Web Client
COPYRIGHT

Information in this document is subject to change without notice. The OnBase® Information Management System software described in this document is furnished only under a separate license agreement and may be used or copied only according to the terms of such agreement. It is against the law to copy the software except as specifically allowed in the license agreement, or without the expressed written consent of Hyland Software, Inc. If Hyland Software, Inc. and you have entered into a nondisclosure agreement, then this document or accompanying materials provided by Hyland Software, Inc. contains certain information which is confidential information of Hyland Software, Inc. and which may be used or copied only according to the terms of such nondisclosure agreement. All data, names, and formats used in this document’s examples are fictitious unless noted otherwise. Complying with all applicable copyright laws is the responsibility of the user. Without limiting the rights under copyright, no part of this document may be reproduced, stored in or introduced into a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise), or for any purpose, without the express written permission of Hyland Software, Inc.

©2011 Hyland Software, Inc. All rights reserved.

Depending on the modules licensed, The OnBase® Information Management System software may contain portions of: Imaging technology, Copyright © Snowbound Software Corporation; CD-R technology, Copyright © Sonic Solutions; CD-R technology, Copyright © Rimage Corporation; OCR technology, Copyright © Nuance Corporation; Mail interface technology, Copyright © Intuitive Data Solutions; Electronic signature technology, Copyright © Silanis Technology, Inc.; Full text search technology, Office core assembly, ASP.NET extensions, application blocks, smart client architecture, Object Builder, and WPF controls, Copyright © Microsoft Corporation; Full Text Indexing technology, Copyright © Verity, Inc.; SYBASE Adaptive Server Anywhere Desktop Runtime, Copyright © SYBASE, Inc., portions Copyright © Rational Systems, Inc.; ISIS technology, Copyright © EMC Corporation; JLex technology, Copyright © 1996-2003 by Elliot Joel Berk and C. Scott Ananian; A2iA CheckReader, Copyright © A2iA; Terminal emulation technology, Copyright © Attachmate; User interface controls, Copyright © Infragistics; Terminal emulation technology, Copyright © NetManage; CAD document technology, Copyright © Open Text Corporation; ISIS scanning interface, Copyright © Pegasus Imaging Corporation; CD/DVD burner technology, Copyright © Prassi Software Incorporated; Code obfuscation technology, Copyright © PreEmptive Solutions; Icon library, Copyright © Professional Icons; OSA dlls, Copyright © Sharp Electronics Corp.; JAVA components, Copyright © Sun Microsystems; Signature pad technology, Copyright © Topaz Systems Incorporated; and User interface tools, Copyright © Xceed Software, Incorporated.

Portions of the OnBase® software modules may be covered by one or more of the following U.S. Patents: 7,644,091 and 7,765,271. Portions contained within OnBase® are licensed by U.S. Patent Nos. 6,094,505; 5,768,416; 5,625,465 and 5,258,855.

Hyland Software® and OnBase® are registered trademarks of Hyland Software, Inc. Application Enabler™ is an unregistered trademark of Hyland Software, Inc. EMC Centera® is a registered trademark of EMC Corporation. All other trademarks, service marks, trade names and products of other companies are the property of their respective owners.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Name</td>
<td>Web Client</td>
</tr>
<tr>
<td>Department/Group</td>
<td>Documentation</td>
</tr>
<tr>
<td>Revision Number</td>
<td>11.0.0</td>
</tr>
<tr>
<td>Part Number</td>
<td>WCRM-11.0.0-OB</td>
</tr>
</tbody>
</table>

©2011 Hyland Software, Inc.
# Exposure

## INTRODUCTION

- Superior Searching Capability
- Dynamic Work Space with Flexible User Interface
- User Groups and Rights Control User Access to Features
- Keyword Functionality Increases Document Management Efficiency
- Add Notes or Annotations to Documents
- Redact Areas of Documents
- Mail Documents from within the System
- Logging on to OnBase
- Logging Out of Web Client - Exit Button

## DEFINITIONS

- Annotations
- AutoFill Keyword Set
- AutoFill Keyword Set Instance
- Cascading Data Sets
- Cross-Reference
- HTML-Based Documents
- Custom Queries
- Document
- Document Type
- Document Handle
- Dynamic Folder
- Envelope
- External Text Search Definition
- Folder Definition
- Folder Hierarchy
- Folder Contents
- Internal Text Search Definition
- Keyword Data Sets
- Keyword Types and Keyword Values
- Keyword Types
- Keyword Values
- Multi-Instance Keyword Type Groups

---

©2011 Hyland Software, Inc.
Table of Contents

OLE Documents ............................................................................................................................... 16
Overlay ................................................................................................................................................ 16
Staples .................................................................................................................................................. 17
Static Folder ........................................................................................................................................ 17
Text Documents ................................................................................................................................ 17
User ...................................................................................................................................................... 18
User Group ........................................................................................................................................... 18

Configuration and Usage

Web Client Options.......................................................................................................................... 19
Changing the Retrieval Default Date............................................................................................... 20
  To Change the Default Document Date or Date Range .............................................................. 20
Automatically Save Rotations .......................................................................................................... 23
  To Automatically Save Rotations .................................................................................................. 23
Saving the Size of Windows ............................................................................................................. 25
Changing Your Password ................................................................................................................ 27
Document Search Results Options.................................................................................................. 29
Object Translation ............................................................................................................................ 31

USING THE WEB CLIENT - OVERVIEW .................................................................................. 32
Navigation Bar - Getting Around the Web Client......................................................................... 32
  Context Drop-Down Select List .................................................................................................. 33
  Mode Drop-Down Select List and Panels ................................................................................ 34
  Vertical Tabs ................................................................................................................................. 35
  Navigation Bar Displayed ........................................................................................................... 36
  Navigation Bar Hidden ............................................................................................................... 37
  Document Viewer Displayed ....................................................................................................... 38
  Document Viewer Hidden .......................................................................................................... 39
Changing Context Views - Context Drop-Down Select List............................................................ 39
Assigning Favorites......................................................................................................................... 40
Access Mode Options - Mode Drop-Down Select List ................................................................ 41

DOCUMENT OPTIONS AND RIGHT-CCLICK MENUS................................................................. 43
  Display Options ............................................................................................................................ 43
  Working with Documents ........................................................................................................... 43
  Navigating Documents ............................................................................................................... 44
  Send/Export Options .................................................................................................................. 44
  Document Information ................................................................................................................ 44

VIEWING DOCUMENTS .............................................................................................................. 45
  Document Viewer ........................................................................................................................ 45
  Document Retrieval ..................................................................................................................... 47

©2011 Hyland Software, Inc.
Table of Contents

**Web Client**

- Document Retrieval by Keyword Value ................................................................. 47
- Document Retrieval by Document Handle ............................................................... 54
- Document Search Results List .................................................................................... 56
  - Viewing Documents .................................................................................................. 56
  - Previewing Documents in the Thumbnail Viewer .................................................. 57
  - Changing Thumbnail Viewer Options ..................................................................... 59
- Document Retrieval Using External Text Search ....................................................... 62
- Document Retrieval Using Note Search ..................................................................... 66
- Document Retrieval by Document Date ...................................................................... 70
  - Date Range Parameters and Corresponding Results .............................................. 71
- Keyword Types Relationship Examples in Document Retrieval ............................... 72
  - Cascading Data Set ............................................................................................... 72
  - Multi-Instance Keyword Type Group ...................................................................... 73
- Search Button ............................................................................................................. 74
- Clear All Button ......................................................................................................... 75
- Clear Keywords Button ............................................................................................. 76
- Showing or Hiding the Document Retrieval List ...................................................... 77
- Open in New Window ............................................................................................... 78

**Toolbars in the Web Client** .................................................................................... 79

- Viewer Control Toolbar............................................................................................ 79
- Notes Toolbar ............................................................................................................ 81
- Document Results Toolbar ....................................................................................... 82
- Internal Text Search Toolbar .................................................................................... 82
  - Performing an Internal Text Search ...................................................................... 83
  - Limiting Searches Using Text Search Options .................................................. 84
- Annotations Toolbar ................................................................................................. 87
- Column/Row Locking Toolbar .................................................................................. 88
  - Locking Columns ................................................................................................... 89
  - Locking Rows ....................................................................................................... 90
- Pages Toolbar - View Document Thumbnails ......................................................... 91
  - Show or Hide Thumbnails ..................................................................................... 92
  - Navigating the Document Using Thumbnails ..................................................... 92
  - Zooming Thumbnails .......................................................................................... 93
  - Reordering Pages in a Document Using Thumbnails ........................................... 93
  - Adding Pages to a Document Using Thumbnails ................................................ 93
  - Deleting Pages from a Document Using Thumbnails ......................................... 94
- Showing or Hiding Toolbars ..................................................................................... 94
  - Auto-Hide Toolbars .............................................................................................. 94
- Search Button .......................................................................................................... 96

©2011 Hyland Software, Inc.
## Table of Contents

- **Clear Keywords Button** .................................................................................................................. 96
- **Clear All Button** ............................................................................................................................... 96

### WORKING WITH DOCUMENTS ............................................................................... 97
- **Image Documents** .............................................................................................................................. 97
- **OLE Documents** ............................................................................................................................... 97
- **Text Documents** ................................................................................................................................ 98
- **Document Viewer Shortcuts** ...................................................................................................... 98

#### Navigating Documents .................................................................................................................. 98

#### Zooming In on / Out of Documents .............................................................................................. 99

#### Searching for Internal Text ........................................................................................................... 99

- **Deleting Documents** ....................................................................................................................... 100
- **Access Document Properties** ....................................................................................................... 100

#### Access Document Properties ...................................................................................................... 100

- **Retrieving Cross-Referenced Documents** .................................................................................. 103

#### From Image or Text-Based Documents ....................................................................................... 103

#### From E-Forms or HTML Documents ............................................................................................ 104

#### From PDF or OLE Documents ....................................................................................................... 104

- **Overlays** ........................................................................................................................................... 105

#### Apply an Overlay to a Document ................................................................................................ 105

#### Remove an Overlay from a Document ......................................................................................... 105

- **Renditions** ......................................................................................................................................... 106

#### Viewing Renditions ....................................................................................................................... 106

#### Importing Renditions .................................................................................................................... 106

- **Send To Options** ............................................................................................................................ 107

#### Display Considerations .................................................................................................................. 107

#### From an Open Document .............................................................................................................. 107

#### From the Document Search Results List ................................................................................... 108

- **Saving Documents to Files** ........................................................................................................... 109

#### Character Substitutions ................................................................................................................... 113

#### Content Type ..................................................................................................................................... 113

#### Notes on the Text/Plain Content Type ........................................................................................... 114

- **Print or Copy Sections of a Document Using Rubber Band** ....................................................... 115

#### Send To / Clipboard - Copying Documents to the Clipboard ....................................................... 117

#### Send To / Create New Document - Creating New Documents from Existing Documents .......... 118

- **Column/Row Locking Toolbar** ...................................................................................................... 119

#### Pages Toolbar - View Document Thumbnails .............................................................................. 120

#### Show or Hide Thumbnails ............................................................................................................. 121

#### Navigating the Document Using Thumbnails .............................................................................. 121

#### Zooming Thumbnails ..................................................................................................................... 122

#### Reordering Pages in a Document Using Thumbnails ................................................................. 122
**Table of Contents**

- **Adding Pages to a Document Using Thumbnails** .......................................................... 122
- **Deleting Pages from a Document Using Thumbnails** .................................................. 123

  Considerations for Adding Pages to a Document Using Thumbnails .................................. 123
  Open in New Window ........................................................................................................ 123
  Options Button - Viewer Options ...................................................................................... 123

  **Changing Thumbnail Size** .............................................................................................. 124
  **Change Zoomed Thumbnail Size** .................................................................................... 125

- **Display Options for Notes and Annotations** ................................................................. 126

  Show Note Icons and Annotations When Open ................................................................. 126
  Always Show Note Icons and Annotations ....................................................................... 127
  Draw Annotation On Rubberband ...................................................................................... 127

  **Retaining the Zoom Region from Page to Page** ............................................................ 127

- **Navigate** ......................................................................................................................... 127
- **Scale** .................................................................................................................................. 128
- **Process** ............................................................................................................................ 129
- **Display** ............................................................................................................................ 130

  **Show Folder Locations** .................................................................................................. 131
  Keyword Considerations for Show Folder Locations ......................................................... 131

- **Working with Keywords** ................................................................................................. 132

  Access a Document's Keyword Values ............................................................................. 132
  Adding and Modifying Keywords ....................................................................................... 133

- **Document Date** ............................................................................................................... 134

- **Keywords** ......................................................................................................................... 134

  Viewing and Editing Keywords for HTML Documents ...................................................... 135
  Mixed Case Keywords .......................................................................................................... 135

- **Searching on Mixed Case Keyword Values** .................................................................. 136

  With Case Sensitive Searching Applied ............................................................................ 136
  Without Case Sensitive Searching Applied ......................................................................... 136

  **Indexing Mixed Case Keyword Values** ........................................................................ 136

  Masked Keywords ................................................................................................................. 136
  Viewing Read-Only Keywords ............................................................................................. 137
  Records of Information Using Multi-Instance Keyword Type Groups .............................. 140
  AutoFill Keyword Set Instance ......................................................................................... 140

  **Using AutoFill Keyword Sets when Indexing or Re-Indexing** ...................................... 140

  Indexing with AutoFill Keyword Sets .............................................................................. 141
  Re-Indexing with AutoFill Keyword Sets .......................................................................... 143

  Use Keywords for Document Retrieval ............................................................................... 144

- **Keyword Types that Contain Relationships** ................................................................. 144

  Cascading Data Sets ............................................................................................................. 144
  Multi-Instance Keyword Type Groups .................................................................................. 144

- **Common Keyword Types for Document Type Groups and Multiple Document**
Table of Contents

*Types* .................................................................145

*Add Another Value to a Keyword* ................................................145

Multi-Instance Keyword Type Groups ........................................145

*Using Drop-Down Select Lists* ......................................................146

Keyword Operators and Extended Search Features ....................147

Relational (Comparative) Operators ............................................147

Logical (Boolean) Operators .......................................................148

Wildcard Characters ................................................................149

Adding Multiple Values to a Keyword Type ................................149

**RE-INDEXING** .................................................................151

Re-Indexing Documents ..........................................................151

*Keywords with Drop-Down Select Lists* ......................................154

Considerations for Re-Indexing Documents and Adding or Modifying Keyword Values.. 154

**FOLDERS** ..................................................................158

File Cabinet ........................................................................158

Static Folder ........................................................................158

Dynamic Folder ......................................................................159

Auto-Foldering .......................................................................159

Related Folders .....................................................................159

Opening File Cabinets and Folders ...........................................160

*Opening the Folders Window* ..................................................160

*Opening a Folder* ................................................................162

*Opening Multiple Folders Windows* .........................................163

*Opening Documents and Folders in New Windows* ..................163

*Moving Up a Level from a Folder Tab* .......................................164

*Clearing a Selected Document or Folder* ................................164

*Accessing Folder Search by Clicking a Folder* .........................165

*Working with Folder Pop-up Lists* ............................................166

Searching for Folders ................................................................167

Retrieving Related Folders ........................................................169

Applying a Folder Template .......................................................170

Applying Folder Filters .............................................................171

Adding and Removing Documents .............................................172

*Adding Documents to Dynamic Folders* ..................................173

*Adding Documents to Static Folders* ........................................173

If You Cannot Add a Document to a Folder ................................174

*Copying or Moving Documents to Folders* ...............................176

*Removing Documents from Folders* ........................................178

Adding and Deleting Folders ......................................................179

*Adding a Folder* ................................................................179

*Deleting a Folder* ................................................................180
# Table of Contents

**Web Client**

- Changing Folder Keyword Values .......................................................... 181
- Printing Folder Contents ........................................................................ 183
- Search Button ......................................................................................... 184
- Clear Keywords Button ......................................................................... 184
- Clear All Button .................................................................................... 184

**Sending and Receiving Mail** .............................................................. 185

- Send To | Internal User ......................................................................... 185
  - Sending OnBase Documents to Other OnBase Users ......................... 186
  - Sending Messages to Other OnBase Users ........................................ 188
- Checking Internal Mail ........................................................................... 190
  - Deleting Mail ...................................................................................... 191
- E-Mailing Documents ............................................................................ 192
  - E-Mailing a Document ........................................................................ 192
  - Attachment Display Considerations .................................................. 195

**Envelopes** ......................................................................................... 196

- Envelope ............................................................................................... 196
- Creating and Deleting Envelopes ........................................................... 197
  - Creating a New Envelope .................................................................... 197
  - Deleting an Envelope ......................................................................... 199
  - Sharing an Envelope .......................................................................... 200
- Envelopes - Adding or Removing Documents ........................................ 202
  - Adding Documents to Envelopes ....................................................... 202
  - Removing Documents from Envelopes .............................................. 203
- Send To Envelope - Adding Documents to an Envelope ....................... 205

**Notes, Annotations, and Markups** .................................................... 206

- Notes Overview ..................................................................................... 206
  - Note Icons ......................................................................................... 207
  - Options ............................................................................................. 207
- Notes Toolbar ........................................................................................ 208
- View Notes - Open and View Notes or Annotations ............................... 208
  - Viewing Notes .................................................................................. 209
  - Moving Notes .................................................................................. 210
- Adding Notes, and Editing or Deleting Notes/Annotations .................... 210
  - Add a Note to a Document ............................................................... 212
  - Add a Note to an HTML Document ................................................ 213
  - Edit Note or Annotation Text .......................................................... 214
  - Editing Note Type Privacy Options .................................................. 215
  - Deleting a Note ................................................................................ 215
- Notes Dialog Box .................................................................................. 216
  - Viewing a Note from the Notes Dialog Box ...................................... 216
  - Adding a Note Using the Notes Dialog Box ...................................... 217
Table of Contents

Web Client

Editing a Note Using the Notes Dialog Box .....................................................219
Deleting a Note from the Notes Dialog Box ..................................................... 220
Annotations ...........................................................................................................221
Annotations Toolbar ................................................................................................... 222
Creating an Annotation .............................................................................................. 222
Redactions .................................................................................................................... 224
Creating a Redaction ................................................................................................. 225
Staples ............................................................................................................................... 226
Working with Staples ................................................................................................. 226
Stapling Documents ................................................................................................. 226
Viewing Stapled Documents ..................................................................................... 228
Moving Staple Notes ................................................................................................. 229
Editing Staples .............................................................................................................. 229
Deleting a Staple ........................................................................................................ 229
CUSTOM QUERIES AND TEXT SEARCHING...........................................................230
Document Retrieval Using Custom Queries ............................................................. 230
Conducting a Custom Query ................................................................................... 230
Conducting a Custom Query with a Text Search .................................................... 236
Viewing Recent Query History ............................................................................... 240
Internal Text Search Definition ............................................................................... 240
Internal Text Search Toolbar ................................................................................... 240
Performing an Internal Text Search ........................................................................ 241
Limiting Searches Using Text Search Options ...................................................... 242
External Text Search Definition ............................................................................... 245
Document Retrieval Using External Text Search .................................................... 245
External Text Search Report ..................................................................................... 249
Wildcard Characters .................................................................................................. 250
IMPORTING DOCUMENTS .....................................................................................252
INDEXING BATCHES .............................................................................................256
Accessing the Indexing Panel .................................................................................. 256
Indexing Panel Overview ......................................................................................... 258
Indexing Toolbar Options ....................................................................................... 261
Indexing Batches ......................................................................................................... 263
Re-ordering Pages ..................................................................................................... 269
Double-Blind Indexing ............................................................................................... 269
Double-Blind Indexing with Multi-Instance Keyword Type Groups ..................... 271
Deleting Batches ......................................................................................................... 271
Does Not Exist in the Database ................................................................................ 272
PRINTING..............................................................................................................273
Printing Documents ................................................................................................... 273
# Web Client Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-Forms not Printing Correctly</td>
<td>278</td>
</tr>
<tr>
<td>Print or Copy Sections of a Document Using Rubber Band</td>
<td>278</td>
</tr>
<tr>
<td>Sending Documents to Print Queues in the HTML Web Client</td>
<td>280</td>
</tr>
<tr>
<td><strong>Print Queue Dialog Box Options</strong></td>
<td>281</td>
</tr>
<tr>
<td>File Format not Supported for Printing</td>
<td>283</td>
</tr>
<tr>
<td><strong>REPORTS</strong></td>
<td>284</td>
</tr>
<tr>
<td>Creating List Reports</td>
<td>284</td>
</tr>
<tr>
<td>External Text Search Report</td>
<td>287</td>
</tr>
</tbody>
</table>

## Using the Core Services Office Add-In

**OVERVIEW** ........................................................................................................ 289  
Core Services Office Add-In Support in OnBase 11.0.0 ........................................ 289  
**USAGE** ............................................................................................................... 290  
Modifying a Non-Revisable Document ................................................................. 291  
Re-Indexing a Document into OnBase .................................................................. 292  
Adding Notes to a Document with the Office Add-In ........................................... 293  
**Adding Notes** ................................................................................................. 294  
**Editing Notes** ................................................................................................. 295  
**Deleting Notes** ................................................................................................. 296  
Searching Cross-References with the Office Add-In .......................................... 297  

## OnBase Usage Best Practices

**DOCUMENT RETRIEVAL** ......................................................................................... 299  
Dates ...................................................................................................................... 299  
Drop-Down Lists .................................................................................................... 299  
Wildcards ............................................................................................................. 299  
**IMPORTING** ....................................................................................................... 300  
Text Documents .................................................................................................... 300  
**INDEXING** ......................................................................................................... 300  
Multi-Instance Keyword Type Groups .................................................................. 300
INTRODUCTION

The Web Client is a Web-based document management system. You can use the Web Client to easily upload, organize and retrieve documents.

The Web Client's graphical tabbed interface provides a point-and-click environment for fast and simple navigation.
Superior Searching Capability

Document retrieval is easy and flexible using the Web Client. You can search for documents in a variety of ways, depending upon your needs.

<table>
<thead>
<tr>
<th>Button</th>
<th>Search Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Image" /></td>
<td>Document Retrieval</td>
<td>Search by Document Type Group, Document Type, Note Type, Keyword values, and/or Document Date.</td>
</tr>
<tr>
<td><img src="image" alt="Image" /></td>
<td>Custom Query</td>
<td>Custom Queries are predefined sets of search criteria that allow you to quickly access frequently retrieved documents.</td>
</tr>
<tr>
<td><img src="image" alt="Image" /></td>
<td>Envelope</td>
<td>Set up your own private organizational system by creating Envelopes and adding documents to the Envelope. You can retrieve the documents later by simply clicking on the Envelope.</td>
</tr>
<tr>
<td><img src="image" alt="Image" /></td>
<td>Folder</td>
<td>Folders provide easy retrieval for documents that meet specified criteria when they are stored into the system.</td>
</tr>
<tr>
<td><img src="image" alt="Image" /></td>
<td>Text or Note Search</td>
<td>Text and Note search tabs provide the ability to find documents based upon document or Note text.</td>
</tr>
</tbody>
</table>

- Upon searching for a document through any one of the available Search Types, documents that meet the criteria display in a list.

- When you open a document, it is displayed in a Document Viewer below the list. This provides the ability to quickly navigate through a list of documents, easily displaying one document after another.
Dynamic Work Space with Flexible User Interface

From the retrieval list, or an open document, you can perform a variety of activities through right-click menus, toolbars, and shortcut keys. You can:

- Show or hide toolbars.
- Navigate documents using toolbar buttons, shortcuts, or thumbnails.
- Rotate and resize documents.
- Expand or resize windows
- Open documents in multiple windows
- Lock columns or rows of text in large documents for easy review

For more information, see Document Options and Right-Click Menus on page 43.

Note: Depending on how the Web Client is configured, some toolbars and right-click options may be unavailable.

User Groups and Rights Control User Access to Features

The features, functions and documents a user is able to see or access depend on the user's Privileges and Product Rights, as well as the Web Client configuration and Licensing.

Keyword Functionality Increases Document Management Efficiency

In the OnBase Web Client, you can:

- View and edit Keyword Values.
- Use AutoFill Keyword Sets to increase indexing efficiency.
- Add more than one value to Keyword Types applied to documents. With Multi-Instance Keyword Groups, you can also preserve the integrity of records on documents with multiple Keyword Values, enabling more efficient retrieval to obtain the correct document quickly.
- Re-index documents to assign them to different Document Types, and make any associated changes to the Keyword Values or Document Dates.

Add Notes or Annotations to Documents

You can add Notes and custom Annotations to documents. Note and Annotation text is searchable for retrieval purposes.
Redact Areas of Documents
Create redactions on documents that need to have certain areas hidden from view.

Mail Documents from within the System
E-mail documents through your own e-mail system as attachments to messages.

Note: The specific options available depend on the Document Type, its file format, and your user rights. Document Type Groups, Document Types, Custom Queries and Folder Types are set up by your system administrator.

Logging on to OnBase
To access documents through the Web Client, you must first log on to OnBase.

1. From the logon Web site, in the User Name field, type your User Name.
2. In the Password field, type your password.
3. Click Login. The Web interface is displayed.

Note: The first time you log on to the system, you are prompted to read the End User License Agreement and click OK to continue, before you are permitted access to the Web Client.

Logging Out of Web Client - Exit Button
When you are finished working, you can log out by clicking the Exit button in the main Web Client toolbar.
Depending on how your system is configured, logging out may either return you to the URL where you logged on or close your Web browser.
DEFINITIONS

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.

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.

**Note:** If an Arrow, Ellipse, or Highlight note type is configured to display an icon along with the annotation, the annotation can only be moved by clicking and dragging the icon. If the icon is not displayed, the annotation can be moved by clicking and dragging the annotation itself.
**AutoFill Keyword Set**

AutoFill Keyword Sets are used to automate and standardize data entry.

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

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

**AutoFill Keyword Set Instance**

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

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

**Cascading Data Sets**

A Cascading Data Set is a set of Keyword Types where the values available in a drop-down list for one Keyword Type vary depending on the value selected from the drop-down list for the previous Keyword Type on the document or folder. These Keyword Types are arranged to show a parent/child relationship.

For example, if State, County, and City are listed as Keyword Types and displayed in that order, then the available County values depend on the selected State, and the available City values depend on the selected County.

**Note:** Changing a Keyword Value will not update the child values that depend on it. For example, if you change the State after selecting the County, then the County will retain its original value and will not be updated to reflect the new State.
Cross-Reference

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

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

HTML-Based Documents

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

Custom Queries

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

Document

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

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

Document Type

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

Document Handle

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

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

- A dynamic folder contains all documents that match specified Keyword Value criteria and Document Types. Whenever the folder is opened, its contents are updated automatically.

- Documents that are automatically pulled into a dynamic folder are not physically moved. The folder just provides another way for users to easily access the document.

- For documents to be added manually to a folder from within OnBase, the Folder Type must be static or both static and dynamic.

  If a folder is both static and dynamic, documents whose Keyword Values do not match the folder’s can be placed in the folder manually. If a folder is dynamic only, documents cannot be manually placed in or removed from the folder from within OnBase.

Envelope

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

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

- Because the entry in an envelope is actually a pointer to the document stored in its Document Type Group, deleting a document from an envelope will not delete the document from OnBase.

- Similarly, adding documents to envelopes does not duplicate the document in OnBase.

- There is no limit to the amount or type of documents that can be placed in one envelope.

- You can add a document to more than one envelope.
External Text Search Definition

The External Text Search function allows you to search for text across text-based documents of a selected Document Type. Text-based documents include, but are not limited to, all documents with the following formats:

- Text Report Format
- Dynamic Document
- XML
- AFP
- PCL

Note: External Text Search is not available for PCL documents in the OnBase Web Client or Desktop.

See also: Internal Text Search Definition on page 10

Folder Definition

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

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

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

In the illustration above, a folder named Bank Branches is the parent to the Customer Accounts folder, which is the parent to Statements folder. The Statements folder is the child to Customer Accounts, and Customer Accounts is the child to Bank Branches. Notice Customer Accounts is both a parent and a child folder, depending on the context.

Folder Contents

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

Internal Text Search Definition

The Internal Text Search function allows you to locate search text in an open text-based document, including PCL and other plain text documents or ASCII file formats.

See also: External Text Search Definition on page 9.

Keyword Data Sets

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

Keyword Types and Keyword Values

Keyword Types and Keyword Values provide the ability to assign descriptions to documents. Effective indexing and classification of Document Types is essential for efficient document management and retrieval.
The system administrator assigns all Keyword Types to documents in your system.

**Keyword Types**

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

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

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

---

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

---

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

---

**Keyword Values**

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

- Some Keyword Types require their values to be a specific format, such as a date, a number, or a currency value.
- Some Keyword Types will have default values assigned to them, so when you import a document into the system, the default value is displayed in the Keyword Type field.
- Some Keyword Values display automatically on an open document.

---

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

---

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

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

Each Keyword Type in the Keyword Type Group can have only one value, unless the group is a Multi-Instance Keyword Type Group.

For information about using Keyword Type Groups on folders, see the folders help topics.

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

Multi-Instance Keyword Type Groups

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

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

- See the Example of adding an additional Record to a Document Type (the Keyword Type Group must be Multi-Instance) on page 12.
- See the Keyword Types Relationship Example in Document Retrieval on page 14.

Note: Multi-Instance Keyword Type Groups are, by default, displayed in an expanded state when OnBase is in an indexing mode (e.g., in the Document Imaging window, the Import Document dialog box, the Re-index Document dialog box and the Create New Document from Existing dialog box). Multi-Instance Keyword Type Groups are also displayed in an expanded state when creating a new folder in the OnBase Client. All other instances (e.g., the Document Retrieval pane, the Add/Modify dialog box) can be configured to display the Keyword Values in the Keyword Type Groups either expanded or collapsed. If the Keyword Values are configured to display in a collapsed state, click the Expand symbol or press Ctrl+O to show the entire group. Multi-Instance Keyword Type Groups are, by default, configured to display the name of the Multi-Instance Keyword Type Group value when collapsed. Multi-Instance Keyword Type Groups can be configured to display the primary Multi-Instance Keyword Type Group value when collapsed.

Example of adding an additional Record to a Document Type (the Keyword Type Group must be Multi-Instance)

This example uses a Document Type called Checking Statement. The Multi-Instance Keyword Type Group called Customer Information is applied to Checking Statement.
The **Customer Information** Keyword Type Group is the record of the person holding the Checking Account and contains the Keyword Types **Customer Name, Address, City, State** and **ZIP Code**.

If you want to add a spouse's record to a **Checking Statement** document, you can duplicate the Keyword Type Group to add the additional record to the document.

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

A Document Type contains a Multi-Instance Keyword Type Group that includes the Keyword Types **Account Number, First Name, and Last Name**. If you were to search for First Name **John** and Last Name **Adams**, a document retrieval would only retrieve documents that contained the record of **John Adams**. It would not retrieve documents that only contained the First Name **John** and Last Name **Adams** on the same document. They would have to be in the same record.
For example, the following documents contained the same Keyword Values.

- Document A was configured with a Multi-Instance Keyword Type Group, and was indexed with two records.
- Document B was configured with individual Keyword Types and was indexed with multiple values for First Name and Last Name.

A document retrieval for John Adams would not find Document A. It would find Document B.

Note

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

You can place a note anywhere on a text, HTML-based, or image document. Notes remain associated with the page on which they were created, unless they were otherwise configured. For example, if the note was created on page 1 of a two-page document, the note icon appears only on page 1.
Notes added to OLE documents stay attached to the toolbar or float in the location to which they were moved.

**Caution:** If an image document, or page, is appended to another image document, then all notes associated with that document/page will be lost.

Notes are displayed on all renditions of a document.

**Note:** A note has a maximum character length of 250 characters. If a note appears truncated, it is because the note has been configured to use variable text. The variable text is causing the note to exceed the maximum character length of 250 characters. If you are experiencing truncated notes, contact your system administrator.

**OLE Documents**

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

When you open an OLE document in OnBase, the document is displayed in a viewer based on the document’s source application. The document’s right-click options are specific to the source application. OnBase options can be accessed by right-clicking the document in a Document Search Results list.

For open OLE documents, you can access OnBase options from the **File** and **Document** menus in the OnBase Client, the OLE/PDF Viewer Control toolbar in the OnBase Desktop, or the **Document** and **Edit** menus in the Web Client.

To modify, revise, re-index, add notes to, and find cross references for Office documents opened from the OnBase Web Client, use the Core Services Office Add-In, the Office Business Application for 2003, the Office Business Application for 2007, or the Office Business Application for 2010.

**Overlay**

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

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

Stapled documents are only logically linked. The documents remain separate.

Not all file formats can use staples. See your system administrator to verify whether or not your document can use staples.

Static Folder

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

- You can add OnBase documents to a static folder using the OnBase Client, Desktop, Web Client, and Unity Client.
- Adding a document to a folder does not physically move the document. Rather, the folder provides another way for users to easily access the document.
- Documents residing in a static folder do not have to share the same Document Type or Keyword Values.

Text Documents

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

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

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

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

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

User Group

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

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

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

This section provides the configuration available from the Web Client. All other configuration is performed by the system administrator in the Configuration module.

Web Client Options

You can change your Web Client logon password or change the default document date by clicking User in the context drop-down select list in the Navigation Bar. The Navigation Bar displays the User context view.

From here, you can change your password or your default date range for document retrieval. These procedures are covered in the following topics

- Changing Your Password on page 27
- Changing the Retrieval Default Date on page 20
- Automatically Save Rotations on page 23
The User context also lets you view documents using your OnBase inbox and envelopes, which are covered in the following topics:

- Checking Internal Mail on page 190
- Envelopes on page 196

**Changing the Retrieval Default Date**

The Document Date is the date assigned to a document when it was imported into OnBase. The retrieval default date options let you change the default date available from Document Retrieval.

Your system administrator has defined a default document date or date range to be used for document retrieval. You can specify a different date or date range while you are performing an individual retrieval operation, but that date will be replaced by the default date the next time you access **Document Retrieval**. You can save a different default retrieval date through your user options. This is helpful if you frequently search for documents from the same date or date range.

**To Change the Default Document Date or Date Range**

1. In the context drop-down select list in the Navigation Bar, click the **User** button to switch to the User context.
2. Click **Options** in the mode drop-down select list.

The **Options** panel is displayed.
3. Click the date or date range selection you want in the option group for the default date. The following table explains the available options.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>No default date is used.</td>
</tr>
<tr>
<td>Last Weekday</td>
<td>The previous weekday is used as a default. Friday is considered the last day of the week.</td>
</tr>
<tr>
<td>Last Business Day</td>
<td>The previous business day is used as a default. Saturday is considered the last business day of the week.</td>
</tr>
<tr>
<td>Yesterday</td>
<td>Yesterday's date is used as the default date.</td>
</tr>
<tr>
<td>Today</td>
<td>Today's date is used as the default date.</td>
</tr>
<tr>
<td>First of the Month</td>
<td>The first day of the current month is used as the default date.</td>
</tr>
<tr>
<td>Last of the Month</td>
<td>The last day of the previous month is used as the default date.</td>
</tr>
<tr>
<td>Specific Day</td>
<td>The specified day is used as the default date.</td>
</tr>
<tr>
<td>Last Month</td>
<td>The date range of the previous month is used as the default date range.</td>
</tr>
<tr>
<td>Current Month</td>
<td>The date range of the current month is used as the default date range.</td>
</tr>
<tr>
<td>Current Week</td>
<td>The date range of the current week is used as the default date range.</td>
</tr>
<tr>
<td>Month to Date</td>
<td>The date range extends from the first day of the current month to the current date.</td>
</tr>
<tr>
<td>Year to Date</td>
<td>The date range extends from the first day of the year to the current date.</td>
</tr>
<tr>
<td>Last _ Days</td>
<td>The date range is determined by the number of days specified.</td>
</tr>
<tr>
<td>Last _ Weeks</td>
<td>The date range is determined by the number of weeks specified.</td>
</tr>
</tbody>
</table>
4. Click to save the changes. Default document date changes take effect immediately.

### Automatically Save Rotations

Depending on your system configuration, you may be able to rotate certain documents while viewing them. It is possible to configure your user account so that you automatically save any rotations you have made to a document when you close that document.

#### To Automatically Save Rotations

1. In the context drop-down select list in the Navigation Bar, click the User button to switch to the User context.
2. Click **Options** in the mode drop-down select list.

The **Options** panel is displayed.

3. Click the **Rotate Auto-Save** option. When this option is selected, all unsaved rotations on a document are automatically saved when the document is closed.

4. Click **Save** to save your changes.
Saving the Size of Windows

Depending on your system configuration, you may be able to save the size of certain windows you view. It is possible to configure your user account so that some new windows will automatically open as the same size of the last window you opened. To do so, follow these steps:

1. In the context drop-down select list in the Navigation Bar, click the User button to switch to the User context.
2. Click **Client Settings** in the mode drop-down select list.

   The **Client Settings** panel is displayed.

3. Select the **Clear Document Types After Import** option to automatically clear the Document Type value from the **Import Document** dialog box once a document is imported. If this option is not selected, the Document Type value will be maintained after the document is imported.

4. Select the **Clear Keywords After Import** option to automatically clear all Keyword Type values from the **Import Document** dialog box once a document is imported. If this option is not selected, the Keyword Type values will be maintained after the document is imported.

5. Select the **Results Window Size** option to save the size of the Document Search Results window. When this option is selected and you resize the Document Search Results window, the window will be displayed at that size the next time you open it.
6. Select the **Document Viewer Window Size (Open in New Window)** option to save the size of the Document Viewer window (this window is displayed when using the **Open in New Window** option. When this option is selected and you resize the Document Viewer window, the window will be displayed at that size the next time you open it.

**Note:** You can use the **Select All, Clear All, and Reset Selected Settings** buttons to quickly change multiple settings.

---

**Changing Your Password**

If you have appropriate privileges, you can change your OnBase logon password. Once you log out of the Web Client, you will need to use the new password to log on again. When you change your password, the new password is saved throughout the entire system.

**Note:** Depending on your User Name Configuration and System setup, this option may not be available to you. See your system administrator for further information.

1. Click the **User** button in the Context drop-down select list.

2. Click **Password** in the User mode drop-down select list.

3. The **Password** panel is displayed. In the **Old Password** field, type your current password.
4. In the **New Password** field, type the new password that you want to use in the future. Your new password can include any combination of printable characters, including those in the international character set. You can use spaces in your password, but you cannot begin or end your password with a space.

**Note:** The minimum length and maximum length for a password are set by your system administrator.

5. In the **Verify New Password** field, type the new password again. It must be exactly the same as what you typed into the **New Password** field.

6. Click ![Save](image)

**Note:** If password expiration is enabled in the system and your password has expired, the **Change Password** dialog will appear when attempting to logon. You will then be required to change your password before entering into the system.
**Document Search Results Options**

You can set default behavior for the user interface of the Documents Search Results list for the following items:

- The maximum number of documents displayed in a Document Search Results list
- Whether labels are displayed next to the Documents Search Results list buttons

1. Access Document Search Results list options by clicking the **Options** button in the Documents Search Results list toolbar.

   The **Options** dialog box is displayed.

2. In the **Results Per Page** field, enter the maximum number of documents to display per page of the Documents Search Results list. If a search retrieves more documents than this maximum, then the list is split into multiple pages.

   For example, the default setting of **50** means that if 125 documents were retrieved, then the Documents Search Results list would consist of three separate pages, with the first two pages containing 50 listings apiece and the last page containing 25.

   You can enter any number from **0-999**. If you enter **0**, it defaults to 50 items per page. The new setting takes effect the next time you retrieve documents.
Note: The Results Per Page setting may have been disabled by your system administrator.

3. Click the Font button to change the typeface, style, and size of text in the Document Search Results list.

- When you click this button, the Font dialog box is displayed. Choose the typeface, style, and size from their respective lists. The Sample field displays a preview of the selected settings.

![Font dialog box]

Note: The Script option is disabled because it is not applicable to the Document Search Results font.

- Click OK to return to the Options dialog box.
- To change the font back to its default settings, click the Default button from the Options dialog box.
4. Select an option for displaying toolbar buttons in the Documents Search Results list toolbar.
   
   - **No Text Labels** means the buttons will include only the graphics:
   
   ![No Text Labels Graphic]

   - **Show Text Labels** means the buttons will include both the graphics and their labels:

   ![Show Text Labels Graphic]

**Object Translation**

The Web Client module supports the Object Translation feature. You can use this feature to configure your system to display objects (such as Document Types, Note Types, and Custom Queries) based on each individual workstation’s Regional and Language Options. For more information on this topic, see the Database Translations topic in the System Administration documentation.
USING THE WEB CLIENT - OVERVIEW

This section provides information on all of the navigational tools available in the Web Client. See Toolbars in the Web Client on page 79 for additional information on functionality provided by toolbar buttons.

Navigation Bar - Getting Around the Web Client

The Navigation Bar is the main control panel for the Web Client. Point-and-click functionality in the Navigation Bar provides the ability to rapidly switch from one task to another. The Navigation Bar’s default position is on the left side of your screen. The Navigation Bar consists of three components - the Context Drop-Down Select List, the Mode Drop-Down Select List, and Panels.
Note: The Navigation Bar is specifically designed to be displayed on a screen whose pixel dimensions are at least 1280x1024. If you cannot see the entire Navigation Bar on your screen, you should change the screen dimensions.

See the following sections for more information on the specific components of the Navigation Bar:

- Context Drop-Down Select List
- Mode Drop-Down Select List and Panels

**CONTEXT DROP-DOWN SELECT LIST**

From the Context drop-down select list, select a mode to change the Context View.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="document.png" alt="Document" /></td>
<td>Click <strong>Document</strong> for the <strong>Document Retrieval</strong> view which accesses main Client functionality.</td>
</tr>
<tr>
<td><img src="folders.png" alt="Folders" /></td>
<td>Click <strong>Folders</strong> to open the Folders window and access file cabinets.</td>
</tr>
<tr>
<td><img src="user.png" alt="User" /></td>
<td>Click <strong>User</strong> for mail, envelopes, password and preferences.</td>
</tr>
<tr>
<td><img src="favorites.png" alt="Favorites" /></td>
<td>Click <strong>Favorites</strong> to access your home page and favorite page information.</td>
</tr>
<tr>
<td><img src="help.png" alt="Help" /></td>
<td>Click <strong>Help</strong> if you need help with a task.</td>
</tr>
<tr>
<td><img src="exit.png" alt="Exit" /></td>
<td>Click <strong>Exit</strong> to close the Web Client.</td>
</tr>
</tbody>
</table>
MODE DROP-DOWN SELECT LIST AND PANELS

The panel displays the Context View of the mode selected from the Context drop-down select list. Click the Mode drop-down select list to select a mode option.

Panels dynamically change to reflect the active task. Most user entry is performed in the Panels.

A vertical tab is displayed to the right of the Navigation Bar and to the right of the Document Viewer.

Clicking a tab toggles the corresponding pane to be maximized (displayed) or to be minimized (hidden):

- Click the vertical tab to the right of the Navigation Bar to toggle - display or hide - the Navigation Bar.
- Click the vertical tab to the right of the Document Viewer to toggle - display or hide - the Document Viewer.

When the Document Viewer is set to hide, the Document Viewer and Document Search Results list are displayed in a separate window when you search for or retrieve documents.

**Note:** See the following section for examples of how the screen looks with the Navigation Bar and the Document Viewer displayed or hidden.
Vertical Tabs
Navigation Bar Displayed
Navigation Bar Hidden

OnBase 11.0.0 Web Client

©2011 Hyland Software, Inc.

37
Document Viewer Displayed
Changing Context Views - Context Drop-Down Select List

The Web Client Context drop-down provides a set list of Context Views that enable you to start document retrieval, change your password and preference settings, access help information, and log out of the Web Client.
The drop-down select list is configurable, so in your system the same activities may be represented by different buttons. If you are licensed to use other modules or have user administration rights, there may be additional buttons besides those discussed here.

When you select a mode from the Context drop-down select list, the Navigation Bar dynamically changes to the selected Context View for that mode (except for Help and Exit.) By default, **Document Retrieval** is selected when you log on to the Web Client.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Document" /></td>
<td><strong>Document</strong> starts the process of document selection and retrieval.</td>
</tr>
<tr>
<td><img src="image" alt="Folders" /></td>
<td><strong>Folders</strong> opens the Folders window and enables you to access file cabinets.</td>
</tr>
<tr>
<td><img src="image" alt="User" /></td>
<td><strong>User</strong> enables you to change your password, set preference options, and access mail and envelopes.</td>
</tr>
<tr>
<td><img src="image" alt="Favorites" /></td>
<td><strong>Favorites</strong> accesses your home page and favorite page information.</td>
</tr>
<tr>
<td><img src="image" alt="Help" /></td>
<td><strong>Help</strong> accesses the HTML Help system for the Web Client.</td>
</tr>
<tr>
<td><img src="image" alt="Exit" /></td>
<td><strong>Exit</strong> logs you out of the Web Client.</td>
</tr>
</tbody>
</table>

**Assigning Favorites**

Favorites provide an easy way to navigate your OnBase solution. You can manually add contexts to your **Favorites** list for easy access. You can then navigate to your **Favorites** list and click on a favorite to immediately navigate to that context.

You can also configure one of your favorites as your **Home Page**, which will be displayed automatically upon logging on. Select the **Favorites** icon to open your **Favorites** drop-down menu and configure your **Favorites** list.
See the following table for a description of all available options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Add to Favorites" /></td>
<td>Select this button to add the currently displayed context to your <strong>Favorites</strong> list.</td>
</tr>
<tr>
<td><img src="image" alt="Configure" /></td>
<td>Select this button to configure the currently selected favorite as your home page. This page will be displayed the next time you log on to the Web Client.</td>
</tr>
<tr>
<td><img src="image" alt="Rename" /></td>
<td>Select this button to rename the currently selected favorite.</td>
</tr>
<tr>
<td><img src="image" alt="Delete" /></td>
<td>Select this button to delete the currently selected favorite from your <strong>Favorites</strong> list.</td>
</tr>
</tbody>
</table>

**Access Mode Options - Mode Drop-Down Select List**

Mode options provide an easy way to navigate from one task to another without having to open and close windows in the Web Client. Click on the mode option for additional information regarding its functionality.

Mode options display in the Mode drop-down select list, and reflect the options available in the current Context View (Retrieve mode or Options mode).

To select a mode option, select it from the Mode drop-down select list. The Navigation Bar dynamically updates to display the selected option.
**Note:** As with the buttons in the Context drop-down select list, the mode options you see depend on your User Groups and Rights and Licensing.

<table>
<thead>
<tr>
<th>Button</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Document Retrieval" /></td>
</tr>
<tr>
<td>Retrieve by Document Handle</td>
</tr>
<tr>
<td><img src="image" alt="Custom Queries" /></td>
</tr>
<tr>
<td>New Form</td>
</tr>
<tr>
<td><img src="image" alt="Document Templates" /></td>
</tr>
<tr>
<td><img src="image" alt="Import Document" /></td>
</tr>
<tr>
<td><img src="image" alt="Full-Text Search" /></td>
</tr>
<tr>
<td><img src="image" alt="Indexing" /></td>
</tr>
<tr>
<td><img src="image" alt="Documents Checked Out" /></td>
</tr>
<tr>
<td><img src="image" alt="Briefcase" /></td>
</tr>
</tbody>
</table>
**DOCUMENT OPTIONS AND RIGHT-CLICK MENUS**

OnBase document and right-click menu options can be accessed from various places in the Web Client. For example, open documents, toolbar buttons, the Document Options icon, or right-clicking a document in a list are all means of accessing menu options.

The following is a comprehensive list of all document options and right-click menu options available when licensed for the Web Client module.

**Note:** The options available will depend on the document from which options are accessed. Additional options are available if other modules are licensed in addition to the Web Client.

If viewing this topic online, click on a link below to navigate to the appropriate topic or right-click menu option. Otherwise, see the referenced items in the Index of this manual.

**Display Options**

- Overlay
- Scale
- Process
- Display
- Open in New Window

**Working with Documents**

- Reindex
- View Selected
- Clear Selected
- Print
- Delete
- Delete Page
- Delete from Envelope
- Add Note
- Remove from Folder
- Create List Report

**Toolbars | Viewer Control**

**Toolbars | Annotations**
Navigating Documents
Cross-References
Navigate
Find Folder
Show Folder Locations
Toolbars | Pages

Send/Export Options
Mail Document(s)
Send To
New Folder

Document Information
Properties
Keywords
Notes
VIEWING DOCUMENTS

Document Viewer

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.

- 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 79.
- From an open document, right click to receive a list of possible Document Options. See “Document Options and Right-Click Menus” on page 43.
- 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 98.
**Note:** Documents generated by external applications, such as Microsoft Word documents, and 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.

**Note:** Unity Forms cannot be displayed using the Document Viewer.
Document Retrieval

You can retrieve documents by using one or more of the following search criteria

- Document Type, Document Type Group, Document Handle
- Keyword Value and Date
- Note text or Document Text (for text-based documents)

These instructions describe the most common types of retrieval, all of which also include the ability to limit the search by Document Type or Document Type Group:

- See Document Retrieval by Keyword Value on page 47.
- See Document Retrieval by Document Handle on page 54.
- See Document Retrieval by Document Date on page 70.
- See Document Retrieval Using Note Search on page 66.

Document Retrieval by Keyword Value

Note: The options available to you will depend upon your User Groups and Rights and the configuration of the Document Types and Groups. See your system administrator for details.

1. Ensure that you are in the Document context.

   Click Document from the context drop-down select list.
2. Mode options can be accessed by clicking the mode drop-down select list.

3. Click **Document Retrieval**.

**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, upload, indexing, re-indexing, viewing/modifying Keyword Values, and scanning.
4. From the **Document Type Groups** drop-down select list, select the Document Type Group containing the types of documents you want to retrieve, or select **All** if you plan to retrieve documents from more than one Document Type Group.
5. From the **Document Types** list, select the Document Type(s) to be included in your search. To select multiple Document Types, use one of the following methods

- Press SHIFT or CTRL as you click.
- Double-click the list to select all documents.

The Keywords panel displays Keyword Types for the selected Document Type. If multiple Document Types are selected, the panel displays Keyword Types that are common to both.

**Note:** Some Document Type Groups do not require you to select a Document Type in retrieval. To determine whether a Document Type Group is 'group search enabled,' select that Document Type Group in the **Document Type Groups** drop-down select list. If the Document Type Group is 'group search enabled', the **Search** button becomes available as soon as the Document Type Group is selected.
6. To narrow your search further, you can do any one of the following:
   
a. You can search for documents by Keyword Value. From the available Keyword Type fields, type or select from the drop-down select list the desired Keyword Values. Pressing **F5** will open the drop-down select list for Keyword Values if one exists. If you begin to type a value, then press **F5**, the drop-down will begin with those values that match the keyed in value.

   Each Document Type is associated with one or more Keyword Types. All documents assigned to a Document Type have the same Keyword Types, and unique Keyword Values. If multiple Document Types are selected, the only applicable Keyword Types are those that are common to all the selected Document Types.

   
b. You can search for documents by date or date range using the **From Date** and **To Date** fields. See Document Retrieval by Document Date on page 70 for details.

d. You can search for documents by Note Types and note text in the **Note** tab. See Document Retrieval Using Note Search on page 66 for details.

**Note**: Some searches require you to enter at least one Keyword Value. Search requirements are determined by your system administrator.

**Note**: If you enter only a **From Date**, all documents from that date forward are retrieved. If you enter only a **To Date**, all documents up to that date are retrieved. If you enter a from and a to date, all documents within the date range are retrieved.

7. When you have entered all search criteria, click the **Search** button.
8. All documents that match the search criteria are displayed in a Document Retrieval list. If you used a text search as a method of retrieval, OnBase provides the number of times the search criteria appears in the document, as well as the page(s) on which the items were found.


b. Open a document by double-clicking its listing, or clicking the page number for text-based searches. The document is displayed in the Document Viewer.


10. To open multiple documents, elect to open subsequent documents in a new window. See Open in New Window on page 78 for details.

Note: During a given session, OnBase maintains a record of the search criteria used in each search in Query History, so that you can repeat it exactly.
Document Retrieval by Document Handle

If you have sufficient privileges, you can retrieve documents by their Document Handles, which are unique numbers assigned to each document.

You can access documents through the Document Handle by using the Document Retrieval mode or the Retrieval by Document Handle mode:

1. To retrieve documents through Document Retrieval mode, follow these steps:
   a. Select Document from the context drop-down select list.
   b. Select Document Retrieval from the mode drop-down select list.

![Document Retrieval](image)

   c. Click the Search by Document Handle button from the bottom of the Document Retrieval pane.
      The Retrieve by Document Handle dialog box is displayed.

![Retrieve by Document Handle](image)

d. Enter numeric search criteria and click Search.
You can enter a range of numbers in the **From Date** and **To Date** fields to retrieve all documents within that range, or enter a single number in either field to retrieve the document assigned that Document Handle.

OnBase retrieves all documents that you have rights to view and that meet your search criteria. These results include documents that have been deleted, but not purged.

2. To retrieve documents through the **Retrieval by Document Handle** mode, follow these steps:

   a. Select **Document** from the context drop-down select list.

   ![Document Context Drop-Down List]

   b. Select **Retrieve by Document Handle** from the mode drop-down select list.

   ![Retrieve Documents Numbered Dialog Box]

   The **Retrieve Documents Numbered** dialog box is displayed.

   c. Enter numeric search criteria and click **Search**.

   You can enter a range of numbers in the **From Date** and **To Date** fields to retrieve all documents within that range, or enter a single number in either field to retrieve the document assigned that Document Handle.

   OnBase retrieves all documents that you have rights to view and that meet your search criteria. These results include documents that have been deleted, but not purged.
Document Search Results List

The Document Search Results list is a list of all documents that meet the search criteria in any of the following searches or contexts:

- Document Type
- Document Date
- Keyword Value
- Note
- Folder
- Envelope
- Custom Query

Each item in a Document Search Results list identifies the Auto-Name assigned to the document. How documents are named varies between Document Types. The following example illustrates the appearance of a Document Search Results list.

You can change the height of the Document Search Results list by clicking and dragging the gray bar at the bottom of the Document Search Results list. If your system is configured to save the Document Search Results list height, the new height of the Document Search Results list will be saved as the default and will automatically open to that height the next time you execute a Document Search.

Viewing Documents

Open a document by double-clicking its name or, for text-based searches, by clicking the page number. The document is displayed in the Document Viewer.

You can also select multiple documents from this list and right-click to access options.
Note: If you have multiple documents selected, but do not have consistent privileges for the corresponding Document Types, only the options you can apply to all selected documents are available. The unavailable options are grayed out.

Previewing Documents in the Thumbnail Viewer

The thumbnail viewer lets you quickly preview multiple text or image documents in the Document Search Results list by displaying thumbnails of the first page of each document. You can zoom in on these thumbnails by resting your pointer on them. When you find the document you want, you can open the document by clicking its thumbnail.

Note: The thumbnail viewer may not be available, depending on your system’s setup.

1. From the Document Search Results list, select the documents that you want to preview. You can CTRL-click to select multiple individual documents, or you can SHIFT-click to select a range of documents between the first and last document you click.
2. Right-click within the list and select **View Thumbnails**. The thumbnail viewer displays the thumbnails and Auto-Names of the selected documents.

![Thumbnail Viewer](image)

**Note:** If **No Image Available** is displayed instead of a thumbnail, then the document’s file format does not allow it to be represented as an image. The thumbnail viewer cannot display thumbnails of OLE documents.

3. Rest your pointer on the thumbnail of a document to preview the first page. The preview magnifies the thumbnail to give you a better idea of the document’s content. Previews may be unavailable, depending on your system’s setup.

4. To open a document, click its thumbnail. The document is opened in a new window.
**CHANGING THUMBNAIL VIEWER OPTIONS**

If the thumbnail viewer allows customization, you can easily configure it according to your preferences. The thumbnail viewer lets you change the thumbnail size, the preview size (if applicable), and the number of columns displayed.

1. From the thumbnail viewer, click the **Options** button.

![Options dialog box](image)

The **Options** dialog box displays the viewer options and their current values.

![Options dialog box with values](image)

**Note:** If the **Options** button is unavailable, then custom options have been disabled. If you are having trouble previewing documents and the **Options** button is unavailable, ask your system administrator to adjust the viewer’s display settings.
2. Adjust the values as needed. Options are described in the following table:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Maximum Thumbnail Width</strong></td>
<td>In pixels, type the maximum width for thumbnails. For example, if you type 50, thumbnails will never be wider than 50 pixels. Valid values range from 20 through 500.</td>
</tr>
<tr>
<td><strong>Note:</strong></td>
<td>This setting is not used by documents that have thumbnail image renditions available. For faster loading, the thumbnail viewer displays these renditions without resizing them. Thumbnail image renditions are created by Document Import Processes and scan queues that have the Create Image Thumbnails On Commit option enabled.</td>
</tr>
<tr>
<td><strong>Maximum Thumbnail Height</strong></td>
<td>In pixels, type the maximum height for thumbnails. For example, if you type 50, thumbnails will never be taller than 50 pixels. Valid values range from 20 through 500.</td>
</tr>
<tr>
<td><strong>Note:</strong></td>
<td>This setting is not used by documents that have thumbnail image renditions available. For faster loading, the thumbnail viewer displays these renditions without resizing them. Thumbnail image renditions are created by Document Import Processes and scan queues that have the Create Image Thumbnails On Commit option enabled.</td>
</tr>
<tr>
<td><strong>Maximum Preview Width</strong></td>
<td>In pixels, type the maximum width for previews, which are displayed when you rest your pointer on thumbnails. For example, if you type 400, previews will never be wider than 400 pixels. This value must be at least twice as large as the maximum thumbnail width. Valid values range from 100 through 1000.</td>
</tr>
<tr>
<td><strong>Note:</strong></td>
<td>This option may be unavailable if your system administrator has turned off previews.</td>
</tr>
</tbody>
</table>

©2011 Hyland Software, Inc.
3. Click **Save & Close** to save your changes and close the dialog box. If you do not want to save your changes, just click **Close**.
Document Retrieval Using External Text Search

If you have sufficient privileges, you can search for specific text in a text-based document assigned to a Document Type or Document Type Group.

**Note:** External Text Search is not available for PCL documents in the OnBase Web Client or Desktop.

1. Ensure that you are in the Document context.
   
   Click **Document** from the context drop-down select list.

2. Mode options can be accessed by clicking the mode drop-down select list.

3. Click **Document Retrieval** from the mode drop-down select list.

4. From the **Document Type Groups** drop-down select list, select the Document Type Group containing the type(s) of document you want to retrieve, or select **All** if you plan to retrieve documents from more than one Document Type Group.
5. From the **Document Types** list, select the Document Type(s) to be included in your search. To select multiple Document Types, use one of the following methods:
   - Press SHIFT or CTRL as you click.
   - Double-click the list to select all documents.

6. Click the **Text** tab in the panel. The external text search options are displayed.

7. In the **Search String** field, type the text string you want to search for. The string must contain at least two characters, and at least one character in the string must be a letter or a number.

8. Select a search type:
   - **Text** - Searches for alphanumeric text.
   - **Number** - Searches for numeric values and allows the use of 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, type **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.
• **Formatted Number** - Searches for numeric values that use formatting characters. For example, to search for all Social Security Numbers greater than 800-00-0000, type > 800-00-0000 in the **Search String** field. You can use this option with following operators to limit your search: =, >, <, =>, and <=. The **and**, **or**, and **to** operators can be used to search for a range of values. For example, type 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.

9. Select one of the following options if necessary:
   
   - Select the **Case Sensitive** check box to return only matches that have the same capitalization as the text string search criteria.
   
   - Select the **Whole Word Match** check box to match only a text string that is the exact word (not just merely characters matching the search criteria). If there are any spaces within the text string, the **Whole Word Match** check box will be unavailable.
   
   - Select the **Wild Card Search** check box to include wild card characters in your text string search criteria.

**Note:** These options are not available for Number and Formatted Number search types.

10. To generate a report of the text search criteria and results, select the **Create Report** check box. Type the name of the report in the **Report Description** field.

11. Click the **Search** button in the toolbar.

   OnBase displays a Document Search Results list, which provides a link to each page that contains the text string, as well as the number of instances, or hits, per document.

12. Click a page number to display that hit in the Document Viewer. To display the hit in a new window, right-click the page number and select **Open in New Window**.
Note: If the selected document is displayed using an image rendition, the hits will not be highlighted on the document. The hits will only be highlighted when the selected document is displayed using a text rendition.
Document Retrieval Using Note Search

The OnBase Web Client lets you search documents for notes. You can limit your search by Document Type, Keyword Value, Note Type, note text, note creation date, and the note creator.

1. Ensure that you are in the Document context.
   
   Click **Document** from the context drop-down select list.

2. Mode options can be accessed by clicking the mode drop-down select list.

3. Click **Document Retrieval** from the mode drop-down select list.

4. From the **Document Type Groups** drop-down select list, select the Document Type Group containing the type(s) of document(s) you want to retrieve, or select **All** if you plan to retrieve documents from more than one Document Type Group.
5. From the **Document Types** list, select the Document Type(s) to be included in your search. To select multiple Document Types, use one of the following methods:
   - Press SHIFT or CTRL as you click.
   - Double-click the list to select all documents.

6. In the Keyword Type fields provided, type any Keyword Values by which you want to limit your search. You can also use the date fields above the **Keywords** tab to limit your search by Document Date.

7. Click the **Note** tab of the navigation panel.
8. Enter your search parameters into the appropriate fields, which are described in the following table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search String</td>
<td>Type the note text to search for.</td>
</tr>
<tr>
<td>From Date / To Date</td>
<td>Enter a date range to limit your search to notes created within that range. You can use the corresponding calendars to select a date. If no range is specified, OnBase searches for notes created on any date within the selected Document Type(s).</td>
</tr>
<tr>
<td>Note Owner</td>
<td>Select the OnBase user who created the note you are searching for. If no user is specified, OnBase searches for notes created by any user within the selected Document Type(s).</td>
</tr>
<tr>
<td>Note Types</td>
<td>Select the Note Type you are searching for. If no Note Type is specified, OnBase searches for notes of any type within the selected Document Type(s).</td>
</tr>
</tbody>
</table>

9. Click the **Search** button. When the search is finished, OnBase displays all matching documents in a Document Search Results list. Navigate through multiple pages of results using the list’s toolbar buttons.

To adjust the Document Search Results settings, use the **Options** toolbar button. See Document Search Results Options on page 29 for details.

- To open multiple documents at the same time, open subsequent documents in a new window. See Open in New Window on page 78 for details.
**Document Retrieval by Document Date**

When retrieving documents, you can limit your search to documents with a specific Document Date or within a certain date range. You can limit results by date when performing standard searches by Keyword Value, external text searches, and note searches. The Document Date is assigned to all documents upon import.

**Note:** See Document Retrieval by Keyword Value on page 47 and the Document Properties topic, which provides clarification on Document Date vs. Date Stored.

1. Specify the appropriate date(s) in the **From** and/or **To** fields.

2. You can also specify a date or date range by clicking the ![Calendar Icon](image) in the upper right of the date specification area to display available options:

   ![Calendar Options](image)

3. Select an item from either list. The **To Date** and **From Date** fields automatically populate according to your selection.

**Note:** Your system administrator has the ability to eliminate the month selection bar from the calendars. So it is possible that it may not be included in the calendars you see.

**Note:** The character used to separate the parts of the date should be appropriate to your locale; OnBase recognizes slashes (/), commas (,), and periods (.) as date separators.
**Tip:** If you often find yourself using the same Document Date or date range, you can provide defaults for the **From Date** and **To Date** fields. See “Changing the Retrieval Default Date” on page 20.

### Date Range Parameters and Corresponding Results

<table>
<thead>
<tr>
<th>Date Range Parameters</th>
<th>Result</th>
</tr>
</thead>
</table>
| **From Date:** left blank  
**To Date:** left blank  | Retrieves all documents with document dates from 1/1/1753 through the current date. |
| **From Date:** left blank  
**To Date:** valid date  | Retrieves all documents with document dates from 1/1/1753 through the date in the To field. |
| **From Date:** valid date  
**To Date:** left blank  | Retrieves all documents with document dates from the date in the **From Date** field through the current date. |
| **From Date:** valid date \( < \) **To Date:** valid date  | Retrieves all documents with document dates from the date in the **From Date** field through the date in the **To Date** field. Note that a valid date can be any date from 1/1/1753 to any date in the future. The only stipulation is that the **From Date** date cannot be greater than the **To Date** date. |
| **From Date** valid date \( = \) **To Date** valid date  | Retrieves all documents with the specified document date. |
Keyword Types Relationship Examples in Document Retrieval

**Cascading Data Set**

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

![Keywords Table](image)

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

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

A Document Type contains a Multi-Instance Keyword Type Group that includes the Keyword Types **First Name** and **Last Name**.

If you were to search for First Name *John* and Last Name *Adams*, a document retrieval would only bring up the documents that contained the record of *John Adams*. It would not bring up documents that simply contained the First Name *John* and Last Name *Adams* on the same document. They would have to be in the same record.

For example, the following documents contained the same Keyword Values.

- Document A was configured with a Multi-Instance Keyword Type Group, and was indexed with two records.
- Document B was configured with individual Keyword Types and was indexed with multiple values for **First Name** and **Last Name**.

A document retrieval for John Adams would not find Document A. It would find Document B.
**Search Button**

When using any Document Retrieval method to locate a document (Retrieve a document using Keyword Values, note text, document text, or Custom Queries) or when searching for a folder, the Search Button initiates the search using the criteria you have entered.
Clear All Button

Available from many Document Retrieval functions. Any time you decide to change your search criteria, you can clear all search criteria by clicking the Clear All button.
Clear Keywords Button

Available from many Document Retrieval functions using Keyword Values as search criteria. Any time you decide to change your search criteria, you can empty all the Keyword Type fields by clicking the *Clear Keywords* button.
Showing or Hiding the Document Retrieval List

If you want to enlarge the document display area, you can minimize the Documents list by clicking the \( \text{\textbullet} \) in the top right corner. The minimized Document Retrieval list looks like this:

You can restore the list to its original appearance by clicking the \( \text{\textbullet} \) in the top right corner.
Open in New Window

You can view multiple documents at the same time using the **Open in New Window** right-click option.

1. While viewing a document, select another document from the retrieval list and right-click.
2. Select **Open in New Window**. This opens the new document in a separate window, while the old document remains in the original window.

**Note:** You cannot view documents retrieved from a text-based search in multiple windows, they must be viewed one at a time.
TOOLBARS IN THE WEB CLIENT

There are several different toolbars available in the Web Client. Toolbar buttons are designed to make navigation and document management an easy, point-and-click operation.

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.

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.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overlay</td>
<td><strong>Overlay</strong> applies an overlay to the document, if an overlay is present.</td>
</tr>
<tr>
<td>Save to File</td>
<td><strong>Save to File</strong> displays the <strong>Save to File</strong> dialog box, allowing you to save documents outside of OnBase if you have appropriate user rights.</td>
</tr>
<tr>
<td>Print</td>
<td><strong>Print</strong> displays the <strong>Print</strong> dialog box, if you have user rights to print the document.</td>
</tr>
<tr>
<td>Add Note</td>
<td><strong>Add Note</strong> displays the <strong>Add Note</strong> dialog box, which displays note types you can add to the document.</td>
</tr>
<tr>
<td>View Note</td>
<td><strong>View Note</strong> displays the <strong>View Note</strong> dialog box, which displays a list of all notes on the document.</td>
</tr>
<tr>
<td>First Page</td>
<td><strong>First Page</strong> displays the first page of the document.</td>
</tr>
<tr>
<td>Previous Page</td>
<td><strong>Previous Page</strong> displays the preceding page of a multi-page document.</td>
</tr>
<tr>
<td>Next Page</td>
<td><strong>Next Page</strong> displays the following page of a multi-page document.</td>
</tr>
<tr>
<td>Button</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>[Image]</td>
<td><strong>Last Page</strong> displays the last page of the document.</td>
</tr>
<tr>
<td>[Image]</td>
<td>Enter a page number in the <strong>Go To Page</strong> field to jump directly to a specific page.</td>
</tr>
<tr>
<td>[Image]</td>
<td><strong>Zoom In</strong> magnifies the view of a document, reducing the portion that is visible. Every zoom increases magnification by one third.</td>
</tr>
<tr>
<td>[Image]</td>
<td><strong>Zoom Out</strong> reduces the magnification of a document, increasing the portion that is visible. Every zoom reduces magnification by one quarter.</td>
</tr>
<tr>
<td>[Image]</td>
<td><strong>Sizing</strong> 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</td>
</tr>
<tr>
<td>[Image]</td>
<td><strong>Actual Size</strong> displays the document in its actual size (as it is stored in OnBase). Clicking this button sets the magnification to 100%.</td>
</tr>
<tr>
<td>[Image]</td>
<td><strong>Fit Width</strong> resizes the document page so that its width is the same as the width of the document display area.</td>
</tr>
<tr>
<td>[Image]</td>
<td><strong>Fit Window</strong> resizes the document page so that its height is the same as the height of the document display area.</td>
</tr>
<tr>
<td>[Image]</td>
<td><strong>Rotate Left</strong> rotates the document 90 degrees counterclockwise.</td>
</tr>
<tr>
<td>[Image]</td>
<td><strong>Rotate Right</strong> rotates the document 90 degrees clockwise.</td>
</tr>
<tr>
<td>[Image]</td>
<td><strong>Options</strong> enables you to set viewer options.</td>
</tr>
<tr>
<td>[Image]</td>
<td><strong>Scale to Gray</strong> softens the contrast of text and image documents at zoom levels of less than 100%. This feature is most noticeable on black-</td>
</tr>
<tr>
<td>[Image]</td>
<td><strong>Show Alternate Rendition</strong> is available only for documents that are allowed to have multiple renditions. This button allows you to view a</td>
</tr>
</tbody>
</table>
Notes Toolbar

The Notes toolbar is a row of tabs representing notes and annotations on the current page. By default, the toolbar is displayed along the bottom of the Document Viewer.

Click a note tab to read the note or annotation.

Note: If you don't see any Note tabs, but there are notes on the document, ensure the Notes toolbar is visible.

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.
Document Results Toolbar

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Next Results" /></td>
<td><strong>Next Results</strong> 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).</td>
</tr>
<tr>
<td><img src="image" alt="Previous Results" /></td>
<td><strong>Previous Results</strong> 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).</td>
</tr>
<tr>
<td><img src="image" alt="Options" /></td>
<td><strong>Options</strong> lets you modify Document Search Results list options.</td>
</tr>
</tbody>
</table>

Internal Text Search Toolbar

From an open text-based document, use the Internal Text Search toolbar to search for specific text strings within the document.

- You can limit the text string search to one or more consecutive columns (character positions).
- 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.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Text Search Options" /></td>
<td><strong>Text Search Options</strong> let you limit 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 from the current page. For more information, see Limiting Searches Using Text Search Options on page 84.</td>
</tr>
<tr>
<td><img src="image" alt="Find Next" /></td>
<td><strong>Find Next</strong> searches for the next following occurrence of the specified string within the current text document.</td>
</tr>
</tbody>
</table>
Performing an Internal Text Search

1. Click in the **Search String** field and type the characters to search for.
   
   Any previously-entered search strings from your current Web session are retained in the drop-down select list located on the Internal Text Search toolbar. You can select a previous string from this list to quickly search the current document for that string.

   If you close the document and re-open it, only the last 25 searches will appear in the drop-down select list.

2. Click **Find Next** to locate the first occurrence of the text.

   **Note:** You can also press **Enter** to initiate the search or to find subsequent occurrences of the text.

3. Click **Find Previous** or press **Shift+Enter** on the keyboard to return to the previous search occurrence.

   Any occurrences found in the document will display within a highlight bar. The actual search string will display 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. If you have an idea of where the text string occurs in the document, 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. Depending on how the document was imported, you may also be able to search predefined blocks of text using column indexes. To perform a search using Text Search Options, follow these steps:

1. Click the Text Search Options button on the Text Search toolbar. The Text Search dialog box is displayed.
2. Select any desired options. See the table below for more details on each option.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search String</td>
<td>Enter your search term in this field.</td>
</tr>
<tr>
<td>Search type</td>
<td><strong>Text</strong> - select this option to search for alphanumeric text. <strong>Number</strong> - select this option to search for numeric values. This option also allows the use of the following operators to limit the search: =, ≥, ≤, and ≥=. You can use <strong>and</strong>, <strong>or</strong>, and <strong>to</strong> as operators to search for a range of values. For example, type <strong>2008 and 2009</strong> to find documents containing both 2008 and 2009. <strong>Caution:</strong> 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 <strong>001</strong> and the actual text is <strong>ABC001</strong>, then the value will not be found. <strong>Formatted Number</strong> - select this option to search for numeric values that use formatting characters. For example, to search for all Social Security Numbers greater than 800-00-0000, type <strong>&gt; 800-00-0000</strong> in the <strong>Search String</strong> field. You can use this option with following operators to limit your search: =, ≥, ≤, ≥=. The <strong>and</strong>, <strong>or</strong>, and <strong>to</strong> operators can be used to search for a range of values. For example, type <strong>800-00-000 to 900-00-0000</strong> to find documents containing values within this range. <strong>Note:</strong> 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.</td>
</tr>
<tr>
<td>Wild Card Search</td>
<td>Select the <strong>Wild Card Search</strong> check box to include wild card characters in your text string search criteria.</td>
</tr>
<tr>
<td>Case Sensitive</td>
<td>Select the <strong>Case Sensitive</strong> check box to return only matches that have the same capitalization as the text string search criteria.</td>
</tr>
</tbody>
</table>
3. Click **Find**. The search will be executed with your selected options. You can also click **Exit** and run the search from the Internal Text Search toolbar. The selected settings remain applied to all internal text string searches for the document displayed, until the settings are changed or disabled, or until the Document Viewer is closed.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Whole Word Match</td>
<td>Select the <strong>Whole Word Match</strong> check box to match only a text string that is the exact word (not just merely characters matching the search criteria). If there are any spaces within the text string, the <strong>Whole Word Match</strong> check box will be unavailable.</td>
</tr>
<tr>
<td>Start Search on Current Page</td>
<td>Select <strong>Start Search on Current Page</strong> to begin the search from the current page. If this option is applied and you search using only the <strong>Find Previous</strong> button, the pages that follow the current page are omitted from the search. If you search using only the <strong>Find Next</strong> button, the pages that precede the current page are omitted from the search. Clear this option if you want the search to begin on the first page of the document.</td>
</tr>
<tr>
<td>Column Search</td>
<td><strong>Column Search</strong> - select this check box to search within specified columns. <strong>Column Index</strong> - select the column index for the block of text that you want to search from the <strong>Column Index</strong> drop-down select list. The <strong>Column Index</strong> drop-down select list is unavailable if the document has no column indexes. <strong>From</strong> - type the character position of the column to start the search in (the left most 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. <strong>To</strong> - type the character position of the column to end the search in (the right most column to be searched). The number in the <strong>To</strong> field must be greater than or equal to the number in the <strong>From</strong> field. <strong>Note:</strong> Column Index text search or text search using Full-Text Indexing Server for Verity or Full-Text Indexing Server for Microsoft is recommended for business requirements that include searching large documents, in order to realize optimal performance.</td>
</tr>
</tbody>
</table>
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 222.

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

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Black Redaction" /></td>
<td><strong>Toggle Redaction</strong> 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 select list. You remain in redaction creation mode until you click the <strong>Toggle Redaction</strong> button again. This option is available for image documents only. You must have sufficient privileges to modify the document.</td>
</tr>
</tbody>
</table>
| ![Annotation Highlight](image) | **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. |
| ![Annotation Highlight](image) | **Toggle Annotation** enables you to add one or more annotations to the document by selecting the annotation(s) from the adjacent drop-down select 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.
Column/Row Locking Toolbar

The **Column/Row Locking** toolbar is available for text documents. 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.

<table>
<thead>
<tr>
<th><strong>Button</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Lock Columns" /></td>
<td><strong>Lock Columns</strong> 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.</td>
</tr>
<tr>
<td><img src="image" alt="Lock Rows" /></td>
<td><strong>Lock Rows</strong> 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.</td>
</tr>
</tbody>
</table>

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.

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.
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. When you open a document, thumbnails may be displayed in one of two positions by default:

- Along the right edge of the Document Viewer, in a vertical column
- Along the bottom edge of the Document Viewer, in a horizontal row
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 clicking on the thumbnail for that page.
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.
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.

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
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)
   - 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.
Search Button

When using any Document Retrieval method to locate a document (Retrieve a document using Keyword Values, note text, document text, or Custom Queries) or when searching for a folder, the **Search** Button initiates the search using the criteria you have entered.

Clear Keywords Button

Available from many Document Retrieval functions using Keyword Values as search criteria. Any time you decide to change your search criteria, you can empty all the Keyword Type fields by clicking the **Clear Keywords** button.

Clear All Button

Available from many Document Retrieval functions. Any time you decide to change your search criteria, you can clear all search criteria by clicking the **Clear All** button.
WORKING WITH DOCUMENTS

This chapter provides a general overview of working with documents.

When working with documents in OnBase, it is important to understand that documents may behave slightly differently, depending upon their file format. A file format identifies the type of electronic file.

The two most common file formats are Image documents and Text documents. Other file formats could include XML, video formats, or OLE documents such as those created with Microsoft Office applications. See your system administrator for specific questions regarding your system’s file types and their default behavior.

Image Documents

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

OLE Documents

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

When you open an OLE document in OnBase, the document is displayed in a viewer based on the document's source application. The document's right-click options are specific to the source application. OnBase options can be accessed by right-clicking the document in a Document Search Results list.

For open OLE documents, you can access OnBase options from the File and Document menus in the OnBase Client, the OLE/PDF Viewer Control toolbar in the OnBase Desktop, or the Document and Edit menus in the Web Client.

To modify, revise, re-index, add notes to, and find cross references for Office documents opened from the OnBase Web Client, use the Core Services Office Add-In, the Office Business Application for 2003, the Office Business Application for 2007, or the Office Business Application for 2010.
Text Documents

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

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

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

Document Viewer Shortcuts

The following keyboard shortcuts can be used when viewing documents:

Navigating Documents

<table>
<thead>
<tr>
<th>Shortcut</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page Up</td>
<td>Quickly scrolls up the current page.</td>
</tr>
<tr>
<td>Page Down</td>
<td>Quickly scrolls down the current page.</td>
</tr>
<tr>
<td>Up Arrow</td>
<td>Slowly scrolls position on the current page up.</td>
</tr>
<tr>
<td>Down Arrow</td>
<td>Slowly scrolls position on the current page down.</td>
</tr>
<tr>
<td>Right Arrow</td>
<td>Slowly scrolls position on the current page right.</td>
</tr>
<tr>
<td>Left Arrow</td>
<td>Slowly scrolls position on the current page left.</td>
</tr>
<tr>
<td>CTRL + Page Up</td>
<td>Navigates to the top of the previous page.</td>
</tr>
<tr>
<td>CTRL + Page Down</td>
<td>Navigates to the top of the next page.</td>
</tr>
</tbody>
</table>
Zooming In on / Out of Documents

<table>
<thead>
<tr>
<th>Shortcut</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>Navigates to the top of the current page.</td>
</tr>
<tr>
<td>End</td>
<td>Navigates to the bottom of the current page.</td>
</tr>
<tr>
<td>CTRL + Home</td>
<td>Navigates to the top of the first page.</td>
</tr>
<tr>
<td>CTRL + End</td>
<td>Navigates to the top of the last page.</td>
</tr>
<tr>
<td>CTRL + Up Arrow</td>
<td>Quickly scrolls up the current page.</td>
</tr>
<tr>
<td>CTRL + Down Arrow</td>
<td>Quickly scrolls down the current page.</td>
</tr>
<tr>
<td>CTRL + Right Arrow</td>
<td>Quickly scrolls position on the current page right.</td>
</tr>
<tr>
<td>CTRL + Left Arrow</td>
<td>Quickly scrolls position on the current page left.</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Shortcut</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter</td>
<td>Starts the search or finds the next instance of the text if the search is in progress.</td>
</tr>
<tr>
<td>Shift + Enter</td>
<td>Finds the previous instance of the text.</td>
</tr>
</tbody>
</table>

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

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

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

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

Access Document Properties

View the Document Properties by accessing the Document Information dialog box, which contains a variety of information regarding the document.

To view a document’s properties:

- From a Document Search Results list, select the document, right-click, and select Properties.
- From an open text or image document, right-click and select Properties.
- From an open OLE or PDF document, select Document | Properties.

Note: Your User Group must have the Document Properties privilege in order to access Document Properties. For additional information, see your system administrator.
Document Properties

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

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Handle</td>
<td>The document number assigned to the document when it was brought into the system. This is the only place in the system where the internal document handle for a document is displayed. The document handle can be used to retrieve a specific document and to troubleshoot problems with the document.</td>
</tr>
<tr>
<td>Document Name</td>
<td>The Auto-Name string of the document.</td>
</tr>
<tr>
<td>Batch Number</td>
<td>The number of the batch in which the document was brought into the system. A batch number is displayed if the document was brought into the system through a process such as COLD.</td>
</tr>
<tr>
<td>Document Date</td>
<td>The date used by the system to refer to the document. This date is used during searches limited by date. The document date is assigned to a document during import.</td>
</tr>
<tr>
<td>Archival Date</td>
<td>The date on which the document was imported into the system. If an invoice from December 28, 1996 was brought into the system on March 11, 1997, December 28, 1996 is the document date and March 11, 1997 is the date stored. This date is used for internal tracking. You cannot search for documents based on the date stored. This field also contains the time at which the document was imported into the system. You cannot search for documents based on the time stored.</td>
</tr>
<tr>
<td>Document Type Number</td>
<td>The internal number associated with documents of this Document Type.</td>
</tr>
<tr>
<td>Document Type Name</td>
<td>The name of the Document Type to which the document belongs.</td>
</tr>
<tr>
<td>Document Status</td>
<td>Displays the document's position in the system. If the document is retrievable, a status of 0 is displayed. If the document is in the system, but not yet available for retrieval, a status of 1 is displayed. If the document has been deleted, a status of 16 is displayed.</td>
</tr>
</tbody>
</table>
### Property | Description
--- | ---
**Document Type Revision** | Displays which revision of the Document Type the document is using. Different Document Type revisions can have different configurations.

**Revision** | If the document is revisable, the Revision field displays the latest revision number of the document. For non-revisable documents, this field is always set to 1.

**Created By** | The name of the user who processed the document into the system.

**Security Value** | For internal use only.

**Page** | The internal page number for a document. Page numbers start at 0, and are indicative of the number of files used to display the document. Text documents typically have only one page, while image documents typically have several. Virtual E-Forms have no pages, so on a Virtual E-Form this field would display the tag `<Virtual E-Form>` instead of a page number.

**Disk Group** | The number associated with the Disk Group in which the document is stored.

**Volume** | The volume number in the Disk Group in which the file is stored.

**# of Pages and # of Lines** | The characteristics of the document within the file. These values are useful for text documents. Non-text documents display the number of pages as 1 and the number of lines as 0.

**File Format** | The number associated with a configured file format. This number determines how a document is displayed and printed.

**Item Offset and Item Size** | Describes the physical storage of the document within the file. The Item Offset is the byte offset into the file for the starting point of this particular document. The Item Size is the number of bytes in the file that make up this document.
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.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Path</td>
<td>Lists a partial path to the document. The beginning of the path depends on the location configured for the document’s disk group.</td>
</tr>
</tbody>
</table>
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. The Select Cross Reference dialog box will be displayed:

Select the cross-reference you want to open and click OK.

**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.

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**

From an open PDF or OLE document, such as a Word document, select Document | Cross References.

**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.
Overlays

This example shows a document displayed with and without an overlay.

If a text document has been set up with a corresponding overlay, the Overlay button is available at the top of the viewing window. This indicates that you can apply the overlay to the document or remove the overlay.

**Apply an Overlay to a Document**

Open a text document that uses an overlay and select the Overlay button from the Client toolbar to apply its overlay.

**Remove an Overlay from a Document**

To remove the overlay from the window, click the Overlay button.
Renditions

Document Types may be configured to allow multiple renditions of a document. A rendition is a copy of an original document that is saved in a different file format. An example of a rendition is a searchable text document created from an image document.

Viewing Renditions

To view a rendition in the OnBase Web Client,

1. Access rendition information by doing one of the following:
   - From a document selected in a Document Search Results list, right-click and select Revisions / Renditions.
   - From an open text or image document, right-click in the viewer and select Revisions / Renditions.
   - From an open PDF or OLE document, such as a Word document, select Document | Revisions / Renditions.
   - From an open PDF, OLE, or image document, select the Revisions / Renditions icon.
     If the Revisions / Renditions option is unavailable, the Document Type may not allow multiple renditions.

2. From the Revisions / Renditions dialog box, double-click the rendition you want to view.

Note: When you print from an open document, the rendition that is currently displayed is printed.

Importing Renditions

For Document Types that allow renditions, you can import a document as a rendition of an existing document. This option is available if the existing document and the imported document have identical Document Types and Keyword Values, but different file formats. Depending on your system’s configuration, the imported and existing document may be required to have the same Keyword Values for some or all Keyword Types. You cannot import a document as a rendition if the existing document already has a rendition with the same file format as the imported document.

When you import a document meeting the above criteria, the Document Revisions dialog box is displayed. Select the existing document for which you want to create a rendition and click Save as Rendition. To save the imported document as new document, click Save as New Document, or click Cancel to cancel the import process.
**Note:** Additional options may be available if the Document Type is revisable. For more information about revisions, see the EDM Services Help files or reference manual.

**Send To Options**

From an open document or from the Document Search Results list, right-click and choose **Send To** to display a submenu 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** or **text/plain**.
- 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:

- **Send To | Clipboard**: Select to copy the document to the Windows clipboard.
- **Send To | Mail Recipient**: Select to e-mail 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 documentation 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.)
- Select Delete copied pages from original document to delete the specified pages from the current document. (This option is available for multi-page image documents only.)
- **Send To | File:** Select to save the document to a specified file.
- **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.

**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:

- **Send To | Mail Recipient:** Select to e-mail the document externally to a specified recipient.
- **Send To | File:** Select to save the document to a specified file.
- **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 documentation 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.)
- Select **Delete copied pages from original document** to delete the specified pages from the current 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. See Send To Envelope - Adding Documents to an Envelope on page 205.
- **Send To | Folder**: Select to add the selected document(s) to a static folder. See Adding Documents to Static Folders on page 174.

### Saving Documents to Files

If you have sufficient privileges, you can save all or part of the document that you are viewing as a disk file that you can access on your computer system or through a network connection. Text and image documents can be saved using the viewer control toolbar or the Document Search Results list. OLE and PDF documents can be saved using the Document Search Results list. If the OLE or PDF document opens in its native application (such as Microsoft Word), then you may be able to save the document externally by selecting **File | Save As** from the application.

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

1. From the Document Search Results list, select the document(s) that you want to save, right-click, and select **Send To | File**.

   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 won’t be saved to the file.
2. Select a **Content Type** from the **Save to File** dialog box.

**Caution:** If you select a **Content Type** of **Native Format** for a multi-page document, only the first page will be saved. If you want to save more than one page, you must select a different **Content Type**.

**Caution:** You should always save very large documents (i.e., documents over 10 MB) with a **Content Type** of **Native Format**. If you choose any other Content Type, it can take more than 20 minutes to save the file.

Even when you use Native Format, it may take a long time to save very large documents. For example, it can take up to 10 minutes to save a 60 MB text file using Native Format.

**Note:** Documents that cannot be converted to the selected content type are saved in their native format.
3. Click the **Advanced** button for advanced options.

   - If you selected a **Content Type** of **text/plain**, the following options are displayed:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Space Conversion</td>
<td>Select <strong>Convert Spaces to TAB</strong> if you wish to convert spaces on a text file to a tab-delimited format. The default number of spaces to convert to a tab is <strong>2</strong>. Select <strong>No Conversion</strong> to leave spaces as they appear on the text file.</td>
</tr>
<tr>
<td>Form Feed Conversion</td>
<td>Select <strong>Convert Form Feeds to a new line (CR/LF)</strong> to convert any form feeds in the document to text. Select <strong>Preserve Form Feeds</strong> to save all form feeds in the document.</td>
</tr>
</tbody>
</table>

   - If you selected a **Content Type** of **application/pdf** or **image/tiff**, the following options are displayed:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annotation and/or Note Icon On Document</td>
<td>The document is saved 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. <strong>Note:</strong> When printed, annotations and icons are the same size as they appear on the document when it is scaled to 100%. <strong>Note:</strong> This option does not function when saving PDF documents.</td>
</tr>
</tbody>
</table>
   | Note Text On Document   | **Note:** The document is saved 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. This option does not function when saving PDF documents.
4. Select the document page(s) you want to save.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>Saves all pages. This is the only available option for documents saved using the Send To</td>
</tr>
<tr>
<td>Current Page</td>
<td>Saves only the current page.</td>
</tr>
<tr>
<td>Pages</td>
<td>Saves a range of pages. Page ranges can be entered as a compound selection such as 1-5, 12, 22, 31-100, 200. Selecting a page range in the image/tiff format results in a multi-page TIFF file.</td>
</tr>
</tbody>
</table>

**Note:** When saving files with an extension of .GIF, .JPG, and .PNG in their native format, the only valid selection is **Current Page** or a single page specified in the **Pages** field.

5. Click **OK**. The **Save As** dialog box is displayed.

6. Modify the file’s name and location as needed.

- The default **File Name** is 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 string may be truncated to keep the file name at or below 255 characters.

It is a Microsoft limitation that the full path to a file is limited to a maximum of 260 characters. For more details, see [http://msdn.microsoft.com/en-us/library/aa365247%28VS.85%29.aspx](http://msdn.microsoft.com/en-us/library/aa365247%28VS.85%29.aspx).

- If you keep the default name and then try to save it in the same location, OnBase will automatically append the name with an underscore and an incremental number. For example, if **Checking Statement Acct#1020** already exists in the location you are saving to, OnBase will name the next file **Checking Statement Acct#1020_1.tif**. This appended name will still be the default even if you elect to change locations.

**Note:** If your default name is an appended version, for example **Checking Statement Acct#1020_1.tif**, and you then change the directory to a location where **Checking Statement Acct#1020_1.tif** already exists, you will get a warning **This file already exists with this name. Overwrite?**.
7. Click **Save** to save the file. If you selected multiple documents, the **Save As** dialog box is displayed for the next document.

Certain characters will be substituted in the file name upon saving.

**Character Substitutions**

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

- \ and / are substituted with -
- : is substituted with ;
- * is substituted with +
- ? is substituted with !
- < is substituted with [
- > is substituted with ]
- " is substituted with '
- | is substituted with !

**Content Type**

When saving or mailing documents, you may have the option to specify the **Content Type**. The default content type selected depends on the document's file format and its overlay settings.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt;&gt;Native Format</td>
<td>Saves or sends the document in the format in which it is stored in OnBase.</td>
</tr>
<tr>
<td></td>
<td>Overlays are not applied.</td>
</tr>
<tr>
<td>application/pdf</td>
<td>Saves or sends the document as a PDF file.</td>
</tr>
<tr>
<td></td>
<td>Available for documents with any of the following file formats:</td>
</tr>
<tr>
<td></td>
<td>- Image file format</td>
</tr>
<tr>
<td></td>
<td>- PCL</td>
</tr>
<tr>
<td></td>
<td>- PCL with overlay</td>
</tr>
<tr>
<td></td>
<td>- Text report format</td>
</tr>
<tr>
<td></td>
<td>- Text report format with overlay</td>
</tr>
</tbody>
</table>
### Option/Description Table

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>image/tiff</td>
<td>Saves or sends the document as a TIFF file.</td>
</tr>
<tr>
<td></td>
<td>Available for documents with any of the following file formats:</td>
</tr>
<tr>
<td></td>
<td>• Image file format</td>
</tr>
<tr>
<td></td>
<td>• PCL</td>
</tr>
<tr>
<td></td>
<td>• PCL with overlay</td>
</tr>
<tr>
<td></td>
<td>• Text report format</td>
</tr>
<tr>
<td></td>
<td>• Text report format with overlay</td>
</tr>
<tr>
<td>text/plain</td>
<td>Saves or sends the document in its native .txt format.</td>
</tr>
<tr>
<td></td>
<td>Available for documents with a text report format.</td>
</tr>
<tr>
<td></td>
<td>Overlays are not applied.</td>
</tr>
</tbody>
</table>

### Notes on the Text/Plain Content Type

If you selected **text/plain** as the **Content Type**, you can export page data in a tab-delimited format instead of the default format, which retains all spaces within the text. This example shows tab-delimited text data pasted into a spreadsheet.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ACCOUNT OWNER: JOHN ADAMS</td>
</tr>
<tr>
<td></td>
<td>GET A HOME IMPROVEMENT LOAN TODAY AND BUILD FOR THE FUTURE!</td>
</tr>
<tr>
<td></td>
<td>GET FREE CHECKING SERVICES WITH A $1000 MINIMUM BALANCE</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>--------------------------------- ---------------------------------</td>
</tr>
<tr>
<td></td>
<td>CREDIT BACK BALANCE 150,843.74  LAST STATEMENT 01/20 12,156.60</td>
</tr>
<tr>
<td></td>
<td>MINIMUM BALANCE 10,449.60  4 CREDITS 12,739.97</td>
</tr>
<tr>
<td></td>
<td>AVG AVAILABLE BALANCE 10,490.35  6 DEBITS 2,699.06</td>
</tr>
<tr>
<td></td>
<td>AVERAGE BALANCE 10,490.35  THIS STATEMENT 02/20 22,197.61</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>DATE...AMOUNT DATE...AMOUNT DATE...AMOUNT</td>
</tr>
<tr>
<td></td>
<td>2-Feb 12 35 15-Feb 12,356.00</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>DESCRIPTION OTHER CREDITS</td>
</tr>
<tr>
<td></td>
<td>13-Feb 5.73</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>CHECK # CHECKS AMOUNT DATE AMOUNT</td>
</tr>
<tr>
<td></td>
<td>CHECK # 146 25 57 2/9/1997 24,670.60</td>
</tr>
<tr>
<td></td>
<td>CHECK # 147 1470.62 2/9/1997 23,392.00</td>
</tr>
<tr>
<td></td>
<td>CHECK # 148 363.52 2/11/1997 23,022.06</td>
</tr>
<tr>
<td></td>
<td>CHECK # 149 389.85 2/14/1997 22,662.61</td>
</tr>
<tr>
<td></td>
<td>CHECK # 150 452.63 2/20/1997 22,109.98</td>
</tr>
</tbody>
</table>

©2011 Hyland Software, Inc.
Click the **Advanced** button to display the **Advanced Options** dialog box:

![Advanced Options dialog box](image)

To convert spaces to a TAB, select the **Convert Spaces to a TAB** radio button. By default, 2 is specified as the minimum number of spaces for conversion. Edit the default number if desired and click **OK**.

If you are working in a text file that has form feeds, and wish to convert the form feeds to text, select the **Convert Form Feeds to a new line (CR/LF)** radio button. This button is selected by default. To preserve form feeds, select the **Preserve Form Feeds** radio button. The resulting file will have form feeds at the end of each page.

**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.

*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:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clipboard</td>
<td>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.</td>
</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 Archive Documents dialog box is displayed. Index the new document by specifying the Document Type Group, Document Type, Document Date, and any Keyword Values.</td>
</tr>
<tr>
<td></td>
<td>• Click OK to create the new document.</td>
</tr>
<tr>
<td></td>
<td>• Click Clear to remove the currently displayed values.</td>
</tr>
<tr>
<td></td>
<td>• Click Cancel to exit without creating a new document.</td>
</tr>
</tbody>
</table>
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.

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

2. Select a Content Type.
3. Click OK.
Send To | Create New Document - Creating New Documents from Existing Documents

If you have sufficient user rights, you can create new documents from existing text and image documents stored in OnBase.

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 Archive Documents dialog box is displayed.

2. In the Page Range field, type the pages or page range you want to include in the new document. You can type complex ranges, such as 1-2,5,8-11. The page range option is available for multi-page image documents only.

**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. Clear the Delete copied pages from original document option if you want to retain the copied pages in the original document. Select this option to remove the copied pages from the original document. This option is available for multi-page image documents only.
4. Index the new document by specifying the Document Type Group, Document Type, Document Date, and any Keyword Values.

**Note:** 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.

5. Depending on your system’s configuration and licensing, the *Add To Workflow* check box may be available. Select it to add this new document to a workflow. This check box is only available when licensed for Workflow and the Document Type is part of an existing life cycle.

6. 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 *Archive Documents* dialog box.

**Column/Row Locking Toolbar**

The *Column/Row Locking* toolbar is available for text documents. 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.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Lock Columns" /></td>
<td><strong>Lock Columns</strong> 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.</td>
</tr>
<tr>
<td><img src="image" alt="Lock Rows" /></td>
<td><strong>Lock Rows</strong> 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.</td>
</tr>
</tbody>
</table>

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.
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. When you open a document, thumbnails may be displayed in one of two positions by default:

- Along the right edge of the Document Viewer, in a vertical column
- Along the bottom edge of the Document Viewer, in a horizontal row
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 clicking on the thumbnail for that page.
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.
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.

Considerations for Adding Pages to a Document Using Thumbnails

You can add pages from one image document to another using thumbnails in the Web Client. By default, the Web Client uses the same Document Viewer to display each document. To use thumbnails to add pages from one image document to another, you must open at least one of the documents in a new window.

Open in New Window

You can view multiple documents at the same time using the **Open in New Window** right-click option.

1. While viewing a document, select another document from the retrieval list and right-click.
2. Select **Open in New Window**. This opens the new document in a separate window, while the old document remains in the original window.

**Note:** You cannot view documents retrieved from a text-based search in multiple windows, they must be viewed one at a time.

Options Button - Viewer Options

Selecting the **Options** button allows you to set the default behavior for the user interface of the Document Viewer for the following items:

- Thumbnail size
- Thumbnail zoom behavior
- Whether to show icons on a document page for notes and annotations
- Rubberband behavior
- Zoom region preferences
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](image) 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 **Save** 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.

**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.

---

**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.

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.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Page</td>
<td>Selecting First Page or Last Page immediately displays the first or last page in the document, respectively.</td>
</tr>
<tr>
<td>Last Page</td>
<td></td>
</tr>
</tbody>
</table>

©2011 Hyland Software, Inc.

127
Scale

The Scale feature provides options for viewing documents.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual Size</td>
<td>Displays the document without any viewer scaling (i.e., in the same aspect ratio in which it was acquired).</td>
</tr>
<tr>
<td>Fit Width</td>
<td>Scales the display of the current page in the viewer as adjusted per the maximum width of the page in the viewer.</td>
</tr>
<tr>
<td>Fit Height</td>
<td>Scales the display of the current page in the viewer as adjusted per the maximum height of the page in the viewer.</td>
</tr>
<tr>
<td>Fit in Window</td>
<td>Scales the display of the current page in the viewer according to the maximum viewer area.</td>
</tr>
<tr>
<td>Zoom In</td>
<td>Magnifies <em>(Zoom In)</em> or reduces <em>(Zoom Out)</em> the displayed area of the image in the viewer.</td>
</tr>
<tr>
<td>Zoom Out</td>
<td></td>
</tr>
</tbody>
</table>

*Note:* You can also access the Go To Page dialog by double-clicking the Page X of Y section of the status bar.
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:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>True Size</td>
<td>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.</td>
</tr>
<tr>
<td>Rotate Right</td>
<td>Rotates the image 90 degrees to the right.</td>
</tr>
<tr>
<td>Rotate Left</td>
<td>Rotates the image 90 degrees to the left.</td>
</tr>
<tr>
<td>Invert</td>
<td>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 <strong>Save Rotation</strong> does not save the inverted document.</td>
</tr>
<tr>
<td>Flip Horizontally</td>
<td>Displays the document as a mirror image across the vertical axis.</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flip Vertically</td>
<td>Displays the document as a mirror image across the horizontal axis.</td>
</tr>
</tbody>
</table>
**Show Folder Locations**

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

From a Document Search Results list or an open document, right-click and select **Show Folder Locations**. The Folders window displays the folders where the document statically or dynamically resides.

**Keyword Considerations for Show Folder Locations**

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

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

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

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, upload, indexing, re-indexing, viewing/modifying Keyword Values, and scanning.

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 or PDF document, select Edit | Keywords.

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.

![Keyword field with Disable Keyword Editing option selected.](image)

![Keyword field without Disable Keyword Editing option selected.](image)

**Date 09/05/1969**

**Date 09/05/1969**

**Note:** As a best practice, do not simultaneously open two instances of the **Add/Modify Keywords** dialog box or the **Re-Index** 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.

---

**Adding and Modifying Keywords**

Use the **Add / Modify Keywords** dialog box to view or modify the document Keyword Values. Right-click an open document or a document name from a Document Search Results list and select **Keywords**.

To view or modify an open OLE document’s Keyword Values in the Web Client, select **Edit | Keywords**.

The title line of the **Add/Modify Keywords** dialog box displays information about the document. The first two lines display the **Document Type** and document name respectively.

**Note:** If this document is checked out by another user, the Keyword Values will not be able to be modified regardless of privileges. The Add / Modify Keywords dialog box will be displayed, but all Keyword Values will be read-only.

**Note:** You cannot change Keyword Values on E-Forms that have been signed. When a form is signed, the Add/Modify Keyword dialog box becomes read-only and the re-index menu option is disabled for the form.
**Document Date**

The **Document Date** field displays the date the system matches in a search for documents based on a date or date range. You can change the date.

Dates use the Windows Regional Settings for formatting.

**Keywords**

The **Keywords** section displays the Keyword Types and Keyword Values currently associated with the document. The Keyword Value is blank if no Keyword Value is currently assigned.

You can use the **Add / Modify Keywords** dialog box to remove, add, or change a Keyword Value:

- To **remove** a Keyword Value from a document, delete the contents in the Keyword Type field.
- To **change** the value, edit the Keyword Value currently residing in the Keyword Type field
- To **add** another value for a Keyword Type, place the cursor in the Keyword Type field and press **F6** or double-click the Keyword Type name. An additional field is displayed for the Keyword Type. Fill in the additional Keyword Value.

**Note:** If you add another value of a Keyword Type within a Multi-Instance Keyword Type Group, another instance of the entire Multi-Instance Keyword Type Group will be added, not just the Keyword Type. This is because all Keyword Types within the Multi-Instance Keyword Type Group are part of a record. When you choose to duplicate the Keyword Type, you must duplicate the entire record. Single-Instance Keyword Type Groups and Keywords in Cascading Data Sets cannot be duplicated.

It is recommended that all Keyword Type Values are indexed when a Multi-Instance Keyword Type Group is duplicated, even if only one Keyword Value is different between the original Keyword Type Group and additional instances.

A calendar button is available next to date-based Keyword Types, allowing you to select a date from a calendar. A drop-down arrow may be available for some alphanumeric Keyword Types, allowing you to select a value from the Keyword Values in the list.

**Caution:** In some instances, changing Keyword Values will affect the appearance of your document. Change Keyword Values carefully.
Viewing and Editing Keywords for HTML Documents

You can view and edit the Keyword Values for a document that is currently displayed in the Document Viewer or a document that is listed in the Document Retrieval list. You can also view and edit the Document Date, which is the date assigned to a document when it was imported into the system.

Some documents have one or more Keyword Values displayed automatically when you open the document. These Keyword Types are configured by your system administrator to Auto Display.

1. View Keyword Values using one of the following methods:
   - From the Document Search Results list, select the document, then right-click and select Keywords.
   - From an open document, right-click and select Keywords.

   The dialog box is displayed, allowing you to add or modify Keyword Values.

2. Edit the Keyword Values as needed.

3. When finished, click Save to exit and save changes, or click Cancel to exit without saving changes.

   **Note:** You will be unable to modify Keyword Values if the Document Type is configured to Disable Keyword Editing, if the Keyword Values are locked by another user, or if you have insufficient privileges. Under these conditions, the values will be shown as read-only text (instead of editable field values), and the Save button will be disabled.

Mixed Case Keywords

Keyword Types configured for an Alphanumeric Data Type must be assigned a Character Case setting. There are two Character Case options that may be assigned to a Keyword Type: Uppercase Values and Mixed Case Values with an option for Case Sensitive Searching.

Keyword Types configured for Uppercase Values store the Keyword Value in uppercase letters, regardless of how the Keyword Value was entered upon indexing. Keyword Types configured for Mixed Case Values store the Keyword Value upon indexing exactly how it was entered, using both upper and lower case characters.

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

WITH CASE SENSITIVE SEARCHING APPLIED

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

WITHOUT CASE SENSITIVE SEARCHING APPLIED

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

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

Indexing Mixed Case Keyword Values

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

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

Masked Keywords

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

For example, a masked Keyword Type for Social Security Numbers may contain dashes as static characters and allow users to enter only nine numeric characters. The dashes are entered automatically as the subsequent characters are typed.

Depending on your system’s configuration, a mask may also be applied to certain Keyword Values upon retrieval.
In the Keyword Panels for retrieving, importing, and (re)indexing documents, the mask format is displayed below the Keyword Type field, as shown in the following example:

![Example of a mask format](image)

Mask formats are composed of characters that represent the types of characters accepted in a valid Keyword Value. Use the following table to determine what types of characters you must enter to satisfy a mask format for a masked Keyword Type.

<table>
<thead>
<tr>
<th>Mask Format Character</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Accepts alphabetic characters only. Special characters such as é or ñ are allowed.</td>
</tr>
<tr>
<td>X</td>
<td>Accepts any printable, alphanumeric character (except control codes).</td>
</tr>
<tr>
<td>0</td>
<td>Accepts numeric characters only.</td>
</tr>
<tr>
<td>9</td>
<td>Accepts numeric characters and the following symbols: +, -, *, .</td>
</tr>
<tr>
<td>Any other character</td>
<td>Accepts only the character displayed in the mask format. For example, if the mask format is 000-00-0000, then a dash must be entered for the fourth and seventh characters; all other characters must be numeric. Blank spaces may also be used. For example, if the mask format is 0 000, then the second character must be a space. The Web Client automatically enters these static characters for you as you type subsequent characters, so you do not need to type them manually. If a static character is at the end of a mask format, the Web Client enters it automatically when you type the second-to-last character.</td>
</tr>
</tbody>
</table>

### Viewing Read-Only Keywords

Sometimes you can view, but not modify some or all of the Keyword Values on a document.
This can be for any of the following reasons:

- Keyword Types can be configured to appear as read-only, as well as masked, to certain User Groups. If this is the case, the **Add/Modify Keywords** dialog box will resemble the following:

In the following example, the **PO #** Keyword Type is configured as read-only at the Document Type level. The user is unable to modify this Keyword Value. The user is able to modify the other Keyword Values.
• The User Group that you belong to does not have the right to Modify Keyword Values. The *Add/Modify Keywords* dialog box displays in read-only mode:

![Add / Modify Keywords dialog box]

• When you elect to view Keyword Values on a document, OnBase displays a message that someone has the document checked out, or locked. The *Add/Modify Keywords* dialog box displays in read-only mode. Depending on your system setup, this happens if a document is checked out by another user, or if it is persistently checked out.

**Note:** When you open *Add/Modify Keywords* or the *Re-Index* dialog box, the document is locked for your use so you can modify Keyword Values and save the changes. The document is unlocked when the dialog box is closed. When another user attempts to Add/Modify Keyword Values or re-index and a document is locked, the user can view the Keyword Values, but not modify them.
Records of Information Using Multi-Instance Keyword Type Groups

Most Document Types are assigned several Keyword Types, whose values contain information about the document. Some documents have multiple values for one Keyword Type. For example, a checking statement could have a Keyword Type called First Name that has both John and Sarah as values.

For more information, see the section Adding Multiple Values to a Keyword Type on page 149.

Because documents can contain multiple sets of Keyword Values, Document Types have the ability to maintain records of information. A record of information is a group of Keyword Types whose individual Keyword Values maintain a relationship with each other when additional Keyword Values are added to the document.

For more information, see Keyword Types Relationship Example in Document Retrieval on page 14.

In order to maintain a relationship between Keyword Types, the Keyword Types must be in a Multi-Instance Keyword Type Group.

For more information, see Keyword Type Groups on page 12.

Your system administrator configures Document Types with Keyword Types and Keyword Type Groups.

AutoFill Keyword Set Instance

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

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

Using AutoFill Keyword Sets when Indexing or Re-Indexing

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

1. From the Import Document dialog box, enter the first Keyword Value and press the Tab key on the keyboard. The remaining values for the remaining Keyword Types in the AutoFill Keyword Set will populate in their respective fields. If you entered a Primary Keyword Value that has more than one AutoFill Keyword Set associated with it, the Select Keyword Set dialog box is displayed. Continue to Step 2. Otherwise, skip to Step 6.

**Note:** In the OnBase Web Client, if the Primary Keyword Value is the last Keyword Value in the panel, you must press Shift + Tab to trigger the AutoFill Keyword Set.

**Note:** If you delete or modify any Secondary Keyword Values and want to use the same AutoFill Keyword Set to re-populate them, you must first clear all Keyword Values by clicking Clear Keywords or Clear All.

2. If you are prompted to select which AutoFill Keyword Set to use, the Primary Keyword Value has more than one AutoFill Keyword Set associated with it. For example, both the Plaintiff and the Defendant may share the same Case#, so there may be two separate sets of values for a Case# Primary Keyword Value.
   - Depending on how your system is configured, you may be allowed to choose one or more of the AutoFill Keyword Sets.
   - If you are permitted to select only one set, the values of your selected set are displayed in the indexing fields.
   - If you are permitted to select multiple AutoFill Keyword Sets, the document is indexed with values from both AutoFill Keyword Sets.

3. Select the AutoFill Keyword Set(s) from the list and click OK.

4. Keyword Values are displayed according to the order in which their associated Keyword Types are configured to display on the Document Type. Depending on the AutoFill Keyword Set’s configuration, these values may be read-only.

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

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

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

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

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

**Note:** Every workstation that will be accessing External AutoFill Keyword Sets must have an ODBC connection that has the same name as the one configured in the Configuration module. This includes workstations that access the system through the Desktop Client. See your system administrator for details.

In the case of Web Server, only the Web Server itself must have the ODBC connection, not the client workstations.
**RE-INDEXING WITH AUTOFill KEYWORD SETS**

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

**Caution:** AutoFill Keyword Sets may unexpectedly re-populate Secondary Keyword Values when re-indexing to a Document Type associated with the same Keyword Type Group (KTG) or Multi-Instance Keyword Type Group (MIKTG) as the current Document Type. For more information, see Considerations for Re-Indexing Documents and Adding or Modifying Keyword Values on page 154.

3. Select the **Document Date** using the Calender or by entering a date in the field.
4. If necessary, modify the Keyword Values on the document:

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

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

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

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

   If you are permitted to select more than one AutoFill Keyword Set, the document is indexed with Keyword Values from all AutoFill Keyword Sets. Only one instance of a Keyword Value common to both sets is displayed. Additional instances of Keyword Types are added to hold Keyword Values not common to both AutoFill Keyword Sets.
Note: If you delete or modify any secondary Keyword Values and want to use the same AutoFill Keyword Set to re-populate them, you must first clear all Keyword Values by clicking Clear Keywords or Clear All.

5. Add Keyword Values to any Keyword Types that are not associated with the previous Document Type but are associated with the new Document Type.
6. Click Re-Index.

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

Use Keywords for Document Retrieval

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

Keyword Types that Contain Relationships

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

Cascading Data Sets

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

Multi-Instance Keyword Type Groups

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

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

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

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

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

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

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

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

Add Another Value to a Keyword

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

Note: You cannot add additional instances of Keyword Types that are part of a Cascading Data Set.

Multi-Instance Keyword Type Groups

If you double-click on a Keyword Type name within a Multi-Instance Keyword Type Group, or place the cursor inside the Keyword Value field and press F6, another instance of the entire Multi-Instance Keyword Type Group will be added, not just another instance of the Keyword Type.
If a Multi-Instance Keyword Type Group contains a Cascading Data Set, double-clicking a Keyword Type name or placing the cursor inside the Keyword Value field and pressing F6 does not add another instance of the Multi-Instance Keyword Type Group. To add another instance of the Multi-Instance Keyword Type Group, double-click the name of the Multi-Instance Keyword Type Group in the Keywords pane.

**Using Drop-Down Select Lists**

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

**Note:** To reduce the number of values displayed when accessing a drop-down select list, you should type several characters into the Keyword Type field before expanding the drop-down select list.

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

For information about Cascading Data Sets, see Cascading Data Sets on page 6.
Keyword Operators and Extended Search Features

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

Relational (Comparative) Operators

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

Note: Depending on your solution’s configuration, relational operators may be unavailable. If no operators are available, then you must enter the exact Keyword Value you want to retrieve. To broaden your search, you can include wildcard characters (* and ?) in your search criteria.

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

The following operators may be available to search for:

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>=</td>
<td>An exact Keyword Value match.</td>
</tr>
<tr>
<td>&lt;&gt;</td>
<td>Keyword Values that are not equal to the specified value.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Keyword Values that are greater than the specified value.</td>
</tr>
<tr>
<td>&gt;=</td>
<td>Keyword Values that are greater than or equal to the specified value.</td>
</tr>
<tr>
<td>&lt;</td>
<td>Keyword Values that are less than the specified value.</td>
</tr>
<tr>
<td>&lt;=</td>
<td>Keyword Values that are less than or equal to the specified value.</td>
</tr>
<tr>
<td>&quot;</td>
<td>The string literal operator used with alphanumeric Keyword Types. Selecting this button will match the literal string. If a wildcard is used in the string, the search will look for the exact match including the wildcard.</td>
</tr>
</tbody>
</table>
Logical (Boolean) Operators

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

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

Note: Depending on your solution's configuration, logical operators may be unavailable. If you create multiple instances of a Keyword Type and there are no operators available, then the values you enter are treated as though they are joined by And.

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

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

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

**Wildcard Characters**

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

**Note:** Depending on your system’s configuration, some alphanumeric Keyword Types may not allow wildcard characters to be used.

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

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

**Adding Multiple Values to a Keyword Type**

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

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

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

If you cannot add an additional Keyword Values, your Keyword Types may be in a Keyword Type Group. To be able to add additional Keyword Values to Keyword Types in Keyword Type Groups, the Keyword Type Group must be Multi-Instance Keyword Type Group. Additional values also cannot be added if the Keyword Type is part of a Cascading Data Set. See your system administrator if you have questions about the configuration of Keyword Types on the Document Type.
**Note:** If you double-click on a Keyword Type name within a Multi-Instance Keyword Type Group, another instance of the entire Multi-Instance Keyword Type Group will be added, not just another instance of the Keyword Type.

**Note:** When documents are indexed with multiple instances of the same Keyword Type, multiple entries for the same document can be returned in a Document Search Results list. This occurs because of the query that OnBase runs when attempting to search for multiple Keyword Values. For example, a document has two values for a Keyword Type; Value A and Value B. When retrieving documents that have Value A OR Value B, the Document Search Results list contains two instances of the same document. This is because the query does not include a DISTINCT clause, meaning that results are not limited to show one instance of a document. This is done because a large query with a DISTINCT clause could potentially cause performance issues with the OnBase database.
**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, upload, indexing, re-indexing, viewing/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 154.

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** 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. If necessary, change the document’s Document Type by selecting a new Document Type from the **Document Type** drop-down list. All Document Types that you have rights to create are displayed.
4. 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 you enter a Keyword Value for the City Keyword Type and switch to a different Document Type that also contains the City Keyword Type, the City Keyword Value you entered is retained. This also applies to Keyword Types that are configured to use Default Keyword Values on the initial Document Type. These values will not be replaced, even if the new Document Type uses a different set of Default Keyword Values.

Note: Default Keyword Values are not retained if you select a different Document Type that also has Default Keyword Values configured for those Keyword Types. In this case, only the values for the second Document Type are populated.

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 154.

5. Change the Document Date, if desired. 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.

**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.

**Note:** Some Keyword Types may be configured to be uppercase only, while others may be configured to appear in mixed or lowercase.

**Note:** 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.

**Note:** 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.

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

   If the Keyword Type that you double-click belongs to a Keyword Type group, then it can only be duplicated if the group is a Multi-Instance Keyword Type Group. The entire group is duplicated, not just the selected Keyword Type.

9. Press Clear Keywords if you want to clear all existing Keyword Values and re-enter new values.

10. Click Re-Index to save your changes and re-index the document. Click Close to cancel changes.

**Note:** Be sure about the changes you make before saving. Once re-indexed, you can retrieve the document 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 Select 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 select 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.

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-modified values are saved.

**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 or not the document’s appearance is dependant on Keyword Values.

- **Affect Workflow**
  Keyword Values can affect Load Balancing and certain workflow actions, such as Doc - Set Document Type on Related Document. See the Workflow Help for details.

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

OnBase folders allow users to view and organize documents electronically, as they would with a folder of paper documents, but with the added benefits and security of OnBase. Users can access related documents in a way that is familiar, logical, and easy to use. Folder structures can be automatically created and populated based on business needs without user interaction.

OnBase folders allow users to store a document once and retrieve it from a familiar folder interface that can be configured to a department’s or user’s need. Because each document can reside in multiple folders, departments that prefer different folder structures can access the same document in different locations. Because there is only one actual document, changes to the document are reflected in all locations, even when the document resides in many folders.

Both folder creation and population can be automated to ensure that the folder structure is maintained and file sorting is accurate. This automation protects against accidental folder creation or documents being misfiled.

File Cabinet

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

Static Folder

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

- You can add OnBase documents to a static folder using the OnBase Client, Desktop, Web Client, and Unity Client.
- Adding a document to a folder does not physically move the document. Rather, the folder provides another way for users to easily access the document.
- Documents residing in a static folder do not have to share the same Document Type or Keyword Values.
Dynamic Folder

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

- A dynamic folder contains all documents that match specified Keyword Value criteria and Document Types. Whenever the folder is opened, its contents are updated automatically.

- Documents that are automatically pulled into a dynamic folder are not physically moved. The folder just provides another way for users to easily access the document.

- For documents to be added manually to a folder from within OnBase, the Folder Type must be static or both static and dynamic.

If a folder is both static and dynamic, documents whose Keyword Values do not match the folder’s can be placed in the folder manually. If a folder is dynamic only, documents cannot be manually placed in or removed from the folder from within OnBase.

Auto-Foldering

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

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

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

Related Folders

Related folders are OnBase folders that belong to specific Folder Types and share one or more common Keyword Values with the folder you are viewing. Related folders are not available for every folder. The Folder Type relationships and the Keyword Types that define them are set up in OnBase Configuration.

Related folders allow you to quickly access related information stored in different parts of the folder hierarchy. For example, suppose your folder system has customer claims and customer policy information stored in different branches of the folder tree. If the policy folders are designated as related to the claim folders, then you can access each customer’s policy folder directly from the claim folders.
Opening File Cabinets and Folders

File cabinets contain folders, which contain documents that are placed in the folder from the OnBase Client interface, or that are automatically pulled into the folder according to Keyword Type Values (dynamic folders).

In the Web Client you can view documents in folders, and in some cases, you can delete documents in folders. Folders are accessed in the Web Client from the Context drop-down select list.

Your system administrator configures the file cabinets and Folder Types which folders are based on. You may not have access to file cabinets and folders, depending on your system's configuration. You must have appropriate rights to view, modify, add documents to, or remove documents from folders.

Opening the Folders Window

To access folders from the Web Client, click Folders in the context drop-down select list.

Tip: Open multiple Folders windows by repeating this step. Doing so allows you to compare documents residing in different folders.
The **Folders** window displays all available file cabinets and folders. The following diagram highlights components of the **Folders** window.

1. **Hide/restore Folder Tree**
2. **Add to Favorites button**—Click to add the Folders window to your favorites.
3. **Hide/restore Document Viewer**
4. **Auto-Name of the selected document**
5. **Content type of the selected folder**
6. **Folder search button**
7. **Document Viewer**
8. **Folder Tree pane**—Displays file cabinet and folder hierarchy
9. **Documents pane**—Lists all documents in the selected folder
10. **Child Folders pane**—Displays child folders (subfolders) of the selected folder
11. **Refresh button**—Refreshes the pane
12. **Expand/collapse pane**
13. **Folder tabs**
Tip: To resize folder panes, place your cursor over the border between two panes, and then click and drag the border to the new height or width. To collapse or expand a pane, click the button in the upper-right corner of the pane.

Opening a Folder

1. To view the contents of file cabinets and folders, click the ➕ to the left of the file cabinet or folder.
2. Folders are displayed in the Folder Tree.
3. Select a folder to display its contents.
   - The Child Folders pane lists all child folders of the selected folder.
   - The Documents pane lists all documents in the selected folder.
   - The first document in the selected folder may be displayed in the document viewer, depending on your system’s settings.
   - If the folder is configured to display its child folders as tabs, the first child folder is opened.

   A pop-up list or search dialog box may be displayed, prompting you to specify the child folder to open. This behavior varies depending on the folder’s configuration. See the following topics for more information:
   - Accessing Folder Search by Clicking a Folder on page 165
   - Working with Folder Pop-up Lists on page 166

Note: Depending on the Folder Type configuration, the Documents pane may list all static documents residing in the selected folder’s child folders. Static documents are those that have been manually added to a folder. See your system administrator for information about your folder system’s configuration.

4. To open a folder from the Child Folders pane, use one of the following methods:
   - Double-click on the folder.
   - Select the folder, right-click and select View Selected.
   - If child folders are displayed as tabs (in the right pane), click the tab to open the folder.
5. To open a document, select the document from the Documents pane.
Opening Multiple Folders Windows

You can open multiple Folders windows from the OnBase Web Client. This feature lets you work in multiple folders concurrently and compare different folders side-by-side. To open another Folders window, click Folders in the Web Client’s context drop-down select list.

Opening Documents and Folders in New Windows

You can open multiple documents or folders in separate windows by using the Open in New Window option. This option lets you view multiple documents and folders simultaneously.

- To open a folder in a new window, select the folder and choose Open in New Window from the right-click menu.
- To open a document in a new window, select the document from the Documents pane and choose Open in New Window from the right-click menu.
Moving Up a Level from a Folder Tab

When you select a folder whose child folders are displayed as tabs, the first child folder is automatically opened. As a result, the child folders are never displayed in the Child Folders pane, where they need to be displayed for tasks like editing their Keyword Values.

To move up a level and display the child folder in the Child Folders pane, click the up-level tab available above the child folder tabs:

This tab is available when the current folder is configured to be displayed as a tab.

Clearing a Selected Document or Folder

You can clear a selected document or folder using the Clear Selected option. For example, if your system is configured to automatically display the first document in a folder, you can use the Clear Selected option to clear the document from the viewer.

The Clear Selected option is available from the right-click menus in the Child Folders and Documents panes.
Accessing Folder Search by Clicking a Folder

Some Folder Types are configured to display the Find Folder dialog box when a folder of that Folder Type is selected. The Find Folder dialog box allows you to search for child folders of the selected folder. Once you retrieve the desired folder, the folder is inserted into the Folder Tree pane for that session only.

For more information about folder searching, see Searching for Folders on page 167.
Working with Folder Pop-up Lists

Upon selecting a folder or file cabinet, you may see a pop-up list displaying child folders of the selected folder. You can filter, use right-click options on, and open folders in this list.

1. To find a specific folder, start typing its Auto-Name in the filter bar above the list.
   For example, to find records for a customer whose name begins with W, you could type Records for W.

2. Double-click a folder to open it. The folder is added to the Folder Tree pane.
   The following icon is also displayed in the Folder Tree pane under the parent folder. This icon indicates that the parent folder contains more folders that are not currently displayed.

3. Repeat these steps for each child folder you need to view. Each subsequent folder is added to the Folder Tree pane, making it easy to work back and forth between them.
Searching for Folders

You can search for folders using the Find Folders dialog box, which is displayed when you initiate a folder search from the Folders window or when you open a folder that is set up for child folder searching.

To initiate a folder search:

1. Do one of the following:
   - Right-click in the Folder Tree or Child Folders pane, and then select Find Folder.
   - Click the Find Folder button.

**Note:** These options are unavailable if you accessed the Folders window from a portlet.

The Find Folder dialog box is displayed.
2. From the **Folder Type** drop-down select list, select a Folder Type. The **Find Folder** dialog box displays any Keyword Types assigned to the selected Folder Type.

3. Enter Keyword Values as necessary. If a Folder Type requires a Keyword Value to be provided (not left blank) the required Keyword Type is displayed in red.

You can use all functionality of Keyword Values in the folder search, including adding additional instances of a Keyword Type or Keyword Type Group, or using Wildcard or Boolean operators to narrow the search. For more information, see the related Help topics.

**Note:** If the Folder Type has one or more Keyword Types, then at least one valid Keyword Value must be entered. You cannot retrieve folders by entering only space characters or asterisks (*).

4. Click **Search** to find all folders matching the criteria. Folders are displayed in the **Child Folders** pane.

**Note:** A folder search may return the same folder multiple times if the folder is indexed with multiple instances of a Keyword Type Group and each instance contains the same value for the Keyword Type you searched on.

5. Double-click a folder to display its documents in the **Documents** pane.

   Depending on the Folder Type, the first document may be displayed in the Document Viewer.

**Tip:** When you perform a folder search, your search parameters are saved and added to the bottom of the Folder Tree. Click a search to run it again. Past searches remain available until the File Cabinets window is closed.
Retrieving Related Folders

If configured, related folders allow you to quickly access related information stored in different branches of the folder tree. Related folders and their availability vary per system. See your system administrator for information about your system’s folder configuration.

1. Select a folder in the Folder Tree or Child Folders pane.
2. Right-click and select Related Folders. This option is available only if the selected folder is set up for related folders.
   - If there is only one related folder, the folder is opened automatically in a new Folders window.
   - If there are multiple related folders, they are listed in the Related Folders pane of a new Folders window.
   - If related folders cannot be found for the selected folder, OnBase informs you by displaying a message.
Applying a Folder Template

Folder templates help you navigate a folder’s contents by doing the following:

- Filtering the view of folder contents when you open the folder. A template can be configured to display documents in a certain order by Document Type, or to display only documents of a certain Document Type by default.

- Providing a visual indicator of documents missing from the folder. For example, if a Patient Information folder should contain the patient’s Driver’s License, a folder template may display an error message if the Driver’s License Document Type is missing from the folder.

- Identifying whether documents are missing certain Keyword Values, which may have been unavailable when the documents were indexed.

- Sorting documents so they are displayed in a consistent sequence.

To apply or remove a template:

1. Right-click anywhere within the Documents pane and select Template.

   The Apply Template dialog box is displayed.

2. Select a template. If the folder has a template applied and you want to remove it, select <<No Template>> to display all the contents of the folder.
3. Click **OK**.

   The **Documents** pane displays any applicable documents or information. When a template is applied, the pane’s heading changes to **Template**.

### Applying Folder Filters

You can filter and sort documents in a folder using folder filters. Folder filters let you perform the following tasks:

- Organize and sort documents by Keyword Value, name, or date. Filters display information about each document in columns that you can use for sorting.
- Display only documents that have a specific Keyword Value. Filters that use forms let you filter the documents by submitting Keyword Values on the form.
- Display only documents within a subset of Document Types. For example, you may have a dynamic folder with multiple Document Types assigned to it, but you need quick access only to specific Document Types on a regular basis.

Filters are like folder templates in that both can display a subset of documents within a folder, but templates and filters perform different tasks. When choosing between a filter or template, consider what you want to accomplish. Whereas folder templates help ensure that a folder has a complete set of documents, folder filters let you quickly see information about documents organized in sortable columns.

A folder template and a folder filter cannot be applied to a folder simultaneously. If you apply a filter to a folder with a template applied, the template is removed before the filter is applied. If you apply a template to a folder with a filter applied, the filter is removed before the template is applied.

Some folders may have a default filter applied when the folder is opened. When a filter is applied, the **Documents** pane is divided into columns with headers at the top of the pane. To determine which filter is applied, right-click within the **Documents** pane and select **Filter Documents**. The applied filter has a check mark next to its name. To remove the filter, select **<No Filter>** from the **Filter Documents** options. Removing the filter may be necessary to display all the documents in a folder.
To apply a folder filter:

1. Right-click within the Documents pane and select Filter Documents.
   The Filter Documents dialog box is displayed.

2. Select a filter.
3. Click OK.
4. If a form is displayed in a separate window, type the Keyword Values to filter the folder by, and submit the form.
5. To sort the filtered list of documents, click the header above the column you want to sort by.
   For example, if one column contains the Document Date, click the header to sort documents in ascending chronological order; click the header again to sort documents in descending chronological order.

Adding and Removing Documents

The following topics describe how documents are added to and removed from folders.
- Adding Documents to Dynamic Folders on page 173
- Adding Documents to Static Folders on page 174
• Copying or Moving Documents to Folders on page 176
• Removing Documents from Folders on page 178

**Adding Documents to Dynamic Folders**

A dynamic folder contains Document Type and Keyword Value criteria that OnBase will use to find documents.

When you open a dynamic folder, documents that match the criteria populate the folder automatically. Each time the folder is opened, the query will be run again, finding any new documents that match the criteria for the folder.
Adding Documents to Static Folders

If you have sufficient privileges, you can add documents residing in OnBase to static folders. A single document can reside in multiple folders because folders contain pointers to documents rather than actual copies.

1. Select one or more documents from a Document Search Results list.
2. Right-click the document(s) and select **Send To | Folder**. The **Select A Target Folder** dialog box is displayed.

3. Select the folder where you want to add the document(s).
4. Ensure the **Folder Type** bar above the folder tree says **Static** or **Static/Dynamic**. Documents cannot be manually added to a dynamic folder.

5. Click **OK** to add the document(s) to the folder.

If OnBase won’t let you add the document to a folder, see the following section, **If You Cannot Add a Document to a Folder**.

**IF YOU CANNOT ADD A DOCUMENT TO A FOLDER**

You may be unable to add a document to a folder under any of the following conditions:

- You have insufficient privileges to add documents to the folder.
- The folder’s Folder Type is dynamic. Dynamic folders are populated automatically based on document Keyword values. Documents cannot be added to dynamic folders manually unless the folder is both static and dynamic.
• The folder’s Folder Type is set up to only contain other folders.
• The document already resides in the folder. A document cannot be added twice to the same folder.
• The folder is locked by another OnBase user, process, or module. For example, if a user is modifying the folder’s Keyword Values in the OnBase Client, then you cannot add a document to the folder.

**Copying or Moving Documents to Folders**

If you have sufficient privileges, you can organize folder contents by moving and copying documents to static folders.

1. Open the folder containing the document you want to move or copy.
2. Select the document you want to move or copy from the **Documents** pane. To select multiple documents, press **CTRL** as you select each one.
3. Right-click and select one of the following options:
   
   - Select **Copy To Folder** to copy a document from its current folder to another. Each folder then contains a link to a single copy of the document. If the document is modified in one location, the changes are reflected in both locations.
   
   - Select **Move To Folder** to remove the document from its current folder and add it to another. This option is unavailable if the folder is dynamic or if you have insufficient privileges to remove the document from its current folder.

   The **Select A Target Folder** dialog box is displayed.

4. Select the folder where you want to add the document(s).
5. Ensure the **Folder Type** bar above the folder tree says **Static** or **Static/Dynamic**. Documents cannot be manually added to a dynamic folder.

![Select A Target Folder -- Web Page Dialog](image)

6. Click **OK**.

   If OnBase won’t let you add a document to the folder, see If You Cannot Add a Document to a Folder on page 175.

**Removing Documents from Folders**

If you have sufficient rights, you can remove documents from static folders. Select the document from the **Documents** pane, right-click, and select **Remove From Folder**.

If a document is removed from a folder, it will not be removed from OnBase, just that folder.

You cannot manually remove documents from a folder that is dynamic. Dynamic folders automatically pull in documents based upon Keyword Value criteria.
Adding and Deleting Folders

These topics describe how to add and delete folders:

- Adding a Folder on page 179
- Deleting a Folder on page 180

**Note:** You must have appropriate User Groups and Rights for folders.

**Adding a Folder**

The following procedure describes how to create a new folder from the *Folders* window.

1. In the *Folder Tree* pane, select the folder (or file cabinet) into which you want to place the new folder.
2. Right-click and select **New Folder**. The *New Folder* dialog box is displayed.
3. Select a Folder Type for the new folder. Folder Types define the following folder characteristics:
   - Static or dynamic properties (how documents are filed)
   - Assigned Keyword Types (used for searching and organization)

4. Index the new folder.
   - If the folder shares Keyword Types with the selected parent folder, then the folder automatically inherits values for these Keyword Types from the parent folder. You can change these values, if necessary.
   - If a Folder Type requires a Keyword Value to be filled in (not left blank) the Required Keyword Type is displayed in red. You must supply a Keyword Value to create and save the new folder.
   - If the folder uses a Multi-Instance Keyword Type Group, then the Keyword Type fields are in a collapsed state. Expand them by clicking the symbol to the left of the first Keyword Type name. You can add another instance of the Keyword Type Group by double-clicking the Keyword Type name or by clicking in a Keyword Type field and pressing F6.

5. Change the **Folder Date** if desired.

6. Click **Save**. The new folder is added to the **Child Folders** pane.

### Deleting a Folder

You can delete folders by using a right-click option. Deleting a folder does not remove its documents from OnBase. The documents remain available through other Document Retrieval methods.

Your ability to delete a folder depends on your privileges to the folder and the child folders it may contain. If you attempt to delete a folder that contains a child folder, and you do not have privileges to delete that child folder, then you cannot delete the parent folder or the restricted child folder(s). Child folders you have privileges to delete are deleted.

If your solution uses the Records Management module, you cannot delete managed folders or folders that contain managed folders using this method. If you attempt to delete a folder that contains both managed and unmanaged folders, the unmanaged folders you have privileges to delete will be deleted.

---

**Note:** Managed folders require a Records Management license.
Note: Deleted folders can only be restored from Folder Maintenance in the OnBase Client by your system administrator.

To delete a folder from the Folders window:

1. From the Folder Tree pane or Child Folders pane, select the folder you want to delete.
2. Right-click and select Delete.
3. You are prompted to confirm that you want to delete the selected folder and all of its child folders. Click OK. The selected folder is removed.

Changing Folder Keyword Values

If you have the appropriate user rights, you can change the Keyword Values assigned to a folder.

Note: Depending on the Folder Type of the folder (Static or Dynamic), changing its Keyword Values may change the contents of the folder, removing existing documents and adding new documents to the folder. Ensure you understand the ramifications of changing Dynamic Folder Type Keyword Values before proceeding. See your system administrator for additional information.

1. From the Folder Tree or Child Folders pane, select the folder.
2. Right-click and select Keywords.
3. The **Add/Modify Keywords** dialog box displays the Keyword Types and values for the selected folder along with the Folder Type name, the folder Auto-Name (based upon the Keyword Values) and the **Folder Date**, which by default is the folder creation date.

4. Edit the Keyword Values.

5. When finished, click **Save Keywords**. The Keyword Values are changed.

- Depending on your system’s configuration, one or more values may be masked or read-only. Keyword Values may be read-only because another user or process is working with them, or because you lack privileges to modify them.

- If the folder uses a Multi-Instance Keyword Type Group, the Keyword Type fields are in a collapsed state. Expand them by clicking the symbol to the left of the first Keyword Type name. You can add another instance of the Keyword Type Group by double-clicking the Keyword Type name or by clicking in a Keyword Type field and pressing **F6**.

For information about working with Keyword Types, see Working With Keywords on page 132.
Printing Folder Contents

The OnBase Web Client lets you print all of a folder’s contents at one time, including documents residing in any child folders. To print all the documents in a folder and its child folders, complete the following steps:

1. Select the folder you want to print in the Folder Tree, the Child Folders pane, or in a pop-up list.

2. Right-click the folder and select Print. The Print dialog box is displayed.

3. Adjust the print options as needed. Available options may vary depending on your system’s setup. For a description of OnBase printing options, see Printing Documents on page 273.

4. Click OK. All documents in the folder and its child folders are printed.

Note: Your privileges to print documents may be restricted by Document Type. If you need to print every document in a folder but cannot, contact your system administrator.
**Search Button**

When using any Document Retrieval method to locate a document (Retrieve a document using Keyword Values, note text, document text, or Custom Queries) or when searching for a folder, the **Search** Button initiates the search using the criteria you have entered.

**Clear Keywords Button**

Available from many Document Retrieval functions using Keyword Values as search criteria. Any time you decide to change your search criteria, you can empty all the Keyword Type fields by clicking the **Clear Keywords** button.

**Clear All Button**

Available from many Document Retrieval functions. Any time you decide to change your search criteria, you can clear all search criteria by clicking the **Clear All** button.
SENDING AND RECEIVING MAIL

If you have appropriate privileges, you can send internal mail to communicate with other OnBase users and to send them OnBase documents. You can read messages from other users from your OnBase inbox. If you need to send documents to non-OnBase users, you can e-mail OnBase documents externally to an e-mail address.

- To send documents to another OnBase user, see Send To | Internal User on page 185.
- To check your OnBase inbox, see Checking Internal Mail on page 190.
- To e-mail documents externally, see E-Mailing Documents on page 192.

Send To | Internal User

Internal Mail lets you send documents and messages to other OnBase users.

- To send a document and a message to another OnBase user, see Sending OnBase Documents to Other OnBase Users on page 186.
- To send only a message to another OnBase user, see Sending Messages to Other OnBase Users on page 188
- To view messages and documents from other OnBase users, see Checking Internal Mail on page 190.
Sending OnBase Documents to Other OnBase Users

1. From the Document Search Results list or an open document, right-click on the selected document(s) and select Send To | Internal User.

**Note:** You may send only documents that you have rights to send as mail.

The Send Mail dialog box is displayed:
2. Click the To link and select any Internal User(s) from the Address Book.

![Address Book](image1)

3. Click the Add button to add a specified users into the Send To: list or click the Add All button to add all users to the Send To list.

4. In order to remove users from the Send To list, click the Remove button or the Remove All button.

5. Enter a Subject. You can enter up to 99 characters.

6. Select the Read Receipt Requested check box to request a read receipt.

7. Enter a message of up to 250 characters. The number of characters you have remaining is displayed below the Message field.

**Note:** Each space is treated as a single character, each new line counts as two characters. When replying and forwarding, the right angle brackets (>) in the message field count as a single character and the FW: counts as four characters in the subject field.

8. Click Send.
Sending Messages to Other OnBase Users

1. Ensure that you are in User mode by selecting User in the Context drop-down select list. Your Mailbox is displayed.
2. Click the \[Send Mail\] icon.

For more information on Sending Internal Mail, see Send To | Internal User on page 185.

**Note:** You cannot send attachments from this particular dialog box.
Checking Internal Mail

1. Ensure that you are in User mode by selecting User from the Context drop-down select list. Your inbox is displayed.

The Mailbox lists any internal mail you might have received.

Note: If a user gets sent an attachment in internal mail they will be able to view it, regardless of rights. If the user does not have rights to modify document Keyword Values, they will not have the ability to Add/Modify Keyword Values or re-index the attached document.

2. To read a message, double-click it from the list. The message is displayed in the viewer.
3. To view an attached document, click the document’s link in the message header.

4. For more options, click one of the buttons described in the following table:

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reply</td>
<td>lets you reply to the OnBase user who sent you the message.</td>
</tr>
<tr>
<td>Forward</td>
<td>lets you forward the message and attachment(s) to other OnBase users.</td>
</tr>
<tr>
<td>Delete</td>
<td>deletes the message.</td>
</tr>
<tr>
<td>First Message</td>
<td>displays the message you received most recently.</td>
</tr>
<tr>
<td>Previous Message</td>
<td>displays the message listed above the message you are currently viewing.</td>
</tr>
<tr>
<td>Next Message</td>
<td>displays the message listed below the message you are currently viewing.</td>
</tr>
<tr>
<td>Last Message</td>
<td>displays the oldest message in your inbox.</td>
</tr>
</tbody>
</table>

5. To check for new messages, right-click the message list and select Refresh.

**Deleting Mail**

From the inbox, select the message and click the Delete button, or right-click on the message and select Delete Selected.
E-Mailing Documents

There are two ways to e-mail documents that you have retrieved:

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

Either method attaches a copy of the document(s) to a blank e-mail message that you 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.

Note: 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:
\ and / are substituted with -
: is substituted with ;
* is substituted with +
? is substituted with !
< is substituted with [
> is substituted with ]
" is substituted with '
| is substituted with !

Note: 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.

E-Mailing a Document

E-mailing a document in the Web Client requires that you have a functional, MAPI-compliant e-mail client or SMTP-compliant e-mail client. Commonly used MAPI e-mail clients are Microsoft Outlook and Novell GroupWise. IBM Lotus Notes is an example of a commonly used SMTP e-mail client. Client mail programs that deviate from strict MAPI or SMTP 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.

1. From the Document Search Results list, select the document(s) that you want to e-mail, right-click, and select **Send To | Mail Recipient**.
   
   From an open text or image document, right-click and select **Send To | Mail Recipient**.

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

   ![Mail Document dialog box](image)

3. Select a **Content Type**. If you select `application/pdf` or `image/tiff`, the **Advanced...** button is enabled.

**Caution:** If you select a Content Type of >>>Native Format for a multi-page image document, only the first page of the document will be attached to your e-mail message. In order to send the entire document, you must select a different Content Type.

**Note:** If you are using Microsoft Outlook as your e-mail client and you select Rich Text as the **Content Type**, your Outlook signature will not be included in the body of your e-mail message.

**Note:** Documents that cannot be converted to the selected content type are sent in their native format.
4. Click the Advanced... button. The Advanced Options dialog box is displayed. Select the desired options, then click OK.

![Advanced Options dialog box]

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annotation and/or Note Icon On Document</td>
<td>The document is e-mailed with any annotations and note icons displayed on the document. If you move a note before e-mailing the document, the note is displayed in its last saved location. Note locations are saved when a document is closed.</td>
</tr>
<tr>
<td>Note Text On Document</td>
<td>The document is e-mailed 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 e-mailing the document, the note is displayed in its last saved location. Note locations are saved when a document is closed.</td>
</tr>
<tr>
<td><strong>Note:</strong></td>
<td>When printed, annotations and icons are the same size as they appear on the document when it is scaled to 100%.</td>
</tr>
</tbody>
</table>

5. Select one of the following buttons:

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>Sends all pages. This is the only available option for documents saved using the Send To</td>
</tr>
<tr>
<td>Current Page</td>
<td>Sends only the current page. This is the only choice when &gt;&gt;&gt;Native Format is selected as the Content Type for a GIF, JPEG, or PNG document.</td>
</tr>
</tbody>
</table>
6. Depending on your system’s configuration, the Notification window may be displayed. The Notification 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 notification you select will only apply to the first document selected.

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

7. Click **OK**. OnBase displays an e-mail message with the selected document page(s) attached.

8. Enter the recipient(s) of the message.

9. Type the body of the message.

10. 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** or **text/plain**.

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

Envelopes provide a way to bundle documents together for easy access, or to easily e-mail the group of documents at one time.

Envelopes are similar to folders from a document retrieval perspective. However, there are some key differences:

- Only the user that created an envelope can see its contents.
- Folders are based on Folder Types configured by your system administrator.
- Some Folder Types are designed to automatically pull documents in based upon Keyword Value and Document Type. Documents residing in envelopes require no common characteristics.
- Some Folder Types do not allow users to manually add documents to them, whereas envelopes do.
- A system administrator must configure the file cabinet in order for a user to be able to create folders.
- Not all Folder Types are user-creatable. This is determined by your system administrator. If you have proper privileges, you can create envelopes.
- Some documents automatically create the folder structure as they are imported into OnBase.
- You cannot search for envelopes based upon Keyword Value.

Envelope

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

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

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

Creating and Deleting Envelopes

This topic describes how to create, delete, and set share permissions on envelopes in the OnBase Web Client.

Note: You must have appropriate privileges to use and share envelopes. You cannot delete another user’s envelopes. The only envelopes available to you upon logon are the envelopes you created or those that are shared with you.

Creating a New Envelope

1. Ensure that you are in the User context. Select User from the context drop-down select list.
2. Select **Envelope** from the User mode drop-down select list.

   ![Envelope panel](image)

   The **Envelope** panel is displayed.

3. Click the **New** button to display the **New Envelope** dialog box.

4. In the **Envelope Name** field, type the name for the new envelope.

5. Click **OK**. The system creates the new envelope and lists it in the **Envelope** panel.
Deleting an Envelope

1. Ensure that you are in the User context. Click User from the context drop-down select list.

2. Select Envelope from the User mode drop-down select list.

   The Envelope panel is displayed.

3. Select the envelope you want to delete.

4. Click the Delete button.

5. The system prompts you to confirm that you want to delete the selected envelope. Click Yes to delete the selected envelope and to remove it from the Envelope panel. Click No to cancel the deletion.
Note: Deleting an envelope does not remove its documents from the system. They will still be available through other document retrieval methods.

Sharing an Envelope

If you have sufficient privileges, you can share envelopes with other OnBase users.

1. Ensure that you are in the User context. Click User in the context drop-down select list.

2. Select Envelope from the User mode drop-down select list.

   The Envelope panel is displayed.

3. Select the envelope you want to share.
4. Click the **Share Envelope** button.

The **Share Envelope** dialog box is displayed.

![Share Envelope dialog box](image)

5. Select the users you want to share the envelope with from **Available Users**, and then click the **Add** button.

To share the envelope with all available users, click the **Add All** button.
6. To grant envelope permissions to a specific user, select the user and click **Settings**. The **Set Share Envelope Permissions** dialog box is displayed.

![Set Share Envelope Permissions](image)

Settings can be configured for only one user at a time. You can grant the following permissions: **Full Control**, **Add Items**, and **Delete Items**.

<table>
<thead>
<tr>
<th>Permission</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Control</td>
<td>Allows the selected user to do the following:</td>
</tr>
<tr>
<td></td>
<td>• Share the envelope.</td>
</tr>
<tr>
<td></td>
<td>• Add documents to the envelope.</td>
</tr>
<tr>
<td></td>
<td>• Remove documents from the envelope.</td>
</tr>
<tr>
<td>Add Items</td>
<td>Allows the selected user to add documents to the envelope.</td>
</tr>
<tr>
<td>Delete Items</td>
<td>Allows the selected user to remove documents from the envelope.</td>
</tr>
</tbody>
</table>

7. Click **Save** from the **Set Share Envelope Permissions** dialog box.

8. Click **Apply** to save all changes in the **Share Envelope** dialog box.

**Envelopes - Adding or Removing Documents**

This topic describes adding documents to envelopes and removing documents from envelopes.

**Adding Documents to Envelopes**

Add an open document to an envelope, or add one or more documents to an envelope from a document retrieval list by using the **Send To** option.

For more information, see Send To Envelope - Adding Documents to an Envelope on page 205.
Removing Documents from Envelopes

1. Ensure that you are in the User context.
   Click **User** from the context drop-down select list.

2. Click **Envelopes** from the mode drop-down select list to open the **Envelopes** panel.

3. Select an envelope. OnBase displays a list of the envelope's documents.
4. Select one or more documents to be removed.

   **Tip:** You can select one document by clicking it, or select multiple documents by using standard Shift-click and Control-click techniques.

5. Right-click within the list, and select **Remove From Envelope** to remove the document(s).
Send To Envelope - Adding Documents to an Envelope

If you have the appropriate user rights, you can send a document or a group of 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 **Select Envelope** dialog box is displayed.

2. Select an envelope from the drop-down select list.

3. To create a new envelope, click **New**. Enter the name for the new envelope and click **OK**. This creates the new envelope and returns you to the **Select 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 **Add**. The document is added to the selected envelope.

5. Click **OK** to close the confirmation message.
NOTES, ANNOTATIONS, AND MARKUPS

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, markups, and redactions.

Note: To use notes on an OLE document, such as a Microsoft Office document or PDF, you must use the Notes dialog box. See Notes Dialog Box on page 216.

Notes Overview

Electronic 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.

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 will 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:** If a date is included in the Auto-Name string for a note, the date format will be derived from the workstation regional setting, not the web server's setting.

**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.

**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. By default, the toolbar is displayed along the bottom of the Document Viewer.

Click a note tab to read the note or annotation.

Note: If you don't see any Note tabs, but there are notes on the document, ensure the Notes toolbar is visible.

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.

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 in the Web Client, the number of notes on the document is displayed in the Note status bar.
Some notes are displayed open, and some you must open to view their contents.

**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.
- Click the note’s tab displayed in the Notes toolbar.
- Right-click on an open document and select **Notes | View Notes**.
- 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 selecting the note in the **Select Notes** dialog box and clicking **OK**.

**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.

- If you are using the HTML Web Client, double-click the note’s icon to open it.

### Moving Notes

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.

Some Note Types may be configured to always maintain the position where they were created. If you move a note, its new position is saved only if the Note Type is set up to be moveable. Your system administrator determines whether a Note Type should be moveable when the Note Type is configured.

**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 or Deleting Notes/Annotations

Ensure you have appropriate privileges for adding, editing, or deleting notes and annotations.
**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.

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 Web Client. For information about working with notes in these cases, see Add a Note to an HTML Document on page 213.

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.

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 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 to an HTML Document

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

1. To create the note, right-click on the document and select Add Note. The Add Note dialog box lists the available Note Types.

   ![Add Note Dialog]

2. Select a Note Type and click OK.

   The note is placed in the top left-hand corner of the document. It is always displayed in this position, with the text visible when the document is opened.

   ![Copy Stamp]

3. Edit or type a message in the note’s text box. Notes are limited to 250 characters.
4. You can minimize the note by double-clicking 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.

5. To delete a note, click the X in the note title bar. Click Yes to verify that you want to delete the note.

**Note:** You cannot add annotations to HTML documents.

---

**Edit Note or Annotation Text**

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

- **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.

**Note:** If you are unable to access the text box, you may not have user rights to edit the note.
**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, right-click on the note title bar and click **Privacy Options**. The **Note Type Privacy Options** dialog box is displayed.

2. Some options may be unavailable depending on how the Note Type was set up by a system administrator.

3. Select one of the following options to restrict other users from performing the corresponding action.

<table>
<thead>
<tr>
<th>Privacy Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disallow View</td>
<td>Selecting this check box disallows users from viewing the note.</td>
</tr>
<tr>
<td>Disallow Update</td>
<td>Selecting this check box disallows users from updating information on the note.</td>
</tr>
<tr>
<td>Disallow Delete</td>
<td>Selecting this check box disallows users from deleting the note.</td>
</tr>
</tbody>
</table>

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

**Deleting a Note**

To delete an existing note, right-click on the note title bar and click **Delete Note**. Click **Yes** when prompted to confirm.

To delete a note in the HTML Web Client, open the note and click the X in the note title bar.
Notes Dialog Box

If you have appropriate privileges, you can add, view, edit or delete notes using the Notes dialog box. The dialog box is accessible from the Document Search Results list, allowing you to work with notes without opening documents. For OLE documents, such as Microsoft Office documents, the Notes dialog box is accessible from the Edit menu or by clicking on the Note status bar.

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 status bar at the bottom of the viewer.

**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 Note from the Notes Dialog Box

1. Open the Notes dialog box using one of the following methods:
   - Select and right-click a document in the Document Search Results list, then select Notes.
   - From an open OLE document, such as a Word document, select Edit | Notes.
OnBase 11.0.0 Web Client

- Click on on the Note status bar

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

![Notes dialog box](image)

2. Select a note to view any note text.

**Adding a Note Using the Notes Dialog Box**

1. Open the **Notes** dialog box using one of the following methods:
   - Select and right-click a document in the Document Search Results list, then select **Notes**.
   - From an open OLE document, select **Edit | Notes**.
• Click on on the Note status bar

The Notes dialog box is displayed.

2. Select a Note Type from the list and click Add Note. The new note is added to the Notes list. Any default text is displayed in the note text box.

3. Add or modify text in the field provided.

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.

Clicking Close closes the Notes dialog box. The note remains attached to the document; any unsaved changes to note text are discarded.
**Editing a Note Using the Notes Dialog Box**

1. Open the **Notes** dialog box using one of the following methods:
   - Select and right-click a document in the Document Search Results list, then select **Notes**.
   - From an open OLE document, select **Edit | Notes**.
   - Click on on the Note status bar.
   
   The **Notes** dialog box is displayed.

2. Select the note to be edited from the **Notes** list.

3. Edit the text in the field provided. Right-click for additional text editing options.
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.

Clicking **Close** closes the **Notes** dialog box. The note remains attached to the document; any unsaved changes to note text are discarded.

**Deleting a Note from the Notes Dialog Box**

1. Open the **Notes** dialog box using one of the following methods:
   - Select and right-click a document in the Document Search Results list, then select **Notes**.
   - From an open OLE document, select **Edit | Notes**.
   - Click on on the Note status bar

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.

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.

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.

**Note:** If an Arrow, Ellipse, or Highlight note type is configured to display an icon along with the annotation, the annotation can only be moved by clicking and dragging the icon. If the icon is not displayed, the annotation can be moved by clicking and dragging the annotation itself.
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 222.

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

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Black Redaction" /></td>
<td><strong>Toggle Redaction</strong> 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 select list. You remain in redaction creation mode until you click the <strong>Toggle Redaction</strong> button again. This option is available for image documents only. You must have sufficient privileges to modify the document.</td>
</tr>
<tr>
<td><img src="image" alt="Save Redactions" /></td>
<td><strong>Save Redactions</strong> 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.</td>
</tr>
<tr>
<td><img src="image" alt="Toggle Annotation" /></td>
<td><strong>Toggle Annotation</strong> enables you to add one or more annotations to the document by selecting the annotation(s) from the adjacent drop-down select list of available annotation types. You remain in annotation addition mode until you click the <strong>Toggle Annotation</strong> button again.</td>
</tr>
</tbody>
</table>

**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.
**Note:** Annotations cannot be placed on HTML documents.

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 select list. By default, the drop-down select 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 select 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 225.

   **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 215.

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 option 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 - Viewer Options on page 123.

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.

**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 created and saved on image and text documents whose Document Types are 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 select list. These annotations are supported only in the OnBase Client and should not be used for creating permanent redactions in Core Services applications like the OnBase Desktop or Web Client.

### 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 select 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.

![Black Redaction](image)

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, the redacted document is saved either to another Document Type or as a revision of the current document. Redacted text documents will be saved with an image file format.

**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**.

**Caution:** If you are using EDM Services, clicking Save Markup will also save any redactions you have added to the document.

### Staples

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

Stapled documents are only logically linked. The documents remain separate.

Not all file formats can use staples. See your system administrator to verify whether or not your document can use staples.

### Working with Staples

#### Stapling Documents

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: In order 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.
   - An icon indicating that the document has been stapled is displayed on all associated 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 initial document or the secondary document by labeling the note as **Staple** or **Back Staple**, as shown in the following illustration:

![Staple note illustration](image)

**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.

Viewing Stapled Documents

1. Click the Staple note tab at the bottom of the Document Viewer window. The note window is displayed:

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.
2. Edit or add any text as needed.

**Deleting a Staple**

1. Right-click on the staple status bar and select **Delete Note**.
   
   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.
CUSTOM QUERIES AND TEXT SEARCHING

Along with Document Retrieval, you can locate documents and specific information in OnBase using Custom Queries and External or Internal Text searches.

Document Retrieval Using Custom Queries

Custom queries are queries that have been configured for you by your system administrator, so that you can quickly and easily select the kinds of documents that you most frequently work with.

Whenever you conduct a custom query, its specifications are automatically recorded in a temporary query history, which is maintained for the duration of your current Web Client session. At any later time in the same session, you can conduct the same query by clicking the History button and then selecting the custom query from the list in the resulting Query History page.

Conducting a Custom Query

1. Ensure that you are in the Document context.
   
   Click Document from the context drop-down select list.
2. Mode options can be accessed by clicking the mode drop-down select list.

3. Click **Custom Queries** in the Retrieve mode drop-down select list.
4. The Custom Queries panel displays all available Custom Queries. From the Custom Queries list, select a Custom Query.

5. Depending on its configuration, the Custom Query form is displayed either in the Custom Query panel in the Navigation bar, or in the Document Viewer. Some or all of the fields may be filled in automatically.

   If the custom query form is presented in the Navigation Bar, then the fields are Keyword Type fields, with all the standard features associated with Keyword Types. For example, you can create duplicate Keyword Type fields or use wildcards.

**Note:** When the Document Viewer is set to not display, and you perform a document retrieval using any Search method or by performing a Custom Query, the Document Viewer - including the Search list - will display in a separate window.
6. Complete as much of the form as necessary, by selecting, inserting, or editing the appropriate values. If there are instructions at the top of the query form, be sure to follow them.

   If you enter only a **From Date**, all documents from that date forward will be found
   
   If you enter only a **To Date**, all documents from that date backward will be found
   
   If you enter a **From Date** and a **To Date**, all documents within the date range will be found

**Note:** You can use all functionality of Keyword Type fields in Custom Queries that display in the Navigation Bar, including adding additional instances of a Keyword Type, or using Wildcard or Boolean operators to narrow the search.
For more information, see Working With Keywords on page 132.
7. Click the **Search** button in the **Custom Queries** toolbar or the search button configured on the custom query itself, depending upon how the custom query was configured.
8. Documents that meet the search criteria are displayed in the Document Search Results list. Your system may be configured to automatically display one of the selected documents in the Document Viewer.

<table>
<thead>
<tr>
<th>Document Name (14)</th>
<th>Invoice #</th>
<th>Invoice Amount</th>
<th>Customer Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>AR - Receivable Invoices ...</td>
<td>1005</td>
<td>3500.00</td>
<td>HAMMERS AND NAILS</td>
</tr>
<tr>
<td>AR - Receivable Invoices ...</td>
<td>1006</td>
<td>200.00</td>
<td>HAMMERS AND NAILS</td>
</tr>
<tr>
<td>AR - Receivable Invoices ...</td>
<td>1007</td>
<td>125.00</td>
<td>HAMMERS AND NAILS</td>
</tr>
<tr>
<td>AR - Receivable Invoices ...</td>
<td>1008</td>
<td>15750.00</td>
<td>HAMMERS AND NAILS</td>
</tr>
<tr>
<td>AR - Receivable Invoices ...</td>
<td>1009</td>
<td>77500.00</td>
<td>HAMMERS AND NAILS</td>
</tr>
<tr>
<td>AR - Receivable Invoices ...</td>
<td>1010</td>
<td>1000.00</td>
<td>HAMMERS AND NAILS</td>
</tr>
</tbody>
</table>

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

**Tip**: Click the column header at the top of the list to sort documents by column values. To resize a column to the width of the longest value, double-click the divider to the right of the column name. Column width changes are saved and reflected the next time you use the query.

**Note**: If you sort by the **Document Date** property, the results will be sorted by both the date and the time the document was imported into the system.
Conducting a Custom Query with a Text Search

If your system administrator configured a Custom Query for text searching, you can search for specific text within document types assigned to the Custom Query.

1. Ensure that you are in Document mode.

   Click **Document** from the context drop-down select list.

2. Mode options can be accessed by clicking the mode drop-down select list.

3. Click **Custom Queries** in the Retrieve mode drop-down select list.
4. The Custom Queries panel displays all available Custom Queries. From the **Custom Queries** list, select a Custom Query.

The Custom Query form is displayed in the Navigation Bar. There may or may not be Keyword Type fields, depending on whether the Custom Query is intended solely for text searching.

**Note:** When the Document Viewer is set to not display, and you perform a document retrieval using any Search method or by performing a Custom Query, the Document Viewer - including the Search list - will display in a separate window.
5. Complete as much of the Custom Query as necessary by selecting, inserting, or editing the appropriate values. Follow any additional instructions included at the top of the query form.

If you enter only a From Date, all documents from that date forward will be found.

If you enter only a To Date, all documents from that date backward will be found.

If you enter a From Date and a To Date, all documents between those dates inclusive will be found.

**Note:** You can use all functionality of Keyword Types in Custom Queries that display in the Navigation Bar, including adding additional instances of a Keyword Type, or using Wildcard or Boolean operators to narrow the search.

For more information, see Logical (Boolean) Operators on page 148.

6. Click the **Text** tab in the panel. The external text search options are displayed.

7. In the **Search String** field, type the text string you want to search for. The string must contain at least two characters, and at least one character in the string must be a letter or a number.
8. Select a search type.
   - **Text** - Searches for alphanumerical text.
   - **Number** - Searches for numeric values and allows the use of 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, type **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 alphanumerical 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.

- **Formatted Number** - Searches for numeric values that use formatting characters. For example, to search for all Social Security Numbers greater than 800-00-0000, type > 800-00-0000 in the **Search String** field. You can use this option with following operators to limit your search: =, >, <, =>, and <=. The and, or, and to operators can be used to search for a range of values. For example, type **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.

9. Select one of the following options if necessary:
   - Select the **Case Sensitive** check box to return only matches that have the same capitalization as the text string search criteria.
   - Select the **Whole Word Match** check box to match only a text string that is the exact word (not just merely characters matching the search criteria). If there are any spaces within the text string, the **Whole Word Match** check box will be unavailable.
   - Select the **Wild Card Search** check box to include wild card characters in your text string search criteria.

**Note:** These options are not available for Number and Formatted Number search types.

10. To generate a report of the text search criteria and results, select the **Create Report** check box. Type the name of the report in the **Report Description** field.
11. Click the **Search** button in the toolbar.

OnBase displays a Document Search Results list, which provides a link to each page that contains the text string, as well as the number of instances, or hits, per document.

<table>
<thead>
<tr>
<th># Hits</th>
<th>On Page</th>
<th>Document Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>27</td>
<td>1, 1, 1, 1, 8, 14, 23, 13, 22, 21, 29, 39, 15</td>
<td>Transaction Log Report - Search for Log in MANAGER Date: 12-02-2003</td>
</tr>
</tbody>
</table>

12. Click a page number to display that hit in the Document Viewer. To display the hit in a new window, right-click the page number and select **Open in New Window**.

**Note:** If the selected document is displayed using an image rendition, the hits will not be highlighted on the document. The hits will only be highlighted when the selected document is displayed using a text rendition.

### Viewing Recent Query History

You can use the **Query History** button to display a list of searches performed during the current session (all Custom Query and Document Retrieval searches since logon).

The **Query History** button is available at the bottom of the Web Client Navigation Bar.

1. Click the **Query History** button. The **Query History** dialog box is displayed.
2. To repeat a previous search, select an item from the list.

### Internal Text Search Definition

The Internal Text Search function allows you to locate search text in an open text-based document, including PCL and other plain text documents or ASCII file formats.

See also: External Text Search Definition on page 9.

### Internal Text Search Toolbar
From an open text-based document, use the Internal Text Search toolbar to search for specific text strings within the document.

- You can limit the text string search to one or more consecutive columns (character positions).
- 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.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Icon]</td>
<td><strong>Text Search Options</strong> let you limit 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 from the current page. For more information, see Limiting Searches Using Text Search Options on page 242.</td>
</tr>
<tr>
<td>![Icon]</td>
<td><strong>Find Next</strong> searches for the next following occurrence of the specified string within the current text document.</td>
</tr>
<tr>
<td>![Icon]</td>
<td><strong>Find Previous</strong> searches for the last preceding occurrence of the specified string within the current text document.</td>
</tr>
</tbody>
</table>

**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**.

**Performing an Internal Text Search**

1. Click in the **Search String** field and type the characters to search for.

   Any previously-entered search strings from your current Web session are retained in the drop-down select list located on the Internal Text Search toolbar. You can select a previous string from this list to quickly search the current document for that string.

   If you close the document and re-open it, only the last 25 searches will appear in the drop-down select list.

2. Click **Find Next** to locate the first occurrence of the text.

   **Note:** You can also press **Enter** to initiate the search or to find subsequent occurrences of the text.
3. Click **Find Previous** or press **Shift+Enter** on the keyboard to return to the previous search occurrence.

Any occurrences found in the document will display within a highlight bar. The actual search string will display 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. If you have an idea of where the text string occurs in the document, 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. Depending on how the document was imported, you may also be able to search predefined blocks of text using column indexes. To perform a search using Text Search Options, follow these steps:

1. Click the **Text Search Options** button on the Text Search toolbar. The **Text Search** dialog box is displayed.
2. Select any desired options. See the table below for more details on each option.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search String</td>
<td>Enter your search term in this field.</td>
</tr>
<tr>
<td>Search type</td>
<td><strong>Text</strong> - select this option to search for alphanumeric text.</td>
</tr>
<tr>
<td></td>
<td><strong>Number</strong> - select this option to search for numeric values. This option also allows the use of the following operators to limit the search: =, &gt;, &lt;, &gt;=, and &lt;=. You can use <strong>and</strong>, <strong>or</strong>, and <strong>to</strong> as operators to search for a range of values. For example, type <strong>2008 and 2009</strong> to find documents containing both 2008 and 2009.</td>
</tr>
<tr>
<td></td>
<td><strong>Caution:</strong> 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 <strong>001</strong> and the actual text is <strong>ABC001</strong>, then the value will not be found.</td>
</tr>
<tr>
<td></td>
<td><strong>Formatted Number</strong> - select this option to search for numeric values that use formatting characters. For example, to search for all Social Security Numbers greater than 800-00-0000, type <strong>&gt; 800-00-0000</strong> in the Search String field. You can use this option with following operators to limit your search: =, &gt;, &lt;, &gt;=, and &lt;=. The <strong>and</strong>, <strong>or</strong>, and <strong>to</strong> operators can be used to search for a range of values. For example, type <strong>800-00-000 to 900-00-0000</strong> to find documents containing values within this range.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> 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.</td>
</tr>
<tr>
<td>Wild Card Search</td>
<td>Select the Wild Card Search check box to include wild card characters in your text string search criteria.</td>
</tr>
<tr>
<td>Case Sensitive</td>
<td>Select the Case Sensitive check box to return only matches that have the same capitalization as the text string search criteria.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Whole Word Match</td>
<td>Select the <strong>Whole Word Match</strong> check box to match only a text string that is the exact word (not just merely characters matching the search criteria). If there are any spaces within the text string, the <strong>Whole Word Match</strong> check box will be unavailable.</td>
</tr>
<tr>
<td>Start Search on Current Page</td>
<td>Select <strong>Start Search on Current Page</strong> to begin the search from the current page. If this option is applied and you search using only the <strong>Find Previous</strong> button, the pages that follow the current page are omitted from the search. If you search using only the <strong>Find Next</strong> button, the pages that precede the current page are omitted from the search. Clear this option if you want the search to begin on the first page of the document.</td>
</tr>
</tbody>
</table>
| Column Search                  | **Column Search** - select this check box to search within specified columns.  
                                   **Column Index** - select the column index for the block of text that you want to search from the **Column Index** drop-down select list. The **Column Index** drop-down select list is unavailable if the document has no column indexes.  
                                   **From** - type the character position of the column to start the search in (the left most 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.  
                                   **To** - type the character position of the column to end the search in (the right most column to be searched). The number in the **To** field must be greater than or equal to the number in the **From** field.  
                                   **Note:** Column Index text search or text search using Full-Text Indexing Server for Verity or Full-Text Indexing Server for Microsoft is recommended for business requirements that include searching large documents, in order to realize optimal performance. |

3. Click **Find**. The search will be executed with your selected options. You can also click **Exit** and run the search from the Internal Text Search toolbar. The selected settings remain applied to all internal text string searches for the document displayed, until the settings are changed or disabled, or until the Document Viewer is closed.
## External Text Search Definition

The External Text Search function allows you to search for text across text-based documents of a selected Document Type. Text-based documents include, but are not limited to, all documents with the following formats:

- Text Report Format
- Dynamic Document
- XML
- AFP
- PCL

**Note:** External Text Search is not available for PCL documents in the OnBase Web Client or Desktop.

See also: Internal Text Search Definition on page 10

## Document Retrieval Using External Text Search

If you have sufficient privileges, you can search for specific text in a text-based document assigned to a Document Type or Document Type Group.

**Note:** External Text Search is not available for PCL documents in the OnBase Web Client or Desktop.

1. Ensure that you are in the Document context.
   
   Click **Document** from the context drop-down select list.
2. Mode options can be accessed by clicking the mode drop-down select list.

3. Click **Document Retrieval** from the mode drop-down select list.

4. From the **Document Type Groups** drop-down select list, select the Document Type Group containing the type(s) of document you want to retrieve, or select **All** if you plan to retrieve documents from more than one Document Type Group.

5. From the **Document Types** list, select the Document Type(s) to be included in your search. To select multiple Document Types, use one of the following methods:
   - Press SHIFT or CTRL as you click.
   - Double-click the list to select all documents.
6. Click the **Text** tab in the panel. The external text search options are displayed.

![Search String](image)

7. In the **Search String** field, type the text string you want to search for. The string must contain at least two characters, and at least one character in the string must be a letter or a number.

8. Select a search type.

   - **Text** - Searches for alphanumeric text.
   - **Number** - Searches for numeric values and allows the use of 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, type **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.
• **Formatted Number** - Searches for numeric values that use formatting characters. For example, to search for all Social Security Numbers greater than 800-00-0000, type `> 800-00-0000` in the Search String field. You can use this option with following operators to limit your search: `=`, `>`, `<`, `=>`, and `<=`. The `and`, `or`, and `to` operators can be used to search for a range of values. For example, type `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.

9. Select one of the following options if necessary:

• Select the **Case Sensitive** check box to return only matches that have the same capitalization as the text string search criteria.

• Select the **Whole Word Match** check box to match only a text string that is the exact word (not just merely characters matching the search criteria). If there are any spaces within the text string, the **Whole Word Match** check box will be unavailable.

• Select the **Wild Card Search** check box to include wild card characters in your text string search criteria.

**Note:** These options are not available for Number and Formatted Number search types.

10. To generate a report of the text search criteria and results, select the **Create Report** check box. Type the name of the report in the **Report Description** field.

11. Click the **Search** button in the toolbar.

OnBase displays a Document Search Results list, which provides a link to each page that contains the text string, as well as the number of instances, or hits, per document.

12. Click a page number to display that hit in the Document Viewer. To display the hit in a new window, right-click the page number and select **Open in New Window**.
**Note:** If the selected document is displayed using an image rendition, the hits will not be highlighted on the document. The hits will only be highlighted when the selected document is displayed using a text rendition.

### External Text Search Report

From the Text tab in the Document Retrieval mode, you can create reports of External Text Searches, including the search criteria and results. Reports are saved in the **SYS Search Reports** Document Type, in the **System Documents** Document Type Group.

1. Follow the steps for using Document Retrieval to conduct an External Text Search.
2. To generate a report of the search, select the **Create Report** check box.
3. Type a name for the report in the **Report Description** field. This name will be the **Description Keyword** value by which you can search for the report in Document Retrieval.
4. Upon initiating the search, the report is created and displayed in the Document Viewer. The report is also automatically stored in the **SYS Search Reports** Document Type, in the **System Documents** Document Type Group. Information in the report includes, but is not limited to, the following items:
   - Date the report was generated
   - User that generated the report
   - Number of documents searched
   - Search string criteria
   - Number of occurrences (hits) of the search string
   - Workstation from which the report was generated
   - Names (Auto-Name string) of all documents found that met the search string criteria (Auto-Name)
5. Clear the **Create Report** option and initiate the search again to display the Document Retrieval list with all documents that meet the search criteria.

6. Click a page number link to display that result. Show or hide the Navigation Bar to expand the viewable area.

**Note:** Because the report is a document like any other document in the system, you can retrieve it like through the Document Retrieval Process or by Custom Query. You can also include **SYS Search Reports** documents in a folder system or in your personal envelopes.

---

**Wildcard Characters**

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

**Note:** Depending on your system’s configuration, some alphanumeric Keyword Types may not allow wildcard characters to be used.

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

<table>
<thead>
<tr>
<th>Wildcard</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>*</td>
<td>The * wildcard character can be used to replace one or several characters of a text string. For example, the text string Smith* will find all instances of both Smith and Smithsonian.</td>
</tr>
<tr>
<td>?</td>
<td>The ? wildcard character can be used to replace a single character in the text string. For example, the text string SM?TH will find all instances of both Smith and Smyth.</td>
</tr>
</tbody>
</table>
Note: Wildcard characters cannot be used to replace non-alphanumeric characters in external text searches. For example, a search for it?s will not return it’s.
IMPORTING DOCUMENTS

You can use the Web Client to import individual documents to OnBase.

**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, upload, indexing, re-indexing, viewing/modifying Keyword Values, and scanning.

**Note:** For more information on scanning documents, see the Document Imaging reference guide or help files.

1. Ensure that you are in the Document context.

   Click **Document** from the context drop-down select list.

2. Mode options can be accessed by clicking the mode drop-down select list.
3. Click **Import Document** from the mode drop-down select list.

   ![Import Document Panel]

   The **Import Document** panel is displayed.

4. In the **File Path** field, identify the full file path for the document you are importing. You can either type in the file path, or click the **Browse** button and browse to the file location.

   If OnBase can correlate the file extension to a file type (format), it will automatically select that file type in the **File Type** field. For example, if you import a file whose extension is `.doc`, OnBase will select **Microsoft Word document (.doc)**.

5. Select **Initiate Workflow** to add this new document to Workflow.

**Note:** This check box is only available if your system is licensed for Workflow, the Document Type is part of an existing Life cycle, and the Document Type is not configured to automatically initiate Workflow when a document is imported.
6. From the **Document Type Group** drop-down select list, select the Document Type Group to be assigned to the document by OnBase. (The list includes all Document Type Groups to which you have user import rights. These rights are granted by your system administrator.)

7. From the **Document Type** drop-down select list, select the Document Type to be assigned to the document by OnBase. (The list includes all Document Types to which you have user import rights. These rights are granted by your system administrator.)

When you select a Document Type, OnBase automatically displays fields for Keyword Types that are used to index documents of that type.

8. If OnBase has not selected the file type, select the appropriate type from the **File Type** drop-down list.

**Note:** Documents cannot be imported with a file format of Electronic Form.

9. Select the Document Date. To retain the selected date for future uploads, click the lock button to the right of the calendar. The selected date is retained until you click the lock button again to unlock it.

10. Type Keyword Values in the Keyword Type fields.

    Depending on your system’s configuration, some values may be provided by default. Other Keyword Types may be configured as read-only, preventing you from indexing the document with a value for that Keyword Type. If the Keyword Type name is displayed in red, a Keyword Value is required.

**Note:** If you select a different Document Type, any Keyword Values that were already entered are not retained, even if the new Document Type has the same Keyword Types as the previous one.

**Note:** You can include special characters (such as ñ, à, etc.) in Keyword Values.

11. If you make a mistake, use the following buttons available at the bottom of the **Import Document** panel to clear the current indexing values.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="Image" alt="Clear all" /></td>
<td>Click to clear all Keyword Type fields.</td>
</tr>
</tbody>
</table>
12. Click the **Import** button in the toolbar at the bottom of the panel. The Web Client imports the document to OnBase. If more information is needed to complete the import, a message displays the appropriate instructions.

- You may be presented with additional options if you are importing a rendition of a document. For more information, see Importing Renditions on page 106.

- When the import is complete, the following message is displayed near the top of the panel:

  **Import Succeeded.**

**Note:** Before importing the document, OnBase checks its file size against the maximum size allowed for imports. If the document is too large, you will be notified that the import failed.

**Note:** If you receive an **Upload Failed** message, contact your system administrator.
INDEXING BATCHES

From the Web Client, you can index batches of documents that have been imported into OnBase. Batch import methods include Document Imaging, Document Import Processor (DIP), and Disconnected Scanning, among others.

**Note:** These batch import methods require separate licensing, installation, and configuration. For more information about these modules, refer to each module’s Help files or contact your system administrator.

Accessing the Indexing Panel

The **Indexing** panel lets you view and index batches of documents. If you have appropriate privileges and your system is set up to allow Web Client indexing, then **Indexing** is available from the **Document** context.

**Note:** For more information on scanning documents, see the Document Imaging reference guide or help files.

To open the **Indexing** panel:

1. Select **Document** from the Context drop-down select list.
2. Select **Indexing** from the mode drop-down select list.
Indexing Panel Overview

An **Indexing** panel like the one shown below is displayed during indexing. The documents to index are displayed in a separate Document Viewer window.
The following controls are available when you index a batch:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select a Queue</td>
<td>The <strong>Select a Queue</strong> drop-down list allows you to select the queue(s) that you plan to index. When you select a queue, the batches in that queue are listed to the right. To index a batch, first select it and then right-click and choose <strong>Index Documents</strong>.</td>
</tr>
<tr>
<td>Document Type</td>
<td>The <strong>Document Type</strong> drop-down list allows you to choose the Document Type for the current image. You must select a Document Type from the drop-down before continuing, unless the selected batch has been configured to have a Default Document Type. Users may override the default or previous value to select a different Document Type. Depending on the queue’s configuration, a document may receive the Document Type of the document that was indexed before it as its Default Document Type. When a Document Type is selected, the lower part of the panel populates with the Keyword Values assigned to that Document Type.</td>
</tr>
<tr>
<td>Document Date</td>
<td>Enter the date you want to associate with the document you are indexing in the <strong>Document Date</strong> field. This date is used in the <strong>Document Retrieval</strong> dialog box and other dialog boxes to find the document by date. Click the <strong>Cal</strong> to the right of the <strong>Document Date</strong> field for a selection calendar.</td>
</tr>
<tr>
<td>Keywords</td>
<td>Once the Document Type has been selected, the Keyword Types (names and fields) for that document are displayed. If an ellipsis ( . . . ) follows the Keyword Type field, drop-down selections are available.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
</tr>
<tr>
<td>Lock</td>
<td>The lock next to the <strong>Document Type</strong> field, the <strong>Document Date</strong> field, and each of the Keyword Type fields allows you to lock that field’s current value so that it cannot be changed. When the current page is indexed, the locked field holds the value from the previous document. If the Document Type is changed using the <strong>Document Type</strong> drop-down list, and if a locked Keyword Type field is associated with the new Document Type, the value remains in the Keyword Type field in the new Document Type. To change the value in a locked field, click the lock again and type a new value. <strong>Note:</strong> If a Primary Keyword Value for an AutoFill Keyword Set is locked/unlocked, the Secondary Keyword Values will also be locked/unlocked. <strong>Note:</strong> When using Keyword Value locks, there can be undesired results when changing the Document Type. A different Document Type may share the same Keyword Types, but the Keyword Values can be stored on the second Document Type in a different Keyword Type storage structure. When switching between Keyword Type structures (e.g., a Document Type assigned a Multi-Instance Keyword Type Group (MIKTG) to a Document Type not assigned a MIKTG, and back again,) this may result in the Multi-Instance Keyword Type Group Values being re-ordered in the Indexing panel. This is expected behavior since the alteration of the method of storage from a MIKTG to regular Keyword Type fields cannot retain the relationship information between the values originally imposed with the MIKTG. For this reason, switching between Keyword Type structures is not recommended. <strong>Note:</strong> When you lock the <strong>Document Date</strong> field, the locked date is saved on the user’s workstation and persists until the cookie storing the date is deleted or the date is unlocked.</td>
</tr>
</tbody>
</table>

**Note:** To enter multiple values for the same Keyword Type, double-click the Keyword Type name to create another Keyword Type field. This option is not available if the Document Type that the document is being indexed into is associated with a Keyword Type Group, unless it is a Multi-Instance Keyword Type Group.
Indexing Toolbar Options

The indexing toolbar is located along the bottom of the Indexing panel. The indexing toolbar contains the buttons necessary to navigate among the documents within the batch and to manage the indexing process:

**Note:** In the table, the term 'unindexed document' means any document that was not indexed before you began indexing the current batch or before you last clicked the [Index Documents](#) button.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="#">First Document</a></td>
<td>The <strong>First Document</strong> button displays the first unindexed document in the batch, if it is not already being displayed.</td>
</tr>
<tr>
<td><a href="#">Previous Document</a></td>
<td>The <strong>Previous Document</strong> button displays the previous unindexed document in the batch, if it is not already being displayed.</td>
</tr>
<tr>
<td><a href="#">Next Document</a></td>
<td>The <strong>Next Document</strong> button displays the first page of the next unindexed document in the batch, if there is one.</td>
</tr>
<tr>
<td><a href="#">Last Document</a></td>
<td>The <strong>Last Document</strong> button displays the first page of the last unindexed document in the batch you are indexing.</td>
</tr>
<tr>
<td><a href="#">Index Documents</a></td>
<td>The <strong>Index Documents</strong> button saves all indexing information provided during the current indexing session, or since the last time indexing information was saved. All documents indexed to this point will no longer be available for indexing by this method.</td>
</tr>
<tr>
<td><a href="#">Append Pages</a></td>
<td>The <strong>Append Pages</strong> button appends the current document to the last, previously-indexed document. This option is available only when indexing image documents.</td>
</tr>
</tbody>
</table>
The **Create New Document** button creates a new document from the currently displayed page in the document. For example, if you had a 5-page document, you could elect to create a new document from pages 3-5. To create a new document during indexing, select the page you wish to be the start of your new document (page 3) and click the **Create New Document** button.

**Note:** You cannot create a new document beginning with the first page of the current document.

Depending on your system configuration, you may be prompted with the **Create New Document** dialog box. Select the **Document Type** for the new document and enter the appropriate Keyword Values for the new document and select **OK**. If the **Create New Document** dialog box is not displayed, the newly-created document is displayed for indexing and the document from which it is created is moved to the end of the batch for indexing purposes.

**Note:** Unlike the OnBase Client module, the OnBase Web Client offers no method to create a new document by specifying a page range of an existing document during indexing.

The **Delete Page** button deletes the currently-displayed page from the selected document.

The **Delete Document** button deletes the current document.

**Note:** Depending on your scan queue configuration, you may or may not be able to a delete the current document.
Indexing Batches

To index batches in the Web Client:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Undo Icon" /></td>
<td>The <strong>Undo</strong> button allows you to cancel your last deletion or append operation. To cancel an append, click the <strong>Undo</strong> button immediately after clicking the <strong>Append Pages</strong> button. The Undo option is not available once a new document has been indexed or navigated through.</td>
</tr>
<tr>
<td><img src="image" alt="Clear Keywords Icon" /></td>
<td>The <strong>Clear Keywords</strong> button clears the Keyword Values from their fields. Locked fields are not cleared.</td>
</tr>
<tr>
<td><img src="image" alt="Stop Indexing Icon" /></td>
<td>The <strong>Stop Indexing</strong> button closes the open document, re-displays the list of batches, and discards any indexing information provided since the last time indexing information was saved. All Keyword Value information is removed from the <strong>Indexing</strong> panel and the <strong>Document Type</strong> field is cleared. The same queue remains selected in the <strong>Indexing</strong> panel, but the batch is de-selected in the list.</td>
</tr>
</tbody>
</table>

**Note:** If you delete the last document in a batch, or append the last document, you receive the following message: *You have indexed all documents in the batch and your last action(s) may be undone. Click stop or choose a new batch to complete the indexing process for this batch.*
1. Select **Indexing** from the mode drop-down select list.

The **Indexing** panel is displayed. Indexing begins in the **Awaiting Index** batch status queue, where the documents are placed when they are first brought into the system. Once any documents in a batch have been indexed, the whole batch is moved to the **Index in Progress** batch status queue. Once all the documents have been indexed, the batch is committed, or imported into the system.

Double-blind indexing allows an additional indexer to re-enter index values as a verification step to prevent errors during manual indexing. If your system is configured for double-blind indexing, then there are two additional batch status queues, **Secondary Awaiting Index** and **Secondary Index in Progress**. These queues hold documents that will be re-indexed by the second indexer.

2. Using the **Select a Queue** drop-down, select one of the following batch status queues:

   - **Awaiting Index**. Contains batches with only unindexed documents.
   - **Index in Progress**. Contains batches with some indexed documents and some unindexed documents. These batches have been imported and partially indexed, but are not yet committed.

All the batches with the selected batch status queue are listed. Each listing includes the following information:

   - The name of the queue where the batch is currently located
   - The batch number assigned to the batch
   - The name of the batch (initially defaults to the date the batch was brought into the system and the user name of the user who imported them, but may have been changed by the user)
   - The date and time that the batch was created
   - The number of documents in the batch that have not yet been indexed
3. To see more information about a batch, double-click it. The Select Document window is displayed, listing each of the documents in the batch. Each document listing includes the following information:

- The Document Type
- The primary document identifier for the specific document within the type
- The Keyword Types assigned to the Document Type
- Any Keyword Values which have been provided for the listed Keyword Types

**Note:** Any document which has not yet been at least partially indexed is listed simply as **Unindexed Document**.

4. To view a document, double-click its listing. It is displayed in the Select Document window, below the list of documents residing in the batch.

**Note:** A document cannot be indexed when it is opened this way.

When you are finished viewing and/or editing a document, you can view another document in the batch by selecting its listing. When you are finished examining the documents, close the Select Document window or minimize it by clicking anywhere outside of it.

5. From the list of batches in the selected batch status queue, right-click on the batch you want to index and select **Index Documents**.

This retrieves the batch and opens the Document Viewer, which displays the first unindexed document in the batch. Choosing **Index Documents** also expands the indexing status option selected in Step 2 to show the batch name of the batch to be indexed, and makes two of the navigation buttons in the indexing toolbar available.
6. In the **Document Type** field, select the Document Type for the document.

   This makes the **Document Date** field available for editing, and displays the fields for the Keyword Types associated with the selected Document Type.

   The lock icon next to the **Document Type** field, the **Document Date** field, and each of the Keyword Type fields allows you to lock that field’s current value so that it cannot be changed. When the current page is indexed, the locked field holds the value from the previous document.

   If the Document Type is changed using the **Document Type** drop-down list, and if a locked Keyword Type field is associated with the new Document Type, the value remains in the Keyword Type field in the new Document Type. To change the value in a locked field, click the lock again and type a new value.

   **Note:** If a Primary Keyword Value for an AutoFill Keyword Set is locked/unlocked, the Secondary Keyword Values will also be locked/unlocked.

   **Note:** When using Keyword Value locks, there can be undesired results when changing the Document Type. A different Document Type may share the same Keyword Types, but the Keyword Values can be stored on the second Document Type in a different Keyword Type storage structure. When switching between Keyword Type structures (e.g., a Document Type assigned a Multi-Instance Keyword Type Group (MIKTG) to a Document Type not assigned a MIKTG, and back again,) this may result in the Multi-Instance Keyword Type Group Values being re-ordered in the Indexing panel. This is expected behavior since the alteration of the method of storage from a MIKTG to regular Keyword Type fields cannot retain the relationship information between the values originally imposed with the MIKTG. For this reason, switching between Keyword Type structures is not recommended.

   When you lock the **Document Date** field, the locked date is saved on the user’s workstation and persists until the cookie storing the date is deleted or the date is unlocked.

   **Note:** Steps 7 through 9c are optional. Only enter as much information as you wish.

7. To change the default Document Date, either edit the date manually in the **Document Date** field, or click the adjacent icon and select a different date from the resulting calendar. A Document Date must be in the format **mm/dd/yyyy**. You can omit leading 0s (zeroes) in the day or month, but you must include all four digits in the year.
8. Insert or edit Keyword Values as desired.

   a. If an AutoFill Keyword Set is associated with the selected Document Type, enter a value for the Primary Keyword Type and press Tab (if the Primary Keyword Type is the last field in the Keyword Panel, press Shift+Tab). The Secondary Keyword Values from the Keyword Set are automatically entered into the corresponding fields.

   b. If more than one AutoFill Keyword Set has the same Primary Keyword Value, multiple AutoFill Keyword Sets are displayed in the Select Keyset dialog box after the Primary Keyword Value is entered.

   c. Depending on how your system is configured, you may be allowed to choose one or more of the AutoFill Keyword Sets. If you are permitted to select only one set, the values of your selected set are displayed in the indexing fields. If you are permitted to select multiple AutoFill Keyword Sets, the document is indexed with values from all selected AutoFill Keyword Sets. Values not common to all sets are displayed at the end of the Keyword Type fields. For example, if two loan documents have the same values for loan number, last name, and address, but a different value for first name, then the additional first name value is displayed in the last Keyword Type field.

   d. Depending on your system configuration and/or the other modules licensed, one or more Keyword Type fields may be displayed as read-only and/or existing Keyword Values may be displayed as masked values.
9. When you are satisfied with the indexing information, click the **Next Document** button in the indexing toolbar. This adds your indexing information to the document, and opens the next unindexed document in the batch.

The system automatically skips all previously indexed documents throughout this procedure. For example, if you index a batch with 30 documents, but only the 14th and 22nd documents have not yet been indexed, those two will be the only documents in the batch that you can access using this method. While you have the 14th document open, therefore, only the **Next Document** button and the **Last Document** button are available for navigation, and they both take you to the 22nd document. Conversely, while you have the 22nd document open, only the **Previous Document** button and the **First Document** button are available for navigation, and they both take you to the 14th document.

**Tip:** The action specification pane keeps the same indexing information until you select a new Document Type. This can speed up the indexing of a batch when some of its documents have the same Document Type and perhaps the same values for some Keyword Types.

**Note:** Repeat Steps 7 and 8 to index the remaining documents in the batch.

10. When you have finished indexing the batch, click the **Index Documents** button in the indexing toolbar. The system saves the batch to the queue that you retrieved them from.

You can also click the **Index Documents** button when you want to take a break, or whenever there is any other reason to save the indexing you have done so far. However, saving your indexing always saves the batch, so you will need to start over again from Step 2.

**Note:** When the batch is saved, the system may change its indexing status. For instance, if you index a few of the documents in an **Awaiting Index** batch and then save the batch, the system changes its status to **Index In Progress**.
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, upload, indexing, re-indexing, viewing/modifying Keyword Values, and scanning.

Re-ordering Pages

You can re-order scanned pages by right-clicking a thumbnail and dragging it until a red line appears where you want the page to be repositioned.

Double-Blind Indexing

Your Web Client may be configured to use double-blind indexing to help eliminate indexing errors. In double-blind indexing, one user (the primary indexer) indexes documents in any batch whose status is either **Awaiting Index** or **Index in Progress**. When the primary indexer finishes indexing the batch, its status changes to either **Secondary Awaiting Index** or **Secondary Index in Progress**. Later, another user (the secondary indexer) independently indexes the same batch, providing Keyword Values without any knowledge of those provided by the primary indexer. Whenever the secondary indexer instructs the system to index a document, the system compares the new Keyword Values with the existing ones, and notifies the secondary indexer of any discrepancies. The secondary indexer can resolve the discrepancies.

Note: To change the batch status to either **Secondary Awaiting Index** or **Secondary Index in Progress**, the primary indexer must index the entire batch.

Note: The secondary indexer cannot change the Document Type or the Document Date.
Double-blind indexing can identify two kinds of discrepancies:

- Different values for the same Keyword Type (e.g., Ulysses Grannt vs. Ulysses Grant)
- Different numbers of values for the same Keyword Type (e.g., Ulysses Grant vs. both Ulysses Grant and Robert Lee)

Normally, the secondary indexer should click the Index Documents button after indexing each document, so that the document is still open for reference.

The following example shows what the discrepancy notification looks like if one of the Keyword Values is different:

The secondary indexer can click Cancel to return to the Indexing panel and edit Keyword Values manually and then resubmit the document. Alternatively, the secondary indexer can select one of the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change the value to:</td>
<td>Changes the value to match the value entered by the primary indexer.</td>
</tr>
</tbody>
</table>
A separate **Indexing** dialog box is displayed for each discrepancy. As soon as the last discrepancy is resolved, the document is automatically imported into the system. The Document Viewer is closed and the Keyword Type fields in the **Indexing** panel are cleared.

### Double-Blind Indexing with Multi-Instance Keyword Type Groups

Your system can be set up to perform double-blind indexing of documents with Multi-Instance Keyword Type Groups. When a discrepancy occurs in indexing such a document, the system displays a dialog box that lists all of the Keyword Values entered by the primary indexer next to all of the Keyword Values entered by the secondary indexer. This not only enables the secondary indexer can compare all values at the same time, but also makes it much easier to identify the relationships among Keyword Types.

### Deleting Batches

To delete a batch, right click on one or more batches and choose **Purge Selected**. Deleting all documents in a batch in the **Awaiting Index** queue will also delete the batch.

**Note**: Depending on your rights/privileges, you may or may not be able to delete a batch.
**Does Not Exist in the Database**

Upon indexing documents, if you get the following message, OnBase is telling you that you must select a pre-configured Keyword Value from the Data Set in the drop-down select list.

*Document Type Name*: [user typed value] *does not exist in the database!*

To successfully index the document, click **OK** and then select a pre-configured Keyword Value from the Data Set in the drop-down select list.
PRINTING

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

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.
   Note: If you are using Microsoft Office 2003, you will be unable to use this option to print documents that use Office Open XML file formats (for example: .docx, .xlxs, .pptx).

   To print these documents, you should open the document first and then select Print.

   • From an open document, click the Print toolbar button.
   • From an open OLE document, select Document | Print.

   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.
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Print Queue</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Note:</strong></td>
<td>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 280.</td>
</tr>
<tr>
<td><strong>Print Format</strong></td>
<td>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 &lt;Default&gt;. To override the print format defaults, change the settings in the print dialog box.</td>
</tr>
<tr>
<td><strong>Orientation</strong></td>
<td><strong>Portrait:</strong> Prints the top of the page on the shortest side of the paper. <strong>Landscape:</strong> Prints the top of the page on the longest side of the paper.</td>
</tr>
<tr>
<td><strong>Print Overlay</strong></td>
<td><strong>No Overlay:</strong> Prints the document without the associated overlay. <strong>Overlay:</strong> 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. <strong>Fax Compatible:</strong> 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.</td>
</tr>
<tr>
<td><strong>Note:</strong></td>
<td>Selecting Fax Compatible forces documents to print in black and white. If you have a color overlay applied to your document, this option may make your document unreadable.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Print Range</strong></td>
<td></td>
</tr>
<tr>
<td>All</td>
<td>Prints all pages of the document(s).</td>
</tr>
<tr>
<td><strong>Note:</strong></td>
<td>The All Print Range option is the only option available when printing PDF documents.</td>
</tr>
<tr>
<td>Current Page</td>
<td>Prints the current page.</td>
</tr>
<tr>
<td>Selected</td>
<td>(Currently not available)</td>
</tr>
<tr>
<td>Page</td>
<td>Prints a range of pages in the document.</td>
</tr>
<tr>
<td><strong>Note:</strong></td>
<td>If you enter a complex range into this field, the pages will be printed in the appropriate order. For example, you could enter 5, 1-3, 9. In this case, 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.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Job Settings</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Copies</td>
<td>Enter the number of copies to print.</td>
</tr>
<tr>
<td>Single Print Job</td>
<td>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.</td>
</tr>
<tr>
<td><strong>Note:</strong></td>
<td>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.</td>
</tr>
<tr>
<td>Continuous Flow</td>
<td>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.</td>
</tr>
<tr>
<td>Example</td>
<td>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.</td>
</tr>
</tbody>
</table>
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 hitlist (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.

**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:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clipboard</td>
<td>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.</td>
</tr>
</tbody>
</table>
| Create New Document | Available for image documents only, this option creates a new OnBase document from the selected area. After you select this option, the Archive Documents 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. |
| Printer          | Prints the selected area. If you select this option, the Print dialog is displayed. Select the desired settings and click OK. The Confirm dialog box displays the following message: **Do you want the zoom region resized to fit the printed page width?**  
  • Select Yes to resize the selected area to the fit the width of the printed page.  
  • Select No to print the selected area in its true size.  
  • Select Cancel to exit without printing. |
Sending Documents to Print Queues in the HTML Web Client

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

**Note:** This option is only available in the HTML Web Client.

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

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

3. Click **Submit Request**.
# Print Queue Dialog Box Options

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

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Print Queue</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Print Format</strong></td>
<td>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 <strong>&lt;Default&gt;</strong>. To override the print format defaults, change the settings in the print dialog box.</td>
</tr>
</tbody>
</table>
| **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. |
| **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. |
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overlay Options/Print</td>
<td><strong>Print Overlay</strong>: 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.</td>
</tr>
<tr>
<td>Overlay</td>
<td><strong>Fax Compatible</strong>: 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.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: Selecting Fax Compatible forces documents to print in black and white. Selecting this option forces documents to print in black and white. If you have a color overlay applied to your document, this option may make your document unreadable.</td>
</tr>
<tr>
<td>Job Settings</td>
<td><strong>Copies</strong>: Enter the number of copies to print.</td>
</tr>
<tr>
<td></td>
<td><strong>Single Print Job</strong>: 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.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: 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.</td>
</tr>
<tr>
<td></td>
<td><strong>Continuous Flow</strong>: 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.</td>
</tr>
<tr>
<td></td>
<td><strong>Example</strong>: 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.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>Continuous Flow cannot be used to control the format of PCL documents in a multi-image layout.</td>
</tr>
<tr>
<td>Revision Options/Print</td>
<td><strong>All Revisions</strong>: Prints all document revisions that you have permission to view.</td>
</tr>
<tr>
<td>Revision</td>
<td><strong>Current Revision</strong>: Prints the most current document revision that you have permission to view.</td>
</tr>
<tr>
<td>Revision</td>
<td></td>
</tr>
</tbody>
</table>

©2011 Hyland Software, Inc.
File Format not Supported for Printing

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

Creating List Reports

If you have the appropriate user rights, you can create a list report of selected documents or all documents in a Document Search Results list or envelope. A list report lists the Auto-Names assigned to the documents, as well as the total number of documents included in the report. The report also identifies the date and time of report creation and the user name of the report's creator. You can display this report in its own Web page for temporary viewing, store it in OnBase for future retrieval, or export it to a Microsoft® Excel® file for additional analysis.

The following example illustrates a list report that has been stored in OnBase.

<table>
<thead>
<tr>
<th>LSTRPT055PAGE: 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Results Title: AP - Purchase Orders</td>
</tr>
<tr>
<td>Report Summary:</td>
</tr>
<tr>
<td>Q1 Vendor PCS</td>
</tr>
<tr>
<td>P.O.# 656 for COMPUTERS ARE US in the amount of $3,775.00, dated 01/07/2008</td>
</tr>
<tr>
<td>P.O.# 660 for OFFICE SUPPLY WAREHOUSE in the amount of $206.65, dated 01/07/2008</td>
</tr>
<tr>
<td>P.O.# 662 for PHONE SHACK in the amount of $3,210.00, dated 01/07/2008</td>
</tr>
<tr>
<td>P.O.# 676 for TAP-IT BUTTONS, INC in the amount of $1,183.00, dated 01/07/2008</td>
</tr>
<tr>
<td>P.O.# 765 for COMPUTERS ARE US in the amount of $504.40, dated 02/04/2008</td>
</tr>
<tr>
<td>P.O.# 767 for OFFICE SUPPLY WAREHOUSE in the amount of $284.60, dated 02/04/2008</td>
</tr>
<tr>
<td>P.O.# 779 for PHONE SHACK in the amount of $3,000.00, dated 02/04/2008</td>
</tr>
<tr>
<td>P.O.# 797 for TAP-IT BUTTONS, INC in the amount of $600.00, dated 02/04/2008</td>
</tr>
<tr>
<td>P.O.# 881 for COMPUTERS ARE US in the amount of $800.00, dated 03/03/2008</td>
</tr>
<tr>
<td>P.O.# 885 for OFFICE SUPPLY WAREHOUSE in the amount of $261.14, dated 03/03/2008</td>
</tr>
<tr>
<td>P.O.# 888 for PHONE SHACK in the amount of $1,110.00, dated 03/03/2008</td>
</tr>
<tr>
<td>P.O.# 898 for TAP-IT BUTTONS, INC in the amount of $1,512.50, dated 03/07/2008</td>
</tr>
<tr>
<td>Total Documents : 12</td>
</tr>
<tr>
<td>Total Processing Time : 0 Hours, 0 Minutes, 1 Seconds</td>
</tr>
</tbody>
</table>

1. Select one or more documents from the Document Search Results list. If you do not select any documents, the list report will automatically list all of the documents in the Document Search Results list.

**Note:** You can select documents only from the current page of the Document Search Results list. CTRL-clicking and SHIFT-clicking do not carry from one page to another. If you need to display more results on one page, increase the results per page setting in the Document Search Results list options.
2. Right-click and select **Create List Report**. The **List Report Options** dialog box is displayed:

3. From the **Range** options, select **All Items** or **Selected Items**:
   - Select **All Items** to include every document in the Document Search Results list in the list report.
   - Select **Selected Items** to include only the selected document(s).

**Note:** If you did not select any documents in the Document Search Results list, the **Selected Items** option is unavailable.

4. Under **Report Destination**, select one of the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display on Screen</td>
<td>Displays the list report in the View List Report window without saving it to OnBase.</td>
</tr>
</tbody>
</table>
5. Page headers identify the date and time that the report was created and the user who created it. To remove page headers from the report, clear the **Generate Page Headers** check box. If this option is selected, the page headers will be displayed on every page of the report.

6. Summary information is the total number of documents in the list report and the amount of time required (hours, minutes, and seconds) to create the report. It is typically displayed at the end of the report. To omit summary information from the report, clear the **Generate Summary Info** check box.

7. To provide your own summary information about the report, type a description in the **Report Summary** field.

   If you are storing the report as a document in OnBase, limit the description to 100 characters. The **Report Summary** field accepts more than 100 characters, but only 100 characters are displayed on the document stored in OnBase.

8. Click **Create**. The system creates the list report and displays it according to the selected **Report Destination**.

   If you selected **Export to Excel**, you may be prompted to open or save the report file. Click **Open** to display the file in Microsoft Excel, or click **Save** to save the file to a local hard drive or network share.
External Text Search Report

From the Text tab in the Document Retrieval mode, you can create reports of External Text Searches, including the search criteria and results. Reports are saved in the SYS Search Reports Document Type, in the System Documents Document Type Group.

1. Follow the steps for using Document Retrieval to conduct an External Text Search.
2. To generate a report of the search, select the Create Report check box.
3. Type a name for the report in the Report Description field. This name will be the Description Keyword value by which you can search for the report in Document Retrieval.
4. Upon initiating the search, the report is created and displayed in the Document Viewer. The report is also automatically stored in the SYS Search Reports Document Type, in the System Documents Document Type Group. Information in the report includes, but is not limited to, the following items:
   - Date the report was generated
   - User that generated the report
   - Number of documents searched
   - Search string criteria
   - Number of occurrences (hits) of the search string
   - Workstation from which the report was generated
   - Names (Auto-Name string) of all documents found that met the search string criteria (Auto-Name)
5. Clear the **Create Report** option and initiate the search again to display the Document Retrieval list with all documents that meet the search criteria.

6. Click a page number link to display that result. Show or hide the Navigation Bar to expand the viewable area.

**Note:** Because the report is a document like any other document in the system, you can retrieve it like through the Document Retrieval Process or by Custom Query. You can also include **SYS Search Reports** documents in a folder system or in your personal envelopes.
OVERVIEW

The Core Services Office Add-In embeds OnBase options within Microsoft Word and Excel documents viewed from the Web Client. With the Office Add-In, you can retrieve cross-references from, add notes to, re-index, and modify Word and Excel documents within the Web Client. You must have the Office Add-In installed to save modified Word or Excel documents using the Save button in the Word or Excel toolbar.

To use the Office Add-In:

- You must have appropriate privileges to use Office Add-In functionality.
- The Office Add-In must be installed on your workstation. For installation information, see the Web Server reference manual.

The Office Add-In is compatible with Microsoft Office versions XP and 2003. The Core Services Office Add-In is supported in OnBase 11.0.0. However, it is recommended that one of the version-specific Office Business Applications be used instead of the Core Services Office Add-In.

Note: Microsoft PowerPoint is currently not supported by the Office Add-In.

Core Services Office Add-In Support in OnBase 11.0.0

The Core Services Office Add-In, which was available in previous versions of OnBase, is supported in OnBase 11.0.0 for use with Microsoft Office XP and 2003. As of OnBase 11.0.0, it is no longer supported for use with Microsoft Office 2007.

Beginning in OnBase 10.0.0, Hyland Software has introduced Office Business Applications that are specific to versions of Office. The following Office integrations are available in OnBase 11.0.0:

<table>
<thead>
<tr>
<th>Microsoft Office</th>
<th>Available Integration(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>XP</td>
<td>Core Services Office Add-In</td>
</tr>
</tbody>
</table>
On workstations that have the Office Add-In installed, Microsoft Excel documents are displayed differently than on workstations where the Office Add-In is not installed. Excel documents are displayed in a separate instance of Excel outside of the Web Client, instead of inside the Web Client viewer.

When Excel and Word documents are displayed in their native applications, the Auto-Name and number of notes attached to the document are displayed in the title bar.

**Note:** An EDM Services license is required for saving documents as revisions and for accessing Office Add-In functionality in Office applications outside the Web Client. For more information, see the EDM Services reference manual.

### Usage

The following sections will guide you through the following tasks for Office documents accessed from the Web Client:

- Modifying a Non-Revisable Document
- Re-Indexing a Document into OnBase
- Adding Notes to a Document with the Office Add-In
- Searching Cross-References with the Office Add-In

**Note:** The OnBase Office toolbar is unavailable for Excel 2007 documents if they have been opened from the OnBase Web Client on workstations with the compatibility pack installed.
Modifying a Non-Revisable Document

When you save changes to a Word or Excel document using the Office Add-In, you are prompted to import the modified document as a new document.

1. Click the **Save** button.
   
The **Import to OnBase** dialog box is displayed.

2. Index the modified document appropriately.

3. Click **Import**.
   
The modified document is saved as a new document while the original document remains in OnBase unchanged.
Re-Indexing a Document into OnBase

You can use the Office Add-In to re-index Word or Excel documents residing in OnBase.

1. Open a Word or Excel document residing in OnBase.
2. Click Re-Index in the Microsoft Word or Excel toolbar. The Re-Index Document dialog box is displayed.

3. Add or change any necessary information.
4. Click **Re-Index**. The document has been re-indexed into OnBase.

**Adding Notes to a Document with the Office Add-In**

You can add notes to Word and Excel documents residing in OnBase using the Office Add-In. When the document is open in Word or Excel, the number of notes attached to the document is reflected in the title bar.

To add a note to a document:

1. Click **Notes** in the Microsoft Word or Excel toolbar.

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

   ![Document Notes dialog box](image)

   2. Select a note to view any associated text.
Adding Notes

1. Click 📄 Notes in the Microsoft Word or Excel toolbar.

2. Click Add New Note and select a Note Type from the list.

3. Add text to the default text in the Note Text text box.

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

1. Click Notes in the Microsoft Word or Excel toolbar.

2. The Notes dialog box is displayed.

3. Select the note to be edited from the Notes list.

4. Changes to the text can be made in the Note Text text box using the following right-click options:
   - **Undo** - Select to undo the last typed action.
   - **Cut** - Select to remove selected text and place it on the clipboard.
   - **Copy** - Select to retain selected text and place it on the clipboard.
   - **Paste** - Select to insert clipboard text in to the active area (last place the mouse was clicked).
Delete - Select to delete selected text.
Select All - Select to select all text (including default note text).

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

Deleting Notes

1. Click Notes in the Microsoft Word or Excel toolbar.

2. The Notes dialog box is displayed.
3. Select the note to be edited from the Notes list.
4. Click Delete Note. A confirmation message is displayed.
5. Click **Yes** to delete the note.

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

**Searching Cross-References with the Office Add-In**

If a document is cross-referenced to other documents in OnBase, you may retrieve those cross-references with the Office Add-In.

To retrieve a cross-reference:

1. Click **Cross-Reference** in the Microsoft Word or Excel toolbar.

   The **Document Cross Reference** dialog is displayed.

2. Select a cross-reference from the **Document Cross Reference** window. The document is displayed either in the Document Viewer below the list or in a new window.
ONBASE USAGE BEST PRACTICES

It is recommended that the following best practice information be reviewed before using OnBase.

The following best practice recommendations have been 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.

DOCUMENT RETRIEVAL

Dates
It is considered a best practice to select a document date or range of document dates from the Dates panel when retrieving documents. Selecting a document date or range of document dates expedites document retrieval.

Drop-Down Lists
When a Keyword Type is configured with a drop-down list, it is considered a best practice to type any known characters in the Keyword Value field before clicking the drop-down list icon. OnBase automatically appends a wildcard to the end of the string of known characters, and filters the available values from the drop-down list accordingly.

Wildcards
Wildcard searches impose extensive database load, and can negatively impact other users. Wildcard searches often generate a Document Search Results list that is much larger than necessary, and is not useful.
To ensure high database performance and execute queries more efficiently, the following are considered best practices for using wildcards when searching:

- Only use leading wildcards in searches when attempting to retrieve documents with complex or misspelled Keyword Values.
- Provide as many known characters as possible before using a wildcard, preferably four or more.

**IMPORTING**

**Text Documents**

To ensure correct functionality for all text documents, it is considered a best practice to remove all Tab characters from text documents before importing them into OnBase. Tab characters that are not removed are converted to spaces when imported into OnBase.

**INDEXING**

**Multi-Instance Keyword Type Groups**

When duplicating a Multi-Instance Keyword Type Group, it is considered a best practice to index all Keyword Values in the Multi-Instance Keyword Type Group, even if only one Keyword Value is different between the original Multi-Instance Keyword Type Group and the duplicate Multi-Instance Keyword Type Group.