

# OnBase<sup>®</sup>

*a Hyland Software solution*

## OnBase Quick Reference Guide

### Web Client Retrieval

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## Table of Contents

Disclaimer .....	ii
Document Attributes .....	Error! Bookmark not defined.
Table of Contents.....	iii
<b>1. Before Beginning .....</b>	<b>5</b>
<b>2. Starting OnBase .....</b>	<b>8</b>
<b>3. Document Retrieval by Document Type.....</b>	<b>9</b>
<b>4. Document Retrieval by Keywords.....</b>	<b>12</b>
<b>5. Keyword Operators and Wildcards .....</b>	<b>13</b>
<b>6. Document Retrieval by Date Range .....</b>	<b>15</b>
<b>7. Document Retrieval by Cross Reference .....</b>	<b>17</b>
<b>8. Document Retrieval by Custom Query.....</b>	<b>19</b>
<b>9. The Right-click Menu .....</b>	<b>21</b>
Toolbars .....	21
Keywords.....	22
Properties.....	22
History.....	22
Print.....	23
Send To.....	25
Notes.....	25
Workflow .....	28
Used to perform Workflow tasks (if applicable).....	28
Re-Index .....	28
Show Folder Locations .....	28
Shows in which folder(s) this document resides (if applicable) .....	28
Navigate .....	29
Scale .....	29
Process .....	30

---

<b>10. Annotations.....</b>	<b>31</b>
Highlights .....	31
Arrows.....	32
Overlap Text.....	32
Ellipses.....	33
Deleting Annotations .....	34
<b>11. Internal Mail.....</b>	<b>36</b>
Sending Internal Mail .....	36
Retrieving Internal Mail .....	37
<b>12. Shortcut Keys.....</b>	<b>Error! Bookmark not defined.</b>
<b>13. Java Client .....</b>	<b>Error! Bookmark not defined.</b>

## 1. Before Beginning

Internet Explorer security settings must be configured properly for access to OnBase

**NOTE:** These settings may already have been configured by your system administrator

.....  
**Open Internet Explorer**

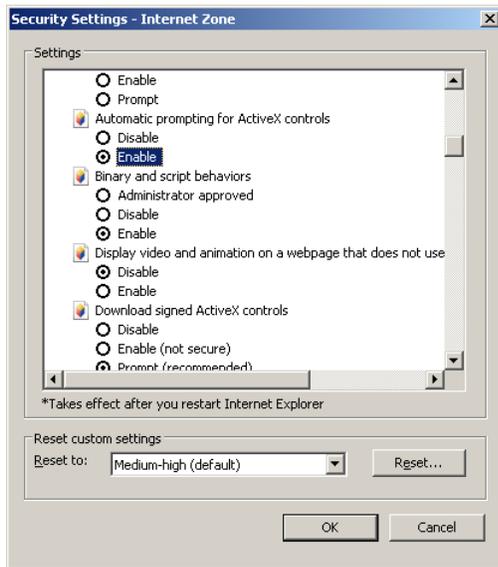
.....  
**Tools | Internet Options | Security [tab]**

.....  
**Choose the Trusted Sites zone**

.....  
**Click the Custom level... button**

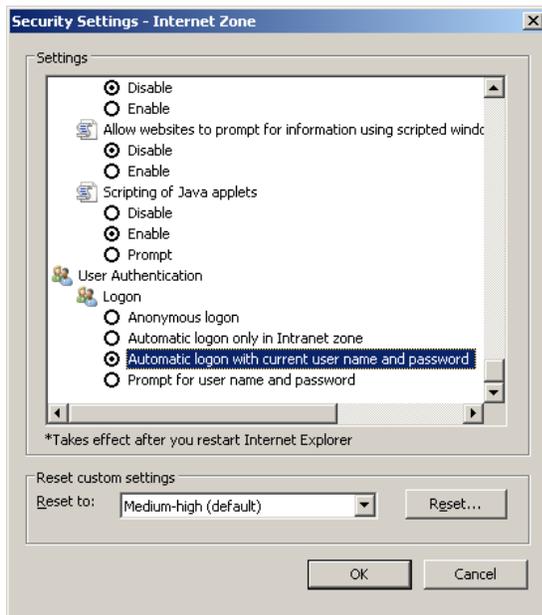


.....  
**Set Automatic prompting for ActiveX controls to Enable**



.....

**Set the logon method to Automatic logon with current user name and password (if using NT Authentication)**



.....

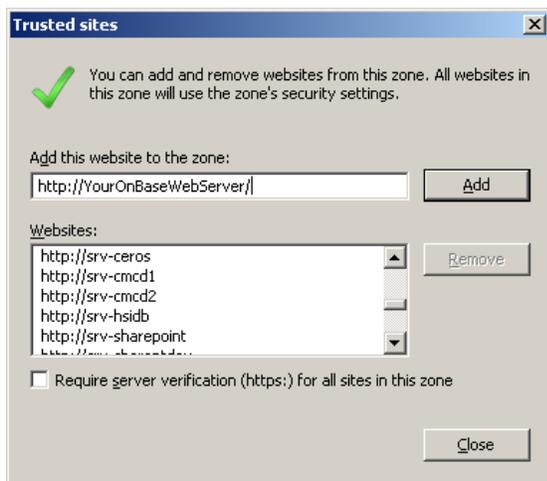
**Click the Security tab**

.....

**Click the Sites button**

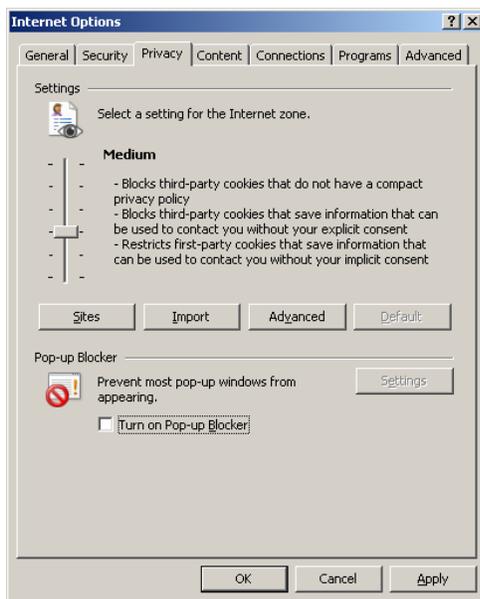
.....

**Add the OnBase Web Client URL to the Trusted Sites zone**



Click the Privacy tab

Uncheck Turn on Pop-up Blocker (or click Settings to whitelist the OnBase web server)



Disable any third-party pop-up blockers (Google Toolbar, Yahoo Toolbar, etc)

## 2. Starting OnBase

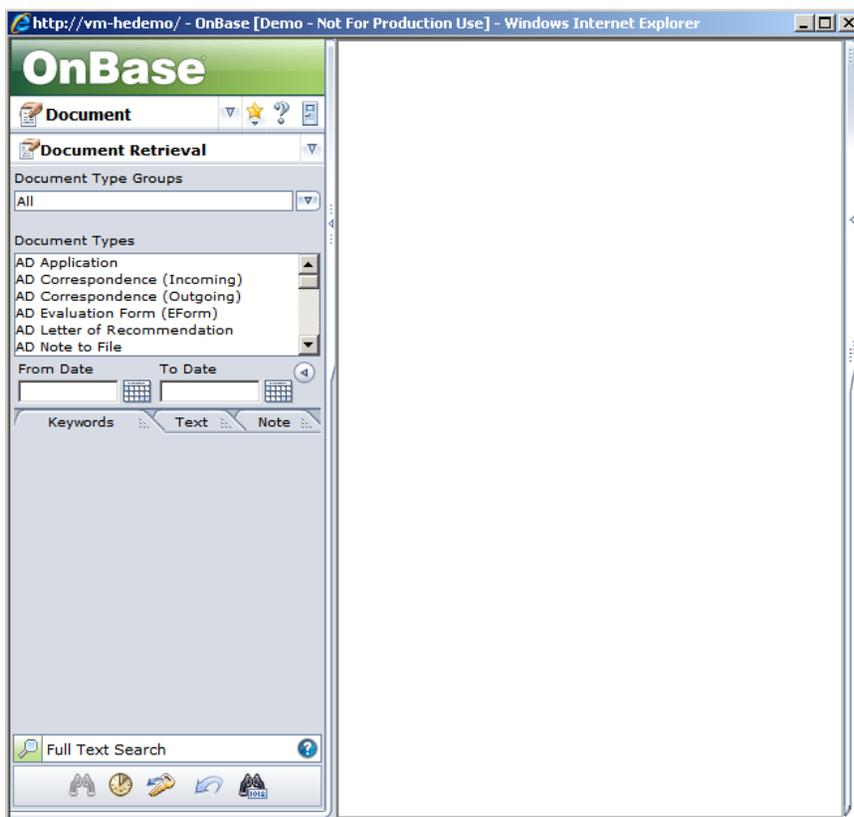
To login to OnBase:

.....  
**Browse to the website address (URL) for your web browser:**

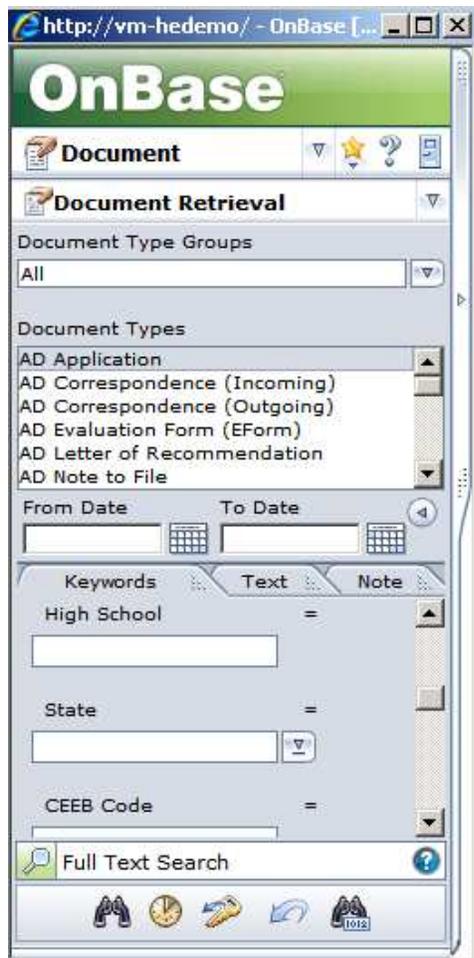
Internet Explorer: \_\_\_\_\_

Other Browsers: \_\_\_\_\_  
.....

Once you have successfully logged into the system, the following Retrieval screen will be displayed for you. This screen will allow you to search by Document Type, Keywords, Dates or a combination of these options.



### 3. Document Retrieval by Document Type



**Document Type Groups** – Allow user to narrow document search by Document Type Group or department

**Document Types** – Allow user to narrow document search by Document Type. Once a Document Type is selected, the Keywords will be available. As more Document Types are selected, the list of keyword types in the Keywords section will be limited only to those Keywords that all the selected Document Types have in common

**Dates** – Allow user to define specific date or range of dates based on the document date of the document. The desired months can be selected from the list box and will automatically be entered in the *From* and *To* fields

**Keywords** – Allow user to enter specific *Keywords* to narrow document searches. The Keyword edit fields will change depending on the *Document Type* selected

**Text** – Opens an additional dialog box that allows you to conduct a more specialized search

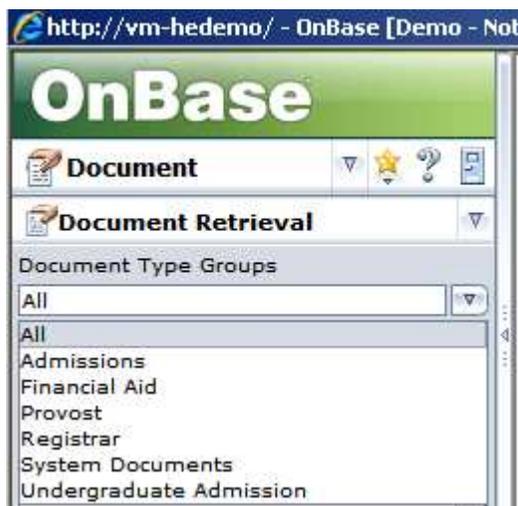
**Note** – Opens an additional dialog box that allows you to search for a specific note type

	Executes a search using the information configured in the Retrieval Screen
	Displays history of recently used Queries
	Clears only the information entered in the Keyword edit fields
	Clears all highlighted information and information in edit fields, including dates
	Executes a search by Document Handle

To retrieve **all** documents in the system under a particular Document Type:

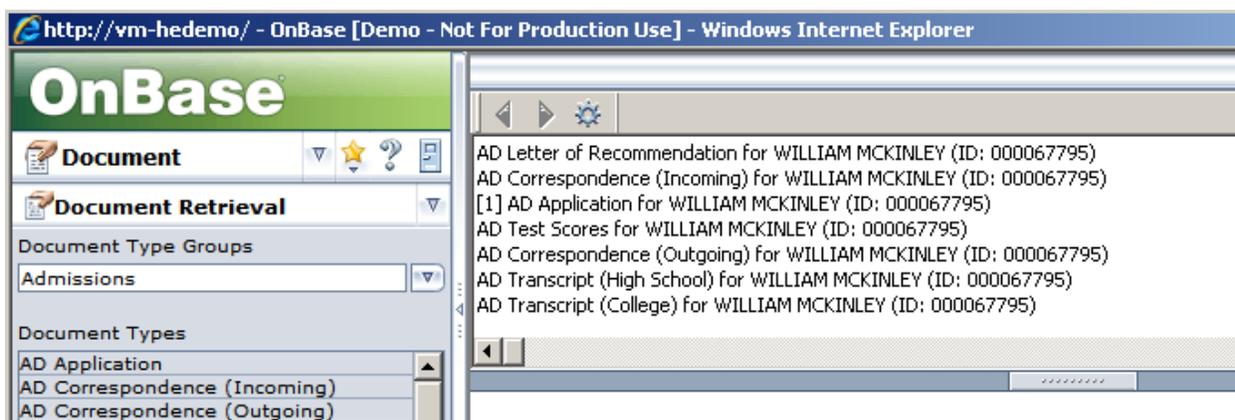
**NOTE:** This type of blind search is only possible under certain configurations, as it may inhibit system performance for other users by putting a strain on the database.

**Select a Document Type Group.** You will now see a list of Document Types for the selected Document Type Group.



**Select the Document Type(s) to retrieve**

**Click the Search icon**  to execute the search. The **Document Search Results** window will display in the upper right-hand window.



**Double-click on a document** in the results hit list that you wish to view. The document will be displayed below the **Document Search Results** window.

The screenshot shows a web browser window displaying a document viewer. At the top, a list of documents is shown, with 'AD Application for WILLIAM MCKINLEY (ID: 000067795)' selected. Below the list is a toolbar with various icons and a 'Fit Width' dropdown. The main content area displays a form titled 'Application For Admission'. The form includes a logo on the left and the title on the right. Below the title is a section for 'Applicant Information' with fields for Last Name, First Name, Middle Initial, Address, City, State, and Zip Code. The fields are populated with handwritten text: 'McKinley', 'William', 'Middle Initial', '350 Fairlady Street', 'Westlake', 'OH', and '44145'. There are also some faint, partially obscured text elements at the bottom of the form.

AD Letter of Recommendation for WILLIAM MCKINLEY (ID: 000067795)  
AD Correspondence (Incoming) for WILLIAM MCKINLEY (ID: 000067795)  
**AD Application for WILLIAM MCKINLEY (ID: 000067795)**  
AD Test Scores for WILLIAM MCKINLEY (ID: 000067795)  
AD Correspondence (Outgoing) for WILLIAM MCKINLEY (ID: 000067795)  
AD Transcript (High School) for WILLIAM MCKINLEY (ID: 000067795)  
AD Transcript (College) for WILLIAM MCKINLEY (ID: 000067795)

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1 / 2 Fit Width

# Application

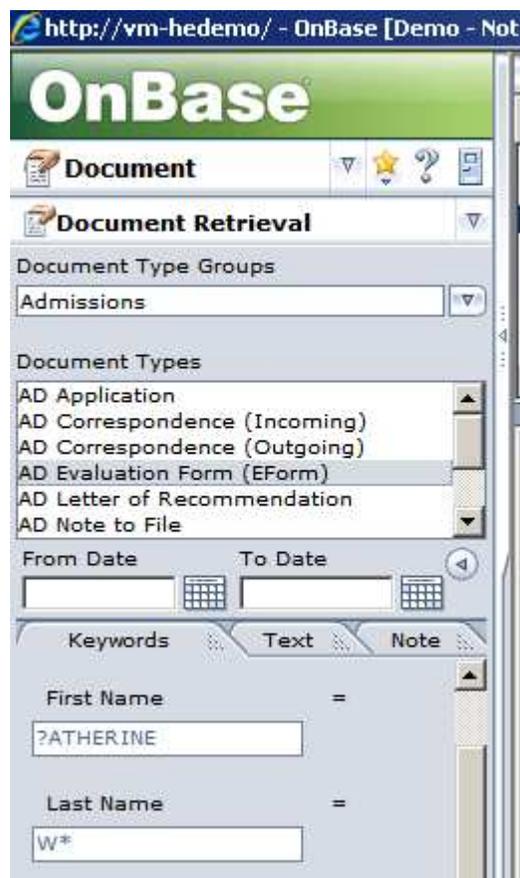
For Admission

## Applicant Information

<i>McKinley</i>	<i>William</i>		
Last Name	First Name	Middle Initial	
<i>350 Fairlady Street</i>	<i>Westlake</i>	<i>OH</i>	<i>44145</i>
Address	City	State	Zip Code
<i>( 216 ) 444 5555</i>	<i>( 216 ) 555 4444</i>		

## 4. Document Retrieval by Keywords

A Keyword is an identifying piece of information used to locate documents stored within the electronic document imaging system.



To retrieve documents by keyword values:

.....

### Select a Document Type Group

.....

### Select the Document Type(s) to retrieve

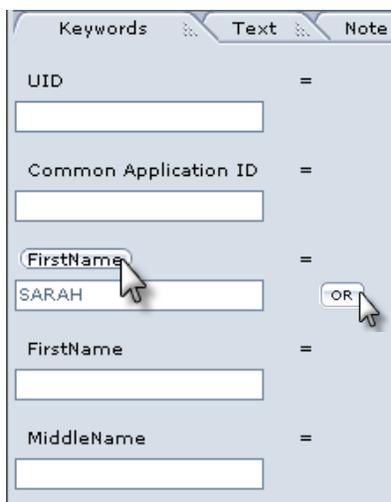
**NOTE:** If multiple Document Types are selected, only the common Keyword Types for those Document Types appear.

.....

**Enter a keyword value** into one or more fields. The more information entered the more specific the search will be.

Click the Search icon  to execute the search. All of the documents in OnBase for the selected Document Type that have the keyword value(s) indicated are displayed in the Document Search Results window.

Double-click on any of the documents to view them.

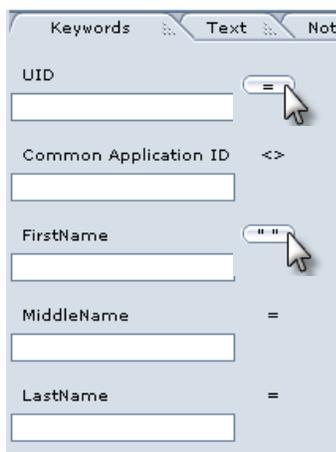


The screenshot shows a search interface with a 'Keywords' tab selected. There are five search fields, each with an equals sign (=) to its right. The first field is 'UID'. The second is 'Common Application ID'. The third is 'FirstName' with the value 'SARAH' entered. The fourth is 'FirstName' and the fifth is 'MiddleName'. An 'OR' operator is positioned between the two 'FirstName' fields. A mouse cursor is pointing at the 'OR' operator.

**NOTE:** Click on the keyword label (or within the keyword box press F6) to add additional search fields of the same keyword type. **Example:** You would like to search for the essays for students Bryan Chin and Chris Stone. In order to search for both last names, click on the last name keyword label and be sure to click on the AND operator to change it to OR.

## 5. Keyword Operators and Wildcards

The Keyword Type Edit Field default property = (equal to) will appear in a box on the right side of each Keyword Type Edit Field, and the default binary operator, AND will appear in a box on the right side of each Keyword Type Edit Field when multiple search fields have been activated for a Keyword in the Document Retrieval dialog box.



If you left-click the = operator, it will act as a toggle switch and allow you to toggle through the following choices (choices vary depending on the format of the Keyword, i.e. date, alphanumeric, currency, etc. )

	<b>Equal To allows you to search for keyword values that are an exact match to what is entered for retrieval.</b>
	Not Equal To allows you to search for keyword values that are not equal to the keyword value entered for retrieval.
	Double Quotes returns only those documents containing the literal entry.
	Greater Than allows for the retrieval of documents with keyword values greater than the numeric or date value entered for retrieval.
	Less Than allows for the retrieval of documents with keyword values less than the numeric or date value entered for retrieval.
	Greater Than/Equal To allows for the retrieval of documents with keyword values greater than or equal to the numeric or date value entered for retrieval.
	Less Than/Equal To allows for the retrieval of documents with keyword values less than or equal to the numeric or date value entered for retrieval.
F6	F6 opens a second entry field for the active keyword. You can also click on the keyword label.
	And allows for searching two or more values of the same keyword type that exists on the selected document type.
	Or allows you to search either one (or more) documents containing either one or more specific keyword types. Click And to change to Or.
	To allows you to search from one keyword to another keyword of the same keyword. Used with Numeric or Date keywords.

**Wildcards**

Combined with keyword values can be used to retrieve documents.

*	Replaces multiple characters. (ADAMS* would retrieve ADAMS, ADAMSON, ADAMSTON, etc.)
?	Replaces a single character. (SM?TH would retrieve SMITH, SMYTH, SMOTH, etc.)

## 6. Document Retrieval by Date Range

.....

**Select a Document Type Group.** You will now see a list of Document Types for the selected Document Type Group.

.....

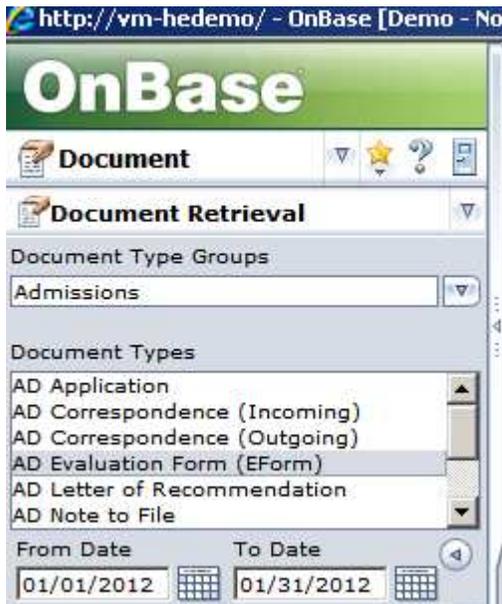
**Select the Document Type(s) to retrieve**

.....

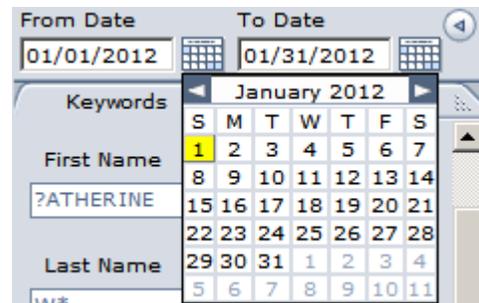
**Click the Search icon**  to execute the search. The **Document Search Results** window will display in the upper right-hand window.

.....

**Enter a date range** in the **From** and **To** fields



**NOTE:** You can also select the calendar icon to select the date you wish to search for.



.....

**Click the search icon** 

All of the documents in OnBase for the selected Document Type that have a Document Date within the date range indicated in the search parameters will be displayed in the **Document Search Results** window

.....

**Double-click on any of the documents** to view it

## 7. Document Retrieval by Cross Reference

A **Cross Reference** is a relationship between a Document Type and one or more other Document Type(s). This allows you to double-click on a document and retrieve the related document(s).

To open a document by cross-reference:

.....

Retrieve a document

.....

**Double-click** on that document. If a cross reference has been configured for the Document Type, this will automatically display a new Document Search Results window listing all of the documents related to the original document. **NOTE:** All this happens without having to enter Keyword information.

Black Redaction | Redaction

1 / 1 | 20%

http://vm-hedemo/ - AD Evaluation Form (EForm) for WILLIAM MCKINLEY (ID: 000067795)

AD Evaluation Form (EForm) for WILLIAM MCKINLEY (ID: 000067795)

AD Letter of Recommendation for WILLIAM MCKINLEY (ID: 000067795)

AD Correspondence (Incoming) for WILLIAM MCKINLEY (ID: 000067795)

[1] AD Application for WILLIAM MCKINLEY (ID: 000067795)

AD Test Scores for WILLIAM MCKINLEY (ID: 000067795)

AD Correspondence (Outgoing) for WILLIAM MCKINLEY (ID: 000067795)

AD Transcript (High School) for WILLIAM MCKINLEY (ID: 000067795)

AD Transcript (College) for WILLIAM MCKINLEY (ID: 000067795)

**High School Information**

High School	ONBASE HIGH
CEEB	1000
GPA	3.9
Class Rank	7

0 Note(s)

RELIGIOUS PREFERENCE: ENGLISH MOST FREQ. SPOKEN IN HOME: \_\_\_\_\_

SPECIAL MESSAGE:  U.S. GRADES FOR TWO OR MORE SUBJECT AREAS AND/OR ONE OR MORE SCORES NOT REPORTED. NO PREDICTIVE INFORMATION POSSIBLE.

**Double-click** a document in the search results hit list to open it. You can then position the windows side-by-side, or move the new window to a separate monitor if your workstation is configured with dual monitoring, to view multiple documents at the same time.

## 8. Document Retrieval by Custom Query



A **Custom Query** can be developed to allow users to more easily retrieve documents that exist within OnBase. This allows the user to find the specified documents using a pre-defined form and limits the criteria needed to perform the search.

To perform a custom query:

.....  
Select **Custom Queries** under the Document Retrieval dropdown  
.....

Select a Custom Query



---

.....

**Enter the search criteria**

.....

**Click the Search icon**  Your search result(s) will be displayed in the Document Search Results window.

.....

**Double-click on a document** you wish to view. It will be displayed below the search results hit list.

## 9. The Right-click Menu

To view the right-click menu options for an open document:

.....

**Open a document**

.....

**Right-click on the image** to bring up the **Menu Options** screen

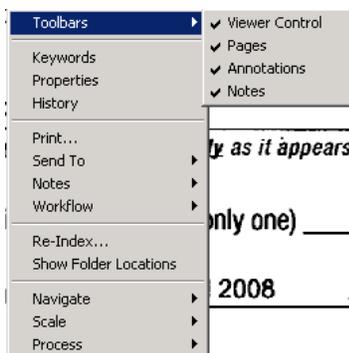
**NOTE:** Many of these functions can also be performed by clicking an icon on the toolbar.

**NOTE:** Some of these options may not be available, due to licensing and/or user permissions.

.....

### Toolbars

Allows you to select which toolbars you would like displayed



.....

### The Viewer Control Toolbar

	<b>Brings you to the first page of the document</b>
	Takes you to the previous page
	Takes you to the next page
	Brings you to the last page of the document
	Zooms in on the image
	Zooms out on the image
	Displays image in its actual size
	Fits the entire Width of the image on the screen
	Fits the entire Length and Width of the image on the screen

	Rotates image to the left 90°
	Rotates image to the right 90°
	Displays viewer options

## Keywords

Will display all the keywords associated with the selected (open) document

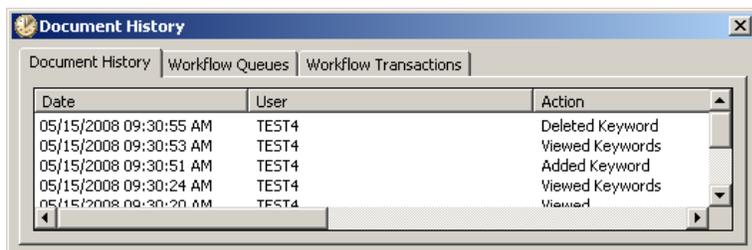
## Properties

Displays information about the document including its physical location and batch number

Page	Disk Group	Volume	# of Pages	# of Lines	File Format	Item Offset	Item Size	File Path
0	101	1	1	0	2	0	85480	W1\1\973.TIF
1	101	1	1	0	2	0	249662	W1\1\974.TIF

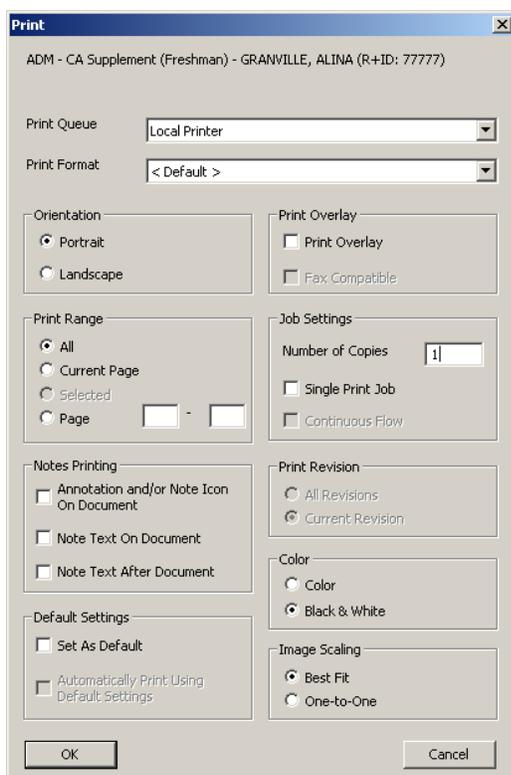
## History

Provides a list of past actions performed on the document. Entries are sorted in descending order, with recent actions first.



## Print

Allows you to print a document (also can click on the Print icon  in the toolbar)



### Orientation

Select Portrait (tall) or Landscape (wide)

### Print Range

<b>All</b>	prints entire document
<b>Current Page</b>	prints current page being viewed
<b>Selected</b>	only prints selected section of the document (This option is only available for

	COLD documents or Text Reports)
<b>Page</b>	prints selected range of pages

**Notes Printing**

<b>Annotation and/or Note Icon on Document</b>	<b>Prints note icon or annotation on document</b>
<b>Note Text On Document</b>	Prints note text on document
<b>Note Text After Document</b>	Prints text of all document notes on a separate page

**NOTE:** Only notes to which you have access will print.

**Default Settings**

Set as Default – sets the current print settings as the default. Once selected, the Automatically Print Using Default Settings is available for selection. When checked, the next time the user prints, the document will automatically be printed in the default format, to the default printer without displaying the print dialog box to the user.

**Print Overlay**

<b>Print Overlay</b>	<b>prints a layout of the COLD document that will be sent to the customer in a letter format</b>
<b>Fax Compatible</b>	prints to a fax server if OnBase is configured for it

**Job Settings**

<b>Number of Copies</b>	<b>Number of copies to print</b>
<b>Single Print Job</b>	pauses between jobs the user has asked to print, for multiple print jobs
<b>Continuous Flow</b>	allows several large documents to be printed from different locations

**Print Revision**

**NOTE:** works only if the EDM Services Module is licensed

<b>All Revisions</b>	<b>prints all revision levels of the selected document type</b>
<b>Current Revision</b>	prints the most recent or current revision of the selected document type

**Color**

Gives the user the option to print in Color or Black & White when using a color printer

**NOTE:** The printer automatically prints to the default printer. If there is another printer, the user will have to choose it by clicking on the dropdown next to the Print Queue.

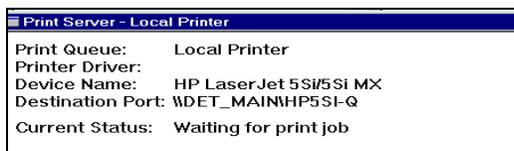
---

### Image Scaling

Select Best Fit or One-to-One

---

Upon printing, the Print Server screen appears and the document prints



---

### Send To

This functionality is covered in the Quick Reference guide for scanning and indexing

---

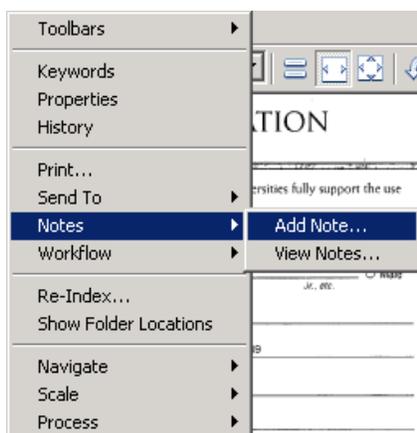
### Notes

Notes allow users to apply notes to the document.

### Adding Notes

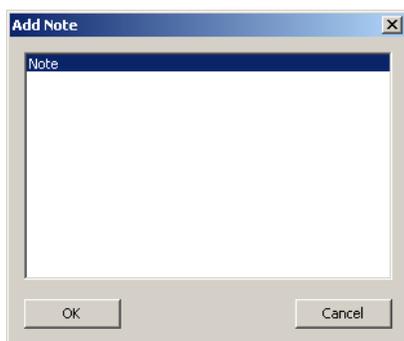
---

Click the **Add Note icon**  (or select the Add Note option from the right-click shortcut menu to display the Add Note dialog box.)



---

Double-click the **note type** you wish to use. This will display the Note box.



.....

Type a message in the edit field.

**NOTE:** Some notes may have default text already assigned. You may add your message after the default text.

### Viewing or Modifying a Note

.....

Click the yellow header of the note to display the note contents (the note window will appear)

.....

Make the necessary changes to the note (provided you have rights to make changes.)

.....

Click the yellow header to minimize the note (All changes made to the note contents will be saved and the note will be minimized to an icon on the open document)

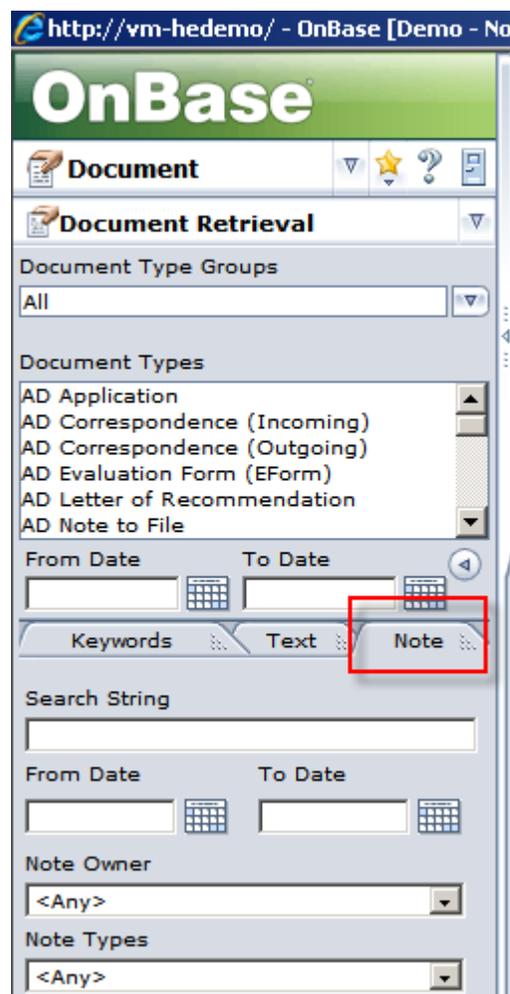
### Note Search

.....

Select the Document Type(s), from the Document Retrieval dialog box, that you want to limit your note search to.

.....

Select the Note tab to display the Note Text Search dialog box.



.....  
**Select a note type** from the Note Types box if you want to restrict your search to a particular note

.....  
**Enter the word(s) you wish to search for** in the Search String box

.....  
**Click the search icon** (A list of documents will be displayed that contain notes with the search criteria you requested)

.....  
**Double-click on any document** to view it

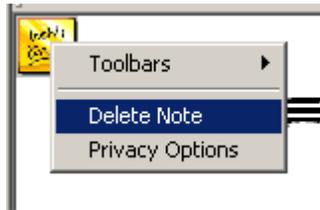
.....  
**Click on the note icon** to read the text of the note.

### **Deleting Notes**

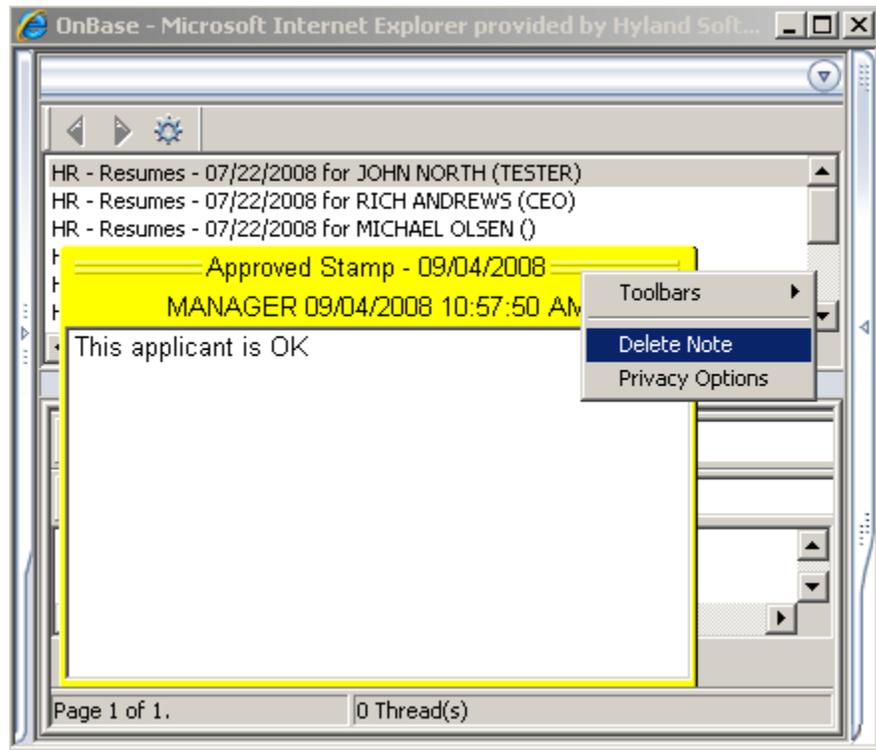
.....  
**Right-click on the note icon** or the yellow header of the note you wish to delete

**Select Delete Note**

**NOTE:** Once notes are deleted they cannot be recovered, however Document History will record the user that deleted the note



*Right-click on the note icon.*



*Right-click in the note header.*

**Workflow**

Used to perform Workflow tasks (if applicable)

**Re-Index**

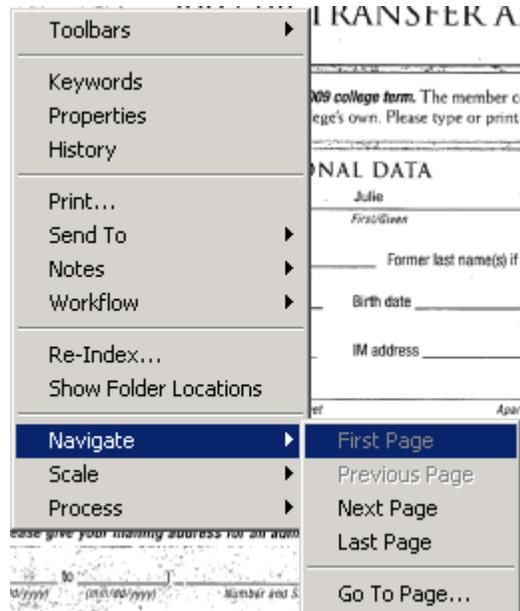
This functionality is covered in the Quick Reference guide for scanning and indexing

**Show Folder Locations**

Shows in which folder(s) this document resides (if applicable)

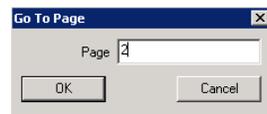
## Navigate

provides the following options:



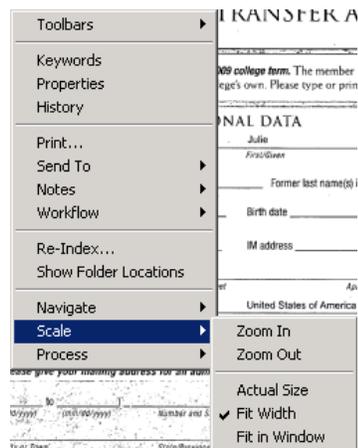
### Go To Page

Allows user to go directly to the page indicated.



### Scale

Allows you to zoom in and out

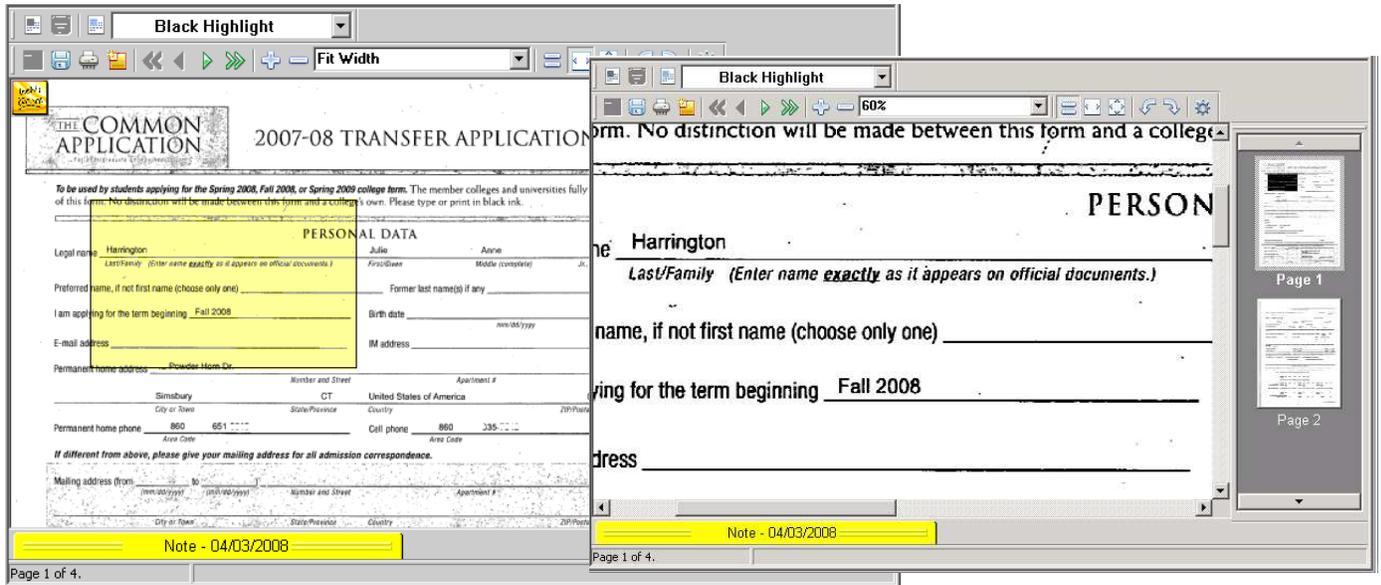


### Zoom In/Out

Alternatively:

Left-drag the mouse over a section and a box will begin to form

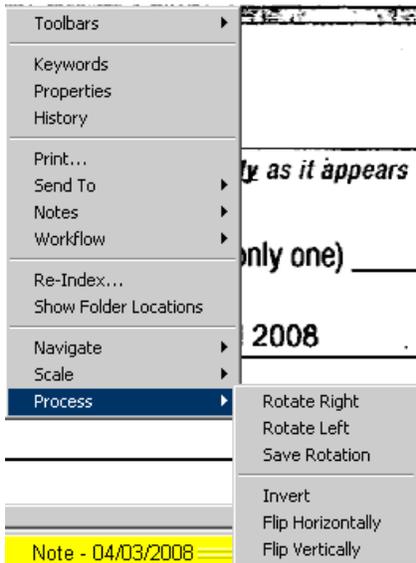
Release the mouse and the area will be enlarged



## Process

Allows you to rotate, flip, and invert the image

**NOTE:** Be sure to click Save Rotation after rotating the image



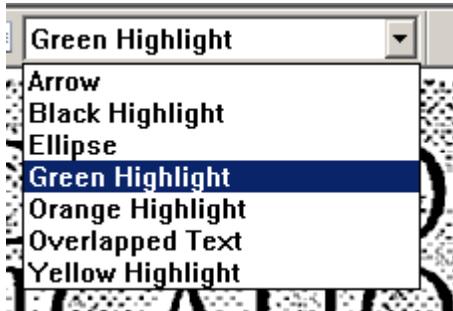
## 10. Annotations

### Highlights

To use a **Highlight Annotation**:

.....

Select a **highlight annotation** from the **Annotation Type** dropdown



.....

Click the **Toggle Annotation icon**  to turn the annotation on

.....

**Left-click and drag your mouse** over the portion of the document that you would like to highlight

.....

**Release your left-click** and the highlight will appear on the document

**PERSONAL DATA**

Legal name Harrington Julie Anne  Female  
Last/Family (Enter name exactly as it appears on official documents.) First/Middle (complete) Jr., etc.

Preferred name, if not first name (choose only one) \_\_\_\_\_ Former last name(s) if any \_\_\_\_\_

I am applying for the term beginning Fall 2008 Birth date mm/dd/yyyy

E-mail address julie.harrington@.edu IM address \_\_\_\_\_

Permanent home address Powder Horn Dr.  
Number and Street Apartment #  
Simsbury CT United States of America 06070  
City or Town State/Province Country ZIP/Postal Code

Permanent home phone 860 651-... Cell phone 860 335-...  
Area Code Area Code

*If different from above, please give your mailing address for all admission correspondence.*

Mailing address (from \_\_\_\_\_ to \_\_\_\_\_)  
(mm/dd/yyyy) (mm/dd/yyyy) Number and Street Apartment #  
City or Town State/Province Country ZIP/Postal Code

If your mailing address is a college or university, include name of school here: \_\_\_\_\_

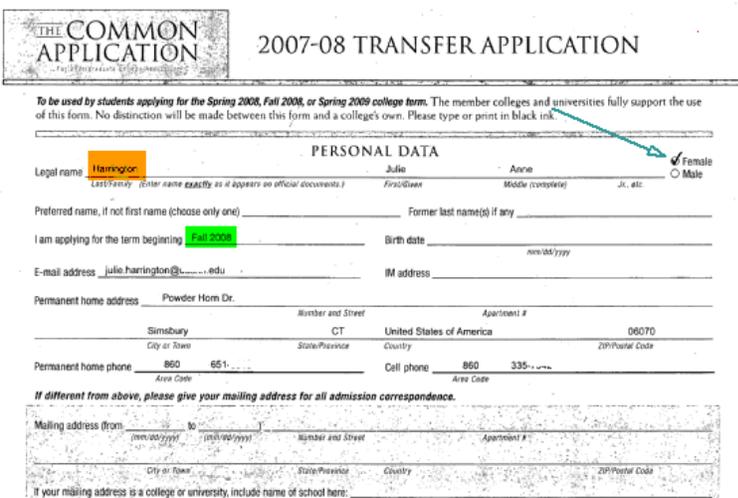
## Arrows

To use the **Arrow Annotation**:

Select **Arrow** from the **Annotation Type** dropdown

Click the **Toggle Annotation icon**  to turn the annotation on

**Left-click and drag your mouse** where you would like the arrow to display. (Where you release the left-click is where the head of the arrow will be displayed)



**THE COMMON APPLICATION** 2007-08 TRANSFER APPLICATION

To be used by students applying for the Spring 2008, Fall 2008, or Spring 2009 college term. The member colleges and universities fully support the use of this form. No distinction will be made between this form and a college's own. Please type or print in black ink.

**PERSONAL DATA**

Legal name: Harrington Last Name (enter name exactly as it appears on official documents) | Julia First Name | Anne Middle (complete) | Jr., etc. |  Female  Male

Preferred name, if not first name (choose only one) \_\_\_\_\_ Former last name(s) if any \_\_\_\_\_

I am applying for the term beginning: Fall 2008 Birth date: \_\_\_\_\_ mm/dd/yyyy

E-mail address: julie.harrington@.....edu IM address: \_\_\_\_\_

Permanent home address: Powder Horn Dr. Number and Street | Simsbury City or Town | CT State/Province | United States of America Country | 06070 ZIP/Postal Code

Permanent home phone: 860 651-..... Area Code | Cell phone: 860 335-..... Area Code

If different from above, please give your mailing address for all admission correspondence.

Mailing address (from \_\_\_\_\_ to \_\_\_\_\_) \_\_\_\_\_ Number and Street | \_\_\_\_\_ City or Town | \_\_\_\_\_ State/Province | \_\_\_\_\_ Country | \_\_\_\_\_ ZIP/Postal Code

If your mailing address is a college or university, include name of school here: \_\_\_\_\_

## Overlap Text

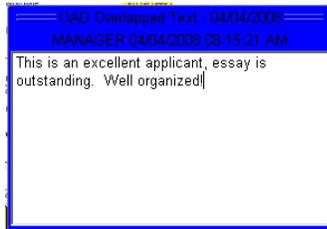
To use **Overlapped Text**:

Select **Overlap Text** from the **Annotation Type** dropdown

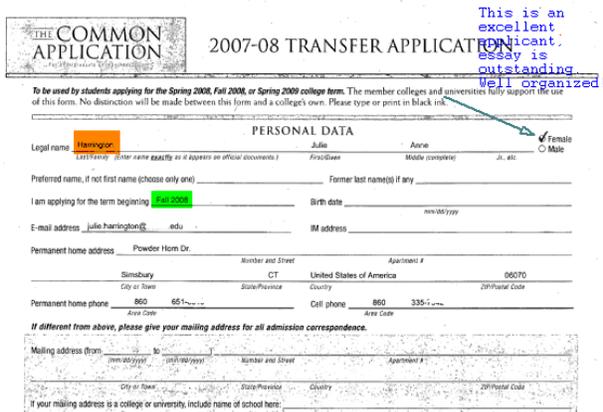
Click the **Toggle Annotation icon**  to turn the annotation on

**Left-click and drag your mouse** where you would like the Overlapped Text to be displayed on the document. (A note window will pop-up for you to type the text you would like displayed on the document.)

Type a note



When you minimize the note, the Overlapped Text will be displayed on the document.



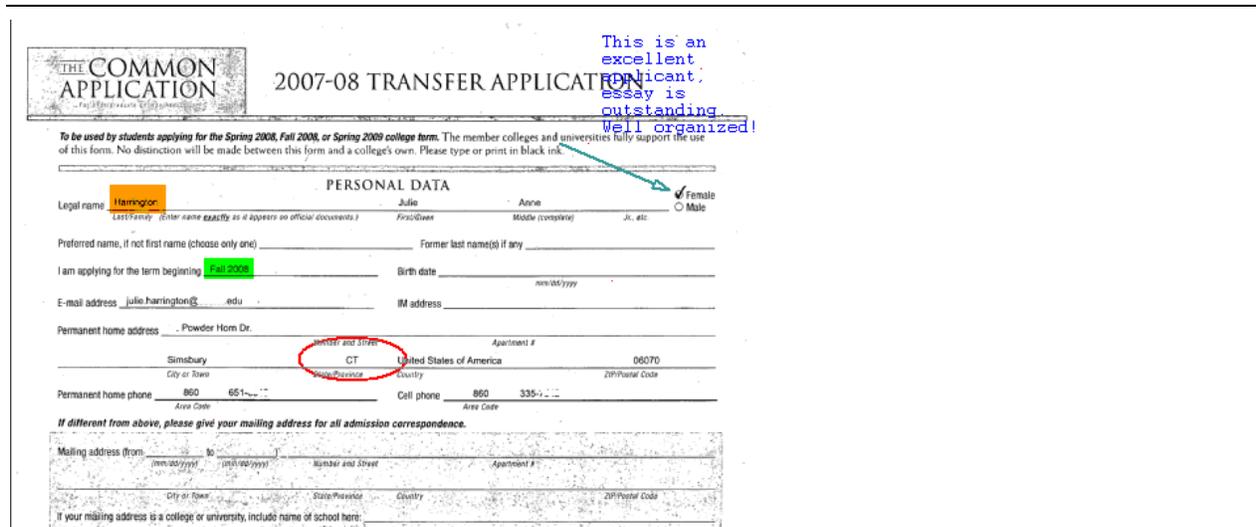
## Ellipses

To use the **Ellipse Annotation**:

Select **Ellipse** from the **Annotation Type** dropdown

Click the **Toggle Annotation icon**  to turn the annotation on

**Left-click and drag your mouse** over the portion of the document that you would like the ellipse displayed. (When you release the left-click the ellipse will display on the document)



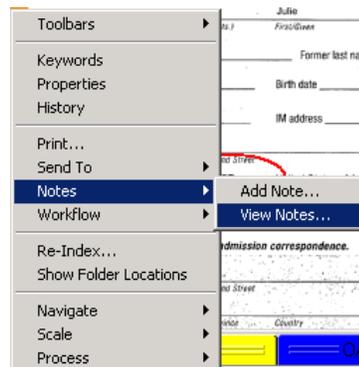
### Deleting Annotations

To delete an annotation:

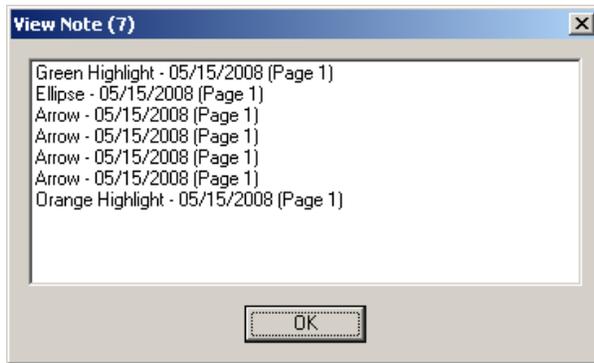
Right-click on the document

Select Notes

Select View Notes (A list of all of the annotations on the document will be displayed)

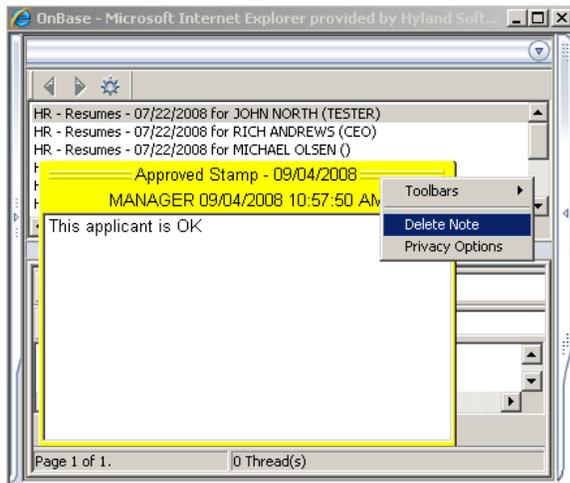


Select the annotation to delete (The annotation will open up for you to verify that is what you wish to delete)



Right-click on the annotation note

### Select Delete Note



## 11. Internal Mail

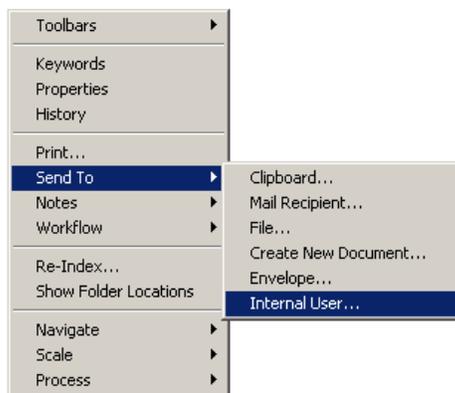
### Sending Internal Mail

Use **Internal Mail** within OnBase to securely send documents to other users for review. To send a document via Internal Mail:

.....  
**Right-click** on a document

.....  
**Choose Send to >**

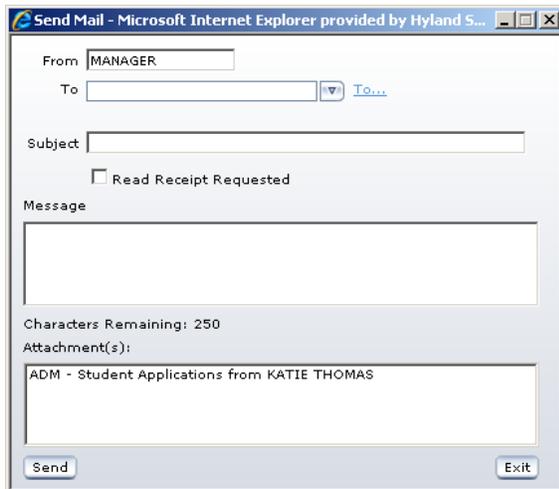
.....  
**Choose Internal User...**



.....  
**Choose a recipient** from the dropdown menu, (or choose a group of recipients by clicking the **To...** link

.....  
**Type a subject**

.....  
**Type a message**



The document will be sent as an attachment to the user(s) you select.

### Retrieving Internal Mail

To access your own internal mailbox:

.....

Click **User** in the dropdown next to **Document** in the **Navigation Panel**



.....

Double-click a message to view it

.....

Click the **Delete** icon to delete the message

