

Web Client Retrieval

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Table of Contents

Di	sclaimerii
Do	cument Attributes Error! Bookmark not defined.
	Table of Contents iii
1.	Before Beginning5
2.	Starting OnBase
3.	Document Retrieval by Document Type9
4.	Document Retrieval by Keywords
5.	Keyword Operators and Wildcards
6	Document Retrieval by Date Range
7	Document Petrioval by Cross Peferonse
7.	
8.	Document Retrieval by Custom Query19
9.	The Right-click Menu21
	Toolbars
	Keywords
	Properties
	History
	Print23
	Send To
	Notes
	Workflow
	Used to perform Workflow tasks (if applicable)
	Re-Index
	Show Folder Locations
	Shows in which folder(s) this document resides (if applicable)
	Navigate
	Scale
	Process



10. Annotations	
Highlights	
Arrows	
Overlap Text	
Ellipses	
Deleting Annotations	
11. Internal Mail	
Sending Internal Mail	
Retrieving Internal Mail	
12. Shortcut Keys	Error! Bookmark not defined.
13. Java Client	Error! Bookmark not defined.



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

Web Client Retrieval





.....

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

ttings —		1	
ر (() () () () () () () () () () () () ()	Disable Disable Second		
▼Takes eff eset custo eset to:	fect after you restart Internet Explorer		
	OK Cancel		
ck the	e Security tab		

Add the OnBase Web Client URL to the Trusted Sites zone

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Web Client Retrieval



Trusted sites	×
You can add and remove websites from this zone this zone will use the zone's security settings.	e. All websites in
Add this website to the zone:	
http://YourOnBaseWebServer/	Add
Websites:	
http://srv-ceros http://srv-cmcd1 http://srv-cmcd2 http://srv-hsidb	<u>R</u> emove
http://srv-sharepoint	
Require server verification (https:) for all sites in this	zone
	lose

.....

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.

💋 http://vm-hedemo/ - OnBase [Demo - No	t For Production Use] - Windows Internet Explorer	
OnBase		
📝 Document 🛛 🦻 😤 📱		
Document Type Groups		
All		
Document Types		
AD Application AD Correspondence (Incoming) AD Correspondence (Outgoing) AD Evaluation Form (EForm) AD Letter of Recommendation AD Note to File From Date To Date Keywords Text Note		1980 -
Full Text Search		
A 🔮 🤣 🖾		,



3. Document Retrieval by Document Type

OnBas	e			
Document		V 1	* ?	2
Pocument Retrie	val			V
Document Type Groups	;			
All				
Document Types AD Application AD Correspondence (Ir AD Correspondence (O AD Evaluation Form (EF AD Letter of Recomment AD Note to File	icomin utgoin iorm) ndatio	g) g) n		•
From Date To	Date			
Keywords 1	ext 🔅	X	Note	e
High School		2		
1	4			
State	1			
	<u>\</u>	Ŋ		
CEEB Code		13		-
🔎 Full Text Search				0
M 🕑 🥍		ß	A 1012	

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
1	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.

OnBas	/ - OnBas	e [D	em	0 - N
Pocument	⊽	\$?	E1
Document Retrie	val			V
Document Type Group	5			
All				
All				
Admissions Financial Aid Provost				
Registrar				
System Documents				
Undergraduate Admiss	sion			

.....

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.

🧀 http://vm-hedemo/ - OnBase [Demo - Not For Production Use] - Windows Internet Explorer						
OnBase						
🚰 Document 🛛 🔻 😤 🚪	AD Letter of Recommendation for WILLIAM MCKINLEY (ID: 000067795) AD Correspondence (Incoming) for WILLIAM MCKINLEY (ID: 000067795)					
Document Retrieval	[1] AD Application for WILLIAM MCKINLEY (ID: 000067795) AD Test Scores for WILLIAM MCKINLEY (ID: 000067795) AD Correspondence (Outgoing) for WILLIAM MCKINLEY (ID: 000067795)					
Document Type Groups						
Admissions	AD Transcript (High School) for WILLIAM MCKINLEY (ID: 000067795) AD Transcript (College) for WILLIAM MCKINLEY (ID: 000067795)					
Document Types						
AD Application						
AD Correspondence (Incoming) AD Correspondence (Outgoing)						

.....

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.

Web Client Retrieval



4 🕨 🌣				
AD Letter of Recommendation for	r WILLIAM MCKINLEY (ID: 000067795)			
AD Correspondence (Incoming) for	or WILLIAM MCKINLEY (ID: 000067795)			
AD Test Scores for WILLIAM MCK	(INLEY (ID: 000067795)			
AD Correspondence (Outgoing) f	or WILLIAM MCKINLEY (ID: 000067795)			
AD Transcript (High School) for W	/ILLIAM MCKINLEY (ID: 000067795)			
AD Transcript (College) for within	AM MCKINEET (ID: 000087795)			
Black Redaction	🗾 🗐 📰 Redaction	<u> </u>		
	▲ ▷ ১৯ 🔲 1 / 2 🛛 🖧 📼 Fit Width			
	``			
			Annl	ination
			Аррі	ICation
			•••	
				For Admission
	Applicant Information			
	11 In 1			
	McKinleu	William		
	Last Name	First Name		Middle Initial
	Last Name	Flist Name		
	ATA TIAL REAL	LI AA	211	
	350 Fairlady Street	Westlake	UIT	<u> </u>
	Address Ø	City	State	Zip Code
	1 916 AAA EEEE	(DAL) FFF	A A A A	



4. Document Retrieval by Keywords

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

	edemo/ - O	nBas	e [D	em	<u> 1 - L</u>
OnB	ase				
Documen	t	₹	\$?	70
Document	Retrieval	i			⊽
Document Type	Groups				
Admissions					
Document Type	is				4
AD Correspond	ence (Incor	ning)			-
AD Correspond AD Correspond AD Evaluation F AD Letter of Re AD Note to File	ence (Incor ence (Outg Form (EForn commenda	ning) oing) n) tion			
AD Correspond AD Correspond AD Evaluation F AD Letter of Re AD Note to File From Date	ence (Incor ence (Outg form (EForn commenda To Dat	ning) oing) n) tion :e			
AD Correspond AD Correspond AD Evaluation F AD Letter of Re AD Note to File From Date Keywords	ence (Incor ence (Outg form (EForn commenda To Dat	ning) oing) n) tion :e	No	ote	
AD Correspond AD Correspond AD Evaluation F AD Letter of Re AD Note to File From Date Keywords First Name	ence (Incor ence (Outg form (EForn commenda To Dat	ning) oing) n) tion :e : :	No	ote	
AD Correspond AD Correspond AD Evaluation F AD Letter of Re AD Note to File From Date Keywords First Name ?ATHERINE	ence (Incor ence (Outg form (EForn commenda To Dat	ning) oing) n) tion :e :	Ne	(minimized)	
AD Correspond AD Correspond AD Evaluation F AD Letter of Re AD Note to File From Date Keywords First Name ?ATHERINE Last Name	ence (Incor ence (Outg form (EForn commenda To Dat	ning) oing) n) tion :e =	No	(minimized	

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.

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OnBase Quick Reference Guide Web Client Retrieval



.....

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.

Keywords 🗽 Text	t 🗽 Note
	=
Common Application ID	=
SARAH	=
FirstName	=
MiddleName	=

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.



Keywords 🐘 Tex	kt 🚉 Noti
UID	
	5
Common Application ID	<>
FirstName	
	15
MiddleName	=
LastName	=
]

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.)

	Equal To allows you to search for keyword values that are an exact match to what is entered for retrieval.
\bigcirc	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.
$\overline{}$	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	And allows for searching two or more values of the same keyword type that exists on the selected document type.
OR	Or allows you to search either one (or more) documents containing either one or more specific keyword types. Click And to change to Or.
то	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

OnBas	/ - OnB-	as	e [[)em	0 - N
Document	1	V	¢	?	5
Pocument Retrie	eval				V
Document Type Group	s				
Admissions					
Document Types AD Application AD Correspondence (I AD Correspondence (C AD Evaluation Form (E AD Letter of Recomme AD Note to File	ncomin Dutgoin Form) endatio	g) g)			
From Date To 01/01/2012	Date 1/31/20)1	2		

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

F	rom Date	To Date							
Ī	01/01/2012		01/31/2012						
Keywords January 2012									
	,	s	М	Т	W	Т	F	s	
First Name		1	2	3	4	5	6	7	
	ruse wanne	8	9	10	11	12	13	14	
	?ATHERINE	15	16	17	18	19	20	21	
		22	23	24	25	26	27	28	
	Last Name	29	30	31	1	2	3	4	
	\M/*	5	6	7	8	9	10	11	

Click the search icon 🥙

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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	_
🔳 🖶 🚔 🗳 候 📢	>>> 1 /1	

	http://vm-hedemo/ - AD Evaluation Form (EForm) for WILLIAM MCKINLEY (ID: 0000)						
[
H.S. ATTENDED:							
SCORES AND SUBSCORE AREAS	AD Evaluation Form (EForm) for WILLIAM MCKINLEY (ID: 000067795)						
PREDICTIVE ENGLISH DATA UsignMechano (Seb ACT Herewal Shit Liber Pro-Ng /Een M Aisrobook) Ag-Coard Geor Pro-Ng /Een M	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)						
LOCAL NORMS REP ADMISSION ENROLLMENT DATA 3992	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)						
POLITICAL S POLITICAL S POST VOCATIONAL	High School Information						
MORATED IN	High School ONBASE HIGH CEEB 1000						
R R Y Y R	GPA 3.9 Class Rank 7						
PLANS TO SEEK FINANC							
STREAM BACC SCORE BTOREST AFA AFA G4 SCIENCE A TEDN. 56 SOCIAL SCIENCE 71 ADML A SALES 62 DUMERSS OFEA. 359 TECHNOLIK	0 Note(s) 5 8 4 X						

.....



Double-click a document in the search results hit list to open it. You can then position the windows sideby-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





.....

Enter the search criteria

.....

Click the Search icon P 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

<	Brings you to the first page of the document
	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
8	Displays image in its actual size
• •	Fits the entire Width of the image on the screen
\bigcirc	Fits the entire Length and Width of the image on the screen

Web Client Retrieval



Ş	Rotates image to the left 90°
ð	Rotates image to the right 90°
\$	Displays viewer options

Keywords

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

	Add / Modify Keywords	×	
	ADM - CA Supplement (Fresh	iman)	
,	ADM - CA Supplement (Fresh	man) - WARD, BERT (R+ID: 44221)	
1	Keywords	Document Date 05/14/2008	
	Recruitment Plus ID	44221	
	Common App ID	44221	
	Banner ID	44221	
	QuestBridge ID	44221	
	Last Name	WARD	
	First Name	BERT	
	Middle Name		
[Save	Cancel	

.....

Properties

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

Document Information for Document Handle 943					×				
Document Name ADM - CA Supplement (Freshman) - HUGHES, KEVIN (R+ID: 11111)									
Batch Number		1	03 Document	Document Date		Archival Date		04/24/2008	
Document Type Number		103	2 Document	Type Name	ADM ·	- CA Supplemen	t (Freshman)		
Document Status		0	Document	Type Revision	1	Revision		1	
Created	Created By					Security Va	lue	0	
	D: L C					71 O.C. I	1 C	ct o d	
Page	Disk Group	volume	# or Pages	# or Lines	File Format	Item Orrset	Item Size	File Path	- 1
U	101	1	1	U	2	U	85480	(¥1)(1)973.11F	
	1 101 1 1 0 2 0 249662 \VI\1\974.TIF								

.....

History

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

Web Client Retrieval



Document History		
Document History Workflow	Queues 🛛 Workflow Transactio	ns
Date	User	Action
05/15/2008 09:30:55 AM	TEST4	Deleted Keyword
05/15/2008 09:30:53 AM	TEST4	Viewed Keywords —
05/15/2008 09:30:51 AM	TEST4	Added Keyword
05/15/2008 09:30:24 AM	TEST4	Viewed Keywords
05/15/2008 09:30:20 AM	TESTA	Viewed
•		Þ

.....

Print

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

int	<u>×</u>	
ADM - CA Supplement (Freshman) - GRANVILLE, ALINA (R+ID: 77777)		
Print Queue Local Printer	Queue Local Printer	
Print Format		
<pre> < Deraulc ></pre>		
Orientation	Print Overlay	
O Portrait	Print Overlay	
C Landscape	Fax Compatible	
Print Range	Job Settings	
All	Number of Copies	
C Current Page		
C Selected	J Single Print Job	
C Page	Continuous Flow	
Notes Printing	Print Revision	
Annotation and/or Note Icon Op Decument	C All Revisions	
	Current Revision	
Note Text On Document		
Note Text After Document	C Color	
Default Settings	Black & White	
Set As Default	- Image Scaling	
Automatically Drink Linea	Bect Fit	
	- cost n	

.....

Orientation

Select Portrait (tall) or Landscape (wide)

.....

Print Range

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

OnBase Quick Reference Guide Web Client Retrieval

OnBase a Hyland Software solution

	COLD documents or Text Reports)
Page	prints selected range of pages

.....

Notes Printing

Annotation and/or Note Icon on Document	Prints note icon or annotation on document
Note Text On Document	Prints note text on document
Note Text After Document	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

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

Job Settings

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

Print Revision

NOTE: works only if the EDM Services Module is licensed

All Revisions	prints all revision levels of the selected document type
Current Revision	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

Print Server - Local Printer		
Print Queue: Printer Driver:	Local Printer	
Device Name: Destination Port:	HP LaserJet 5Si/5Si MX \\DET_MAIN\HP5SI-Q	
Current Status:	Waiting for print job	

.....

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

Toolbars	۲	
Keywords Properties History		
Print Send To	×	ersities fully support the use
Notes	•	Add Note
		Haanocom
Workflow	Þ	View Notes
Workflow Re-Index Show Folder Locations	Þ	View Notes
Workflow Re-Index Show Folder Locations Navigate	•	View Notes
Workflow Re-Index Show Folder Locations Navigate Scale	• •	View Notes

.....

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

Web Client Retrieval



Add Note	×
Note	
	1
	Cancel

.....

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.

Web Client Retrieval



sttp://vm-hedemo/ - OnBase [Demo - N	0
OnBase	
🚰 Document 🛛 🦻 😤 📱	
🖉 Document Retrieval 🔍	
Document Type Groups	
All	1
Document Types	4 E
AD Application AD Correspondence (Incoming) AD Correspondence (Outgoing) AD Evaluation Form (EForm) AD Letter of Recommendation AD Note to File	
From Date To Date Keywords Text Note	
Search String	
From Date To Date	
Note Owner	
<any></any>	
Note Types	
<any></any>	
Select a note type from the Note Types b	ox if you want to restrict your search to a particular note
Enter the word(s) you wish to search fo	r in the Search String box
Click the search icon (A list of document requested)	s will be displayed that contain notes with the search criteria you
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	v 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 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:

Toolbars 🕨	I KANSFER A
Keywords	109 college term. The member of
Properties	ege's own. Please type or print
History	INAL DATA
Print	. Julie ·
Send To	Fical/Giren
Notes •	Former last name(s) if
Workflow	Birth date
Re-Index	IM address
Show Folder Locations	w dow
Navigate 🕨 🕨	First Page
Scale 🕨 🕨	Previous Page
Process •	Next Page
ease give your maning autress for an aut	Last Page
to provide the second s	Go To Page

Go To Page

Allows user to go directly to the page indicated.



Scale

Allows you to zoom in and out

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Zoom In/Out

Alternatively:

Web Client Retrieval



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

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Release the mouse and the area will be enlarged

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Page 1 of 4.	Page 1 of 4.

Process

Allows you to rotate, flip, and invert the image

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

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Note - 04/03/2008 =	Flip Vertically

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OnBase Quick Reference Guide Web Client Retrieval



Annotations 10.

Highlights

To use a Highlight Annotation:

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Select a highlight annotation from the Annotation Type dropdown

Green Highlight Arrow Black Highlight Ellipse Green Highlight Orange Highlight Overlapped Text Yellow Highlight						
Click the Toggle Annotatio	n icon 🖭 to	turn the anr	notation on			
Left-click and drag your m	ouse over the	portion of t	ne document	that you	ı would	like to highlight
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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 leftclick is where the head of the arrow will be displayed)

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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

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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)

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Deleting Annotations

To delete an annotation:

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Right-click on the document

Select Notes

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



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

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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:

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Right-click on a document

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Choose Send to >

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Choose Internal User...



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

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Type a subject

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Type a message

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Send

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

Retrieving Internal Mail

To access your own internal mailbox:

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



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Click the Delete icon to delete the message

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