OnBase®

Foundation EP5

Integration for Accela

Reference Guide

Includes:

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User Guide

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Copyright

Document Name .... Integration for Accela

Department/Group .... Documentation

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Overview

Accela Automation is a software package from Accela, Inc. (http://www.accela.com/) that is used by government organizations for permitting, planning, licensing, asset management, emergency response, public health, and public works. The software has basic document attachment capabilities, but Accela recommends that customers add an enterprise ECM solution, such as OnBase, for enterprise-scale document imaging and document management. Accela has defined and implemented a standard interface for ECM solutions to work with the Accela Automation product. This is described in the **EDMS-Technical Bulletin** document, provided by Accela.

The Integration for Accela Automation adds OnBase document imaging and document management to Accela Automation. No custom code is required.

Applications

The OnBase Integration for Accela Automation uses Accela's native interface to allow users to instantly and securely retrieve relevant documents directly from the Accela Automation web application, or from other Accela products such as Accela Wireless and Accela Mobile Office. OnBase virtually eliminates uncontrolled and unsecured document access, accidental removal of documents, and ensures that Accela-related documents are appropriately available throughout the enterprise.

Additional OnBase modules can be used to achieve a more robust solution:

- Application Enabler allows Accela Automation to interact with OnBase scanning and indexing, as well as generate E-Forms and bar codes.
- Integration for Esri allows documents associated with the same physical assets that are managed through Accela, such as water and sewer lines, roads, bridges, and land parcels, to be directly associated and searchable using Esri applications.
- Workflow allows automatic routing of documents through required business processes, such as site plans or engineering drawing reviews.
- Document Composition allows automatic generation of form letters, such as planning and permitting deficiencies, as well as business license renewal notifications.
- Records Management provides secure control of documents that are required to meet record retention policies mandated at the local, state, and federal levels.

Licensing

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

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

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

Simplified Licensing

In addition to a base package license for standard OnBase functionality, the Integration for Accela add-on license is required to access standard Integration for Accela Automation functionality.

Legacy Licensing

The Integration for Accela Automation requires the following licenses:

- Integration for Accela Automation
- Web Server
- Client

Note: A Client license is required to view documents.

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

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Requirements

The following sections outline requirement information specific to Integration for Accela Automation in OnBase Foundation EP5.

General Requirements

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

- Databases Supported
- Hyland Software - Microsoft Service Pack Statement
- Third-Party Software Compatibility
- Windows User Account Control Statement

The following requirements apply to Integration for Accela Automation. The version of the OnBase Web and Applications Servers must match the version of Integration for Accela installed.

Note: Integration for Accela Automation is a 64-bit application and requires a 64-bit application pool. The **Enable 32-Bit Applications** setting for the Integration for Accela Automation application pool must be set to **False**.

Third-Party Software Requirements

Accela Automation is required to use the Integration for Accela Automation.

Licensing

See Licensing on page 2for licensing requirements.

Upgrade Considerations

The following information should be noted when upgrading Integration for Accela Automation deployments.

General Considerations

Integration for Accela Automation also requires the OnBase Web Server, which may have additional upgrade considerations.

Logging Information

Logging information can be viewed in the Diagnostic Console. Enable logging in the Accela web.config file

Pre-Installation

Before installing the Integration for Accela Automation, ensure that you have configured the following:

- OnBase Web Server. This is required to view documents via DocPop.
- OnBase Application Server. This is required to interact with Accela Automation.
- OnBase Service Account

Note: For information about creating and configuring an Service Account, see the System Administration documentation.

Installation

To install the Integration for Accela Automation:

1. Obtain the **Web Service** folder and **AccelaServiceProvider.dll** from your solution provider.
2. Place the **AccelaServiceProvider.dll** file in your OnBase Application Server's **bin** folder.
3. Copy the contents of the **Web Service** folder to the desired location for running the Accela web service. This can be on the same server as the OnBase Application Server or a different server that has network access to the OnBase Application Server.

Note: It is recommended the folder be named **AccelaService**.

4. Using Internet Information Services (IIS) Manager, create an application for the Accela web service using the **AccelaService** folder.

Note: Integration for Accela Automation is a 64-bit application and requires a 64-bit application pool. The **Enable 32-Bit Applications** setting for the Integration for Accela Automation application pool must be set to **False**.

5. Ensure that you can reach the AccelaService by opening your web browser and navigating to **http://[server name]/AccelaService/AccelaService.asmx**.

6. Open the AccelaService **web.config** file.

Note: Do not open the web.config in a binary editor, such as Microsoft Word, because binary editors can introduce invalid characters to the file that cause the service to fail.

7. Locate the **AccelaConfigPath** key.
8. Modify the **value** attribute to be the full path to the **OnBaseAccelaCfg.xml** file.
9. Save and close the AccelaService **web.config** file.

Troubleshooting

The following sections describe common errors and how to resolve them.

Cannot Import Large Documents

Issue — Users are unable to import large documents into OnBase using Accela's document creation functionality.

Resolution — Increase the **maxAllowedContentLength** and **maxRequestLength** settings in the web.config file of the Accela Service to allow for the largest documents that need to be imported.

1. Locate the **web.config** file for the Accela Service.

Tip: The folder containing the Accela Service can be located using the IIS Manager.

2. Open the web.config file in a plain-text editor, such as Notepad.

Note: Do not open the web.config in a binary editor, such as Microsoft Word, because binary editors can introduce invalid characters to the file that cause the service to fail.

3. Locate the **httpRuntime** element in the web.config file.
4. Update the value of the **maxRequestLength** attribute to increase the maximum file size allowed. This value is in kilobytes (KB).

Tip: Due to additional system information that is sent with requests, the maximum size setting should be slightly above the largest file size that needs to be imported. For example, if the largest file you need to import is no greater than 40 MB, set the maximum file size to 41 MB to ensure that a 40 MB file can still be imported.

5. Update the value of the **executionTimeout** attribute to allow for the increased file size, if necessary. This value is in seconds.
6. Locate the **requestLimits** element under the **system.webServer** element.

7. Update the value of the **maxAllowedContentLength** attribute to match the size configured for the maxRequestLength. This value is in bytes.

Note: The sizes configured for the **maxRequestLength** and **maxAllowedContentLength** attributes must be equal, but note that maxRequestLength is in kilobytes and maxAllowedContentLength is in bytes.

8. Save and close the web.config file.
9. Restart the Accela Service in order for the changes to take effect.

Note: The **maxRequestLength** and **executionTimeout** settings may also need to be increased for the OnBase Application Server. For details, see the **Application Server** module reference guide.

Contacting Support

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

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

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

Integration for Accela Automation Best Practices

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

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

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

Design/Implementation

The following best practices should be followed by installers when designing and implementing an Integration for Accela Automation solution:

1. Work with the customer's Accela administrator and end user representative to determine what interactions will be expected with OnBase from the Accela product. Based on those interactions, consider the impact on implementation by asking the following questions:
   a. How will documents be archived into OnBase?
      - If they will always use the Accela import feature, will additional Keyword Values need to be added once the documents are in OnBase?
      - If they will come into OnBase directly (for example, via scanning), how will the Accela CAP ID or CAP ALT ID Keyword Values be added?

   b. Will the Integration for Accela Automation be expected to display documents that are in an existing OnBase system?
      - Do the existing documents already have a Keyword Type to match the Accela CAP ID or CAP ALT ID. If so, is it the same Keyword Type for all Document Types to be retrieved through Accela?
      - If existing documents are to be retrieved, but do not have a Keyword Type for the CAP ID or CAP ALT ID, consider the steps needed to add that Keyword Type.
2. For each OnBase Document Type that will be associated with Accela, add the following two Keyword Types:
   - Accela Record ID

- Accela Record Alt ID

These Keyword Types are mapped to the CAP ID and CAP ALT ID, and can be configured as hidden Keyword Types. The CAP ALT ID is often labeled in Accela based on the context of the record; for example, “Permit Number” in relation to Permitting or “Case Number” in relation to Code Enforcement. In order to achieve this same context friendly labeling in OnBase, use a Workflow system action to copy the value from the Accela Record Alt ID into another Keyword Type that is more user friendly.

3. Prior to implementing the Integration for Accela Automation, meet with a member of the Accela team who is familiar with the Accela EDMS solution. This person can provide advice to the customer for configuring the Accela application to best match the OnBase Document Type configuration. Discuss the following:
   a. Will all users have access to the **Documents** tab in Accela Automation?
   b. Which of the following functions will be available from the **Documents** tab?
      - New
      - Download
      - Delete (this deletes documents from OnBase; it does not send the document to Document Maintenance)
   c. What will the Accela Document Group and Category values be?
4. The following standard choices are available in Accela and can help improve performance:
   - GLOBAL_SEARCH_BUILD_INDEX_ENTITIES

     With this enabled for documents, the documents will be indexed for global search.
   - Document
     - This standard choice status is disabled by default to ensure sync from EDMS.
     - When enabled, the sync of documents will not occur regardless of other standard choice selections. If enabled, the Accela documents tab will not show documents arriving from EDMS.
   - Disable_Tab_Record_Count
     - When enabled, Accela will not load the document count until the Accela documents tab is clicked. This means number by documents count will not display on the record in Accela; however, when the documents tab is clicked, the EDMS will be called and the document list will be rebuilt.
     - This choice can have positive performance impacts on Accela since the Accela application will not need to rebuild the document list and send it to the Accela indexer each time a record is clicked within Accela.

Installation

The following are considered best practices for installing the Integration for Accela Automation:

- Name the Accela web service folder **AccelaService**.
- Install the web service on the OnBase Application Server.

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Configuration Overview

Integration for Accela Automation configuration involves:

- Configuring the OnBase Document Types, Keyword Types, and Custom Queries that will be used when interacting with Accela. These OnBase Document Types, Keyword Types, and Custom Queries will be mapped to the Accela Fields that are required for each Accela Entity Type.

Note: The **GetVersion Method** is available and will return _NULL_ as the value.

A single Keyword Type must be mapped to an Accela Field for document retrieval, and for document import. That same Keyword Type (or Keyword Types if using a combination of Accela Fields) must be used across all Document Types that will be associated with Accela.

Tip: For information on configuring OnBase Document Types, Keyword Types, and Custom Queries, see the **System Administration** module reference guide or **Configuration** module help files.

- Defining the **datasource** in the web.config file of the OnBase Web Server. The datasource is the friendly name of the connection string OnBase uses to communicate with the database and must be defined in one the following elements of the web.config file, depending on which Pop integration the environment uses:
  - Hyland.Web.DocPop
  - Hyland.Web.PdfPop
  - Hyland.Web.FormPop
  - Hyland.Web.FolderPop
- Completing the required Accela configuration steps, as described in the **EDMS-Technical Bulletin** document from Accela.

  This document includes instructions for configuring an EDMS that points to the OnBase Accela Web Service via a URL. Accela Automation can then be configured to call the web service methods supplied by OnBase, which creates the integration between both systems.

  Available Accela Automation methods are:
  - Create
  - Delete
  - List
  - Get

Note: The **Update** method is not currently supported by the Integration for Accela Automation.

- Configuring the **OnBaseAccelaCfg.xml** file, as described in OnBaseAccelaCfg.xml on page 12.

OnBaseAccelaCfg.xml

The **OnBaseAccelaCfg.xml** file contains Integration for Accela Automation configuration information. Information stored in this file includes how the connection to the OnBase Application Server is made, as well as how data is sent from the Accela Web Service to OnBase. Document import and document retrieval configuration information is also stored in this file.

To configure **OnBaseAccelaCfg.xml** settings:

1. Open **OnBaseAccelaCfg.xml** in a plain-text editor.

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

2. In the **AccelaAgency** element, replace **[AGENCY NAME]** with the Agency name sent by Accela. All messages from Accela Automation include an Agency name.

3. In the **ConnectionInformation** element:
   a. Replace the value of the **datasource** attribute with the name of the OnBase data source.
   b. Replace the value of the **hylandserviceurl** attribute with the URL of the OnBase Application Server.
4. In the **Authentication** element:
   a. Replace the value of the **username** attribute with the user name of the OnBase Service Account.
   b. Replace the value of the **password** attribute with the password for the OnBase Service Account.
5. In the **DocumentViewer** element:
   a. Replace the value of the **url** attribute with the URL to the DocPop *.aspx page.
   b. Replace the value of the **type** attribute with the type of DocPop viewer to use:
      - **activex**: use the ActiveX DocPop viewer
      - **html**: use the HTML DocPop viewer
6. In the **LoggingOptions** element, set the value of the **displaytrace** attribute to specify whether logging information is displayed on the **Errors** tab in the Diagnostics Console:
   - **TRUE**: logging information is displayed on the Errors tab
   - **FALSE**: logging information is not displayed on the Errors tab
7. In the **ImportDocuments** element, map Accela Category field values to OnBase Document Types using the following XML elements and attributes:

Note: The **Accela Category**, **Entity**, and **Keyword** descriptions are not case sensitive.

XML Element	Attribute	Description
AccelaCategory	**name**	Enter the name of the Accela Category. This name is defined by Accela. **Tip:** The Accela configuration team can help you match the Accela Category name to the OnBase Document Type name.

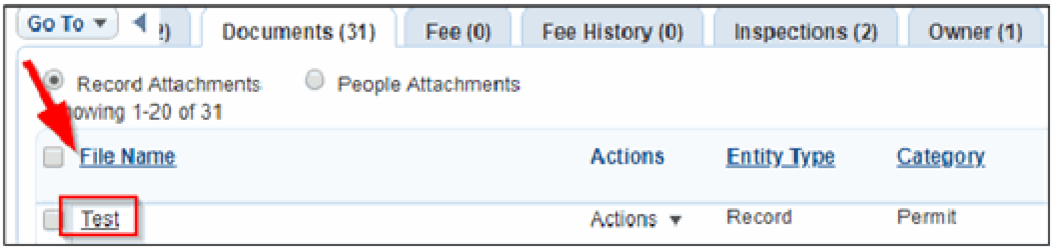
XML Element	Attribute	Description
AccelaEntity	**name**	Enter the name of the Accela Entity. Valid values are: • ASSET • ASSETCA • CAP • EVIDENCE • INSPECTION • LICENSEPROFESSIONAL • PARCEL • PART
	OnBaseDocType	Enter the name of the OnBase Document Type that is used for the given Accela Entity.
Keywords/ Keyword	**AccelaField**	The **Keywords** element is used to map the Keyword Types to Accela Fields. Each Keyword Type is defined with its own **Keyword** child element. Enter the name of the Accela Field to map to the OnBase Keyword Type. This value corresponds to the name of the Accela Entity defined above. The **[name of entity] ID** field must be defined for each entity. The **[name of entity] ALT ID** field is optional. For example, the **CAP** Accela Entity must have the **CAP ID** defined in this section. The **CAP ALT ID** field is optional. Valid values are: • **ASSET ID** and **ASSET ALT ID** • **ASSETCA ID** and **ASSETCA ALT ID** • **CAP ID** and **CAP ALT ID** • **EVIDENCE ID** and **EVIDENCE ALT ID** • **INSPECTION ID** and **INSPECTION ALT ID** • **LICENSEPROFESSIONAL ID** and **LICENSEPROFESSIONAL ALT ID** • **PARCEL ID** and **PARCEL ALT ID** • **PART ID** and **PART ALT ID**
	OnBaseKeywordName	Enter the OnBase Keyword Type name that is populated with the value in the Accela Field.

XML Element	Attribute	Description
CommonElements /Keywords/ Keyword	**AccelaField**	The **CommonElements** element is used to map the common Keyword Types to the corresponding Accela Fields. It contains a **Keywords** child element. Each Keyword Type is defined with its own **Keyword** grandchild element. Enter the name of the Accela Field to map to the OnBase Keyword Type. Valid values are: • CATEGORY • DESCRIPTION • FILENAME
	OnBaseKeywordName	Enter the OnBase Keyword Type name that is populated with the value in the Accela Field.

8. In the **RetrieveDocuments** element, define the Custom Query that is used for retrieving documents.
   a. In the **AccelaEntity** child element, update the value of the **Name** attribute to the name of the Accela Entity used to retrieve documents. This name is defined in the corresponding **AccelaEntity** tag.
   b. In the **CustomQuery** child element, update the value of the **Name** attribute to the name of the OnBase Custom Query used to retrieve documents.
   c. In the **Keyword** child element, update the value of the **AccelaField** attribute to the name of the Accela Field used by the Custom Query.
   d. In the **Keyword** child element, update the value of the **OnBaseKeywordName** attribute to the OnBase Keyword Type that is populated by the Accela Field used by the Custom Query.
   e. When documents are imported to OnBase directly and not uploaded through Accela, in order for the category column to be displayed, the CategoryMapping child element must be configured.

If the selected OnBase Keyword Type used for the OnBaseKeywordName is unavailable or blank, then it will use the DefaultValue attribute. The DefaultValue attribute will be the literal string value to be displayed.

f. In the FileNameMapping child element, update the value of the OnBaseKeywordName attribute to an OnBase Keyword Type. This will be used in the File Name column in Accela.



If a File Name is not mapped, the Auto-Name value for the document type is used.

9. Save and close **OnBaseAccelaCfg.xml**.

System Interaction

Application Enabler

Application Enabler can be used with the Integration for Accela Automation to enable more fields in the Accela Automation interface for retrieval from additional OnBase Document Types and Keyword Types. Application Enabler can also be used for additional imaging and indexing needs.

Note: A functionality test is required to confirm which fields are available to Application Enabler.

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Usage

Use of the Integration for Accela Automation module is seamless. Documents are archived into OnBase from Accela and are then available for retrieval.

OnBase functionality is available within the Accela Automation interface from the following locations on the **Documents** tab:

Interface Location	OnBase Functionality
New	Click to import a document into OnBase using Accela's document creation functionality.
Download	Click to save the OnBase document to a local or network drive and display it in its native viewer without any OnBase functionality. For example, a text document might display in Notepad.
Delete	Click to delete the document from OnBase. **Caution:** Documents are not sent to Document Maintenance after clicking **Delete**. They are permanently deleted from OnBase.
File Name	Click to display the OnBase document in the OnBase Document Viewer.

Supported File Types

The following file types can be viewed and imported into OnBase using the Integration for Accela Automation module:

- bmp
- doc
- docx
- gif
- html
- jpeg
- mht
- msg
- pdf
- png
- ppt
- pptx

- rtf
- tif
- tiff
- txt
- xls
- xlsx
- xml

Appendix: Viewing Documents

This section is a guide to using the viewer that displays OnBase documents retrieved through Accela Automation.

The following topics illustrate and describe how to use the ActiveX document viewer. Feature availability depends on your user privileges and the type of viewer you are using. Not all features are available from the HTML document viewer.

Viewing Documents from Accela

You view OnBase documents by clicking the appropriate document link in the document list that is displayed in the Accela application. The document is opened in the OnBase document viewer.

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.

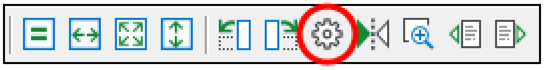
Documents generated by external applications, such as Microsoft Office and PDF documents, that are stored in their native formats may open externally in their native applications, or they may open within the browser window using viewers based on those applications. See the application help for information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

Options Button - OnBase Viewer Options

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



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

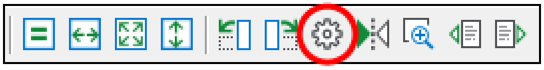
- Thumbnail size
- Thumbnail zoom behavior
- Auto-scroll preferences
- Whether to show icons on a document page for notes and annotations
- Rubberband behavior
- Zoom region preferences
- Blank page display preferences
- Connection timeout preferences

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

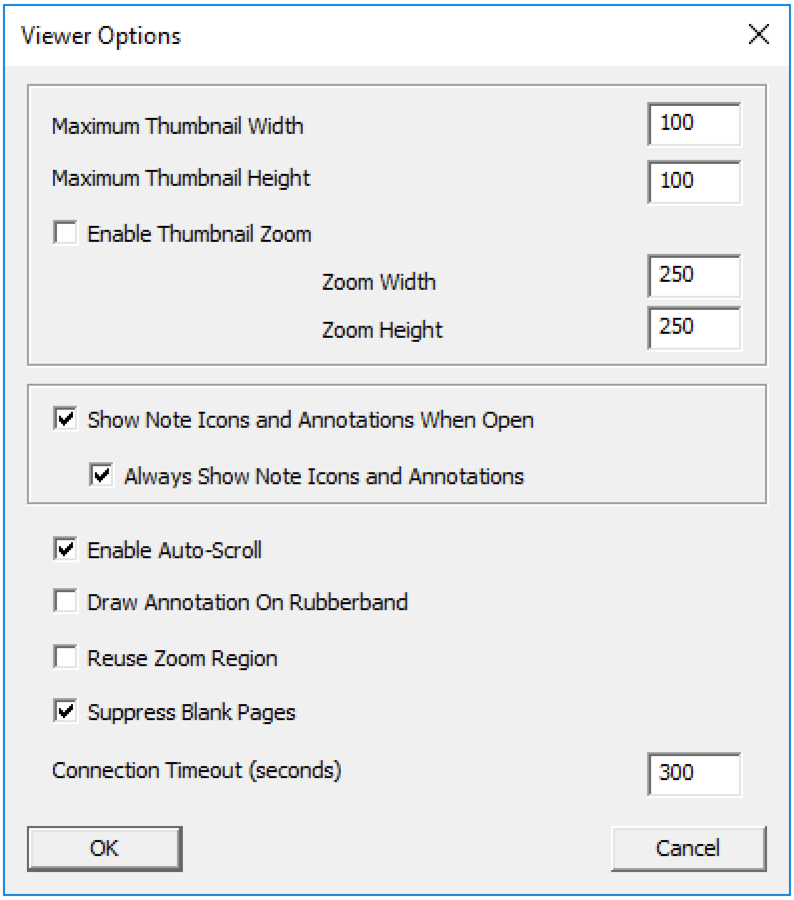
Changing Thumbnail Size

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

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



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



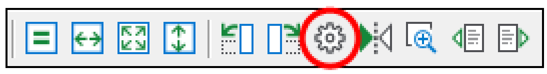
2. In the **Maximum Thumbnail Width** field, type the number of pixels that defines the maximum width for thumbnails. For example, the default setting is **100**, which means that no thumbnail in the **Pages** toolbar will ever be wider than 100 pixels. You can specify any width from 32 pixels through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

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

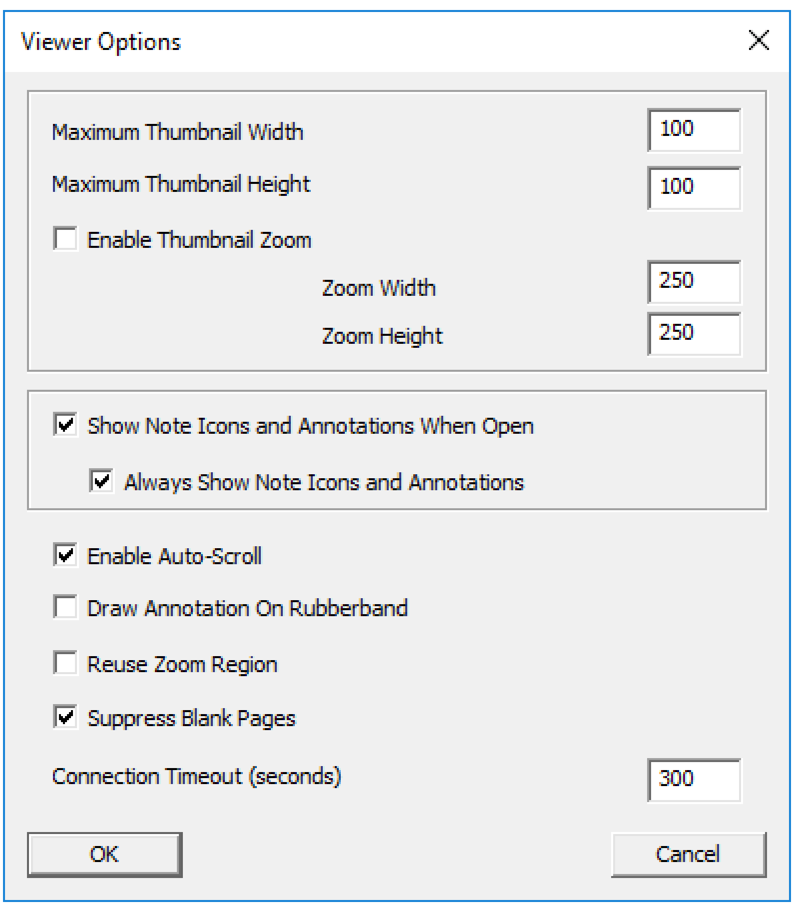
Change Zoomed Thumbnail Size

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

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



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

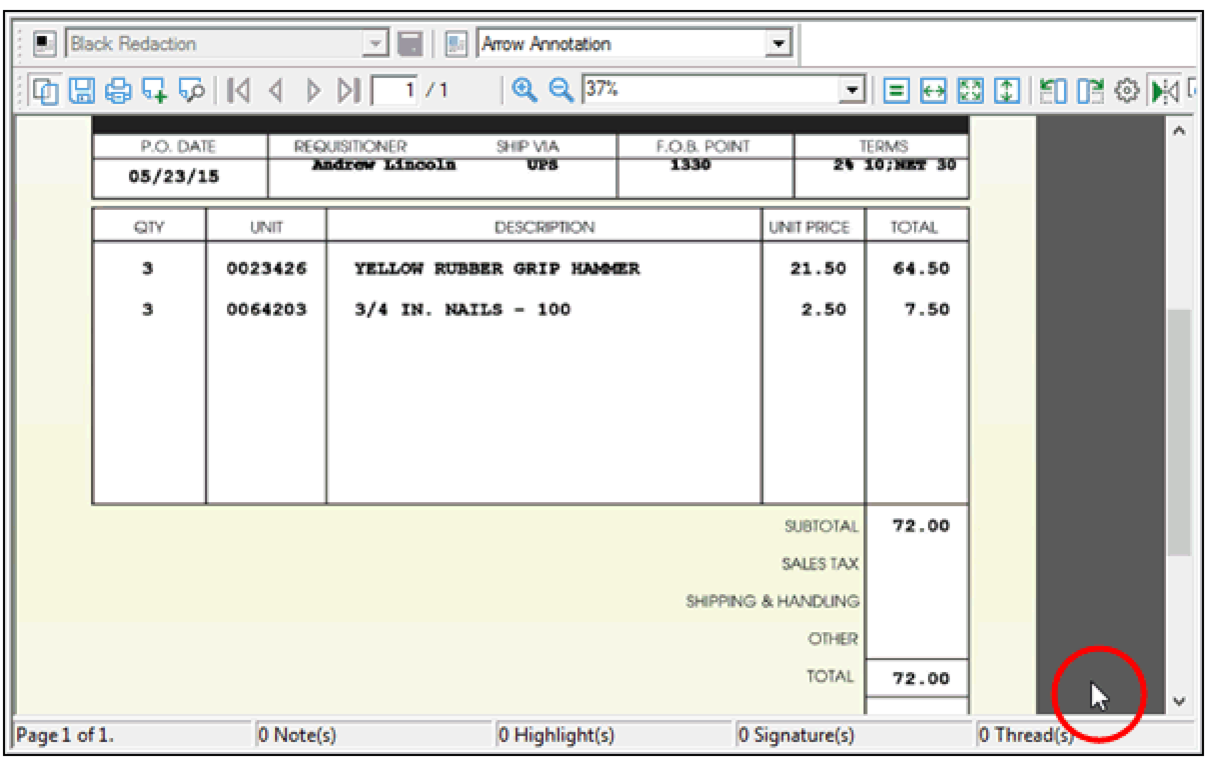


2. Select the **Enable Thumbnail Zoom** check box if you want thumbnails to be magnified to the specified dimensions whenever you place your pointer over them. Clear the check box if you want thumbnails to remain the same size.
3. In the **Zoom Width** field, type the maximum width in pixels of the zoomed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

Enable Auto-Scroll

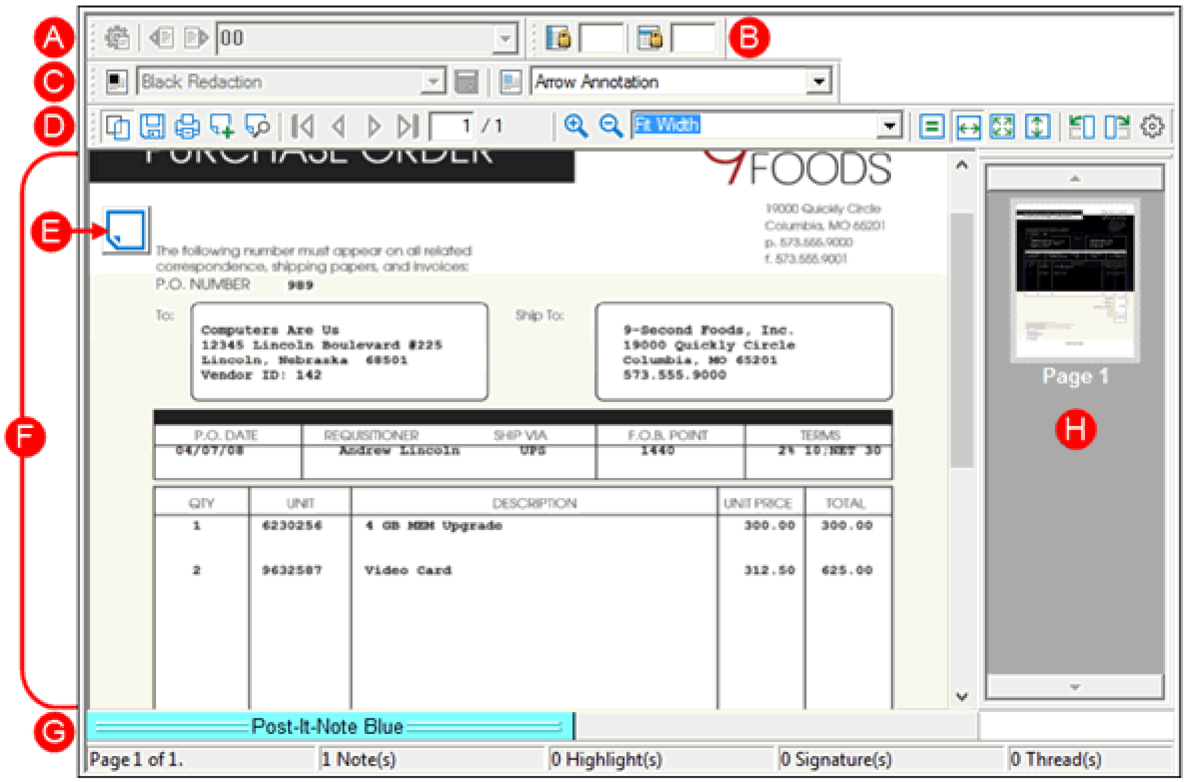
Select this option to enable auto-scrolling on documents. Auto-scrolling allows you to place the pointer at the edge of the viewer and scroll through the document vertically or horizontally. For example, to scroll down, you would place the pointer at the bottom of the viewer.

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



Display Options for Notes and Annotations

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



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

Show Note Icons and Annotations When Open

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

Always Show Note Icons and Annotations

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

Draw Annotation On Rubberband

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

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

Retaining the Zoom Region from Page to Page

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

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

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

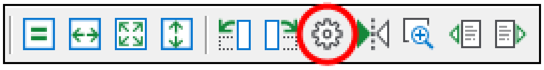
Suppressing Blank Pages

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

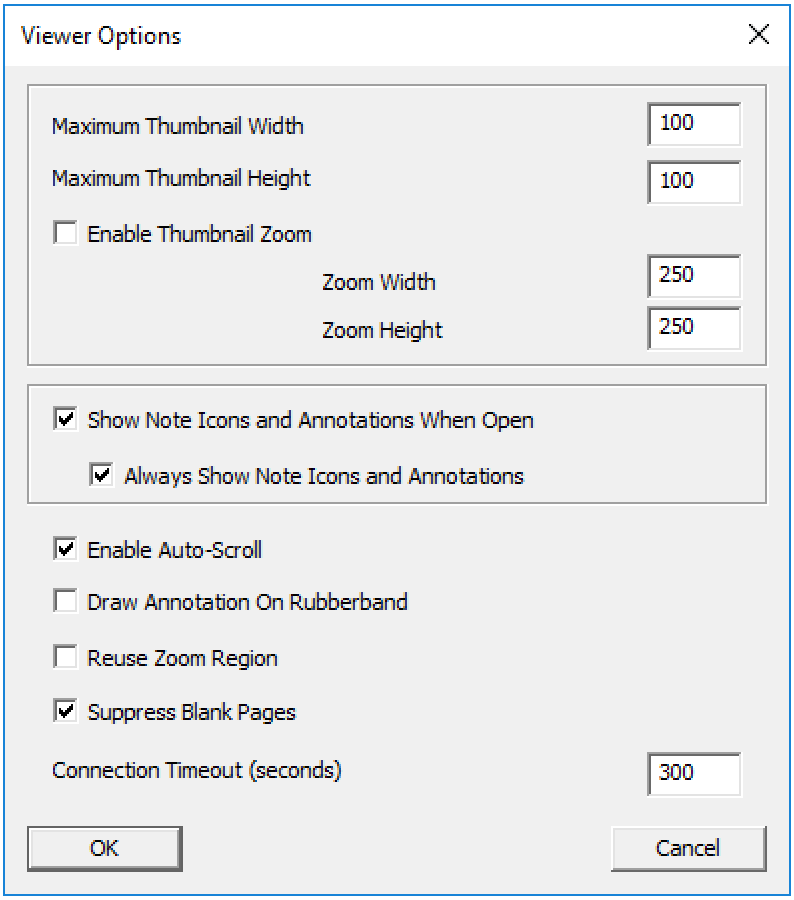
Note: The **Suppress Blank Pages** function is not supported in the ActiveX Web Client.

To suppress blank page thumbnails in the Document Viewer:

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



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

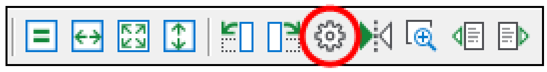


2. Select the **Suppress Blank Pages** check box. Clear the check box if you want the blank pages to remain in the **Pages** toolbar.
3. Click **OK** to save your changes. OnBase immediately changes the display of the thumbnails in the viewer based on whether or not the **Suppress Blank Pages** option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

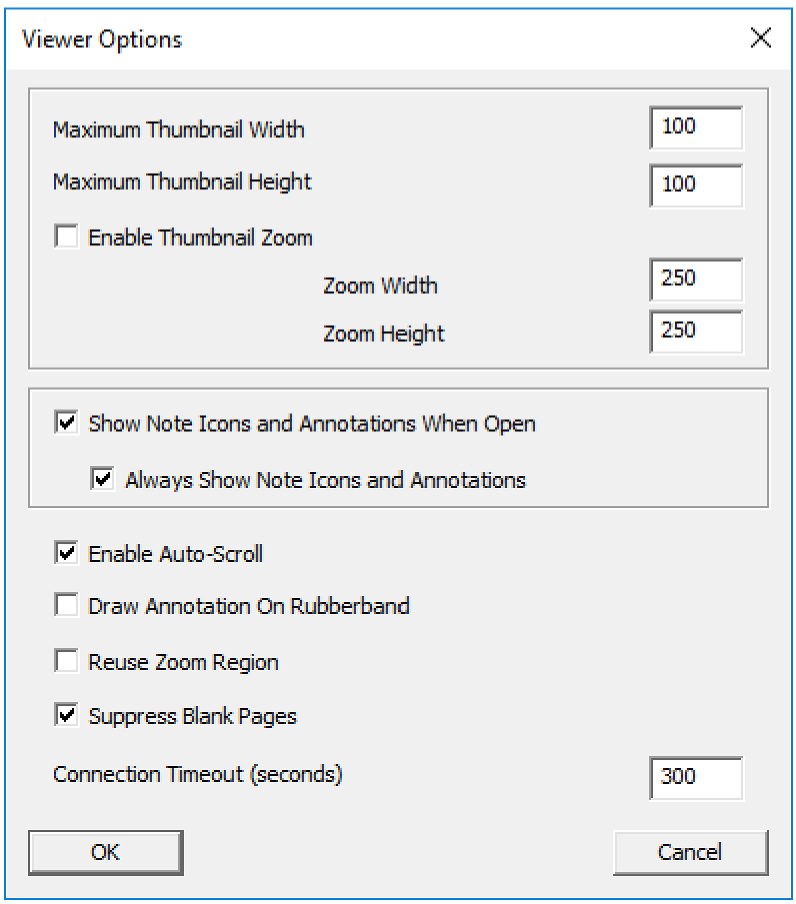
Adjusting Connection Timeout

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

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



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



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

Navigate

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

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

Printing Documents

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

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

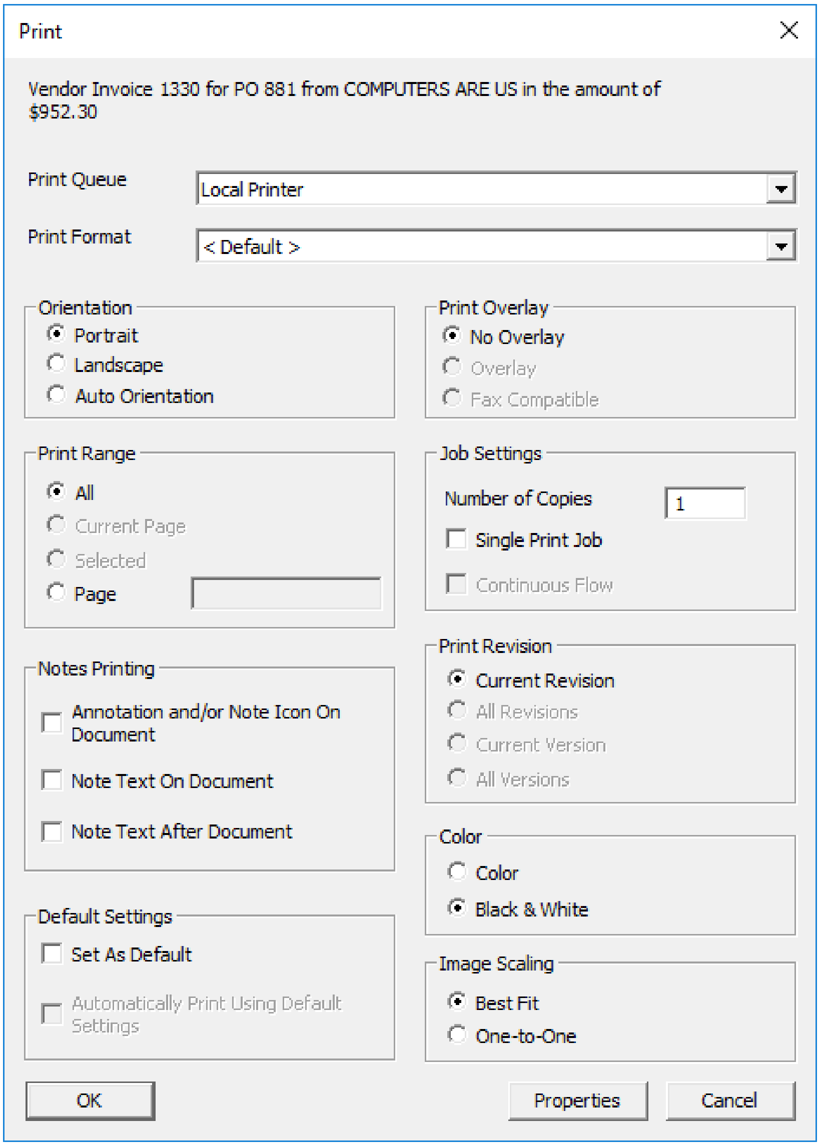
- From an open OLE document, select **Document | Print**.

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

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

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

The **Print** dialog box is displayed.



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

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

Option	Description
Print Queue	Select the desired network print queue (mapped to the desired printer) from the **Print Queue** drop-down list. Print queues manage the manner in which documents are printed by defining the method for generating the print request, as well as the type of printer that will be used to print the document when it is sent to that queue. Available Print Queues are defined by your system administrator. **Note:** To send a document to a Print Queue in the HTML Web Client, see Sending Documents to Print Queues in the HTML Web Client on page 106.
Print Format	The **Print Format** drop-down list displays configured print formats, which determine the appearance of the selected documents. When you select a print format, its settings are used as defaults in the print dialog. The print format default is the print format associated with the Document Type of the first document selected for printing. If a batch is selected or no print format is associated with the Document Type, the setting is **<Default>**. To override the print format defaults, change the settings in the print dialog box. When printing multiple items with varying document types, select **<Use Doc Type Default>** from the **Print Format** drop-down list. This selection prints each document using the print format configured for its Document Type. **Note:** The **<Use Doc Type Default>** option is not available when printing Document Types that do not have a default print format.
Orientation	**Portrait**: Prints the top of the page on the shortest side of the paper. **Landscape**: Prints the top of the page on the longest side of the paper. **Auto Orientation**: Prints the page according to its dimensions. For example, if the height of the page is greater than the width, **Portrait** is used. If the width of the page is greater than the height, **Landscape** is used. For multi-page images, the orientation is determined on a page-by-page basis. **Note:** These options do not apply to Microsoft Word documents and are not available for PDF documents. **Note:** This setting is not respected when printing XML documents. XML documents are printed using the default orientation setting of the printer.

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

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

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

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

3. Click **OK**.

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

E-Forms not Printing Correctly

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

Print or Copy Sections of a Document Using Rubber Band

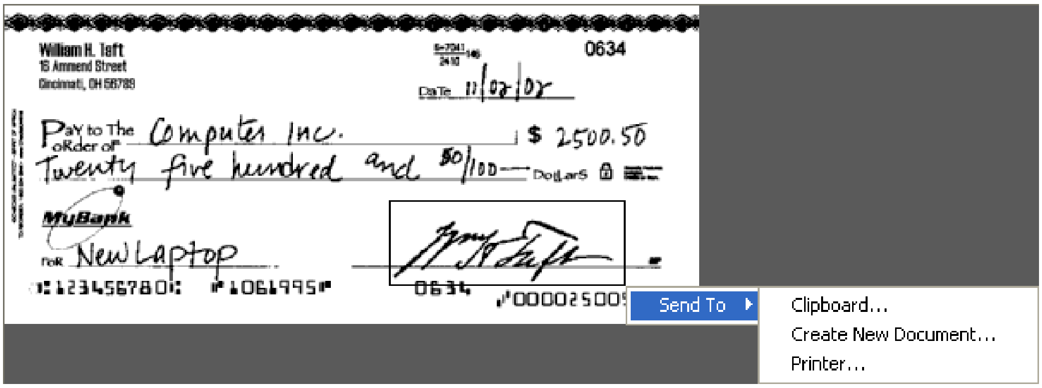
You can print or copy an area of a text or image document using the Rubber Band feature. Copied content can be pasted into another program or be used to create a new document in OnBase. To successfully print or copy selected areas of a text document with an overlay applied, the overlay must be removed.

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.

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Create New Document</td><td>Available for image documents only, this option creates a new OnBase document from the selected area. After you select this option, the Create new document from existing dialog box is displayed. Index the new document by specifying the Document Type Group, Document Type, Document Date, and any Keyword Values.
Click OK to create the new document.
Click Clear to remove the currently displayed values.
Click Cancel to exit without creating a new document.</td></tr>
<tr><td>Printer</td><td>Prints the selected area. If you select this option, the Print dialog is displayed. Select the desired settings and click OK. The Confirm dialog box displays the following message: Do you want the zoom region resized to fit the printed page width?
Select Yes to resize the selected area to the fit the width of the printed page.
Select No to print the selected area in its true size.
Select Cancel to exit without printing.</td></tr>
</table>

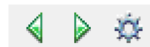
Toolbars in the Document Viewer

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.

Document Results Toolbar



Button	Description
	**Next Results** displays the following page of the Document Search Results list, if there is one (i.e., if the number of listings exceeds the per-page maximum specified in the **Results Per Page** field in **Document Select Options**).
	**Previous Results** displays the preceding page of the Document Search Results list, if there is one (i.e., if the number of listings exceeds the per-page maximum specified in **Document Select Options** and if you are currently viewing any page of listings except the first page).
	**Options** lets you modify Document Search Results list options.

Internal Text Search Toolbar

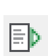
When using the OnBase Viewer, you can perform internal text searches for specific text strings within an open document using the **Text Search** toolbar.

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 43.
	**Find Previous** searches for the preceding occurrence of the specified string within the current text document.
	**Find Next** searches for the following occurrence of the specified string within the current text document.

Performing an Internal Text Search

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

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

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

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

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

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

Limiting Searches Using Text Search Options

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

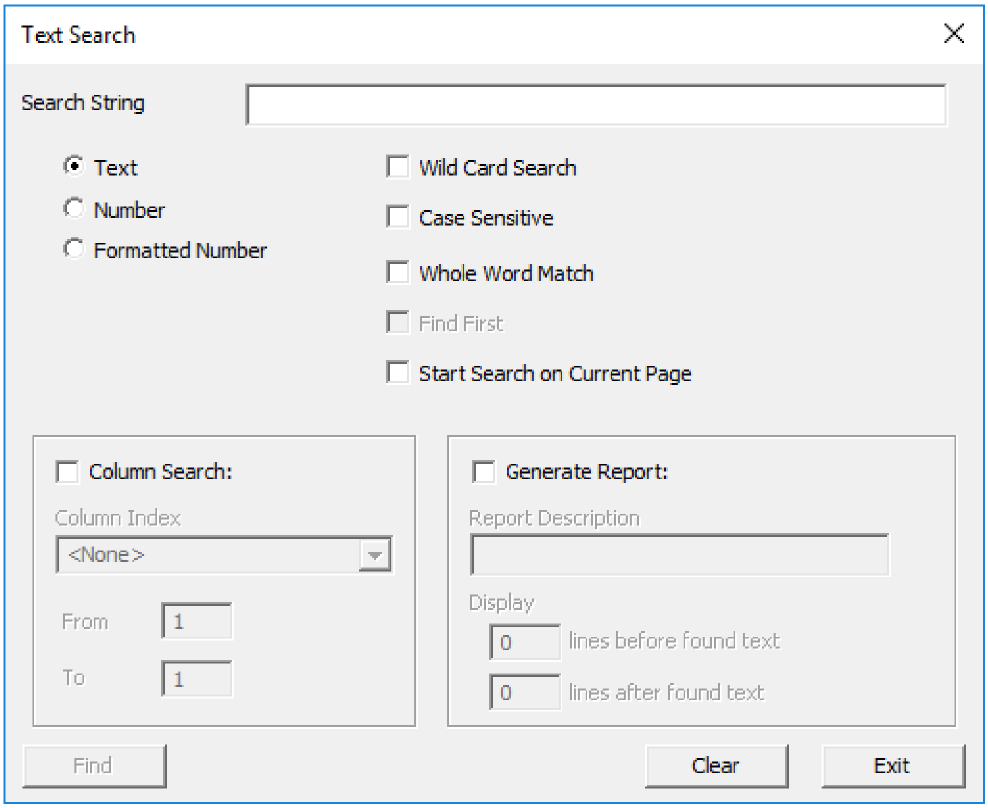
- If you know the string occurs somewhere between the current page and the end of the document, you can apply an option to start the search from the page you are currently viewing.
- If you know that the phrase you're looking for occurs only within a specific set of columns, you can limit the search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

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

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

To perform a search using text search options:

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



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

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

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

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

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

7. Select **Start Search on Current Page** to begin the search on the current page. Clear this option if you want the search to begin on the first page of the document.

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

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

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

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

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

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

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.

Showing or Hiding Toolbars

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

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

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

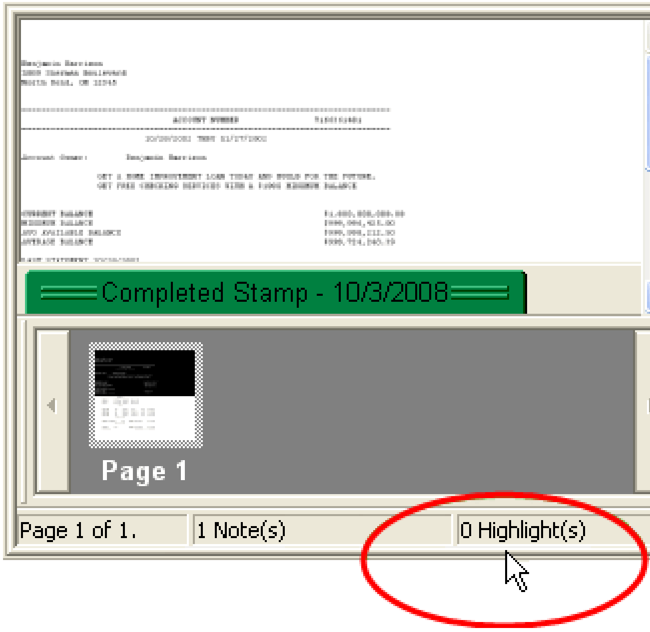
Auto-Hide Toolbars

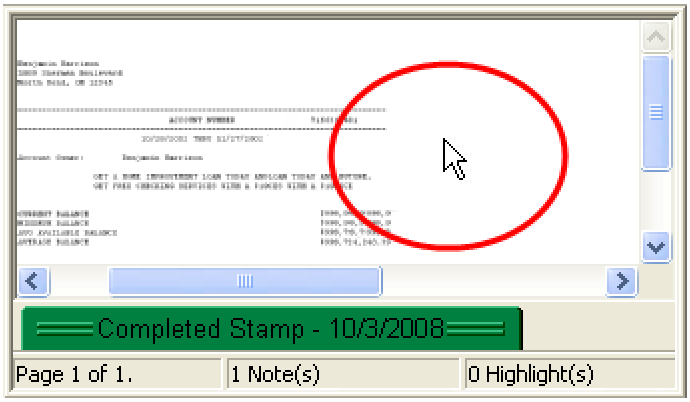
Auto-Hide provides the ability to hide toolbars until you position your pointer over their display area.

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

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

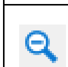
   In the example below, notice the **Pages** toolbar is displayed when the pointer is placed over the **Pages** toolbar display area. The **Pages** toolbar is hidden when the pointer is not over the **Pages** toolbar display area.

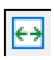
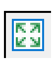
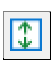
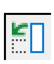
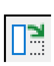




Viewer Control Toolbar

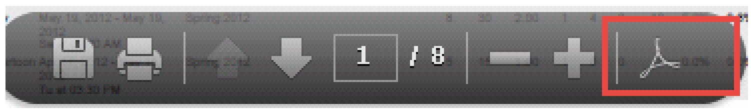
The Viewer Control toolbar allows you to view the document more efficiently. Use the buttons to navigate within the document, resize and reorient the page, and print.

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

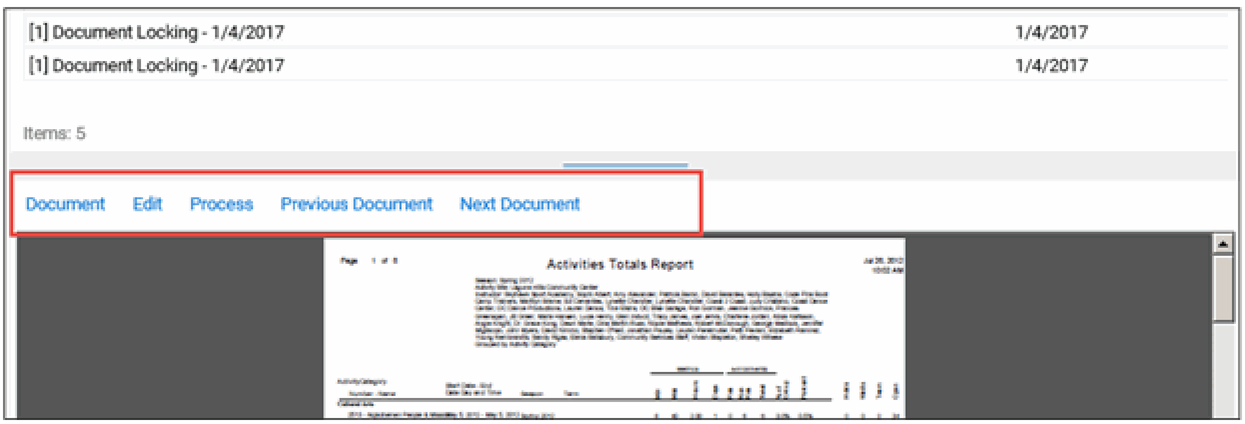
Button	Description
	**Sizing** options allow you to select a standard sizing option. Select a specific percentage of reduction or magnification (25%, 50%, 75%, 100%, or 200%), Fit Width, Fit Height, Fit Window, or True Size. Also displays the current magnification percentage whenever the **Scale | Zoom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

PDF Viewer Toolbar

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



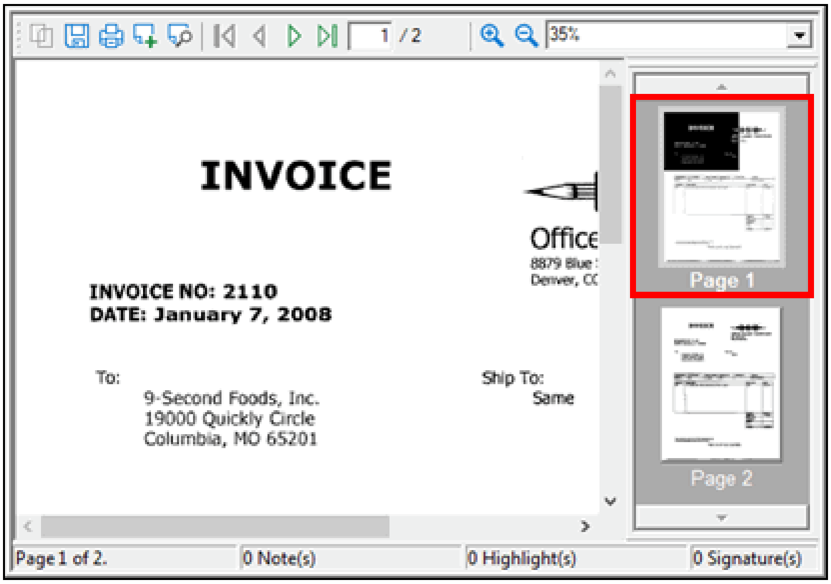
To navigate within the viewer, the following toolbar is displayed:



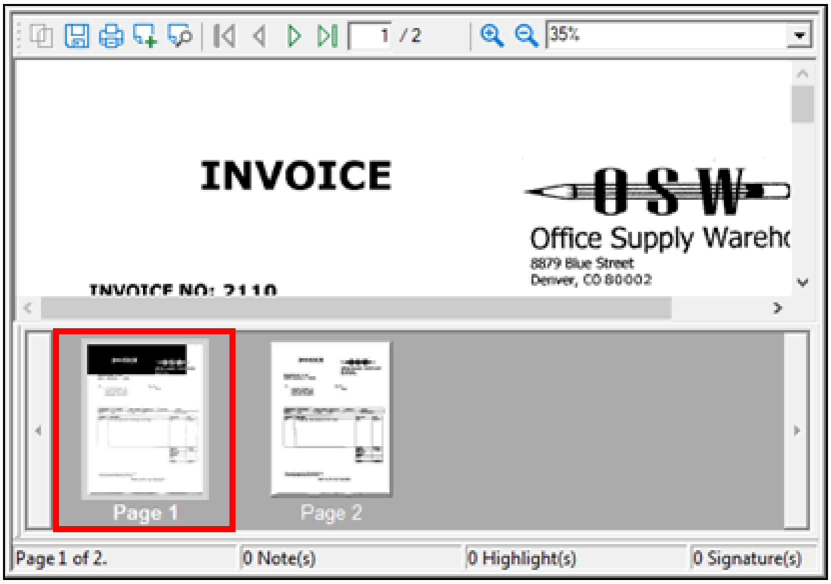
This toolbar provides you with many of the existing right-click menu options that are available for image and text documents, since the right-click menu is not accessible when viewing these documents.

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

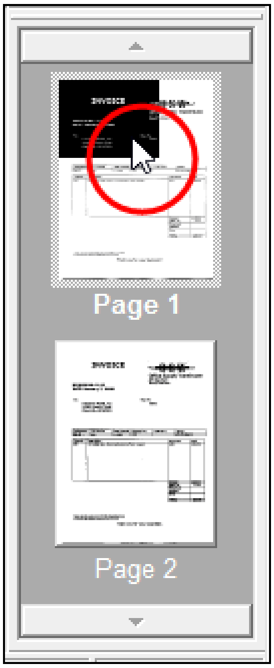
Thumbnails can be displayed or hidden by default. To show or hide thumbnails, right-click anywhere in the Document Viewer and select **Toolbars** | **Pages**. This toggles the thumbnails on or off.

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.

Scale

The Scale feature provides options for viewing documents.

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

Process

There are several process options available when viewing documents.

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

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

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

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

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

Note: You can only save rotations on image documents.

Display

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

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

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

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

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

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.

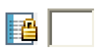
Note: If there is more than one value for the referenced Keyword Type, all documents matching cross-reference criteria are retrieved.

Using the Column/Row Locking Toolbar

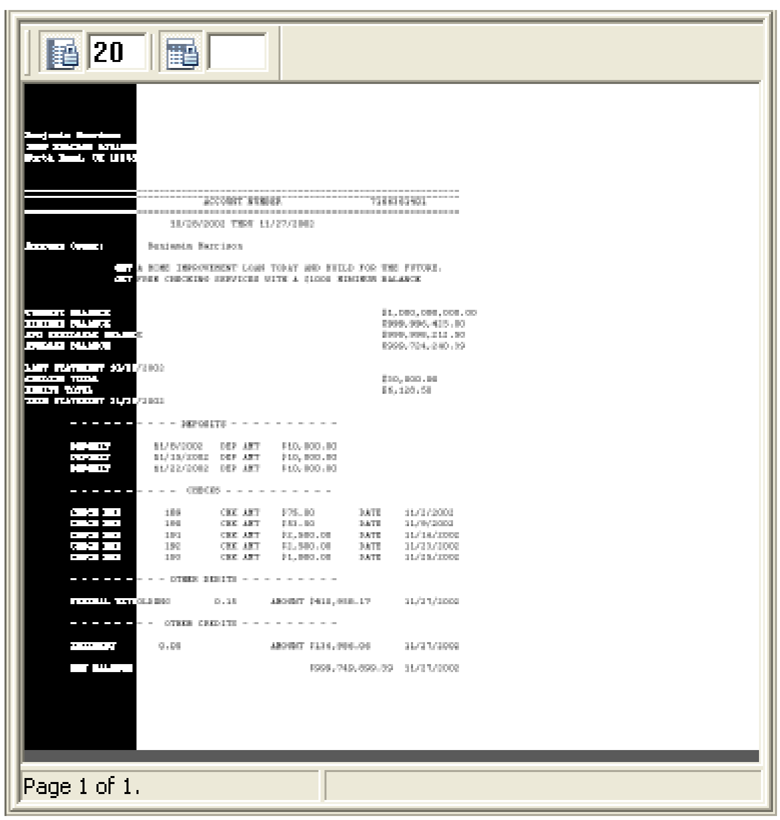
This toolbar is available for text report formatted documents. The Column/Row Locking toolbar allows you to lock the position of the specified number of columns and/or rows of text.

This allows you to “dock” an area of the page (such as header information that you want to remain viewable), while scrolling through the document.

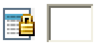
Locking Columns

1. In the column data entry field, enter the number of columns of text (from the left of the document) to lock.
2. Click  **Lock Columns**.

   The locked columns are displayed in the shaded region.

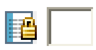
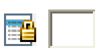


Locking Rows

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

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.

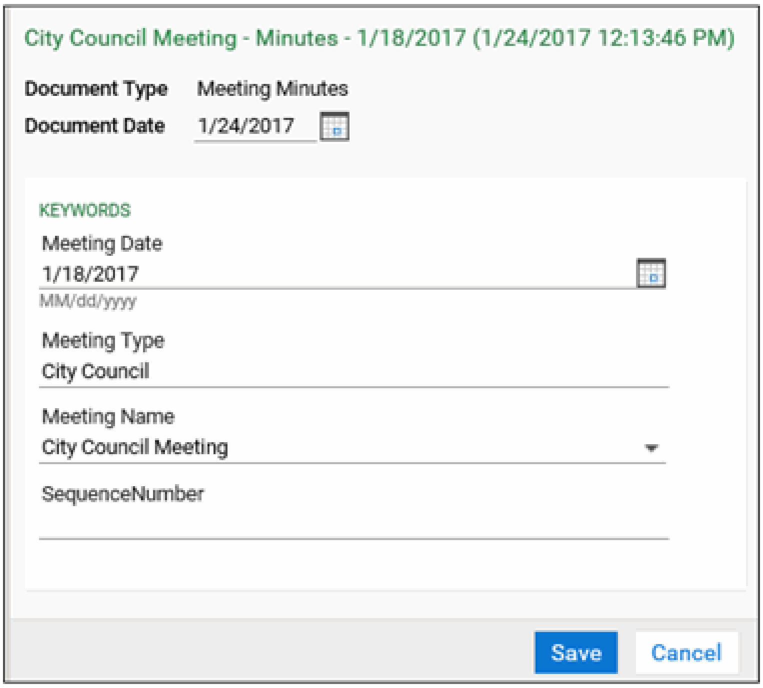
Access a Document's Keyword Values

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

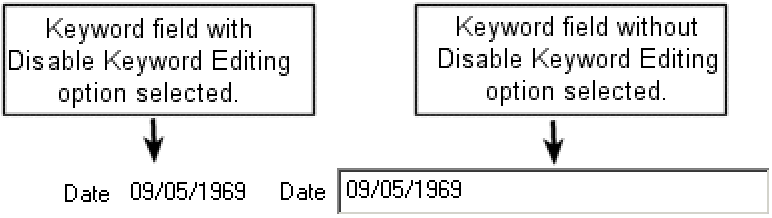
To access a document's Keyword Values, do one of the following:

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

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



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



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

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

Send To Options

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

Display Considerations

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

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

From an Open Document

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

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

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

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

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

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

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

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

From the Document Search Results List

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

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

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

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

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

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

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

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

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

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

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

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

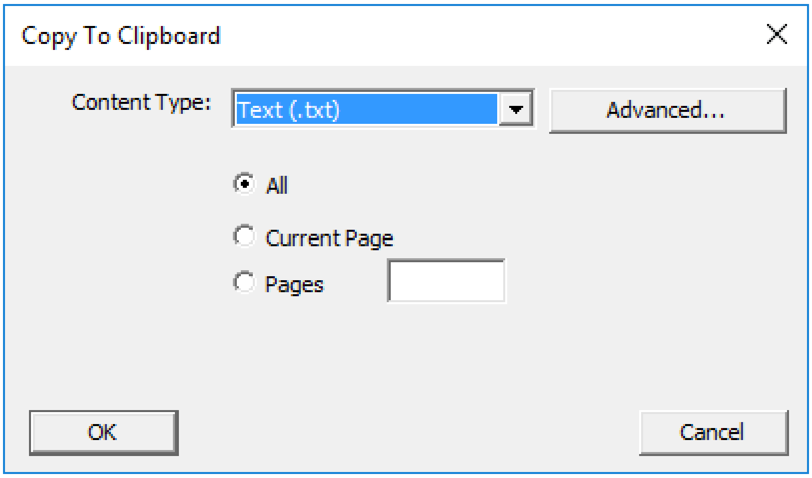
Send To | Clipboard - Copying Documents to the Clipboard

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

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

To copy a document to the clipboard:

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



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

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

3. Click **OK**.

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

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

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

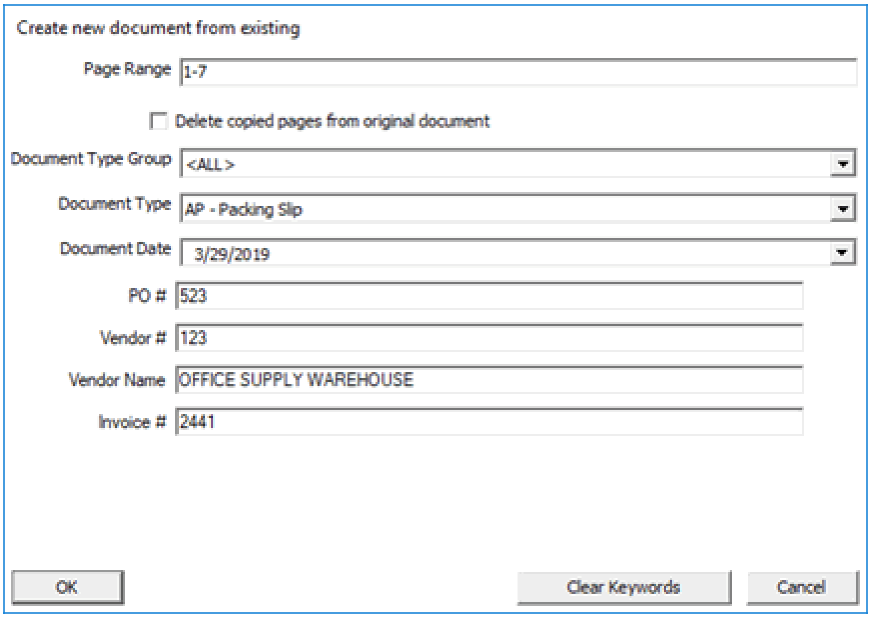
- If any Document Type in the **Search Results list** has **Copy to Clipboard/Save As** and **Create New** privileges, the **Create New Document** menu option is visible.
- If an individually selected document type in the **Search Results list** has **Copy to Clipboard/Save As** privileges, the **Create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

Create New Documents Using ActiveX

To create a new document using ActiveX controls:

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

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



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

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

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

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

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

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

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

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

---

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.

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:

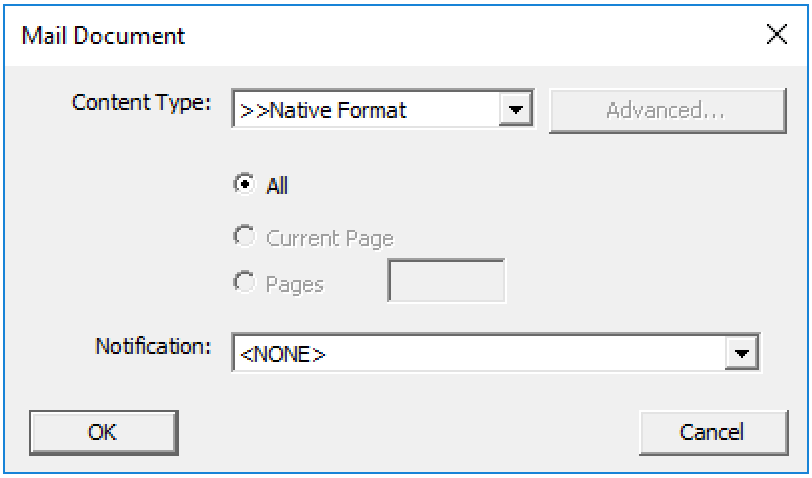
- If your default mail client is IBM Lotus Notes, emails composed in OnBase are auto-saved in the IBM Lotus Notes drafts folder. When emails are discarded in OnBase before being sent, they are not removed from the IBM Lotus Notes drafts folder.
- Email signatures cannot be automatically added for certain 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	Saves or sends the selected documents in the format in which they are stored in OnBase (for example, OLE documents such as Word documents and PDFs, uncompressed text documents, most image documents). Overlays are not applied. **Note:** For multi-page image documents, this option saves the document as a single-file TIFF file. **Note:** This content type is only available if the selected documents can be successfully saved or mailed in their original formats.
Rendered Format or AutoDetect Format	Saves or sends each of the selected documents in the format that most represents a viewable document outside of OnBase. For example, an E-Form or Virtual E-Form is saved as an HTML file.
PDF (.pdf)	Saves or sends the selected documents as PDF files. For multiple documents selected, each document is converted to a separate PDF. Available for documents with any of the following file formats: • Image file format • PCL • PCL with overlay • PDF • Text report format • Text report format with overlay • XML with style sheet
Encrypted PDF (.pdf)	Sends the selected documents as encrypted PDF files. Each selected document is encrypted as a separate PDF. Upon choosing this content type, you will be prompted to enter a password, which the recipient will need to enter upon opening the attachment. Available for documents with any of the following file formats: • Image file format • PCL • PCL with overlay • Text report format • Text report format with overlay

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

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

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

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

4. Select one of the following page options:

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

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

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

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

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

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

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

Attachment Display Considerations

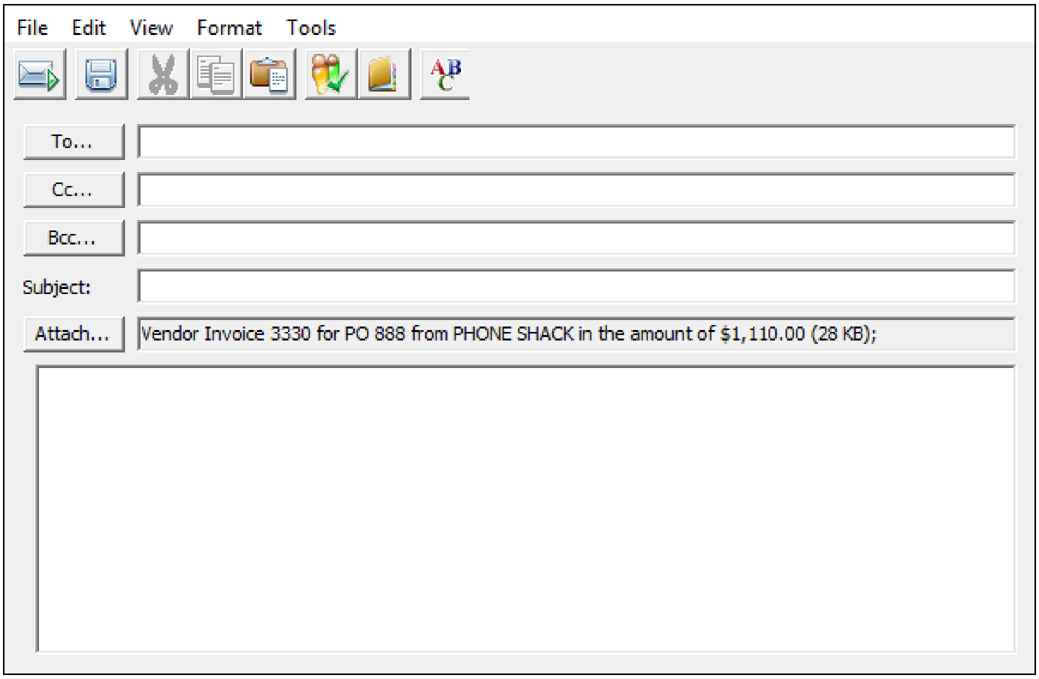
If the document you are sending has an overlay, the overlay is displayed on the attachment only if the overlay is displayed by default when you open the document in OnBase. Overlays are not displayed on attachments sent with a content type of **Native Format**, **Original Format**, or **Text (.txt)**.

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

Using the Mail Message Dialog Box

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

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



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

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

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

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

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

Checking Names and Addresses

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

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

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

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.

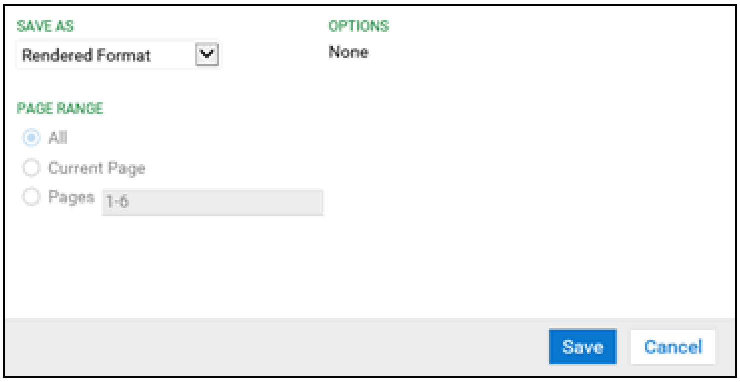
The following steps describe how to save one or more documents to a file:

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 87.
   - From an open text or image document, right-click and select **Send To | File**, or click the **Save to File** toolbar button.

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

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



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

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

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

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

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

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

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

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

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

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

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

7. Click **OK**. The **Save As** dialog box is displayed.
8. Modify the file's name and location as needed. See File Naming Conventions on page 87 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.

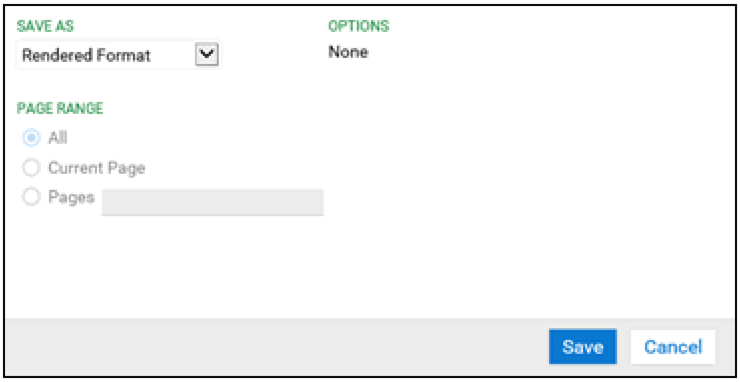
If the default **Save As** location already contains a file with a matching file name, OnBase automatically appends the new file's name with an underscore and an incremental number. For example, if **Checking Statement Acct#1020** already exists in the default **Save As** location, OnBase will name the new file **Checking Statement Acct#1020_1.tif**. See Character Substitutions on page 88 for more information.

Saving Multiple Documents to a Zip File

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

To save multiple documents to a .zip file:

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



3. Select a content type from the drop-down list to specify how the selected documents are saved within the .zip file. See Saving Documents to Files on page 83 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 **_**.

Sending Documents to Print Queues in the HTML Web Client

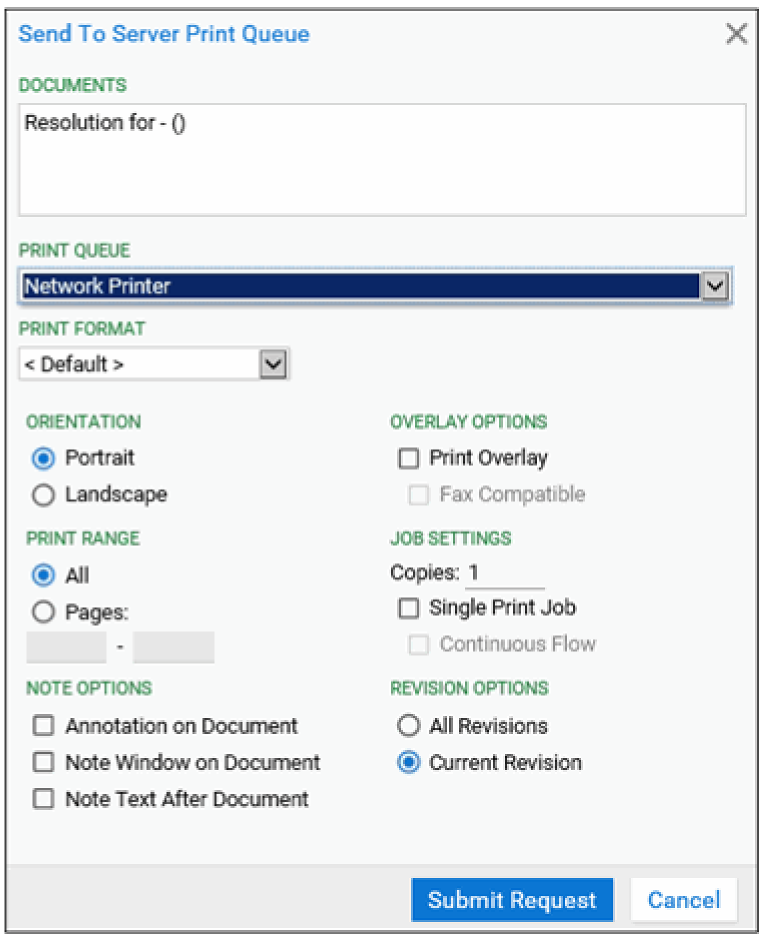
If you have sufficient privileges, you can send a document to a server print queue.

Note the following considerations:

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

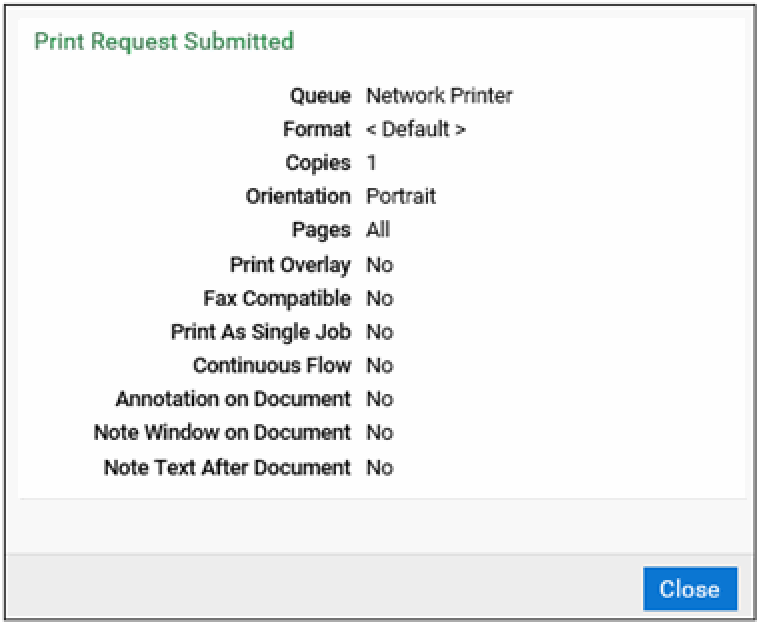
To send documents to a server print queue:

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



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

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



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

Print Queue Dialog Box Options

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

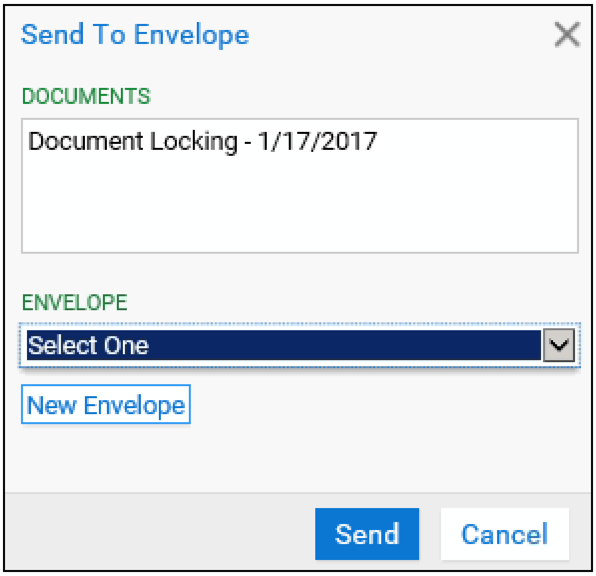
Option	Description
Print Queue	Select the desired network print queue (mapped to the desired printer) from the **Print Queue** drop-down list. Print queues manage the manner in which documents are printed by defining the method for generating the print request, as well as the type of printer that will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

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

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.

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 **_**.

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.

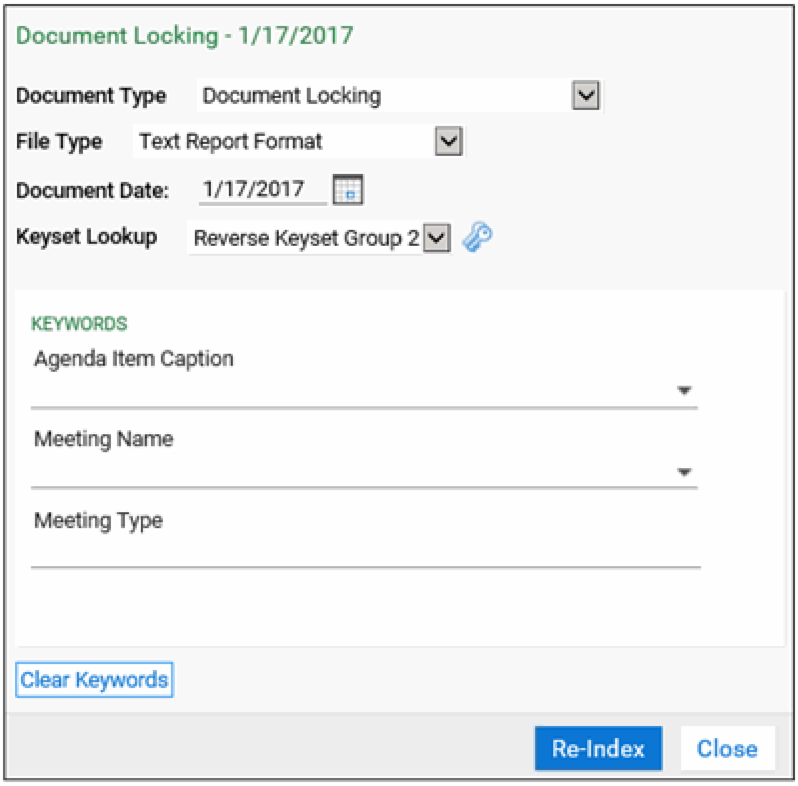
Re-Indexing Documents

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 98.

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



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

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

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

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

Caution: If you are re-indexing a document associated with a Keyword Type Group (KTG) or Multi-Instance Keyword Type Group (MIKTG) filled by an AutoFill Keyword Set to another Document Type associated with the same KTG or MIKTG filled by an AutoFill Keyword Set, the AutoFill Keyword Set may unexpectedly re-populate secondary Keyword Values once the Document Type is changed. For more information, see Considerations for Re-Indexing Documents and Adding or Modifying Keyword Values on page 98.

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 94, only you would access documents from the Document Results Search List using the Revisions/Rendition option from the right-click menu. When the **Revisions/Renditions** dialog box is displayed, select the oldest revision and re-index as needed. All the options available during a regular re-indexing are available when re-indexing a revision, including the ability to change the file type.

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

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

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

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

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

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

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

  If the original Document Type contains a Multi-Instance Keyword Type Group, the Document Type to which you want to re-index must contain the same Multi-Instance Keyword Type Group in order to preserve the integrity of the data relationship.
- Re-indexing from a standard Keyword Type that has multiple Keyword Type Values to a Multi-Instance Keyword Type Group is not supported. It is not supported because it is not known which instance of the Multi-Instance Keyword Type Group to associate with each Keyword Type Value. If you must re-index from standard Keyword Types to a Multi-Instance Keyword Type Group, you must manually enter all of the Keyword Type Values appropriately in the Multi-Instance Keyword Type Group instances.
- **AutoFilled Keyword Values in Keyword Type Groups or Multi-Instance Keyword Type Groups**

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

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

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

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

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

- **Require Changes to Child Values in a Cascading Data Set**
  A Cascading Data Set is an indexing feature that defines parent/child relationships between drop-down Keyword Values available on a document or folder. Changing a parent Keyword Value in a Cascading Data Set will not update the child Keyword Values that depend on it. For example, suppose a document is indexed with a selected State and County, where the County Keyword Value is a child to the selected State Keyword Value. If you change the State Keyword Value, then the County will retain its original value and will not be updated to reflect the new State.
- **Trigger Auto-Foldering**
  If you re-index a document that is configured for auto-foldering, it will trigger an auto-foldering process.
- **Alter the contents of Dynamic folders**
  Because Dynamic Folders contain documents according to their Keyword Value, re-indexing a document or adding or modifying Keyword Values may dynamically move the document from its current folder to another folder.
- **Affect the appearance of your document**
  The appearance of an XML file format document may change if you add or modify the Keyword Values or re-index the document. Your system administrator determines whether the document's appearance is dependent on Keyword Values.
- **Affect Workflow**
  Keyword Values can affect Load Balancing and certain Workflow actions, such as **Set Related Document's Keyword Equal to This Document's Keyword**. See the **Workflow** module reference guide or help files for details.

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

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

Notes and Annotations

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

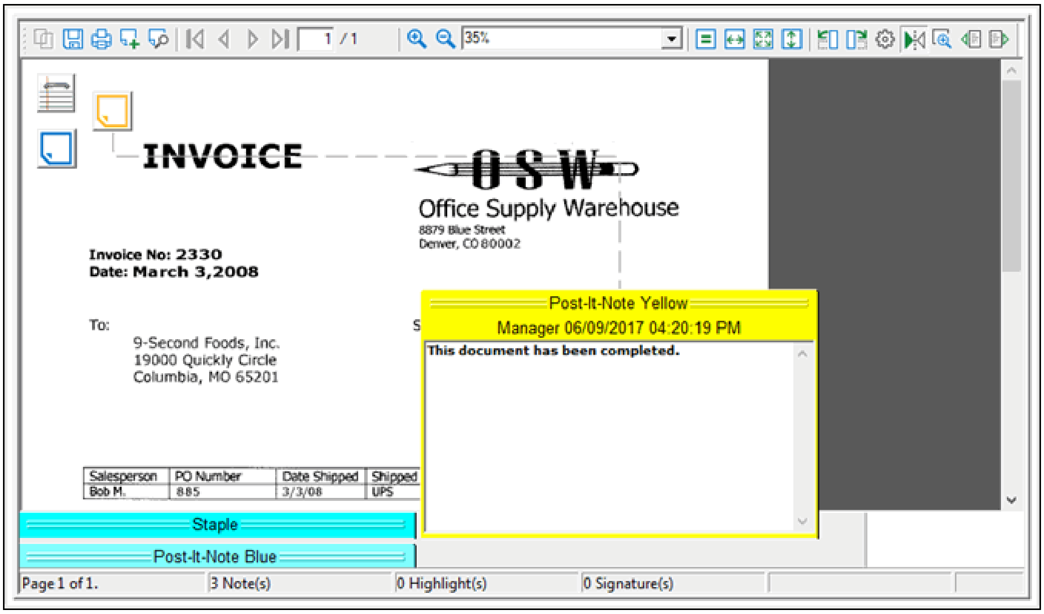
Note: You can view notes on an OLE document (such as a Microsoft Office document or PDF) in the **Notes** pane in the Document Viewer. See Notes Pane Viewer for OLE Documents on page 122. To add, edit, or delete notes on an OLE document, you must use the **Notes** dialog box. See Notes Dialog Box on page 112.

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

Notes Overview

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

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



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

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

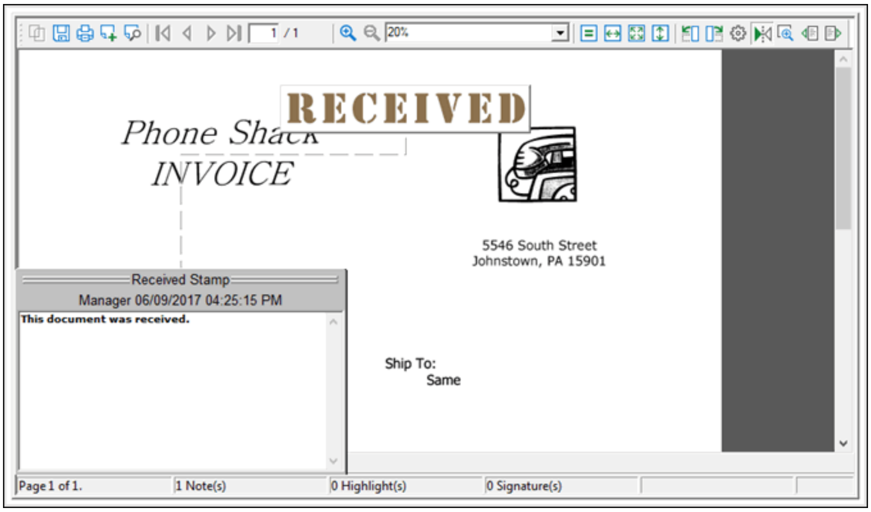
- Some notes may be configured to hide by default. To view any hidden notes, you can display a list of all notes on the document and open any notes from the list.
- Depending on your system setup and user privileges, you may be able to view, modify, delete or add notes to a Document Type, as well as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

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

Note Icons

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

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



Options

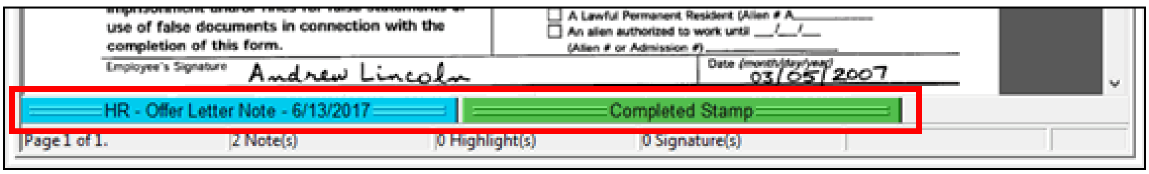
The **Options** button on the Viewer Control toolbar allows you to choose whether note icons and annotations are displayed while you're viewing a document.

Notes Toolbar

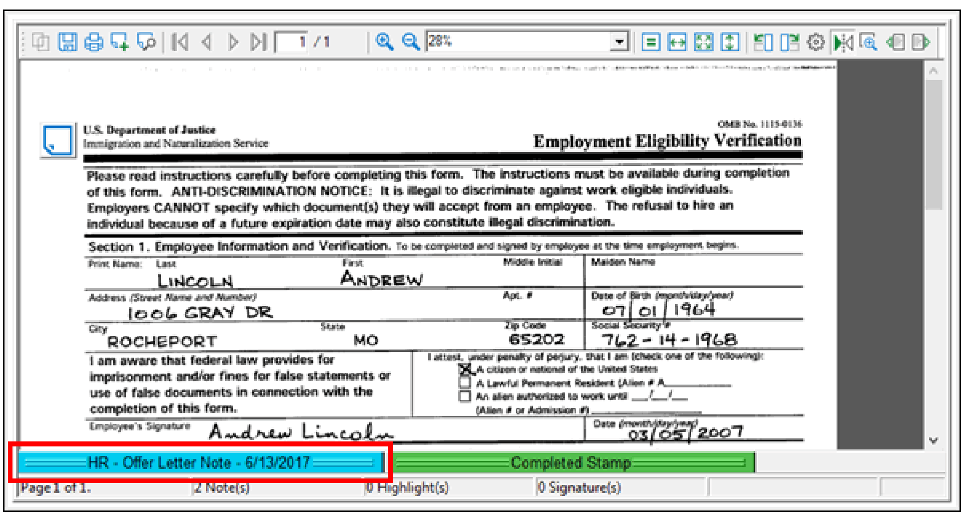
The **Notes** toolbar is a row of tabs representing notes and annotations on the current page. The toolbar is displayed along the bottom of the Document Viewer. You cannot undock and move this toolbar to another location.

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

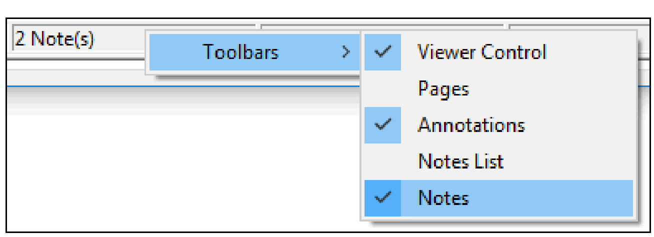
Note: If you are viewing a document that is locked by Records Management, you cannot create or modify notes.



Click a note tab to read the note or annotation.



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

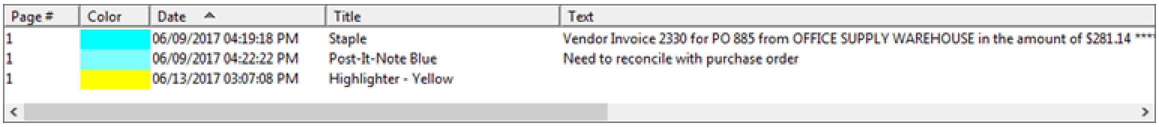


Note: HTML documents do not have toolbars. When you open an HTML document with one or more notes, OnBase displays the associated icon(s). Double-clicking an icon opens the note and displays its text. This action works only from HTML documents or from documents viewed in the HTML Web Client. Double-clicking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

Notes List Toolbar

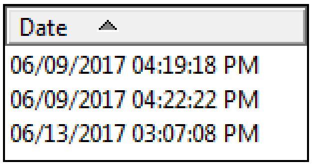
The **Notes List** toolbar displays all notes and annotations attached to a document in a list format. It tells the user the page on which the note is found, the note color, the date the note was created, the note type, and any text included within the note.

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



The following options are available in the Notes List:

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



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

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

View Notes - Open and View Notes or Annotations

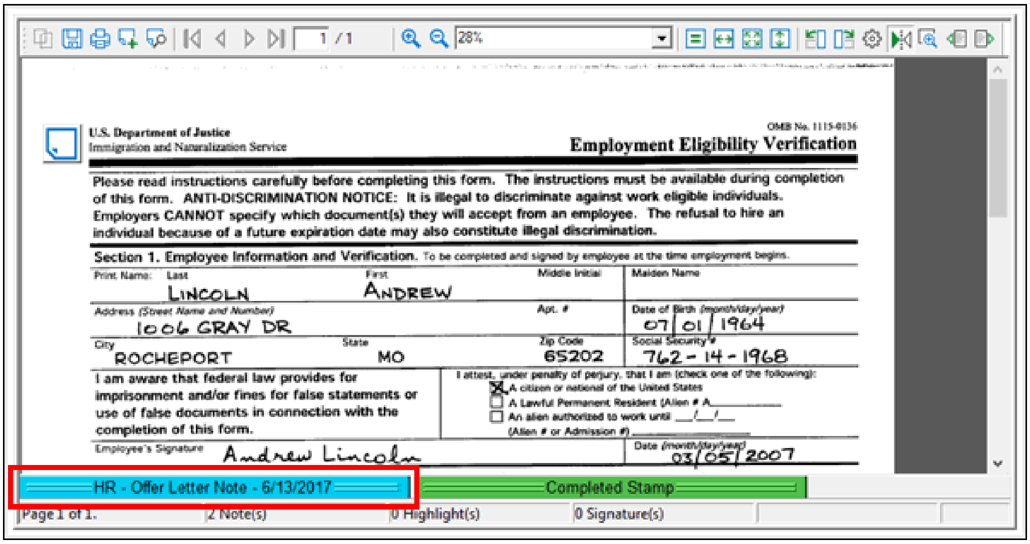
Users with the appropriate viewing rights will see most notes and annotations displayed on the document or displayed as tabs in the Notes toolbar at the bottom of the document.

When you view OLE documents (such as Microsoft Office documents or PDFs) in the Web Client, the number of notes on the document is displayed in the **Note(s)** section of the status bar and in the **Notes** pane of the Document Viewer.

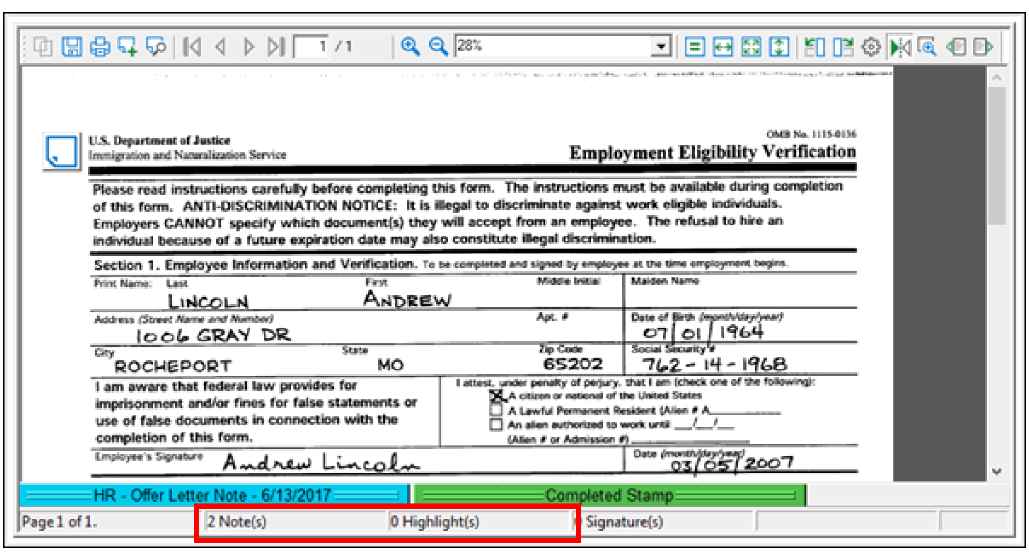
Viewing Notes

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

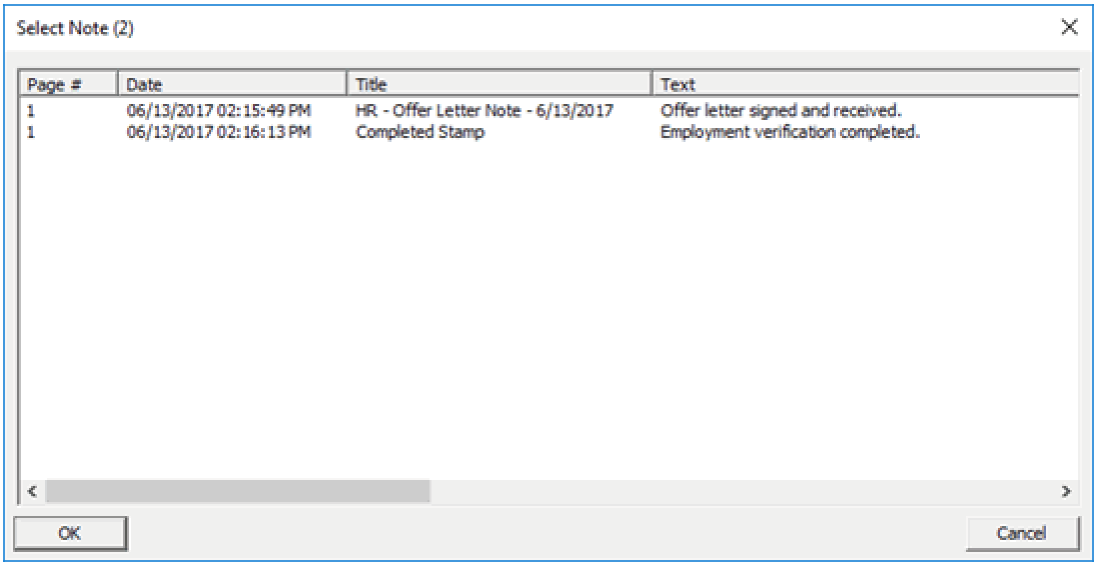
- Double-click the note's icon from the Document Viewer.
- Click the **View Notes** toolbar icon (ActiveX viewer only).
- Click the note's tab displayed in the **Notes** toolbar (ActiveX viewer only).



- Right-click an open document and select **Notes | View Notes**.
- Double-click the note in the **Notes List** toolbar.
- Double-click the **Note(s)** section or the **Highlight(s)** section of the status bar.



If a note or annotation exists on a document, it is listed in the **Select Note** dialog box.



The list includes the page where the note is found, the note type, the text of the note, and the date the note was created. Click on the column headings to sort the notes by that column.

Open a note by either selecting the note in the **Select Notes** dialog box and clicking **OK**, or by double-clicking the note in the **Select Note** list.

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

Moving Notes

If you have sufficient privileges to modify a note, you can move the note on a document.

To move a note, click and drag the note icon on the document. The new position is saved when you close or print the document.

Note: If you move a note off of the document, OnBase automatically resets the note position to the top left corner when the document is closed. When the document is opened again, the note is displayed in the top left corner.

Adding Notes, and Editing and Deleting Notes and Annotations

Notes and annotations can be added to, edited, or deleted from documents. Before you start working with Notes and annotations, ensure you have appropriate privileges for adding, editing, or deleting them.

Note: If you have privileges to create a note but do not have privileges to modify it, you can modify the note's text and position only during the same viewing session that you created the note. After you close the document, the note's text becomes read-only. You can reposition the note while viewing the document, but the note will return to its original position when you close the document.

Take note of the following when working with notes and annotations:

- Notes and annotations may contain messages that can be displayed and edited. If you have appropriate privileges, you can delete both notes and annotations from the **Notes** right-click menu.
- Note behavior differs slightly on HTML documents and in the HTML Document Viewer. For information about working with notes in these cases, see Add a Note in the HTML Document Viewer on page 108.
- Annotations are created using the Annotations toolbar. To add an annotation to a document, see the procedure for creating annotations.

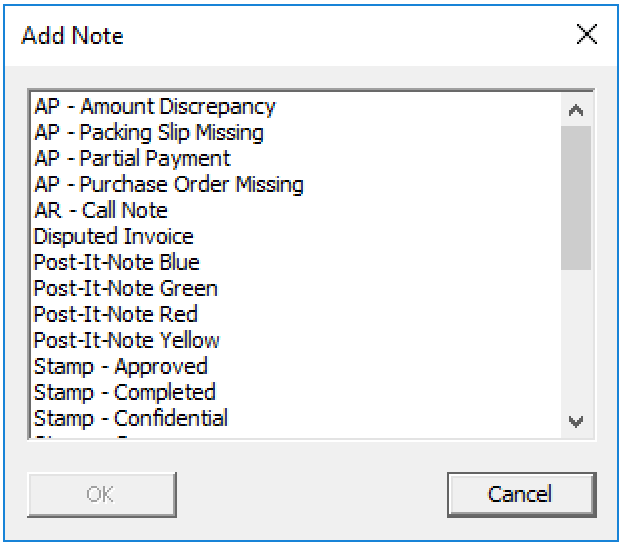
Add a Note to a Document

Users with privileges to create notes can add new notes to documents from the **Add Note** dialog box. Users can only add notes of the type(s) that his or her User Group(s) has rights to create.

Note: If you are viewing a document that is locked by Records Management, you can create new notes, but you cannot modify any existing notes.

1. Access the **Add Note** dialog box using either of the following methods:
   - Click the **Add Note** button from the Viewer Control toolbar.
   - Right-click the document and select **Notes** | **Add Note**.

   The **Add Note** dialog box displays the Note Types that you have rights to create.



2. Select a Note Type and double-click, or click **OK** to add the note.
3. Enter descriptive text and move the note icon to the desired location on the document. The note text and icon, in the position you placed it, is saved automatically.

Add a Note in the HTML Document Viewer

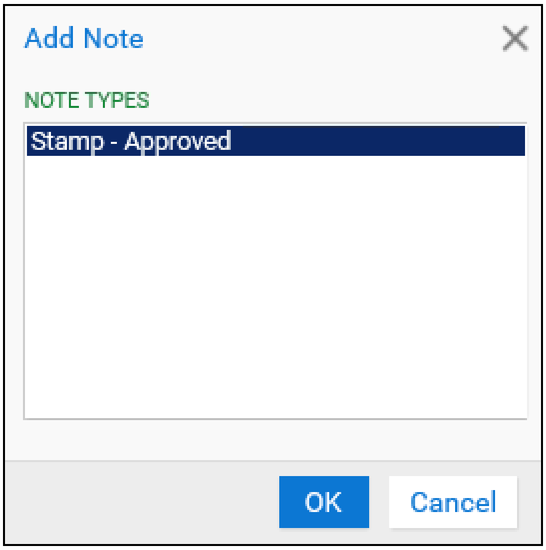
The following steps describe how to add notes to HTML documents and E-Forms and how to add notes in the HTML Document Viewer.

Note: You cannot add annotations to HTML documents.

To create a note:

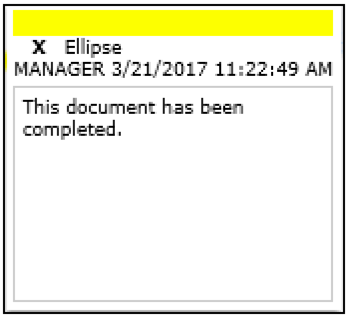
1. Right-click on the document and select **Note | Add Note**, or press **Ctrl + N**. The **Add Note** dialog box lists the available Note Types.

Note: The **Ctrl + N** shortcut is not supported in Chrome.



2. Select a Note Type and double-click, or click **OK** to add the note.

   The note is placed in the upper left-hand corner of the document. You can move the note by clicking and dragging the note or note icon on the document. The new position of the note is saved when an action is performed in either the document viewer toolbar or the right-click menu.



3. Edit or type a message in the note's text box. Notes are limited to 250 characters.
    - To minimize a note on an HTML document, double-click the note's title bar. The note's icon is displayed while the note is minimized. To view the note's text, double-click the note's icon.
    - To delete a note from an HTML document, click the **X** in the note's title bar. Click **Yes** to verify that you want to delete the note.
    - To change the note type, right-click the note and select **Change Note Type**. Select a new note type for the note.

Edit Note or Annotation Text

To edit a note, open the note and edit the note contents. Right-click for text-editing options:

Note: If you are unable to access the text box, you may not have user rights to edit the note.

- **Undo** - select to undo the last typed action
- **Cut** - removes selected text and place it on the clipboard
- **Copy** - retains selected text, but place it on the clipboard
- **Paste** - inserts clipboard text in to the active area (last place the mouse was clicked)
- **Delete** - deletes selected text
- **Select All** - selects all text (including default note text)

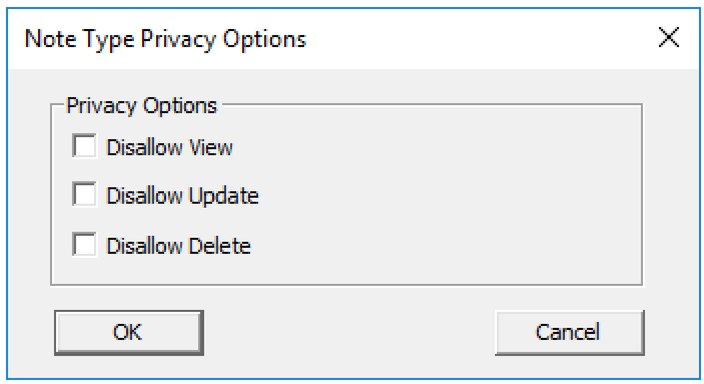
Note: Changes to notes and annotations are saved automatically. Notes that are moved off of the document revert to their last saved position.

Editing Note Type Privacy Options

Privacy options determine whether other users can view, edit, or delete an individual note you created.

1. To edit privacy options on a specific note, do one of the following:
   - Right-click on the note title bar and select **Privacy Options**.
   - Right-click the note in the **Notes List** toolbar and select **Privacy Options**.

   The **Note Type Privacy Options** dialog box is displayed.



   Some options may be unavailable depending on how the Note Type was set up by a system administrator.
2. Select one of the following options to restrict other users from performing the corresponding action.

Privacy Option	Description
Disallow View	Selecting this check box disallows users from viewing the note.
Disallow Update	Selecting this check box disallows users from updating information on the note.
Disallow Delete	Selecting this check box disallows users from deleting the note.

3. Click **OK** when you have selected the desired privacy options.

Deleting a Note

To delete an existing note in the ActiveX Viewer, do one of the following:

- Right-click on the note title bar and select **Delete Note**.
- Right-click the note in the **Notes List** toolbar and select **Delete Note**.

To delete an existing note in the HTML Document Viewer, do one of the following:

- Open the note and click the X in the note title bar.
- Click the **Notes** section on the bottom of the screen. Select the note you want to delete, and then click **Delete Note**.

Click **Yes** when prompted to confirm.

Note: You cannot delete an existing note on a locked document. See your system administrator for information regarding Document Lock Administration.

Changing the Note Type

To change the Note Type of an existing note, navigate to the page of the document the note appears on, and do one of the following:

- Right-click on the note title bar and select **Change Note Type**.
- Right-click the note in the **Notes List** toolbar and select **Change Note Type**.

Note: The **Change Note Type** option in the **Notes List** toolbar is only available when the page the note belongs to is displayed in the Document Viewer. For example, the option is not available if page 1 is displayed, and the note you right-click is on page 2.

Select the new type of note from the **Change Note Type** dialog box and click **OK**.

Note: Depending on system configuration for Note Types, some Note Types may be unavailable from the **Change Note Type** dialog box when using the ActiveX Web Client. See your system administrator for more information.

Notes Dialog Box

If you have appropriate privileges, you can add, view, edit, or delete notes using the **Notes** dialog box. The **Notes** dialog box is available in the following ways:

- Right-click a document in the Document Search Results list, which allows you to work with notes without opening documents.
- Right-click an open image document in the Document Viewer and select **Notes | View Notes** (HTML Web Client only).
- Click the **Note(s)** section of the status bar of the Document Viewer (HTML Web Client only).

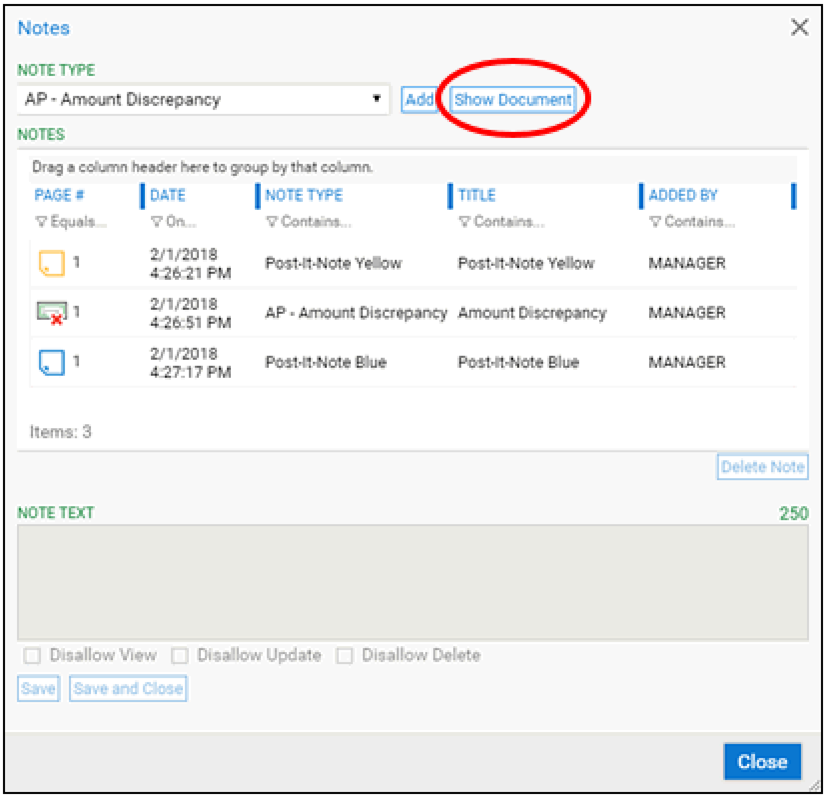
- For OLE documents (such as Microsoft Office documents or PDFs):
  - Select **Edit | Notes** from the OLE viewer menu.
  - Click **Edit** on an open note in the **Notes** pane.
  - Click the **Add Note** button in the **Notes** pane.

The **Notes** dialog box is the only way to add, edit, and delete notes on OLE documents in the Web Client. You can view the number of notes on an OLE document in the **Note(s)** section of the status bar or in the heading of the **Notes** pane in the Document Viewer. See Notes Pane Viewer for OLE Documents on page 122 for more information on viewing notes on OLE documents.

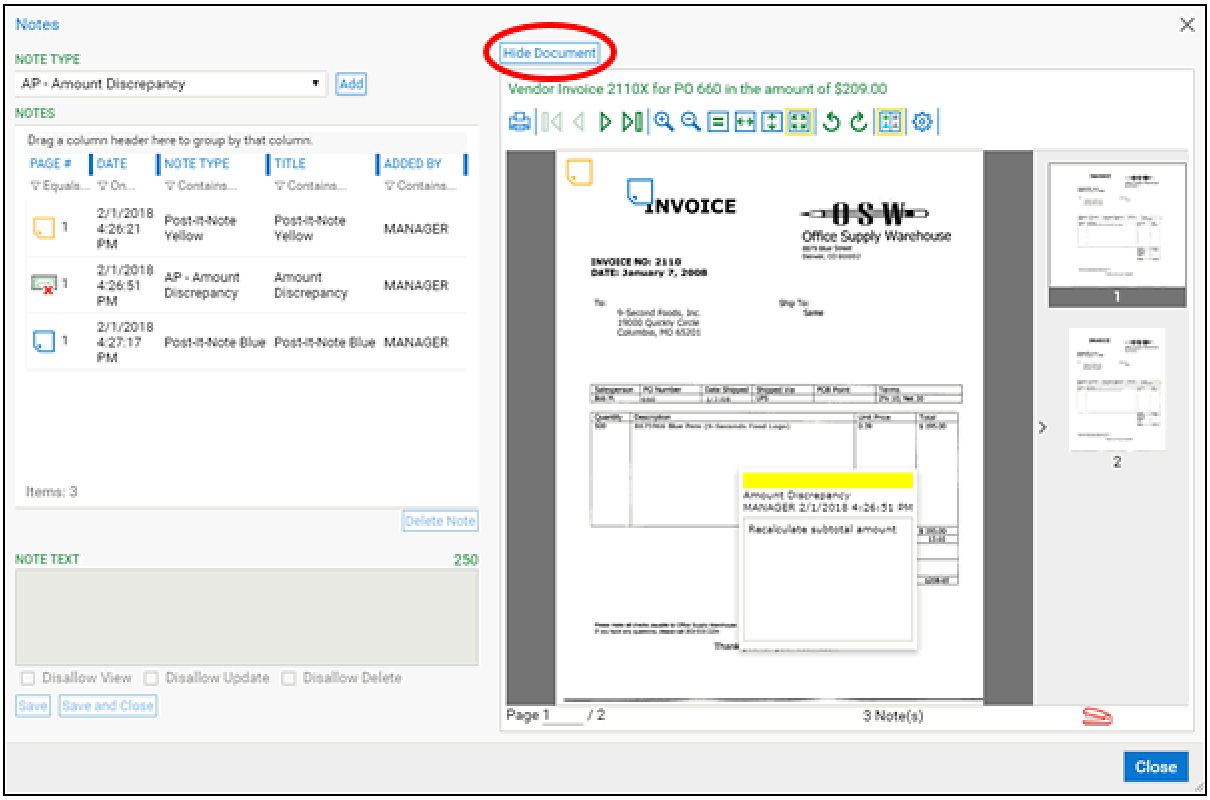
Note: If you have privileges to create a note but do not have privileges to modify it, you can modify the note's text only during the same viewing session that you created the note. After you close the document, the note's text becomes read-only.

Viewing a Document in the Notes Dialog Box

While working in the **Notes** dialog box, you can click the **Show Document** button to view the document alongside the notes in the dialog box.



Click **Hide Document** to hide the document and show only the notes in the dialog box.



Note the following limitations with viewing a document alongside notes in the **Notes** dialog box:

- Notes can only be added to the first page of a multi-page document in the **Notes** dialog box.
- Annotations cannot be drawn on a document being viewed in the **Notes** dialog box.

To accomplish any of these actions, perform them in the Document Viewer, not in the **Notes** dialog box.

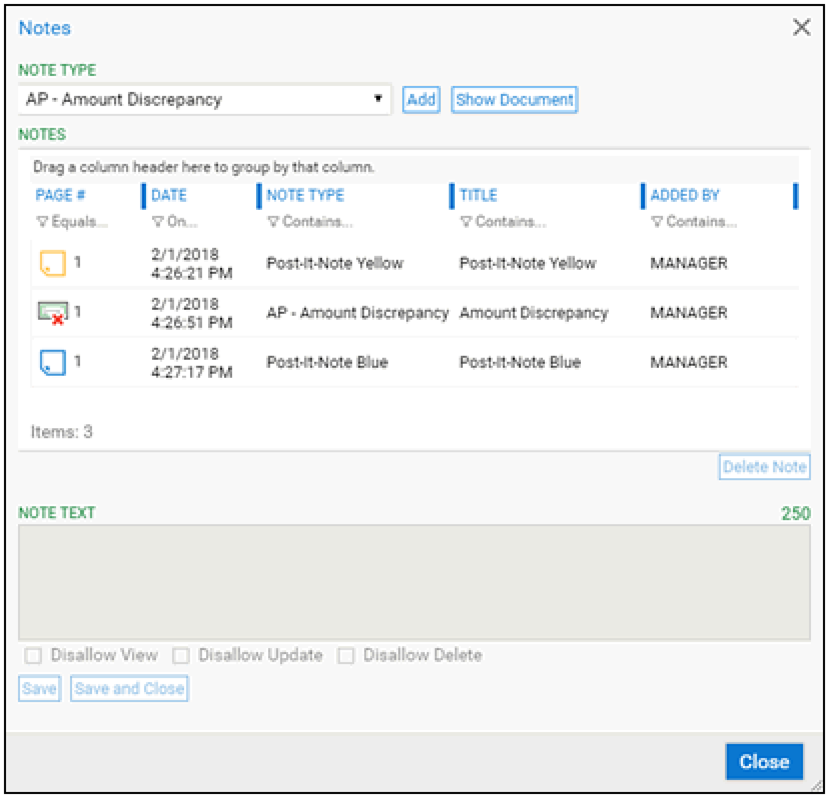
Viewing a Note in the Notes Dialog Box

To view a note in the **Notes** dialog box:

1. Open the **Notes** dialog box using one of the following methods:
   - Right-click a document in the Document Search Results list and select **Notes**.
   - Right-click an open document in the Document Viewer and select **Notes | View Notes** (HTML Web Client only).
   - Click the **Note(s)** section of the status bar (HTML Web Client only).

- From an open OLE document (such as a Microsoft Office document or PDF):
  - Select **Edit | Notes** from the OLE viewer menu.
  - Click **Edit** on an open note in the **Notes** pane.

The **Notes** dialog box displays any notes on the document.



2. Select a note to view any note text in the **Note Text** box.

Adding a Note in the Notes Dialog Box

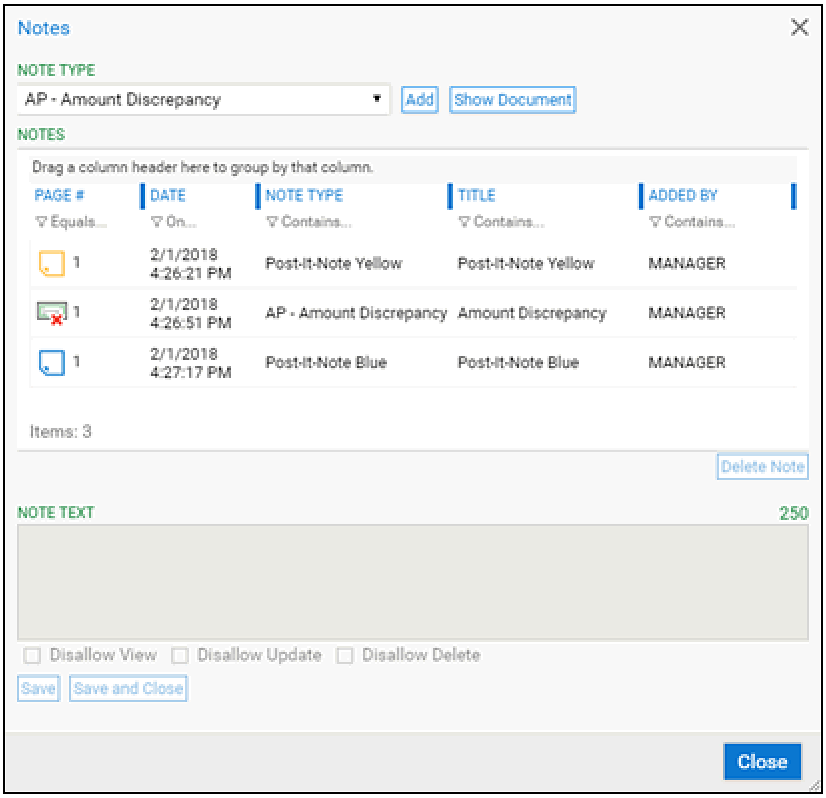
The **Notes** dialog box allows you to add, view, edit, or delete notes on an open document.

To add a note using the **Notes** dialog box:

1. Open the **Notes** dialog box using one of the following methods:
   - Right-click a document in the Document Search Results list and select **Notes**.
   - Right-click an open document in the document viewer and select **Notes | View Notes** (HTML Web Client only).
   - Click the **Note(s)** section of the status bar (HTML Web Client only).

- From an open OLE document (such as a Microsoft Office document or PDF), do one of the following:
  - Select **Edit | Notes** from the OLE viewer menu.
  - Click the **Add Note** button in the **Notes** pane.

The **Notes** dialog box is displayed.



2. Select a note type from the **Note Type** drop-down list, and click **Add**. The new note is added to the **Notes** list. If the note type is configured to include default text, it is displayed in the **Note Text** field.
3. Enter or modify the text of the note in the **Note Text** field. The character counter displays the remaining characters allowed in the note.

4. Select the privacy options to enable or disable for the selected note. The following privacy options are located below the **Note Text** field:

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

Note: Depending on the configuration of the note type, you may be unable to modify some privacy options. For more information on note privacy options, see Setting Note Privacy Options on page 120.

5. Click **Save** to save the note to the document and keep the **Notes** dialog box open, or click **Save and Close** to save the note and close the **Notes** dialog box.

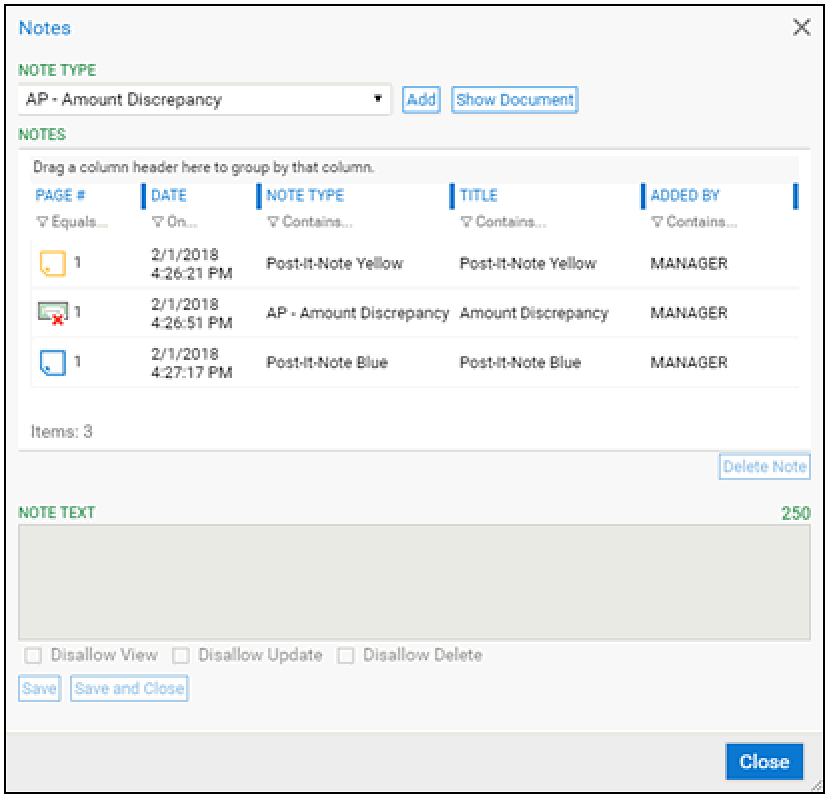
Editing a Note in the Notes Dialog Box

To edit a note in the **Notes** dialog box:

1. Open the **Notes** dialog box using one of the following methods:
   - Right-click a document in the Document Search Results list and select **Notes**.
   - Right-click an open document in the Document Viewer and select **Notes | View Notes** (HTML Web Client only).
   - Click the **Note(s)** section of the status bar (HTML Web Client only).

- From an open OLE document (such as a Microsoft Office document or PDF):
    - Select **Edit | Notes** from the OLE viewer menu.
    - Click **Edit** on an open note in the **Notes** pane.

The **Notes** dialog box is displayed.



2. Select the note to be edited from the **Notes** list.
3. Edit the text in the **Note Text** box. Right-click for additional text editing options. The character counter displays the remaining characters allowed in the note.
4. Click **Save** to save the note to the document and keep the **Notes** dialog box open, or **Save and Close** to save the note and close the **Notes** dialog box.

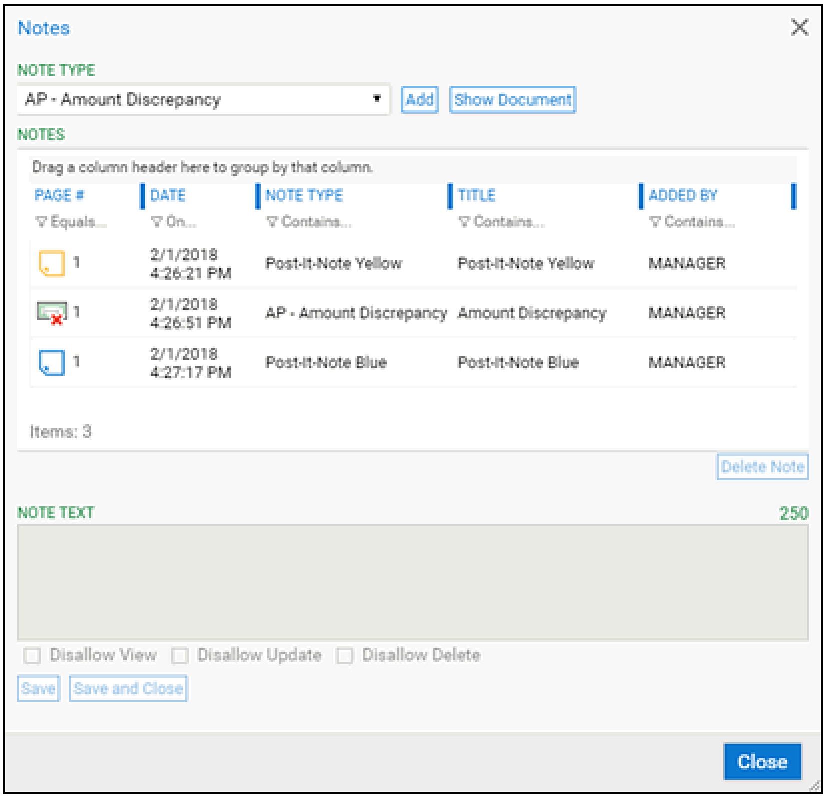
Deleting a Note in the Notes Dialog Box

To delete a note from the **Notes** dialog box:

1. Open the **Notes** dialog box using one of the following methods:
    - Right-click a document in the Document Search Results list and select **Notes**.
    - Right-click an open document in the Document Viewer and select **Notes | View Notes** (HTML Web Client only).
    - Click the **Note(s)** section of the status bar (HTML Web Client only).

- From an open OLE document (such as a Microsoft Office document or PDF):
  - Select **Edit | Notes** from the OLE viewer menu.
  - Click **Edit** on an open note in the **Notes** pane.

The **Notes** dialog box is displayed.



2. Select the note to be deleted from the **Notes** list.
3. Click **Delete Note**. You are prompted to confirm the deletion.
4. Click **Yes** to delete the note.

Note: If you delete a Staple note from the Notes list on one document, the corresponding staple that was attached to the deleted staple is still displayed on the other corresponding document. If you do not want the staple on the corresponding document, you must delete it also.

Setting Note Privacy Options

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

Consider the following when setting note privacy options in the Web Client:

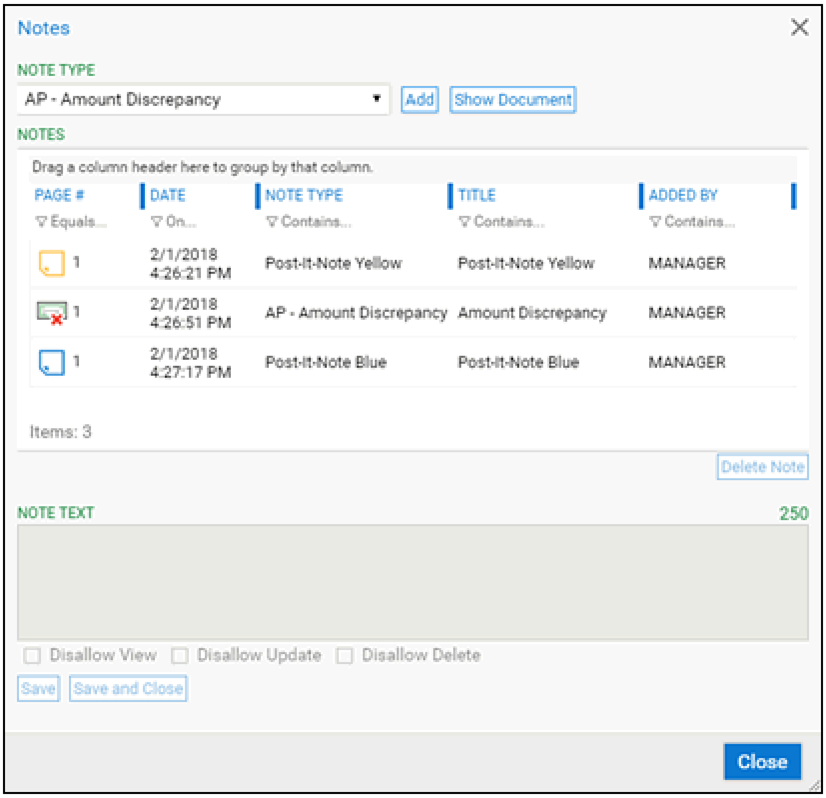
- Users with administrative rights are always able to view, update, and delete all notes and to view and set note privacy options for all notes.
- Only the creator of a note (and any users with administrative rights) can view and set the privacy options of that note.
- If a document is locked, the privacy options for all notes on that document cannot be modified by any other users. This includes any users with administrative rights.
- The privacy options for a note type may be set by default by your system administrator.

In the Web Client, note privacy options are set in the **Notes** dialog box. To set note privacy options:

1. Open the **Notes** dialog box using one of the following methods:
    - Right-click a document in the Document Search Results list and select **Notes**.
    - Right-click an open document in the Document Viewer and select **Notes | View Notes** (HTML Web Client only).
    - Click the **Note(s)** section of the status bar (HTML Web Client only).

- From an open OLE document (such as a Microsoft Office document or PDF):
  - Select **Edit | Notes** from the OLE viewer menu.
  - Click **Edit** on an open note in the **Notes** pane.

The **Notes** dialog box is displayed.



2. Select the note that you want to modify from the **Notes** list.
3. Select the privacy options to enable or disable for the selected note. The privacy options are located below the **Note Text** field. The following privacy options are available:

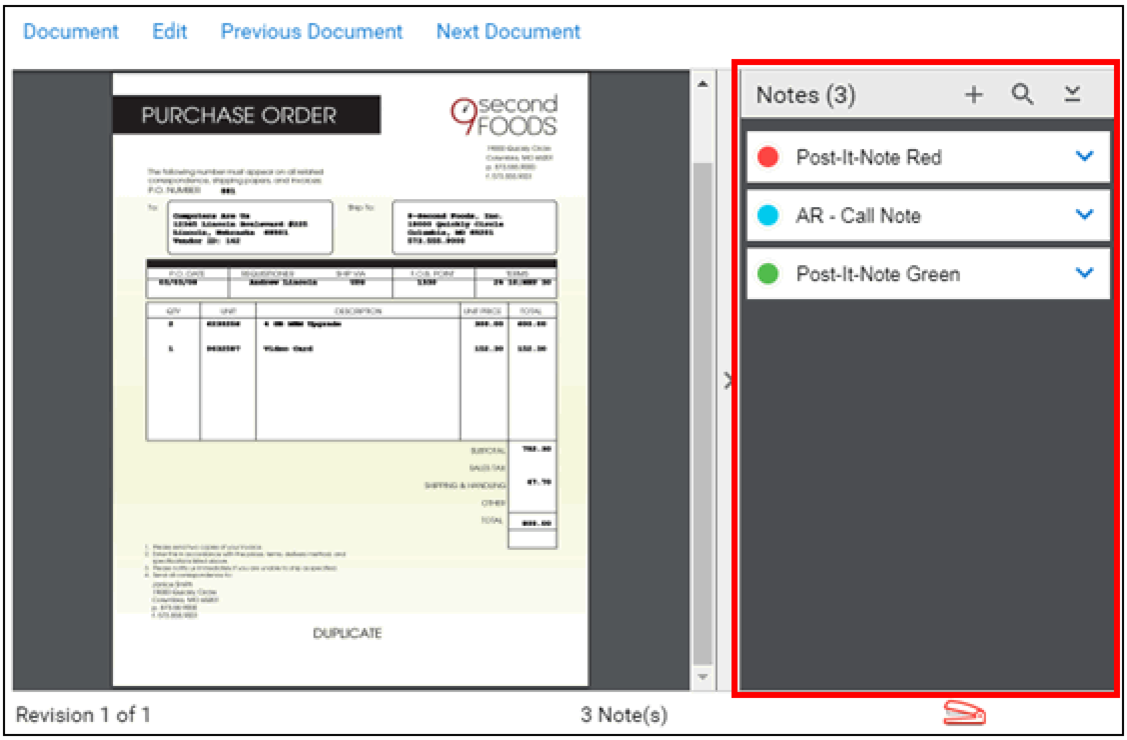
Note Privacy Option	Description
Disallow View	Prohibits all other users from viewing the note. **Note:** If this option is selected, other users can still successfully search for text in the note using the OnBase Client, but they will not be able to view the note.
Disallow Update	Prohibits all other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

4. Click **Save** to save the note to the document and keep the **Notes** dialog box open, or **Save and Close** to save the note and close the **Notes** dialog box.

Notes Pane Viewer for OLE Documents

When viewing a document in the OLE document viewer, the notes on the document are listed in the **Notes** pane of the viewer. The OLE document viewer is used to display OLE documents such as Microsoft Office documents and PDF documents (depending on your configuration).

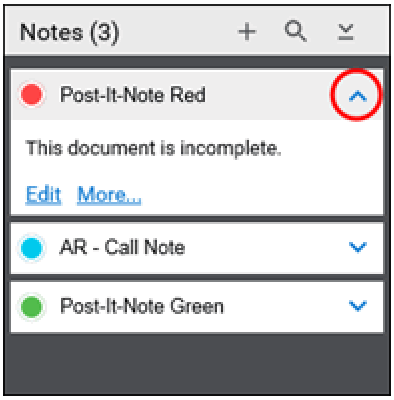
The **Notes** pane displays all of the notes on the document, and each note's color is displayed next to the name of the Note Type. The total number of notes is also displayed in the heading of the pane.



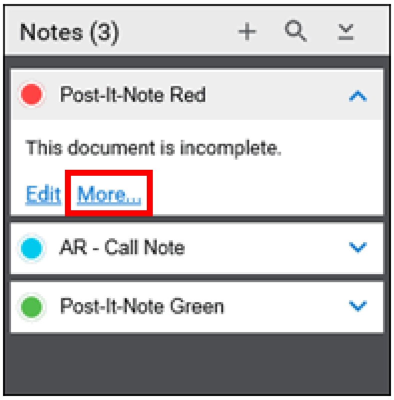
Note: The **Notes** pane only allows you to view the notes on the OLE document. To add, edit, or delete notes, you must use the **Notes** dialog box by clicking **Edit** on a note in the **Notes** pane, or clicking the **Note(s)** section of the status bar. For more information on using the **Notes** dialog box, see Notes Dialog Box on page 112.

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

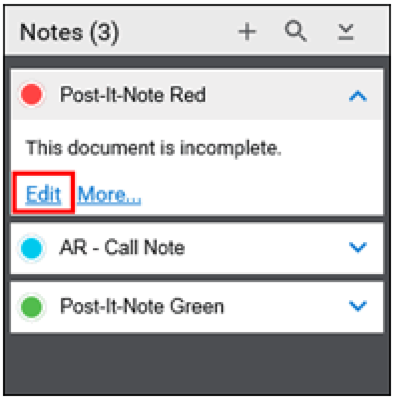
- To expand a note and view its contents, click the note in the **Notes** pane. Click the heading of the note again to collapse the note.



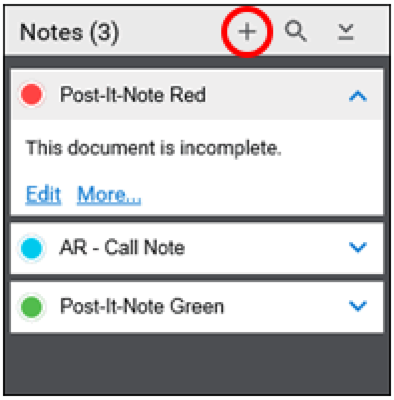
- To view additional information on a note, expand it and then click **More**. The note's icon, creation date and time, and creator's user name are displayed.



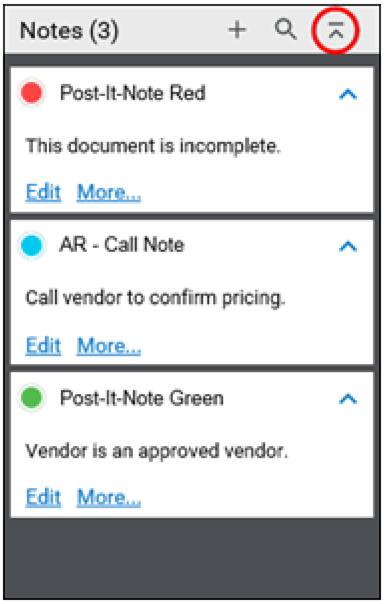
- To edit a note, expand the note and click **Edit**. The **Notes** dialog box is displayed, which allows you to edit the note.



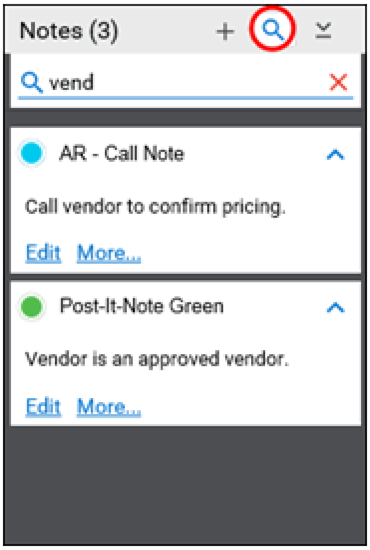
- To add a new note, click the **Add Note** button at the top of the **Notes** pane. The **Notes** dialog box is displayed, which allows you to create a new note.



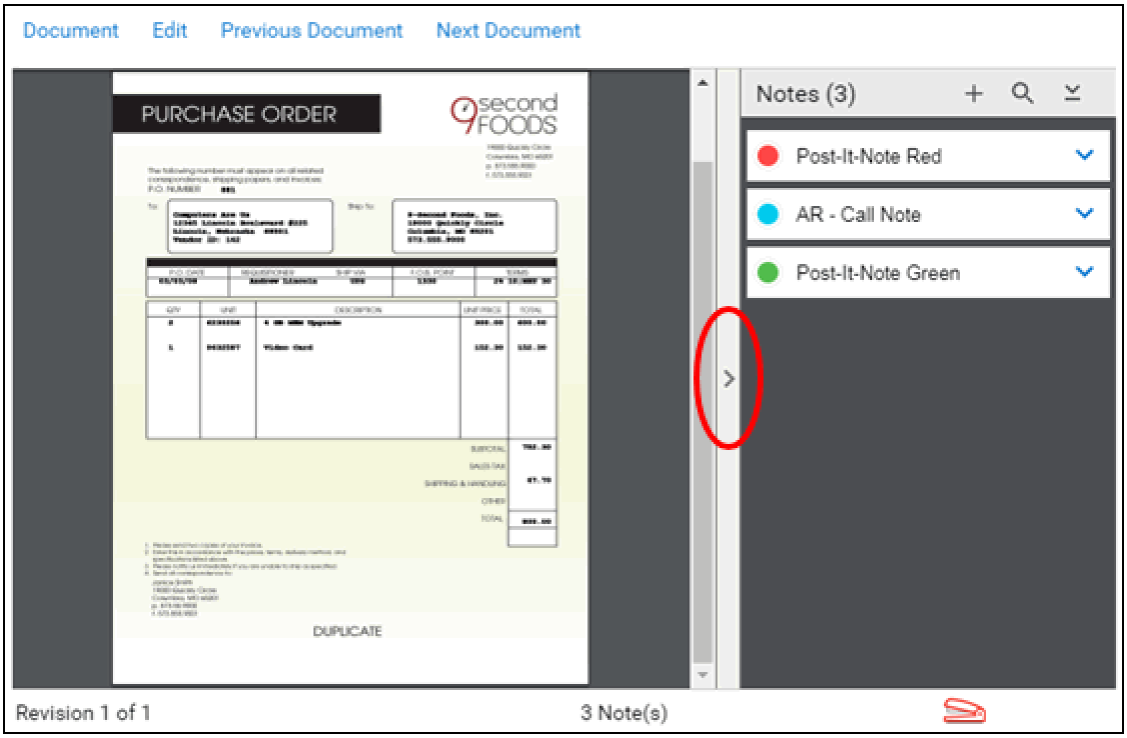
- To expand all notes, click the **Expand All** button at the top of the **Notes** pane. Click the button again to collapse all notes.



- To filter the list of notes, click the filter button at the top of the **Notes** pane and enter search terms into the **Note Text** field. The list is filtered to display only the notes that contain matching text. Click the red **X** to remove the filter.

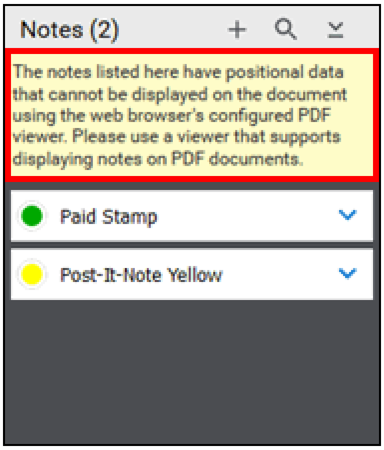


- To hide the **Notes** pane, click the handle next to the pane.



Click the handle again to expand the **Notes** pane.

- If any notes have specific positions on a PDF document, the **Notes** pane contains a notice explaining that the document viewer cannot display the position of these notes on the PDF. To display the positions of notes and note icons on a PDF document, use the Web Client PDF viewer instead of the web browser's PDF viewer. See your system administrator for more information.



Annotations

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

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

When enabled, the Notes toolbar displays annotation-related notes along the bottom of the viewer window.

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

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

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

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

Annotations Toolbar

The Annotations toolbar provides buttons for adding annotations or redactions to a document. You can show or hide the Annotations toolbar; by default it may be hidden.

For more information, see Creating an Annotation on page 128.

Note: If you are viewing a document that is locked by Records Management, the options on the Annotations Toolbar are selectable, but do not perform any tasks.

You can view, modify, or delete annotations the same way you do notes.

Button	Description
	**Toggle Redaction** lets you draw black or white rectangles over a portion of the document. The color of the redaction is determined by the adjacent drop-down list. You remain in redaction creation mode until you click the **Toggle Redaction** button again. This option is available for image documents only. You must have sufficient privileges to modify the document.
	**Save Redactions** saves any redactions that you have added to the document but not yet saved. You can save redactions only if the following requirements are met: • You have sufficient privileges to modify the current document. • The document is configured to allow redactions. • The document has an image or text report format.
	**Toggle Annotation** enables you to add one or more annotations to the document by selecting the annotation(s) from the adjacent drop-down list of available annotation types. You remain in annotation addition mode until you click the **Toggle Annotation** button again.

Note: Not all File Formats allow annotations. See your system administrator if the **Toolbars | Annotations** right-click option is not available.

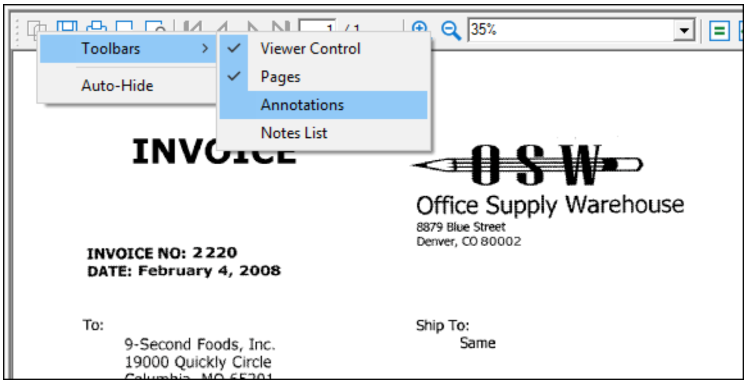
Creating an Annotation

If you have sufficient privileges, you can create annotations on text and image documents using the Annotations toolbar.

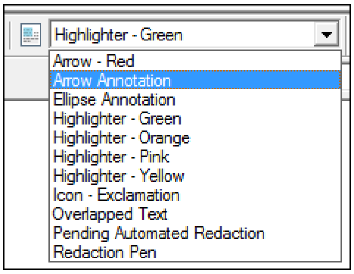
Annotation behavior differs slightly in the HTML Web Client. For more information about working with annotations in these cases, See Creating Annotations in the HTML Document Viewer on page 130.

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 133.

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 111.

3. Enable the selected annotation by clicking the **Toggle Annotation** button.

Tip: You can also create annotations using the Rubber Band feature if **Draw Annotation On Rubberband** is selected in Viewer Options. When this options is selected, you do not have to click the **Toggle Annotation** button to enable the annotation. To create the annotation using the Rubber Band feature, press **Ctrl** as you click and drag the pointer over the document. For more information, see Options Button - OnBase Viewer Options on page 176.

4. Using the pointer, define the location and size of the annotation by clicking and dragging the pointer over the document. Release the mouse button when finished to display the annotation.

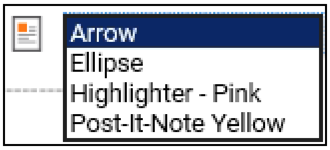
Note: Ensure that the annotation is large enough to be visible. Annotations are required to be a certain size before they can be created and saved.

Creating Annotations in the HTML Document Viewer

The HTML Document Viewer allows you to place annotations on text and image documents.

To create and place an annotation on a text or image document:

1. In the Document Viewer toolbar, select the type of annotation from the drop-down list:



2. Enable the selected annotation by clicking the **Toggle Annotation** button:

3. Using your mouse pointer, define the location and size of the annotation by clicking and dragging the pointer over the document. Release the mouse button when finished to display the annotation.

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

Moving and Resizing Annotations in the HTML Document Viewer

If you have appropriate privileges, and if an annotation is configured to be movable, you can move and resize annotations after they have been placed on a document.

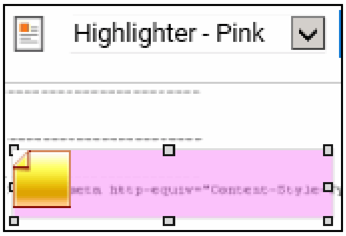
To move an annotation on a document, do one of the following:

- Click and drag the annotation to a new location.
- Double-click the annotation, then use the arrow keys on the keyboard to move the annotation to a new location.

Tip: When using the arrow keys on the keyboard to move an annotation, press and hold the **Ctrl** key while pressing the arrow keys to move the note more quickly.

To resize an annotation on a document, do the following:

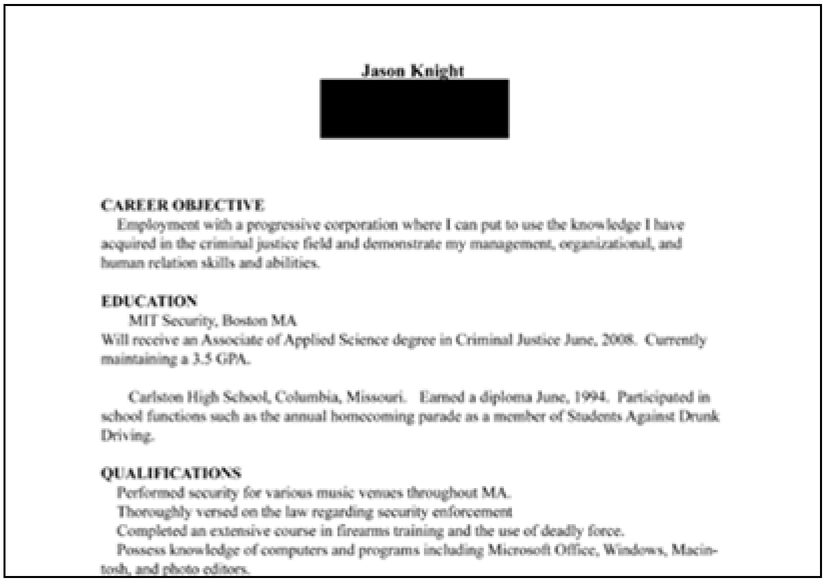
1. In the Document Viewer, double-click the annotation you want to resize. The annotation is selected.



2. Click and drag the edges or corners of the annotation until the annotation is the correct size. The mouse pointer changes to indicate the direction in which the annotation can be resized.
3. When you are finished resizing the annotation, click a different area of the screen to deselect the annotation.

Redactions

A redaction is a special kind of annotation used to hide confidential information on an image or text document. A redaction is a permanent black or white rectangle that obscures an area of the document. Redactions can be added in both HTML and ActiveX environments.



Jason Knight

[redacted]

CAREER OBJECTIVE

Employment with a progressive corporation where I can put to use the knowledge I have acquired in the criminal justice field and demonstrate my management, organizational, and human relation skills and abilities.

EDUCATION

MIT Security, Boston MA
Will receive an Associate of Applied Science degree in Criminal Justice June, 2008. Currently maintaining a 3.5 GPA.

Carlston High School, Columbia, Missouri. Earned a diploma June, 1994. Participated in school functions such as the annual homecoming parade as a member of Students Against Drunk Driving.

QUALIFICATIONS

Performed security for various music venues throughout MA.
Thoroughly versed on the law regarding security enforcement
Completed an extensive course in firearms training and the use of deadly force.
Possess knowledge of computers and programs including Microsoft Office, Windows, Macintosh, and photo editors.

Redactions can be created and saved on image documents, text documents, and Image Rendered PDFs that are part of Document Types configured to allow redactions. See your system administrator to verify whether a Document Type has been configured for redactions.

A redaction cannot be deleted (or undone) once it has been saved. When a redaction is saved, the redacted document is stored either as a new document in another Document Type or as a revision of the current document. How the redacted document is stored depends on your system's configuration.

Note: Depending on your system's configuration, redaction annotations may be available from the annotations drop-down list. These annotations are supported only in the OnBase Client and Unity Client and should not be used for creating permanent redactions in the Web Client.

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

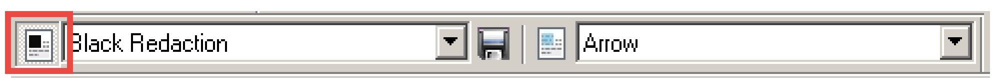
Creating a Redaction

You can apply and save redactions to a document if all of the following conditions are met:

- You have sufficient privileges to modify the document.
- The document's file type supports redactions. Only image and text files can be redacted.
- The document's Document Type is configured to allow redactions.

Note: You can print redacted documents on an ad hoc basis even if their Document Types are not configured for redactions. Apply the redactions, and then print the document. Then, close the document without saving the redactions.

1. Click the **Toggle Redaction** button from the Annotations toolbar.



2. From the redaction drop-down list, select whether you want to create a black redaction or a white redaction. If you select **Black Redaction**, the redacted area will be defined by a black, opaque rectangle. If you select **White Redaction**, the redacted area will be defined by a white, opaque rectangle.
3. Using your mouse, define the location and size of the redaction by clicking and dragging the pointer over the area you want to redact. Repeat for each area you want to redact.
4. Save the redacted image by clicking the **Save Redaction** button.
   - OnBase displays the message **Your redaction has been saved successfully**, indicating that the redacted document has been created. Depending on your system's settings, this redacted document is saved to another Document Type (the original document may also be deleted in this scenario), is saved as a revision of the current document, or replaces the original document.

Note: If your system is configured to save the redacted document as a revision, you may lose annotations or notes that were applied to the original document. See your system administrator for questions regarding redaction settings.

- If OnBase indicates that the redaction could not be saved, the Document Type may not be configured for redactions.
- If the document is closed or refreshed before one or more redactions have been saved, a message box prompts you to **Save Redactions** or **Close**. To save all created redactions, click **Save Redactions**. To discard them, click **Close**.

Note: In the HTML Viewer, if you switch between Overlay and Non-Overlay modes, a message is displayed indicating that the redaction will be removed.

Staples

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

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

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

When using staples, consider the following:

- The Staple icon and staple note are placed on the primary document, and a Back Staple icon and back staple note are placed on secondary documents.
- For documents consisting of multiple revisions, Staple icons appear on all revisions. When viewing a stapled document from any revision of an open document, the latest available revision of the stapled document is displayed.
-
- When printing a document using the HTML Web Client, Staple icons will not be printed when selecting **Note Icon/Annotation on Document** in the **Print Settings**.
- Not all file formats support using staples. See your system administrator to verify whether your document supports using staples.

Working with Staples

Staple behavior differs slightly depending on the type of documents being stapled. Most image documents can stapled from open documents, but certain document types (such as OLE documents or E-Forms) must be stapled using the stapler icon. For information about working with notes in these cases, see Stapling Documents with the Stapler Icon on page 135.

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.

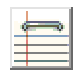
Note: The initial document cannot be an OLE document or E-Form. To staple an OLE document or E-Form to another document, see Stapling Documents with the Stapler Icon on page 135.

2. Open the secondary document(s) that you want to staple to the initial document.

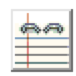
Note: To staple documents, you must have both images open in separate Document Viewer windows. If you are working with documents in the Web Client, you can right-click a document from a Document Search Results list and select **Open in New Window**.

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.



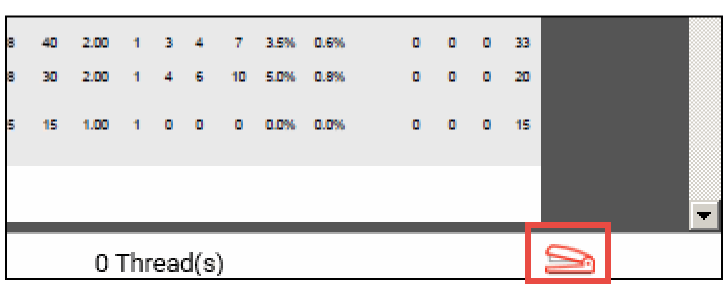
Stapling Documents with the Stapler Icon

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.

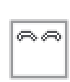
1. Open the initial document to which other documents will be stapled.
2. Open the secondary document(s) that you want to staple to the initial document.

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.

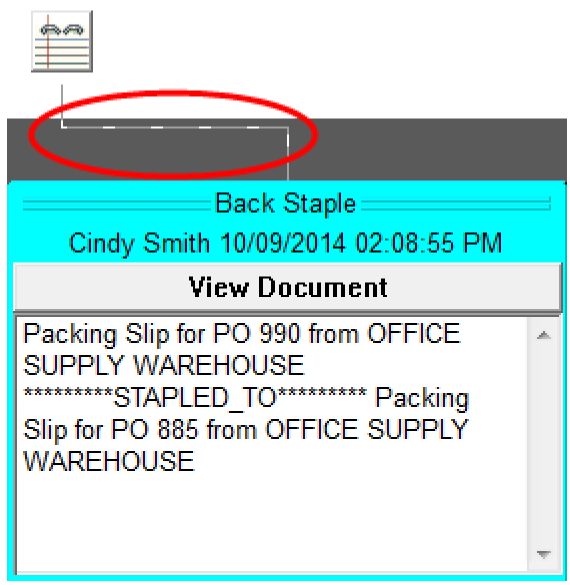


Viewing Stapled Documents

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.

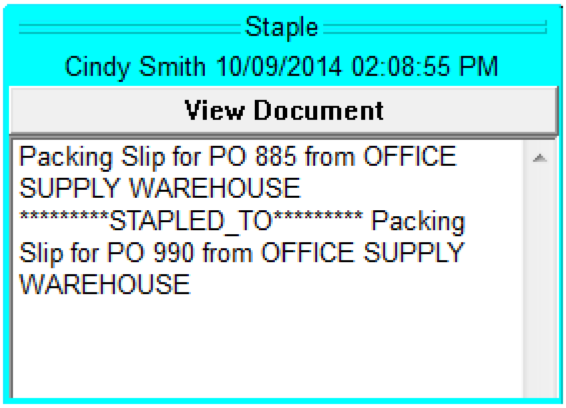
Note: Note labels may vary depending on the Auto-Naming conventions for your system.

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.