



Content Connector for Microsoft SharePoint

Reference Guide

Includes:

Installation Guide

Administration Guide

User Guide

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Content Connector for Microsoft SharePoint exposes batch-processed documents within OnBase through SharePoint, allowing you to take advantage of OnBase's robust document management capabilities and SharePoint's familiar user interface.

Content Connector allows documents to be automatically uploaded to SharePoint from OnBase based on configured values. The Content Connector works with OnBase processing modules, such as COLD, DIP, and Document Imaging. Within seconds, batches of documents imported through these modules can be automatically uploaded to the SharePoint server and made available from the SharePoint site as library documents or list item attachments.

Licensing

Content Connector for Microsoft SharePoint requires the following licenses:

- Content Connector for Microsoft SharePoint
- An Import Processor or Document Imaging license
- A Web Server license
- A valid Client license

If your solution includes processing documents through OnBase Workflow, a valid Workflow license is also required.

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



Content Connector for Microsoft SharePoint

Installation Guide

Requirements

Content Connector for Microsoft SharePoint requires the OnBase Web Server and Application Server. See the **Web Server** and **Application Server** module reference guides for information on installing these servers.

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

General Requirements

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

- Microsoft .NET Framework Requirements

Note: This version of .NET must be installed on the server where OnBase Configuration Management and the Content Connector Service is installed.

Third-Party Software

To use Content Connector for Microsoft SharePoint, you must have one of the following:

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

Licensing

See [Licensing on page 1](#) for licensing requirements.

Pre-Installation

Before you begin installing Content Connector for Microsoft SharePoint, note the following requirements:

- The OnBase Web Server and the SharePoint server must both belong to the same Internet Explorer security zone on client workstations in order for OnBase Web Parts to be displayed correctly in SharePoint.

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

Note: The Content Connector does not work with Kerberos authentication. If the SharePoint site is set up for Kerberos authentication instead of NT, then the Content Connector cannot connect to the site.

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

Installer Options

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

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

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

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

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

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

ClickOnce deployments also have the following advantages:

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

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

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

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

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

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

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

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

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

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

Installation for SharePoint 2016

This section describes how to install Content Connector for Microsoft SharePoint 2016.

To install Content Connector for Microsoft SharePoint on your SharePoint farm, complete the following tasks:

- [Installing OnBase Configuration Management \(SharePoint 2016\) on page 7](#)
- [Installing the Content Connector Service \(SharePoint 2016\) on page 11](#)
- [Configuring General Settings: Web Server and Workflow \(SharePoint 2016\) on page 13](#)
- [Applying Browser Settings for the Viewer \(SharePoint 2016\) on page 16](#)
- [Adding a Unique Icon for Archived Documents \(SharePoint 2016\) on page 17](#)
- [Turning off Strict File Handling \(SharePoint 2016\) on page 17](#)
- [Configuring the OnBase Application Server \(SharePoint 2016\) on page 18](#)
- [Configuring the OnBase Web Server \(SharePoint 2016\) on page 20](#)

If your solution used the ad-hoc archive method, ensure the OnBase database is configured for Active Directory authentication. OnBase uses the Active Directory credentials of the user logged on to the machine to evaluate the user's Document Type privileges during ad-hoc archival.

Tip: To assist with navigation, the title of each procedure contains the versions of SharePoint the procedure applies to. This convention helps ensure that you are reading the correct procedure for your version of SharePoint.

Installing OnBase Configuration Management (SharePoint 2016)

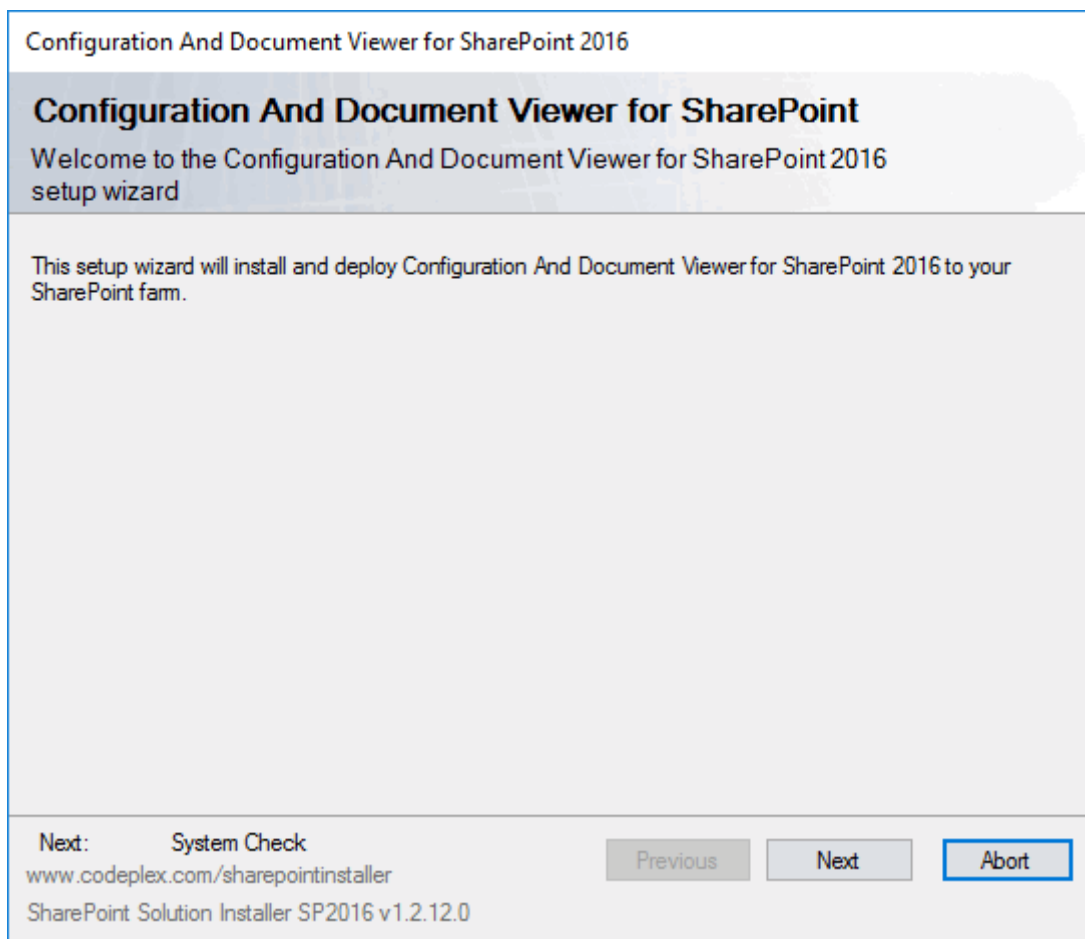
OnBase Configuration Management is a required component of the following SharePoint integrations: Ad-Hoc Scanning for Microsoft SharePoint, Archive Services for Microsoft SharePoint, and Content Connector for Microsoft SharePoint. If you have already installed OnBase Configuration Management to the Web applications where users will be archiving documents using Archive Services, then you do not need to repeat this procedure.

Note: Make sure you are logged on as a SharePoint site collection administrator before running the installer.

To install OnBase Configuration Management:

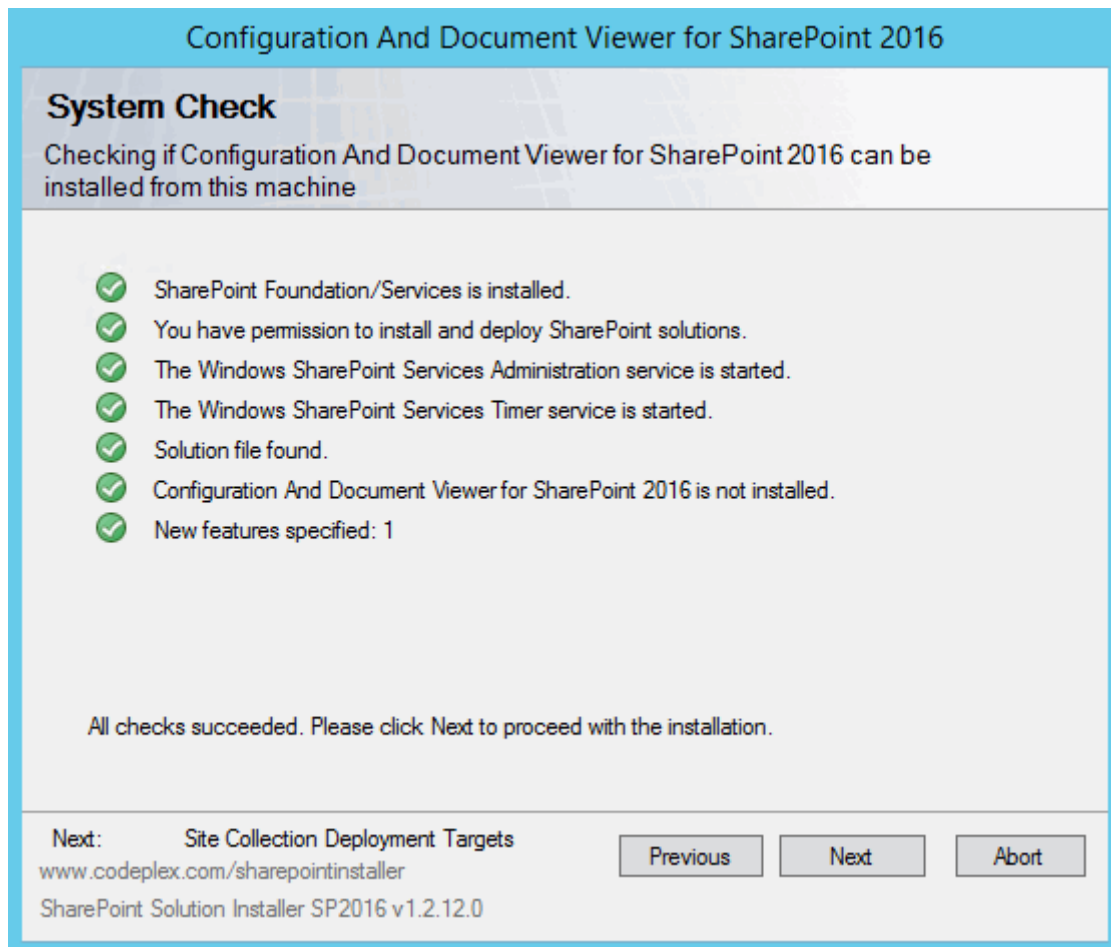
1. Double-click the Configuration **Setup2016.exe** in the **Configuration** folder of your installation source files.

If you have access to the Core Services build, the **Setup2016.exe** for SharePoint 2016 is located in the following directory: **..\install\SharePoint\SharePoint2016\Configuration**. The **Configuration And Document Viewer for SharePoint 2016** wizard is displayed.



2. Click **Next**. The **System Check** page is displayed.

3. A system check is performed to determine whether OnBase Configuration Management can be installed on the server.

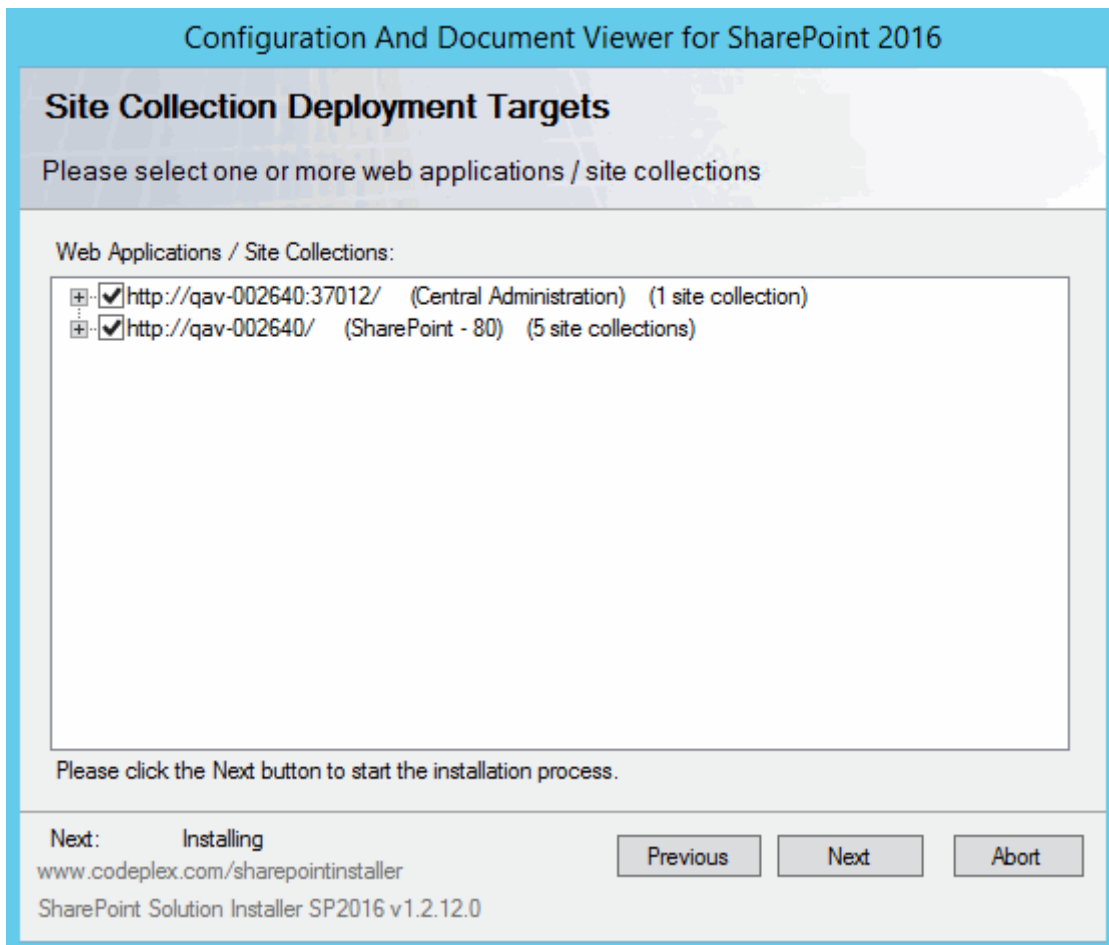


Depending on the results, do one of the following:

- If any of the checks fail, note which checks failed and click **Abort**. Address the failed requirements, and then restart the installation.

Note: On the **System Check** page, the term **solution file** refers to the **OnBaseConfiguration.wsp** file located in the same directory as the **Setup2016.exe** file.

- If the checks pass, click **Next**. The **Site Collection Deployment Targets** page is displayed.



4. Select only the Web applications where you want to deploy the integration. By default, all Web applications are selected.

Note: The Central Administration application cannot be deselected because OnBase Configuration Management is administered from this application.

5. Click **Next**. The installer distributes the files required to configure Content Connector for Microsoft SharePoint. The **Installation Successfully Completed** screen is displayed showing where the integration is deployed for each Web application.
6. Click **Close**.
7. Verify the installation in SharePoint 2016 Central Administration.
 - a. On the Central Administration homepage, click the gear button to display its menu.
 - b. Select **Site Settings**. The **Site Settings** page is displayed.

- c. Under **Site Collection Administration**, click **Site Collection Features**.

Note: To access **Site Collection Features**, you must be logged on as a site collection administrator.

- d. Your site collection should now include a feature named **OnBase Configuration Management**, and its status should be **Active**.



OnBase Configuration Management

Activating this feature will allow an administrator to configure OnBase Settings

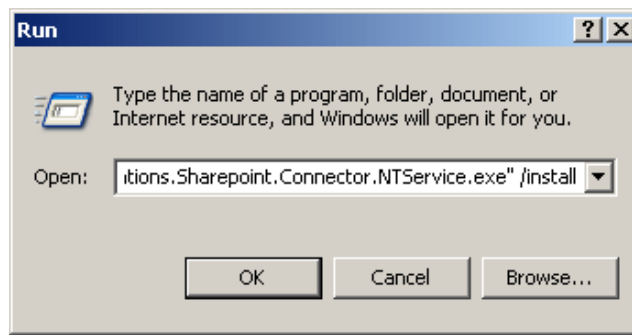
Installing the Content Connector Service (SharePoint 2016)

The Content Connector service checks for and uploads batches of OnBase documents to SharePoint. Install this service on a server where OnBase Configuration Management is installed, not a Web Front End (WFE) machine.

Note: The Content Connector does not work with Kerberos authentication. If the SharePoint site is set up for Kerberos authentication instead of NT, then the Content Connector cannot connect to the site.

1. Copy the **Content Connector** folder from your installation source files to the server. This folder is located in the following directory of the OnBase Core Services build:
`..\install\SharePoint\SharePoint 2016\Content Connector`
2. Open the **Hyland.Applications.Sharepoint.Connector.NTService.exe.config** file in a text editor.
3. Modify the following values:
 - **AppNetRoot** - Set to the **dmsVirtualRoot** of the OnBase Web Server.
 - **ProcessInterval** - Set to the interval, in milliseconds, that the Content Connector checks for new documents. The default value is **5000** milliseconds, or 5 seconds. Depending on your solution, you may want the Content Connector to check for and upload newly committed batches less frequently. When choosing an interval, keep in mind that lower intervals can reduce server performance.
 - **ServiceAccountUsername** - Set to the service account user name.
 - **ServiceAccountPassword** - Set to the service account password.
4. Save and close the file.
5. Open a **Run** dialog box by selecting **Start | Run**.
6. Delete any existing values from the **Open** field in the **Run** dialog box. By default, the **Open** field contains the name of the last file or folder you opened.
7. Drag the **Hyland.Applications.Sharepoint.Connector.NTService.exe** file from its copied location to the **Run** dialog box. Double-check to ensure you are using the .exe file.

8. After the end of the file name, add a space and type **/install**.



9. Click **OK**. The service is installed and available in the Windows Services console as **Hyland SharePoint Content Connector**.
10. Open the Services console by entering services.msc in a **Run** dialog box.
11. Double-click **Hyland SharePoint Content Connector**.
12. Click the **Log On** tab.
13. Select **This account**.
14. Enter the credentials of a domain user who has SharePoint **Contribute** permissions to the lists and libraries that the Content Connector needs to update. If the OnBase Web Server is not configured for anonymous access, then this user must also be a valid account that the IIS server running the Web Server can authenticate.

Note: If the Content Connector is configured to create list items, the user account entered here will be displayed as the items' creator in SharePoint.

15. Click **OK**.
16. Restart the **Hyland SharePoint Content Connector** service.

Modifying the Content Connector Service's Configuration

Use the following steps to modify the Content Connector service's configuration file after the service is installed.

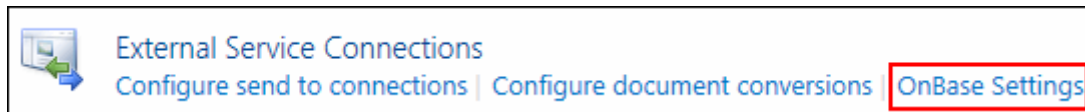
1. In the Windows Services console, stop the Hyland SharePoint Content Connector service.
2. Open the **Hyland.Applications.Sharepoint.Connector.NTService.exe.config** file in a text editor.
3. Modify the values as needed. See [Installing the Content Connector Service \(SharePoint 2016\) on page 11](#) for information on the values to modify.
4. Save and close the file.
5. Start the Hyland SharePoint Content Connector service.

Configuring General Settings: Web Server and Workflow (SharePoint 2016)

Before configuring Content Connector for Microsoft SharePoint, first provide the URL to the OnBase Web Server in Central Administration. Then, specify whether to include OnBase Workflow elements in the viewer that displays OnBase documents. Workflow elements include ad-hoc tasks, a work folder displaying related OnBase documents, and a status bar showing the life cycles and queues where the document resides.

Follow these steps for 2016 versions of SharePoint.

1. Open SharePoint Central Administration.
2. Click **General Application Settings** from the left side of the page.
3. Under **External Service Connections**, click **OnBase Settings**.



The **General Settings** page is displayed.

4. In the **OnBase URL** field, type the URL of the OnBase Web Server. For example: `http://webserver03/AppNet`

 A screenshot of the 'OnBase Settings' page in SharePoint Central Administration. The page is divided into two columns. The left column contains labels and descriptions for various settings: 'OnBase URL' (Specify the URL for the OnBase Web Server.), 'Show Workflow in viewer' (Specify if Workflow should be displayed in the OnBase viewer.), 'Use ActiveX Viewer' (Specify if ActiveX or HTML controls are used by the OnBase viewer.), 'Install OnBase Initialization Timer Service' (Installing and activating this service will keep the application initialized across server recycles (optional)), 'Document Pop Type' (Specify the Pop Type to be used by the OnBase Viewer), and 'Service Account' (Specify the service account credentials to use). The right column contains the corresponding input fields: a text box for 'OnBase URL', checkboxes for 'Show Workflow in viewer' and 'Use ActiveX Viewer', a checked checkbox for 'Install OnBase Initialization Timer Service', a dropdown menu for 'Document Pop Type' (with options: DocPop, PDFPop, UnityPop, AEPop), and text boxes for 'Username' and 'Password'. At the bottom right, there are 'OK' and 'Cancel' buttons.

5. Select additional options, if needed:

Option	Description
Show Workflow viewer	<p>Select this option to provide OnBase Workflow functionality in the OnBase viewer. For information about the Workflow viewer, see Workflow Viewer on page 71.</p> <hr/> <p>Note: When this option is selected, the OnBase URL specified here must use the same case as the dmsVirtualRoot value in the Web Server's Web.config. Otherwise, the viewer displays an error.</p> <hr/>
Use ActiveX Viewer	<p>Select this option to use the OnBase ActiveX viewer. Clear this option to use the OnBase HTML viewer.</p> <p>Use the HTML viewer in mixed browser environments or if users should not have the OnBase ActiveX controls installed on their workstations.</p> <p>Available features vary per viewer. See the OnBase Web Server module reference guide for differences between the ActiveX Web Client and HTML Web Client.</p>
Install OnBase Initialization Timer Service	<p>Select to install the OnBase Initialization Timer service, which checks the Web Server and Application Server every minute to determine whether they are initialized, or prepared to receive requests from the OnBase SharePoint integrations.</p> <p>If the Web Server and Application Server are not initialized (for example, because their application pools were recycled), then the service initializes them so that requests from the OnBase SharePoint integrations will be processed more quickly.</p> <p>If you choose not to use the service, then users may have to wait while the OnBase Web or Application Server initializes before their requests are processed.</p> <p>To uninstall the service, clear this option.</p>

Option	Description
Document Pop Type	<p>Specify the Pop Type to be used to display documents in the OnBase Viewer.</p> <p>Select DocPop to view documents in the default viewer.</p> <hr/> <p>Note: See the DocPop documentation for more information.</p> <hr/> <p>Select PDFPop to view documents in the web-based PDF viewer. All documents opened with PDFPop behave as PDFs.</p> <hr/> <p>Note: See the Web Client documentation for more information.</p> <hr/> <p>Select UnityPop to view documents in the Unity Client using UnityPop links.</p> <hr/> <p>Note: See the Unity Client documentation for more information. The Unity Client license is required to use this option.</p> <hr/> <p>Select AEPop to use Application Enabler Pop to view documents.</p> <hr/> <p>Note: See the Application Enabler documentation for more information. The Application Enabler license is required to use this option.</p> <hr/>
Service Account	<p>Specify the service account credentials to use.</p> <p>In the Username field, type the service account user name.</p> <p>In the Password field, type the service account password.</p> <hr/> <p>Note: The service account credentials are required.</p> <hr/>

- Click **OK**. If you selected **Install OnBase Initialization Timer Service**, continue to the following procedure, [Enabling the Initialization Timer Service on page 15](#).

Enabling the Initialization Timer Service

If you selected **Install OnBase Initialization Timer Service** under General Settings, then you must enable the service in Timer Job Definitions.

- From Central Administration, click **Monitoring** from the left side of the page.
- Under **Timer Jobs**, click **Review job definitions**.

- Click the **OnBase Initialize (Keep Alive) Job** link from the list. The **Edit Timer Job** page is displayed.

Job Title	OnBase Initialize (Keep Alive) Job	
Job Description		
Job Properties This section lists the properties for this job.	Web application:	
	Last run time:	N/A
Recurring Schedule Use this section to modify the schedule specifying when the timer job will run. Daily, weekly, and monthly schedules also include a window of execution. The timer service will pick a random time within this interval to begin executing the job on each applicable server. This feature is appropriate for high-load jobs which run on multiple servers on the farm. Running this type of job on all the servers simultaneously might place an unreasonable load on the farm. To specify an exact starting time, set the beginning and ending times of the interval to the same value.	This timer job is scheduled to run: <input checked="" type="radio"/> Minutes Every <input type="text" value="5"/> minute(s) <input type="radio"/> Hourly <input type="radio"/> Daily <input type="radio"/> Weekly <input type="radio"/> Monthly	
<div> <input type="button" value="Enable"/> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </div>		

- Click **Enable**.
- Click **OK**.

Applying Browser Settings for the Viewer (SharePoint 2016)

To use the OnBase viewer, Content Connector for Microsoft SharePoint requires the following security settings to be set to **Enable** for the Web Server's security zone in Internet Explorer:

- **Access data sources across domains**
- **Navigate sub-frames across different domains**

To change settings for the Web Server's security zone, select the zone from the **Security** tab and click **Custom Level**. The settings are in the **Miscellaneous** category.

Adding a Unique Icon for Archived Documents (SharePoint 2016)

When a document has been archived to OnBase and removed from the SharePoint database, the following icon can be displayed next to the document name:



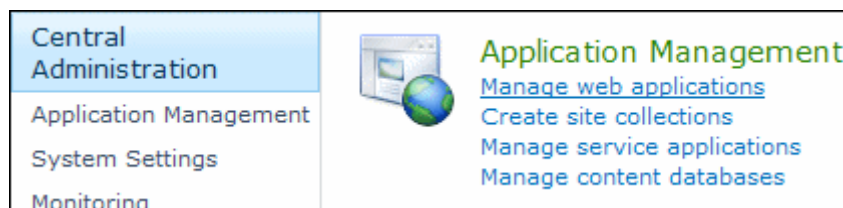
To have this icon displayed next to OnBase documents, complete the following steps:

1. Open the DOCICON.xml file in a text editor. For SharePoint 2016, this file is located in the following directory:
C:\Program Files\Common Files\Microsoft Shared\web server extensions\16\TEMPLATE\XML
2. Under the **<ByExtension>** element, add the following text on one line:
<Mapping Key="obctx" Value="loclib16.GIF"
OpenControl="OnBase.OpenDocuments" />
3. Save the file.

Turning off Strict File Handling (SharePoint 2016)

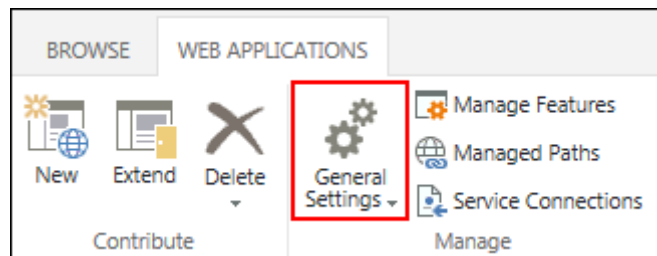
To allow the opening of documents in DocPop, the SharePoint application's Browser File Handling must be set to **Permissive**.

1. Open SharePoint Central Administration.
2. Click the **Manage web applications** link under **Application Management**.



3. Select the Web application where you installed Content Connector for Microsoft SharePoint.

- Click **General Settings** from the ribbon.



- Under **Browser File Handling**, select **Permissive**.
- Click **OK**.

Configuring the OnBase Application Server (SharePoint 2016)

The OnBase Application Server's web.config file must be modified to enable Content Connector for Microsoft SharePoint. These steps require you to have a Service Account configured in OnBase. For more information about Service Accounts, see the **System Administration** module reference guide.

Note: The Application Server's web.config file may have already been updated for another SharePoint integration. If the following settings are already configured, do not repeat this procedure.

- Locate the web.config file from the Application Server's virtual directory. In a default installation, the **web.config** file is located at **C:\inetpub\wwwroot\AppServer**.
- Find the `<Hyland.Applications.Sharepoint.Services>` element.
- Modify the **max** and **min** values for the **PoolSize** setting if needed. When many users are accessing the service, increasing these values allows for faster connections, but it also results in higher memory consumption on the server.
- Ensure the **ExpandKeysets** setting **value** is set to **true**. This setting enables the automatic population of Keyword Type fields based on an existing primary value.

Caution: If the **ExpandKeysets** setting **value** is set to **false**, AutoFill Keyword Sets won't be populated on documents archived using Archive Services or Ad-Hoc Scanning for Microsoft SharePoint.

- Save and close the web.config file.

Example

The following example illustrates the new web.config entries in context. The Application Server's web.config file contains configuration information for other OnBase services and modules, but this example displays information for only Content Connector for Microsoft SharePoint.

```
<configuration>
  <configSections>
    <section name="Hyland.Applications.Sharepoint.Services"
      type="Hyland.Applications.Sharepoint.Services.ConfigurationHandler
        ,Hyland.Applications.Sharepoint.Services" />
  </configSections>
  <Hyland.Applications.Sharepoint.Services>
    <PoolSize max="5" min="1" />
    <ExpandKeysets value="true" />
  </Hyland.Applications.Sharepoint.Services>
  ...
</configuration>
```

Configuring Optimization for Windows Authentication

If your Application Server is configured for Active Directory Enhanced, the Application Server must be configured to be optimized for Windows Authentication to use Content Connector for Microsoft SharePoint. This is configured using the Web Application Management Console. For more information on using the Web Application Management Console, see the **Web Application Management Console** documentation.

To configure optimization for Windows Authentication:

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

Configuring the OnBase Web Server (SharePoint 2016)

Because the OnBase viewer can use DocPop, the DocPop type specified on the **General Settings** page of SharePoint Central Administration must be configured in the OnBase Web Server's **Web.config** file to enable this option. This file resides in the Web Server's virtual directory (which is named **AppNet** in a default installation).

To configure the Web Server's **Web.config** file:

1. Locate the element corresponding to the DocPop type chosen in SharePoint Central Administration:

Document Pop Type	Element
DocPop	Hyland.Web.DocPop
PDFPop	Hyland.Web.PdfPop
UnityPop	Hyland.Web.FormPop
AEPop	Hyland.Web.FolderPop

2. Within the element, change the **datasource** value to the name of the ODBC data source configured on the Application Server.
3. Within the same element, change the **embedded** value to **true**.
4. Save the **Web.config** file.

Note: Additional settings are required for UnityPop and AEPop. For more information, see the Unity Client module reference guide.

Depending on your solution's configuration, additional DocPop settings may need to be configured to support Active Directory authentication. For more information about DocPop settings, see the **Web Server** documentation.

If your solution uses the ad-hoc archive method, ensure the OnBase database is configured for Active Directory authentication. OnBase uses the Active Directory credentials of the user logged on to the machine to evaluate the user's Document Type privileges during ad-hoc archival.

For ease of use, configure the OnBase Web Server for Active Directory authentication as described in the Installation chapter of the Web Server module reference guide. This configuration will make it easier to troubleshoot authentication, if necessary.

Note: In previous versions of OnBase, ad-hoc archival required the Web Server to be configured for OnBase's Integration for Single Sign-On. This is no longer a requirement, but the database must be configured for Active Directory authentication to allow ad-hoc archival.

DocPop Authentication Considerations

When documents are retrieved from OnBase through the document library with **DocPop**, OnBase uses the authentication method specified for DocPop in the OnBase Web Server's Web.config file. If the OnBase document is retrieved through a library that is a Web Part on a page that includes OnBase Web Parts, the DocPop authentication method is overridden by the method used by the OnBase Web Parts. For example, if the Web Parts are configured for Active Directory authentication, then DocPop will attempt to use Active Directory authentication regardless of the DocPop settings in the Web Server's Web.config.

Installation for SharePoint 2019

This section describes how to install Content Connector for Microsoft SharePoint 2019.

To install Content Connector for Microsoft SharePoint on your SharePoint farm, complete the following tasks:

- [Installing OnBase Configuration Management \(SharePoint 2019\) on page 22](#)
- [Installing the Content Connector Service \(SharePoint 2019\) on page 25](#)
- [Configuring General Settings: Web Server and Workflow \(SharePoint 2019\) on page 27](#)
- [Applying Browser Settings for the Viewer \(SharePoint 2019\) on page 30](#)
- [Adding a Unique Icon for Archived Documents \(SharePoint 2019\) on page 31](#)
- [Turning off Strict File Handling \(SharePoint 2019\) on page 31](#)
- [Configuring the OnBase Application Server \(SharePoint 2019\) on page 32](#)
- [Configuring the OnBase Web Server \(SharePoint 2019\) on page 34](#)

If your solution used the ad-hoc archive method, ensure the OnBase database is configured for Active Directory authentication. OnBase uses the Active Directory credentials of the user logged on to the machine to evaluate the user's Document Type privileges during ad-hoc archival.

Tip: To assist with navigation, the title of each procedure contains the versions of SharePoint the procedure applies to. This convention helps ensure that you are reading the correct procedure for your version of SharePoint.

Installing OnBase Configuration Management (SharePoint 2019)

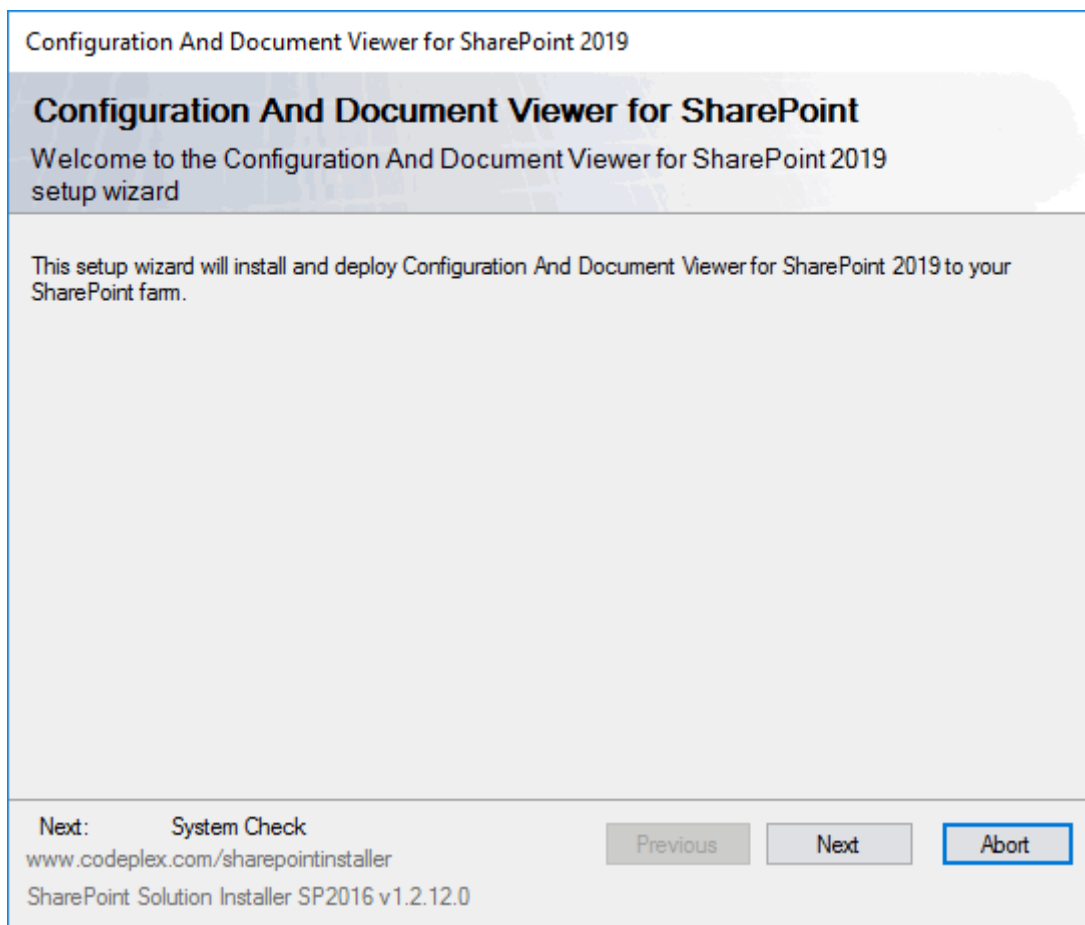
OnBase Configuration Management is a required component of the following SharePoint integrations: Ad-Hoc Scanning for Microsoft SharePoint, Archive Services for Microsoft SharePoint, and Content Connector for Microsoft SharePoint. If you have already installed OnBase Configuration Management to the Web applications where users will be archiving documents using Archive Services, then you do not need to repeat this procedure.

Note: Make sure you are logged on as a SharePoint site collection administrator before running the installer.

To install OnBase Configuration Management:

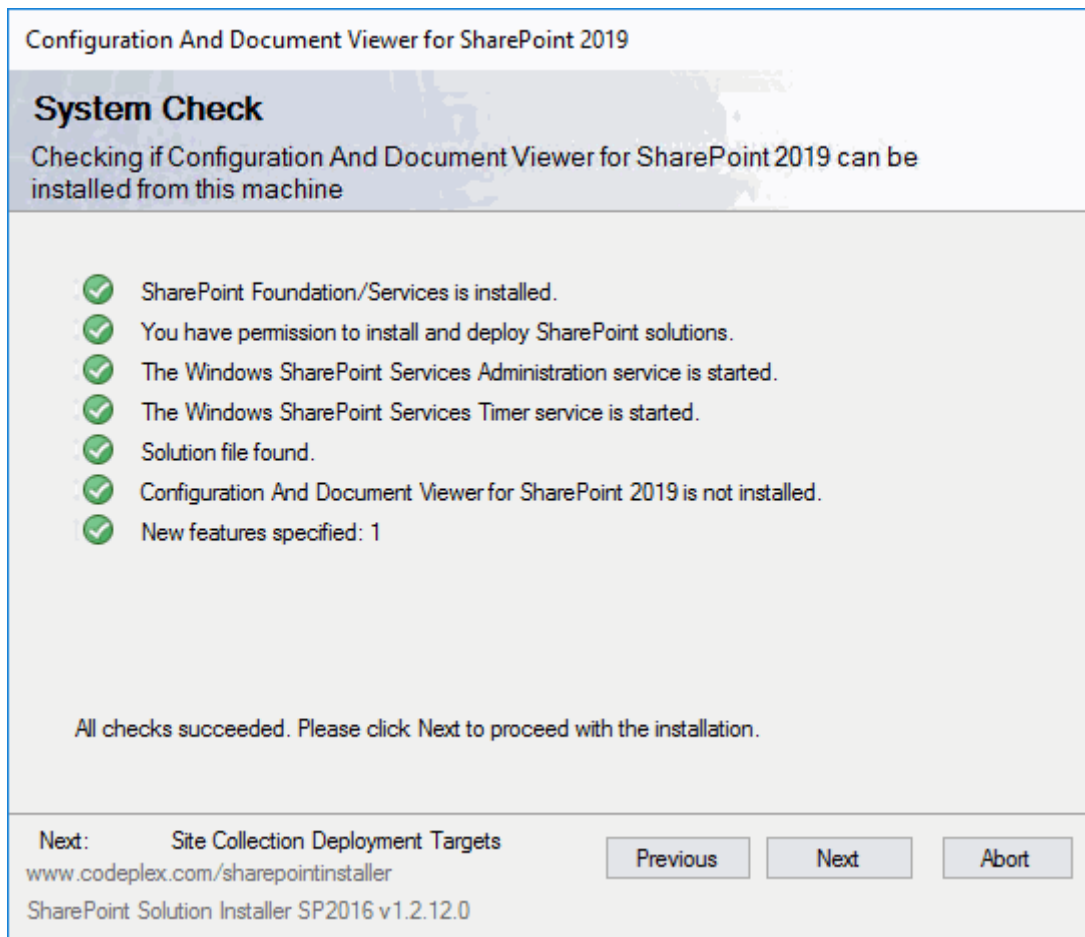
1. Double-click the Configuration **Setup2019.exe** in the **Configuration** folder of your installation source files.

If you have access to the Core Services build, the **Setup2019.exe** for SharePoint 2019 is located in the following directory: `..\install\SharePoint\SharePoint2019\Configuration`. The **Configuration And Document Viewer for SharePoint 2019** wizard is displayed.



2. Click **Next**. The **System Check** page is displayed.

3. A system check is performed to determine whether OnBase Configuration Management can be installed on the server.

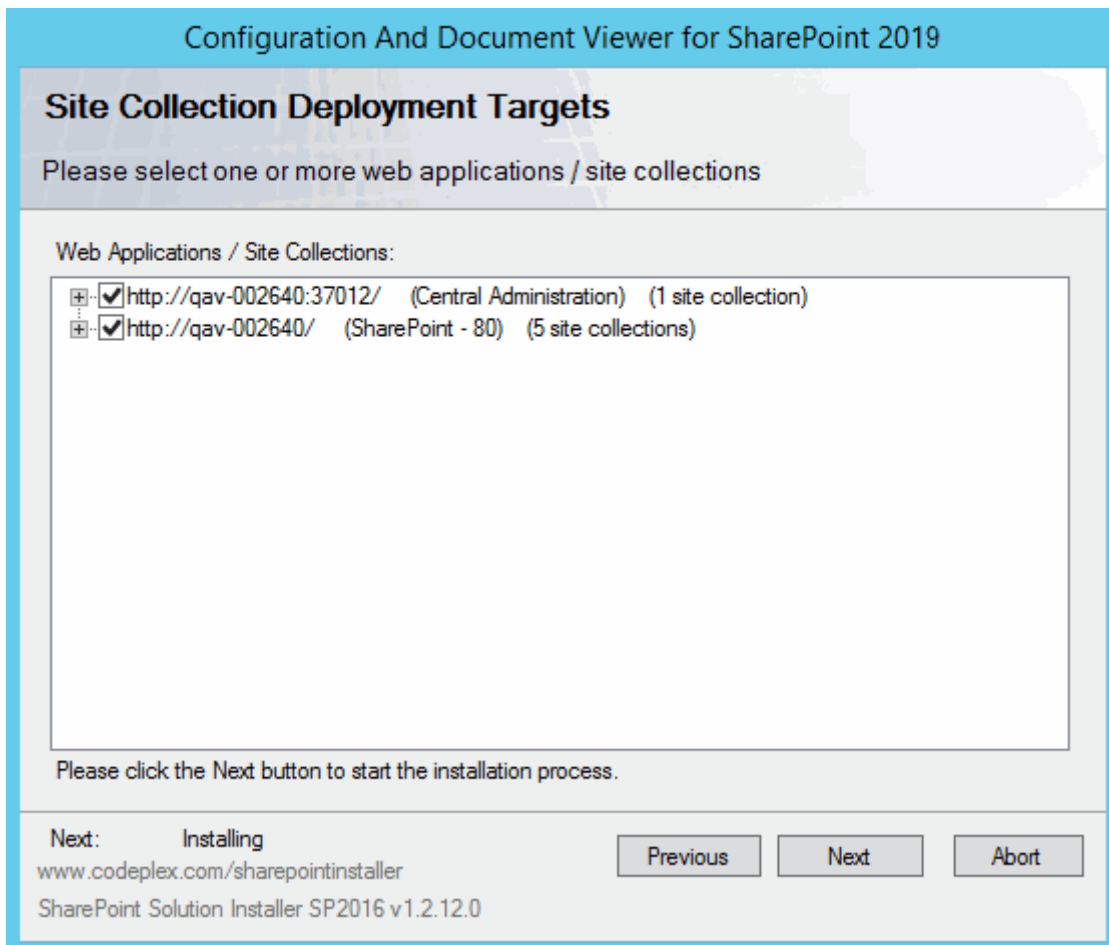


Depending on the results, do one of the following:

- If any of the checks fail, note which checks failed and click **Abort**. Address the failed requirements, and then restart the installation.

Note: On the **System Check** page, the term **solution file** refers to the **OnBaseConfiguration.wsp** file located in the same directory as the **Setup2019.exe** file.

- If the checks pass, click **Next**. The **Site Collection Deployment Targets** page is displayed.



4. Select only the Web applications where you want to deploy the integration. By default, all Web applications are selected.

Note: The Central Administration application cannot be deselected because OnBase Configuration Management is administered from this application.

5. Click **Next**. The installer distributes the files required to configure Content Connector for Microsoft SharePoint. The **Installation Successfully Completed** screen is displayed showing where the integration is deployed for each Web application.
6. Click **Close**.
7. Verify the installation in SharePoint 2019 Central Administration.
 - a. On the Central Administration homepage, click the gear button to display its menu.
 - b. Select **Site Settings**. The **Site Settings** page is displayed.

- c. Under **Site Collection Administration**, click **Site Collection Features**.

Note: To access **Site Collection Features**, you must be logged on as a site collection administrator.

- d. Your site collection should now include a feature named **OnBase Configuration Management**, and its status should be **Active**.



OnBase Configuration Management

Activating this feature will allow an administrator to configure OnBase Settings

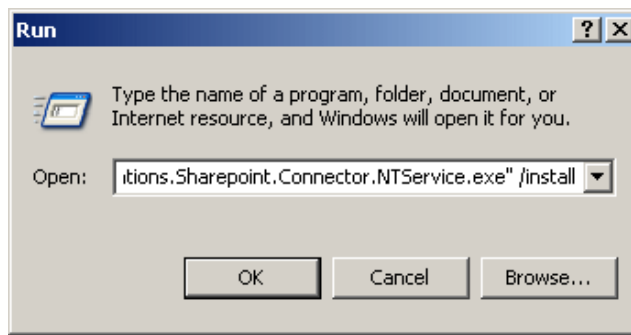
Installing the Content Connector Service (SharePoint 2019)

The Content Connector service checks for and uploads batches of OnBase documents to SharePoint. Install this service on a server where OnBase Configuration Management is installed, not a Web Front End (WFE) machine.

Note: The Content Connector does not work with Kerberos authentication. If the SharePoint site is set up for Kerberos authentication instead of NT, then the Content Connector cannot connect to the site.

1. Copy the **Content Connector** folder from your installation source files to the server. This folder is located in the following directory of the OnBase Core Services build:
`..\install\SharePoint\SharePoint 2019\Content Connector`
2. Open the **Hyland.Applications.Sharepoint.Connector.NTService.exe.config** file in a text editor.
3. Modify the following values:
 - **AppNetRoot** - Set to the **dmsVirtualRoot** of the OnBase Web Server.
 - **ProcessInterval** - Set to the interval, in milliseconds, that the Content Connector checks for new documents. The default value is **5000** milliseconds, or 5 seconds. Depending on your solution, you may want the Content Connector to check for and upload newly committed batches less frequently. When choosing an interval, keep in mind that lower intervals can reduce server performance.
 - **ServiceAccountUsername** - Set to the service account user name.
 - **ServiceAccountPassword** - Set to the service account password.
4. Save and close the file.
5. Open a **Run** dialog box by selecting **Start | Run**.
6. Delete any existing values from the **Open** field in the **Run** dialog box. By default, the **Open** field contains the name of the last file or folder you opened.
7. Drag the **Hyland.Applications.Sharepoint.Connector.NTService.exe** file from its copied location to the **Run** dialog box. Double-check to ensure you are using the .exe file.

8. After the end of the file name, add a space and type **/install**.



9. Click **OK**. The service is installed and available in the Windows Services console as **Hyland SharePoint Content Connector**.
10. Open the Services console by entering services.msc in a **Run** dialog box.
11. Double-click **Hyland SharePoint Content Connector**.
12. Click the **Log On** tab.
13. Select **This account**.
14. Enter the credentials of a domain user who has SharePoint **Contribute** permissions to the lists and libraries that the Content Connector needs to update. If the OnBase Web Server is not configured for anonymous access, then this user must also be a valid account that the IIS server running the Web Server can authenticate.

Note: If the Content Connector is configured to create list items, the user account entered here will be displayed as the items' creator in SharePoint.

15. Click **OK**.
16. Restart the **Hyland SharePoint Content Connector** service.

Modifying the Content Connector Service Configuration

You can modify the Content Connector service configuration file after the service is installed.

To modify the Content Connector service configuration file:

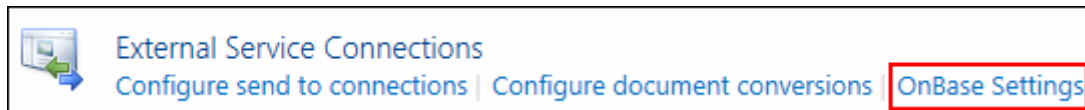
1. In the Windows Services console, stop the Hyland SharePoint Content Connector service.
2. Open the **Hyland.Applications.Sharepoint.Connector.NTService.exe.config** file in a text editor.
3. Modify the values as needed. See [Installing OnBase Configuration Management \(SharePoint 2019\) on page 22](#) for information on modifying these values.
4. Save and close the file.
5. Start the Hyland SharePoint Content Connector service.

Configuring General Settings: Web Server and Workflow (SharePoint 2019)

Before configuring Content Connector for Microsoft SharePoint, first provide the URL to the OnBase Web Server in Central Administration. Then, specify whether to include OnBase Workflow elements in the viewer that displays OnBase documents. Workflow elements include ad-hoc tasks, a work folder displaying related OnBase documents, and a status bar showing the life cycles and queues where the document resides.

To configure general settings:

1. Open SharePoint Central Administration.
2. Click **General Application Settings** from the left side of the page.
3. Under **External Service Connections**, click **OnBase Settings**.



The **General Settings** page is displayed.

4. In the **OnBase URL** field, type the URL of the OnBase Web Server. For example: `http://webserver03/AppNet`

 A screenshot of the 'OnBase Settings' configuration page. The page is divided into two columns. The left column contains labels and descriptions for various settings. The right column contains the corresponding input fields and checkboxes.

- OnBase URL:** A text input field for specifying the URL of the OnBase Web Server.
- Show Workflow in viewer:** A checkbox to specify if Workflow should be displayed in the OnBase viewer.
- Use ActiveX Viewer:** A checkbox to specify if ActiveX or HTML controls are used by the OnBase viewer.
- Install OnBase Initialization Timer Service:** A checkbox that is checked, with a description: 'Installing and activating this service will keep the application initialized across server recycles (optional)'.
- Document Pop Type:** A dropdown menu with options: DocPop, PDFPop, UnityPop, and AEPop. 'DocPop' is selected.
- Service Account:** Fields for 'Username' and 'Password' to specify the service account credentials to use.

 At the bottom right, there are 'OK' and 'Cancel' buttons.

5. Select additional options, if needed:

Option	Description
Show Workflow viewer	<p>Select this option to provide OnBase Workflow functionality in the OnBase viewer. For information about the Workflow viewer, see Workflow Viewer on page 71.</p> <hr/> <p>Note: When this option is selected, the OnBase URL specified here must use the same case as the dmsVirtualRoot value in the Web Server's Web.config. Otherwise, the viewer displays an error.</p> <hr/>
Use ActiveX Viewer	<p>Select this option to use the OnBase ActiveX viewer. Clear this option to use the OnBase HTML viewer.</p> <p>Use the HTML viewer in mixed browser environments or if users should not have the OnBase ActiveX controls installed on their workstations.</p> <p>Available features vary per viewer. See the OnBase Web Server module reference guide for differences between the ActiveX Web Client and HTML Web Client.</p>
Install OnBase Initialization Timer Service	<p>Select to install the OnBase Initialization Timer service, which checks the Web Server and Application Server every minute to determine whether they are initialized, or prepared to receive requests from the OnBase SharePoint integrations.</p> <p>If the Web Server and Application Server are not initialized (for example, because their application pools were recycled), then the service initializes them so that requests from the OnBase SharePoint integrations will be processed more quickly.</p> <p>If you choose not to use the service, then users may have to wait while the OnBase Web or Application Server initializes before their requests are processed.</p> <p>To uninstall the service, clear this option.</p>

Option	Description
Document Pop Type	<p>Specify the Pop Type to be used to display documents in the OnBase Viewer.</p> <p>Select DocPop to view documents in the default viewer.</p> <hr/> <p>Note: See the DocPop documentation for more information.</p> <hr/> <p>Select PDFPop to view documents in the web-based PDF viewer. All documents opened with PDFPop behave as PDFs.</p> <hr/> <p>Note: See the Web Client documentation for more information.</p> <hr/> <p>Select UnityPop to view documents in the Unity Client using UnityPop links.</p> <hr/> <p>Note: See the Unity Client documentation for more information. The Unity Client license is required to use this option.</p> <hr/> <p>Select AEPop to use Application Enabler Pop to view documents.</p> <hr/> <p>Note: See the Application Enabler documentation for more information. The Application Enabler license is required to use this option.</p> <hr/>
Service Account	<p>Specify the service account credentials to use.</p> <p>In the Username field, type the service account user name.</p> <p>In the Password field, type the service account password.</p> <hr/> <p>Note: The service account credentials are required.</p> <hr/>

6. Click **OK**. If you selected **Install OnBase Initialization Timer Service**, continue to the following section on enabling the initialization timer service.

Enabling the Initialization Timer Service

If you selected **Install OnBase Initialization Timer Service** under General Settings, then you must enable the service in Timer Job Definitions.

To enable the initialization timer service:

1. From Central Administration, click **Monitoring** from the left side of the page.
2. Under **Timer Jobs**, click **Review job definitions**.

- Click the **OnBase Initialize (Keep Alive) Job** link from the list. The **Edit Timer Job** page is displayed.

Job Title	OnBase Initialize (Keep Alive) Job	
Job Description		
Job Properties This section lists the properties for this job.	Web application:	
	Last run time:	N/A
Recurring Schedule Use this section to modify the schedule specifying when the timer job will run. Daily, weekly, and monthly schedules also include a window of execution. The timer service will pick a random time within this interval to begin executing the job on each applicable server. This feature is appropriate for high-load jobs which run on multiple servers on the farm. Running this type of job on all the servers simultaneously might place an unreasonable load on the farm. To specify an exact starting time, set the beginning and ending times of the interval to the same value.	This timer job is scheduled to run: <input checked="" type="radio"/> Minutes Every <input type="text" value="5"/> minute(s) <input type="radio"/> Hourly <input type="radio"/> Daily <input type="radio"/> Weekly <input type="radio"/> Monthly	
<div> <input type="button" value="Enable"/> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </div>		

- Click **Enable**.
- Click **OK**.

Applying Browser Settings for the Viewer (SharePoint 2019)

To use the OnBase viewer, Content Connector for Microsoft SharePoint requires the following security settings to be set to **Enable** for the Web Server's security zone in Internet Explorer:

- **Access data sources across domains**
- **Navigate sub-frames across different domains**

To change settings for the Web Server's security zone, select the zone from the **Security** tab and click **Custom Level**. The settings are in the **Miscellaneous** category.

Adding a Unique Icon for Archived Documents (SharePoint 2019)

When a document has been archived to OnBase and removed from the SharePoint database, the following icon can be displayed next to the document name.



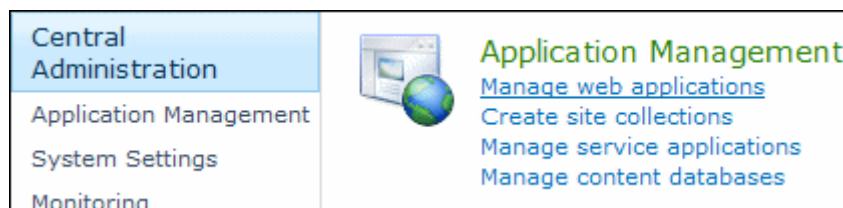
To have this icon displayed next to OnBase documents:

1. Open the DOCICON.xml file in a text editor. For SharePoint 2019, this file is located in the following directory:
C:\Program Files\Common Files\Microsoft Shared\web server extensions\16\TEMPLATE\XML
2. Under the **<ByExtension>** element, add the following text on one line:
<Mapping Key="obctx" Value="loclib16.GIF"
OpenControl="OnBase.OpenDocuments" />
3. Save the file.

Turning off Strict File Handling (SharePoint 2019)

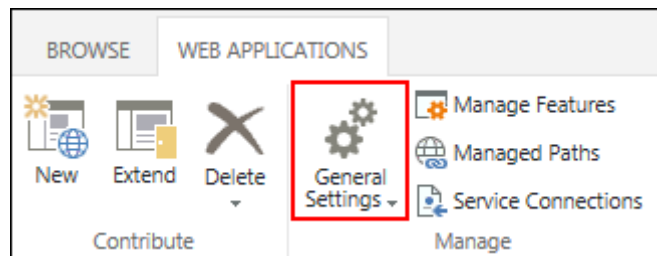
To allow the opening of documents in DocPop, the SharePoint application's Browser File Handling must be set to **Permissive**.

1. Open SharePoint Central Administration.
2. Click the **Manage web applications** link under **Application Management**.



3. Select the Web application where you installed Content Connector for Microsoft SharePoint.

- Click **General Settings** from the ribbon.



- Under **Browser File Handling**, select **Permissive**.
- Click **OK**.

Configuring the OnBase Application Server (SharePoint 2019)

The OnBase Application Server's web.config file must be modified to enable Content Connector for Microsoft SharePoint. These steps require you to have a Service Account configured in OnBase. For more information about Service Accounts, see the **System Administration** module reference guide.

Note: The Application Server's web.config file may have already been updated for another SharePoint integration. If the following settings are already configured, do not repeat this procedure.

- Locate the web.config file from the Application Server's virtual directory. In a default installation, the **web.config** file is located at **C:\inetpub\wwwroot\AppServer**.
- Find the `<Hyland.Applications.Sharepoint.Services>` element.
- Modify the **max** and **min** values for the **PoolSize** setting if needed. When many users are accessing the service, increasing these values allows for faster connections, but it also results in higher memory consumption on the server.
- Ensure the **ExpandKeysets** setting **value** is set to **true**. This setting enables the automatic population of Keyword Type fields based on an existing primary value.

Caution: If the **ExpandKeysets** setting **value** is set to **false**, AutoFill Keyword Sets won't be populated on documents archived using Archive Services or Ad-Hoc Scanning for Microsoft SharePoint.

- Save and close the web.config file.

Example

The following example illustrates the new web.config entries in context. The Application Server's web.config file contains configuration information for other OnBase services and modules, but this example displays information for only Content Connector for Microsoft SharePoint.

```
<configuration>
  <configSections>
    <section name="Hyland.Applications.Sharepoint.Services"
      type="Hyland.Applications.Sharepoint.Services.ConfigurationHandler
        ,Hyland.Applications.Sharepoint.Services" />
  </configSections>
  <Hyland.Applications.Sharepoint.Services>
    <PoolSize max="5" min="1" />
    <ExpandKeysets value="true" />
  </Hyland.Applications.Sharepoint.Services>
  ...
</configuration>
```

Configuring Optimization for Windows Authentication

If your Application Server is configured for Active Directory Enhanced, the Application Server must be configured to be optimized for Windows Authentication to use Content Connector for Microsoft SharePoint. This is configured using the Web Application Management Console. For more information on using the Web Application Management Console, see the **Web Application Management Console** documentation.

To configure optimization for Windows Authentication:

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

Configuring the OnBase Web Server (SharePoint 2019)

Because the OnBase viewer can use DocPop, the DocPop type specified on the **General Settings** page of SharePoint Central Administration must be configured in the OnBase Web Server's **Web.config** file to enable this option. This file resides in the Web Server's virtual directory (which is named **AppNet** in a default installation).

To configure the Web Server's **Web.config** file:

1. Locate the element corresponding to the DocPop type chosen in SharePoint Central Administration:

Document Pop Type	Element
DocPop	Hyland.Web.DocPop
PDFPop	Hyland.Web.PdfPop
UnityPop	Hyland.Web.FormPop
AEPop	Hyland.Web.FolderPop

2. Within the element, change the **datasource** value to the name of the ODBC data source configured on the Application Server.
3. Within the same element, change the **embedded** value to **true**.
4. Save the **Web.config** file.

Note: Additional settings are required for UnityPop and AEPop. For more information, see the Unity Client module reference guide.

Depending on your solution's configuration, additional DocPop settings may need to be configured to support Active Directory authentication. For more information about DocPop settings, see the **Web Server** documentation.

If your solution uses the ad-hoc archive method, ensure the OnBase database is configured for Active Directory authentication. OnBase uses the Active Directory credentials of the user logged on to the machine to evaluate the user's Document Type privileges during ad-hoc archival.

For ease of use, configure the OnBase Web Server for Active Directory authentication as described in the Installation chapter of the Web Server module reference guide. This configuration will make it easier to troubleshoot authentication, if necessary.

Note: In previous versions of OnBase, ad-hoc archival required the Web Server to be configured for OnBase's Integration for Single Sign-On. This is no longer a requirement, but the database must be configured for Active Directory authentication to allow ad-hoc archival.

Repair or Remove an Installation

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

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

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

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

Uninstalling the SharePoint Connector Service

The Windows Service for the Content Connector for Microsoft SharePoint can be uninstalled through command line.

To uninstall the Connector Service:

1. Open Command Prompt as Administrator
2. Enter **SC STOP Hyland.Applications.Sharepoint.Connector.NTService** to stop the service.
3. Enter **SC DELETE Hyland.Applications.Sharepoint.Connector.NTService** to delete the service.

Troubleshooting

The OnBase integrations for SharePoint display documents using DocPop, a component of the OnBase Web Server. When issues are encountered with OnBase documents in SharePoint, the cause may be related to Web Server configuration. Consult the Web Server module reference guide for comprehensive troubleshooting information.

Checking Verification Reports

When the Content Connector uploads documents to SharePoint, a verification report is automatically generated and stored in the **SYS Verification Reports** Document Type. Verification reports indicate which documents in the batch passed the configured rules and were uploaded successfully. Documents that failed to pass the configured rules have an upload status of **False**, indicating that they were not uploaded. Documents that passed the configured rules and were uploaded successfully have an upload status of **True**.

Document Types Are Not Available for Mapping

When you try to map Content Types to OnBase Document Types on a second physical SharePoint server instance, no Document Types are displayed for mapping in the OnBase Configuration screen.

A second instance of the SharePoint server could exist in a scenario where a primary instance of SharePoint exists on a physical server for users on a company intranet and a second instance is set up outside the perimeter network (also known as the DMZ, or demilitarized zone) for use by external users who need to access the same OnBase database.

OnBase does not support multiple physical SharePoint servers for the Content Connector, Archive Services, or Ad-Hoc Scanning integration, because the identity of the SharePoint server is stored in a column within the OnBase database. Configuring these integrations using the OnBase SharePoint Configuration module from a second SharePoint server instance could overwrite the information regarding the primary server and disable the initial integration.

System.Net.WebException: HTTP status 401: Unauthorized

When the SharePoint Content Connector service attempts to upload a batch of documents, the following error may be logged to the verification report:

```
An exception occurred that prevented the batch from being processed:  
System.Net.WebException: The request failed with HTTP status 401: Unauthorized.
```

This error indicates that the account running the Content Connector service has insufficient permissions.

Ensure the service is running as a domain user who has SharePoint **Contribute** permissions to the lists and libraries that the Content Connector needs to update. If the OnBase Web Server is not configured for anonymous access, then this user must also be a valid account that the IIS server running the Web Server can authenticate.

For more information about the Content Connector service, see [Installing the Content Connector Service \(SharePoint 2016\) on page 11](#).

For more information about the Content Connector service, see [Installing the Content Connector Service \(SharePoint 2019\) on page 25](#).

Viewer Error: An error occurred while loading Workflow

When a user opens a document, the OnBase viewer may display the following error:

- An error occurred while loading Workflow.

When this occurs, the following error is logged to the Diagnostics Console:

- Generic Viewer Control could not obtain required Property - SessionId

These errors occur when the **Show Workflow viewer** option is selected in Central Administration, but the **OnBase URL** provided does not exactly match the **dmsVirtualRoot** value in the Web Server's web.config.

To address this issue, access OnBase Settings in Central Administration. Verify that the **OnBase URL** exactly matches the value provided for **dmsVirtualRoot** in the Web Server's web.config. Even the cases must match.

For configuration information, see [Configuring General Settings: Web Server and Workflow \(SharePoint 2016\) on page 13](#).

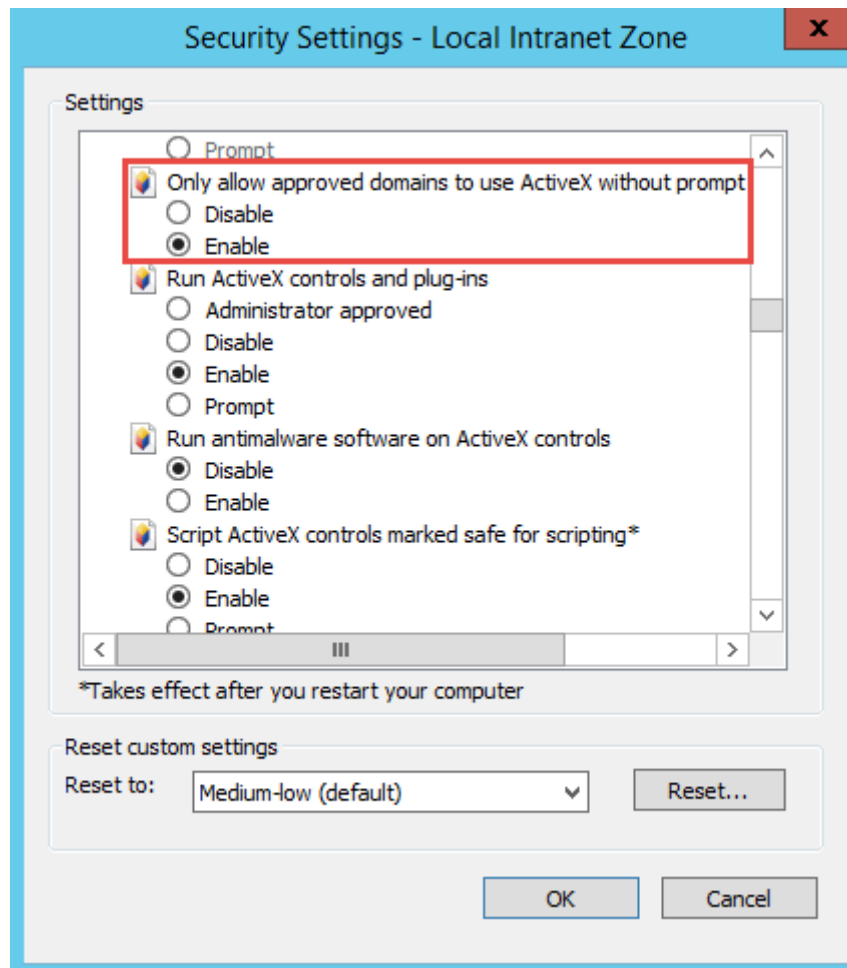
For configuration information, see [Configuring General Settings: Web Server and Workflow \(SharePoint 2019\) on page 27](#).

ActiveX Controls Fail to Load

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

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

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



Solution — To ensure that ActiveX controls can load properly, preset the allowed OnBase ActiveX controls and the associated sites in the registry as described in “Per-Site ActiveX Controls,” available at the following location:

[http://msdn.microsoft.com/en-us/library/dd433050\(VS.85\).aspx#_itpro](http://msdn.microsoft.com/en-us/library/dd433050(VS.85).aspx#_itpro)

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

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

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

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

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

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

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

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

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

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

The position shift may occur in the following instances:

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

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

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

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

A position shift can be corrected through the following methods:

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

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

Contacting Support

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

- The OnBase module where the issue was encountered.
- The OnBase version and build.
- The type and version of the connected database, such as Microsoft SQL Server 2014 or Oracle 12c, and any Service Pack that has been installed.
- The operating system that the workstation is running on, such as Windows 10 or Windows Server 2012 R2, and any Service Pack that has been installed. Check the supported operating systems for this module to ensure that the operating system is supported.

- The name and version of any application related to the issue.
- The version of Internet Explorer and any Service Pack that has been installed, if applicable.
- A complete description of the problem, including actions leading up to the issue.
- Screenshots of any error messages.

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



Content Connector for Microsoft SharePoint

Administration Guide

Overview

Content Connector is configured both within OnBase Configuration and SharePoint.

Before you begin, read [Planning Your Configuration on page 43](#). Then, continue to the following:

- [OnBase Configuration on page 44](#)
- [SharePoint Configuration on page 51](#)

Planning Your Configuration

Because OnBase configuration is tightly integrated with SharePoint configuration, you should configure your SharePoint solution with OnBase in mind.

OnBase Document Types and Keyword Types can be mapped to SharePoint content types and columns at different levels of the SharePoint site hierarchy. Mappings applied at higher levels are inherited by content types and columns at lower levels. Content Connector for Microsoft SharePoint accommodates the following mapping schemes:

- Content types can be mapped to OnBase Document Types at the site collection level. These mappings are then inherited by every instance of the content types at lower site levels.
- Content types can be mapped to OnBase Document Types at every instance of a list or document library within your site.
- Content types can be mapped at the site collection level and then overridden by individual lists or document libraries.

Document Type mappings configured at higher levels can be overridden at lower levels, but the Keyword Type mappings cannot. Although you cannot break the inheritance of Keyword Types, you can work around it. For example, if you mapped a Document Type and Keyword Type at the top-level site, you can map a different Document Type that has different Keyword Types at the document library or list level. Similarly, you can create custom content types and columns in SharePoint, and then map these to different Document Types and Keyword Types.

Note: Multi-Instance Keyword Type Groups (MIKG) are not supported in Content Connector for Microsoft SharePoint.

OnBase Configuration Overview

The following procedures must be completed within OnBase Configuration:

1. Configure any scan queues for documents that you want to expose through SharePoint. See the Document Imaging help for configuration information.
2. Configure any DIP and COLD processes for documents that you want to expose through SharePoint. See the DIP and COLD help files for configuration information.
3. Add the scan queues and batch processes to a Batch Application, which is a container for the processes you want to enable for the Content Connector. See [Creating Batch Applications on page 45](#).

SharePoint Configuration Overview

The following procedures must be completed within SharePoint:

1. Allow management of content types. See [Allowing Management of Content Types on Libraries and Lists on page 52](#).
2. Map OnBase Document Types and Keyword Types to SharePoint content types and column types. See [Mapping Content Types and Columns on page 53](#).
3. Configure batch processing on the content types. See [Configuring Batch Processing for a Document Library or Item List on page 60](#).

OnBase Configuration

In OnBase Configuration, you must configure the batch processes that are used to import documents into OnBase as well as the Batch Applications that are used to upload those documents to SharePoint. For batch process configuration information, see the help file for the batch process. For Batch Application configuration information, see the following topic.

Note: When configuring Auto-Names and Keyword Types, be aware that certain characters cannot be included in SharePoint file or folder names. See [Invalid Characters on page 51](#).

Creating Batch Applications

Batch Applications let you expose OnBase batch-processed documents through SharePoint as item list attachments and document library items. Batch Applications are assigned to SharePoint content types at the document library or list level. A Batch Application can be assigned to only one content type in one document library or list. If you need documents scanned or processed into OnBase to be uploaded to multiple libraries or lists, you can configure additional Batch Applications using the same scan queue or import process.

When documents from any processing module (such as COLD, DIP, etc.) have been committed, the committed documents can then be routed to a Batch Application queue for further processing.

Note: Documents belonging to the **System** Document Type Group in the committed batch (i.e., the Verification Report) are not routed to the Batch Application queue.

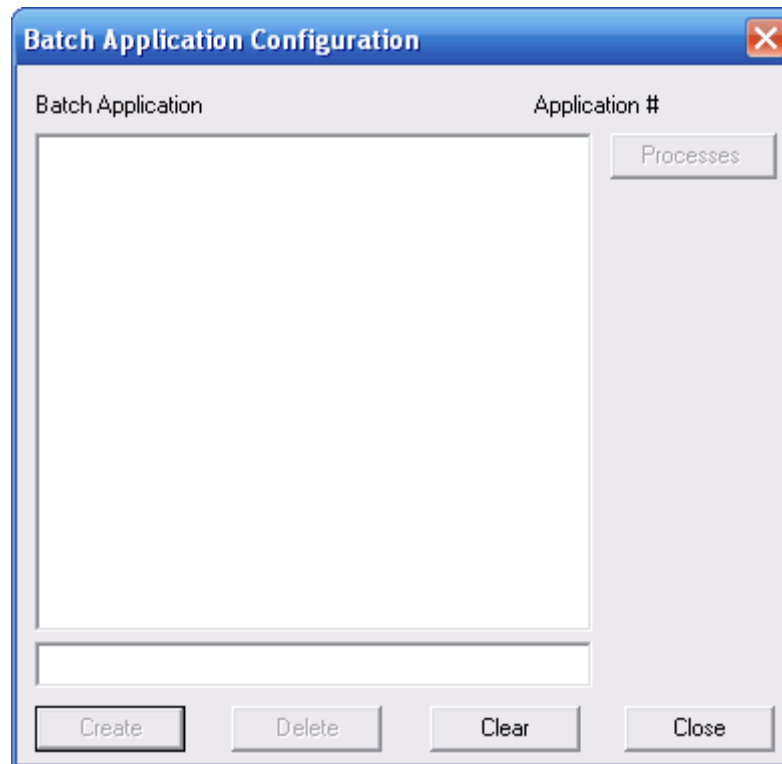
Each Batch Application is configured with Batch Application Processes that contain one or more of the processing module's configured queues. For example, a Batch Application may be configured with a Batch Application Process that contains a COLD queue, two DIP queues, and a Document Imaging scan queue. Once the documents in those queues are committed, they will then be routed to the Batch Application queue. The documents do not need to be committed at the same time to be successfully routed to the Batch Application queue.

Configuring Batch Level Application Queues

Note: Batch Application queues are only available when the **Process Configuration** right is granted.

To configure a Batch Application queue:

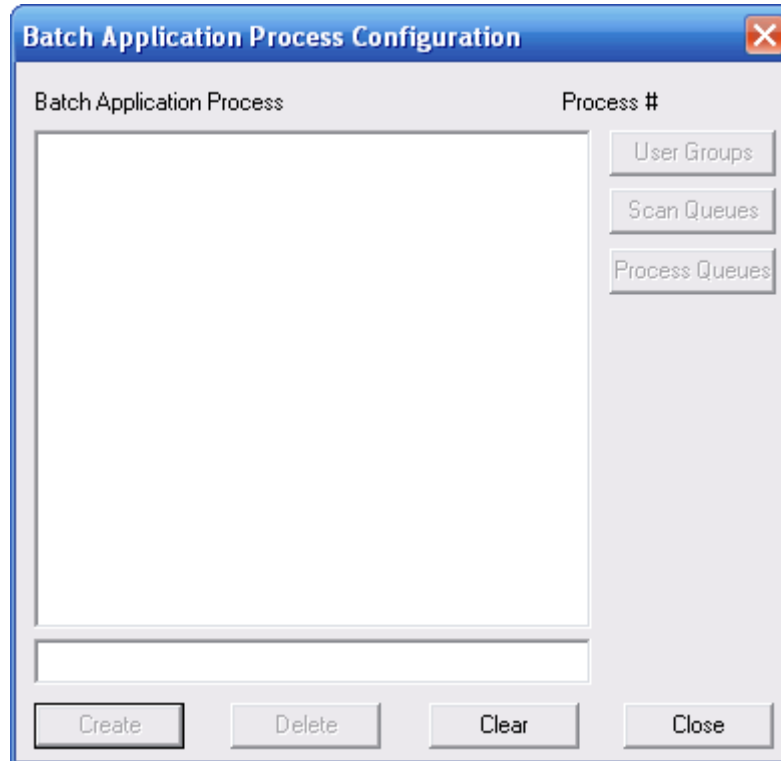
1. In the Configuration module, select **Import | Batch Applications**. The **Batch Application Configuration** dialog box is displayed.



2. Place your cursor in the data entry field and enter an appropriate name for the Batch Application. When finished, click **Create**. The name of the Batch Application will be displayed in the **Batch Application** list.

- Click the **Processes** button. The **Batch Application Process Configuration** dialog box is displayed.

Note: If multiple Batch Applications have already been configured, select the application you wish to configure a Batch Application Process for, then click the **Processes** button.

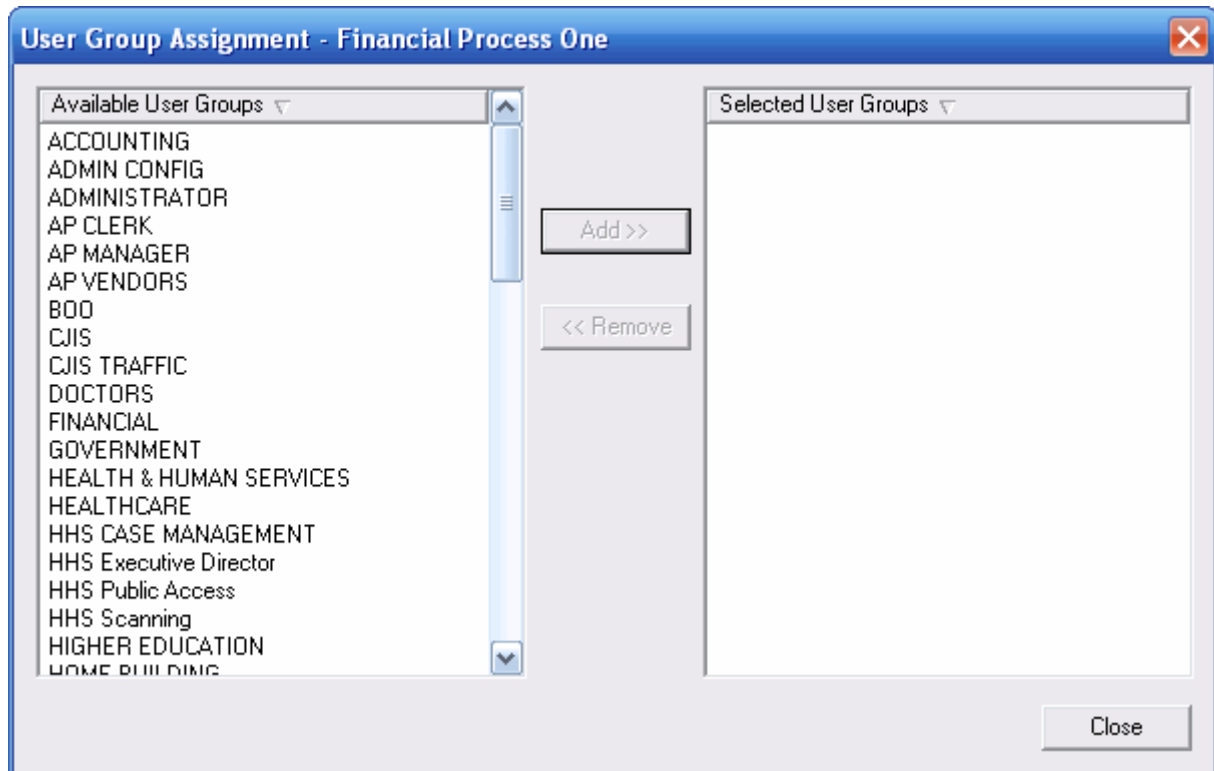


- Place your cursor in the data entry field and enter an appropriate name for the Batch Application Process. When finished, click **Create**. The name of the Batch Application Process will be displayed in the **Batch Application Process** list.
As soon as a Batch Application Process is created, the following buttons are enabled and must be configured appropriately:
 - User Groups. See [Configuring User Groups on page 48](#).
 - Scan Queues. See [Configuring Scan Queues on page 49](#).
 - Process Queues. See [Configuring Process Queues on page 50](#).
- When finished configuring the Batch Application Process, click **Close** to exit the dialog box.

Configuring User Groups

You must grant the appropriate user groups access to the Batch Application Process. These are the users who need to view or administer the process itself, not the users who need to view the documents imported by the Batch Application Process. To assign user group privileges:

1. In the **Batch Application Process** dialog box, click **User Groups**. The **User Group Assignment - [Batch Application Process Name]** dialog box is displayed.



2. Select the user group(s) that should have access to the Batch Application Process from the **Available User Groups** list. Double-click the user group or click the **Add>>** button to add the user group to the **Selected User Groups** list.

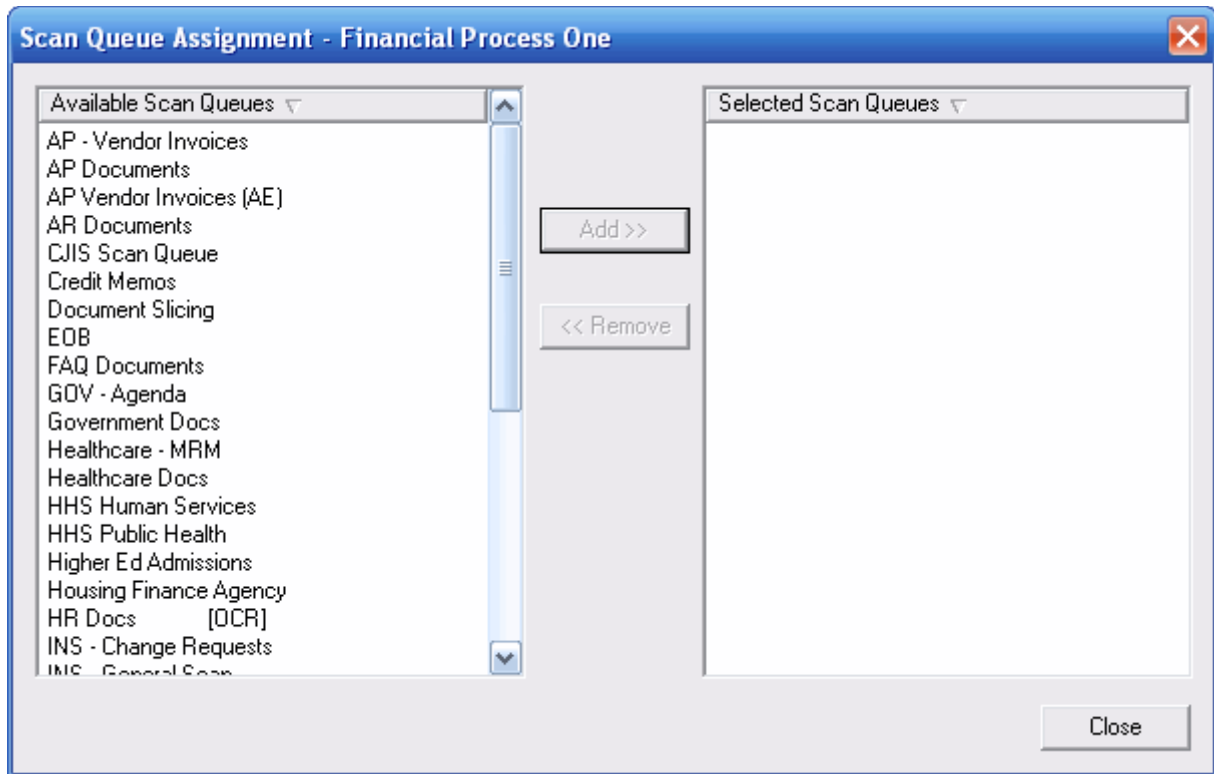
Tip: Click **Available User Groups** to sort the list alphabetically.

3. When finished, click the **Close** button to exit the dialog box.

Configuring Scan Queues

A Batch Application Process can be configured to route documents out of one or multiple Document Imaging scan queues. To configure scan queues for a Batch Application Process:

1. In the **Batch Application Process** dialog box, click **Scan Queues**. The **Scan Queue Assignment - [Batch Application Process Name]** dialog box is displayed.



2. Select the scan queues that will belong to the Batch Application Process from the **Available Scan Queues** list. Double-click the scan queue or click the **Add>>** button to add the scan queue to the **Selected Scan Queues** list. Any time a batch is committed from any of the added queues, a new batch is added to the Batch Application queue.

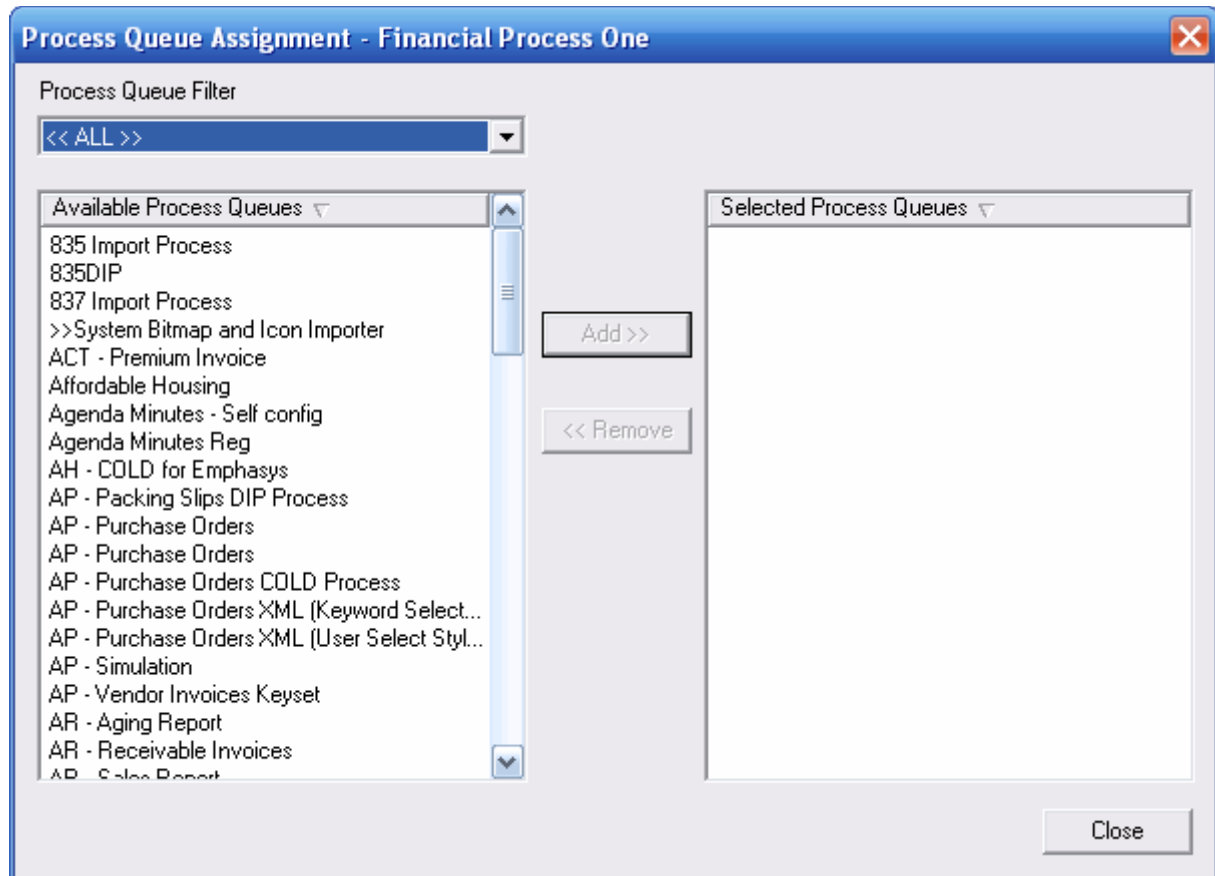
Tip: Click **Available Scan Queues** to sort the list alphabetically.

3. When finished, click the **Close** button to exit the dialog box.

Configuring Process Queues

A Batch Application Process can be configured to route documents out of one or more processing module queues. To configure queues for a Batch Application Process:

1. In the **Batch Application Process** dialog box, click **Process Queues**. The **Process Queue Assignment - [Batch Application Process Name]** dialog box is displayed.



2. To filter the **Available Process Queues** list by available process types (all COLD processes, all DIP processes, etc.), select the appropriate process type from the **Process Queue Filter** drop-down list. All processes that are licensed and have queues configured will be displayed in the list.
3. Select the process queues that will belong to the Batch Application Process from the **Available Process Queues** list. Double-click the process queue or click the **Add>>** button to add the process queue to the **Selected Process Queues** list. Any time a batch is committed from any of the added queues, a new batch is added to the Batch Application queue.

Tip: Click **Available Process Queues** to sort the list alphabetically.

4. When finished, click the **Close** button to exit the dialog box.

Invalid Characters

When OnBase documents are exposed through SharePoint, they can automatically create folders within document libraries. Certain characters cannot be used to name folders. If you set up Content Connector to create folders, ensure that the values used to name new folders will not contain invalid characters. The following characters cannot be included in a SharePoint file or folder name:

- tilde (~)
- number sign (#)
- percent (%)
- ampersand (&)
- asterisk (*)
- braces ({ })
- backslash (\)
- colon (:)
- angle brackets (< >)
- question mark (?)
- slash (/)
- pipe (|)
- quotation mark (")

Also, file or folder names cannot begin or end with a period, and periods cannot be used consecutively in the middle of a file or folder name.

SharePoint Configuration

Once you've configured Batch Applications in OnBase, you can configure the Content Connector to expose batch documents within SharePoint.

Because configuration in SharePoint takes place at the content type level, you must ensure content types can be managed on the document library or list where you are exposing OnBase documents. Once content types are exposed, you can begin mapping OnBase Document Types and Keyword Types to SharePoint content types and column types.

Finally, you must configure the batch processing behavior for the document libraries or lists where OnBase documents will be exposed.

Complete the following tasks:

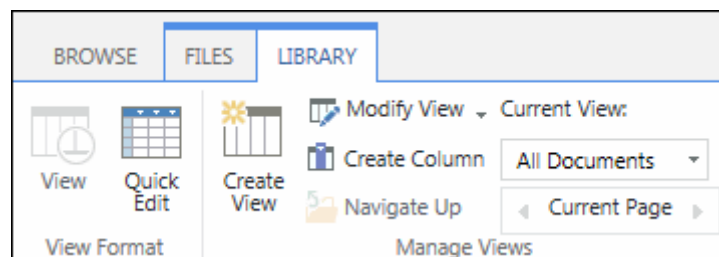
- [Allowing Management of Content Types on Libraries and Lists on page 52](#)
- [Mapping Content Types and Columns on page 53](#)
- [Configuring Batch Processing for a Document Library or Item List on page 60](#)

Allowing Management of Content Types on Libraries and Lists

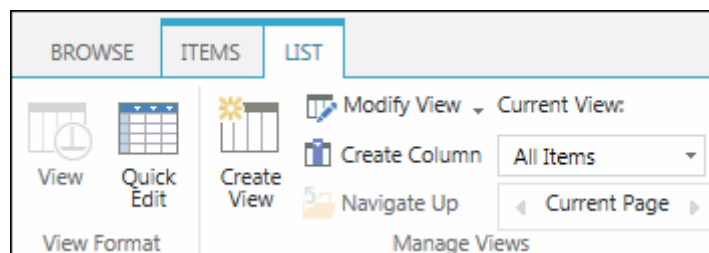
Content Connector for Microsoft SharePoint is configured through content types on a document library or list. By default, SharePoint doesn't allow you to manage content types from the Document Library Settings or List Settings screen.

To allow management of content types in SharePoint 2016 and SharePoint 2019:

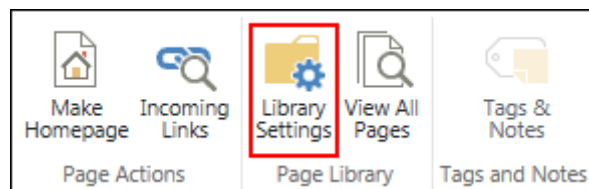
1. Open the document library or list that you want to configure.
2. Open the ribbon for the library or list.
 - Click the **Library** tab.



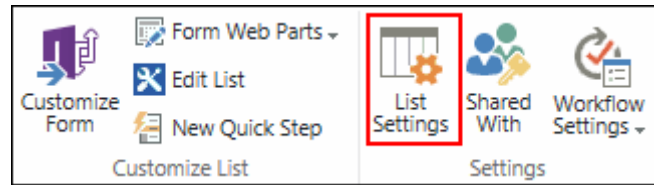
- Click the **List** tab.



3. Access the library or list's settings.
 - From the right side of the ribbon, click **Library Settings**.



- From the right side of the ribbon, click **List Settings**.



4. Under **General Settings**, click **Advanced Settings**.
5. Under **Allow management of content types?** at the top of the screen, click **Yes**.

<p>Content Types</p> <p>Specify whether to allow the management of content types on this document library. Each content type will appear on the new button and can have a unique set of columns, workflows and other behaviors.</p>	<p>Allow management of content types?</p> <p><input checked="" type="radio"/> Yes <input type="radio"/> No</p>
--	--

6. Click **OK** to save the change. The settings page now contains a **Content Types** section. Continue to the following procedure, [Mapping Content Types and Columns](#).

Mapping Content Types and Columns

Content Connector for Microsoft SharePoint lets you map content types and columns in SharePoint to Document Types and Keyword Types in OnBase. These mappings are required for several OnBase SharePoint integrations. How they are used depends on the integration.

- Archive Services for Microsoft SharePoint uses content type mappings to determine the OnBase Document Type into which documents are archived from SharePoint. Column mappings are used to populate OnBase Keyword values with existing SharePoint column data.
- Ad-Hoc Scanning for Microsoft SharePoint uses content type mappings to determine the Document Type into which new documents are being scanned. Column mappings are used to provide the default OnBase Keyword values during indexing. Be sure to configure mapping for each content type in a library.
- Content Connector for Microsoft SharePoint uses content type mappings to assign the correct content types to OnBase documents exposed through SharePoint. Column mappings are used to populate the documents' SharePoint columns with OnBase Keyword values and to match the documents to any corresponding SharePoint components, such as library folders or list items.

Mapping & Inheritance

SharePoint content types and columns share a one-to-one relationship with OnBase Document Types and Keyword Types, so mappings configured at the SharePoint site level are inherited by any child sites.

For example, if you create content type B and base it on content type A, any columns that content type B shares with content type A automatically inherit their column mappings from content type A. If content type C is a child of content type B, then it automatically inherits column mappings from both content types A and B.

If you have configured any mappings at the site level, you can override them by mapping different Document Types at a child level. However, column-to-Keyword Type mappings cannot be overridden. To map different Keyword Types at a child level, do either of the following:

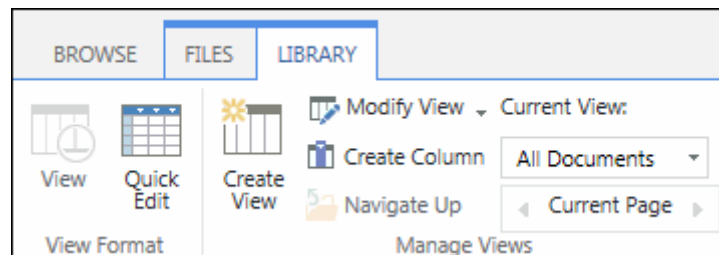
- In SharePoint, create a new content type with new columns to map to OnBase Keyword Types.
- In OnBase, create a new Document Type with new Keyword Types. Override the inherited mapping with the new Document Type.

See the SharePoint help for information about creating new content types and columns.

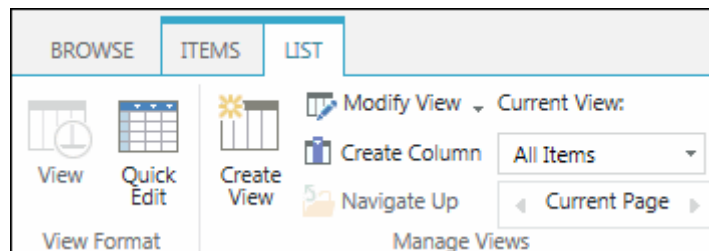
Mapping Document and Keyword Types

The following steps describe how to access OnBase configuration for a content type in SharePoint 2016 and SharePoint 2019.

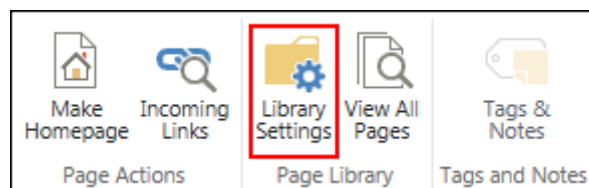
1. Open the document library or list that you want to configure.
2. Open the ribbon for the library or list.
 - Click the **Library** tab.



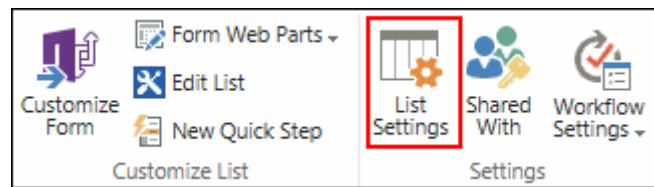
- Click the **List** tab.



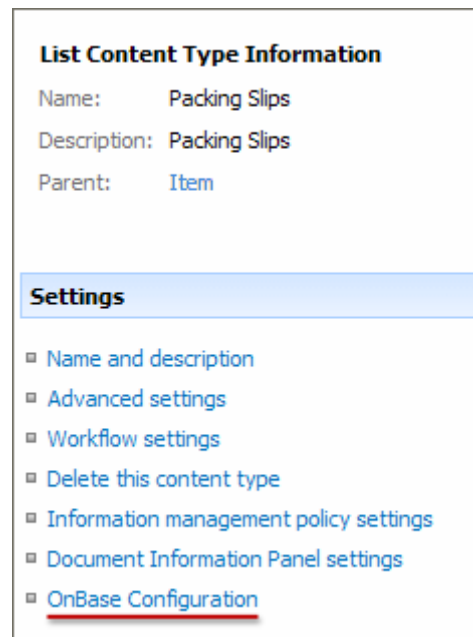
3. Access the library or list's settings.
 - From the right side of the ribbon, click **Library Settings**.



- From the right side of the ribbon, click **List Settings**.



4. From the **Content Types** section, click the content type that you want to configure for OnBase. If you do not see a **Content Types** section, complete [Allowing Management of Content Types on Libraries and Lists](#) on page 52.
5. Under **Settings**, click **OnBase Configuration**.



The **OnBase Configuration** screen is displayed.

6. Under **Settings**, click **Content Type Mappings**. Additional settings may be available depending on the OnBase SharePoint integrations included in your solution.

List Content Type Information

Name: Packing Slips

Description: Packing Slips

Parent: Item

Settings

- ▣ [Content Type Mappings](#)
- ▣ [Archive Services](#)
- ▣ [Batch Processing](#)
- ▣ [Delete this configuration](#)

The **Content Type Mappings** screen is displayed.

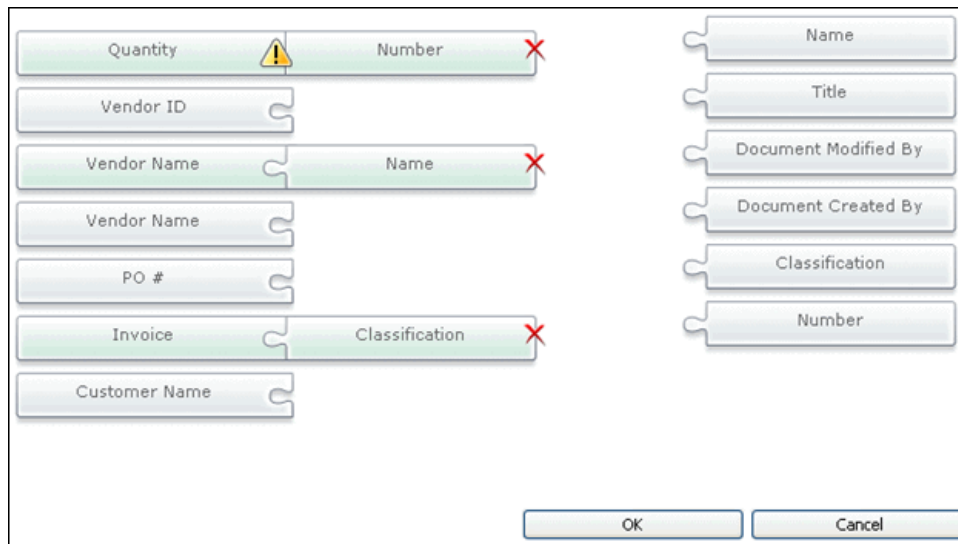
7. From the **Document Type** drop-down list, select the OnBase Document Type to map to the current content type.

Document Type Specify the Document Type to use for this Content Type	Document Type <input data-bbox="821 1018 1244 1045" type="text" value=" << Select Document Type >> "/>
Keyword Mappings Map Content Type Columns to OnBase Keywords	<input type="checkbox"/> Show Hidden SharePoint Fields

The **OnBase Keyword Types** list is dynamically populated based on the Document Type you select.

8. To display any hidden SharePoint columns, select **Show Hidden SharePoint Fields**.

9. Under **Keyword Mappings**, drag the SharePoint column to its corresponding OnBase Keyword Type.



- To create multiple instances of a Keyword Type, click the **Add Keyword** button on the left side of the Keyword Type. This button is displayed when you rest your pointer over a mapping.



- To remove a mapping, click the **Delete** button on its right side.



Tip: To display more information about a SharePoint column or OnBase Keyword Type, rest your pointer over its name.

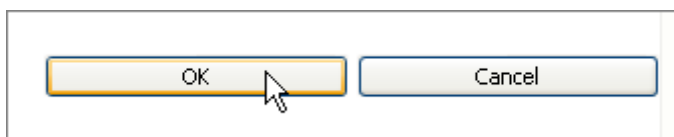
10. Review your mappings to ensure they are compatible. For information about compatibility, see the following topics:
 - [Mapping Symbols on page 58](#)
 - [Compatible Data Types on page 59](#)
 - [Mapping Document Authors & Editors on page 60](#)

- [Required Keyword Types on page 60](#)

Caution: If you map fields with incompatible data types, documents may be archived without a value for the incompatible Keyword Type. In Archive Services, the Keyword Type will only have a value if a user supplies one through the interactive archive method. The Keyword Type won't have a value if documents are archived through the scheduled or event-driven methods. The Ad-Hoc Scanning module addresses incompatible Keyword Types by preventing the user from uploading a document without first correcting the Keyword value.



Caution: If the SharePoint column value has more characters than the mapped Keyword Type allows, the value will be truncated on the document archived to OnBase. In Archive Services, this behavior varies depending on the archive method. See the Archive Methods topic for more information.



11. Click **OK** to save your changes.



Mapping Symbols

When you map columns to Keyword Types, different symbols and annotations may be displayed. To view specific information about a symbol, rest your pointer on it. Symbols are described in more detail in the following table:

Symbol	Description
	A lock indicates that the mapping was inherited from another content type and cannot be changed. Mappings are inherited from every parent in the content type hierarchy. To remove locked mappings, you must remove the mappings from the parent
	A chain of links indicates that the current mapping is required for a current configuration. For example, the Content Connector may be using the mapping to match documents to list items.

Symbol	Description
	<p>This symbol is displayed under either of the following conditions:</p> <ul style="list-style-type: none"> The SharePoint column and OnBase Keyword Type have different data types, but the mapping may be possible for certain values. For example, indexing OnBase Numeric Keyword Types with a SharePoint Text column type is possible if the column value is a number, but not if the column value uses alpha characters. The SharePoint column and OnBase Keyword Type have different maximum lengths, which may result in truncation of the Keyword value on the archived document. <p>You can change OnBase Keyword Types' maximum lengths in the Keyword Type Settings dialog box in the Configuration module. For more information about Keyword Type settings, see the Configuration module help files.</p>
	<p>This symbol indicates that the SharePoint column and OnBase Keyword Type have incompatible data types; the Keyword Type cannot have the SharePoint column value as a Keyword value.</p> <p>For example, a SharePoint Boolean column cannot be mapped to OnBase DateTime Keyword Types, because DateTime values must follow a specific format.</p>

Compatible Data Types

Fields with compatible data types can always be successfully mapped. Some data types may be compatible depending on an indexing value's format, but the mapping will trigger a Mapping Alert. The following table displays compatible data types.

OnBase Data Type	Compatible SharePoint Data Type
Alphanumeric	<p>Any SharePoint data type</p> <p>A SharePoint column type of Choice, MultiChoice, or Lookup can contain multiple values. If a column type containing multiple values is mapped to a Keyword Type, documents are indexed with each value in the column. A separate instance of the Keyword Type is created for each value.</p>
Currency / Float	Counter
	Currency
	Integer
	MaxItems
	ModStat
	Number

OnBase Data Type	Compatible SharePoint Data Type
Date / DateTime	DateTime
Numeric	Counter
	Integer
	MaxItems
	ModStat

Mapping Document Authors & Editors

To record the user who created or edited a document, you can map OnBase Keyword Types to the **Document Created By** and **Document Modified By** SharePoint column types.

Note: SharePoint column types configured for multiple user names are not supported. If a SharePoint column type is configured for multiple user names, then only the first user name is captured.

Required Keyword Types

If a mapped Document Type has any required Keyword Types, they are displayed in red. A required Keyword Type must be assigned a value before a document can be archived. You must map these Keyword Types to SharePoint columns.

To ensure that documents archived to OnBase always have values for required Keyword Types, apply the **Required (Must contain information)** setting to the mapped SharePoint columns. See the Microsoft SharePoint help files for information about making a column required for a content type.

Configuring Batch Processing for a Document Library or Item List

Batch processing configuration lets you control how OnBase documents are exposed through document libraries or item lists.

A single batch process can be assigned to only a single content type in only one document library or list. If you need documents scanned or processed into OnBase to be uploaded to multiple libraries or lists, you can configure additional Batch Applications using the same scan queue or import process. To configure Batch Applications, see [Creating Batch Applications on page 45](#).

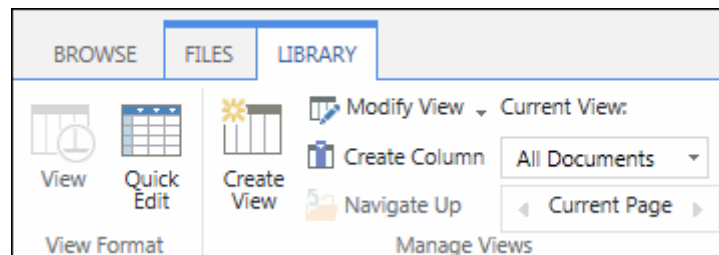
To configure batch processing, complete the following procedures:

- [Enabling a Batch Process for a Library or List on page 61](#)
- [Creating Rules on page 64](#)
- **For document libraries:** [Configuring Document Library Options on page 65](#)
For item lists: [Configuring List Options on page 67](#)

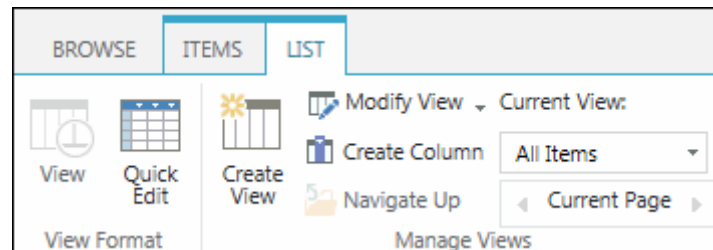
Enabling a Batch Process for a Library or List

To enable batch process configuration in SharePoint 2016 and SharePoint 2019:

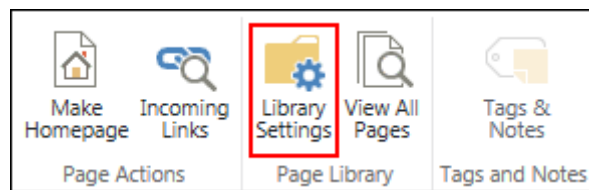
1. Open the document library or list that you want to configure.
 - Click the **Library** tab.



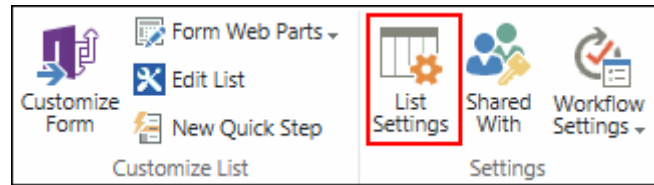
- Click the **List** tab.



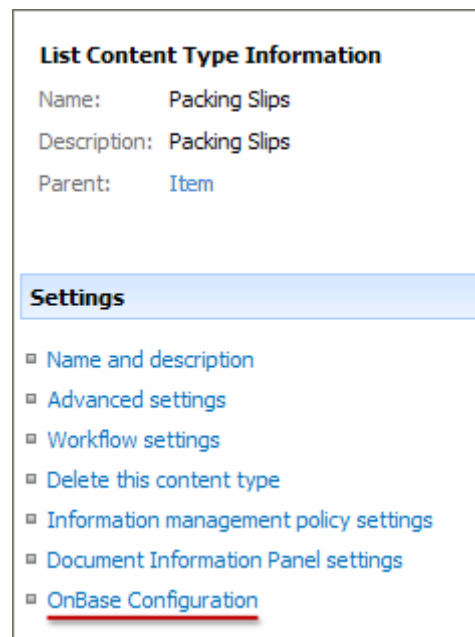
2. Access the library or list's settings.
 - From the right side of the ribbon, click **Library Settings**.



- From the right side of the ribbon, click **List Settings**.



3. From the **Content Types** section, click the content type you want to configure for OnBase. If you do not see a **Content Types** section, complete [Allowing Management of Content Types on Libraries and Lists](#) on page 52.
4. Under **Settings**, click **OnBase Configuration**.



The **OnBase Configuration** screen is displayed.

- Under **Settings**, click **Batch Processing**. Additional settings may be available depending on the OnBase SharePoint integrations included in your solution.

List Content Type Information

Name: Packing Slips
 Description: Packing Slips
 Parent: Item

Settings

- [Content Type Mappings](#)
- [Archive Services](#)
- [Batch Processing](#)
- [Delete this configuration](#)

When you access batch process configuration for a content type, the **Batch Process Gallery** screen displays all available batch processes organized by Batch Application. If any of the processes are enabled on the content type, a check mark is displayed in the **Enabled** column next to the process's name.

Use this page to configure Batch Processing.

Show Application: All Applications	
Batch Process	Enabled
AP - Packing Slips	
AP - Packing Slips Library	
AP - Packing Slips List	✓
AP - Vendor Invoices	
Invoices	
HR Import Processor	
HR Files	

If any of the processes are locked, then they are already associated with a document library content type or list content type. Only one content type in one document library or list can be assigned to each batch process.

6. Click the batch process you want to enable for the current library or list.
 - If the content type has been configured, the next screen displays batch process options.
 - If the content type has not yet been configured, an error screen is displayed. Click **This Content Type is not yet configured** from the error screen, and then map the content type and column types as described in the previous procedure, [Mapping Content Types and Columns on page 53](#).
7. Select the **Enabled** option to enable batch processing on this content type for this library or list.

Enabled
☒ Enabled

Specifies whether this process is enabled.

Note: If you disable a batch process, the batch process remains configured and cannot be assigned to another library or list. To make the batch process available to other libraries and lists, click the **Delete** button at the bottom of the screen.

8. Proceed to the following topics:
 - [Creating Rules on page 64](#)
 - [Configuring Document Library Options on page 65](#) (if you are configuring a document library)
 - [Configuring List Options on page 67](#) (if you are configuring a list)

Creating Rules

Rules are criteria that documents must meet to qualify for uploading. Rules let you filter out documents based on Keyword values. You can configure multiple rules. If a document doesn't satisfy all rules, then the document is not uploaded to SharePoint.

1. From the **Rules** drop-down list, select the OnBase Keyword Type that will form the basis for the rule.
2. If you selected a numeric column type, select one of the following operators from the second drop-down list:
 - = (is equal to)
 - <> (does not contain)
 - > (is greater than)
 - < (is less than)
 - >= (is greater than or equal to)
 - <= (is less than or equal to)

3. In the field provided, type the value in **UPPERCASE** to complete the rule.

Note: The Content Connector is case-sensitive, so alphanumeric rule values must be entered in uppercase. If alphanumeric values are entered in lowercase, then documents will not be uploaded for failure to satisfy the rules.

Note: If the OnBase Keyword Type is masked and contains static characters, omit the static characters when you enter the value. For example, if a masked Social Security Number Keyword Type is configured with dashes as static characters, omit the dashes when you enter the Social Security Number in the rule. The number 999-99-9999 would be entered as 999999999.

4. Click **Add Rule** to add the rule. Repeat these steps to add additional rules. To remove a rule, click the **Delete Rule** button (the **X** located to the right of the rule).

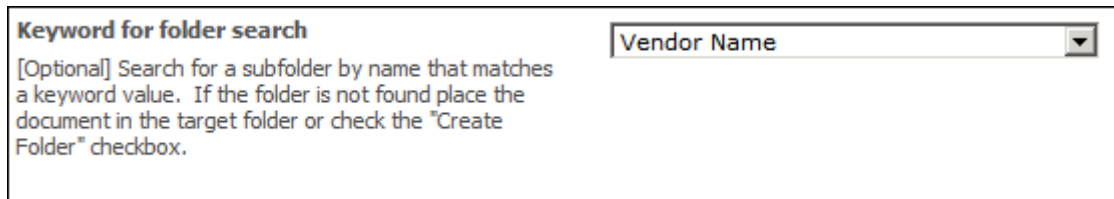
5. The next steps vary depending on whether you are configuring a library or a list.
 - If you are configuring a library, see the following topic, [Configuring Document Library Options on page 65](#).
 - If you are configuring a list, skip to [Configuring List Options on page 67](#).

Configuring Document Library Options

Document library options let you control where uploaded OnBase documents are displayed, how documents are matched to existing library folders, and whether the Content Connector can create new folders within the library.

1. Next to **Select Target Folder**, select the name of the root folder where documents should be added.

- Next to **Keyword for folder search**, select the Keyword Type the Content Connector will use to search for matching subfolders within the selected target folder. If the Content Connector finds a subfolder with a name that matches the Keyword value on a document, then the document is added to that subfolder.
If you do not select a Keyword Type, then documents are added to the root of the selected target folder.

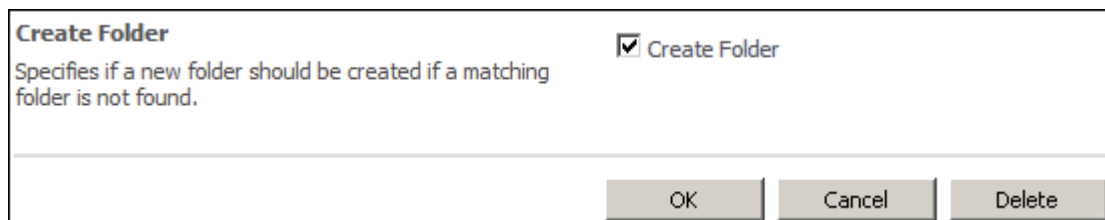


Keyword for folder search

[Optional] Search for a subfolder by name that matches a keyword value. If the folder is not found place the document in the target folder or check the "Create Folder" checkbox.

Vendor Name

- If you selected a Keyword Type in the previous step, determine whether you want the Content Connector to create new folders based on the Keyword Type. Select **Create Folder** to let the Content Connector create a new folder if an existing folder is not found. New folders' names correspond to the Keyword Type you selected in the previous step. This option applies only if you selected a Keyword Type as the **Keyword for folder search** in the previous step.



Create Folder

☒ Create Folder

Specifies if a new folder should be created if a matching folder is not found.

OK Cancel Delete

Note: If **Create Folder** is not selected, then documents without matching folders are discarded and not uploaded. Clear this option to filter out documents that do not match an existing folder.

- Click **OK** to save the batch process options for the document library.
In the configuration shown above, documents are uploaded to subfolders within the **AP Packing Slips by Vendor** folder. Each document is added to a subfolder whose name matches the document's **Vendor Name** keyword value. If a folder with a matching name doesn't exist, the Content Connector creates a new folder for the document.

Configuring List Options

The Content Connector attaches uploaded documents to list items based on the column-to-Keyword Type mapping configured on the content type. If a list item has a column value that matches the Keyword value on the OnBase document, the document is attached to the list item. If no match is found, then the Content Connector either does not upload the document to SharePoint, or it creates the list item to attach the document to.

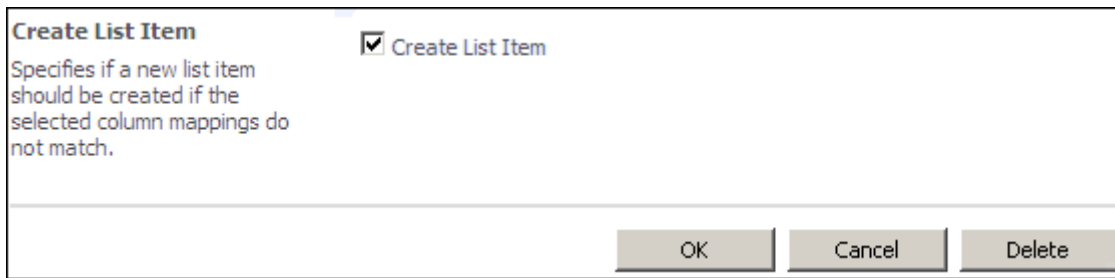
The following options let you define the mappings on which matches are based and control whether the Content Connector creates new list items for documents if a matching item is not found.

1. If necessary, select a column group from the **Select columns from** drop-down list.
2. From **Available columns**, select the column-to-Keyword Type mapping you want to use to match OnBase documents to list items. The mapped OnBase Keyword Type is displayed within parentheses next to each column type.

The screenshot shows the 'Select Columns' dialog box. On the left, there is a text box with instructions: 'Select from the list of available columns to search for a pre-existing item. The value in parenthesis is the Keyword Type the column is mapped to.' Below this is a 'Select columns from:' dropdown menu currently set to 'All Groups'. To the right of the dropdown is a list box titled 'Available columns:' containing 'Title (Vendor Name)'. Below the list box is a 'Column Description:' field showing 'None' and a 'Group:' field showing 'Custom Columns'. In the center are two buttons: 'Add >' and '< Remove'. To the right of these buttons is another list box titled 'Columns to add:' containing 'PO # (PO #)'.

3. Click **Add**. Repeat for each column type required to match documents to list items. If multiple column mappings are added, then OnBase documents must satisfy all of the added conditions to be successfully added to the SharePoint list.

4. Select **Create List Item** if you want the Content Connector to create a new list item if a matching list item cannot be found.



Note: If **Create List Item** is not selected, then documents that do not have matching list items are discarded from the process and not uploaded to SharePoint. Clear this option to filter out documents that do not match an existing list item.

5. Click **OK**.
In the configuration shown above, documents uploaded to SharePoint are attached to list items where the value of the **PO #** column matches the value of the **PO #** Keyword Type. If a matching list item is not found, the Content Connector creates a new list item for the document.

Deleting a Batch Process Configuration

If a batch process is currently associated with a library or list, the batch process configuration must be deleted before the batch process can be associated with another library or list. When you delete a batch process configuration, the associated batch process again becomes available for configuration.

1. Access the batch process configuration screen as described under [Enabling a Batch Process for a Library or List on page 61](#).
2. Click the **Delete** button in the lower-right corner. A confirmation prompt is displayed.
3. Click **OK**. The process configuration is deleted.



Content Connector for Microsoft SharePoint

User Guide

Opening OnBase Documents in SharePoint

Once OnBase documents are exposed through SharePoint, users can access them by clicking the document links from libraries and lists. For information about using the OnBase viewer, see [Viewing Documents on page 71](#).

Reviewing Verification Reports

When the Content Connector uploads documents to SharePoint, a verification report is automatically generated and stored in the **SYS Verification Reports** Document Type. Verification reports indicate which documents in the batch passed the configured rules and were uploaded successfully. Documents that failed to pass the configured rules have an upload status of **False**, indicating that they were not uploaded. Documents that passed the configured rules and were uploaded successfully have an upload status of **True**.

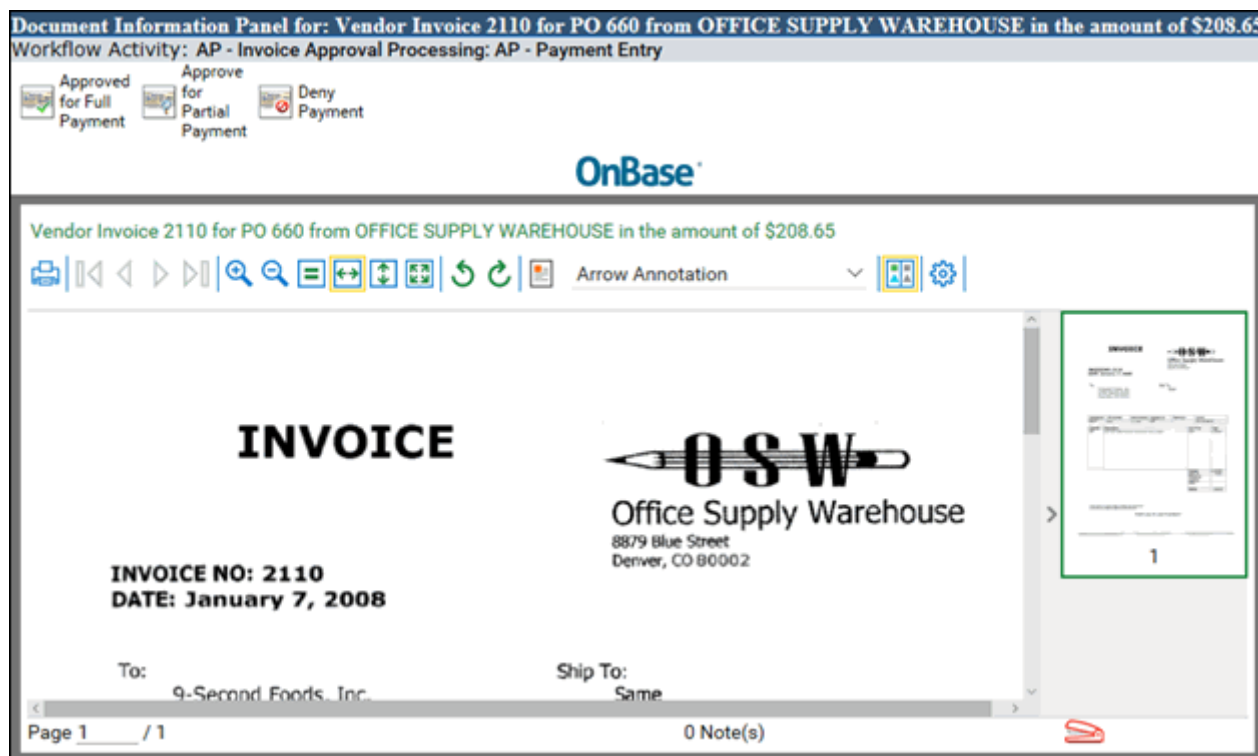
For information about retrieving documents from OnBase, see the OnBase Client help files.

This section is a guide to using the document viewer that is opened when you retrieve documents from OnBase through Microsoft SharePoint.

Note: If a document is deleted from OnBase, then the message **No Documents Found** is displayed when you click the document's link in SharePoint.

Workflow Viewer

Your solution may be set up to use the integrated OnBase Workflow viewer to display documents. This viewer displays a document's Workflow status, related documents, and available tasks.



Viewer components are described in the following table:

Component	Descriptions
Document Information Panel	<p>Displays the document's Auto-Name and Workflow status. If you open any related documents in the viewer, you can click the Auto-Name to return to the original document.</p> <p>The Workflow Activity status displays the Workflow life cycle name followed by the current queue(s). If the document resides in multiple life cycles and queues, the format is Life cycle 1: Queue A, Queue B; Life cycle 2: Queue C.</p> <p>If the document resides in multiple queues, the ad-hoc tasks and related documents belong to the queue in bold.</p>
Ad Hoc Tasks	<p>Displays ad hoc tasks you can perform on the document. Available tasks vary per queue.</p>
Related Documents	<p>Displays other documents related to the current document. You can select a document to display it in the viewer.</p> <p>To return to the original document, click the document's Auto-Name in the Document Information Panel.</p>
Document Viewer	<p>Displays the currently selected document. For information about using the document viewer, see Viewing Documents on page 73.</p>

When you perform an ad hoc task that transitions a document out of its current queue, the **Workflow Activity** status is updated to reflect that transition. If you have privileges to access the next queue in the life cycle, the **Workflow Activity** status displays the queue's name. If you do not have privileges to access any of the document's queues, the **Workflow Activity** status is removed, and the document remains available within SharePoint for reference.

Viewing Documents from Links

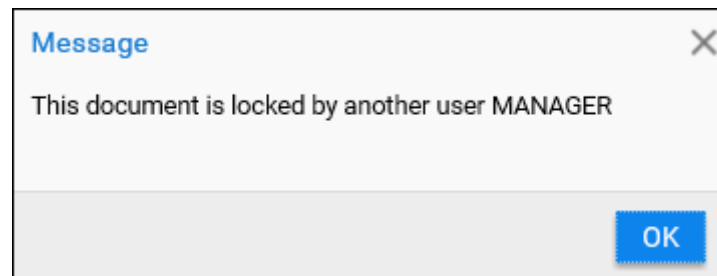
Your solution may be configured to display SharePoint document links as DocPop, PDFPop, UnityPop, or AEPop links. Depending on which is used, the document is displayed in a different viewer:

- DocPop links are displayed in either the HTML or ActiveX Web Client viewer. For more information on the Web Client viewer, see the following sections.
- PDFPop links are displayed as a PDF in a PDF viewer.
- UnityPop and AEPop links are displayed in the Unity Client viewer. For more information on the Unity Client viewer, see the **Unity Client** documentation.

Viewing Documents

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

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



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

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

Document Viewer

Note the following when working in the Document Viewer:

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

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

PDF Viewers

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

Document Viewer Shortcuts

The following keyboard shortcuts can be used when viewing documents:

Navigating Documents

The following keyboard functions allow you to navigate a document.

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

Zooming In and Out

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

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

Searching for Internal Text

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

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

Viewing Previous or Next Documents

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

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

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

Access a Document's Keyword Values

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

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

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

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

City Council Meeting - Minutes - 1/18/2017 (1/24/2017 12:13:46 PM)

Document Type Meeting Minutes

Document Date 1/24/2017

KEYWORDS

Meeting Date 1/18/2017

MM/dd/yyyy

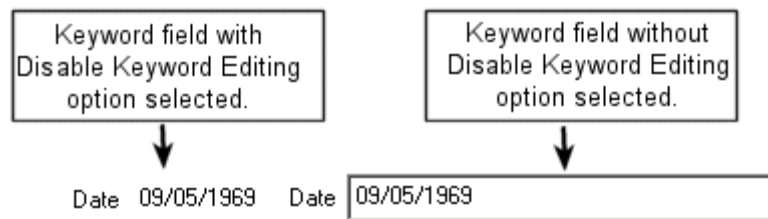
Meeting Type City Council

Meeting Name City Council Meeting

SequenceNumber

Save Cancel

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



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

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

Re-indexing

Re-indexing provides the ability to change Keyword Values, Document Date, and Document Type.

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

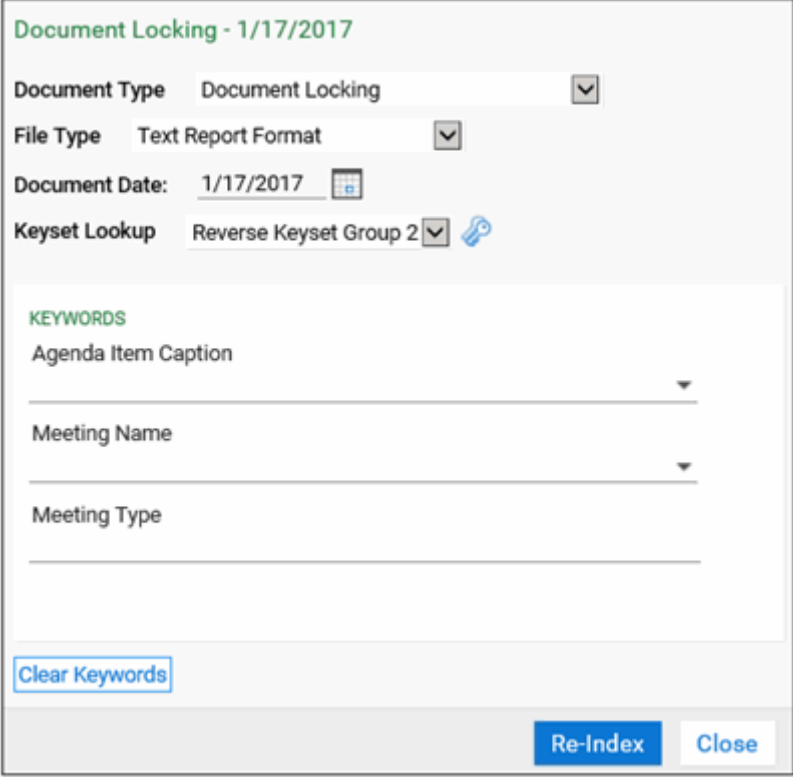
Re-Indexing Documents

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

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

Note: Ensure you understand the effects of re-indexing documents before proceeding. For more information, see [Considerations for Re-Indexing Documents and Adding or Modifying Keyword Values](#) on page 82.

1. Save any changes that you have made to a document before re-indexing.
2. From an open document or from a Document Search Results list, right-click and select **Re-Index** to open the **Re-Index Document** dialog box.



The image shows a 'Re-Index Document' dialog box titled 'Document Locking - 1/17/2017'. It contains several fields: 'Document Type' set to 'Document Locking', 'File Type' set to 'Text Report Format', 'Document Date' set to '1/17/2017', and 'Keyset Lookup' set to 'Reverse Keyset Group 2'. Below these is a section titled 'KEYWORDS' with three input fields: 'Agenda Item Caption', 'Meeting Name', and 'Meeting Type'. At the bottom left is a 'Clear Keywords' button, and at the bottom right are 'Re-Index' and 'Close' buttons.

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

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

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

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

Caution: If you are re-indexing a document associated with a Keyword Type Group (KTG) or Multi-Instance Keyword Type Group (MIKTG) filled by an AutoFill Keyword Set to another Document Type associated with the same KTG or MIKTG filled by an AutoFill Keyword Set, the AutoFill Keyword Set may unexpectedly re-populate secondary Keyword Values once the Document Type is changed. For more information, see [Considerations for Re-Indexing Documents and Adding or Modifying Keyword Values on page 82](#).

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

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

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

Click the **Calendar** icon next to the **Document Date** to select a date.

6. Depending on your system configuration, the **Initiate Workflow** check box may be displayed.

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

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

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

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

If the Keyword Type that you duplicate belongs to a Keyword Type group, then it can only be duplicated if the group is a Multi-Instance Keyword Type Group. The entire group is duplicated, not just the selected Keyword Type.
9. Press **Clear Keywords** if you want to clear all existing Keyword Values and re-enter new values.
10. Click **Re-Index** to save your changes and re-index the document. Click **Close** to cancel changes.

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

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

Keywords with Drop-Down Lists

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

- Click the drop-down button and scroll to the value you want to select.
- Place the cursor in the Keyword Type fields with the drop-down and press **F5** or the drop-down button to display available Keyword Values. Select a Keyword Value.

- Filter values available from the drop-down list by entering a word and/or character(s) that are part of the Keyword Value. When you press **F5** or the drop-down button, the list displays only values that match the entered characters. Scroll to your selection.

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

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

Re-Indexing Document Revisions

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

The revision process is the same as [Re-Indexing Documents on page 78](#), only you would access documents from the Document Results Search List using the Revisions/Rendition option from the right-click menu. When the **Revisions/Renditions** dialog box is displayed, select the oldest revision and re-index as needed. All the options available during a regular re-indexing are available when re-indexing a revision, including the ability to change the file type.

To show all of the available values in a Cascading Data Set, hold the **Ctrl** key and click the drop-down arrow.

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

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

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

- **Automatically Change Secondary Keyword Values of an AutoFill Keyword Set**

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

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

- **Keyword Values in Multi-Instance Keyword Type Groups**

If the original Document Type contains a Multi-Instance Keyword Type Group, the Document Type to which you want to re-index must contain the same Multi-Instance Keyword Type Group in order to preserve the integrity of the data relationship.

- Re-indexing from a standard Keyword Type that has multiple Keyword Type Values to a Multi-Instance Keyword Type Group is not supported. It is not supported because it is not known which instance of the Multi-Instance Keyword Type Group to associate with each Keyword Type Value. If you must re-index from standard Keyword Types to a Multi-Instance Keyword Type Group, you must manually enter all of the Keyword Type Values appropriately in the Multi-Instance Keyword Type Group instances.

- **AutoFilled Keyword Values in Keyword Type Groups or Multi-Instance Keyword Type Groups**

Re-indexing a document to another Document Type associated with the same Keyword Type Groups or Multi-Instance Keyword Type Groups causes any associated AutoFill Keyword Sets to re-populate the Keyword Values in the Keyword Type Group or Multi-Instance Keyword Group.

If Secondary Keyword Type Values contained in a Keyword Type Group or Multi-Instance Keyword Type Group initially populated by an AutoFill Keyword Set are changed at any time before the new Document Type is selected, some or all of the modified Keyword Values are overwritten if an AutoFill Keyword Set is configured to populate any of those values in the Keyword Type Group or Multi-Instance Keyword Type Group on the new Document Type. The overwritten Keyword Values become permanent once re-indexing is complete.

If the user closes the **Re-Index Document** dialog box before clicking the **Re-Index** button, or if the Secondary Keyword Values are changed in the **Re-Index Document** dialog box after the new Document Type is selected, the user is prompted to save.

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

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

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

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

- **Trigger Auto-Foldering**

If you re-index a document that is configured for auto-foldering, it will trigger an auto-foldering process.

- **Alter the contents of Dynamic folders**

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

- **Affect the appearance of your document**

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

- **Affect Workflow**

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

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

- **Notes and Annotations**

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

Retrieving Cross-Referenced Documents

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

From Image or Text-Based Documents

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

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

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

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

From E-Forms or HTML Documents

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

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

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

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

From PDF or OLE Documents

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

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

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

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

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

Deleting Documents

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

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

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

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

Deleting an Open Document

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

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

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

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

Navigate

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

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

Scale

The Scale feature provides options for viewing documents.

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

Process

There are several process options available when viewing documents.

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

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

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

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


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

Note: You can only save rotations on image documents.

Display

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

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

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

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

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

Send To Options

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

Display Considerations

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

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

From an Open Document

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

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

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

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

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

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

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

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

From the Document Search Results List

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

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

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

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

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

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

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

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

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

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

Option	Description
Original Format or Native Format	<p>Saves or sends the selected documents in the format in which they are stored in OnBase (for example, OLE documents such as Word documents and PDFs, uncompressed text documents, most image documents). Overlays are not applied.</p> <hr/> <p>Note: For multi-page image documents, this option saves the document as a single-file TIFF file.</p> <hr/> <p>Note: This content type is only available if the selected documents can be successfully saved or mailed in their original formats.</p> <hr/>
Rendered Format or AutoDetect Format	<p>Saves or sends each of the selected documents in the format that most represents a viewable document outside of OnBase. For example, an E-Form or Virtual E-Form is saved as an HTML file.</p>
PDF (.pdf)	<p>Saves or sends the selected documents as PDF files. For multiple documents selected, each document is converted to a separate PDF. Available for documents with any of the following file formats:</p> <ul style="list-style-type: none"> • Image file format • PCL • PCL with overlay • PDF • Text report format • Text report format with overlay • XML with style sheet

Option	Description
Encrypted PDF (.pdf)	<p>Sends the selected documents as encrypted PDF files. Each selected document is encrypted as a separate PDF. Upon choosing this content type, you will be prompted to enter a password, which the recipient will need to enter upon opening the attachment.</p> <p>Available for documents with any of the following file formats:</p> <ul style="list-style-type: none"> • Image file format • PCL • PCL with overlay • Text report format • Text report format with overlay
Image (.tif)	<p>Saves or sends the selected documents as TIFF files.</p> <p>Available for documents with any of the following file formats:</p> <ul style="list-style-type: none"> • Image file format • PCL • PCL with overlay • Text report format • Text report format with overlay <hr/> <p>Note: If a text document is configured to display an overlay by default, then the text document will be saved as an image with the overlay applied.</p> <hr/>
Text (.txt)	<p>Saves or sends the selected documents in plain text format.</p> <p>Available for documents with a text report format.</p> <p>Overlays are not applied.</p>
HTML (.htm;.html)	<p>Saves or sends the selected documents in .htm format.</p> <p>Available for documents using HTML and MHTML (for example, E-Forms, V-Forms).</p>
ZIP (.zip)	<p>Saves or sends the selected documents as a ZIP file.</p> <p>Available for any document or group of documents.</p>

Emailing Documents

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

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

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

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

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

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

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

Emailing a Document

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

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

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

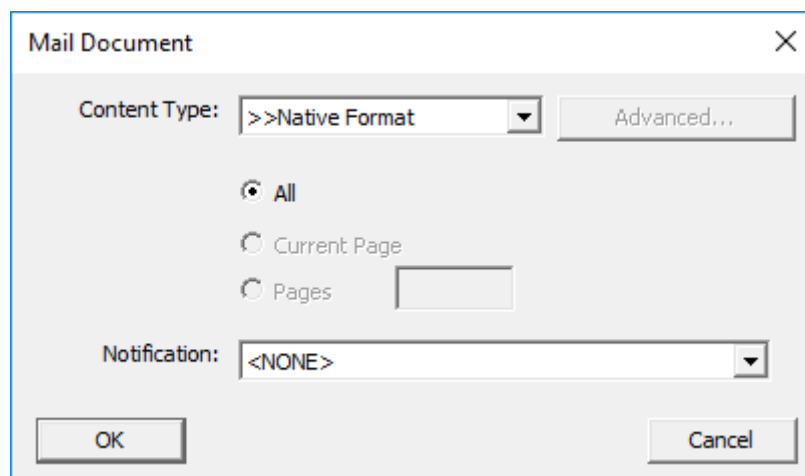
- If your default mail client is IBM Lotus Notes, emails composed in OnBase are auto-saved in the IBM Lotus Notes drafts folder. When emails are discarded in OnBase before being sent, they are not removed from the IBM Lotus Notes drafts folder.
- Email signatures cannot be automatically added for certain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

To email a document in the Web Client:

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

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

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



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

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

Option	Description
Original Format or Native Format	<p>Saves or sends the selected documents in the format in which they are stored in OnBase (for example, OLE documents such as Word documents and PDFs, uncompressed text documents, most image documents). Overlays are not applied.</p> <hr/> <p>Note: For multi-page image documents, this option saves the document as a single-file TIFF file.</p> <hr/> <p>Note: This content type is only available if the selected documents can be successfully saved or mailed in their original formats.</p> <hr/>
Rendered Format or AutoDetect Format	Saves or sends each of the selected documents in the format that most represents a viewable document outside of OnBase. For example, an E-Form or Virtual E-Form is saved as an HTML file.
PDF (.pdf)	<p>Saves or sends the selected documents as PDF files. For multiple documents selected, each document is converted to a separate PDF. Available for documents with any of the following file formats:</p> <ul style="list-style-type: none"> • Image file format • PCL • PCL with overlay • PDF • Text report format • Text report format with overlay • XML with style sheet
Encrypted PDF (.pdf)	<p>Sends the selected documents as encrypted PDF files. Each selected document is encrypted as a separate PDF. Upon choosing this content type, you will be prompted to enter a password, which the recipient will need to enter upon opening the attachment.</p> <p>Available for documents with any of the following file formats:</p> <ul style="list-style-type: none"> • Image file format • PCL • PCL with overlay • Text report format • Text report format with overlay

Option	Description
Image (.tif)	<p>Saves or sends the selected documents as TIFF files.</p> <p>Available for documents with any of the following file formats:</p> <ul style="list-style-type: none"> • Image file format • PCL • PCL with overlay • Text report format • Text report format with overlay <hr/> <p>Note: If a text document is configured to display an overlay by default, then the text document will be saved as an image with the overlay applied.</p> <hr/>
Text (.txt)	<p>Saves or sends the selected documents in plain text format.</p> <p>Available for documents with a text report format.</p> <p>Overlays are not applied.</p>
HTML (.htm;.html)	<p>Saves or sends the selected documents in .htm format.</p> <p>Available for documents using HTML and MHTML (for example, E-Forms, V-Forms).</p>
ZIP (.zip)	<p>Saves or sends the selected documents as a ZIP file.</p> <p>Available for any document or group of documents.</p>

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

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

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

4. Select one of the following page options:

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

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

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

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

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

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

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

Attachment Display Considerations

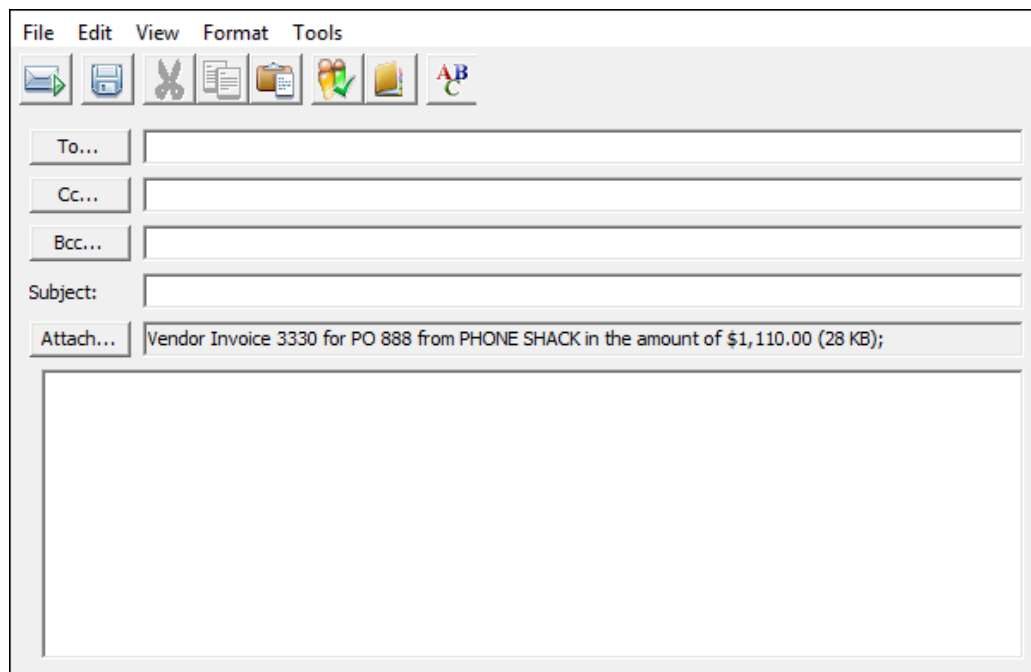
If the document you are sending has an overlay, the overlay is displayed on the attachment only if the overlay is displayed by default when you open the document in OnBase. Overlays are not displayed on attachments sent with a content type of **Native Format**, **Original Format**, or **Text (.txt)**.

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

Using the Mail Message Dialog Box

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

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











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

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

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

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

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

Checking Names and Addresses

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

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

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

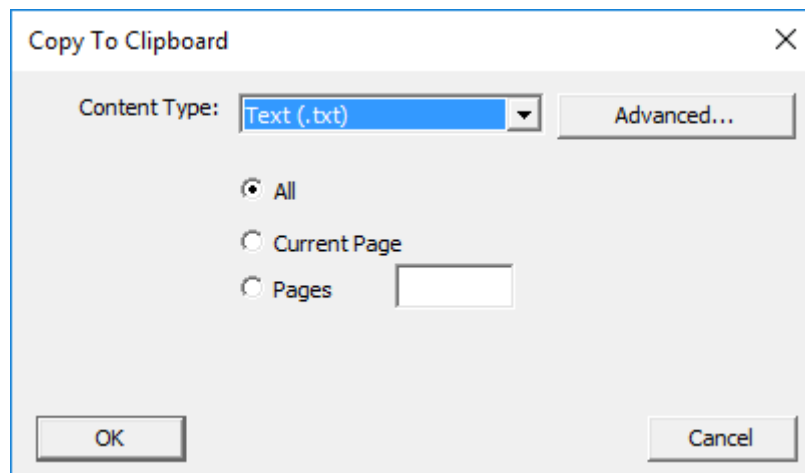
Send To | Clipboard - Copying Documents to the Clipboard

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

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

To copy a document to the clipboard:

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



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

Option	Description
Image (.tif)	Copies the selected documents as TIFF files. Available for documents with any of the following file formats: <ul style="list-style-type: none"> • Image file format • PCL • PCL with overlay • Text report format • Text report format with overlay
Text (.tif)	Copies the selected documents in plain text format. Available for documents with a text report format. Overlays are not applied.

3. Click **OK**.

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

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

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

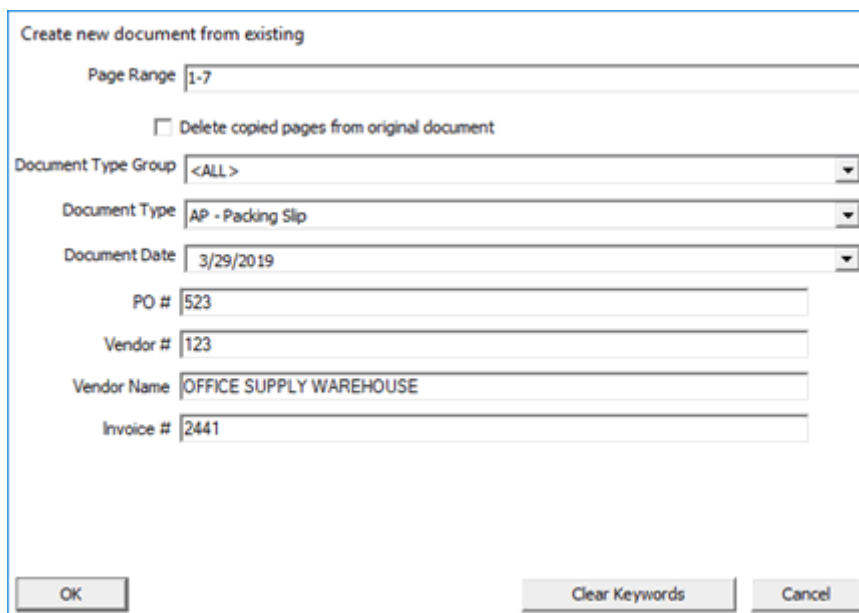
- If any Document Type in the **Search Results list** has **Copy to Clipboard/Save As** and **Create New** privileges, the **Create New Document** menu option is visible.
- If an individually selected document type in the **Search Results list** has **Copy to Clipboard/Save As** privileges, the **Create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

Create New Documents Using ActiveX

To create a new document using ActiveX controls:

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

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



Create new document from existing

Page Range

☐ Delete copied pages from original document

Document Type Group

Document Type

Document Date

PO #

Vendor #

Vendor Name

Invoice #

OK Clear Keywords Cancel

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

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

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

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

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

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

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

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

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

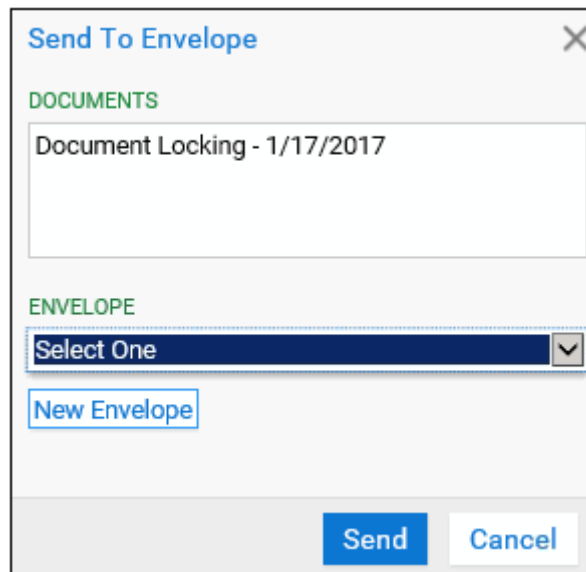
Depending on your user rights, the new document may not contain masked Keyword Values from the original document. See the **Encrypted Alpha Keywords** documentation for more information.
6. Depending on your system's configuration and licensing, the **Add To Workflow** option may be available. Select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

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

Adding Documents to an Envelope

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

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



The document or documents you selected are shown in the **Documents** list.

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

Saving Documents to Files

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

You can save documents to files in the following ways:

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

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

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

1. Do one of the following:

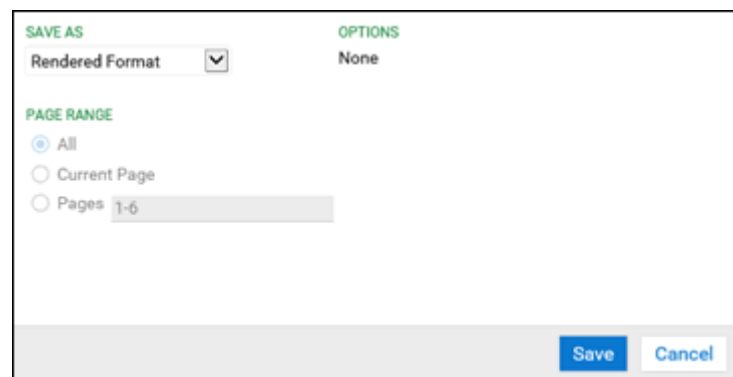
- From the Document Search Results list, select the documents you want to save, right-click, and select **Send To | File**.

Saving multiple documents requires downloading the documents to a single .zip file. For information on saving multiple documents from the Document Search Results List, see [Saving Multiple Documents to a Zip File on page 113](#).

- From an open text or image document, right-click and select **Send To | File**, or click the **Save to File** toolbar button.

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

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



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

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

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

Option	Description
Original Format or Native Format	<p>Saves or sends the selected documents in the format in which they are stored in OnBase (for example, OLE documents such as Word documents and PDFs, uncompressed text documents, most image documents). Overlays are not applied.</p> <hr/> <p>Note: For multi-page image documents, this option saves the document as a single-file TIFF file.</p> <hr/> <p>Note: This content type is only available if the selected documents can be successfully saved or mailed in their original formats.</p> <hr/>
Rendered Format or AutoDetect Format	<p>Saves or sends each of the selected documents in the format that most represents a viewable document outside of OnBase. For example, an E-Form or Virtual E-Form is saved as an HTML file.</p>
PDF (.pdf)	<p>Saves or sends the selected documents as PDF files. For multiple documents selected, each document is converted to a separate PDF. Available for documents with any of the following file formats:</p> <ul style="list-style-type: none"> • Image file format • PCL • PCL with overlay • PDF • Text report format • Text report format with overlay • XML with style sheet

Option	Description
Encrypted PDF (.pdf)	<p>Sends the selected documents as encrypted PDF files. Each selected document is encrypted as a separate PDF. Upon choosing this content type, you will be prompted to enter a password, which the recipient will need to enter upon opening the attachment.</p> <p>Available for documents with any of the following file formats:</p> <ul style="list-style-type: none"> • Image file format • PCL • PCL with overlay • Text report format • Text report format with overlay
Image (.tif)	<p>Saves or sends the selected documents as TIFF files.</p> <p>Available for documents with any of the following file formats:</p> <ul style="list-style-type: none"> • Image file format • PCL • PCL with overlay • Text report format • Text report format with overlay <hr/> <p>Note: If a text document is configured to display an overlay by default, then the text document will be saved as an image with the overlay applied.</p> <hr/>
Text (.txt)	<p>Saves or sends the selected documents in plain text format.</p> <p>Available for documents with a text report format.</p> <p>Overlays are not applied.</p>
HTML (.htm;.html)	<p>Saves or sends the selected documents in .htm format.</p> <p>Available for documents using HTML and MHTML (for example, E-Forms, V-Forms).</p>
ZIP (.zip)	<p>Saves or sends the selected documents as a ZIP file.</p> <p>Available for any document or group of documents.</p>

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

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

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

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

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

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

7. Click **OK**. The **Save As** dialog box is displayed.
8. Modify the file's name and location as needed. See [File Naming Conventions on page 113](#) for more information.
9. Click **Save** to save the file. Certain characters will be substituted in the file name upon saving.

File Naming Conventions

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

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

If the default **Save As** location already contains a file with a matching file name, OnBase automatically appends the new file's name with an underscore and an incremental number. For example, if **Checking Statement Acct#1020** already exists in the default **Save As** location, OnBase will name the new file **Checking Statement Acct#1020_1.tif**. See [Character Substitutions on page 114](#) for more information.

Saving Multiple Documents to a Zip File

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

To save multiple documents to a **.zip** file:

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

The screenshot shows a 'SAVE AS' dialog box. It has two main sections: 'SAVE AS' and 'OPTIONS'. Under 'SAVE AS', there is a 'Rendered Format' dropdown menu. Under 'OPTIONS', there is a 'None' option. Below these is a 'PAGE RANGE' section with three radio buttons: 'All' (which is selected), 'Current Page', and 'Pages' (which has a text input field next to it). At the bottom right of the dialog are 'Save' and 'Cancel' buttons.

3. Select a content type from the drop-down list to specify how the selected documents are saved within the .zip file. See [Saving Documents to Files on page 109](#) for more information on saving documents to a specific content type.

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

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

Character Substitutions

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

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

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

Printing

In addition to printing an entire document, or a page or range of pages, you can also print sections of a page using the Rubber Band feature. This section describes how to print documents and how to print or save sections of a document using the Rubber Band feature.

Document printing methods and options vary depending on which document viewer is being used (ActiveX or HTML). See the following sections for information. If you are unsure of which document viewer is being used to view documents, contact your system administrator.

- For printing documents in the ActiveX document viewer, see [Printing Documents on page 115](#).
- For printing documents in the HTML document viewer, see [Printing Documents in the HTML Document Viewer on page 122](#).

Printing Documents

The **Print** option is available if your computer system has access to a printer, and you have the appropriate user rights.

1. To print a document, perform one of the following actions:
 - From an open document or from one or more selected documents in the Document Search Results list, right-click and select **Print**.
 - From an open document, click the **Print** toolbar button.

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

If the option to print an OLE document is unavailable, you may still be able to send the document to a server print queue.

Note: Depending on your system's configuration, OLE documents may use your printer's default settings or the OLE document's default settings instead of the settings selected in the OnBase **Print** dialog box. If your document is not printing as expected, change your printer's settings or your document's settings to print the document as desired.

- If the document is open in an external application, select the print option from the external application. (For example, select **File | Print** from the application.)

The **Print** dialog box is displayed.

Print

Vendor Invoice 1330 for PO 881 from COMPUTERS ARE US in the amount of \$952.30

Print Queue: Local Printer

Print Format: < Default >

Orientation

- ☒ Portrait
- ☐ Landscape
- ☐ Auto Orientation

Print Overlay

- ☒ No Overlay
- ☐ Overlay
- ☐ Fax Compatible

Print Range

- ☒ All
- ☐ Current Page
- ☐ Selected
- ☐ Page:

Job Settings

Number of Copies:

- ☐ Single Print Job
- ☐ Continuous Flow

Notes Printing

- ☐ Annotation and/or Note Icon On Document
- ☐ Note Text On Document
- ☐ Note Text After Document

Default Settings

- ☐ Set As Default
- ☐ Automatically Print Using Default Settings

Print Revision

- ☒ Current Revision
- ☐ All Revisions
- ☐ Current Version
- ☐ All Versions

Color

- ☐ Color
- ☒ Black & White

Image Scaling

- ☒ Best Fit
- ☐ One-to-One

OK Properties Cancel

2. Select one of the available printers and the appropriate print options. For a description of print options available from the OnBase **Print** dialog box, see the following table.

Note: Depending on your configuration, the **Print** dialog box may default to print all pages or the current page of the document.

Option	Description
Print Queue	<p>Select the desired network print queue (mapped to the desired printer) from the Print Queue drop-down list. Print queues manage the manner in which documents are printed by defining the method for generating the print request, as well as the type of printer that will be used to print the document when it is sent to that queue. Available Print Queues are defined by your system administrator.</p> <hr/> <p>Note: To send a document to a Print Queue in the HTML Web Client, see Sending Documents to Print Queues in the HTML Web Client on page 128.</p> <hr/>
Print Format	<p>The Print Format drop-down list displays configured print formats, which determine the appearance of the selected documents. When you select a print format, its settings are used as defaults in the print dialog. The print format default is the print format associated with the Document Type of the first document selected for printing. If a batch is selected or no print format is associated with the Document Type, the setting is <Default>. To override the print format defaults, change the settings in the print dialog box.</p> <p>When printing multiple items with varying document types, select <Use Doc Type Default> from the Print Format drop-down list. This selection prints each document using the print format configured for its Document Type.</p> <hr/> <p>Note: The <Use Doc Type Default> option is not available when printing Document Types that do not have a default print format.</p> <hr/>
Orientation	<p>Portrait: Prints the top of the page on the shortest side of the paper.</p> <p>Landscape: Prints the top of the page on the longest side of the paper.</p> <p>Auto Orientation: Prints the page according to its dimensions. For example, if the height of the page is greater than the width, Portrait is used. If the width of the page is greater than the height, Landscape is used. For multi-page images, the orientation is determined on a page-by-page basis.</p> <hr/> <p>Note: These options do not apply to Microsoft Word documents and are not available for PDF documents.</p> <hr/> <p>Note: This setting is not respected when printing XML documents. XML documents are printed using the default orientation setting of the printer.</p> <hr/>

Option	Description
Print Overlay	<p>No Overlay: Prints the document without the associated overlay.</p> <p>Overlay: Prints the document with the associated overlay. The overlay that is printed may be different than the overlay that is displayed, depending on the configuration of the Document Type.</p> <p>Fax Compatible: Select this option if you are printing to a fax machine. OnBase arranges the overlay image in a way that faxing software can properly interpret. The overlay that is faxed may be different than the overlay that is displayed or printed, depending on the configuration of the Document Type.</p> <hr/> <p>Note: Printing overlays is not supported when running OnBase as a print server.</p> <hr/>
Print Range	<p>All: Prints all pages of the document(s).</p> <hr/> <p>Note: The All Print Range option is the only option available when printing PDF documents.</p> <hr/> <p>Current Page: Prints the current page.</p> <p>Selected: (Currently not available)</p> <p>Page: Prints a range of pages in the document.</p> <hr/> <p>Note: If you enter a complex range into this field, the pages are printed in the order entered. For example, if you entered 5, 1-3, 9, then page 5 of the document would be printed first, followed by pages 1, 2, 3, and 9. You cannot enter complex ranges when printing to a server print queue.</p> <hr/> <p>Note: The Print Range setting is not supported for printing E-Forms in the ActiveX Web Client.</p> <hr/>

Option	Description
Job Settings	<p>Number of Copies: Enter the number of copies to print.</p> <hr/> <p>Note: When printing several copies of a multi-page document to XPS or PDF Creator, some print jobs may combine.</p> <hr/> <p>Single Print Job: If multiple documents are highlighted for a print request, Single Print Job instructs OnBase to combine the selected documents into a single Windows print job, rather than printing each separately.</p> <hr/> <p>Note: The Single Print Job option only applies to documents that are natively rendered. Documents such as E-Forms and OLE documents cannot use the Single Print Job option.</p> <hr/> <p>Continuous Flow: If the multiple documents selected for a Single Print Job are formatted for a multi-image layout on the page, the Continuous Flow option tells OnBase to continue filling the page with images from the next document, filling the existing multi-page format before proceeding to the next page.</p> <p>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.</p> <p>If you select Continuous Flow, your output would be two pages, the first page having two documents and the second having the remaining third document. Continuous Flow cannot be used to control the format of PCL documents in a multi-image layout.</p>
Notes Printing	<p>Annotation and/or Note Icon On Document: Prints the note annotation (graphical representation of a note) on the document.</p> <p>Note Text On Document: Prints the title and text of any notes in that note's location on the document, the name of the user that created the note and the date and time it was created, and the Print Title configured for the selected Document Type. This option is not respected for HTML documents, OLE documents, or PDF documents. This option is not respected by Overlapped Text annotations.</p> <p>Note Text After Document: Prints the title and text of any notes, the name of the user that created the note and the date and time it was created, and the Print Title configured for the selected Document Type on a separate page.</p> <hr/> <p>Note: Depending on your system's configuration, some note icons or text may not be printed no matter what Notes Printing options you have selected. See your system administrator for more information.</p> <hr/> <p>Note: The Annotation and/or Note Icon On Document and Note Text On Document options do not apply to E-Forms, HTML forms, or XML documents.</p>

Option	Description
Print Revision	<p>These options are only available if your database is licensed for EDM Services. For more information, see the EDM Services documentation.</p> <hr/> <p>Note: The Current Revision option is automatically selected.</p> <hr/>
Color	<p>Color: Select to print in color.</p> <p>Black & White: Select to print in black and white.</p> <hr/> <p>Note: These options do not apply to Microsoft Word documents and are not available for PDF documents.</p> <hr/> <p>Note: Depending on your installed print drivers, these options may not be respected with certain printers.</p> <hr/>
Default Settings	<p>Set as Default: Select this option to use the settings that you have selected in this dialog box as the default print settings. The settings will remain selected as default on that workstation for all document types until the check box is deselected.</p> <p>Automatically Print Using Default Settings: This setting is reserved for future use.</p>
Image Scaling	<p>Best Fit: Prints image to fit, with scaling as necessary.</p> <p>One-to-One: Prints image actual size/scale (1:1 in terms of inches).</p>

Note: Select the **Properties** button to configure options specific to the selected printer. See the documentation for your printer for more information on these options. The **Properties** button is not available for PDF documents.

3. Click **OK**.

Note: Not all methods are available from all Document Types.

E-Forms not Printing Correctly

Some users may encounter the following issue: when printing an E-Form from a results list (such as a Document Search Results list), the E-Form is printed without any data (i.e., only a blank shell of the E-Form is printed). This behavior is caused by the way Internet Explorer handles security. Users are still able to print E-Forms by opening the E-Form and printing from the Document Viewer.

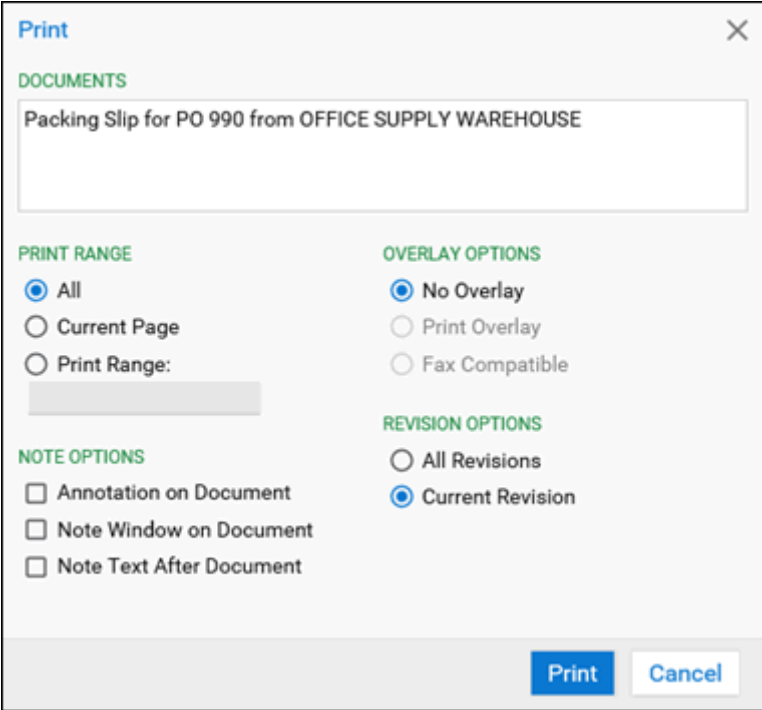
Printing Documents in the HTML Document Viewer

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

Note: If the document is open in an external application, such as Microsoft Word, use the print option in the external application. For example, select **File | Print** from the application. In this case, OnBase print options are not used.

To print a document using the HTML viewer:

1. From an open document, click the **Print** toolbar button.
The **Print** dialog box is displayed.

The image shows a 'Print' dialog box with a title bar containing the word 'Print' and a close button. The dialog is divided into several sections. The 'DOCUMENTS' section at the top contains a text box with the document title 'Packing Slip for PO 990 from OFFICE SUPPLY WAREHOUSE'. Below this are three main sections of options: 'PRINT RANGE' with radio buttons for 'All' (selected), 'Current Page', and 'Print Range' (with an empty text input field); 'OVERLAY OPTIONS' with radio buttons for 'No Overlay' (selected), 'Print Overlay', and 'Fax Compatible'; and 'REVISION OPTIONS' with radio buttons for 'All Revisions' and 'Current Revision' (selected). At the bottom left, under 'NOTE OPTIONS', are three unchecked checkboxes: 'Annotation on Document', 'Note Window on Document', and 'Note Text After Document'. At the bottom right are 'Print' and 'Cancel' buttons.

2. Select the appropriate print options. See the following table for descriptions of the available print options.

Option	Description
Print Range	<p>All: Prints all pages of the document(s).</p> <hr/> <p>Note: The All Print Range option is the only option available when printing PDF documents, or when printing from a Document Search Results list. To print a range of pages for a non-PDF document, you must open the document and print using the Print toolbar button.</p> <hr/> <p>Current Page: Prints the current page.</p> <p>Print Range: Prints a range of pages in the document. Enter page numbers and/or page ranges, separated by commas. For example: 1,3,5-12.</p> <hr/> <p>Note: If you enter a complex range into this field, the pages are printed in the order entered. For example, if you entered 5, 1-3, 9, then page 5 of the document would be printed first, followed by pages 1, 2, 3, and 9. You cannot enter complex ranges when printing to a server print queue.</p> <hr/>
Overlay Options	<p>No Overlay: Prints the document without the associated overlay.</p> <p>Print Overlay: Prints the document with the associated overlay. The overlay that is printed may be different than the overlay that is displayed, depending on the configuration of the Document Type.</p> <p>Fax Compatible: Select this option if you are printing to a fax machine. OnBase arranges the overlay image in a way that faxing software can properly interpret. The overlay that is faxed may be different than the overlay that is displayed or printed, depending on the configuration of the Document Type.</p>
Note Options	<p>Annotation on Document: Prints the note annotation (graphical representation of a note) on the document.</p> <p>Note Window on Document: Prints the title and text of any notes in that note's location on the document, the name of the user that created the note, the date and time it was created, and the Print Title configured for the selected Document Type. This option is not respected for HTML documents, OLE documents, or PDF documents. This option is not respected by Overlapped Text annotations.</p> <p>Note Text After Document: Prints the title and text of any notes, the name of the user that created the note, the date and time it was created, and the Print Title configured for the selected Document Type on a separate page.</p> <hr/> <p>Note: Depending on your system's configuration, some note icons or text may not be printed no matter what Notes Options you have selected. See your system administrator for more information.</p> <hr/> <p>Note: The Annotation on Document and Note Window on Document options do not apply to E-Forms, HTML forms, or XML documents.</p> <hr/>

Option	Description
Revision Options	<p>These options are only respected if your database is licensed for EDM Services. For more information, see the EDM Services documentation.</p> <hr/> <p>Note: The Current Revision option is automatically selected.</p> <hr/>

3. Click **Print**. A new window is displayed, containing a PDF version of the document with your page range selection applied.
Depending on your configuration settings, your browser's print dialog box may also be displayed.
4. Click **Print** to continue printing the document.

Printing E-Forms in the HTML Document Viewer

If you have rights to print E-Form documents, prior to printing an E-Form, you can select an optimized print layout for the form. This process renders the E-Form in a more print-friendly layout.

To optimize an E-Form for printing:

1. Right-click on an open E-Form in the document viewer.
2. Select the **Print** menu option. The E-Form is displayed in a new window:

The screenshot shows a 'Print Options' dialog box on the left and a preview of an E-Form on the right.

Print Options Dialog:

- LAYOUT:**
 - ☒ **Browser Layout** (Print the E-Form as rendered.)
 - ☐ **Optimized Layout** (Optimize the E-Form for printing.)
- NOTE OPTIONS:**
 - ☒ **Do not print**
 - ☐ Print annotations on document
 - ☐ Print note windows on document
- NOTE TEXT:**
 - ☐ Include note text after document

Buttons: **Print** (blue), **Cancel** (white)

E-Form Preview:

Name: JANE HARPER SSN# 123-45-6789
 Position Applied For: NURSE

9-Second Foods Applicant Information [Submit/Save]

General Information

Employee Information:
 Street Address: 101 MAIN STREET
 City: COLUMBUS
 State: OH
 Zip Code: 43215
 Phone No.: (614)555-1234
 Email Address: JHARPER@EMAIL.COM

Education History

College Information:
 Name and Location: The Ohio State University
 Course of Study: Nursing
 # of Years Completed: 4
 Did You Graduate: yes
 Degree or Diploma?: Registered Nurse

Employment History

Present/Most Recent:
 Company Name: Cleveland Clinic

From this window, you can select an optimized print layout for the E-Form. By default, the **Browser Layout** print option is selected. This option prints the E-Form as it is rendered by your Web browser. A preview of how the E-Form will print is displayed on the right side of the screen.

3. To choose an optimized print layout, select **Optimized Layout**. The following options become available:
 - **In-Place:** Removes the form field boxes from the print view, leaving behind the text values from the form fields. The styling of the E-Form is retained.
 - **Row-Based:** Removes the styling of the E-Form, leaving behind only the form field titles and their field values.
 - **Tabular-Based:** Removes the styling of the E-Form, and places the form field titles and their field values into a table layout.

The E-Form print preview is updated based on the optimized layout setting that you select.

4. Select an option in **Note Options** to specify how to print notes on the E-Form:

Note: The **Note Options** are not available for row-based or tabular-based optimized layouts.

- The **Do not print** option does not allow notes to be printed on the E-Form.
- The **Print annotations on document** option prints the note annotation (graphical representation of a note) on the E-Form.
- The **Print note windows on document** option prints the title and text of any notes in that note's location on the E-Form, the name of the user that created the note, and the date and time it was created.

The E-Form print preview is updated based on the **Note Options** that you select.

5. Select the **Include note text after document** option to print the title and text of any notes, the name of the user that created the note, and the date and time it was created below the printed form field titles and values.

Note: The **Include note text after document** option is only available for row-based or tabular-based optimized layouts.

6. When you are finished selecting a print layout, click **Print**. Your Web browser's print dialog box is displayed.
7. Click **Print** to continue printing the document.

Print or Copy Sections of a Document Using Rubber Band

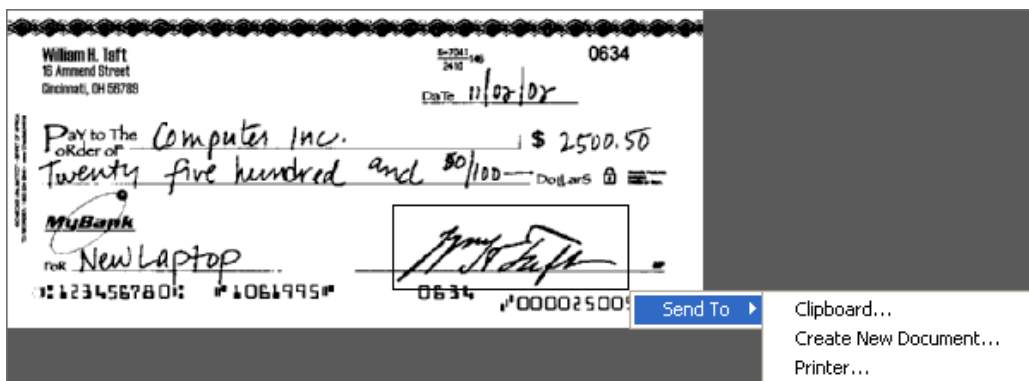
You can print or copy an area of a text or image document using the Rubber Band feature. Copied content can be pasted into another program or be used to create a new document in OnBase. To successfully print or copy selected areas of a text document with an overlay applied, the overlay must be removed.

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

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

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

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



4. Select one of the following options:

Option	Description
Clipboard	Copies the selected content to the clipboard. A confirmation message tells you whether text or image content has been copied. If the document is a text document, the selected text is copied. If the document is an image document, the selected area of the image is copied. You can then paste the copied content into an appropriate program.
Create New Document	Available for image documents only, this option creates a new OnBase document from the selected area. After you select this option, the Create new document from existing dialog box is displayed. Index the new document by specifying the Document Type Group, Document Type, Document Date, and any Keyword Values. <ul style="list-style-type: none"> Click OK to create the new document. Click Clear to remove the currently displayed values. Click Cancel to exit without creating a new document.
Printer	Prints the selected area. If you select this option, the Print dialog is displayed. Select the desired settings and click OK . The Confirm dialog box displays the following message: Do you want the zoom region resized to fit the printed page width? <ul style="list-style-type: none"> Select Yes to resize the selected area to the fit the width of the printed page. Select No to print the selected area in its true size. Select Cancel to exit without printing.

Sending Documents to Print Queues in the HTML Web Client

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

Note the following considerations:

- This option is only available in the HTML Web Client.
- This option does not support printing Unity Forms.
- This option does not support two-sided printing.

To send documents to a server print queue:

1. Right-click the document from the Document Search Results list or Document Viewer and select **Send To | Server Print Queue**. The **Send To Server Print Queue** dialog box is displayed.

Send To Server Print Queue

DOCUMENTS

Resolution for - ()

PRINT QUEUE

Network Printer

PRINT FORMAT

< Default >

ORIENTATION

☒ Portrait

☐ Landscape

PRINT RANGE

☒ All

☐ Pages: -

NOTE OPTIONS

☐ Annotation on Document

☐ Note Window on Document

☐ Note Text After Document

OVERLAY OPTIONS

☐ Print Overlay

☐ Fax Compatible

JOB SETTINGS

Copies: 1

☐ Single Print Job

☐ Continuous Flow

REVISION OPTIONS

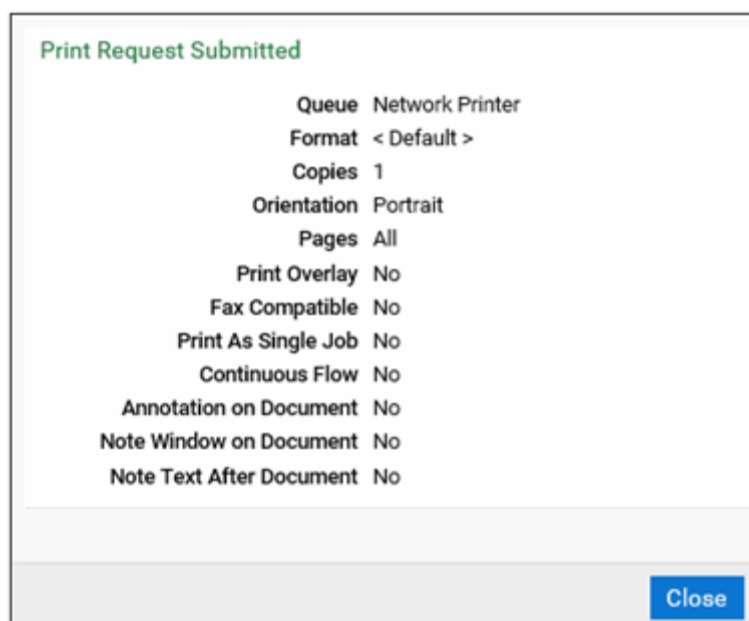
☐ All Revisions

☒ Current Revision

Submit Request **Cancel**

2. Edit the options as needed. See the following table for information.

- Click **Submit Request**. The **Print Request Submitted** dialog box is displayed listing all the options you selected.



- Click **Close** to close the dialog box.

Print Queue Dialog Box Options

The following table describes the options in the **Print Queue** dialog box.

Option	Description
Print Queue	Select the desired network print queue (mapped to the desired printer) from the Print Queue drop-down list. Print queues manage the manner in which documents are printed by defining the method for generating the print request, as well as the type of printer that will be used to print the document when it is sent to that queue. Available Print Queues are defined by your system administrator.
Print Format	The Print Format: drop-down list displays configured print formats, which determine the appearance of the selected documents. When you select a print format, its settings are used as defaults in the print dialog. The print format default is the print format associated with the document type of the first document selected for printing. If a batch is selected or no print format is associated with the Document Type, the setting is <Default> . To override the print format defaults, change the settings in the print dialog box.
Orientation	Portrait: Prints the top of the page on the shortest side of the paper. Landscape: Prints the top of the page on the longest side of the paper.

Option	Description
Print Range	<p>All: Prints all pages of the document(s).</p> <hr/> <p>Note: The All Print Range option is the only option available when printing PDF documents.</p> <hr/> <p>Selected: (Currently not available)</p> <p>Pages: Prints a range of pages in the document.</p>
Note Options	<p>Annotation On Document: Prints the note annotation (graphical representation of a note) on the document.</p> <p>Note Window On Document: Prints the note text on the document.</p> <p>Note Text After Document: Prints the text of all document notes on a separate page.</p>
Overlay Options/Print Overlay	<p>Print Overlay: Prints the document with the associated overlay. The overlay that is printed may be different than the overlay that is displayed, depending on the configuration of the Document Type.</p> <p>Fax Compatible: Select this option if you are printing to a fax machine. OnBase arranges the overlay image in a way that faxing software can properly interpret. The overlay that is faxed may be different than the overlay that is displayed or printed, depending on the configuration of the Document Type.</p>
Job Settings	<p>Copies: Enter the number of copies to print.</p> <p>Single Print Job: If multiple documents are highlighted for a print request, Single Print Job instructs OnBase to combine the selected documents into a single Windows print job, rather than printing each separately.</p> <hr/> <p>Note: The Single Print Job option only applies to documents that are natively rendered. Documents such as E-Forms and OLE documents cannot use the Single Print Job option.</p> <hr/> <p>Continuous Flow: If the multiple documents selected for a Single Print Job are formatted for a multi-image layout on the page, the Continuous Flow option tells OnBase to continue filling the page with images from the next document, filling the existing multi-page format before proceeding to the next page.</p> <p>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.</p> <p>If you select Continuous Flow, your output would be two pages, the first page having two documents and the second having the remaining third document.</p> <p>Continuous Flow cannot be used to control the format of PCL documents in a multi-image layout.</p>
Revision Options/Print Revision	<p>All Revisions: Prints all document revisions that you have permission to view.</p> <p>Current Revision: Prints the most current document revision that you have permission to view.</p>

File Format not Supported for Printing

If you see the following error message upon trying to print one or more documents from a Document Search Results list, the File Format is not supported for printing, or the page range is not valid. See your system administrator for additional information regarding file formats.

File type of one or more selected documents does not support printing from the hit list.

Note: Printing .MSG and .EML file type documents from the Document Search Results list is not supported in the ActiveX Web Client. These documents must be opened and printed from their native applications.

Toolbars in the Document Viewer

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

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

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

Showing or Hiding Toolbars

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

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

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

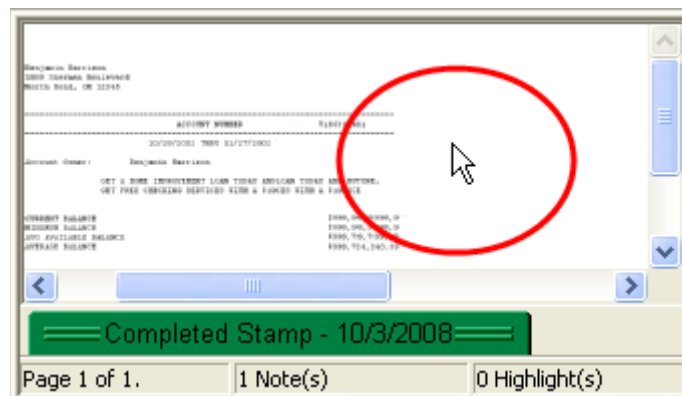
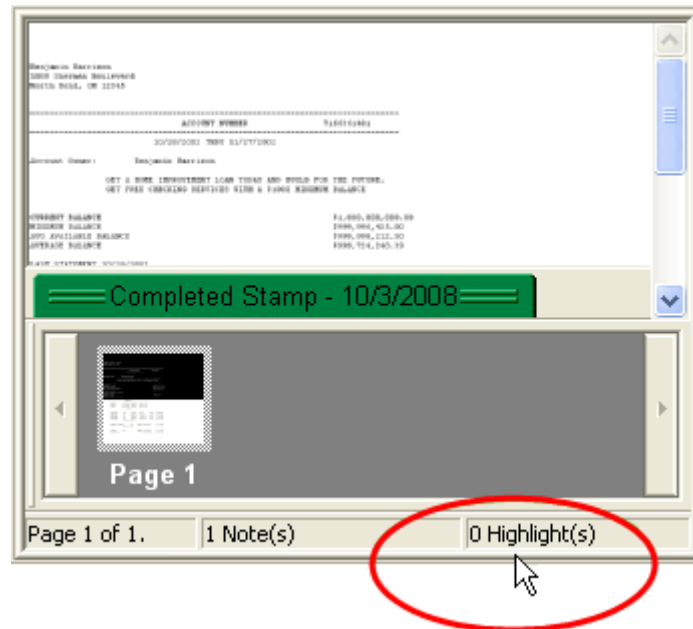
Auto-Hide Toolbars

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

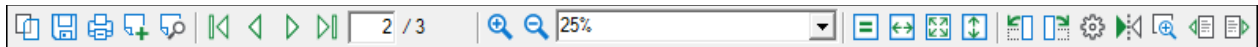
1. Ensure the toolbar you wish to Auto-Hide is set to show.
2. Right-click on the toolbar to toggle Auto-Hide on or off for the toolbars that display in that area:
 - Right-click in the **Viewer** header to toggle Auto-Hide on or off for the toolbars that display in the header (Viewer Control, Annotations,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

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













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

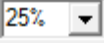














Viewer Control Toolbar



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

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

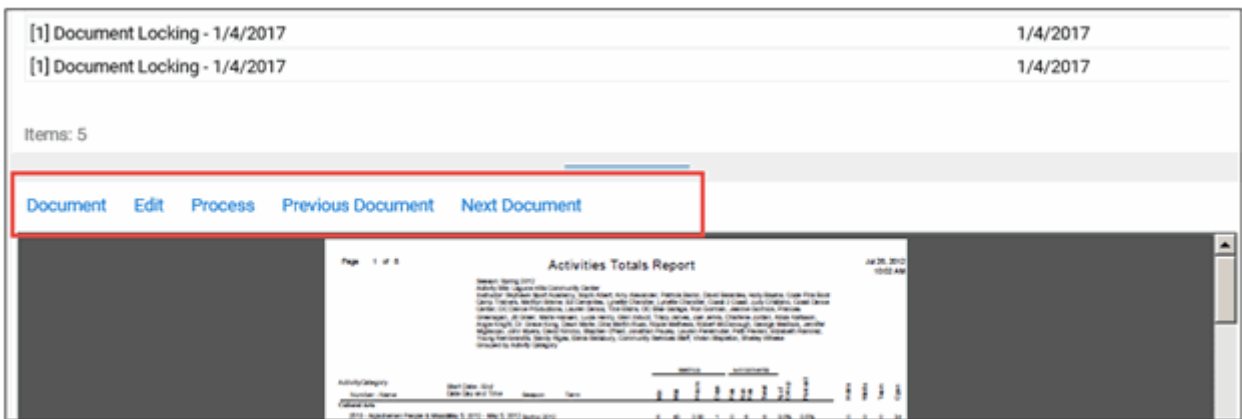
Button	Description
	<p>Sizing options allow you to select a standard sizing option. Select a specific percentage of reduction or magnification (25%, 50%, 75%, 100%, or 200%), Fit Width, Fit Height, Fit Window, or True Size.</p> <p>Also displays the current magnification percentage whenever the Scale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

PDF Viewer Toolbar

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



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



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

Options Button - OnBase Viewer Options

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



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

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

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

Changing Thumbnail Size

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

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



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

A dialog box titled "Viewer Options" with a close button (X) in the top right corner. The dialog contains several settings:

- Maximum Thumbnail Width:** A text box containing the value "100".
- Maximum Thumbnail Height:** A text box containing the value "100".
- Enable Thumbnail Zoom:** An unchecked checkbox.
- Zoom Width:** A text box containing the value "250".
- Zoom Height:** A text box containing the value "250".
- Show Note Icons and Annotations When Open:** A checked checkbox.
- Always Show Note Icons and Annotations:** A checked checkbox.
- Enable Auto-Scroll:** A checked checkbox.
- Draw Annotation On Rubberband:** An unchecked checkbox.
- Reuse Zoom Region:** An unchecked checkbox.
- Suppress Blank Pages:** A checked checkbox.
- Connection Timeout (seconds):** A text box containing the value "300".
- Buttons:** "OK" and "Cancel" buttons at the bottom.

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

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

Change Zoomed Thumbnail Size

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

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



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

 A dialog box titled "Viewer Options" with a close button (X) in the top right corner. The dialog contains several settings:

- Maximum Thumbnail Width:** 100
- Maximum Thumbnail Height:** 100
- ☐ **Enable Thumbnail Zoom**
- Zoom Width:** 250
- Zoom Height:** 250
- ☒ **Show Note Icons and Annotations When Open**
- ☒ **Always Show Note Icons and Annotations**
- ☒ **Enable Auto-Scroll**
- ☐ **Draw Annotation On Rubberband**
- ☐ **Reuse Zoom Region**
- ☒ **Suppress Blank Pages**
- Connection Timeout (seconds):** 300
- Buttons:** OK and Cancel

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

Enable Auto-Scroll

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

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

P.O. DATE	REQUISITIONER	SHIP VIA	F.O.B. POINT	TERMS
05/23/15	Andrew Lincoln	UPS	1330	2% 10; NET 30

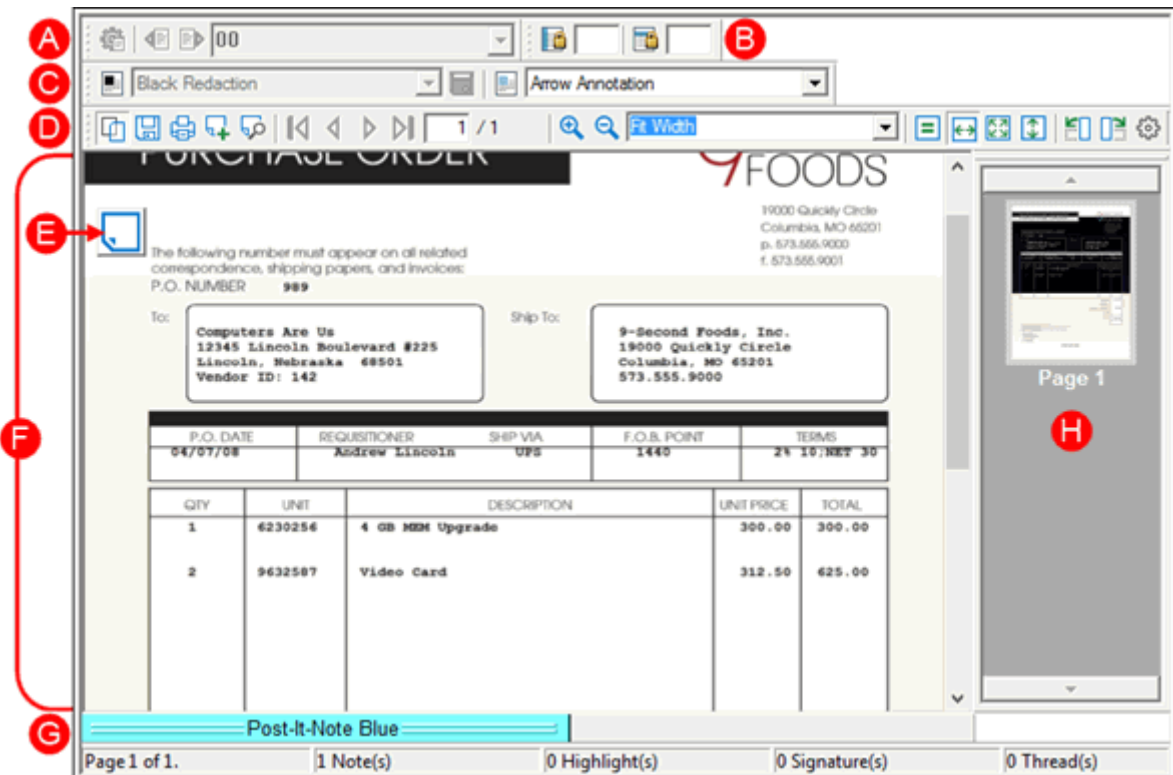
QTY	UNIT	DESCRIPTION	UNIT PRICE	TOTAL
3	0023426	YELLOW RUBBER GRIP HAMMER	21.50	64.50
3	0064203	3/4 IN. NAILS - 100	2.50	7.50

SUBTOTAL		72.00
SALES TAX		
SHIPPING & HANDLING		
OTHER		
TOTAL		72.00

Page 1 of 1. 0 Note(s) 0 Highlight(s) 0 Signature(s) 0 Thread(s)

Display Options for Notes and Annotations

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



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

Show Note Icons and Annotations When Open

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

Always Show Note Icons and Annotations

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

Draw Annotation On Rubberband

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

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

Retaining the Zoom Region from Page to Page

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

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

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

Suppressing Blank Pages

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

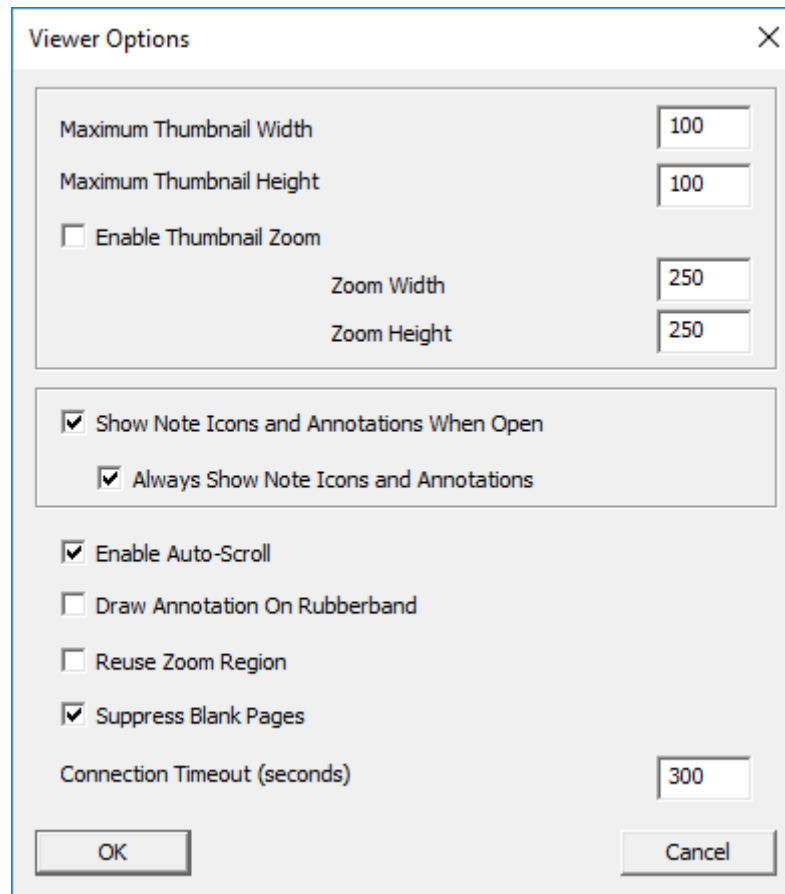
Note: The **Suppress Blank Pages** function is not supported in the ActiveX Web Client.

To suppress blank page thumbnails in the Document Viewer:

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



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



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

Adjusting Connection Timeout

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

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



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

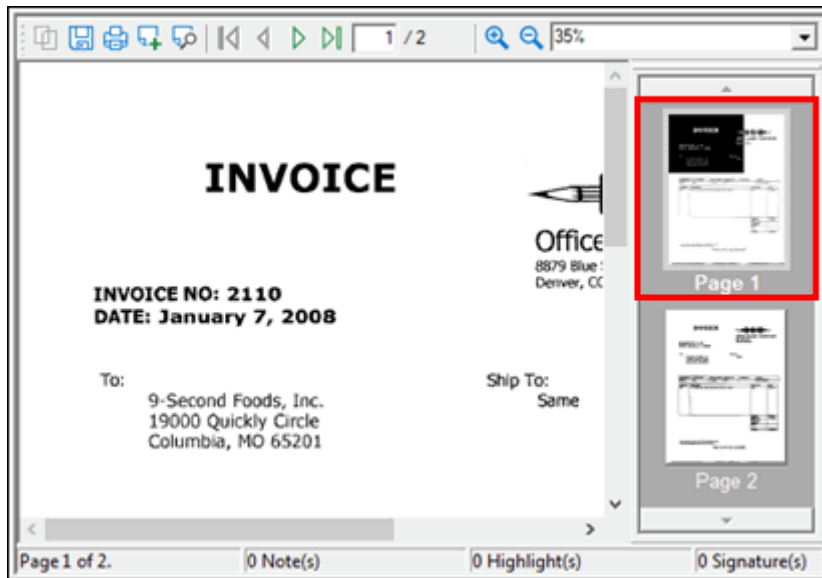
A dialog box titled "Viewer Options" with a close button (X) in the top right corner. It contains several settings:

- Maximum Thumbnail Width: 100
- Maximum Thumbnail Height: 100
- ☐ Enable Thumbnail Zoom
- Zoom Width: 250
- Zoom Height: 250
- ☒ Show Note Icons and Annotations When Open
- ☒ Always Show Note Icons and Annotations
- ☒ Enable Auto-Scroll
- ☐ Draw Annotation On Rubberband
- ☐ Reuse Zoom Region
- ☒ Suppress Blank Pages
- Connection Timeout (seconds): 300
- Buttons: OK and Cancel

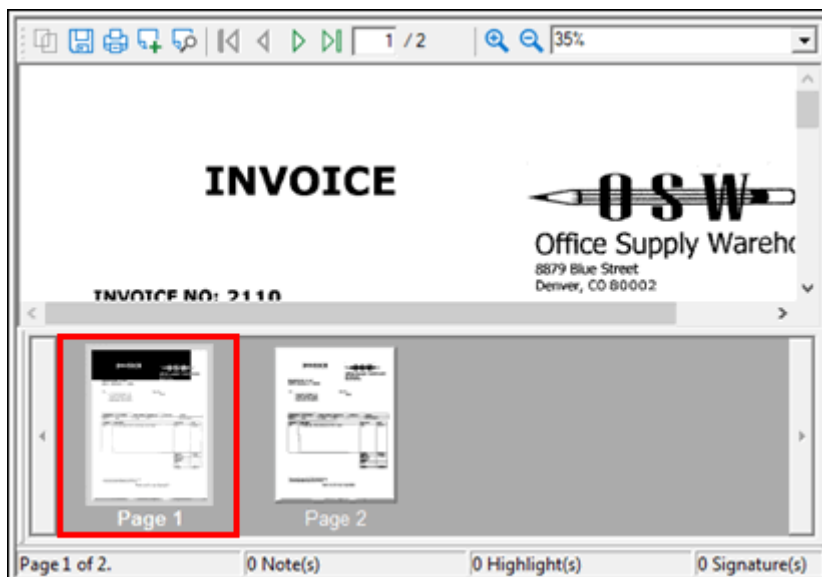
2. In the **Connection Timeout** box, adjust the timeout. The minimum and default setting value is **300** seconds (five minutes).
3. Click **OK** to save your changes.

Pages Toolbar - View Document Thumbnails

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



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



Show or Hide Thumbnails

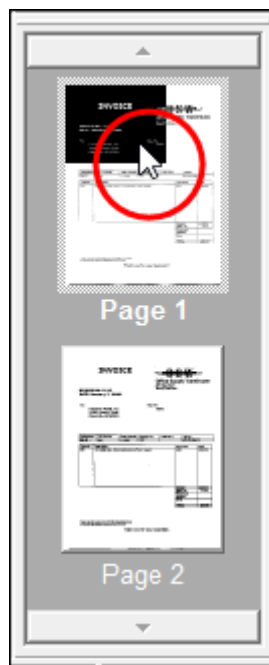
Thumbnails can be displayed or hidden by default. To show or hide thumbnails, right-click anywhere in the Document Viewer and select **Toolbars | Pages**. This toggles the thumbnails on or off.

Navigating the Document Using Thumbnails

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

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

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



Zooming Thumbnails

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

Reordering Pages in a Document Using Thumbnails

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

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

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

Adding Pages to a Document Using Thumbnails

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

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

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

To add pages to an image document:

1. Retrieve the document to which you want to add pages.
2. In the document select list, right-click the name of the document containing the page or pages that should be added to the document from the previous step and select **Open in New Window**.
The selected document is displayed in a new viewer window.
3. In the **Pages** toolbar of the new window, select the page that you want to add to the first document.
4. Right-click and hold down the mouse button on the thumbnail for that page.
5. Drag-and-drop the thumbnail to the pages toolbar of the first document. When you drop the thumbnail on the pages toolbar, the page is added in the position where you dropped it. For example, if you drop the thumbnail on top of page 1, the new page becomes page 1, and the old page becomes page 2.

Deleting Pages from a Document Using Thumbnails

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

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

Internal Text Search Toolbar

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






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

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

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

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

Button	Description
	Text Search Options limits your searches to one or more columns (character positions) or to a column index (a predefined text block). You can also specify whether the search should start from the beginning of the document or the current page. For more information, see Limiting Searches Using Text Search Options on page 150 .
	Find Previous searches for the preceding occurrence of the specified string within the current text document.
	Find Next searches for the following occurrence of the specified string within the current text document.

Performing an Internal Text Search

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

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

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

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

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

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

Limiting Searches Using Text Search Options

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

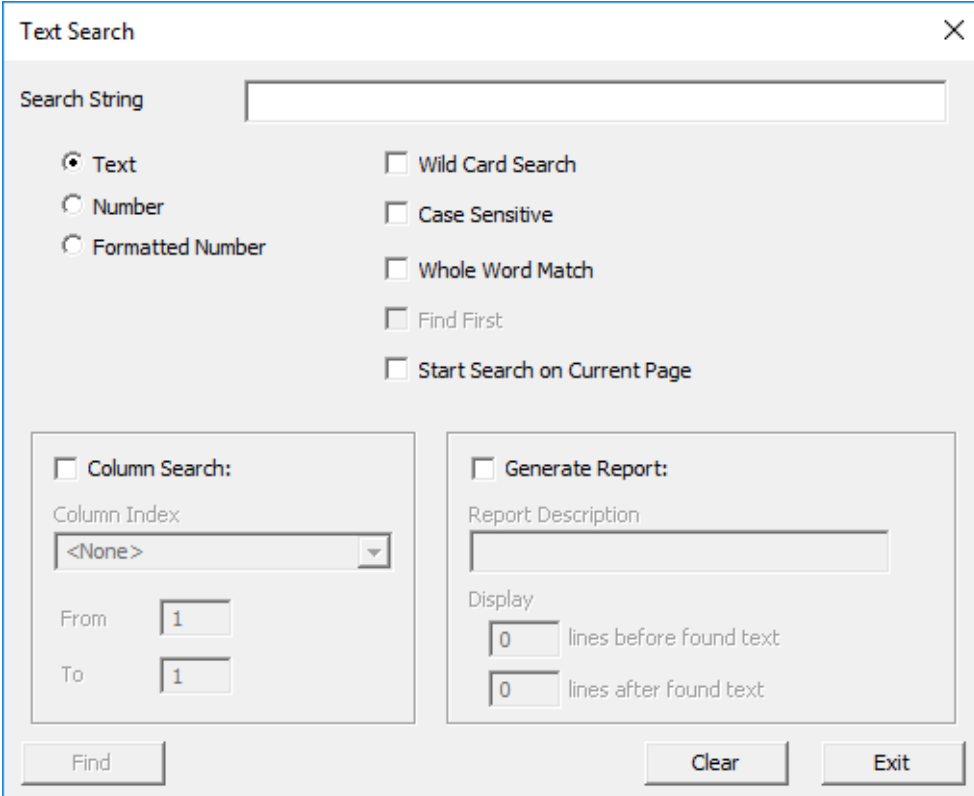
- If you know the string occurs somewhere between the current page and the end of the document, you can apply an option to start the search from the page you are currently viewing.
- If you know that the phrase you're looking for occurs only within a specific set of columns, you can limit the search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

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

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

To perform a search using text search options:

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



The **Text Search** dialog box is shown with the following fields and options:

- Search String:** A text input field.
- Search Type:** Radio buttons for **Text** (selected), **Number**, and **Formatted Number**.
- Options:** Checkboxes for **Wild Card Search**, **Case Sensitive**, **Whole Word Match**, **Find First**, and **Start Search on Current Page**.
- Column Search:** A checkbox. If checked, it includes a **Column Index** dropdown (currently set to **<None>**), **From** (1), and **To** (1) fields.
- Generate Report:** A checkbox. If checked, it includes a **Report Description** text area and **Display** fields for **0** lines before and **0** lines after found text.
- Buttons:** **Find**, **Clear**, and **Exit**.

2. Enter your search term in the **Search String** field.
3. For a search type, select any of the following options:

Option	Description
Text	Searches for alphanumeric text.
Number	<p>Searches for numeric values. You can use this option with the following operators to limit the search: =, >, <, =>, and <=. You can use and, or, and to as operators to search for a range of values. For example, enter 2008 and 2009 to find documents containing both 2008 and 2009.</p> <hr/> <p>Caution: If you are searching for an exact number that is part of an alphanumeric text string, then the number will not be found. For example, if you search for 001 and the actual text is ABC001, then the value will not be found.</p> <hr/>

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

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

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

7. Select **Start Search on Current Page** to begin the search on the current page. Clear this option if you want the search to begin on the first page of the document.
When this option is selected, the following occurs when using the **Text Search** toolbar:
 - If you search using only the **Find Previous** button, the pages that follow the current page are omitted from the search.
 - If you search using only the **Find Next** button, the pages that precede the current page are omitted from the search.
8. Select **Column Search** to search within the specified columns. Use any of the following options:

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



Option	Description
To	Enter the character position of the column to end the search in (the rightmost column to be searched). The number in the To field must be greater than or equal to the number in the From field.

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

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



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

Locking Rows

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

Column/Row Locking Toolbar

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

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

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

Notes and Annotations

You can apply a note for another user to see, to call attention to a certain part of the document, or to hide part of a document using notes, staples, annotations, and redactions.

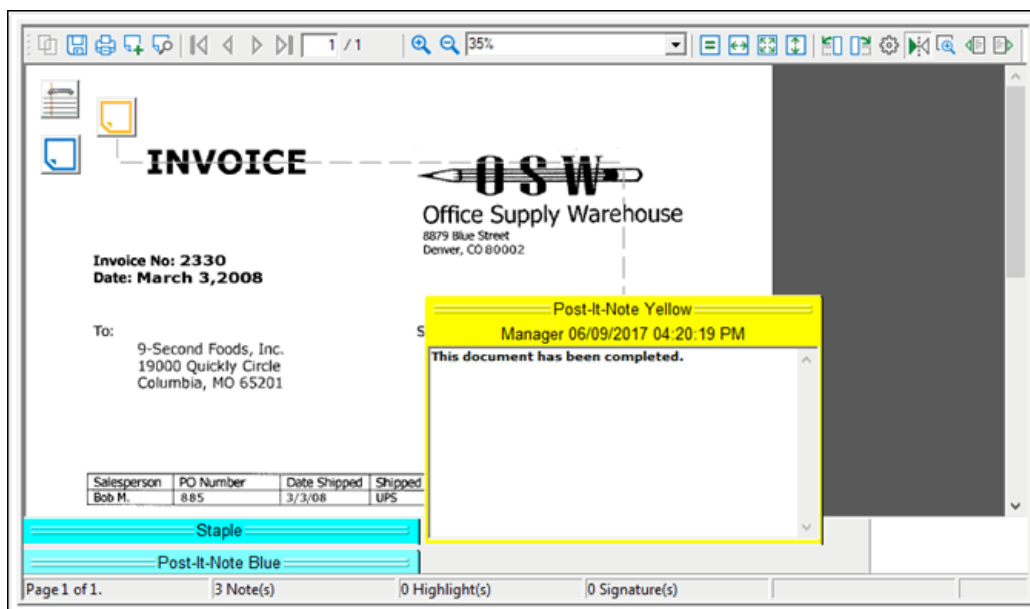
Note: You can view notes on an OLE document (such as a Microsoft Office document or PDF) in the **Notes** pane in the Document Viewer. See [Notes Pane Viewer for OLE Documents on page 178](#). To add, edit, or delete notes on an OLE document, you must use the **Notes** dialog box. See [Notes Dialog Box on page 168](#).

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

Notes Overview

Digital notes can be placed on documents and can be used for many purposes, including the following:

- Emphasizing specific content within the document
- Clarifying or explaining items in a document
- Representing the current state of the document.



Note: The look and feel of the Notes differ depending on whether you are logged in to the ActiveX Client or the HTML Client.

The characteristics of different Note Types are defined by your system administrator:

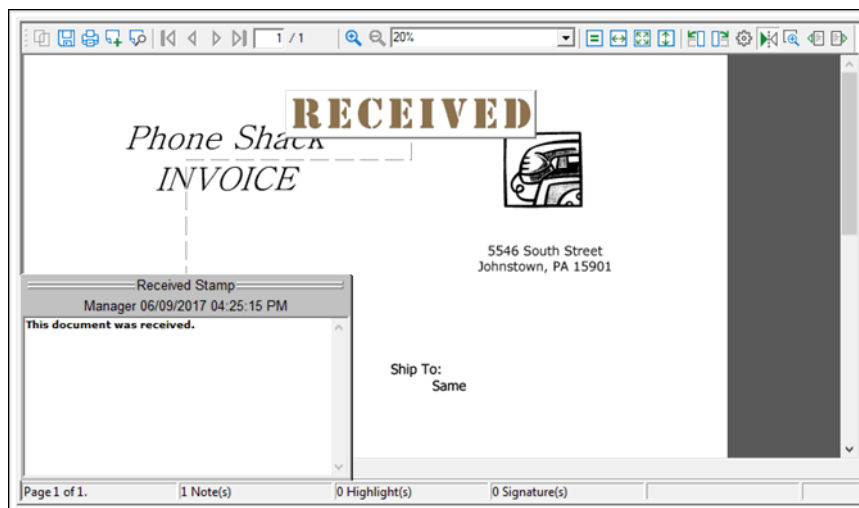
- Some notes may be configured to hide by default. To view any hidden notes, you can display a list of all notes on the document and open any notes from the list.
- Depending on your system setup and user privileges, you may be able to view, modify, delete or add notes to a Document Type, as well as set privacy options.
- You can type text in notes and search for note text in Document Retrieval or Custom Queries. Some notes are configured with default text that is also searchable using Document Retrieval or Custom Queries.
- Typically, notes are configured to show an Auto-Name string in the title bar, identifying the type of note when it is placed on a document. Other typical items in an Auto-Name string are note creation date and time and the name of the user who created the note.

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

Note Icons

Depending on the Note Type configuration and the Document Type, the note may display as an icon, indicating the type of note, such as a **Received** stamp.

Note: Note icons can only be displayed on image and text documents.



Options

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

Notes Toolbar

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

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

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

Click a note tab to read the note or annotation.

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

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

Notes List Toolbar

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

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

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

The following options are available in the Notes List:

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

Date ▲
06/09/2017 04:19:18 PM
06/09/2017 04:22:22 PM
06/13/2017 03:07:08 PM

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

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

View Notes - Open and View Notes or Annotations

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

When you view OLE documents (such as Microsoft Office documents or PDFs) in the Web Client, the number of notes on the document is displayed in the **Note(s)** section of the status bar and in the **Notes** pane of the Document Viewer.

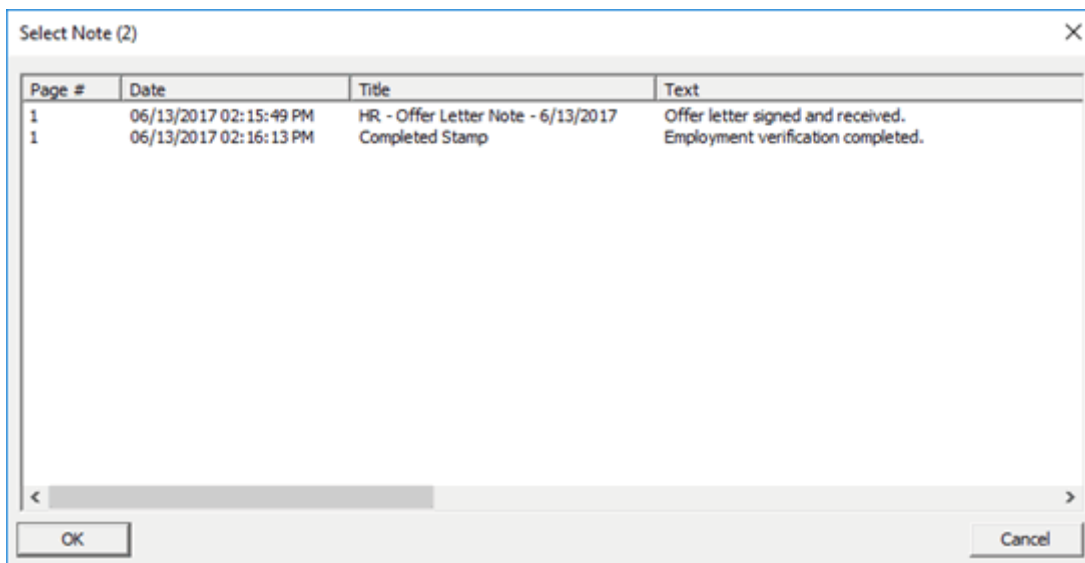
Viewing Notes

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

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

- Right-click an open document and select **Notes | View Notes**.
- Double-click the note in the **Notes List** toolbar.
- Double-click the **Note(s)** section or the **Highlight(s)** section of the status bar.

If a note or annotation exists on a document, it is listed in the **Select Note** dialog box.



The list includes the page where the note is found, the note type, the text of the note, and the date the note was created. Click on the column headings to sort the notes by that column.

Open a note by either selecting the note in the **Select Notes** dialog box and clicking **OK**, or by double-clicking the note in the **Select Note** list.

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

Moving Notes

If you have sufficient privileges to modify a note, you can move the note on a document.

To move a note, click and drag the note icon on the document. The new position is saved when you close or print the document.

Note: If you move a note off of the document, OnBase automatically resets the note position to the top left corner when the document is closed. When the document is opened again, the note is displayed in the top left corner.

Adding Notes, and Editing and Deleting Notes and Annotations

Notes and annotations can be added to, edited, or deleted from documents. Before you start working with Notes and annotations, ensure you have appropriate privileges for adding, editing, or deleting them.

Note: If you have privileges to create a note but do not have privileges to modify it, you can modify the note's text and position only during the same viewing session that you created the note. After you close the document, the note's text becomes read-only. You can reposition the note while viewing the document, but the note will return to its original position when you close the document.

Take note of the following when working with notes and annotations:

- Notes and annotations may contain messages that can be displayed and edited. If you have appropriate privileges, you can delete both notes and annotations from the **Notes** right-click menu.
- Note behavior differs slightly on HTML documents and in the HTML Document Viewer. For information about working with notes in these cases, see [Add a Note in the HTML Document Viewer on page 164](#).
- Annotations are created using the Annotations toolbar. To add an annotation to a document, see the procedure for creating annotations.

Add a Note to a Document

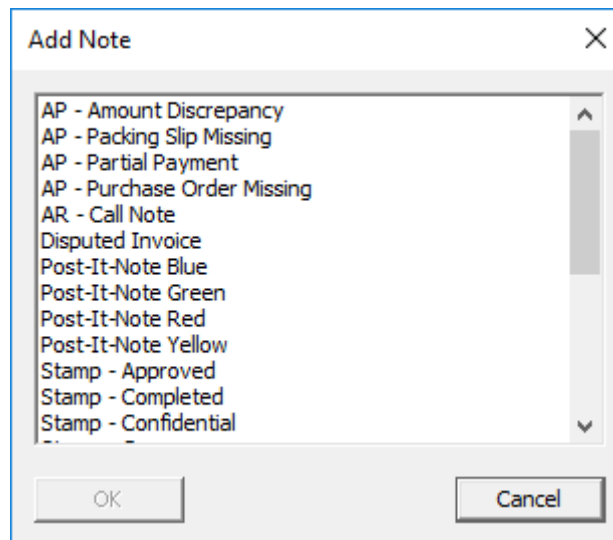
Users with privileges to create notes can add new notes to documents from the **Add Note** dialog box. Users can only add notes of the type(s) that his or her User Group(s) has rights to create.

Note: If you are viewing a document that is locked by Records Management, you can create new notes, but you cannot modify any existing notes.

1. Access the **Add Note** dialog box using either of the following methods:

- Click the **Add Note** button from the Viewer Control toolbar.
- Right-click the document and select **Notes | Add Note**.

The **Add Note** dialog box displays the Note Types that you have rights to create.



2. Select a Note Type and double-click, or click **OK** to add the note.
3. Enter descriptive text and move the note icon to the desired location on the document. The note text and icon, in the position you placed it, is saved automatically.

Add a Note in the HTML Document Viewer

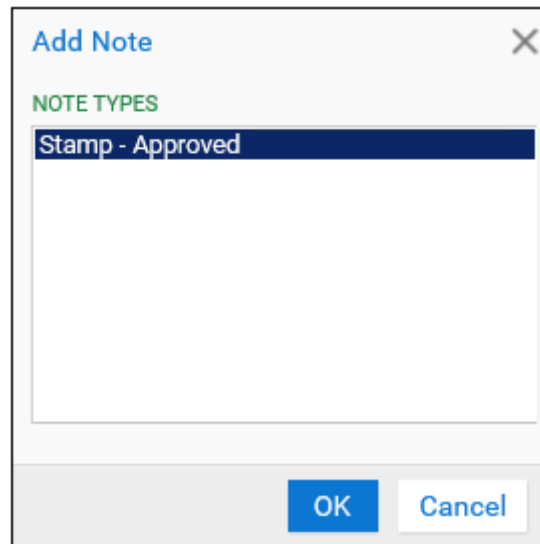
The following steps describe how to add notes to HTML documents and E-Forms and how to add notes in the HTML Document Viewer.

Note: You cannot add annotations to HTML documents.

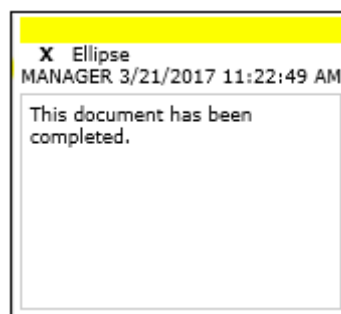
To create a note:

1. Right-click on the document and select **Note | Add Note**, or press **Ctrl + N**. The **Add Note** dialog box lists the available Note Types.

Note: The **Ctrl + N** shortcut is not supported in Chrome.



2. Select a Note Type and double-click, or click **OK** to add the note.
The note is placed in the upper left-hand corner of the document. You can move the note by clicking and dragging the note or note icon on the document. The new position of the note is saved when an action is performed in either the document viewer toolbar or the right-click menu.



3. Edit or type a message in the note's text box. Notes are limited to 250 characters.
 - To minimize a note on an HTML document, double-click the note's title bar. The note's icon is displayed while the note is minimized. To view the note's text, double-click the note's icon.
 - To delete a note from an HTML document, click the **X** in the note's title bar. Click **Yes** to verify that you want to delete the note.
 - To change the note type, right-click the note and select **Change Note Type**. Select a new note type for the note.

Edit Note or Annotation Text

To edit a note, open the note and edit the note contents. Right-click for text-editing options:

Note: If you are unable to access the text box, you may not have user rights to edit the note.

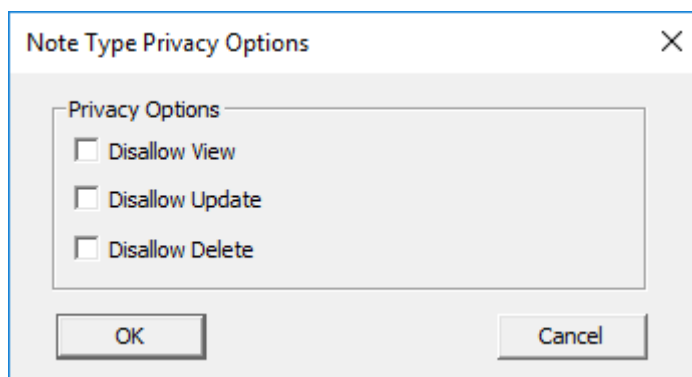
- **Undo** - select to undo the last typed action
- **Cut** - removes selected text and place it on the clipboard
- **Copy** - retains selected text, but place it on the clipboard
- **Paste** - inserts clipboard text in to the active area (last place the mouse was clicked)
- **Delete** - deletes selected text
- **Select All** - selects all text (including default note text)

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

Editing Note Type Privacy Options

Privacy options determine whether other users can view, edit, or delete an individual note you created.

- To edit privacy options on a specific note, do one of the following:
 - Right-click on the note title bar and select **Privacy Options**.
 - Right-click the note in the **Notes List** toolbar and select **Privacy Options**.
 The **Note Type Privacy Options** dialog box is displayed.



Some options may be unavailable depending on how the Note Type was set up by a system administrator.

- Select one of the following options to restrict other users from performing the corresponding action.

Privacy Option	Description
Disallow View	Selecting this check box disallows users from viewing the note.
Disallow Update	Selecting this check box disallows users from updating information on the note.
Disallow Delete	Selecting this check box disallows users from deleting the note.

- Click **OK** when you have selected the desired privacy options.

Deleting a Note

To delete an existing note in the ActiveX Viewer, do one of the following:

- Right-click on the note title bar and select **Delete Note**.
- Right-click the note in the **Notes List** toolbar and select **Delete Note**.

To delete an existing note in the HTML Document Viewer, do one of the following:

- Open the note and click the X in the note title bar.
- Click the **Notes** section on the bottom of the screen. Select the note you want to delete, and then click **Delete Note**.

Click **Yes** when prompted to confirm.

Note: You cannot delete an existing note on a locked document. See your system administrator for information regarding Document Lock Administration.

Changing the Note Type

To change the Note Type of an existing note, navigate to the page of the document the note appears on, and do one of the following:

- Right-click on the note title bar and select **Change Note Type**.
- Right-click the note in the **Notes List** toolbar and select **Change Note Type**.

Note: The **Change Note Type** option in the **Notes List** toolbar is only available when the page the note belongs to is displayed in the Document Viewer. For example, the option is not available if page 1 is displayed, and the note you right-click is on page 2.

Select the new type of note from the **Change Note Type** dialog box and click **OK**.

Note: Depending on system configuration for Note Types, some Note Types may be unavailable from the **Change Note Type** dialog box when using the ActiveX Web Client. See your system administrator for more information.

Notes Dialog Box

If you have appropriate privileges, you can add, view, edit, or delete notes using the **Notes** dialog box. The **Notes** dialog box is available in the following ways:

- Right-click a document in the Document Search Results list, which allows you to work with notes without opening documents.
- Right-click an open image document in the Document Viewer and select **Notes | View Notes** (HTML Web Client only).
- Click the **Note(s)** section of the status bar of the Document Viewer (HTML Web Client only).

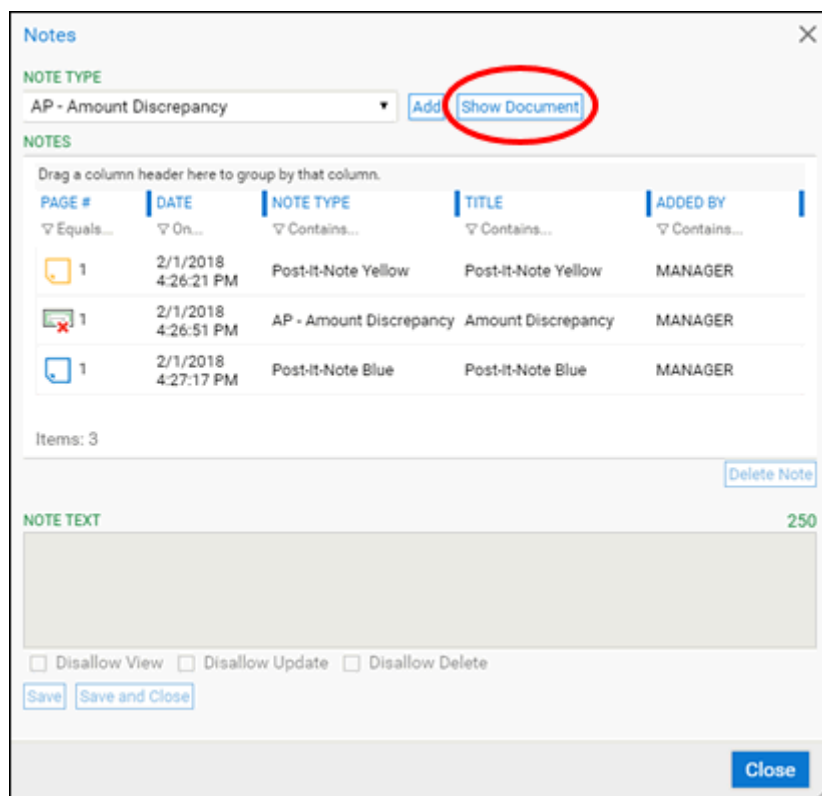
- For OLE documents (such as Microsoft Office documents or PDFs):
 - Select **Edit | Notes** from the OLE viewer menu.
 - Click **Edit** on an open note in the **Notes** pane.
 - Click the **Add Note** button in the **Notes** pane.

The **Notes** dialog box is the only way to add, edit, and delete notes on OLE documents in the Web Client. You can view the number of notes on an OLE document in the **Note(s)** section of the status bar or in the heading of the **Notes** pane in the Document Viewer. See [Notes Pane Viewer for OLE Documents on page 178](#) for more information on viewing notes on OLE documents.

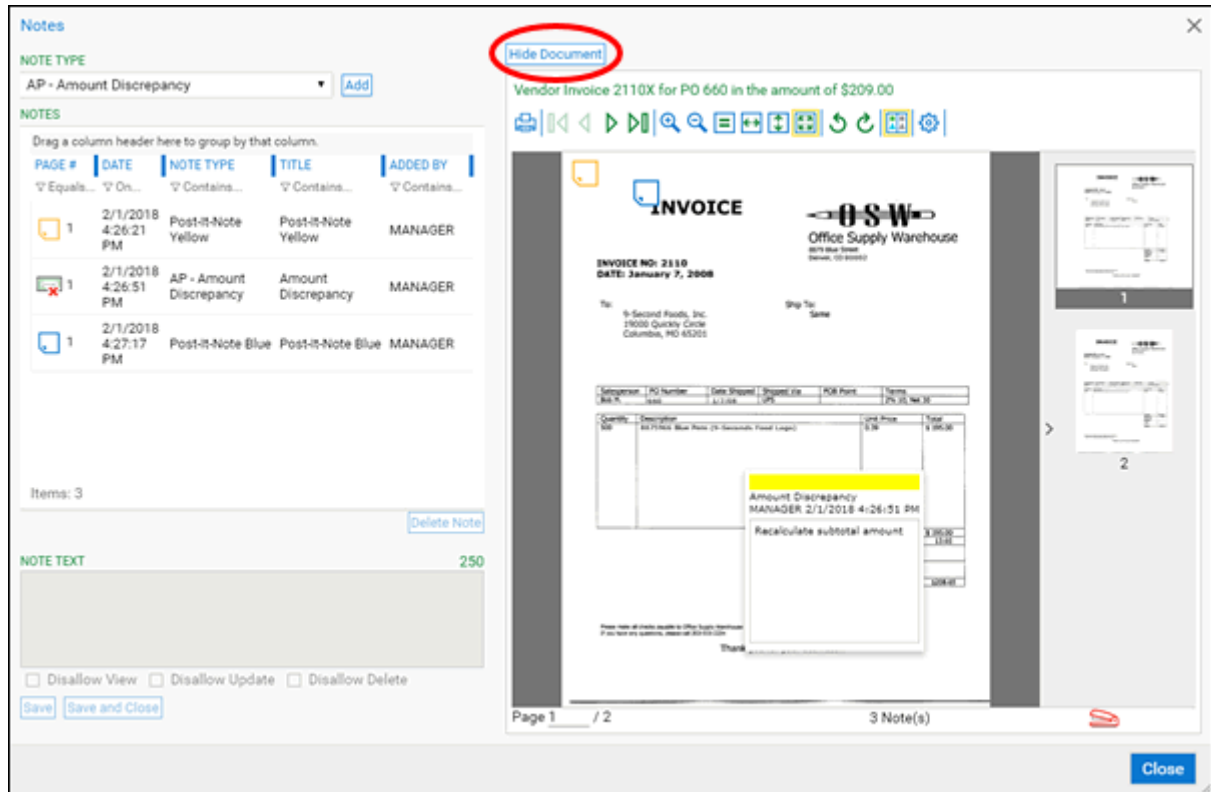
Note: If you have privileges to create a note but do not have privileges to modify it, you can modify the note's text only during the same viewing session that you created the note. After you close the document, the note's text becomes read-only.

Viewing a Document in the Notes Dialog Box

While working in the **Notes** dialog box, you can click the **Show Document** button to view the document alongside the notes in the dialog box.



Click **Hide Document** to hide the document and show only the notes in the dialog box.



Note the following limitations with viewing a document alongside notes in the **Notes** dialog box:

- Notes can only be added to the first page of a multi-page document in the **Notes** dialog box.
- Annotations cannot be drawn on a document being viewed in the **Notes** dialog box.

To accomplish any of these actions, perform them in the Document Viewer, not in the **Notes** dialog box.

Viewing a Note in the Notes Dialog Box

To view a note in the **Notes** dialog box:

1. Open the **Notes** dialog box using one of the following methods:
 - Right-click a document in the Document Search Results list and select **Notes**.
 - Right-click an open document in the Document Viewer and select **Notes | View Notes** (HTML Web Client only).
 - Click the **Note(s)** section of the status bar (HTML Web Client only).

- From an open OLE document (such as a Microsoft Office document or PDF):
 - Select **Edit | Notes** from the OLE viewer menu.
 - Click **Edit** on an open note in the **Notes** pane.

The **Notes** dialog box displays any notes on the document.

The screenshot shows the 'Notes' dialog box with a close button (X) in the top right corner. Below the title bar, there is a 'NOTE TYPE' dropdown menu set to 'AP - Amount Discrepancy', with 'Add' and 'Show Document' buttons to its right. A section titled 'NOTES' contains a table with columns: PAGE #, DATE, NOTE TYPE, TITLE, and ADDED BY. Each column has a filter icon and a dropdown menu. The table lists three notes. Below the table, it says 'Items: 3' and has a 'Delete Note' button. A 'NOTE TEXT' section with a character count of '250' is at the bottom, followed by checkboxes for 'Disallow View', 'Disallow Update', and 'Disallow Delete', and 'Save' and 'Save and Close' buttons. A 'Close' button is in the bottom right corner.

PAGE #	DATE	NOTE TYPE	TITLE	ADDED BY
1	2/1/2018 4:26:21 PM	Post-it-Note Yellow	Post-it-Note Yellow	MANAGER
1	2/1/2018 4:26:51 PM	AP - Amount Discrepancy	Amount Discrepancy	MANAGER
1	2/1/2018 4:27:17 PM	Post-it-Note Blue	Post-it-Note Blue	MANAGER

2. Select a note to view any note text in the **Note Text** box.

Adding a Note in the Notes Dialog Box

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

To add a note using the **Notes** dialog box:

1. Open the **Notes** dialog box using one of the following methods:
 - Right-click a document in the Document Search Results list and select **Notes**.
 - Right-click an open document in the document viewer and select **Notes | View Notes** (HTML Web Client only).
 - Click the **Note(s)** section of the status bar (HTML Web Client only).

- From an open OLE document (such as a Microsoft Office document or PDF), do one of the following:
 - Select **Edit | Notes** from the OLE viewer menu.
 - Click the **Add Note** button in the **Notes** pane.

The **Notes** dialog box is displayed.

Notes

NOTE TYPE

AP - Amount Discrepancy Add Show Document

NOTES

Drag a column header here to group by that column.

PAGE #	DATE	NOTE TYPE	TITLE	ADDED BY
▽ Equals...	▽ On...	▽ Contains...	▽ Contains...	▽ Contains...
1	2/1/2018 4:26:21 PM	Post-it-Note Yellow	Post-it-Note Yellow	MANAGER
1	2/1/2018 4:26:51 PM	AP - Amount Discrepancy	Amount Discrepancy	MANAGER
1	2/1/2018 4:27:17 PM	Post-it-Note Blue	Post-it-Note Blue	MANAGER

Items: 3 Delete Note

NOTE TEXT 250

☐ Disallow View ☐ Disallow Update ☐ Disallow Delete

Save Save and Close Close

- Select a note type from the **Note Type** drop-down list, and click **Add**. The new note is added to the **Notes** list. If the note type is configured to include default text, it is displayed in the **Note Text** field.
- Enter or modify the text of the note in the **Note Text** field. The character counter displays the remaining characters allowed in the note.

4. Select the privacy options to enable or disable for the selected note. The following privacy options are located below the **Note Text** field:

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

Note: Depending on the configuration of the note type, you may be unable to modify some privacy options. For more information on note privacy options, see [Setting Note Privacy Options on page 176](#).

5. Click **Save** to save the note to the document and keep the **Notes** dialog box open, or click **Save and Close** to save the note and close the **Notes** dialog box.

Editing a Note in the Notes Dialog Box

To edit a note in the **Notes** dialog box:

1. Open the **Notes** dialog box using one of the following methods:
 - Right-click a document in the Document Search Results list and select **Notes**.
 - Right-click an open document in the Document Viewer and select **Notes | View Notes** (HTML Web Client only).
 - Click the **Note(s)** section of the status bar (HTML Web Client only).

- From an open OLE document (such as a Microsoft Office document or PDF):
 - Select **Edit | Notes** from the OLE viewer menu.
 - Click **Edit** on an open note in the **Notes** pane.

The **Notes** dialog box is displayed.

PAGE #	DATE	NOTE TYPE	TITLE	ADDED BY
1	2/1/2018 4:26:21 PM	Post-it-Note Yellow	Post-it-Note Yellow	MANAGER
1	2/1/2018 4:26:51 PM	AP - Amount Discrepancy	Amount Discrepancy	MANAGER
1	2/1/2018 4:27:17 PM	Post-it-Note Blue	Post-it-Note Blue	MANAGER

2. Select the note to be edited from the **Notes** list.
3. Edit the text in the **Note Text** box. Right-click for additional text editing options. The character counter displays the remaining characters allowed in the note.
4. Click **Save** to save the note to the document and keep the **Notes** dialog box open, or **Save and Close** to save the note and close the **Notes** dialog box.

Deleting a Note in the Notes Dialog Box

To delete a note from the **Notes** dialog box:

1. Open the **Notes** dialog box using one of the following methods:
 - Right-click a document in the Document Search Results list and select **Notes**.
 - Right-click an open document in the Document Viewer and select **Notes | View Notes** (HTML Web Client only).
 - Click the **Note(s)** section of the status bar (HTML Web Client only).

- From an open OLE document (such as a Microsoft Office document or PDF):
 - Select **Edit | Notes** from the OLE viewer menu.
 - Click **Edit** on an open note in the **Notes** pane.

The **Notes** dialog box is displayed.

Notes

NOTE TYPE

AP - Amount Discrepancy Add Show Document

NOTES

Drag a column header here to group by that column.

PAGE #	DATE	NOTE TYPE	TITLE	ADDED BY
1	2/1/2018 4:26:21 PM	Post-it-Note Yellow	Post-it-Note Yellow	MANAGER
1	2/1/2018 4:26:51 PM	AP - Amount Discrepancy	Amount Discrepancy	MANAGER
1	2/1/2018 4:27:17 PM	Post-it-Note Blue	Post-it-Note Blue	MANAGER

Items: 3 Delete Note

NOTE TEXT 250

☐ Disallow View ☐ Disallow Update ☐ Disallow Delete

Save Save and Close Close

2. Select the note to be deleted from the **Notes** list.
3. Click **Delete Note**. You are prompted to confirm the deletion.
4. Click **Yes** to delete the note.

Note: If you delete a Staple note from the Notes list on one document, the corresponding staple that was attached to the deleted staple is still displayed on the other corresponding document. If you do not want the staple on the corresponding document, you must delete it also.

Setting Note Privacy Options

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

Consider the following when setting note privacy options in the Web Client:

- Users with administrative rights are always able to view, update, and delete all notes and to view and set note privacy options for all notes.
- Only the creator of a note (and any users with administrative rights) can view and set the privacy options of that note.
- If a document is locked, the privacy options for all notes on that document cannot be modified by any other users. This includes any users with administrative rights.
- The privacy options for a note type may be set by default by your system administrator.

In the Web Client, note privacy options are set in the **Notes** dialog box. To set note privacy options:

1. Open the **Notes** dialog box using one of the following methods:
 - Right-click a document in the Document Search Results list and select **Notes**.
 - Right-click an open document in the Document Viewer and select **Notes | View Notes** (HTML Web Client only).
 - Click the **Note(s)** section of the status bar (HTML Web Client only).

- From an open OLE document (such as a Microsoft Office document or PDF):
 - Select **Edit | Notes** from the OLE viewer menu.
 - Click **Edit** on an open note in the **Notes** pane.

The **Notes** dialog box is displayed.

Notes

NOTE TYPE

AP - Amount Discrepancy Add Show Document

NOTES

Drag a column header here to group by that column.

PAGE #	DATE	NOTE TYPE	TITLE	ADDED BY
1	2/1/2018 4:26:21 PM	Post-it-Note Yellow	Post-it-Note Yellow	MANAGER
1	2/1/2018 4:26:51 PM	AP - Amount Discrepancy	Amount Discrepancy	MANAGER
1	2/1/2018 4:27:17 PM	Post-it-Note Blue	Post-it-Note Blue	MANAGER

Items: 3 Delete Note

NOTE TEXT 250

☐ Disallow View ☐ Disallow Update ☐ Disallow Delete

Save Save and Close Close

2. Select the note that you want to modify from the **Notes** list.
3. Select the privacy options to enable or disable for the selected note. The privacy options are located below the **Note Text** field. The following privacy options are available:

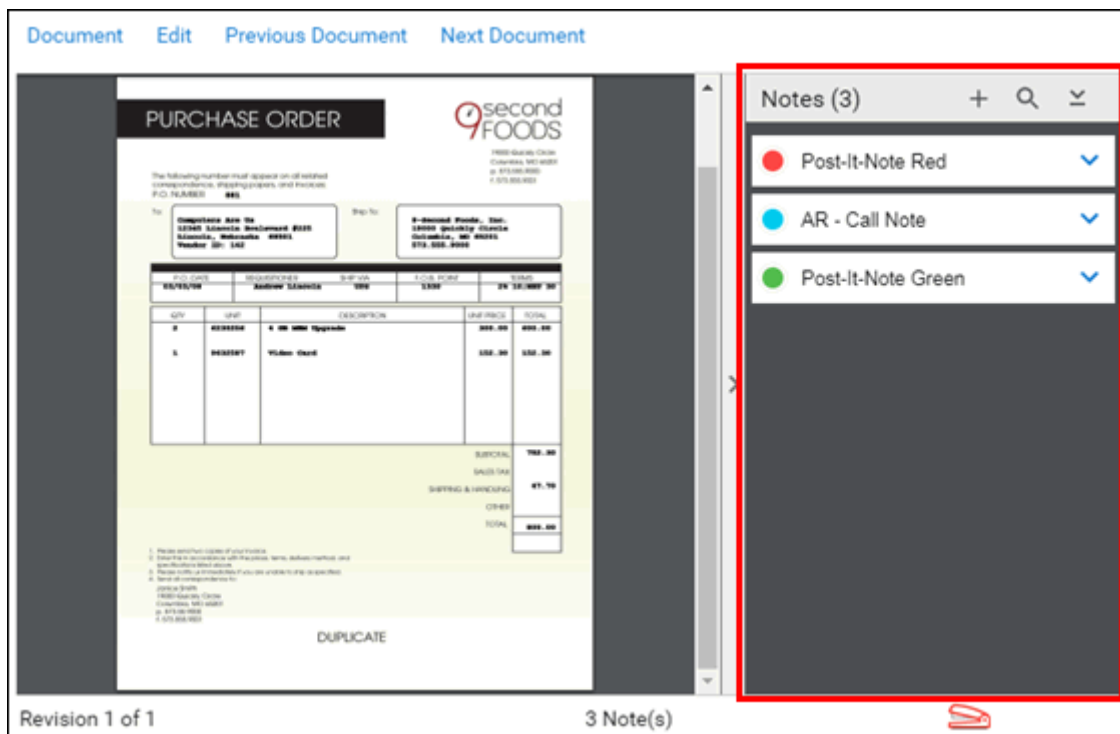
Note Privacy Option	Description
Disallow View	Prohibits all other users from viewing the note. Note: If this option is selected, other users can still successfully search for text in the note using the OnBase Client, but they will not be able to view the note.
Disallow Update	Prohibits all other users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

4. Click **Save** to save the note to the document and keep the **Notes** dialog box open, or **Save and Close** to save the note and close the **Notes** dialog box.

Notes Pane Viewer for OLE Documents

When viewing a document in the OLE document viewer, the notes on the document are listed in the **Notes** pane of the viewer. The OLE document viewer is used to display OLE documents such as Microsoft Office documents and PDF documents (depending on your configuration).

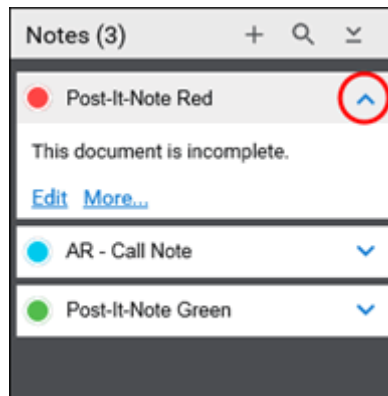
The **Notes** pane displays all of the notes on the document, and each note's color is displayed next to the name of the Note Type. The total number of notes is also displayed in the heading of the pane.



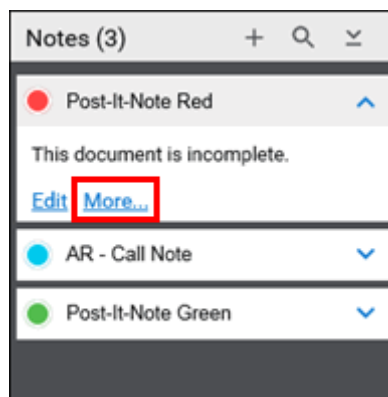
Note: The **Notes** pane only allows you to view the notes on the OLE document. To add, edit, or delete notes, you must use the **Notes** dialog box by clicking **Edit** on a note in the **Notes** pane, or clicking the **Note(s)** section of the status bar. For more information on using the **Notes** dialog box, see [Notes Dialog Box on page 168](#).

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

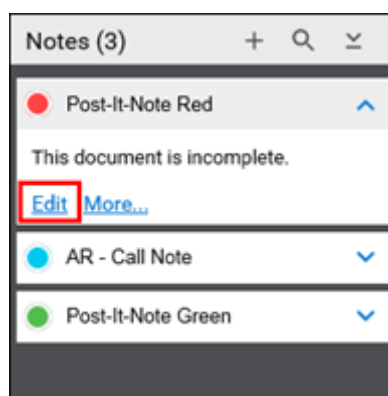
- To expand a note and view its contents, click the note in the **Notes** pane. Click the heading of the note again to collapse the note.



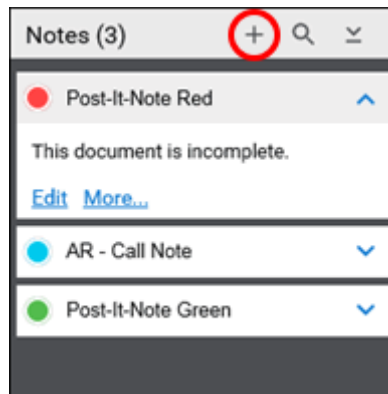
- To view additional information on a note, expand it and then click **More**. The note's icon, creation date and time, and creator's user name are displayed.



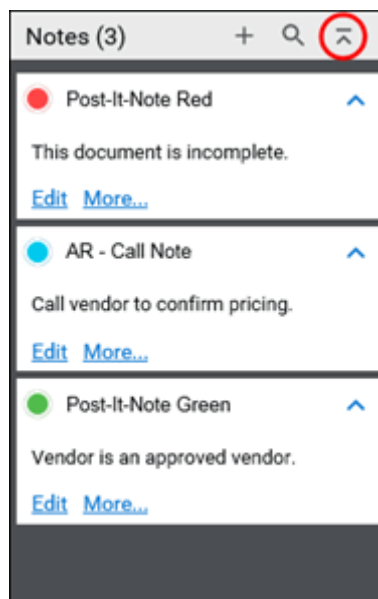
- To edit a note, expand the note and click **Edit**. The **Notes** dialog box is displayed, which allows you to edit the note.



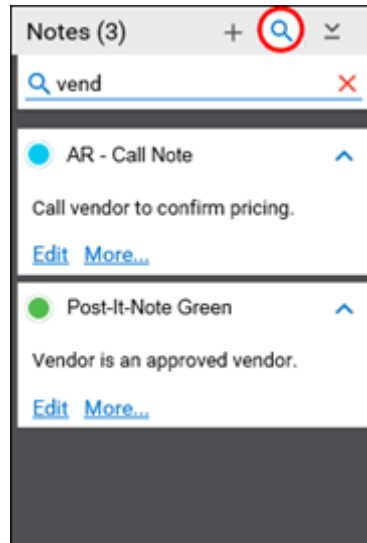
- To add a new note, click the **Add Note** button at the top of the **Notes** pane. The **Notes** dialog box is displayed, which allows you to create a new note.



- To expand all notes, click the **Expand All** button at the top of the **Notes** pane. Click the button again to collapse all notes.



- To filter the list of notes, click the filter button at the top of the **Notes** pane and enter search terms into the **Note Text** field. The list is filtered to display only the notes that contain matching text. Click the red **X** to remove the filter.



- To hide the **Notes** pane, click the handle next to the pane.

Document Edit Previous Document Next Document

PURCHASE ORDER

9second FOODS
1988 Quaker Circle
Columbia, MO 65201
617.555.8888
F 573.888.8883

The following number must appear on all related correspondence, shipping papers, and invoices:
P.O. NUMBER: 885

To: **Complete Box 10**
12345 Science Boulevard #200
Science, Missouri 65001
Phone: 555-1234

Ship To: **9-second Foods, Inc.**
12345 Quaker Circle
Columbia, MO 65001
617.555.8888

ITEM	QUANTITY	UNIT PRICE	DESCRIPTION	UNIT PRICE	TOTAL
1	1000000	4.00	1000 Upgrade	4000.00	4000.00
2	1000000	3.00	1000 Upgrade	3000.00	3000.00

SUBTOTAL: 7000.00
SALES TAX: 47.70
SHIPPING & HANDLING: 0.00
OTHER: 0.00
TOTAL: 7047.70

1. Please send two copies of your invoice.
2. Please invoice in accordance with the pricing terms, delivery method, and quantity shown above.
3. Please include a bill of materials if you are unable to ship as specified.
4. Send all correspondence to:
9second Foods
1988 Quaker Circle
Columbia, MO 65201
617.555.8888
F 573.888.8883

DUPLICATE

Revision 1 of 1

3 Note(s)

Notes (3)
+ -

- Post-It-Note Red
- AR - Call Note
- Post-It-Note Green

Click the handle again to expand the **Notes** pane.

Document Edit Previous Document Next Document

PURCHASE ORDER

9second FOODS
1988 Quaker Circle
Columbia, MO 65201
617.555.8888
F 573.888.8883

The following number must appear on all related correspondence, shipping papers, and invoices:
P.O. NUMBER: 885

To: **Complete Box 10**
12345 Science Boulevard #200
Science, Missouri 65001
Phone: 555-1234

Ship To: **9-second Foods, Inc.**
12345 Quaker Circle
Columbia, MO 65001
617.555.8888

ITEM	QUANTITY	UNIT PRICE	DESCRIPTION	UNIT PRICE	TOTAL
1	1000000	4.00	1000 Upgrade	4000.00	4000.00
2	1000000	3.00	1000 Upgrade	3000.00	3000.00

SUBTOTAL: 7000.00
SALES TAX: 47.70
SHIPPING & HANDLING: 0.00
OTHER: 0.00
TOTAL: 7047.70

1. Please send two copies of your invoice.
2. Please invoice in accordance with the pricing terms, delivery method, and quantity shown above.
3. Please include a bill of materials if you are unable to ship as specified.
4. Send all correspondence to:
9second Foods
1988 Quaker Circle
Columbia, MO 65201
617.555.8888
F 573.888.8883

DUPLICATE

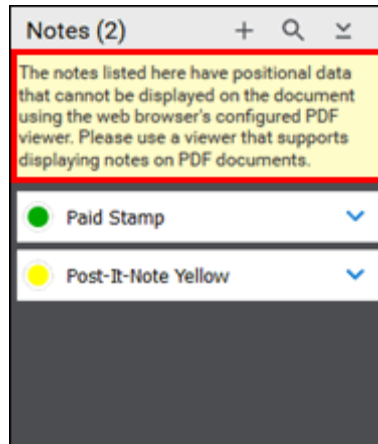
Revision 1 of 1

3 Note(s)

Notes (3)
+ -

- Post-It-Note Red
- AR - Call Note
- Post-It-Note Green

- If any notes have specific positions on a PDF document, the **Notes** pane contains a notice explaining that the document viewer cannot display the position of these notes on the PDF. To display the positions of notes and note icons on a PDF document, use the Web Client PDF viewer instead of the web browser's PDF viewer. See your system administrator for more information.



Annotations

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

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

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

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

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

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

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

Annotations Toolbar






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

For more information, see [Creating an Annotation on page 184](#).

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

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

Button	Description
	<p>Toggle Redaction lets you draw black or white rectangles over a portion of the document. The color of the redaction is determined by the adjacent drop-down list. You remain in redaction creation mode until you click the Toggle Redaction button again.</p> <p>This option is available for image documents only. You must have sufficient privileges to modify the document.</p>
	<p>Save Redactions saves any redactions that you have added to the document but not yet saved.</p> <p>You can save redactions only if the following requirements are met:</p> <ul style="list-style-type: none"> • You have sufficient privileges to modify the current document. • The document is configured to allow redactions. • The document has an image or text report format.
	<p>Toggle Annotation enables you to add one or more annotations to the document by selecting the annotation(s) from the adjacent drop-down list of available annotation types. You remain in annotation addition mode until you click the Toggle Annotation button again.</p>

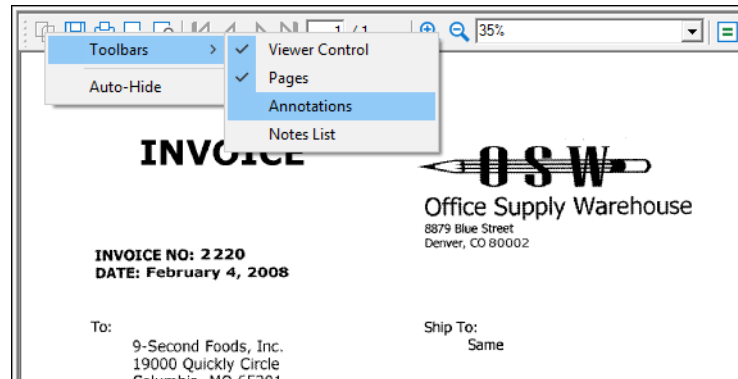
Note: Not all File Formats allow annotations. See your system administrator if the **Toolbars | Annotations** right-click option is not available.

Creating an Annotation

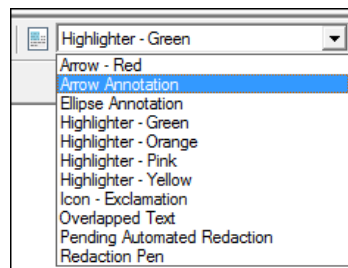
If you have sufficient privileges, you can create annotations on text and image documents using the Annotations toolbar.

Annotation behavior differs slightly in the HTML Web Client. For more information about working with annotations in these cases, See [Creating Annotations in the HTML Document Viewer](#) on page 186.

1. Ensure that the Annotations toolbar is displayed on the Document Viewer.
If the toolbar is not displayed, enable it by right-clicking the document or the Document Viewer and selecting **Toolbars | Annotations**.



2. In the Annotations toolbar, select the type of annotation from the drop-down list. By default, the drop-down list displays the most recent annotation you applied to a document with the same file format.



Note: Depending on your system's configuration, redaction annotations may be available from the annotations drop-down list. Redaction annotations are not supported for creating permanent redactions in the OnBase Web Client or DocPop. To create a permanently redacted document, see [Creating a Redaction](#) on page 189.

Note: You can use redaction annotations to print redacted documents on an ad hoc basis. To remove redaction annotations after printing a document, see [Deleting a Note](#) on page 167.

3. Enable the selected annotation by clicking the **Toggle Annotation** button.

Tip: You can also create annotations using the Rubber Band feature if **Draw Annotation On Rubberband** is selected in Viewer Options. When this options is selected, you do not have to click the **Toggle Annotation** button to enable the annotation. To create the annotation using the Rubber Band feature, press **Ctrl** as you click and drag the pointer over the document. For more information, see [Options Button - OnBase Viewer Options on page 176](#).

4. Using the pointer, define the location and size of the annotation by clicking and dragging the pointer over the document. Release the mouse button when finished to display the annotation.

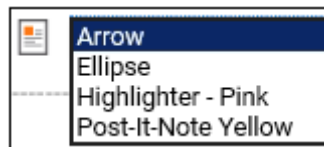
Note: Ensure that the annotation is large enough to be visible. Annotations are required to be a certain size before they can be created and saved.

Creating Annotations in the HTML Document Viewer

The HTML Document Viewer allows you to place annotations on text and image documents.

To create and place an annotation on a text or image document:

1. In the Document Viewer toolbar, select the type of annotation from the drop-down list:



2. Enable the selected annotation by clicking the **Toggle Annotation** button:



3. Using your mouse pointer, define the location and size of the annotation by clicking and dragging the pointer over the document. Release the mouse button when finished to display the annotation.

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

Moving and Resizing Annotations in the HTML Document Viewer

If you have appropriate privileges, and if an annotation is configured to be movable, you can move and resize annotations after they have been placed on a document.

To move an annotation on a document, do one of the following:

- Click and drag the annotation to a new location.
- Double-click the annotation, then use the arrow keys on the keyboard to move the annotation to a new location.

Tip: When using the arrow keys on the keyboard to move an annotation, press and hold the **Ctrl** key while pressing the arrow keys to move the note more quickly.

To resize an annotation on a document, do the following:

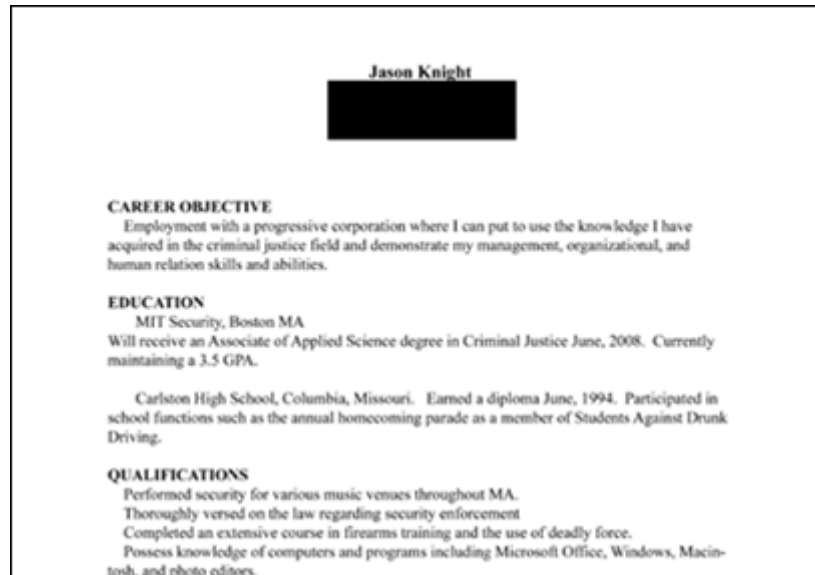
1. In the Document Viewer, double-click the annotation you want to resize. The annotation is selected.



2. Click and drag the edges or corners of the annotation until the annotation is the correct size. The mouse pointer changes to indicate the direction in which the annotation can be resized.
3. When you are finished resizing the annotation, click a different area of the screen to deselect the annotation.

Redactions

A redaction is a special kind of annotation used to hide confidential information on an image or text document. A redaction is a permanent black or white rectangle that obscures an area of the document. Redactions can be added in both HTML and ActiveX environments.



Redactions can be created and saved on image documents, text documents, and Image Rendered PDFs that are part of Document Types configured to allow redactions. See your system administrator to verify whether a Document Type has been configured for redactions.

A redaction cannot be deleted (or undone) once it has been saved. When a redaction is saved, the redacted document is stored either as a new document in another Document Type or as a revision of the current document. How the redacted document is stored depends on your system's configuration.

Note: Depending on your system's configuration, redaction annotations may be available from the annotations drop-down list. These annotations are supported only in the OnBase Client and Unity Client and should not be used for creating permanent redactions in the Web Client.

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

Creating a Redaction

You can apply and save redactions to a document if all of the following conditions are met:

- You have sufficient privileges to modify the document.
- The document's file type supports redactions. Only image and text files can be redacted.
- The document's Document Type is configured to allow redactions.

Note: You can print redacted documents on an ad hoc basis even if their Document Types are not configured for redactions. Apply the redactions, and then print the document. Then, close the document without saving the redactions.

1. Click the **Toggle Redaction** button from the Annotations toolbar.



2. From the redaction drop-down list, select whether you want to create a black redaction or a white redaction. If you select **Black Redaction**, the redacted area will be defined by a black, opaque rectangle. If you select **White Redaction**, the redacted area will be defined by a white, opaque rectangle.
3. Using your mouse, define the location and size of the redaction by clicking and dragging the pointer over the area you want to redact. Repeat for each area you want to redact.
4. Save the redacted image by clicking the **Save Redaction** button.
 - OnBase displays the message **Your redaction has been saved successfully**, indicating that the redacted document has been created. Depending on your system's settings, this redacted document is saved to another Document Type (the original document may also be deleted in this scenario), is saved as a revision of the current document, or replaces the original document.

Note: If your system is configured to save the redacted document as a revision, you may lose annotations or notes that were applied to the original document. See your system administrator for questions regarding redaction settings.

- If OnBase indicates that the redaction could not be saved, the Document Type may not be configured for redactions.
- If the document is closed or refreshed before one or more redactions have been saved, a message box prompts you to **Save Redactions** or **Close**. To save all created redactions, click **Save Redactions**. To discard them, click **Close**.

Note: In the HTML Viewer, if you switch between Overlay and Non-Overlay modes, a message is displayed indicating that the redaction will be removed.

Staples

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

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

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

When using staples, consider the following:

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

Working with Staples

Staple behavior differs slightly depending on the type of documents being stapled. Most image documents can be stapled from open documents, but certain document types (such as OLE documents or E-Forms) must be stapled using the stapler icon. For information about working with notes in these cases, see [Stapling Documents with the Stapler Icon on page 191](#).

Stapling Documents from Open Documents

To staple one or more open documents to another open document:

1. Open the initial document to which other documents will be stapled.

Note: The initial document cannot be an OLE document or E-Form. To staple an OLE document or E-Form to another document, see [Stapling Documents with the Stapler Icon on page 191](#).

2. Open the secondary document(s) that you want to staple to the initial document.

Note: To staple documents, you must have both images open in separate Document Viewer windows. If you are working with documents in the Web Client, you can right-click a document from a Document Search Results list and select **Open in New Window**.

3. Right-click and drag each secondary document onto the initial document.
A staple icon is displayed on the primary document.



A back staple icon is displayed on the secondary document.



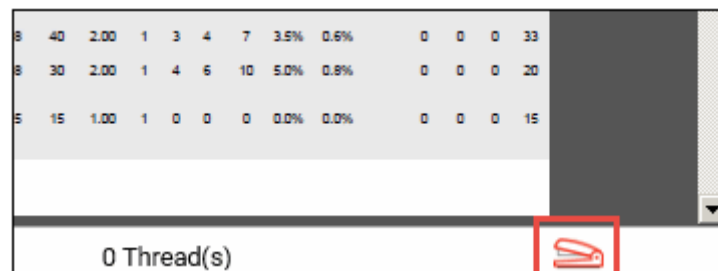
Stapling Documents with the Stapler Icon

The following steps describe how to staple documents using the stapler icon, which is only available in the HTML Web Client and for certain document types (such as OLE documents or E-Forms) in the ActiveX Web Client.

1. Open the initial document to which other documents will be stapled.
2. Open the secondary document(s) that you want to staple to the initial document.

Note: To staple documents, you must have both images open in separate Document Viewer windows. If you are working with documents in the Web Client, you can right-click a document from a Document Search Results list and select **Open in New Window**.

3. Click and drag the stapler icon (located in the status bar) from each secondary document onto to the primary document.

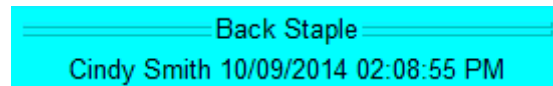
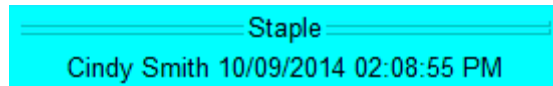


An icon indicating that the document has been stapled is displayed on all associated documents.



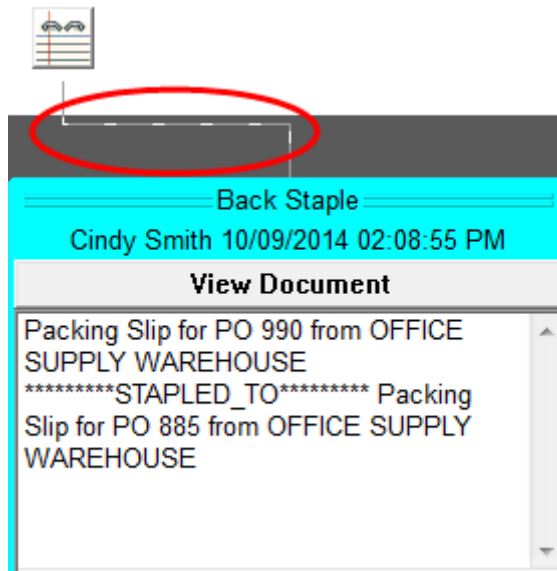
Viewing Stapled Documents

Staple notes are displayed at the bottom of the Document Viewer window as note tabs. A Staple note tab indicates whether the document is the primary document or the secondary document by labeling the note as **Staple** or **Back Staple**, respectively.



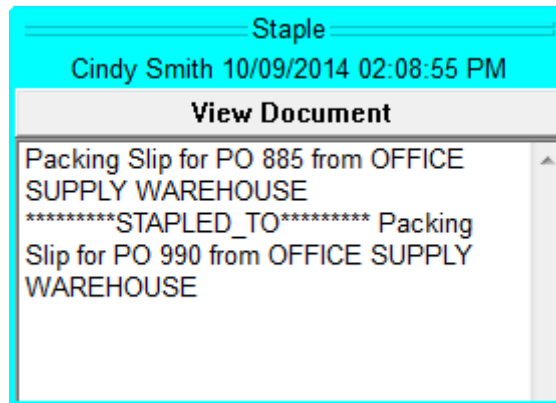
Note: Note labels may vary depending on the Auto-Naming conventions for your system.

When the note is open, a dotted line connects the Staple note tab to the Staple note icon on the document.



To view stapled documents:

1. Click the Staple note tab at the bottom of the Document Viewer window. In the HTML Web Client, double-click the staple note icon on the document. The note window is displayed:



Staple notes can also be accessed via the **Notes** dialog box.

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

Moving Staple Notes

To move the Staple note icon on the document, click and drag the icon to the proper place. The new position of the Staple note icon is automatically saved.

Editing Staples

1. Click the Staple note tab at the bottom of the Document Viewer window. The note window is displayed.
In the HTML Web Client, double-click the staple note icon on the document, or edit the note from within the Notes dialog box.
2. Edit or add any text as needed.

Deleting a Staple

1. Right-click on the staple status bar and select **Delete Note**.
In the HTML Web Client, select the staple note within the Notes dialog box.
You are asked if you are sure you want to delete the note.
2. Click **Yes**. The staple is removed.

Note: If you delete a staple on one document, the corresponding staple on the document that was attached to the deleted staple is still displayed. If you do not want the staple on the corresponding document, you must delete it also.
