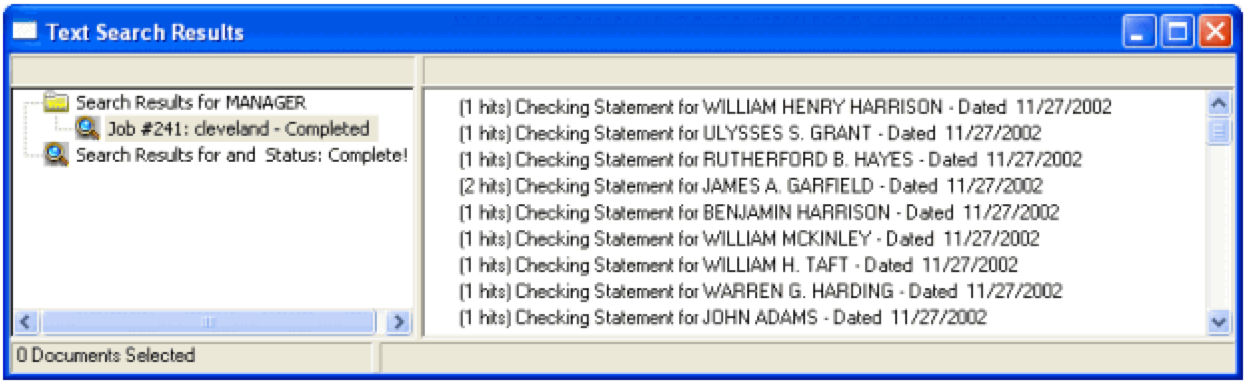


Viewing Text Search Results

To view Text Search Results,

1. Double-click on the job number or search string you want to view.

   The Text Search Results list displays documents containing the search string as well as the number of times the search string occurs in each document.



2. Double-click a document from the list to display a list of all occurrences of the search string in the document. From here, you can also right-click and drag a document to an Envelope, Folder, or to the EDM Briefcase (if licensed).
3. Double-click an occurrence of the search string. The document opens with the selected occurrence of the search string highlighted.

Considerations for Viewing Text Search Results

When opening a text search result, consider the following:

- The search string may not be correctly highlighted in the document when the document contains one or more **Tab** characters.
- The search string may not be correctly highlighted in the document when the document contains double-byte characters (for example, Japanese and Chinese characters).
- The search string may not be correctly highlighted in the document when the document contains different types of **Space** characters (such as Ideographic Spaces).
- The search string is not highlighted when the search string text is outside the viewable area. A plus sign (**+**) at the end of the row the text appears in is highlighted, indicating the text exists and was found in that row but cannot be displayed. For more information on the viewable characters per line, see your system administrator.
- Depending on the configured characters per line, when resizing the viewer on an opened result, the highlight may be removed from the search string or plus sign (**+**).
- The image rendition for the document may be opened instead, depending on system settings. For more information on rendition display behavior, see your system administrator.

Right-Click Options

If you have sufficient privileges, the following right-click options are available in the Text Search Results list when one or more jobs, documents, or hits are selected:

- **Create Report** creates a report of the search results, which is stored in the **SYS - Search Reports** Document Type. For more information, see Generating A Report on page 311.
- **View Selected**, when selected from the:
  - Job list, displays a list of documents returned by the search.
  - Document list, displays a list of hits for the selected document.
  - Hit list, opens the document with the selected hit for the search string highlighted.

Note: If your document contains one or more **Tab** characters or different types of **Space** characters (such as Ideographic Spaces), your search string may not be correctly highlighted in the document.

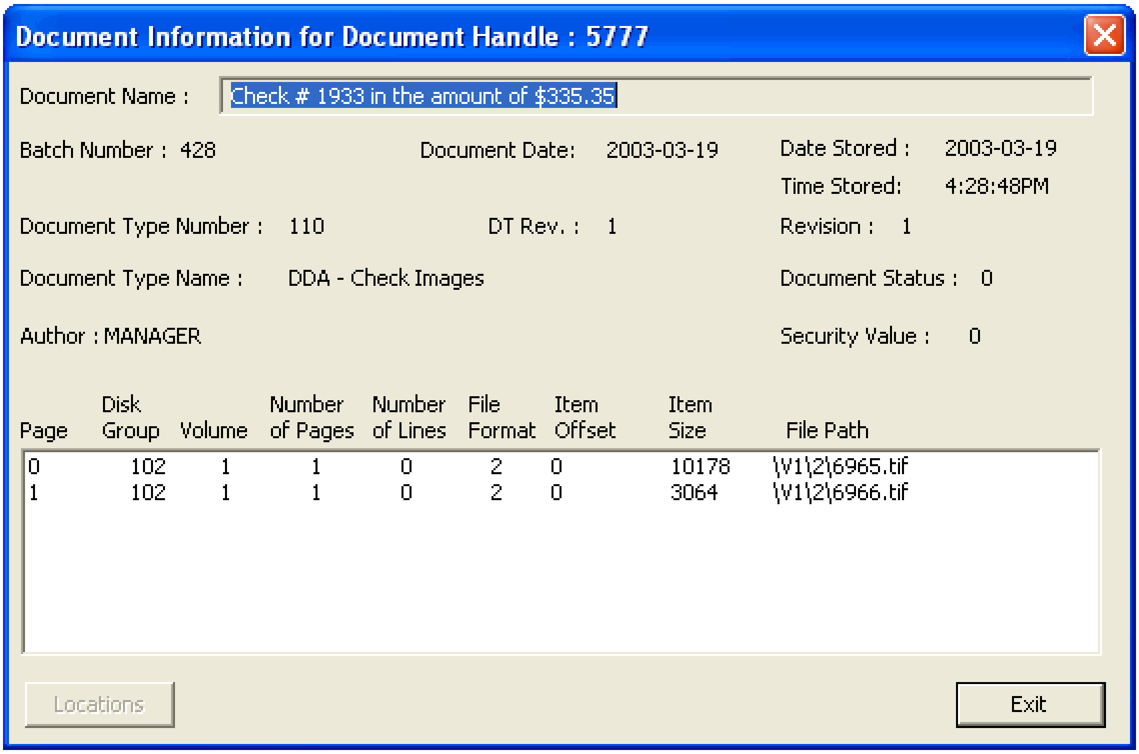
- **Clear Selected** clears/deselects the selected items.
- **Delete Selected** removes the text search result from the Text Search Results list.
- **Print | Print Selected** prints the selected document(s) from the Text Search Results list.
- **Print | Print All** prints all documents from the Text Search Results list.

- **Refresh** updates the Text Search Results list.

Note: External Text Search Results are stored in the database and can be accessed by selecting **User | Text Search Results**. Text Search Results are “cross-session,” which means the search results from previous sessions are available when you log back on to the system.

Viewing Document Properties

The properties of a document display in the **Document Information** dialog box.



View the **Document Information** dialog box several ways. Select a document from a document retrieval list or open a document and perform one of the following actions:

- Click the **View Document Information** Toolbar Button.
- Right-click and select **Properties**.
- From the main menu bar, select **Document | Properties**.

The **Document Information** dialog box contains a variety of information regarding the document.

Document Properties

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

Property	Description
Document Handle	The document number assigned to the document when it was brought into the system. This is the only place in the system where the internal document handle for a document is displayed. The document handle can be used to retrieve a specific document and to troubleshoot problems with the document.
Document Name	The Auto-Name string of the document.
Batch Number	The number of the batch in which the document was brought into the system. A batch number is displayed if the document was brought into the system through a process such as COLD.
Document Date	The date used by the system to refer to the document. This date is used during searches limited by date. The document date is assigned to a document during import. **Note:** If the **Import Document** dialog box has been open overnight, the system date and Document Date may reflect the previous day's date. If this has occurred, close and re-open the **Import Document** dialog box so that the correct Document Date is stored.
Time Stored	The time at which the document was imported or indexed into the system. You cannot search for documents based on the time stored.
Date Stored	The date on which the document was imported into the system. If an invoice from December 28, 1996 was brought into the system on March 11, 1997, December 28, 1996 is the document date and March 11, 1997 is the date stored. This date is used for internal tracking. You cannot search for documents based on the date stored.
Document Type Number	The internal number associated with documents of this Document Type.
Document Type Name	The name of the Document Type to which the document belongs. Very long Document Type names are displayed as truncated in this field.

Property	Description
Document Status	Displays the document's position in the system. If the document is retrievable, a status of **0** is displayed. If the document is in the system, but not yet available for retrieval, a status of **1** is displayed. If the document has been deleted, a status of **16** is displayed.
DT Rev	Displays which revision of the Document Type the document is using. Different Document Type revisions can have different configurations.
Revision	If the document is revisable, the **Revision** field displays the latest revision number of the document. For non-revisable documents, this field is always set to 1.
Author	The name of the user who processed the document into the system.
Security Value	For internal use only.
Page	The internal page number for a document. Page numbers start at 0, and are indicative of the number of files used to display the document. Text documents typically have only one page, while image documents typically have several. Virtual E-Forms have no pages, so on a Virtual E-Form this field would display the tag **<Virtual E-Form>** instead of a page number.
Disk Group	The number associated with the Disk Group in which the document is stored.
Volume	The volume number in the Disk Group in which the file is stored.
Number of Pages and Number of Lines	The characteristics of the document within the file. These values are useful for text documents. Non-text documents display the number of pages as **1** and the number of lines as **0**.
File Format	The number associated with a configured file format. This number determines how a document is displayed and printed.
Item Offset and Item Size	Describes the physical storage of the document within the file. The **Item Offset** is the byte offset into the file for the starting point of this particular document. The **Item Size** is the number of bytes in the file that make up this document.

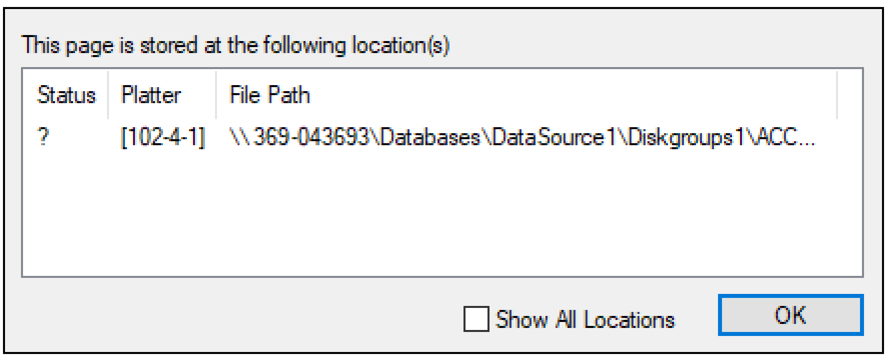
Property	Description
File Path	Lists a partial path to the document. The beginning of the path depends on the location configured for the document's Disk Group.

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

Document Properties - Locations

From the **Document Information** dialog box, the complete path of the exact file location is displayed.

Select the file information and click **Locations** or double-click on the file information to display the **Platter Locations** dialog box, which displays every location where the system maintains a copy of this page/file for the Disk Group. This is a complete path that allows you to determine the exact file location.



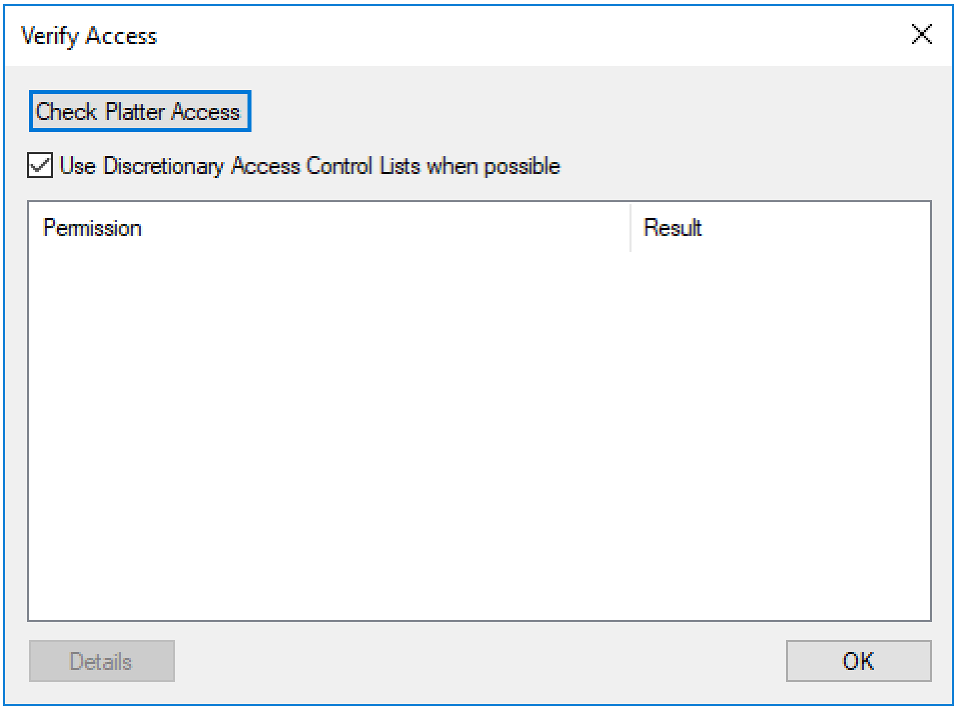
The following right-click options are available:

Option	Description
Copy	Select to copy the file path to your clipboard.
Show Hidden Shares	Select to display hidden shares.
Obscure Hidden Shares	Select to obscure hidden shares.
Verify File Is Online	Select to verify that the file is online. If the file is online in the specified location, the status is set to **OK**. If the file is no longer online in the specified location, the status is set to **NO**.
Open Containing Folder	Select to open the folder in which the file is located.
Verify Access	Select to verify access to the file location. For more information, see Verify Access on page 70.

Option	Description
Save File Unaltered	Select to save the file unaltered. The **Save As** dialog box is displayed. Enter or browse to a location to save the file and click **Save**.

Verify Access

The **Verify Access** dialog box is accessed by right-clicking on a platter copy and selecting **Verify Access**. The **Verify Access** dialog box allows the user to check their permissions on the selected platter copy.



Click **Check Platter Access** to see a list of all applicable permissions and the access levels granted to the current user for each of these permissions. The **Use Discretionary Access Control Lists when possible** option is activated by default. When this option is selected, Verify Access uses access control lists to determine if the permissions are granted. When the option is deselected, Verify Access attempts to perform each of the actions as applicable to each permission and reports on the success or failure of each.Once you have clicked **Check Platter Access**, a list of permissions is displayed with results. For additional details on how access levels were determined, click **Details** to view the specific actions and checks performed for each access checked.

Once you have determined the levels of access available, click OK to close the Verify Access dialog box.

Using Custom Queries

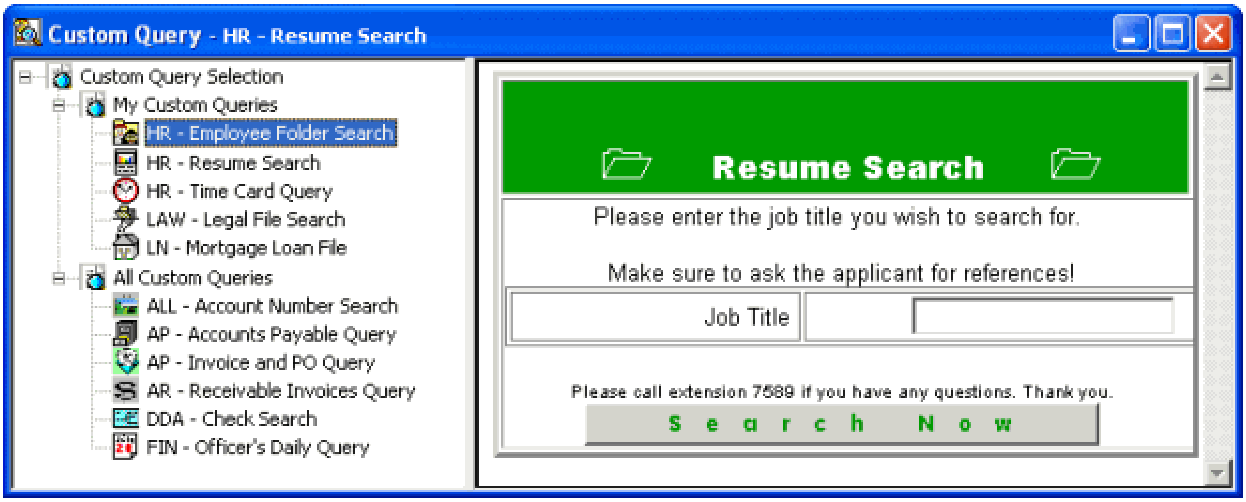
You can also retrieve documents by using Custom Queries. Custom Queries are predefined sets of search criteria that allow you to quickly access frequently retrieved documents.

Note: Display Columns will not be respected when performing Text Search. Text Search results will be displayed in the External Text Search Results list window.

To search for a document by using a Custom Query, follow these steps:

1. Click the **Open Custom Queries** toolbar button or select **File | Open | Custom Query**.

   The **Custom Query** window is displayed.

   The left pane displays two tree lists:

   - My Custom Queries
   - All Custom Queries

   The right pane displays your **Default Custom Query**, which is the first Custom Query listed in the **My Custom Queries** list.
2. To open a Custom Query, click on a query in the **My Custom Queries** list or the **All Custom Queries** list. The Custom Query is displayed in the right pane.
3. In most cases, the Custom Query includes a set of instructions. Follow the instructions and enter search criteria in any available text fields.

4. Click **Find**, **Search**, or any other submission button available. The **Custom Query Results** list is displayed.

Note: Each row in the **Custom Query Results** list displays a maximum of 300 characters.

The Custom Query windows and the columns within the Custom Query Results list are re-sizable. Once a column is re-sized, that column retains that size until you re-size it again or the configuration of the Custom Query has been changed by an administrator.

Note: If a Keyword Type that is used as a display column has more than one value for a document or folder, the document or folder will be listed for each Keyword Type Value. If **Note Contents** is used as a display column and multiple notes exist on a document, the document will be listed for each note.

5. Double-click on the document you are searching for to open the document.

Note: For more information on using Custom Queries, see Using Custom Queries (Advanced) on page 90.

Viewing Documents

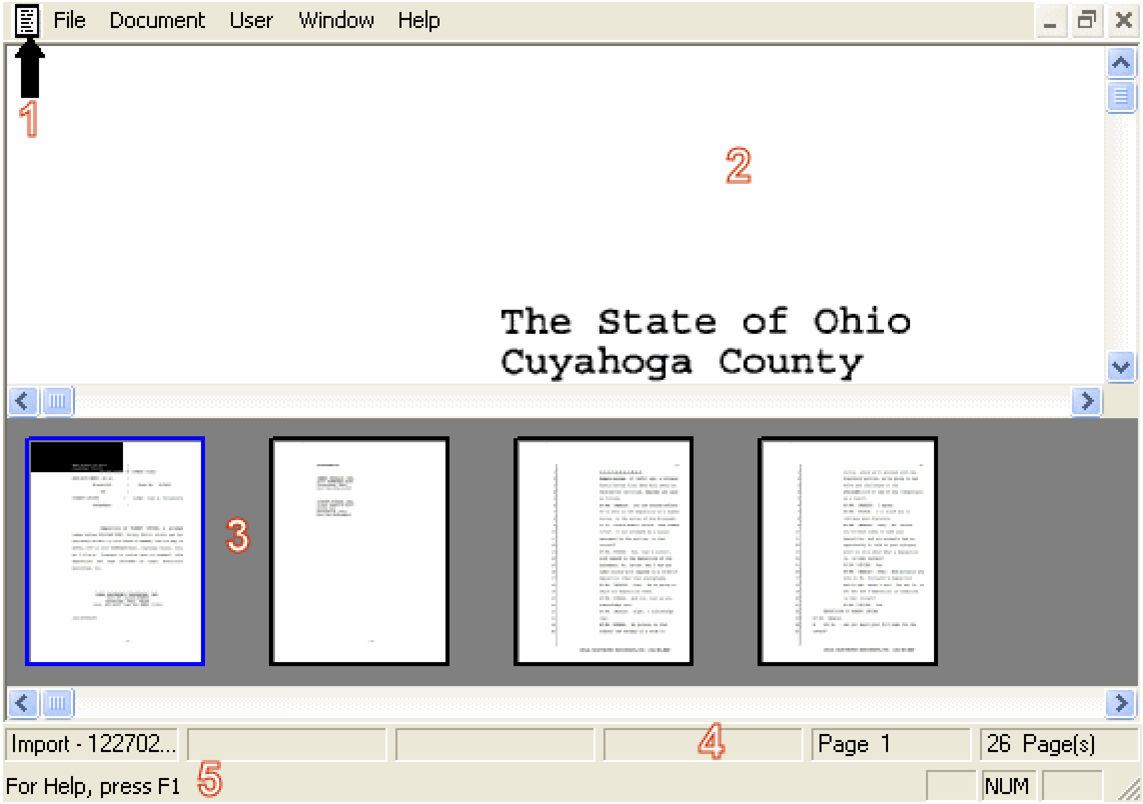
When you click a document from a search results list, it opens up in the Document Viewer in the OnBase Client module. If insufficient resources are available to display an image document at its original resolution, the image is displayed at a reduced quality and the Status Bar indicates **Quality Reduced**.

From an open document, you can access a variety of options, such as emailing the document, viewing its Keyword Values, adding notes to it, etc. (based on your product rights and privileges).

Note: Depending on your system setup and the types of documents you are viewing, you may not have access to all options. Contact your system administrator if you have questions.

The Document Viewer functions may be accessible from different areas of the viewing window (see the graphic below for a description of the parts of the Document Viewer).

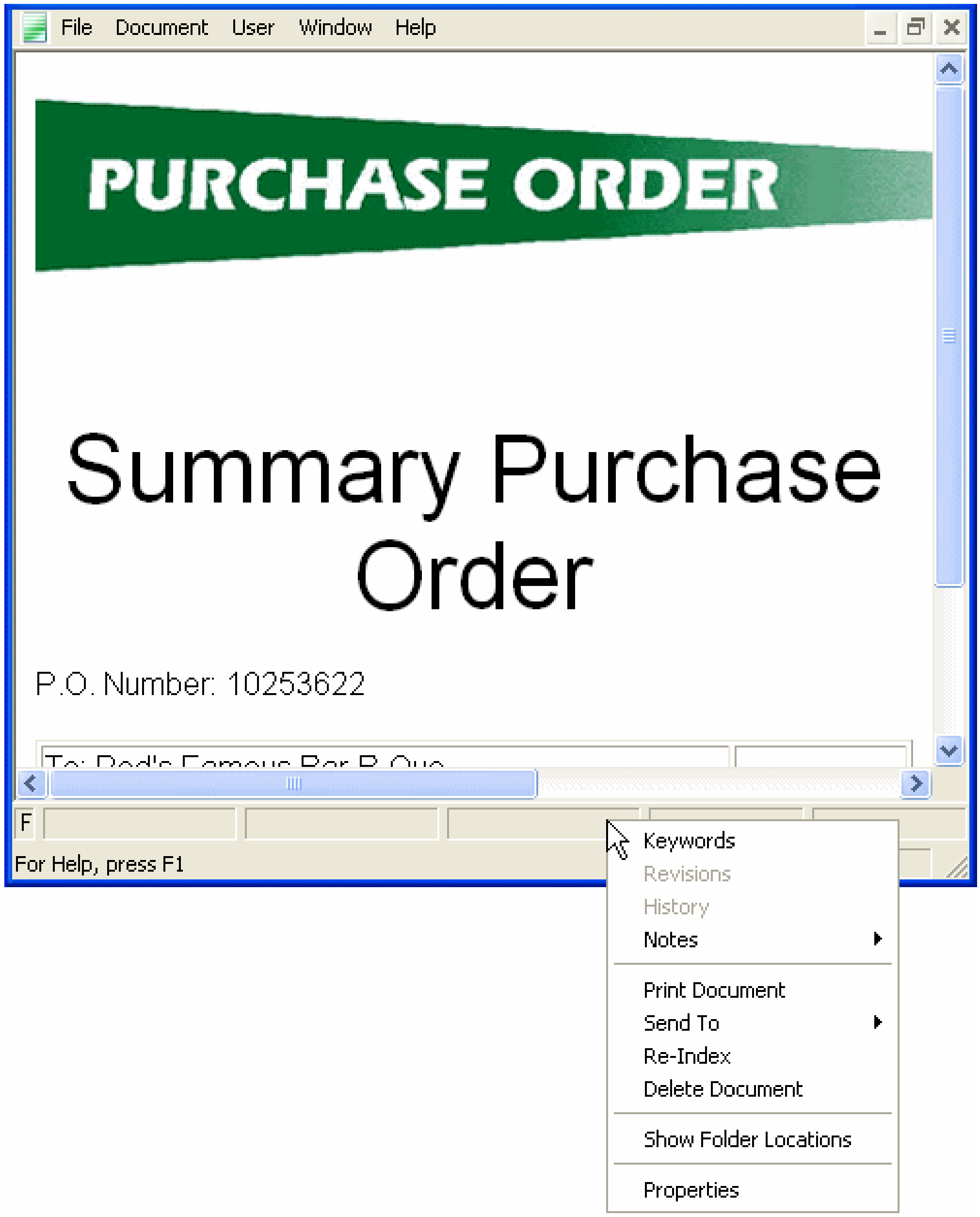
Note: Some options are available from right-click menus, the **Document** menu and the **Toolbar**. Some options are also available when you select one or more documents from a **Document Retrieval List**. See your system administrator for additional information about the options available to you.



1. **Document Options Icon** - Found in the upper-left corner of the title bar. Click this icon for available options.
2. **Main Document Window** - This is where the open document displays. From an open document, you can access options from the toolbar buttons, the Document Options icon, or by right-clicking on the main document window or Status Bar.
3. **Thumbnail Window** - For image based documents you can elect to display thumbnails in the Thumbnail window. The **Image Thumbnails** section in the **Document** tab of **User Options** provides settings for this window.

4. **Status Bar** - The Status Bar provides information about the open document, such as its location, the name of the user who has the document checked out, the number of notes and highlights in the document, the current page number, and the total number of pages. Right-click on the Status Bar to access document options.

Note: The Status Bar takes into account any suppressed pages contained within an image document. For example, if you are viewing a 10-page document, but only pages 1-3 and 7-10 are being displayed in the viewer, the Status Bar indicates there are **10 Page(s)** in the document. The current page number is the actual page number of the document. Using the example above, although the last page is only the seventh page displayed in the viewer, the Status Bar would correctly indicate you are viewing **Page 10**. For more information on suppressed pages, see your system administrator.



Double-click the **Note(s)** field of the Status Bar to display the **Select Note** dialog box, which lists all document notes and descriptions.

5. **System Window Status Bar** - The System Window Status Bar is located at the bottom of the main system window under the document Status Bar. The System Window Status Bar displays context-sensitive help in the left corner, and whether or not the Caps Lock, Number Lock or Scroll Lock keys are enabled on the keyboard in the right corner.

   You can elect to display the System Window Status Bar by selecting **Status Bar** in the **General** tab of **User Options**.

Viewing Microsoft Office Documents

Depending on your configuration, Microsoft Word, Excel, and PowerPoint documents are displayed either using the standard Document Viewer or the Integrated Office Viewer. If your system is configured to use the WOPI endpoint to connect to the Microsoft Office Online Server or Office for the web (Office 365), the Integrated Office Viewer is used to display read-only versions of Microsoft Office documents. For more information about the Integrated Office Viewer, see your system administrator.

To use the standard Document Viewer to display a document, from an open document, select the Document Options Icon in the document title bar and select **Launch Legacy Viewer**.

Note: Once you select this option, you cannot return to the Integrated Office Viewer until you close and reopen the document.

To use the Office Business Application to display a document, from an open document, select the Document Options Icon in the document title bar and select **Launch Office Business Application** option.

Note: This option is only available if you are licensed for one of the Office Business Application modules.

Supported File Types with the Integrated Office Viewer

To view and edit some of the supported document types in OnBase using the OnBase Integrated Office Viewer, the OnBase WOPI endpoint must be configured to integrate with the Microsoft Office Online Server or Office for the web.

This table shows the file-access level for OpenDocument and Microsoft Office documents that are displayed in the OnBase Integrated Office Viewer in the OnBase clients.

File Type	Microsoft Office Online Server or Office for the web
Microsoft Excel	
ods	view and edit
xls	read-only
xlsb	read-only
xlsm	read-only
xlsx	view and edit
Microsoft PowerPoint	
odp	view and edit

File Type	Microsoft Office Online Server or Office for the web
pot	read-only
potm	read-only
potx	read-only
pps	read-only
ppsm	read-only
ppsx	read-only
ppt	read-only
pptm	read-only
pptx	view and edit
Microsoft Word	
doc	read-only
docm	read-only
docx	view and edit
dot	read-only
dotm	read-only
dotx	read-only
odt	view and edit

Viewing XML Documents

The way your document is displayed is dependent on the style sheet(s) it is associated with.

Note: The XML Document Viewer's default display options are controlled by the OLE Window options. These options are displayed on the Document Tab of the **Workstation Options** dialog box. For more information, see Modifying User Options: The Document Tab on page 337.

XML Documents Types can be associated with .xsl style sheets two different ways:

- By Document Type
- Keyword - Based

In both types of XML Documents, a properly configured XML Document type contains at least one configured **XML Style Sheet**. The XML Style Sheet contains viewing, printing and emailing information for the document. Your document may be set up to display in the system one way, and to print another way.

Depending on the Document Type settings, you may also have the option to select from multiple XML Style sheets in an open document.

Viewing XML Documents with Style Sheet Based on Document Type

- Documents open with the default XML Style Sheet. If you want to associate a different XML Style Sheet than the default, select one from the **System Menu Options**. (If you have more than one style sheet associated with this document, the default XML Style Sheet is the first one in the list). When you close and open the document, it will open with the Default Style Sheet.
- If you want to display only the .xml code (without a style sheet) select **No Style Sheet** from the System Menu Options.
- If the document opens without a Style Sheet applied (only the .xml code displays) you can select the desired Style Sheet from the System Menu Options.

Viewing XML Documents with Style Sheet Based on Keyword Type

- Documents open with the Style Sheet that is configured for the Keyword Type Values of the document. You do not have the option to select a different style sheet, unless you change the Keyword Value whose Keyword Type this document is based upon. If you change this Keyword Value, the document is re-indexed and saved the system with the new Keyword Value and style sheet.
- If you want to display only the .xml code (without a style sheet) select No Style Sheet from the System Menu Options.
- If the document opens without a Style Sheet applied (only the .xml code displays) you can select Style Sheet from the System Menu Options to display the document with its appropriate Style Sheet (determined by the Keyword Type values.)

Caution: If your Document Type is configured for Keyword-Based XML, its appearance is based on keywords. If you change a Keyword Value, you may alter the appearance of the document.

Viewing PDF Documents in Acrobat or Acrobat Reader

By default, PDF documents are displayed in the OnBase internal viewer. Using the internal viewer gives these documents access to full OnBase functionality (i.e., notes, cross-references, etc.).

However, in cases where full Acrobat or Acrobat Reader functionality is required, Acrobat or Acrobat Reader can be configured to display PDF documents within OnBase instead of the internal viewer.

Caution: Be advised that although full Acrobat or Acrobat Reader functionality will be available to these documents, OnBase functionality (i.e., the ability to add/modify Keyword Values, notes, cross-references, etc.) will not be available to PDF documents opened outside of the OnBase internal viewer.

To configure Acrobat or Acrobat Reader to display PDF documents within an instance of Acrobat or Acrobat Viewer instead of the internal viewer:

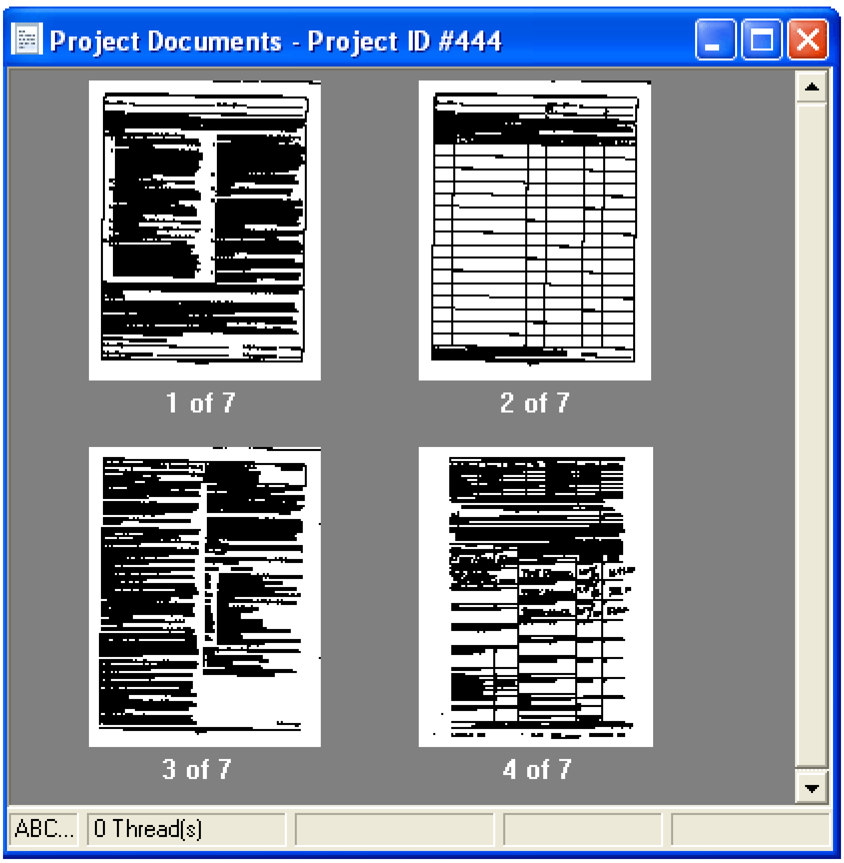
1. Open Adobe Acrobat or Adobe Acrobat Reader.
2. Click **Edit | Preferences** and select **Internet** from the Categories list.
3. In the Web Browser Options section, de-select the **Display PDF in browser** check box.
4. Click **OK** and exit Acrobat or Acrobat Reader.
5. Re-launch the OnBase Client module. PDF documents are now displayed in an instance of Acrobat or Acrobat Viewer instead of the internal viewer.

   Users will not have access to OnBase functionality (i.e. the ability to view/modify Keyword Values, Notes, Cross-References, etc.) from within Acrobat or Acrobat Reader.

Using the Thumbnail-Only Document Viewer

Depending on how your system was configured, some documents may be displayed in the thumbnail-only Document Viewer when you open them. The Document Viewer displays all the pages of an image document as thumbnails, making it easier to navigate and browse through the document.

Note: The Document Viewer does not display suppressed pages unless you manually navigate to them. For more information on suppressed pages, see your system administrator.



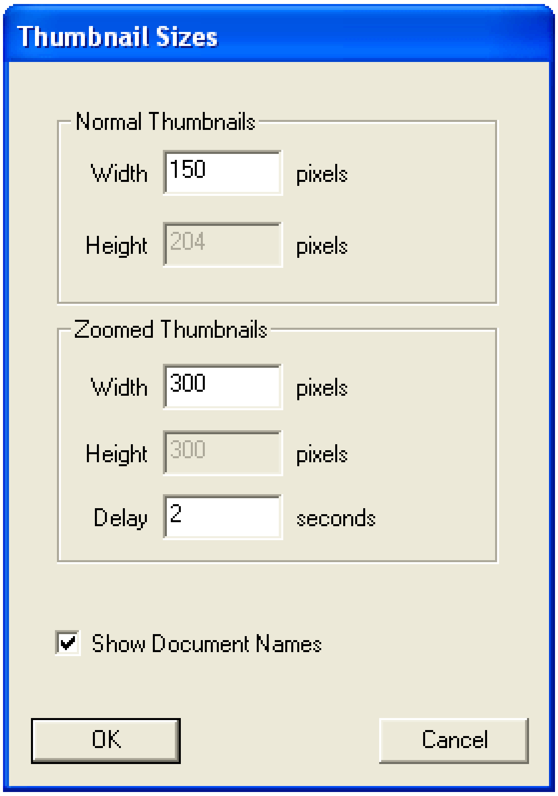
You can preview a thumbnail's content by hovering your cursor over it.

Double-click on a thumbnail to open the document to that page in the standard Document Viewer. The standard Document Viewer displays within the confines of the thumbnail-only Document Viewer.

The thumbnail-only Document Viewer offers limited functionality for working with documents. Open the document in the standard Document Viewer to access additional document options, such as modifying notes and annotations and accessing cross-references.

Modifying Thumbnail Options

1. From the Thumbnail Viewer, press **S**.
   The **Thumbnail Sizes** dialog box displays.



2. Set the desired **Width** and **Height** for the thumbnails.
   You can set both the **Normal Thumbnails** size (the default thumbnail view) and the **Zoomed Thumbnails** size.
3. In **Delay**, type the number of seconds you want to hover your cursor over a thumbnail before the zoomed thumbnail displays.
4. To display the document name below each thumbnail, ensure **Show Document Names** is selected.
   Deselect this setting if you do not want to display document names below each thumbnail.
5. Click **OK** to save your changes.

Viewing Text Documents

Text documents are documents composed of alphanumeric characters. You can display up to 513 characters per line.

Viewing Text Documents Containing Tab Characters

Text documents containing **Tab** characters may be correctly displayed in the Document Viewer, but other actions performed using these documents may lead to unexpected results.

For example, performing an internal or external text search on a text document containing **Tab** characters will return the correct search results, but the search strings may not be correctly identified in the document.

Tip: To ensure correct functionality for all text documents, remove all **Tab** characters from text documents before importing them into OnBase. **Tab** characters that are not removed are converted to spaces when imported into OnBase.

Navigating Text Documents

Open text documents can be navigated in the following ways:

Option	Description
Keyboard Arrow Keys	Use to scroll vertically or horizontally.
CTRL - Home	Use to scroll to the beginning of document.
CTRL - End	Use to scroll to the end of a document.
Scroll Bar Arrows	Click to scroll vertically or horizontally.
Scroll Bar Box	Click and drag the slider bars.
Tool Bar	Select the **Next Page** button or the **Previous Page** button from the toolbar. Alternately, press the **Page Down** and **Page Up** keys on the keyboard.
Document Menu	Select **Document | Next Page** or **Document | Previous Page**.
Go To Page	Right-click and select **Navigate | Go To Page**. Enter the page number to display.
Go To Line	Right-click and click **Navigate | Go To Line**. Enter the first line to display.

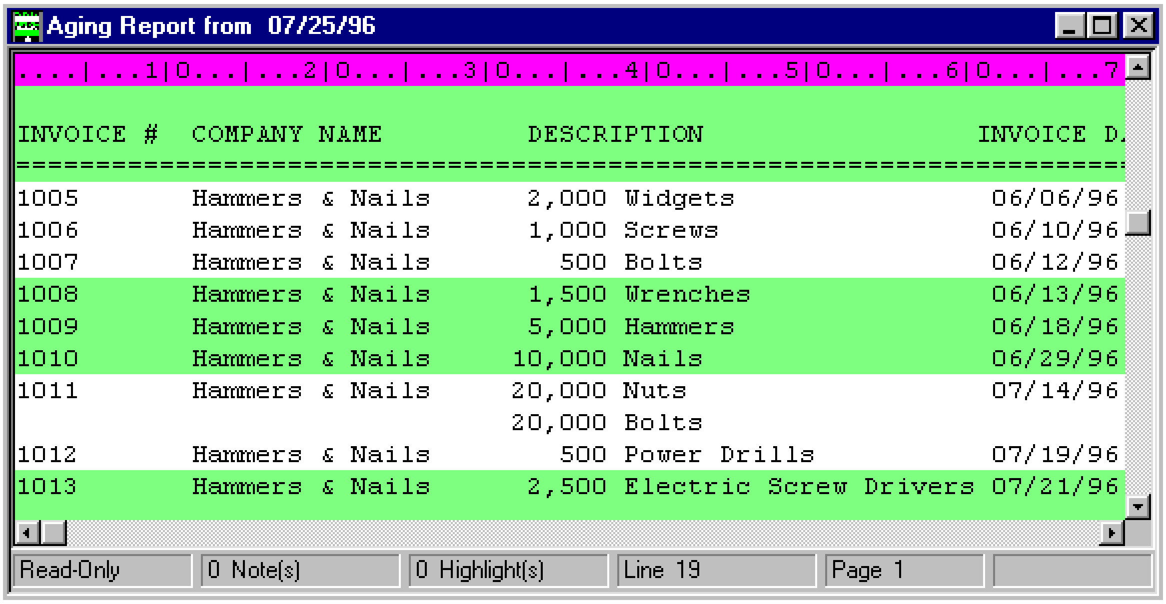
Applying a Ruler to Text Documents

Three types of rulers can be displayed at the top of text documents. Click **Ruler** from the right-click menu and select from the following:

- **Ruler 1** - Displays a hash mark every fifth column. Every tenth column's number is displayed on either side of its hash mark.
- **Ruler 2** - Displays a hash marks every fifth column. Every tenth column's number is displayed above its hash mark.

- **Ruler 3** - Displays the last two digits of every even-numbered column. For example, Column 104 only displays **04**. Numbers are displayed vertically.
- **Ruler Off** - Removes the ruler.

The following is an example of a text document with the **Ruler 1** option selected.



Disabling the Vertical Scroll Bar

The vertical scroll bar is displayed on the right side of the window. To remove the bar, select **Disable Vertical Scroll Bar** from the right-click menu. To re-enable the bar, click **Disable Vertical Scroll Bar** again.

Changing the Text Encoding of Documents

While viewing a text or HTML document, you can change the document's character encoding format. With additional privileges, you can also save the selected encoding format as the default encoding format for that document.

Note: You cannot save the encoding while viewing an E-Form document. To change encoding on E-Forms, open the appropriate E-Form template and follow the steps below. When changing the encoding of the E-Form template, all existing and future E-Forms referencing that template use the new encoding. For more information on E-Forms, see the E-Forms module reference guide or help file.

1. Right-click on an open text or HTML document and navigate to **Text Encoding**.
2. Select one of the available encoding formats.

   The document is refreshed to display in the selected format. To save this encoding format as the default for this document, right-click and navigate back to **Text Encoding**.

3. Click **Save Encoding**. The selected encoding format is saved as the default for this document.

Selecting Text in Documents

The system allows you to select a portion of a text document for a variety of purposes, such as printing, mailing as an attachment, saving to the clipboard or to a file, etc.

To select text, right-click on the open document, or the document status bar, and select **Select Method**, choose one of the following:

Note: Depending on your system configuration, the number of characters you can select horizontally may be limited. For more information on this behavior, see your system administrator.

Option	Description	Example
Line	Selects one or more horizontal lines of text.	John Doe Manager XYZ Solutions 28500 Clemens Road Westlake, OH 44145
Column	Selects one or more columns (vertical lines) of text.	John Doe Manager XYZ Solutions 28500 Clemens Road Westlake, OH 44145
Block	Selects an area of text between the first and last mouse clicks.	John Doe Manager XYZ Solutions 28500 Clemens Road Westlake, OH 44145

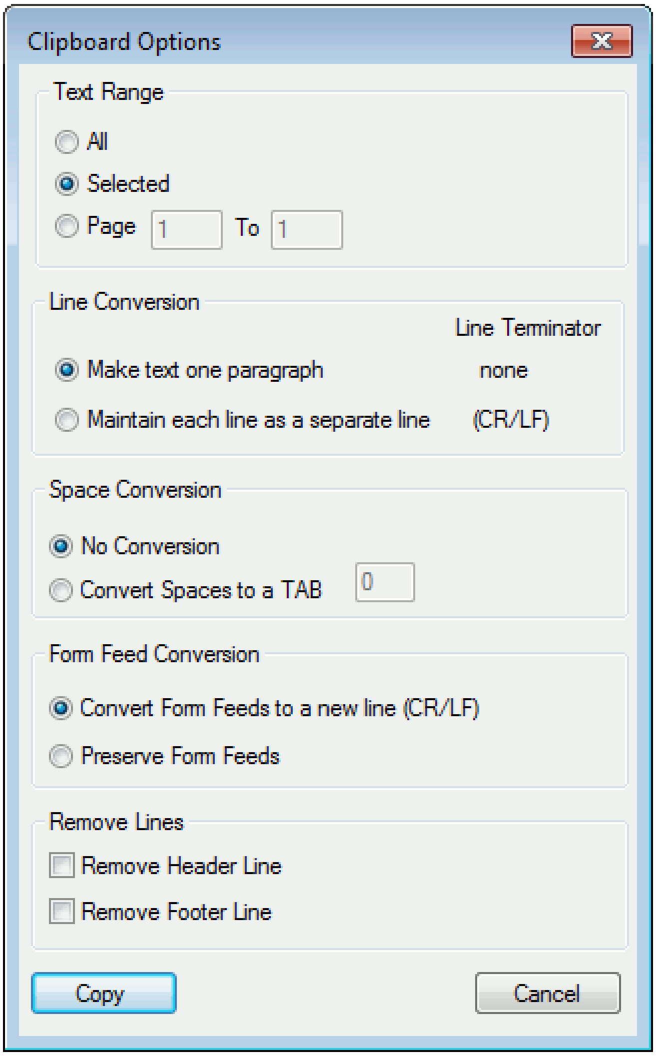
Left-click and drag the mouse to define the region of text. Release the mouse button when the text area is selected. The following options are displayed.

Option	Description
Print Selected	Opens the **Print** dialog box. After you click **Print**, the **Selection Printing Options** dialog box is displayed. Configure any necessary text document options. For more information on options in the **Print** dialog box, see the section on printing documents. Click **Print** to send the selection to the printer.
Copy to Clipboard	Displays the **Clipboard Options** dialog box, which allows you to copy text to the Windows clipboard. For more information on options in the **Clipboard Options** dialog box, see the following section.
Mail Selected as Attachment	Displays the **Mail Selection Options** dialog box, which allows you to attach the selected text to an email message. For more information on options in the **Mail Selection Options** dialog box, see the following section.
Cross-Reference	Searches for cross-referenced documents based on the selected text.
Text Lock	Displays selected columns or rows of text in a stationary position on the screen. The selected text remains stationary as you scroll through the document. The **Text Lock Lines** and **Columns** settings default to the bottom-most line or right-most column selected. Highlighting the text on the screen first provides a shortcut for filling in the **Text Lock Dialog**. To change the default settings, select either the **Lines** or **Columns** check box. Enter the number of lines from the top of the page to lock on the screen. Enter the number of columns from the left side of the page to lock on the screen. The locked text will always be the topmost lines or the leftmost columns currently in the display. **Text Lock** is also available from the right-click menu.
Create Highlight	Highlights the selected text. Alternately, use the Text Highlight option on the highlighter toolbar.

Option	Description
Save Selected As	Displays the **Save Selection Options** dialog box, which allows you to copy selected text to a file. For more information on options in the **Save Selection Options** dialog box, see the following section.

Specifying Text Selection Options

When left-clicking to select text in a text document and selecting **Copy to Clipboard**, **Mail Selected as Attachment**, or **Save Selected As**, a dialog box containing a set of options is displayed. The dialog box below is the **Clipboard Options** dialog box, which is displayed when selecting **Copy to Clipboard**.



The **Mail Selection Options** or **Save Selection Options** dialog box is displayed when you select **Mail Selected as Attachment** or **Save Selected As**, respectively. All of the dialog boxes contain the same options. When the dialog box is displayed, specify the following options:

Option	Description
Text Range	• Select **All** to save the entire document. • If you have selected text prior to selecting **File | Save As**, the **Selected** option is enabled. Select this option to save only the selected text. • Select a **Page** range to save only those pages.
Line Conversion	• Select **Make text one paragraph** to save the text as one paragraph. Extra spaces will be added in order to separate each line of text. **Note:** If you select this option, current text formatting will not be kept. • Select **Maintain each line as a separate line** to save the text with its current formatting.
Space Conversion	• Select **No Conversion** to save the text with all spaces intact. • Select **Convert spaces to a TAB** and enter a number to convert that number or more spaces to a tab upon saving (for example, if you enter a 2, when the system finds two or more space in the document, it will convert them to a tab).
Form Feed Conversion	• Select **Convert Form Feeds to a new line [CR/LF]** to convert form feed code to a line upon saving. • Select **Preserve Form Feeds** to keep form feed code intact upon saving.
Remove Lines	The **Remove Header Line** and **Remove Footer Line** items can be used to strip unwanted text from the top and bottom of each page saved. Select to **Remove the Header Line** or **Remove the Footer Line** or select both to remove both upon saving. The number of lines removed from the header and footer are determined by the **Report Header Line** and **Report Footer Line** values set for the Document Type on the **View / Print Options** dialog box.

From the **Clipboard Options** dialog box, click **Copy** to copy the text to the clipboard. The text can now be pasted outside of OnBase.

From the **Mail Selection Options** dialog box, click **Attach** to attach the text to a new email message. Enter the recipient email address, a subject, and message text. Send the message.

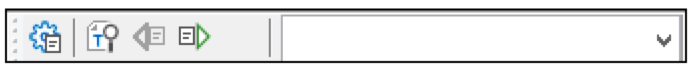
From the **Save Selection Options** dialog box, click **Save** to save the text to a new file. Select the directory and enter a file name for the file. From the Save as type drop-down list of the Windows **Save As** dialog box, you can save the file as a text file or PDF file. By selecting **All Files** from the drop-down list, you can specify another file extension (such as .doc) for the file.

Using the Text Search Toolbar

Use the Text Search Toolbar to search for specified text in an open text document.

Note: To activate and use this function, retrieve and open a text-based document.

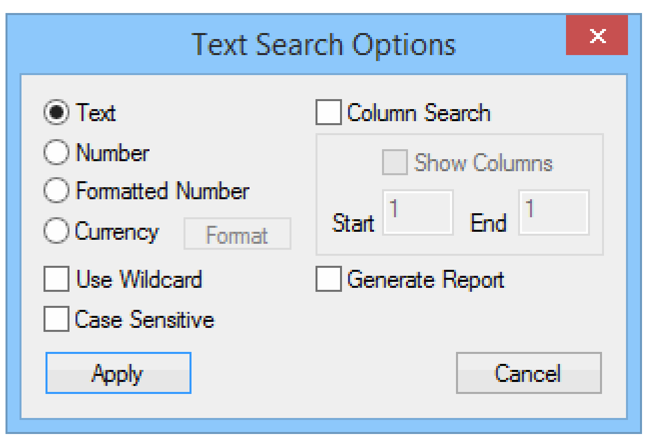
1. Type your search string in the **Text Search** toolbar text field and press **Enter**.



2. The text string that matches your entered search criteria in the **Text Field** will be highlighted in the open document.

Note: If your document contains one or more **Tab** characters or different types of **Space** characters (such as Ideographic Spaces), your search string may not be correctly highlighted in the document.

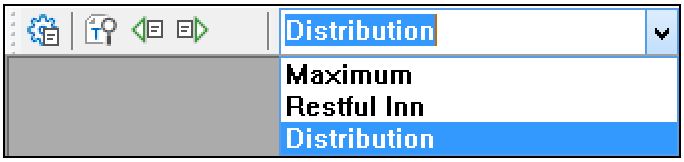
3. You can also define or limit your search options using the **Text Search Options** button.
4. The **Text Search Options** button displays the **Text Search Options** dialog box.



5. Click **Save** to exit the **Text Search Options** dialog box.

For definitions of all search options, see Text Search Options on page 304.

The system retains previously entered search information. View these initial search strings in the text field drop down.



This functionality allows you to perform identical searches on additional text documents. The system retains this search information until the program is closed or the search information is replaced with different search criteria. Even after you close your initially searched document, you do not have to re-enter the same search criteria to text-search additional documents.

Use the other Find buttons in the **Text Search Toolbar** to move up or down the open document and locate occurrences of your search criteria:

- **Find First**
- **Find Next**
- **Find Previous**

Using Custom Queries (Advanced)

Custom Queries

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

In the OnBase Client, Custom Queries can also allow you to retrieve folders from multiple Folder Types.

My Custom Queries

The **Custom Query** window lists all the available Custom Queries in your system. It provides two types of lists:

- **My Custom Queries**
- **All Custom Queries**

Configuring My Custom Queries

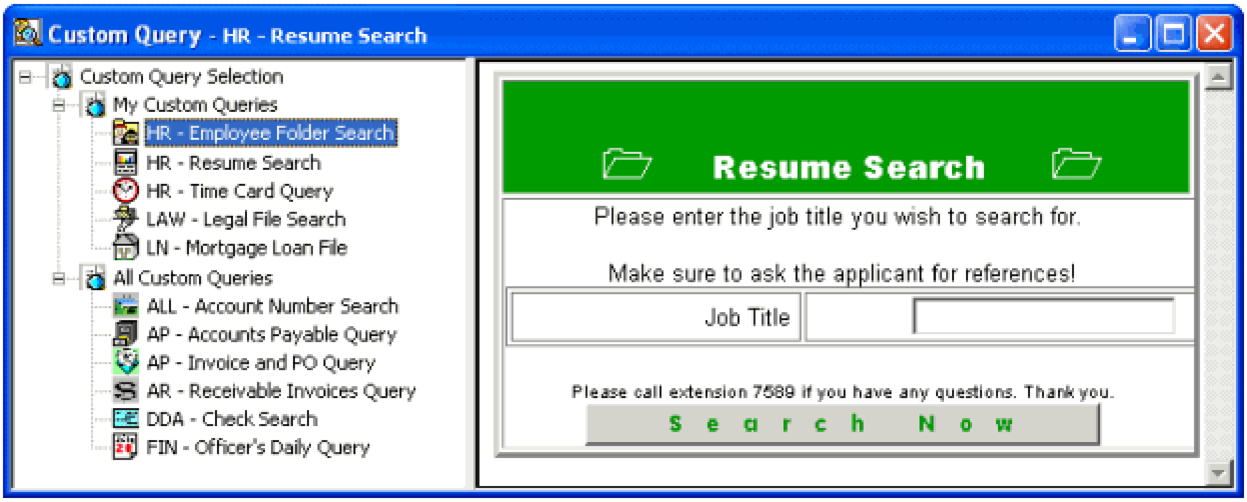
My Custom Queries allows you to customize your most commonly accessed Custom Queries from the **All Custom Queries** list. You may move any Custom Queries into the **My Custom Queries** list for easier access.

To configure My Custom Queries:

1. From the OnBase Client module, open your **Custom Query List** (**File | Open | Custom Query**). You can also click the **Open Custom Queries** toolbar button. If you have selected the **Open Custom Queries upon startup** option under **User | User Options**, your **Custom Query List** will be minimized at the bottom of the OnBase Client module desktop.

   See Modifying User Options: The Startup Tab on page 334 for more information on this option.

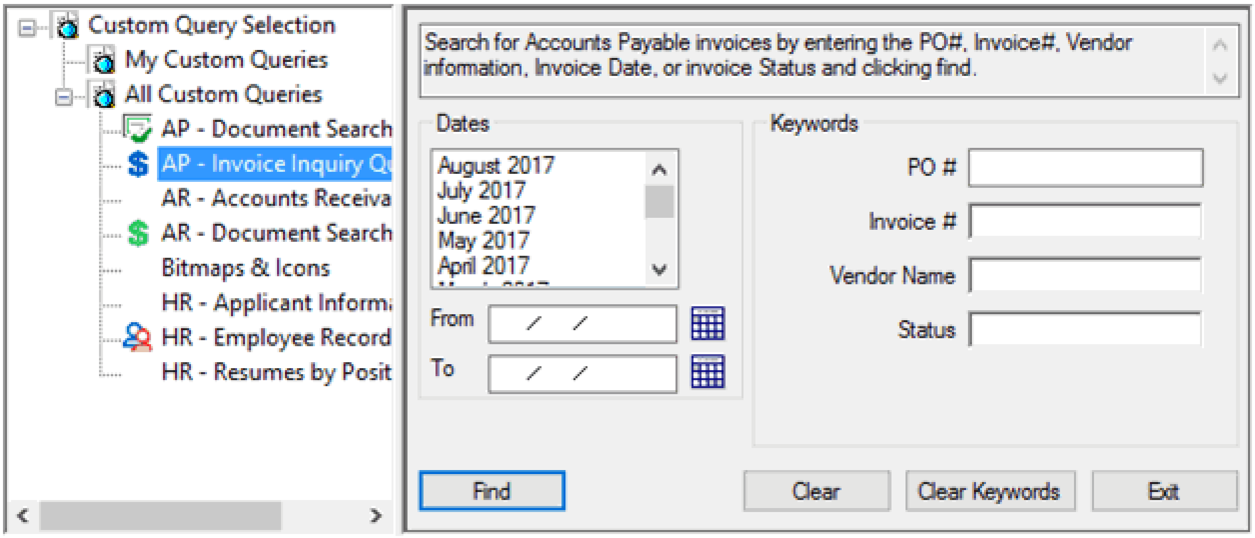
2. The **Custom Query** window displays two panes. The left pane displays two lists: **My Custom Queries** and **All Custom Queries**. The right pane displays the first custom query listed in the **My Custom Queries** list.



3. There are two ways to add a Custom Query to the **My Custom Queries** list:
   - Drag the query from the **All Custom Queries** list and drop it at the desired position in the **My Custom Queries** list.
   - Right-click on a query in the **All Custom Queries** list and select **Add to My Custom Queries**. The queries are added to the top of the **My Custom Queries** list, and can be dragged to any position in the list.
4. Repeat for all desired Custom Queries.

To Configure the Default Custom Query

The first query listed in the My Custom Queries becomes the Default Custom Query. If you do not have any Custom Queries in the **My Custom Queries** section, the first Custom Query in the **All Custom Queries** section will become the Default Custom Query.



Accessing and Using Custom Queries

SQL Custom Queries

When you open a SQL Custom Query, there is a button labeled **Show SQL**. Clicking on this button will display the SQL query string(s) used to create the custom query. The SQL string cannot be edited from this window, but it can be viewed.

Custom Query Results

The resulting documents may be open by default, or you may have to double-click on the documents to open them. This is determined by the **Document Search** setting on the **Document** tab of your **User Options**.

The total number of Custom Query results selected is displayed in the lower left corner of the **Custom Query Search Results** dialog box.

Folder Custom Query Results

When a Custom Query is used for folder retrieval, the results list displays all folders satisfying the search criteria. A folder may be listed multiple times if it has more than one value for a Keyword Type that is used as a display column.

The right-click options available for folder search results allow you to perform folder-related tasks, such as viewing folder Keyword Values or printing folder contents. To open a folder in the File Cabinets window, double-click it from the list. If a query returns only one folder, the File Cabinets window opens the folder automatically.

Note: If you are using the classic File Cabinets window, the File Cabinets window is opened, but the folder is not automatically displayed. To change this behavior, clear the **Classic File Cabinets Window** option in your **User Options**.

Display and Sort Columns

Depending on how your system is configured, the results list displays information about the documents returned in different columns, such as Document Name, Date Stored, and Document Type. Additional columns may be displayed for Folders and Notes.

If sorting is enabled, you can sort results in the results list based on the column headings. To sort the results by the data contained in a specific column, click the column heading that contains the data you want to sort the list by. To toggle the sort order of the results as ascending (e.g., A to Z, or 1 to 10) or descending (e.g., Z to A, or 10 to 1), click the column heading again.

Note: If you sort by the **Document Date** property, the results are sorted by both the date and time the document was imported into OnBase.

Re-Indexing Documents from Custom Query Search Results

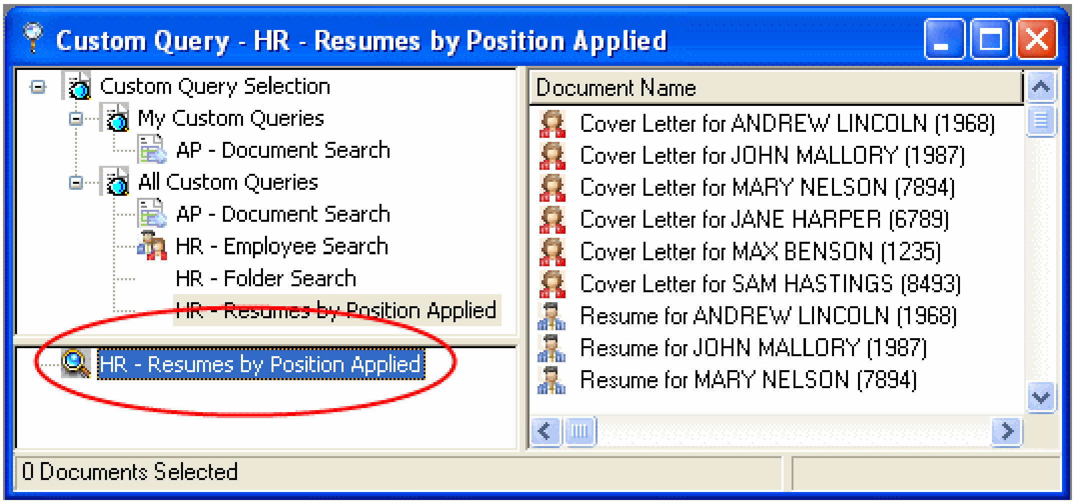
To re-index documents:

1. From the **Custom Query Search Results** list, select the documents you wish to re-index.
2. Select **File | Re-Index**.
3. The **Re-Index Document** dialog box displays. Re-index the information as necessary and select **Re-Index**.

Note: You must have the appropriate rights to re-index documents.

Custom Query History

After you have performed a Custom Query, all search results are saved in the Custom Query History list. This list will persist for the duration of the time you are logged onto the OnBase Client module.



Similarly to search results located in the Document Retrieval History list, you can right-click Custom Query search results to select the **Launch Viewer** option. The Viewer Window displays all the documents returned in a search and allows you to preview each item.

Note: All right-click menu options and Client Toolbar buttons are still available from the Viewer Window but only affect the document that displays in the Viewer Window and not in the search results list.

Adding Documents to OnBase

There are two main methods available to add new documents to your OnBase solution. You can import an existing document by using the **Import Document** dialog box. You can also create a new document in OnBase by opening an existing document stored in OnBase and saving specific pages of that document as a new document.

Importing a Document

The following limitations apply when importing documents:

- Depending on your system's configuration, the file size of documents that can be imported may be limited.

Note: Unless otherwise noted, OnBase does not support the import of files larger than 2 GB.

- DJDE documents must be imported using the DJDE Processor. For more information, see the DJDE Input Filter module reference guide.
- As .dotm and .dotx files are Microsoft Word Templates, modified versions are automatically saved to OnBase as new documents. If this is not the intended behavior, the files should be saved as .docx or .doc files before importing them into OnBase.

To import a document into OnBase, follow these steps:

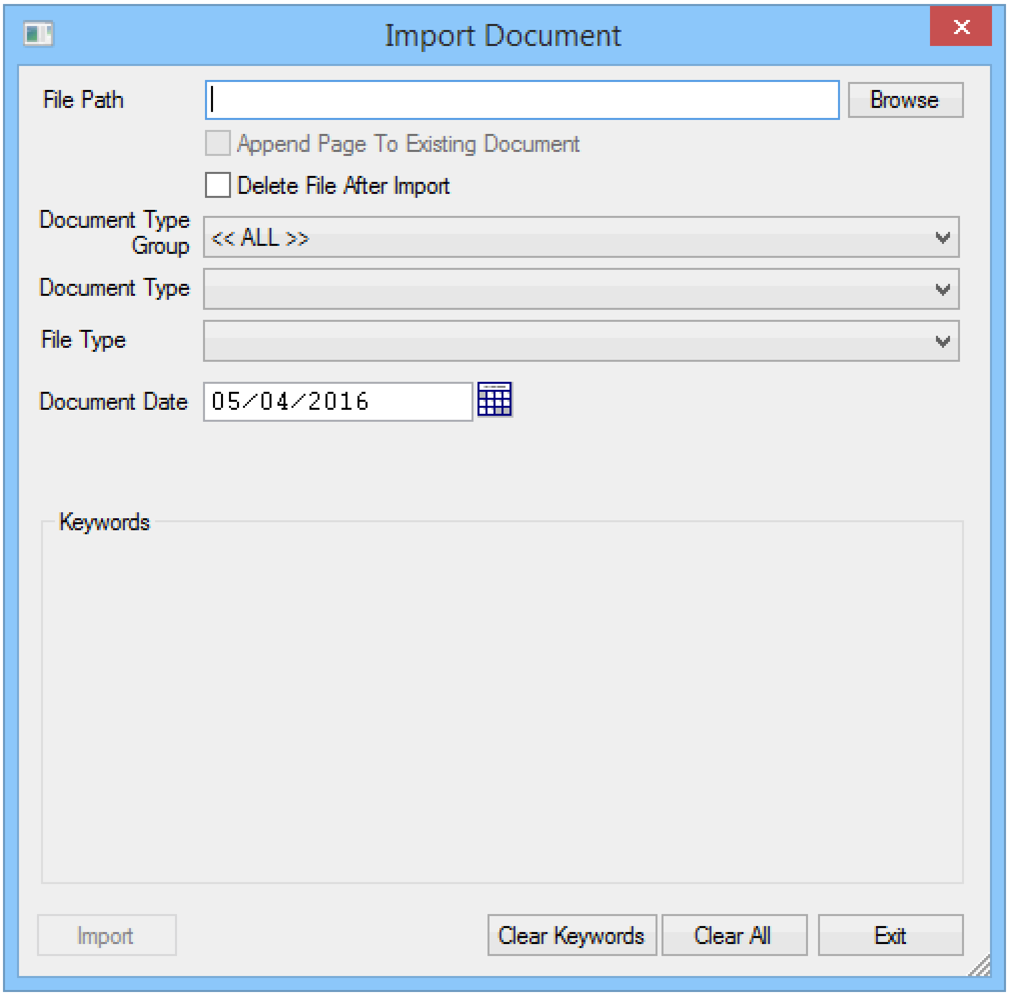
1. Open the **Import Document** dialog box by performing one of the following actions:
   - Select **File | Import**.
   - Click the **Import Documents** toolbar button.

- Drag the document onto the OnBase Client desktop.

Note: You cannot import a document by dragging it from Windows Explorer into OnBase if you run the OnBase Client as administrator in a UAC environment. This behavior is intentional per Microsoft UAC guidelines.

- Select **Archive Documents using OnBase Client** from the Windows Autoplay dialog box.

Note: Not all Windows Autoplay events offer the **Archive Documents using OnBase Client** option. For more information on adding the option to a specific Autoplay event, contact your solution provider.



2. Specify or **Browse** to the file to be imported in the **File Path** field. You may enter up to 259 characters in the **File Path** field.

Note: For information about the **Append Page To Existing Document** check box and the **Delete File After Import** check box, see Importing Documents - Advanced Options on page 96.

3. Select the appropriate **Document Type Group** for your document.
4. Select the appropriate **Document Type** for your document. If there is only one Document Type available, it is automatically selected.

Note: If you select a different Document Type during import, entered Keyword Values are cleared. Default values for common Keyword Types are either updated or cleared when selecting a different Document Type, depending on whether the selected Document Type has default values for those Keyword Types.

5. Select the appropriate **File Type** for your document.

Note: Depending on your system's configuration, the **File Type** may be automatically selected, or only certain File Types may be available.

Caution: Contact your system administrator before selecting the **Image Rendered PDF** file format, as selecting this file format without the proper system specifications can cause unexpected behavior.

6. Enter the **Document Date.**
7. Enter Keyword Values in the available Keyword Type fields.
8. Click **Import**.

Note: For more advanced information on importing documents, see Importing Documents - Advanced Options on page 96.

Importing and Indexing Documents (Advanced)

Importing Documents - Advanced Options

Depending on your system's configuration, you may be able to select the following options when importing documents:

Option	Description
Append Page to Existing Document	Select this option if you are importing an image file and wish to append this file to an existing document in the same Document Type with the same File Type and Keyword Values.

Option	Description
Import All Files as Single Document	When this option is selected, all image documents being imported will be saved to OnBase as a single document. **Note:** This option is only displayed when importing multiple image documents.
Delete File After Import	Select this option to delete the document from its original location after it is imported into OnBase. **Caution:** Before selecting this option, be sure the document is not needed by other users or processes. **Note:** When using Windows Autoplay to import a document into OnBase, the option to delete the file from its original location is displayed after the file has been imported.
Initiate Workflow	Select this option to add the imported document to a Workflow queue. For more information on this option, see the Workflow documentation.
Queue Document for Full-Page OCR	Select this option to add the imported document to an OCR queue. For more information on this option, see the Full-Page OCR documentation.
Queue Document for Advanced Capture	Select this option to add the imported document to an Advanced Capture queue. For more information on this option, see the Advanced Capture documentation.
Split	Click this button to open the **Document Separation** window, where the document can be separated into multiple documents. **Note:** This button is only displayed when importing image documents.
Clear All	Click this button to clear all search criteria entered in the **Document Retrieval** window.
Clear Keywords	Click this button to clear all Keyword Values entered in the **Document Retrieval** window.

Indexing Mixed Case Keyword Values

When indexing or re-indexing a document, two Keyword Values with the same value but a different case may not be stored on the same document.

For example, the values “JOHN ADAMS” and “John Adams” cannot be indexed under the same Keyword Type on the same document.

Re-Indexing Documents

Each document stored in OnBase has an associated Document Type, Document Date, and optional Keyword Types. This information is usually entered when a document is first imported into OnBase upon indexing.

You can change this associated information using the **Re-Index** feature.

Note: Ensure you understand the effects of re-indexing documents before proceeding. For more information, see Considerations for Re-Indexing Documents and Adding or Modifying Keyword Values on page 109.

To re-index a document:

1. Save any changes that you have made to a document before re-indexing.
2. From an open document or from a selected document in a Document Search Results list, open the **Re-Index Document** dialog box by one of the following methods:
    - Right-click and select **Re-Index**
    - Select the **Re-Index** toolbar button
    - Select **File | Re-Index**
    - Press **Alt + F** and then **D**

Note: If you open a document in the Viewer and re-index, and then right-click the same document from the Document Search Results list, a lock is applied and you are unable to re-index the document from the Document Search Results list.

Note: If the original Document Type contains a Multi-Instance Keyword Type Group, the Document Type to which you want to re-index must contain the same Multi-Instance Keyword Type Group.

Note: The Document Type of Unity Form file type documents and Image Form file type documents cannot be changed during re-indexing.

3. Select a Document Type from the **Document Type** drop-down list. All Document Types that you have rights to create are displayed.

   To filter this list, you can first select a Document Type Group from the **Document Type Group** drop-down list.

   If the destination Document Type is configured to use Default Keyword Values, these Keyword Values are assigned to the document when the destination Document Type is selected from the **Document Type** drop-down list.

Note: If you select a different Document Type at any point during the re-indexing process, Keyword Values for common Keyword Types are retained. For example, if there is a value for the **City** Keyword Type, and you switch to a different Document Type that also contains the **City** Keyword Type, the original **City** Keyword Value is retained. This also applies to Keyword Types configured to use Default Keyword Values on the initial Document Type. These values are not replaced, even if the new Document Type uses a different set of Default Keyword Values.

Caution: If you are re-indexing a document associated with a Keyword Type Group (KTG) or Multi-Instance Keyword Type Group (MIKTG) filled by an AutoFill Keyword Set to another Document Type associated with the same KTG or MIKTG filled by an AutoFill Keyword Set, the AutoFill Keyword Set may unexpectedly re-populate secondary Keyword Values once the Document Type is changed.
For more information, see Considerations for Re-Indexing Documents and Adding or Modifying Keyword Values on page 109.

4. Change the **File Type**, if needed.
   - Select another file format available from the **File Type** drop-down list.
   - You can easily change the file format by re-indexing the document instead of re-scanning or re-importing it to OnBase with the corrected file format.
   - File formats available for Re-Indexing depend on your system setup and the file format itself (certain file formats are only available through document processes or system functions.)

Caution: Contact your system administrator before selecting the **Image Rendered PDF** file format, as selecting this file format without the proper system specifications can cause unexpected behavior.

5. Change the **Document Date**, if needed. If a document date is not specified when the document is processed into OnBase, the **Document Date** is the same as the **Date Stored**.

   Click the **Calendar** icon next to the **Document Date** to select a date.
6. Depending on your system configuration, the **Initiate Workflow** check box may be displayed.

   If this check box is selected, a Workflow event is triggered if the creation of a document of this Document Type is configured to trigger a Workflow process. If this check box is not selected, a Workflow process is not triggered even if the creation of a document of this Document Type is configured to trigger a Workflow event.

7. Change Keyword Values as desired. You can use the **Tab** key to move to the next Keyword Value field. Note the following:
   - Some Keyword Types may be configured to be uppercase only, while others may be configured to appear in mixed or lowercase.
   - Depending on your system's configuration, certain Keyword Types may appear as read-only in the **Re-Index Document** dialog box to certain users. These Keyword Types may also be masked.
   - OnBase will not retain two sets of duplicate Keyword Values. For example, a Document Type contains two instances of the Keyword Type **First Name**, and one value is John and the other value is Sarah. If you change the value of Sarah to John, upon clicking **Re-Index**, OnBase will only retain one instance of John. If two Multi-Instance Keyword Type Groups share identical values, only one of those Multi-Instance Keyword Type Groups is retained.

Caution: After changing Keyword Values, click on any field in the dialog box before you click the Index button. This will trigger any AutoFill Keyword Sets that may have been affected by the Keyword Value change. See your system administrator for information regarding your system's AutoFill Keyword Set configuration. Click **Exit** to cancel changes if you get undesired results.

8. To add a new Keyword Type field of the same Keyword Type to the document, place the mouse cursor inside the Keyword Type field that you want to duplicate and press **F6**. This adds a new Keyword Type field. Enter the new Keyword Value.

   If the Keyword Type that you double-click belongs to a Keyword Type group, then it can only be duplicated if the group is a Multi-Instance Keyword Type Group. The entire group is duplicated, not just the selected Keyword Type.
9. Press **Clear Keywords** if you want to clear all existing Keyword Values and re-enter new values.
10. If you are re-indexing an image file, the **Split** button is displayed. Click it to open the **Document Separation** window, where the document can be edited and separated into multiple documents.
11. Click **Re-Index** or press **ALT+I** to save your changes and re-index the document. Click **Cancel** to cancel changes.

Note: Review changes carefully before saving. Once re-indexed, documents can be retrieved using only the new Keyword Values.

Note: You can also change Keyword Values by right-clicking the document, selecting **Keywords**, and entering new Keyword Values in the appropriate fields. Re-indexing allows you to change the Document Type in addition to Keyword Values.

Keywords with Drop-Down Lists

Some Keyword Type fields have drop-down lists from which you can select Keyword Values. Select a Keyword Value from a drop-down list using any of the following methods:

- Click the drop-down button and scroll to the value you want to select.
- Place the cursor in the Keyword Type fields with the drop-down and press **F5** or the drop-down button to display available Keyword Values. Select a Keyword Value. You can use the up and down arrow keys to select from the Keyword Values displayed in the drop-down list. When you have selected the appropriate Keyword Value, press **Enter**.
- Filter values available from the drop-down list by entering a word and/or character(s) that are part of the Keyword Value. When you press **F5** or the drop-down button, the list displays only values that match the entered characters. Scroll to your selection.
- Place the cursor in the Keyword Type field with the drop-down and press **Alt** and then the **down arrow** on your keyboard. Scroll to select a Keyword Value.

Note: The **F5** function is only available for Keyword Types that are configured to use a drop-down menu.

If two or more consecutive Keyword Types contain drop-down lists and are ordered in such a way as to show a hierarchical parent/child relationship, the Keyword Types may be part of a Cascading Data Set. Selecting a Keyword Value from the parent drop-down list filters the available Keyword Values from the subsequent child drop-down list.

Re-Indexing Document Revisions

You can re-index a document revision that is not the latest revision. For example, if a document has three revisions with the third being the most recent, you can re-index the first revision.

The revision process is the same as Re-Indexing Documents on page 98, only you would access documents from the Document Results Search List using the Revisions/Rendition option from the right-click menu. When the **Revisions/Renditions** dialog box is displayed, select the oldest revision and re-index as needed. You all the options available to you during a regular re-indexing, including the ability to change the file type.

Using AutoFill Keyword Sets When Indexing or Re-Indexing

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

Indexing with AutoFill Keyword Sets

1. From the **Import Document** dialog box, enter the first Keyword Value and press the **Tab** key on the keyboard. The remaining values for the remaining Keyword Types in the AutoFill Keyword Set will populate in their respective fields. If you entered a Primary Keyword Value that has more than one AutoFill Keyword Set associated with it, the **Select Keyword Set** dialog box is displayed. Continue to Step 2. Otherwise, skip to Step 6.
2. If you are prompted to select which AutoFill Keyword Set to use, the Primary Keyword Value has more than one AutoFill Keyword Set associated with it. For example, both the Plaintiff and the Defendant may share the same Case#, so there may be two separate sets of values for a Case# Primary Keyword Value.
   - Depending on how your system is configured, you may be allowed to choose one or more of the AutoFill Keyword Sets.
   - If you are permitted to select only one set, the values of your selected set are displayed in the indexing fields.
   - If you are permitted to select multiple AutoFill Keyword Sets, the document is indexed with values from both AutoFill Keyword Sets.
3. Select the AutoFill Keyword Set(s) from the list and click **OK**.
4. Keyword Values are displayed according to the order in which their associated Keyword Types are configured to display on the Document Type. Depending on the AutoFill Keyword Set's configuration, these values may be read-only.

   For example, if a loan document associated with a loan taken out jointly by two customers is associated with one Keyword Value for **Account #**, **Last Name**, and **Address**, but two different Keyword Values for **First Name**, then an additional instance of the **First Name** Keyword Type is added after the first and both Keyword Values for **First Name** are displayed. Only one instance of a Keyword Value common to both sets is displayed.
5. You can verify if the Keyword Set Configuration permits multiple sets by checking the **Settings**. In the Configuration Module, select **Keyword | AutoFill Keyword Sets**, select the AutoFill Keyword Set you want to verify and click **Settings**.

Note: Your User Group must have rights to that AutoFill Keyword Set to have access to it in the **AutoFill Keyword Sets Configuration** dialog box.

The **Allow Multiple Keyword Set Selection** will be checked if the AutoFill Keyword Set is configured to allow for more than one set of AutoFill Keyword set values for one Primary Keyword Value. This setting can be changed once the AutoFill Keyword Set has been created.

6. When all fields are populated, click **Import** to finish or display the **Import Document** dialog box for the next document.

Note: If you change the Primary Keyword Value and press **Tab**, all Secondary Keyword Values are updated to reflect the new Primary Keyword Value. If you create another Primary Keyword Type field and enter a second Primary Keyword Value, OnBase adds another set of values associated with the second Primary Keyword Value while retaining the values associated with the first Primary Keyword Value.

Note: Every workstation that will be accessing External AutoFill Keyword Sets must have an ODBC connection that has the same name as the one configured in the Configuration module. See your system administrator for details. In the case of Web Server, only the Web Server itself must have the ODBC connection, not the client workstations.

Re-Indexing with AutoFill Keyword Sets

1. While a document is open in the Document Viewer or selected in the Document Search Results list, click **File | Re-Index**. The **Re-Index Document** dialog box is displayed.
2. Using the drop-downs, select the **Document Type Group**, **Document Type** and **File Type** to which the document is to be re-indexed.

Caution: AutoFill Keyword Sets may unexpectedly re-populate Secondary Keyword Values when re-indexing to a Document Type associated with the same Keyword Type Group (KTG) or Multi-Instance Keyword Type Group (MIKTG) as the current Document Type. For more information, see Considerations for Re-Indexing Documents and Adding or Modifying Keyword Values on page 109.

3. Select the **Document Date** using the Calendar or by entering a date in the field.

4. If necessary, modify the Keyword Values on the document:

   Changing the Primary Keyword Value to another Primary associated with the AutoFill Keyword Set: If this occurs, all Secondary Keyword Values are updated to reflect the values associated with the new Primary Keyword Value.

   To avoid undesired Keyword Value changes, click on any field in the dialog box before clicking the **Re-Index** button. This will trigger the AutoFill Keyword Set and allows the user to review any changes made to the Secondary Keyword Values before re-indexing the document.

   If more than one AutoFill Keyword Set is associated with the same Primary Keyword Value: Multiple AutoFill Keyword Sets are displayed in a selection box after the Primary Keyword Value is entered. Depending on how your system is configured, you may be able to select one AutoFill Keyword Set or you may be able to select multiple AutoFill Keyword Sets.

   If you are only permitted to select one AutoFill Keyword Set, the Keyword Values associated with the AutoFill Keyword Set populate the Keyword Type fields.

   If you are permitted to select more than one AutoFill Keyword Set, the document is indexed with Keyword Values from all AutoFill Keyword Sets. Only one instance of a Keyword Value common to both sets is displayed. Additional instances of Keyword Types are added to hold Keyword Values not common to both AutoFill Keyword Sets.
5. Add Keyword Values to any Keyword Types that are not associated with the previous Document Type but are associated with the new Document Type.
6. Click **Re-Index**.

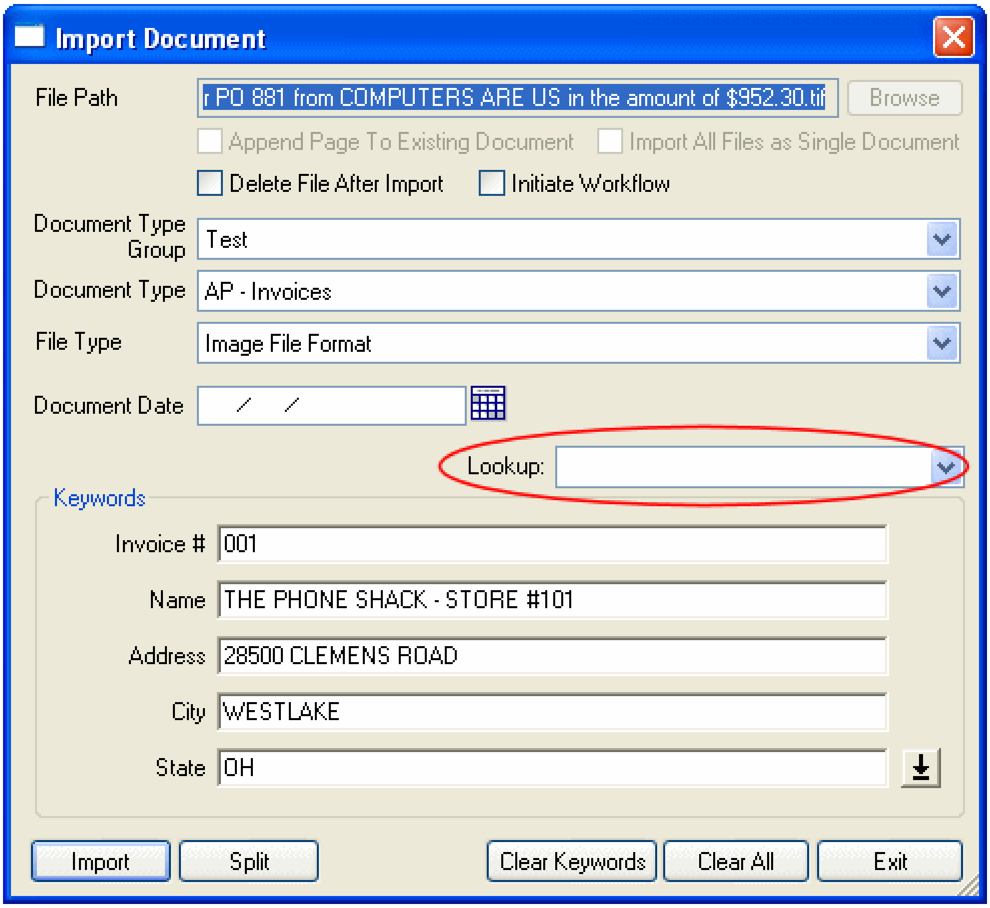
   Once the document has been re-indexed, it no longer exists in the database as the original document, and can only be retrieved using the new Document Type and any new Keyword Values.

Using a Reverse AutoFill Keyword Set Lookup

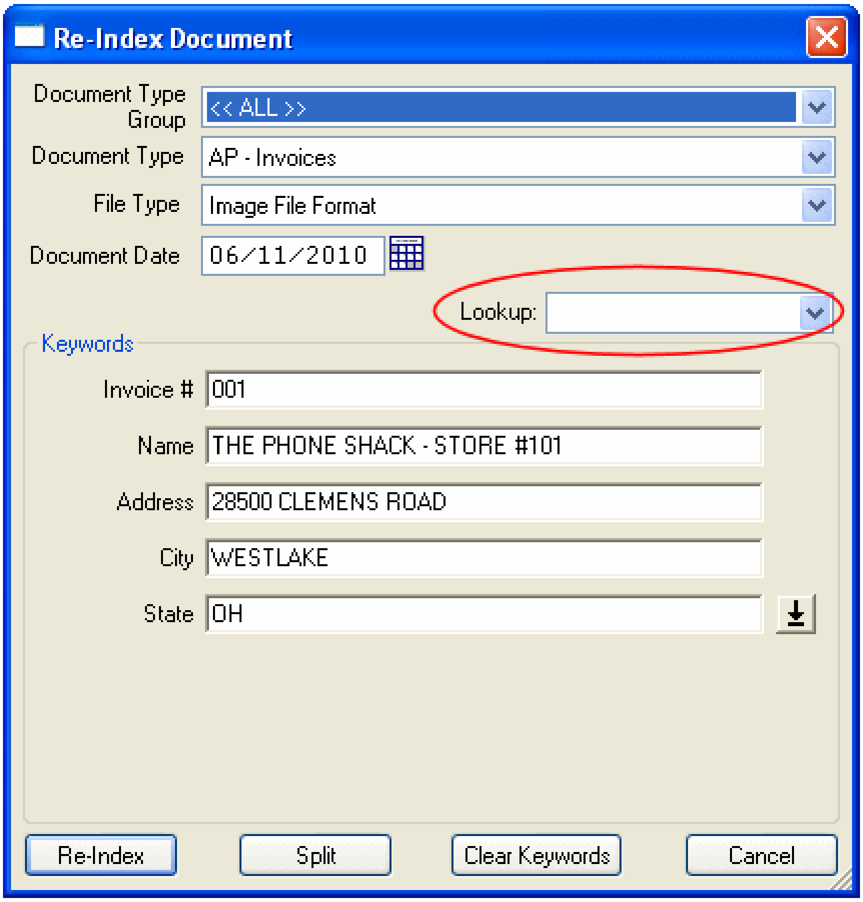
To use a Reverse AutoFill Keyword Set Lookup to find an AutoFill Keyword Set:

1. From the **Import Document** dialog box, use the **Lookup** drop-down select list to select the Reverse AutoFill Keyword Set Lookup you want to use to select an AutoFill Keyword Set.

Note: The lookup drop-down list is displayed if a Reverse AutoFill Keyword Set is configured for the selected Document Type or any of the document's Keyword Types.



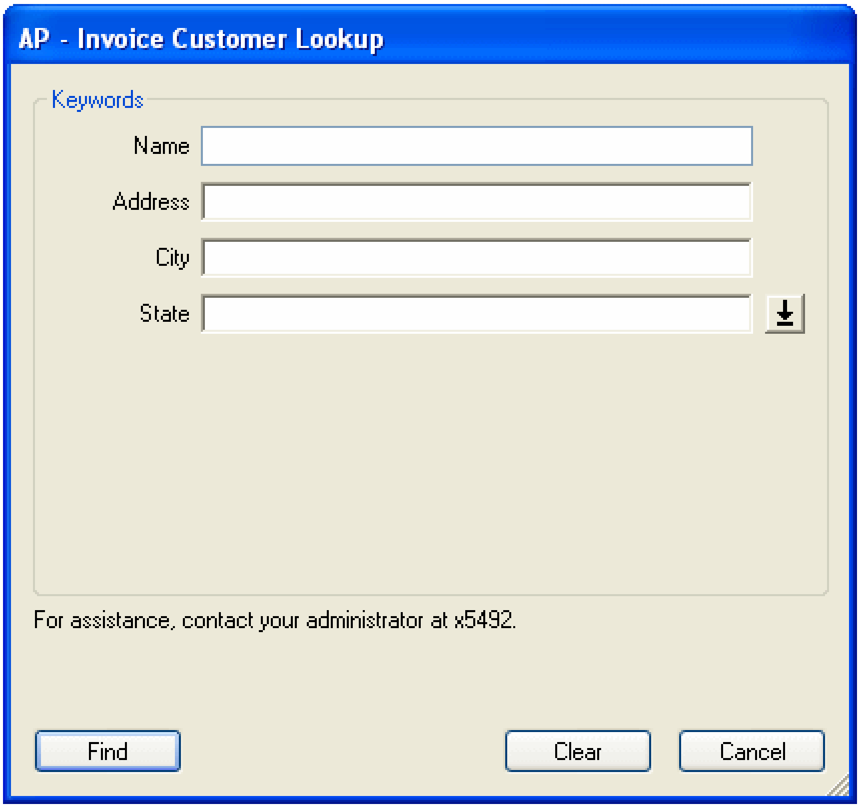
The lookup drop-down list is also available when re-indexing a document from the **Re-Index Document** dialog box.



Note: If multiple AutoFill Keyword Sets are assigned to the Document Type, more than one Reverse AutoFill Keyword Set Lookup may be available in the lookup drop-down list.

2. Once a Reverse AutoFill Keyword Set Lookup has been selected from the lookup drop-down list, the **Search** dialog box is displayed.

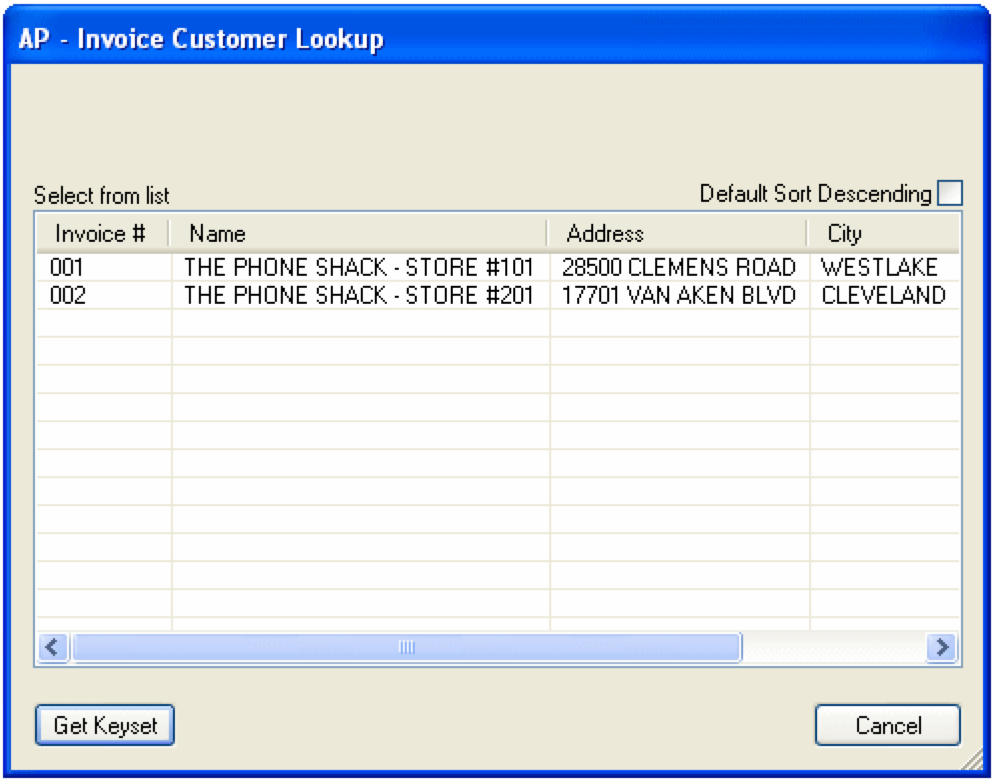
Note: For example purposes, this documentation refers to the **Search** dialog box, but the actual title of the dialog box is configurable and is set by your OnBase administrator.



3. In the **Search** dialog box, one or more of the AutoFill Keyword Set's Secondary Keyword Types are displayed. Enter any known Keyword Values and click **Find**.

Note: Reverse AutoFill Keyword Set Lookups work correctly with encrypted Keyword Types as long as the entire secondary value is searched.

AutoFill Keyword Sets that match the search criteria are displayed.

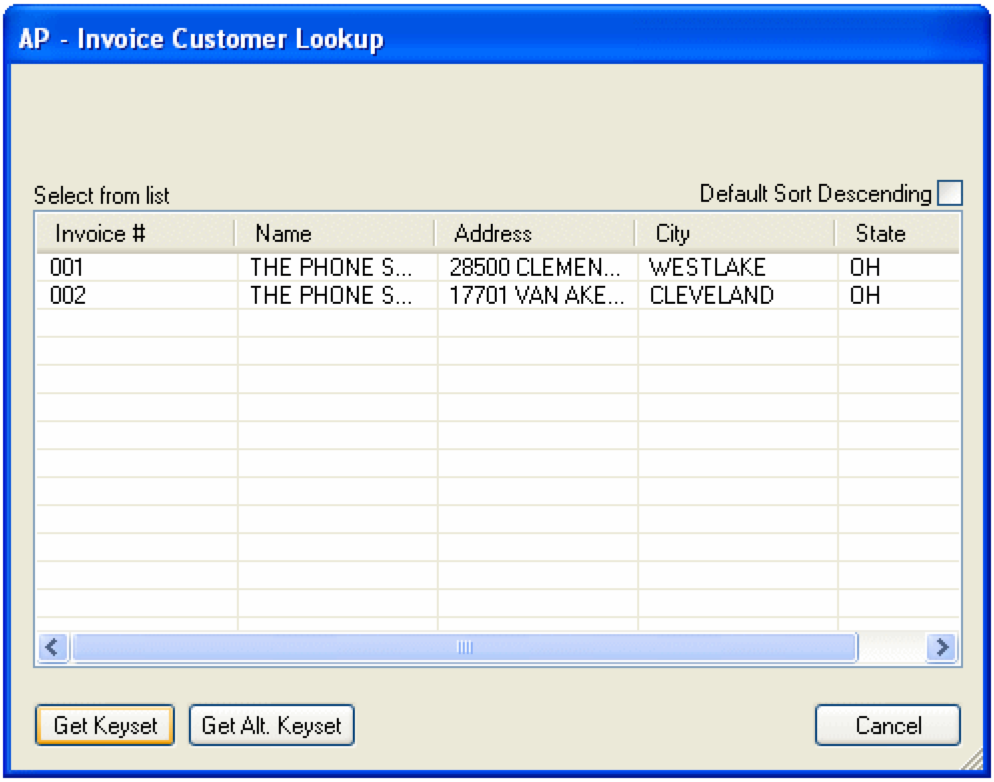


4. Depending on the configuration of the Reverse AutoFill Keyword Set Lookup, you may be able to search, filter, or sort the results to assist you in finding the correct AutoFill Keyword Set.
5. Once you have identified the correct AutoFill Keyword Set, double-click the selected AutoFill Keyword Set or select it and click the **Get Keyset** button.

Note: For example purposes, this documentation refers to the **Get Keyset** button, but the actual name of the button is configurable and is set by your OnBase administrator.

The **Results** dialog box is closed and the **Import Document** or **Re-Index Document** dialog box is displayed with the Keyword Values from the selected AutoFill Keyword Set displayed.

6. Depending on your Reverse AutoFill Keyword Set Lookup configuration, a **Get Alt. Keyset** button may also be displayed that will expand the AutoFill Keyword Set in a different manner. For more information on this option, contact your OnBase administrator.



Note: For example purposes, this documentation refers to the **Get Alt. Keyset** button, but the actual name of the button is configurable and is set by your OnBase administrator.

Considerations for Re-Indexing Documents and Adding or Modifying Keyword Values

Ensure you understand the effects of re-indexing documents and adding or modifying Keyword Values before proceeding with either task. Documents are re-indexed in the **Re-Index Document** dialog box. Keyword Values are added or modified in the **Add/Modify Keywords** dialog box.

Note: You cannot re-index a document or add or modify Keyword Values if the document has been locked by another user. See your system administrator for information regarding Document Lock Administration.

- **Automatically Change Secondary Keyword Values of an AutoFill Keyword Set**
  If an AutoFill Keyword Set is associated with the Document Type and you modify the Primary Keyword Value, all Secondary Keyword Values are automatically updated to reflect Keyword Values in the AutoFill Keyword Set when clicking **Re-Index**.

Note: You cannot re-index documents in the **Add/Modify Keywords** dialog box.

- **Keyword Values in Multi-Instance Keyword Type Groups**
  If the original Document Type contains a Multi-Instance Keyword Type Group, the Document Type to which you want to re-index must contain the same Multi-Instance Keyword Type Group in order to preserve the integrity of the data relationship.
- Re-indexing from a standard Keyword Type that has multiple Keyword Type Values to a Multi-Instance Keyword Type Group is not supported. It is not supported because it is not known which instance of the Multi-Instance Keyword Type Group to associate with each Keyword Type Value. If you must re-index from standard Keyword Types to a Multi-Instance Keyword Type Group, you must manually enter all of the Keyword Type Values appropriately in the Multi-Instance Keyword Type Group instances.
- **AutoFilled Keyword Values in Keyword Type Groups or Multi-Instance Keyword Type Groups**
  Re-indexing a document to another Document Type associated with the same Keyword Type Groups or Multi-Instance Keyword Type Groups causes any associated AutoFill Keyword Sets to re-populate the Keyword Values in the Keyword Type Group or Multi-Instance Keyword Group.
  If Secondary Keyword Type Values contained in a Keyword Type Group or Multi-Instance Keyword Type Group initially populated by an AutoFill Keyword Set are changed at any time before the new Document Type is selected, some or all of the modified Keyword Values are overwritten if an AutoFill Keyword Set is configured to populate any of those values in the Keyword Type Group or Multi-Instance Keyword Type Group on the new Document Type. The overwritten Keyword Values become permanent once re-indexing is complete.
  If the user closes the **Re-Index Document** dialog box before clicking the **Re-Index** button, or if the Secondary Keyword Values are changed in the **Re-Index Document** dialog box after the new Document Type is selected, the user is prompted to save.

Note: Changing the Primary Keyword Type Value prior to changing the Document Type will prevent the AutoFill Keyword Set from re-populating Secondary Keyword Type Values after a new Document Type is chosen, because the AutoFill Keyword Set is not triggered by the modified Primary Keyword Value, unless the modified Primary Keyword Value is also a Primary Keyword Value in an AutoFill Keyword Set associated with the new Document Type. Then, the modified Primary Keyword Value would cause the existing Secondary Keyword Values to be replaced by the associated Secondary Keyword Values.

Note: This only affects Keyword Type Groups or Multi-Instance Keyword Type Groups. Individual AutoFilled Keyword Types will retain any modified, individual, AutoFilled Keyword Values when a document is re-indexed, even if values from Keyword Type Groups or Multi-Instance Keyword Type Groups are overwritten on the same document.

- **Require Changes to Child Values in a Cascading Data Set**

  A Cascading Data Set is an indexing feature that defines parent/child relationships between drop-down Keyword Values available on a document or folder. Changing a parent Keyword Value in a Cascading Data Set will not update the child Keyword Values that depend on it. For example, suppose a document is indexed with a selected State and County, where the County Keyword Value is a child to the selected State Keyword Value. If you change the State Keyword Value, then the County will retain its original value and will not be updated to reflect the new State.
- **Trigger Auto-Foldering**

  If you re-index a document that is configured for auto-foldering, it will trigger an auto-foldering process.
- **Alter the contents of Dynamic folders**

  Because Dynamic Folders contain documents according to their Keyword Value, re-indexing a document or adding or modifying Keyword Values may dynamically move the document from its current folder to another folder.
- **Affect the appearance of your document**

  The appearance of an XML file format document may change if you add or modify the Keyword Values or re-index the document. Your system administrator determines whether the document’s appearance is dependent on Keyword Values.
- **Affect Workflow**

  Keyword Values can affect Load Balancing and certain Workflow actions, such as **Set Related Document’s Keyword Equal to This Document’s Keyword**. See the **Workflow** module reference guide or help files for details.

Note: Re-indexing a document or adding or modifying Keyword Values may trigger different results depending upon the Workflow action.

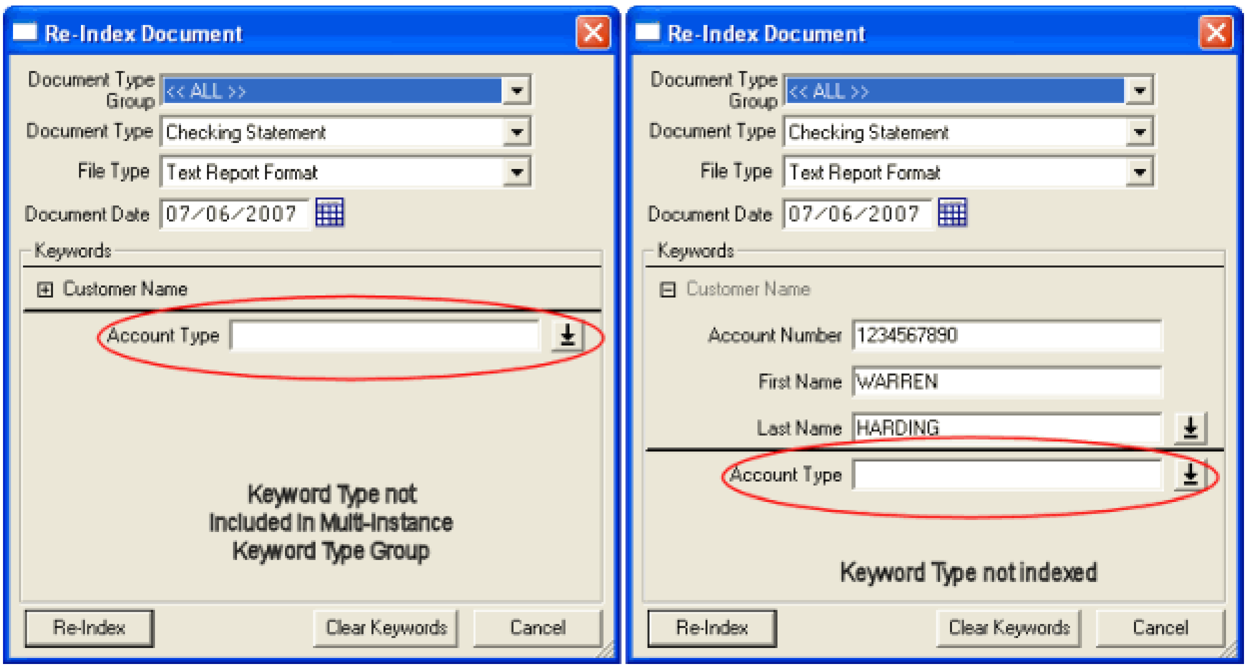
- **Notes and Annotations**

  When re-indexing a revisable document with notes or annotations, the notes or annotations are not transferred to the next revision. The notes or annotations are only retained on the original document.

AutoFill Keyword Set in a Multi-Instance Keyword Type Group

An AutoFill Keyword Set will only populate the items that are included in the Multi-Instance Keyword Type group.

- It will disregard all Keyword Values of Keyword Types not included in the group, even if the Keyword Type is assigned to the Document Type and available for indexing. This applies to AutoFill Keyword Sets associated at both the Keyword Type level and the Document Type level.



- When indexing or re-indexing a document, entering an AutoFill Keyword Set Primary Keyword Value will add a new instance of the Multi-Instance Keyword Type Group containing the AutoFill Keyword Set values. The AutoFill Keyword Set will only be applied to an existing instance if it is completely blank.
- When re-indexing a document associated with a Keyword Type Group filled by an AutoFill Keyword Set to another Document Type associated with the same Keyword Type Group filled by an AutoFill Keyword Set, Keyword Values may be unexpectedly overwritten by the AutoFill Keyword Set.

  For more information, see Considerations for Re-Indexing Documents and Adding or Modifying Keyword Values on page 109.

Overriding the Primary Keyword Value on a Document Containing an AutoFill Keyword Set

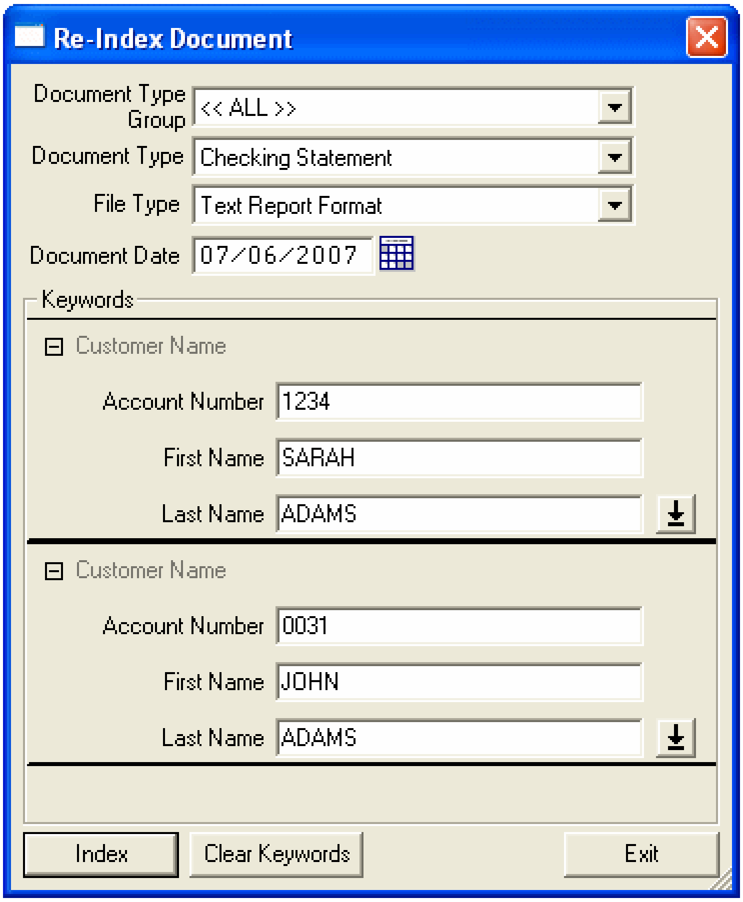
If a document exists in the system and has been indexed using an AutoFill Keyword Set, ensure that you know the outcome of changing (overriding) the value of the Primary Keyword.

- If you want to change (override) the Primary Keyword Value, but you do not want to change the Secondary Keyword Values, you must do it using **Add/Modify Keywords**, not **Re-Index**.

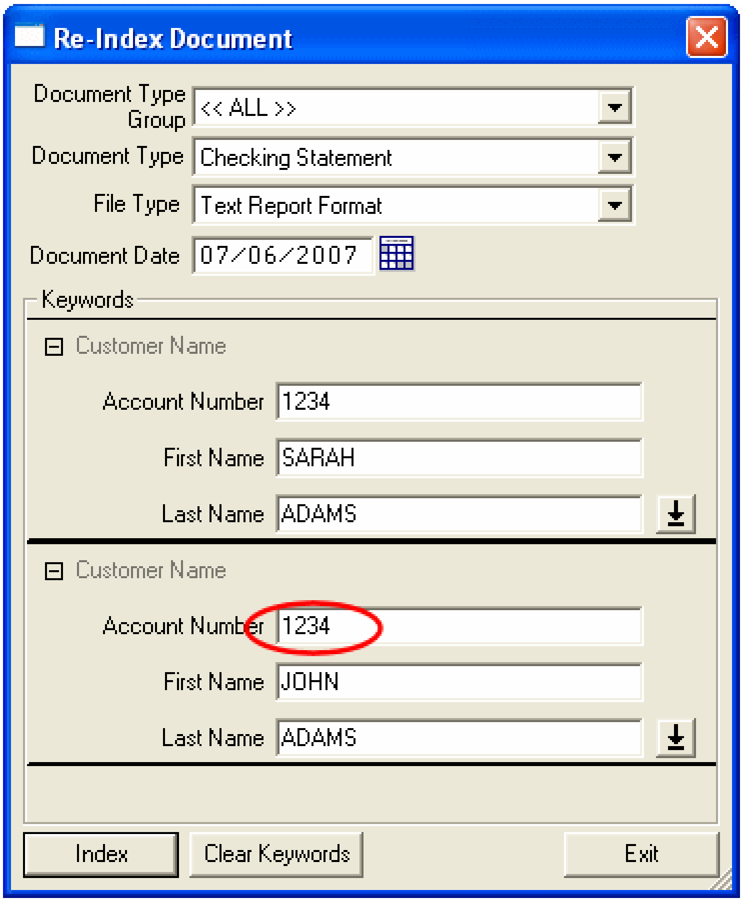
  For more information, see Accessing an Existing Document's Keyword Values on page 312.
- Re-index always respects the values of the AutoFill Keyword set. After you change the Primary Keyword Value, the system will override any Secondary Keyword Values to respect the values of the set for the new Primary Keyword Value. Even if you do not manually trigger the AutoFill after changing the value, it will automatically trigger the associated AutoFill Keyword set upon clicking **Index**.

- This is especially crucial if you have two instances of a Multi-Instance Keyword Type Group on a document. For example:

  The document being re-indexed in the dialog box below is associated with two instances of the same Multi-Instance Keyword Type Group using the **Account Number** Keyword Type as the primary Keyword Type.

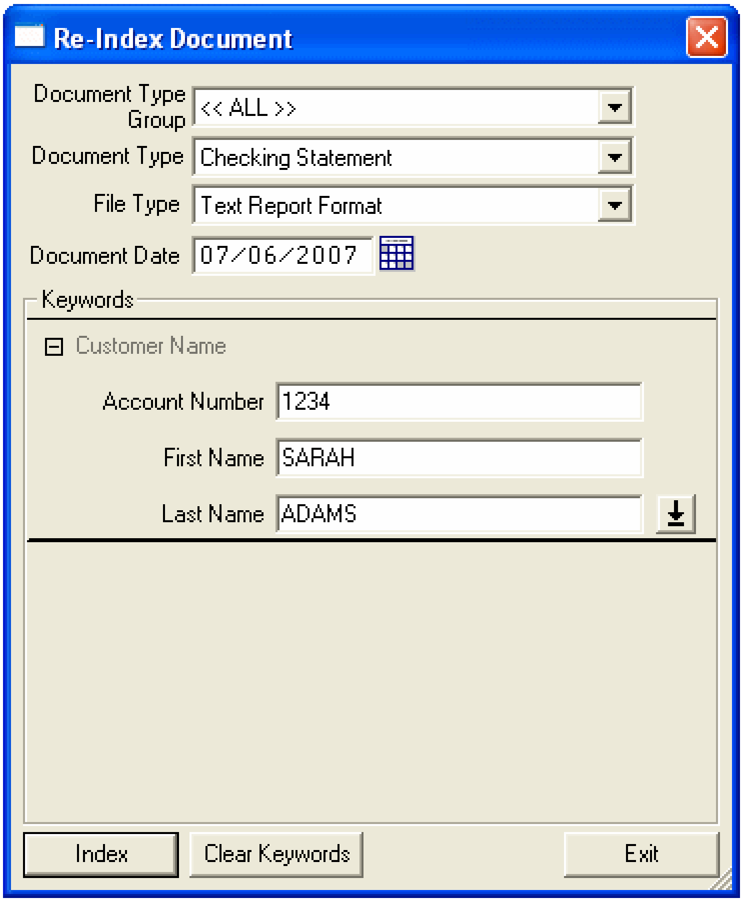


The Primary Keyword Type Value of the second instance Multi-Instance Keyword Type Group has now been replaced with the value of the Primary Keyword Type of the first instance of the Multi-Instance Keyword Type Group.



Upon clicking **Index,** the system overwrites the Secondary Keyword Values of the second instance of the Multi-Instance Keyword Type Group with the values associated with the new Primary Keyword Value.

The system recognizes that both instances of the Multi-Instance Keyword Type Group contain the same values, and one of the instances is removed from the document.



Note: It is recommended that if you want more than one set of Secondary Keyword Values to be applicable for one Primary Keyword Value, you add additional sets to the AutoFill Keyword Set Type in **AutoFill Keyword Management** rather than use overrides. Your User Group must have rights to the AutoFill Keyword Set in order to view or modify it in the AutoFill Keyword Set Management.

Keyword Type Groups

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

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

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

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

Multi-Instance Keyword Type Groups

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

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

Tip: To remove an entire instance of a Multi-Instance Keyword Type Group while indexing or re-indexing, place the pointer inside any of the Multi-Instance Keyword Type Group's Keyword Type fields and press **Ctrl+Del**.

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

Creating Documents (Advanced)

Creating a Document

In most cases new documents are created by importing them. In addition to importing documents, you can create new documents from an existing document or from a thumbnail. The newly created document will be of the same file type as the original document.

The new document created can become a revision of an existing selected document or an entirely new document.

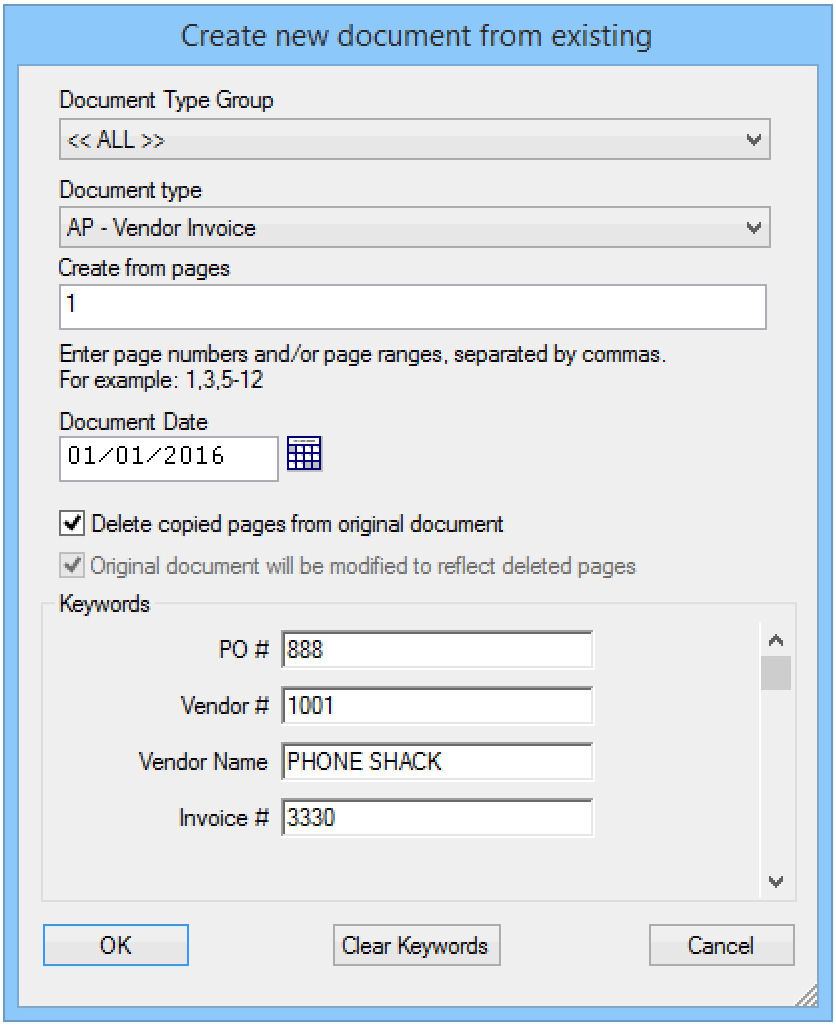
Note: A revisable document will not have its initial revision created until it has been indexed. Prior to indexing, all changes to the document will not create a new revision.

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

Creating a New Document from an Existing Document

1. To create a new image document from an existing one, right-click on a document from the **Documents Search Results** list, right-click on an open document, or right-click on a document's status bar, and select **Send To | Create New Document**.

   The **Create new document from existing** dialog box is displayed.



2. Select the **Document Type Group** for the new document.

3. Select the **Document Type** for the new document.

Note: If you select a different Document Type during document creation, Keyword Values for common Keyword Types are retained. For example, if there is an existing value for the **City** Keyword Type, and you select a different Document Type also containing the **City** Keyword Type. The original **City** Keyword Value is retained. If the selected Document Type contains a default value for a Keyword Type that already as a value, the Keyword Type is duplicated on the document.

4. In the **Create from Pages** field, specify the page(s) to include in the new document.
   - To specify a range of pages, type the start page-end page (e.g., pages **4-6**).
   - To specify multiple pages that are not within a range, use commas to separate the pages (e.g, pages **1, 3, 5-12**).

Note: If the original document is a single page, this option will not be available.

5. The **Document Date** field allows you to assign a date to the new document. Often, this is the date the document was created or received.
6. If necessary, select **Delete copied pages from original document** to delete the selected pages from the original document.

Note: If the original document is a single page, this option will not be available.

Note: When **Delete copied pages from original document** is selected, **Original document will be modified to reflect deleted pages** is visible, enabled, and uneditable.

7. Keyword Values are inherited from the original document. Click **Clear Keywords** and re-index the new document if necessary.
8. Click **OK** to create the new document.
9. The new document is automatically displayed.

Creating a New Document from Thumbnails

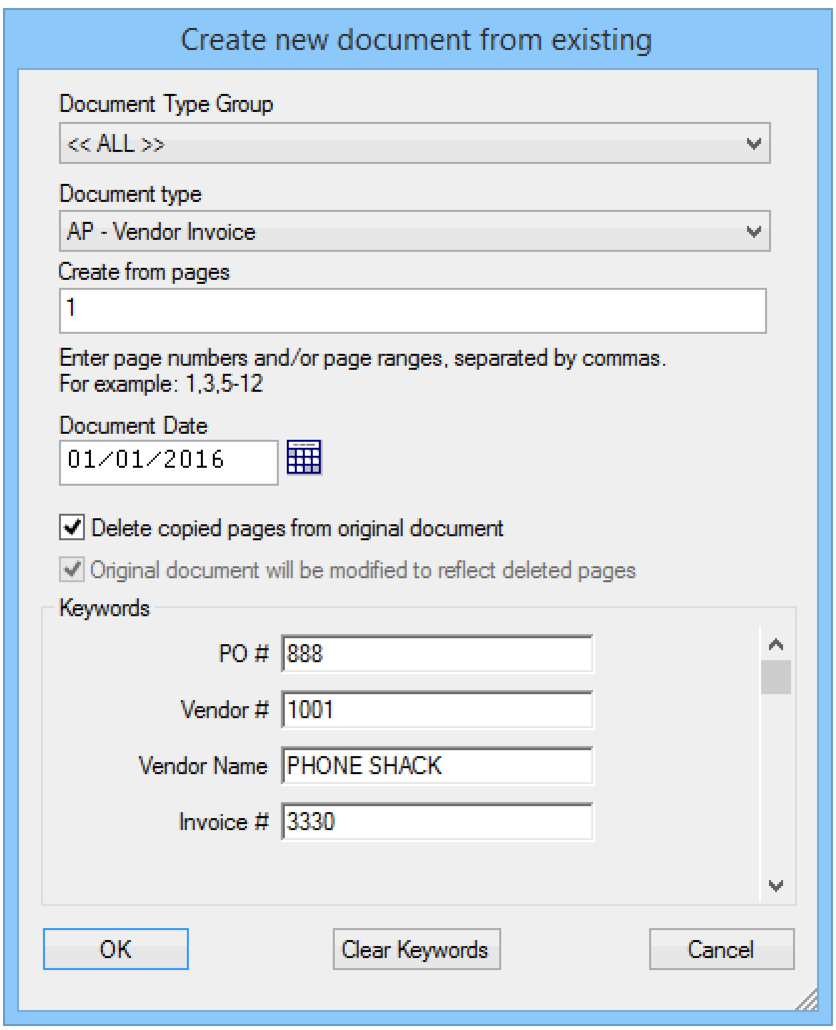
Creating a New Document from a Single Page

1. From the open image document, right-click and select **Thumbnails**, or select **Document | Thumbnails** from the main menu bar.
2. To create a new document from the current page, drag the desired thumbnail to the system desktop, as shown in this example. The system prompts you with **Do you wish to create a new document from this page?**
3. Select **Yes** to create a new document. The new document is stored in the same document type as the original document.

4. After creating the new document, you can choose to delete the original page or allow it to remain in the system.
   a. If you create a document from a multi-page original, you are prompted with **Are you sure you wish to delete this page?**
   b. If you are creating a document from a single-page document, you are prompted with **Deleting this page will delete the entire document, continue?**
5. Select **Yes** to delete the page or entire original single-page document. Select **No** to retain it.

Creating a New Document from a Range of Pages

1. Display the thumbnails for an open image document by right-clicking and selecting **Thumbnails** or by selecting **Document | Thumbnails** from the main menu bar.
2. Right-click on an empty area of the thumbnail display bar. The cursor changes from an arrow to a document with a hook through it.
3. The **Create new document from existing** dialog is displayed.



4. Select the **Document Type Group** for the new document.

5. Select the **Document Type** for the new document.
6. In the **Create from Pages** field, specify the page(s) to include in the new document.
    - To specify a range of pages, type the start page-end page (e.g., pages **4-6**).
    - To specify multiple pages that are not within a range, use commas to separate the pages (e.g, pages **1, 3, 5-12**).

Note: If the original document is a single page, this option will not be available.

7. The **Document Date** field allows you to assign a date to the new document. Often, this is the date the document was created or received.
8. If necessary, select **Delete copied pages from original document** to delete the selected pages from the original document.

Note: If the original document is a single page, this option will not be available.

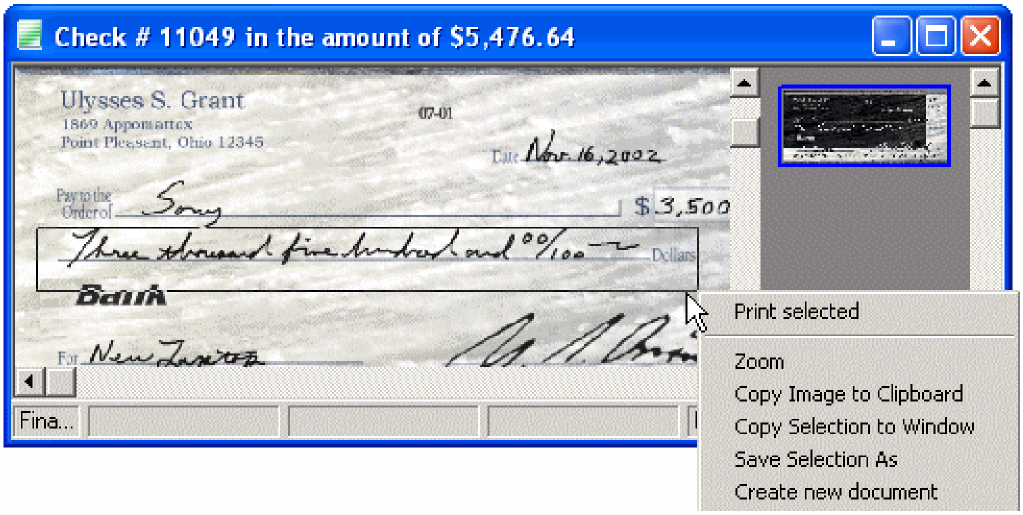
Note: When **Delete copied pages from original document** is selected, **Original document will be modified to reflect deleted pages** is visible, enabled, and uneditable.

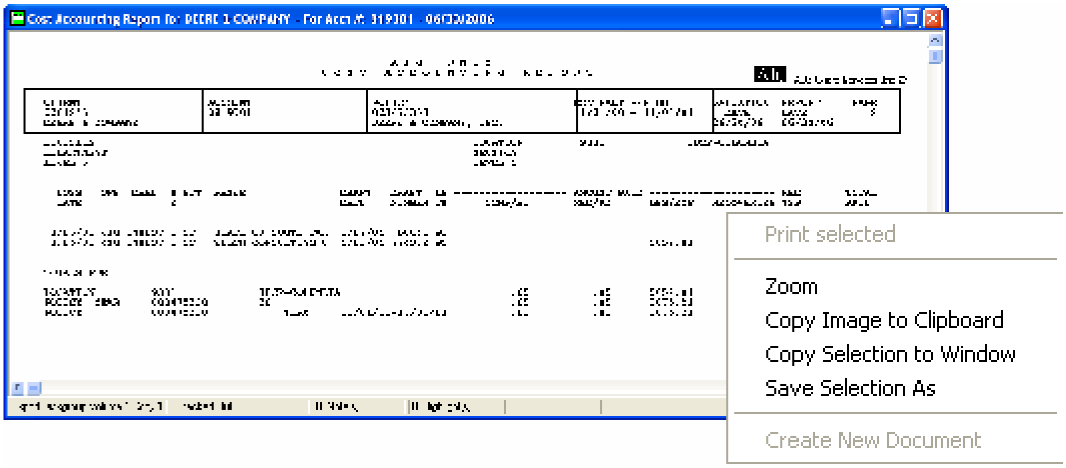
9. Keyword Values are inherited from the original document. Click **Clear Keywords** and re-index the new document if necessary.
10. Click **OK** to create the new document.
11. The new document is automatically displayed.

Using the Rubber Band

You can zoom in on a portion of an image document and print, save or create a new document from the zoomed in area using the **rubber band** feature.

1. Press and hold the **Ctrl** key on the keyboard, and click on the document.
2. With the **Ctrl** key still pressed, click and hold the left mouse button while dragging the area on the document that you wish to select. When you have the desired area selected, release the mouse button and a menu displays with several options. This works for both images and text documents.





Rubber Band Options	Description
Print Selected	Sends the selected portion of the document to a local printer. After the **Print** dialog box is displayed, a message asking, "Do you want the zoom region resized to fit the printed page width?" is displayed. • Select **Yes** to resize the selected area to the fit the width of the printed page. • Select **No** to print the selected area in its true size. • Select **Cancel** to exit without printing. **Note:** This option is not available when selecting a portion of a text document with an overlay applied to it.
Zoom In	Magnifies the view of a document.
Copy Text to Clipboard	Copies the rubber-banded text to the clipboard. **Note:** This option is only available for text documents when an overlay is applied.
Copy Image to Clipboard	Copies the rubber-banded area to the clipboard.
Copy Selection to Window	Copies the rubber-banded area to a window. This window can be repositioned and remains open, even after the document has been closed or you move to a different page in the document. To move the window, right-click on the new window and select **Arrange** or **Arrange All | Top**, **Left**, **Right**, or **Bottom**.

Rubber Band Options	Description
Save Selection as	Lets you save the rubber-banded area in the current file format or another image file format. Enter a path and file name for your new image document. Select a file type from the list of available types. The **Save As** dialog box displays. Some file formats allow you to select dithering options. Dithering is used to create additional colors and shades from an existing palette by interspersing pixels of different colors. On a monochrome display, areas of gray are created by varying the proportion of black and white pixels. In color displays, colors and textures are created by varying the proportions of existing colors. **Note:** You can save the entire image as an image file by opening the image and clicking **Save As** from the **File** menu. The **All** button will be selected in the **Save Range** area. Type in the file name and directory paths for the new image file you want to create. From the **Save File as Type**, select the format that the image will be saved as from the drop-down list. If the drive to which you are saving the copied image file has not been mapped, you can click the **Network** button and map the drive. Select the drive to be mapped from the **Drive** drop-down list. From the **Path** drop-down list, select the name of the drive that you want the drive to be on your computer. Click **OK**.
Create New Document	Creates a new document from the image contained in the rubber-banded area. After selecting this option, the **Create new document from image snippet** window appears. Select the **Document Type**, **File Type**, **Document Date** and Keyword Values to associate with the new document. Click **Import** to import the document, **Clear** to remove the currently displayed values, or **Exit** to escape without importing.

Modifying Documents Using Notes and Annotations

You can use notes and annotations to add or call attention to information on documents stored within your OnBase system.

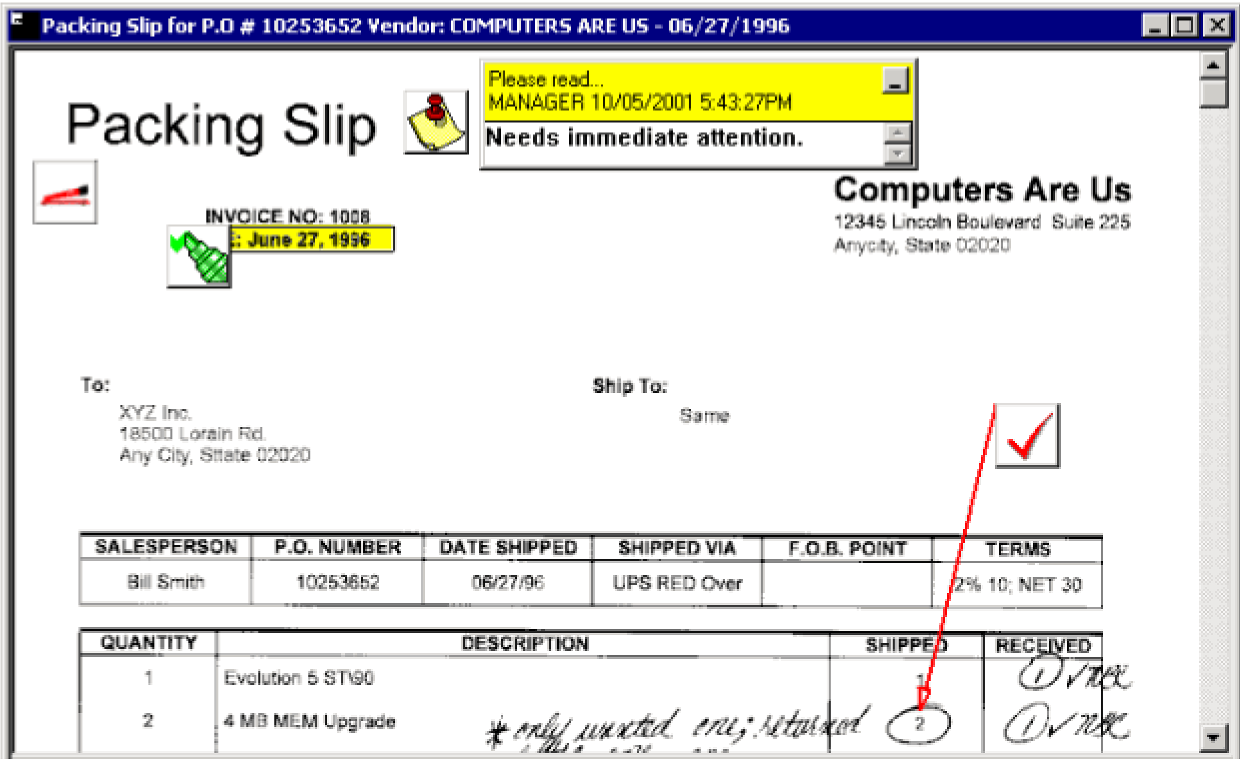
Note: Viewing or modifying the position of notes on PDF documents is not supported in the OnBase Client.

Note: When exporting a document to a PDF (such as with **File | Save As**):
If the original file type was PDF, any Notes and Annotations will be exported as Comments on the resulting PDF.
If the original file type was not PDF, any Notes and Annotations will be burned directly onto the resulting PDF.

Available Types of Notes

Notes on an open document are represented by icons. You can view the contents of a note by double-clicking that note's icon to open the note window.

Several types of notes are available - the following example shows a text-based note (pushpin), a red arrow-style annotation (check mark), and a highlight note (highlight marker). The stapler icon on the document indicates that other documents are stapled to this one.



- **Text-Based** - Contains text comments.
- **Annotation** - Contains text comments and graphics to attract attention, such as an arrow, circle, color or overlapping text.
- **Redaction** - Blocks out part of a document.
- **Staple** - Attaches related documents together.

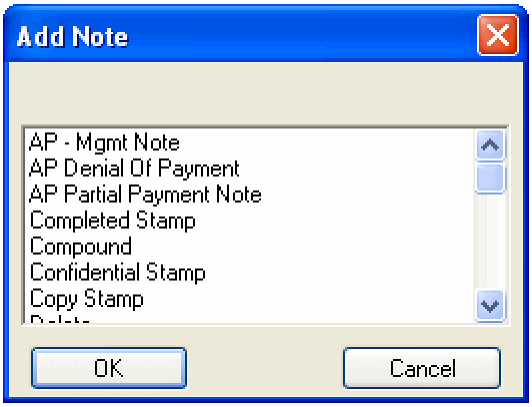
Adding or Modifying Notes

Adding Notes

1. While viewing a document, open the **Add Note** dialog box by performing one of the following actions:
   - Select the **Attach Note** toolbar button.
   - Click **Notes | Add Note** from the right-click menu of a text or image document.
   - Select the **Document | Add Note** menu item.

- Press **Ctrl + N**.

Note: Depending on your system's configuration, you may be able to use a keyboard shortcut to create specific Note Types. Contact your system administrator if you have questions about using shortcuts to create notes.



2. Double-click on the Note Type to add, or select it and click **OK**. The note window box is displayed.

Note: Any time or date in the note Auto-Name string (top line of the note header) respects the Windows Region and Language settings of the user applying the note at the time the note is added. The time and date in the second line of the note header respect the Windows Region and Language settings of the user currently viewing the note.

3. Enter text into the note dialog box.

Note: Notes are limited to 249 characters when entering the note text in the OnBase Client. If the note text is entered in the Unity Client or Web Client, the note can contain up to 250 characters, all of which are properly displayed in the OnBase Client.

4. Click the Minimize icon in the upper right corner to minimize the note window. Your changes are saved and the note is minimized to an icon.

Viewing or Modifying Notes

When minimized, a note is displayed as an icon. To view notes and their contents from an open document, double-click on the note icon or open the **Select Note** dialog box.

The **Select Note** dialog box displays a list of notes in the document. Double-click on a note in the list to open the document and display the page that contains the note. To open the **Select Note** dialog box, perform one of the following actions:

- Click on the **Open Note** toolbar button.
- Right-click on the document and choose **Notes | View Notes,** or select **Document | View Notes** from the main menu bar.
- Double-click the **Note(s)** area of the status bar at the bottom of the document window.

Tip: The **Select Note** dialog box can be used as a list of bookmarks for a document. By adding a section title at the beginning of each note, such as “Overview,” “Table of Contents,” etc., and placing the note at the beginning of that section, you can view a list of sections in the **Select Note** dialog box. Clicking on a note scrolls the document so that area is displayed.

Note: Depending on your system’s configuration, you may be unable to open certain notes in the **Select Note** dialog box. See your system administrator if you have any questions.

Sorting Notes

You can rearrange the order notes are displayed in the **Select Note** window.

Note: Sort options do not affect the order notes appear on the document - only the order that the notes appear in the **Select Note** window.

To sort notes:

- Open the **Select Note** dialog box, then select a note, right-click and select a sort method. You can sort notes using the following options:

Sort Method	Description
Page Number (Ascending)	Select this option to sort the notes by page number, beginning with the first page a note appears on. This option is selected by default.
Page Number (Descending)	Select this option to sort the notes by page number, beginning with the last page a note appears on.
Note Date (Ascending)	Select this option to sort the notes by the date the note was placed on the document, with the oldest note appearing first.
Note Date (Descending)	Select this option to sort the notes by the date the note was placed on the document, with the most recent note appearing first.

Deleting Notes

Note: Depending on your system's configuration, you may be unable to delete certain notes. Contact your system administrator if you have questions.

To delete a note, perform one of the following actions:

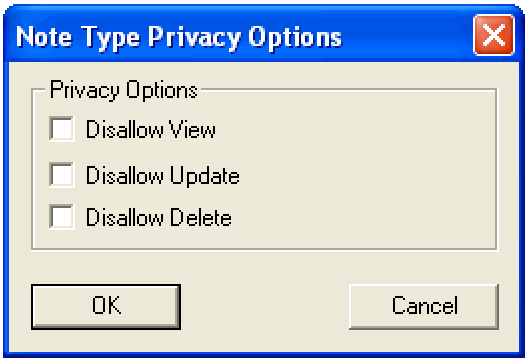
- Select or open the note, right-click and select **Delete Note**.
- On an open document, right-click on the document or status bar and select **Notes | View Notes**. The **Select Note** dialog box is displayed. Select a note, right-click and select **Delete Note**.

Unobstructing Notes

If a note icon is covering information on your document, you can temporarily render it invisible by right-clicking on the note icon and selecting **Unobstruct**. The note icon will remain invisible until you move the mouse or click the left or right mouse buttons.

Note Type Privacy Options

Depending on your system's configuration, you may be able to set privacy options for notes that you have created. Privacy options are used to determine whether or not other users can view or change a note that you have created.



Note Options	Descriptions
Disallow View	Prohibits all other users from viewing the note. **Note:** If this option is selected, other users can still successfully search for text in the note, though they will not be able to view the note.
Disallow Update	Prohibits all other users from editing the note.
Disallow Delete	Prohibits all other users from deleting the note.

Note: Users with administrative rights will always be able to view, update, and delete your notes.

Saving Note Position

When the note window is first opened, it appears in the note default position on the open document. To change the note position, click and drag the note to a new location. To save the new position, click **Save Note Position** from the right-click menu.

As you scroll through the open document, the note remains stationary and the document scrolls behind the note, if you remain on the page where the note is positioned.

Note: When adding a note to a Microsoft Office document, it is considered a best practice to position the note away from the ribbon. Positioning the note on the ribbon will obstruct the note until the ribbon is collapsed.

Note: This behavior does not apply to OLE, PDF, or HTML form documents, where notes remain positioned in the viewer, regardless of where you scroll.

Changing Note Type

To change the type of note, right-click on it and select **Change Note Type**. Select the new type and click **Change Note**.

Note: You can only change the Note Type when working with text-based notes.

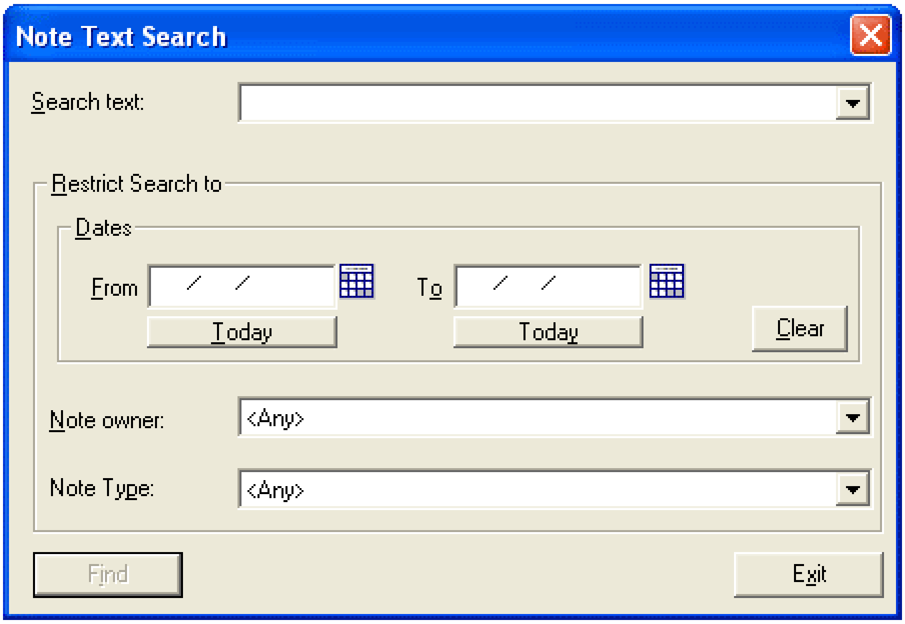
Searching for Notes

The **Note Text Search** feature allows you to search documents for notes by Note Type, by note text, or by the creator of the note. The search can also be restricted by the date the note was created.

Note: Depending on your system's configuration, note searches may be case-sensitive. See your system administrator if you have questions.

To execute a **Note Text Search**, follow these steps:

1. From the **Document Retrieval** dialog box, select the Document Types to search and click **Note Search**. The **Note Text Search** dialog box is displayed:

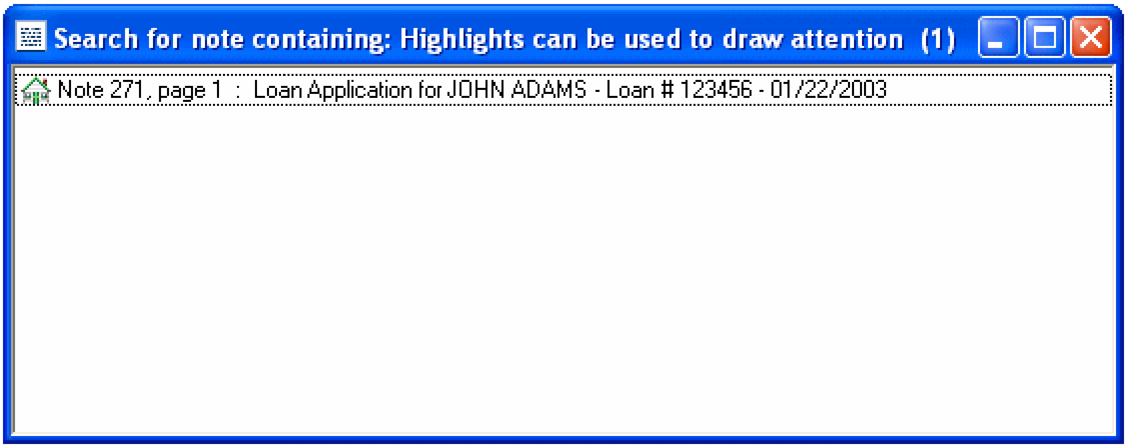


2. Enter your search terms into the **Note Text Search** dialog box.

Option	Description
Search text	Enter the text to search for. The drop-down list displays previous searches performed during the current session.
Restrict Search to	Notes can be searched for by **Dates**, **Note Owner** or **Note Type**. Enter the criteria to search for. If these items are not specified, all Note Types are searched according to the text specified in the **Search for** field. **Note:** The **Note Owner** drop-down list includes users that have been deleted from the system.

3. Click **Find** to search the selected Document Type(s) for any notes that match your search term(s).

4. If any notes matching your search terms are found, they are displayed in the **Search for note containing: <Search Term> (<Number of Results>)** dialog box.



   Each result listed in the **Search for note containing: <Search Term> (<Number of Results>)** dialog box displays the internal note number associated with the note and information about the document with which the note is associated, including the Auto-Name string of the document and the page number where the note is located.
5. Double-click on the search result to open the document to the page where the note is located.

Searching for Notes Using Custom Queries

Depending on your system setup, you may be able to use Custom Queries that display Note Properties of retrieved documents.

Highlighting

A highlight draws attention to an area within a text or image document. Adding highlights and modifying them is similar to adding and modifying notes. You can add highlights in two different ways.

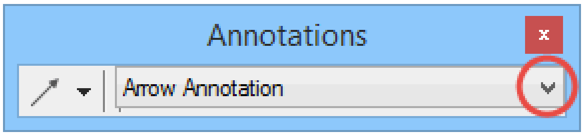
- Using the **Create Highlight** Toolbar Button
- Using the **Annotation Toolbar**

Using the Create Highlight Toolbar Button - Text Documents

1. From an open text-based document, click and drag over the area where you want to place the highlight.
2. Select **Create Highlight** from the menu that appears, or click the **Create Highlight** Toolbar Button.
3. Select a highlight type from the **Choose highlighter** dialog box.
4. Click **Highlight** to put the highlight at the specified area.

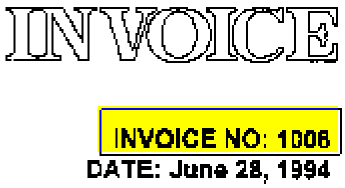
Using the Annotation Toolbar - Text or Image Documents

1. Open the text or image document and select a highlight type. Click the **Annotation type** button on the Client Toolbar and select a highlight type from the drop-down list.

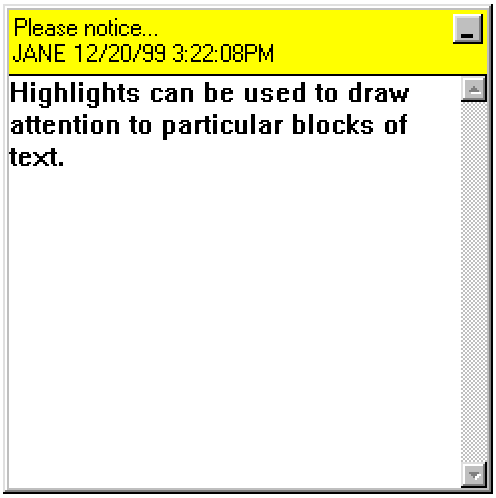


Note: If the annotation toolbar is not currently displayed, right-click on the OnBase desktop and select **Annotation Toolbar**. Your cursor must be located on the OnBase desktop rather than the document to use this right-click option.

2. Select the text that you wish to highlight. Click and drag the mouse over the area of the document that you want to highlight.



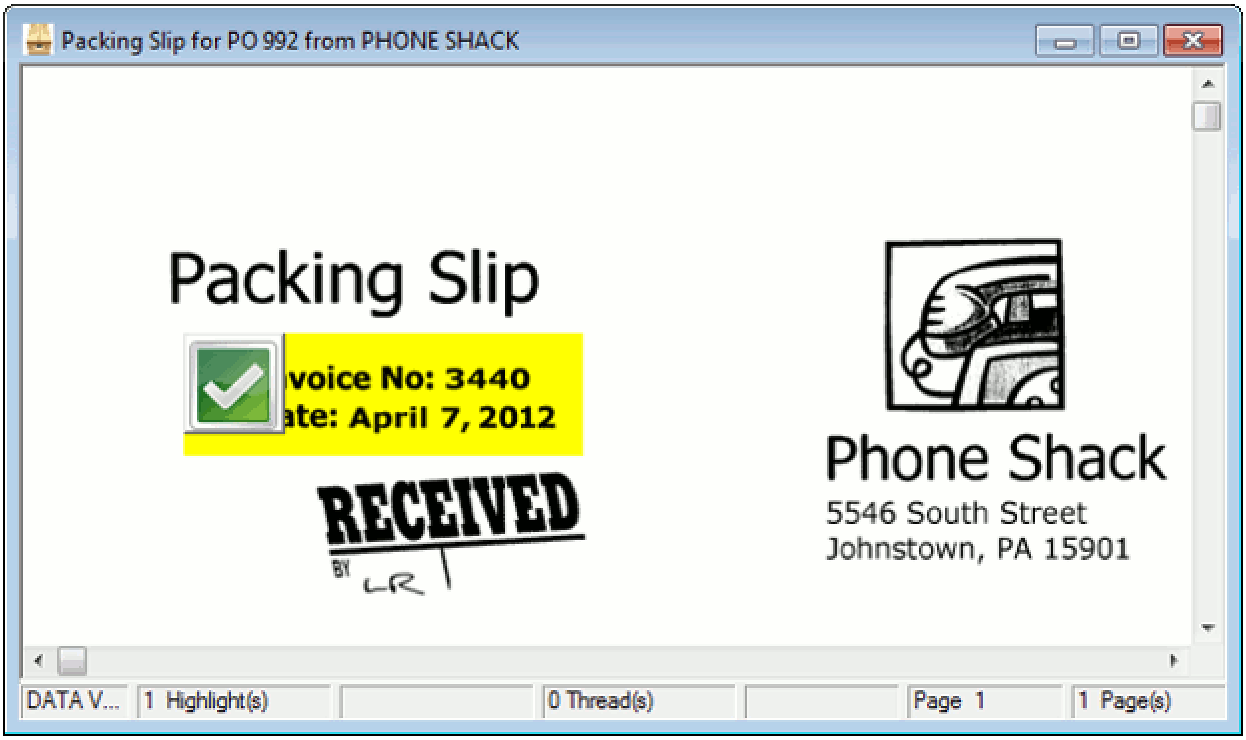
3. The highlight may display a note containing default text. You may be able to add or change the note text. Some note boxes may be blank, allowing you to add text as needed. For example:



4. To close the highlight box, click the **Minimize** icon in the upper right corner. The highlighted text is displayed with a highlight icon positioned in the upper left corner of the highlighted area.

Viewing Highlights

The highlight displays in a bright color and may have a highlight icon in the upper left corner. Example:



If an icon is present, a note box is associated with the highlight. A note box allows you to view and/or add information to a highlight. To open the highlighted note box and view the default text, double-click on the highlight icon.

The highlight icon may cover text you wish to view. To move the highlight icon, right-click on it and select **Unobstruct**. The highlight icon is invisible until you move the mouse again.

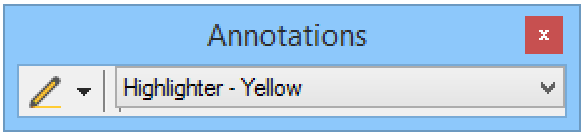
Deleting Highlights

To delete a highlight, right-click on the highlight icon and click **Delete Note**.

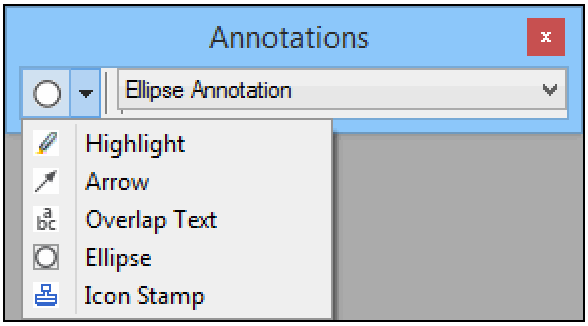
Creating an Annotation

To create an annotation, follow these steps:

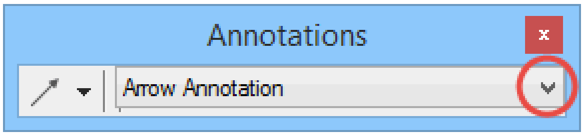
1. Ensure that the **Annotations** toolbar is displayed on the Client desktop.
   If the toolbar is not displayed, enable it by right-clicking anywhere on the blank desktop to obtain the desktop pop-up menu. Select **Annotation Toolbar**.



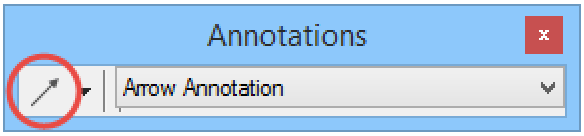
2. At the **Annotations** toolbar, select the type of annotation at the **Annotation Object** drop-down menu.



3. The **Annotation Name** drop-down is updated to list only annotations of the selected style. Select the name of the annotation to be used.



4. Enable drawing for the selected annotation by pressing the **annotation icon**.



5. Using the mouse, define the location and size of the annotation by clicking and dragging the cursor over the desired portion of the image. Release the mouse button when selection is complete.

Note: Ensure that the annotation is large enough to be visible. Annotations are required to be a certain size before they can be created and saved.

Moving an Annotation

To move an annotation, follow these steps:

1. Select the Annotation's icon and drag it to a new position. The annotation itself will remain in the original position.

Note: Depending on your system's configuration, you may not see an icon. If this is the case, contact your system administrator.

2. Right-click and select **Save Note Position**. Your annotation will be moved to the location of its icon.

Redacting Document Using Redaction Annotations

A **Redaction Annotation** is a specialized annotation that can be used to hide information on an image document. The redaction becomes a permanent part of the document and cannot be independently manipulated.

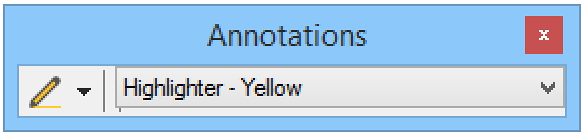
Note: Redaction functionality is not available for PCL documents.

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

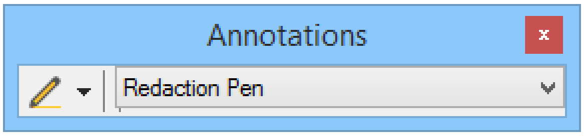
Creating a Redaction Annotation

1. Ensure that the Annotation Toolbar is displayed on the desktop.

   If the toolbar is not displayed, enable it by right-clicking anywhere on the blank desktop. Select **Annotation Toolbar.**

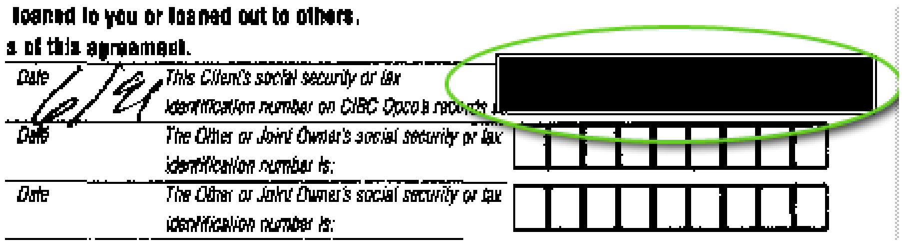


2. At the **Annotation Toolbar**, use the **Annotation Type** drop-down menu to select an annotation style that contains redaction annotations.



3. The **Annotation Name** drop-down is updated to list only annotations of the selected style. Select an annotation that has been configured for use as a redaction.

4. Enable drawing for the selected annotation by pressing the annotation toolbar button.
5. Using the mouse, define the location and size of the annotation by clicking and dragging the cursor over the desired portion of the image. Release the mouse button when selection is complete. The redaction annotation is shown in the displayed document.



6. Create a redacted image by right-clicking and selecting **Create Redacted Image**. Depending on your system's settings, this redacted document is saved to another Document Type (the original document may also be deleted in this scenario), is saved as a revision of the current document, or replaces the original document. The redaction will only appear on the thumbnail after **Create Redacted Image** is selected from the right-click menu.

Note: The **Create Redacted Image** right-click option is only available if the document is an image or Image Rendered PDF file format, and the Document Type is configured to use redactions.

After selecting **Create Redacted Image**, the **Confirm** dialog box is displayed.

7. Select **Yes** to delete the redaction annotations from the original document. This will not affect the newly created document.

   Select **No** to keep the redaction annotations on the original document.

Note: Depending on your system's configuration, these annotations may be deleted even if you select **No**. See your system administrator if you have questions.

Deleting a Redaction

To view an image file format in its original format, prior to redactions, from the document's right-click menu, select **Renditions | Image File Format** to return to the original document.

If you wish to delete the redactions permanently, right-click on each redacted highlight and click **Delete Note**. This removes all redacted highlights from the image file format document, but leaves them on the redacted image file format document.

Redacting Documents Using Redaction Bitmaps

In addition to standard redactions, images can also be redacted using a bitmap image (Redaction Bitmap), which is burned permanently into the image document. Redacted images can be used to create tamper-proof markings, such as a signature, or a check mark on a drug test result form.

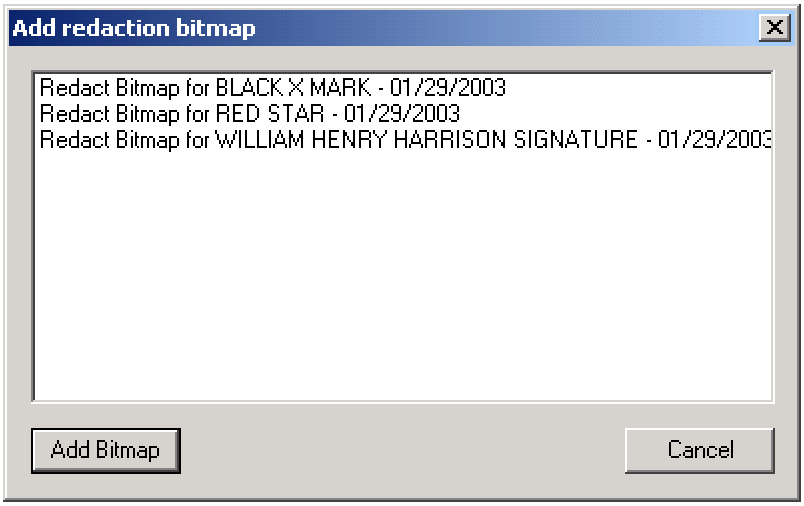
You can apply and manage redaction bitmaps with the **Redaction Bitmaps** right-click menu options.

Note: Redaction functionality is not available for PCL documents.

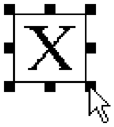
Caution: If a note, redaction, burned markup, or deficiency is not in the location you expect, do not save or sign the document until the location has been corrected by your system administrator. When the document is saved or signed, the pending redaction, burned markup, or deficiency is permanently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

Creating a Redaction Bitmap

1. Right-click on an open image document or the document's status bar and select **Redaction Bitmaps | Insert redaction bitmap**. The **Add redaction bitmap** dialog box displays a list of available bitmaps.



2. Select a bitmap and click **Add Bitmap**.
3. The selected bitmap appears on the document, but it is not a permanent part of the document yet.
   - To reposition the bitmap, click and drag it to a new position.
   - To resize the bitmap, select it; then click and drag the edge or corner handles of the bitmap until the bitmap is the right size.



4. When you are finished adding and editing bitmaps, you can make them a permanent part of a redacted image.

   For more information, see Creating a Redacted Image.

Deleting a Redaction Bitmap

You can delete either the selected or all redaction bitmaps from a document as long as they have not been saved to the document. To delete a redaction bitmap, right-click on an open image document, or the document's status bar, and choose **Redaction Bitmaps.** Then perform one of the following actions:

- Select **Delete redaction bitmap** to delete selected redaction bitmaps.
- Select **Delete all redaction bitmaps** on the document to delete all redaction bitmaps.

Creating a Redacted Image

To create a redacted image, right-click the document and select **Create redacted image**.

Caution: Ensure you are satisfied with the bitmap before performing this step. Performing this action makes the bitmap a permanent part of the document, and it can no longer be moved or deleted.

If the document is black and white and the bitmap is color, a warning message is displayed. Click **Yes** to convert the document to color, or click **No** to save a black and white document with a black and white redaction. The original bitmap available for selection in the system will remain a color image.

Documents can be saved many ways before they are brought into the system. A document may have been saved as a color document, even if the only colors used are black and white. This message will only appear when you are saving a color bitmap to a true black and white document.

Note: The redaction will only appear on the thumbnail after **Create Redacted Image** is selected from the right-click menu.

Note: Creating a redacted image from a redaction bitmap differs from creating a redacted image using a redaction annotation. When you create a redacted image using a redaction annotation, a rendition is created. This means you can view the original document, as well as the redacted rendition. When you create a redacted image using a redaction bitmap, the redaction is burned directly into the original document and a rendition is not created.

Stapling Documents Together

Staples attach documents together. In most cases, a logical relationship is established between documents that are stapled together. For example, documents related to a single customer can be stapled together or an invoice and its associated purchase order can be stapled together. The system does not require a logical relationship between stapled documents.

Note: In order to staple documents, the **Use Same Window** option check box (in the **Display Options** of the **Document** tab in the **User Options** dialog box) must be deselected. Documents must be in separate windows in order to be stapled to one another.

A staple is considered a type of note and the status bar of a document will display the number of notes applied.

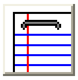
For more information about the staple, double-click on the note status bar (at the bottom of the document window). The **Select Note** dialog box will display, indicating details of each note, including whether the staple is a front staple (initial document) or a back staple (secondary document dropped onto the initial document).

Note: For documents consisting of multiple revisions, Staple icons appear on all revisions. When viewing a stapled document from any revision of an open document, the latest available revision of the stapled document is displayed.

From Open Documents

To staple open documents together:

1. Open the primary document to which other documents will be stapled.
2. Open the secondary document(s) that you want to staple to the primary document.
   If the secondary document is an OLE document or E-Form, see From a Document Search Results List on page 142.
3. Right-click on the secondary document and drag it onto the primary document.
4. A staple icon is displayed on the primary document.

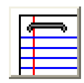


5. A back staple icon is displayed on the secondary document.

From a Document Search Results List

To staple a secondary document to a primary document from the Document Search Results list:

1. Open the primary document to which other documents will be stapled.
2. Select the secondary document in the Document Search Results list.
3. Right-click on the secondary document and drag it onto the primary document.
4. A staple icon is displayed on the primary document.



5. Open the secondary document.
6. A back staple icon is displayed on the secondary document.

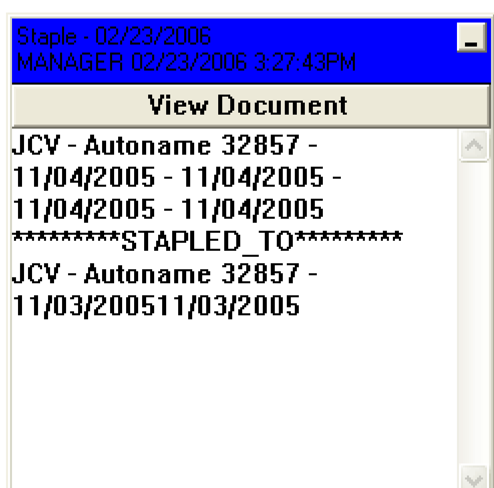
Viewing Stapled Documents

When viewing stapled documents, consider the following:

- When viewing a stapled document from any revision of an open document, the latest available revision of the stapled document is displayed.
- If the document stapled to the current document has been deleted, an error message is displayed.

To view a stapled document:

1. Double-click the staple icon on the document. The **Staple** window displays.



2. Click **View Document** to open the document stapled to the current document.

Editing Staples

1. Double-click on the staple icon on the document. The staple note is displayed.
2. Edit any corresponding text.

Deleting Staples

1. Right-click on the staple icon and select **Delete Note**.
2. If you delete a staple on one document, the corresponding staple on the document that was attached to the deleted staple remains. If you do not want the staple on the corresponding document, you must delete it also.

Printing Documents

Access to printing is available throughout the system. When documents are selected for printing, the **Print** dialog box is displayed.

You can print a document by performing any of the following actions:

- Select the **File | Print** option from an open document or from a Document Search Results List.
- Right-click an open document and select **Print.**
- Click the **Print** toolbar button.
- Drag one or more documents to the appropriate print queue (see Dragging-and-Dropping Documents into a Print Queue on page 158).

Note: Microsoft Word documents that contain an automatically updating SaveDate field in the header should be printed using the Office Business Application. Printing these documents from within the OnBase Client will update the SaveDate field to the current date.

Viewing a Print Preview of an E-Form

You can view a print preview of an E-Form document that is open in the Document Viewer by right-clicking the open E-Form and selecting **Print Preview**.

The print preview of the E-Form is displayed in the **Print Preview** window associated with Microsoft® Internet Explorer. You can use the view settings and page setup controls in the **Print Preview** window to adjust how the E-Form is displayed and printed.

Printing XML Documents

Depending on the Document Type settings, you may be able to print the document with no .xsl style sheet applied, with the style sheet that you currently have applied for viewing, or with a style sheet that is set up to print by default.

Printing XML Documents with Style Sheet Based on Document Type

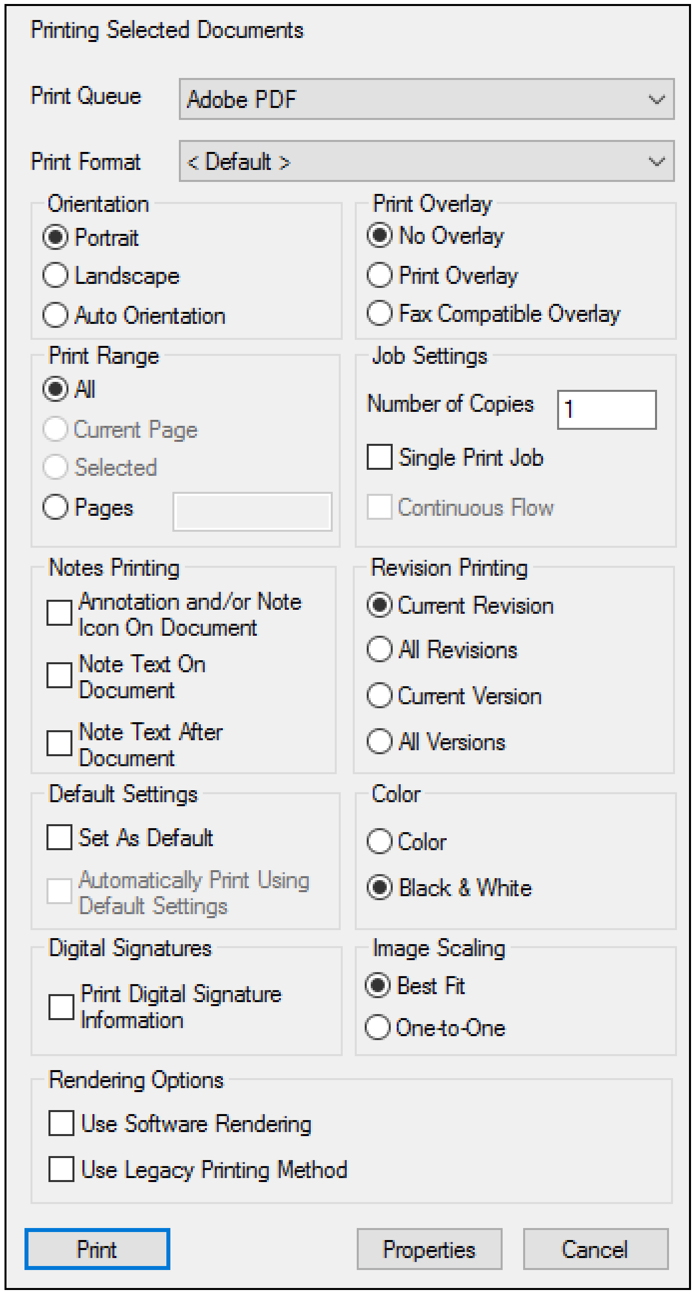
- Documents open with the default XML Style Sheet. If you want to print using an XML Style Sheet other than the default XML Style Sheet, you can select another one from the System Menu Options. (If you have more than one style sheet associated with this document, the default XML Style Sheet is the first one in the list). When you close and re-open the document, it will open with the Default Style Sheet.
- If you want to print only the .xml code (without a style sheet), select **No Style Sheet** from the System Menu Options.

Printing XML Documents with Style Sheet Based on Keyword Type

- With Keyword-Based XML documents, you do not have the option to select a different style sheet, unless you change the Keyword Value whose Keyword Type this document is based upon. If you change this Keyword Value, the document is re-indexed and saved in the system with the new Keyword Value and style sheet.
- If you want to print only the .xml code (without a style sheet) select **No Style Sheet** from the System Menu Options.

Selecting Print Options

The **Print** dialog box presents standard printing options. These options may vary, depending on whether you are printing a single document, multiple documents, or a batch of documents.



Note: The OnBase **Print** dialog box is displayed when the **Print Selected** and **Print All** options are selected from a Document Search Result list's right-click menu. However, the settings in the OnBase **Print** dialog box are not applied to OLE documents. To change the print settings for an OLE document, you must use the OLE document's native **Print** dialog box. Microsoft Word documents behave similarly to other documents in that they respect most applicable print settings (orientation options do not apply to Word documents).

Note: Some documents, such as HTML-based documents, may use the print dialog box associated with Microsoft® Internet Explorer. HTML-based documents will always use the Internet Explorer print dialog box when **Print** is selected from an open document's right-click menu.

Note: HTML-based documents with content rendered wider than a single printed page may be vertically truncated when printing from the **Document Search Results** list right-click menu.

Note: HTML-based documents printed by selecting **Print Selected** from a Document Search Result list's right-click menu may have unexpected print results.

Selecting a Print Queue

Select the desired Workstation Printer or print queue (mapped to the desired printer) from the **Print Queue** drop-down list. The default print queue is set up in the **Print Queue Mapping** tab of the **Workstation Options** dialog box. Click the **Properties** button to open the **Windows Printer Properties** dialog box. This gives the user the ability to modify advanced printer settings for an individual print job.

Note: When printing an Outlook Message (.msg) from within the OnBase Client, the workstation's default printer will be used instead of the printer selected in the client.

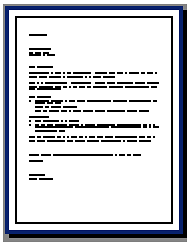
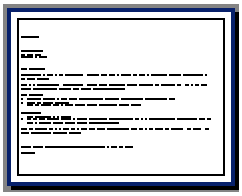
Selecting a Print Format

The **Print Format:** drop-down list displays print formats, which determine the appearance of the selected documents. When you select a print format, its settings are used as defaults for subsequently printed documents of the same Document Type. If a batch is selected, or your system administrator has not associated a print format with the Document Type, the setting is **<Default>**. To override the print format defaults, change the settings in the print dialog box.

When printing multiple items with varying document types, select **<Use Doc Type Default>** from the **Print Format** drop-down list. This selection will allow each document to print using the print format configured for each Document Type.

Orientation Options

Note: Orientation options do not apply to Microsoft Word documents (or other OLE documents).

Print Option	Description
Portrait 	Prints the top of the page on the shortest side of the paper.
Landscape 	Prints the top of the page on the longest side of the paper.
Auto Orientation	Prints the page according to its dimensions. For example, if the height of the page is greater than the width, Portrait will be used. If the width of the page is greater than the height, Landscape will be used.

Print Overlay Options

This section applies to documents that have associated overlays.

Print Option	Description
No Overlay	Prints the document without the associated overlay.
Print Overlay	Prints the document with the associated overlay. The overlay that is printed may be different than the overlay that displays, depending on the Document Type configuration.

Print Option	Description
Fax Compatible	Select this option if you are printing to a fax machine. The system arranges the overlay image in a way that faxing software can properly interpret. The overlay that is faxed may be different than the overlay that displays or printed, depending on how the document type is set up.

Print Range Options

Note: The **Current Page** option is available only for a document currently open in the Document Viewer. The **Selected** option is available only when part of the document currently open in the Document Viewer is selected.

Note: Print range options also apply to Microsoft Word documents and Microsoft Excel spreadsheets.

Print Option	Description
All	Prints the entire document. **Note:** Depending on the file format of the document, you may only be able to select **All** as the Print Range option.
Current Page	Prints the current page. **Note:** The current page is defined as the lowest page number in the viewer, even if the next page is predominantly in the viewer.
Selected	Prints the selected area of the document. **Note:** This option is selected by default, when available. See Selecting Text in Documents on page 84 for information on selecting and printing a section of a text document. See Using the Rubber Band on page 122 for information on selecting and printing a section of an image document.

Print Option	Description
Pages	Prints the specified range of pages. **Note:** If you enter a complex range into this field, the pages will be printed in the order defined by that range. For example, when 1-3, 5, 9 is entered, page 1 of the document is printed first, followed by pages 2, 3, 5, and 9. **Note:** Reverse order printing is not supported.

Notes Printing Options

Note: In order to print notes on OLE documents (such as Microsoft Office documents) from the OnBase Client, the documents must be printed from the **Document Search Results** list. Notes are printed before the document on a separate page.

Print Option	Description
Annotation and/or Note Icon On Document	Prints note icons and annotations (e.g., arrows, ellipses and highlights) on the document. **Note:** If an icon is not configured for the Note Type, then no icon will be printed for these notes. **Note:** Depending on your system's configuration, some note icons may not be printed even if this option is selected. See your system administrator if you have questions.
Note Text On Document	Prints note text and information about each note (e.g. the note's Auto-Name string, the user name of the note's creator and the date and time the note was created) on the document. **Note:** This option is not respected by Overlapped Text annotations.
Note Text After Document	Prints note text and information about each note (e.g. the note type, the note's Auto-Name string, the user name of the note's creator, the date and time the note was created and the location of the note) on a separate page following the document.

Job Settings Options

Print Option	Description
Number of Copies	Enter the number of copies to print.
Single Print Job	If multiple documents are highlighted, **Single Print Job** instructs the system to combine the selected documents into a single Windows print job, rather than printing each separately. **Note:** When using the **Print All** right-click option with HTML documents, you must deselect the **Single Print Job** check box to successfully print the documents.
Continuous Flow	If the multiple documents selected for a Single Print Job are formatted for a multi-image layout on the page, the **Continuous Flow** option tells the system to continue filling the page with images from the next document, filling the existing multi-page format before proceeding to the next page. **Example:** If you select three two-page documents for printing and choose a print format configured to print two rows and two columns, your output would be three pages, each of which is a single document. If you select **Continuous Flow**, your output would be two pages, the first page having two documents and the second page having the remaining third document. **Note:** Continuous Flow cannot be used to control the format of PCL documents in a multi-image layout.

Revision Printing Options

These options are only available if your database is licensed for EDM Services. For information about these options, see the EDM Services documentation.

Default Settings

Print Option	Description
Set as Default	Select this option to use the settings that you have selected in this dialog box as the default print settings. The settings will remain selected as long as this check box is selected. If a setting is changed, or if the check box is deselected, the settings will remain selected until the user changes them, prints or cancels out of the Print dialog box. **Note:** If the **Print Range** option **Selected** is used in the **Set as Default** setting, a document printed with no section selected will default to the **All** Print Range option because **Selected** is no longer available.
Automatically Print Using Default Settings	This option becomes activated only if the **Set as Default** check box is selected and if the **Print Range** is set to **All** or a **Page Range**. When this option is selected, you will not see a **Print** dialog box displayed when you select **File | Print**. The document to be printed is automatically printed using the current default print settings selected in the **Print** dialog box. **Note:** When this option is selected, the sub-menu **Auto Print** is added to the **File** menu. Toggle **File | Auto Print** to select/deselect this option in the **Print Dialog** box.

Color Options

Note: Depending on your installed print drivers, these options may not be respected with certain printers.

Print Option	Description
Color	Prints the document in color.
Black and White	Prints the document in black and white.

Image Scaling Options

Print Option	Description
Best Fit	Prints image to fit on a single page, with scaling as necessary.

Print Option	Description
One-to-One	Prints image actual size/scale (1:1 in terms of inches).

Digital Signatures Options

Print Option	Description
Print Digital Signature Information	Select this radio button to set the print format to print Digital Signature Information after a document by default. See the Digital Signatures documentation for more information about this option.

Rendering Options

Print Option	Description
Use Software Rendering	Select this option when a document with an overlay is being printed to a PDF virtual printer. When this option is not selected, and a document with an overlay is printed to a PDF virtual printer, the overlay may obstruct the original document on the printout. **Note:** Selecting the **Use Software Rendering** option may cause the print job to take longer than expected. To reduce print time, modify the print quality settings (for example, by printing in black and white or lowering the printer DPI).
Use Legacy Printing Method	Select this option to use a previous rendering engine when the current rendering engine produces unexpected printer output.

Printing Multiple Documents

If you select multiple documents to print, you should also select **<Use Doc Type Default>** from the Print Format drop-down list. This selection will print each document based on the document types print format.

Navigating the Print Queues Window

The **Print Queues** window provides the ability to drag documents to the right side of the window to be queued for printing, and also displays the status of jobs submitted to the network print queue.

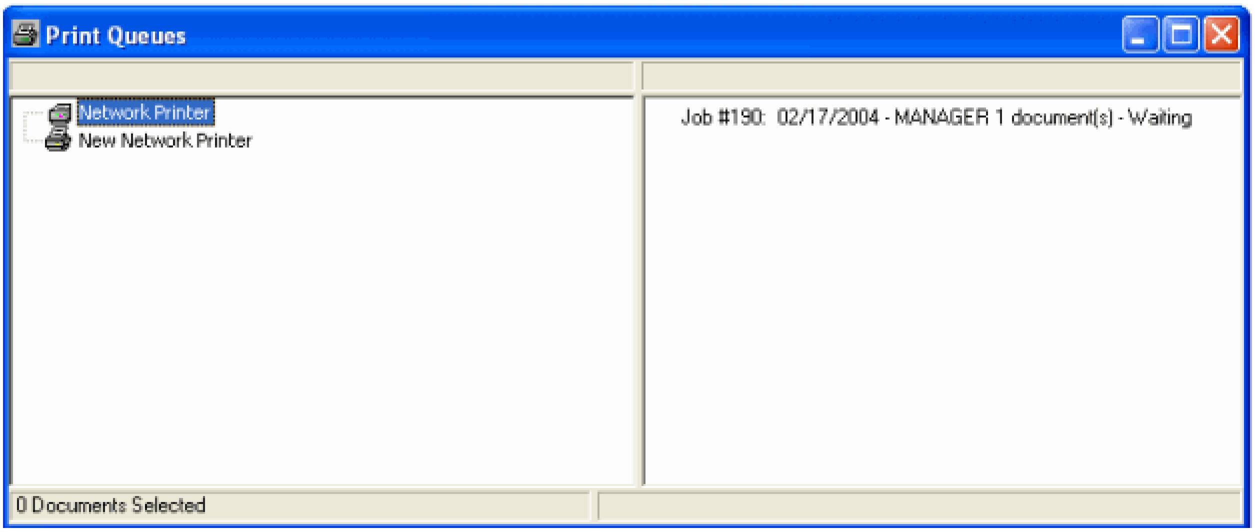
Note: HTML-based documents printed from the network print queue may have unexpected print results.

To open the Print Queues window, select **User | Print Queue** from the OnBase Client module.

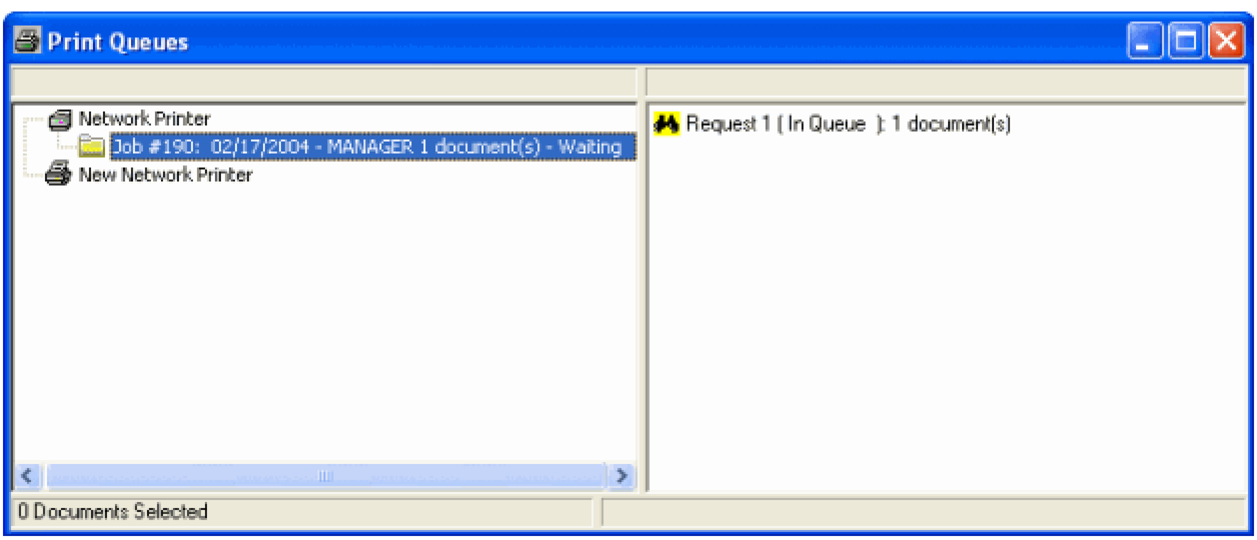
The window is split vertically. The left side lists the print queues to which you have access. As you select different queues, the right side of the window displays print jobs that have been submitted to that print queue.

Navigating a Network Print Queue

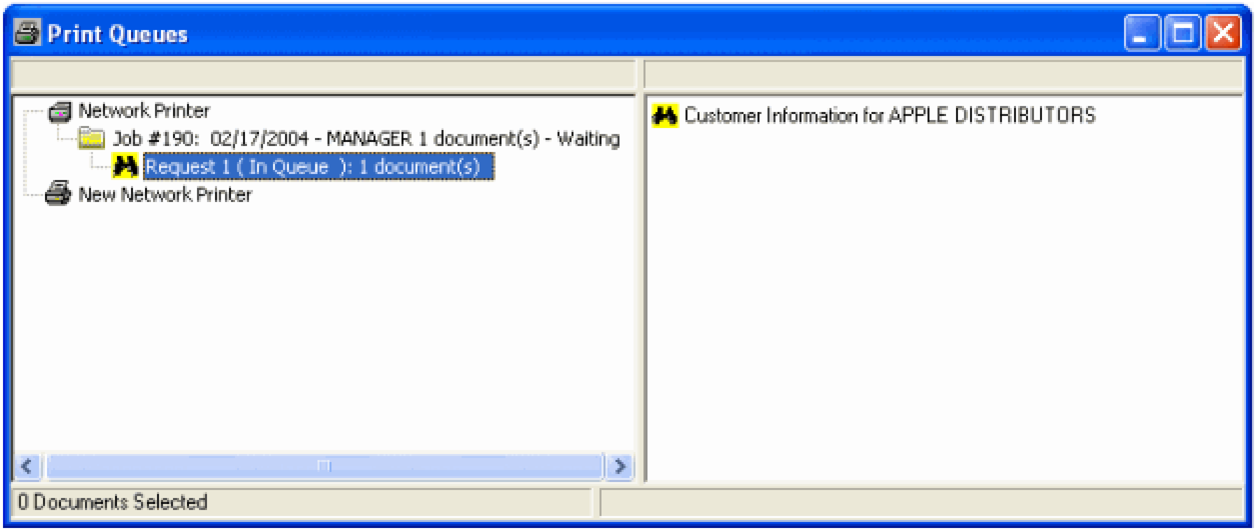
When a network print queue is selected on the left side of the window, the right side of the window displays print jobs waiting to be printed.



Double-click on the job to see a list of requests contained within that job. A print job is broken into a number of requests equal to the number of documents in the job divided by 30.



Double-click on the request to view a list of documents contained in the request.



Right-click menu options allow you to do additional work on the document.

Setting the Status of a Print Job

The print status of a print job is listed after the name of the job. The status of a print job can be one of the following:

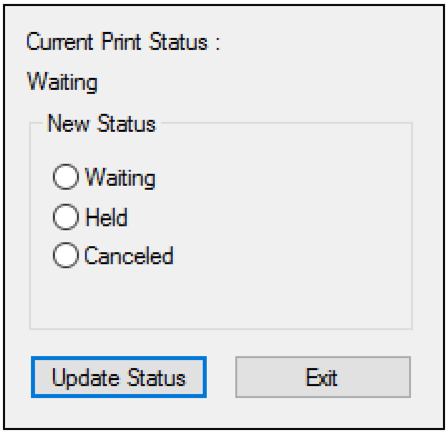
- **Waiting** - The job is waiting to be printed.
- **Held** - The job is held and not printed. It remains in the print queue until its status is changed.
- **Canceled** - The job is not printed.

To change the status of a print job:

1. Select a print job in the right pane of the **Print Queues** window.
2. Right-click on the job and select **Set Status**.

   To change the status of the entire job, including all requests within the job, select **Set Status for Whole Job**.

   The **Set Print Status** dialog box is displayed:

   The **Current Print Status** displays the current status of the selected print job.
3. Select a status in the **New Status** section.
4. Click **Update Status**.

Setting the Status of a Request

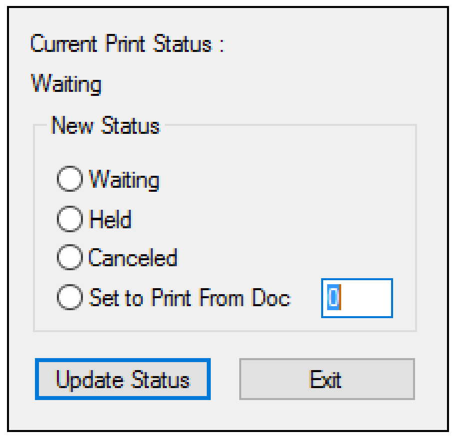
The status of requests within a print job are listed in parentheses after the request number. The status options for a request are the same as those for a print job with the addition of a **Set to Print From Doc** option. This option allows you to specify the first document in the series to be printed, followed by all subsequent documents. When the value of **Set to Print From Doc** is set to **0**, all the documents in the request are printed. There is a maximum of 30 documents in a request.

To change the status of a request:

1. Select one or more requests from the right pane of the **Print Queues** window.
2. Right-click on the selected requests and select **Set Status**.

   To change the status of the entire job in which the request resides, including all requests within the job, select **Set Status for Whole Job**.

   The **Set Print Status** dialog box is displayed:

   The **Current Print Status** displays the current status of the selected request.
3. Select a status in the **New Status** section.
4. If **Set to Print From Doc** is selected, enter the list placement number of the document to print first, followed by all subsequent documents. Set the value of **Set to Print From Doc** to **0** to print all documents in the request.
5. Click **Update Status**.

Dragging-and-Dropping Documents into a Print Queue

1. Open the **Print Queues** window by selecting **User | Print Queue**.
2. Select the print queue from the left side of the **Print Queues** window.
3. Drag the documents to the right side of the **Print Queues** window. When you drop the documents on the right side of the window, a **Print** dialog box appears. Enter the necessary fields in the **Print** dialog box, and click **Print**.

Note: Your document may be set up to display in the system one way, and to print another way. See your system administrator if you get unexpected printing results.

Creating Renditions of a Document

Rendition

A **Rendition** is a version of an original document that is saved in a different file format. For example, a searchable text document version of an image document is a rendition.

Viewing Renditions

From an open document (or from an unopened document in a Document Search Results list), right click on the document and select **Document | Revisions / Renditions**. Select the available rendition and click **OK**. When you print from an open document, the document rendition that is currently displayed is printed.

Creating Renditions

Renditions can be created using optional modules. It is also possible to create a rendition by importing a document through the **Import** dialog box. This option is available if the existing document and the newly imported document have identical Document Types and keyword values, but use different file formats. When this occurs, the **Document Revisions** dialog box is displayed. Select the appropriate existing document for which you want to create a rendition and click **Save as Rendition**.

Note: The **Document Revisions** dialog box may be displayed and contain additional options if the Document Type is revisable, regardless of the file formats for the incoming and existing documents. For more information on revisable Document Types and revisions, see the EDM Services module reference guide.

Applying Overlays to Documents

An overlay is an image document that can be displayed on top of a text or image document. For example, a text document that contains purchase order information might use an image of a purchase order form as an overlay.

Overlays

The following example shows a document displayed with an overlay.

PURCHASE ORDER

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

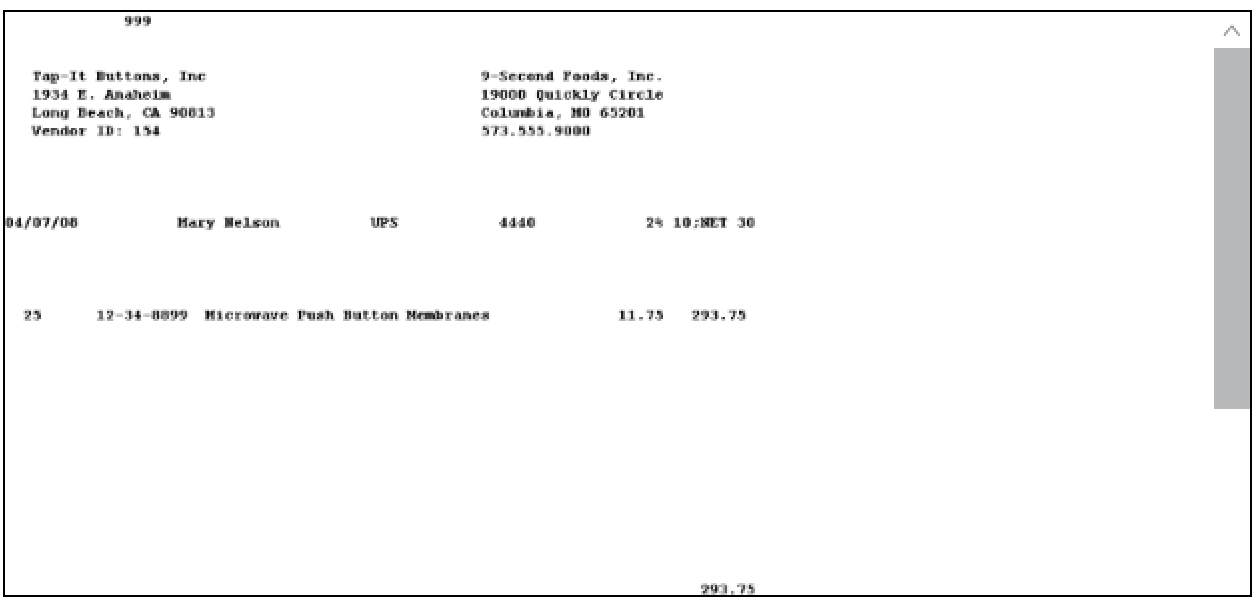
The following number must appear on all related correspondence, shipping papers, and invoices:
P.O. NUMBER 999

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

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

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

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



999

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

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

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

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

293.75

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

Applying Overlays

If a text document has an overlay, the **View Overlay** toolbar button is active at the top of the viewing window.

To display the overlay:

- Select the **View Overlay** toolbar button from the Client Toolbar.
- Press **Ctrl-O**.
- Select **Overlay** from the right-click menu or **Document** menu.

Removing an Overlay from a Document

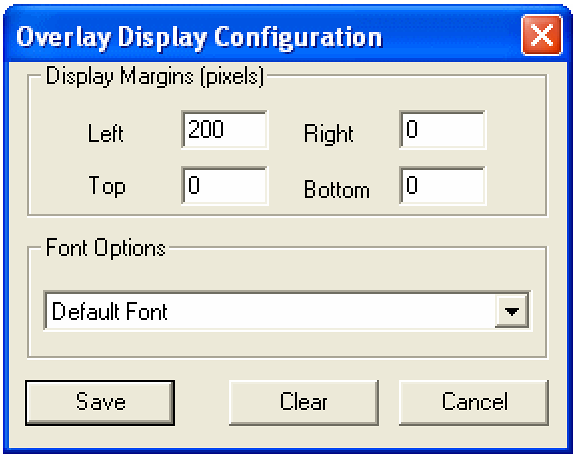
To remove an overlay from a document:

- Click the **View Overlay** toolbar button from the Client Toolbar.
- Press **Ctrl-O**.
- Select **Text Window** from the right-click menu, from the **Document** menu, or press **Ctrl-T**.

Viewing Overlay Settings

To view an overlay's settings:

1. Right-click and select **Overlay Settings**.
2. The **Overlay Display Configuration** dialog box is displayed:



3. Configure the position of the overlay and which font to use.
4. Click **Save** to save the settings and close the **Overlay Display Configuration** dialog box.

Note: While you are viewing the overlay, the overlay right-click menu is active. To return to text-specific right-click options, disable the overlay.

Separating Image Documents

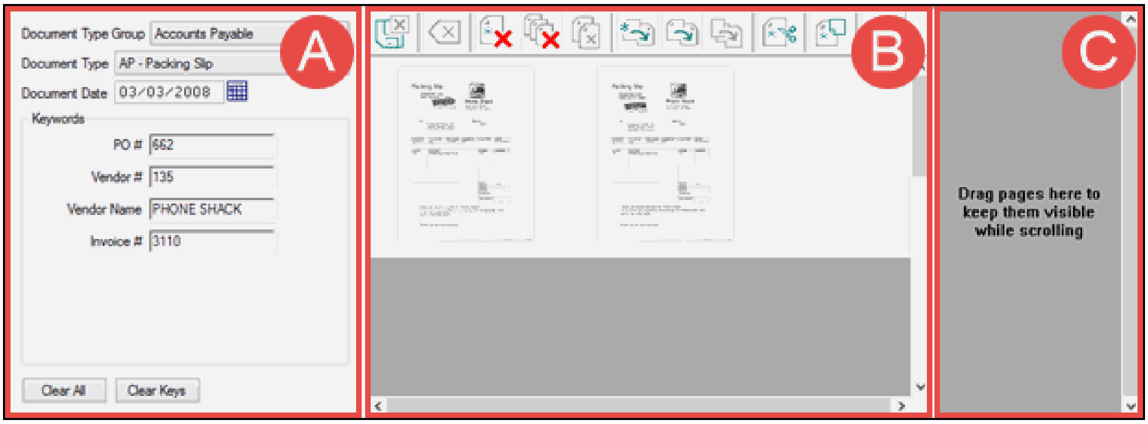
Image documents can be separated into multiple new documents using the Document Separation window. This window can be opened from the following dialog boxes or windows in the OnBase Client:

- The **Import Document** dialog box, by clicking the **Split** button
- The **Re-Index Document** dialog box, by clicking the **Split** button
- The **Document Search Results** list, by right-clicking and selecting **Send To | Document Editor**

Note: Accessing **Re-Index Document | Split** and **Send To | Document Editor** is not supported for documents stored in S3 Disk Groups.

Documents are split and indexed in the Document Separation window. The Document Separation window consists of these three sections:

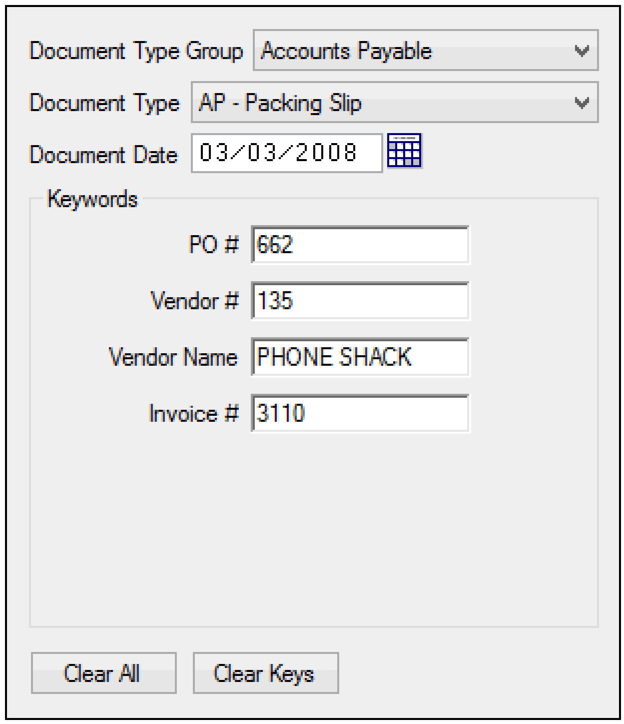
- The Keyword Panel
- The Separation Workspace
- The Holding Area



The Keyword Panel

Document and Keyword Type fields are displayed in the Keyword Panel of the Document Separation window. These fields are used to index the newly-created documents that are created from the original document.

Note: Depending on your system's configuration, one or more Keyword Values may be displayed as read-only and/or a masked value.



Item	Description
Document Type Group	This drop-down is used to select the Document Type Group of the currently-selected document.
Document Type	This drop-down is used to select the Document Type of the currently-selected document.
Document Date	This field is used to determine the Document Date of the currently-selected document. Click the calendar icon to display a calendar from which the date can be selected.
Keyword Types	The Keyword Type fields are displayed once a Document Type has been selected from the Document Type drop-down. Use the keyboard or the mouse to enter data into these fields.

Indexing information from the original document automatically populates fields in the Keyword Panel of new documents created from the original document. If necessary, this data can be modified or removed.

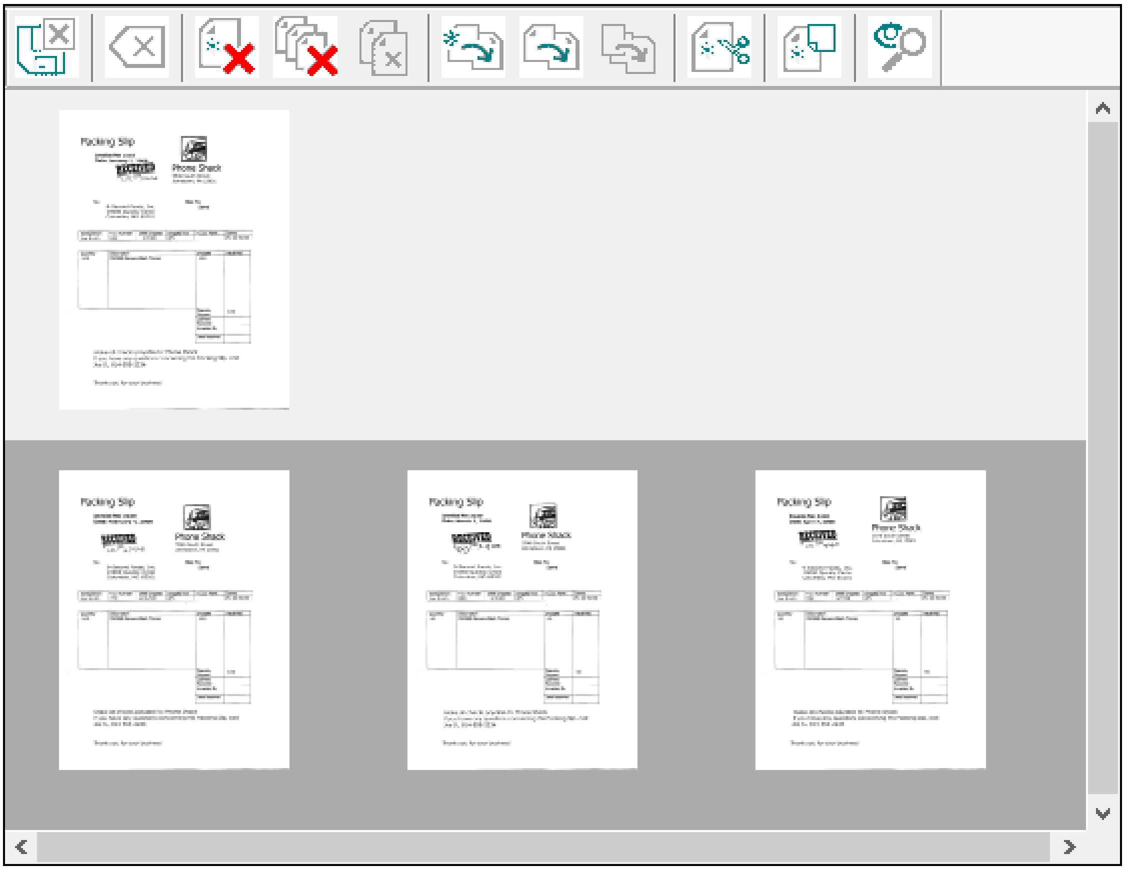
Note: Keyword Values are only applied to the newly-created document(s) if the Keyword Type is associated with the new document's Document Type.

The Separation Workspace

Each document is displayed in a separate row of the Separation Workspace. When changes made in the Separation Workspace are saved, a new document is created for the contents of each row. Depending on your system's configuration, you may be given the option to send the original document(s) to the trash can.

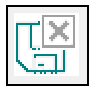
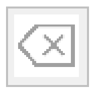
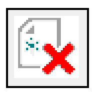
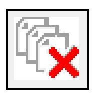
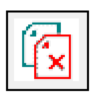
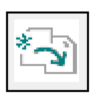
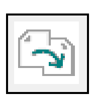
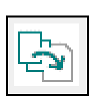
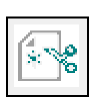
The individual pages of each document are displayed as thumbnail images. If the document contains more pages than the number of thumbnails that can be displayed in the window, the number of pages remaining in the document is displayed in the window.

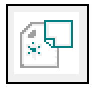
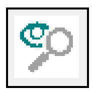
To see a page in greater detail, hold the pointer over it to zoom in on it.



The Separation Workspace Toolbar

The Separation Workspace toolbar is located at the top of the Separation Workspace.

Button Name	Button	Description
Save and Close		Click to save all documents in the Separation Workspace to OnBase and close the Document Separation window.
Cancel		Click to close the Document Separation window without saving any documents to OnBase.
Toggle Delete		Click to mark the selected page or the page located before the marker to be deleted.
Delete Document		Click to mark the currently selected document to be deleted.
Toggle Delete Selected		Click to mark all currently selected pages to be deleted.
Copy Page		Click to copy the currently selected page. The duplicate page is added after the existing page.
Copy Document		Click to copy the currently selected document. The duplicate document is added after the existing document.
Copy Selected		Click to copy the currently selected pages. These pages are added to the Document Separation window as a new document.
Break/Unbreak		Click to separate the current document at the location of the marker. All pages located before the marker will remain part of the current document, and all pages after the marker will become a new document. If the marker is located at the end of the current document, clicking the **Break/Unbreak** button appends the next document to the end of the current document. If the current document is the last document in the Document Separation window, then nothing is appended to the current document.

Button Name	Button	Description
Add Note		Click to add a note to the selected page of the current document. When adding notes to a page, a larger image of the page is opened in the Document Page Viewer window. When finished adding a note to the page, close the Document Page Viewer window. The text and position of the note is automatically saved. The number of notes on the page is displayed below the thumbnail image of the page in the Separation workspace.
Set Thumbnail Sizes		Click to display the **Thumbnail Sizes** dialog box.

Right-Click Menu Options

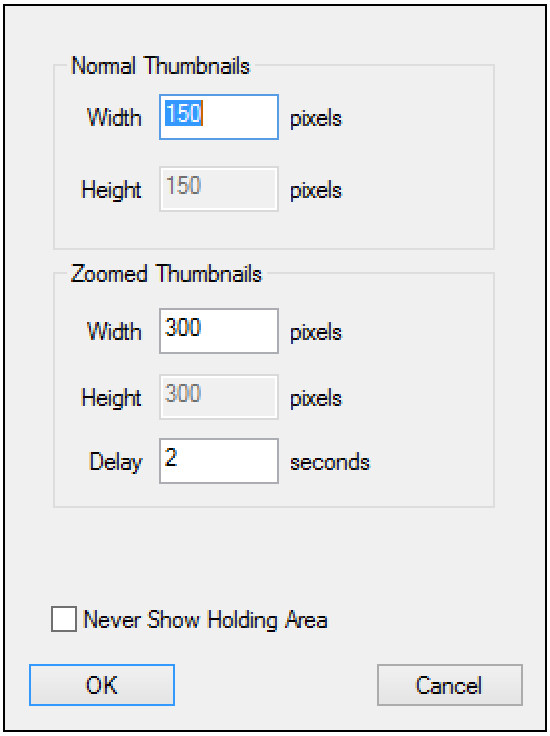
The following right-click menu options are available when a document is selected in the Document Separation window:

Option	Description
Delete Current Page	Select to mark the selected page or the page located before the marker to be deleted.
Delete Current Document	Select to mark the selected document to be deleted.
Delete Selected Pages	Select to mark all currently selected pages to be deleted.
Copy Current Page	Select to copy the currently selected page. The duplicate page is added after the existing page.
Copy Current Document	Select to copy the currently selected document. The duplicate document is added after the existing document.
Copy Selected Pages	Select to copy the currently selected pages. These pages are added to the Document Separation window as a new document.
Rotate	Select to rotate the selected page, the selected document or the selected group of pages 90 degrees to the left or right.

Option	Description
Break/Unbreak Current Position	Select to separate the current document at the location of the marker. All pages located before the marker will remain part of the current document, and all pages after the marker will become a new document. If the marker is located at the end of the current document, clicking the **Break/Unbreak** button appends the next document to the end of the current document. If the current document is the last document in the Document Separation window, then nothing is appended to the current document.
Notes	Select **Add Note to Current Page**, or if a note already exists on the page, **Notes | Add Note to Current Page**, to add a note to the selected page of the current document. Select **Notes | View Notes** to view all notes that you have rights to that have been placed on the selected page of the current document. When adding or viewing notes to a page, a larger image of the page is opened in the Document Page Viewer window. When finished viewing or adding a note to the page, close the Document Page Viewer window. The text and position of the note is automatically saved. The number of notes on the page is displayed below the thumbnail image of the page in the Separation workspace.
Thumbnail Sizes...	Select to display the **Thumbnail Sizes** dialog box.
Save and Close	Select to save all documents in the Separation Workspace to OnBase and close the Document Separation window.
Cancel and Close	Select to close the Document Separation window without saving any documents to OnBase.

The Thumbnail Sizes Dialog Box

All configuration of the thumbnails that represent the pages of the document is done in the **Thumbnail Sizes** dialog box.



Item	Description
Normal Thumbnails	Enter the width and height, in pixels, of the thumbnails that represent the pages of the document(s).
Zoomed Thumbnails	Enter the width and height, in pixels, of the enlarged version of the thumbnail images that represent the pages of the document(s). In the **Delay** field, enter the number of seconds that the pointer needs to hover over a thumbnail before the enlarged thumbnail image is displayed.
Never Show Holding Area	Select the **Never Show Holding Area** to always prevent the Holding Area from being displayed as part of the Document Separation window.

The Holding Area

If the original document consists of several pages and all of the thumbnail images cannot be displayed at once, you may use the Holding Area to temporarily hold images while you use the scroll bars to move to another part of the document.

Thumbnails of pages that have been moved to the Holding Area are displayed, but dimmed, in the Separation Workspace to indicate that the page is currently in the Holding Area.

Note: Depending on your system's configuration, the Holding Area may not be displayed.

Separating a Document

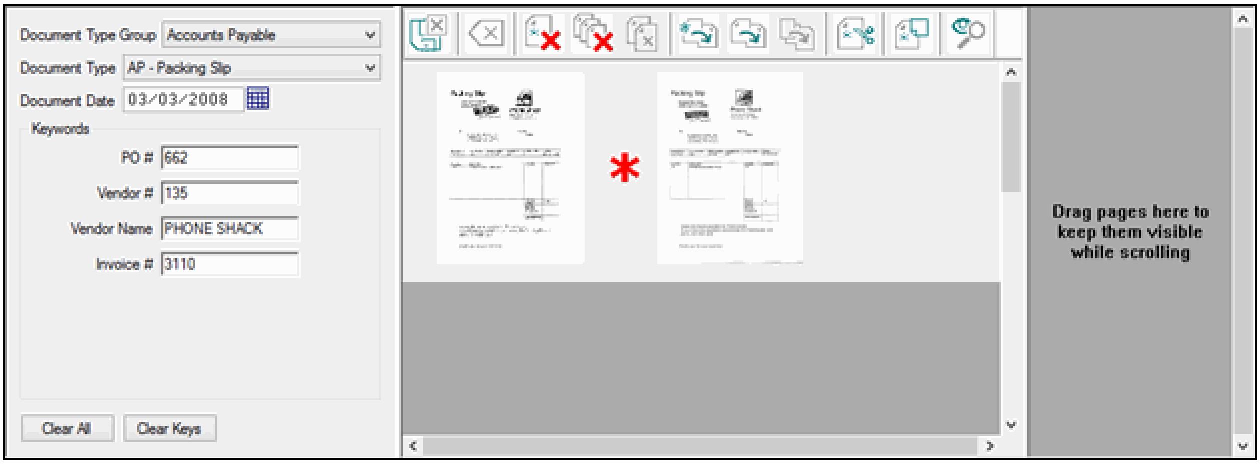
Once a document is displayed in the Document Separation window, it can be separated into multiple new documents of any Document Type to which you have rights, and then indexed. The new documents are immediately available to all users logged onto OnBase.

Separating the Original Document into New Documents

One or more pages of the original document can be used to create new, unique documents.

To separate one or more documents into multiple documents:

1. Open the document(s) to be separated in the Document Separation window.



2. The individual pages of all of the selected documents are displayed as thumbnail images. If the document contains more pages than the number of thumbnails that can be displayed in the window, the number of pages remaining in the document is displayed in the window.

   To see a page in greater detail, hold the pointer over it to zoom in on it.

   You can take the following action on each thumbnail image:

   - To copy a single page, select the page and click the **Copy Page** toolbar button or the **Copy Current Page** right-click menu option.

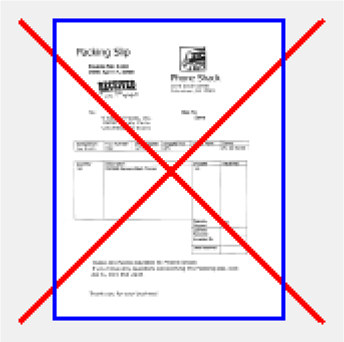
     To copy multiple pages, select the pages and click the **Copy Selected** toolbar button or the **Copy Selected Pages** right-click menu option.

     To copy an entire document, select the document and click the **Copy Document** toolbar button or **Copy Current Document** right-click menu option.

- Delete a page or pages from the document by double-clicking it; by clicking the **Toggle Delete** (for a single selected page) or **Toggle Delete Selected** (for multiple pages) toolbar buttons; or by clicking the **Delete Current Page** (for a single page) or **Delete Selected Pages** (for multiple pages) right-click menu option.

  To delete the selected document, click the **Delete Document** toolbar button or the **Delete Current Document** right-click menu option.

  Pages marked to be deleted are displayed with a red **X** through them.

  To return pages to the document, double-click the thumbnail again, click the Toggle Delete toolbar button or click the Delete Selected Pages right-click menu option. The red **X** will be removed from the pages.

3. Create a new document or modify an existing document displayed in the Document Separation window in one or more of the following ways:
   - Drag-and-drop thumbnails within existing documents to re-order pages in a document or to move pages to different document. A blue bar shows the location in the document where the page will be placed. Drag and drop the image(s) into a new row to create a new document.

     If the document consists of too many pages to be displayed at once in the Separation Workspace, you may drag and drop thumbnails in the Holding Area temporarily to hold the images while you navigate to another part of the document.

Note: Depending on your system's configuration, the Holding Area may or may not be displayed.

- Double-click between two thumbnail images to separate the document into two documents at that point. All pages located before the location you double-clicked remain part of the original document. All pages located after the location you double-clicked now compose a new document.

- Place the marker, a red asterisk (*), between two thumbnail images and click the **Break/Unbreak** toolbar button or the **Break/Unbreak Current Position** right-click menu option.

  All pages located before the marker remain part of the original document. All pages located after the marker now compose a new document.

  If the marker is located at the end of the current document, clicking the **Break/ Unbreak** toolbar button or the **Break/Unbreak Current Position** right-click menu option appends the next document to the end of the current document. If the current document is the last document in the Document Separation window, then nothing is appended to the current document.

Any thumbnail images you move to a new row comprise a new document. Each row of thumbnail images represents a unique document.

4. Repeat steps 2 and 3 to create as many documents as needed.

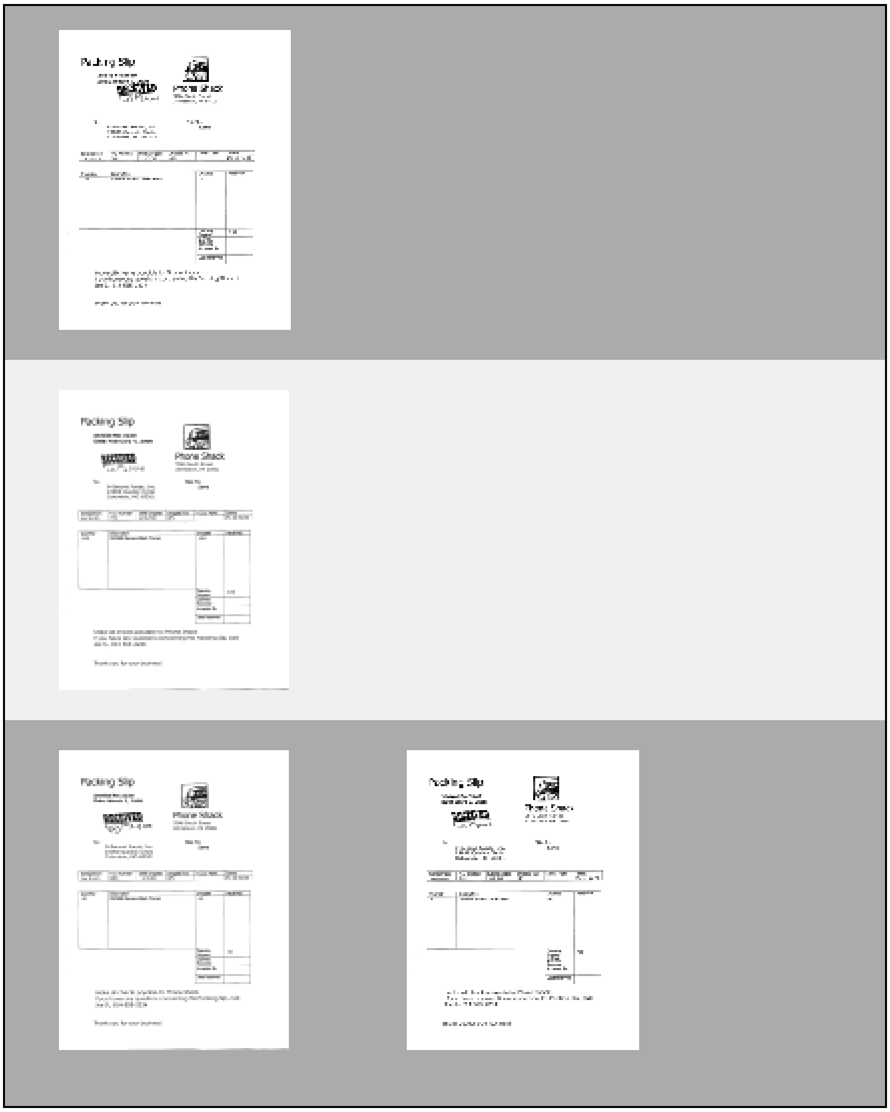
Indexing the Newly Created Documents

Once you have separated the original document(s) into new, unique document(s), each of these documents must be indexed.

To index the newly created unique documents:

1. Select a document in the Separation Workspace. Each unique document consists of a row of thumbnails; each thumbnail represents one page of the document.

   The selected document is highlighted in the Separation Workspace. In the example below, the second document in the Separation Workspace is selected.



2. Use the Keyword Panel to select the Document Type Group, Document Type and Document Date of the selected document.

   These fields are automatically populated with the values of the document from which the currently-selected document was created.

   For example, if the current document was created with pages from the original document, then the Keyword Panel would be populated with the Document Type Group, Document Type and Document Date of the original document. If the current document was created from pages from another new document, the current document would inherit the indexing information from that document.

   This automatically-populated indexing information may be modified or discarded.
3. Once a Document Type is selected, Keyword Type fields are displayed in the Keyword Panel.

   If the Document Type of the current document is associated with Keyword Types that were associated with the document from which the current document was created, then the current document inherits those Keyword Values from the document from which it was created. This automatically-populated indexing information may be modified or discarded.

   Use the keyboard and/or mouse to modify the automatically-populated fields or to enter values into empty fields. Depending on your configuration, documents may be indexed with the aid of AutoFill Keyword Type Groups, Keyword Type Groups, Multi-Instance Keyword Type Groups, Keyword Data Sets, and/or Cascading Data Sets.
4. Click **Clear Keys** to clear all values entered in the Keyword Type field(s). Click **Clear All** to clear all fields in the Keyword Panel for the selected document.
5. Repeat steps 1-4 for each document in the Separation Workspace.
6. Once each document has been indexed, click **Save and Close** to save all documents to OnBase and close the Document Separation window.

   A confirmation dialog box is displayed, warning you that the changes to the document(s) cannot be undone. Click **Yes** to continue, or click **No** to return to the Document Separation window.

   A message is displayed asking you if you would like to delete the original document(s). Click **Yes** to delete the document, click **No** to keep it.

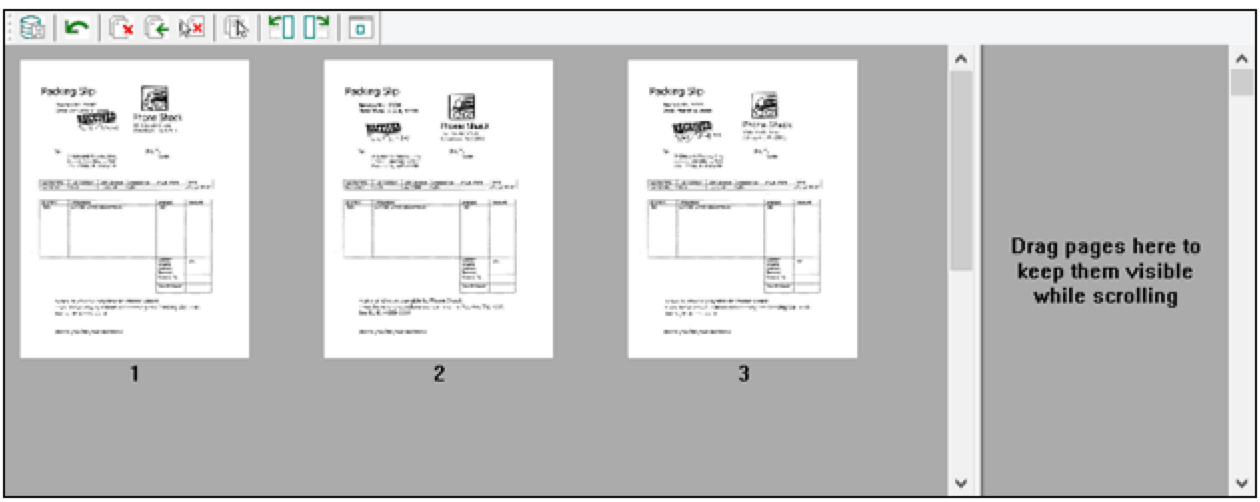
Deleting and Reordering Pages

The **Delete/Reorder Pages** option provides you with the ability to remove or reorder the pages of a document while displaying all pages in thumbnail view.

Note: Suppressed pages are displayed in this view (i.e., you may see pages that weren't previously being displayed in the Document Viewer). For more information on suppressed pages, see your system administrator.

1. Retrieve and open an image document and right-click on it.
2. Select **Delete/Reorder Pages** and a new window displays that shows the thumbnail view of all pages in the document. Each page is numbered.

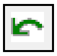
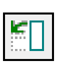
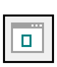
Note: If the window cannot display the thumbnail images of all pages in the document, a holding area is created on the right side of the window to hold thumbnails you are working with while you scroll to other locations in the document.



Delete/Reorder Pages Toolbar

The following toolbar buttons are available:

Toolbar Button	Description
	**Save changes and close** - Saves changes and returns to the open image document. **Caution:** You cannot recover deleted pages after clicking this button.

Toolbar Button	Description
	**Cancel changes** - Undoes changes made to the document. **Note:** You cannot cancel a command to delete pages after you click the **Save changes and close** button.
	**Mark delete all** - Selects and marks all pages for deletion. **Note:** Although the **Mark delete all** button selects all pages in a document for deletion, the system will not permit deleting an entire document from this view. The **Mark delete all** button allows you to select all the pages for deletion, and then to deselect those to keep. To delete the entire document, use the **Document Retrieval** dialog box Trash Can.
	**Undelete all** - Undeletes all pages marked for deletion and deselects all pages.
	**Delete selected** - Marks the selected pages for deletion.
	**Select all** - Selects all pages.
	**Rotate selected 90° left** - Rotates the selected page(s) 90° to the left.
	**Rotate selected 90° right** - Rotates the selected page(s) 90° to the right.
	**Set thumbnail sizes** - Displays the **Thumbnail Sizes** dialog box. • Use the **Width** setting to set dimensions for both normal and zoomed thumbnails. The **Height** setting will automatically adjust. • Use the **Delay** field to specify how long it should take zoomed thumbnail images to display. The default is 2 seconds, and times as fast as 0.1 second can be specified. Times specified that are faster than 0.1 second will default to 2 seconds. • Select **Never Show Holding Area** to prevent the holding area from displaying. If this option is not selected, the holding area is displayed automatically when the **Delete/Reorder Pages** window cannot display all of a document's pages simultaneously.

Holding Area

If the Delete/Reorder Pages window cannot display all a document's pages simultaneously, a holding area displays on the right side of the window. You can click and drag pages to the holding area to keep the pages visible as you scroll through the rest of the document.

You can use the holding area as you reorder, delete, and rotate pages. If you delete or rotate a page that is displayed in the holding area, the change is reflected in both the holding area and the main display area.

For information about using the holding area to reorder pages, see Moving Pages in a Larger Document.

Delete a Page or Pages

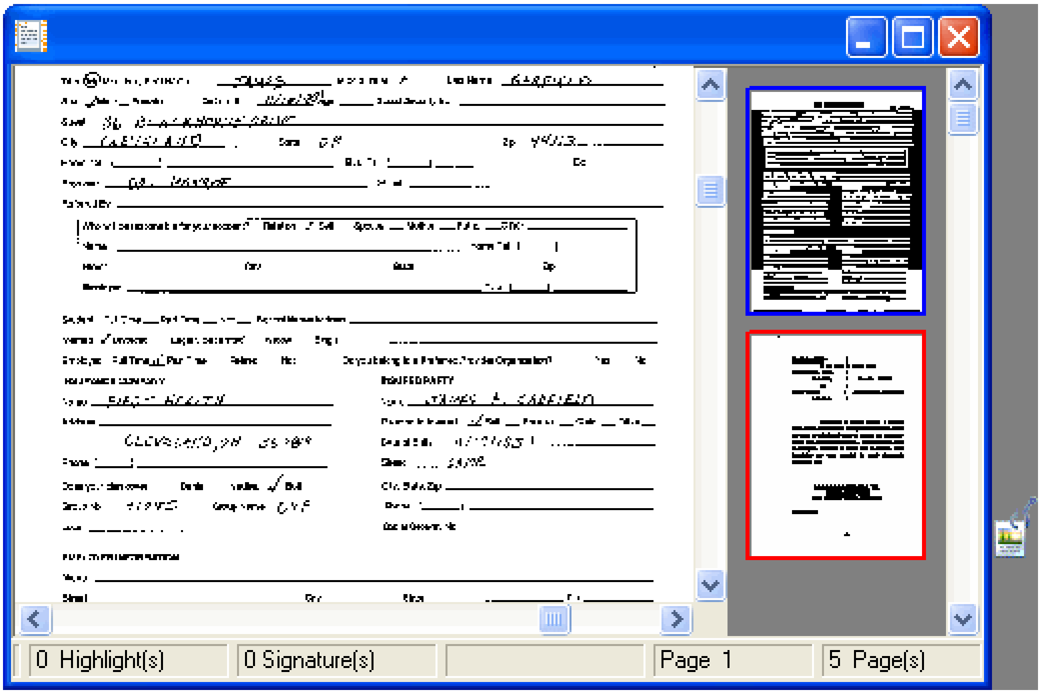
There are two ways to delete a page of a current image document:

- Double-click a thumbnail to select the page for deletion (a red X indicates it is selected for deletion.) Repeat for every page you wish to delete. If your document has many pages, you can also select the **Mark delete all** button to select all pages and then deselect the ones you want to keep by double-clicking the thumbnail(s).

Note: Although the **Mark delete all** button selects all pages in a document for deletion, the system will not permit deleting an entire document from this view. You must delete documents by sending them to the Trash Can.

Click the **Save Changes and Close** button or press **Ctrl + S**. The system prompts **Are you sure you want to save changes to this document?** Click **Yes** to accept changes.

- Right-click and drag the desired thumbnail to the system desktop, as shown in this example. The system prompts **Do you wish to create a new document from this page?** Select **No**.



If working with a multi-page document, the system prompts you with **Are you sure you wish to delete this page?** When working with a single page document, the system prompts you with **Deleting this page will delete the entire document, continue?** Select **Yes** to delete the page.

Caution: Ensure you are satisfied with changes before clicking the **Save Changes and Close** button. Once you have deleted pages and accepted them by clicking the **Save changes and close** button, you cannot recover them.

Reorder Pages

From an open image document, right-click in the viewer window (not the thumbnail window) and select **Delete/Reorder Pages** from the right-click menu. The **Delete/Reorder Pages** window displays a thumbnail view of all pages in the document. Each page is numbered for easy identification.

Moving Pages in a Smaller Document

This method works best with smaller documents with low page counts.

Right-click on the thumbnail you wish to move and drag it to a new position within the thumbnail window. The document page number changes to reflect the new page position, relative to the other thumbnails.

Moving Pages in a Larger Document

Either of the following methods is recommended when moving pages in large documents with high page counts.

- Right-click in the main document window (not the thumbnail window) or on the status bar on the page you wish to move and select **Navigate | Set Page Number**.

  Enter the new page number for the selected page.
- To see all pages in the document at once, right-click in the main window (not the thumbnail window) and select **Delete/Reorder Pages** from the right-click menu. The **Delete/Reorder Pages** window displays a thumbnail view of all pages in the document. Each page is numbered for easy identification.

  Click on a thumbnail to select the page you wish to move (a blue highlight indicates it is selected). Drag it to the desired position in the document and drop it. Notice that the thumbnail retains its original number in the new order - it will retain this number until you save the change.

  Click the **Save Changes and Close** button or press **Ctrl + S** to accept changes. The thumbnails will re-number according to their new order.
- If you cannot see all pages in the document in the **Delete/Reorder Pages** window, you can click and drag the page(s) you want to move to the holding area. Scroll through the document to the new position for the page(s). Click and drag the page(s) from the holding area to the new position. Notice that the thumbnail retains its original number in the new order - it will retain this number until you save the change.

  Click the **Save Changes and Close** button or press **Ctrl + S** to accept changes. The thumbnails will renumber according to their new order.

Rotate Pages

1. From an open image document, right-click in the viewer window (not the thumbnail window) and select **Delete/Reorder Pages** from the right-click menu. The **Delete/ Reorder Pages** window displays a thumbnail view of all pages in the document.
2. Click on the thumbnail(s) to select the page(s) to rotate (a blue highlight indicates it is selected).
3. Click either the **Rotate 90° left** button or the **Rotate 90° right** button.
4. Repeat for all pages you wish to rotate, then click the **Save changes and close** button or press **Ctrl + S** to accept changes.

Deleting Documents

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

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

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

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

Deleting an Open Document

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

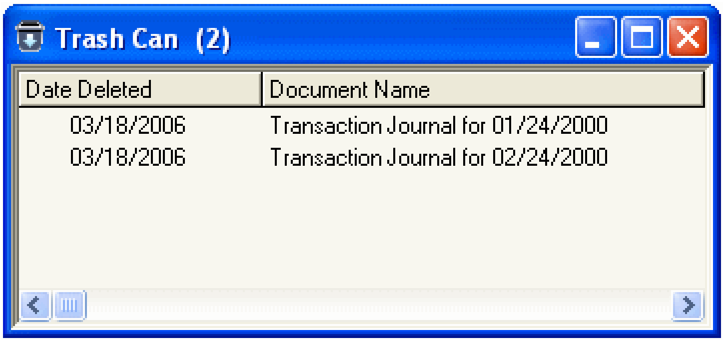
Note: This option is inactive if the document is locked by another user.

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

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

Accessing the Trash Can

The Trash Can contains documents that you have deleted from the system. You can access the Trash Can by selecting **User | Trash Can** or by pressing the **Open Trash Can** button on the toolbar. You may or may not have access to the Trash Can, depending on your system's configuration.



- You can only see documents that you have deleted in the Trash Can.
- The total number of documents in the Trash Can appears in parentheses.
- Documents in the **Trash Can** are removed from the system, but are recoverable by the user who deleted them, or the system administrator.

Minimizing the Trash Can

When you minimize the Trash Can, it becomes a trash can icon on your Client's desktop. Once minimized, you may drag and drop documents into the Trash Can.

Drag and Drop Documents into the Trash Can

Right-click on a document from the Document Search Results list and drag it to your Trash Can desktop icon.

Sort Items in the Trash Can

Click on the column headers to sort documents in the **Trash Can** window.

Undelete / Restore Documents from the Trash Can

Select the document in the trash can window, right-click and choose **Undelete Selected**.

Refresh Document List Windows After Deleting or Restoring

If the **Trash Can** document list does not appear to reflect restored or deleted documents, close the **Trash Can** window and reopen it to update the contents of the list.

View Attributes of Documents in the Trash Can

Viewing attributes is helpful if you want to confirm that the document should be in the Trash Can. You may or may not have access to document attribute information, depending on your system's configuration. Viewable attributes are as follows:

Document History

- Select the document in the Trash Can list, or from the open document and click the **View Document History** toolbar button, or
- Right-click on the document in the Trash Can list, or open the document and select **History**.

Document Properties

- Select the document in the **Trash Can** list, or open the document, right-click and select **Properties**.
- Select the document in the **Trash Can** list, or open the document and select **Document | Properties**.

Revisions / Renditions

- Select the document in the **Trash Can** list, or open the document, right-click and select **Revisions / Renditions**, or
- Open the document from the **Trash Can** list and select **Document | Revisions / Renditions**.

Document Keywords

- Select the document in the **Trash Can** list, or open the document, right-click and select **Keywords**.
- Select the document in the **Trash Can** list, or open the document and select **Document | Keywords**.
- Select the document in the **Trash Can** list, or open the document and click the **View or Modify Keywords** toolbar button. Depending on your system configuration, this toolbar button may or may not be displayed on your workstation.

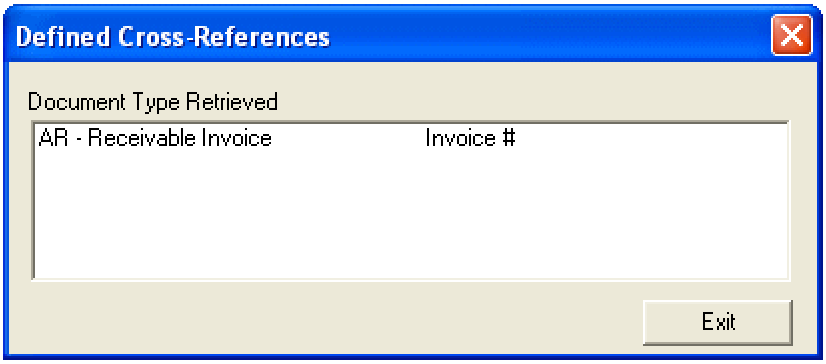
Print Documents from the Trash Can

- Select the document in the **Trash Can** list, right-click and select **Print Selected**.
- Open the document from the **Trash Can** list, right-click and select **Print**.
- Open the document from the **Trash Can** list and click the **Print** toolbar button. Depending on your system configuration, this toolbar button may or may not be displayed on your workstation.

Retrieving Cross-Referenced Documents

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

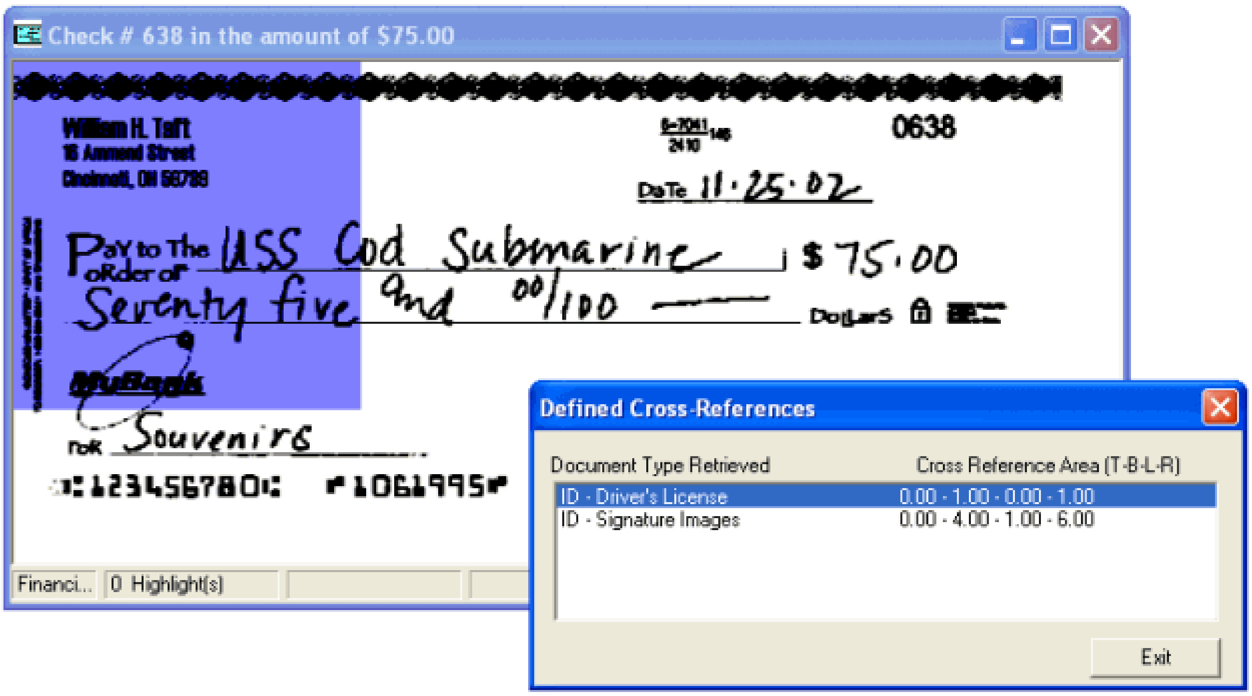
Right click from within the document and select **Cross-References** to verify cross-references exist in the document. The **Defined Cross-References** window displays any cross-references configured for that document.



Retrieving Cross-References From an Image Document

Open the document and double-click on the cross-reference double-click region. The location of the region is determined by your system administrator.

Note: To view the exact location of the double-click region, right-click from the open document and select **Cross-References**. The **Defined Cross-References** dialog box displays. Select a cross-reference from the list. The double-click region is highlighted.



Retrieving Cross-References From a Text Document

Open the document. Identify the text used for cross-referencing by performing one of the following actions:

- Highlighting the desired characters: When the text is highlighted and the left-mouse button is released, a drop-down menu appears. Select a **Cross-Reference**.
- Double-clicking on the desired text: Identified text is defined by the position of the cursor when double-clicking is initiated. (Double-clicking automatically initiates the cross-reference.) How much of the text is identified is determined by the **Select Method**.

Retrieving Cross-References From an Electronic Form

Depending on your system setup, cross-references may be initiated from an electronic form by clicking a button.

Retrieving Cross-References From Other Documents

To initiate a cross-reference from OLE documents, PDFs, or forms:

1. Click on the Document Options icon in the upper-left corner of the window displaying the document.

Note: The Document Options icon varies depending on your current context and the Document Type you are viewing.
For an example of the Document Options icon, see the illustration under Viewing Documents on page 72.

2. Select **All Cross-References** to display all cross-reference results.

   Select **View Cross-References** to limit cross-reference results by a Document Type.

Retrieving Cross-References by Double-Clicking

You can retrieve cross-references from an open document by double-clicking a specific area (double-click region) of the document. The exact position of the double-click region is critical, and dependent on the file format of the open document (image file format or text file format).

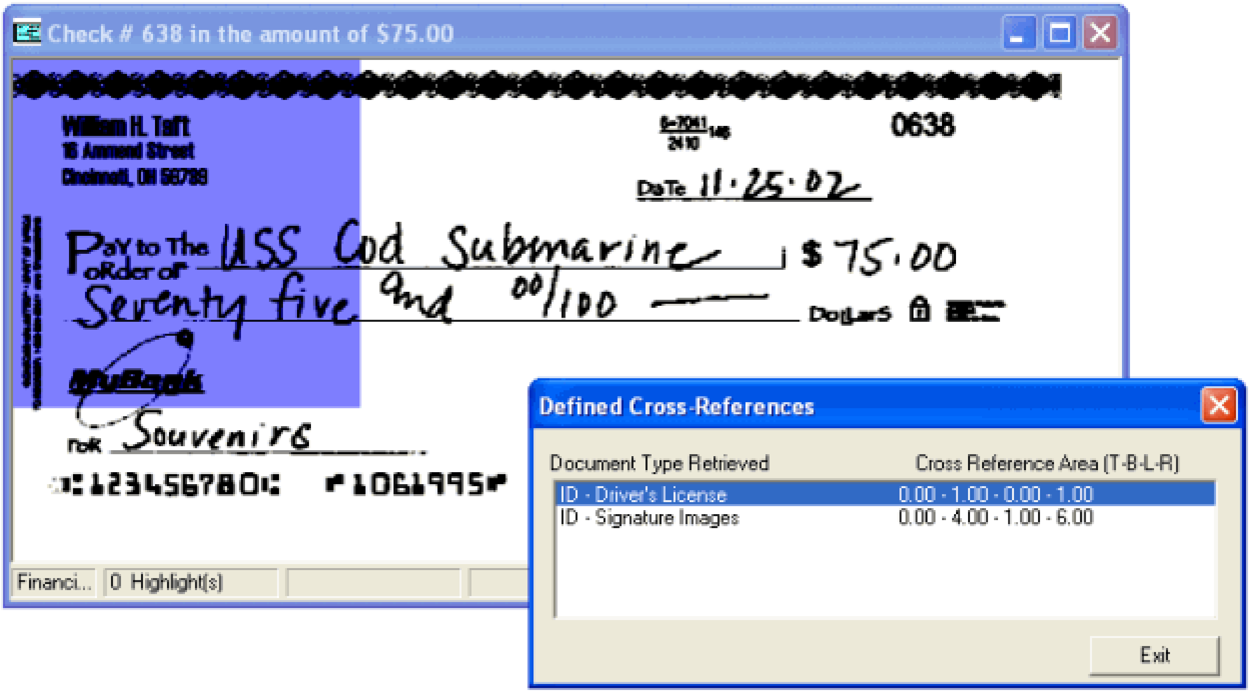
Double-Click Selection on Image Documents

1. Double-click within the designated double-click region.
2. If more than set of values meet the criteria for the cross-reference, you can elect to retrieve documents that meet the criteria for just one, for more than one, or for all of those values.

   For more information, see Retrieving Cross-References Using Multiple Values on page 196.

Identifying the Double-Click Region

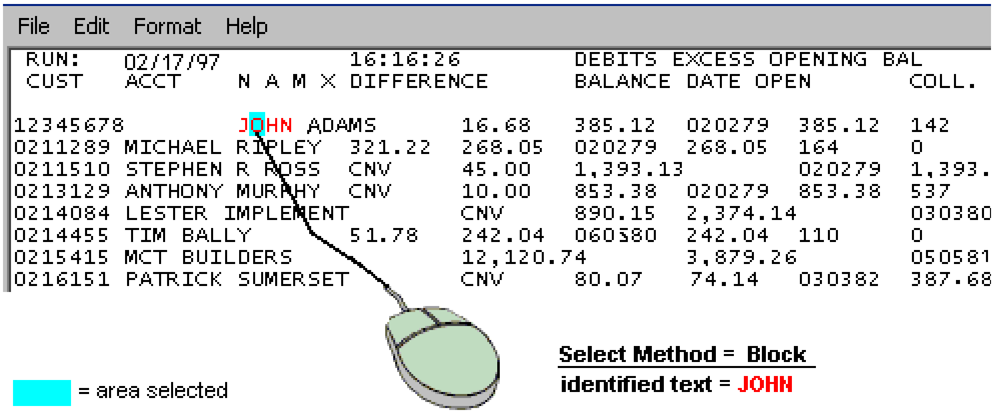
1. To view the location of the double-click region, right-click from within the open document and select **Cross-References**. The **Defined Cross-References** dialog box displays.
2. Select a cross-reference from the list. The image document highlights the double-click region.



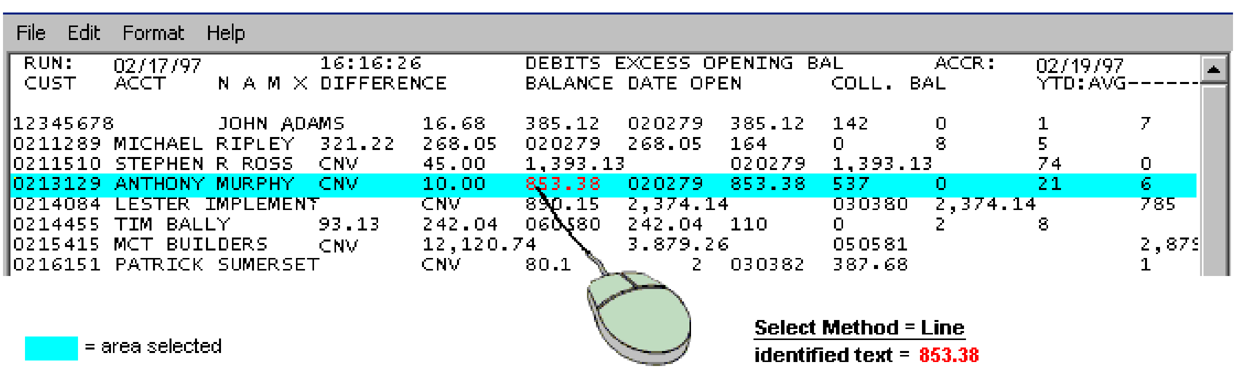
Double-Click Selection on Text Documents

For text documents, you can double-click on a text value defined by the position of the cursor. How much text is actually identified is determined by the **Select Method:**

- If a **Block Select Method** is set, the system scans for text from the cursor position, in both the right and left directions, and selects all text up to the point where a space is detected (see example). Spaces to the right and left of the double-click position act as delimiters for the identified text. Space and Character Stripping options will only be applied to the identified portion of text, not the entire line.

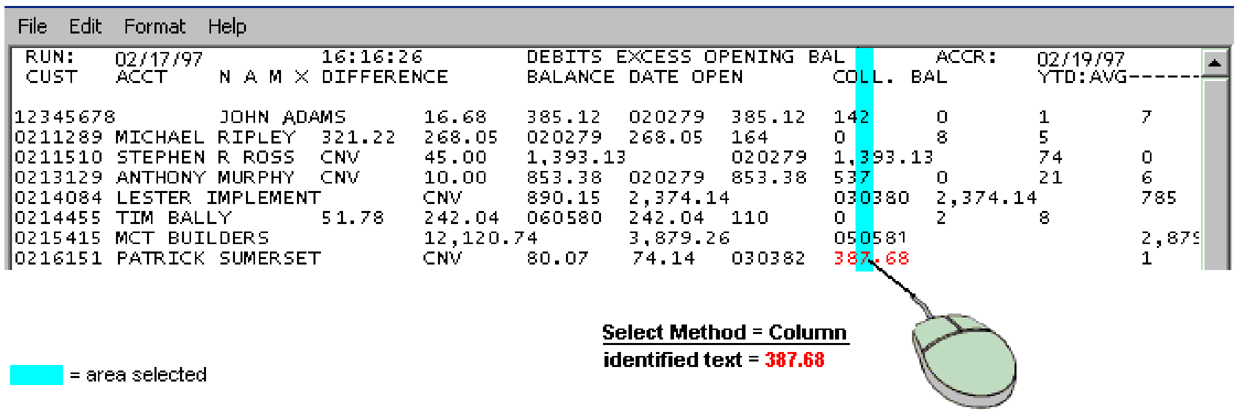


- If a **Line Select Method** is set, the system identifies the entire line. The system scans the entire line for text from the cursor position, in both the right and left directions, and selects all text up to the point where a space is detected (see example). Spaces to the right and left of the double-click position act as delimiters for the identified text. Space and Character Stripping options are applied to the line, as a whole.



Note: This sample file uses spaces to delimit entries between columns. If Tab was used between entries in the columns in this document, the identified text in this example would be **0213129 ANTHONY MURPHY CNV 10.00 853.38 020279 853.38 537 0 21 6**

- If a **Column Select Method** is set, the system highlights the double-clicked character and all characters in its column. The system then scans to the left and right of the specific character that was double-clicked, until a space is detected (see example). Spaces to the right and left of the double-click position act as delimiters for the identified text. Although the column is highlighted on the display, only the double-click characters identified in the right/left directions are identified for cross-referencing.



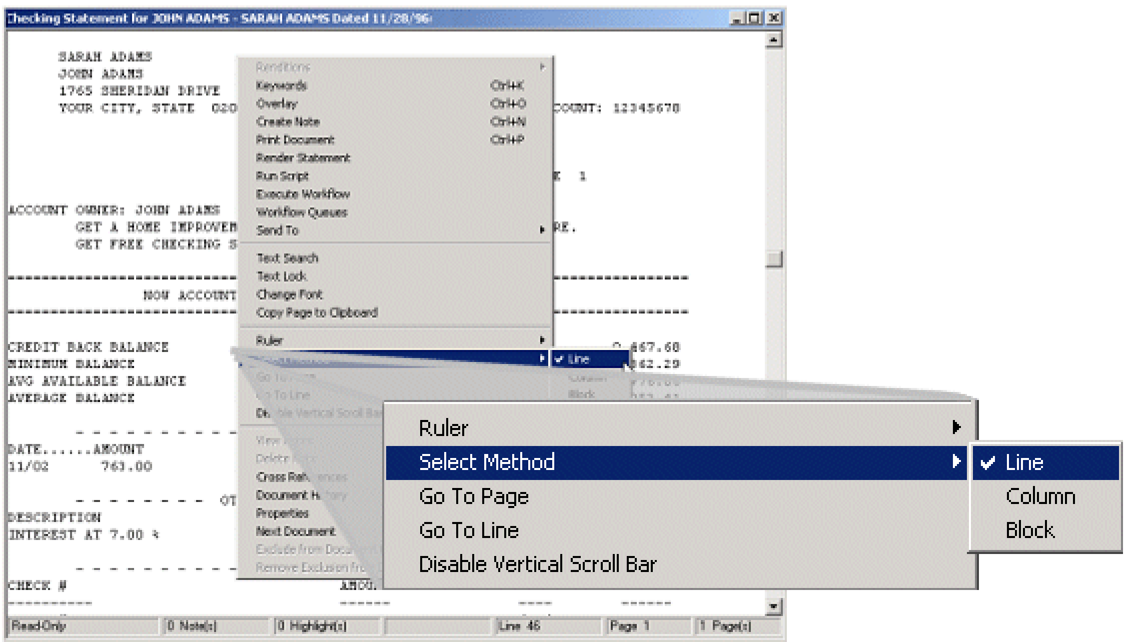
Note: If a text cross-reference was configured, any additional space and character stripping options defined will be applied to the identified text before it is used in the cross-reference. This applies to all Select Methods.

Note: If multiple text cross-references were configured with different space and character stripping options, the system can identify multiple text strings to use for finding cross-references. For example, if you double-click on “JOHN” in the name “JOHN ADAMS” the system can search for documents with Keyword Values of either “JOHN” or “JOHN ADAMS.”

Retrieving a Cross-Reference Using Highlighted Text

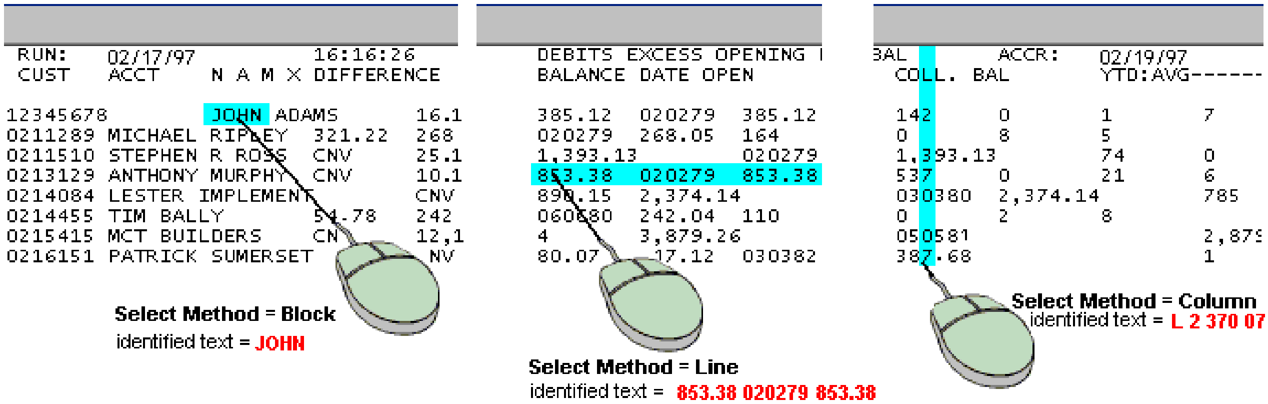
The Highlighted Text Selection method of cross-referencing involves dragging the mouse over the characters on the open document to identify those characters for use in the cross-reference. To highlight text on the open document:

1. Define the manner in which highlighting is controlled by the mouse. Right-click on the open document, or the document's status bar, and select **Method**. Then select either **Line, Column,** or **Block.**



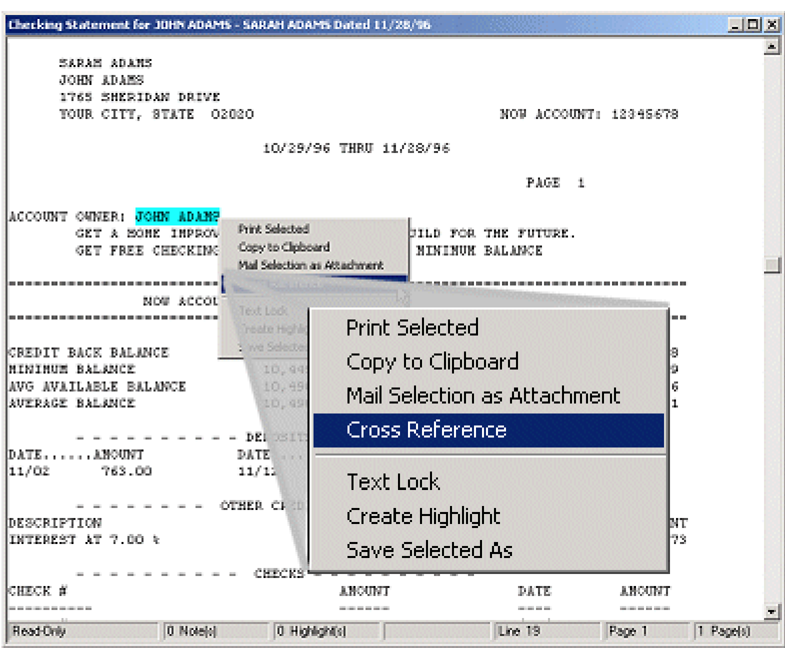
2. Locate the desired text on the open document. While holding down the left mouse button, drag the mouse over the desired text (see example).
   - If you select **Block**, dragging the mouse left-to-right and/or top to bottom highlights the corresponding rows and columns in the document.
   - If you select **Line**, dragging the mouse over an character in a line highlights the entire line.

- If you select **Column**, multiple columns, as well as all lines under those columns, will be highlighted as the mouse is dragged from left-to-right.



Note: Although all Select Methods allow multiple lines to be highlighted, cross-referencing is not permitted across multiple lines, and the error message **Cross-Reference cannot span more than 1 line** will result. Ensure that highlighted text does not exceed a single row in the document when using the **Line** or **Block** methods. Since **Column** will always highlight multiple lines, it will always result in an error message, and cannot be used for cross-referencing.

3. After the text is highlighted and the left-mouse button is released, a drop-down menu appears and **Cross-Reference** can be selected. If a text cross-reference was configured, any additional **Character and Space Stripping** options defined will be applied to the identified text.



Cross-Reference Results List Right-Click Options

You can perform many functions from a cross-reference retrieval list.

From the **Document Search Results** window or the **Cross-References For:** window, right-click or select **Window | Shortcut Menu** to see the available options.

Note: Functions are available depending on licensing and rights. Some functions are only available after you select at least one document from the list.

Text Search Using Cross-References

In some cases, you may be able to initiate a text search between two text documents.

To perform a text search, double-click on the word for which you want to search. The system searches for the word in the cross-referenced Document Type. When the word is found, the first instance of it is highlighted in the cross-referenced document.

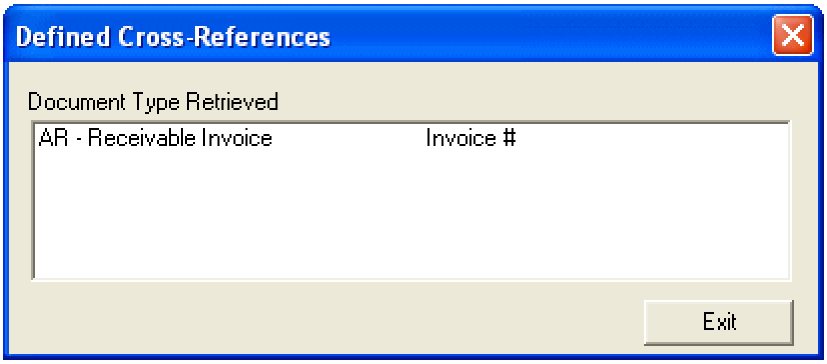
For example, if you have checking statements and loan reports cross-referenced, you could double-click an amount on the checking statement and the system searches all cross-referenced loan reports for that amount. When the amount is found on a loan report, the loan report opens and the amount is highlighted.

You can search for cross-references set up by Keyword Type, Text Search or both Keyword Type and Text Search.

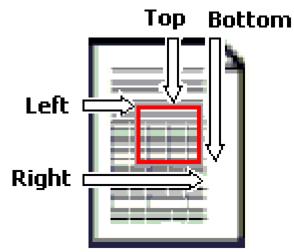
Determining a Document's Cross-Reference Settings

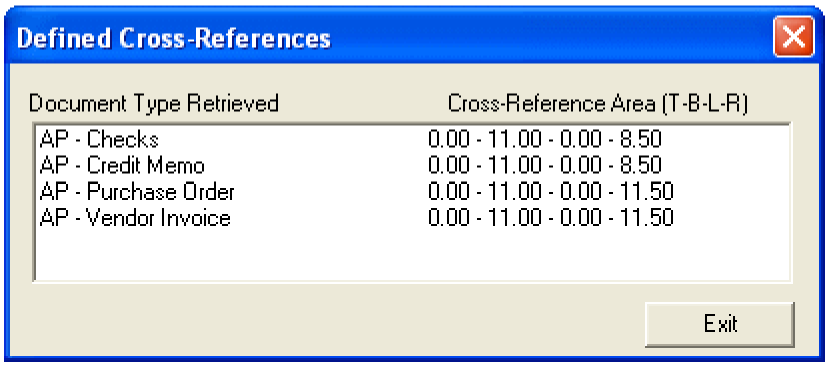
To display a list of your document's configured cross-references, do the following:

1. Open the image or text document, right-click on the document or the status bar and select **Cross-References**. The **Defined Cross-References** dialog box displays a list of Document Types that are cross-referenced with the document. The information displayed is different for text documents and image documents.
    - For text documents the **Defined Cross-References** dialog box lists the configured cross-reference and their corresponding Keyword Types.



- For image documents, the **Defined Cross-References** dialog box lists the configured cross-references and their corresponding **Cross-Reference Area (T-B-L-R)**. The cross-reference area provides the double-click region on the image. The region is defined by a Top-Bottom-Left-Right format **(T-B-L-R)**. The corresponding value is the distance in inches from the upper left corner of the document or the side of the document.





- If the values **1.00-4.00-1.00-4.00** are displayed, the top of the double-click region is one inch from the top of the document, the bottom of the region is four inches from the top of the document, the left margin is one inch from the left side of the document, and the right margin is four inches from the left side of the document. The region is a three inch area in which you can double-click to retrieve the related document.

2. If you are in an image document, select a cross-reference from the list. The corresponding cross-reference region on the image is highlighted. Double-click on the region. If you double-click outside the specified double-click region, a **Blank area double-clicked** message box displays. Double-click the item in the **Defined Cross-References** list to retrieve the cross-references.
3. To retrieve cross-references from a text document, double-click on the cross-referenced Keyword Type Value on the open document.

Viewing Cross-Reference Results

If a cross-reference is found, the results can be displayed several ways depending on display settings and the type of cross-reference being performed.

The cross-reference search results display in a list or as the actual open documents, depending on your **Document Search** setting (**User | User Options**, **Document** tab).

To display results as open documents:

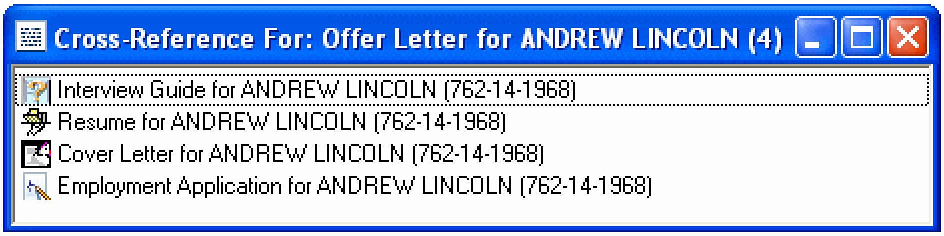
1. Select **User | User Options**.
2. Click the **Document** tab.
3. In **Document Search**, enter a number to represent the maximum number of documents top open before defaulting to the list.

   Enter 5, for example, to display open documents for five or fewer cross-reference results.

To display results in Cross-Reference For: list:

1. Select **User | User Options**.
2. Click the **Document** tab.
3. In **Document Search**, enter **0**.

   For more information, see Document Search on page 344.



Lists appear several ways:

- in the **Cross-References For:** window
- in the **Document Search Results** window

- in both the **Cross-References For:** window and the **Document Search Results** window

Note: If viewing a text document's cross-references in the list, the Keyword Type used to associate the documents displays next to the Document Type.

Display and Sort Columns

Depending on how your system is configured, the results list displays information about the documents returned in different columns, such as Document Name, Date Stored, and Document Type. Additional columns may be displayed for Folders and Notes.

If sorting is enabled, you can sort results in the results list based on the column headings. To sort the results by the data contained in a specific column, click the column heading that contains the data you want to sort the list by. To toggle the sort order of the results as ascending (e.g., A to Z, or 1 to 10) or descending (e.g., Z to A, or 10 to 1), click the column heading again.

Note: If you sort by the **Document Date** property, the results are sorted by both the date and time the document was imported into OnBase.

Retrieving Cross-References Using Multiple Values

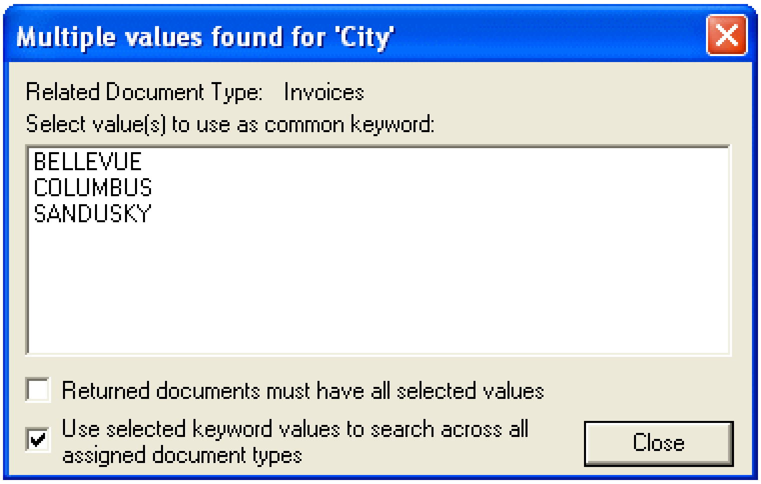
If a document contains more than one value on a Keyword Type, and you want to retrieve cross-referenced documents from that document, you can elect to retrieve documents that meet the criteria for just one, for more than one, or for all of those values.

For instance, a document has the Keyword Type **First Name** that contains two values: **Frank** and **Sarah**.

If the document is configured to retrieve cross-referenced documents that match the **First Name** Keyword Value, and you double-click to retrieve cross-referenced documents, you can choose to retrieve those that match **Frank** or **Sarah**.

Selecting Values by which to Retrieve Cross-Referenced Documents

1. When retrieving cross-referenced documents, if the **Multiple values** dialog box displays, select the values by you wish to retrieve.
   - Click a value to select it.



   - Select as many values as you want for the search.
2. Elect to retrieve only those cross-referenced documents that contain both values by selecting **Returned Documents Must Have All Selected Values**.
3. If you want to use the selected values to retrieve documents for all Document Types assigned to the cross-reference, select **Use selected keyword values to search across all assigned Document Types**. If multiple Document Types are assigned and you do not select this option, this dialog box displays for each Document Type, allowing you to select different values for different Document Types.

Note: To cancel the cross-reference, click **Close** with no Keyword Values selected. The **Cross-Reference Information** dialog box asks whether you want to quit. Click **Yes**. If multiple Document Types are assigned, you must close the **Multiple values found for** dialog box for each one.

Organizing Your Documents

There are several methods available to you to organize your documents. You can organize your documents into a virtual filing system by using envelopes or folders.

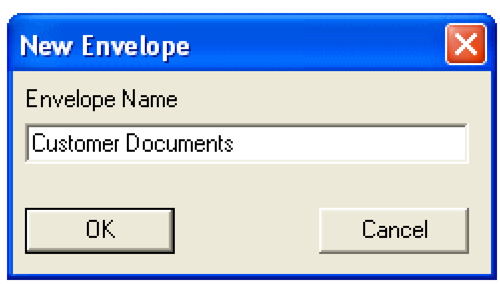
Using Envelopes

Envelopes provide you with a personal filing system to group documents together for easy access. Only the person who creates an envelope can view that envelope unless he or she wants to share it with other users. Since the envelope is simply an alternate way to retrieve documents, the documents remain accessible through the standard retrieval methods such as the **Document Retrieval** dialog box and custom queries.

For more information, see Envelope on page 7.

Creating an Envelope

1. In the OnBase Client module, open the **New Envelope** dialog box one of two ways:
   - Click the **Create New Envelope** toolbar button.
   - Select **User | Envelopes | New Envelope**.
2. Type a logical name for the envelope.



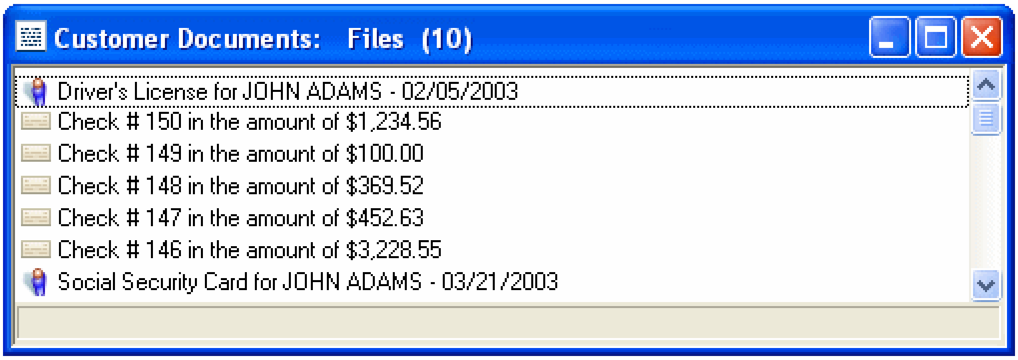
3. Click **OK** to create and open the envelope. The envelope's title bar includes the envelope name and the number of documents in the envelope.

Opening an Existing Envelope

Open existing envelopes by selecting **User | Envelopes | Open Envelope**.

The **Open Envelope** dialog box displays. The title bar displays the number of envelopes you currently have access to. When you select an envelope, the **Open Envelope** status bar displays the number of files in the selected envelope.

To open an envelope, double-click on it or select one or more envelopes, right-click and choose **View Selected**. Envelope contents display in the same format as a Document Search Results list.



Adding and Removing Documents

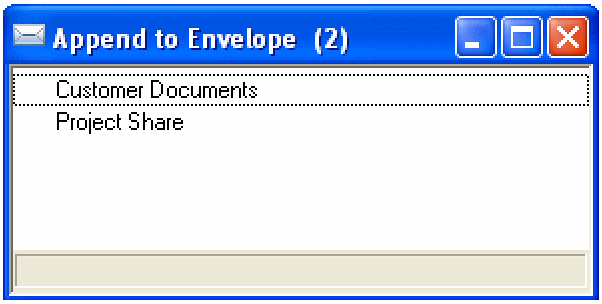
Adding Documents to an Envelope:

From the **Document Search Results** list:

1. Select one or more documents from the **Document Search Results** list.
2. Right-click on the selected documents and select **Send To | Envelope**.

Note: Documents must be indexed before being added to an envelope.

The **Append to Envelope** window is displayed. The number of available envelopes displays in the title bar.



3. Double-click the envelope(s) to which you want to append the document(s).

From the **Text Search Results** list:

1. Select one or more documents from the list.

Note: Do not double-click the document(s) to display a list of occurrences of the search string. The document cannot be added to the envelope from this list.

2. Right-click on the selected document(s). The cursor changes to an image of a document with a hook through the top-right corner.
3. Drag the document(s) to the open envelope.

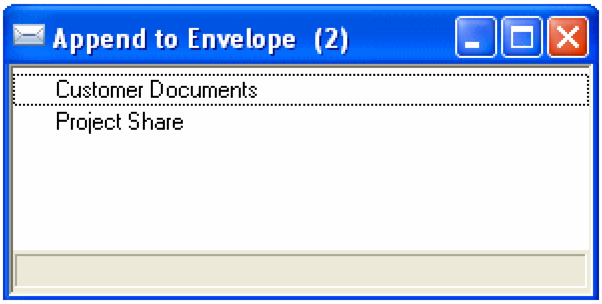
Note: Documents must be indexed before being added to an envelope.

From an open document:

1. Right-click on the document and select **Send to | Envelope**.

Note: Documents must be indexed before being added to an envelope.

The **Append to Envelope** window is displayed. The number of available envelopes is displayed in the title bar.



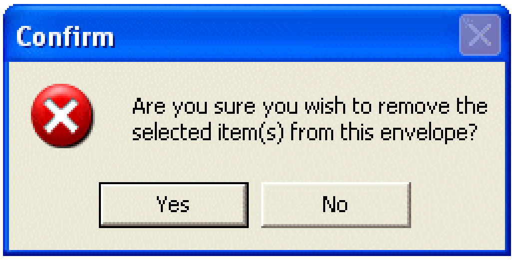
2. Double-click the envelope(s) to which you want to append the document(s).

Removing Documents from an Envelope:

1. Open existing envelopes by selecting **User | Envelopes | Open Envelope**.
2. Open an envelope from the **Open Envelope** dialog box.
3. Select the document(s) to remove.

4. Right-click and select **Remove** the selected document from the envelope, or select **Remove All** to remove all documents from the envelope.

   A confirmation message displays, asking you to confirm the removal of selected items from the envelope.



Note: The documents are removed from the envelope, but not permanently deleted from the system. They can still be retrieved through the **Document Retrieval** dialog box.

Viewing Documents in an Envelope

Double-click on a document in the envelope to view it.

Note: Depending on your rights, you may only be able to see either revisions or versions of any document that may reside within an envelope. Documents that you do not have rights to view contain the word **Restricted** in the Auto-Name String.

Printing Documents in an Envelope

Documents in an envelope can be printed in individually, in groups of selected documents or all at once.

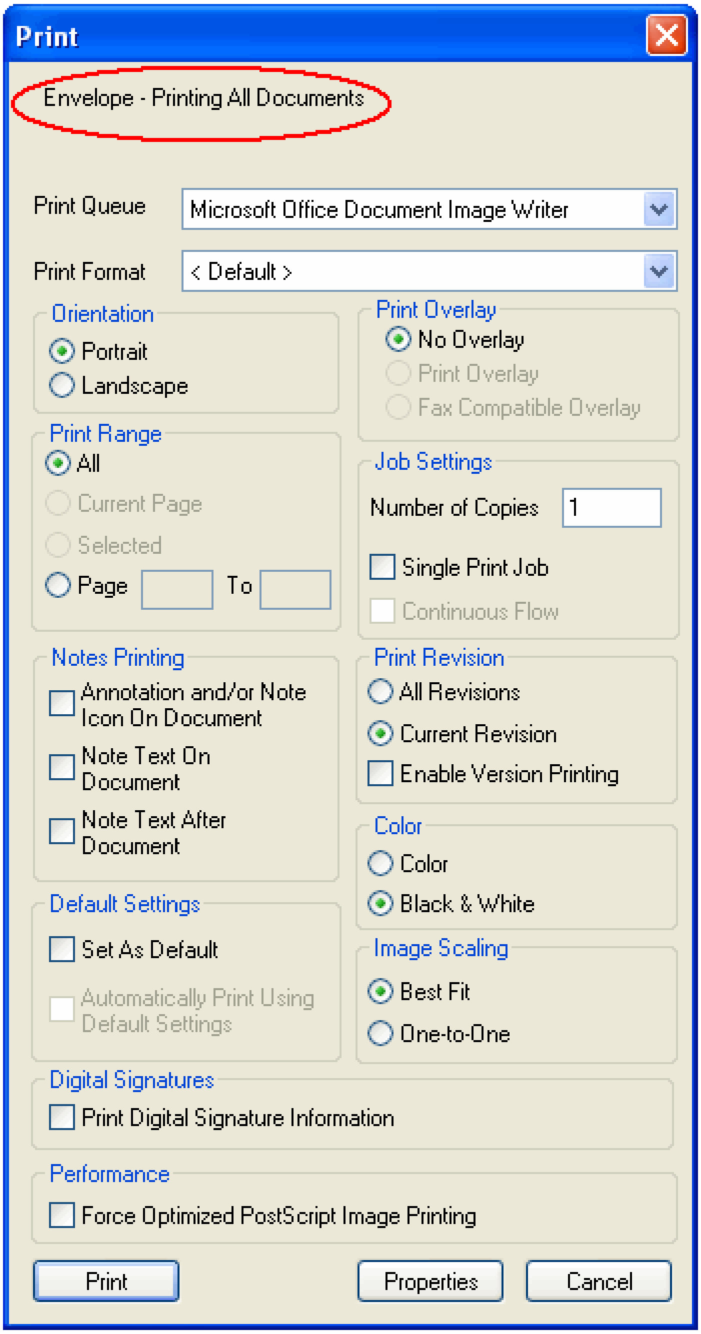
Printing All Documents in an Envelope

To print all documents in an envelope:

1. Open existing envelopes by selecting **User | Envelopes | Open Envelope**.
2. Open an envelope from the **Open Envelope** dialog box.

3. Right-click on the **Envelope** window and select **Print All**.

   The **Print** dialog box is displayed. It indicates that all documents in the envelope are to be printed.



4. Click **Print**.

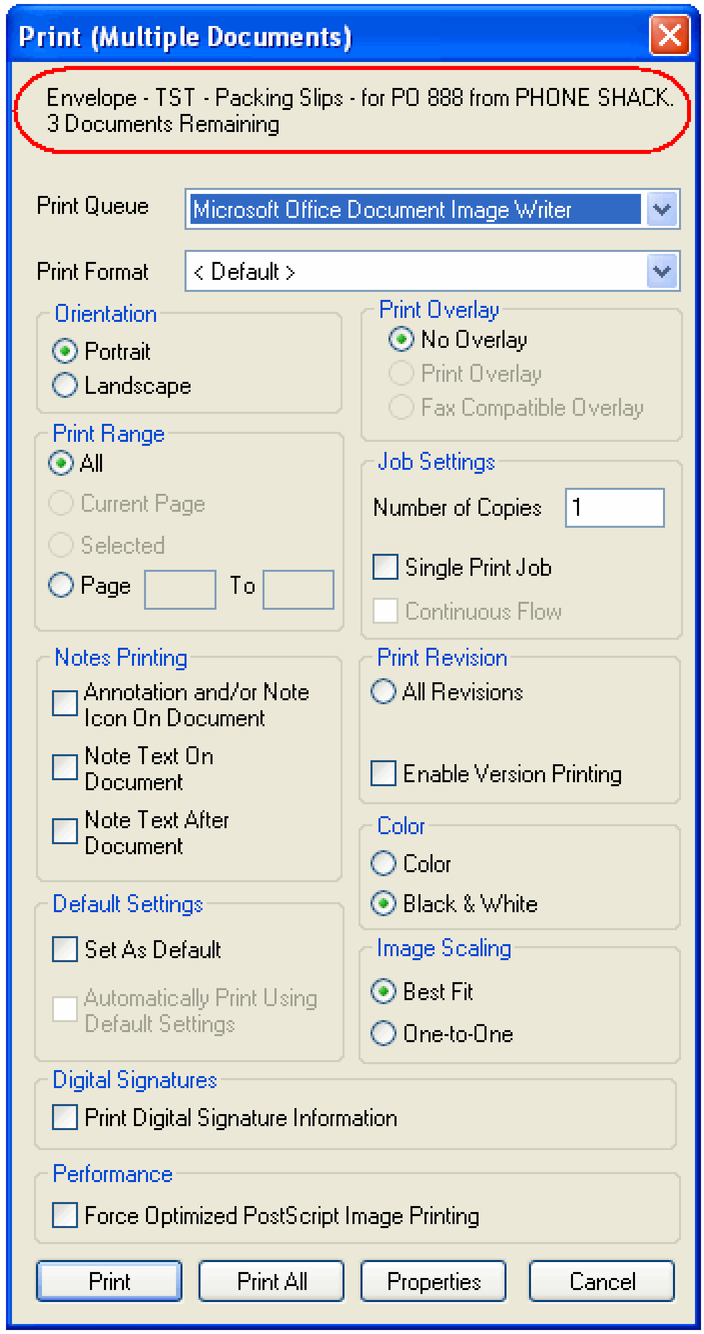
Printing One or More Selected Documents from an Envelope

To print one or more selected documents from an envelope:

1. Open existing envelopes by selecting **User | Envelopes | Open Envelope**.
2. Open an envelope from the **Open Envelope** dialog box.
3. Select one or more documents from that envelope.

4. Right-click on the Envelope window and select **Print**.

   The **Print** dialog box is displayed. The auto-name string of the first document that was selected and the total number of documents selected is displayed.



5. To print the first document, click **Print**. To print all selected documents, click **Print All**.

Note: Each document selected is treated as an individual print job unless the **Single Print Job** check box is selected.

6. Once the first document is printed, the **Print** dialog box is displayed for the next selected document. Note that the number of documents remaining has been updated on the **Print** dialog box.
7. Click **Print** to print the selected document or click **Print All** to print all remaining documents.

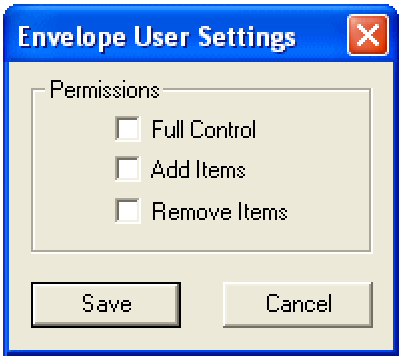
Note: If **Print All** is selected after one or more of the selected documents have already been printed, the documents that have already been printed are not re-printed.

Sharing an Envelope

Note: To share an envelope, you must have full control of the envelope and envelope sharing privileges.

To share an envelope and its contents with other users,

1. Select an envelope.
2. Right-click and select **Envelope Sharing**.
   The **Envelope Sharing User Configuration** dialog box displays.
3. Add the user(s) to share the envelope with.
4. To allow additional permissions for each user, select the user and click **Settings**.
   The **Envelope User Settings** dialog box displays.



5. Assign the user appropriate permissions, which are described in the following table:

Permission	Description
Full Control	Allows the selected user to do the following: • Share the envelope. • Add documents to the envelope. • Remove documents from the envelope.
Add Items	Allows the selected user to add documents to the envelope.
Remove Items	Allows the selected user to remove documents from the envelope.

6. Click **Save**.
7. Click **Close** to exit **Envelope Sharing User Configuration** dialog box.

Envelope Right-Click Options

Within the **Open Envelope** dialog box, select an envelope or envelopes and right-click to display a list of options.

- To open an envelope, double-click on it or select one or more envelopes, right-click and choose **View Selected**.
- To deselect an envelope or envelopes, right-click and select **Clear Selected**.
- To delete a selected envelope or envelopes, select the envelope(s), right-click and select **Delete Selected**.
- To share envelopes with other users, select **Envelope Sharing**.
- To print all documents within an envelope, right-click and select **Print All**.
- To print a specific document, select that document, right-click and select **Print**.

  From the **Print (Multiple Documents)** dialog box, you can print the selected document by clicking **Print** or print all the documents within the envelope by clicking **Print All**.

  For more information on printing in the OnBase Client, see Printing Documents on page 144.
- To save multiple documents to a Zip file, select more than one document, right-click, and select **Send To | Zip File** or **Send To | Encrypted Zip File**.

  For more information on saving documents to a Zip file, see Save as Zip File or Encrypted Zip File on page 285.
- If necessary, click **Refresh** after making changes to update the display.

Working With Folders

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

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

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

For more information about working with folders, see Advanced File Cabinets Window on page 214 or Classic File Cabinets Window on page 225.

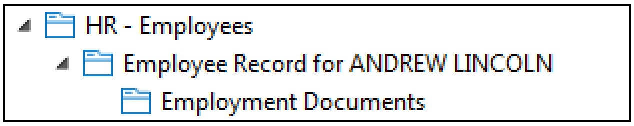
Folder Definition

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

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

Folder Hierarchy

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



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

Folder Contents

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

Static Folder

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

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

  Documents imported using this method can be automatically indexed with the static folder's Keyword Values, provided that the folder's Keyword Types also exist on the Document Type.
- Documents residing in a static folder do not have to share the same Document Type or Keyword Values.

Dynamic Folder

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

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

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

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

Using Dynamic vs. Static Folders

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

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

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

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

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

File Cabinet

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

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

Creating a File Cabinet

File cabinets are created by your system administrator in the Configuration module.

Auto-Foldering

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

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

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

Related Folders

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

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

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

Folder Options in the Client

For an overview of working with folders, see Advanced File Cabinets Window on page 214 or Classic File Cabinets Window on page 225.

Folder Right-Click Options and Available Features

The following right-click options may be available from the **Folder Tree** pane, from the **Child Folders** pane, or from a folder pop-up list:

- **New Folder** - See Creating Folders in the Client on page 234.
- **Find Folder** - See Folder Search on page 227.
- **Template** - See Applying a Folder Template on page 248.
- **Filter Documents** - See Applying Folder Filters on page 250.
- **Remove From Folder** - See Removing Documents from Folders on page 242.
- Adding and Removing Documents on page 240
- **Keywords** - See Working With Folder Keywords on page 252.
- **Delete** - See Deleting Folders and Documents in a Folder on page 243.
- **Remove From List** - See Working with Folder Pop-up Lists on page 231 or Folder Search on page 227.
- **Open in New Window** (Advanced File Cabinets window only)
- **View Selected** - See Open a Folder and View Documents on page 225.
- **Folder Contents** - Select to apply an action to all documents in the folder. The action doesn't apply to documents within child folders, unless otherwise specified. (For example, selecting **Folder Contents | Print | Folder and Child Folder Documents** allows you to print all documents in both the folder and its child folders. For printing information, see Printing Folder Contents on page 266.)
- **Refresh** - Select to refresh a pane's contents.
- **Properties** - See Folder Properties on page 267.

Note: Additional right-click items are either basic Client options or associated with a separately licensed module. For information about these items, see the Document Options and Right-Click menus in the general Client Help, or see the specific module's help files.

Using Folders

The OnBase Client offers two types of File Cabinet windows: advanced and classic. You can configure which window you prefer through User Options.

The **advanced** File Cabinets window offers additional features for retrieving folders and documents.

- Child folders can be displayed in tabs and pop-up lists. These display options are chosen by your system administrator and may differ per Folder Type.
- The window contains a document viewer that is reused to display each document you open, allowing you to view documents within the File Cabinets window.
- You can work in multiple advanced File Cabinets windows simultaneously.

To use the advanced File Cabinets window, see Advanced File Cabinets Window on page 214.

The **classic** File Cabinets window does not support the same search and display features as the advanced File Cabinets window, but it offers similar functionality.

- Pop-up lists are not supported, but you can use the folder filter to filter child folders by folder name.
- Documents opened from the classic File Cabinets window are displayed in a new window, allowing you to open and view multiple folder documents simultaneously. In the advanced File Cabinets window, this is achieved by right-clicking a document and selecting **Open in New Window**.
- You can have only one classic File Cabinets window open at a time.

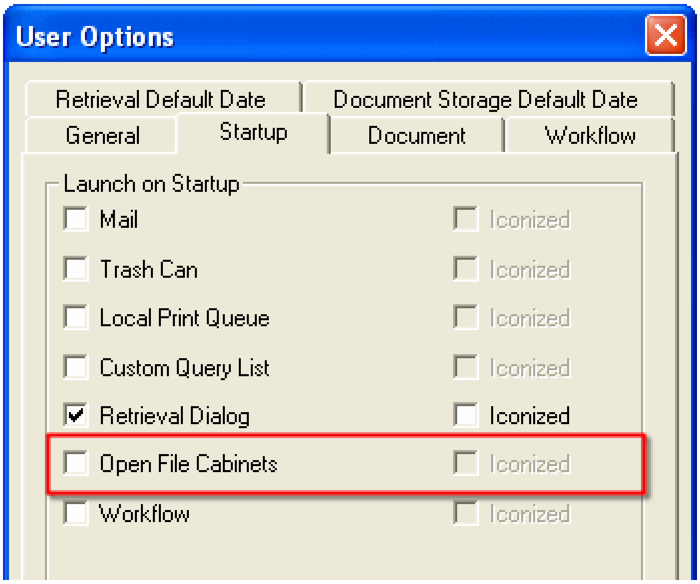
To use the classic File Cabinets window, see Classic File Cabinets Window on page 225.

Opening File Cabinets on Startup

If you work with OnBase folders frequently, you may want the OnBase Client to open the File Cabinets window on startup. You can set a user option to open the File Cabinets window automatically when you log on to the OnBase Client.

1. Select **User | User Options** to display **User Options**.
2. Click the **Startup** tab.

3. Select **Open File Cabinets**.



4. To have the File Cabinets window displayed as an open window when you log on, clear the **Iconized** check box. If **Iconized** is selected, the File Cabinets window is opened when you log on, but it is minimized at the bottom of the OnBase Client window.
5. Click **OK**.

Working with Folders Overview

Folders keep related information together, allowing you to group and retrieve documents based on Keyword Values. For example, a folder might contain all documents relevant to one employee, even if the documents have different Document Types.

Depending on a folder's configuration, its contents may be ordered by:

- Document Date (ascending or descending)
- Document Type Number
- Document Type Name (ascending or descending)
- The Document Type order specified in the Folder Type configuration
- Document Name (ascending or descending)
- Random order

Advanced File Cabinets Window

To use the advanced File Cabinets window, clear the **Classic File Cabinets Window** option in User Options.

1. From the OnBase Client, select **User | User Options**.
2. On the **General** tab, clear **Classic File Cabinets Window**.
3. Click **OK**. The change is effective when you open a new File Cabinets window.

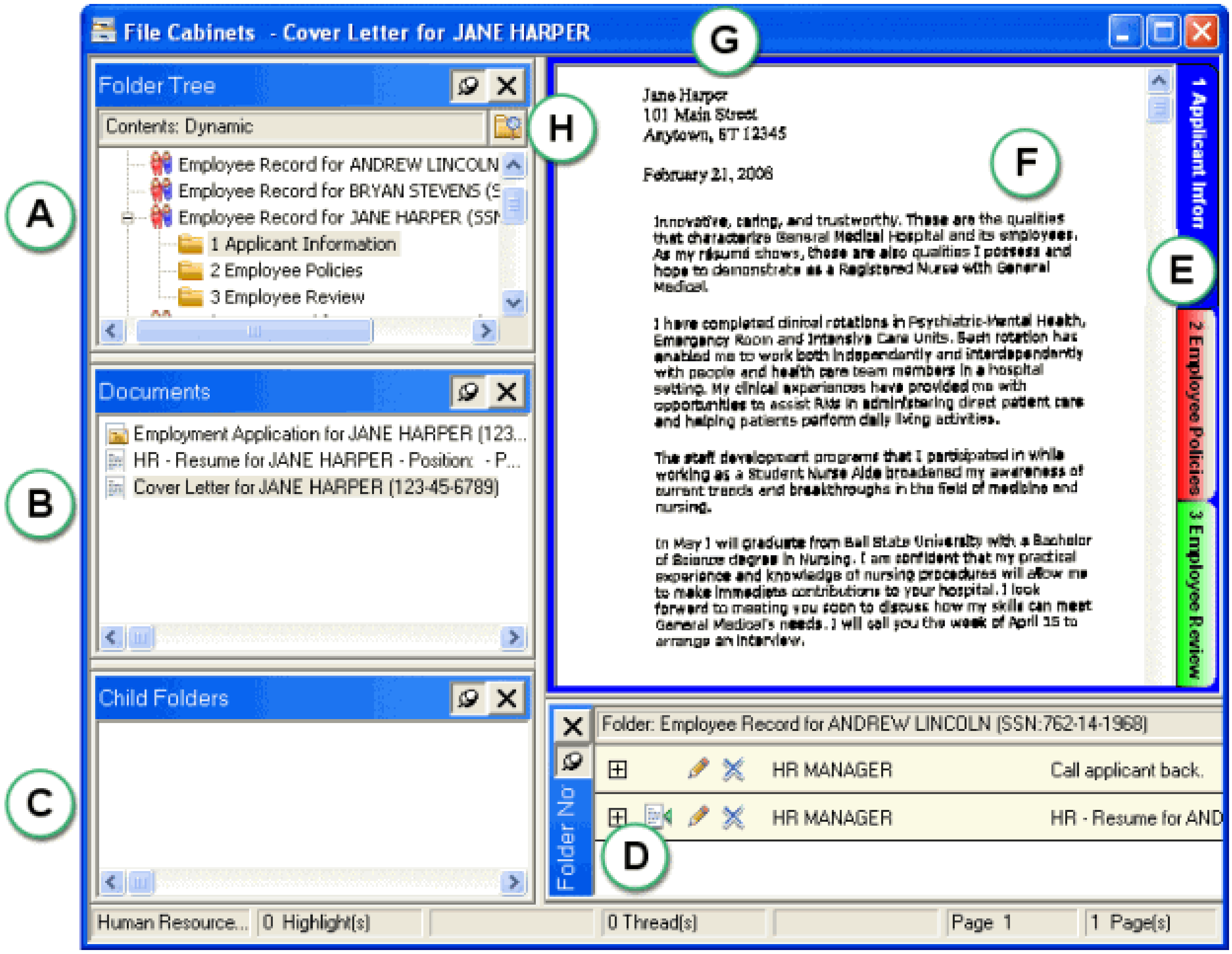
For information about using the advanced File Cabinets window, see the following sections:

- Navigating the Advanced File Cabinets Window on page 216
- Open a Folder and View Documents on page 218
- Open Multiple Documents at the Same Time on page 219
- Displaying Folder Search Upon Clicking a Folder on page 219
- Customizing the Advanced File Cabinets Window on page 220

Note: Running the OnBase Client at resolutions lower than 1024x768 impedes functionality and may prevent the File Cabinets window from working efficiently.

Navigating the Advanced File Cabinets Window

The advanced File Cabinets window comprises a set of panes for navigating OnBase folders. Each pane has a caption, or label, to describe its contents.



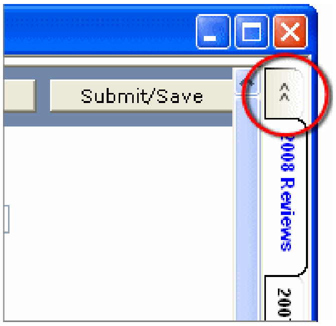
Tip: To customize the File Cabinets window, you can rearrange, float, and close panes. For instructions and other tips, see Customizing the Advanced File Cabinets Window on page 220.

Components of the advanced File Cabinets window are described in the following table:

	Component	Description
A	**Folder Tree Pane**	The folder tree illustrates the folder structure and the location of the current folder within the folder hierarchy. The **Contents** bar at the top of the pane indicates the type of contents within the current folder. For example, if the folder is dynamically populated with documents based on matching Keyword Values, **Dynamic** is displayed.

	Component	Description
B	**Documents Pane**	This pane lists documents residing in the selected folder. Depending on your configuration, this pane may also display any documents that statically reside in the selected folder's child folders. Static documents are documents that are manually added to a folder.
C	**Child Folders Pane**	This pane displays child folders residing in the selected folder.
D	**Folder Notes Pane**	This pane displays folder notes in the current branch of the folder tree, if the branch is set up to allow notes. For information about folder notes, see Working with Folder Notes on page 259.
E	**Child Folder Tabs**	Depending on your folder system's setup, some parent folders may display their child folders as tabs on the right side of the File Cabinets window. Each tab represents a child folder within the parent folder. Click a tab to view the child folder's contents. When you click a tab, the background color of the Document Viewer matches the tab's color.
F	**Document Viewer**	The Document Viewer displays the document selected in the **Documents** pane.
G	**Document Auto-Name**	The title bar displays the Auto-Name of the selected document.
H	**Find Folder Button**	Click this button to search for specific folders in OnBase. More information about this feature is provided under the Folder Search topic.

If both the current folder and its parent folder are displayed as tabs, use the Up tab to select the parent folder of the current folder.



Keyboard Shortcuts

Use the following keyboard shortcuts to navigate the advanced File Cabinets window:

Shortcut	Action
Tab	Navigates counter-clockwise to the next pane.
Shift + Tab	Navigates clockwise to the next pane.
Esc	Closes an open pop-up window

Use your keyboard's arrow keys to scroll through a list of documents in the **Documents** pane. As you scroll through the documents, the selected document is displayed in the Document Viewer.

Tip: Use Client Module Shortcut Keys to navigate documents that are displayed in the Document Viewer. See this topic in the Client help for additional information.

Open a Folder and View Documents

To retrieve a document from a folder, navigate to the folder in the File Cabinets window and select the document from the **Documents** pane.

1. If the File Cabinets window is not already open, open it using either of the following methods:
   - Click the **Open File Cabinets** button from the main Client toolbar.
   - Select **File | Open | File Cabinets**.
2. Click a file cabinet to open it.
3. Select a folder to display its contents.
   - The **Child Folders** pane lists all child folders of the selected folder.
   - The **Documents** pane lists all documents in the selected folder.
   - The first document in the selected folder may be displayed in the document viewer, depending on your system's settings.
   - If the folder is configured to display its child folders as tabs, the first child folder is opened.

Note: Depending on the Folder Type configuration, the **Documents** pane may list all static documents residing in the selected folder's child folders. Static documents are those that have been manually added to a folder. See your system administrator for information about your folder system's configuration.

4. To open a folder from the **Child Folders** pane, do one of the following:
   - Double-click the folder.
   - If child folders are displayed as tabs, click the folder's tab.

5. To open a document, select it from the **Documents** pane.

Note: If a document is displayed in the advanced File Cabinets window and you make a change that requires user intervention to save, you cannot use Clear Selected or select another document until you either discard your changes or store the document as a new document or revision. For example, if you modify an ODMA-compliant document, like a Microsoft Word document, OnBase prompts you with the message **Changes cannot be applied to the current document because it is marked as read-only. Would you like to store it as a new document?** Click **Yes** or **No** to proceed.

Open Multiple Documents at the Same Time

To view multiple documents residing in a folder at the same time, use the **Open in New Window** option. This option allows you to open one or several folder documents in new windows and use the File Cabinets window to view another document.

1. From the **Documents** pane, select the document you want to open in a new window.
2. Right-click and select **Open in New Window**. The document is displayed in a separate window.
3. From the **Documents** pane, click another document to display it in the File Cabinets window. You can also display it in a new window as described in the previous step.

Displaying Folder Search Upon Clicking a Folder

Some Folder Types are configured to display the **Find Folder** dialog box when a folder of that Folder Type is selected. This dialog box allows you to search either for child folders within the selected folder, or for any folder in OnBase you have permission to access. Once you retrieve a folder, the folder is displayed in the **Folder Tree** pane as long as the File Cabinets window remains open.

For more information about folder searching, see Folder Search Using the Advanced File Cabinets Window on page 227.

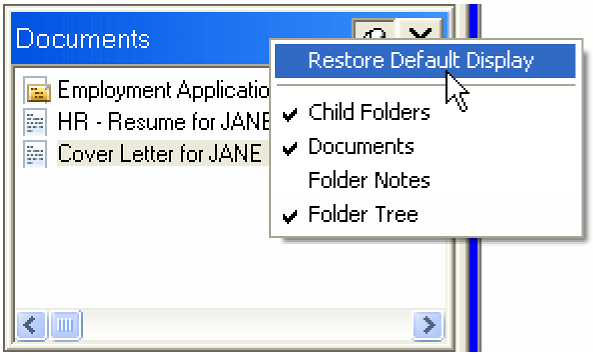
Customizing the Advanced File Cabinets Window

The advanced File Cabinets window lets you customize the size and position of its panes. Use this feature to maximize the document display area while retaining easy access to folders.

When you modify the window, your changes are preserved between OnBase sessions, provided that you do not close the **Folder Tree** or **Documents** panes. When you re-open the File Cabinets window, its arrangement is the same as it was when you last closed the window.

Note: The **Folder Tree** and **Documents** panes are integral to folder usability. If either of these panes is closed when you close the File Cabinets window, then the window is automatically restored to its default display the next time you open it.

To quickly restore the window's default arrangement, right-click any pane's caption, and select **Restore Default Display**. The caption is the blue bar displaying the pane's name.



You can customize the File Cabinets window by:

- Floating panes to place them anywhere on your screen. See Docking and Floating Panes on page 221.
- Changing panes' positions within the File Cabinets window. See Moving Docked Panes Within the File Cabinets Window on page 222.
- Sharing panes' docking positions. When panes share a docking position, you can toggle between them by selecting the corresponding tab. See Sharing Docking Positions on page 222.
- Unpinning panes so that they are hidden until you need them. When the panes are unpinned, their captions remain available at the edge of the File Cabinets window. The panes are automatically displayed when your pointer rests over their captions. See Unpinning Panes on page 223.
- Closing panes you do not use. You can open them again from the right-click menu. See Closing Panes on page 224.

To move a pane, click its caption and drag it to a new location. As you do so, an outline of the pane is displayed to show you where it will be placed when you release the mouse button.

Note: If you open a folder document and close all the panes, then you cannot access the panes or the restore option from the right-click menu; only the document's right-click options are available. To restore the default display, close and re-open the File Cabinets window.

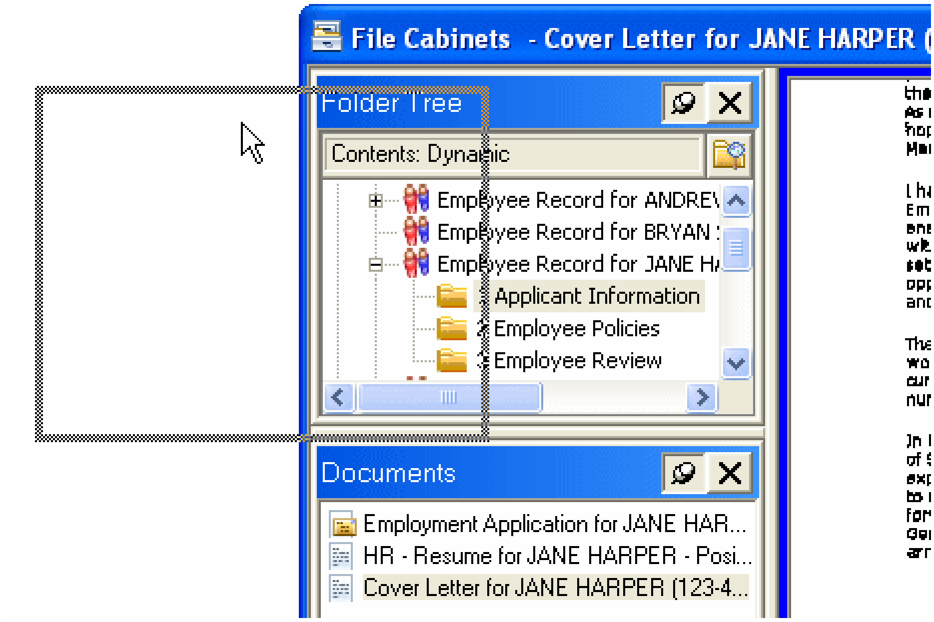
Docking and Floating Panes

A pane's docking position refers to the pane's location within the File Cabinets window. When a pane is docked, it is attached to the File Cabinets window. When a pane is floating, it is displayed in its own window separate from the File Cabinets window.

Tip: To provide quick access to OnBase folders while you are working in other applications, move a floating pane outside the OnBase Client window. For example, you can move the **Folder Tree** onto a second monitor and work in another application on your primary monitor. When you select a folder from the **Folder Tree**, the OnBase Client is brought to the foreground of your primary monitor, and you can access your documents in OnBase.

- To float a pane, click and drag its caption away from the File Cabinets window, or double-click the caption. The caption is the blue bar displaying the pane's name.

  If the pane shares a docking position with another pane, double-click the tab of the pane you want to float. To float all panes that share a docking position, you can either double-click one pane's caption, or click and drag one pane's caption away from the File Cabinets window.



- To dock a pane, drag it to any border within the File Cabinets window (excluding the status bar at the bottom of the window). When you drag the pane over a position where it can be docked, the pane's outline snaps to the docked position.

Moving Docked Panes Within the File Cabinets Window

You can click and drag a pane to a new, docked position within the File Cabinets window. When you drag a pane to a dockable position in the window, the pane's outline snaps to the docked position.

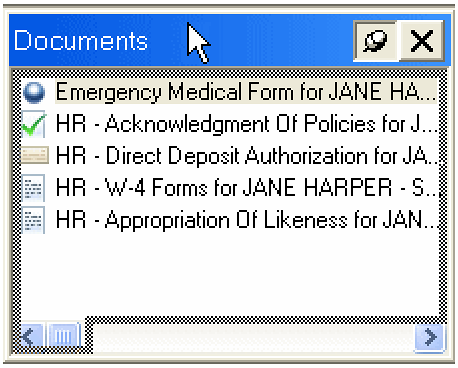
A pane can be docked to any border within the File Cabinets window, including borders of other panes. The status bar at the bottom of the window is an exception, but you can dock a pane directly above it.

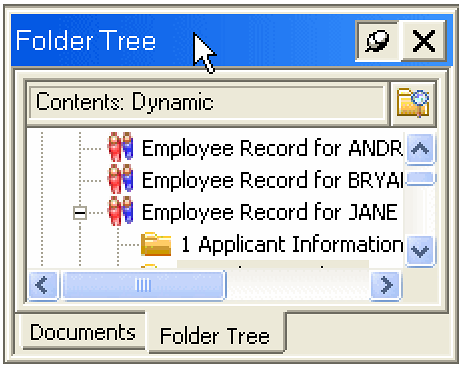
If the pane will share a docking position with another pane, the pane's outline changes to include a tab. For information about sharing docking positions, read the following section.

Sharing Docking Positions

To share a docking position between panes, drag one pane to the caption of another pane. Shared docking positions help reduce the number of panes displayed at one time while providing easy access to each pane. When panes share a docking position, each pane includes a tab to let you switch between them. To display a pane in a shared docking position, click its tab.

In the following example, the picture on the left illustrates a pane's outline when it is dragged to a shared docking position. The picture on the right illustrates two panes share a docking position. All folder panes can share the same docking position.

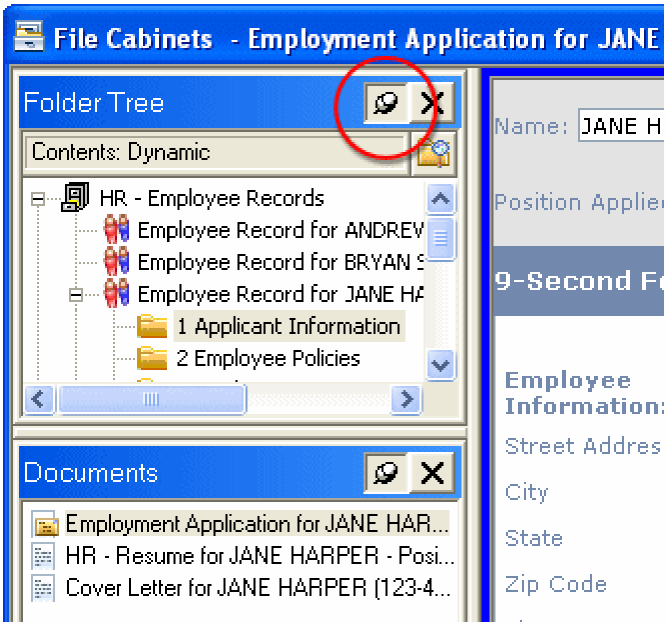




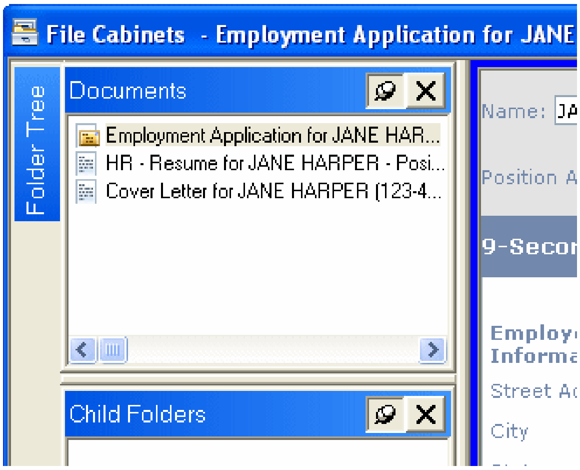
To detach a pane from a shared docking position, double-click the pane's tab. The pane then floats in its own window, allowing you to drag it to a new position.

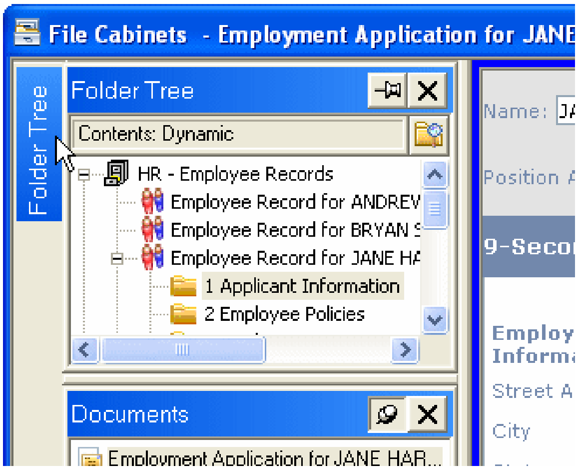
Unpinning Panes

By default, all panes in the File Cabinets window are pinned to their current positions. When panes are pinned, they remain displayed as long as the File Cabinets window is open. You can unpin panes so that they are automatically hidden when not in use. To unpin a pane, click the pin within the pane's caption. Pins are available only on panes that are currently docked to the File Cabinets window.



When a pane is unpinned, its caption is displayed at the edge of the File Cabinets window. The pane itself is not displayed until you place your pointer over the caption. The following example illustrates what happens when the **Folder Tree** pane is unpinned. In the picture on the left, the pane is not displayed, but the **Folder Tree** caption is available so the user can access it. In the picture on the right, the **Folder Tree** pane is displayed when the user places the pointer over the caption.





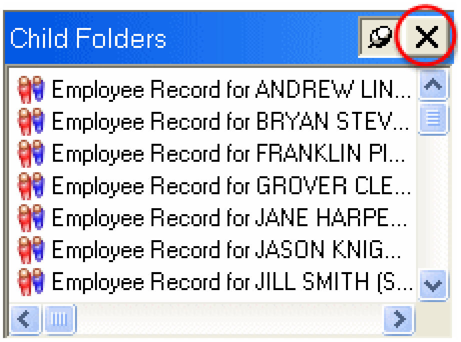
To pin a pane that is currently unpinned, click the pin in the pane's caption. When pinned, the pane remains displayed in the File Cabinets window.

Note: If you unpin a pane that is sharing a docking position, all panes that share the docking position will be unpinned. The displayed caption reflects only the most recent pane you viewed. When you place your pointer over the caption, the pane and the tabs of any shared panes are displayed.

Closing Panes

Closing panes removes them from the File Cabinets window. This feature lets you remove panes that you use infrequently and don't want taking up space on your screen. To close a pane, use either of the following methods:

- Click the **Close** button in the pane's caption.



- Right-click any caption and select the pane you want to close.

Clicking the **Close** button within an active tab of a shared docking position will only close the corresponding pane. This does not apply if the tabs reside in a floating pane.

To display a pane that you closed, right-click any caption and select the pane from the right-click menu.

To reset the File Cabinets window to its default arrangement, right-click any pane's caption and select **Restore Default Display**.

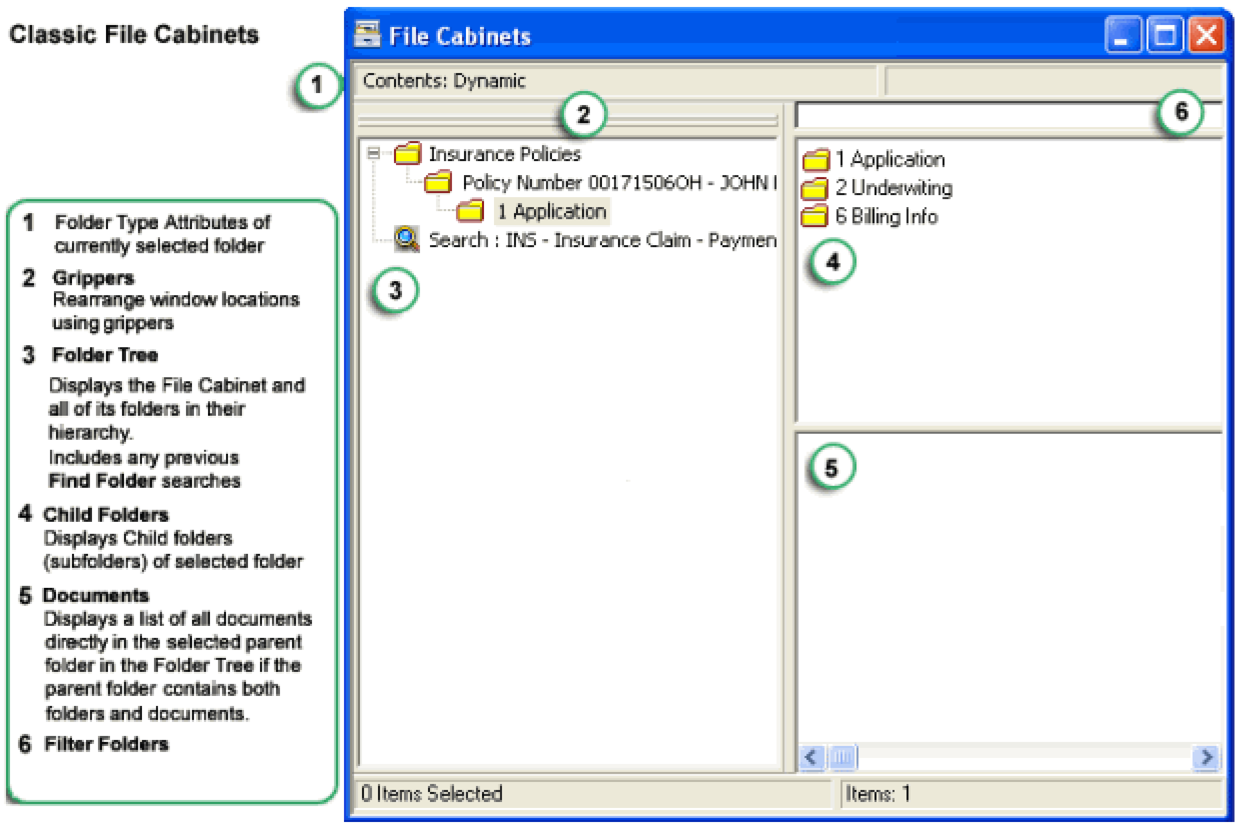
Note: The **Folder Tree** and **Documents** panes are integral to folder usability. If either of these panes is closed when you close the File Cabinets window, then the window is automatically restored to its default display the next time you open it.

Note: If you open a folder document and close all the panes, then you cannot access the panes or the restore option from the right-click menu; only the document's right-click options are available. To restore the default display, close and re-open the File Cabinets window.

Classic File Cabinets Window

1. To use the classic File Cabinets window in the OnBase Client, select **User | User Options**.
2. On the **General** tab, select **Classic File Cabinets Window**.
3. Click **OK**. The change takes effect when you open a new File Cabinets window.

Note: Only one classic File Cabinets window can be opened at a time.



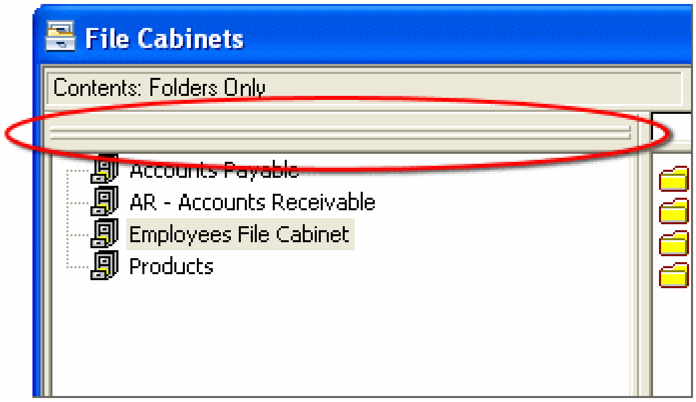
Open a Folder and View Documents

1. Double-click a folder to open it. Folders can contain additional folders and/or documents.
2. Continue opening folders until the correct folder is selected. The folder's contents are displayed in the right pane.

   If a folder contains additional folders and documents, the right pane is divided into two panes. The upper pane lists the folders in the selected folder. The lower pane lists documents in the selected folder.
3. Double-click a document to open it. To open multiple documents at once, CTRL+click each document. Then, right-click and select **View Selected**.

Change File Cabinets Window Appearance

Use the grippers to move or undock the **Folder Tree** pane from the classic File Cabinets window. Grippers are the horizontal bars displayed above the **Folder Tree** pane.



1. Ensure the grippers are displayed. To display the grippers, click the icon in the upper-left corner of the File Cabinets window and select **Toggle Grippers**.
2. Click and drag the grippers to move the **Folder Tree** pane to a new location:
   - Drag it out of the File Cabinets window to undock it.
   - Drag it to a new, docked location within the File Cabinets window.

   When dragged to an undocked position, the pane has a thick gray outline. When dragged to a docked position, the pane has a thin black outline.

Tip: Press **CTRL** as you drag if you want to undock the pane. To undock the pane without pressing **CTRL**, you must drag the pane away from the File Cabinets window. By pressing **CTRL**, you can undock the pane anywhere over the File Cabinets window.

Folder Search

You can search for folders in OnBase using the File Cabinets window.

Folder searching varies depending on whether you are using the classic or advanced File Cabinets window.

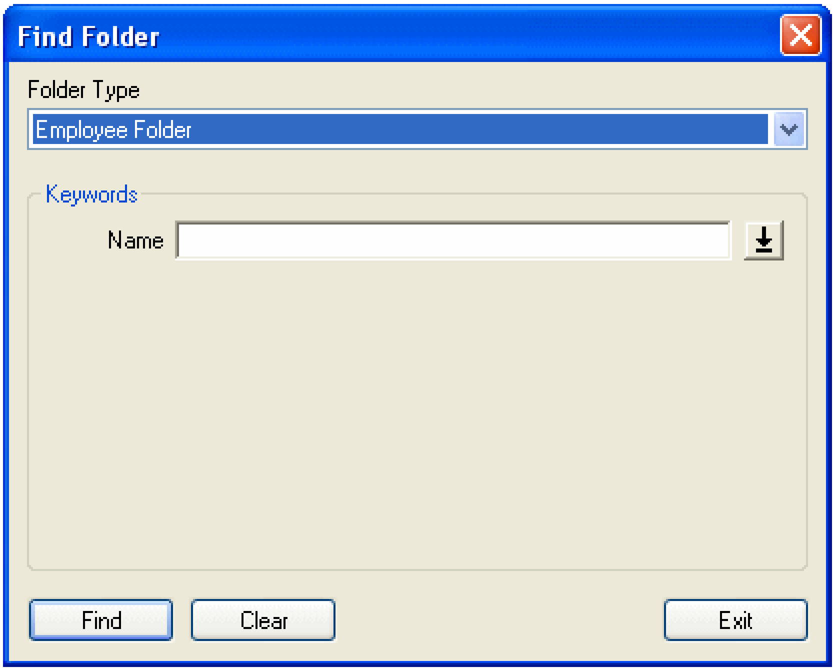
- Folder Search Using the Advanced File Cabinets Window on page 227
- Folder Search Using the Classic File Cabinets Window on page 229.

Tip: If Folder Type Custom Queries are available in your system, you can retrieve folders across multiple Folder Types using the Custom Queries window. See Folder Type Custom Queries on page 230 for more information.

Folder Search Using the Advanced File Cabinets Window

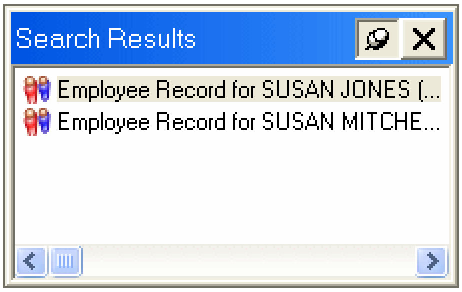
1. Open the File Cabinets window:
   - Click the **Open File Cabinets** button from the main Client toolbar.
   - Select **File | Open | File Cabinets**.
2. Click the **Find Folder** button, or right-click the **Documents** or **Child Folders** pane and select **Find Folder**.

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



3. Select the Folder Type.

4. Enter Keyword Values to narrow your search.
   - If a Folder Type requires a Keyword Value for searching, the required Keyword Type is displayed in red.
   - To add another instance of an individual Keyword Type, double-click the Keyword Type's name or press **F6**.
   - If the folder uses a Multi-Instance Keyword Type Group, the Keyword Type fields are in a collapsed state. Expand them by clicking the symbol to the left of the Keyword Type Group's name or by pressing **Ctrl + O**. To add another instance of the Keyword Type Group, double-click the Keyword Type Group's name.
5. Click **Find**.
   - OnBase returns all matching folders that you have rights to view, regardless of the associated file cabinet. The results of a folder search are displayed in the **Search Results** pane, which replaces the **Child Folders** pane.

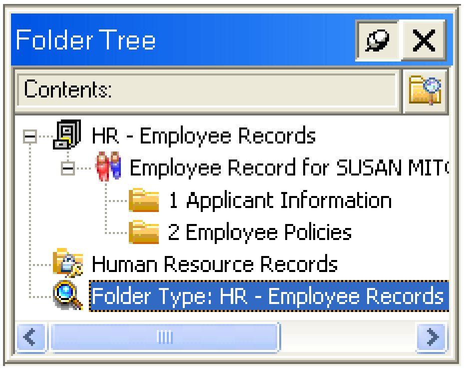


   - If only one folder matches the search criteria, it is opened automatically.

Note: A search may return the same folder multiple times if the folder is indexed with multiple instances of a Keyword Type Group and each instance has the same value for a Keyword Type used in your search.

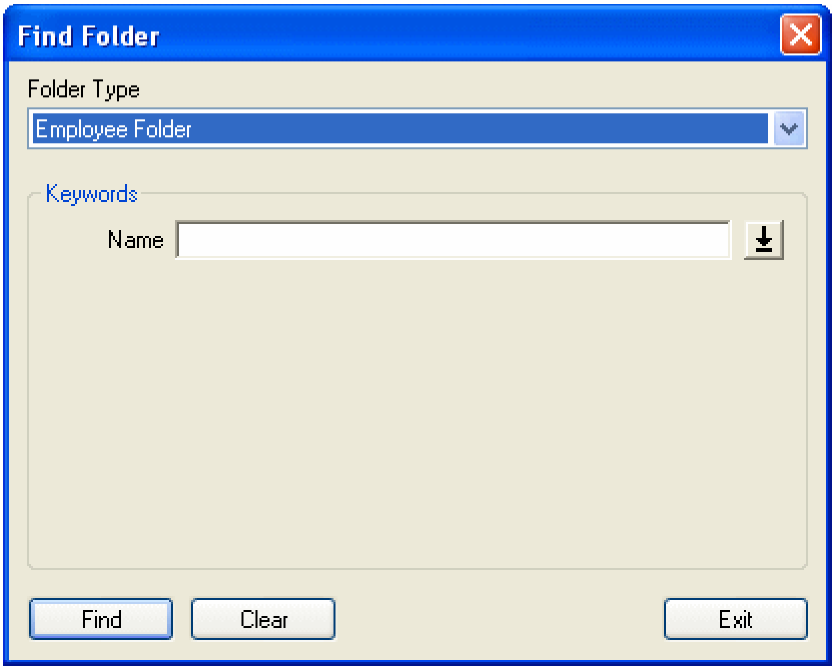
6. Double-click a folder to view its contents. The **Folder Tree** pane displays the folder's location.
7. Each subsequent search is added to the **Folder Tree** pane and remains there as long as the File Cabinets window is open.

   To remove a selected search from the File Cabinets window, right-click it and select **Remove From List**. This option works only for searches with multiple results. If only one folder was returned, selecting the search takes you immediately to the folder.



Folder Search Using the Classic File Cabinets Window

1. Open the File Cabinets window:
   - Click the **Open File Cabinets** button from the main Client toolbar, or
   - Select **File | Open | File Cabinets**.
2. Right-click the **Documents** or **Child Folders** pane and select **Find Folder**.
3. Select the Folder Type from the **Find Folder** dialog box.



4. Enter Keyword Values to narrow your search.
   - If a Folder Type requires a Keyword Value for searching, the required Keyword Type is displayed in red.
   - To add another instance of an individual Keyword Type, double-click the Keyword Type's name or press **F6**.
   - If the folder uses a Multi-Instance Keyword Type Group, the Keyword Type fields are in a collapsed state. Expand them by clicking the symbol to the left of the Keyword Type Group's name or by pressing **Ctrl + O**. To add another instance of the Keyword Type Group, double-click the Keyword Type Group's name.
5. Click **Find**. OnBase returns all matching folders that you have rights to view, regardless of the associated file cabinet. The results of a folder search are displayed on the right side of the **File Cabinets** window.

Note: A search may return the same folder multiple times if the folder is indexed with multiple instances of a Keyword Type Group and each instance has the same value for a Keyword Type used in your search.

6. Double-click a folder to view its contents. The folder tree displays the folder's location.

Folder Type Custom Queries

Folder Type Custom Queries work like other Custom Queries, except they retrieve folders rather than documents.

When a Custom Query is used for folder retrieval, the results list displays all folders satisfying the search criteria. A folder may be listed multiple times if it has more than one value for a Keyword Type that is used as a display column.

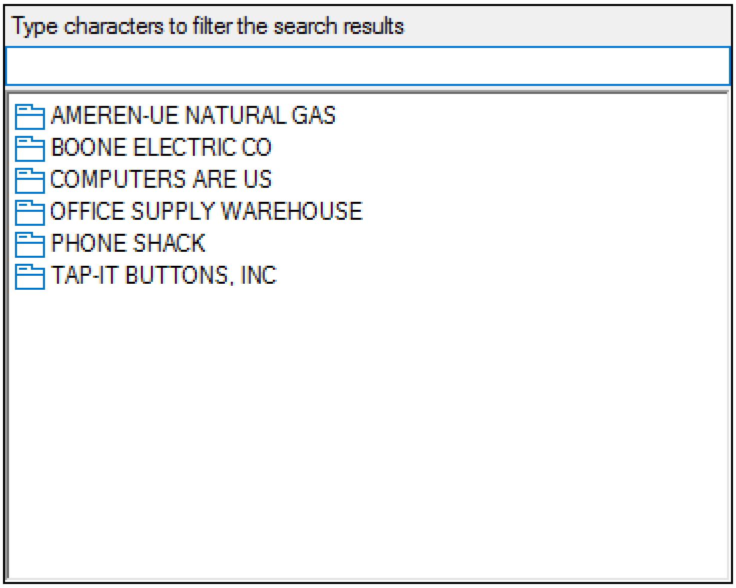
The right-click options available for folder search results allow you to perform folder-related tasks, such as viewing folder Keyword Values or printing folder contents. To open a folder in the File Cabinets window, double-click it from the list. If only one folder is returned, the File Cabinets window opens the folder automatically.

Note: If you are using the classic File Cabinets window, the File Cabinets window is opened, but the folder is not automatically displayed. To change this behavior, clear the **Classic File Cabinets Window** option in your **User Options**.

For general information about using Custom Queries, see the **Working With Custom Queries** topic in the OnBase Client help.

Working with Folder Pop-up Lists

Upon selecting a folder or file cabinet from the advanced File Cabinets window, you may see a pop-up list displaying child folders of the selected folder. You can filter, use right-click options on, and open folders in this list.



1. To filter the folder list, type characters in the filter bar above the list.

   For example, to find folders for a customer whose name begins with P, type **P**.

   The filter bar may be prepopulated with the static characters in the child folders' Auto-Names, depending on the selected Folder Type. This feature is useful when all child folder Auto-Names start with the same prefix or description. Characters that can vary in the folders' Auto-Names, such as the folder date, are not prepopulated.

Note: If no folders are displayed, begin typing the name of the folder you need. The text above the filter bar indicates the number of characters required (excluding prepopulated static characters) before folders are displayed. After you've typed the number of characters required, OnBase displays all folders matching your criteria. The minimum number of characters required is configured by your system administrator.

2. Double-click a folder to open it. The folder is added to the **Folder Tree** pane.

   The following icon is also displayed in the **Folder Tree** pane under the parent folder. This icon indicates that the parent folder contains more folders that are not currently displayed.

    ...

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

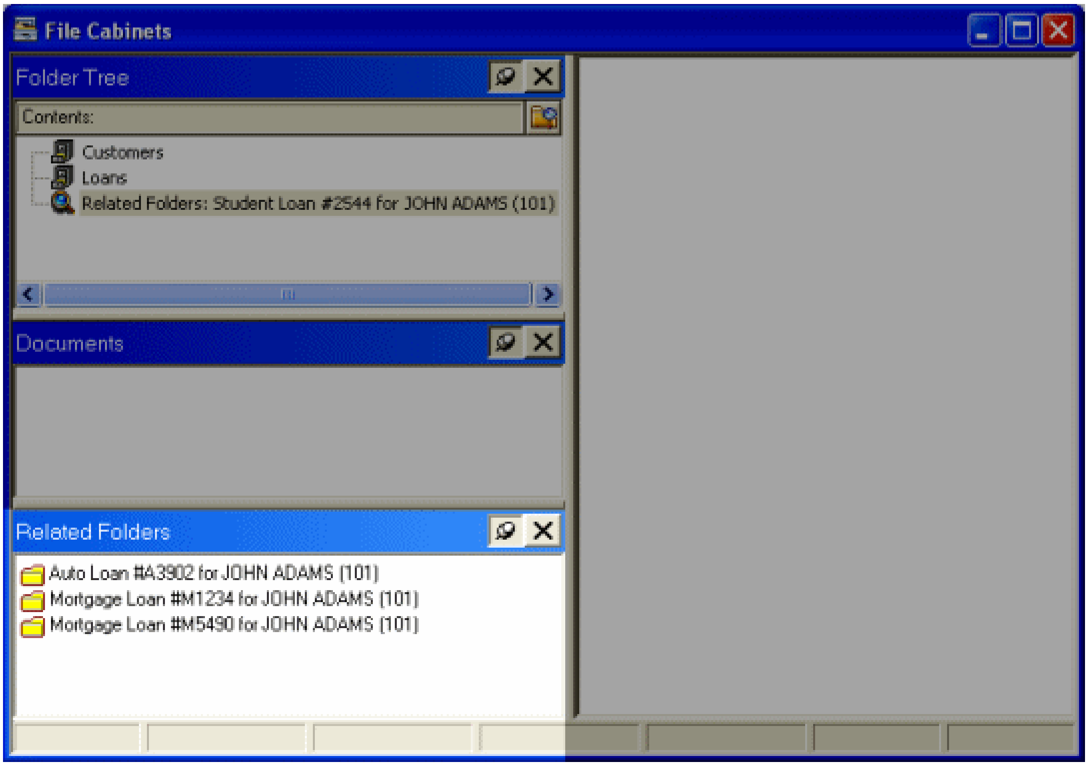
4. Folders opened from a pop-up list can be removed from the **Folder Tree** pane without deleting the folder from OnBase. Select the folder that you no longer need to view, right-click, and select **Remove From List**. The folder is removed from the **Folder Tree** pane. You can retrieve the folder again from the pop-up list, if necessary.

Retrieving Related Folders

If configured, related folders allow you to quickly access related information stored in different branches of the folder tree. Related folders and their availability vary per system. See your system administrator for information about your system's folder configuration.

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

1. Select a folder in the **Folder Tree** or **Child Folders** pane.
2. Any related folders are listed in the **Related Folders** pane of the **File Cabinets** window.



Creating Folders in the Client

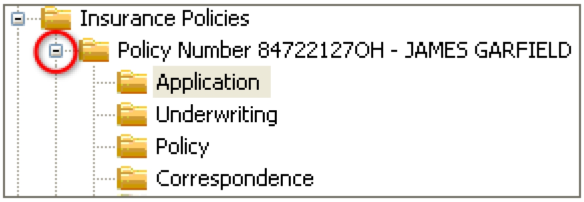
If you have sufficient privileges, you can manually create folders within a file cabinet or another folder in the OnBase Client.

Under some conditions, you may be unable to create a folder. For more information, see If You Cannot Create a Folder on page 236.

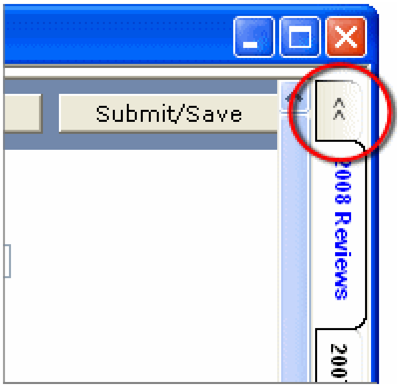
To create a new folder:

1. Open the File Cabinets window using either of the following methods:
   - Click the **Open File Cabinets** button from the main Client toolbar.
   - Select **File | Open | File Cabinets**.
2. Select the folder or file cabinet where the new folder should reside.

   When you select a folder, its first child folder may be automatically selected. To select only the parent folder, do the following:
   - Collapse the folder by clicking the **-** symbol to the left of its name.



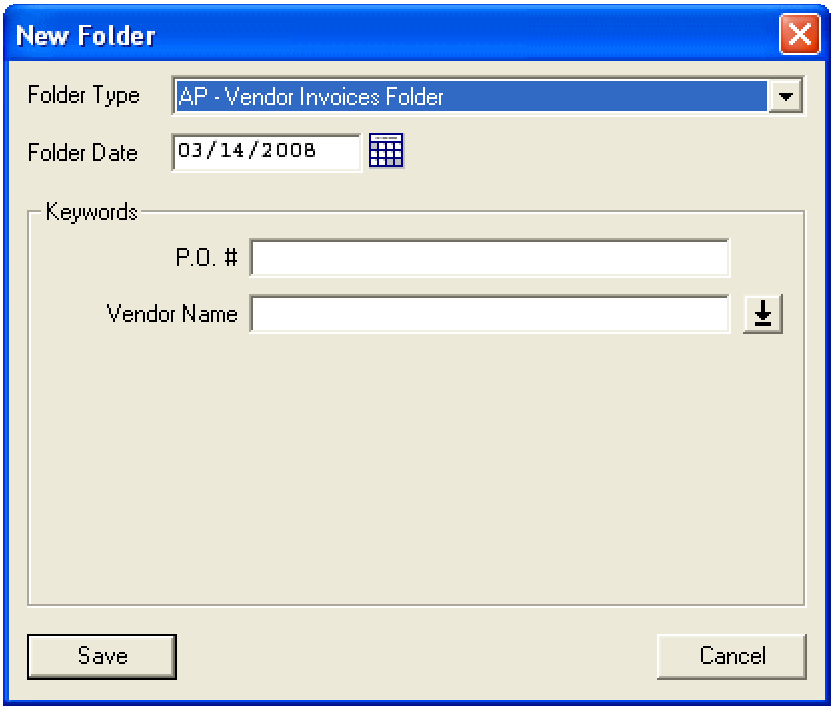
   - If applicable, click the up-level tab located above the tabs displayed in the File Cabinets window. This tab is available when both the current folder and the parent folder are displayed as tabs.



3. Right-click in the **Documents** or **Child Folders** pane and select **New Folder**. If this option is unavailable, the file cabinet or folder may not allow you to create child folders, or you may lack folder creation privileges.

4. Select the Folder Type for the new folder.

   The Folder Type determines the configuration options for a folder, including its Keyword Types and whether the folder is static or dynamic. For information about your system's Folder Types, contact your system administrator.



5. Enter the Keyword Values for the new folder. The following features may facilitate folder indexing:
   - Keyword Type drop-down lists
   - Cascading Data Sets
   - F6 Keyword Type duplication
   - Multi-Instance Keyword Type Groups
   - AutoFill Keyword Sets
   - Required Keyword Types.

   When you create a new child folder, it inherits default Keyword Values from the parent folder. Change these values as needed. You can also change the **Folder Date** to have the folder's date to match the date of its contents.

Note: Dates in folder names may be based on the Folder Date, which you can change, or the folder's creation date, which you cannot change. Folders that use date ranges—by month or year, for example—must have the correct Folder Date entered when the folder is created. You cannot change a date range on a folder after it has been saved.

6. Click **Save** when finished. The folder is available in the folder tree. If the Folder Type is set up to auto-create child folders, the folder and its child folders are available.

If You Cannot Create a Folder

Your ability to create folders depends on your user privileges, the type of folder you want to create, and whether a folder already exists.

The **New Folder** option is unavailable for folders that do not allow child folders to be manually created. In addition, some folders may allow you to create only child folders based on a specific Folder Type. This restriction ensures a folder contains only child folders that belong there.

To prevent duplicate folder creation, OnBase prohibits you from creating folders with the same indexing information as an existing folder. You cannot create a child folder that has the same Folder Type and Keyword Values as another child folder within the same parent folder.

Child folders can have the same Folder Type and Keyword Values only if they reside within different parent folders or if they are date-based folders that have different date ranges. For example, if two child folders use a monthly date range, and their Folder Dates are from different months, then the child folders can have identical Keyword Values and reside within the same parent folder. For information about how your folder system is set up, see your system administrator.

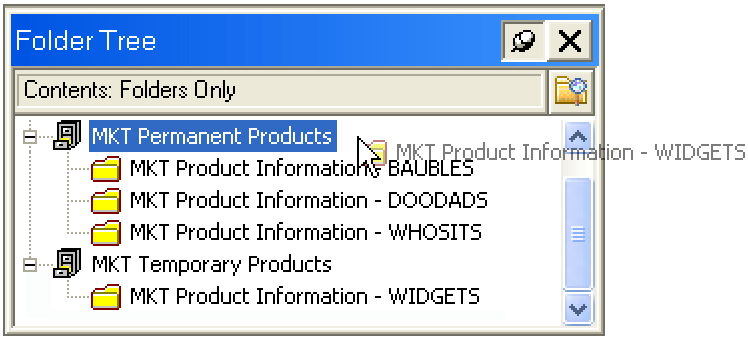
Moving Folders in the Client

Depending on your system's configuration, some Folder Types may let you move folders from one parent folder to another. Movable folders offer the flexibility to change how a folder and its contents are classified in your folder system. When you move a folder to a new parent folder, OnBase can update Keyword Values on the moved folder and its contents. For a description of when and how Keyword Values are updated, read the Keyword Value Update Rules for Moved Folders on page 238.

Under some conditions, you may be unable to move a folder. For more information, see If You Cannot Move a Folder on page 237.

1. Open the new parent folder (where you are moving a folder to) in the **Folder Tree** pane of the advanced File Cabinets window. This ensures you can access the folder in a later step.
2. Select the folder you want to move in the **Folder Tree** pane.
3. From the **Folder Tree** pane, place your pointer over the folder you want to move and hold down the right mouse button.

4. Keeping the right mouse button pressed, drag the selected folder to its new parent folder. If the folder you selected can be copied or moved, OnBase displays the folder under your pointer as you drag it.



- To scroll up to a folder, rest your pointer on the folder or file cabinet at the top of the **Folder Tree** pane.
- To scroll down, rest your pointer on the folder or file cabinet at the bottom of the **Folder Tree** pane.
- To open a collapsed folder, rest your pointer over it. This feature works only if you have previously opened the collapsed folder.

5. When the new parent folder is selected, release the right mouse button.
6. Select **Move Here** to confirm the move. To cancel moving the folder, select **Cancel**.

   If OnBase won't let you move the folder, see If You Cannot Move a Folder on page 237 to verify whether all requirements are met.

   When you move a folder, you may be prompted to confirm that you want to continue. OnBase asks for confirmation under these conditions:

   - The move and Keyword update operation will take longer than three seconds.
   - The moved folder or new parent folder have multiple or blank values for any of the common parent Keyword Types. Under these conditions, no values will be updated.

   For more information about how Keyword Values are updated, see Keyword Value Update Rules for Moved Folders on page 238.

If You Cannot Move a Folder

You may be unable to move a folder under any of the following conditions:

- You have insufficient privileges to move the folder.
- The folder's Folder Type is not movable.

  Contact your system administrator for information about which folders are movable.
- Another user is currently modifying the folder you want to move.
- Another user is modifying the contents of the folder you want to move. This condition can prevent you from moving a folder if the original parent folder and the new parent folder are based on the same Folder Type.
- The new parent folder doesn't let you add folders due to a configuration setting.

  Some parent folders may only let you add folders of specific Folder Types, and others may prevent you from adding any child folders.

- The new parent folder contains a matching folder.

  If the folder being moved will have the same Keyword Values and Folder Type as another folder within the new parent, you cannot move the folder to that parent. This restriction prevents the creation of duplicate folders. OnBase takes into account whether Keyword Values will be updated on the moved folder before restricting the move.

Note: When you move a folder that resides in a parent folder for folder notes, any bookmarks referencing the moved folder are broken. The bookmark remains in the original parent folder, but clicking the bookmark's **Go to Page** button results in an error stating that the referenced item could not be found. If you move a parent folder for folder notes, then all folder notes remain intact and are moved with the parent.

Folders can be moved only in the OnBase Client. You cannot move folders in the OnBase Web Client or Unity Client.

Keyword Value Update Rules for Moved Folders

OnBase uses the following rules to update Keyword Values on a moved folder and its contents:

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

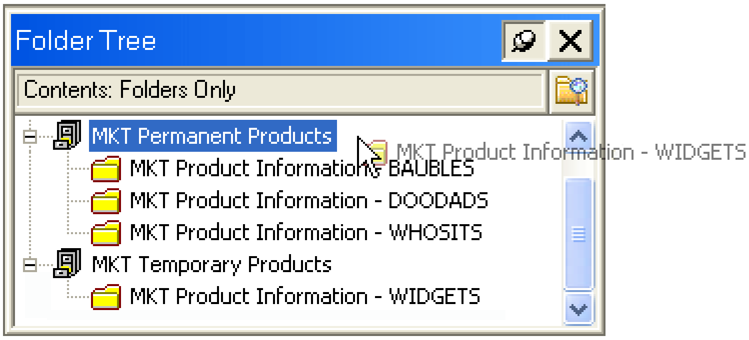
Copying Folders in the Client

Depending on your system's configuration, some Folder Types may let you copy folders from one parent folder to another. Copyable folders let you quickly create duplicate records of data in your folder system while maintaining only one set of documents. All Keyword Values from the original folders are replicated on the copies.

Under some conditions, you may be unable to copy a folder. For more information, see If You Cannot Copy a Folder on page 239.

1. Open the folder where you want to add copied folders in the **Folder Tree** pane of the advanced File Cabinets window. This ensures you can access the folder in a later step.
2. Select the folder you want to copy in the **Folder Tree** pane.
3. From the **Folder Tree** pane, place your pointer over the folder you want to copy and hold down the right mouse button.

4. Keeping the right mouse button pressed, drag the selected folder to the folder you opened in step 1. If the folder you selected can be copied or moved, OnBase displays the folder under your pointer as you drag it.



- To scroll up to a folder, rest your pointer on the folder or file cabinet at the top of the **Folder Tree** pane.
- To scroll down, rest your pointer on the folder or file cabinet at the bottom of the **Folder Tree** pane.
- To open a collapsed folder, rest your pointer over it. This feature works only if you have previously opened the collapsed folder.

5. When the correct parent folder is selected, release the right mouse button.
6. Select **Copy Here** to copy the folder. To cancel copying, select **Cancel**.

   If OnBase won't let you copy the folder, see If You Cannot Copy a Folder on page 239 to verify whether all requirements are met.

If You Cannot Copy a Folder

You may be unable to copy a folder under any of the following conditions:

- You have insufficient privileges to copy the folder.
- The folder's Folder Type is not copyable.

  Contact your system administrator for information about which folders are copyable.
- Other users are currently modifying the folder you want to copy.
- The new parent folder doesn't let you add folders due to a configuration setting.

  Some parent folders may only let you add folders of specific Folder Types, and others may prevent you from adding any child folders.
- The new parent folder contains a matching folder.

  If the folder being copied has the same Keyword Values and Folder Type as another folder within the new parent folder, you cannot copy the folder to that parent. This restriction prevents the creation of duplicate folders.

Folders can be copied only in the OnBase Client. You cannot copy folders in the OnBase Web Client.

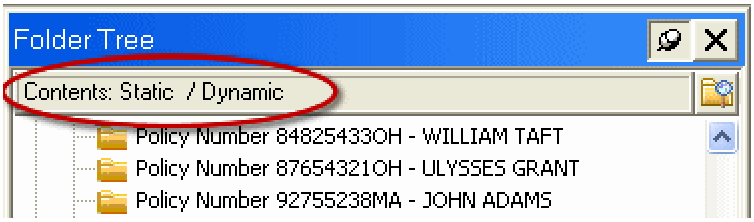
Adding and Removing Documents

The following topics describe how to manage folder contents by adding or removing documents.

Adding Documents to Folders

Users with sufficient privileges can add OnBase documents to a static folder by dragging the documents to the File Cabinets window. A single document can reside in multiple folders, because folders contain pointers to documents rather than actual copies.

1. Open the destination folder in the **Folder Tree** pane. Ensure the **Contents** bar above the pane says either **Static** or **Static / Dynamic**. Documents can be manually added only to folders that allow static contents.



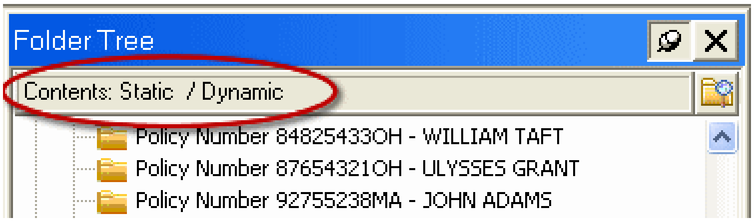
2. From an open document or from a list with one or more documents selected, press and hold the right mouse button to hook the document(s).
3. Drag the document(s) to the File Cabinets window and release the mouse button. The **Documents** pane displays the added document(s).

Note: You may be unable to manually add documents to any folders. You cannot manually add documents to dynamic folders, because their contents are dynamically determined based on Keyword Values. See your system administrator for information about static and dynamic Folder Types.

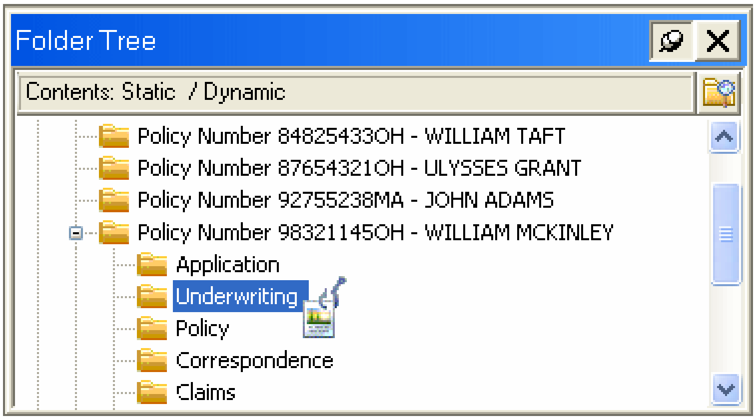
Copying or Moving Documents to Folders

You can organize folder contents by moving and copying documents to and from static folders.

1. From the advanced File Cabinets window, open the folder where you want to add documents.
2. Ensure the **Contents** bar above the folder tree says either **Static** or **Static / Dynamic**. Documents can be manually added only to folders that allow static contents.



3. Open the folder containing the document(s) you want to move or copy.
4. Select the document(s) you want to move or copy. To select multiple documents, press **CTRL** or **SHIFT** as you click them.
5. Press and hold the right mouse button to hook the documents.
6. Keeping the right mouse button pressed, drag the selected document(s) to the folder opened in step 1.



- To scroll up to the folder, rest your pointer on the folder or file cabinet at the top of the **Folder Tree** pane.
- To scroll down, rest your pointer on the folder or file cabinet at the bottom of the **Folder Tree** pane.
- To open a collapsed folder, rest your pointer over it. This feature works only if you have previously opened the collapsed folder.

7. When the folder is selected, release the right mouse button. If the documents' original folder allows static contents, OnBase presents options to move or copy the documents.
   - Select **Copy Here** to copy the documents to the selected folder. When a document is copied, each folder links to a single copy of the document in OnBase. If the document is modified in one location, the change is reflected in all locations.
   - Select **Move Here** to add the documents to the selected folder and remove them from the original folder.
   - Select **Cancel** if you do not want to move or copy the documents to the selected folder.

   If these options are not presented, you may have insufficient rights to remove documents from the original folder, or the original folder is dynamic and the documents cannot be removed from it. The documents are still added to the selected folder if it allows documents to reside in it statically.

Note: You may be unable to move or copy a document if you have insufficient privileges to add documents to the target folder, if the target folder does not allow documents to reside in it statically, or if the document already resides in the target folder. In addition, documents cannot be added to folders that are currently being modified.

Importing Documents Using Folders

You can simultaneously import a document into OnBase and add it to a selected folder by dragging and dropping the document into the **Documents** pane. This process also automatically indexes the document with Keyword Values from the folder.

For more information, see Automatically Index Documents Using Folders on page 244.

Removing Documents from Folders

The following procedure removes documents from a folder without removing them from OnBase. Removed documents remain accessible through standard retrieval methods, such as the **Document Retrieval** dialog box. To delete foldered documents from OnBase, see Deleting Folders and Documents in a Folder on page 243.

The following limitations apply to removing documents from folders:

- If the folder is configured as dynamic, the **Remove From Folder** option is not available.
- You cannot remove a Certificate of Destruction from a folder. For more information on Certificates of Destruction, see the **Records Management** module reference guide.
- If a Folder Type is configured to **Include Child Folder Static Contents**, you can only remove a document in a child folder from the folder it was added to, not from the parent folder.

To remove documents from a folder:

1. Select one or more documents in the folder.
2. Perform either of the following actions:
   - Right-click and drag the documents to the Client module desktop.
   - Right-click and select **Remove From Folder**.
3. Confirm the removal, when prompted.

Deleting Folders and Documents in a Folder

The following topics describe how to delete folders and their contents from OnBase. To remove a document from a folder without deleting it from OnBase, see Removing Documents from Folders on page 242.

Deleting Documents from Both a Folder and OnBase

To delete a document from OnBase:

1. Right-click the document and select **Delete**.
2. OnBase displays a warning message, indicating that the delete operation will remove data. To confirm deletion, click **Yes**. To cancel deletion, click **No**.

   The document is deleted from the folder and OnBase. The document is no longer accessible from the **Document Retrieval** dialog box. Deleted documents are sent to Document Maintenance until they are permanently purged by the system administrator.

Deleting Folders

You can delete folders by using a right-click option. Deleting a folder does not remove its documents from OnBase. The documents remain available from other Document Retrieval methods.

To delete a folder, you must have sufficient privileges to the folder and its child folders. If you attempt to delete a folder containing a child folder that you lack privileges to delete, you cannot delete the parent folder or the restricted child folder(s). Child folders that you have privileges to delete are deleted.

Note: Deleted folders can only be restored from Folder Maintenance by your system administrator.

1. Right-click a folder and select **Delete**. This removes the folder, its child folders, and documents from the file cabinet.
2. OnBase displays a warning message, indicating that the delete operation will remove data. To confirm deletion, click **Yes**. To cancel deletion, click **No**.

Caution: Purging a batch process that was auto-foldered purges the empty folders created by the process—they are not sent to Folder Maintenance. Likewise, deleting a file cabinet purges all of the child folders, if the child folders are allowed to be deleted. The child folders are not sent to Folder Maintenance.

Automatically Index Documents Using Folders

1. Open the appropriate folder.

Note: To create a folder, see Creating Folders in the Client on page 234.

2. Right-click the folder and select **Keywords** to check the Keyword Values assigned to the folder. Enter Keyword Values for the folder, if necessary.
3. Ensure the correct folder is selected in the **Folder Tree** pane.
4. Select a file to import from outside of OnBase.
5. Drag and drop the file to the folder in the **Folder Tree** pane, to the **Documents** pane, or to the **Child Folders** pane. The **Import Document** dialog box is displayed.

Note: Even if a different folder is selected in the **Child Folders** pane, the document will be imported into the folder selected in the **Folder Tree** pane.

6. Select the appropriate Document Type and any other selections.
   - If the folder is dynamic, only Document Types assigned to the Folder Type are available.
   - If no Document Types are available, then you do not have privileges to any Document Type assigned to this Folder Type. In this situation, you can import the document into OnBase, but it will not be placed in the folder.
7. Any Keyword Types shared with the folder are populated with the folder's corresponding Keyword Values.

   If the folder contains the Primary Keyword Value of an AutoFill Keyword Set that is assigned to the Document Type, its Secondary Keyword Values also are automatically populated.
8. Click **Import**. The document is imported.

Note: To drag and drop multiple files to be queued for import, you must be licensed for EDM Services.

Filtering the View of Available Folders

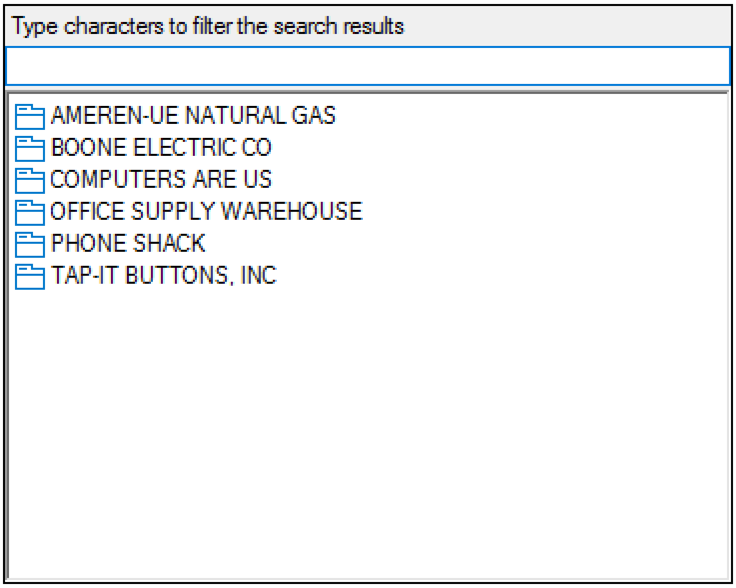
When working with folders in the OnBase Client, you can filter a folder's contents to display only the child folders necessary for the current task.

The steps to filter folders vary depending on whether you are using the classic or advanced File Cabinets window. For the advanced File Cabinets window, see the following procedure. For the classic File Cabinets window, see Classic File Cabinets Window on page 225.

Advanced File Cabinets Window

From the advanced File Cabinets window, you can filter child folders displayed in a pop-up list. Your system administrator determines whether folders display child folders in a pop-up list.

1. From the File Cabinets window, click a file cabinet to display its folders in the **Child Folders** pane.
2. Open the folder configured to display child folders in a pop-up list.

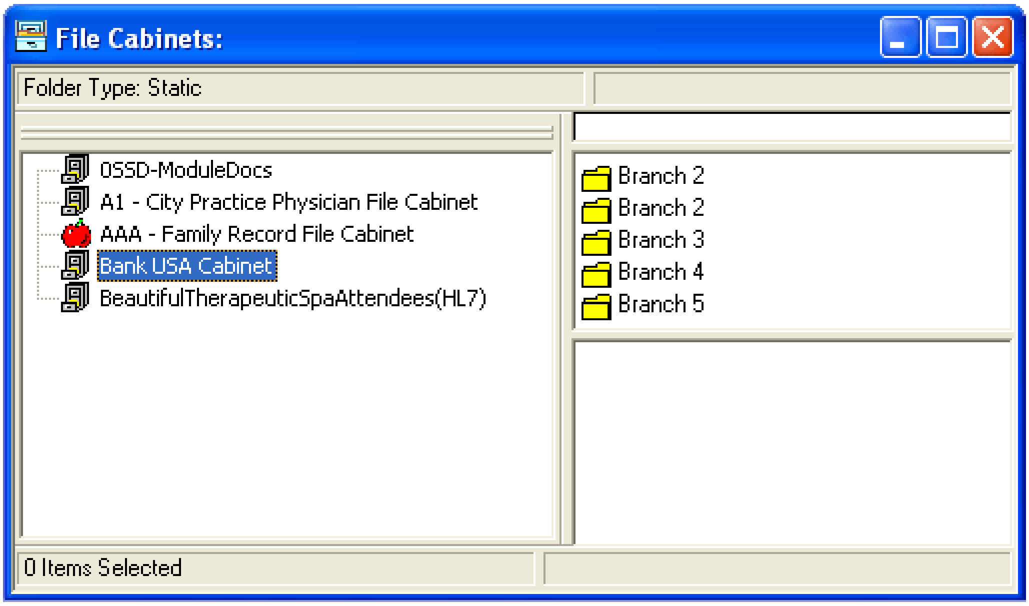


3. Type the first characters in the folder’s name in the filter bar at the top of the pop-up list. The list is filtered according to the characters you enter.

   For example, if every folder name begins with CA or NY, you could type NY to only see folders that begin with NY.

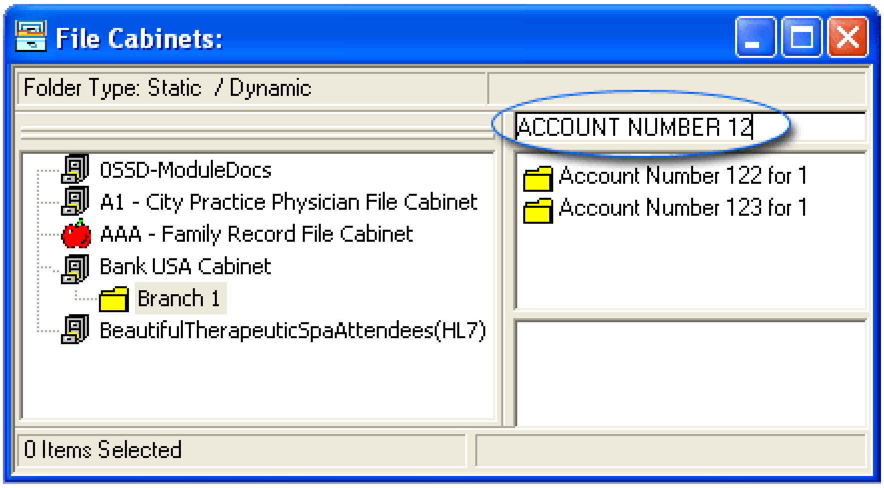
Classic File Cabinets Window

1. From the File Cabinets window, click a file cabinet to display its folder contents in the right pane.

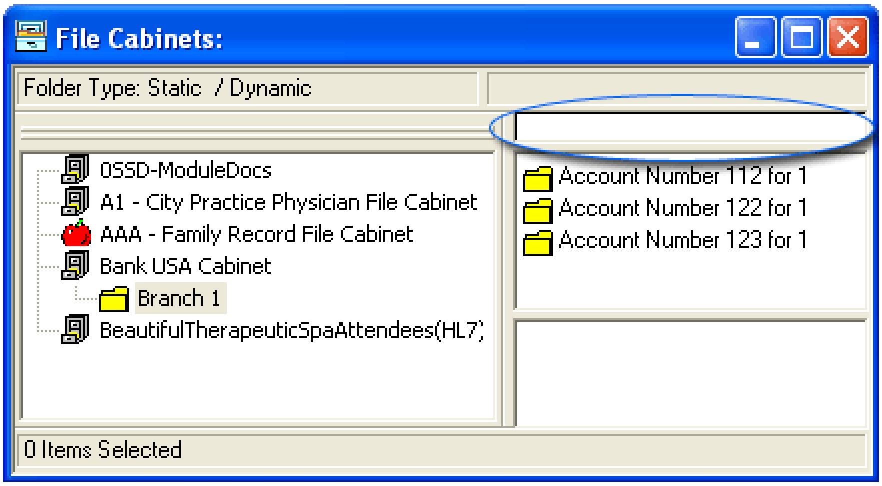


2. Type characters in the filter field to display only folders that begin with those characters. 150 characters are permitted.

   For example, to view only checking account files for customers whose Account Numbers start with 12, you could type Account Number 12 in the filter field. OnBase displays only folders with matching Account Numbers.



   If nothing is typed, all folders are displayed.



Note: Folders are filtered for the current session only. Once the File Cabinets window is closed, the filter field resets. See Applying a Folder Template on page 248 for additional filtering capabilities.

Applying a Folder Template

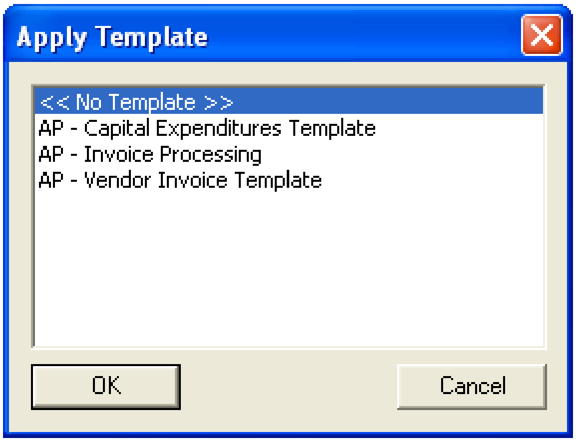
Folder templates help you navigate a folder's contents by doing the following:

- Filtering the view of folder contents when you open the folder. A template can be configured to display documents in a certain order by Document Type, or to display only documents of a certain Document Type by default.
- Providing a visual indicator of documents missing from the folder. For example, if a Patient Information folder is supposed to contain the patient's Driver's License, a folder template may display an error message if the Driver's License Document Type is missing from the folder.
- Identifying whether documents are missing certain Keyword Values, which may have been unavailable when the documents were indexed.
- Sorting documents so they are displayed in a consistent sequence.

Note: For additional information on using the advanced or classic File Cabinets window, see Advanced File Cabinets Window on page 214 or Classic File Cabinets Window on page 225.

To apply or remove a template:

1. Right-click anywhere within the **Documents** pane and select **Template**.
   The **Apply Template** dialog box is displayed.



2. Select a template. If the folder has a template applied and you want to remove it, select **<<No Template>>** to display all the contents of the folder. Contents are displayed according to the configured Document Type order of the folder.

Note: Depending on the template configuration, all contents of the folder may be displayed when a template is applied. If this is the case, template documents are displayed first, followed by documents that do not meet the template criteria.

3. Click **Apply**.
   The **Documents** pane displays any applicable documents or information.

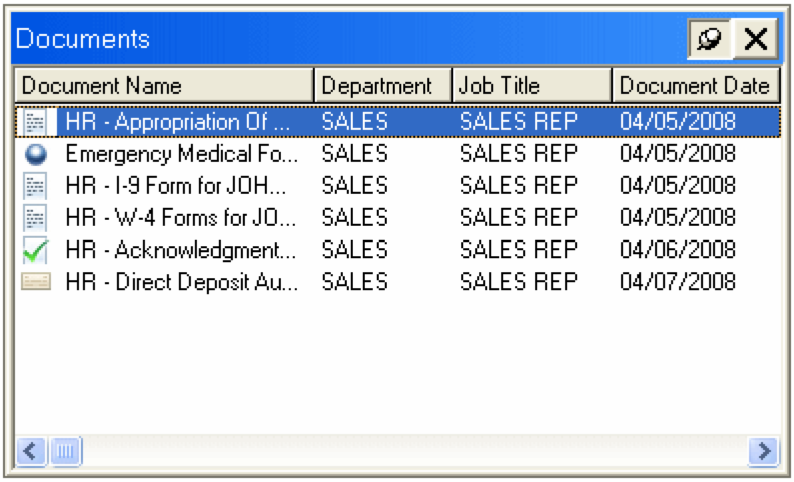
Note: A folder template and a folder filter cannot be applied to a folder simultaneously. If you apply a filter to a folder with a template applied, the template is removed before the filter is applied. If you apply a template to a folder with a filter applied, the filter is removed before the template is applied.

Applying Folder Filters

Note: Users without rights to certain filters will not see those filters displayed.

You can filter and sort documents in a folder using folder filters. Folder filters let you perform the following tasks:

- Organize and sort documents by Keyword Value, name, or date. Filters display information about each document in columns that you can use for sorting.
- Display only documents that have a specific Keyword Value. Filters that use forms let you filter the documents by submitting Keyword Values on the form.
- Display only documents within a subset of Document Types. For example, you may have a dynamic folder with multiple Document Types assigned to it, but you need quick access only to specific Document Types on a regular basis.



Note: Folder filters are available from the advanced File Cabinets window in the OnBase Client, the Web Client Folders window, and the Unity Client File Cabinets layout. They are not available from the classic File Cabinets window.

Filters are similar to another function of folders called folder templates. Both can display a subset of documents within a folder, but templates and filters perform different tasks. When choosing between a filter or template, consider what you want to accomplish. Whereas folder templates help ensure that a folder has a complete set of documents, folder filters let you quickly see information about documents organized in sortable columns.

Note: Folder filters are not available for Workflow folders using the Classic Client interface for Workflow.

A folder template and a folder filter cannot be applied to a folder simultaneously. If you apply a filter to a folder with a template applied, the template is removed before the filter is applied. If you apply a template to a folder with a filter applied, the filter is removed before the template is applied.

Some folders may have a default filter applied when the folder is opened. When a filter is applied, the **Documents** pane is divided into columns with headers at the top of the pane. To determine which filter is applied, right-click within the **Documents** pane and select **Filter Documents**. The applied filter has a check mark next to its name. To remove the filter, select **<No Filter>** from the **Filter Documents** options. Removing the filter may be necessary to display all the documents in a folder.

To apply a folder filter:

1. Right-click within the **Documents** pane and select **Filter Documents**.
2. Select a filter.
3. If a form is displayed in a separate window, type the Keyword Values to filter the folder by, and submit the form.
4. To sort the filtered list of documents, click the header above the column you want to sort by.

   For example, if one column contains the **Document Date**, click the header to sort documents in ascending chronological order; click the header again to sort documents in descending chronological order.

Working With Folder Keywords

Users with sufficient privileges can modify Keyword Values on either a folder or on a folder and its contents.

- To modify Keyword Values assigned to a folder, see page 252.
- To modify Keyword Values assigned to a folder and its contents, including child folders and documents, see page 254.

Caution: Modifying Keyword Values on a folder and/or its documents may change the contents of dynamic folders. Ensure you understand the implications of modifying the Keyword Values before proceeding.

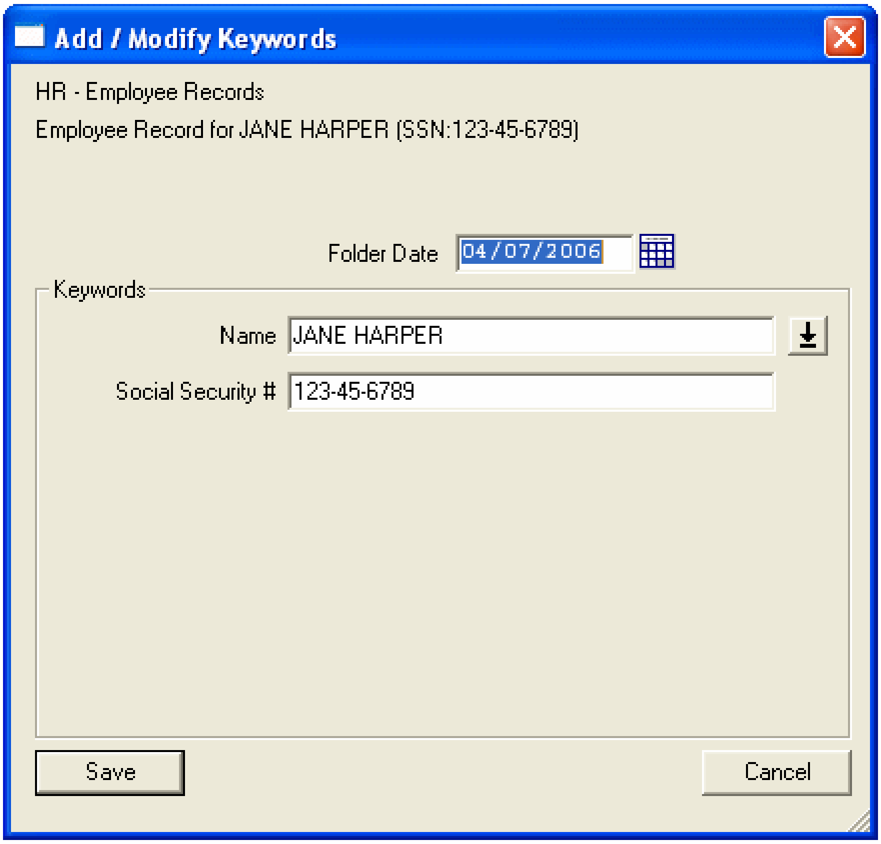
Tip: To determine whether a folder is dynamic or static, open it. When a folder is opened, the header above the **Folder Tree** pane displays whether the folder's contents are **Static** or **Dynamic**. This information is also provided in the folder's properties under **Contents**. See Folder Properties on page 267 for more information.

Modifying Keyword Values on a Folder Only

Do the following to modify Keyword Values on the folder only and not its contents.

1. Open the File Cabinets window.
2. Click a file cabinet to display its folder contents in the **Child Folders** pane.
3. From the **Child Folders** pane, select the folder and right-click.

4. Select **Keywords** to display the **Add/Modify Keywords** dialog box. The Keyword Values assigned to that folder are displayed.



Depending on your system's configuration, one or more values may be masked or read-only. Keyword Values may be read-only because another user or process is working with them, or because you lack privileges to modify them.

5. Modify the Keyword Values and click **Save**. For information about modifying Keyword Values, see the Viewing and Modifying Keywords topic in the Client help.
   - If your Folder Type is static, all documents that were in the folder will remain in the folder.
   - If your Folder Type is dynamic, only documents that contain Keyword Values assigned to the folder will remain in the folder. Your Keyword Value change may have added additional documents in the folder as well.
   - If your Folder Type is static and dynamic, all documents that were manually placed in the folder will remain in the folder. All documents that dynamically resided in the folder according to their Keyword Values will remain only if their Keyword Values are assigned to the folder. The Keyword Value change also may add documents to the folder.

Modifying Keyword Values on a Folder, Child Folders, and Documents

Throughout a business process, the Keyword Values associated with a folder or folder tree may change. To modify Keyword Values on all folders and documents in a folder tree, use the **Folder Contents | Keywords** right-click options.

You can modify only one Keyword Value at a time, which prevents folder contents from inheriting values for all of the folder's Keyword Types. If the folder uses Multi-Instance Keyword Type Groups, all values in a group can be modified simultaneously. For information about modifying Keyword Values in Multi-Instance Keyword Type Groups, see page 256.

Note: As a best practice, use the **Folder Contents | Keywords** options only when the folder and its contents use the same Keyword Types.

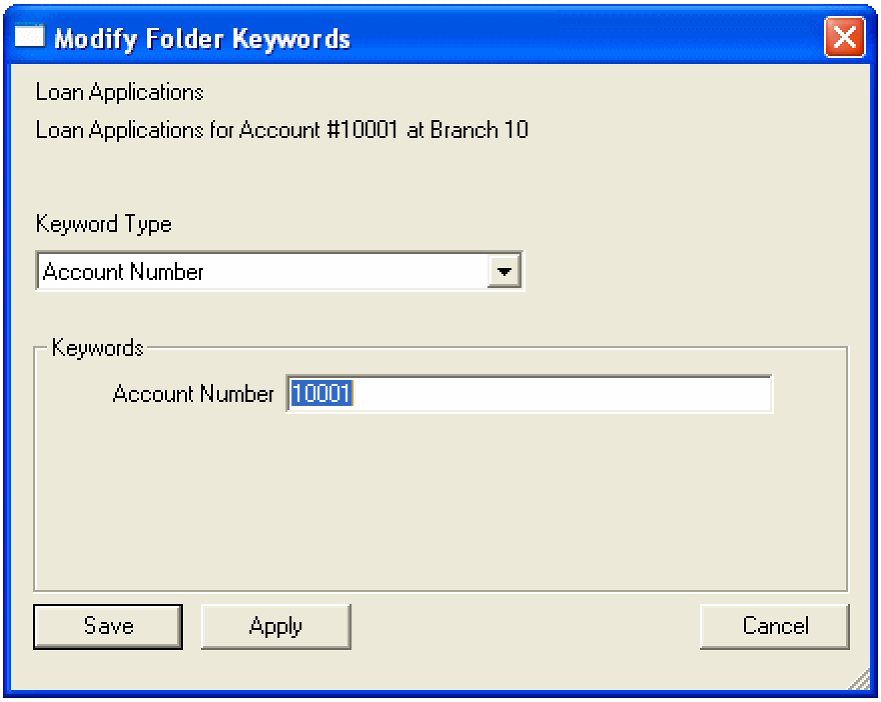
If you have insufficient privileges to modify Keyword Values on all of a folder's contents, values are modified only on child folders or documents you have privileges to modify. If you lack rights to modify Keyword Values on a folder, then no values are modified on the folder's contents.

To modify Keyword Values on a folder and its contents,

1. From the **File Cabinets** window, select the folder whose Keyword Values you want to modify.
2. Right-click and select one of the following options from the **Folder Contents | Keywords** menu:

Option	Description
Folders and Documents	Modifies the Keyword Values on the selected folder and any documents residing directly within that folder. Keyword Values on the folder's child folders and their documents are not modified.
Folders and Child Folders	Modifies the Keyword Values on the selected folder and its child folders. Keyword Values on documents residing within the folder or its child folders are not modified.
Folders, Child Folders, and Documents	Modifies the Keyword Values on the selected folder, its child folders, and any documents residing within the folder or its child folders.

The **Modify Folder Keywords** dialog box is displayed:



3. Select the Keyword Type to modify from the **Keyword Type** drop-down list.

   If the Keyword Type is in a Multi-Instance Keyword Type Group, you can modify values on all Keyword Types in the group.

Caution: Ensure you understand how modifying Multi-Instance Keyword Type Groups will affect Keyword values on folder contents. For more information, see Modifying Multi-Instance Keyword Type Groups on page 256.

4. Type the new value for the folder and the contents you selected in step 2. The selected contents will have the same number of instances of the Keyword Type and the same values for each instance.
   - If you add another instance of the Keyword Type (by pressing F6), the new instance and its Keyword Value is added to the folder and selected contents. If you remove an instance of a Keyword Value, the Keyword Value is removed from the folder and selected contents.
   - If the selected Keyword Type is part of a Cascading Data Set, changing the Keyword Value will not update the child values that depend on it. For example, if you change the **State** value, then the **City** Keyword Type will retain its current value on the folder and its contents. Be sure to update any child values on folders and documents as needed.
5. Do one of the following:
   - Click **Save** to save the modified Keyword Values and close the **Modify Folder Keywords** dialog box.
   - Click **Apply** to save the modified Keyword Values and keep the **Modify Folder Keywords** dialog box open to modify additional Keyword Values.
   - Click **Cancel** to cancel any changes that have not been applied.

Note: If you lack rights to modify Keyword Values on a folder or document, OnBase displays a message stating that some Keyword Values could not be modified. Click **Show Details** to view folders or documents whose Keyword Values were not modified. If a folder name is displayed, then neither the folder nor its contents will reflect your changes.

Modifying Multi-Instance Keyword Type Groups

If the folder or its contents use a Multi-Instance Keyword Type Group, ensure you understand how Multi-Instance Keyword Type Groups are affected before using the **Folder Contents | Keywords** options.

The following examples describe how the **Folder Contents | Keywords** options are applied when folders or contents use Multi-Instance Keyword Type Groups. The tables display examples of folder and content Keyword Values before and after the Keyword Values are modified. These examples use **ID** and **Color** as Keyword Types.

Example 1: Content uses the same Multi-Instance Keyword Type Group as its folder

When modifying a Keyword Value in a Multi-Instance Keyword Type Group used by a folder and its content, the Keyword Values on the folder are duplicated exactly on the content. The content inherits the same number of instances and the same values for the Multi-Instance Keyword Type Group as on the folder. Below, the values of the keywords ID and Color used by the folder are modified, so the values of the keywords ID and Color used by the content are modified.

	Folder Keywords	Content Keywords
Before Modification	ID: **111** Color: **Red**	ID: **222** Color: **Blue**
After Modification	ID: **444** Color: **Green**	ID: **444** Color: **Green**

Caution: When a folder has fewer instances of a Multi-Instance Keyword Type Group than its content, the content is modified to only use the instances of the Multi-Instance Keyword Type Group used by the folder.

Below, the values of the keywords ID and Color used by the folder are modified, so the instances of the keywords ID and Color used by the content are replaced by the instance of the keywords ID and Color used by the folder.

<table>
<tr><th></th><th>Folder Keywords</th><th>Content Keywords</th></tr>
<tr><td rowspan="2">Before Modification</td><td rowspan="2">ID: 111
Color: Red</td><td>ID: 222
Color: Blue</td></tr>
<tr><td>ID: 333
Color: Yellow</td></tr>
<tr><td>After Modification</td><td>ID: 444
Color: Green</td><td>ID: 444
Color: Green</td></tr>
</table>

Example 2: Content uses a Multi-Instance Keyword Type Group that contains a Keyword Type used by its folder

When modifying a Keyword Value used by the folder that is in a Multi-Instance Keyword Type Group used by the content, each instance of that Keyword Value in the Multi-Instance Keyword Type Group used by the content is modified. Below, the value of the keyword ID used by the folder is modified, so the value of each instance of the keyword ID used by the content is also modified.

<table>
<tr><th></th><th>Folder Keywords</th><th>Content Keywords</th></tr>
<tr><td rowspan="2">Before Modification</td><td rowspan="2">ID: 111</td><td>ID: 222
Color: Blue</td></tr>
<tr><td>ID: 333
Color: Yellow</td></tr>
<tr><td rowspan="2">After Modification</td><td rowspan="2">ID: 444</td><td>ID: 444
Color: Blue</td></tr>
<tr><td>ID: 444
Color: Yellow</td></tr>
</table>

Example 3: Content uses a Keyword Type that is contained in a Multi-Instance Keyword Type Group used by its folder

When modifying a Keyword Value in a Multi-Instance Keyword Type Group used by the folder, the Keyword Value used by the content is not modified. Below, the value of the keyword ID in the Multi-Instance Keyword Type Group used by the folder is modified, but the value of the keyword ID used by the content is not modified.

	Folder Keywords	Content Keywords
Before Modification	ID: **111** Color: **Red**	ID: **222**
After Modification	ID: **444** Color: **Green**	ID: **222**

Working with Folder Notes

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

For example, suppose you have case file that contains multiple subfolders. In OnBase, the case file folders can be set up as containers for folder notes, allowing you to comment on and add bookmarks to any document in any folder in the case file. Other users with permissions to view these notes can immediately see them upon opening the case file.

Depending on your privileges, you may be able to create the Folder Note Types on which folder notes are based. This privilege lets you create Folder Note Types from within the OnBase Client. When creating a Folder Note Type, you can decide whether other OnBase users may view or modify notes based on that type. You can also choose whether the notes will act as a bookmarks.

- If you have privileges to create Folder Note Types, see Creating Folder Note Types on page 260.
- To use folder notes and bookmarks, see Using Notes and Bookmarks on Folders on page 263.

Note: Folder notes can be both viewed and created in both the OnBase Client (advanced File Cabinets window), Web Client, and Unity Client. Folder notes cannot be viewed or created from the classic File Cabinets window.

Folder Notes Requirements

Not all folders allow notes. To allow notes, a folder must satisfy one of the following requirements:

- The folder is based on a Folder Type configured as a parent for folder notes. These parent folders define the branch of the folder tree where notes are allowed.
- The folder resides within a parent folder for folder notes.

Folder notes are available only from the advanced File Cabinets window. For information about accessing the advanced File Cabinets window, see Advanced File Cabinets Window on page 214.

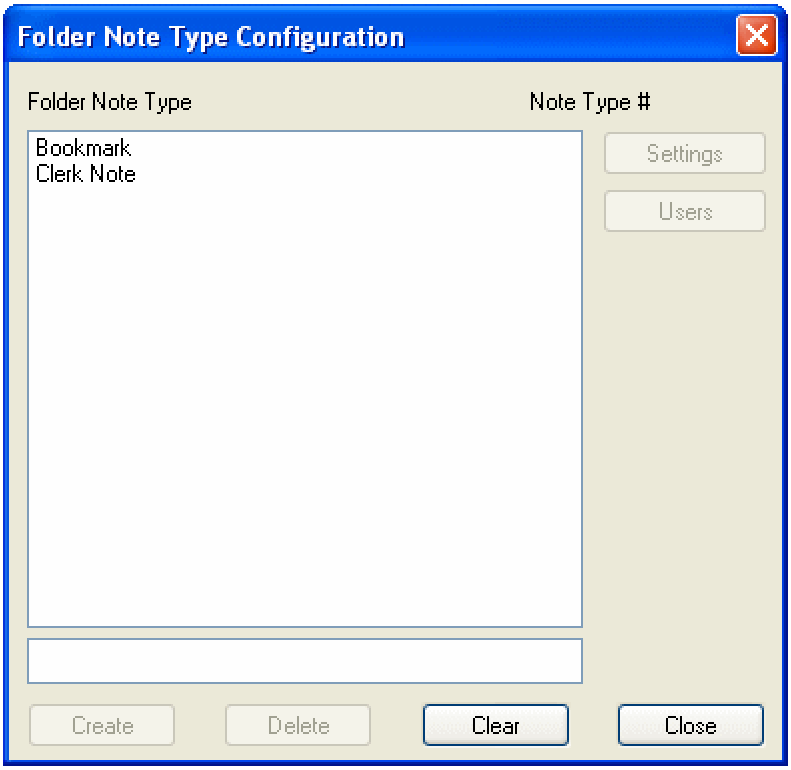
To work with folder notes, you must have sufficient privileges. Without Folder Note Type privileges, you cannot create or view folder notes.

Creating Folder Note Types

If you have sufficient privileges, you can create the Folder Note Types on which folder notes are based and assign privileges to them.

1. Open the advanced File Cabinets window.
2. Display the **Folder Notes** pane. On any pane's caption, right-click and select **Folder Notes**.
3. In the **Folder Notes** pane, right-click and select **Folder Note Types**.

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

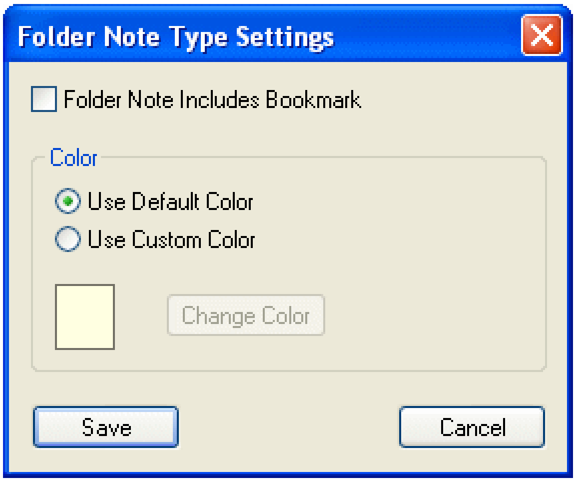


4. Type a unique name for the Folder Note Type in the field provided.

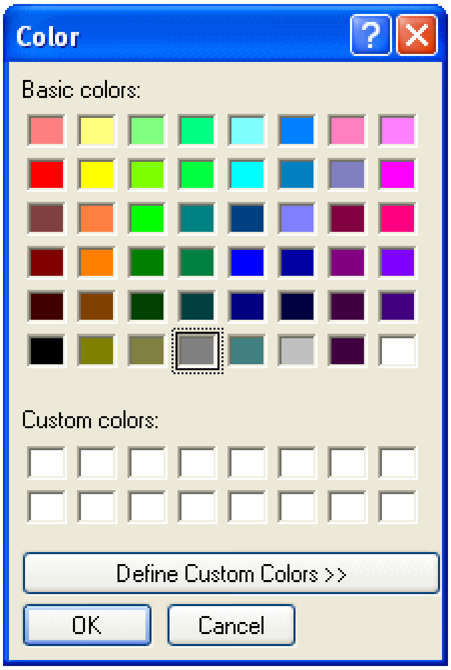
   Use a naming convention that indicates whether the Folder Note Type is a bookmark.
5. Click **Create**.

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

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



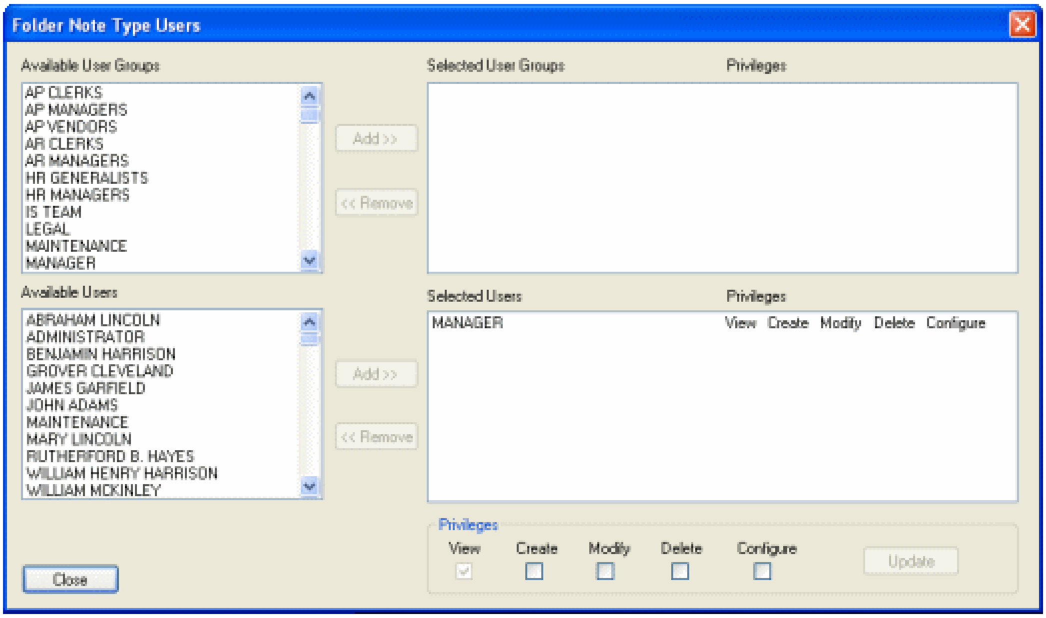
7. To make the Folder Note Type a bookmark, select **Folder Note Includes Bookmark**. Bookmarks include a **Go to page** button that users can click to display the bookmarked page.
8. To change the note color, select **Use Custom Color**. Different colors can help users understand the note's importance,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



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

c. Click **OK**.

9. Click **Save**.
10. From the **Folder Note Type Configuration** dialog box, click **Users**. The **Folder Note Type Users** dialog box is displayed.



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

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

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

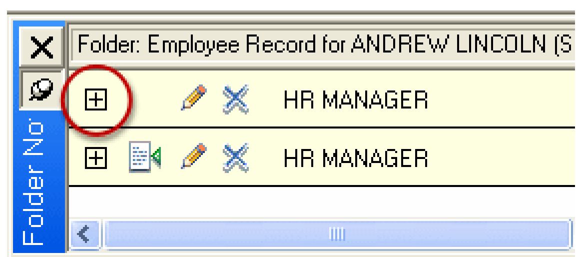
13. Click **Add**. The selected groups or users and their privileges are displayed in the panes on the right.
14. To modify a group or user's privileges:
    a. Select the group or user from a pane on the right.
    b. Select or clear privileges as needed.
    c. Click **Update**.
15. Click **Close**.
16. Repeat steps 4–15 for each Folder Note Type needed.

Using Notes and Bookmarks on Folders

Folder notes are displayed in the **Folder Notes** pane of the advanced File Cabinets window. Even if the **Folder Notes** pane is closed, it is automatically displayed when you open a folder that allows folder notes. When you view a folder that allows notes, the pane displays all notes residing on any folder in the same branch of the folder tree.

Note: Two parent folders for folder notes can exist within the same branch of the folder tree. In this scenario, the higher-level parent folder does not display notes residing on folders within the lower-level parent. The lower-level parent folder acts as an isolated container for the notes residing on it and its child folders. This configuration allows multiple sets of notes to exist within a single folder structure. For information about how your folder solution is configured, contact your system administrator.

If you have sufficient privileges, you can add, edit, or remove folder notes. See the following table for information about performing these tasks. If folder notes are unavailable from the folder you are viewing, ensure the Folder Notes Requirements on page 259 are met.

Task	Procedure
Add Comments and Bookmarks to Folders	1. Open the advanced File Cabinets window. 2. Open the folder where you want to add the note. 3. If you are adding a bookmark, navigate to the document and page that you want to bookmark. 4. If the **Folder Notes** pane is not displayed, right-click any pane's caption and select **Folder Notes**. 5. Right-click in the **Folder Notes** pane and select the type of note you want to add. If you are adding a bookmark, select the Note Type set up to bookmark documents. 6. Type the note text in the field provided. If you are adding a bookmark, the Auto-Name of the bookmarked document is already entered. 7. Click **OK**. The new note is added to the top of the list.
Open a Note	To view a note's content and when it was created, click the + on the left side of the note.  **Note:** The date and time reflect the regional settings of the workstation from which the note was created.

Task	Procedure
View a Bookmarked Document	To quickly retrieve a bookmarked document, click the **Go to Page** button from the bookmark in the **Folder Notes** pane. This button is available only on bookmarks; it is not available on standard notes.  **Note:** If an error is displayed, the document may have been removed from the folder, deleted from OnBase, filtered from the documents list, or you may lack privileges to the document.
Edit Existing Notes	To edit a note, click the **Edit** button from the note in the **Folder Notes** pane. Edit the text as needed, and then click **OK**. 
Delete Notes	To delete a note, click the **Delete** button from the note in the **Folder Notes** pane. Click **Yes** when prompted. 

Printing Folder Contents

The OnBase Client lets you print all of a folder's contents at one time, including documents residing in any child folders. To print all the documents in a folder and its child folders, complete the following steps:

1. From the File Cabinets window, select the folder you're printing.
2. Right-click and select **Folder Contents | Print**:
3. Select one of the following options:

Option	Description
Folder Documents	Prints all documents in the selected folder only.
Folder and Child Folder Documents	Prints all documents in the selected folder and in all of its child folders.

   The **Print** dialog box is displayed.
4. Adjust the print options if prompted. Available options may vary depending on your system's setup.

   For descriptions of OnBase printing options, see the Printing Documents topic in the OnBase Client help.
5. Click **OK**. OnBase prints all documents in the folder (and its child folders, if selected).

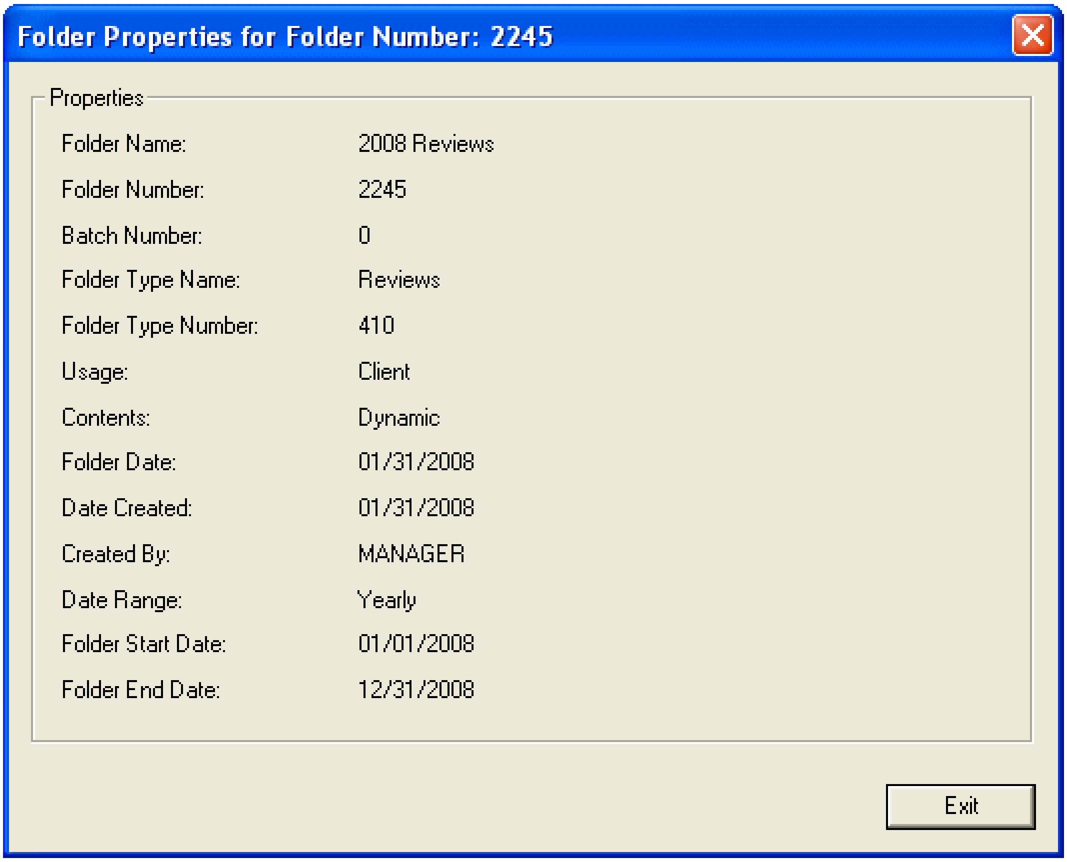
Note: Your privileges to print documents may be restricted by Document Type. If you need to print every document in a folder but cannot, contact your system administrator.

Folder Properties

The **Folder Properties** window provides information about a selected folder, including its content type, creation date, folder date, date range, and creator. Folder properties are available only to users with sufficient privileges.

1. Select the folder from the File Cabinets window.

   If you are using the classic File Cabinets window, the folder must be selected in the **Child Folders** pane. To view the properties of a file cabinet, you must use the advanced File Cabinets window. File cabinets are displayed in the **Folder Tree** pane only, and you cannot access properties from the **Folder Tree** pane of the classic File Cabinet window.
2. Right-click and select **Properties**. The folder's properties are displayed.



Properties are described in the following table. For more information about your folder configuration, contact your system administrator.

Property	Description
Folder Name	The folder's Auto-Name.
Folder Number	The internal number assigned to the folder when it was created.

Property	Description
Batch Number	The number of the batch that imported the document that created the folder. Batches of documents are imported through OnBase's processing modules, such as COLD/ERM. If the folder was not created through a batch, this number is **0**.
Folder Type Name	The name of the Folder Type on which the folder is based.
Folder Type Number	The internal number of the Folder Type.
Usage	The usage type of the Folder Type.
Contents	The content type of the Folder Type. The content type determines whether the folder contains documents and how any documents are stored. Possible values include **Folders Only**, **Static**, **Dynamic**, **Static/Dynamic**, **Static/Child Contents**, and **Dynamic Group**. **Static/Child Contents** is displayed for folders that display the static contents of child folders.
Folder Date	The date assigned to the folder when it was created. The folder date can be modified to suit your business needs.
Date Created	The date the folder was created. This value cannot be modified.
Created By	The name of the user who created the folder or who ran the process that created the folder.
Date Range	The date range assigned to the Folder Type. Possible values include **None**, **Daily**, **Weekly**, **Monthly**, **Quarterly**, **Biannually**, and **Yearly**.
Folder Start Date	The start date of the folder's date range. This property has no value if the Folder Type has no date range.
Folder End Date	The end date of the folder's date range. This property has no value if the Folder Type has no date range.

Note: File cabinet properties display only the properties of the file cabinet, not the properties of the folders it contains.

Clear Selected

Select **Clear Selected** to clear the selected items in a Document Search Results list or in a list of documents in a folder or envelope.

In the advanced File Cabinets window, the viewer displays the selected document. To clear the selection from the list and the viewer, select **Clear Selected**.

Note: If you have modified a document in the advanced File Cabinets window, you must either save or discard your changes before closing the document. When you open another document or select **Clear Selected**, you are prompted to save your changes (to a new document, for example) or discard them.

Navigating Documents in the OnBase Client Module

The system provides a variety of ways to navigate options. Depending on the option you need and the way you prefer to work, you can navigate using toolbar buttons, right-click menus, and the keyboard.

- Use the toolbar buttons, the **Document** menu and right-click menu options to navigate documents (**Go To Page**, **Zoom In**, **Next Page**, etc.)
- In text-based documents, use the **Page Down** and **Page Up** keyboard keys or the arrow keys to scroll vertically or horizontally.
- Use the scroll bar to scroll vertically or horizontally.

Note: You can remove the vertical scroll bar from text documents by selecting the **Disable Vertical Scroll Bar** option from the right-click menu.

Note: Using the scroll bar enables viewing the first 513 characters in a line of text across a page.

Previous Page

To view the previous page of an open document, complete one of the following actions:

- Select **Document | Previous Page**.
- Right-click and select **Navigate | Go To Page** to display the **Go To Page** dialog box. Enter the page number of the previous page in the **Page** field and click **OK**.

Note: Using the **Go To Page** option is the only way to navigate to suppressed pages contained within an image document. For more information on suppressed pages, see your system administrator.

- Click the **Previous Page** toolbar button.
- Press the **Page Up** key to scroll to the top of the current page, then press **Page Up** again to navigate to the previous page.

Next Page

To view the next page of an open document, complete one of the following actions:

- Select **Document | Next Page**.
- Right-click and select **Navigate | Go To Page** to display the **Go To Page** dialog box. Enter the page number of the next page in the **Page** field and click **OK**.

Note: Using the **Go To Page** option is the only way to navigate to suppressed pages contained within an image document. For more information on suppressed pages, see your system administrator.

- Click the **Next Page** toolbar button.
- Press the **Page Down** key to scroll to the bottom of the current page, then press **Page Down** again to navigate to the next page.

View Previous Document

To view the previous document in the Document Retrieval list, complete one of the following actions from an open document:

- Select **Document | View Previous Document**
- Right-click and select **Previous Document**
- Press **Ctrl+F6** on the keyboard
- Click the **Previous Document** toolbar button

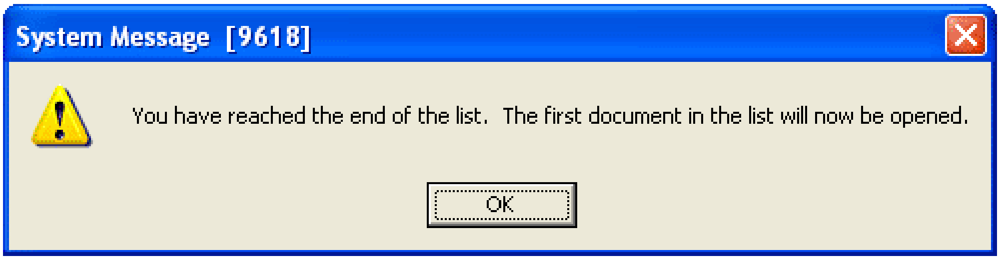
Note: When using the **Previous Document** option, the following message is displayed if the end of the list is reached or if a document is no longer in a list due to a Keyword Value change.

View Next Document

To view the next document in the Document Retrieval list, complete one of the following actions from an open document:

- Select **Document | View Next Document**
- Right-click and select **Next Document**
- Press **Ctrl+F7** on the keyboard
- Click the **Next Document** toolbar button

Note: When using the **Next Document** option, the following message is displayed if the end of the list is reached or if a document is no longer in a list due to a Keyword Value change.



Document Display Options

When working with some documents, you can change the display of the document according to your needs.

To access these display features, right-click on the document. Some features are also available from the Client Toolbar.

Navigate | Set Page Numbers

Renumber and move a page within in a document.

Scale | Zoom In

Select to magnify a page of a document.

Scale | Zoom Out

Select to display a document page at a decreased size, which displays a greater area of the document.

Scale | Actual Size

Display a document in its actual size (one pixel on the document equals one pixel on the screen.)

Scale | Fit in Window

Fit the entire page of a document into the window.

Scale | Fit Width

Fit the page of a document to the width of the window.

Scale | True Size

Select to display a document on screen in its original dimensions. For example, a 3” by 3” paper document scanned into OnBase would display as 3” by 3” area of screen space.

Process | Rotate Right

Rotate the document right 90 degrees.

Process | Rotate 180

Rotate the document 180 degrees.

Process | Rotate Left

Rotate the document left 90 degrees.

Process | Save Rotation

Save the rotation of a document so it opens with the current rotation.

Note: If you save the rotation on a page of a DJDE, PCL, or AFP document, the rotation is applied to all pages of the document.

Process | Invert

Reverse the colors in the color palette. For example, black pixels become white and white pixels become black.

Process | Flip Horizontally

Reverse the document horizontally so it displays as a mirror document left to right.

Process | Flip Vertically

Reverse the document vertically so it displays as a mirror document top to bottom.

Note: If a document has an overlay assigned, all rotate, flip and invert options are available to the document itself, but not the overlay.

Display | Normal

Display the document without any size or color changes. **Normal** is the default setting.

Display | Preserve Black

Strengthen the coloring of the black pixels in a document; this option can make document with light text easier to read.

Display | Scale to Gray

Soften the contrast of a black and white document.

Image Zooming | Save Zoomed Area

After changing the view of the document with the **Zoom In** or **Zoom Out** buttons, select to save the view.

Note: Selecting **Save Zoomed Area** applies the zoomed area globally to all images for all users.

Note: This feature is not available for PCL documents.

Image Zooming | Reset Zoomed Area

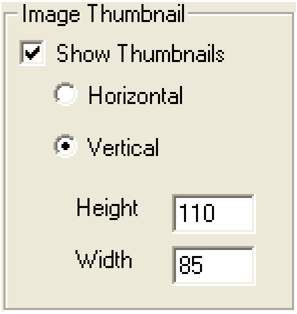
Select to reset the view of the document to its default view.

Reset

Reset the document page view to its default size (set in Workstation Options in the Client module.)

Using Thumbnails

If thumbnails are not visible, select the **User | User Options | Document** tab **| Image Thumbnail** area. Check the **Show Thumbnails** check box. Select the default thumbnail orientation:



- Horizontal (below the document), or
- Vertical (to the right of the document).

Set the height and width dimensions of your thumbnails.

Enabling Thumbnails

- Right-click on a document and select **Thumbnails**.
- Select **Document | Thumbnails**.
- Press **Ctrl - U**.
- Press the **Toggle Thumbnails** toolbar button.

Navigating Documents Using Thumbnails

Place your cursor above the thumbnail to enlarge.

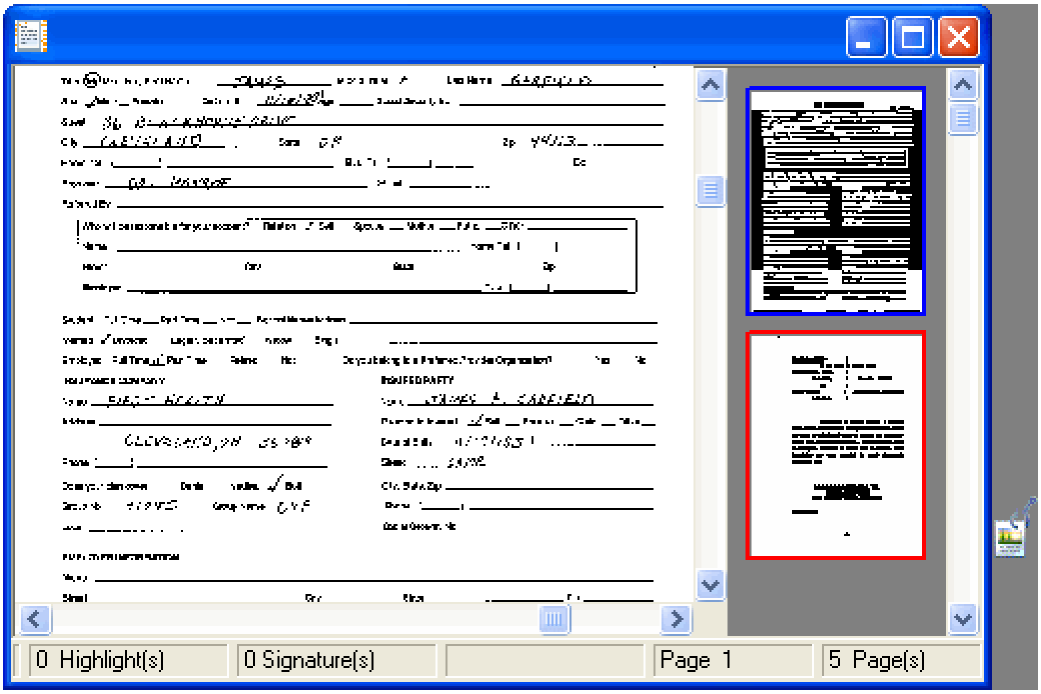
Double-click the thumbnail to display the full-sized page in the document viewing window.

Scroll through a document's thumbnails using the scroll bar to the right of the thumbnails.

If the document being viewed appears larger than the document window, the thumbnail displays an inverted rectangle, which denotes the portion of the document displayed in the window.

Removing Pages

Right-click and drag the thumbnail to the system desktop, as shown in this example. The system prompts **Do you wish to create a new document from this page?** Select **No**.



If working with a multi-page document, the system prompts you with **Are you sure wish to delete this page?** When working with a single page document, the system prompts you with **Deleting this page will delete the entire document, continue?** Select **Yes** to delete the page.

Note: A new document can be created from a page deleted from the thumbnail window.

Copying Pages Between Documents

To copy one thumbnail page:

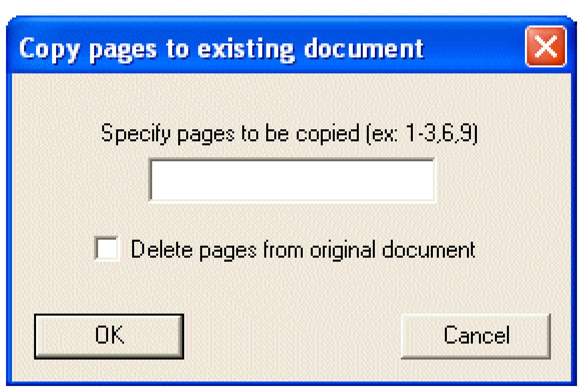
1. Open both documents.
2. Right-click on the thumbnail of the page you want to copy.
3. Drag the page to the document.
    - To position the page at the end of the document, drop it onto the gray area after the last page of the document.
    - To position the page at any position other than the last page, drop the thumbnail directly on the thumbnail that occupies the desired position.

Note: Depending on your system's configuration, you may be unable to copy pages. See your system administrator if you have questions.

Copying Multiple Pages in a Document:

1. Open both documents.
2. Right-click the gray area below the thumbnail (not on the thumbnail). The cursor turns into a drag-and-drop icon.

3. Drag the icon to the gray area of the open document where you want to append the copied pages. The **Copy Pages to Existing Document** dialog box displays.



4. Enter the number of pages that you want appended.
5. If you want to delete copied pages from the original document, select the **Delete Pages from original document** check box.

6. Click **OK**.

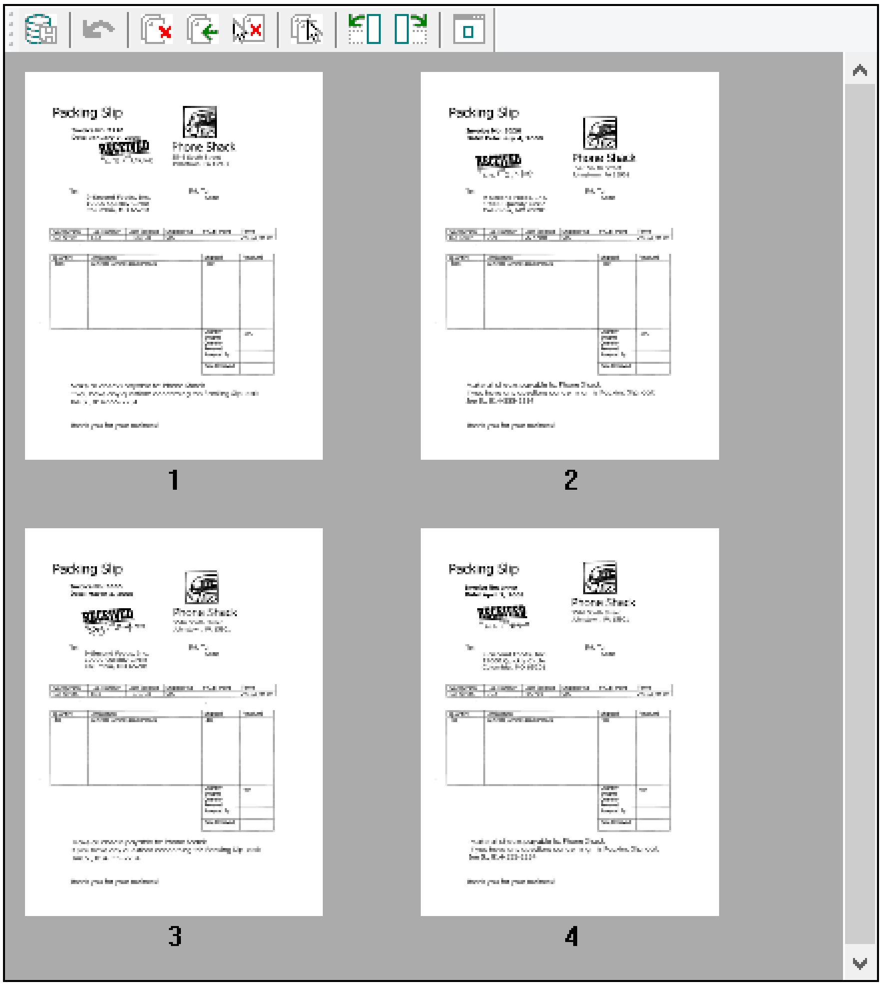
View Thumbnails Only

You can preview all pages of a document in a thumbnail view. To preview pages:

1. Right-click on the open document and select **View Thumbnails Only**.

Note: Depending on your configuration, you may not have this option. Instead, you may have a **Delete/Reorder Pages** option, which offers the same functionality.

A new window opens to display all of the pages within the document in a thumbnail view.



2. You can view a thumbnail in more detail by hovering over it. The size of the thumbnails and the size of zoomed thumbnails is determined in the **Thumbnail Sizes** dialog box.

Modify Thumbnail Display

1. Right-click on the open document and select **View Thumbnails Only**.
2. Click the **Set sizes** button.

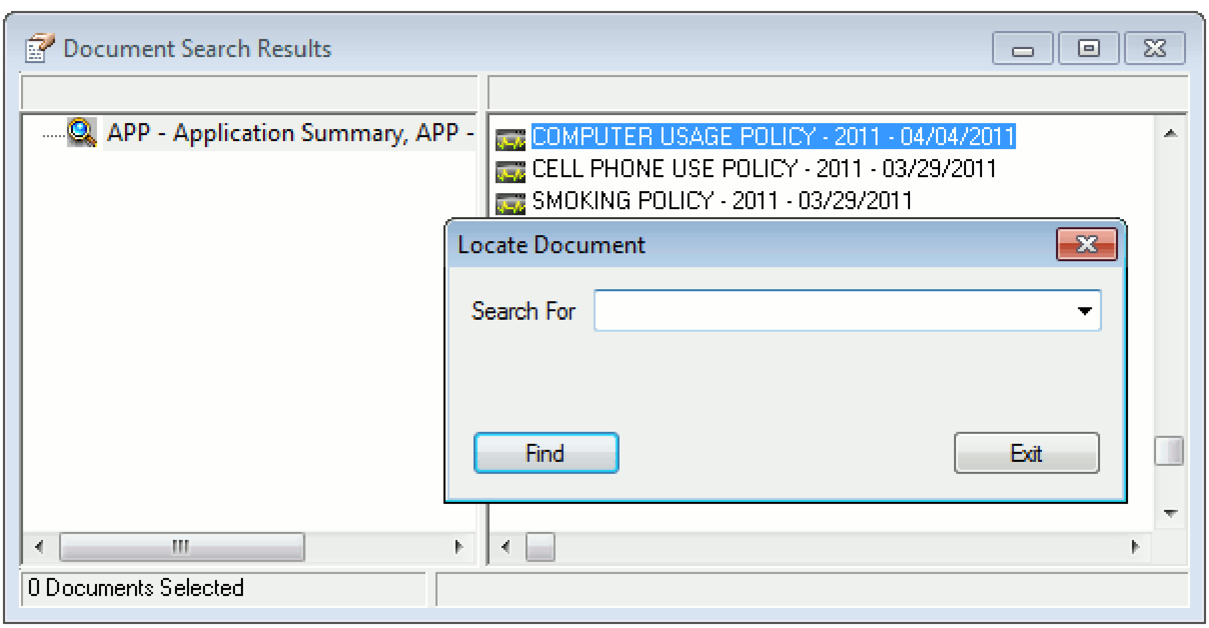
   The **Thumbnail Sizes** dialog box displays.
3. Set the desired **Width** and **Height** for the thumbnails.

   You can set both the **Normal Thumbnails** size (the default thumbnail view) and the **Zoomed Thumbnails** size.
4. In **Delay**, type the number of seconds you want to hover your cursor over a thumbnail before the zoomed thumbnail displays.
5. Click **OK** to save your changes.

Note: The thumbnail sizes configured in the **Thumbnail sizes** dialog box are context-sensitive. You can set thumbnails to display in different sizes based on the context from which you accessed the **Thumbnail sizes** dialog box.

Locating a Document

You can use the **Locate Document** feature to find a specific document in a Document Search Results List. From a Document Search Results List, right-click on a document to display the **Locate Document** dialog box:



Type a text string in the drop-down list field, and click **Find** to locate the first instance of that document within the **Document Search Results** list. The most recently searched value will be the default.

- Search text is not case-sensitive.
- If you do not select any documents from the list before right-clicking and selecting **Locate Document**, the search will begin at the beginning of the list.
- Search by text string only - no wildcards
- If you select a document from the list and then right-click and select **Locate Document**, the search will start at that document (but not include it in its search).
- Each string you search for is saved in the Locate Document drop-down list.

Saving Documents Outside of OnBase

Save As Document

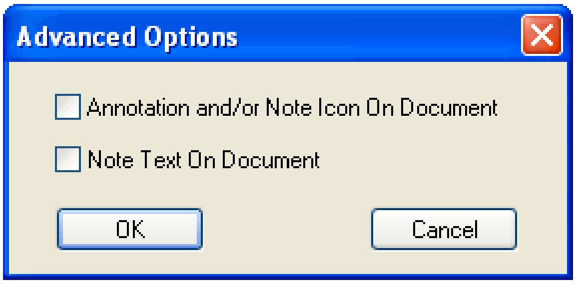
If you have sufficient privileges, you can save open documents to a location outside of OnBase using any of the following methods:

- From an open document, click the **Save to File** toolbar button.
- From an open document, select **File | Save As**.
- From an open document or from any document(s) selected in a Document Search Results list, right-click and select **Send To | File**.

  When you select **Send To | File** from a Document Search Results list:

  - For multi-page image documents, the document is stored in Group IV Tiff format.
  - Other documents are stored in their original formats.
  - The document is saved without any notes attached to the document - i.e., the **Advanced Options** window is never displayed when using this method
  - Text formatting options do not display.

If you use any of these methods from an open image or text document that contains notes, the **Advanced Options** window is displayed.



Option	Description
Annotation and/or Note Icon On Document	Prints note text and information about each note (e.g. the note's Auto-Name string, the user name of the note's creator and the date and time the note was created) on the document.
Note Text On Document	Prints note text and information about each note (e.g. the note type, the note's Auto-Name string, the user name of the note's creator, the date and time the note was created and the location of the note) on a separate page following the document **Note:** This option is not respected by Overlapped Text annotations.

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.

After selecting all desired options, the Windows **Save As** dialog box is displayed with the document's native file format as the file type and the document's auto-name string as the file name.

Note: This does not apply to image documents or OLE documents. Image documents use Group IV Tiff file format by default, and OLE documents will not have their file formats automatically populated in the Windows **Save As** dialog box.

Keep in mind the following considerations when saving a document outside of OnBase:

- The document's Auto-Name string may be truncated to keep the full path to the file at or below 255 characters.
- Text documents have a variety of options that pertain to text formatting. See your system administrator for further information regarding text-based and other file formats.

Note: Text documents are saved in text format unless an overlay is displayed or notes are being saved with the document. If an overlay is displayed prior to saving, the document is saved as an image. If notes are being saved with the document, you can save the document as an image or a PDF.

- XML documents and their associated style sheets may be combined and saved as one HTML file. XML documents without a style sheet applied to them may be saved as XML documents.
- When saving documents with overlays to a location outside of OnBase, overlays are only included if the overlay was displayed on the document prior to saving it.
- To save a document with an overlay as a PDF, you must save the document from an open document. Saving a document with an overlay as a PDF is not supported as a right-click option in a Document Search Results list.

Saving an XML Document

You have several options when saving XML documents to a location outside of OnBase.

If the document does not have a style sheet applied to it, or if the document's style sheet is turned off:

- The document can only be saved as an XML document.

If the document does have a style sheet applied to it:

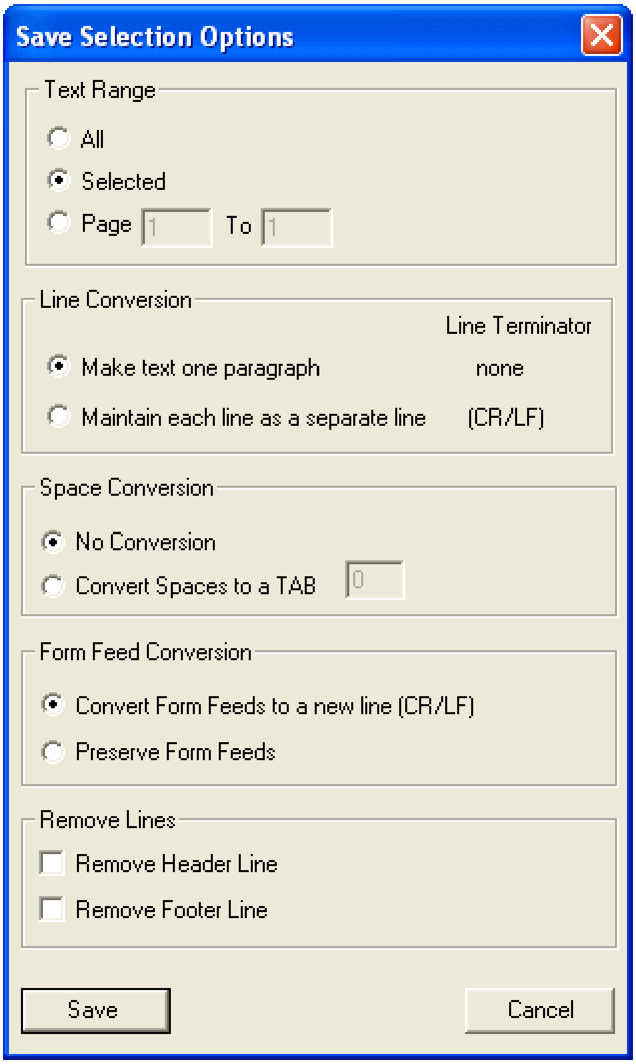
- The document and the style sheet may be saved together as one HTML document.
- The document may be saved individually as an XML document.

Note: If the document is saved individually as an XML document, its formatting will not be saved and it can only be viewed as an XML document.

Save As - Text Document

If your document's File Format is Text Report Format, the **Save Selection Options** dialog box is displayed.

Note: The Document Type setting **Characters per line** is respected when saving a document outside of OnBase. Depending on your system's configuration, text files saved outside of OnBase may be truncated.



Select the appropriate options at this dialog box. These options are described in the following table:

Option	Description
Text Range	• Select **All** to save the entire document. • If you have selected text prior to selecting **File | Save As**, the **Selected** option is enabled. Select this option to save only the selected text. • Select a **Page** range to save only those pages.
Line Conversion	• Select **Make text one paragraph** to save the text as one paragraph. Extra spaces will be added in order to separate each line of text. **Note:** If you select this option, current text formatting will not be kept. • Select **Maintain each line as a separate line** to save the text with its current formatting.
Space Conversion	• Select **No Conversion** to save the text with all spaces intact. • Select **Convert spaces to a TAB** and enter a number to convert that number or more spaces to a tab upon saving (for example, if you enter a 2, when the system finds two or more space in the document, it will convert them to a tab).
Form Feed Conversion	• Select **Convert Form Feeds to a new line [CR/LF]** to convert form feed code to a line upon saving. • Select **Preserve Form Feeds** to keep form feed code intact upon saving.
Remove Lines	The **Remove Header Line** and **Remove Footer Line** items can be used to strip unwanted text from the top and bottom of each page saved. Select to **Remove the Header Line** or **Remove the Footer Line** or select both to remove both upon saving. The number of lines removed from the header and footer are determined by the **Report Header Line** and **Report Footer Line** values set for the Document Type on the **View / Print Options** dialog box.

Click **Save**. From the **Save As** dialog box, select the appropriate options and click **Save**. The **Save As** options are described in the following table:

Parameter	Description
Save in	Ensure that the location where the file will be saved is reflected in the **Save in** field.
File name	In the **File name** field, type the desired name for the new file. **Note:** If any of the following characters are used in the file name, they will be replaced with valid characters: *** / \ < > : ? |**
Save as type	Select the format that the document will be saved as from the **Save as type** drop-down list. A text document can be saved as a text or PDF file. Use the **All Files** option to save the text document with a different file extension. For example, a text document can be saved as a .csv (comma-separated values) file using this **All Files** option.

Save As - Documents with a File Format Other than Text Report Format

For all documents that are not text based, the **Save As** dialog box displays.

When the location, file name, and format options for the saved document are satisfactory, click **Save**. The **Save As** options are described in the following table:

Parameter	Description
Save in	Ensure that the location where the file will be saved is reflected in the **Save in** field.
File name	In the **File name** field type an appropriate name for the new file. The document's name displays by default. **Note:** If any of the following characters are used in the file name, they will be replaced with valid characters: *** / \ < > : ? |**

Parameter	Description
Save as type	Select the format that the image will be saved as from the **Save as type** drop-down list. **Note:** When HTML-based forms with embedded scripts are saved, the embedded scripts are also saved. **Note:** When XML documents that have an associated style sheet are saved as XML documents, its formatting will not be saved and it can only be viewed as an XML document.
Page Range	Select **All** to save the entire document. Select **Current Page** to save the currently displayed page, or **Pages** to specify only a range of pages to save from the document. **Note:** If you are saving the document as a PDF, these options are disabled, and **All** is selected. **Note:** For multi-page image documents being saved as a file type other than .tif or .dcx, only **Current Page** is available.
Dithering Options	Some file formats allow you to select dithering options. Dithering is used to create additional colors and shades from an existing palette by interspersing pixels of different colors. On a monochrome display, areas of gray are created by varying the proportion of black and white pixels. In color displays, colors and textures are created by varying the proportions of existing colors.

Save as Zip File or Encrypted Zip File

If you have sufficient privileges, you can save multiple documents as a Zip file to a location outside of OnBase. Saving as a Zip file is performed from the Document Search Results list or from an open envelope.

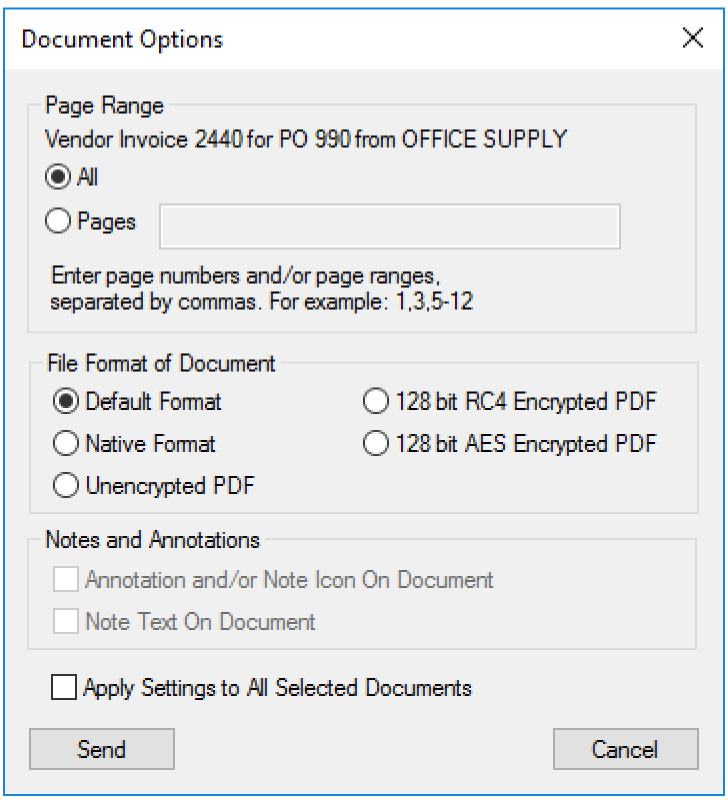
The Zip file can either be saved as a standard Zip file or an encrypted Zip file. Creating an encrypted Zip file is the same process as creating a standard Zip file, except for an encrypted Zip file, you are required to enter a password at the end of the process.

To save multiple documents as a Zip file outside of OnBase:

1. Retrieve and select the appropriate documents in the Document Search Results list or an open envelope.
2. Select one of the following actions:
   - To save the documents as a standard Zip file, do one of the following:
     - Right-click within the list of selected documents and select **Send To | Zip File**.
     - Select **File | Save As Zip File**.
   - To save the documents as an encrypted Zip file, do one of the following:
     - Right-click within the list of selected documents and select **Send To | Encrypted Zip File**.
     - Select **File | Save As Encrypted Zip File**.

   After selecting one of the above actions, the Windows **Save As** dialog box is displayed.
3. Enter a name for the Zip file and click **Save**.

   If any of the selected documents are images, the **Document Options** dialog box is displayed for each image.



4. Select the appropriate options to configure how you would like each particular image saved.

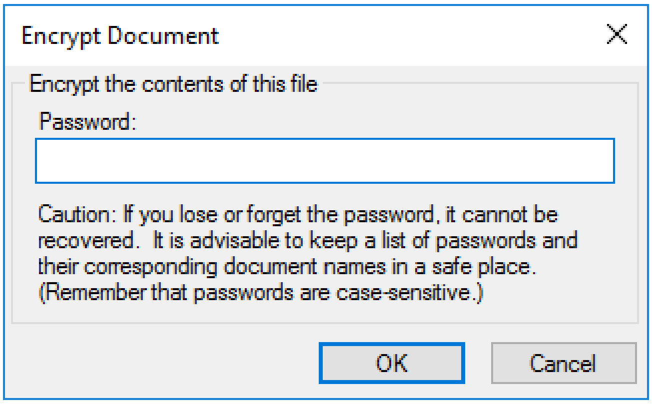
Note: Notes and overlays cannot be saved when saving to a Zip file. They can only be saved from an open document.

Page Range	Description
All	All pages in the selected document will be sent.
Pages	The page(s) specified in the text field will be sent. Enter page numbers and/or page ranges, separated by commas. For example: 1,3,5-12. **Note:** This option is only available when sending documents in the **Default Format** or **Native Format**.

File Format of Attachment	Description
Default Format	Sends the document as a TIFF file.
Native Format	Sends the document in the format in which it is stored in OnBase (e.g., JPEG, GIF, PNG, etc.).
Unencrypted PDF	Sends the document as a PDF file.
128 bit RC4 Encrypted PDF	Sends the document as a 128-bit Rivest Cipher 4 (RC4) encrypted PDF file. Upon choosing this Content Type, you will be prompted to enter a password, which the recipient will need to enter upon opening the attachment.
128 bit AES Encrypted PDF	Sends the document as a 128-bit AES (Advanced Encryption Standard) encrypted PDF file. Upon choosing this Content Type, you will be prompted to enter a password, which the recipient will need to enter upon opening the attachment.

File Format of Attachment	Description
Apply Settings to All Selected Documents	This check box is available when either the **Native Format** or PDF options are selected. Select this check box when sending multiple image documents to apply either the **Native Format** or PDF option to all selected documents. **Note:** This option only applies to the remaining documents in the list that have not yet been configured. For example, if you choose this option the third time you are presented with the **Document Options** dialog box, the settings are not applied to the first two documents that prompted the **Document Options** dialog box. **Note:** If the **Apply Settings to All Selected Documents** check box is selected, the **All** radio button is automatically selected and the **Pages** radio button becomes unavailable.

5. Click **Send**.
   - If you chose to create a standard Zip file, the file is saved and the process is complete.
   - If you chose to create an encrypted Zip file, the **Encrypt Document** dialog box is displayed.



6. Enter a password for the Zip file.

Caution: If you lose or forget the password, it cannot be recovered. It is advisable to keep a list of passwords and their corresponding document names in a safe place. Passwords are case-sensitive.

7. Click **OK**. The encrypted Zip file is saved.

Save As Type

When using the **File | Save As** or **Send To | File** functions to save a document outside of the system, the following file options may be available depending upon the File Format of the document:

- Amiga IFF (*.iff)
- 24-bit TARGA (*.tga)
- Brooktrout (*.bt)
- CALS (*.cal)
- Clip (*.clp)
- Compressed BMP (*.bmp)
- DCX (*.dcx)
- EPS (Screen Preview) (*.eps)
- GIF (*.gif)
- Group III TIFF (*.tif)
- Group IV TIFF (*.tif)
- Huffman TIFF (*.tif)
- JPEG (*.jpg)
- LZW TIFF (*.tif)
- Macintosh PICT (*.pct)
- Packbits TIFF (*.tif)
- PCX (*.pcx)
- PDF (*.pdf)
- Sun Raster (*.ras)
- Uncompressed TIFF (*.tif)
- Uncompressed BMP (*.bmp)
- Windows Icon (*.ico)
- WMF (Raster Only) (*.wmf)
- WPG (Raster Only (*.wpg)
- X-Windows Bitmap (*xbm)
- X-Windows Pixmap (*.xpm)
- X-Windows Drawing (*.xwd)

Sending External Mail

External mail delivers mail and attached documents from OnBase to a recipient outside the system using a compliant, external email system such as Microsoft® Outlook™. The following information provides a general overview of External Mail Services. For more information, see the External Mail Services Help files or reference manuals. Ask your system administrator to see if your system is set up for External Mail.

Note: In general, documents are delivered in their current format. Text documents that use overlays can be sent as a text documents or converted to image files, depending on your configuration.

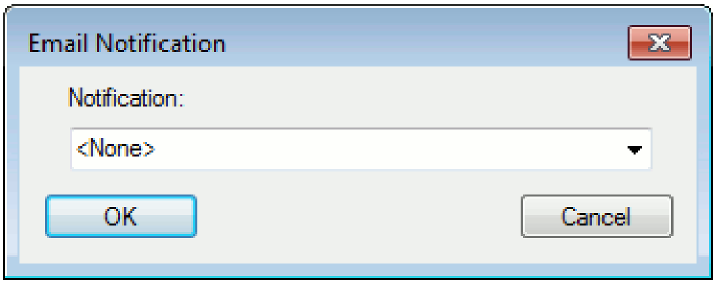
Note: If your default mail client is IBM Lotus Notes, emails composed in OnBase are auto-saved in the IBM Lotus Notes drafts folder. When emails are discarded in OnBase before being sent, they are not removed from the IBM Lotus Notes drafts folder.

To send external email messages:

1. Do one of the following:
   - Select one or more documents from a document list and choose **File | Send To | Internal User** or **File | Send To | Mail Recipient**.
   - Select one or more documents from a document list, right-click and select **Send To | Mail | Internal User** or **Send To | Mail | Mail Recipient**.
   - Select one or more documents from a document list, right-click and click the **Mail Document (External)** or **Mail Document (Internal)** toolbar button.
   - Right-click on an open document or its status bar and select **Send To | Mail | Mail Recipient** or **Send To | Mail | Internal User**.
   - Right-click on an envelope and select **Send To | Mail | Mail Recipient** or **Send To | Mail | Internal User** to attach all documents within the envelope.

Note: If your default mail client is IBM Lotus Notes and the **Use Native Mail Dialog** workstation option is not selected, notifications selected in this window will not be displayed in the body of your email message.

The **Email Notification** dialog box is displayed.



2. If notifications have been configured for your system, you can use the drop-down list to select a notification. Select a notification as desired and click **OK**.

3. The **Mail Message** dialog box opens outside of the OnBase Client module.

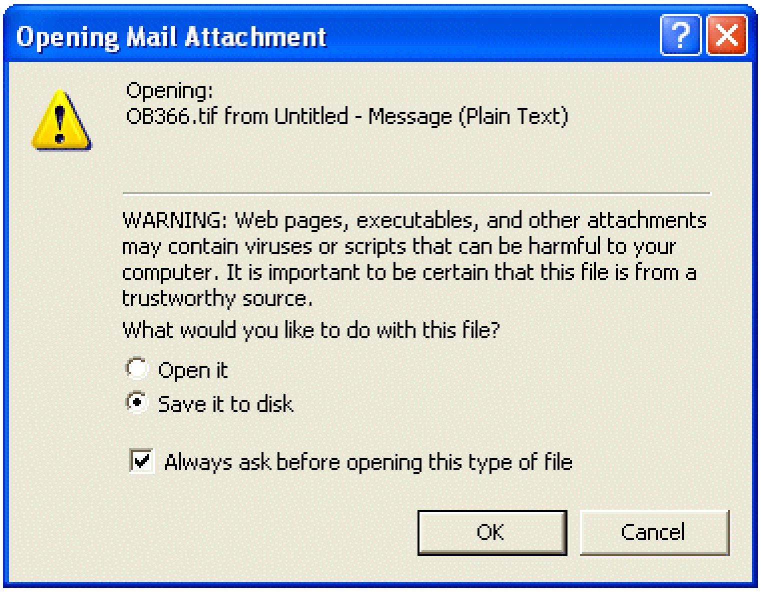
   If the attachment has been configured to use an auto-name string, the filename will be truncated if the file name and the local temporary storage path exceed 255 characters.

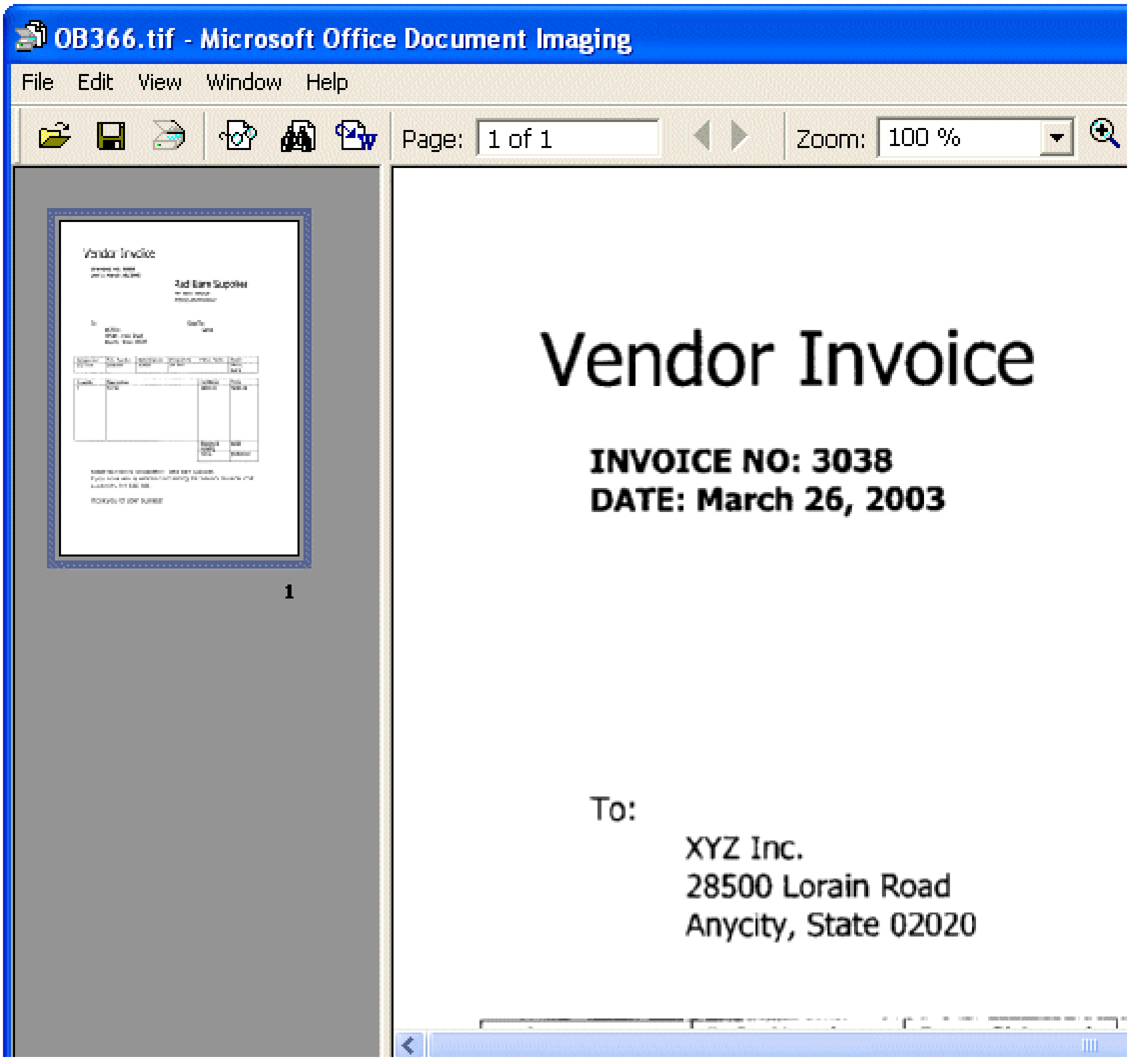
   If you selected a notification to use, your message may already have a subject and body text entered. If not, you must manually enter the recipient's email address, a subject, and message text and send the message.

   Notification text will not display if your mail format is set to Rich Text.

Note: To send Advanced Mail, select **Send To | Mail | Mail Recipient (with Advanced Options)** using any of the aforementioned methods for sending external email messages. See the External Mail Services Help files or reference manual for more information about Advanced Mail.

When mail is sent with an attachment or as an attachment, the mail sender or recipient can double-click on the attachment in the opened mail dialog box. Double-clicking allows viewing of the attachment in another window (see example below) or an **Opening Mail Attachment** dialog box displays, allowing you to either open the attachment or save it to your workstation.





Note: Your document may be set up to display in the system one way and be emailed another way. See your system administrator if unexpected results occur.

Mail Selected Text as Attachment

The **Mail Selected Text as Attachment** toolbar button provides the ability to select text from a text document and mail that selection as an attachment in your external mail program.

1. Open a text document and select text from text file (by line, column, or block).
2. Click the **Mail Selected Text as Attachment** toolbar button. The Mail Selection Options dialog box displays options for formatting of the selected text. Select from the following options and then click **Attach** when finished:
   - **Make text one paragraph** or **Maintain each line as a separate line**.
   - **No space conversion** or **Convert all spaces to tabs**.
   - **Convert Form Feeds to a new line (CL/RF)** or **Preserve Form Feeds**.

- Select to remove the Header Line, Footer Line or both (select neither to keep Header and Footer Lines).

3. A new mail message opens (from your external mail program) with that selected text as an text format attachment.

Appending Additional Documents to an Open Mail Message

Additional files can be appended to the existing email using the drag-and-drop functionality.

1. Highlight any additional documents from the **Document Retrieval** dialog box you wish to attach.
2. Right-click the documents. The cursor becomes a hook.
3. Drag and drop the documents into the **Attach...** box of the **Mail Message** dialog box.

Note: Documents outside of the Client can also be appended to the mail message using the same drag-and-drop functionality.

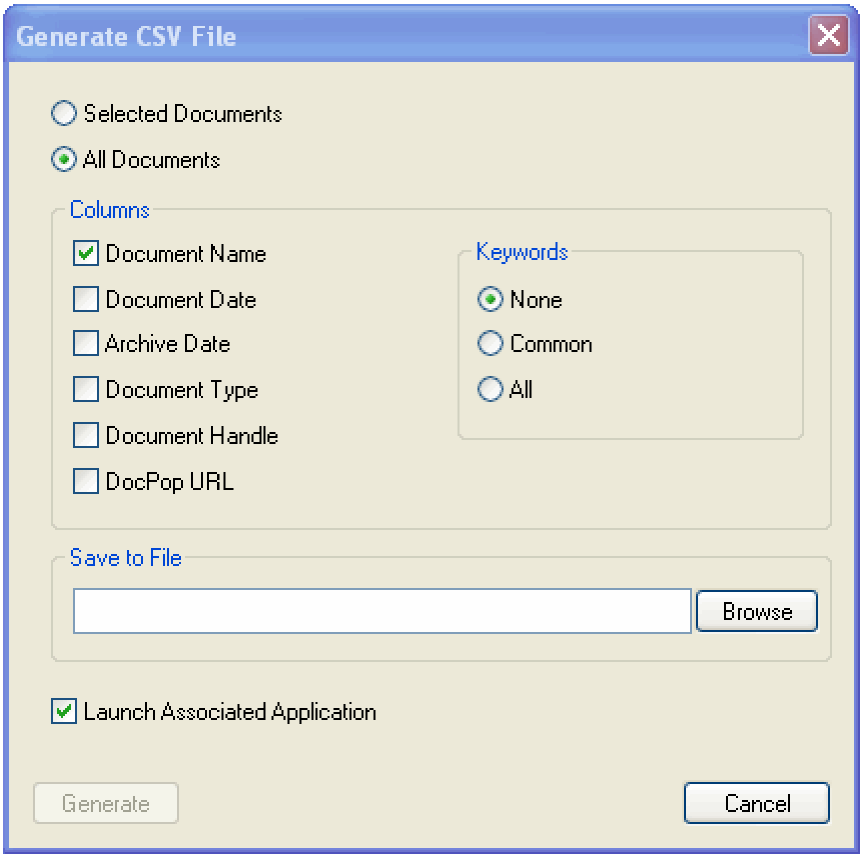
Generating a CSV File

When generating a CSV file, consider the following:

- To generate a CSV file, a user must have the **View Keywords**, **Create List Report**, and **Generate CSV Files** privileges.
- CSV files cannot be generated from Full Text Search result lists.
- In the generated CSV file, **’** is inserted at the beginning of values that begin with **=**, **-**, **@**, or **+**.

To export the results of a search in a CSV file:

1. From either a **Document Search Results** list or the **Text Search Results** window, right-click and select **Generate CSV File.** The **Generate CSV File** dialog box is displayed.



2. In the **Range** section, select one of the following options to specify which documents you want include information for in the CSV file:

Option	Description
All	Include information for all documents in the document select list.
Selected Items	Only include information for the documents you selected.

3. In the **Columns** section, select one or more of the following options to specify what information you want to include for each document in the CSV file:

Option	Description
Document Name	The Auto-Name string of the document.

Option	Description
Document Date	The date used by OnBase to identify the document. The document date is assigned to a document during import, and it can be modified after import.
Date Stored	The date on which the document was imported into OnBase. This date cannot be modified after import.
Time Stored	The time at which the document was imported into OnBase. This time cannot be modified after import.
Document Type	The name of the Document Type to which the document belongs.
Document Handle	The unique document number assigned to the document when it was imported into OnBase.
DocPop URL	The URL used to access the document using DocPop. **Note:** The **DocPop URL** option is displayed only if the user has the **Create Integration Hyperlink** privilege. See your system administrator if you need this privilege.

4. In the **Keywords** section, select one of the following options to specify which Keyword Values to include in the CSV file:

Option	Description
All	Include all Keyword Values for all documents included in the CSV file.
Common	Include only the Keyword Values for the Keyword Types that all the documents included in the CSV file have in common.
None	Include no Keyword Values in the CSV file.

5. In the **Save to File** field, enter the file name and path where you want to save the CSV file. You can select **Browse** to navigate to the correct location.
6. Select **Launch Associated Application** if you would like to view the CSV file after it is generated. The file will be opened by your default CSV application.
7. Click **Generate**. The CSV file is created at the specified location.

   Note the following:

   - The **Generate** button is not available until a file location is specified.
   - If the CSV file already exists and is currently open, you will be unable to generate the new CSV file. You must close the existing CSV file before you can overwrite it with your newly generated file.

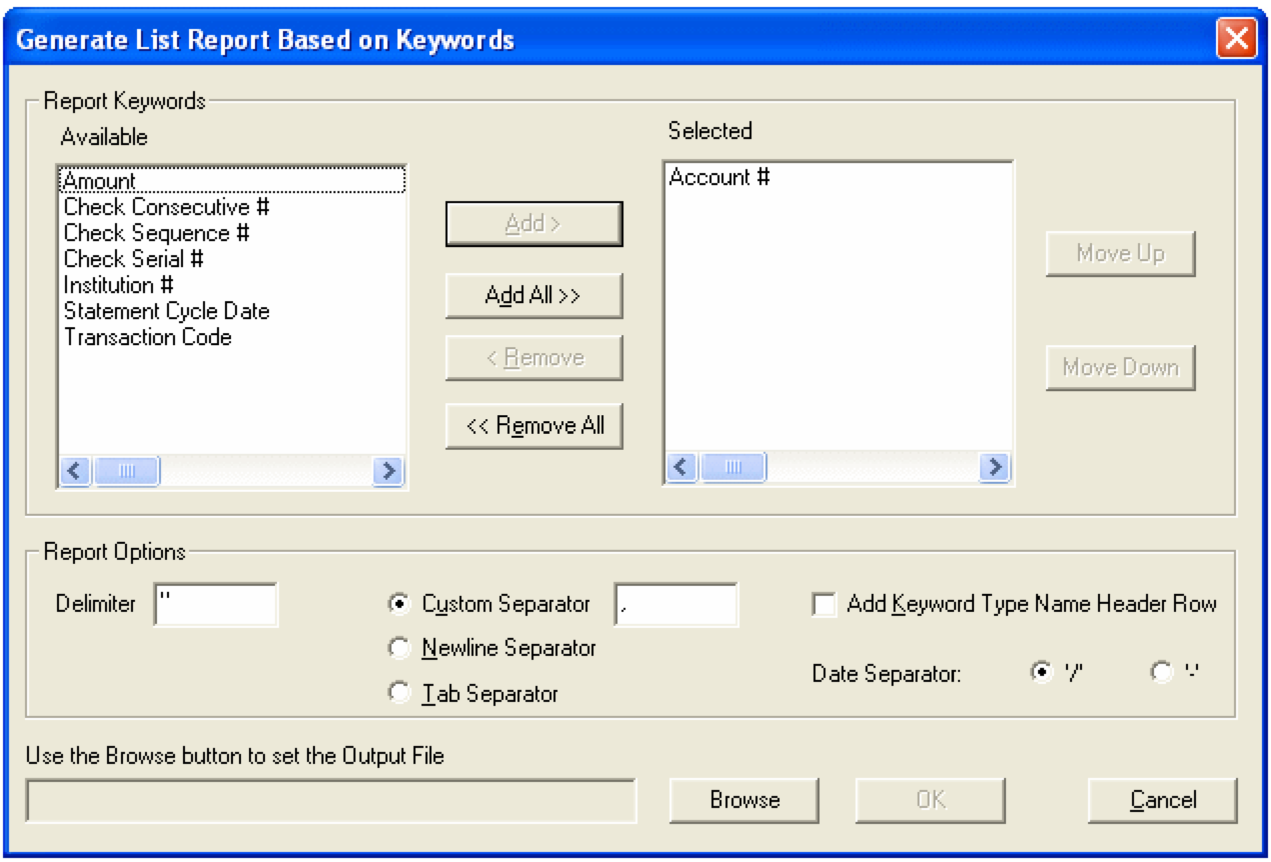
Creating Keyword Lists

The **Create Keyword List** right-click option creates a text (.txt) or comma-separated values (.csv) file that can be viewed or manipulated by other programs, or can be used with an AutoFill Keyword Processor.

Note: In order to be able to use the **Create Keyword List** function, a user must have the **Create List Report** and **View Keywords** privileges.

To create a text or comma-separated values file listing Keyword Values:

1. Select the documents in the **Document Search Results** list or select that batch from which you would like to extract Keyword Values.
2. Right-click and select **Create Keyword List**. The **Generate List Report Based on Keywords** dialog box displays.



3. Add Keyword Types to the **Selected** box.

Note: Depending on your system's configuration, you may be unable to view certain Keyword Types. These Keyword Types will not be included in the CSV file.

4. Choose your **Report Options**. See the table below:

Setting	Description
Delimiter	Define the character that encloses each field value in the customer file **Single Quote:** '596 Main St.', 'Minneapolis, MN 59634' **Double Quote:** "596 Main St.", "Minneapolis, MN 59634" **None:** 596 Main St., Minneapolis, MN 59634 Delimiters are commonly used when a separator is present within the field.
Custom Separator	Allows you to specify a character other than Newline or Tab as the separator. In the text box, place a specific character or use a \ (back slash) and the ASCII code for the character in the decimal format. Example: If a dollar sign separates the fields, input $ or \36 in the text box.
Newline Separator	Indicates to the processor that each field appears on a new line.
Tab Separator	Indicates the presence of a tab character between the fields.
Add Keyword Type Name Header Row	Creates a header row to identify the Keyword Type fields to the specific Keyword Type.
Date Separator	Allows the user to select the separator character used in **Date** and **Date & Time** Keyword Types. By default, the separator character is set to **/**.

5. Browse to the directory where you want the text or comma-separated values file to be saved. Specify a file name with a **.txt** or **.csv** extension.
6. Click **Save**.
7. Click **OK**.

Note: The Keyword List Report only shows the first instance of each Keyword Value on the document.

Searching For Specific Text

There are two types of text searching in the OnBase Client module:

- Internal Text Search
- External Text Search

Internal Text Search

An **Internal Text Search** locates text strings in an open text-based document. You can effectively customize searches by narrowing search criteria and/or the area in a document to search. (For example, you could search for a particular number value only if it is in a currency format. Or you could search only the first column of a document for a particular text string).

There are two methods for conducting an Internal Text Search:

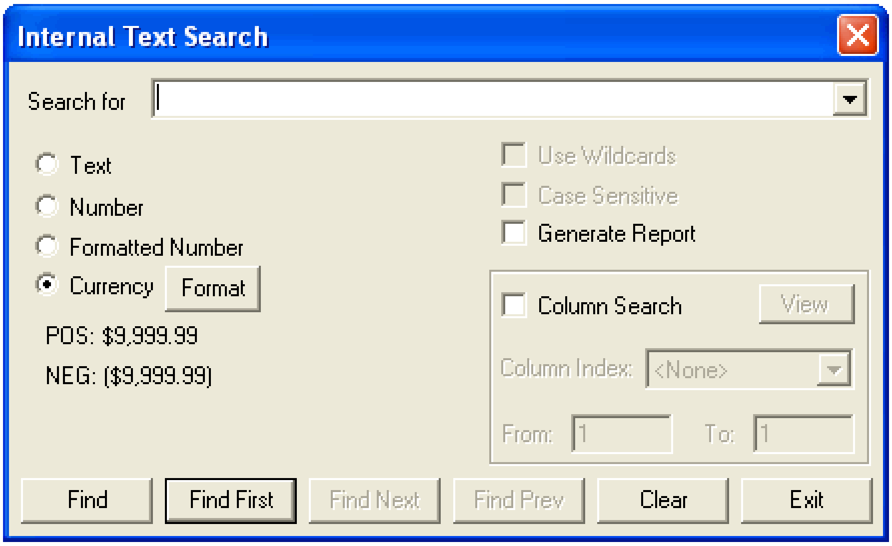
- Use the **Internal Text Search** dialog box
- Use the Text Search toolbar

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

Internal Text Search Dialog Box

1. From an open document, open the **Internal Text Search** dialog box using either of the following methods:
   - Right-click anywhere on the open document or the document's status bar and select **Text Search**.
   - Press **Ctrl-F3**.

   The **Internal Text Search** dialog box is displayed.



2. Define your search options.
   For more information, see Text Search Options on page 304.
3. Click **Find.** The first occurrence, or hit, for your search string is highlighted in the open document.
4. Click **Find Next** or **Find Previous** to view other occurrences of your specified search string. You can also use any of the previously used search strings listed in the **Search for** drop-down list.

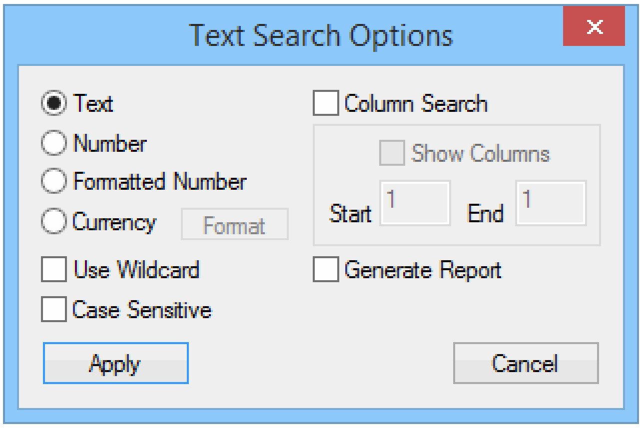
Note: If your document contains one or more **Tab** characters or different types of **Space** characters (such as Ideographic Spaces), your search string may not be correctly highlighted in the document.

5. A search report in the **SYS Search Report** Document Type is generated each time an Internal Text Search is performed.

Text Search Toolbar

Open the Text Search toolbar by selecting **User | Toolbars | Text Search Toolbar**. The toolbar is only enabled for open text documents.

Define or limit your search options by clicking the **Text Search Options** button.



After configuring your options, click **Apply** to save the configuration and exit the **Text Search Options** dialog box.

The Text Search toolbar retains search strings from previous searches. You can select a saved search string from the Text Search toolbar drop-down list to perform identical searches on additional text documents.

After you close a document for which you specified Text Search criteria, the Text Search toolbar retains the search criteria until you change it or close the Client module.

To conduct an Internal Text Search from the Text Search toolbar,

1. Type a search string in the Text Search toolbar field, or
   Select a previously entered search string from the drop-down list.
2. Press **Enter**.
   OnBase highlights the first occurrence of the text string in the open document.

Note: If your document contains one or more **Tab** characters or different types of **Space** characters (such as Ideographic Spaces), your search string may not be correctly highlighted in the document.

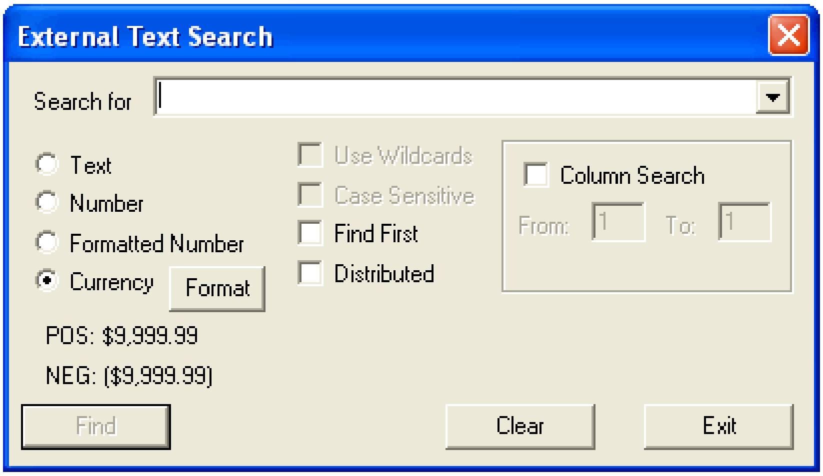
3. Use the other Find buttons in the **Text Search Toolbar** to move up or down the open document and locate the previous or next occurrence of your search string:
   - **Find First**
   - **Find Next**
   - **Find Previous**

External Text Search

The External Text Search function allows you to search for text across text-based documents. The Text Search Results list displays documents that contain the search string, as well as the number of times that search string occurs in each document. When you open a document from a hit list, OnBase highlights the search string in the document.

Conducting an External Text Search

1. From the Document Retrieval dialog box, select the Document Type(s) you want to search.
2. From the **Document Retrieval** dialog box, click **Text Search**.
   The **External Text Search** dialog box displays.



3. Define your search options.

   For more information, see Text Search Options on page 304.

4. In the **Search for** field, type the text string you want to search for.

Note: If your document contains different types of Space characters (such as Ideographic Spaces), your search string may not be correctly highlighted in the document.

5. Click **Find**.

   A status bar displays the search's progress. To cancel the search, click the **Cancel** button.

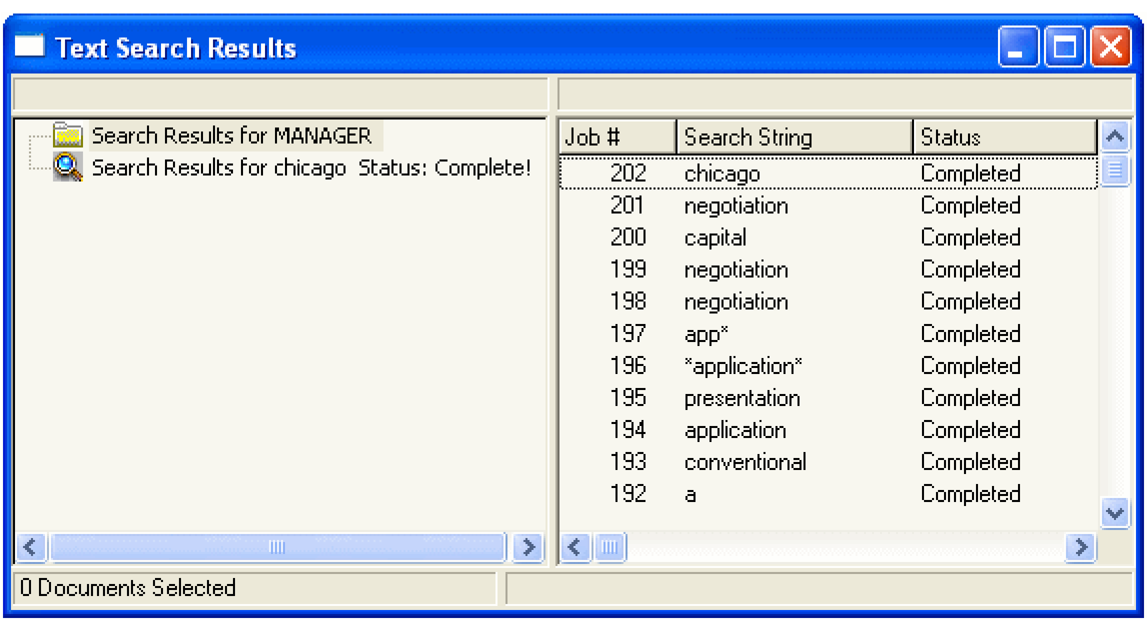
   When the search is complete, the Text Search Results list displays.

Note: External Text Search results can be accessed by selecting **User | Text Search Results**. Search results from previous sessions are available.

The Text Search Results Window

The **Text Search Results** list displays after a search has been completed. The left side of the window displays your user name. The right side of the window displays the **Job Number**, **Search String**, and **Status**.

- The **Job Number** is a unique number identifying the search.
- The **Search String** is the text string for which to be searched.
- The **Status** in the **Text Search Result** dialog box indicates whether or not the job search has been completed. When a search has been completed, the status is **Completed**. An **In Progress** status indicates a distributed text search with results that have not yet been returned.

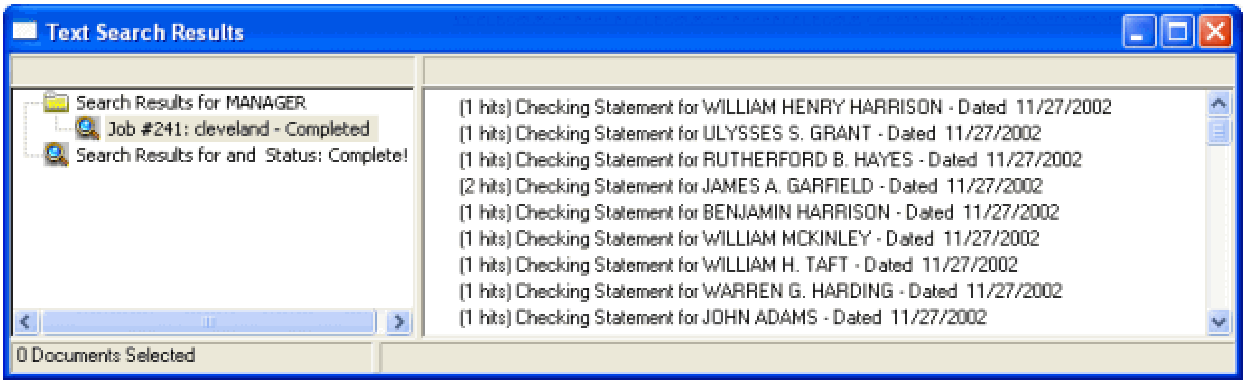


Viewing Text Search Results

To view Text Search Results,

1. Double-click on the job number or search string you want to view.

   The Text Search Results list displays documents containing the search string as well as the number of times the search string occurs in each document.



2. Double-click a document from the list to display a list of all occurrences of the search string in the document. From here, you can also right-click and drag a document to an Envelope, Folder, or to the EDM Briefcase (if licensed).
3. Double-click an occurrence of the search string. The document opens with the selected occurrence of the search string highlighted.

Considerations for Viewing Text Search Results

When opening a text search result, consider the following:

- The search string may not be correctly highlighted in the document when the document contains one or more **Tab** characters.
- The search string may not be correctly highlighted in the document when the document contains double-byte characters (for example, Japanese and Chinese characters).
- The search string may not be correctly highlighted in the document when the document contains different types of **Space** characters (such as Ideographic Spaces).
- The search string is not highlighted when the search string text is outside the viewable area. A plus sign (**+**) at the end of the row the text appears in is highlighted, indicating the text exists and was found in that row but cannot be displayed. For more information on the viewable characters per line, see your system administrator.
- Depending on the configured characters per line, when resizing the viewer on an opened result, the highlight may be removed from the search string or plus sign (**+**).
- The image rendition for the document may be opened instead, depending on system settings. For more information on rendition display behavior, see your system administrator.

Right-Click Options

If you have sufficient privileges, the following right-click options are available in the Text Search Results list when one or more jobs, documents, or hits are selected:

- **Create Report** creates a report of the search results, which is stored in the **SYS - Search Reports** Document Type. For more information, see Generating A Report on page 311.
- **View Selected**, when selected from the:
  - Job list, displays a list of documents returned by the search.
  - Document list, displays a list of hits for the selected document.
  - Hit list, opens the document with the selected hit for the search string highlighted.

Note: If your document contains one or more **Tab** characters or different types of **Space** characters (such as Ideographic Spaces), your search string may not be correctly highlighted in the document.

- **Clear Selected** clears/deselects the selected items.
- **Delete Selected** removes the text search result from the Text Search Results list.
- **Print | Print Selected** prints the selected document(s) from the Text Search Results list.
- **Print | Print All** prints all documents from the Text Search Results list.
- **Refresh** updates the Text Search Results list.

Note: External Text Search Results are stored in the database and can be accessed by selecting **User | Text Search Results**. Text Search Results are "cross-session," which means the search results from previous sessions are available when you log back on to the system.

Text Search Options

Item	Description	Internal or External Text Search Option
Text	Searches for alphanumeric text. **Tip:** If you are searching for a number and want to use wildcards in the search, select the **Text** option. This enables the **Use Wildcards** option.	Internal and External Text Search

Item	Description	Internal or External Text Search Option
Number	Searches for numeric values and allows the use of the following operators to limit the search: **>**, **<**, **>=**, and **<=**. The **to** operator can also be used to search for a range of values. **Note:** Results with leading zeros are only returned when you include the leading zero in the search. For example, a search for **7** would not return results for **07**. **Note:** OnBase is not designed to search for negative numbers. Executing a **Number** search for a negative number will return no results, even if the negative number is in the document.	Internal and External Text Search
Formatted Number	Searches for numeric values that use formatting characters. For example, to search for all Social Security Numbers greater than 800-000-000, type **> 800-00-0000** in the **Search String** field. This option allows the use of the **>**, **<**, **>=**, and **<=** operators to limit the search and the **to** operator to search for a range of values. **Note:** When you search for formatted numbers greater or less than the entered search string, formatted numbers followed by periods are not included in the search results. **Note:** OnBase is not designed to search for negative numbers. Executing a **Formatted Number** search for a negative number will return no results, even if the negative number is in the document.	Internal and External Text Search
Currency	Searches for numbers that use currency formatting. Click the **Format** button to access the formatting options. See Currency Keyword Formatting Options for the Client on page 309 for more information.	Internal and External Text Search

Item	Description	Internal or External Text Search Option
Use Wildcards	Select the **Use Wildcards** check box to use wildcard characters in a text string. A **wildcard** is a special character that represents one or more unspecified (variable) characters in a text string. • The **?** wildcard represents a single character in the text string. For example, a search for "Sm?th" will find all instances of both "Smith" and "Smyth". • The ***** wildcard represents multiple unspecified (variable) characters at the beginning or end of a text string. For example, the text string "Ols*" will find all instances of both "Olsen" and "Olson." If this option is not selected and you use wildcard characters in the text string, the wildcards are treated as literal characters. **Note:** If more than one item on a document meets the wildcard search criteria, that document can be returned multiple times. **Note:** You cannot conduct a text search using only wildcard characters.	Internal and External Text Search
Case Sensitive	Select the **Case Sensitive** check box to limit the search to text that matches the case of the text string. Text searching is not case sensitive by default. For example, the text string "weaver" will find both "weaver" and "Weaver".	Internal and External Text Search
Find	Click **Find** to locate each instance of the text. During an internal search, the found text is highlighted in the open document. During an External Text Search, all documents containing the text string are displayed in the Text Search Results window.	Internal and External Text Search* *Available in the right-click Internal Text Search dialog box only, not in the internal Text Search Toolbar.
Find First	During an Internal Text Search, **Find First** locates the first instance of the text. Pressing **Enter** after typing the text string also performs the **Find First** function. During an External Text Search, **Find First** limits the number of hits in each document search to one, which limits search time. If **Find First** is not selected, each document is searched until all hits are found.	Internal and External Text Search

Item	Description	Internal or External Text Search Option
Find Next	Locates each subsequent instance of the text string in the document. When performing an Internal Text Search from the right-click menu this option is only available after the first instance of the text is found. When performing an Internal Text Search from the Text Search Toolbar, this button is enabled immediately.	Internal Text Search Only
Find Prev	Returns to each previously found instance of the text.	Internal Text Search Only
Distributed	The **Distributed** option performs an external text search on a network search server (as opposed to a local machine).	External Text Search Only
Generate Report	Text search results can be generated as system reports. The system report is stored as a document in the **SYS Search Reports** Document Type. For more information on this option, see Generating A Report on page 311. **Note:** This option is not available if you are executing a **Column Index** search.	Internal and External Text Search
Column Search	Select **Column Search** to limit the search to a column range in the document. For example, to search for text strings that appear in columns 20 through 50, enter 20 and 50 in the **From** and **To** (or **Start** and **End**) fields, respectively. The column of characters at the far left of the document is **1**, the next column to the right is **2**, and so on.	Internal and External Text Search
View/Hide and Show Columns	You can highlight the columns you have selected to search in your document. When using the **Text Search** right-click menu option, click **View** to highlight the selected columns. Click **Hide** to remove the highlight. When using **Text Search Options** from the Text Search Toolbar, select **Show Columns** to highlight the selected columns. De-select **Show Columns** to remove the highlight.	Internal Text Search Only

Item	Description	Internal or External Text Search Option
Column Index	To limit your search using a column index, select the column index from the drop-down list. Column indexes are pointers to pre-identified blocks of text within a COLD-processed document. If you are searching a document that has one or more column indexes, you can limit your search to the selected column index. **Note:** This option is available only from the **Text Search** right-click menu option and only if the document has been column-indexed.	Internal Text Search Only
Clear	Click the **Clear** button to clear any selected options.	Internal and External Text Search
Exit	Click the **Exit** button to close the dialog box.	Internal and External Text Search

Currency Keyword Formatting Options for the Client

The Currency Format for Keyword Types configured in a process must match the format of currency in the process file. Some dialog boxes in the Client allow you to specify currency formats, such as Internal and External Text Searching. When clicking on the Format button, the Currency Format dialog box displays. See the table below for a description of General Formatting options.

General Formatting	
The characteristics defined in the General Formatting section apply to both positive and negative currency values. **Note:** Depending on your Currency Format dialog box, you may see a field for ISO formats. You may enter your currency's ISO format (Example: JPY for Japanese Yen, USD for U.S. Dollar). The ISO format Identifier field is used for reference only.	
Use Currency Symbol	Select this option if the value uses a currency symbol, such as a $. Type the symbol used in the **Symbol** field. **Note:** A space in place of a currency symbol is not supported within the Client.
Use Digit Grouping Symbol	Select this option if the value uses a digit grouping symbol. A comma (,) is commonly used as a digit grouping symbol (e.g., 1,000,000).
Digits in Group	Identifies the number of symbols that are separated by a digit grouping symbol. This number is commonly 3 (e.g., 1,000,000), but can accept 0-6.
Decimal Symbol	Identifies the symbol used to identify decimal value spacing. This symbol is commonly a period (.) (e.g., 1,000,000.99).
Decimal Places	Identifies the number of digits that follow a decimal symbol. This number is commonly 2, but can accept 0-6 when configuring a process. In all other instances, only 0-2 is accepted. **Note:** Currency Keyword Values can only accept 16 digits to the left of a decimal place.

Positive Numbers	
Symbol After Number	Select this option for positive numbers in which the currency symbol (that was specified in the **Symbol** field) appears after the number (e.g., 1,000.00$).
Add Space for Symbol	Select this option if there is a space in the text between the number and the currency symbol (e.g., $1,000.00).

Negative Numbers	
Negative Indicators	Select the character that identifies the value as a negative number. **Minus Sign** (-) or **Parentheses** ( ).
Indicator After Number	Select this option if the negative indicator symbol appears after the value. Applies to minus sign (-) only.
Symbol After Number	Select this option if the currency symbol appears after the negative number.
Symbol Inside Indicator	Select this option if the currency symbol appears after the value and before the indicator (e.g., 1,000,000 $ -). Applies to minus sign (-) only.
Add Space for Symbol	Select this option if a space ( ) appears after the currency symbol. (e.g., - $ 1,000,000).

Make Default

Click Make Default to make the settings your system default currency settings.

Note: This default is saved on a workstation basis. When other users log onto the workstation, they will have the same default currency settings.

Note: When users index documents using currency formatted Keyword Values, and enter a number that contains more than two decimal places, the system truncates the number to two decimal places. For example, if a Keyword Value is indexed with the number $88.109, the Keyword Value displays $88.10.

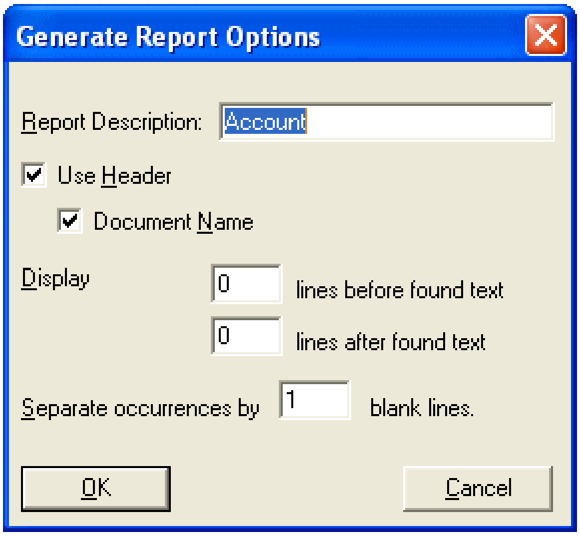
Generating A Report

Text search results can be generated as system reports. The system report is stored as a document in the **SYS Search Reports** Document Type. To generate a report:

1. For an Internal Text Search, you should select the **Generate Report** check box and click **Find** to start a search.

   For an External Text Search, you should run your search, then right-click on the job and click **Create Report**.

   In both cases, the **Generate Report Options** dialog box is displayed:

2. Enter a name for the generated report as the **Report Description**. This report name appears as the **Description** Keyword Value on the report.
3. Select **Use Header** to generate a header in the report.
4. Select **Document Name** to include the name of the document, as it is shown in the Document Search Results list.
5. In the **Display** section, enter the number of lines of text to show above and below the found text in the **lines before found text** and the **lines after found text** fields.
6. Enter the number of blank lines to display between hits in the **Separate occurrences by x blank lines** field.
7. Click **OK** to generate the report or **Cancel** to exit without generating a report.
8. For External Text Searches, the generated report is displayed. For Internal Text Searches, the generated report is displayed after the search is complete. In both cases, this report is stored in the **SYS Search Reports** Document Type.

Viewing and Modifying Keywords

Keywords enhance the functionality of OnBase by providing the ability to quickly identify the important characteristics of documents and folders by a descriptive value assigned to the document or folder.

Two parts comprise Keyword functionality; Keyword Types and Keyword Values.

Accessing an Existing Document's Keyword Values

Some documents have one or more Keyword Type Values displayed automatically when you open the document. These Keyword Types are configured by your system administrator to Auto-Display.

For more information, see Auto-Display for Document Keyword Types and Values on page 317.

Note: You may use the right-click **Copy** and **Copy All** functions on Keyword Values in the Auto-Display window on the document.

1. To open the **Add / Modify Keywords** dialog box and access a document's Keyword Values, perform one of the following functions:
   - Click the **View or Modify Keywords** toolbar button
   - Right-click on the open document, or the document's status bar, and select **Keywords**.
   - Selecting a document from a document retrieval list and select **Document | Keywords**

The **Add/Modify Keywords** dialog box displays. From the **Add/Modify Keywords** dialog box, you can view or edit Keyword Values, depending on your User Groups and Rights and the Document Type of the document. Some Document Types are configured to Disable Keyword Editing, which renders a document's Keyword Values read-only.

Adding and Modifying Keywords

Use the **Add / Modify Keywords** dialog box to view or modify the document Keyword Values. Right-click an open document or a document name from a Document Search Results list and select **Keywords**.

The title line of the **Add/Modify Keywords** dialog box displays information about the document. The first two lines display the **Document Type** and document name respectively.

Note: If this document is checked out by another user, the Keyword Values will not be able to be modified regardless of privileges. The Add / Modify Keywords dialog box will be displayed, but all Keyword Values will be read-only.

Note: You cannot change Keyword Values on E-Forms that have been signed. When a form is signed, the Add/Modify Keyword dialog box becomes read-only and the re-index menu option is disabled for the form.

Note: The Add/Modify Keywords dialog box allows you to resize it. Save the resized dialog box by clicking the **Save** button.

Document Date

The **Document Date** field displays the date the system matches in a search for documents based on a date or date range. You can change the date.

Dates use the Windows Regional Settings for formatting.

Keywords

The **Keywords** section displays the Keyword Types and Keyword Values currently associated with the document. The Keyword Value is blank if no Keyword Value is currently assigned.

You can use the **Add / Modify Keywords** dialog box to remove, change, or add a Keyword Value:

- To remove a Keyword Value from a document, delete the contents in the Keyword Type field.
- To change the value, edit the Keyword Value currently residing in the Keyword Type field
- To add another value for a Keyword Type, place the cursor in the Keyword Type field and press **F6,** or double-click the Keyword Type name. An additional field is displayed for the Keyword Type. Fill in the additional Keyword Value.

  For additional information on Function Keys, see Keyword Type Field Function Keys on page 384.

You cannot duplicate Keyword Types in Single-Instance Keyword Type Groups or Cascading Data Sets.

If you duplicate a Keyword Type within a Multi-Instance Keyword Type Group, another instance of the entire Multi-Instance Keyword Type Group will be added, not just the Keyword Type. This is because all Keyword Types within the Multi-Instance Keyword Type Group are part of a record. When you choose to duplicate the Keyword Type, you must duplicate the entire record.

It is recommended that all Keyword Type Values are indexed when a Multi-Instance Keyword Type Group is duplicated, even if only one Keyword Value is different between the original Keyword Type Group and additional instances.

A calendar button is available next to date-based Keyword Types, allowing you to select a date from a calendar. A drop-down arrow may be available for some alphanumeric Keyword Types, allowing you to select a value from the Keyword Values in the list.

If a security mask is applied to one of the Keyword Types and you have the **Access Security Masked Keywords** privilege, the **View Security Masked Keyword** toggle button is available.

- To view security masked Keyword values without the security mask, click:

- To view security masked Keyword values with the security mask, click:

Drop-down arrows appear if the **Keyword Select List** check box is selected on the **General** tab of the **User Options** dialog box.

Note: In some instances, changing Keyword Values will affect the appearance of your document. Change Keyword Values carefully.

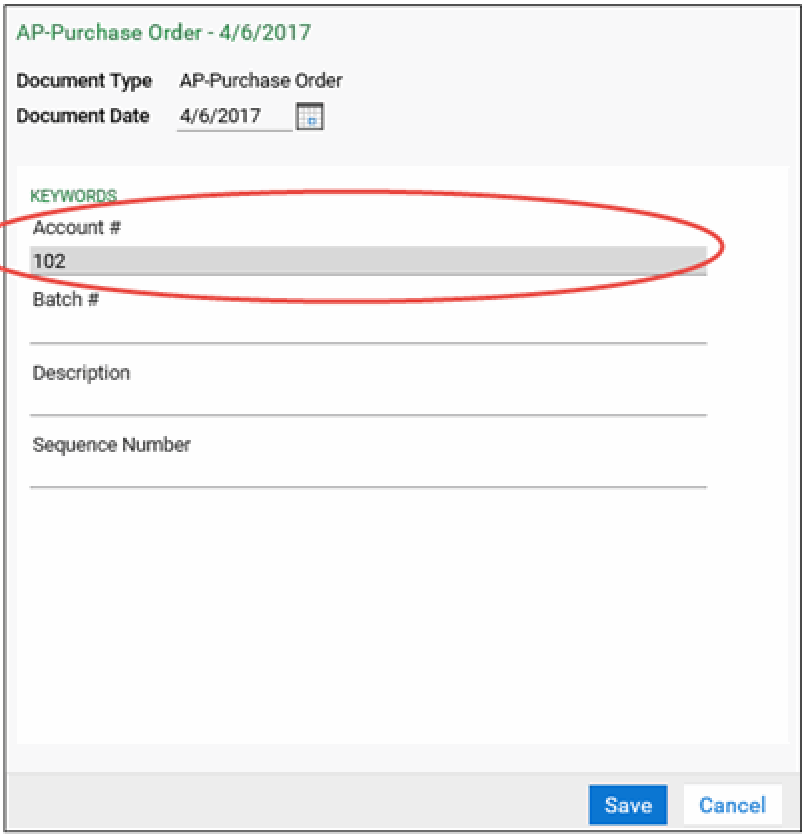
Viewing Read-Only Keywords

Sometimes you can view, but not modify some or all of the Keyword Values on a document.

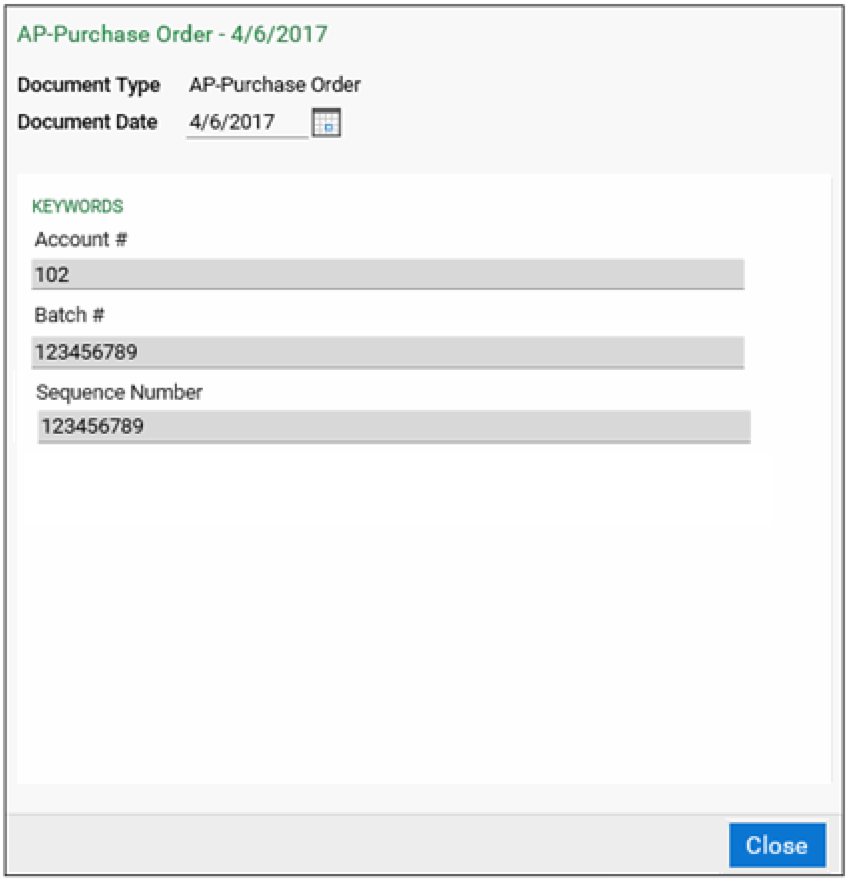
This can be for any of the following reasons:

- Keyword Types can be configured to appear as read-only, as well as masked, to certain User Groups. If this is the case, the **Add/Modify Keywords** dialog box will resemble the following:

  In the following example, the **PO #** Keyword Type is configured as read-only at the Document Type level. The user is unable to modify this Keyword Value. The user is able to modify the other Keyword Values.



- The User Group that you belong to does not have the right to **Modify** Keyword Values. The **Add/Modify Keywords** dialog box displays in read-only mode:



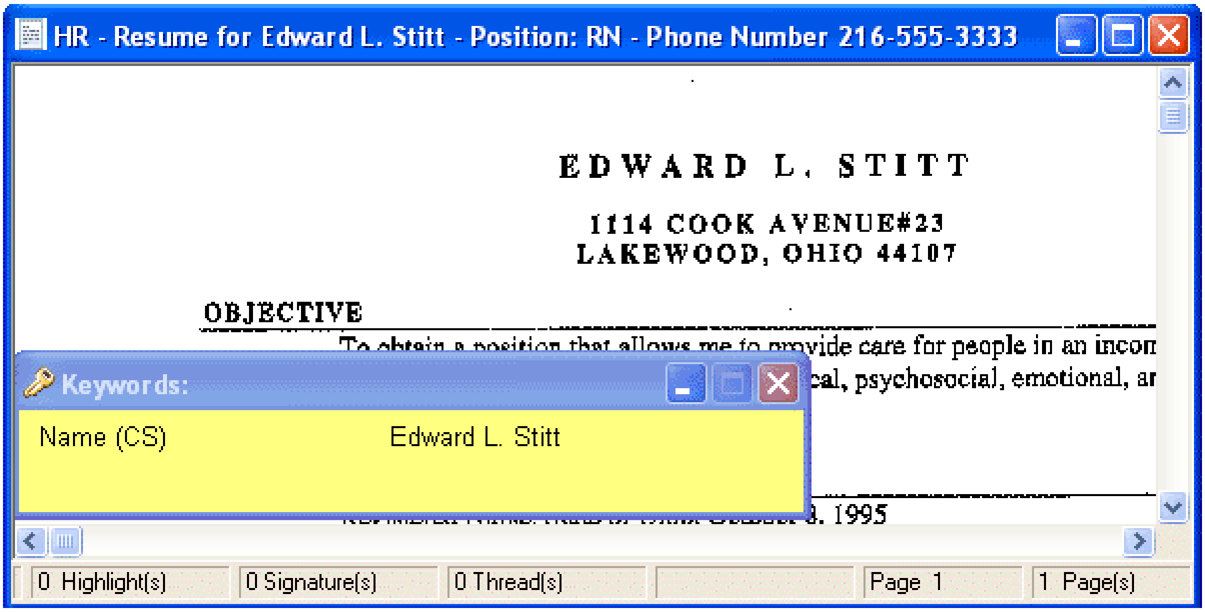
- When you elect to view Keyword Values on a document, OnBase displays a message that someone has the document checked out, or locked. The **Add/Modify Keywords** dialog box displays in read-only mode. Depending on your system setup, this happens if a document is checked out by another user, or if it is persistently checked out.

Note: When you open **Add/Modify Keywords** or the **Re-Index Document** dialog box, the document is locked for your use so you can modify Keyword Values and save the changes. The document is unlocked when the dialog box is closed. When another user attempts to Add/Modify Keyword Values or re-index and a document is locked, the user can view the Keyword Values, but not modify them.

Auto-Display for Document Keyword Types and Values

If one or more Keyword Types that belong to a Document Type are configured to auto-display, the Auto-Display Information dialog box will display the name of the Keyword Type(s) and the corresponding Keyword Value(s) for the displayed document. The following dialog box is an example of this type of display.

Note: Keyword Values may be displayed in uppercase or a mixture of upper and lower case depending on how the keywords are configured by the system administrator. Keyword Values may also be masked. **Date** or **Date & Time** Keyword Values are displayed according to the workstation's Regional Settings.



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

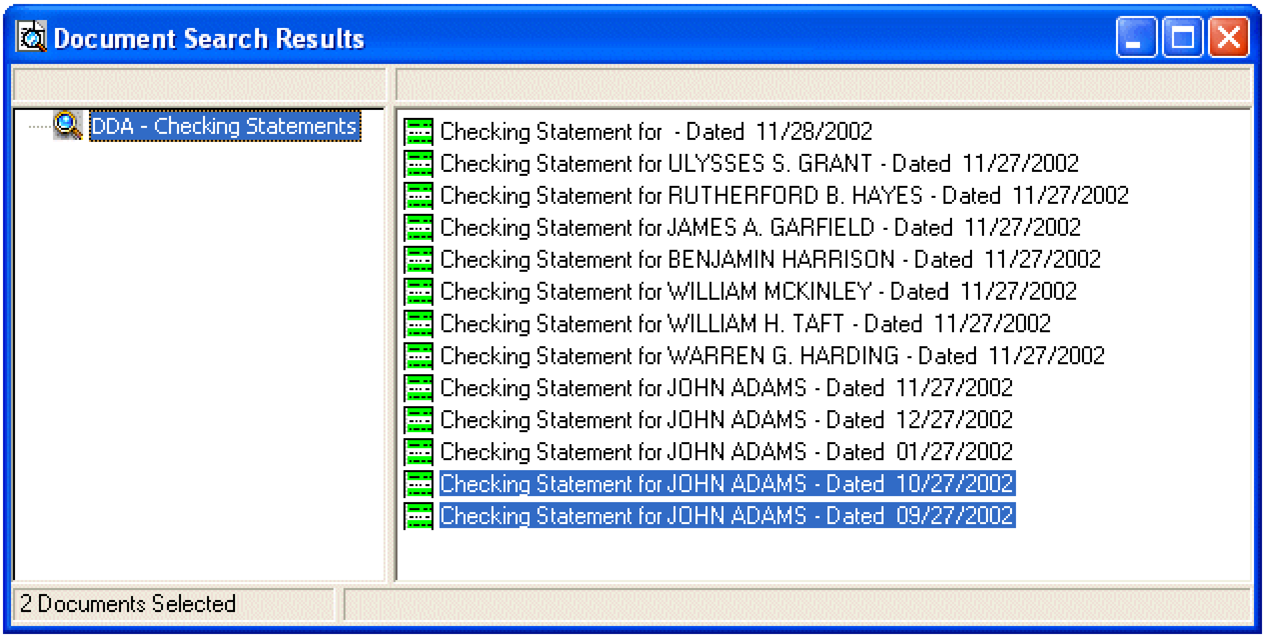
Modifying Keyword Values Across Multiple Documents

When you have two or more documents in OnBase that have identical keywords, you may be able to modify Keyword Values across all the documents at once using MultiDoc Keywords. This feature is useful if you have multiple documents with identical Keyword Values and you need to change one value or more across all documents.

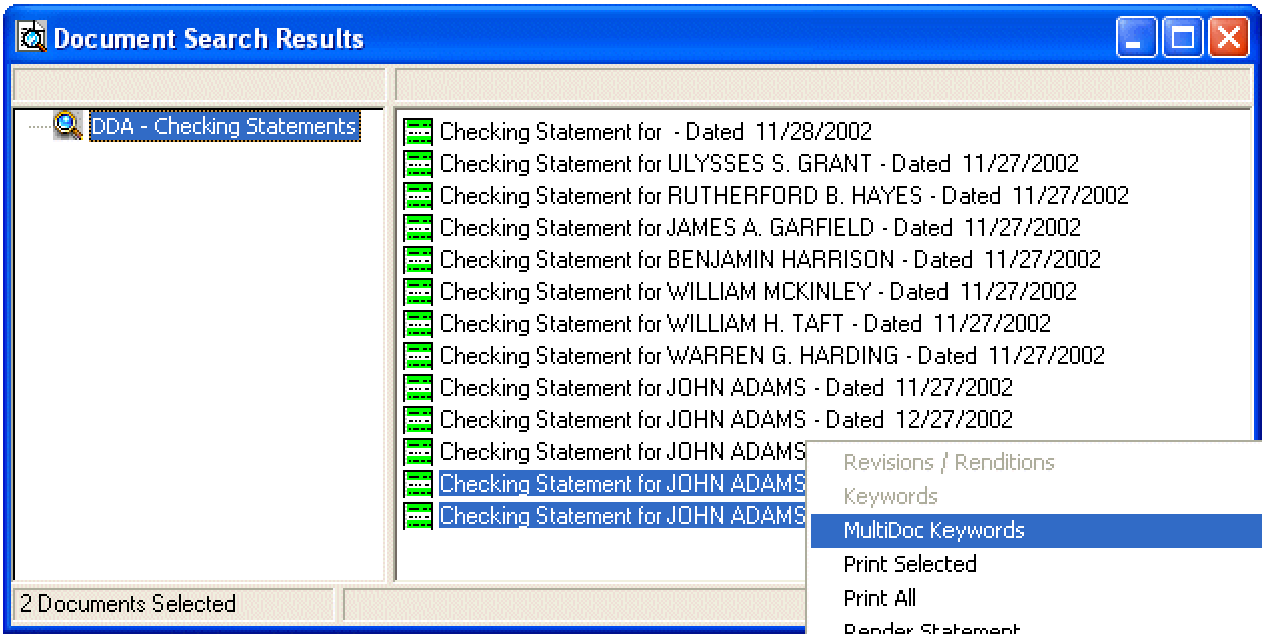
This feature must be activated by your system administrator. If this feature has been activated, the **MultiDoc Keywords** right-click option is available when you select multiple documents with matching Keyword Values from the Document Search Results list.

To access and modify Keyword Values on multiple documents with identical values:

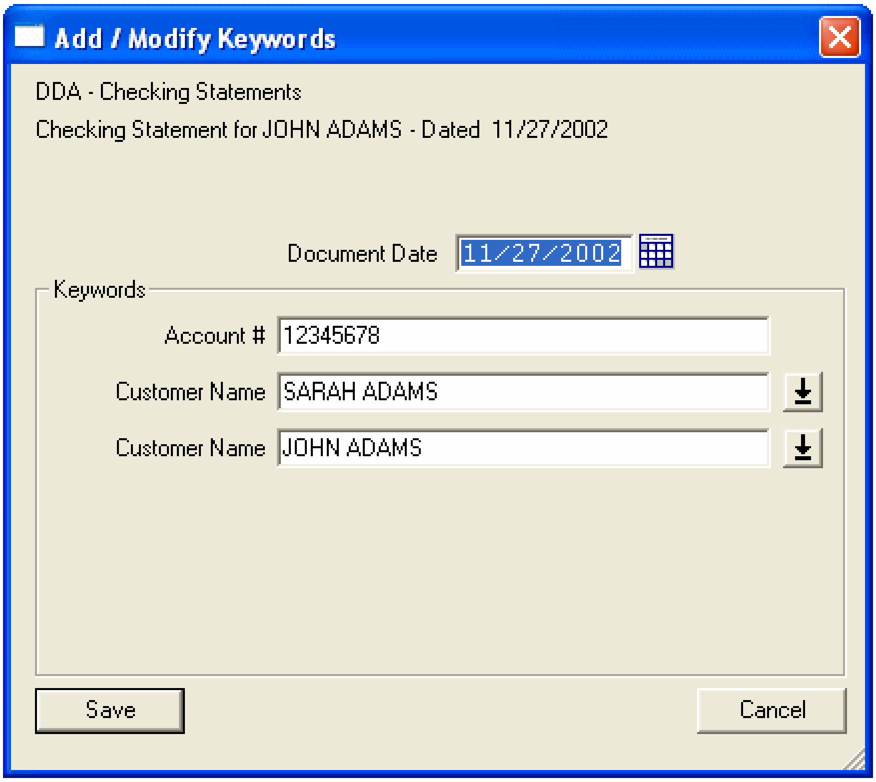
1. Retrieve multiple documents using the **Document Retrieval** dialog box.
2. From the **Document Search Results** window, select multiple documents that you know have matching Keyword Values.



3. Right-click to view the right-click options.



4. Select **MultiDoc Keywords** to display the **Add/Modify Keywords** dialog box.



5. View or modify the Keyword Values, if necessary.
6. Click **Save**.

Using OnBase Internal Mail

Note: For External Mail, see the External Mail Services documentation.

Internal Mail Overview

Internal Mail is useful for sending a message to another user of OnBase. When you attach documents to an internal email message, the system attaches a pointer to the actual document within OnBase. Because both mail and attachments are part of the system, documents retain all their system attributes (such as permissions, properties, keywords, document handle, right-click menus, and so on.) Internal Mail messaging also provides the ability for multiple users to view a particular document.

Note: You must have the Internal Mail privilege assigned in order to use Internal Mail.

Depending on your configuration, you may be notified about new Internal Mail messages when you log onto the system or when a user sends you new mail.

Clicking **Yes** on the notification dialog box will open your Internal Mail mailbox.

Sending Internal Mail

Internal Mail provides the ability to message other users and user groups inside OnBase.

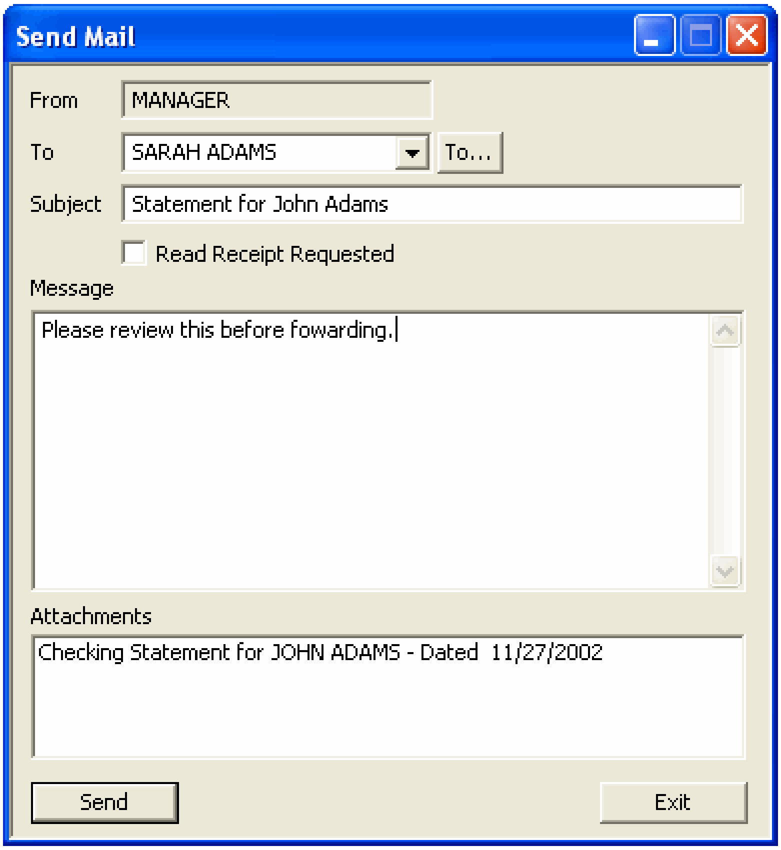
- Messages can include attached documents.
- Internal mail delivers messages to the user's internal mailbox. Depending on the configuration, he or she can be notified about new mail upon arrival or upon logging onto the system.

- If the system is licensed for External Mail Services, users can send email directly from this interface. For more information see the External Mail Services Help.

Note: Depending on how your system is configured, a user without rights to an attachment's Document Type may not be able to view the attachment. If the user is able view the attachment but does not have rights to the Document Type, **Add/Modify Keywords** and **Re-Index** options will be unavailable, but the user will be able to add notes and annotations to the document.

1. Open the **Send Mail** dialog box. Access the dialog box using one of the following methods:
   - Click the **Mail Document (Internal)** toolbar button from the OnBase Client toolbar to open the **Send Mail** dialog box.
   - Right-click from an open document and select **Send To | Mail | Internal User** to open the **Send Mail** dialog box with that document as an attachment.
   - Select one or more documents from a Document Search Results list, right-click and select **Send To | Mail | Internal User** to open the **Send Mail** dialog box with those document(s) as attachments.
   - Right-click on an envelope and select **Send To | Mail | Internal User** to attach all documents within the envelope.

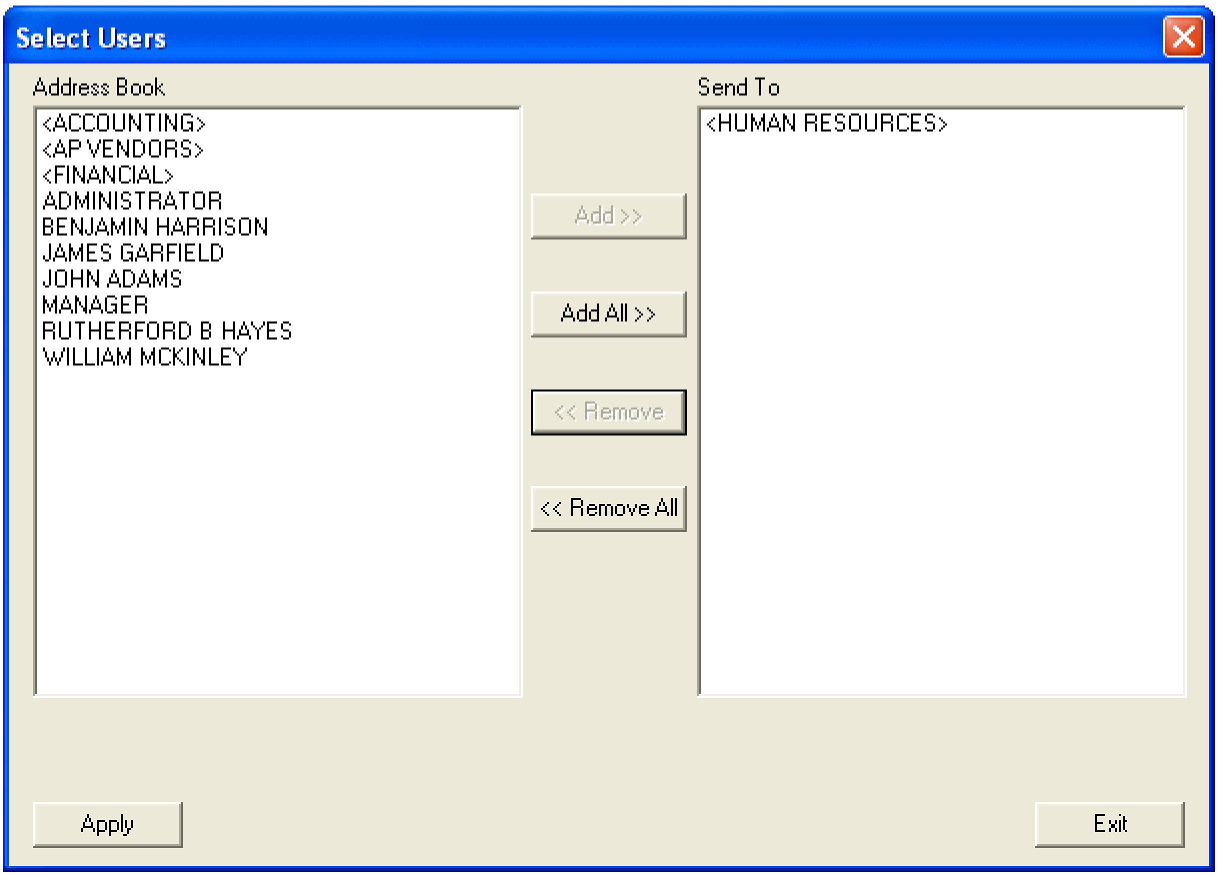
   The **Send Mail** dialog box is displayed.



2. To send mail to an individual recipient, enter the recipient's OnBase user name in the **To** field, or select the recipient from the **To** drop-down list and skip to step 4.
3. To send mail to multiple recipients or User Groups, use one of the following methods:
    - Enter the recipients' OnBase user names in the **To** field with each user name or address separated by a semi-colon (;).

Note: Although only the first user name in the **To** field is resolved, the message is sent to all valid user names entered in the **To** field.

- Click **To**. The **Select Users** dialog box is displayed, allowing you to select multiple recipients.



Note: User Group names display nested within **<>**, differentiating them from individual user names. When you send message to a User Group, the message is sent to all members of the User Group.

Select recipients for the mail message. Note that any user names you previously entered in the **To** field have already been added to the **Send To** list. All email addresses are pushed to the end of the **Send To** list.

- To add recipients, select the user(s) or User Group(s) from the **Address Book** and click **Add**.
- To add all users and User Groups in the **Address Book**, click **Add All**.
- To remove a recipient, select the email address, user or User Group from the **Send To** select list and click **Remove**.
- To remove all recipients from the **Send To** select list, click **Remove All**.

To save changes and return to the **Send Mail** dialog box, click **Apply**.

Note: User names in the **To** field are resolved and separated by semicolons, even if they were not previously resolved before opening the **Select Users** dialog box.

Note: Internal mail cannot be sent to user names that contain a semicolon.

4. Type a subject for your message in the **Subject** field.

Note: Subject lines can contain up to 100 characters and the **To** field can contain up to 30 characters.

5. Select **Read Receipt Requested** if you require a read receipt.
6. Enter a message of up to 249 characters in the **Message** field.
7. Click **Send**.

Forwarding Internal Mail

You can forward internal mail, including any attachments, to other users and user groups in OnBase.

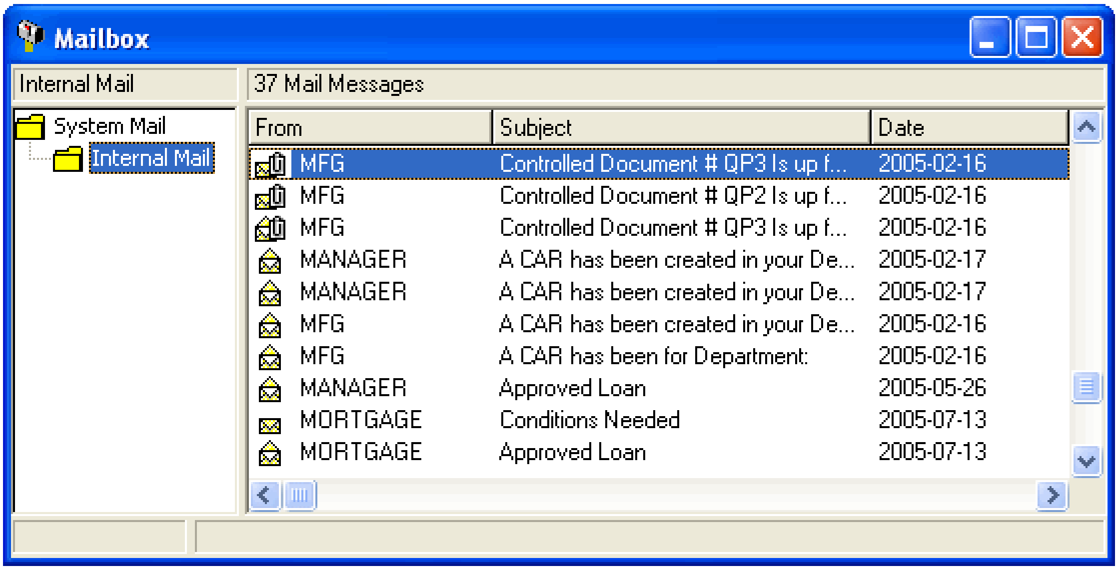
To forward an internal mail message:

1. Open a message you wish to forward in your **Mailbox**.
2. Click **Forward**. The **Send Mail** dialog box is displayed.
3. Enter one or more recipients for the message in the **To** field.

   For more information on how to select a recipient or recipients, see Steps 2 and 3 in Sending Internal Mail on page 320.
4. Click **Send**.

Viewing Internal Mail

The Mailbox window enables you to view your Internal Mail messages within the OnBase Client module.



To access the **Mailbox** window, select **User | Mailbox** in the Client module. The left side of the **Mailbox** window contains a **System Mail** and an **Internal Mail** folder. The **Internal Mail** folder is selected by default. If the **System Mail** folder is selected when the **Mailbox** window is closed, it will remain selected if the **Mailbox** window is re-opened during the same OnBase session. If the Client module is closed, the **Internal Mail** folder will again be selected when the Client module is relaunched.

The right side of the **Mailbox** window lists all email messages contained in the folder. You may sort your mail by clicking on the **From**, **Subject** or **Date** columns of the Mailbox dialog.

Note: Because attached documents retain the permissions set in the system, if you do not have permission to view the document, you will see the attachment, but you will not be able to open it.

Menu Options

- **View Selected**
  You can view a single email message by double-clicking on the message, or selecting the message and clicking **View Selected** from the right-click menu. To view multiple messages, select the messages and click **View Selected** from the right-click menu.
- **Delete Selected**
  To delete one or more email message(s), select the message(s) and click **Delete Selected** from the right-click menu.

- **Refresh**
  Click **Refresh** from the right-click menu of a selected message to update the list of e-mail messages at any time.

Note: If a document has been deleted from the system after it has been sent, the recipient can still view the document unless it has been purged from the system by your system administrator.

You can set your User Options to open the mail window on startup and/or display a notification when you receive new mail. To do this:

1. In the Client module, select **User | User Options**.
2. Click the **Startup** tab.
3. Select the **Mail** check box.
4. Click **OK**.

Available Document Options and Right-Click Menus

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

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

Note: The options available will depend on the document from which options are accessed. Additional options are available if other modules are licensed in addition to the OnBase Client module. In some cases, such as when documents open in external viewers not controlled by OnBase, the right-click menu is not available.

Click an option displayed below to view information on it.

Display Options

Overlay

Change Font

No Style Sheet

Scale | Zoom In

Scale | Zoom Out

Scale | Actual Size

Scale | Fit in Window

Scale | Fit Width

Scale | True Size

Process | Rotate Right

Process | Rotate 180

Process | Rotate Left

Process | Save Rotation

Process | Flip Horizontally

Process | Flip Vertically

Process | Invert

Display | Normal

Display | Preserve Black

Display | Scale to Gray

Image Zooming | Save Zoomed Area

Image Zooming | Reset Zoomed Area

Reset

Renditions

Thumbnails

View Thumbnails Only

Ruler

Disable Vertical Scroll Bar

Refresh

Document Options

Re-Index Document

Select Method

View Selected:

- In Internal Mail
- In Envelopes
- In an External Text Search

Clear Selected

Text Encoding

Text Lock

Print All or Print Selected

Print

Print Preview (E-Forms only)

Redacted Image | Create Redacted Bitmap

Redacted Image | Create Redacted Image

Deleting Redaction Bitmaps

Delete/Reorder Pages

Delete Document

Delete Selected:

- In Delete/Reorder Pages
- In Envelopes
- In Internal Mail
- In External Text Searching
- In Folders

View Notes

Add Note

Delete Notes

Create Highlight

Navigating Documents

Cross-Reference(s)

Next Document

Previous Document

Go to Options

- Go to Line
- Go to Page
- Set Page Numbers

Locate Document

Show Folder Locations

Send/Export Options

Send To | Mail | Mail Recipient (as Attachment)

Send To | Mail | Mail Recipient (as Zip File)

Send To | Mail | Mail Recipient (with Advanced Options)

Send To | Create New Document

Send To | Mail | Internal User

Mail Selected as Attachment

Copy (Page) to Clipboard

Save Selected As

Append to Envelope

Generate CSV File

Document Information

Keywords

Properties

Personalizing Your OnBase Client

Changing Your Password

Depending on your system's configuration, you may be able to change your OnBase login password.

1. In the Client module, select **User | Change Password**.
2. Type your current password in the **Old Password** field.
3. Type your new password in the **New Password** field.
4. Re-type your new password in the **Verify New Password** field.
5. Click **OK** to save. Click **Cancel** to exit without changing your password.

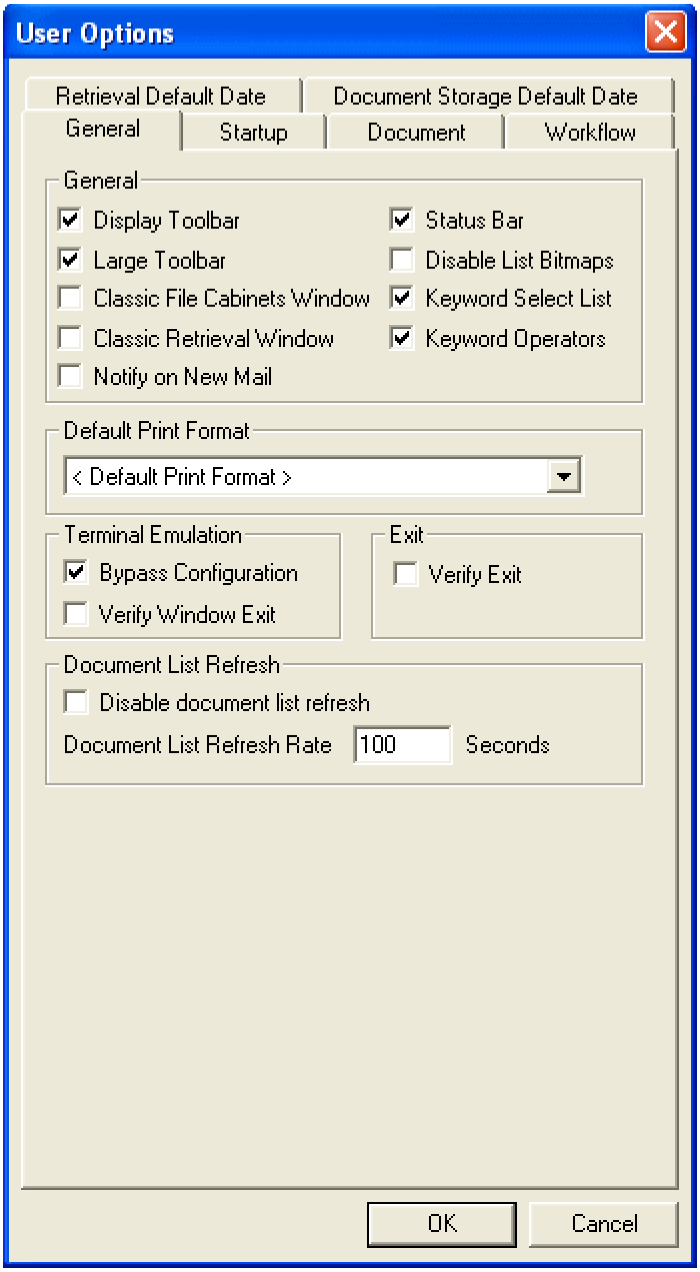
Modifying Your User Options

Through the **User Options** dialog box, you can customize the appearance and system functionality for each user. Since these settings are assigned per user, they remain in effect at any workstation.

To access the **User Options** dialog box, you may either:

- Click the **User Options** Toolbar Button, or
- Select the **User | User Options** menu, or
- Right-click on the Client module desktop and select **User Options**.

The **User Options** dialog box displays with the **General** tab selected by default.



You can save user-specific settings in each of the following tabs:

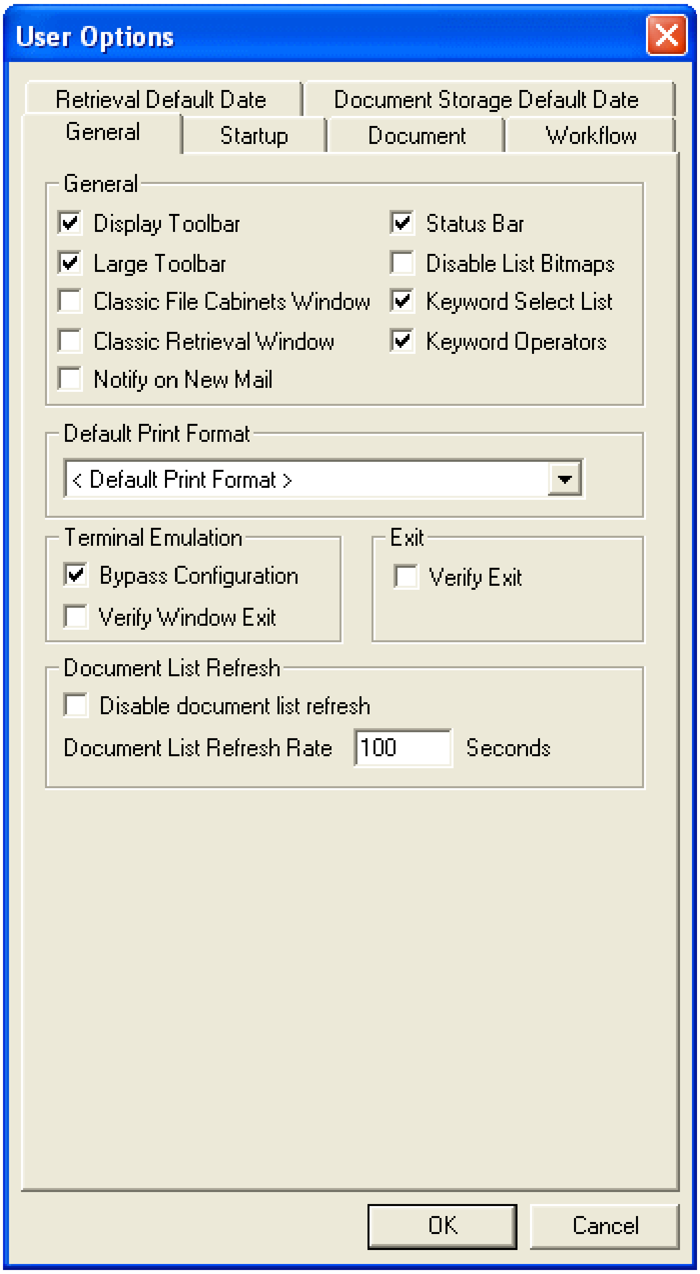
- **General Tab:** define OnBase Client module display preferences and general behavior.
- **Startup Tab:** control the appearance and display of certain Client module features at startup.
- **Document Tab:** define the characteristics or defaults of the documents retrieved in the Client module.
- **Retrieval Default Date Tab:** set the default date for retrieving documents in the Client module.

- **Document Storage Default Date Tab:** set the Document Default date for Client module processes such as COLD, DIP, TIP, Scan, etc.
- **Workflow Tab** - works in conjunction with the **Workflow** module. If you are not licensed for the Workflow module, you may not see this tab or this window may not list any workflows.

Note: Refer to the **Workflow** documentation or see your system administrator for license-related issues.

Modifying User Options: The General Tab

General options control OnBase Client module display features and general behavior. To configure **General** options, select **User | User Options**. The **General** tab is selected by default.



General

The **General** options control global features of the OnBase Client module.

Check Box	Action When Selected
Display Toolbar	Displays a toolbar under the main menu. The toolbar is composed of buttons that perform major system functions.
Large Toolbar	Displays a larger toolbar for easier viewing.
Classic File Cabinets Window	Displays the Classic File Cabinets Window for File Cabinets and Folders. If not selected, the system automatically displays the Advanced File Cabinets Window.
Classic Retrieval Window	Controls the appearance of the Document Retrieval dialog box when you first start up the system. Select this checkbox if you want the Document Retrieval dialog box to display the **Classic View**. By default, this checkbox is deselected, that is, the Document Retrieval dialog box is set to display in the **Vertical View.**
Notify on New Mail	Opens a pop-up message that alerts you of new mail.
Status Bar	Displays the System Window Status Bar at the bottom of the main system window under the document Status Bar. The System Window Status Bar displays context-sensitive help in the left corner (descriptions of items as you hover over them with the mouse). It also displays in the right corner whether or not the Caps Lock, NumLock or ScrLk keys are enabled on the keyboard.
Disable List Bitmaps	Hides the small icons that appear next to documents listed in a select list. The primary benefit of disabling the list bitmaps is a faster loading time.
Keyword Select List	Displays Keyword Value search fields with a drop-down list containing values defined by your system administrator.
Keyword Operators	Adds a drop-down list of advanced Keyword Value operators such as =, >, <, etc. to the left of a Keyword Type field. Adds a button to the right of the Keyword Type field where you can specify **AND** and **OR** logical operators.

Default Print Format

Select a **Default Print Format** from the drop-down list. This setting determines which Print Format is selected by default in the **Print** dialog box when you print documents.

When you print from a Document Type that has an assigned Print Format, the Document Type's assigned Print Format is selected by default in the Print dialog box.

Note: The **Default Print Format** User Option also applies to documents printed from the Web Client.

Terminal Emulation / Exit

Check Box	Action On Startup
Bypass Configuration	The OnBase Client module opens the terminal emulation window automatically, without displaying any configuration information.
Verify Window Exit	Prompts you for confirmation upon exit of the terminal emulation window.
Verify Exit	Prompts you for confirmation upon exit of the Client module. **Note:** This option does not apply to re-launching the Client module.

Document List Refresh

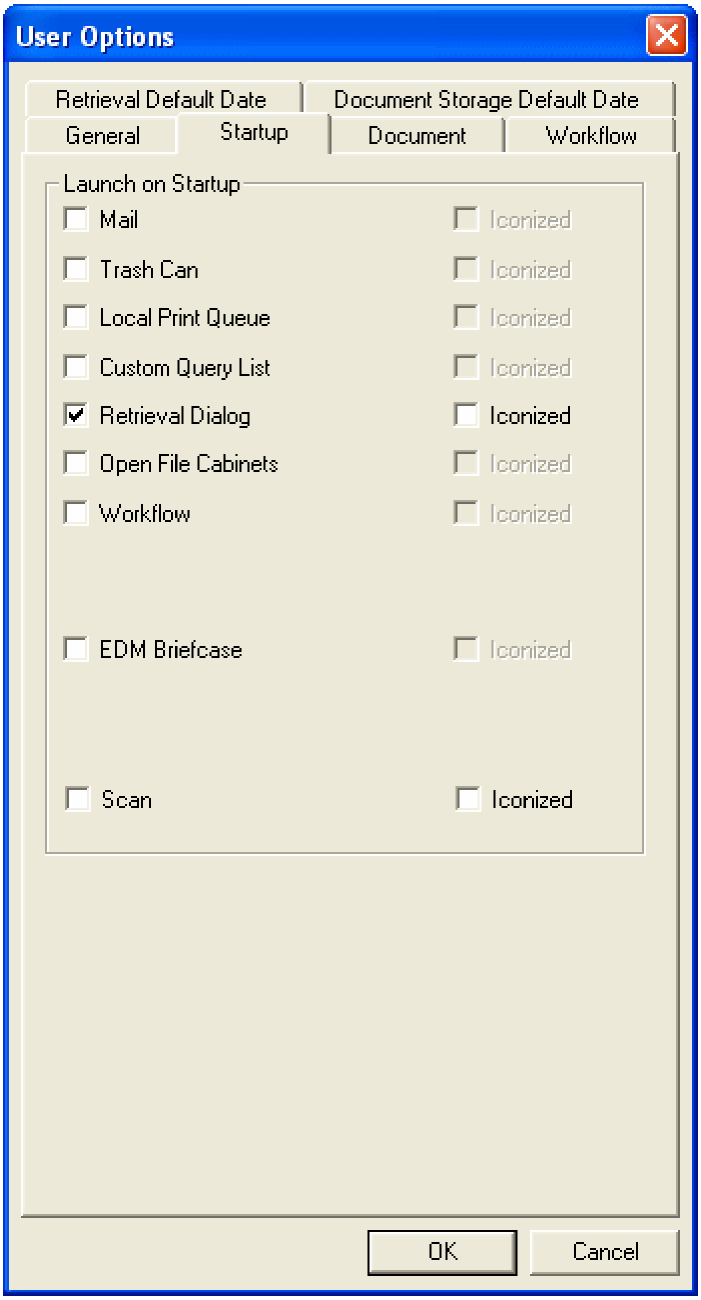
The **Document List Refresh** field determines how often the system refreshes the document information displayed in open search/result windows. The **Disable document list refresh** check box enables or disables the refresh function. Enter a value between 100 and 300 in the **Document List Refresh Rate <> Seconds** field to specify the document list refresh rate, in seconds.

Note: Only Custom Queries that are active can be refreshed.

Modifying User Options: The Startup Tab

Startup options determine which features display when you log on to the Client module, regardless of the workstation you use.

To configure **Startup** options, select **User | User Options** and select the **Startup** tab.



The **Launch on Startup** section determines which OnBase Client module features automatically display when you log on to OnBase. Select each feature to activate on startup.

Select **Iconized** to display the feature as a minimized icon at the bottom of the main screen.

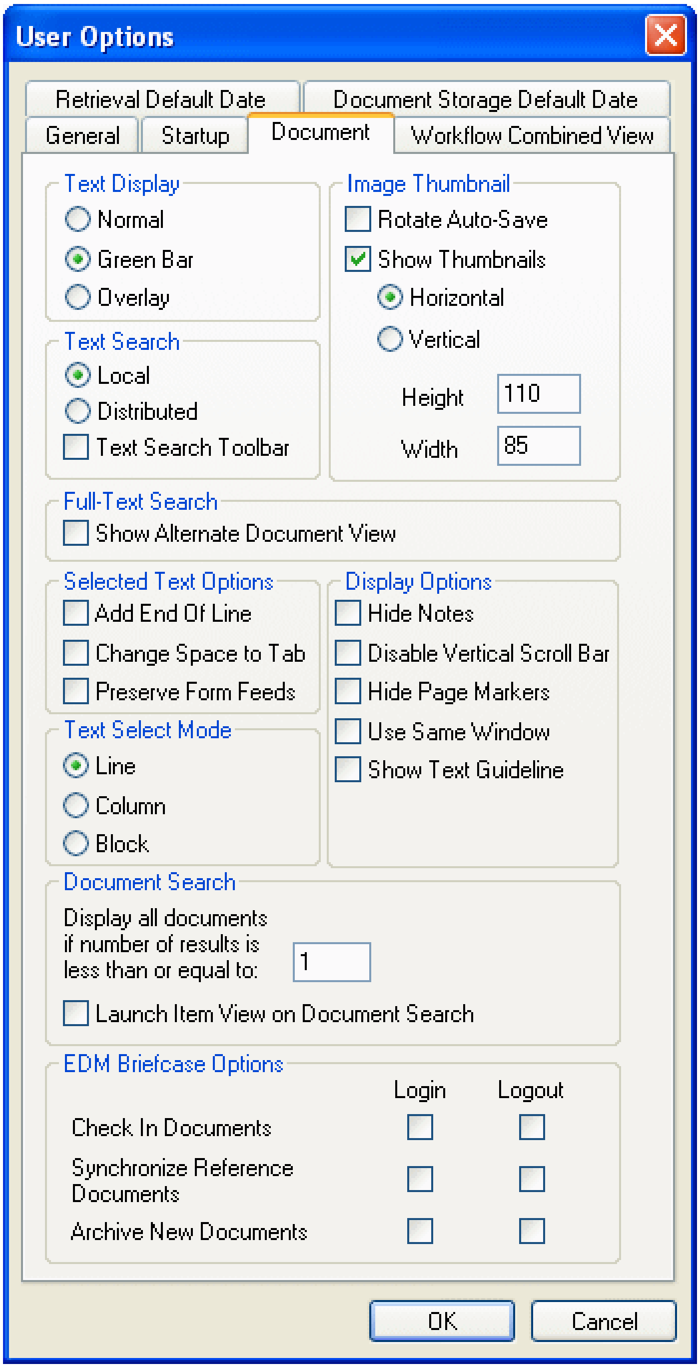
Option	Action On Startup
Mail	Opens your Mailbox.

Option	Action On Startup
Trash Can	Displays the Trash Can
Local Print Queue	Displays the status window for the local print queue. Selecting this option allows you to print documents by dragging them to the **Local Print Queue** window.
Custom Query List	Displays the **Custom Query** list, allowing you to simply select the desired query and run it.
Retrieval Dialog	Displays the **Document Retrieval** dialog box.
Open File Cabinets	Opens the File Cabinets to which you have access.
Workflow	Opens the **Workflow Inbox**.
Reading Group Viewer	Opens the **Reading Group Viewer**. **Note:** Depending on your system configuration, this option may not be available. Please see your system administrator for more information.
Disable if no documents are present	**Note:** This check box only becomes enabled if the **Reading Group Viewer** check box is selected. Causes the Reading Group Viewer to open only if the current user has unacknowledged documents in his/her queue(s).
EDM Briefcase	Opens the **EDM Briefcase**. **Note:** You must have sufficient privileges to check in or check out documents. Please see your system administrator for more information.
Scan	Displays the **Document Imaging** window. **Note:** Depending on your system configuration, this option may not be available. Please see your system administrator for more information.

Modifying User Options: The Document Tab

The User Options **Document** tab provides settings for documents retrieved in the OnBase Client module. **User Option** settings are assigned per user and remain in effect at any workstation.

To access the **Document** options, select **User | User Options**. Click on the **Document** tab. Alternately, right-click on the OnBase desktop and select **User Options.** Select the **Document** tab.


User Options
Retrieval Default Date
Document Storage Default Date
General
Startup
Document
Workflow Combined View
Text Display
Normal
Green Bar
Overlay
Image Thumbnail
Rotate Auto-Save
Show Thumbnails
Horizontal
Vertical
Text Search
Local
Distributed
Text Search Toolbar
Height
110
Width
85
Full-Text Search
Show Alternate Document View
Selected Text Options
Add End Of Line
Change Space to Tab
Preserve Form Feeds
Display Options
Hide Notes
Disable Vertical Scroll Bar
Hide Page Markers
Use Same Window
Show Text Guideline
Text Select Mode
Line
Column
Block
Document Search
Display all documents
if number of results is
less than or equal to:
1
Launch Item View on Document Search
EDM Briefcase Options
Login
Logout
Check In Documents
Synchronize Reference
Documents
Archive New Documents
OK
Cancel

Text Display

Display options for text documents are controlled by the options in the **Text Display** section.

Options	Description
Normal	Displays a document without added display options.
Green Bar	Displays text documents with a green bar background, making the documents easier to read. In order for this option to work, your system administrator must enable it per Document Type.
Overlays	Causes documents with overlays (pictures that display over a document) to be displayed by default with the overlay visible. The overlay image can be toggled with the toolbar **View Overlay** button.

Text Search

Search options for text documents are controlled by the options in the **Text Search** section.

Options	Description
Local	OnBase searches only the current computer during external text searches.
Distributed	The **Distributed** option allows the OnBase Client module to search a server during external text searches. The system administrator defines the server.
Text Search Toolbar	Enables the Text Search ToolBox toolbar.

Image Thumbnail

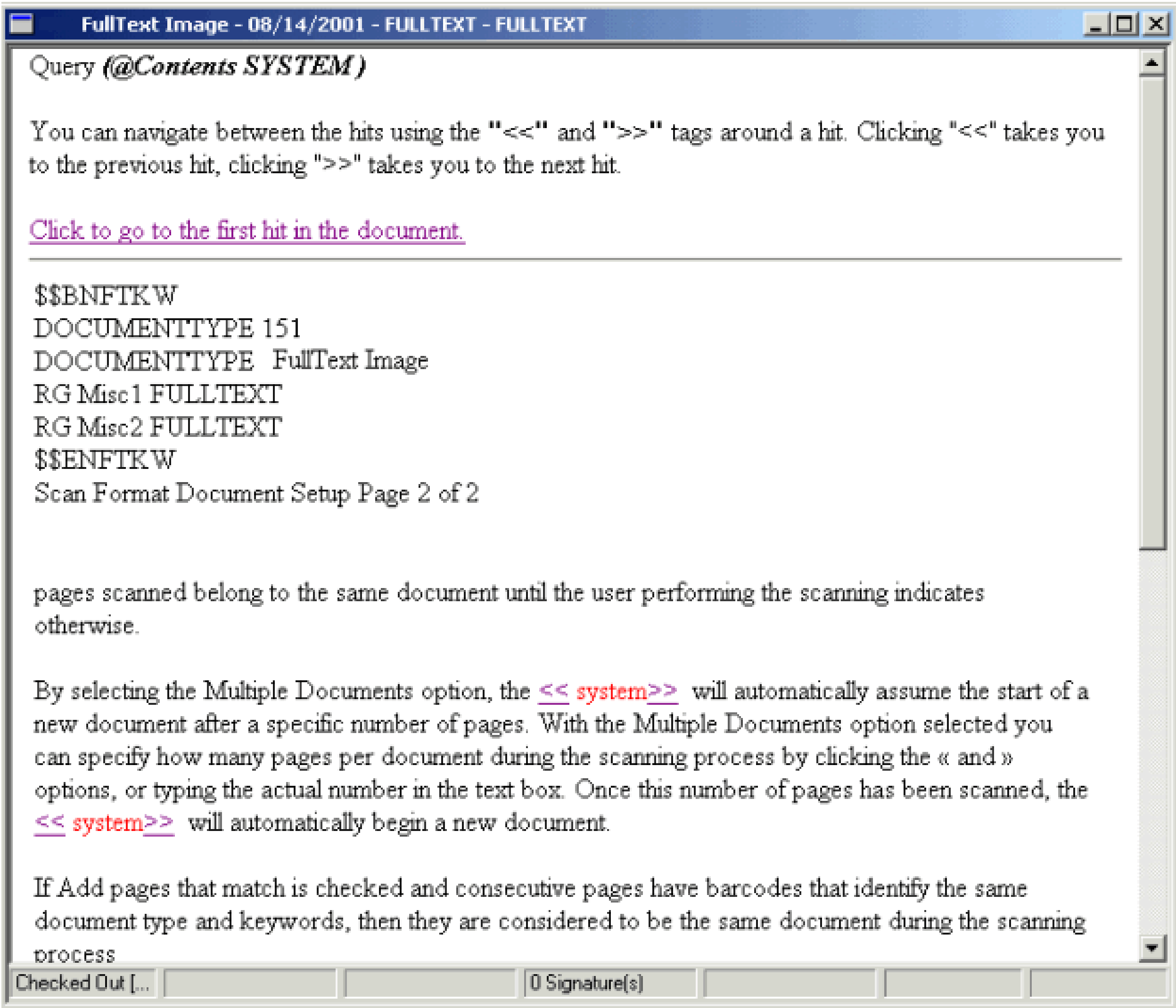
Thumbnails are miniature representations of each page of an image document. Thumbnails allow you to more easily navigate and arrange the pages of a multi-page documents. For example, you can click on a thumbnail to move from page to page, or right-click and drag to reposition a page within a document. The following settings determine the look of the thumbnails within the document viewer window.

Options	Description
Rotate Auto-Save	This option works in conjunction with the Rotate right-click options. When you select Rotate Auto-Save, any rotation you apply to a page is automatically saved, even if you do not select the **Rotate | Save** right-click option.
Show Thumbnails	When selected, thumbnails are displayed when viewing image documents.
Horizontal	Positions thumbnails horizontally, below the image.
Vertical	Positions thumbnails vertically, to the right of the image.
Height	Determines thumbnail height, measured in pixels.
Width	Determines the thumbnail width, measured in pixels.

Full-Text Search

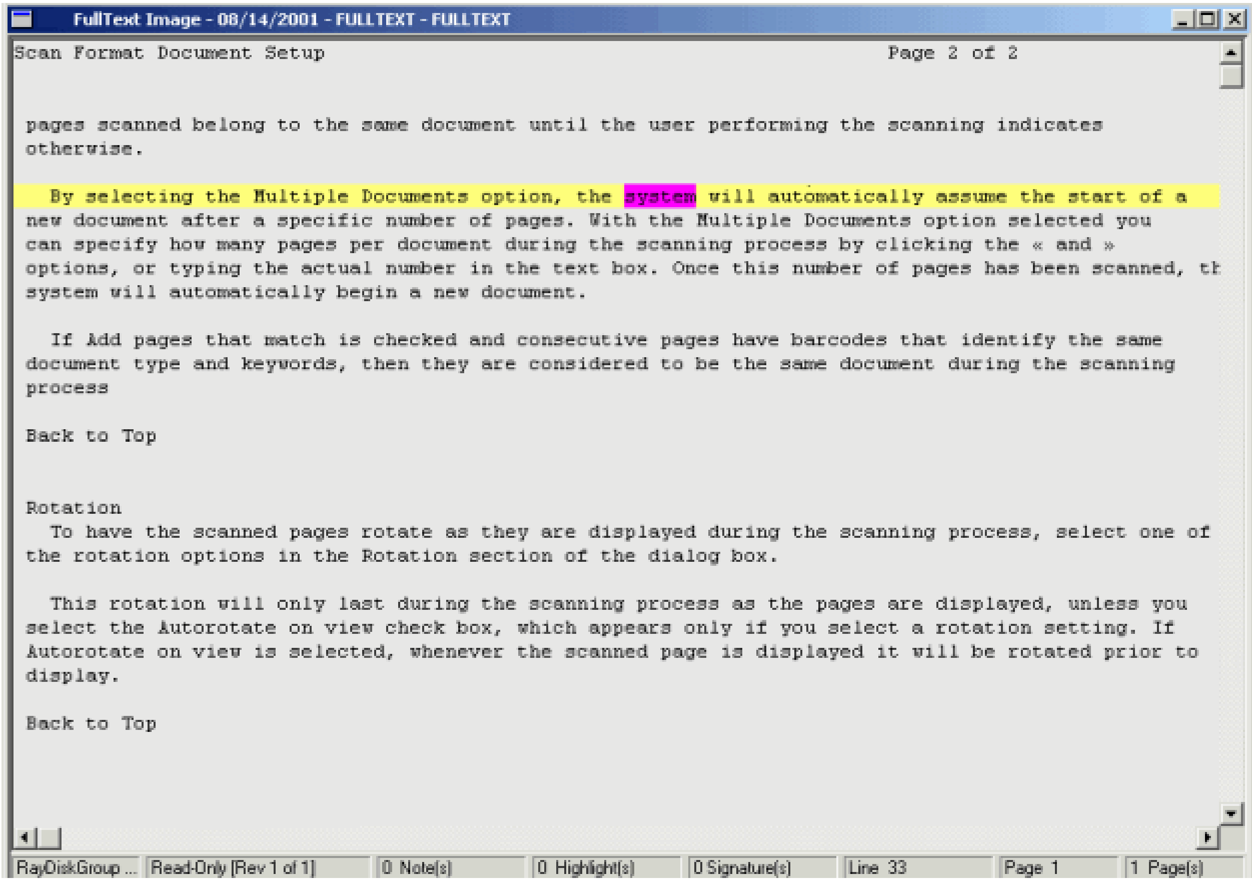
By default, when full-text searches are performed, the occurrences of text (or hits) are shown enclosed in << >>. Clicking on << guides you to the previous hit in the document. Clicking on >> guides you to the next hit.

Example:



When **Show Alternate Document View** is selected, text found during a full text search is highlighted in the document. When using this view, you must scroll through the document to view highlighted text. It is not possible to jump to each occurrence of text.

Example:



Selected Text Options

The **Selected Text Options** set the defaults for copying text from documents to the clipboard.

Options	Description
Add End of Line	Copies text up to and including the end of the line, which consists of a carriage return and a line feed.
Change Space to Tab	Converts each block of five spaces into a TAB character. For example, you could use this option to copy a spreadsheet document that uses spaces to separate columns, to a spreadsheet program that recognizes tab characters as column separators.
Preserve Form Feeds	Retains the selection's original form feed information.

Display Options

The **Display Options** set the default behavior for documents displayed in OnBase.

Options	Description
Hide Notes	Hides notes on a document. The number of notes on a document are displayed at the bottom of the document.
Disable Vertical Scroll Bar	Disables the vertical scroll bar located on the right hand side of a text document. You can move vertically through a document by using the keyboard arrow keys, the mouse scroll wheel, and the **Page Up** and **Page Down** keys.
Hide Page Markers	Hides page separators (lines that mark the end of a page) on text documents. The length of pages varies, depending on Document Type.
Use Same Window	Opens all text documents in a single window and all image documents in a separate, single window. This allows you to view only the most recently opened text and image document. You need to relaunch the OnBase Client module in order for changes to this setting to take affect. This setting only applies to text and image documents. It does not apply to HTML-based forms or third-party OLE documents.
Show Text Guideline	Creates a red guideline when viewing text documents. To activate the guideline, click on the area of the text document you are reading. This option will not function when the **Column Select Method** is set.

Selected Text Options

The **Selected Text Options** set the default behavior for selecting text in OnBase. You can override the default select behavior by right-clicking and selecting **Select Method**.

Options	Description
Line	Select this option to select one or more horizontal lines of text by default. **Note:** Depending on your system's configuration, your selection may be truncated. See your system administrator if you have questions about this behavior.

Options	Description
Column	Select this option to select one or more columns (vertical lines) of text by default.
Block	Select this option to select the area of text between the first and last mouse clicks by default. **Note:** Depending on your system's configuration, the number of characters you can select horizontally may be limited. See your system administrator if you have questions about this behavior.

Document Search

Display all documents if number of results is less than or equal to: This option designates whether documents are opened and displayed automatically when found, or displayed in a document search results list, based on the number of documents returned during a search.

For example, assume that **2** is selected for this option. If the number of documents found is less than or equal to two, the documents are opened automatically when found. If more than two documents are returned, a **Document Search Results** dialog box appears, allowing you to choose which documents to open.

Acceptable entries for this field are in the form of a positive number. For example, **400** is an acceptable entry, but **four** is not.

Launch Item View on Document Search: This option, when enabled, displays the **Viewer Window** in addition to the Document Search Results list each time a document search is performed. The **Viewer Window** allows users to preview a document before opening it.

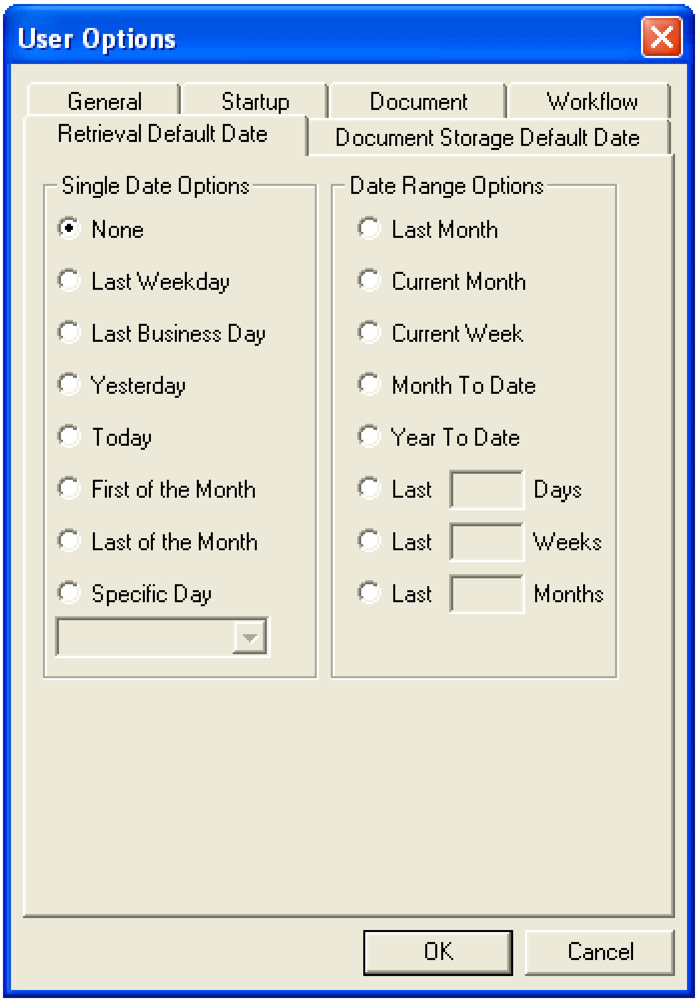
EDM Briefcase Options

The Checkout Options feature works in conjunction with the EDM Services persistent checkout feature. You must be licensed for the EDM Services module to use these options. See the EDM Services help files or your system administrator for more information.

Note: If a **User Options** setting conflicts with those set by your system administrator, the system administrator's settings take precedence.

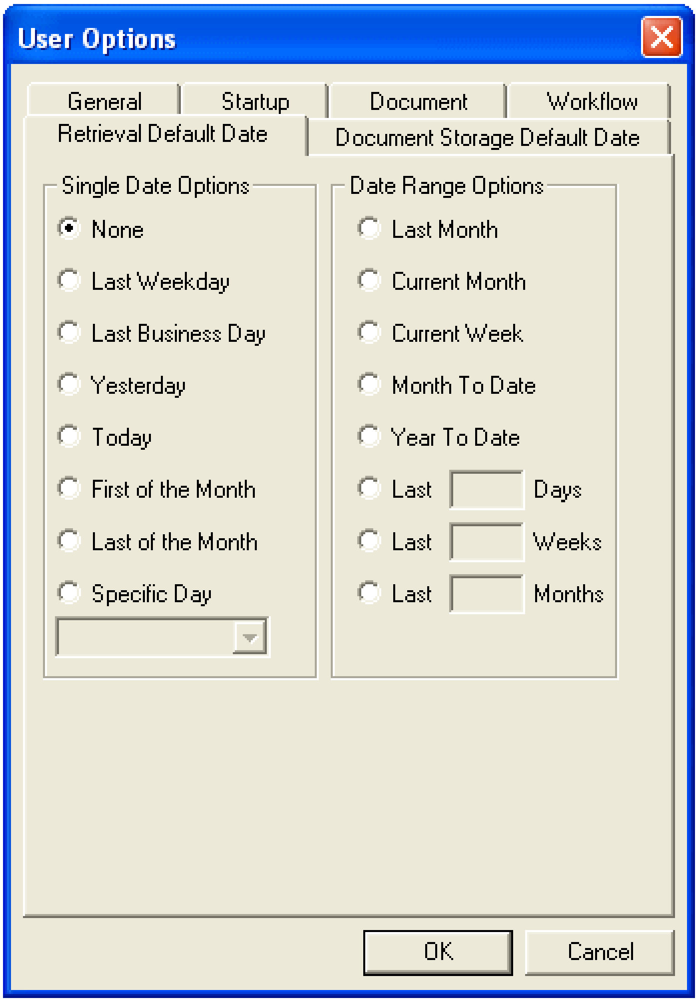
Modifying User Options: The Default Date Tab

The OnBase Client module provides options for setting two different **Default Dates** in the **User Options** dialog box. Select the **User | User Options** menu to display the **User Options** dialog box in the Client module.



Retrieval Default Date

This tab allows you to set either a single date or a date range to be used by the system as default for retrieving documents using the **Document Retrieval** and **Custom Queries** dialog boxes. Setting the default date saves time when you frequently search for documents using a specific date or date range.



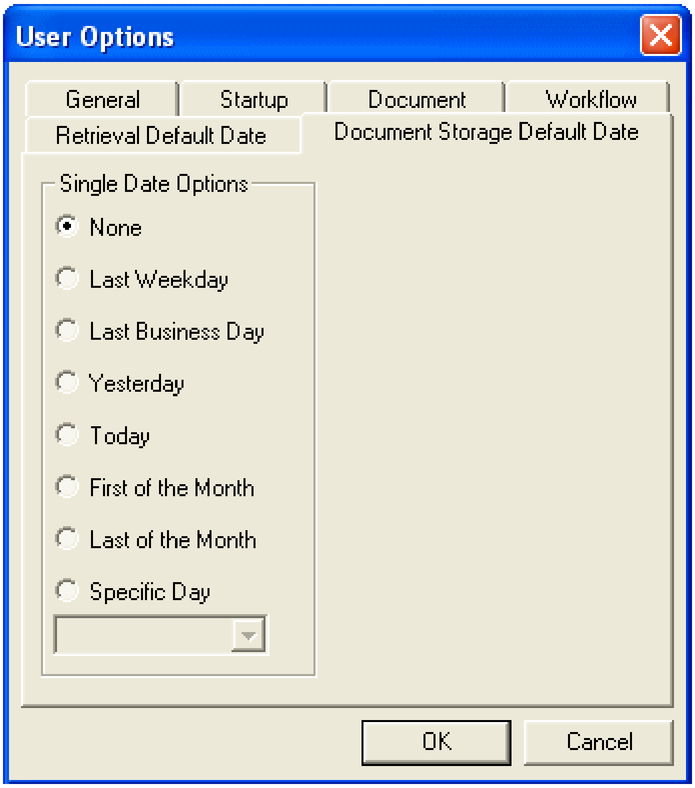
Single Date Options	Description
None	No default date is used.
Last Weekday	The previous weekday is used as a default. Friday is considered the last day of the week.
Last Business Day	The previous business day is used as a default. Saturday is considered the last business day of the week.
Yesterday	Yesterday’s date is used as the default date.
Today	Today’s date is used as the default date.
First of the Month	First day of the current month is used as the default date.
Last of the Month	Last day of the previous month is used as the default date.
Specific Day	A user-entered day is used as the default date.

Date Range Option	Description
Last Month	The date range of the prior month is used as the default date range.
Current Month	The date range of the current month is used as the default date range.
Current Week	The date range of the current week is used as the default date range.
Month to Date	The date range extends from the first day of the current month and the current date.
Year to Date	The date range extends from the first day of the year to the current date.
Last __ Days	The date range is determined by the number of days specified. Valid values are 1-3650.
Last ___ Weeks	The date range is determined by the number of weeks specified. Valid values are 1-522.
Last ___ Months	The date range is determined by the number of months specified. Valid values are 1-120.

Document Storage Default Date tab

This tab allows you to set the default **Document Date** of a document when it is imported using a system process, such as DIP, TIP, COLD, or Scan.

Note: This setting does not change the **Date Stored** value of the document. The Date Stored value is always set to the date the document was actually stored in OnBase.



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

Single Date Options	Description
Last of the Month	Last day of the previous month is used as the default date.
Specific Day	A user-entered day is used as the default date.

Modifying Your Workstation Options

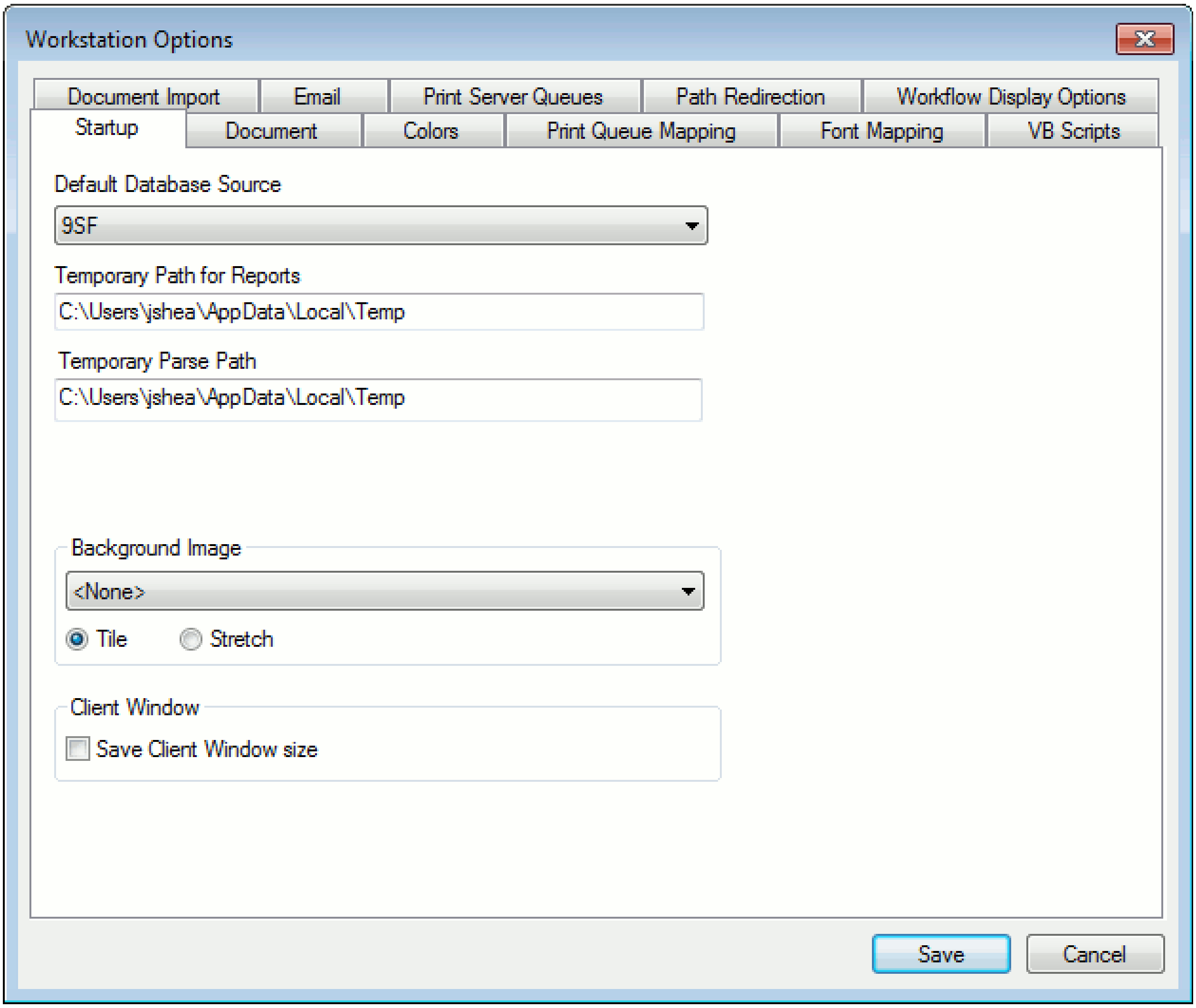
Workstation Options are dependent upon the computer which you are logged on to. Unlike User Options, Workstation Options are not tied to your user name and do not transfer when you use a different computer. Workstation options remain active for users logging on to the computer on which the options were enabled. The workstation options can be reset by anyone who logs on to the computer.

Accessing Workstation Options

To access Workstation Options by performing one of the following tasks:

- Click the **Workstation Options** toolbar button
- Select **User | Workstation Options**

Right-click on the OnBase Client module desktop and click **Workstation Options**. The **Workstation Options** dialog box displays.



Workstation Options Tabs

The workstation options are grouped into the following tabs on the **Workstation Options** dialog box:

Startup — See Modifying Workstation Options: The Startup Tab on page 351.

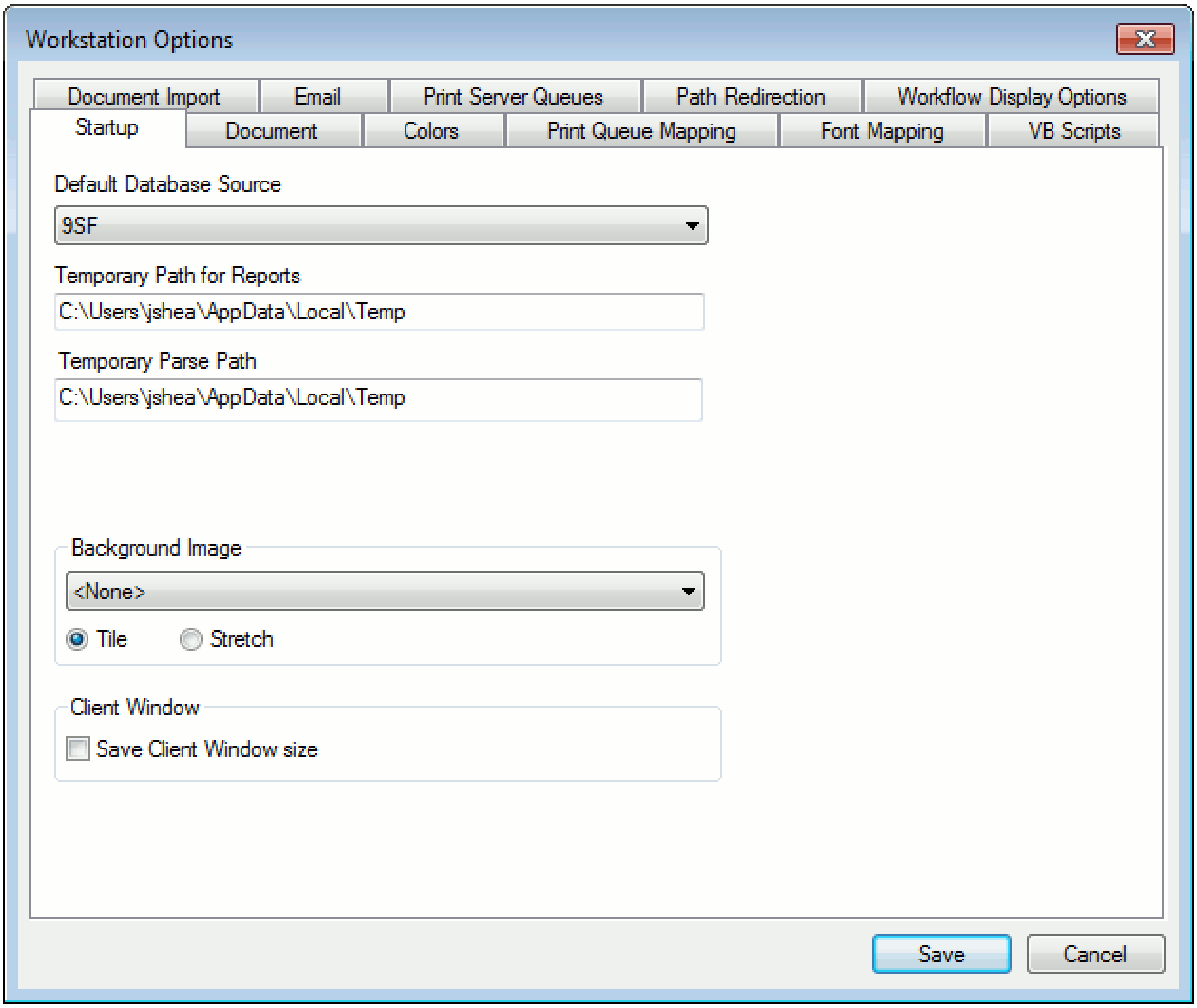
Colors — See Modifying Workstation Options: The Colors Tab on page 358.

Document — See Modifying Workstation Options: The Document Tab on page 352.

Note: For information regarding **VB Scripts**, **Font Mapping**, **Path Redirection**, **Print Queue Mapping,** and **Print Server Queues**, see your system administrator. For information regarding **E-Mail**, see the External Mail Services documentation.

Modifying Workstation Options: The Startup Tab

Workstation options are general settings that affect the workstation, regardless of which user is logged onto the system. In the OnBase Client module, select **User | Workstation Options** to display the Workstation Options dialog box. The default tab is **Startup**.



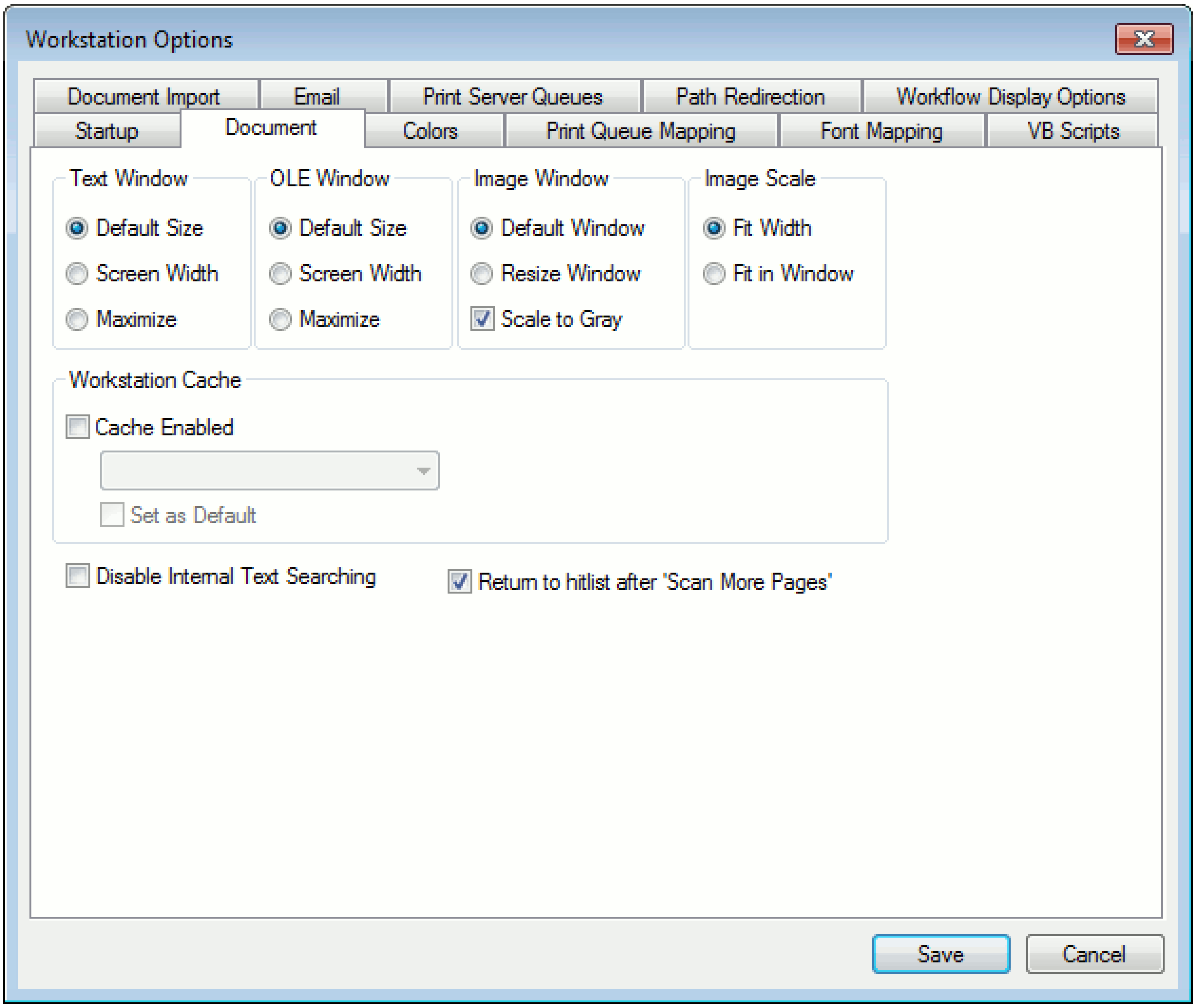
Startup Workstation Options	Detail
Default Database Source	The **Default Database Source** appears by default as the **Server Name** during logon.

Startup Workstation Options	Detail
Temporary Path for Reports	The **Temporary Path for Reports** is where the system places generated system reports before they are saved back into the system. If errors during report generation prevent the report from being saved, the temporary path may contain a partial report.
Temporary Parse Path	The **Temporary Parse Path** is the path where the system places files while they are being processed. **Note:** The **Temporary Parse Path** requires full control permissions to create and delete files.
Background Image	The **Background Image** is a document used as the Client module desktop background. Options include documents saved into the **SYS System Bitmaps** Document Type. If the image is too small to fill the entire Client window, click **Tile** to duplicate the image to fill the window. Select **Stretch** to expand the image to fill the window.
Client Window	The **Save Client Window Size** check box causes the system to retain the current window size for the next Client session. If not selected, the default window size is used on startup. **Note:** Depending on changes to workstation display settings, the Client window may open off-screen.

Modifying Workstation Options: The Document Tab

The **Document** settings define how documents are displayed by default. You can set separate defaults for text and image documents.

To access the **Document** options, right-click on the desktop, select **Workstation Options** and click on the **Document** tab. You can also select **User | Workstation Options**, and click on the **Document** tab.



Text Window

Text Window settings determine the default display size of a text document.

Option	Description
Default Size	The text window is sized to the standard Windows default size.
Screen Width	The document expands to the full width of the display area.
Maximize	Opens the document window to the maximum, possible size.

OLE Window

OLE Window settings determine the default display size of an OLE or XML document.

Option	Description
Default Size	The document window is sized to the standard Windows default size.
Screen Width	The document expands to the full width of the display area.
Maximize	Opens the document window to the maximum, possible size.

Image Window

Image Window settings determine the size of the image window, as well as whether image scale to gray by default.

Option	Description
Default Window	The image window is sized to the standard Windows default size.
Resize Window	The image window is sized to accommodate the width of the document. The window is then scaled to the height of the image (or to the entire screen if the height of the image is larger than that which can be accommodated within the image window).
Scale to Gray	The image will contain gray pixels in some areas, rather than using a mixture of black and white pixels to represent gray. This makes the image appear smoother.

Image Scale

The **Image Scale** section determines how the image document displays in the window.

Option	Description
Fit Width	The document displays so that the width of the document fills the default width of the image window. The height of the document is calculated to maintain the original image proportions.
Fit in Window	The document displays in its entirety at the maximum size that the default window size permits, while maintaining the image proportions.

Workstation Cache

Some system functions make use of a cache. A cache is a storage area where documents can be temporarily stored in order to decrease retrieval time. If a copy of the document exists in the cache, it is retrieved from the cache. If the document does not exist in the cache, the document is retrieved from the storage area defined by your system administrator.

Option	Description
Cache Enabled	Enable use of a cache. Select the appropriate cache from the drop-down menu. See your system administrator regarding which cache to use.
Set as Default	Select this option to use the settings as a default for future processing at this workstation. If this option is not selected, settings are used only for the current session.

Disable Internal Text Search

Disables the use of the **Text Searching** toolbar and **Text Search** toolbar button, to search through text documents in the OnBase Client module.

Return to Hit List After Scan More Pages

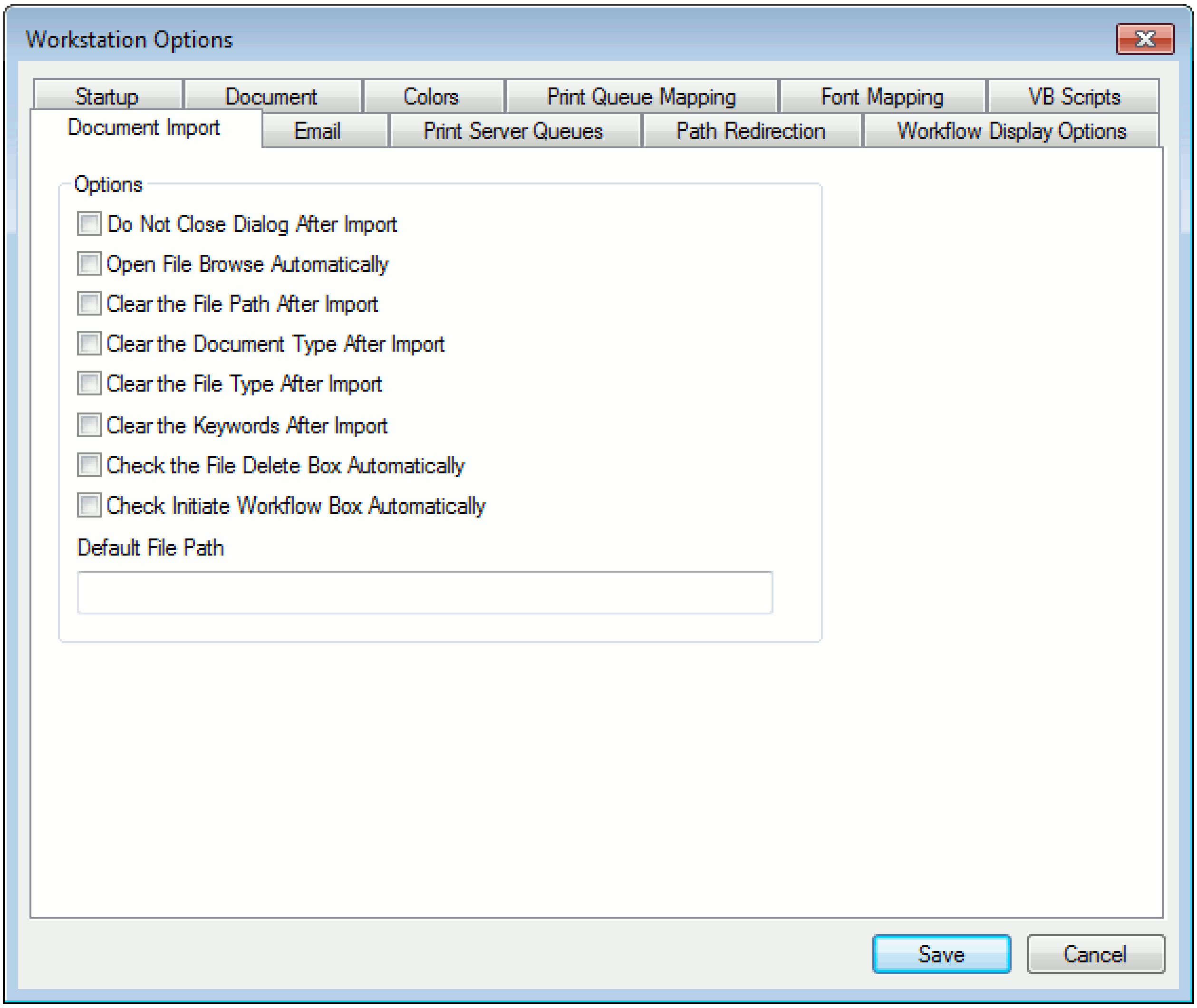
Select the **Return to hit list after 'Scan More Pages'** check box to control the focus after a user has scanned more pages to an existing document.

By default, the focus is set to the open document that has had more pages scanned to it. If the **Return to hit list after 'Scan More Pages'** check box is selected, the focus is changed to the Document Search Results window after a user has scanned more pages to an existing document.

Modifying Workstation Options: The-Document Import Tab

The **Document Import** tab in the Workstation Options affects the Import function.

1. In the OnBase Client module, select **User | Workstation Options**.
2. Click the **Document Import** tab.



The following table describes the **Document Import** Workstation Options.

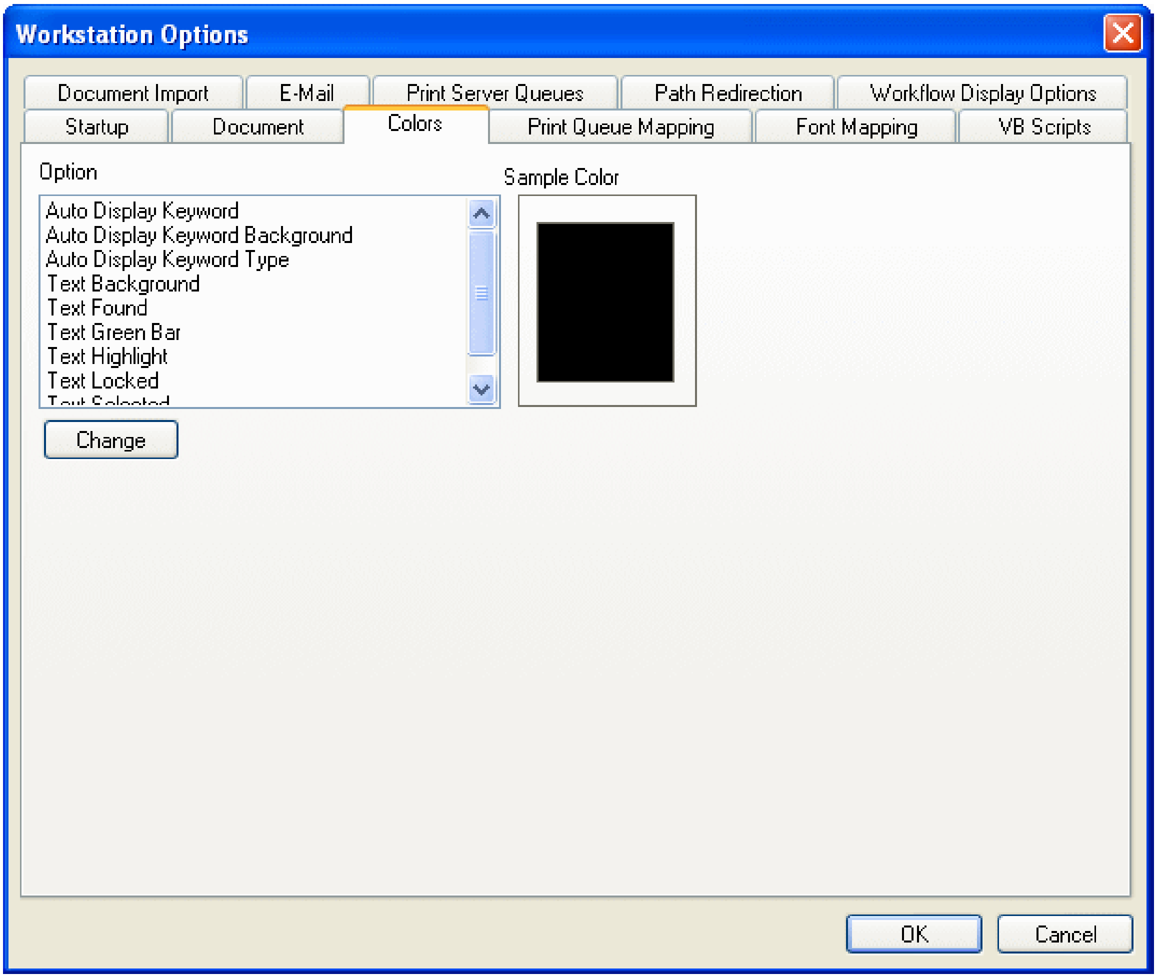
Option	Description
Do Not Close Dialog After Import	Keeps the **Import Document** dialog box open after a document import. **Note:** This option does not apply to import operations triggered by dragging and dropping a file into the OnBase Client.
Open File Browse Automatically	When the **Import Document** dialog box displays, the **Browse** option for the **Full Path to File** field opens automatically when importing a document. **Note:** This option does not apply to import operations triggered by dragging and dropping a file into the OnBase Client.
Clear the File Path After Import	Clears the **Full Path to File** field after a document import. **Note:** This setting is respected only if **Do Not Close Dialog After Import** is selected.
Clear the Document Type After Import	Clears the **Document Type** drop-down list after a document import. **Note:** This setting is respected only if **Do Not Close Dialog After Import** is selected.
Clear the File Type After Import	Clears the **File Type** drop-down list after a document import. **Note:** This setting is respected only if **Do Not Close Dialog After Import** is selected.
Clear the Keywords After Import	Clears the Keyword Type fields after a document import.
Check the File Delete Box Automatically	Selects the **Delete File After Import** check box in the **Import Document** dialog box by default. **Caution:** Before selecting this option, be sure documents that will be imported are not needed by other users or processes.
Check Initiate Workflow Box Automatically	Selects the **Initiate Workflow** check box by default. **Note:** Depending on your system's configuration, the **Initiate Workflow** check box may not be visible when importing documents. If the Initiate Workflow check box is not available on your workstation, the **Check Initiate Workflow Box Automatically** setting has no functionality within your OnBase system.

Option	Description
Default File Path	Enter the default path for imported documents. When the user clicks **Browse**, this location displays automatically.

Modifying Workstation Options: The Colors Tab

The **Colors** tab allows you to select the colors that are used throughout OnBase. Some colors are determined by the operating system setup.

To access **Color** options, right-click on the desktop and select **Workstation Options**. Select the **Colors** tab. You can also select **User | Workstation Options** and select the **Colors** tab.



Use the color options to change the text highlight color, text background color, green bar color, etc. The system options are also available for Auto-Display Keyword Values (Keyword Values that display automatically in a box for all open documents) and text documents. To change a color:

1. Select the item you want to change from the **Option** list. The **Sample Color** window shows the current color setting for the selected item.
2. Click **Change** to display the **Color** dialog box.
3. Select the desired color. To select a variation, click **Define Custom Colors**. The dialog box expands to display a color palette. Choose the desired color.
4. Click **OK**.

Modifying Workstation Options: The VB Scripts Tab

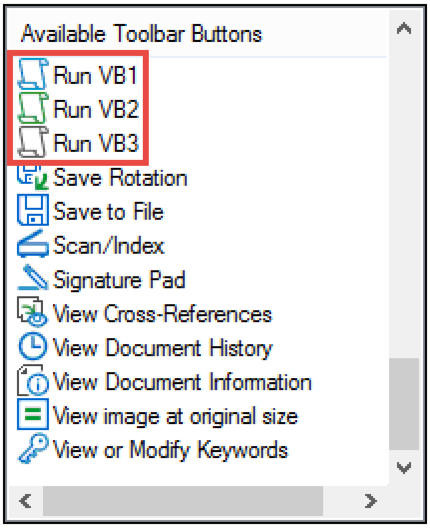
Up to three custom toolbar buttons in the OnBase Client can be configured to run VB Scripts. To configure a VB Script toolbar button:

1. Verify that there are VB Scripts available, or first create a VB Script in the Configuration module.
2. Select **User | Workstation Options** in the OnBase Client, or right-click on the Client desktop and select **Workstation Options**.
3. Click the **VB Scripts** tab. There are three buttons available for VB Script association: **VB1, VB2**, and **VB3**.
4. Select a script from the **VB1**, **VB2**, or **VB3** drop-down list to associate a script with that toolbar button.
5. Click **OK** to save and exit.

Creating a VB Script Toolbar Button

If your VB Scripts buttons are not already available on the toolbar:

1. Select **User | Toolbars | Customize Toolbar**.
2. Select the appropriate VB Scripts toolbar button from the **Available Toolbar Buttons** list and click **Add** to move it to the **Current Toolbar Layout** list. The buttons are named according to the script with which they are associated, but appear in the alphabetical list in the order of their default names (Run VB1, Run VB2, and Run VB3).



3. Click **Save**. The VB Scripts toolbar buttons are now available.

Note: In order for the VB Scripts toolbar buttons to be enabled, you must have VB Scripts associated with them and have a document open or documents selected from the retrieval list. For more information, see Modifying Workstation Options: The VB Scripts Tab on page 359.

Using a VB Script Toolbar Button

Once you have configured a toolbar button to run a VB Script, the button can be clicked to run the script over any open document or a group of documents selected from the document retrieval list.

Note: When running a VB Script from a combined viewer/retrieval list (such as in Workflow, Folders, and File Cabinets), the script is only run on the document displayed. The script cannot be run on a group of documents selected in a combined viewer/retrieval list.

Using External Functionality

Adding Menu Items to the OnBase Client

Tools allow you to run other programs, such as Microsoft Word, WordPad, and PowerPoint, in the OnBase Client module. When you run programs from the Client module, you can send a document to another program. You can also send the current logon parameters and the ODBC source to the other program.

Caution: Linking to external executable files poses a security risk in the event that the executables are replaced or corrupted by malicious software. The linked external executables are launched by OnBase and inherit all the privileges of the active Windows user.

Adding a New Tool

To configure a new tool in the Client module:

1. Select **User | Add / Modify Tool Item**. The **Add Tools** dialog box displays.
2. Enter the name of the tool (usually a program) in the text field below the **Current Tools** box. This name will appear in the **User** menu below the **Add / Modify Tool Item** menu option. Users choose the tool name to open the corresponding program.

Note: A maximum of 15 tools can be added.

3. To designate a character in the **Tool** name function as a hot key, precede it with an ampersand (&). For example, a tool named Excel uses x as a hot key. Depending on your windows settings, the hot key may or may not be underlined.
4. In the **Command Line** field, enter the full path to the program to be launched. If a partial path is entered the message **Unable to execute name of file. Path not found** appears when you attempt to call the tool.
5. The **Command Line Parameters** field allows you to add parameters to the command line. **%D** allows you to open a document in the Client module and click on the tool from the **User** menu. **%L** specifies a common user name and password between the Client module and another program that requires a logon definition.
6. Enter the directory of the program in the **Working Directory** field. If the location of the program is the same for the working directory as it is in the **Command Line** field, you do not have to type in the location for this field.
7. Click **Save**.

The **Current Tools** box lists all tools configured for this workstation. To modify an existing tool, select it from the list and modify the tool fields.

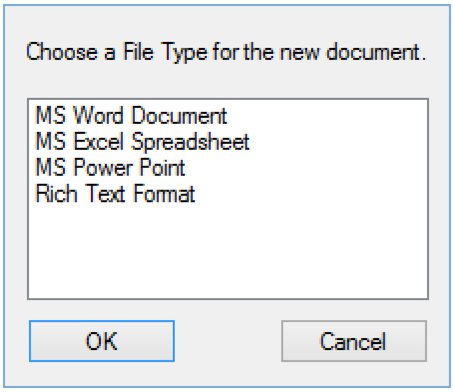
Using A Named Font

A **Named Font** allows you to choose an installed Windows font with a custom name chosen by your system administrator. You can use the font to display and print within the system. When using overlays, a Named Font can ensure that everyone using the document management system is using the same font with the overlay for the assigned document type.

Creating A New Third-Party Document

To create new documents using third-party software such as Microsoft Word, Microsoft Excel, or Microsoft PowerPoint:

8. Select **File | New | Document**.
9. Select the desired file type and click **OK**.



Note: Clicking **OK** additional times will create additional documents.

Menu Options

The Client's default menu options are listed in this section. There may be other options available in the menus depending on the configuration and licensing of the workstation.

The menus are presented in a left to right, top to bottom format when viewing the menus in the OnBase Client module. For more information concerning each of these menu options, see the references below or the Index.

File Menu

New | Document - See Creating A New Third-Party Document on page 362.

Open | Retrieve Documents - See Retrieving a Document on page 33.

Open | File Cabinets - See Classic File Cabinets Window on page 225.

Open | Custom Query - See My Custom Queries on page 90.

Open | Retrieve by Document Handle - See Retrieve by Document Handle on page 47.

Import - See Importing Documents - Advanced Options on page 96.

Close - closes the selected document.

Close All - closes all open documents.

Save As - See Save As Document on page 279.

Re-Index - See Re-Indexing Documents on page 98.

Print - See Printing Documents on page 144.

Auto Print - See Automatically Print Using Default Settings on page 152.

Send to | Mail | Mail Recipient - See Sending External Mail on page 290.

Send to | Mail | Internal User - See Sending Internal Mail on page 320.

Send to | Mail | Mail Recipient (with Advanced Options) - See Sending External Mail on page 290.

Send to | Create New Document - See Creating a Document on page 117.

Lock Workstation - See Locking Your Workstation on page 385.

Switch User - See Switching to Another User on page 385.

Re-launch Client - See Re-Launching the OnBase Client on page 385.

Exit - closes the Client module.

Document Menu

Revisions / Renditions - See Viewing Renditions on page 159.

Keywords - See Accessing an Existing Document's Keyword Values on page 312.

Overlay - See Overlays on page 160.

Text Window - See Removing an Overlay from a Document on page 161.

Thumbnails - See Using Thumbnails on page 273.

Add Note - See Adding Notes on page 126.

Previous Page - See Previous Page on page 270.

Next Page - See Next Page on page 270.

View Notes - See Viewing or Modifying Notes on page 128.

View Previous Document - See View Previous Document on page 271.

View Next Document - See View Next Document on page 271.

Properties - See Document Properties on page 67.

User Menu

Text Search Results - See Viewing Text Search Results on page 303.

Print Queue - See Navigating the Print Queues Window on page 154.

Trash Can - See Accessing the Trash Can on page 181.

Mailbox - See Viewing Internal Mail on page 324.

Locked Objects - See Clearing Locked Objects on page 386.

Envelopes - See Using Envelopes on page 198.

User Options - See Modifying Your User Options on page 329.

Workstation Options - See Modifying Your Workstation Options on page 349.

Change Password - See Changing Your Password on page 329.

Toolbars - See Customizing the Client Toolbar on page 374.

Add / Modify Tool Item - See Adding Menu Items to the OnBase Client on page 361.

Window Menu

The **Window** drop-down menu at the top of the screen provides the following options for the arrangement of open windows on the system desktop:

Option	Action
Cascade	Cascades open windows. Windows stack from the upper left to the lower right of the system desktop.
Tile Horizontally	Arranges open windows horizontally in rows.

Option	Action
Tile Vertically	Arranges open windows vertically in columns.
Tasks Bar	Toggles the Workflow **Tasks** bar on and off. You may or may not have access to this option. Available tasks are determined by your system administrator.
System Status	Displays the **System Status** window, which is iconized, by default, in the lower left corner of the system desktop.
Shortcut Menu	Displays options for open image documents, text-based documents, or cross-reference results lists. This shortcut menu is also available by right-clicking on an open document.
Reset All Saved Window Positions	Restores window positions to their default locations.

The bottom portion of the **Window** drop-down menu lists all currently open windows. For more information, see your system administrator.

Toolbars

You can use the main toolbar in the OnBase Client module to easily access functions.

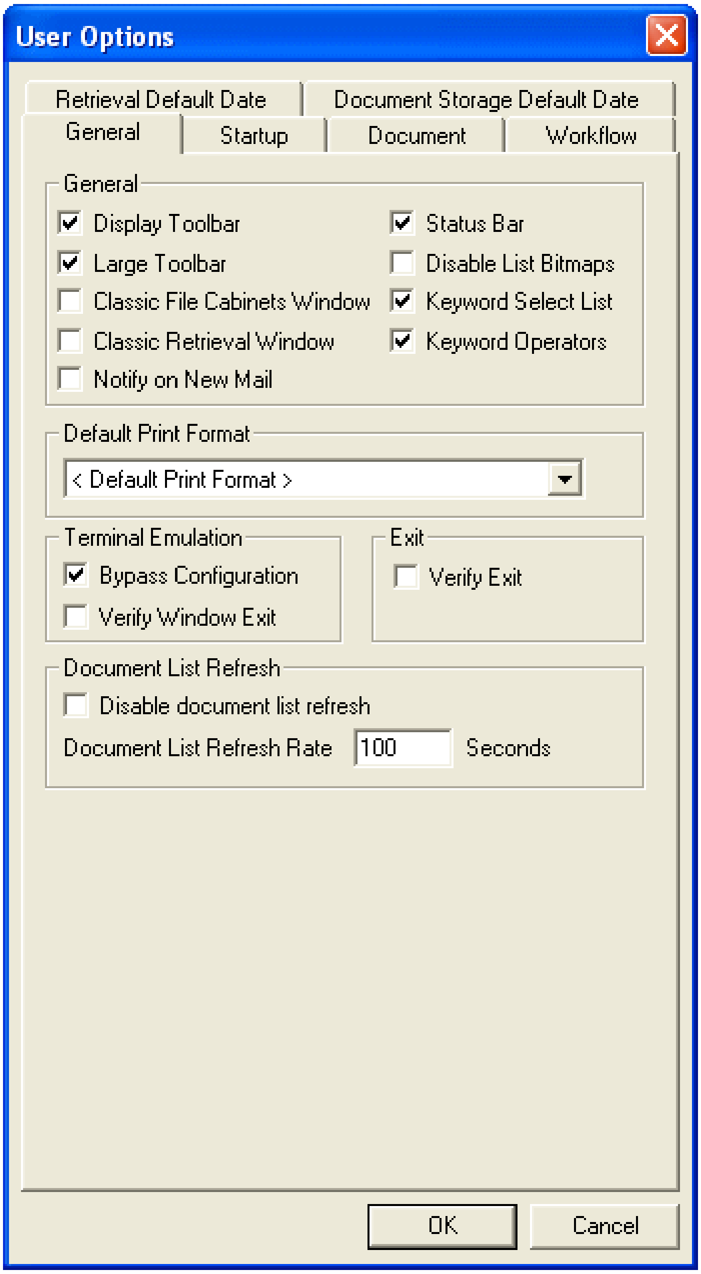
Client Toolbar

The default Client module toolbar is viewable at startup by enabling it on the **General** tab of the **User Options** dialog box, available under **User | User Options**. Buttons and other functionality can be added to the Client toolbar by selecting **User | Toolbars | Customize Toolbar**. The following sections outline the use and features of the toolbar.

Default Client Toolbar

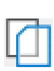
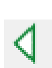
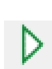
To enable the client toolbar to appear on Startup of the Client Module:

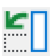
1. In the Client module, select **User | User Options**, and select the **General** tab.



2. Select **Display Toolbar**. To display large toolbar buttons, select **Large Toolbar**.

The following table describes each toolbar button.

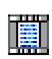
Toolbar Button	Description
	**Retrieve Documents** Opens the **Document Retrieval** dialog box.
	**Open File Cabinets** Opens the **File Cabinets** dialog box, which provides access to folders and their related documents.
	**Host Session** Opens a Host session.
	**Import Documents** Opens the **Import Document** dialog box, which allows you to import single documents into the system.
	**Print** Opens the **Print** dialog box.
	**Send Mail** Opens the **Send Mail** dialog box, which allows you to send internal system mail to other users.
	**Workflow Inbox** Opens the **Workflow Inbox** window.
	**Attach Note** Opens the **Add Note** dialog box.
	**Text Search** Works differently depending on the format of the document that is open. This button works for text-based documents. From a document that only has text, click to perform an internal text search without having to re-enter the text search criteria. Internal Text Search Options must already be set up in order to use this button to perform an internal text search. Some documents are text-based documents that have been formatted attractively. For these documents, click to open the **Internal Text Search** dialog box from which you can perform an internal text search.
	**View Overlay** Displays the document overlay, if one is configured for the document being viewed.
	**Previous Page** Display the previous page of a multi-page document.
	**Next Page** Displays the next page of a multi-page document.

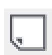
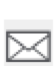
Toolbar Button	Description
	**Zoom In** Magnifies the view of a document. This feature does not function on text documents.
	Zoom Out Displays the document at a decreased size, which displays a greater area of the document. This feature does not function on text documents.
	**Fit Width** Resizes the window to fit the width of the document. This feature does not function on text documents.
	**Fit Window** Resizes the document to fit the width of the window. This feature does not function on text documents.
	**Rotate Left** Rotates the document 90 degrees to the left. This feature does not function on text documents. Image documents with overlays have special rotate functionality. **Note:** If a document has an overlay assigned, all rotate, flip and invert options are available to the document itself, but not the overlay.
	**Rotate Right** Rotates the document 90 degrees to the right. This feature does not function on text documents that do not have an overlay.
	**Toggle Thumbnails** Turns the thumbnail view on and off. This feature does not function on text documents that do not have an overlay.
	**Tile Vertically** Arranges all open windows vertically in columns.
	**Tile Horizontally** Arranges all open windows horizontally in rows.
	**Close All** Click to close all open document windows.

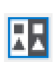
Note: To return a document to its default appearance, right-click on the open document or the status bar of the open document and select **Reset**.

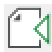
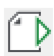
Additional Custom Toolbar Buttons

You can add these additional custom toolbar buttons to your toolbar (**User | Toolbar | Customize Toolbar**).

Toolbar Button	Description
	**Refresh the Current Window** Updates the screen.
	**View Document Information** Displays the **Document Information for Document Handle** dialog box.
	**View or Modify Keywords** Displays the **Add / Modify Keywords** dialog box.
	**Re-Index** Opens the **Re-Index Document** dialog box.
	**Scan/Index** Opens the Document Imaging scan queues.
	**Open COLD Queue** Opens the COLD Queue.
	**Open DIP Queue** Opens the DIP Queue.
	**Open Document Template** Opens the **Document Templates** dialog box.
	**Save to File** Opens the **Save Selection Options** dialog box (options for saving the document outside of OnBase).
	**Delete Selected Items** Click to delete items selected in a Document Results list, or a Cross-References list. This is available from a Document Retrieval list only. This button also allows you to delete an open document. Your system administrator must assign you deletion rights.
	**Flip Image Horizontal** Flips the document image horizontally. This feature is not available on text documents. Image documents with overlays have special flip functionality.

Toolbar Button	Description
	**Flip Vertical** Flips the document image vertically. This feature is not available on text documents.
	**Copy Page to Clipboard** Copies the open document's page to the clipboard. This option is available for text documents only.
	**Create From Existing Document** Opens the **Create new document from existing** dialog box.
	**Create New OLE Document** Opens the **Create New Document** dialog box.
	**Open Note** From an open document, opens the **Select Note** dialog box. The **Select Note** dialog box displays a list of all note(s) or highlight annotations attached to the document.
	**Cascade Windows** Arranges all open windows, stacked from the upper left of the desktop to the lower right.
	**Change Font** Displays the **Font** dialog box. From here you can change the appearance of the text in text documents. This option is available for text documents only. 1. Choose from the list of fonts, which is composed of all fixed pitch fonts installed on your system 2. Click **OK**. Text documents will now display using the new font settings.
  	**Run VB1, Run VB2, Run VB3** Click to run the VB Script associated with VB1, VB2, or VB3. You must have VB Scripts associated with Run VB1, Run VB2, and Run VB3 before they will become enabled. To associate VB Scripts with Toolbar buttons in the OnBase Client module, navigate to (**User | Workstation Options | VB Scripts**).
	**Create Highlight** After selecting text from within a text document, displays the **Choose highlighter** dialog box. This provides the list of highlighters that are available for highlighting/ annotating your text.
	**Create New Envelope** Displays the **New Envelope** dialog box.

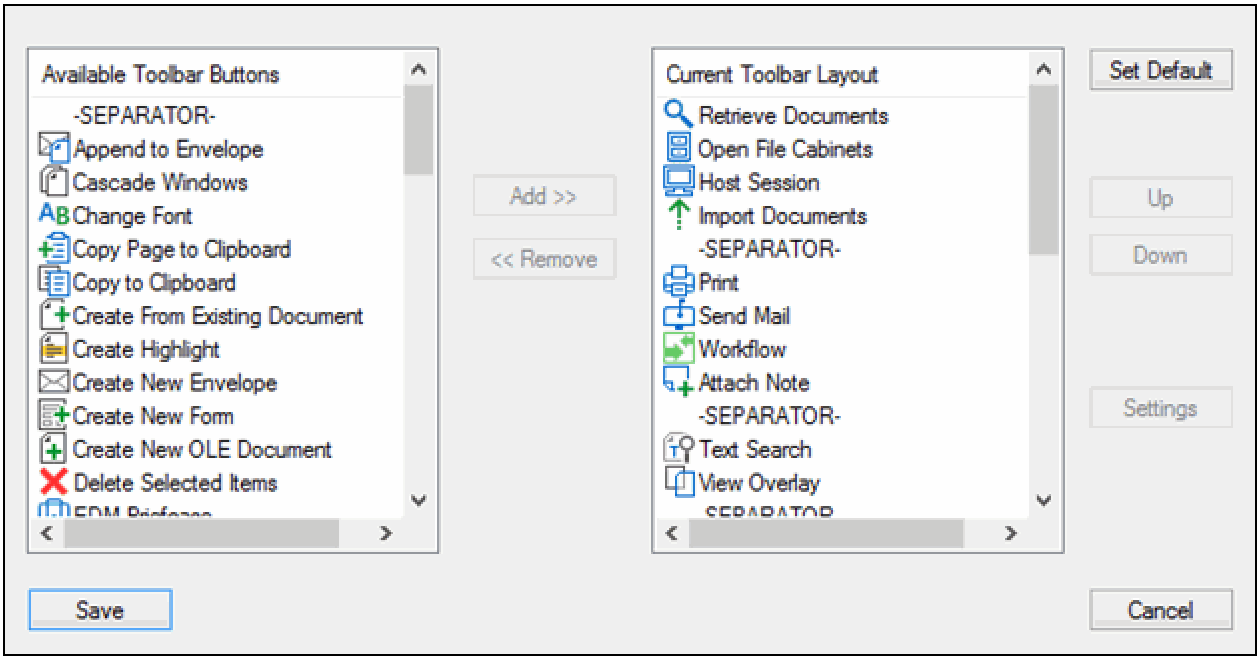
Toolbar Button	Description
	**Create New Form** Displays a list of available E-Forms or a specific E-Form. To select a specific E-Form to create when clicking **Create New Form**, add the button to your current toolbar layout and click **Settings**. Select the E-Form in the **New Form Document** dialog box and click **OK**. When **<NO FORM ASSIGNED>** is selected, a list of available E-Forms is displayed after clicking **Create New Form**. **Note:** Your selection in the **New Form Document** dialog box is not applied when you select **File | New | Forms**. Selecting **File | New | Forms** will still display a list of all available forms to create.
	**Create ROI Request** Displays the ROI Request Creation wizard, which lets you create a new ROI request to be processed. This button requires one of the Medical Records Release of Information licenses.
	**Open Workstation Options** Displays the **Workstation Options** dialog box.
	**Open User Options** Displays the **User Options** dialog box.
	**Rotate Image 180 Degrees** From an open image document, rotates the image 180 degrees. This feature does not function on text documents. Image documents with overlays have special rotate functionality.
	**Invert Image** From an open image document, inverts the images colors (i.e. black writing on a white background will become white writing on a black background). This feature does not function on text documents. Image documents with overlays have special invert functionality.
	**View Image at Original Size** From an open document, displays the image in its original size. This feature does not function on text documents.
	**Go to Line** From an open text document, displays the **Go to Line** dialog box. Type a number and click **OK** to scroll the document to that line (it will be the first line in the viewable area). This option is available for text documents only.

Toolbar Button	Description
	**Go to Page** From an open image or text document, displays the **Go To Page** dialog box. Type a number and click **OK** to scroll the document to that page. **Tip:** Use this option to navigate to suppressed pages of an image document. Suppressed pages are not displayed in the Document Viewer by default. For more information on suppressed pages, see your system administrator.
	**Previous Document** From an open image or text document, displays the previous document in the Document Retrieval list.
	**Next Document** From an open image or text document, displays the next document in the Document Retrieval list.
	**Mail Document (Internal)** From a document retrieval list or from within a document, displays the **Send Mail** dialog box (for internal mail). The document you have selected or have open will be sent as an attachment.
	**Mail Document (External)** From a document retrieval list or from within a document, displays the new message dialog box of your external mail program. The document you have selected or have open will be an attachment.
	**Open Envelope** Displays the **Open Envelope** dialog box, which contains all available envelopes.
	**Append to Envelope** Select a document from a document retrieval list and click button to display the **Append to Envelope** dialog box containing all available envelopes. Double-click an envelope to add the document to that envelope.
	**Mail Selected Text as Attachment** Attaches the selected text as an attachment to an internal or external mail message. This option is available for text documents only.
	**Open Print Queue** Displays the **Print Queue** dialog box.
	**Open Trash Can** Displays the **Trash Can** dialog box.

Toolbar Button	Description
	**Open Help Search** Opens the Help files at the **Search** tab.
	**Open Help Index** Opens the Help files at the **Index** tab.
	**Open Help** Opens the Help files.
	**View Document History** From an open document (or selected document in a document retrieval list), displays the **Document History** dialog box.
	**Open Custom Queries** Opens the **Custom Queries** dialog box.
	**Open About Box** Opens the **About Client** dialog box containing licensing agreements, copyrights and general information about the program.
	**Save Rotation** Saves the document in its rotated position. **Note:** If you save the rotation on a page of a DJDE, PCL, or AFP document, the rotation is applied to all pages of the document.
	**Signature Pad** Launches the **Signature Capture** dialog box.
	**View Cross-References** Displays all Document Types cross-referenced to the open document.
	**Run All Cross-References** Displays all documents cross-referenced to the open document.
	**Collaboration Workspaces** If your system is licensed for the Collaboration module, this button can be added to the toolbar. Selecting this button displays the **My Workspaces** window of the Collaboration module.

Customizing the Client Toolbar

The Client Toolbar is composed of buttons that launch actions. Depending on your system's configuration, you may be able to customize your Client Toolbar. To customize the Client Toolbar, select **User | Toolbars | Customize Toolbar**. The **Customize Toolbar Buttons** dialog box is displayed.



Adding a Button to the Toolbar

Do one of the following:

- Select a button in the **Available Toolbar Buttons** box and click **Add>>** to move the button to the **Current Toolbar Layout** box.
- Click on a button in the **Available Toolbar Buttons** box and drag it to the appropriate position in the **Current Toolbar Layout** box.
- Click on a button in the **Available Toolbar Buttons** box and drag it to the appropriate position on the Client Toolbar.
- Select a button in the **Available Toolbar Buttons** box and double-click to move the button to the **Current Toolbar Layout** box.

Removing a Button from the Toolbar

Do one of the following:

- Select a button in the **Current Toolbar Layout** box and click **Remove>>** to move the button to the **Available Toolbar Buttons** box.
- Click on a button in the **Current Toolbar Layout** box and drag it to the **Available Toolbar Buttons** box.
- Click on a button on the Client Toolbar and drag it to any position outside of the Client Toolbar. The **Customize Toolbar Buttons** dialog must be active to use this method.
- Select a button in the **Current Toolbar Layout** box and double-click to move the button to the **Available Toolbar Buttons** box.

Repositioning Toolbar Buttons

The order in which the buttons are displayed in the **Current Toolbar Layout** list determines button placement on the Client Toolbar. If the toolbar is positioned horizontally, the buttons are displayed from left to right. If the toolbar is positioned vertically, the buttons are displayed from top to bottom. Move buttons up or down in the **Toolbar Layout** list by clicking the **Up** and **Down** buttons.

Note: If the toolbar buttons exceed the space allowed in the Client window, the Client Toolbar must be undocked.

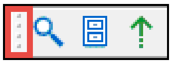
Toolbar Button Settings

If additional toolbar button settings can be configured, the **Settings** button is enabled after the toolbar button has been added to your current toolbar layout.

For more information on these available settings, see Additional Custom Toolbar Buttons on page 369.

Undocking the Client Toolbar

To undock the Client Toolbar, place the cursor over the vertical gripper on the left-hand side of the toolbar.



Click and drag the toolbar onto the Client desktop background. A new window with all desired toolbar buttons displays.

Grouping Toolbar Buttons

The **-SEPARATOR-** button places a space between buttons on the toolbar. Position **-SEPARATOR-** buttons in the desired positions between buttons in the **Current Toolbar Layout** box.

Default Toolbar Layout

To return to the default toolbar settings, select **Set Default**.

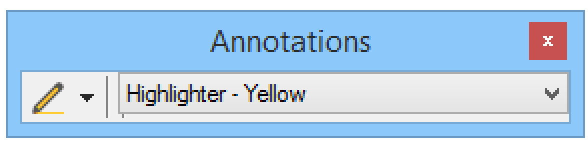
Additional Toolbars

Text Search Toolbar

User | Toolbars | Text Search Toolbar - Displays the Text Search toolbar, which provides another way of performing Internal Text Searches on an open document.

Annotation Toolbar

User | Toolbars | Annotation Toolbar - Displays the Annotation toolbar in the main Client toolbar.



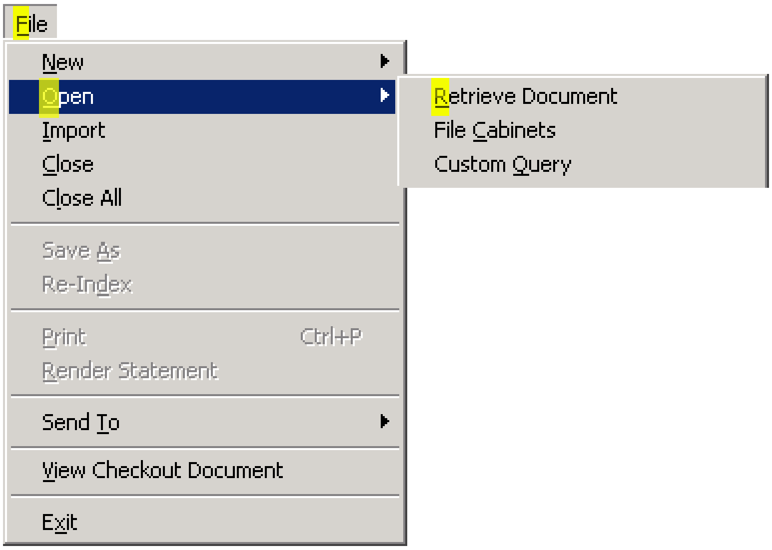
Client Module Shortcut Keys

Instead of using your mouse, you can use keyboard shortcuts to accomplish tasks.

Menu Bar Shortcuts

Press the **ALT** key to display all **ALT** key shortcut options. Shortcuts are represented by underlined letters in the menu bar, as seen in the highlighted areas in the example:

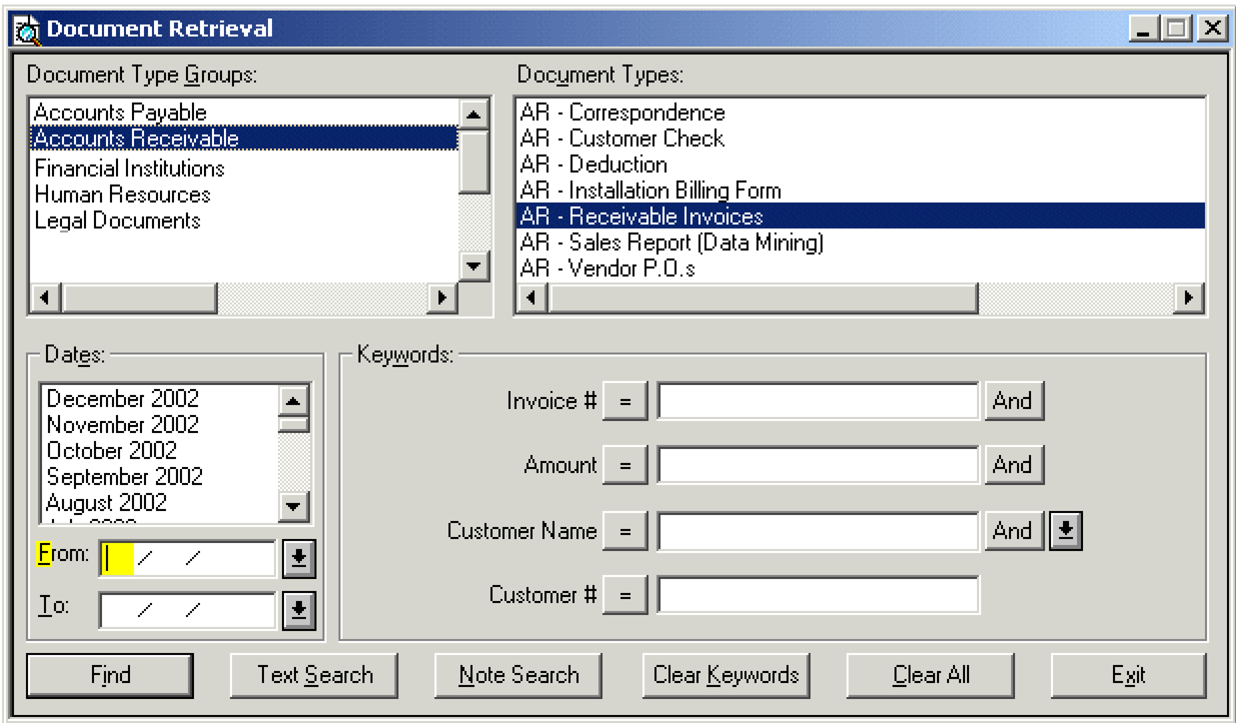
After pressing **ALT**, use shortcuts by pressing the appropriate keys. For example, pressing **ALT- F + O + R** opens the **Document Retrieval** dialog box.



When your cursor is positioned on the drop-down menu, use arrow keys to move vertically and horizontally through menu options. When your cursor is positioned on a vertical drop-down menu, choose a shortcut within that menu by typing the underlined character. For example, select **ALT- F** to enter the **File** menu, press **O** to display the **File** | **Open** menu.

Dialog Boxes

The majority of shortcuts in dialog boxes are represented by underlined characters. Press **ALT** and the underlined letter to select the field or button. For example, in the **Document Retrieval** dialog box, select **ALT + F** to position your cursor in the **From**: field. Press **ALT + W** to position the cursor in the first Keyword Type field in the Document Retrieval dialog box.



In any dialog box **ALT - -** opens the dialog box display options (minimize, maximize, close, etc.).

Note: When using some dialog boxes, you may not be able to access all drop-down menus using the shortcut keys. If a dialog box uses the same shortcut keys to perform an alternate task, the dialog shortcut overrides the menu shortcut. For example, the **Document Retrieval** dialog box uses **ALT + F** to move the cursor to the **From:** field; therefore, **ALT + F** would not bring up the **File** menu.

Global Function Keys

Shortcut	Action
F1	Accesses help files.
F10	Reveals ALT options in the menu bar.

Shortcut	Action
CTRL + F4	Closes the open dialog box. **Note:** This shortcut key is not available when viewing PDF documents.
ALT + Space	Opens the system menu for minimizing, maximizing, and restoring the program.
ALT + F4	Closes the OnBase Client.

Internal Mail Dialog Box Keys

Shortcut	Action
ALT + F	Selects the user name(s) in the **From** field.
ALT + M	Selects the text in the **Message** text box.
ALT + A	Sets the focus to the **Attachments** list.
ALT + V	Opens an attached file if one is selected in the **Attachments** list.
ALT + R	Opens a new mail message to reply to the received message.
ALT + D	Deletes the mail message.
ALT + O	Opens a new mail message to forward the received message.
ALT + X	Closes the mail message.

Document Search Results Lists and Open Documents

Document Search Results lists and open documents have the following shortcuts:

Accessing Dialog Boxes and Menus

The following keyboard shortcuts open dialog boxes and menus related to various functions:

Shortcut	Action
F8	Displays the **Import Document** dialog box. **Note:** Depending on your system settings, this shortcut may not be enabled. For more information, see your system administrator.
CTRL + H	Displays the **Document History** dialog box.

Shortcut	Action
CTRL + F3	Displays the **Internal Text Search** dialog box from an open text document.
CTRL + P	Displays the **Print** dialog box.
CTRL + Q	Displays the **Custom Query** window.
CTRL + R	Displays the **Document Retrieval** window.
CTRL + K	Displays the **Add/Modify Keyword** dialog box.
CTRL + N	Displays the **Add Note** dialog box for an open document.
CTRL + W	Displays the **Defined Cross-References** dialog box.
ALT + S	Displays the right-click menu.
F4 **Alt + Down Arrow**	Expands a selected drop-down list.

Navigating Documents

The following keyboard shortcuts allow you to navigate an open document:

Shortcut	Action
Page Up	Quickly scrolls up the current page. When you reach the beginning of a page in a multi-page document, scrolls to the previous page.
Page Down	Quickly scrolls down the current page. When you reach the end of a page in a multi-page document, scrolls to the next page.
Up Arrow	Slowly scrolls up the selected page. When you reach the beginning of a page in a multi-page document, scrolls to the previous page.
Down Arrow	Slowly scrolls down the selected page. When you reach the end of a page in a multi-page document, scrolls to the next page.
Mouse wheel	Slowly scrolls up or down the selected page. When you reach the beginning or end of a page in a multi-page document, scrolls to the previous or next page, respectively.
Right Arrow	Slowly scrolls position on the selected page right.
Left Arrow	Slowly scrolls position on the selected page left.
CTRL + Page Up	Navigates to the top of the previous page of a multi-page document.
CTRL + Page Down	Navigates to the top of the next page of a multi-page document.
CTRL + End	Navigates to the top of the last page of a multi-page image document.
Home	Navigates to the beginning of a text document.
End	Navigates to the end of a text document.

Note: If the cursor is in a text field of an HTML form, pressing **Ctrl + End** navigates to the end of the active field. Pressing **Ctrl + Home** navigates to the beginning of the active field. If the focus is on the E-Form itself, **Ctrl + End** will shift the display to the end of the E-Form.

Note: Navigation shortcut keys specific to text documents can be found in Navigating Text Documents on page 82, and navigation shortcut keys specific to E-Forms and HTML forms can be found in the E-Forms Help.

Changing Displays and Views

The following keyboard shortcuts change document and Document Viewer display options:

Shortcut	Action
CTRL and + (on numeric keypad)	Zooms in on an image document.
CTRL and - (on numeric keypad)	Zooms out of an image document.
CTRL + right arrow key	Rotates an image document right 90 degrees.
CTRL + left arrow key	Rotates an image document left 90 degrees.
CTRL + D	Displays all pages of a document in thumbnail view
CTRL + O	Displays an overlay on an open document, if an overlay has been configured for the Document Type.
CTRL + U	Turns the thumbnail display on and off.
CTRL + F6	From an open document, opens the previous document in the Document Search Results list. Some documents may not open with this shortcut, depending on the way they were set up to display through the viewing window.
CTRL + F7	From an open document, opens the next document in the Document Search Results list. Some documents may not open with this shortcut, depending on the way they were set up to display through the viewing window.

Executing Scripts

The following keyboard shortcuts allow you to quickly execute assigned scripts:

Shortcut	Action
CTRL + 1	Executes the VB Script assigned to VB1 in the Client Workstation options.
CTRL + 2	Executes the VB Script assigned to VB2 in the Client Workstation options.
CTRL + 3	Executes the VB Script assigned to VB3 in the Client Workstation options.

Selecting Documents in a List

To select multiple documents in a **Document Search Results** list, select a document and:

Shortcut	Action
Shift + Click the last document you want to select.	Select multiple consecutive documents.
Shift + PageDown (or End).	Select all documents following the selected document.
Shift + PageUp	Select all documents preceding the selected document.
CTRL + Click any documents	Select multiple nonconsecutive documents.

Selecting and Copying Text

The following keyboard shortcuts are only available for text documents.

Shortcut	Function
CTRL + A	Selects all the text in the open document.
CTRL + C	Copies selected text and opens the **Clipboard Options** dialog box.

Field Shortcut Keys

The following shortcuts are available when entering text into fields.

Note: These shortcuts do not apply to HTML fields, such as those found within an E-Form.

Shortcut	Action
F6 **or** **CTRL + T**	Adds another instance of the selected Keyword Type.
CTRL + H	Deletes characters from field.
CTRL + Z	Undoes previous typing.
CTRL + X	Cuts text from field.
CTRL + C	Copies text from field.

Shortcut	Action
CTRL + V	Pastes clipboard text into field. Pasting multiple lines of data into a Keyword Type field from the clipboard duplicates the Keyword Type field and populates each instance with a line of data from the clipboard. Blank lines in the clipboard data are skipped. Keyword Values that do not match the Keyword Type's Data Type or mask are not pasted. When multiple lines of data from the clipboard are pasted and a Keyword Value does not match the Keyword Type's Data Type or mask, subsequent lines of data will not be pasted, even if those Keyword Values match the Keyword Type's Data Type or mask. **Note:** When pasting multiple lines of data into a Single Instance Keyword Type Group, only the first line of data will be pasted and no new instances of the Keyword Type Group will be created.

Keyword Type Field Function Keys

The following Function Keys are available from Keyword Type fields:

Function Key	Action
F3	Toggles the Keyword Operator button.
F4	Toggles the Logical (Boolean) Operator button for duplicate Keyword Type fields.
F5	Expands a Keyword Type field's Keyword Select List (if one exists). **Note:** This function is only available if the **User | User Options | Keyword Select List** check box is selected on the **General** tab.
F6	Creates a duplicate Keyword Type field.
Ctrl+Del	When the focus is set to a Keyword Value that is part of a Multi-Instance Keyword Type Group, the entire instance of the Multi-Instance Keyword Type Group is deleted. **Note:** This function is only available during indexing or re-indexing.

Additional Features

Switching to Another User

OnBase allows you to switch between users without having to exit the Client.

To switch users within OnBase:

1. Select **File | Switch User**.

   The current user is logged out and a new OnBase login dialog box is displayed, allowing a different user to log in.

Note: You cannot change the **Data Source** when switching users in OnBase.

2. Enter a **User Name** and **Password** that can log in to the current data source.
3. Click **OK**.

Note: You cannot switch to a user that is configured with an Active Directory or LDAP password. This option is not available for published Runtime Clients. See your system administrator for more information.

Re-Launching the OnBase Client

OnBase allows you to re-launch the Client without having to exit and repeat the logon process.

To re-launch the Client:

1. Select **File | Re-launch Client.**

Note: This option is not available for published Runtime Clients. See your system administrator for more information.

Locking Your Workstation

You can lock your Client workstation when you are away from the computer.

To lock your Client workstation, select **File | Lock Workstation**.

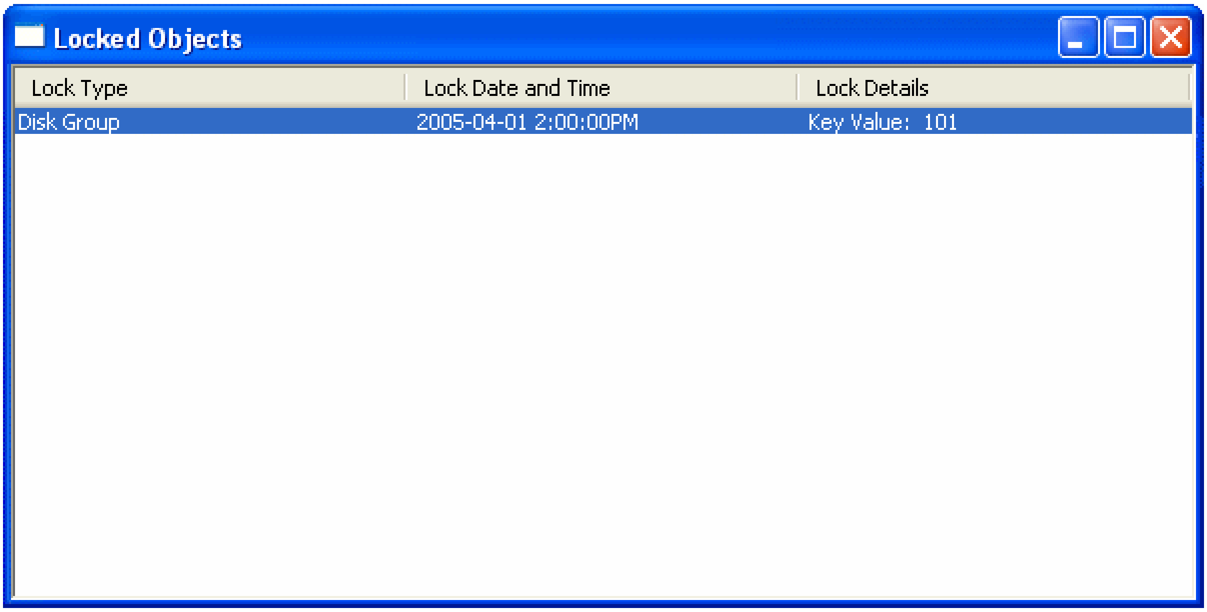
Once the workstation is locked, only the user or the system administrator can unlock it.

Note: This option is not available for published Runtime Clients. See your system administrator for more information.

Clearing Locked Objects

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

1. In the Client module, select the **User | Locked Objects** option.
2. The **Locked Objects** dialog box is displayed, showing locked objects that belong to you. The locked objects appear in sortable columns. To sort, click the heading that you wish to sort by.



3. From the list of locked objects, select the item you wish to unlock.
4. Right-click and select **Remove Selected**. A warning message displays asking if you want to remove the selected locked object.
5. Click **Yes** to unlock. Click **No** to retain the lock.
6. Click **Exit** to exit the dialog box.

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

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

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

DocPop and Unity Pop

Note: This section applies to working with OnBase through the Unity Client and Web Client.

DocPop and Unity Pop serve similar purposes, but they are not interchangeable. There are situations where one Pop integration should be used over the other.

Unity Pop assumes that users have the Unity Client installed, are operating the Unity Client in Service Mode, and have user accounts in OnBase. Unity Pop may be recommended for a Unity Client installation or where Unity Pop provides additional benefits over DocPop.

- Use DocPop if the Unity Client will not be installed on users' workstations. DocPop requires no OnBase software on the user's workstation, whereas Unity Pop requires the Unity Client.
- Use DocPop if Macintosh users require access to OnBase. Unity Pop cannot run on a Macintosh operating system. In environments where only some users have the Unity Client installed, use DocPop to ensure all users can view documents.
- Use DocPop for unauthenticated integrations or where OnBase documents are available to the public. For example, Unity Pop should not be used to provide public access to documents from a county Web site, because most public users would not have the Unity Client installed on their workstations.
- Use Unity Pop if users send external email messages from the Unity Client only to other users who have the Unity Client installed on their workstations. Use DocPop if messages are sent to users who may or may not have the Unity Client installed.

Document Retrieval

Dates

It is considered a best practice to select a document date or range of document dates from the **Dates** panel when retrieving documents. Selecting a document date or range of document dates expedites document retrieval.

Drop-Down Lists

When a Keyword Type is configured with a drop-down list, it is considered a best practice to type any known characters in the Keyword Value field before clicking the drop-down list icon. OnBase automatically appends a wildcard to the end of the string of known characters, and filters the available values from the drop-down list accordingly.

Wildcards

Wildcard searches impose extensive database load, and can negatively impact other users. Wildcard searches often generate a Document Search Results list that is much larger than necessary, and is not useful.

To ensure high database performance and execute queries more efficiently, the following are considered best practices for using wildcards when searching:

- Only use leading wildcards in searches when attempting to retrieve documents with complex or misspelled Keyword Values.
- Provide as many known characters as possible before using a wildcard, preferably four or more.

Importing

Text Documents

To ensure correct functionality for all text documents, it is considered a best practice to remove all Tab characters from text documents before importing them into OnBase. Tab characters that are not removed are converted to spaces when imported into OnBase.

Indexing

Multi-Instance Keyword Type Groups

When duplicating a Multi-Instance Keyword Type Group, it is considered a best practice to index all Keyword Values in the Multi-Instance Keyword Type Group, even if only one Keyword Value is different between the original Multi-Instance Keyword Type Group and the duplicate Multi-Instance Keyword Type Group.

Logging On

Command Line Switches

It is considered a best practice to apply the -**ODBC** and -**UN** command line switches to the OnBase Client shortcut. When both of these command line switches are applied, you only need to type your password to log on to OnBase.

Caution: Do not use the -**PW** command line switch. Storing your OnBase password in a command line where other users can access it poses a security risk.

User Options

User Options allow each OnBase user to customize the appearance and functionality of OnBase. Your OnBase administrator may have already configured certain User Options for your workstation. It is considered a best practice to evaluate your use of OnBase to determine if your User Options are configured correctly, or if the selection of additional User Options can enhance your use of OnBase. For example, each time you log onto OnBase, you click the **Open Custom Queries** toolbar button to open the **Custom Query** dialog box. By selecting the **Custom Query List** User Option, the **Custom Query** dialog box is automatically displayed each time you log onto OnBase. You no longer need to click the **Open Custom Queries** toolbar button.

Document List Refresh

Depending on your OnBase Client configuration, you may be able to configure your own **Document List Refresh Rate**. If you can configure your own **Document List Refresh Rate**, it is considered a best practice to configure this setting for a value that is appropriate for your business process, or to disable this option by selecting the **Disable document list refresh** check box.

Each time the Document Search Results list refreshes, the same query that generated the initial list of search results is run on the database. If many users have this setting selected, it can cause performance issues for your database.

For example, if it typically takes you two minutes to work on a document you opened from a Document Search Results list, set your **Document List Refresh Rate** to **120**. However, if the time you spend working on documents you open from a Document Search Results list varies, select the **Disable document list refresh** check box. You will still be able to refresh the Document Search Results list by right-clicking and selecting **Refresh**.

QUICK REFERENCE GUIDE

The following Quick Reference Guide is designed to serve as a resource you can quickly reference for the keyboard shortcuts available while using the OnBase Client.

Global	
F1	Accesses the help files.
F10	Reveals menu bar **Alt** options.
Ctrl + F4	Closes the open dialog box. **Note:** This shortcut key is not available when viewing PDF documents.
Alt + Space	Opens the system menu for minimizing, maximizing, and restoring the program.
Alt + F4	Closes the program.

Text and Keyword Type Fields	
F6 or Ctrl + T	Adds another instance of the selected Keyword Type.
Ctrl + H	Deletes characters from field.
Ctrl + Z	Undoes previous typing.
Ctrl + X	Cuts text from field.
Ctrl + C	Copies text from field.
Ctrl + V	Pastes clipboard text into field. For more information on pasting data into Keyword Type fields, see the Client documentation.

Keyword Type Fields	
F3	Toggles Keyword Operator button.
F4	Toggles Logical (Boolean) Operator button for duplicate Keyword Type fields.
F5	Expands a Keyword Type field's Keyword Select List (if one exists). **Note:** This function is only available if the **Keyword Select List** user option in the **General** tab is selected.
F6	Creates a duplicate Keyword Type field.
Ctrl + Del	During indexing or re-indexing, when focus is set to a Keyword Value that is part of a Multi-Instance Keyword Type Group, the entire instance of the Multi-Instance Keyword Type Group is deleted.

Accessing Dialog Boxes and Menus	
F8	Displays the Import Document dialog box. **Note:** Depending on system settings, this shortcut may not be enabled.
Ctrl + H	Displays **Document History** dialog box.
Ctrl + F3	Displays **Internal Text Search** dialog box from an open text document.
Ctrl + P	Displays **Print** dialog box.
Ctrl + Q	Displays **Custom Query** window.
Ctrl + R	Displays **Document Retrieval** window.
Ctrl + K	Displays **Add/Modify Keyword** dialog box.
Ctrl + N	Displays **Add Note** dialog box for an open document.
Ctrl + W	Displays **Defined Cross-References** dialog box for an open document.

Accessing Dialog Boxes and Menus	
Alt + S	Displays right-click menu.
F4 or Alt + Down Arrow	Expands a selected drop-down list.

Navigating Documents	
Page Up	Quickly scrolls up the current page.
Page Down	Quickly scrolls down the current page.
Up Arrow	Slowly scrolls up on the current page.
Down Arrow	Slowly scrolls down on the current page.
Mouse wheel	Slowly scrolls up or down on the current page.
Right Arrow	Slowly scrolls right on the current page.
Left Arrow	Slowly scrolls left on the current page.
Ctrl + Page Up	Navigates to the top of the previous page of a multi-page document.
Ctrl + Page Down	Navigates to the top of the next page of a multi-page document.
Ctrl + End	Navigates to the top of the last page of a multi-page image document. In an E-Form, navigates to the end of an active field. When focus is not on any field, navigates to the end of the form itself.
Ctrl + Home	In an E-Form, navigates to the beginning of an active field. When focus is not on any field, navigates to the beginning of the form itself.
Home	Navigates to the beginning of a text document.
End	Navigates to the end of a text document.

Changing Displays and Views	
Ctrl and + (on numeric keypad)	Zooms in on an image document.
Ctrl and - (on numeric keypad)	Zooms out of an image document.
Ctrl + right arrow key	Rotates an image document right 90 degrees.
Ctrl + left arrow key	Rotates an image document left 90 degrees.
Ctrl + D	Displays all pages of a document in thumbnail view.
Ctrl + O	Displays an overlay on an open document, if an overlay has been configured.
Ctrl + U	Turns the thumbnail display on and off.
Ctrl + F6	From an open document, opens previous document in the Document Search Results list. **Note:** Some documents may not open with this shortcut, depending on how they are configured to display in the viewer.

Changing Displays and Views	
Ctrl + F7	From an open document, opens the next document in the Document Search Results list. **Note:** Some documents may not open with this shortcut, depending on how they are configured to display in the viewer.

Executing Scripts	
Ctrl + 1	Executes the VB Script assigned to VB1 in Client Workstation options.
Ctrl + 2	Executes the VB Script assigned to VB2 in Client Workstation options.
Ctrl + 3	Executes the VB Script assigned to VB3 in Client Workstation options.

Selecting Documents in a List	
Shift + Click last document you want to select	Select multiple consecutive documents.
Shift + Page Down (or End)	Select all documents following the selected document.
Shift + Page Up	Select all documents preceding the selected document.
Ctrl + Click any documents	Select multiple nonconsecutive documents.

Selecting and Copying Text	
Ctrl + A	Selects all text in an open text document.
Ctrl + C	Copies selected text in a text document and opens the **Clipboard Options** dialog box.

Internal Mail Dialog Box	
Alt + F	Selects user name(s) in **From** field.
Alt + M	Selects text in **Message** text box.
Alt + A	Sets focus to **Attachments** list.
Alt + V	Opens selected attached file from **Attachments** list.
Alt + R	Opens new mail message to reply to received message.
Alt + D	Deletes mail message.
Alt + O	Opens new mail message to forward received message.
Alt + X	Closes mail message.

Advanced File Cabinet Window	
Tab	Navigates counter-clockwise to next pane.
Shift + Tab	Navigates clockwise to next pane.
Esc	Closes an open pop-up window.

Menu Bar Alt-Key Shortcuts

Press **Alt** to display all **Alt**-key shortcut options in the menu bar. Shortcuts are represented by underlined letters in the menu bar.

After pressing **Alt**, use shortcuts by pressing the appropriate keys. For example, pressing **Alt, F, O, R** opens the **Document Retrieval** dialog box.

When your cursor is positioned on the drop-down menu, use the **Up** and **Down** arrow keys to move through menu options.

When your cursor is positioned on a vertical drop-down menu, choose a shortcut within that menu by typing the underlined character. For example press **Alt, F** to enter the **File** menu, press **O** to display the **File | Open** menu.

Dialog Box Alt-Key Shortcuts

Press **Alt** to display all **Alt**-key shortcut options in a dialog box. Shortcuts are represented by underlined letters in the dialog-box buttons, field names, etc.

After pressing **Alt**, use shortcuts by pressing the appropriate keys. For example, in the **Document Retrieval** dialog box, press **Alt, F** to position your cursor in the **From** field. Press **Alt, W** to position the cursor in the first Keyword Type field in the **Document Retrieval** dialog box.

In any dialog box, **Alt, -** opens the dialog box display options (minimize, maximize, close, etc.).