

# OnBase<sup>®</sup> 18

## Unity Client

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# Using the Module Reference Guide (MRG)

If you are unfamiliar with module reference guides (MRGs), please review the content below so that you can more quickly and efficiently locate the information you need.

The MRG is a PDF document containing all available instructions for a module. The content in this MRG is considered module-specific. You may be referred to another MRG if a referenced function is not specific to this module.

Each MRG typically includes the following chapters:

- **Exposure** - Provides introductory information and license requirements.
- **Usage** - Provides procedures for user-facing functionality.
- **Configuration** - Provides procedures for configuration and system administration.
- **Installation** - Provides system requirements and installation procedures.

You can open any chapter or section in the MRG by clicking its entry in the Table of Contents.

It is considered a best practice to read through an entire procedure before attempting to complete any of its steps. Pay close attention to notes, tips, and cautions, which can help you better understand the entire process and discover any prerequisites you may not have completed.

The MRGs use notes, tips, and cautions to draw your attention to additional information.

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**Note:** A note provides supplemental information or highlights behavior you might not expect.

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**Tip:** A tip describes extra, non-crucial information, such as a shortcut, reminder, or use for a feature you might not think of.

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**Caution:** Cautions are designed to help protect the system from data loss or severe issues that may arise when an instruction is not followed properly.

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**Cross-references** are links to related information or additional instructions you may need to complete a task. Click a cross-reference to navigate to the referenced section. To return to the page you were viewing before following a cross-reference, press **Alt + Left Arrow** until the desired page is displayed.

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- **Basic search:** Press **Ctrl + F**. Enter the word or phrase you are looking for in the search box and press **Enter** to locate each instance.
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  - **In the current document** - Searches the document you are viewing.
  - **All PDF Documents in** - Searches a selected folder or directory. If you are unsure of which MRG to search, try searching the folder where your MRGs are located to display all results for the word or phrase.

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## QUICK REFERENCE GUIDE

## Overview

The OnBase Unity Client is a connected, next-generation document management system that offers the familiar look-and-feel of Microsoft® Office® 2013. You can use the Unity Client to easily upload, organize, and retrieve documents.

## Exclusive Features

The OnBase Unity Client contains features that are not found in other OnBase clients. These features include:

- Ribbons
- Task panes
- A configurable homepage
- A configurable Favorites list
- List grouping and sorting
- Import preview
- An integrated audio and video viewer

## Applications

The OnBase Unity Client is the OnBase integration platform of the future. It:

- Simplifies OnBase access, promoting ease-of-use by presenting OnBase features and functions where users expect to find them.
- Increases adoption and minimizes training and support costs by leveraging user-familiarity with Microsoft Office 2013 products.
- Improves worker productivity by providing a personalized, task-centric interface with integrated functionality.
- Saves deployment time, effort, and costs through rapid rollout and upgrades using Microsoft's ClickOnce technology.

## Licensing

A Unity Client Server license is required to use the OnBase Unity Client. A valid Concurrent Client, Workstation Client, or Named User Client license is also required.

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

# 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.

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

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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.

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**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.

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## AutoFill Keyword Set

AutoFill Keyword Sets are used to automate and standardize data entry. The following apply to AutoFill keyword sets:

- 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 this 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.

Changing a parent Keyword Value does not update the child values that depend on it. For example, if you change the State after selecting the County, then the County retains its original value and is not automatically updated to reflect the new State.

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**Note:** OnBase cannot validate Keyword lengths for externally filled Keyword data sets, but externally filled Keyword data sets must still respect the configured Keyword lengths of the Keyword Types in OnBase.

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## 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 email 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 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.

## 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 Type Group

A Document Type Group represents a logical grouping of Document Types in the database.

Document Type Groups allow the system to organize, search for, and locate a document more efficiently.

Document Type Groups also provide a means of applying customized archival and security characteristics to a group of Document Types. For example, certain User Groups can be restricted from accessing a group of Document Types by configuring specific user group characteristics. Other characteristics can be configured to restrict the method of retrieval available to the Document Type, for example, from the connected database or a third-party system.

Document Type Groups contain Document Types that have common characteristics. For example, the Document Types of Health Records and Insurance Documents could be grouped together under the Document Type Group of Patient Information.

## 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, removing a document from an envelope will not delete the document from OnBase.
- 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

See also: [Internal Text Search Definition on page 13](#)

## 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.

## 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 containing Keyword Values not matching the folder Keyword Values can be added manually. If a folder is dynamic only, documents cannot be manually placed in or removed from the folder from within OnBase.

- You can drag documents from outside of OnBase into a folder.

Documents imported using this method can be automatically indexed with the dynamic folder's Keyword Values, provided that the folder's Keyword Types also exist on the Document Type. You can change these values in the **Import Document** dialog box, but if you change a Keyword Value the folder uses to dynamically store the document, then the document will not be dynamically stored in the folder. If the folder can contain static contents, then the document will be statically stored in the folder.

## 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, 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.
- You can drag documents from outside of OnBase into a folder using the OnBase Client.

Documents imported using this method can be automatically indexed with the static folder's Keyword Values, provided that the folder's Keyword Types also exist on the Document Type.

- Documents residing in a static folder do not have to share the same Document Type or Keyword Values.

## 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**.

## 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 11](#).

## 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.

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**Note:** OnBase cannot validate Keyword lengths for externally filled Keyword data sets, but externally filled Keyword data sets must still respect the configured Keyword lengths of the Keyword Types in OnBase.

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## 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 can be configured to have associated Keyword Types. For example, a **Check Images** Document Type may have Keyword Types such as **Account #**, **Check Serial #**, and **Amount** 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.

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**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.

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

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## 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.

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**Note:** Currency keyword values are limited to 15 characters in length.

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- 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.

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**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.

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

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**Note:** Depending on your system's configuration, certain Keyword Types may be subject to value validation rules.

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## 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 instance (unlike Keywords that are not part of a Keyword Type Group, which can contain multiple instances with different values). To allow multiple instances of the Keyword Types contained within a Keyword Type Group, the Keyword Type Group must be a Multi-Instance Keyword Type Group. Multi-Instance Keyword Type Groups can contain multiple instances of a Keyword Type Group, much like there can be multiple instances of a standard Keyword. Each instance of a Multi-Instance Keyword Type Group contains its own instances of the Keyword Types contained within the group, which can have different values between Keyword Type Groups.

For information about using Keyword Type Groups on folders, see the section on working with folder keywords.

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 Keyword Type Groups can be created for the document.

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

Multi-Instance Keyword Type Groups are displayed in an expanded state when OnBase is in an indexing mode. Multi-Instance Keyword Type Groups are also displayed in an expanded state when creating a new folder in the OnBase Client. Other instances can be configured to display the Keyword Values in the Keyword Type Groups either expanded or collapsed.

## Keyword Type Masking

Keyword Type masking sets a specific format for a Keyword Type which affects the way you work with Keyword Values in OnBase.

Keyword Type masking serves two purposes. The first is to set a specific format for a Keyword Type, allowing for more efficient indexing and retrieval. Once a mask is defined for a Keyword Type, OnBase will validate that the Keyword Value entered matches the mask for that Keyword Type. If the Keyword Value does not match the mask for that Keyword Type, OnBase will display an error message stating that the value is invalid.

Keyword Type masking can also be used for security purposes when displaying certain alphanumeric Keyword Types. When this kind of Keyword Type mask is configured, a portion of the alphanumeric Keyword Type, or the entire alphanumeric Keyword Type, is hidden by the configured mask. For example, a social security number Keyword Type is configured so all but the last four digits of each social security number are masked by the \* character. In this example, a user viewing a social security number in OnBase would see \*\*\*\*\*6789 instead of the actual Keyword Value stored in OnBase, 123-45-6789.

## Note

A note is an explanation or instruction that can be attached to text 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 on a text 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.

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**Caution:** If an image document, or page is dragged-and-dropped into another image document, then all notes associated with the first document/page are lost. However, if an image document is appended to an existing image document during indexing via matching Keyword Values, then any notes on that document/page are retained once it is appended to the existing document.

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Notes are displayed on all renditions of a document.

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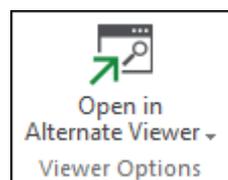
**Note:** A note has a maximum character length of 250 characters. If a note appears truncated, it is because the note has been configured to use variable text. The variable text is causing the note to exceed the maximum character length of 250 characters. If you are experiencing truncated notes, contact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

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## 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.

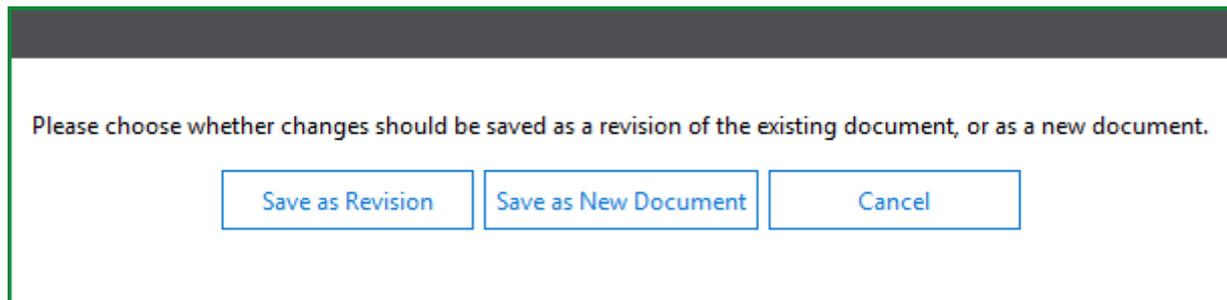
When you open an OLE document in OnBase, the document is displayed in a viewer based on the document's source application. If the **Open in Alternate Viewer** button is available, you can view documents using the Office Business Application. Note that if you are viewing an older document (.doc instead of .docx), the document is read-only.



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 by right-clicking the document's information bar.

When you have modified a revisable OLE document, upon saving in the source application, a dialog box is displayed asking whether you want to save the changes as a revision of the existing document, or create a new document.



Select the desired option, or click **Cancel** to exit the dialog box.

## 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

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

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

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

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**Tip:** The **Staple** window can also be viewed in the Notes list on the **Document Information Panel** of an open document.

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When using Staples, consider the following:

- The Staple icon and **Staple** window are placed on the primary document, and a Back Staple icon and **Back Staple** window are placed on secondary documents.
- For documents consisting of multiple revisions, Staple icons appear on all revisions. When viewing a stapled document from any revision of an open document, the latest available revision of the stapled document is displayed.
- When viewing a stapled document from its associated document, the stapled document is opened to the page on which the Staple was placed.

- When a Staple on a document is deleted, the corresponding Staple on the stapled document is not deleted. The corresponding Staple on the stapled document must be deleted separately.
- When printing a document, Staple icons will not be printed when selecting **Note Icon/ Annotation on Document** in the **Print Settings**.

## 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.

## General Functionality

The following sections describe general functionality available in the OnBase Unity Client. For specific functionality regarding other license-based modules, see their respective help files.

### Opening the Unity Client

The Unity Client can be opened by double-clicking the Unity Client executable or a desktop shortcut to it.

Depending on your deployment, you can access it by entering the URL path to the deployment application or by clicking the shortcut to it, if one has been created. When the module is deployed and activated, you are prompted for your logon credentials. After the application has been deployed the first time, it can also be accessed from the Windows **Start | All Programs | Hyland** menu.

When the Unity Client is installed by deploying the installation package to your machine using the URL or UNC path provided to you:

1. Launch the deployment package by opening the URL or UNC path to the **UnityClient<package>.application** file, where **<package>** is the name of your specific deployment package.
2. If the **Publisher cannot be verified** dialog box is displayed, confirm that the **Name** is **Hyland Unity Client** and the **From** matches the path and file name you were provided.
3. Click **Install**.
4. The Unity Client is installed. After installation, the logon dialog box is displayed.

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**Note:** When the installation package is modified by your system administrator, you are prompted to install a new version of the Unity Client.

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### Logging On

After you launch the module, the login dialog box is displayed.

1. Enter the required information:

Field	Description
	Select the data source to connect to from the drop-down list. <b>Note:</b> This field is displayed only when multiple data sources are available.
	Type your OnBase user name.
	Type your OnBase password.

2. Depending on your configuration and the module being used, the **Remember me on this computer** check box may be displayed. Selecting this check box stores your login credentials. The OnBase user name and password you provide will be used for subsequent login attempts.

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**Note:** If you store your login credentials using the **Remember me on this computer** check box, clicking the Application button and selecting **Log Out** clears these stored credentials. You will be required to provide your OnBase user name and password the next time you log on.

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3. Click **Login** to log on, or click **Cancel** to close the dialog without logging on.
4. If the Application Server that you are connecting to is initializing, an initializing message is displayed until the Application Server is ready:
5. If any **System Notifications** are available, they are displayed after login. The **Effective Date** is shown above each message. Click **OK** when you are finished reading the notifications.

After logging on to OnBase, these same login credentials may be reused when opening subsequent Unity-based modules. This allows you to move between modules without needing to login. When the same login credentials are being reused, the OnBase login dialog box is displayed while you are automatically logged on.

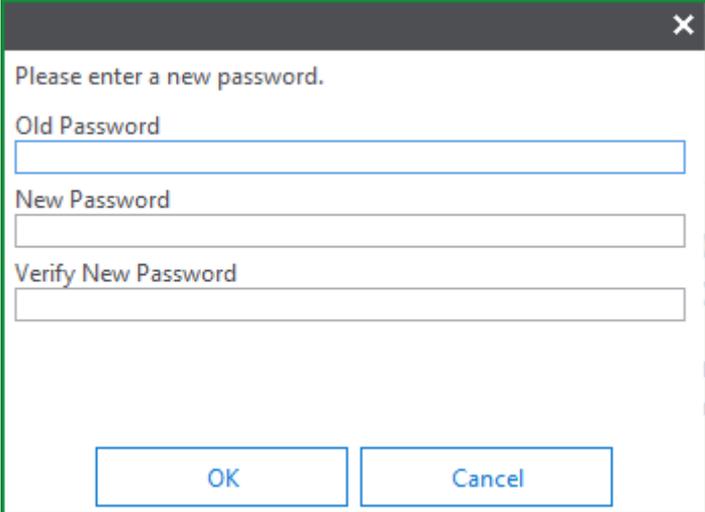
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**Note:** Login credentials are only reused when Unity-based modules share the same service path and data source configuration.

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## Change Password

Depending on how your system is configured, you may be prompted to change your OnBase login password when logging on. You also may have the ability to change your password after logging on.



Please enter a new password.

Old Password

New Password

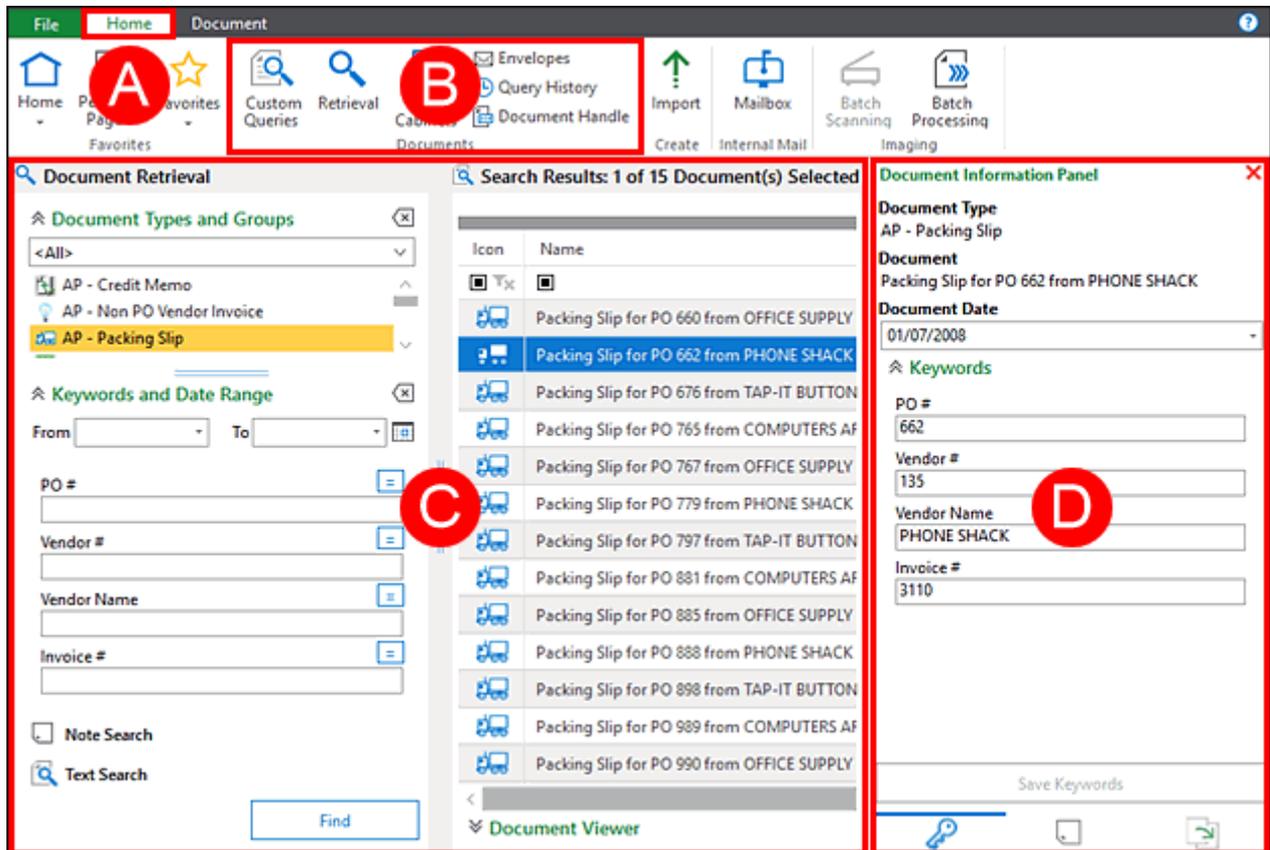
Verify New Password

OK Cancel

1. Type your current password in the **Old Password** field.  
All keystrokes display as dots to maintain security.
2. Type your new password in the **New Password** field.
3. Re-type your new password in the **Verify New Password** field.
4. Click **OK** to save. Click **Cancel** to exit without changing your password.

## The Unity Client Window

The OnBase Unity Client window has three primary regions: Layout, Ribbon, and Task Pane. The following screen shot displays each region.



The letters displayed in the screen shot above correspond to the letters in the following table, where each region of the screen is explained in detail.

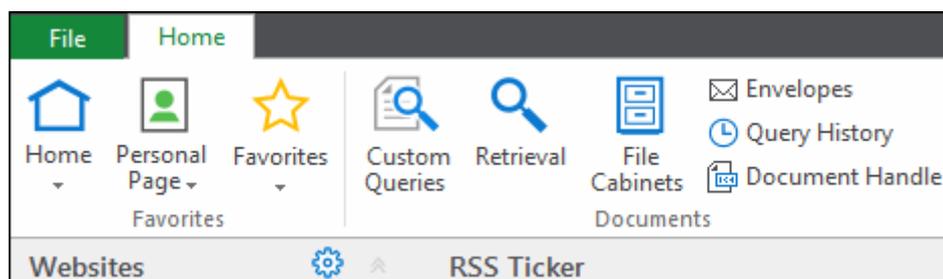
Region	Description
<b>A   Tabs</b>	You can use tabs to navigate between different layouts in the Unity Client. Tabs are displayed at the top of the Unity Client window.

Region	Description
<b>B   Ribbon</b>	<p>The contextual ribbon displays available user actions based on the currently displayed layout. A ribbon is displayed by clicking the corresponding tab. Each ribbon is divided into ribbon groups.</p> <p>In the above screen shot, the <b>Home</b> tab is displayed. This tab is available after logging on. The <b>Home</b> tab is divided into ribbon groups. Ribbon groups are categories of user actions.</p> <hr/> <p><b>Note:</b> You can minimize the ribbon by right-clicking the ribbon and selecting <b>Minimize the Ribbon</b>. After minimizing the ribbon, you can maximize it by right-clicking and selecting this same option. Your selection is persisted across OnBase sessions.</p> <hr/> <p><b>Note:</b> Some items on the ribbon may display a notification icon. This is to indicate that there are attachments or new items associated with the action on which it is displayed.</p> <hr/>
<b>C   Layout</b>	Each screen in the OnBase Unity Client is a layout. Default layouts are included with the OnBase Unity Client.
<b>D   Task Pane</b>	The task pane is displayed dynamically, based on a user action. For example, clicking the <b>Keywords</b> button displays the <b>Add/Modify Keywords</b> pane. Typically, the task pane is used to display some information that can be referenced briefly and then closed. It is also used for tasks such as adding documents to an envelope, displaying a document's keywords, notes, and cross-references, or managing Favorites and query history.

Windows within the Unity Client can be resized and repositioned as needed. Your adjustments are persisted across OnBase sessions.

## Home Tab

The **Home** tab is displayed after logging on to OnBase:

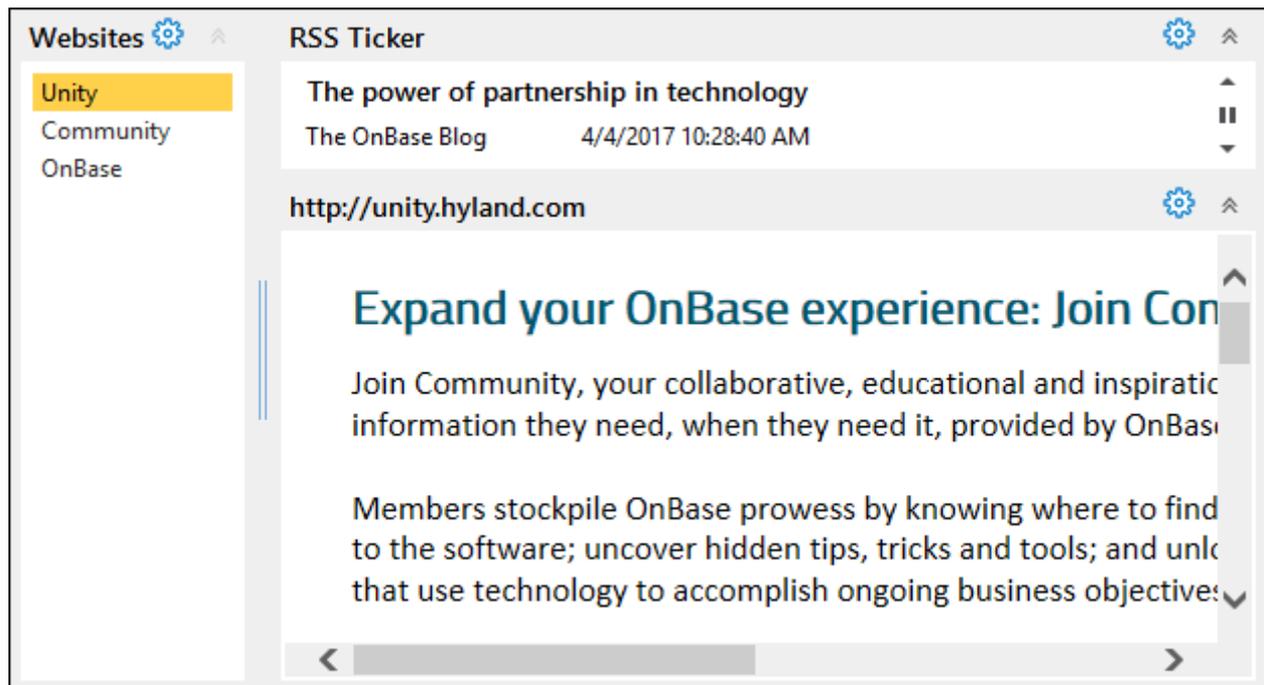


This tab provides access to common OnBase operations, such as Document Retrieval and Custom Queries. Depending on your licensing, the **Home** tab may also contain buttons to access other OnBase modules such as Workflow.

When the **Home** tab is selected, the layout that you have configured as your Home Page is displayed. The default layout that is displayed is the **Home** layout. This layout is described in the following section.

## Home Layout

Depending on your configuration, the **Home** layout may be displayed after logging on.

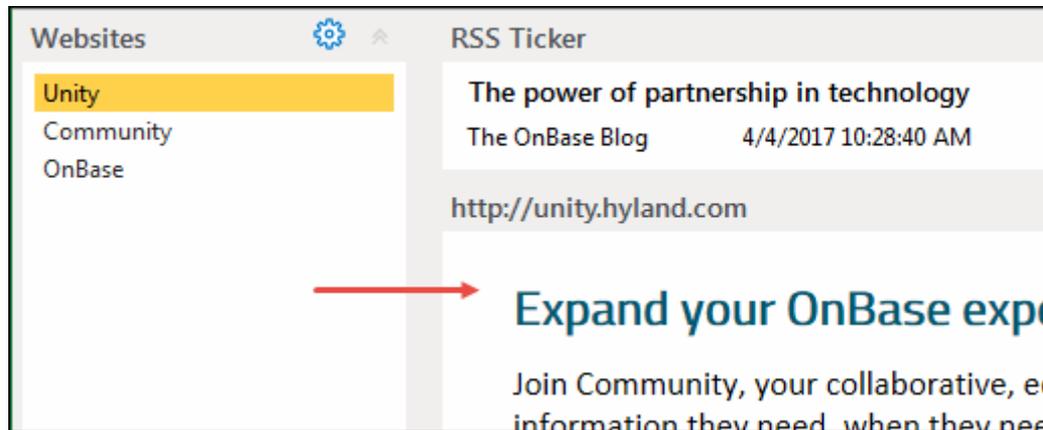


You can return to the **Home** layout at any time by clicking **Home** on the **Home** tab. If you configured a different layout to be your **Home** layout, you can return to the **Home** layout by clicking **Home** on the **Home** tab and selecting **Reset Home Page**.

The **Home** layout is divided into three panes, described in the following sections.

## Web Sites

The **Web Sites** pane contains a list of web sites. When you select a web site from the list, it is displayed in the corresponding pane. Web sites can be opened in a new browser window by right-clicking and selecting **Open in New Window**.



To add or remove web sites from this list, click the gear icon in the **Web Sites** pane:

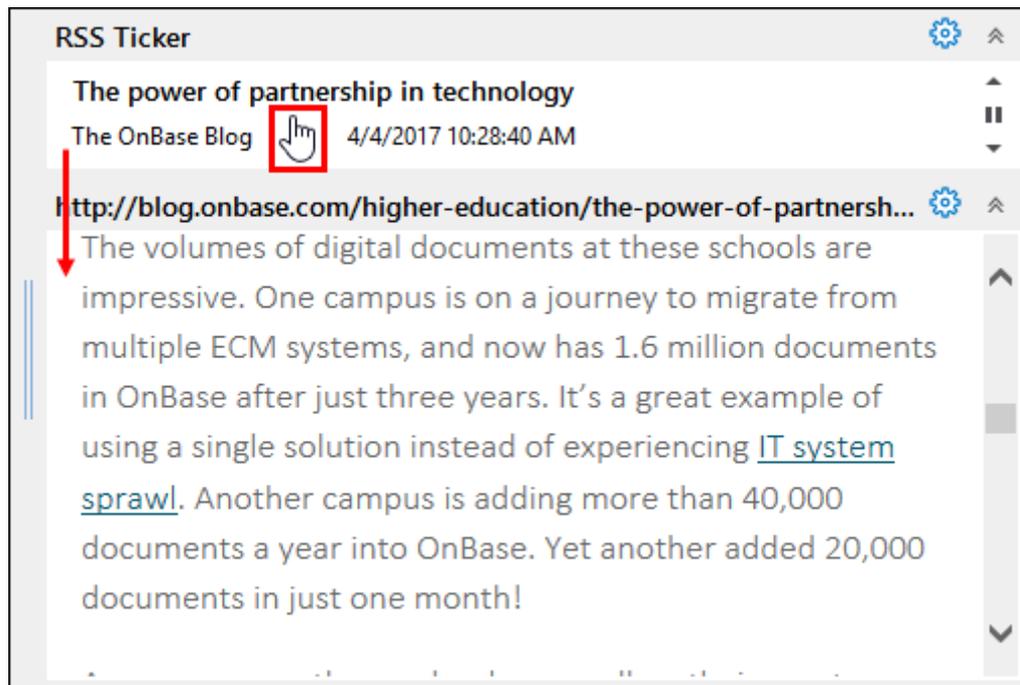


Click **Add New** to add a new web site to the list. The full website URL is required (including `http://` or `https://`). For example, `http://www.example.com`.

Select an existing site and click **Remove** to remove a web site from the list.

## RSS Ticker

The **RSS Ticker** pane displays information retrieved from the RSS or Atom feeds to which you are subscribed. When you select an item from the list, it is displayed in the corresponding pane:



You can use the following buttons in the **RSS Ticker** pane:

Button	Description
	Click to move forward in your RSS or Atom feeds.
	Click to pause the RSS Ticker. Click the following button to resume: 
	Click to move backward in your RSS or Atom feeds.

To add or remove web sites from this list, click the following icon in the **RSS Ticker** pane:



Type the address of a new RSS or Atom feed in the text field and click **Add** to add a new RSS or Atom feed. Select an existing RSS or Atom feed and click **Remove** to remove an RSS or Atom feed.

To modify the frequency with which your RSS or Atom feeds are updated, select an update frequency (in minutes) from the **Update Frequency (Minutes)** drop-down list.

To modify the number of RSS or Atom feed items that are displayed, select a number from the **Number of Feed Items** drop-down list.

## File Menu

The **File** menu is used to open previously used layouts and access administrative functionality. Depending on your configuration and rights, the **File** menu may contain:

Button	Description
<b>Open In New Window</b>	Click to open the current layout in a new window.
<b>Troubleshooting</b>	<p>Click to select from the following:</p> <ul style="list-style-type: none"> <li>• <b>Troubleshooting</b> - Click to view the Troubleshooting layout.</li> <li>• <b>Request Profile Diagram</b> - Click to show the Request Profile Diagram layout.</li> </ul> <hr/> <p><b>Note:</b> See the Troubleshooting Within the Unity Client topic in the Unity Client help files for more information.</p> <hr/>
<b>User Options</b>	Click to configure user options in the <b>User Options</b> dialog box.
<b>Administration</b>	<p>This menu displays rights-based, permissions-based, and license-based administration and configuration modules.</p> <ul style="list-style-type: none"> <li>• <b>User Administration</b> - Click to perform user administration from the <b>User Administration</b> layout.</li> </ul> <hr/> <p><b>Note:</b> See the User Administration topic in the Unity Client help files for more information.</p> <hr/> <ul style="list-style-type: none"> <li>• <b>Manage Locks</b> - Click to manage document, Disk Group, or process locks using the <b>Manage Locks</b> dialog box.</li> </ul> <hr/> <p><b>Note:</b> See the Managing Locks topic in the Unity Client help files for more information.</p> <hr/>
<b>Change Password</b>	<p>Click to change your OnBase password.</p> <hr/> <p><b>Note:</b> See the Change Password topic in the Unity Client help files for more information.</p> <hr/>
<b>Recent Activities</b>	Select one of your recent activities from the list to return to that layout.

Button	Description
<b>Help</b>	<p>Click to select from the following:</p> <ul style="list-style-type: none"> <li>• <b>Help</b> - Click to open the Unity Client help files.</li> <li>• <b>About OnBase</b> - Click to open the <b>About</b> screen. Here you can find the version of OnBase you are running and the associated Copyright information.</li> </ul> <p>From this screen, you can also view <b>Connection Information</b> such as <b>FriendlyName</b>, <b>Data Source</b>, and the <b>App Server URL</b>.</p>
<b>Log Out</b>	<p>Click to log off and log back in as a different user.</p> <p>If you stored your log on credentials using the <b>Remember me on this computer</b> check box, clicking this button clears these stored credentials. You will be required to enter your OnBase user name and password the next time you log on.</p>
<b>Exit OnBase / Close Window</b>	<p>The appearance of the <b>Exit OnBase</b> or <b>Close Window</b> buttons depends on whether or not Service Mode is enabled.</p> <p>While in Service Mode, click <b>Close Window</b> to close the Unity Client window.</p> <hr/> <p><b>Note:</b> Closing the main client window while in Service Mode closes the embedded document viewer. You will be prompted to save any changes before closing.</p> <hr/> <p>While in Service Mode, click <b>Exit OnBase</b> to log off and exit the OnBase Unity Client.</p>
<b>Re-launch Client</b>	<p>The <b>Re-launch Client</b> button is only available in Service Mode.</p> <p>Click <b>Re-launch Client</b> to restart the client. The client is closed, updates are applied, and the client is then reopened.</p>

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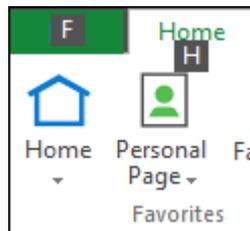
**Note:** The ADMINISTRATOR user, MANAGER user, and users that are part of a User Group with the **Usergroup Security** or **User Configuration** Configuration Right also have access to the **OnBase Community** button. Click this button to open the Hyland Community web site in your web browser.

---

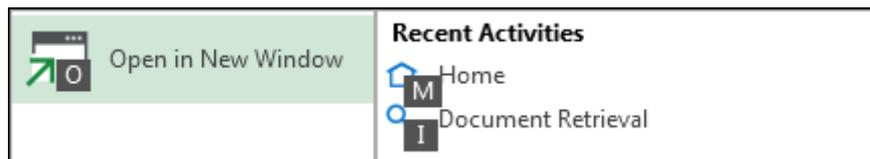
## Accessing Keyboard Shortcuts

Keyboard shortcuts allow you to quickly change layouts and perform actions without using your mouse. To discover an action's shortcut, use the **Alt** key. For example, the following steps describe how to learn shortcuts for tasks available from the **Home** tab.

1. On the **Home** tab, press **Alt**. Shortcut keys are displayed for the ribbon tabs and **File** menu:

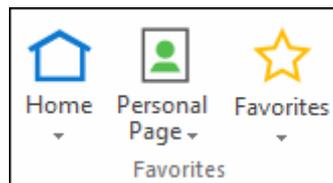


2. Press **F** to access the **File** menu and display its shortcut keys.



## Favorites

The **Favorites** group is used to open and configure your home layout and favorites:



The following buttons are available:

Button	Description
<b>Home</b>	<p>Click to go to your <b>Home</b> layout.</p> <p>For more information, see <a href="#">Using Your Home Page on page 24</a>.</p> <p>When you click the bottom part of this button, the following options are available:</p> <ul style="list-style-type: none"> <li>• <b>Make this layout my Home Page</b> - Click to make the currently displayed layout your <b>Home</b> layout.</li> <li>• <b>Reset Home Page</b> - Click to reset the layout that is displayed as your <b>Home</b> layout to the default.</li> </ul>

Button	Description
<b>Personal Page</b>	<p>Click to go to your <b>Personal Page</b>.</p> <p>For more information, see <a href="#">Personal Page on page 28</a>.</p> <p>When you click the bottom part of this button, the following option is available:</p> <ul style="list-style-type: none"> <li>• <b>Add this layout to my Personal Page.</b> - Click to add a Unity Client layout to your Personal Page.</li> </ul>
<b>Favorites</b>	<p>Click to display Favorite layouts and the following options:</p> <ul style="list-style-type: none"> <li>• <b>Manage my favorites</b> - Click to open the <b>Manage my favorites</b> task pane.</li> <li>• <b>Add this layout to my favorites</b> - Click to add the current layout to your favorites.</li> <li>• Layouts already added as favorites</li> </ul> <p>For more information on Favorites, see <a href="#">Using Your Favorites on page 25</a>.</p>

## Using Your Home Page

The Unity Client **Home Page** is the layout that is automatically shown upon opening the Unity Client. The Home Page can be changed to suit your needs.

To access your Home layout, click the **Home** button:



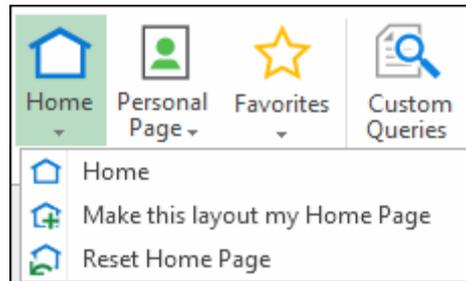
## Setting Your Home Page

Most layouts, including designated WorkView Applications, can be made your Home layout. Your Home Page selection is saved in the database.

To set your Home Page:

1. Navigate to the desired layout.
2. With the layout active and displayed, click the **Home** tab.
3. Click the bottom portion of the **Home** button.

4. Select **Make this layout my Home Page**.

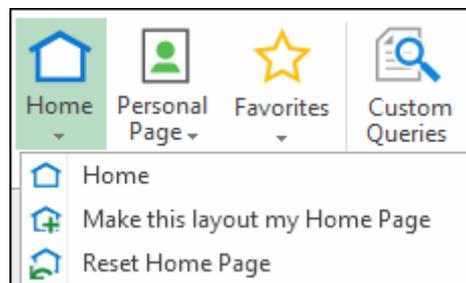


The layout will now be displayed when opening the Unity Client or when the Home button is clicked.

## Resetting Your Home Page

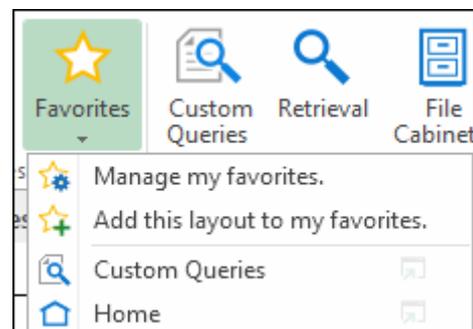
Your Home Page can be reset to the default layout set by your system administrator. To reset your home page:

1. Click the bottom portion of the **Home** button.
2. Select **Reset Home Page**.



## Using Your Favorites

Favorites give you the ability to save frequently used layouts in an easily-accessible area in the ribbon menu. Clicking the **Favorites** button displays your favorite layouts in alphabetical order. This button persists across all layouts that use the ribbon menu.



## Adding a Favorite

To add a layout to your Favorites:

1. Navigate to the desired layout. Ensure that the layout you wish to favorite is in the current window.
2. Click **Favorites | Add this layout to my favorites**. Your selected favorites are saved in the database.

---

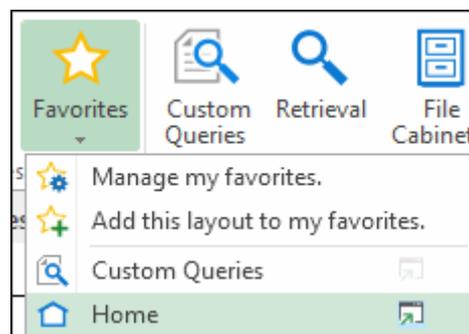
**Note:** If a layout has already been added to your Favorites, the **Add this layout to my favorites** button will be changed to say **This layout is already in my favorites**.

---

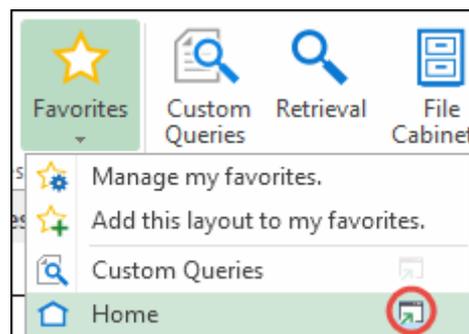
## Opening a Favorite

Favorite layouts can be opened to two locations: in the current window or in a new window.

To open a Favorite in the **current window**, click anywhere on the layout name:

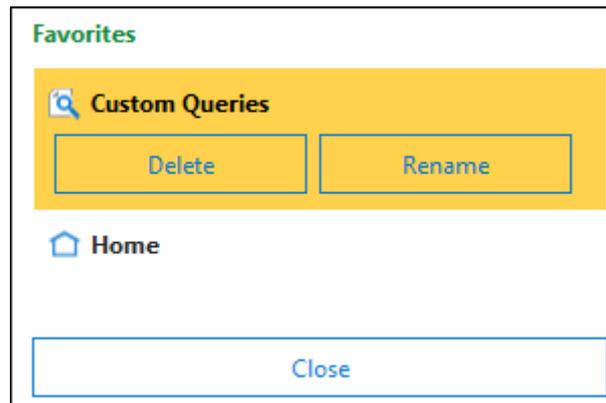


To open a Favorite in a **new window**, click the **Open in New Window** button:



## Managing Your Favorites

Clicking the **Manage my favorites** option opens the **Manage my favorites** task pane:



This task pane lists the layouts that have previously been defined as favorites. These layouts are displayed in alphabetical order. When a favorite layout is selected, the **Delete** and **Rename** buttons are available.

### Renaming Favorites

Upon adding a layout to your Favorites, a default name is given to the layout. This name can be changed to better suit your needs. To rename a Favorite:

1. Click **Favorites | Manage my favorites**.
2. Select a Favorite and click **Rename**.
3. The name is now editable:



Change the name of the Favorite layout as needed.

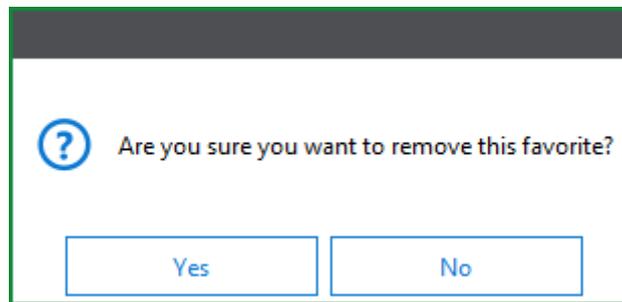
4. Press **Enter** to save the new name.

### Deleting Favorites

Layouts can be removed from your Favorites by deleting them. To delete a favorite:

1. Click **Favorites | Manage my favorites**.
2. Select a Favorite and click **Delete**.

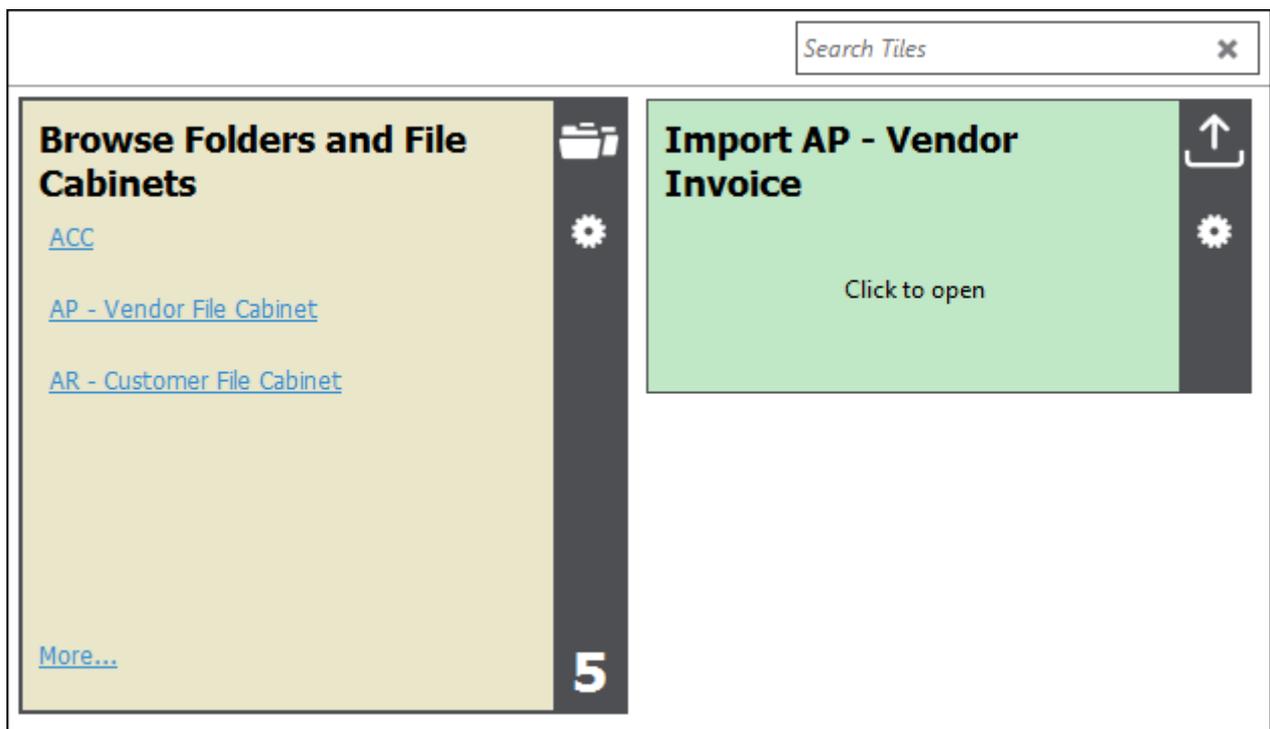
3. Click **Yes** when asked if you would like to remove the Favorite:



## Personal Page

### Using Your Personal Page

Your Personal Page gives you the ability to access shortcuts and frequently used features from one single page:



---

**Note:** The **Personal Page Configuration** privilege is needed to add, edit, and delete items on the Personal Page. For additional information, contact your system administrator.

---

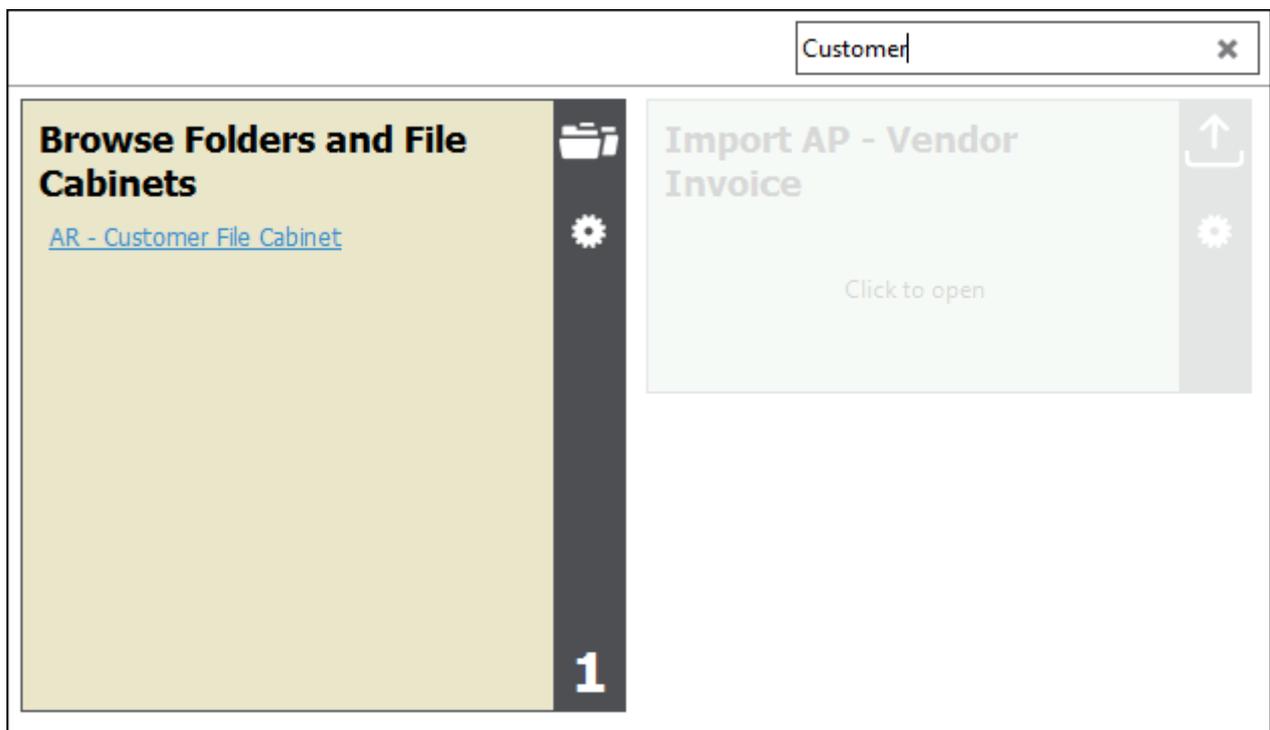
OnBase features that you have added to your Personal Page are represented as tiles. Numeric values in the bottom right corner represent the number of items in the tile. For example, in the above screen shot, the **Browse Folders and File Cabinets** tile contains **5** forms. Tiles are also represented by different colors, which are customizable.

- You can move tiles by clicking and dragging them.
- Some tiles can be refreshed by clicking the **Refresh** icon on the tile:



- To rename an existing tile, right-click it and select **Rename Tile**. Enter a new name for the tile and click **OK**.
- To change a tile's color, right-click it and select **Pick Color**. A box containing color options is displayed. Click to select the color of your choice. The tile will now display your selected color.

To search tiles, type a term in the **Search Tiles** field. Tiles that contain terms matching your search criteria remain in focus with matching terms displayed. Tiles that do not contain terms matching your search criteria are faded out and only tile contents that match your search criteria are visible:



To clear search criteria, click **Clear**.

## Administrative Tiles

Tiles may be assigned to you by administrators. Required tiles will be displayed in their own section at the top of your Personal Page. The tiles that you add or modify yourself are displayed in the **My Tiles** group. Changes made by administrators to the enforced tiles will be shown in your Personal Page upon refreshing the layout.

### Editing Administrator Suggested Tiles

Administrator Suggested Tiles can be edited or deleted like any other tile on the Personal Page.

Changing the name, title, description, and color of the tile will retain the connection to the original Administrator Suggested Tile. When the administrator updates the tile, the tile on your Personal Page will be updated accordingly. However, if you change the configuration of a tile (such as when you change the search criteria for a **Custom Query Results** tile) or delete the tile, the connection to the original Administrator Suggested Tile is broken. When an administrator updates that tile, you will receive a new tile with the new configuration and, if it hasn't been deleted, the tile you originally edited will remain on your Personal Page.

Changes you make to Administrator Suggested Tiles on your Personal Page do not impact other users.

## Adding Items to Your Personal Page

The following can be added to your Personal Page:

- OnBase Layouts
- Documents
- Folders
- Custom Queries
- Custom Query Results
- Document Knowledge Transfer Reading Groups
- Document Tracking folders and folder lists
- E-Forms/Unity Forms
- Full Text Search (Full-Text Indexing Server for Autonomy IDOL)
- Workflow queues (including load balanced queues)
- Workflow Combined Inboxes
- Internal Mailbox (with a list of unread messages)
- Individual Document Templates
- WorkView Applications, Filters, and Objects
- Import Tiles with specified Document Types
- Dashboards and Dashboard items

Generally, individual items and folders can be added to the Personal Page by right-clicking the item you wish to add and selecting the **Add To Personal Page** option.

See the following sections for information on adding different types of items to your Personal Page.

---

**Note:** Non-document Workflow queues cannot be added to your Personal Page.

---

**Note:** Document Knowledge Transfer Reading Group tiles will only show up to 50 documents. Tiles may show fewer than 50 documents depending on filter settings. To view all documents, click the Document Knowledge Transfer Reading Group tile header.

---

**Note:** Administrative layouts, which are available from the **File** menu, are not supported for addition to your Personal Page.

---

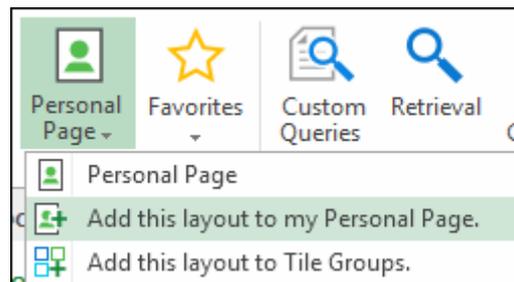
**Note:** Items that have been deleted are not automatically removed from your Personal Page. To manually remove Personal Page tiles, see [Removing Personal Page Tiles on page 35](#).

---

## Adding Layouts to Your Personal Page

To add a **Layout** to your Personal Page:

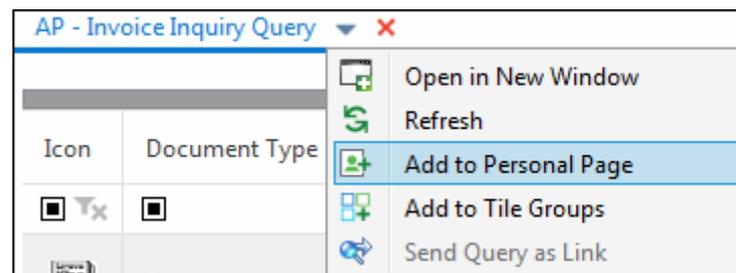
1. With the layout you wish to add to your Personal Page displayed, navigate to the **Home** tab and click the bottom part of the **Personal Page** button located in the **Favorites** group.



2. Click **Add this layout to my Personal Page**.

## Adding Custom Queries to Your Personal Page

To add a **Custom Query Results** tile to your Personal Page, select **Add To Personal Page** from the tabbed results page drop-down menu:



## Adding Documents to Your Personal Page

To add an open **Document** to your Personal Page:

1. Click the **Send To** button in the **Actions** group on the **Document** tab.



2. From the menu, select **My Personal Page**.
3. Documents in a hit list can be added to the Personal Page by right-clicking and selecting

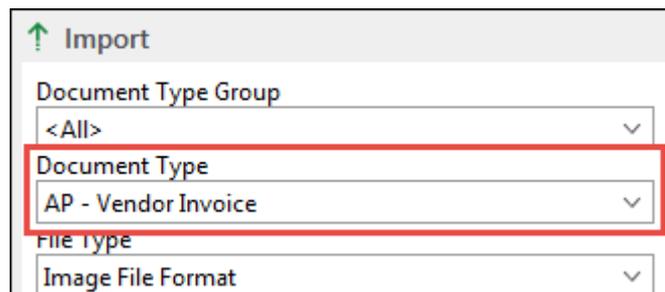
## Adding Import Tiles with Specified Document Types to Your Personal Page

To add an Import layout tile with a Document Type to your Personal Page:

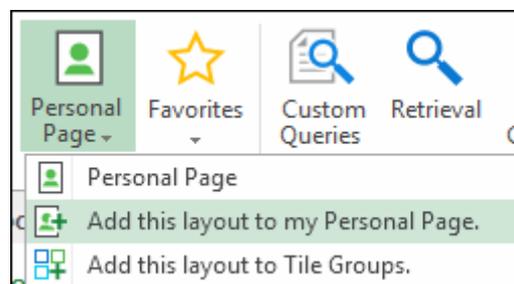
1. In the **Create** ribbon group, click the **Import** button.



2. The **Import** layout is displayed. Select a Document Type in the **Import** pane.



3. After a Document Type has been selected, navigate to the **Home** tab.
4. From the **Favorite** ribbon group, click the bottom portion of the **Personal Page** button.



5. Select **Add this layout to my Personal Page**.

- The tile is added to your Personal Page. The name of the tile reflects the Document Type specified.




---

**Note:** To add an Import tile without a specified Document Type, add the layout to your Personal Page before selecting a Document Type.

---

## Adding WorkView Filters and Objects to Your Personal Page

WorkView filters and objects can be added to the Personal Page. The same filter or object can be added to the Personal Page multiple times. Depending on layout view, there are multiple ways to add filters or objects to your Personal Page.

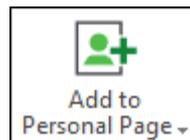
---

**Note:** WorkView filter tiles will only show 50 results.

---

To add a WorkView filter to your Personal Page:

With the filter you would like to add to the Personal Page open, click **Add to Personal Page** in the **Favorites** ribbon menu group.



The bottom part of the button also allows you to add the filter to your Personal Page by clicking **Add Filter to Personal Page**. Filters can also be added to the Personal page by right-clicking within the filter and selecting **Add to Personal Page | Add Filter to Personal Page**.

If any objects are selected, the **Add Object to Personal Page** portion of the **Add to Personal Page** button is available. Multiple objects can be added at once. Objects can also be added from the filter view by selecting the desired object(s) and selecting **Add to Personal Page | Add Object to Personal Page** from the right click menu.

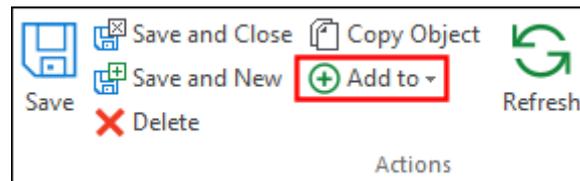
---

**Note:** If more than five objects are selected for addition to the Personal Page, you will be asked to confirm the action.

---

To add an open WorkView object to your Personal Page:

1. In an open object, click the **Add to** button in the **Actions** ribbon menu group.



2. Select **Add to Personal Page**.
3. The tile is added to your Personal Page.

## Opening A Layout or an Item from the Personal Page

To open a layout, you may either click the tile, or area of the tile. The feature is displayed in a new window.

To open an item in a tile, click the item in the list. The item is displayed in a new window.

---

**Note:** Clicking the title on a list tile opens the layout associated with the tile, not the items contained in that tile.

---

## Managing and Configuring Personal Page Tiles

To configure settings for a Personal Page Tile:

1. Click the **Configure** button on the tile you want to configure:



2. The **General Options** dialog box is displayed. The following configurable options are available:

Option Tab	Option	Description
General	Title	Modify the title that is displayed on the tile.
	Description	Modify the description that is displayed on the tile.
	Color	Modify the color of the tile displayed on the Personal Page.

When you are finished configuring the tile, click **Save** to save your changes. Click **Cancel** to cancel.

The following sections describe additional options that can be configured for some Personal Page tiles:

- [Custom Query Results Tiles on page 35](#)

## Custom Query Results Tiles

The following additional items can be configured on the Custom Query Results tile configuration screen:

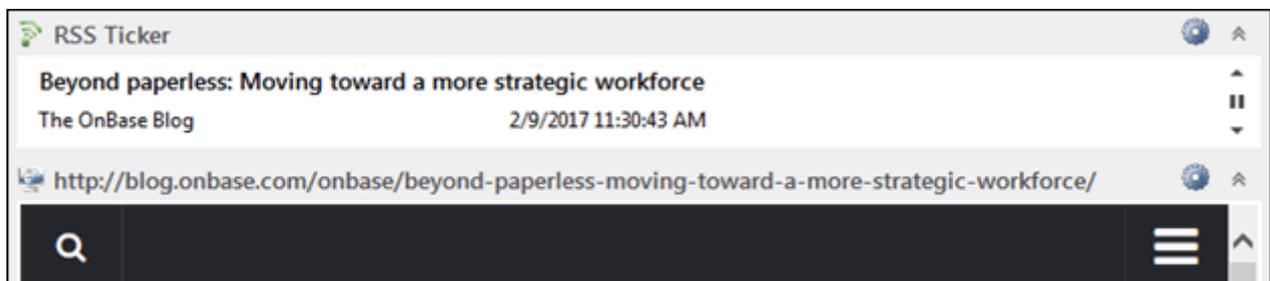
Option Tab	Description
<b>Custom Query</b>	<p>This screen allows you to modify the form field values that are used when returning the Custom Query result displayed on the tile. You can add, modify, or remove search terms.</p> <hr/> <p><b>Note:</b> You can include additional instances of a Keyword Type, or use Wildcard or Boolean operators to narrow the search.</p> <hr/> <p><b>Note:</b> To modify the form field values of an HTML Form Custom Query tile, a new tile with the updated form field values must be created.</p> <hr/> <p>When you are finished modifying form field values, click <b>Search</b> to run the Custom Query and validate the results. Click <b>OK</b> to confirm the results and return to your Personal Page.</p>

## Removing Personal Page Tiles

You can remove tiles from your Personal Page if you no longer want the tile, if you no longer have sufficient rights to the configured object, or if the configured object no longer exists. To remove a tile from your Personal Page, right-click it and select **Delete Tile**. Click **Yes** to remove the tile. Click **No** to cancel and keep the tile.

## Panes

Some layouts in OnBase consists of one or more panes. An example of a pane is shown below:



To minimize a pane, click the minimize button:



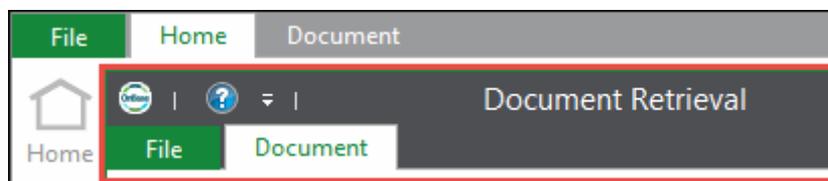
To maximize a pane that has been minimized, click the maximize button:



## Open in New Window

Multiple layouts can be open at the same time by opening additional layouts in new windows. To open the current layout in a new window, select **File | Open in New Window**.

The layout is displayed in a new window:




---

**Note:** The **Home** tab is not displayed in any new windows that you open. It is retained in the original window.

---

## Data Lists

Many layouts within the Unity Client contain lists to display data. Data lists can be customized to display information in ways that allow you to complete tasks more efficiently. Multiple items in data lists can be selected at the same time, data list columns can be reordered and stacked, and data list items can be grouped, sorted, and filtered.

Modifications to data lists are automatically saved to the OnBase database and persisted across sessions. To remove data list modifications and return to the default display, right-click in the data list and select **Clear Customizations**.

## Selecting Multiple Items

Many data lists within the Unity Client support selecting multiple data list items using the following keyboard shortcuts:

Keyboard Shortcut	Description
<b>Ctrl</b>	Hold and click to select multiple items in a list.
<b>Ctrl + A</b>	Press to select all items in a list.

Keyboard Shortcut	Description
<b>Ctrl + Shift + End</b>	Press to select all items below the selected item in a list, including the selected item.
<b>Ctrl + Shift + Home</b>	Press to select all items above the selected item in a list, including the selected item.

To select multiple consecutive items in a list, click an item and drag up or down.

## Reordering and Stacking Columns

Data list columns within the Unity Client can be reordered or stacked.

To reorder columns:

1. Click on a column header and drag it to its new location:

Search Results: 13 Document(s)

Icon	Name	Type	Date	Type
	Vendor Invoice 2440 for PO 990 from OFFICE SUPPLY WAREHOUSE in the amount of \$500.00	AP - Vendor Invoice	4/7/2008	
	Vendor Invoice 1330 for PO 881 from COMPUTERS ARE US in the amount of \$952.30	AP - Vendor Invoice	3/3/2008	
	Vendor Invoice 2330 for PO 885 from OFFICE SUPPLY WAREHOUSE in the amount of \$281.14	AP - Vendor Invoice	3/3/2008	
	Vendor Invoice 3330 for PO 888 from PHONE SHACK in the amount of \$1,110.00	AP - Vendor Invoice	3/3/2008	
	Vendor Invoice 4330 for PO 898 from TAP-IT BUTTONS, INC in the amount of \$1,437.50	AP - Vendor Invoice	3/3/2008	
	Vendor Invoice 1220 for PO 765 from COMPUTERS ARE US in the amount of \$854.40	AP - Vendor Invoice	2/4/2008	

2. Release the mouse button. The column header is displayed in its new location:

Search Results: 13 Document(s)

Icon	Name	Date	Type
	Vendor Invoice 2440 for PO 990 from OFFICE SUPPLY WAREHOUSE in the amount of \$500.00	4/7/2008	AP - Vendor Invoice
	Vendor Invoice 1330 for PO 881 from COMPUTERS ARE US in the amount of \$952.30	3/3/2008	AP - Vendor Invoice
	Vendor Invoice 2330 for PO 885 from OFFICE SUPPLY WAREHOUSE in the amount of \$281.14	3/3/2008	AP - Vendor Invoice
	Vendor Invoice 3330 for PO 888 from PHONE SHACK in the amount of \$1,110.00	3/3/2008	AP - Vendor Invoice
	Vendor Invoice 4330 for PO 898 from TAP-IT BUTTONS, INC in the amount of \$1,437.50	3/3/2008	AP - Vendor Invoice
	Vendor Invoice 1220 for PO 765 from COMPUTERS ARE US in the amount of \$854.40	2/4/2008	AP - Vendor Invoice

To stack columns:

1. Click on a column header and drag it onto the header of the column with which you want to stack it:

Search Results: 13 Document(s)

Icon	Name	Type	Date
	Vendor Invoice 2440 for PO 990 from OFFICE SUPPLY WAREHOUSE in the amount of \$500.00	AP - Vendor Invoice	4/7/2008
	Vendor Invoice 1330 for PO 881 from COMPUTERS ARE US in the amount of \$952.30	AP - Vendor Invoice	3/3/2008
	Vendor Invoice 2330 for PO 885 from OFFICE SUPPLY WAREHOUSE in the amount of \$281.14	AP - Vendor Invoice	3/3/2008
	Vendor Invoice 3330 for PO 888 from PHONE SHACK in the amount of \$1,110.00	AP - Vendor Invoice	3/3/2008
	Vendor Invoice 4330 for PO 898 from TAP-IT BUTTONS, INC in the amount of \$1,437.50	AP - Vendor Invoice	3/3/2008
	Vendor Invoice 1220 for PO 765 from COMPUTERS ARE US in the amount of \$854.40	AP - Vendor Invoice	2/4/2008

2. Release the mouse button. The columns' contents are stacked:

Search Results: 13 Document(s)

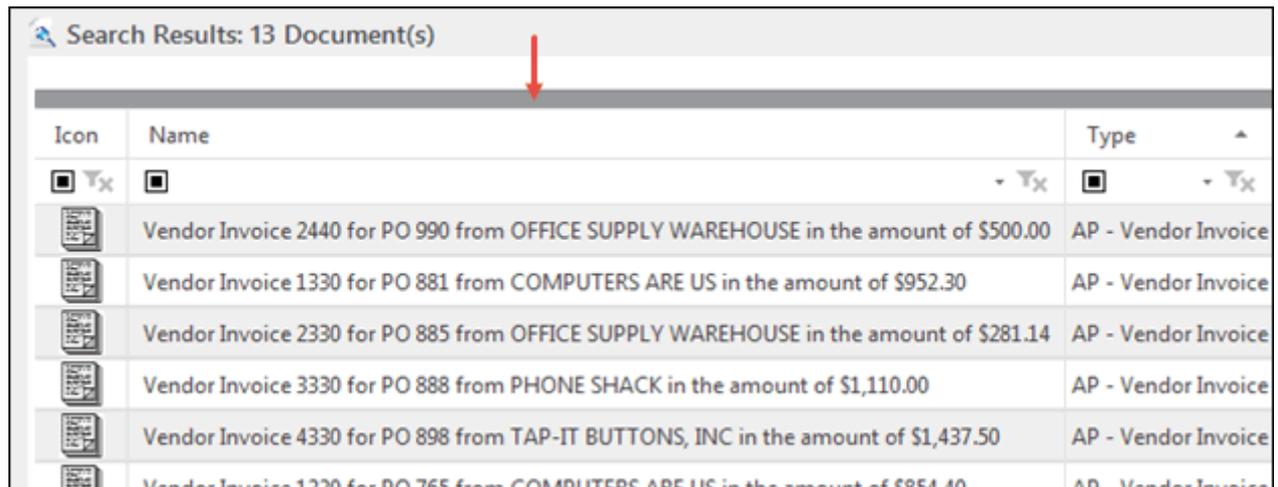
Icon	Name	Date
	Vendor Invoice 2440 for PO 990 from OFFICE SUPPLY WAREHOUSE in the amount of \$500.00	4/7/2008
		AP - Vendor Invoice
	Vendor Invoice 1330 for PO 881 from COMPUTERS ARE US in the amount of \$952.30	3/3/2008
		AP - Vendor Invoice
	Vendor Invoice 2330 for PO 885 from OFFICE SUPPLY WAREHOUSE in the amount of \$281.14	3/3/2008
		AP - Vendor Invoice
	Vendor Invoice 3330 for PO 888 from PHONE SHACK in the amount of \$1,110.00	3/3/2008
		AP - Vendor Invoice
	Vendor Invoice 4330 for PO 898 from TAP-IT BUTTONS, INC in the amount of \$1,437.50	3/3/2008
		AP - Vendor Invoice
	Vendor Invoice 1220 for PO 765 from COMPUTERS ARE US in the amount of \$854.40	2/4/2008
		AP - Vendor Invoice

## Grouping

Data lists within the Unity Client support multi-level grouping. Grouping is done client-side and does not incur a round trip to the database.

To group a data list:

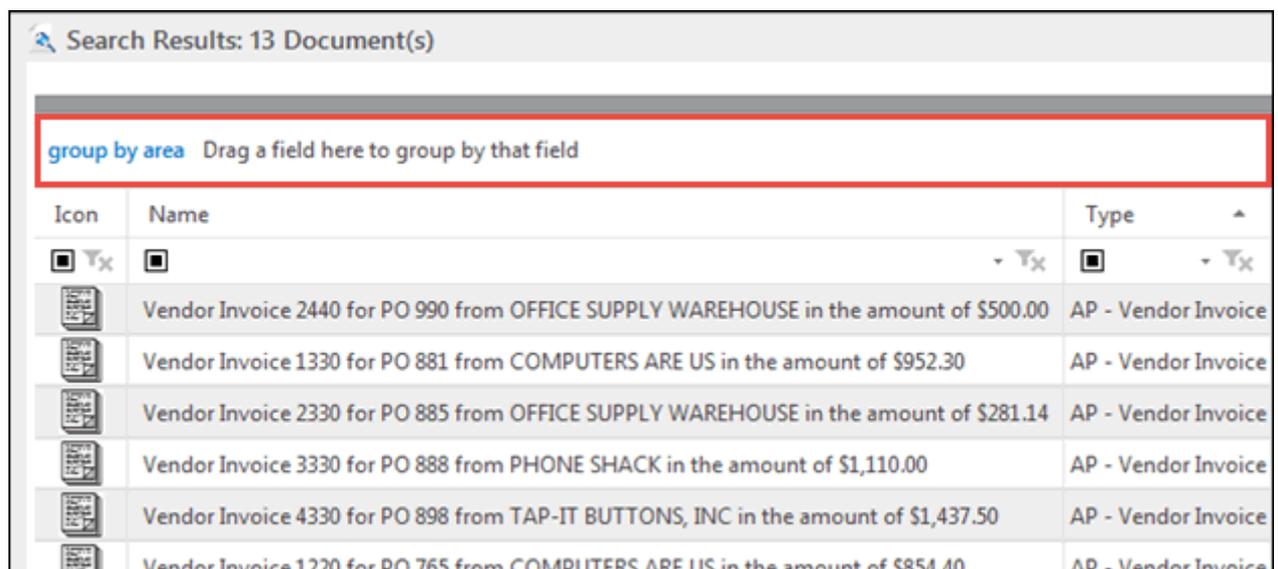
1. Click the bar above the column headers:



Search Results: 13 Document(s)

Icon	Name	Type
	Vendor Invoice 2440 for PO 990 from OFFICE SUPPLY WAREHOUSE in the amount of \$500.00	AP - Vendor Invoice
	Vendor Invoice 1330 for PO 881 from COMPUTERS ARE US in the amount of \$952.30	AP - Vendor Invoice
	Vendor Invoice 2330 for PO 885 from OFFICE SUPPLY WAREHOUSE in the amount of \$281.14	AP - Vendor Invoice
	Vendor Invoice 3330 for PO 888 from PHONE SHACK in the amount of \$1,110.00	AP - Vendor Invoice
	Vendor Invoice 4330 for PO 898 from TAP-IT BUTTONS, INC in the amount of \$1,437.50	AP - Vendor Invoice
	Vendor Invoice 1220 for PO 765 from COMPUTERS ARE US in the amount of \$854.40	AP - Vendor Invoice

2. The **group by area** is displayed:

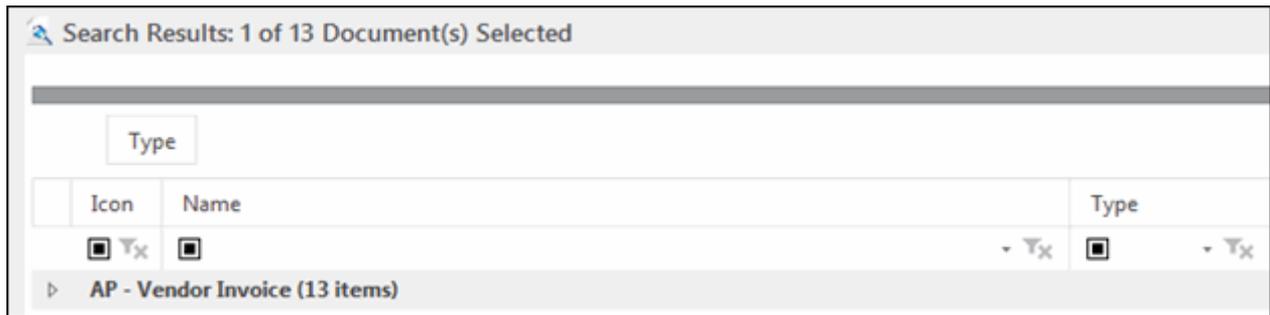


Search Results: 13 Document(s)

**group by area** Drag a field here to group by that field

Icon	Name	Type
	Vendor Invoice 2440 for PO 990 from OFFICE SUPPLY WAREHOUSE in the amount of \$500.00	AP - Vendor Invoice
	Vendor Invoice 1330 for PO 881 from COMPUTERS ARE US in the amount of \$952.30	AP - Vendor Invoice
	Vendor Invoice 2330 for PO 885 from OFFICE SUPPLY WAREHOUSE in the amount of \$281.14	AP - Vendor Invoice
	Vendor Invoice 3330 for PO 888 from PHONE SHACK in the amount of \$1,110.00	AP - Vendor Invoice
	Vendor Invoice 4330 for PO 898 from TAP-IT BUTTONS, INC in the amount of \$1,437.50	AP - Vendor Invoice
	Vendor Invoice 1220 for PO 765 from COMPUTERS ARE US in the amount of \$854.40	AP - Vendor Invoice

3. Select a column header and drag it into the **group by area** to group the data list by that column:



4. Continue selecting column headers and dragging them into the **group by area** to group the data list further.

## Sorting

Data lists within the Unity Client can be sorted in ascending or descending order by column. Sorting is done client-side and does not incur a round trip to the database.

To sort a data list by values in a column in ascending order, click on the column header. To sort the data list by the values in descending order, click the column header again.

## Filtering

Data lists within the Unity Client can be filtered using operators and drop-down select list options and by creating custom filters.

The following Unity Client layouts support filtering:

- Custom Queries
- Document History
- Document Retrieval
- Mailbox
- Users

---

**Note:** If you apply filtering to a Search Results list, the search results are updated to indicate the number of matching documents in the following format: **[number of matching documents] Document(s) matched of [number of documents returned by the original query] found.**

---

When working with filters, the following right-click options are available:

Option	Description
<b>Clear Customizations</b>	Select to remove column filtering and return to the default display.
<b>Toggle Column Filters</b>	Select to show or hide column filtering options in the layout. When you hide filtering options, applied column filters are removed.

Option	Description
<b>Clear All Column Filters</b>	Select to clear all applied column filters.

## Operators

Column filter operators are used to define how to apply a filter to a data list with regard to the value specified in the column's filter drop-down select list.

Operators are available by clicking the operator button:



Depending on the type of value the column contains, the following operators may be available:

Operator	Description
<b>Equals</b>	Values equal to the value specified in the corresponding drop-down select list are displayed.
<b>Not equals</b>	Values not equal to the value specified in the corresponding drop-down select list are displayed.
<b>Less than</b>	Values less than the value specified in the corresponding drop-down select list are displayed.
<b>Less than or equal to</b>	Values less than or equal to the value specified in the corresponding drop-down select list are displayed.
<b>Greater than</b>	Values greater than the value specified in the corresponding drop-down select list are displayed.
<b>Greater than or equal to</b>	Values greater than or equal to the value specified in the corresponding drop-down select list are displayed.
<b>Contains</b>	Any values containing the value specified in the corresponding drop-down select list are displayed.
<b>Does Not Contain</b>	Any values containing the value specified in the corresponding drop-down select list are not displayed.
<b>Top</b>	The top number of values specified in the corresponding drop-down select list are displayed. For example, when <b>Top</b> is selected and <b>2</b> is entered in the <b>ID</b> column drop-down select list in the <b>Users</b> layout, the two most recently created users are displayed.

Operator	Description
<b>Bottom</b>	The bottom number of values specified in the corresponding drop-down select list are displayed. For example, when <b>Bottom</b> is selected and <b>2</b> is entered in the <b>ID</b> column drop-down select list in the <b>Users</b> layout, the two users created first (ADMINISTRATOR and MANAGER) are displayed.
<b>Top percentile</b>	Values in the top percentile of the value specified in the corresponding drop-down select list are displayed.
<b>Bottom percentile</b>	Values in the bottom percentile of the value specified in the corresponding drop-down select list are displayed.
<b>Like (wildcards)</b>	Values like (including wildcards) the value specified in the corresponding drop-down select list are displayed.
<b>Not like (wildcards)</b>	Values that are not like the value (including wildcards) specified in the corresponding drop-down select list are displayed.
<b>Match (regular expression)</b>	Values that match (including regular expression) the value specified in the corresponding drop-down select list are displayed. For example, typing <b>A*M</b> in the <b>Name</b> column in the <b>Users</b> layout displays the MANAGER and ADMINISTRATOR user names, because both user names contain the letters <b>A</b> and <b>M</b> .
<b>Does not match (regular expression)</b>	Values that do not match (including regular expression) the value specified in the corresponding drop-down select list are displayed.
<b>Starts with</b>	Values that start with the value specified in the corresponding drop-down select list are displayed.
<b>Does not start with</b>	Values that do not start with the value specified in the corresponding drop-down select list are displayed.
<b>Ends with</b>	Values that end with the value specified in the corresponding drop-down select list are displayed.
<b>Does not end with</b>	Values that do not end with the value specified in the corresponding drop-down select list are displayed.
<b>In</b>	This option is intended for use with Reporting Dashboards. For more information, see the <b>Reporting Dashboards</b> module reference guide.
<b>Not In</b>	This option is intended for use with Reporting Dashboards. For more information, see the <b>Reporting Dashboards</b> module reference guide.

## Drop-Down Select Lists

In conjunction with column filter operators, column filter drop-down select lists are used to select or enter a value that defines how to apply a filter to a data list.

To select an option from a column's drop-down select list, click the drop-down arrow:

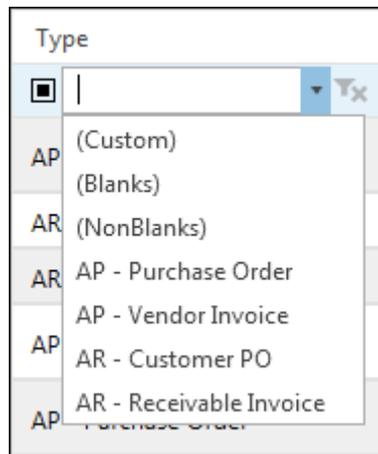


To enter a value in the drop-down select list, click to the left of the drop-down arrow and enter the value. The data list is filtered as you type.

The following options are available for selection from all drop-down select lists:

Option	Description
<b>(Custom)</b>	The <b>Custom Filter Selection</b> dialog box is opened, and a custom filter can be created. For more information, see <a href="#">Custom Filter Selection on page 44</a> .
<b>(Blanks)</b>	Blank values for the column are displayed.
<b>(NonBlanks)</b>	Any non-blank values for the column are displayed.

Each column's drop-down select list also contains all the unique values in the data list for that column. For example, in a Document Search Results list, the drop-down select list for the **Type** column lists the Document Types of the documents found during the search:



In addition to unique values in the data list, drop-down select lists may contain comparative or general options to filter by non-specific values. For example, the drop-down select list of columns containing numerical or date values may include comparative options, such as **Above Average** and **Bottom 10**. When a data list is filtered by these options, the only list items displayed are those whose value in the filtered column meets the criteria when compared with the values in that column for all items in the data list, regardless of filtering applied to other columns.

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**Note:** When comparative filter options are selected for columns with date values, **Top** refers to the most recent date and **Bottom** refers to the oldest date.

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For columns containing date values, the drop-down select list filter options may also contain relative and general options. For example, options such as **Yesterday** and **Next Month** are relative to the current date. Options such as **Quarter 1** and **January** are not relative to the current date and will display list items that meet the criteria in any year.

All filtering applied to a data list column can be cleared by clicking the following button:



### Custom Filter Selection

The **Custom Filter Selection** dialog box is used to create a custom filter.

To create a custom filter for a data list column:

1. Select (**Custom**) from the drop-down select list. The **Custom Filter Selection** dialog box is displayed:

Operator	Operand

2. Click **Add Condition**. A row is added to the conditions list.
3. Select an operator from the **Operator** drop-down select list.
4. In the **Operand** field, enter a value or select a value from the drop-down select list.
5. Repeat steps 2 through 4 to add additional conditions.
  - To remove a condition, select the row and click **Remove Condition(s)**.
6. To group multiple conditions, select the rows and perform one of the following:
  - Click **'And' Group** to use 'And' as the logical operator for the group.
  - Click **'Or' Group** to use 'Or' as the logical operator for the group.

To ungroup conditions, select the rows and click **Ungroup**.

7. If necessary, change the logical operator for a row or group using one of the following methods:
  - Click the following area of the row or group:



- Select the row or group and click **Toggle**.
8. Click **OK** to close the **Custom Filter Selection** dialog box and apply the custom filter to the data list.

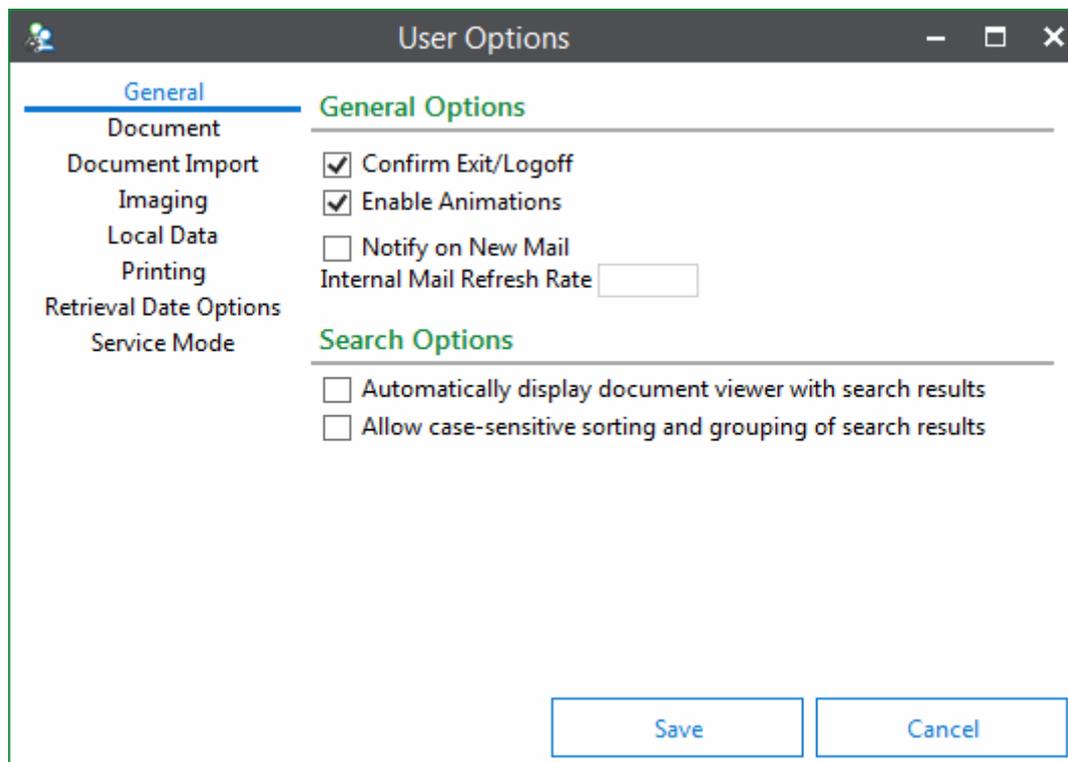
# User Options

## Overview

In the **User Options** dialog box, you can customize the appearance and system functionality for each user. Since settings are assigned per user, they remain in effect at any workstation.

To access the **User Options** dialog box, click the **File** menu and select **User Options**.

The **User Options** dialog box displays with the **General** tab selected by default.



You can save user-specific settings on each of the following tabs:

- **General:** defines Unity Client display features and general behavior.
- **Document:** defines document display options.
- **Document Import:** defines document upload options.
- **Local Data:** allows you to manage local data options.
- **Printing:** defines printing options.

- **Retrieval Date Options:** sets the default date for retrieving documents.
- **Service Mode:** defines Service Mode options. This tab is only displayed when the Unity Client is configured to run in Service Mode.

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**Note:** Some User Options may be enforced by an Administrator with a **User Option Policy**. Options that can not be changed will display the following message when hovered over: **Disabled by Group Policy - This option has been disabled by your system administrator.** Contact your system administrator if you have any questions or concerns regarding the enforced User Option.

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**Note:** Additional tabs may be available if you are licensed for additional functionalities that use the User Options interface. Information on these User Options is contained in the respective module documentation.

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To apply User Options, select the desired options in each tab. Selection controls for options vary (check boxes, text fields in which you can insert a number or date range, etc.). After you have selected the appropriate options, click **Save** to save your changes and to close the User Options dialog box. See the sections below for information about each User Option.

## General

General options control OnBase display features and general behavior. The following options are configured on the **General** tab:

General Option	Description
<b>Confirm Exit/Logoff</b>	You are prompted for confirmation upon exit.
<b>Enable Animations</b>	<p>Animations are enabled during your current Unity Client session. Animations are most noticeable when viewing Keywords, Notes, and Cross-References in the task pane, or when rotating a document. Disabling animations allows for a smoother visual experience.</p> <hr/> <p><b>Note:</b> In a Remote Desktop environment, this option is disabled and cannot be enabled.</p> <hr/>
<b>Enable Pop-up Notifications</b>	Enables the display of pop-up status notifications.
<b>Refresh Internal Mail</b>	<p>The Internal Mail Mailbox is refreshed at the rate specified in the <b>Internal Mail Refresh Rate</b> field.</p> <hr/> <p><b>Note:</b> After selecting <b>Refresh Internal Mail</b>, you must log out of OnBase and log back in for the change to take effect.</p> <hr/>
<b>Internal Mail Refresh Rate</b>	<p>Enter the rate in seconds at which to check for unread and new mail messages and automatically refresh the Internal Mail Mailbox. This field is only available when <b>Refresh Internal Mail</b> is selected. The <b>Internal Mail Refresh Rate</b> field can be set to <b>0</b>, or any number greater than or equal to <b>60</b>.</p> <hr/> <p><b>Note:</b> When the <b>Internal Mail Refresh Rate</b> is set to <b>0</b>, the Unity Client will only check for unread internal mail messages immediately after logging in.</p> <hr/> <p><b>Note:</b> After changing the refresh rate, you must log out of OnBase and log back in for the change to take effect.</p> <hr/>
<b>Enable default directory for Send To File operations</b>	Enable the selection of a default directory in which to save documents when using <b>Send To   File</b> . The default directory is specified in the <b>Directory</b> field.

General Option	Description
<b>Directory</b>	Enter a directory or select a directory by clicking <b>Browse</b> to specify a default directory in which to save documents when using <b>Send To   File</b> . This field is only available when <b>Enable default directory for Send To File operations</b> is selected.

Search Option	Description
<b>Automatically display document viewer with search results</b>	The <b>Document Viewer</b> pane in the Document Search Results list is automatically displayed.
<b>Allow case-sensitive sorting and grouping of search results</b>	Enabling this option allows items in the Document Search Results list to be sorted according to alphanumeric case. By default, case is ignored.

## Document

**Document** options control settings for documents retrieved in the Unity Client. The following options are available on the **Document** tab:

Document Option	Description
<b>Automatically open if search returns a single result.</b>	<p>When a Document Retrieval or Custom Query search results list contains a single document, the document is automatically displayed.</p> <p>If the <b>Automatically display document viewer with search results</b> user option is also selected or the <b>Document Viewer</b> pane is displayed, the document is displayed in the <b>Document Viewer</b> pane.</p> <p>If the <b>Automatically display document viewer with search results</b> user option is not selected, the document is displayed in a new window.</p>
<b>Automatically Display the Notes Task Pane when viewing documents.</b>	<p>When a document is viewed, the Notes Task Pane is automatically displayed. The Notes Task Pane is displayed even if no notes are associated with the document.</p> <hr/> <p><b>Note:</b> This option is not respected when viewing documents through the Document Knowledge Transfer module.</p> <hr/>
<b>Close standalone viewer when viewing .MSG documents</b>	<p>When an .MSG document is viewed, the standalone viewer is closed.</p>
<b>Open email documents as images</b>	<p>Email documents will open as images in the Document Viewer. When this option is not selected, email documents will automatically open externally in their native application.</p> <hr/> <p><b>Note:</b> Email documents opened in the Document Viewer can be opened externally in their native application by selecting <b>View in Native Format</b> from the <b>Viewer Options</b> ribbon group.</p> <hr/> <p><b>Note:</b> Email attachments are not included.</p> <hr/>

Document Option	Description
<p><b>Open Microsoft Office documents using the Office Business Application module</b></p>	<p>Microsoft Office documents will open in the Office Business Application for 2007, Office Business Application for 2010, or Office Business Application for 2013 module.</p> <hr/> <p><b>Note:</b> This option is only available if you are licensed for the Office Business Application for 2007, Office Business Application for 2010, or Office Business Application for 2013 modules.</p> <hr/> <p><b>Note:</b> If you are running the 64-bit version of Microsoft Office, this user option is automatically selected, and cannot be disabled. Office documents will always open in the licensed Office Business Application module.</p> <hr/> <p><b>Note:</b> This option is not respected when viewing Microsoft Office documents through the Document Knowledge Transfer module. When viewing Microsoft Office documents through the Document Knowledge Transfer module, documents are always displayed in the Unity Client Document Viewer.</p> <hr/> <p><b>Note:</b> This option is not respected when importing a document as a revision.</p> <hr/>
<p><b>Disable the Google Viewer when viewing Microsoft Office documents</b></p>	<p>Microsoft Office documents will not be opened using the Google Services Integration Viewer. Instead, they will open using the OLE viewer, or using the WOPI viewer if it is enabled.</p> <p>When this option is not selected, Microsoft Office documents will open in the Google Services Integration Viewer if it is enabled.</p> <hr/> <p><b>Note:</b> This option is not available in the RCM Unity Client.</p> <hr/>

Image Option	Description
<b>Hide Notes</b>	By default, notes icons are not displayed in the Document Viewer.
<b>Hide Annotations</b>	By default, annotations are not displayed in the Document Viewer.
<b>Hide Thumbnails</b>	By default, thumbnails are not displayed in the Document Viewer.
<b>Hide Blank Pages</b>	<p>By default, pages of image documents hidden by Blank Page Suppression are not displayed in certain viewers.</p> <p>If the page number of a suppressed page is selected, that page is still shown as normal. When navigated away from, the page will not be hidden again until the pages are refreshed.</p> <p>The following items should be noted with Hide Blank Pages:</p> <ul style="list-style-type: none"> <li>• The page count includes hidden pages.</li> <li>• This option applies to documents scanned into OnBase through a batch scan process.</li> <li>• This option does not apply in Document Separation or the editing layout, when working with signatures, when printing, when emailing, or when saving documents to file.</li> <li>• This option is only available if the database has been configured for Blank Page Suppression. Contact your system administrator for more information.</li> </ul>
<b>Auto-Save Flip and Rotation</b>	Any flip or rotation you apply to an image document is automatically saved.
<b>Reset Image Scale on Page Change</b>	When navigating between pages, the image scale is reset to default settings.

Image Scale	Description
<b>Fit To Width</b>	Image documents are scaled so that their width is the same as the width of the Document Viewer.
<b>Fit To Window</b>	Image documents are scaled so that the entire image is displayed in the Document Viewer.
<b>Actual Size</b>	Image documents are displayed in their actual size.

Auto Display Keyword Option	Description
<b>Show Always</b>	The <b>Keywords</b> window is displayed when viewing documents containing keywords that are configured to automatically display.

Auto Display Keyword Option	Description
<b>Show Collapsed</b>	The <b>Keywords</b> window is displayed minimized when viewing containing keywords that are configured to automatically display.
<b>Hide</b>	The <b>Keywords</b> window is not displayed when viewing containing keywords that are configured to automatically display.

## Document Import

Document import options affect how you upload documents. The following options are available on the **Document Import** tab:

Document Import Option	Description
<b>Clear Document Keywords After Import</b>	Keyword Values are cleared from the <b>Keywords</b> pane in the <b>Import</b> layout after you upload a document.
<b>Open Document After Import</b>	When uploading a document, the <b>Open Document After Import</b> check box is selected by default. <hr/> <b>Note:</b> After selecting this option, you must log out of OnBase and log back in for it to be in effect. <hr/>
<b>Delete Files After Import</b>	This option enables by default the <b>Delete Files After Import</b> option in the <b>Options</b> pane on the <b>Import</b> layout. This will delete the document from its original location after it is uploaded.
<b>Expand Options Panel By Default</b>	Select to have the <b>Options</b> pane on the <b>Import</b> layout expanded by default.

Preview Option	Description
<b>Enable Automatic Preview of Imported Files</b>	A preview of the file will be immediately displayed in the <b>Import</b> layout. When this check box is cleared, a <b>Preview is currently disabled</b> message is displayed in the <b>Import</b> layout's <b>Preview</b> pane after you upload a document. Click the corresponding hyperlink to view the preview of the file.

## Local Data

The local bitmap cache can be cleared from within the User Options dialog. The following option is available in the **Local Data** tab:

Image Cache Option	Description
<b>Clear Local Image Cache</b>	Click to clear the local image cache used to store icons and images retrieved from the Application Server.

## Printing

Printing options affect how you print documents. The following option is available on the **Printing** tab:

Printing Option	Description
<b>Use native browser printing behavior</b>	<p>Printing an Electronic Form (E-Form) or HTML document from the Document Viewer will print the document using Internet Explorer instead of OnBase. Any print formatting styles within the HTML document is preserved.</p> <hr/> <p><b>Note:</b> This option only applies to printing done directly from the Document Viewer (for example, by selecting <b>Send To   Print</b>). When printing from a Document Search Results list, OnBase will always be used to print the document, regardless of whether this option is selected.</p> <hr/> <p><b>Note:</b> Unity Forms always display the browser's <b>Print</b> dialog regardless of this setting.</p> <hr/>

Default Page Range Option	Description
<b>Print All Pages</b>	Select to set the default print range to <b>Print All Pages</b> .
<b>Print Current Page</b>	Select to set the default print range to <b>Print Current Page</b> .

## Retrieval Date Options

Retrieval date options allow you to set a default date to be used by the system for retrieving documents using the **Document Retrieval** and **Custom Queries** layouts. Setting the default date saves time when you frequently search for documents using a specific date or date range.

The following options are available on the **Retrieval Date** tab:

Single Date Option	Description
<b>None</b>	No default date is used.
<b>Last Weekday</b>	The previous weekday is used as a default. Friday is considered the last day of the week.
<b>Last Business Day</b>	The previous business day is used as a default. Saturday is considered the last business day of the week.
<b>Yesterday</b>	Yesterday's date is used as the default date.
<b>Today</b>	Today's date is used as the default date.
<b>First of the Month</b>	First day of the current month is used as the default date.
<b>Last of the Month</b>	Last day of the previous month is used as the default date.
<b>Specific Day</b>	The specified day is used as the default date.

Date Range Option	Description
<b>Last Month</b>	The date range of the prior month is used as the default date range.
<b>Current Month</b>	The date range of the current month is used as the default date range.
<b>Current Week</b>	The date range of the current week is used as the default date range.
<b>Month to Date</b>	The date range extends from the first day of the current month to the current date.
<b>Year to Date</b>	The date range extends from the first day of the year to the current date.
<b>Last Number of Days</b>	The date range is determined by the number of days specified.
<b>Last Number of Weeks</b>	The date range is determined by the number of weeks specified.
<b>Last Number of Months</b>	The date range is determined by the number of months specified.

When you select an option, the date or date range is shown in the **Example Dates** field.

## Service Mode

Service Mode options affect how the Unity Client functions in Service Mode. Information on the following Unity Client features is displayed on the **Service Mode** tab:

Unity Client Registration	Description
<b>UnityPop</b>	Allows for the handling of Unity Pop files.
<b>Unity Automation</b>	Allows for automation of the Unity Client by external applications.
<b>Run At Windows Startup</b>	Allows the Unity Client to run when Windows starts.

The location of the Unity Client executable that registered each feature is displayed, along with the version and build of OnBase.

To force registration of these features, which means that they will use the current Unity Client executable if they are not already doing so, click **Set Registration**.



## Document Retrieval

You can retrieve documents in a variety of ways from within the Unity Client. Retrieval options can be accessed from the **Documents** ribbon group in the **Home** tab.

Retrieval options include:

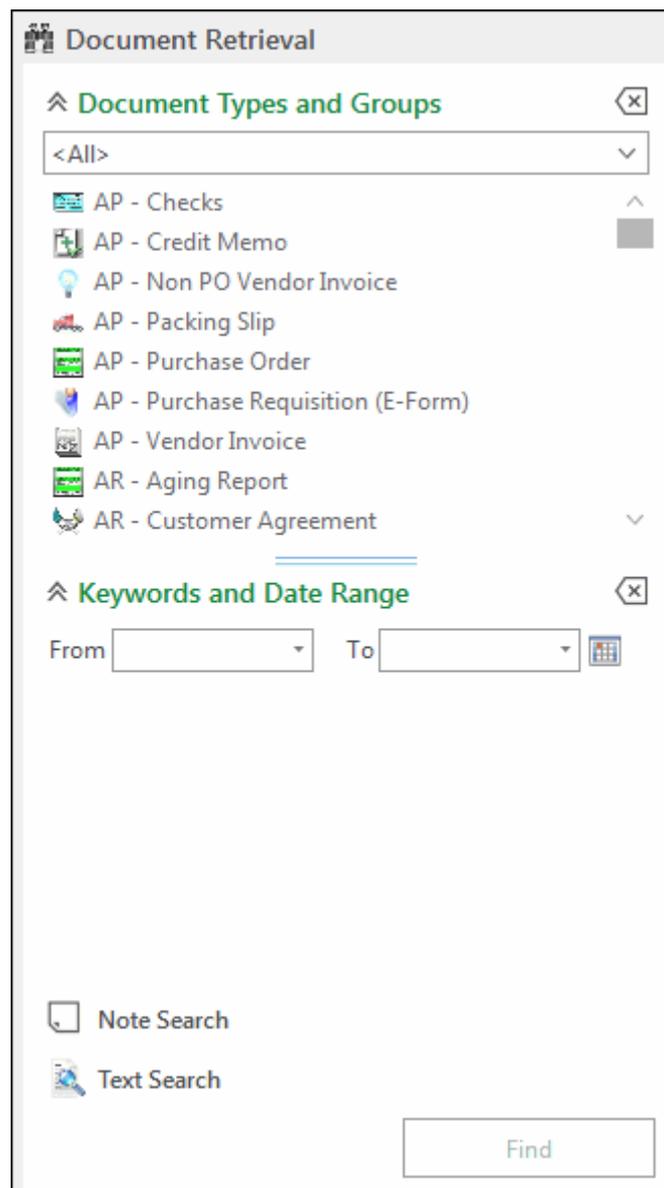
- **Custom Queries** - See [Retrieval Using Custom Queries on page 60](#) for more information.
- Retrieval without specifying search parameters - See [Document Retrieval without Specifying Search Parameters on page 59](#) for more information.
- Retrieval by **Keyword Value** - See [Document Retrieval by Keyword Value on page 71](#) for more information.
- Retrieval by **Document Date** - See [Document Retrieval by Document Date on page 77](#) for more information.
- Retrieval by **Note Search** - See [Document Retrieval Using Note Search on page 82](#) for more information.
- Retrieval using **External Text Search** - See [Document Retrieval Using External Text Search on page 85](#) for more information.
- **File Cabinets** - See [Folders on page 214](#) for more information.
- **Envelopes** - See [Using Envelopes on page 272](#) for more information.
- **Query History** - See [Viewing Recent Query History on page 88](#) for more information.
- **Document Handle** - See [Document Retrieval by Document Handle on page 89](#) for more information.

## Document Retrieval without Specifying Search Parameters

If configured, documents can be retrieved from the Document Retrieval pane without specifying search parameters.

**Note:** You may not be able to perform searches without providing some search parameters, depending on your configuration. Contact your system administrator for additional information.

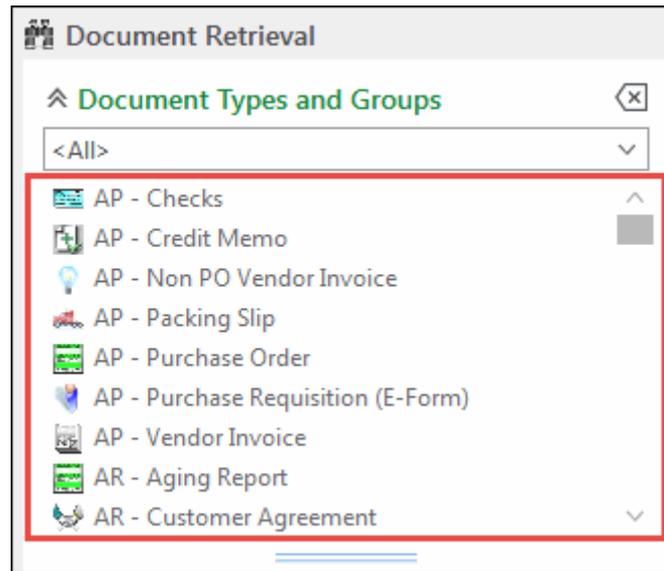
1. In the **Home** tab, click **Retrieval**.
2. The **Document Retrieval** layout is opened. Ensure that the **Document Retrieval** pane is expanded:



The screenshot shows the 'Document Retrieval' pane with the following elements:

- Document Types and Groups:** A section header with a collapse icon (x) on the right. Below it is a dropdown menu currently set to '<All>'. A list of document types follows, each with a small icon and a collapse/expand icon on the right:
  - AP - Checks
  - AP - Credit Memo
  - AP - Non PO Vendor Invoice
  - AP - Packing Slip
  - AP - Purchase Order
  - AP - Purchase Requisition (E-Form)
  - AP - Vendor Invoice
  - AR - Aging Report
  - AR - Customer Agreement
- Keywords and Date Range:** A section header with a collapse icon (x) on the right. Below it are two dropdown menus labeled 'From' and 'To', with a calendar icon to the right of the 'To' dropdown.
- Search Options:** Two checkboxes are visible: 'Note Search' and 'Text Search'.
- Find Button:** A button labeled 'Find' is located at the bottom right of the pane.

- From the first drop-down list in the **Document Types and Groups** pane, 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. You can also select a Document Type Group by typing the name of the Document Type Group.
- From the **Document Types** list, select the Document Type(s) to be included in your search:



You can also select a Document Type by typing the name of the Document Type. To select multiple Document Types, press **Shift** or **Ctrl** as you click.

---

**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 from the drop-down list. If the Document Type Group is **Group Search Enabled**, the **Find** button is available when the Document Type Group is selected.

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- Press the **Enter** key or click **Find**:



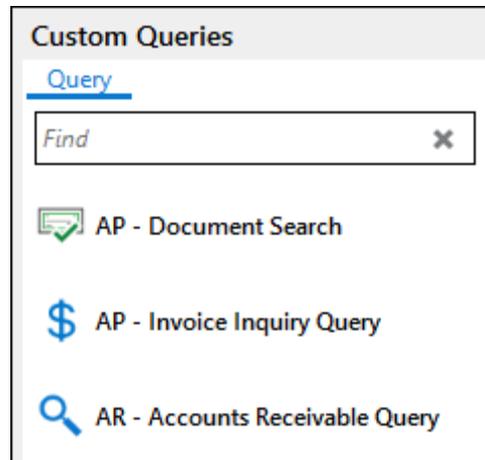
## Retrieval Using Custom Queries

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 and folders 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 session. At any later time in the same session, you can conduct the same query by clicking **Query History** on the **Home** tab, and then selecting the Custom Query from the list in the resulting **Query History** pane.

## Conducting a Custom Query

1. On the **Home** tab, click **Custom Queries**.
2. The **Custom Queries** panel displays all available Custom Queries:



3. If you want to narrow the list of Custom Queries displayed for selection, in the **Find** field, enter text that is contained in the name of the Custom Query you wish to conduct.
4. Select a Custom Query.

5. The Custom Query form is displayed:

The screenshot shows the 'Custom Queries' interface. On the left, a list of queries is displayed, with 'AR - Accounts Receivable Query' selected and highlighted in yellow. The right pane shows the details for this query, including a search bar, date range options, and input fields for PO number and customer name.

6. Some or all of the fields may be filled in automatically.
7. 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 Custom 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** and a **To** date, all documents within the date range will be found

---

**Note:** You can include additional instances of a Keyword Type, or use Wildcard or Boolean operators to narrow the search.

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Depending on the configuration of the Custom Query, you may have access to external text search options using the **Find Text in Documents** pane.

See [Document Retrieval Using External Text Search on page 85](#) for more information on the options in this pane.

If necessary, click the **Clear** button or the clear button configured on the Custom Query to clear all fields.

8. Press the Enter key, click the **Search** button, or click the search button configured on the Custom Query itself.

9. Documents that meet the search criteria are displayed, along with the name of the Custom Query and the number of documents that meet the search criteria:

AP - Invoice Inquiry Query - Search Results: 12 Document(s)

AP - Invoice Inquiry Query

Icon	Document Type	Vendor Name	Invoice #	Invoice Amount	PO #
<input type="checkbox"/>					
	AP - Vendor Invoice	COMPUTERS ARE US	1110	\$3,775.00	656
	AP - Vendor Invoice	COMPUTERS ARE US	1220	\$854.40	765
	AP - Vendor Invoice	COMPUTERS ARE US	1330	\$952.30	881
	AP - Vendor Invoice	OFFICE SUPPLY WAREHOUSE	2110	\$208.65	660
	AP - Vendor Invoice	OFFICE SUPPLY WAREHOUSE	2220	\$834.60	767
	AP - Vendor Invoice	OFFICE SUPPLY WAREHOUSE	2330	\$281.14	885
	AP - Vendor Invoice	PHONE SHACK	2110	\$2,210.00	662

**Note:** If you used the external text search options in the **Find Text in Documents** pane, search results are displayed in an External Text Search Results window.

Your system may be configured to automatically display one of the selected documents in the Document Viewer.

Depending on a Custom Query's configuration, documents that meet the search criteria may be automatically grouped by one of the display columns:

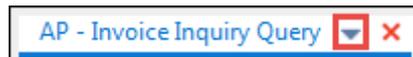
AP - Invoice Inquiry Query - Search Results: 12 Document(s)

AP - Invoice Inquiry Query

Icon	Document Type	Vendor Name	Invoice #	Invoice Amount	PO #
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶	COMPUTERS ARE US (3 items)				
▶	OFFICE SUPPLY WAREHOUSE (3 items)				
▶	PHONE SHACK (3 items)				
▶	TAP-IT BUTTONS, INC (3 items)				

**Note:** If a Keyword Type that is used as a display column has more than one value for a document, the document is listed for each Keyword Value.

The tab contains various buttons. Click the drop-down button on the tab to display additional options.



The tab contains the following buttons:

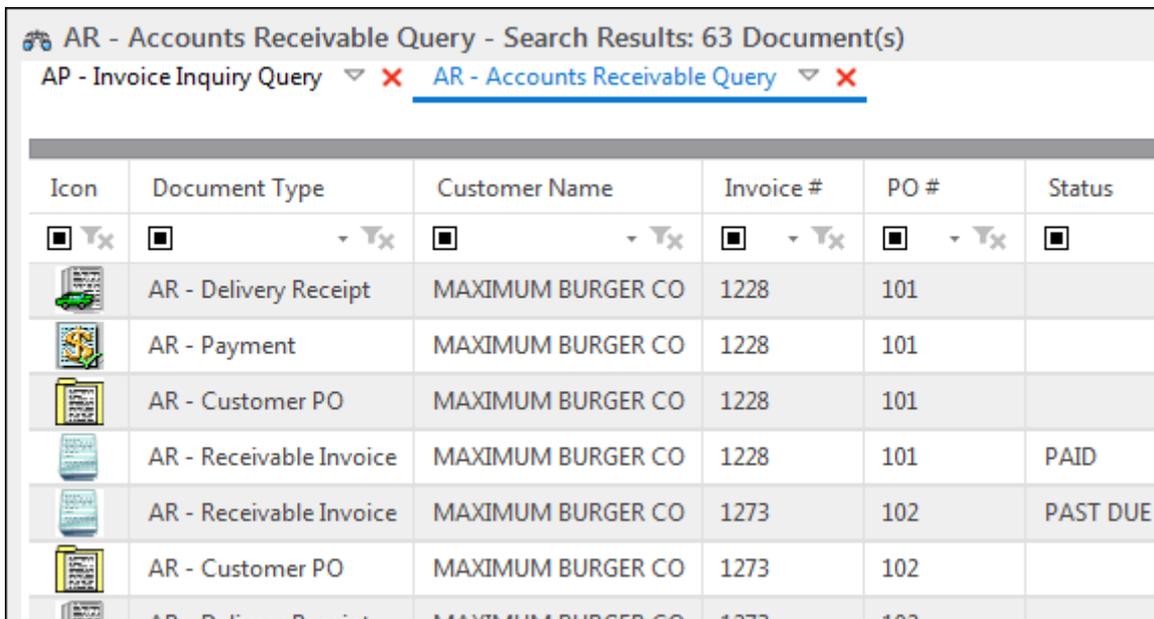
Button	Description
<b>Open in New Window</b> 	Click to open the Custom Query results in a new window.
<b>Refresh</b> 	Click to refresh the Custom Query results. <hr/> <b>Note:</b> When Custom Query results are opened in a new window, <b>Refresh</b> is available on the <b>Document</b> tab ribbon. <hr/>
<b>Add to Personal Page</b> 	Click to add the current Custom Query results to your Personal Page. After clicking this button, you can add a description for the tile before it is added to your Personal Page.
<b>Add to Tile Groups</b> 	Click to add the current Custom Query results to a Tile Group. After clicking this button, you can add a description for the tile before it is added to the Tile Group of your choice. <hr/> <b>Note:</b> This button is disabled if you are not configured to create or administer Tile Groups. <hr/>
<b>Send Query as Link</b> 	Click to send the current Custom Query results to an external user. After clicking this button, your e-mail client will open a blank e-mail that contains, depending on your configuration, a Unity Pop link or Unity Pop file to the Custom Query results. <hr/> <b>Note:</b> This button is disabled if you are not configured to send Unity Pop links or files. <hr/> <b>Caution:</b> Custom Query results sent as Unity Pop links or files include keywords as un-encoded plain text. Before you send a Custom Query in this way, consider who the recipient is and what keywords are included (i.e. social security numbers). <hr/> <b>Note:</b> For more information on sending and receiving Unity Pop links and files, see <a href="#">Emailing Documents and Links to Documents on page 260</a> . <hr/>

Button	Description
	Click to close all Custom Query results tabs. These results will no longer be available.

Depending on your configuration, the **Filter** tab may be displayed in the **Custom Queries** pane. For more information on the **Filter** tab, see [Filtering Custom Query Results on page 68](#).

## Conducting Multiple Custom Queries

When you conduct multiple Custom Queries, results for each Custom Query are retained on their respective tabs for future use:



Icon	Document Type	Customer Name	Invoice #	PO #	Status
	AR - Delivery Receipt	MAXIMUM BURGER CO	1228	101	
	AR - Payment	MAXIMUM BURGER CO	1228	101	
	AR - Customer PO	MAXIMUM BURGER CO	1228	101	
	AR - Receivable Invoice	MAXIMUM BURGER CO	1228	101	PAID
	AR - Receivable Invoice	MAXIMUM BURGER CO	1273	102	PAST DUE
	AR - Customer PO	MAXIMUM BURGER CO	1273	102	
	AR - Delivery Receipt	MAXIMUM BURGER CO	1273	102	

---

**Note:** Results are retained for the duration of your OnBase session.

---

If you navigate away from the **Custom Queries** layout, or select a different Custom Query from the list of available Custom Queries, you can return to the list of results by clicking **Go To Results**:

The screenshot displays the Unity Client interface. On the left, the 'Custom Queries' panel is visible, featuring a search bar labeled 'Query' with the text 'Find' and a close button. Below the search bar is a list of queries: 'AP - Document Search', 'AP - Invoice Inquiry Query', 'AR - Accounts Receivable Query' (highlighted in yellow), 'AR - Document Search', 'Bitmaps & Icons', 'HR - Applicant Information', 'HR - Employee Records Search', and 'HR - Resumes by Position Applied'. On the right, the 'AR - Accounts Receivable Query' panel is shown. At the top of this panel, a 'Go To Results' button is highlighted with a red box. Below this button, there is a text instruction: 'Enter a PO number to retrieve all documents (Purchase Order, Delivery Receipt, Invoice, and Payments) related to that PO.' Underneath is a 'Date Options' section with 'From' and 'To' dropdown menus. Below the date options are two text input fields labeled 'PO #' and 'Customer Name'. At the bottom of the panel, there are 'Clear' and 'Search' buttons.

## Viewing Folder Custom Query Results

Folder Type Custom Queries work like other Custom Queries, except they retrieve folders rather than documents.

When a Custom Query is used for folder retrieval, the results list displays all folders satisfying the search criteria. A folder may be listed multiple times if it has more than one value for a Keyword Type that is used as a display column.

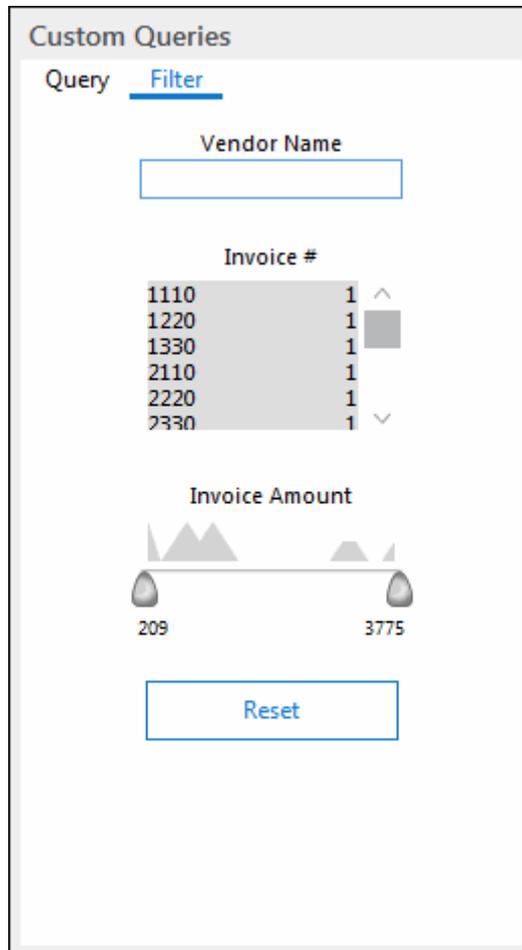
The right-click options available for folder search results allow you to perform folder-related tasks, such as viewing folder Keyword Values or displaying Folder History. To open a folder in the **File Cabinets** layout, double-click it from the list. If only one folder is returned, the **File Cabinets** layout opens the folder automatically.

## Filtering Custom Query Results

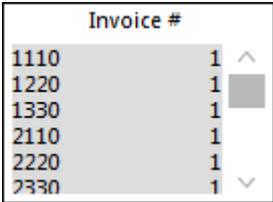
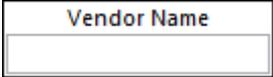
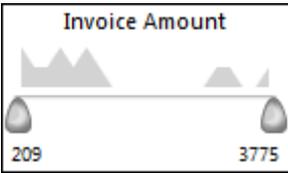
Depending on a Custom Query's configuration, you may be able to filter Custom Query results using the **Filter** tab in the **Custom Queries** pane:



When the **Filter** tab is selected, the **Custom Queries** pane displays any of the filters that are configured for the Custom Query:



The following filter types are available:

Filter Type	Example	Description
<b>Instance</b>		<p>This filter is displayed as a list of values with the number of instances of that value. As you select and clear values, the Custom Query results list updates accordingly.</p> <p>Select or clear multiple values by holding the <b>Ctrl</b> or <b>Shift</b> keys and clicking. Select all values by pressing <b>Ctrl + A</b>.</p>
<b>Text</b>		<p>This filter is displayed as a text box. As you type in the text box, the Custom Query results list is updated accordingly.</p> <p>When a text filter is configured for an alphanumeric Keyword Type, such as Vendor Name, a wildcard is automatically applied to the end of the value specified in the text box.</p> <p>When a text filter is configured for a non-alphanumeric Keyword Type, such as a number or date, multiple values can be entered in the text box. Separate multiple values with a comma or semicolon. Ranges of values can be entered by using a hyphen. To find all values greater than the value entered in the text box, add a <b>+</b> after the value.</p> <hr/> <p><b>Note:</b> When specifying a date or a range of dates, you must specify a month, day, and year in a date format supported by OnBase.</p>
<b>Pinch</b>		<p>This filter is displayed as a slider, with two thumbs beneath a sparkline. The sparkline indicates the density of data over the range of values. Pinch the thumbs in this filter towards each other to narrow down the Custom Query results.</p> <hr/> <p><b>Note:</b> If two or less results are returned by the Custom Query, pinch filters are displayed as instance filters.</p>

When you apply filters to a Custom Query, the number of documents that meet the search criteria is updated.

The order in which filters are displayed in the **Custom Queries** pane is determined by your system administrator.

Use the **Reset** button to remove any applied filters and return to the original Custom Query results list.

---

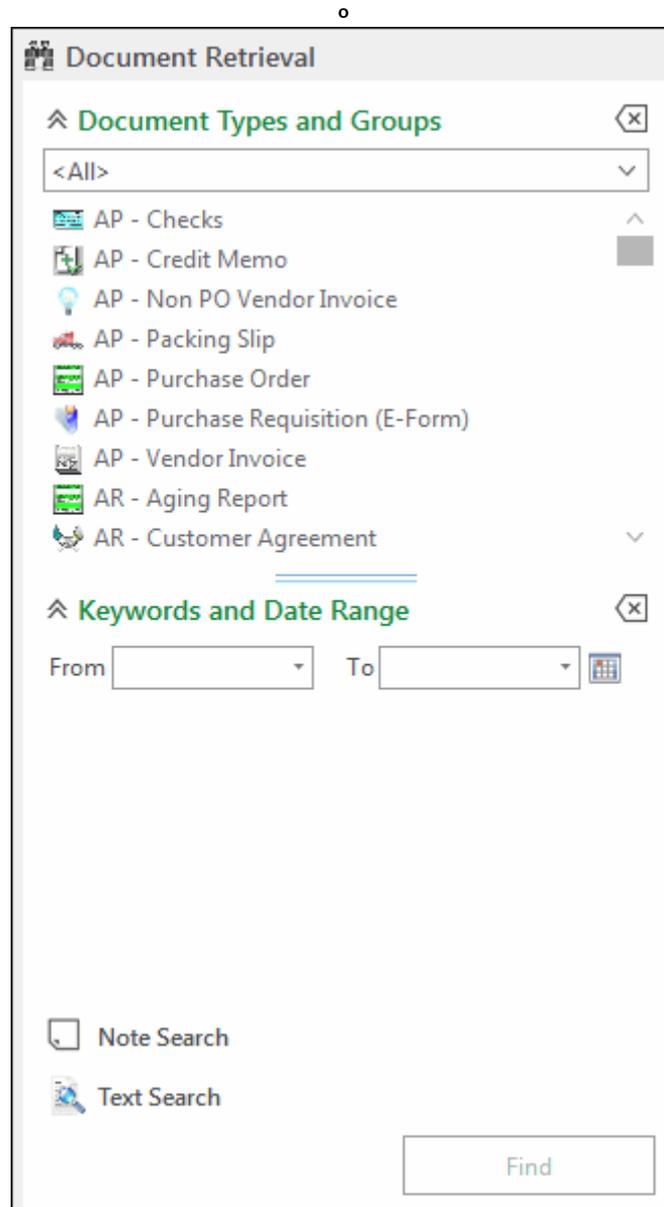
**Note:** Filters in the **Custom Queries** pane are not updated when you apply a filter to a Custom Query results list. For example, a Custom Query includes an instance filter for **Invoice #** and a pinch filter for **Invoice Amount**. Invoice #1110 in your system is in the amount of \$200.00. When you use the pinch filter to narrow down a Custom Query results list to invoices between \$400.00 and \$600.00, Invoice #1110 will still be displayed in the **Invoice #** instance filter.

---

## 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. In the **Home** tab, click **Retrieval**.
2. The **Document Retrieval** layout is opened. Ensure that the **Document Retrieval** pane is expanded:



The screenshot shows the 'Document Retrieval' pane with the following sections:

- Document Types and Groups:** A dropdown menu currently set to '<All>'. Below it is a list of document types with icons: AP - Checks, AP - Credit Memo, AP - Non PO Vendor Invoice, AP - Packing Slip, AP - Purchase Order, AP - Purchase Requisition (E-Form), AP - Vendor Invoice, AR - Aging Report, and AR - Customer Agreement.
- Keywords and Date Range:** A section with two dropdown menus labeled 'From' and 'To', and a calendar icon to the right of the 'To' dropdown.
- Search Options:** Two checkboxes labeled 'Note Search' and 'Text Search'.
- Find Button:** A button labeled 'Find' at the bottom right of the pane.

**Note:** Some Document Types are configured to require Keyword Values to be entered in order

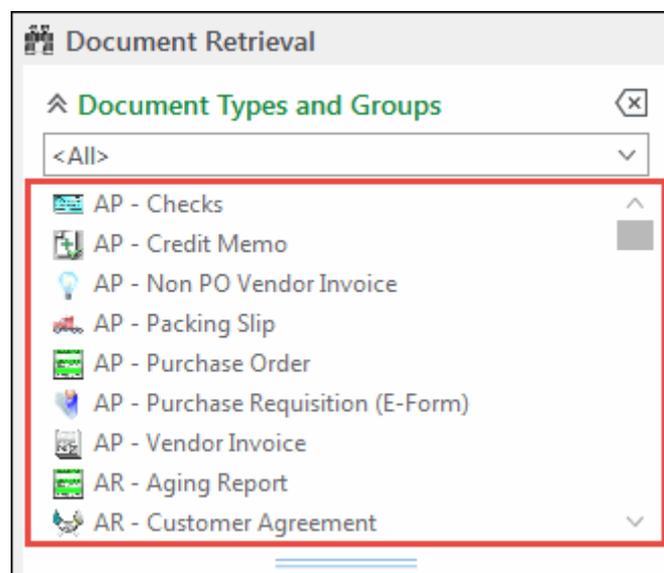
to create and/or retrieve documents. Required Keyword Values are displayed in red for these operations, which may include the following: Document Retrieval, upload, and adding/modifying Keyword Values.

---

**Note:** User rights are needed to access the **Document Retrieval** layout and to view documents. Contact your system administrator for additional information.

---

3. From the first drop-down list in the **Document Types and Groups** pane, 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. You can also select a Document Type Group by typing the name of the Document Type Group.
4. From the **Document Types** list, select the Document Type(s) to be included in your search:



You can also select a Document Type by typing the name of the Document Type. To select multiple Document Types, press **Shift** or **Ctrl** as you click.

---

**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 from the drop-down list. If the Document Type Group is **Group Search Enabled**, the **Find** button is available when the Document Type Group is selected.

---

- When a Document Type is selected, the Keyword Types with which it is associated are displayed. All documents assigned to a Document Type have the same Keyword Types, but 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.

### Document Retrieval

Document Types and Groups ✕

Accounts Payable ▼

- AP - Checks ▲
- AP - Credit Memo
- AP - Non PO Vendor Invoice
- AP - Packing Slip**
- AP - Purchase Order ▼
- AP - Purchase Requisition (E-Form) ▼

Keywords and Date Range ✕

From  To  📅

PO #  =

Vendor #  =

Vendor Name  =

Invoice #  =

Note Search

Text Search

6. Type Keyword Values or select Keyword Values from the drop-down list, if available. You can use the **Tab** key to move to the next Keyword Value field.

When the cursor is in the Keyword Type's field, you can press **F5** to open the drop-down list, if one exists. You can use the up and down arrow keys to select from the Keyword Values displayed in the drop-down list. When you have selected the appropriate Keyword Value, press **Enter**.

If you type a partial value before pressing **F5** or opening the drop-down list, the drop-down list will begin with those values that match the partial value.

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.

---

**Note:** You are only able to view the first 100 entries in a drop-down list. To reduce the values displayed in a drop-down list, type several characters into the field before expanding the drop-down list.

---

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

---

7. When you have entered all search criteria, press the Enter key or click **Find**:



8. All documents that match the search criteria are displayed in a Search Results 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.

---

**Note:** OnBase maintains a record of the search criteria used in each search in **Query History**, so that you can repeat it exactly during a given session.

---

When retrieving documents by Keyword Value, the following keyboard shortcuts are available:

Keyboard Shortcut	Description
<b>F3</b>	Change the operator for the selected Keyword Type.
<b>F4</b>	Change the connector for the selected Keyword Type.
<b>F5</b>	Show the drop-down select list for the selected Keyword Type.
<b>F6</b>	Add another value for a Keyword Type.
<b>Ctrl + O</b>	Collapse or expand any Multi-Instance Keyword Type Groups.

## 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:

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

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

Search Results: 13 Document(s)		
Icon	Name	Type
	Vendor Invoice 4330 for PO 898 from TAP-IT BUTTONS, INC in the amount of \$1,437.50	AP - Vendor Invoice
	Vendor Invoice 4220 for PO 797 from TAP-IT BUTTONS, INC in the amount of \$600.00	AP - Vendor Invoice
	Vendor Invoice 4110 for PO 676 from TAP-IT BUTTONS, INC in the amount of \$1,183.00	AP - Vendor Invoice
	Vendor Invoice 3330 for PO 888 from PHONE SHACK in the amount of \$1,110.00	AP - Vendor Invoice
	Vendor Invoice 3220 for PO 779 from PHONE SHACK in the amount of \$3,000.00	AP - Vendor Invoice
	Vendor Invoice 3110 for PO 662 from PHONE SHACK in the amount of \$3,210.00	AP - Vendor Invoice
	Vendor Invoice 2440 for PO 990 from OFFICE SUPPLY WAREHOUSE in the amount of \$500.00	AP - Vendor Invoice
	Vendor Invoice 2330 for PO 885 from OFFICE SUPPLY WAREHOUSE in the amount of \$281.14	AP - Vendor Invoice
	Vendor Invoice 2220 for PO 767 from OFFICE SUPPLY WAREHOUSE in the amount of \$834.60	AP - Vendor Invoice
	Vendor Invoice 2110 for PO 660 from OFFICE SUPPLY WAREHOUSE in the amount of \$208.65	AP - Vendor Invoice
	Vendor Invoice 1330 for PO 881 from COMPUTERS ARE US in the amount of \$952.30	AP - Vendor Invoice
	Vendor Invoice 1220 for PO 765 from COMPUTERS ARE US in the amount of \$854.40	AP - Vendor Invoice
	Vendor Invoice 1110 for PO 656 from COMPUTERS ARE US in the amount of \$3,775.00	AP - Vendor Invoice

## Viewing Documents

When the **Document Viewer** pane is expanded, you can view a document by selecting it from the Documents Search Results list:

The screenshot shows the 'Search Results: 1 of 13 Document(s) Selected' pane. It contains a table with the following data:

Icon	Name	Type
	Vendor Invoice 4330 for PO 898 from TAP-IT BUTTONS, INC in the amount of \$1,437.50	AP - V
	Vendor Invoice 4220 for PO 797 from TAP-IT BUTTONS, INC in the amount of \$600.00	AP - V
	Vendor Invoice 4110 for PO 676 from TAP-IT BUTTONS, INC in the amount of \$1,183.00	AP - V
	Vendor Invoice 3330 for PO 888 from PHONE SHACK in the amount of \$1,110.00	AP - V

Below the table is the 'Document Viewer' section for the selected document: 'Vendor Invoice 4220 for PO 797 from TAP-IT BUTTONS, INC in the amount...'. It shows '1 Page' and a preview of the invoice document.

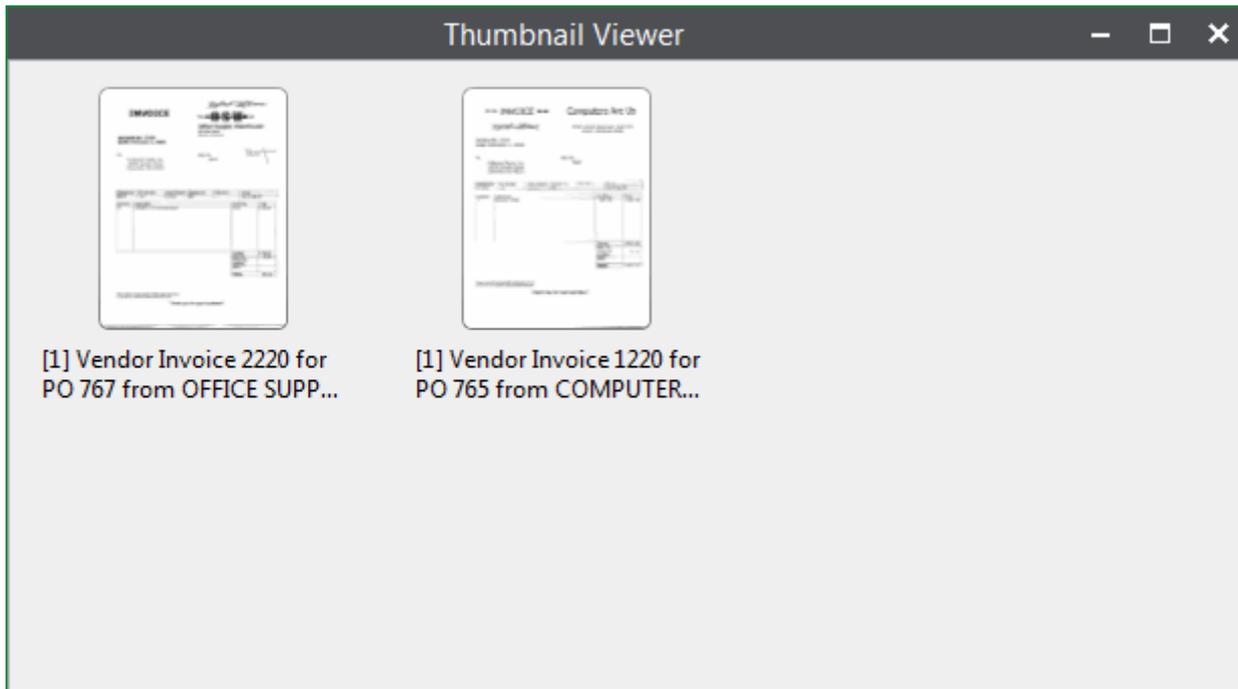
The invoice preview includes the word 'INVOICE' in a large, stylized font, the company logo for 'TAP-IT BUTTONS, INC.' which features a circuit diagram, and the address '1934 E. Anaheim Long Beach, CA 90813'. At the bottom left, it specifies 'Invoice No: 4220' and 'Date: February 4, 2008'.

You can select multiple documents from a Documents Search Results 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. Unavailable options are grayed out.

## Thumbnail Viewer

The Thumbnail Viewer displays the selected documents as a thumbnail image of their first page.



---

**Note:** Depending on Document Type, some documents may be displayed as **No Image Available**.

---

To view selected documents in the Thumbnail Viewer, right-click the selected documents and select **Open in Thumbnail Viewer**.

## 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 searches by Keyword Value, external text searches, and note searches. A Document Date is assigned to all documents upon import.

---

**Note:** User rights are needed to access the **Document Retrieval** layout and to view documents. Contact your system administrator for additional information.

---

See [Document Properties on page 138](#) for clarification on Document Date vs. Date Stored.

1. In the **Home** tab, click **Retrieval**.
2. The **Document Retrieval** layout is opened. Ensure that the **Document Retrieval** pane is expanded:

**Document Retrieval**

**Document Types and Groups**

<All>

- AP - Checks
- AP - Credit Memo
- AP - Non PO Vendor Invoice
- AP - Packing Slip
- AP - Purchase Order
- AP - Purchase Requisition (E-Form)
- AP - Vendor Invoice
- AR - Aging Report
- AR - Customer Agreement

**Keywords and Date Range**

From  To

Note Search

Text Search

Find

- From the first drop-down list in the **Document Types and Groups** pane, 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. You can also select a Document Type Group by typing the name of the Document Type Group.

4. In the **Keywords and Date Range** pane, enter date(s) in the **From** and/or **To** fields:

The screenshot shows a search interface titled "Keywords and Date Range". At the top, there are two date input fields labeled "From" and "To", each with a dropdown arrow and a calendar icon. These two fields are enclosed in a red rectangular box. Below the date fields are four search criteria, each with a text input field and a blue equals sign button: "PO #", "Vendor #", "Vendor Name", and "Invoice #". At the bottom of the pane, there are two checkboxes: "Note Search" (unchecked) and "Text Search" (checked). A blue "Find" button is located at the bottom right of the pane.

---

**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.

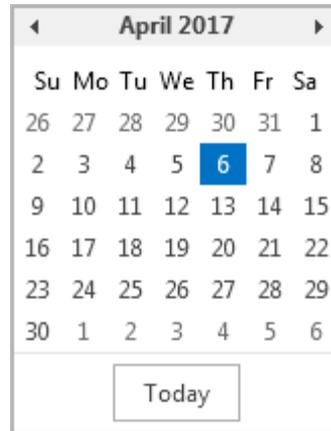
---

You can also specify values by:

- Click the drop-down arrow next to the **From** or **To** field:



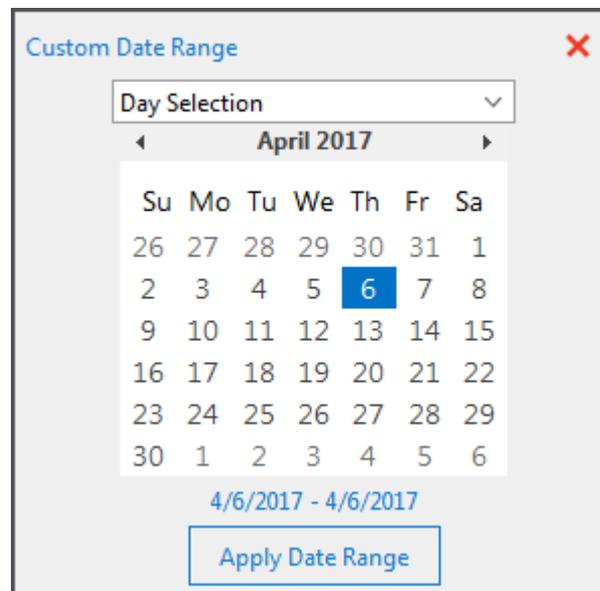
- A calendar is displayed:



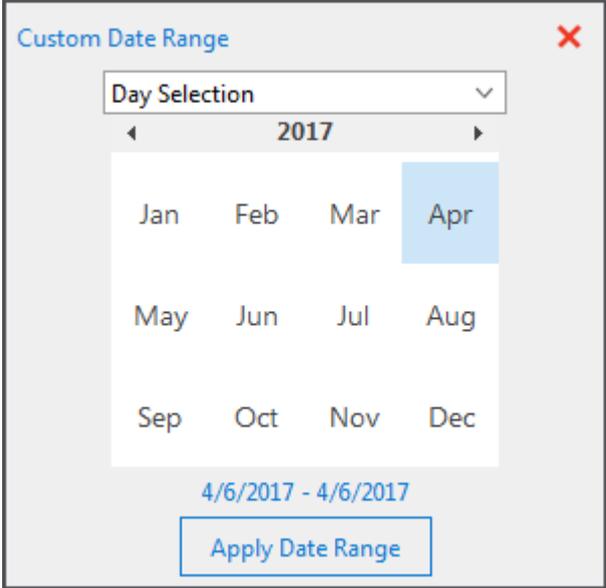
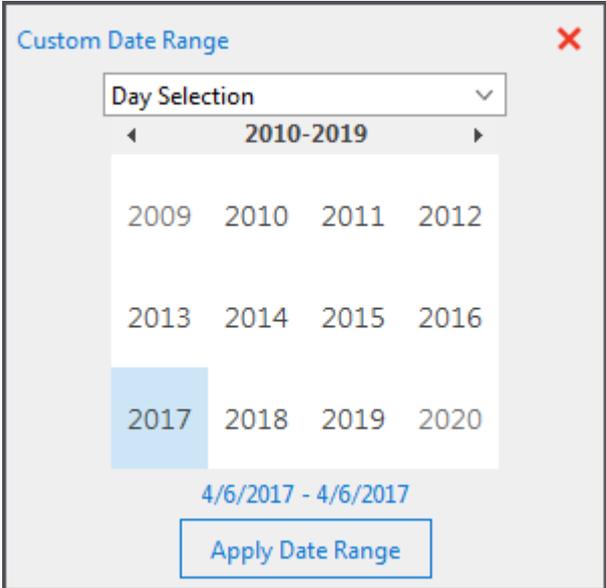
- Select a day.
  - The **From** or **To** fields automatically populate according to your selection.
- Clicking the **Custom Date Range** button:



- The **Custom Date Range** window is displayed:



Calendar selections are available from the drop-down list at the top of the **Custom Date Range** window. **Day Selection** is selected by default. Additional options include:

Custom Date Range	Description
<p><b>Month Selection</b></p>	<p>Select to show months in the calendar:</p> 
<p><b>Year Selection</b></p>	<p>Select to show years in the calendar:</p> 

- b. In the calendar, select a day, or click and drag to select multiple days.
- c. This date range is displayed below the calendar.
- d. To apply the date range, click **Apply Date Range**.

- e. The **From** or **To** fields automatically populate according to your selection.

## Date Range Parameters and Corresponding Results

Date Range Parameter	Corresponding Result
<b>From left blank, To left blank</b>	Retrieves all documents with document dates from 1/1/1753 through the current date.
<b>From left blank, To valid date</b>	Retrieves all documents with document dates from 1/1/1753 through the date in the <b>To</b> field.
<b>From valid date, To left blank</b>	Retrieves all documents with document dates from the date in the <b>From</b> field through the current date.
<b>From valid date, To valid date</b>	Retrieves all documents with document dates from the date in the <b>From</b> field through the date in the <b>To</b> 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 <b>From</b> date cannot be greater than the <b>To</b> date.
<b>From valid date = To valid date</b>	Retrieves all documents with the specified document date.

## Document Retrieval Using Note Search

You can 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.

---

**Note:** User rights are needed to access the **Document Retrieval** layout and to view documents. Contact your system administrator for additional information.

---

1. In the **Home** tab, click **Retrieval**.
2. The **Document Retrieval** layout is opened. Ensure that the **Document Retrieval** pane is expanded:

**Document Retrieval**

**Document Types and Groups**

<All>

- AP - Checks
- AP - Credit Memo
- AP - Non PO Vendor Invoice
- AP - Packing Slip
- AP - Purchase Order
- AP - Purchase Requisition (E-Form)
- AP - Vendor Invoice
- AR - Aging Report
- AR - Customer Agreement

**Keywords and Date Range**

From  To

Note Search

Text Search

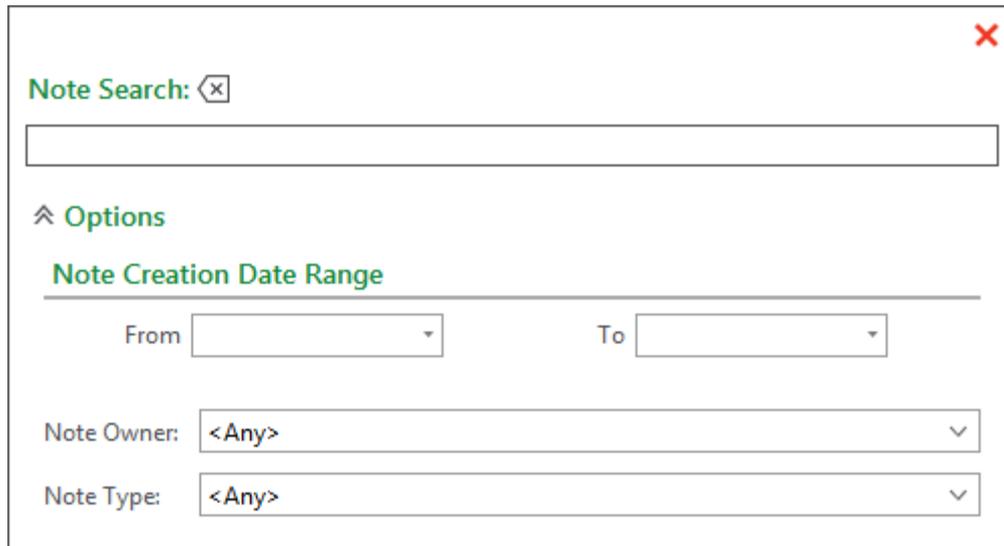
Find

3. Select the Document Type Group(s) and/or Document Type(s) to search.
4. Click the **Note Search** hyperlink.
5. The **Note Search** window is displayed:

Note Search:

Options

6. Type the note text to search for in the **Find What** field, or use the drop-down list to select from previous note searches.
7. To add additional search parameters, expand the **Options** pane:



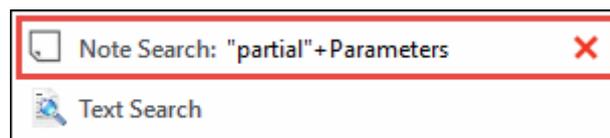
8. If desired, enter a date range using the **From** and **To** fields in the **Note Creation Date Range** search parameter. Entering dates into these fields will limit your search to notes created within that range. You can use the corresponding calendars to select a date. If no range is specified, OnBase searches for notes created on any date within the selected Document Type(s).
9. If desired, use the **Note Owner** field to specify 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).
10. If desired, use the **Note Type** field to specify the type of note you are searching for. If no Note Type is specified, OnBase searches for notes of any type within the selected Document Type(s).  
If necessary, you can clear search parameters by clicking **Clear Search**:



11. Click outside the **Note Search** window, or click **Close**:



12. The **Note Search** window closes and the **Note Search** field displays in the **Document Retrieval** pane:



13. If you specified note text to search for in the **Note Search** window's **Find What** field, the **Note Search** field contains this text enclosed by quotation marks. If you specified additional search criteria in the **Note Search** window, the **Note Search** field contains **+Parameters**.

You can edit the note search by clicking the **Note Search** hyperlink.

You can remove the note search by clicking the following button:



14. Press the Enter key or click **Find**:



15. When the search is finished, OnBase displays all matching documents in a Document Search Results list.
16. Open a document. The document is displayed in the Document Viewer.

## 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:** User rights are needed to access the **Document Retrieval** layout and to view documents. Contact your system administrator for additional information.

---

1. In the **Home** tab, click **Retrieval**.
2. The **Document Retrieval** layout is opened. Ensure that the **Document Retrieval** pane is expanded:

**Document Retrieval**

**Document Types and Groups** ✕

<All> ▼

- AP - Checks ▲
- AP - Credit Memo ■
- AP - Non PO Vendor Invoice
- AP - Packing Slip
- AP - Purchase Order
- AP - Purchase Requisition (E-Form)
- AP - Vendor Invoice
- AR - Aging Report
- AR - Customer Agreement ▼

---

**Keywords and Date Range** ✕

From  To

Note Search

Text Search

3. Select the Document Type Group(s) and/or Document Type(s) to search.
4. Click the **Text Search** hyperlink.
5. The **Text Search** window is displayed:

**Text Search: ✕**

Options

6. In the **Find What** 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. Use the drop-down list to select from previous text searches.
7. To add additional search parameters, expand the **Options** pane:

8. Select a **Type** Radio Button:
  - **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 **2009 and 2010** to find documents containing both 2009 and 2010.  
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.

---

**Note:** External text searching for currency is not supported.

---

9. Select one of the following check boxes if necessary:
  - Select **Find First** to search for the first instance of the text.
  - Select **Use Wildcards** to include wild card characters in your text string search criteria.

- Select **Case Sensitive** to return only matches that have the same capitalization as the text string search criteria.
- Select **Whole Word Match** to return matches for an exact word.
- Select **Column Search** to search for a text string within specified columns. In the **From** field, 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. In the **To** field, 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.

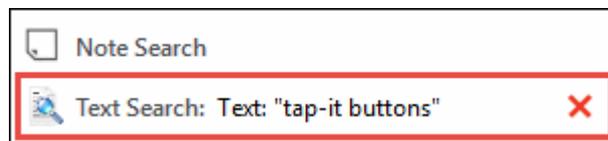
If necessary, you can clear search parameters by clicking **Clear Text Constraints**:



10. Click outside the **Text Search** window, or click **Close**:



11. The **Text Search** window closes and the **Text Search** field displays in the **Document Retrieval** pane:



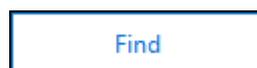
12. The **Text Search** field contains the **Type** of search selected in the **Text Search** window, followed by the entry in the **Find What** field.

You can edit the text search by clicking the **Text Search** hyperlink.

You can remove the text constraints by clicking the following button:



13. Press the Enter key or click **Find**:



14. When the search is finished, OnBase displays all matching documents in an External Text Search Results window.

15. Open a document. The document is displayed in the Document Viewer. The page of the document containing the text string you searched for is displayed.

## Viewing Recent Query History

The query history displays a list of Document Retrieval and Custom Query searches performed during the current OnBase session.

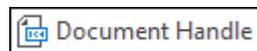
To view the query history:

1. On the **Home** tab, in **Documents**, click **Query History**.
2. The **Query History** pane is displayed.
3. To repeat a previous search, click an item from the list.
4. The search results list is displayed in a new window.

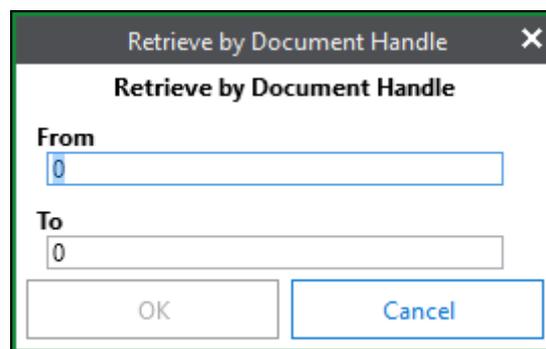
## Document Retrieval by Document Handle

If you have the **Retrieve by Document Handle / File Name** product right, you can retrieve documents by their Document Handles. A Document Handle is a unique number assigned to each document.

1. On the **Home** tab, in the **Documents** ribbon group, click **Document Handle**:



2. The **Retrieve by Document Handle** dialog box is displayed:

A dialog box titled 'Retrieve by Document Handle' with a close button (X) in the top right corner. The dialog contains two text input fields: 'From' and 'To', both containing the number '0'. Below the fields are two buttons: 'OK' and 'Cancel'.

3. Enter numeric search criteria and click **OK**.
  - Enter a range of numbers in the **From** and **To** fields to retrieve all documents within that range, or
  - Enter a number in the **From** 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.

## 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:

The screenshot shows a form with five fields, each with a blue '=' icon to its right. The fields are: 'Name' (text input), 'Position Applied' (text input), 'State' (dropdown menu), 'County' (dropdown menu), and 'City' (dropdown menu). The 'State', 'County', and 'City' dropdown menus are currently empty, indicating a cascading relationship where child values depend on parent values.

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 called **AP - Purchase Order** contains a Multi-Instance Keyword Type Group called **Item** that includes the Keyword Types **Item Number**, **Item Description**, **Quantity**, **Amount** and **Total Amount**. A Multi-Instance Keyword Type Group was configured for the Document Type, because a purchase order is likely to contain more than one item, each requiring a separate group of Keyword Values.

If you were to search for the Keyword Value **0023426** for the **Item Number** Keyword Type and the Keyword Value **3/4 IN. NAILS - 100** for the **Item Description** Keyword Type, a document retrieval would only retrieve documents that contained both Keyword Values either in the same instance of a Keyword Type Group or as standard Keyword Values values (i.e., values that are not part of a Keyword Type Group). It would not retrieve documents that only contained the values collectively across different Keyword Type Groups.

For example, the following documents contain the same Keyword Values but were indexed differently:

- Document A was configured with the **Item** Multi-Instance Keyword Type Group and was indexed with two Keyword Type Group instances.
- Document B was configured with loose Keyword Types and was indexed with multiple values for **Item Number**, **Item Description**, **Amount** and **Total Amount**.

**Document Information Panel** ✕

**Document Type** A  
 AP - Purchase Order

**Document**  
 Purchase Order PURCHASE ORDER 109343 for DRIFTWOOD SUPPLIES in the amount of \$64.50

**Document Date**

⤴ **Keywords**

Name

⤴ **Item Number**

Item Number

Item Description

Quantity

Amount

Total Amount

⤴ **Item Number**

Item Number

Item Description

Quantity

Amount

Total Amount

**Document Information Panel** ✕

**Document Type** B  
 AP - Purchase Order

**Document**  
 Purchase Order PURCHASE ORDER 109343 for DRIFTWOOD SUPPLIES in the amount of \$64.50

**Document Date**

⤴ **Keywords**

Name

Item Number

Item Number

Item Description

Item Description

Quantity

Amount

Amount

Total Amount

Total Amount

A single document retrieval for both **Item Number** Keyword Value **0023426** and **Item Description** Keyword Value **3/4 IN. NAILS - 100** would not find Document A, since the Keyword Values **0023426** and **3/4 IN. NAILS - 100** are not part of the same Keyword Type Group instance. It would find Document B, since those values are not tied to any Keyword Type Group.

## 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 file.

The two most common file formats are image documents and text documents. Other file formats 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.

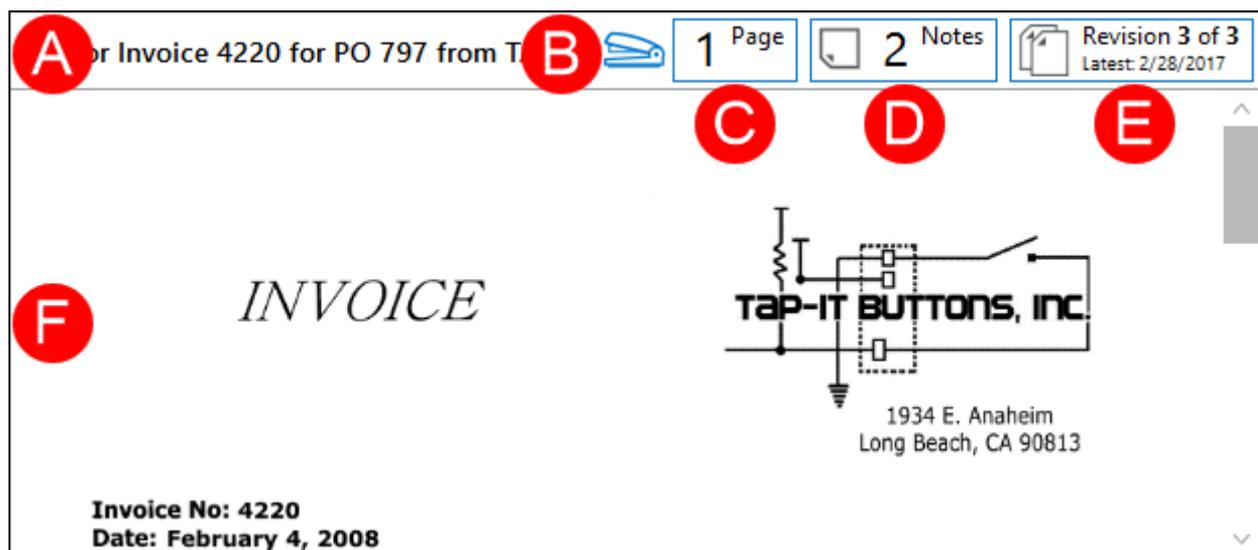
---

**Note:** Some file formats ask for your permission before opening. These documents may contain scripts or executables. Opening these documents within Unity Client executes the script or executable. Take caution when opening unfamiliar documents.

---

## Document Viewer

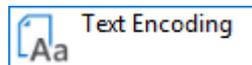
When you open a document, it is displayed in the Document Viewer. The document's Auto-Name string, page count, note count (if applicable), and revision number (if applicable) are displayed in the information bar above the document.



Item	Description
A	Auto-Name String
B	Stapler
C	Page Count

Item	Description
<b>D</b>	Note Count
<b>E</b>	Revision Number
<b>F</b>	Document

If the document being viewed is a Text, HTML, or HTML Unicode file format, **Text Encoding** is available. Select an option from the drop-down menu to change the text encoding, and select **Save Encoding** to save the change.



If the document is read-only and cannot be modified, the following icon is displayed above the document:



Hover over this icon to display information about why the document is read-only. For more information, see [Document Locks on page 309](#).

---

**Note:** If the Document Type is configured with the Rendition / Revision Control Setting **Display Message when Document is Locked** enabled, you are prompted when opening the document.

---

Depending on the Document Type and your rights, you might see different ribbon tabs, ribbon groups, icons and other graphics that indicate the presence of notes or annotations.

If you have an alternate viewer configured, such as the Google Services Integration viewer or the Microsoft Office Online Server WOPI viewer, you may be presented with a button to switch viewers.

---

**Note:** With alternate viewers, OLE and RTF documents are viewed as PDFs, regardless of file type. File type is not changed, despite being rendered as PDFs for viewing purposes within the Unity Client.

---

If changes are made to a document and the document is navigated away from without being saved, you will be prompted to save, discard, or cancel your changes.

---

**Note:** Some documents created in third-party applications (for example, Microsoft Outlook MSG files) may open externally in their native applications. Other types of documents created in third-party applications (for example, Microsoft Office files) may open within the Document Viewer, using an embedded viewer based on the third-party application. See the third-party application's help files for information on these types of documents and their options.

---

**Note:** Not all Microsoft Office application functionality is available for Microsoft Office documents opened in the embedded Document Viewer. For access to full Microsoft Office application functionality, these documents must be opened using the Office Business Application module.

---

**Note:** The Unity Client Document Viewer does not support viewing XML documents imported as Microsoft Office file types. For more information, contact your system administrator.

---

**Note:** When opening a Zipped HTML Archive for the first time, a message is displayed stating that the document is being prepared. After the zipped file has been prepared, the progress of the archive download is shown. Click **Cancel** to cancel the unzipping process. **Enable Dynamic Document Content** must be selected in the settings for the Document Type.

---

**Caution:** When working with a Microsoft Excel file in the Unity Client, you will not be prompted to save if only one cell has been modified. The document is not marked as modified until you navigate to another cell. Care should be taken to ensure your changes have been saved. This is a known issue.

---

When viewing documents, the following keyboard shortcuts are available:

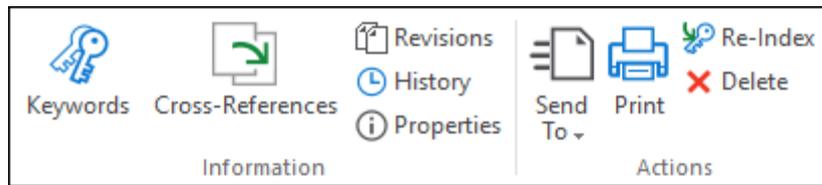
Keyboard Shortcut	Description
<b>Ctrl + H</b>	Opens the <b>Document History</b> dialog.
<b>Ctrl + P</b>	Opens the <b>Print</b> pane.
<b>Ctrl + K</b>	Opens the <b>Add/Modify Keywords</b> pane.
<b>Ctrl + W</b>	Opens the <b>Cross-References</b> pane.
<b>Ctrl + U</b>	Toggles the thumbnail display.
<b>Ctrl + O</b>	Toggles text overlay when working with image documents.

Keyboard Shortcut	Description
<b>Ctrl + Mouse Wheel Up</b> or <b>Ctrl and +</b>	While holding down the <b>Ctrl</b> button, scroll the mouse wheel up to zoom in on the current document. Or press the <b>+</b> key while holding down the <b>Ctrl</b> button to zoom in.  <b>Note:</b> The <b>Ctrl</b> and <b>+</b> shortcut is not usable when working within a text document. Use the <b>Ctrl + Mouse Wheel Up</b> shortcut to zoom in on text documents.
<b>Ctrl + Mouse Wheel Down</b> or <b>Ctrl and -</b>	While holding down the <b>Ctrl</b> button, scroll the mouse wheel down to zoom out on the current document. Or press the <b>-</b> key while holding down the <b>Ctrl</b> button to zoom out.  <b>Note:</b> The <b>Ctrl</b> and <b>-</b> shortcut is not usable when working within a text document. Use the <b>Ctrl + Mouse Wheel Down</b> shortcut to zoom in on text documents.
<b>Ctrl + Page Up</b> or <b>F11</b>	Go to the previous page in a multi-page document.
<b>Ctrl + Page Down</b> or <b>F12</b>	Go to the next page in a multi-page document.
<b>Ctrl + Home</b>	Go to the first page in a multi-page document.
<b>Ctrl + End</b>	Go to the last page in a multi-page document.
<b>Ctrl + Shift + Page Up</b>	Go to the previous document in the Document Search Results list.
<b>Ctrl + Shift + Page Down</b>	Go to the next document in the Document Search Results list.
<b>Ctrl + G</b>	Opens the <b>Go to Page</b> dialog box.
<b>Ctrl + Right Arrow</b>	Rotates the currently selected pages 90 degrees clockwise.
<b>Ctrl + Left Arrow</b>	Rotates the currently selected pages 90 degrees counterclockwise.
<b>Ctrl + Down Arrow</b>	Rotates the currently selected pages 180 degrees.

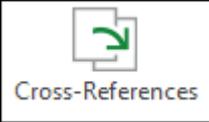
When viewing a multi-page image document, navigation through and between pages can be performed using the following methods:

- Scroll the mouse wheel up or down.
- Press **Page Up** or **Page Down**.
- Press the up or down arrow keys.

## Document Tab



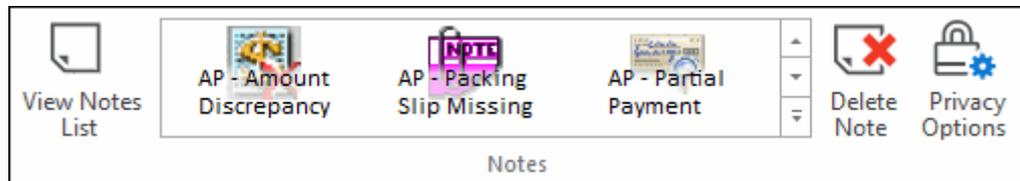
The **Document** tab allows you to manage documents more efficiently. If you have sufficient privileges, you may have access to any of the following ribbon groups and/or buttons:

Information	Description
	<p><b>Keywords</b> displays the <b>Add/Modify Keywords</b> pane in the task pane. See <a href="#">Access the Keyword Values of a Document on page 153</a> for more information.</p> <hr/> <p><b>Tip:</b> When the <b>Add/Modify Keywords</b> pane is displayed, you can easily view the document's notes and cross-references by selecting the corresponding tab.</p> <hr/>
	<p><b>Cross-References</b> displays the <b>Cross-References</b> pane in the task pane. See <a href="#">Retrieving Cross-Referenced Documents on page 134</a> for more information.</p> <hr/> <p><b>Tip:</b> When the <b>Cross-References</b> pane is displayed, you can easily view the document's keywords and notes by selecting the corresponding tab.</p> <hr/>
	<p><b>Revisions</b> displays the <b>Revisions and Renditions</b> dialog box.</p> <p>If a Document Type is configured to allow multiple renditions of a document and you have rights to view renditions, the <b>Revisions and Renditions</b> dialog box displays any renditions. 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.</p> <p>Double-click a rendition in the <b>Revisions and Renditions</b> dialog box to view it.</p> <p>You can also open the <b>Revisions and Renditions</b> dialog box by right-clicking a document selected in a Document Search Results list or an open text or image document and selecting <b>Revisions/Renditions</b>.</p> <hr/> <p><b>Note:</b> If you are licensed for EDM Services, the <b>Revisions and Renditions</b> dialog box also includes information on revisions. For information on using revisions, see the EDM Services documentation.</p> <hr/>
	<p><b>History</b> displays the <b>Document History</b> dialog box. See <a href="#">Document History on page 137</a> for more information.</p>
	<p><b>Properties</b> displays the <b>Document Properties</b> dialog box. See <a href="#">Document Properties on page 138</a> for more information.</p>

Actions	Description
	<p><b>Send To</b> displays the following options:</p> <ul style="list-style-type: none"> <li>• <b>Mail Recipient (As Attachment)</b> sends the document or a link to the document to a user via external mail. See <a href="#">Emailing Documents and Links to Documents on page 260</a> for more information.</li> <li>• <b>Internal User</b> sends the document to a user via internal mail. See <a href="#">Send To   Internal User on page 250</a> for more information.</li> <li>• <b>Copy Hyperlink</b> copies to the clipboard a hyperlink to the document.</li> <li>• <b>My Personal Page</b> sends the document to a tile on your Personal Page. See <a href="#">Personal Page on page 28</a> for more information.</li> <li>• <b>Tile Groups</b> adds the document to the selected Tile Group.</li> <li>• <b>Envelope</b> displays the <b>Envelope</b> pane in the task pane. See <a href="#">Using Envelopes on page 272</a> for more information.</li> <li>• <b>Create New Document</b> displays the <b>Create New Document</b> dialog box. See <a href="#">Creating a Document on page 148</a> for more information.</li> <li>• <b>File</b> displays the <b>File</b> pane in the task pane. See <a href="#">Saving Documents to Files on page 142</a> for more information.</li> <li>• <b>Document Separation</b> sends the document to the Document Separation workspace.</li> </ul> <hr/> <p><b>Note:</b> This option is not available during indexing.</p> <hr/> <p>See <a href="#">Separating Image and PDF Documents on page 181</a> for more information.</p>
	<p><b>Print</b> displays the <b>Print</b> dialog box. See <a href="#">Printing Documents on page 298</a> for more information.</p>
	<p><b>Re-Index</b> displays the <b>Re-Index</b> pane in the task pane. See <a href="#">Re-Indexing Documents on page 173</a> for more information.</p>
	<p><b>Delete</b> removes the document from OnBase. See <a href="#">Deleting Documents on page 147</a> for more information.</p>

## The Notes Gallery

If you have sufficient privileges, you can view notes and create notes and annotations on documents using the **Notes** gallery.



**View Notes List** displays the **Notes** pane in the task pane.

Your five most frequently used note types will be displayed at the front of the list.

**Tip:** When the **Notes** pane is displayed, you can easily view the document's keywords and cross-references by selecting the corresponding tab.

Scroll through the available notes and annotations using the following buttons:



To display all available notes and annotations, click the following button:



**Tip:** To display the name of a note in the **Notes** gallery, rest the mouse cursor over the desired note. This is helpful when the full name of the note is not displayed due to length restrictions.

**Delete Note** deletes the selected note or annotation.

**Privacy Options** sets the note privacy options for the selected note. For more information, see [Setting Note Privacy Options on page 114](#).

**Note:** Notes and annotations placed on text documents snap to the nearest character when moved or resized. Due to this functionality, notes and annotations may slightly shift after creation to snap to the nearest row and column position.

## Notes

**Note:** Notes are limited to 250 characters.

Notes are available from the **Notes** gallery when a document is opened in the OnBase viewer or selected in the Document Search Results list.

1. On the **Document** tab, in **Notes**, select the type of note.
2. If you are adding a note to an open text or image document, click on the document to place the note. The note is displayed and expanded on the document. Type text in the note's text field as necessary.  
If you are adding a note to a document in the Document Search Results list, or an open OLE document or E-Form, the **Notes** pane is displayed. If necessary, type text for the note. Click **Close**.
3. To delete a note, perform one of the following:
  - Select the note and click **Delete Note** in the **Notes** gallery.
  - Right-click the note in the **Notes** pane and select **Delete Note**.

---

**Note:** To toggle whether all notes are shown or not, right-click and select **Show / Hide Notes in Viewer**.

---

## Annotations

Annotations are available from the **Notes** gallery when a document is opened in the OnBase Viewer. Annotations are not available from the **Notes** gallery when a document is selected in the Document Search Results list. This is because annotations have to be drawn on documents.

---

**Note:** Annotations cannot be placed on HTML or OLE documents.

---

1. From an open document, select the type of annotation from the **Notes** gallery.
2. Define the location and size of the annotation by clicking and dragging the cursor over the document. Release the mouse button when finished to display the annotation.

---

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

---

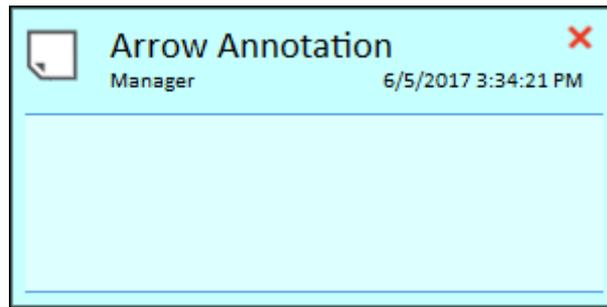
To create multiple annotations of the same type without returning to the **Notes** gallery, hold down the **Ctrl** key while clicking and dragging. Release the **Ctrl** key or right-click to exit the Note creation mode. This functionality only applies to annotations that do not prompt you to add text upon creation. For more information, see your system administrator.

---

**Note:** Depending on your system configuration, some icon stamps may only require you to click the appropriate location on the document, instead of clicking and dragging. See the **Creating Note** instructions that are displayed at the top of the document when applying a note to determine whether this applies. Icon stamps that behave this way cannot be repeatedly applied by holding the **Ctrl** key and clicking.

---

3. Depending on the annotation's configuration, you may be prompted to add text to the annotation:



- a. Type text for the annotation.
- b. When you have finished typing text, click the following to close the window:

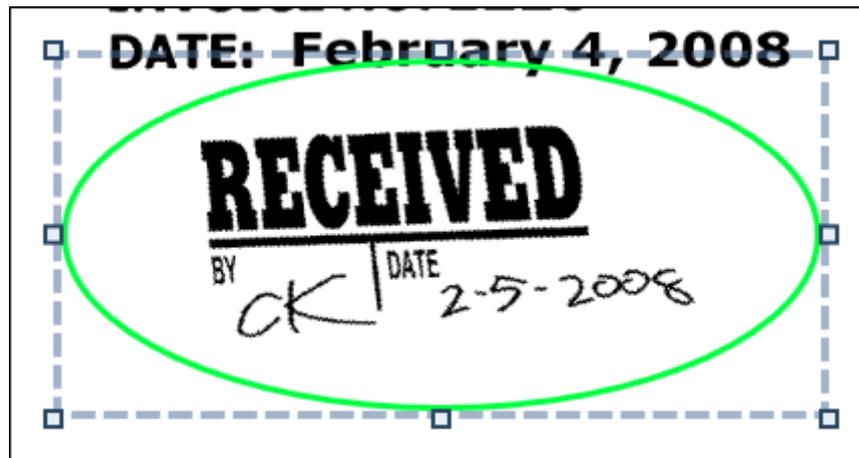


- c. The annotation now includes the following button:



This button is only available the first time the annotation is selected. If necessary, click this button to edit the annotation's text. If this button is not available, you can edit the annotation's text from the **Notes** pane.

4. Depending on your system's configuration, you may be able to resize or move annotations after placing them on a document. Annotations that can be resized or moved appear like the following annotation:



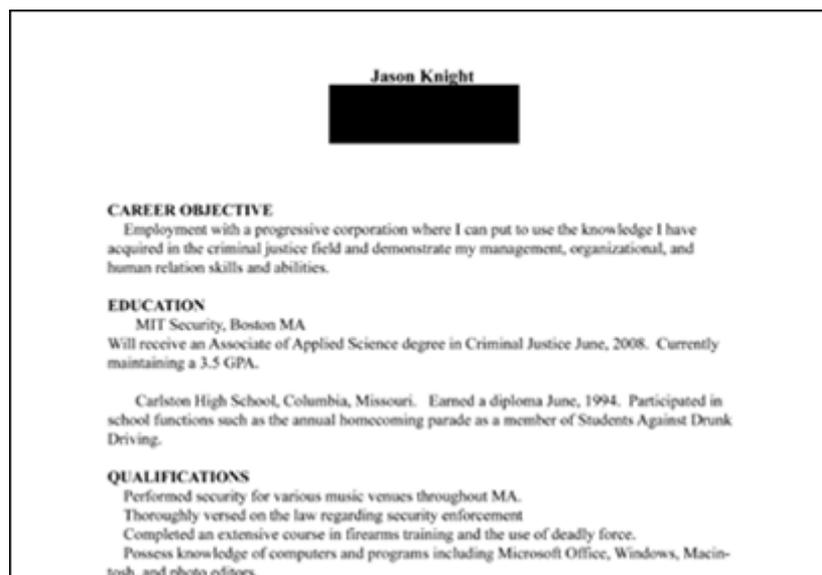

---

**Note:** To toggle whether all annotations are shown or not, right-click and select **Show / Hide Annotations in Viewer**.

---

## Redacting Documents Using Redaction Annotations

A redaction is a special kind of annotation used to hide confidential information on an image 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 documents whose Document Types are configured to allow redactions. See your system administrator to verify whether a Document Type has been configured for redactions.

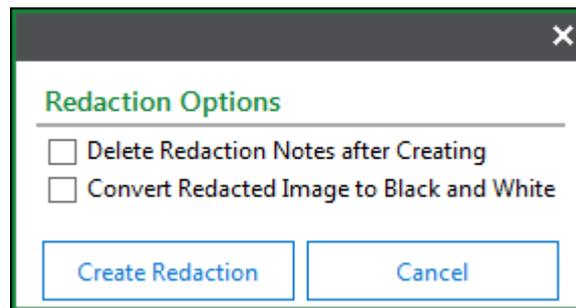
A redaction cannot be deleted (or undone) once it has been saved. When a redaction is saved, the redacted document is stored either as a new document in another Document Type or as a revision of the current document. How the redacted document is stored depends on your system's configuration.

### 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 is image.
- The document's Document Type is configured to allow redactions.

1. On the **Document** tab, click the **Notes Gallery**.
2. Select a redaction annotation.
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. Right-click the image and select **Redactions | Create New Redaction**.
5. The **Redaction Options** dialog box is displayed:



6. Select the **Delete Redaction Notes after Creating** check box if OnBase should delete redaction notes from the document after creating the new redaction.
7. Select the **Convert Redacted Image to Black and White** check box if OnBase should convert color images to black and white after performing the redaction.
8. Click **Create Redaction**.

---

**Note:** If configured, you may be asked to provide a comment before saving the document with redactions.

---

9. OnBase displays a message indicating that the redacted document has been created. If OnBase indicates that the redaction could not be saved, the Document Type may not be configured for redactions.

---

**Note:** Redactions cannot be saved on an Image Rendered PDF.

---

10. The redacted document is displayed. Depending on your system's settings, this redacted document is either saved to another Document Type, saved as a revision of the current document, or the existing document is replaced by the redacted document. Depending on your system's settings, the original document may also be deleted.

---

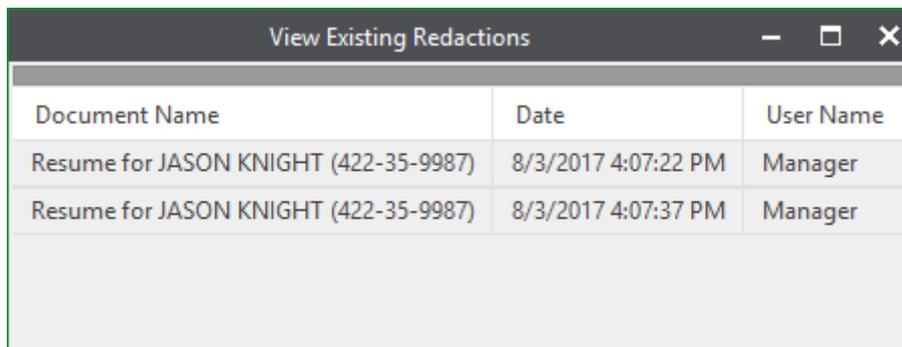
**Caution:** If you are using EDM Services, clicking **Save** on the **Markups** tab will also save any redactions you have added to the document.

---

### Viewing Redactions

If your system is configured to save redacted documents to another Document Type, you can view existing redactions for the original document from a Document Search Results list or the open document:

1. Right-click the original document.
2. Select **Redactions | View Existing Redactions**.
3. The **View Existing Redactions** dialog box is displayed:



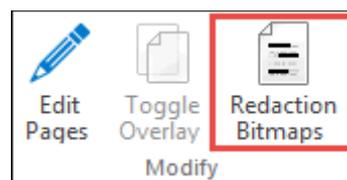
Document Name	Date	User Name
Resume for JASON KNIGHT (422-35-9987)	8/3/2017 4:07:22 PM	Manager
Resume for JASON KNIGHT (422-35-9987)	8/3/2017 4:07:37 PM	Manager

4. Double-click a document to open it.

### Redacting Documents Using Bitmap Redactions

In addition to standard redactions, images can also be redacted using a bitmap image (Redaction Bitmap), which is burned permanently into the image document. Redacted images can be used to create tamper-proof markings, such as a signature, or a check mark on a drug test result form.

If the Document Type has been configured for Redaction Bitmaps, you can apply and manage Redaction Bitmaps with the **Redaction Bitmaps** button in the **Modify** ribbon menu group.




---

**Note:** Before entering or exiting **Redaction Bitmaps** mode, you may be prompted to discard unsaved changes to the document.

---

### Navigating in the Bitmap Redaction Tab

In the Redaction Bitmap tab, use the **Previous** and **Next** buttons to browse through the Redaction Bitmaps on a document.

Use the **Hand Tool** to pan or scroll the document in any direction.



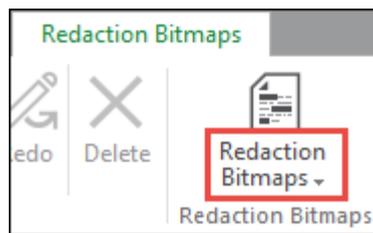
Use the **Select All** button to select all Redaction Bitmaps on the document.



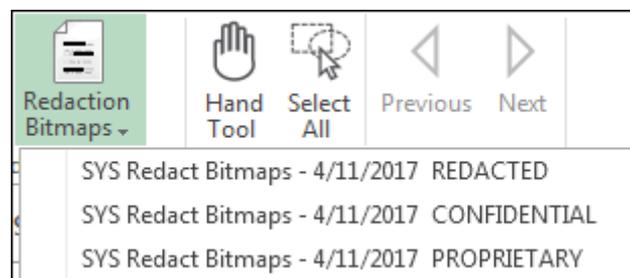
### Applying a Redaction Bitmap

To add a Redaction Bitmap to an open document:

1. Click **Redaction Bitmaps** in the **Modify** group of the ribbon menu.
2. The **Redaction Bitmaps** tab is opened. Click the **Redaction Bitmaps** drop-down.



3. Select a Redaction Bitmap to place it on the document.



4. Add and adjust additional Redaction Bitmaps, if necessary.

- When Redaction Bitmaps have been positioned correctly, click the **Save** button to save all Redaction Bitmap changes on the document.



---

**Caution:** Ensure you are satisfied with the bitmap before performing this step. Performing this action makes the bitmap a permanent part of the document, and it can no longer be moved or deleted.

---

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

---

**Note:** Creating a redacted image from a redaction bitmap differs from creating a redacted image using a redaction annotation. When you create a redacted image using a redaction annotation, a rendition is created. This means you can view the original document, as well as the redacted rendition. Depending on your system's configuration, when you create a redacted image using a redaction bitmap, the redaction is burned directly into the original document and a rendition is not created. For additional information, see your system administrator.

---

### *Deleting a Redaction Bitmap*

You can delete the selected Redaction Bitmap from a document as long as it has not been saved to the document. To delete a Redaction Bitmap, select the Redaction Bitmap you would like to delete and click **Delete**:



## Working with Notes in the Document Viewer

Users with the appropriate privileges can view and interact with notes on a document using the Document Viewer.

## Viewing Notes

Depending on your configuration, existing notes applied to a document are displayed on the document.

Notes are displayed on documents as an icon:



To view the properties and contents of a note, hover over the note icon or double-click it to open it:



---

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

---

## Showing and Hiding Notes

Depending on your configuration, notes and annotations may be shown or hidden on documents by default. To show or hide notes and annotations on the document, right-click on the document and select one of the following:

- **Show / Hide Notes and Annotations in Viewer**
- **Show / Hide Notes in Viewer**
- **Show / Hide Annotations in Viewer**

## Moving Notes

To move a note, click and drag the note icon on the document. Release the mouse button when you have moved the note to its new position. The new position is saved automatically.

---

**Note:** You cannot move notes outside of 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.

## Deleting Notes

To delete a note, right-click the note icon or the note and select **Delete Note**. Click **Yes** to confirm that you want to delete the note.

## Setting Note Privacy Options

To set privacy options on a note, right-click the note icon or the note and select **Privacy Options**. Proceed to step 5 in [Setting Note Privacy Options on page 114](#).

## Working with Notes in the Task Pane

Ensure you have appropriate privileges for viewing, modifying, or deleting notes. Note the following:

- If you have the **Create** privilege for a Note Type but do not have the **View** privilege for that Note Type, you can create a note of that Note Type on a document. However, once the document is closed, you are no longer able to view the note you created.
- If you have the **Create** privilege for a Note Type but do not have the **Modify** privilege for that Note Type, you can modify the note's text and position only during the same viewing session in which you created the note. Once the document is closed, 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 once the document is closed.

Notes may contain messages that can be displayed and edited. If you have appropriate privileges, you can delete notes.

---

**Note:** Notes can be added using the **Document** tab's **Notes** gallery.

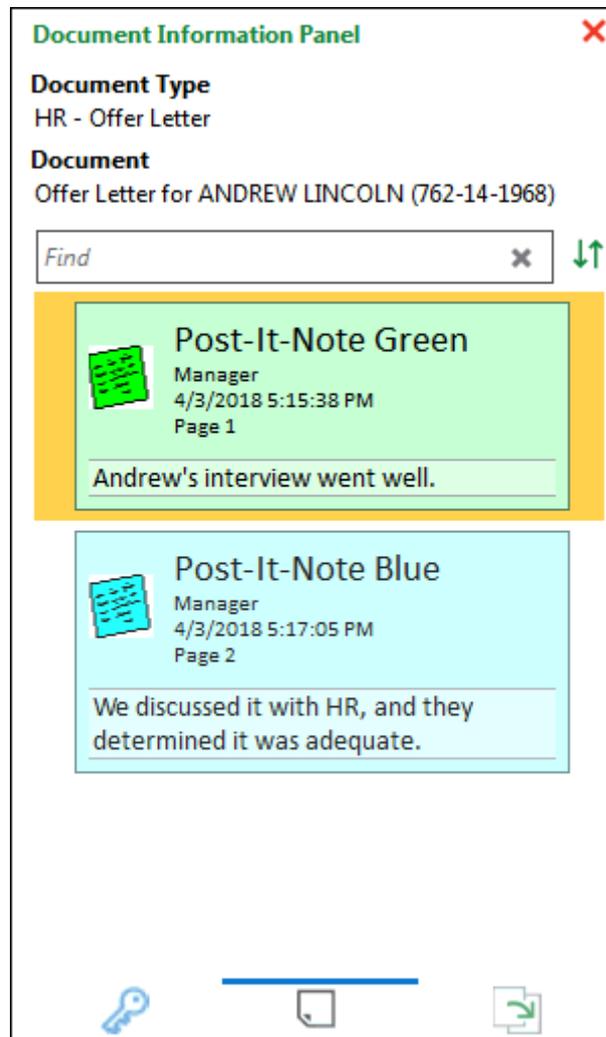
---

## Viewing and Editing Notes

To view and edit notes:

1. Perform one of the following:
  - Click **View Notes List** on the **Document** tab.
  - Right-click on the information bar of the document and select **View Notes List**.
  - Click the note count displayed on the information bar of the document.

The **Notes** pane is displayed on the **Document Information Panel**:



2. To search for specific text contained in the document's notes, enter text in the **Find** field. The **Notes** pane automatically displays any notes matching your search criteria. To clear search criteria, click the **X** in the **Find** field.

- To sort the document's notes, click the following button:



The following sort options are available:

Sort Option	Description
<b>None</b>	The document's notes are not sorted.
<b>Created By (Ascending)</b>	The document's notes are sorted by the name of the user that created the note, in ascending order.
<b>Created By (Descending)</b>	The document's notes are sorted by the name of the user that created the note, in descending order.
<b>Created Date (Ascending)</b>	The document's notes are sorted by the date and time that the note was created, in ascending order.
<b>Created Date (Descending)</b>	The document's notes are sorted by the date and time that the note was created, in descending order.

- Select the note to edit.
- Edit the contents of the note.

Right-click for the following text-editing options:

Option	Shortcut	Description
<b>Cut</b>	<b>Ctrl + X</b>	Click to remove selected text and place it on the clipboard.
<b>Copy</b>	<b>Ctrl + C</b>	Click to retain selected text and place it on the clipboard.
<b>Paste</b>	<b>Ctrl + V</b>	Click to insert the text from the clipboard at the location of the cursor.

- Click anywhere outside of the note text-editing area to save your changes.

---

**Note:** Changes to notes are saved automatically when you click outside of the note text-editing area. If the document is closed while the cursor is still in the text-editing area of a note, changes to the note may not be saved.

---

- Click the red **X** to close the **Document Information Panel**.

## Deleting a Note

To delete a note:

- Click **View Notes List** on the **Document** tab, right-click and select **View Notes List**, or click the note count displayed above the document.
- The **Notes** pane is displayed.

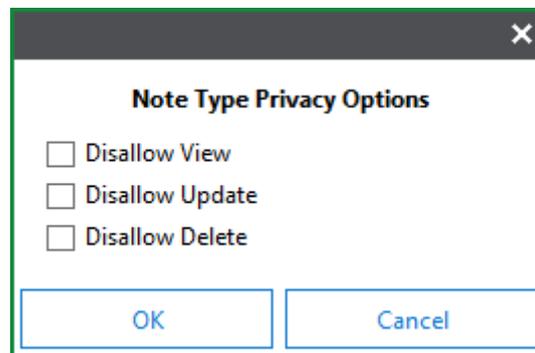
3. Select the note to delete.
4. Click the **Delete Note** button in the **Notes** gallery, or right-click the note and select **Delete Note**.
5. Click **Yes** when prompted to confirm.
6. Click **Close** to close the **Notes** pane.

## Setting Note Privacy Options

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

To set note privacy options:

1. Click **View Notes List** on the **Document** tab, right-click and select **View Notes List**, or click the note count displayed above the document.
2. The **Notes** pane is displayed.
3. Select the note.
4. On the **Document** tab, in **Notes**, click **Privacy Options**, or right-click the note and select **Privacy Options**.
5. The **Note Type Privacy Options** window is displayed:



6. Select any of the following options:

Note Type Privacy Options	Descriptions
<b>Disallow View</b>	Prohibits all other users from viewing the note. <hr/> <b>Note:</b> If this option is selected, other users can still successfully search for text in the note, though they will not be able to view the note. <hr/>
<b>Disallow Update</b>	Prohibits all other users from editing the note.
<b>Disallow Delete</b>	Prohibits all other users from deleting the note.

---

**Note:** Users with administrative rights will always be able to view, update, and delete your notes.

---

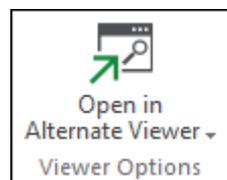
7. Click **OK**.

## Viewer Options

### Google Services Integration Viewer

When working with documents uploaded through Google Services Integration, documents are previewed as PDFs. The Google Services Integration viewer previews documents in a Read Only state, and a lock is not placed on the document unless you switch to an alternate viewer. An additional button is available on the **Document** tab when working with these documents.

The **Open in Alternate Viewer** button is available in the **Viewer Options** ribbon menu group:



If you do not want to view documents as PDFs in the Google Services viewer, documents can instead be opened in Office or in the embedded Unity Client viewer.

To open documents in Office:

1. Click the **Open in Alternate Viewer** button.
2. Select **Open in Office**. The document will open in its native Office application.

---

**Note:** The **Open in Office** option is only available when viewing OLE documents. This option is only available if the Unity Client is integrated with a Microsoft Office Online Server.

---

To open documents in the Embedded Viewer:

1. Click the **Open in Alternate Viewer** button.
2. Select **Open Embedded Viewer**. The document will open in the Unity Client Embedded Viewer.

## Microsoft Office Online Integration Viewer

When working with OLE (Office) documents in the Unity Client, the Microsoft Office Online Integration may be used. When the Unity Client is integrated with a Microsoft Office Online Server, Office documents are viewed in an alternate viewer: the Web Application Open Platform Interface (WOPI) viewer. An additional button is available on the Document tab when working with these documents.

---

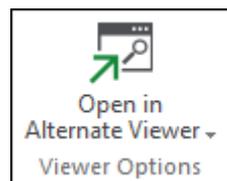
**Note:** Office documents flagged as read-only cannot be previewed during upload in the WOPI viewer.

---

**Note:** If the Office Business Application for 2007, 2010, or 2013 is installed and the WOPI viewer is configured, the WOPI viewer takes precedence and the documents will be viewed in the WOPI viewer instead of the native Office application.

---

The **Open in Alternate Viewer** button is available in the **Viewer Options** ribbon menu group:



---

**Note:** The **Open in Alternate Viewer** option is only available when viewing OLE documents. This option is only available if the Unity Client is integrated with an Office Online Server.

---

If you do not want to view OLE documents in the WOPI viewer, documents can instead be opened in Office or in the embedded Unity Client viewer.

To open documents in Office:

1. Click the **Open in Alternate Viewer** button.
2. Select **Open in Office**. The document will open in its native Office application.

To open documents in the Embedded Viewer:

1. Click the **Open in Alternate Viewer** button.
2. Select **Open Embedded Viewer**. The document will open in the Unity Client Embedded Viewer.

## View in Native Format

When an email document is viewed as an image in the Document Viewer, it can be opened externally in its native application by selecting **View in Native Format**.

---

**Note:** The **View in Native Format** option is only available when viewing .EML and .MSG documents. The user option **Open email documents as images** must be selected. For more information, see [Document on page 50](#).

---

## Staples

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

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

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

---

**Tip:** The **Staple** window can also be viewed in the Notes list on the **Document Information Panel** of an open document.

---

When using Staples, consider the following:

- The Staple icon and **Staple** window are placed on the primary document, and a Back Staple icon and **Back Staple** window are placed on secondary documents.
- For documents consisting of multiple revisions, Staple icons appear on all revisions. When viewing a stapled document from any revision of an open document, the latest available revision of the stapled document is displayed.
- When viewing a stapled document from its associated document, the stapled document is opened to the page on which the Staple was placed.
- When a Staple on a document is deleted, the corresponding Staple on the stapled document is not deleted. The corresponding Staple on the stapled document must be deleted separately.
- When printing a document, Staple icons will not be printed when selecting **Note Icon/Annotation on Document** in the **Print Settings**.

## Stapling Open Documents from the Information Bar

If you have sufficient rights, you can staple two open documents together. To staple two open documents together from the information bar:

1. Open two documents in separate windows.
2. Click and drag the stapler icon from the information bar of the secondary document to the information bar of the primary document:



3. A Staple icon is displayed on the primary document:



A Back Staple icon is displayed on the secondary document:



## Stapling Documents from a Document Search Results List

If you have sufficient rights, you can staple a secondary document in the Document Search Results list to an open primary document. To staple documents together from the Document Search Results list:

1. Open the primary document to which other documents will be stapled.

---

**Note:** Dragging from the Document Search Results list to the embedded internal Document Viewer is not supported.

---

2. Select the secondary document(s) in the Document Search Results list.
3. Click and drag the selected document(s) to the information bar of the primary document.
4. A Staple icon is displayed on the primary document:



5. Open the secondary document(s). A Back Staple icon is displayed on the secondary document(s):



## Viewing Stapled Documents

When viewing stapled documents, consider the following:

- Stapled documents are opened to the page on which the staple was placed.
- When viewing a stapled document from any revision of an open document, the latest available revision of the stapled document is displayed.
- If the stapled document has been deleted, an error message is displayed.

To view a stapled document:

1. From an open document, click the Staple icon. The **Staple** window is displayed:



2. To view the document stapled to the open document, right-click on the open document and select **View Stapled Document** or click the **View Stapled Document** button from the **Staple** window:



## Moving Staples

To move the Staple icon on a document, click and drag the icon to the new location. The new location of the Staple icon is automatically saved.

## Editing Staple Notes

To edit Staple note text on an open document:

1. Click the Staple icon on the document. The **Staple** window is displayed:



2. In the text-editing area of the Staple note, edit the text as needed.
3. Click anywhere outside of the text-editing area to save changes.

---

**Note:** Changes to Staple note text are saved automatically when you click outside of the text-editing area. If the document is closed while the cursor is still in the text-editing area of a Staple note, changes to the Staple note may not be saved.

---

## Deleting Staples

To delete a staple on an open document:

1. Right-click on the Staple icon or **Staple** window and select **Delete Note**.
2. On the confirmation dialog box, click **Yes**. The Staple is deleted.

---

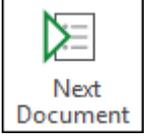
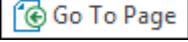
**Note:** When a Staple on a document is deleted, the corresponding Staple on the stapled document is not deleted. The corresponding Staple on the stapled document must be deleted separately.

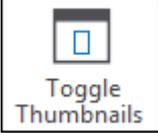
---

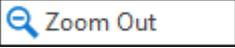
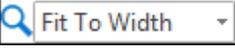
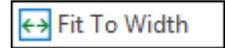
## Image Tab

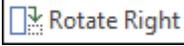
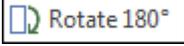
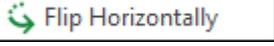


The **Image** tab allows you to view documents more efficiently and edit documents. You can use the buttons to resize and reorient the document.

Navigation	Description
	<p><b>Selection Zoom</b> allows you to zoom in on the selected region of the document. When this button is selected, click on the document and drag the mouse select a region. Release the mouse button to zoom in on the selected region.</p>
	<p><b>Hand Tool</b> allows you to pan, or scroll, the document in any direction. When this button is selected, click on the document and drag the mouse to move the document.</p> <hr/> <p><b>Note:</b> To pan quickly, hold down the <b>Alt</b> key while moving the mouse.</p> <hr/>
	<p><b>Previous Document</b> displays the previous document in the Document Search Results list.</p>
	<p><b>Next Document</b> displays the next document in the Document Search Results list.</p>
	<p><b>Previous Page</b> displays the preceding page of a multi-page document.</p> <hr/> <p><b>Note:</b> You can also press <b>Ctrl + Page Up</b> to display the preceding page of a multi-page document. If the document is being displayed in the <b>Document Viewer</b> pane, click the document prior pressing <b>Ctrl + Page Up</b>.</p> <hr/>
	<p><b>Next Page</b> displays the following page of a multi-page document.</p> <hr/> <p><b>Note:</b> You can also press <b>Ctrl + Page Down</b> to display the following page of a multi-page document. If the document is being displayed in the <b>Document Viewer</b> pane, click the document prior pressing <b>Ctrl + Page Down</b>.</p> <hr/>
	<p><b>First Page</b> displays the first page of the document.</p>
	<p><b>Last Page</b> displays the last page of the document.</p>
	<p><b>Go To Page</b> allows you to go to a specific page in the document. After clicking this button, type a page number and click <b>OK</b>.</p>

Navigation	Description
 <p>Toggle Thumbnails</p>	<p><b>Toggle Thumbnails</b> displays or hides thumbnails.</p>

Scale	Description
	<p><b>Zoom In</b> magnifies the view of a document, reducing the portion that is visible. Every zoom increases magnification by one third.</p>
	<p><b>Zoom Out</b> reduces the magnification of a document, increasing the portion that is visible. Every zoom reduces magnification by one third.</p>
	<p><b>Sizing</b> options allow you to select a standard sizing option. Select a specific percentage of reduction or magnification (25%, 50%, 75%, 100%, or 200%), Fit To Width, or Fit To Window. You can also type a custom scale. Also displays the current magnification percentage whenever the <b>Zoom In</b> or the <b>Zoom Out</b> options are used.</p> <hr/> <p><b>Note:</b> <b>Fit To Width</b> is selected by default.</p> <hr/>
	<p><b>Actual Size</b> displays the document in its actual size (as it is stored in OnBase).</p>
	<p><b>Fit To Width</b> resizes the document page so that its width is the same as the width of the document display area.</p>
	<p><b>Fit To Window</b> resizes the document page so that the entire image is displayed in the window.</p>

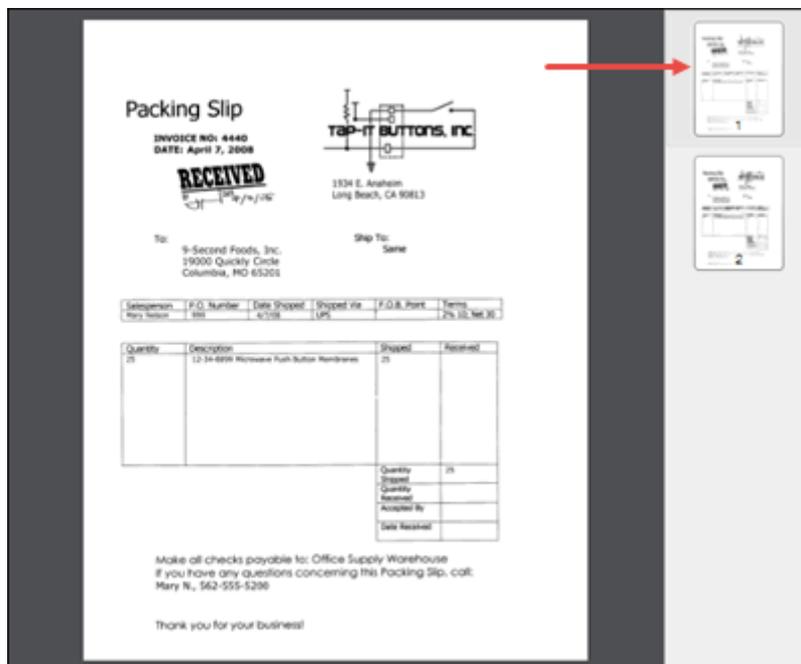
Transform	Description
 Rotate Left	<b>Rotate Left</b> rotates the selected pages 90 degrees counterclockwise. <b>Note:</b> To rotate all pages in a document at the same time, click <b>Ctrl + A</b> to highlight all pages before clicking <b>Rotate Left</b> .
 Rotate Right	<b>Rotate Right</b> rotates the selected pages 90 degrees clockwise. <b>Note:</b> To rotate all pages in a document at the same time, click <b>Ctrl + A</b> to highlight all pages before clicking <b>Rotate Right</b> .
 Rotate 180°	<b>Rotate 180</b> rotates the selected pages 180 degrees. <b>Note:</b> To rotate all pages in a document at the same time, click <b>Ctrl + A</b> to highlight all pages before clicking <b>Rotate 180</b> .
 Flip Horizontally	<b>Flip Horizontally</b> flips the selected pages horizontally around the vertical axis. <b>Note:</b> To flip all pages in a document at the same time, click <b>Ctrl + A</b> to highlight all pages before clicking <b>Flip Horizontally</b> .
 Flip Vertically	<b>Flip Vertically</b> flips the selected pages vertically around the horizontal axis. <b>Note:</b> To flip all pages in a document at the same time, click <b>Ctrl + A</b> to highlight all pages before clicking <b>Flip Vertically</b> .
 Save Flip & Rotation	<b>Save Flip &amp; Rotation</b> saves any flips or rotations. <b>Note:</b> When the <b>Auto-Save Flip and Rotation</b> user option is enabled, this button is not available.

Modify	Description
 Edit Pages	<b>Edit Pages</b> allows you to edit the current document using the <b>Document Separation</b> window. For more information, see <a href="#">Separating Image and PDF Documents on page 181</a> . This button is not available under the following conditions: <ul style="list-style-type: none"> <li>• This button is not available during indexing.</li> <li>• This button is not available if there are unsaved changes to the document.</li> </ul>

Modify	Description
	<b>Toggle Overlay</b> turns the overlay on and off, if an overlay is present.
	<b>Redaction Bitmaps</b> opens the <b>Redaction Bitmaps</b> tab. For more information, see <a href="#">Navigating in the Bitmap Redaction Tab on page 3</a> .

## Document Thumbnails

Document thumbnails are miniature representations of the document pages, which provide a method of document navigation. When you open a document, thumbnails are displayed along the right edge of the Document Viewer, in a vertical column:

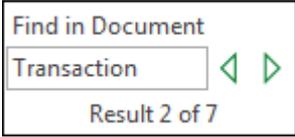


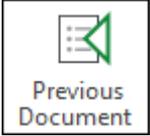
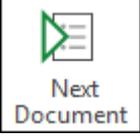
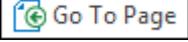
You can navigate to a different page in the open document by clicking on the thumbnail for that page.

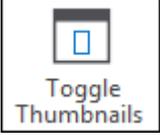
## Text Tab

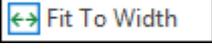
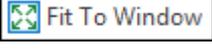


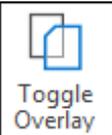
The **Text** tab allows you to view text documents more efficiently. You can use the buttons to resize and reorient the document. You can also search for text.

Search	Description
	<p><b>Find in Document</b> is used to search for text in text documents.</p> <p>For more information, see <a href="#">Internal Text Search on page 128</a>.</p>
	<p><b>Generate Report</b> is used to generate a report of text search results.</p> <p>For more information, see <a href="#">Internal Text Search on page 128</a>.</p>
	<p><b>Settings</b> is used to configure settings when searching for text in text documents.</p> <p>For more information, see <a href="#">Internal Text Search on page 128</a>.</p>

Navigation	Description
 <p>Selection Zoom</p>	<p><b>Selection Zoom</b> allows you to zoom in on the selected region of the document. When this button is selected, click on the document and drag the mouse select a region. Release the mouse button to zoom in on the selected region.</p>
 <p>Hand Tool</p>	<p><b>Hand Tool</b> allows you to pan, or scroll, the document in any direction. When this button is selected, click on the document and drag the mouse to move the document.</p> <hr/> <p><b>Note:</b> To pan quickly, hold down the <b>Alt</b> key while moving the mouse.</p> <hr/>
 <p>Previous Document</p>	<p><b>Previous Document</b> displays the previous document in the Document Search Results list.</p>
 <p>Next Document</p>	<p><b>Next Document</b> displays the next document in the Document Search Results list.</p>
 <p>Previous Page</p>	<p><b>Previous Page</b> displays the preceding page of a multi-page document.</p> <hr/> <p><b>Note:</b> You can also press <b>Ctrl + Page Up</b> to display the preceding page of a multi-page document. If the document is being displayed in the <b>Document Viewer</b> pane, click the document prior pressing <b>Ctrl + Page Up</b>.</p> <hr/>
 <p>Next Page</p>	<p><b>Next Page</b> displays the following page of a multi-page document.</p> <hr/> <p><b>Note:</b> You can also press <b>Ctrl + Page Down</b> to display the following page of a multi-page document. If the document is being displayed in the <b>Document Viewer</b> pane, click the document prior pressing <b>Ctrl + Page Down</b>.</p> <hr/>
 <p>First Page</p>	<p><b>First Page</b> displays the first page of the document.</p>
 <p>Last Page</p>	<p><b>Last Page</b> displays the last page of the document.</p>
 <p>Go To Page</p>	<p><b>Go To Page</b> allows you to go to a specific page in the document. After clicking this button, type a page number and click <b>OK</b>.</p>

Navigation	Description
 <p>Toggle Thumbnails</p>	<b>Toggle Thumbnails</b> displays or hides thumbnails.

Scale	Description
 <p>Zoom In</p>	<b>Zoom In</b> magnifies the view of a document, reducing the portion that is visible. Every zoom increases magnification by one third.
 <p>Zoom Out</p>	<b>Zoom Out</b> reduces the magnification of a document, increasing the portion that is visible. Every zoom reduces magnification by one third.
 <p>Fit To Width</p>	<b>Sizing</b> options allow you to select a standard sizing option. Select a specific percentage of reduction or magnification (25%, 50%, 75%, 100%, or 200%), Fit To Width, or Fit To Window. You can also type a custom scale. Also displays the current magnification percentage whenever the <b>Zoom In</b> or the <b>Zoom Out</b> options are used.
<hr/> <p><b>Note:</b> <b>Fit To Width</b> is selected by default.</p> <hr/>	
 <p>Actual Size</p>	<b>Actual Size</b> displays the document in its actual size (as it is stored in OnBase).
 <p>Fit To Width</p>	<b>Fit To Width</b> resizes the document page so that its width is the same as the width of the document display area.
 <p>Fit To Window</p>	<b>Fit To Window</b> resizes the document page so that the entire image is displayed in the window.

Transforms	Description
 <p>Toggle Overlay</p>	<b>Toggle Overlay</b> turns the overlay on and off, if an overlay is present.

## Internal Text Search



Use the **Find in Document** field on the **Text** tab to search for specific text strings within the document.

---

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

---

To perform an internal text search:

1. Click in the **Find in Document** field and type the characters to search for. Internal text searches are case-insensitive, so searches for **Account** will also find **account**, and searches for **account** will also find **Account**.
2. If necessary, click **Settings** to limit your internal text search.  
See [Limiting Searches Using Internal Text Search Settings on page 129](#) for more information.
3. Press the **Enter** key.
4. The number of occurrences of the specified string of text is displayed below the **Find in Document** field as **Result 1 of #**, where # is the total number of occurrences.
5. The first occurrence of the specified string of text is displayed within a highlight bar.
6. Click **Find Next** to search for the next following occurrence of the specified string within the current text document.



7. Click **Find Previous** to search for the previous occurrence of the specified string within the current text document.

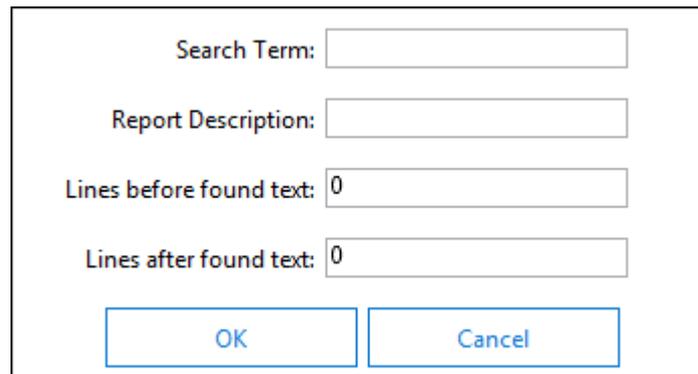


## Generating Text Search Reports

Internal text searches can be run to generate a report of text search results. Text search reports that are generated are archived to OnBase as a document in the **SYS Search Reports** Document Type. The full line in which the text result is found is included in the generated report.

To generate a text search report:

1. Click **Generate Report**. The **Generate Text Report** dialog box is displayed:



The dialog box is titled "Generate Text Report" and contains the following fields and buttons:

- Search Term:** An empty text input field.
- Report Description:** An empty text input field.
- Lines before found text:** A numeric input field with the value "0".
- Lines after found text:** A numeric input field with the value "0".
- OK** and **Cancel** buttons at the bottom.

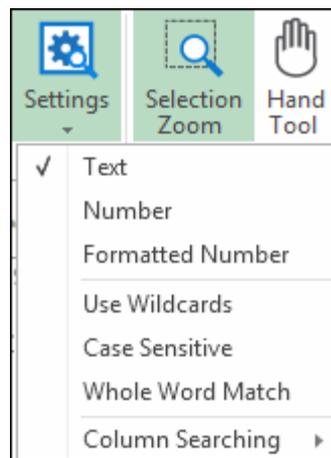
2. In the **Search Term** field, enter the characters for which to search. This field is limited to 200 characters.
3. In the **Report Description** field, enter a description for the text search report. The specified value is used to populate the **Description** Keyword Value for the generated report document. This field is limited to 49 characters.
4. Enter a value from **0** to **100** to specify the number of lines prior to each text search result in the document that will be included in the generated report document.
5. Enter a value from **0** to **100** to specify the number of lines following each text search result in the document that will be included in the generated report document.
6. Click **OK**. The text search is run.
7. Once the text search is complete, the generated search report is archived and displayed.

## Limiting Searches Using Internal Text Search Settings

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 that the phrase you are 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 limit a search using internal text search settings:

1. Click **Settings**.
2. The **Settings** drop-down list is displayed:



3. Select from the following:

Settings	Description
<b>Text</b>	Select to search for alphanumeric text.
<b>Number</b>	Select to search for numeric values. This option also allows the use of the following operators to limit the search: =, >, <, >=, and =<. You can use <b>and</b> , <b>or</b> , and <b>to</b> as operators to search for a range of values. For example, type <b>2010 and 2011</b> to find documents containing both 2010 and 2011. 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 <b>001</b> and the actual text is <b>ABC001</b> , then the value will not be found.
<b>Formatted Number</b>	Select to search for numeric values that use formatting characters. For example, to search for all Social Security Numbers greater than 800-00-0000, type <b>&gt; 800-00-0000</b> in the <b>Search String</b> field. You can use this option with following operators to limit your search: =, >, <, >=, and =<. The <b>and</b> , <b>or</b> , and <b>to</b> operators can be used to search for a range of values. For example, type <b>800-00-000 to 900-00-0000</b> to find documents containing values within this range. <hr/> <b>Note:</b> 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. <hr/>
<b>Use Wildcards</b>	Select to include wild card characters in your text string search criteria.
<b>Case Sensitive</b>	Select to return only matches that have the same capitalization as the text string search criteria.

Settings	Description
<b>Whole Word Match</b>	Select to return matches for an exact word.
<b>Column Searching</b>	<p><b>Use Column Searching</b> - Select to search within specified columns.</p> <p><b>Column Indexing</b> - Select the column index for the block of text that you want to search. This setting is only available for documents with column indexes.</p> <p>After selecting either option, select <b>Columns...</b> to specify columns in the <b>Column Configuration</b> window:</p> <div data-bbox="699 533 1235 984" style="border: 1px solid green; padding: 10px; margin: 10px auto; width: fit-content;"> <p style="text-align: center;">Column Configuration</p> <p>From</p> <div style="border: 1px solid gray; padding: 2px; display: inline-block; margin-bottom: 5px;">1</div> <p>To</p> <div style="border: 1px solid gray; padding: 2px; display: inline-block; margin-bottom: 5px;">1</div> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <span style="border: 1px solid gray; padding: 5px 15px;">Yes</span> <span style="border: 1px solid gray; padding: 5px 15px;">No</span> </div> </div> <p>In the <b>From</b> field, type or select 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 <b>1</b>, the next column to the right is <b>2</b>, and so on.</p> <p>In the <b>To</b> field, type or select the character position of the column to end the search in (the right most column to be searched). The number in the <b>To</b> field must be greater than or equal to the number in the <b>From</b> field.</p>

4. Press the **Enter** key.
5. The search is executed with your selected options.

## Overlays

This example shows a document displayed with an overlay.

**PURCHASE ORDER**

**9second FOODS**  
 19000 Quickly Circle  
 Columbia, MO 66201  
 p. 573.555.9000  
 f. 573.555.9001

The following number must appear on all related correspondence, shipping papers, and invoices:  
 P.O. NUMBER **999**

To: **Tap-It Buttons, Inc**  
 1934 E. Anaheim  
 Long Beach, CA 90813  
 Vendor ID: 154

Ship To: **9-Second Foods, Inc.**  
 19000 Quickly Circle  
 Columbia, MO 65201  
 573.555.9000

P.O. DATE	REQUISITIONER	SHIP VIA	F.O.B. POINT	TERMS
04/07/08	Mary Nelson	UPS	4440	25 10;NET 30

This example shows the same document displayed without an overlay.

999

Tap-It Buttons, Inc  
 1934 E. Anaheim  
 Long Beach, CA 90813  
 Vendor ID: 154

9-Second Foods, Inc.  
 19000 Quickly Circle  
 Columbia, MO 65201  
 573.555.9000

04/07/08      Mary Nelson      UPS      4440      25 10;NET 30

25      12-34-0899 Microwave Push Button Membranes      11.75      293.75

293.75

If a text document has been set up with a corresponding overlay, the **Toggle Overlay** button is available. 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 **Toggle Overlay** on the **Text** tab to apply its overlay:

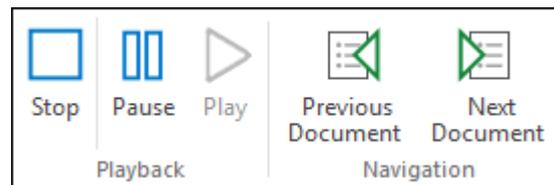


## Remove an Overlay from a Document

To remove the overlay from the window, click **Toggle Overlay** on the **Text** tab.

## Media Tab

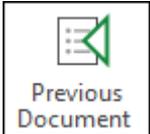
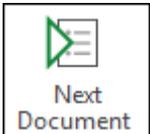
The **Media** tab is displayed after opening an audio or video file in OnBase:



You can use the slider to re-wind or fast-forward.

You can also use the following **Controls**:

Playback	Description
	Click to stop the file that is playing.
	Click to pause the file that is playing.
	Click to play the file.

Navigation	Description
 Previous Document	<b>Previous Document</b> displays the previous document in the Document Search Results list.
 Next Document	<b>Next Document</b> displays the next document in the Document Search Results list.

## 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 or the Document Search Results list.

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.

The **Cross-References** pane displays cross-references for the selected document if there are any available:

**Document Information Panel** ✕

**Document Type**  
HR - Offer Letter

**Document**  
Offer Letter for JASON KNIGHT (422-35-9987)

Icon	Name	Type	Date
	Employment Application for JASON KNIGHT (422-35-9987)	HR - Application For Employment (E-Form)	2/12/2017
	Interview Guide for JASON KNIGHT (422-35-9987)	HR - Interview Guide (E-Form)	2/12/2017
	Cover Letter for JASON KNIGHT (422-35-9987)	HR - Cover Letter	2/12/2017
	Resume for JASON KNIGHT (422-35-9987)	HR - Resume	2/12/2017

<  >

Additional image or text-based cross references may exist on the document.





Double-click the cross-reference to display the document. The document displays in a window titled **Document Related to [Auto-Name string of the original document]**.

---

**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, all documents matching cross-reference criteria are retrieved.

---

## From a Document Search Results List

Select a document and click **Cross-References** on the **Document** tab.

## From Image or Text-Based Documents

From an open document:

- Double-click on the cross-reference or region preset by your system administrator; or
- Click **Cross-References** on the **Document** tab.

## From E-Forms, HTML Documents, or OLE Documents

From an E-Form, HTML document, or OLE document, click **Cross-References** on the **Document** tab.

## Access Document History

View a document's history by accessing the **Document History** dialog box, which contains a variety of information regarding the history of the document.

To view a document's history:

- From a Document Search Results list, select the document, right-click, and select **History** or click **History** on the **Document** tab.
- From an open text, image, or PDF document, right-click and select **History** or click **History** on the **Document** tab.
- From an open HTML document, click **History** on the **Document** tab.

---

**Note:** Your User Group must have the Document History product right in order to access **Document History**. For additional information, see your system administrator.

---

## Document History

The **Document History** dialog box contains the following information about actions that were performed on the document:

Column	Description
<b>Log Date</b>	The date that the action was logged.
<b>Log Time</b>	The time that the action was logged.
<b>User name</b>	The user who performed the action.
<b>Action</b>	The action that was performed.
<b>Message</b>	A message, using the document's Auto-Name string, describing the action that was performed.

---

**Note:** Depending on your system's configuration, you may have access to the **Workflow Queues** or **Workflow Transactions** tabs. For more information on these tabs, see the Workflow documentation.

---

**Note:** Page rotation is calculated clockwise from the point of origin. For example, **Rotate270** is displayed in the Document History dialog if a page is rotated once to the left. Rotating the page once to the right would be shown in the Document History as **Rotate90**.

---

## Access Document Properties

The **Document Properties** dialog box 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, image, or PDF document, right-click and select **Properties** or click **Properties** on the **Document** tab.
- From an open HTML document, click **Properties** on the **Document** tab.

---

**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.

Property	Description
<b>Document Handle</b>	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.
<b>Document Name</b>	The Auto-Name string of the document. This is displayed at the top of the <b>Document Properties</b> dialog box.
<b>Batch #</b>	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.
<b>Document Date</b>	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.  <b>Note:</b> If the <b>Import</b> layout has been open overnight, the system date and Document Date may reflect the previous day's date. If this has occurred, close and re-open the <b>Import</b> layout so that the correct Document Date is stored.
<b>Date Stored</b>	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.
<b>Document Type Number</b>	The internal number associated with documents of this Document Type.
<b>Document Type</b>	The name of the Document Type to which the document belongs.
<b>Document Status</b>	Displays the document's position in the system. If the document is retrievable, a status of <b>0</b> is displayed. If the document is in the system, but not yet available for retrieval, a status of <b>1</b> is displayed. If the document has been deleted, a status of <b>16</b> is displayed.

Property	Description
<b>Document Type Revision</b>	Displays which revision of the Document Type the document is using. Different Document Type revisions can have different configurations.
<b>Revision #</b>	If the document is revisable, the <b>Revision</b> field displays the latest revision number of the document. For non-revisable documents, this field is always set to 1.
<b>Created By</b>	The name of the user who processed the document into the system.
<b>Security Value</b>	For internal use only.
<b>Page</b>	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 <b>&lt;Virtual E-Form&gt;</b> instead of a page number. This information is available by clicking <b>More Information</b> .
<b>Disk Group</b>	The number associated with the Disk Group in which the document is stored. This information is available by clicking <b>More Information</b> .
<b>Volume</b>	The volume number in the Disk Group in which the file is stored. This information is available by clicking <b>More Information</b> .
<b># of Pages and # of Lines</b>	The characteristics of the document within the file. These values are useful for text documents. Non-text documents display the number of pages as <b>1</b> and the number of lines as <b>0</b> . This information is available by clicking <b>More Information</b> .
<b>File Format</b>	The number associated with a configured file format. This number determines how a document is displayed and printed. This information is available by clicking <b>More Information</b> .
<b>Offset and Size</b>	Describes the physical storage of the document within the file. The <b>Item Offset</b> is the byte offset into the file for the starting point of this particular document. The <b>Item Size</b> is the number of bytes in the file that make up this document. This information is available by clicking <b>More Information</b> .
<b>Path</b>	Lists a partial path to the document. The beginning of the path depends on the location configured for the document's Disk Group. This information is available by clicking <b>More Information</b> .

---

**Note:** Dates and times use the Windows regional settings for formatting.

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## Generating a CSV File

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**Note:** When generating a CSV file with one or more documents containing a Multi-Instance Keyword Type Group, keywords from the Multi-Instance Keyword Group will not be included.

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**Note:** To generate a CSV file, a user must have the **View Keywords** and **Create List Report** privileges.

---

---

**Note:** CSV files cannot be generated from Full Text Search result lists.

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---

**Note:** In the generated CSV file, ' is inserted at the beginning of values that begin with =, -, @, or +.

---

To export the results of a search in a .csv file, follow these steps:

1. From a **Document Search Results** list right-click and select **Generate CSV File**. The **Generate CSV File** window is displayed.

The screenshot shows a dialog box titled "Generate CSV File" with a close button (X) in the top right corner. The dialog is organized into several sections:

- Range:** Two radio buttons are present: "All" (unselected) and "Selected Items" (selected).
- Columns:** A list of checkboxes for selecting columns: "Document Name" (checked), "Document Date" (unchecked), "Archive Date" (unchecked), "Document Type" (unchecked), "Document Handle" (unchecked), and "DocPop URL" (unchecked).
- Keywords:** Three radio buttons are present: "All" (selected), "Common" (unchecked), and "None" (unchecked).
- Save to File:** A text input field with a folder icon to its right.
- Launch Associated Application:** A checked checkbox.

At the bottom of the dialog are two buttons: "Generate" and "Cancel".

2. Configure your file as desired. The following table describes each available option.

Option	Description
<b>Selected Items</b>	Select this radio button to generate the CSV file using only the documents you have selected in the search results list.
<b>All</b>	Select this radio button to generate the CSV file using all of the documents in the search results list.
<b>Document Name</b>	Select this box to include the Document Name in the CSV file.
<b>Document Date</b>	Select this box to include the Document Date in the CSV file.
<b>Archive Date</b>	Select this box to include the date the document was stored in OnBase in the CSV file.
<b>Document Type</b>	Select this box to include the Document Type in the CSV file.
<b>Document Handle</b>	Select this box to include the Document Handle in the CSV file.
<b>DocPop URL</b>	Select this box to include the DocPop URL in the CSV file. <hr/> <b>Note:</b> Depending on your system's configuration, you may be unable to select this option. See your system administrator if you have questions. <hr/>
<b>Keywords</b>	Select the Keyword Types you want to include in the CSV file. <b>None:</b> Select this option to include no Keyword Types. <b>Common:</b> Select this option to include only Keyword Types that are found in all of the documents included in the CSV file. <b>All:</b> Select this option to include all Keyword Types in all the document included in the CSV file. <hr/> <b>Note:</b> Depending on your system's configuration, you may be unable to view certain Keyword Types. These Keyword Types will not be included in the CSV file. <hr/>

3. In the **Save to File** field, enter the name and location that will be used to save the CSV file. You can select **Browse** to navigate to the correct location.
4. Click **Launch Associated Application** if you would like to view the CSV file after you click **Generate**. The file will be opened by your default CSV application.

- Click **Generate**. The CSV file has been created at the specified location.  
Or click **Cancel** to cancel the process and return to the search results list.

---

**Note:** The **Generate** button is not available until a file location is specified.

---



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**Caution:** If the CSV file already exists and is currently open, you will be unable to generate the new CSV file. You must close the existing CSV file before you can overwrite it with your newly generated file.

---

## Saving Documents to Files

If you have the appropriate user rights, you can save the document that you are viewing to a file that you can access on your computer system or through a network connection.

The ways in which you can save a document to a file are based on whether the document is open, as well as file type of the document:

- From a Document Search Results list, or an open text or image document:
  - Right-click and select **Send To | File**, or
  - Click the **Send To** button on the **Document** tab and select **File**.

---

**Tip:** You can select multiple documents to save by holding down the **Ctrl** key while clicking.

---

- From an open E-Form, HTML document, or OLE document, click the **Send To** button on the **Document** tab and select **File**.

---

**Note:** Rotating an image without saving the rotation before sending it to file will not save the newest rotation.

---

Certain special characters are not supported in file names. If these characters appear in the document's Auto-Name string, they are replaced with a space or substituted with other characters that are supported. The following special characters are replaced with a space: @ # \$ % ^ & = { } [ ] : " ; ' < >. Character substitutions are as follows:

Auto-Name Character	Substitution
*	+
?	!
/	-
\	-
	!

To save a document to a file:

1. Right-click and select **Send To | File**, or click the **Send To** button on the **Document** tab and select **File**.
2. The **Send To File** pane is displayed:

**Send To File**



Save

**Document 1 of 1:**  
Packing Slip for PO 888 from  
PHONE SHACK

**File Format of Attachment** ⓘ

 Default/TIFF Format  
Send file using the default file format ▼

**Settings**

 Send All Pages  
Send the entire document ▼

Pages: ⓘ

 Note Options  
None ▼

**File Name:**  
 

**Directory:**  
 

Apply Settings to Subsequent Documents

3. Select one of the following options from the **File Format of Attachment** drop-down select list:

File Format of Attachment	Description
<b>Default/TIFF Format</b>	<p>Saves the document as a TIFF file.</p> <p>Available for documents with any of the following file formats:</p> <ul style="list-style-type: none"> <li>• Image file format</li> <li>• PCL</li> <li>• PCL with overlay</li> <li>• Text report format</li> <li>• Text report format with overlay</li> </ul>
<b>Unencrypted PDF</b>	<p>Saves the document as a PDF file.</p> <p>Available for documents with any of the following file formats:</p> <ul style="list-style-type: none"> <li>• Image file format</li> <li>• PCL</li> <li>• PCL with overlay</li> <li>• Text report format</li> <li>• Text report format with overlay</li> </ul>
<b>Encrypted PDF</b>	<p>Saves the document as an encrypted PDF file. Upon choosing this Content Type, you will be prompted to enter a password, which will need to be entered upon opening the file.</p> <p>Available for documents with any of the following file formats:</p> <ul style="list-style-type: none"> <li>• Image file format</li> <li>• PCL</li> <li>• PCL with overlay</li> <li>• Text report format</li> <li>• Text report format with overlay</li> </ul>
<b>Native Format</b>	<p>Saves the document in the format in which it is stored in OnBase (e.g., OLE documents such as Word documents and PDFs, uncompressed text documents, most image documents).</p> <p>Overlays are not applied.</p> <hr/> <p><b>Note:</b> When saving a Unity Form using <b>Native Format</b>, attachment controls, images, drawing controls, and signature controls are not supported and do not function in this context. Choosing <b>Default/TIFF Format</b> will display these controls.</p> <hr/> <p><b>Note:</b> This option is unavailable for multi-page image documents.</p> <hr/>

File Format of Attachment	Description
Text Format	Saves the document as a .txt file. Available for documents with compressed text file formats. This includes documents imported with COLD or documents with the .ctx file type.

**Note:** An **Image Rendered PDF** document can be saved in its native format as long as no modifications have been made to the document. Once the document has been modified (e.g., an image markup has been applied, or pages have been moved or deleted), the document can no longer be saved in its native format.

If you are saving an encrypted PDF, you are required to type an encryption password in the **Password** field, which is displayed below the **File Format of Attachment** field in the **Send to File** pane. This password is case-sensitive and can include alphanumeric or special characters. It cannot contain Unicode characters.

**Caution:** If you lose or forget the encryption password, it cannot be recovered.

- Select one of the following from the **Settings** drop-down select list:

Settings	Description
Send All Pages	All pages in the selected document will be saved.
Send Custom Range	The page(s) specified in the <b>Pages</b> field will be saved. Enter page numbers and/or page ranges, separated by commas. For example: 1,3,5-12.  <b>Note:</b> This option is unavailable when <b>File Format of Attachment</b> is set to <b>Native Format</b> .

- If you are saving a document containing notes or annotations, the **Note Options** drop-down list is available. Select either of the following:

Option	Description
Annotation and/or Note Icon On Document	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.

Option	Description
<b>Note Text On Document</b>	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 <b>Annotation and/or Note Icon On Document</b> , 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.

6. To change the file name the document is saved as, click the **Browse** button:



Enter a new name for the file and click **Save**.

7. To change the location where the document should be saved, click the **Browse** button:

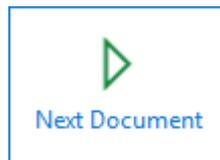


The Browse For Folder dialog box is displayed. Browse to a new location and click **OK**, or click **Make New Folder** to create a new folder in the current directory.

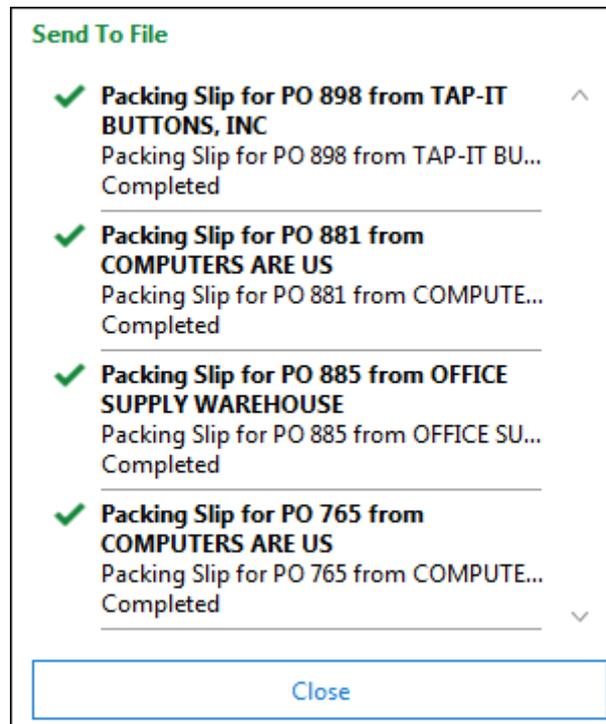
8. When sending multiple image or text documents, the **Apply Settings to Subsequent Documents** check box is available.

When it is selected, the **File Format of Attachment** selection is applied to all subsequent documents. The **Settings** drop-down list and **Pages** field are not available. The **Note Options** drop-down list is only available if the first selected document contains notes.

When it is not selected, you are required to repeats steps 3 through 5 for each document. Navigate through the documents using the **Next Document** button:



- Click **Save**. A confirmation is displayed in the Send To File pane:



- The document is saved to the selected location using the chosen document name as the file name.

## Deleting Documents

You can delete documents from the **Document** tab, or by using the right-click option from a Document Search Results list, open image or text document, or folder.

To delete a document from the **Document** tab:

- Ensure that the document is displayed.
- Select the **Document** tab.
- Click **Delete**.
- Confirm the deletion when prompted.

To delete a document from a Document Search Results list, or to delete an open image or text document:

- Select the document(s) you want to delete.
- Right-click and select **Delete Document**.
- Confirm the deletion when prompted.

To delete a document from a folder:

1. Select the document(s) you want to delete from the Folder **Documents** pane.
2. Right-click and select **Delete Document**.
3. Confirm the deletion when prompted.

## Creating a Document

In most cases, new documents are created by importing them. In addition to importing documents, you can create new documents from an existing document or from a thumbnail. The newly created document will be of the same file type as the original document.

The new document created can become a revision of an existing selected document or an entirely new document.

---

**Note:** A revisable document will not have its initial revision created until it has been indexed. Prior to indexing, all changes to the document will not create a new revision.

---

---

**Note:** A revision of a document can not be created while the document is locked.

---

## Creating a New Document from an Existing Document

---

**Note:** An image document that has unsaved modifications cannot be used to create a new document with the **Send To | Create New Document** feature. Save all modifications before attempting to create a new document from an image.

---

1. To create a new image document from an existing one:
  - From the **Documents Search Results** list, right-click on a document and select **Send To | Create New Document**.

---

**Note:** The **Create New Document** and **Copy to Clipboard / Save As** privileges are needed to use the **Send To | Create New Document Feature** in the Document Retrieval layout.

---

- From an open document, right-click and select **Send To | Create New Document**.

- From an open document, select a document's thumbnail page image, or select multiple pages by holding down the **Ctrl** (specific pages) or **Shift** (page range) keys. You can also press **Ctrl + A** to select all pages. After selecting pages, right-click and select **Send To | Create New Document**.

The **Create New Document** dialog box is displayed.

---

**Note:** Unity Forms and Image Forms are not supported by the **Send To | Create New Document** feature.

---

**Create New Document**

Document Type Group  
<All>

Document Type  
HR - Offer Letter

Create from pages ?  
1-1

Create as revision of original document

Initiate Workflow

Document Date  
03/02/2007

Keywords

Name  
JOHN MALLORY

Position Applied  
SALES REPRESENTATIVE

SSN

Base Salary

OK Cancel

- Select the **Document Type Group** for the new document.

3. Select the **Document Type** for the new document.

---

**Note:** If you select a different Document Type during document creation, entered Keyword Values are cleared. Default values for common Keyword Types are either updated or cleared when selecting a different Document Type, depending on whether the selected Document Type has default values for those Keyword Types.

---

4. In the **Create from pages** field, specify the page(s) to include in the new document. If you selected specific thumbnail page images, the **Create from pages** field automatically reflects this selection.
  - To specify a range of pages, type the start page-end page (e.g., pages **4-6**).
  - To specify multiple pages that are not within a range, use commas to separate the pages (e.g, pages **1, 3, 5-12**).

---

**Note:** If the original document is a text document or a single page, this field will not be displayed.

---

5. To delete the selected pages from your original document, select **Delete copied pages from original document**.

---

**Note:** The option **Delete copied pages** can not be selected when the **Create from pages** range includes all pages of the original document.

---

6. If you want the new document to be created as a revision of the existing document, select **Create as revision of original document**.

---

**Note:** If you selected **Delete copied pages from original document** in the previous step, the **Create as revision of original document** option will not be available.

---

7. To add the new document to Workflow, select **Initiate Workflow**.

---

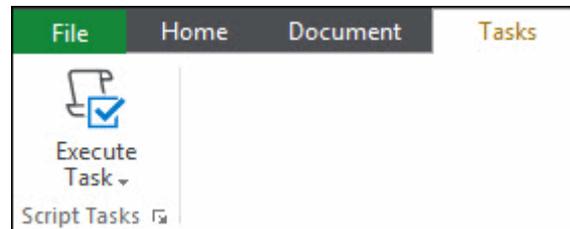
**Note:** This check box is only available when licensed for Workflow and the Document Type is part of an existing Life Cycle.

---

8. To assign a date to the new document, select a date from the **Document Date** drop-down calendar. Often, this is the date the document was created or received.
9. Keyword Values are inherited from the original document. If necessary, click **Clear Keywords** and re-index the new document if necessary.
10. Click **OK** to create the new document. The new document is automatically displayed.

## Executing a Unity Script

When the **Tasks** tab is available, you can execute a Unity Script over any open document or a group of documents selected from the document retrieval list:



Clicking **Execute Task** displays a drop-down list of scripts to execute on the document(s).

---

**Caution:** Executing a Unity Script which affects an open document will refresh the document viewer and keyword panel for that document and remove any unsaved changes. Ensure that you have saved any necessary changes before executing a Unity Script.

---

---

**Note:** The Unity Automation API license is required to execute Unity Scripts.

---

To change the order of script tasks in the **Execute Task** drop-down list, click the lower right corner of the **Script Tasks** ribbon group, or select **Configure Items...** from this drop-down list. In the **Organize Tasks** dialog box, select script tasks and re-position them using the corresponding arrows. To add a button to the **Script Tasks** ribbon group for a script task, select the corresponding check box next to the script task:





## Working with Keywords

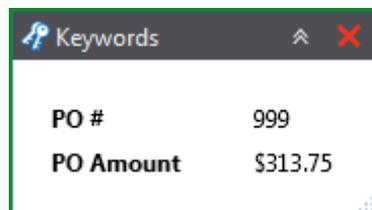
---

**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, Import, and Add/Modify Keywords.

---

### Access the Keyword Values of a Document

Some documents have one or more Keyword Values displayed automatically in the **Keywords** window when you open the document:



You can move the **Keywords** window, or minimize it by clicking:



You can also close the **Keywords** window by clicking:



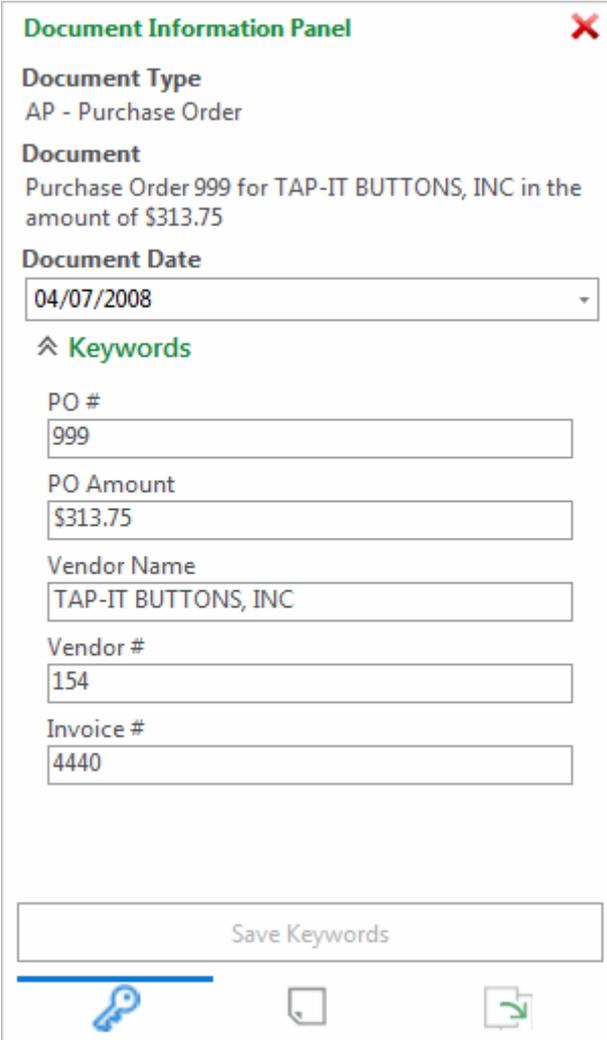
To copy a Keyword Type or Keyword Value to the Windows clipboard, select it and press **Ctrl + C**, or right-click and choose **Copy**.

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, perform one of the following:

- From a Document Search Results list or an open image or text document, right-click and select **Keywords**, or click **Keywords** on the **Document** tab.
- From an open OLE or HTML document, click **Keywords** on the **Document** tab.

The Keywords pane is displayed:



**Document Information Panel** ✕

**Document Type**  
AP - Purchase Order

**Document**  
Purchase Order 999 for TAP-IT BUTTONS, INC in the amount of \$313.75

**Document Date**  
04/07/2008

⤴ **Keywords**

PO #  
999

PO Amount  
\$313.75

Vendor Name  
TAP-IT BUTTONS, INC

Vendor #  
154

Invoice #  
4440

Save Keywords

From the **Add/Modify Keywords** pane, you can view or edit a document's **Document Date** or Keyword Values, depending on your rights and the Document Type. Some Document Types are configured to not allow keyword editing, which renders a document's Keyword Values read-only.

---

**Note:** When the Keywords pane is displayed, other users cannot edit that document's Keyword Values. The document is locked until the Keywords pane is closed.

---

---

**Tip:** For Keyword Values that exceed the width of the Keywords pane, hover over the Keyword Value to display its entire value.

---

## Add / Modify Keywords

Use the Keywords pane to view or modify the document Keyword Values currently associated with the document. The Keyword Value is blank if no Keyword Value is currently assigned.

You can use the Keywords pane 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. 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 Keyword Value from the drop-down list.

When you modify a Keyword Value, the modified Keyword Value turns blue:

**Document Information Panel** ✖

**Document Type**  
AP - Purchase Order

**Document**  
Purchase Order 999 for TAP-IT BUTTONS, INC in the amount of \$313.75

**Document Date**  
04/07/2008

⤴ **Keywords**

PO #  
999

PO Amount  
\$313.75

**Vendor Name**  
TAP-IT BUTTONS, INC.

Vendor #  
154

Invoice #  
4440

Save Keywords

You can use the **Tab** key to move to the next Keyword Value field.

When viewing keywords, the following keyboard shortcuts are available:

Keyboard Shortcut	Description
<b>F5</b>	Show the drop-down select list for the selected Keyword Type.
<b>F6</b>	Add another value for a Keyword Type.
<b>Ctrl + O</b>	Collapse or expand any Multi-Instance Keyword Type Groups.

Click **Save Keywords** to save any additions or modifications in the Keywords pane. The Keywords pane is refreshed to display the most recent changes.

---

**Caution:** In some instances, changing Keyword Values will affect the appearance of your document. Change Keyword Values carefully.

---

---

**Note:** If this document is checked out by another user, keywords cannot be modified.

---

---

**Note:** A document cannot be saved with an invalid Document Date. The Document Date field will turn red to indicate an invalid date entry.

---

---

**Note:** You cannot change Keyword Values on E-Forms that have been signed. When a form is signed, the Keywords pane becomes read-only and the **Re-Index** option is disabled for the form.

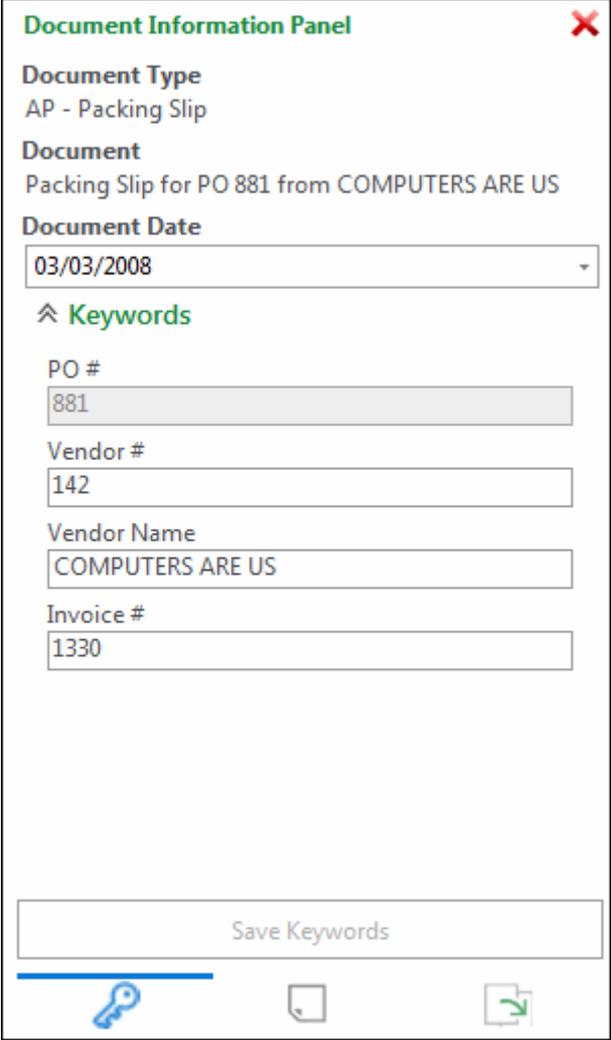
---

## 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:

- Keywords can be configured to appear as read-only to certain User Groups. If this is the case, the Keywords pane will resemble the following:

In the following example, the **PO #** Keyword Value 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.

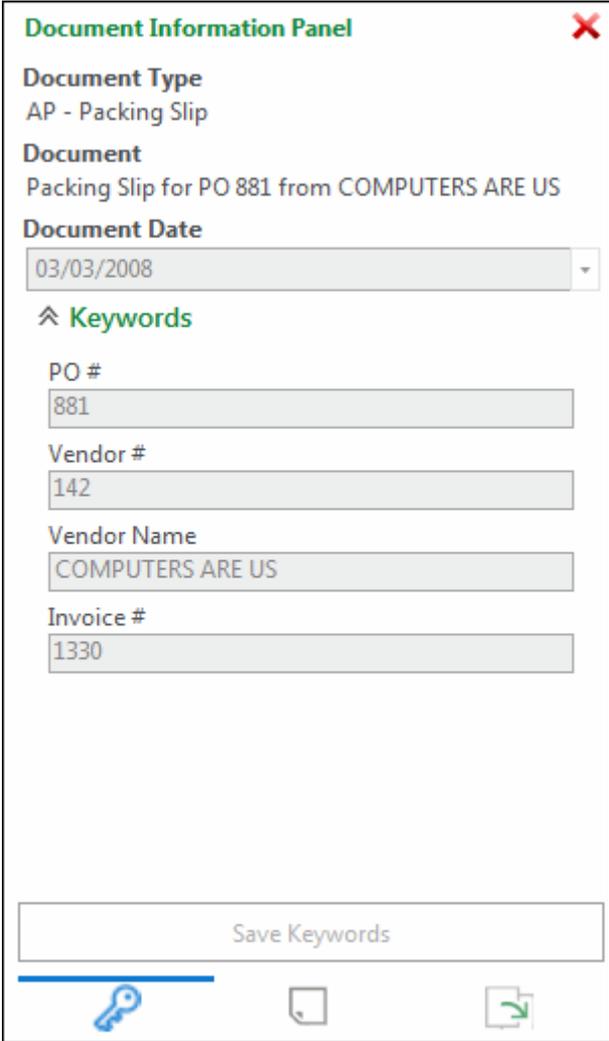


The screenshot shows a 'Document Information Panel' window with a red close button in the top right corner. The panel contains the following information:

- Document Type:** AP - Packing Slip
- Document:** Packing Slip for PO 881 from COMPUTERS ARE US
- Document Date:** 03/03/2008 (displayed in a dropdown menu)
- Keywords:** A section header with an upward-pointing arrow icon.
- PO #:** 881 (displayed in a greyed-out text field, indicating it is read-only)
- Vendor #:** 142 (displayed in a standard text field)
- Vendor Name:** COMPUTERS ARE US (displayed in a standard text field)
- Invoice #:** 1330 (displayed in a standard text field)

At the bottom of the panel, there is a 'Save Keywords' button and three icons: a key icon, a document icon, and a document with an arrow icon.

- The User Group that you belong to does not have the **Modify Keywords** privilege. The Keywords pane displays in read-only mode:



The screenshot shows a window titled "Document Information Panel" with a close button (X) in the top right corner. The panel contains the following information:

- Document Type:** AP - Packing Slip
- Document:** Packing Slip for PO 881 from COMPUTERS ARE US
- Document Date:** 03/03/2008 (displayed in a dropdown menu)
- Keywords:** A section with an upward-pointing arrow icon and the text "Keywords". Below it are five text input fields:
  - PO #:** 881
  - Vendor #:** 142
  - Vendor Name:** COMPUTERS ARE US
  - Invoice #:** 1330
- Save Keywords:** A button at the bottom of the Keywords section.

At the bottom of the panel, there is a blue horizontal bar with three icons: a key, a document, and a document with a right-pointing arrow.

- When you elect to view keywords on a document, OnBase displays a message that someone has the document checked out or locked, and the Keywords pane is in read-only mode. Depending on your system configuration, this happens if a document is checked out by another user, or if it is persistently checked out.

---

**Note:** When you open the **Add/Modify Keywords** pane, the document is locked for your use so you can modify Keyword Values and save the changes. The document is unlocked when the pane is closed. When another user attempts to open the Keywords pane for a document that is locked, the user can view the Keyword Values, but not modify them.

---

## 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.

The mask format is displayed after placing your cursor in the Keyword Type field, as shown in the following example:



## 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** layout, enter the first Keyword Value. Press the **Tab** key on the keyboard or click outside of the Primary Keyword Type field. 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, you are prompted to select which AutoFill Keyword Set to use. Continue to Step 2. Otherwise, skip to Step 6.
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**.

---

**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. 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. From an open document or from a Document Search Results list, right-click and select **Re-Index** or click **Re-Index** on the **Document** tab.
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 177.

---

- To select a date with a calendar, hover over the right edge of the **Document Date** field and click the down arrow.
- 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.
- Add Keyword Values to any Keyword Types that are not associated with the previous Document Type but are associated with the new Document Type.
- 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.

## Using a Reverse AutoFill Keyword Set Lookup

A Reverse AutoFill Keyword Set Lookup allows you to search for and select an AutoFill Keyword Set instance while indexing a document. Once selected, the AutoFill Keyword Set is used to populate Keyword Type values on the document.

---

**Note:** Depending on your configuration, for existing Keyword Type values on a document, selecting an AutoFill Keyword Set from a Reverse AutoFill Keyword Set Lookup will either add additional instances of Keyword Types or replace existing Keyword Type values. For more information, contact your system administrator.

---

To use a Reverse AutoFill Keyword Set Lookup to find an AutoFill Keyword Set:

- From the interface you are using to index the document, select a Document Type that has a Reverse AutoFill Keyword Set configured.

---

**Note:** Reverse AutoFill Keyword Sets are configured in the Configuration module. For more information, contact your system administrator.

---

2. Click the **Lookup** magnifying glass icon displayed in the **Keywords** section.

 **Import**

Document Type Group  
<All> 

Document Type  
AR - Receivable Invoice 

File Type  
PDF 

Document Date  
08/04/2017 

 **Keywords**  

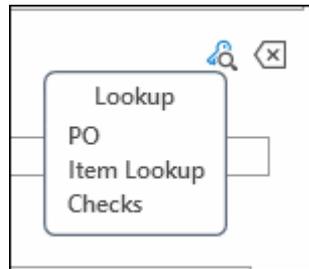
PO #

Customer #

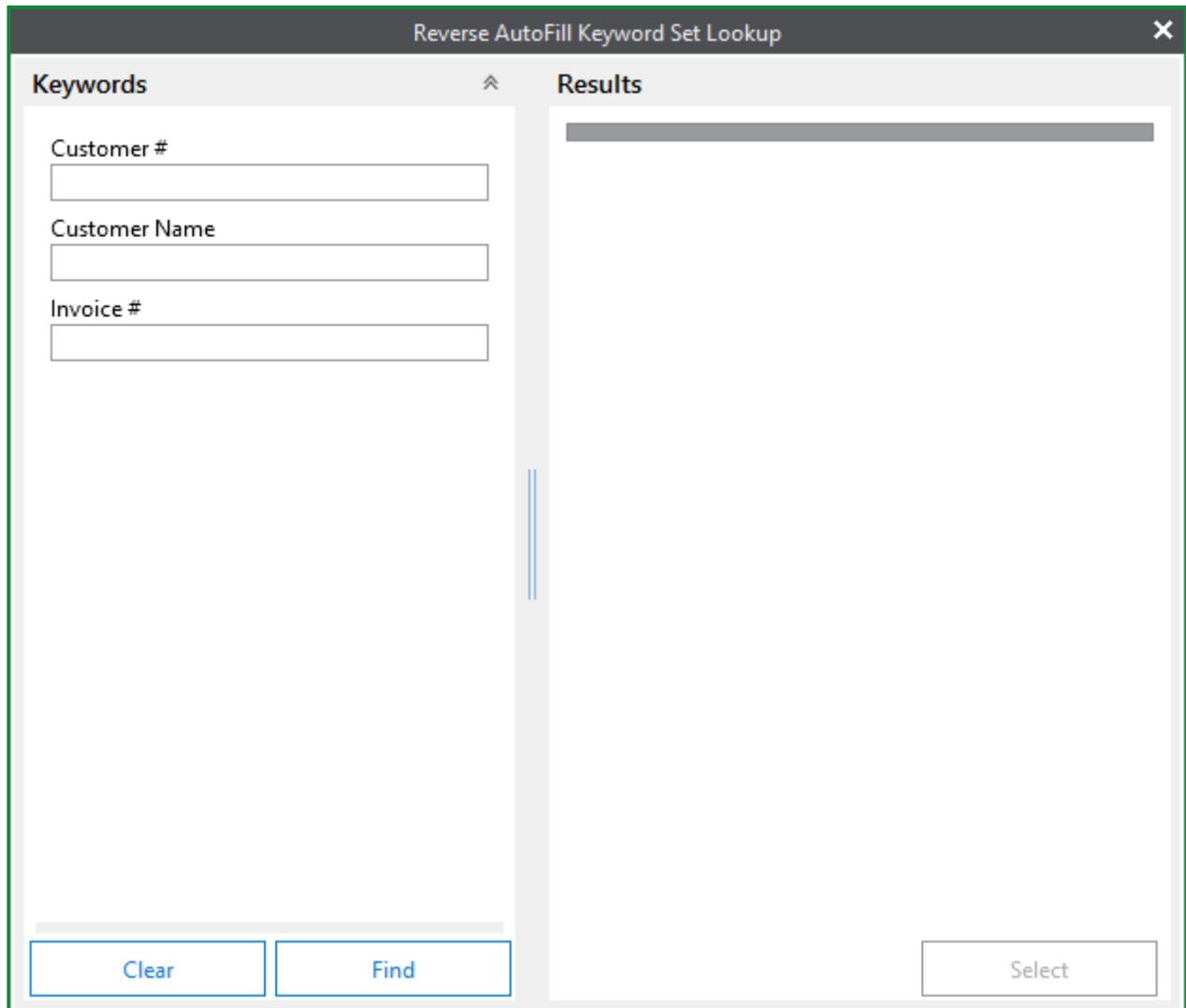
Customer Name

Invoice #

3. Select the desired lookup if more than one lookup is available.



The **Lookup** dialog box is displayed.



Reverse AutoFill Keyword Set Lookup

**Keywords**    ^

Customer #

Customer Name

Invoice #

**Results**

---

**Note:** For example purposes, this documentation refers to the **Lookup** dialog box, but the actual title of the dialog box is configured by your OnBase administrator.

---

- In the **Search** dialog box, enter any known Keyword Values in the **Keywords** pane and click **Find**.  
AutoFill Keyword Sets that match the search criteria are displayed in the **Results** pane.

PO #	Customer #	Customer Name	Invoice #
2110	321	RESTFUL INN INC	1378
2111	321	RESTFUL INN INC	1396
2125	321	RESTFUL INN INC	1538
2135	321	RESTFUL INN INC	1780
2104	321	RESTFUL INN INC	1225
2106	321	RESTFUL INN INC	1311
2122	321	RESTFUL INN INC	1536
2132	321	RESTFUL INN INC	1648

- Select the appropriate AutoFill Keyword Set and click **Select**.

**Note:** For example purposes, this documentation refers to the **Select** button, but the actual name of the button is configured by your OnBase Administrator.

The **Lookup** dialog box is closed and the **Keywords** section of the indexing context is updated with the Keyword Values from the selected AutoFill Keyword Set.

## 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

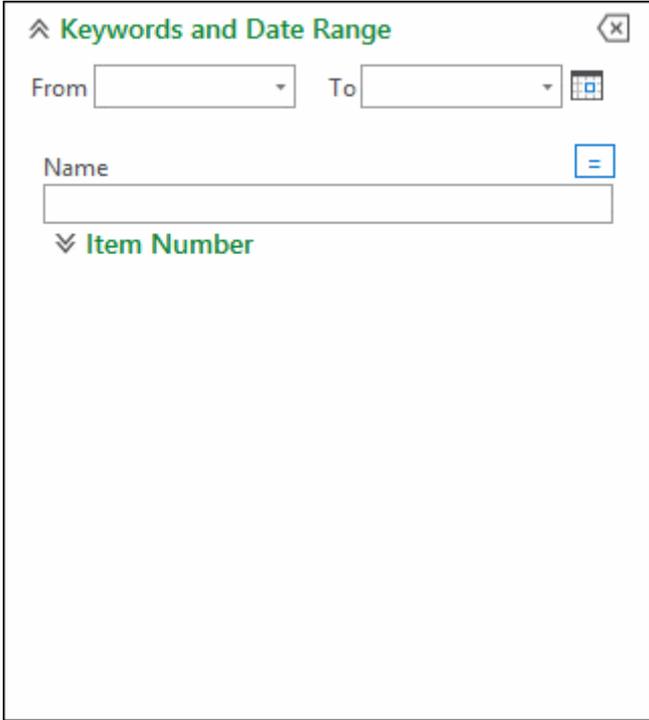
Some Keyword Types have been configured to provide smart searching capabilities for retaining relationships in retrieval.

### 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, the Keyword Types are part of a Multi-Instance Keyword Type Group:



The screenshot shows a form titled "Keywords and Date Range" with a close button in the top right corner. Below the title, there are two dropdown menus labeled "From" and "To", with a calendar icon to the right of the "To" dropdown. Below these is a "Name" label followed by a text input field and an equals sign button. Underneath the input field, the text "Item Number" is displayed in red, preceded by a downward-pointing chevron icon, indicating that the group is collapsed.

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 down arrow next to the first Keyword Type to show the entire group:

Keywords and Date Range

From  To

Name  =

Item Number  =

Item Description  =

Quantity  =

Amount  =

Total Amount  =

## 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.

---

**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.

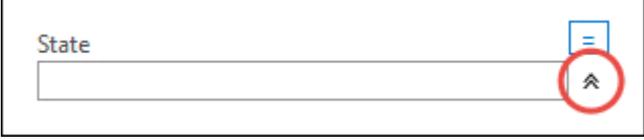
---

## Multi-Instance Keyword Type Groups

If you double-click on the name of a Multi-Instance Keyword Type Group, another instance of the entire Multi-Instance Keyword Type Group will be added.

## Keywords with 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.

When the cursor is in the Keyword Type's field, you can press **F5** to open the drop-down list if one exists. You can use the up and down arrow keys to select from the Keyword Values displayed in the drop-down list. When you have selected the appropriate Keyword Value, press **Enter**.

If you type a partial value before pressing **F5** or opening the drop-down list, the drop-down list will begin with those values that match the partial value.

Your system administrator determines if a drop-down list appears for a Keyword Type, and what values will be in the list.

---

**Note:** You are only able to view the first 100 entries in a drop-down list. To reduce the values displayed in a drop-down list, type several characters into the field before expanding the drop-down 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.

## 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.

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:

Operator	Description
=	An exact Keyword Value match.
<>	Keyword Values that are not equal to the specified value.
>	Keyword Values that are greater than the specified value.
>=	Keyword Values that are greater than or equal to the specified value.
<	Keyword Values that are less than the specified value.
<=	Keyword Values that are less than or equal to the specified value.
"	The string literal operator (double quote) 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 treated as a standard character.

---

**Note:** Available operators vary depending on the Keyword Type. For example, only the =, <>, and " operators are available for alphanumeric Keyword Types.

---

## 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.

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

Operator	Description
<b>And</b>	Searches for documents containing the Keyword Values preceding and following the logical operator.
<b>Or</b>	Searches for documents containing either the value preceding the logical operator or the value following the logical operator.
<b>To</b>	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.

---

**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, or searches that include wildcards may return unexpected results.

---

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

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

## 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 are saved with documents only if Keyword Type values are populated (in other words, 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 is removed.

You cannot add multiple values to Keyword Types in a Single-Instance Keyword Type Group or a Cascading Data Set. You can add multiple values to Keyword Types in a Multi-Instance Keyword Type Group.

See your system administrator if you have questions about the configuration of Keyword Types on the Document Type.

---

**Note:** When documents are indexed with multiple instances of the same Keyword Type, multiple results for the same document can be returned in a Document Search Results list. This occurs because of the way that OnBase searches for multiple Keyword Values.

---

# Re-Indexing

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

---

**Note:** Some Document Types are configured to require Keyword Values to be entered in order to create and/or retrieve documents. Required Keyword Values are displayed in red for these operations, which may include the following: Document Retrieval, Import, and Add/Modify Keywords.

---

## 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 177](#).

---

1. Save any changes that you have made to a document before re-indexing.

---

**Note:** If you open a document in the Document Viewer and select **Re-Index**, a lock is applied, and the document cannot be re-indexed from the Document Search Results list.

---

2. From an open document or from a selected document in a Document Search Results list, right-click and select **Re-Index** or click **Re-Index** on the **Document** tab.

---

**Tip:** In a Document Search Results list, you can select multiple documents and re-index them in the order in which they were selected.

---

3. The **Re-Index** pane is displayed.

---

**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.

---

---

**Note:** The Document Type of a Unity Form file type document or an Image Form file type document cannot be changed during re-indexing.

---

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

---

**Tip:** You can select a new Document Type by typing the name of the Document Type.

---

To filter this list, you can first select a Document Type Group from the **Document Type Group** drop-down select list.

---

**Tip:** You can select a Document Type Group by typing the name of the Document Type Group.

---

---

**Note:** The original Document Type is displayed in the **Document Type** drop-down select list, even if it is not in the selected Document Type Group.

---

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 select list.

If you are licensed for EDM Services, the destination Document Type is configured with the **Prompt for revision** setting, and a document with matching keywords exists, the **Document Revisions** dialog box is displayed when the destination Document Type is selected from the **Document Type** drop-down select list. For more information, see the **EDM Services** module reference guide.

---

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

---

---

**Caution:** If you are re-indexing a document associated with a Keyword Type Group (KTG) or Multi-Instance Keyword Type Group (MIKTG) filled by an AutoFill Keyword Set to another Document Type associated with the same KTG or MIKTG filled by an AutoFill Keyword Set, the AutoFill Keyword Set may unexpectedly re-populate secondary Keyword Values once the Document Type is changed.

For more information, see [Considerations for Re-Indexing Documents and Adding or Modifying Keyword Values on page 177](#).

---

---

**Caution:** When switching between Document Types that share a MIKTG, and there are different values for each Document Type, the Default Values of the new Document Type are appended. If you switch back to the original Document Type, the Default Values of the initial Document Type are not appended unless they have been changed. If you delete all values from the MIKTG before switching Document Types, the second Document Type's Default Values are used.

---

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

---

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

---

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

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

---

**Caution:** After changing Keyword Values, click on a field in the **Re-Index** pane before you click the **Re-Index** button. This will trigger any AutoFill Keyword Sets that may have been affected by the Keyword Value change. If you changed the primary Keyword Value in the AutoFill Keyword Set, press the **Tab** key to trigger the AutoFill Keyword Set. If the primary Keyword Value is associated with multiple AutoFill Keyword Sets, you are prompted to select an AutoFill Keyword Set. You may select an AutoFill Keyword Set by double-clicking. See your system administrator for information regarding your system's AutoFill Keyword Set configuration. Click **Close** to cancel changes if you get undesired results.

---

---

**Note:** If the document is still required after re-indexing, it is recommended that the document is closed and reopened. Doing so ensures that the privileges associated with the new Document Type are respected.

---

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. If you are re-indexing an image or PDF file, the **Split** button is displayed. Click it to open the **Document Separation** window, where the document can be edited and separated into multiple documents.
11. Click **Re-Index** to save your changes and re-index the document. Click **Close** to cancel changes.

---

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

---

---

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

---

---

**Note:** If the **Re-Index** pane has not finished loading, the **Re-Index** button will be unavailable.

---

## 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. You can use the up and down arrow keys to select from the Keyword Values displayed in the drop-down list. When you have selected the appropriate Keyword Value, press **Enter**.
- 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.

## Re-Indexing Document Revisions

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

The revision process is the same as [Re-Indexing Documents on page 173](#), only you would access documents from the Document Results Search List using the Revisions/Rendition option from the right-click menu. When the **Revisions/Renditions** dialog box is displayed, select the oldest revision and re-index as needed. All options are available during a regular re-indexing, including the ability to change the file type.

## 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** pane. Keyword Values are added or modified in the **Add/Modify Keywords** pane.

---

**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** pane.

---

- **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** pane before clicking the **Re-Index** button, or if the Secondary Keyword Values are changed in the **Re-Index** pane 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 the document's appearance is dependent on Keyword Values.

- **Affect Workflow**

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

---

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

---

- **Notes and Annotations**

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

When re-indexing documents, the following keyboard shortcuts are available:

Keyboard Shortcut	Action
Esc	Closes the <b>Re-Index</b> pane.



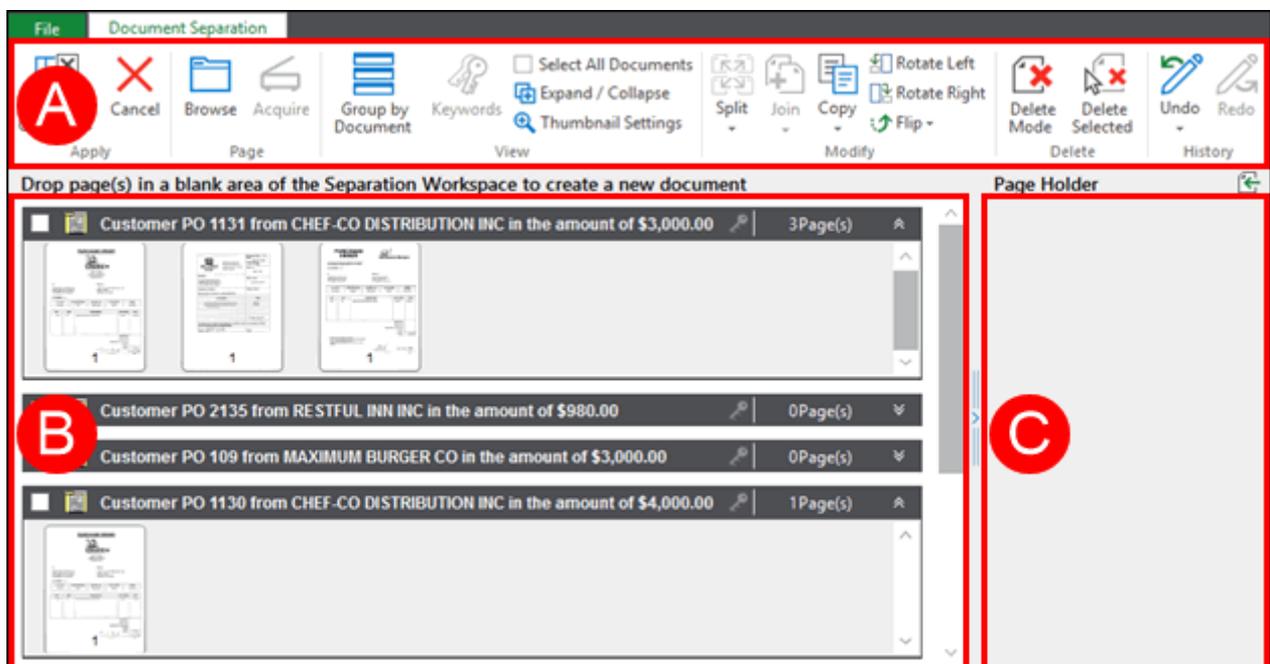
## Separating Image and PDF Documents

PDFs and documents assigned the default Image File Format or a custom file type based off of an image file type can be separated into multiple new documents using the **Document Separation** layout. In addition to separating documents, you may drag pages between documents, copy pages within documents, or append documents together in the Document Separation window.

**Note:** To use PDF documents in the **Document Separation** layout, your workstation must be licensed for **PDF Framework**. For additional information, contact your system administrator.

**Note:** Sending password-protected PDF documents to the **Document Separation** layout is not supported.

**Note:** Image Rendered PDF documents sent to the Document Separation layout are read-only. The document or its pages may be copied to create a new document of a different file type. For more information about read-only documents, see [Working with Locked and Read-Only Documents in the Separation Workspace on page 190](#).



In the above diagram, the area labeled A is the ribbon menu. The area labeled B is the Separation Workspace (seen here in Document Display Mode). The area labeled C is the **Page Holder**.

**Note:** In order to use ad hoc Document Separation, the user group must have the **Advanced Document Splitter** client based product privilege and the **Separate** User Group privilege. For additional information, contact your system administrator.

The original documents brought into Document Separation are called **source documents**. In Document Display Mode, source documents display the icon of the Document Type.

Source documents can be added to the ad hoc Document Separation window through the following methods:

- Navigating to the **Image** tab on an open document and clicking the **Edit Pages** button.

---

**Note:** Clicking **Edit Pages** opens the document in a Document Separation window separate from previously opened Document Separation windows. Additional documents sent to Document Separation are not added to a Document Separation window opened by clicking **Edit Pages**, and they must be manually dragged and dropped from a Document Search Results list.

---

- Right-clicking an open document or document(s) in a document retrieval hit list and selecting **Send To | Document Separation**.
- Clicking **Send To | Document Separation** from the ribbon menu of an open document.
- Dragging and dropping from a document retrieval hit list into a previously-opened Document Separation window.

Only one instance of a document may be added to the Document Separation window at a time. If a duplicate document is dragged and dropped into the Document Separation window, a warning is displayed and the document is not added.

---

**Note:** If a document is configured to be revisable, only the latest revision of the document can be split. Earlier revisions are displayed in the Document Separation window as read-only. Depending on your system configuration, revisions are created in Document Separation when a document is modified.

---

---

**Note:** If open, the Re-Index pane or the Add/Modify Keywords panel will be closed when the document is sent to the ad hoc Document Separation window.

---

See the following topics to learn about the available features in the Document Separation window:

- [The Separation Workspace on page 182](#)
- [Viewing and Editing Page Details in Document Separation on page 191](#)
- [Creating and Editing Documents in the Separation Workspace on page 192](#)
- [Importing a New Document in the Separation Workspace on page 205](#)

## The Separation Workspace

Documents are separated, appended, reordered, and indexed in the **Separation Workspace** within Document Separation. The Workspace can be used with two display modes: **Document Display Mode** and **Page Display Mode**.

To switch between display modes, click the **Group by Document** button in the ribbon:



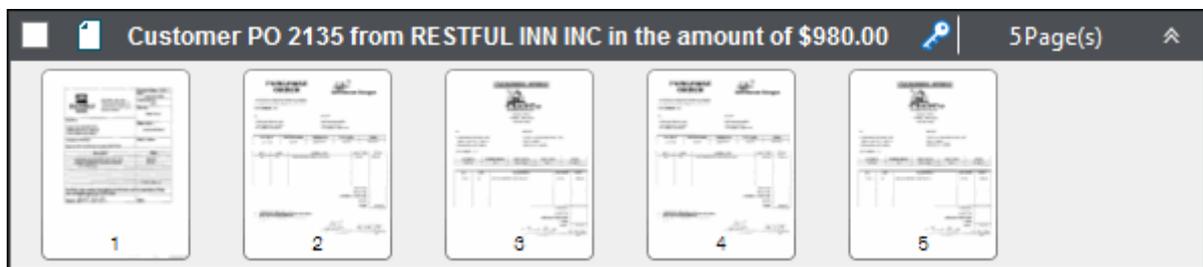
For more information on the two display modes, see the sections below.

## Document Display Mode

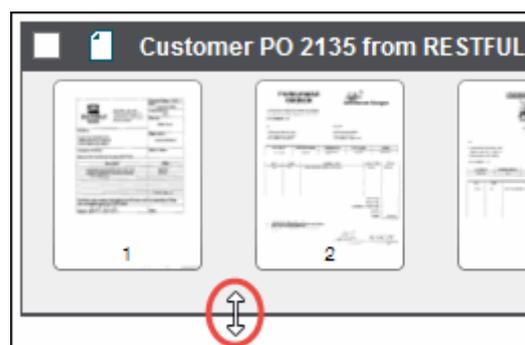
**Document Display Mode** is enabled when the **Group by Document** button in the toolbar is selected:



In Document Display Mode, each document is displayed in a row of the Separation Workspace. Rows are labeled in the Document Header with the name of the document and the page count:



To expand a row of the Separation Workspace in order to see additional pages that belong to the document being worked with, place your mouse pointer over the row's border, and click and drag:




---

**Note:** Expanded documents may return to default size if scrolled out of view.

---

To collapse a specific document completely, click the **Collapse Row** button in the Document Header:



To expand a collapsed document, click the **Expand Row** button in the Document Header:



You may also use the **Expand / Collapse** button in the **View** ribbon group to expand and collapse documents in Document Display Mode:




---

**Note:** This button is not available in Page Display Mode.

---

You may also maximize the main Client window and resize it to fit across multiple monitors. Collapse the **Page Holder** to view more page thumbnails horizontally.

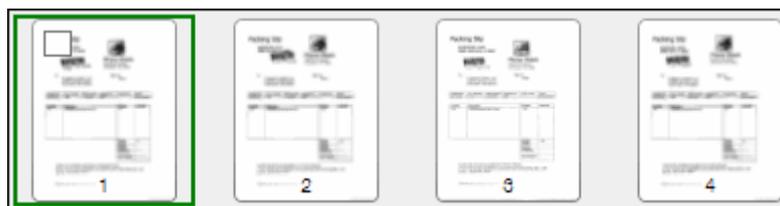
## Page Display Mode

**Page Display Mode** is enabled when the **Group by Document** button in the toolbar is not selected:

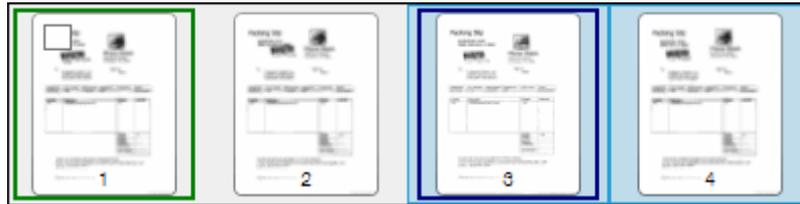


Page Display Mode displays all document pages at once in the Separation Workspace.

The first page of each document is bordered in green. Subsequent pages display no border:



Select a page in the Separation Workspace by left-clicking. Select multiple pages by holding **Ctrl** and left-clicking. Selected pages are highlighted in light blue. The active page is bordered in dark blue:



Navigate between documents and pages quickly in Page Display Mode by using the arrow keys on the keyboard.

You may also maximize the main Client window and resize it to fit across multiple monitors. Collapse the **Page Holder** to view more page thumbnails horizontally.

## Tree Display Mode

Tree Display Mode is only available within batch Document Separation. For more information on Tree Display Mode, see the **Document Imaging** module reference guide.

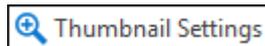
## Adjusting Thumbnails in the Separation Workspace

The thumbnails viewed in this workspace can be adjusted to fit your needs. You can adjust the size of the thumbnails and enable or disable **thumbnail zooming**.

Thumbnails can be automatically zoomed when you hover over the thumbnail image with your mouse. When you move the mouse away from the thumbnail image, the enlarged view will shrink back to normal thumbnail size. This temporary enlargement of thumbnails allows you to quickly distinguish between pages without having to leave the layout.

To adjust the thumbnails:

1. Click the **Thumbnails Settings** button:



2. Select the size of the thumbnail in the **Thumbnail Settings** options dialog box:

Choices include:

- **Small** (200 x 200 pixels)
- **Medium** (300 x 300 pixels)
- **Large** (400 x 400 pixels).
- **Custom** - Set your own custom size for thumbnails by selecting **Custom** and inputting your own dimensions. **Width (pixels)** and **Height (pixels)** on Custom thumbnail sizes can range from 100 to 1000 pixels.

---

**Note:** Values entered into the **Custom** fields are saved even if you select a different Thumbnail Size.

---

3. Select **Zoomed Thumbnails** if you would like to enable thumbnail zooming.
4. If you selected Zoomed Thumbnails in Step 3, you may also adjust the **Zooming Delay** by inputting the desired delay (in seconds).  
Zooming Delay is the amount of time you must hover over a thumbnail before it is enlarged.
5. Click **Save** to save changes and close the dialog box, or click **Cancel** to close the dialog box without saving changes.

---

**Note:** Thumbnail settings are saved and persist across OnBase sessions.

---

**Note:** Changes made to thumbnails apply to both the Separation Workspace and the Page Holder.

---

## Selecting Documents in the Separation Workspace

Selecting entire documents in the Separation Workspace differs slightly between display modes. Selection of pages and documents persists across display modes.

In all display modes, click **Select All Documents** to select all documents in the Separation Workspace:




---

**Note:** If the **Select All Documents** option has been selected and a new document is added to Document Separation, the **Select All Documents** button will become unselected. The newly added document is not selected in the Separation Workspace. Selecting the **Select All Documents** button again will select all documents, including the newly added document.

---

When selecting pages, hold **Ctrl** to select a page without deselecting previously selected pages.

If a page is selected and the **Shift** key is held while selecting another page, all pages between the two selected pages will be selected.

## Selecting Documents in Document Display Mode

To select the entire document in Document Display Mode, click the Document Header.

The check box next to the name of the document in the Document Header will also select the entire document.



If the document is already selected, clicking the check box will deselect the document.

If, when using Document Headers, you would like to add a document to the selection without deselecting the previously selected document(s), hold **Ctrl** as you select the new document.

To select multiple page ranges in multiple documents, hold **Ctrl + Shift** as you select pages.

## Selecting Documents in Page Display Mode

To select an entire document in Page Display Mode, click the check box on the first page of the document:



If the document is already selected, clicking the check box will deselect the document.

---

**Note:** Left-clicking on a page will select the page only. Selected pages are highlighted in yellow. If you attempt to select a single page within a document that is already selected via the check box, the document will become deselected.

---

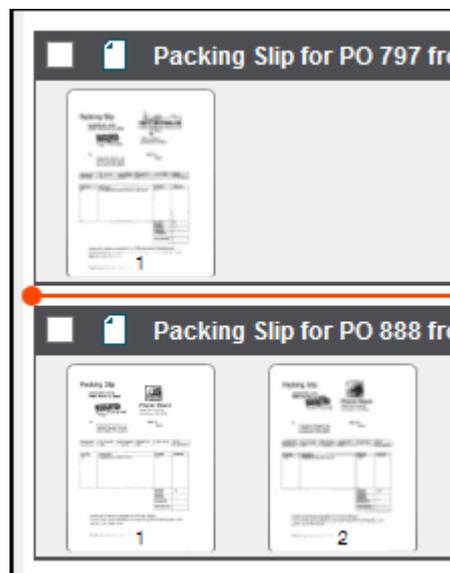
## Reordering Documents in the Separation Workspace

---

**Note:** Documents cannot be reordered when working in Page Display Mode.

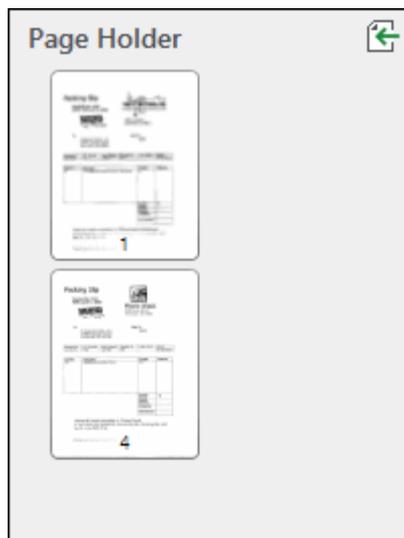
---

To reorder documents, click the Document Header of the document you would like to move and drag the document to an empty space in the Separation Workspace. A red bar appears between documents to show where the selected document will be placed when the mouse button is released, as shown in the Document Display Mode example below:



## Using the Page Holder

Document Display Mode and Page Display Mode in the Document Separation layout both offer a **Page Holder** to the right of the workspace area:



Pages can be dragged and dropped into the Page Holder for later use. Pages in the Page Holder can be organized by dragging them.

To remove a page from the Page Holder, click and drag the page into a document in the Separation Workspace or click and drag it to an empty space within the Separation Workspace to create a new document. Multiple pages can be dragged at once.

If you change your mind and decide that you would like pages in the Page Holder to return to their original documents, you can click the **Page Holder Actions** button:



Clicking this button reveals the following Page Holder Options:

- **Return Selected Held Pages** - Clicking **Return Selected Held Pages** will return highlighted pages within the Page Holder to their original documents.
- **Return All Held Pages** - Clicking **Return All Held Pages** will return all pages within the Page Holder to their original documents.

To collapse the Page Holder, click the arrow displayed on the left border of the Page Holder. When collapsed, click the arrow again to expand the Page Holder.

---

**Note:** The Page Holder automatically collapses if the **Add/Modify Keywords** panel is displayed.

---

## Working with Locked and Read-Only Documents in the Separation Workspace

Locked and read-only source documents can be brought into the ad hoc Document Separation window, but these locked documents can not be edited in the same fashion as unlocked documents are. Pages dragged out of a locked document will be copied to their destination. The original source document will remain intact and unchanged within the Document Separation layout. Pages cannot be dragged into a locked document.

If attempting to append an unlocked document to a locked document by performing a Partition/Append task on the last page of the locked document, the unlocked document's pages will not be moved into the locked document.

In Document Display Mode, locked documents are labeled with a lock icon in the Document Header:



Hovering over this icon will display who holds the lock on this document.

In Page Display Mode, pages of locked documents are bordered in black and display a lock icon in the corner:



## Saving Documents

Click the **Save and Close All** button in the **Apply** ribbon group to save all documents in the Document Separation layout to OnBase and close the Document Separation layout.



---

**Note:** If no changes have been made to documents or keyword values since opening the Document Separation layout or since you last saved, this button will be disabled.

---

Do not save until all desired modifications have been made to a particular document (if selecting **Save Selected**) or to all documents in the Separation Workspace (if selecting **Save and Close All**). The document(s) will be removed from the Document Separation layout and imported into OnBase after saving. All modifications including copying pages, clicking and dragging pages, appending, splitting, and re-indexing documents are saved at this time.

Source document modifications, such as deleting pages, deleting the entire document, re-ordering pages, flipping, rotating, and re-indexing are saved along with documents created in Document Separation.

Click the bottom portion of this button to reveal the **Save Selected** option. Clicking **Save Selected** will save and close only new documents created in Document Separation that have been selected in the Separation Workspace.

---

**Note:** Source documents cannot be saved using **Save Selected**.

---

If attempting to exit the Separation Workspace without saving, you will be prompted to save any unsaved changes.

---

**Tip:** If you want to make source document modifications, such as re-ordering pages, but keep the original copy intact, copy the source document (**Copy Document**) immediately after opening the **Document Separation** layout. Treat the copy of the source document as you would the source document. When you are finished modifying the copy of the source document, click **Save and Close All** to keep the original document intact and save any modifications to the copy of the source document.

---



---

**Note:** If the user has the delete privileges, removing all pages from the source document(s) and clicking **Save and Close All** will result in the document(s) being deleted from OnBase. If the user does not have delete privileges, the last page will be copied. The copy will remain in the source document so that it cannot be deleted.

---

Depending on how the Document Type is configured, you may be prompted to enter a comment after clicking **Save and Close All**.

---

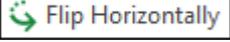
**Note:** All buttons in the ribbon menu are disabled while saving. Documents being saved are unselected and cannot be interacted with while saving.

---

## Viewing and Editing Page Details in Document Separation

Double-clicking the thumbnail image will open a full size version of the page in a **Detailed View**. In this view, you may perform the following actions using the buttons in the ribbon menu:

Option	Button	Description
<b>Zoom In</b>		Zooms in on the page currently open in Detailed View. The keyboard shortcut for this action is <b>Ctrl + Mouse Wheel Up</b> .
<b>Zoom Out</b>		Zooms out on the page currently open in Detailed View. The keyboard shortcut for this action is <b>Ctrl + Mouse Wheel Down</b> .

Option	Button	Description
<b>Rotate Left</b>		Rotates the page 90 degrees counterclockwise. The keyboard shortcut for this action is <b>Ctrl + Left Arrow</b> .
<b>Rotate Right</b>		Rotates the page 90 degrees clockwise. The keyboard shortcut for this action is <b>Ctrl + Right Arrow</b> .
<b>Flip Horizontally</b>		Flips the page horizontally. <b>Note:</b> PDF documents cannot be flipped.
<b>Flip Vertically</b>		Flips the page vertically. <b>Note:</b> PDF documents cannot be flipped.

Modifications made in Detailed View are applied to the document in the Separation Workspace. When you are finished viewing and editing the page, close the Detailed View.

Saving a document in the Workspace saves the changes made in the Detailed View.

You may also use the **Modify** options found in the ribbon of the Separation Workspace to edit selected pages without entering Detailed View.

## Creating and Editing Documents in the Separation Workspace

In addition to editing page details, you can edit documents themselves by adding or removing pages. New documents can also be created using these same processes. There are several ways to create a new document or edit source documents in the Separation Workspace:

- Adding pages through browsing and acquiring
- Clicking and dragging pages
- Joining documents
- Splitting documents
- Copying the document or individual pages within the document
- Deleting pages or documents completely

---

**Caution:** Removing all pages from a new document created in the Separation Workspace will delete the document.

---

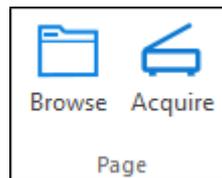
When creating and editing documents in the Separation Workspace, consider the following:

- When splitting a locked document, copies of the selected pages are used to create a new document, but the original selected pages remain in the locked document.
- If you do not have privileges to delete documents, moving all pages from a source document into another document creates a copy of the source document's last page. The source document's last page remains in the source document.
- If the source document belongs to a batch, the new document is added to the same batch.

## Adding New Pages to the Separation Workspace

Pages can be added either as new documents or to existing documents from within Document Separation. Pages can be added by browsing to the appropriate image file on your computer, or by acquiring image files through a device such as a scanner or camera.

Page acquisition options are displayed in the **Page** ribbon group:



### Adding Pages by Browsing

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**Note:** PDF Documents cannot be selected when adding pages by browsing.

---

**Browse** imports page(s) from a drive accessible from your workstation.

To add pages by browsing:

1. Select the document to which you would like to add pages.
2. Click **Browse**.



3. The standard Windows **Open File** dialog box is displayed.
4. Locate the page(s) to import. Pages must be image files.
5. Select the desired page(s).
6. Click **Open** to add the selected documents as pages.

## Adding Pages by Acquiring

**Acquire** scans in the page(s) using a scanner, or imports the image(s) from a scanner, digital camera, or other supported digital storage device.

To add pages using the Acquire option:

1. Select the document to which you would like to add pages.
2. Click **Acquire**.



---

**Note:** The **Acquire** button is enabled when a device is connected to your workstation.

---

**Note:** If more than one device is connected to your workstation, you are prompted to select an imaging device.

---

### If you select a scanner:

1. The device's scanning interface is displayed.
2. Select the desired scan settings, such as image resolution and page size.

---

**Tip:** Depending on your scanning interface, you can receive help by clicking the **Help** button, or clicking the Windows **Help** button in the upper-right corner and then clicking the setting.

---

3. Click **Scan** to add the scanned images as pages.

### If you select a camera:

1. The Windows Image Acquisition (WIA) **Get Pictures** interface is displayed.

---

**Note:** If the camera is not detected, ensure that the Windows Imaging Service is enabled and started. For information on the Windows Imaging Service, consult the Windows help files.

---

2. Select the images to import.
3. Click **Get Pictures** to add the images as pages.

## Clicking and Dragging Pages in the Separation Workspace

Documents can be created and edited by clicking and dragging pages. This operation behaves differently depending on which display mode you are using. In Document Display Mode, it is possible to both create and edit documents when clicking and dragging pages. In both Page Display Mode and Tree Display Mode, it is only possible to edit existing documents when clicking and dragging pages.

If pages are selected to be dragged from multiple different documents, they will be moved into the destination in the order in which they appear in the Separation Workspace.

---

**Note:** Pages dragged out of a locked document will be copied to their destination. The original source document will remain intact and unchanged within the ad hoc Document Separation window. Pages cannot be dragged into a locked document.

---

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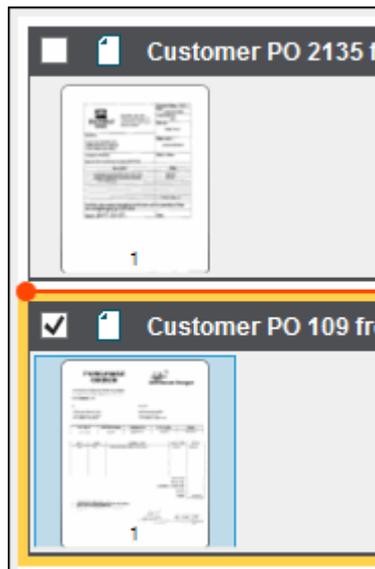
**Note:** If the user has delete privileges, dragging all pages from the source document(s) and clicking **Save and Close All** will result in the document(s) being deleted from OnBase. If the user does not have delete privileges, the last page will be copied. The copy will remain in the source document so that it can not be deleted.

---

## Clicking and Dragging Pages in Document Display Mode

Documents can be created and edited by clicking and dragging in Document Display Mode.

To create a new document, click and drag the page(s) from the original document(s) to an empty space in the Separation Workspace. The possible new insertion point is represented by a red line in the Separation Workspace:



The new document must be indexed after you have finished making changes.

Click and drag the pages, then hold **Ctrl** to copy the pages to the new location instead of dragging the pages away from the existing documents.

---

**Note:** A document that is created by clicking and dragging will inherit the indexing information from the source document that it was taken from. If the document is created using pages from multiple documents, no indexing information will be inherited.

---

To edit an existing document, click and drag the page(s) from one document to another. A red line will appear at the point of insertion:



Edited source documents must be saved by clicking **Save and Close All**.

## Clicking and Dragging Pages in Page Display Mode

To edit a document by clicking and dragging in Page Display Mode:

1. Click and drag the page(s) from one document to the right of the desired leading page. A red line will appear at the point of insertion. For example, in this image, Page 5 is being dragged to be added to the right of Page 1:



2. If the destination suits your needs, release the mouse button and the page(s) will be added to the point of insertion.
3. Edited source documents must be saved by clicking **Save and Close All**.

If a page is dropped to the left of the first page of a new document, it will be inserted as the new first page of that document.

## Joining Documents in the Separation Workspace

Documents can be edited by joining pages to them. There are three methods of joining.



When you click the **Join** button in the **Modify** ribbon group, the three join options are presented:

- **Merge Documents**

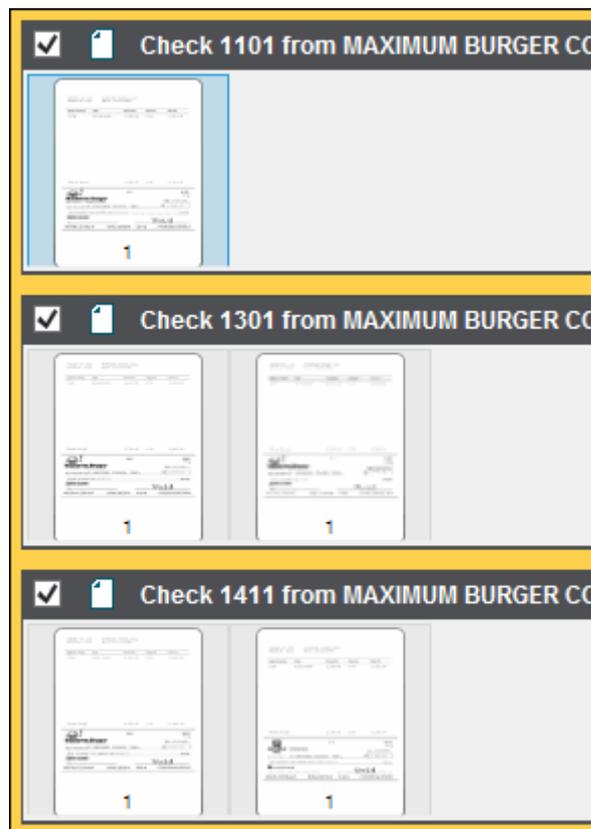
- **Join Pages**
- **Append After Page** (also available as the paperclip icon in the Separation Workspace)

This section covers each Join option.

## Merge Documents

Clicking **Join | Merge Documents** will combine two or more selected documents into one document. Pages will be added to the topmost selected document in the Separation Workspace in the order that the documents appear in the Separation Workspace.

For example, if a Merge Documents operation was performed to the selected documents in the below image, pages from Check 1301 would be added after the page in Check 1101. The pages in Check 1411 would be added after the pages for Check 1101 and Check 1301:



## Join Pages

Clicking **Join | Join Pages** will combine selected pages from many different documents. This operation will move all selected pages in the Separation Workspace to the right of the first page selected. Pages will be joined in the order in which the pages were selected.

---

**Note:** This option is not available in Document Display Mode.

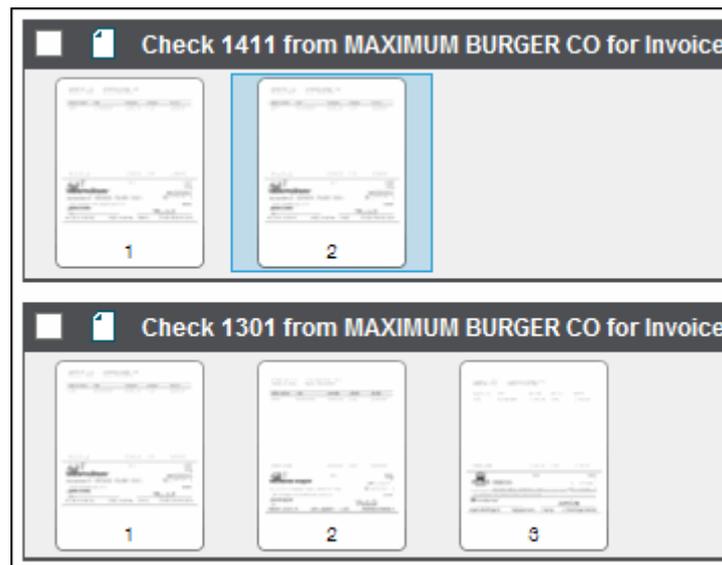
---

If a page is selected from a locked document and a Join Pages operation is performed, the page from the locked document will be copied and joined to the right of the page from the unlocked document. If the locked page is selected first, the pages from the unlocked documents will be added to the right of a copy of the locked page.

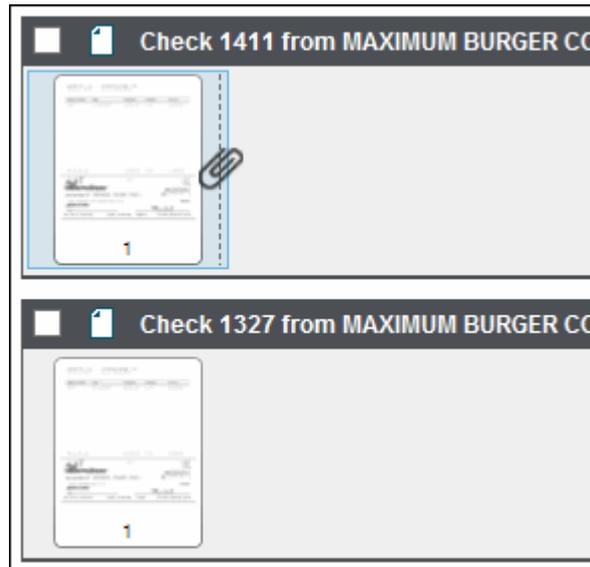
## Append After Page

Click **Join | Append After Page** to append the next document in the Separation Workspace to the selected final page of a document. The Append After Page option is only available when the last page of a document (other than the last document) is selected.

For example, if an Append After Page operation was performed to the documents in the below image, all pages in Check 1301 would be added after the pages in Check 1411:



Appending can also be performed by using the paperclip icon. To use the paperclip icon, place your mouse pointer to the right of the last page of the document to which you wish to append the next document in the Separation Workspace. A dotted line with a paperclip icon will appear:



Clicking this paperclip will append the next document in the Separation Workspace to the document in which you clicked.

## Splitting Documents in the Separation Workspace

Documents can be created and edited by splitting them. Splitting separates the pages of a document to create one or more new documents. There are two splitting options.



When you click the bottom portion of the **Split** button in the **Modify** ribbon group, the two splitting options are presented:

- **Split** (also available as the scissors icon in the Separation Workspace)
- **Break into Documents**

Use **Split** when making one document into two documents. Split allows you to select the exact page on which you would like to separate the documents. Use **Break into Documents** when separating a single document into many documents. Break into Documents might be used if you scanned many documents of a common length at once and it was brought into OnBase as one large document. This section covers each Split option.

## Split

To create a new document in the Separation Workspace by using the **Split** option:

1. Select the page in the document that will become the first page of the new document.

---

**Note:** The first page of the document cannot be selected.

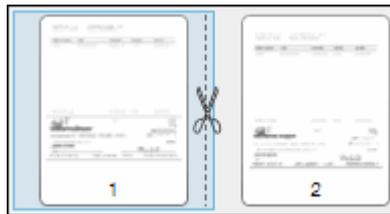
---

2. Click **Split**:



3. The new document will appear below the document from which it was split in the Separation Workspace.

In addition to using the **Split** button in the ribbon, you can also use the scissors icon to separate documents. To use the scissors icon, place your mouse pointer between pages in a document so that a dotted-line and scissors icon appears between the pages:



Click this dotted-line to split the document. Pages after the dotted-line will become a new document. This new document will appear below the document from which it was split in the Separation Workspace.

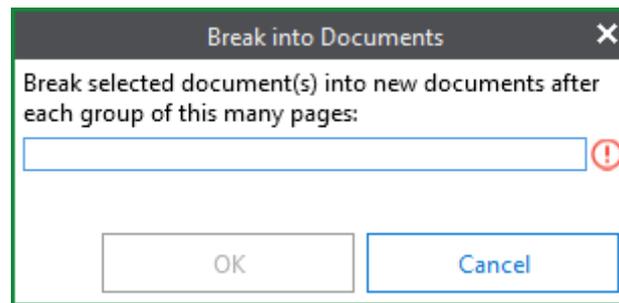
### *Using the Break into Documents Option*

New documents can be created by clicking **Split | Break into Documents**. When you click **Split | Break into Documents**, four options are available:

- **Every Page**
- **Every Other Page**
- **Every Three Pages**
- **Custom**

Each of these options designates where a break will occur in a selected document. For example, clicking **Every Page** will cause every page in a document to become its own new document. Clicking **Every Other Page** will separate the document after every other page and **Every Three Pages** will separate the document after every third page.

Clicking **Custom** allows you to select a custom interval for splitting documents. This can be set in the **Break into Documents** dialog box:



To open the **Break into Documents** dialog box and input a custom interval:

1. Click **Split | Break into Documents | Custom**. The **Break into Documents** dialog box is opened.
2. Input the number of pages after which you would like to break the documents. The number must be greater than or equal to 1 and must also be less than the number of pages in the document. For example, if a document has four pages, you could input 1, 2, or 3. If a document has six pages, you could input any number from 1 to 5.
3. Click **OK** to break documents into the custom interval.

## Copying Pages and Documents in the Separation Workspace

Documents can be created and edited within the Separation Workspace by copying. Entire existing documents or select pages can be copied.



When you click the bottom portion of the **Copy** button in the **Modify** ribbon group, three options are presented:

- **Copy Document**
- **Copy Pages to a New Document**
- **Copy Pages in Place**

Clicking the main portion of the **Copy** button will perform a Copy Document operation.

A document that is created by clicking **Copy Document** or **Copy Pages to New Document** will inherit the indexing information from the source document that it was copied from. If the new document is created using pages from multiple documents, no indexing information will be inherited.

## Copy Document

Click the **Copy Document** button to copy the entire selected document. The top portion of the **Copy** button also performs this operation:



---

**Note:** If no documents are selected or if only individual pages are selected, the top portion of the **Copy** button will be unavailable.

---

The new document is displayed in the Separation Workspace below the source document.

---

**Note:** A document that is created by clicking **Copy Document** will inherit the indexing information from the source document that it was copied from.

---

## Copy Pages to New Document

Click **Copy Pages to New Document** to copy individual selected pages to a new document. Pages can come from one or more documents.

The new document is displayed at the bottom of the Separation Workspace.

---

**Note:** A document that is created by clicking **Copy Pages to New Document** will inherit the indexing information from the source document that it was copied from. If the new document is created using pages from multiple documents, no indexing information will be inherited.

---

## Copy Pages in Place

Click **Copy Pages in Place** to copy selected pages within the same document. The duplicate page will appear to the right of the existing page.

Multiple pages from different documents can be copied in place at once.

## Deleting Documents or Pages in the Separation Workspace

To delete content in the Separation Workspace, you can mark selected documents for deletion or enter **Delete Mode**.

To mark pages and documents for deletion select the page(s) and document(s) to be deleted and then click the **Delete Selected** button in the **Delete** ribbon group:



Pages marked for deletion will display a red X:



After clicking **Delete Selected**, you may select additional pages and documents to be marked. Click **Delete Selected** again to mark these additional pages.

If you select a document already marked for deletion and a document not yet marked and then click **Delete Selected**, the unmarked document will be marked while the marked document will go unchanged - the previously marked document will not be unmarked by this action. To unmark documents, select only marked documents and click **Delete Selected**.

To enable **Delete Mode**, click the **Delete Mode** button in the **Delete** ribbon group:



A banner will be displayed to indicate that Delete Mode is enabled.

Left-click pages you would like to mark for deletion. A red X is displayed on all pages that will be deleted.

To retain the page(s) that were marked for deletion, click the page(s) again while in Delete Mode.

Select **Browse** or **Acquire** to import new documents. Select a document, and select Browse or Acquire to import additional pages.

In **Document Display Mode**, select the key icon in the Document Header to modify Keywords. For revisable documents, select the comment icon in the Document Header to create or modify comments.

---

**Note:** All other actions are disabled while in **Delete Mode**.

---

In both Delete techniques, the marked pages and documents will be deleted after saving.

## Undoing and Redoing Actions in the Separation Workspace

Specific actions performed in the Separation Workspace can be undone. Undone actions can then be redone.

The following actions can be undone:

- **Append**
- **Merge Selected Documents**
- **Merge Selected Pages**
- **Split**
- **Break into Documents**

- **Copy Documents**
- **Copy Selected Pages**
- **Drop to Create a New Document**
- **Mark Page(s) for Deletion**
- **Rotate**
- **Flip**
- **Browse**
- **Acquire**

To undo an action, click the **Undo** button:



To undo all qualifying actions performed, click **Undo | Undo All**.

To redo the most recently undone action, click the **Redo** button:



---

**Note:** The **Redo** button only becomes available after an action has been undone.

---

## Importing a New Document in the Separation Workspace

After you have finished creating a new document, the document must be saved and uploaded to OnBase. Before saving and uploading, a document must be indexed. To index and save a document created in the Separation Workspace:

1. Select the desired document and click the **Keywords** button in the ribbon menu:



Document and Keyword Type fields are displayed in the **Import** pane. These fields are used to index the newly-created documents that are created in the Separation Workspace.

---

**Note:** Depending on your system's configuration, one or more Keyword Values may be displayed as read-only and/or a masked value.

---

---

**Note:** The **Keyword** panel may display automatically if there is a document with invalid keywords in the Separation Workspace.

---

**Import**

Document Type Group

Document Type

File Type

Document Date

**Keywords** ✕

PO #

Vendor #

Vendor Name

Invoice #

Item	Description
<b>Document Type Group</b>	This drop-down list is used to select the Document Type Group of the currently selected document.
<b>Document Type</b>	This drop-down list is used to select the Document Type of the currently selected document.
<b>File Type</b>	<p>This drop-down list is used to select the File Type of the currently selected document.</p> <p>Choices include Image File Format or PDF.</p> <hr/> <p><b>Note:</b> The File Type of the document will initially be set to the default File Type of the Document Type that is chosen.</p> <hr/>

Item	Description
<b>Document Date</b>	This field is used to determine the Document Date of the currently selected document. Click the arrow at the right end of this field to display a calendar from which the date can be selected.
<b>Keywords</b>	The Keyword Type fields are displayed once a Document Type has been selected from the <b>Document Type</b> drop-down list. Use the keyboard or the mouse to enter data into these fields.

Indexing information from the original document automatically populates these fields for new documents created from the original document. If necessary, this data can be modified or removed.

---

**Note:** Keyword Values are only applied to the newly created document(s) if the Keyword Type is associated with the new document's Document Type.

---

2. To save Keyword modifications to the document and remove it from the Separation Workspace, click **Save and Remove**. If you would like to return to the Separation Workspace without removing the document, click **Close**.

---

**Note:** Clicking **Save and Remove** in the Separation Workspace does not change the document status. To mark a document as indexed, you still must index it outside the Separation Workspace.

---

Depending on how the Document Type is configured, you may be prompted to enter a comment after clicking **Save and Remove**.

## Adding or Modifying Keywords on a Source Document in the Separation Workspace

---

**Note:** The **Modify Keyword** privilege is required to add or edit keywords in Document Separation. For more information, contact your system administrator.

---



---

**Note:** The **Keyword** panel may display automatically if there is a document with invalid keywords in the Separation Workspace.

---

Keywords on source documents can be added or modified from the Document Separation window. To add or modify keywords on source documents:

1. Select the desired document and click the **Keywords** in the **View** ribbon group:



Document and Keyword Type fields are displayed in the **Add/Modify Keywords** pane. These fields are used to re-index the original document(s).

---

**Note:** Depending on your system's configuration, one or more Keyword Values may be displayed as read-only and/or a masked value.

---

**Add/Modify Keywords**

**Document Type**  
AP - Packing Slip

**Document**  
Packing Slip for PO 662 from PHONE SHACK

**Document Date**  
03/03/2008

⤴ **Keywords**

PO #  
662

Vendor #  
135

Vendor Name  
PHONE SHACK

Invoice #  
3110

Close

2. Add or edit keywords as needed. Modified fields are highlighted in blue. For more information on editing keywords within an Add/Modify Keywords pane, see [Add / Modify Keywords](#) on page 1.

- To re-index the source document with the modified or newly-added keywords, click the **Close** button. The Add/Modify Keywords panel is hidden and documents will be re-indexed when saved.

## Working with Comments on Revisable Documents in the Separation Workspace

If a document that allows revisions is brought into the Separation Workspace, you may be able to enter comments on it if the Document Type is configured to allow or require comments when edited and saved. Comments can be entered in both Document Display Mode and Page Display Mode. This section outlines adding and editing comments in these display modes.

### Working with Comments in Document Display Mode

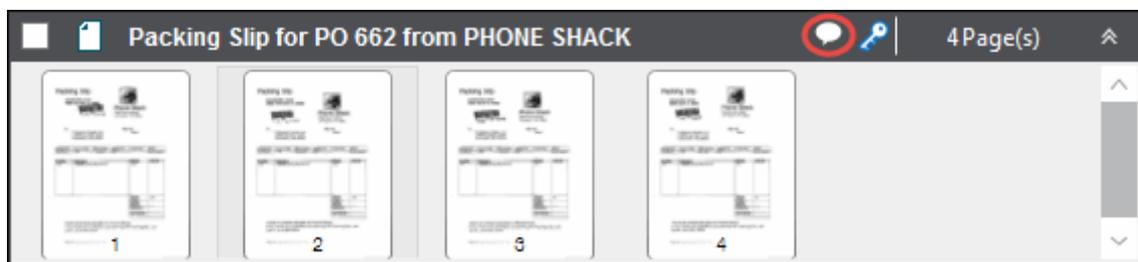
Revisions viewed in Document Display Mode will display one of three comment bubble icons that depict the comment status:

Icon	Comment Status	Description
	<b>Comment Required</b>	Comments must be entered before saving.
	<b>Comment Allowed</b>	Comments may be entered before saving, but are not required.
	<b>Comment Entered</b>	Comments have been entered.

If there is no comment bubble, the document is not configured to allow comments on revisions.

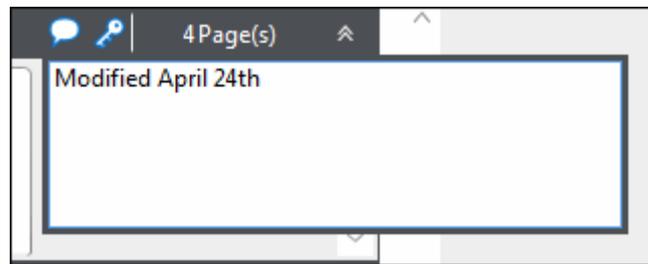
To enter comments or edit previously entered comments in Document Display Mode:

- Click the comment bubble icon in the Document Header:



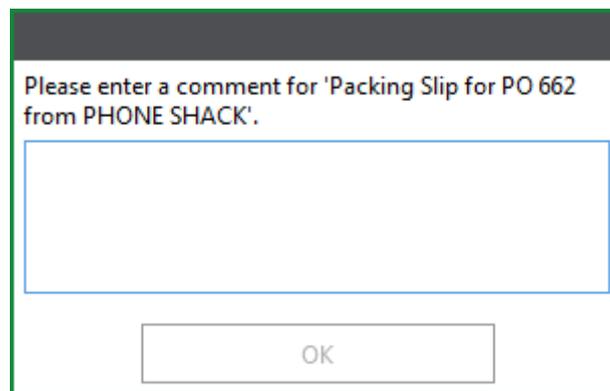
Clicking a blue comment icon will allow you to view or edit unsaved comments previously entered in the Separation Workspace.

2. Enter the desired comment in the comment text box or edit the existing comment:



3. Click anywhere in the Document Separation layout to exit the comment text box.  
If the comment icon was previously red (indicating that a comment is required) or white (indicating that a comment is allowed), the icon will become blue (indicating that a comment has been entered).

If a document that requires a comment is saved before a comment has been entered, a dialog box displaying the text **Please enter a comment for [Document Name]** is opened:



The document cannot be saved until a comment has been entered and you have clicked **OK**.

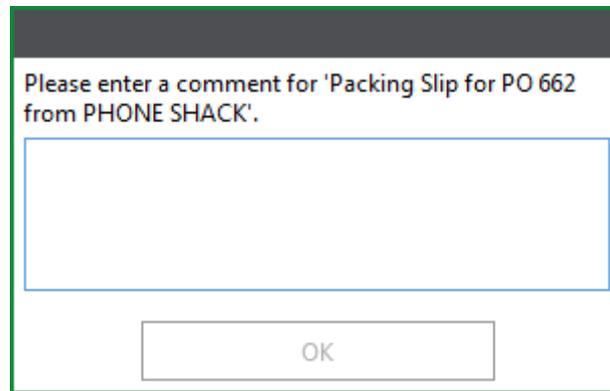
---

**Note:** Depending on your configuration, if a document that allows revisions is split in the Separation Workspace, you may be prompted to add a comment for the original document and/or the newly created document.

---

## Working with Comments in Page Display Mode

Revisions viewed in Page Display Mode will not display an indication that a comment is required, allowed, or entered. However, when saving a document that requires comments, a dialog box displaying the text **Please enter a comment for [Document Name]** is opened:



Enter the necessary text and click **OK**.

To view the comment bubble icons, switch to Document Display Mode.

---

**Note:** Depending on your configuration, if a document that allows revisions is split in the Separation Workspace, you may be prompted to add a comment for the original document and/or the newly created document.

---

## Keyboard Shortcuts for the Separation Workspace

When working in the Separation Workspace, the following keyboard shortcuts are available:

Shortcut	Action
<b>Delete</b>	Deletes selected pages.
<b>Esc</b>	Exits the <b>Document Separation</b> layout without saving changes.
<b>Ctrl + S</b>	Saves selected documents.
<b>Ctrl + H</b>	Flips selected pages horizontally.
<b>Ctrl + .</b>	Rotates selected pages right.
<b>Ctrl + ,</b>	Rotates selected pages left.
<b>Ctrl + J</b>	Joins selected documents. <b>Note:</b> This operation is only used in Page Display Mode.
<b>Alt and +</b>	Copies selected document.

Shortcut	Action
<b>Ctrl and +</b>	Copies selected pages in new document. <hr/> <b>Note:</b> This operation is not used in Tree Display Mode. <hr/>
<b>Ctrl and Shift and +</b>	Copies selected pages in place. <hr/> <b>Note:</b> This operation is not used in Tree Display Mode. <hr/>
<b>Ctrl + C</b>	Copies individual pages to the clipboard.
<b>Ctrl + X</b>	Cuts individual pages. <hr/> <b>Note:</b> When pasted elsewhere, these pages will be removed from the original document. <hr/>
<b>Ctrl + V</b>	Pastes individual pages. <hr/> <b>Note:</b> When pasting pages from a document that is read-only, the pages in the clipboard will be pasted into a new document. <hr/> <b>Note:</b> This operation is not used in Tree Display Mode. <hr/>
<b>Shift + Click</b>	Selects all pages between two selected pages. Shift must be held while clicking.
<b>Ctrl + Click</b>	Selects or deselects a page without deselecting other pages or documents.
<b>Ctrl + Drag</b>	Copies the page being dragged and dropped instead of moving the page to the new insertion point. <hr/> <b>Note:</b> This operation is not used in Tree Display Mode. <hr/>
<b>Ctrl + Shift</b>	Selects multiple page ranges in multiple documents. These buttons must be held while clicking. <hr/> <b>Note:</b> This operation is only used in Document Display Mode. <hr/>
<b>Ctrl + Delete</b>	Enters <b>Delete Mode</b> .
<b>Alt + Home</b>	Scrolls to the first selected page of a document, if not already in view. <hr/> <b>Note:</b> This operation is not used in Tree Display Mode. <hr/>

Shortcut	Action
Up Arrow	Scrolls up in the Separation Workspace.
Page Up	<b>Note:</b> This operation is only used in Document Display Mode.
Down Arrow	Scrolls down in the Separation Workspace.
Page Down	<b>Note:</b> This operation is only used in Document Display Mode.
Ctrl + Mouse Wheel Up	Zooms in on the page open in Detailed View.
Ctrl + Mouse Wheel Down	Zooms out on the page open in Detailed View.
Ctrl + Left Arrow	Rotates the page open in Detailed View 90 degrees counterclockwise.
Ctrl + Right Arrow	Rotates the page open in Detailed View 90 degrees clockwise.

# 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.

Folders can be sent to other OnBase users by clicking **Send To | Mail Recipient (As Link)** if Unity Pop Files or Unity Pop links are configured. Recipients must have permissions to view the Folder Type and must also be a part of a user group that has access to the File Cabinet.

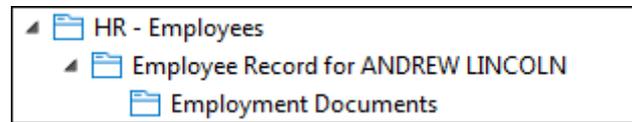
## Folder Definition

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 HR - Employees is the parent to the Employee Record for ANDREW LINCOLN folder, which is the parent to the Employee Documents folder. The Employee Documents folder is the child to Employee Record for ANDREW LINCOLN, and Employee Record for ANDREW LINCOLN is the child to HR - Employees. Notice Employee Record for ANDREW LINCOLN 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.

## 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, 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.
- You can drag documents from outside of OnBase into a folder using the OnBase Client.

Documents imported using this method can be automatically indexed with the static folder's Keyword Values, provided that the folder's Keyword Types also exist on the Document Type.

- 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 containing Keyword Values not matching the folder Keyword Values can be added manually. If a folder is dynamic only, documents cannot be manually placed in or removed from the folder from within OnBase.

- You can drag documents from outside of OnBase into a folder.

Documents imported using this method can be automatically indexed with the dynamic folder's Keyword Values, provided that the folder's Keyword Types also exist on the Document Type. You can change these values in the **Import Document** dialog box, but if you change a Keyword Value the folder uses to dynamically store the document, then the document will not be dynamically stored in the folder. If the folder can contain static contents, then the document will be statically stored in the folder.

## 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.

## Opening File Cabinets and Folders

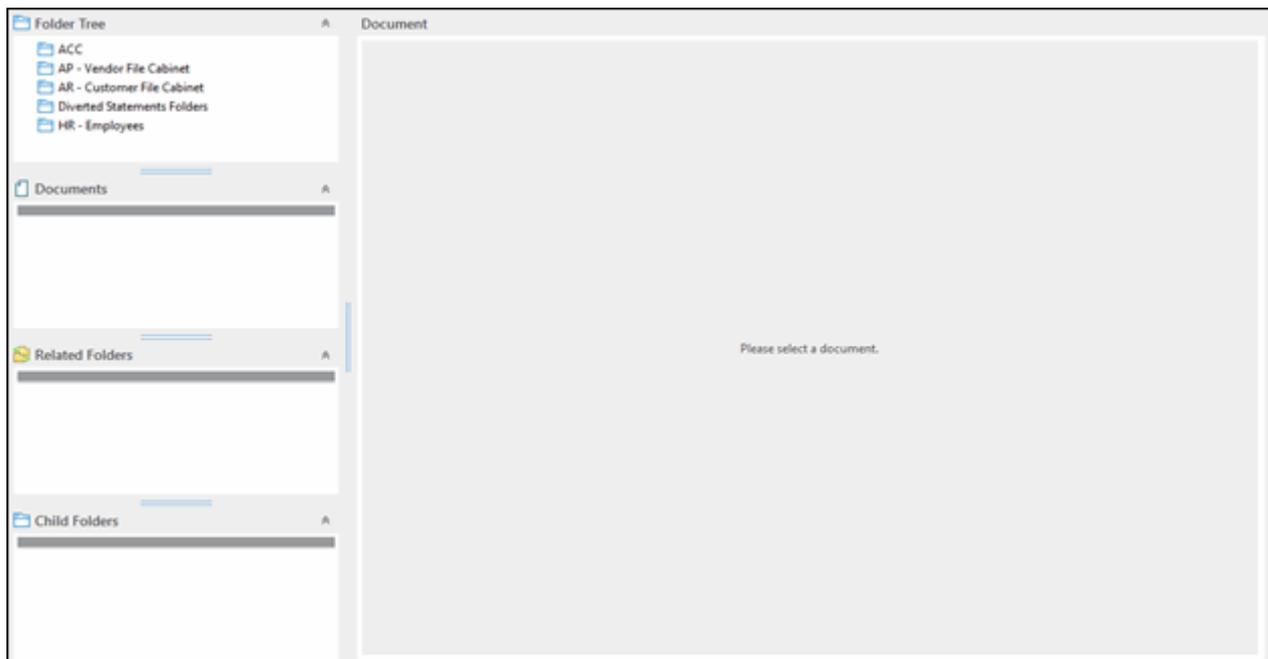
File cabinets contain folders, which contain documents that are placed in the folder from the OnBase Unity Client interface, or that are automatically pulled into the folder according to Keyword Type values (dynamic folders).

In the Unity Client, you can view documents in folders, and in some cases, you can delete documents in folders. Folders are accessed in the Unity Client from the **Home** ribbon.

Your system administrator configures the file cabinets and Folder Types that 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.

To access folders from the Unity Client:

1. Click **File Cabinets** in the **Home** ribbon.
2. The **Browse Folders and File Cabinets** layout displays all available file cabinets and folders:



---

**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.

---

3. To view the contents of file cabinets and folders, click the triangle to the left of the file cabinet or folder, or select the folder.
4. Folders are displayed in the **Folder Tree** pane.

---

**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.

---

5. Select a folder to open it.

To collapse all opened child folders under a parent folder, right-click the parent folder and select **Clear List**. This is different than clicking the triangle next to an opened parent folder, which only hides an expanded folder list.

- The **Child Folders** pane lists all child folders of the selected folder. This pane is collapsed by default.
- The **Related Folders** pane lists all related folders of the selected folder. This pane is collapsed by default if there are no available related folders the user can access.
- 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.

---

**Tip:** To refresh contents of a **Folder** layout pane, right-click within the pane and select **Refresh**. Refreshing the **Folder Tree** pane will also refresh the **Documents** pane.

---

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 220](#)
  - [Working with Folder Pop-up Lists on page 221](#)
6. To open a folder from the **Child Folders** or **Related Folders** pane, use one of the following methods:
    - Double-click on the folder.
    - If child folders are displayed as tabs (in the right pane), click the tab to open the folder.
  7. To open a document, select it from the **Documents** pane.

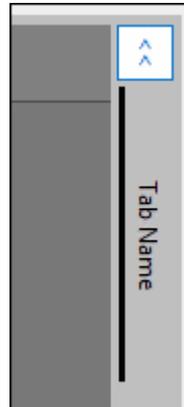
## Opening Multiple Folders Windows

You can open multiple **Folders** windows from the OnBase Unity Client. This feature lets you work in multiple folders concurrently and compare different folders side-by-side. To open another **Folders** window, select **Open In New Window** from the Unity Client's **File** menu.

## Moving Up a Level from a Folder Tab

If both the current folder and its parent folder are displayed as tabs, then you cannot select the parent folder by clicking it in the folder tree.

To select the parent folder, click the up-level tab located above the child folder tabs.



You can select the parent folder also by collapsing it in the folder tree.

## Scrolling Through Folder Tabs

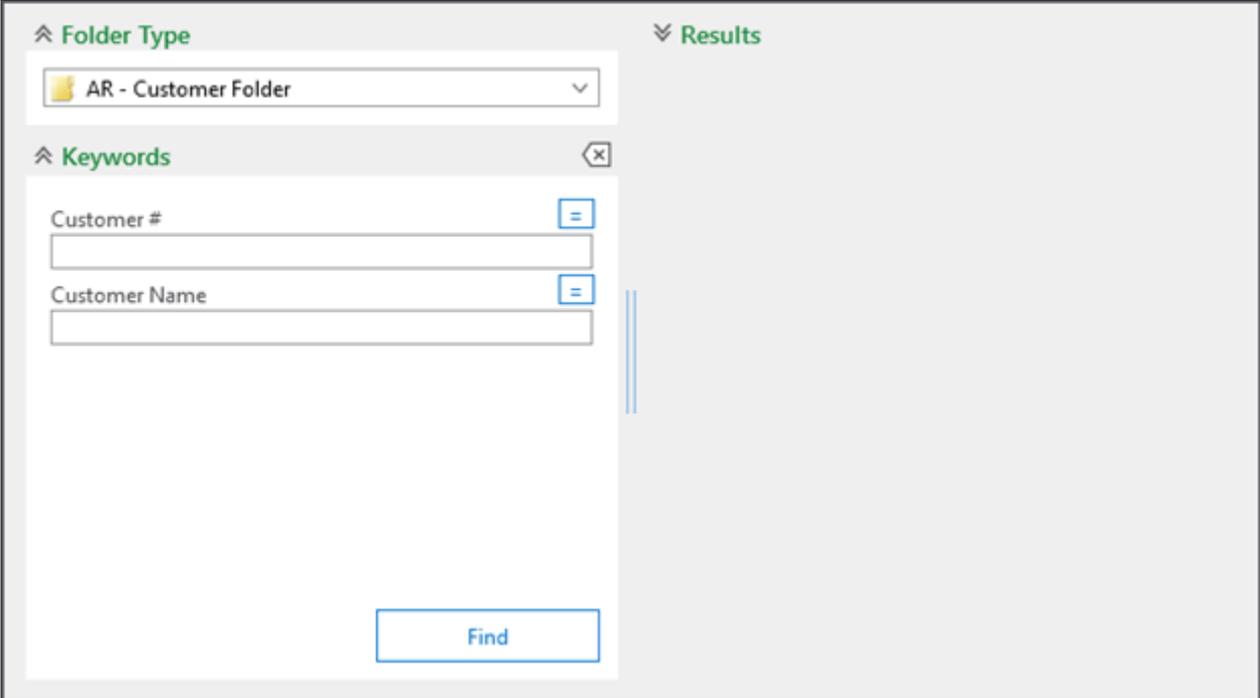
If a folder contains too many child folder tabs to display on the screen, you can scroll through available tabs using the scroll buttons at the bottom of the tabs pane.



## 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 a folder, the folder is inserted into the **Folder Tree** pane for the current session only.

For more information about folder searching, see [Searching for Folders](#) on page 223.



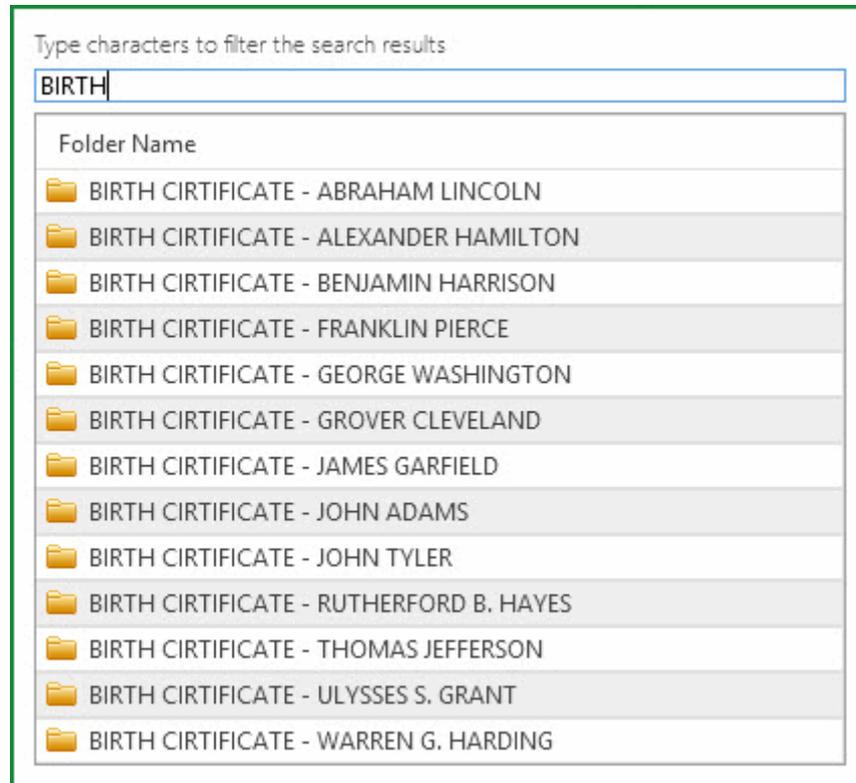
The screenshot shows a dialog box with two main sections: "Folder Type" and "Results".

- Folder Type:** A dropdown menu is open, showing "AR - Customer Folder" with a downward arrow.
- Keywords:** A section with a close button (X) and two input fields:
  - Customer #:** An input field with a search icon (magnifying glass) to its right.
  - Customer Name:** An input field with a search icon (magnifying glass) to its right.
- Find:** A button at the bottom center of the dialog.
- Results:** A large, empty area on the right side of the dialog, intended for displaying search results.

To close the dialog box without searching, click anywhere outside of it, or press **ESC**.

## 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.



To close the pop-up list, click anywhere outside of it, or press **ESC**.

1. To filter the folder list, type characters 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**.

The filter bar may be prepopulated with the static characters in the child folders' Auto-Names, depending on the selected Folder Type. This feature is useful when all child folder Auto-Names start with the same prefix or description. Characters that can vary in the folders' Auto-Names, such as the folder date, are not prepopulated.

---

**Note:** If no folders are displayed, begin typing the name of the folder you need. The text above the filter bar indicates the number of characters required (excluding prepopulated static characters) before folders are displayed. After you've typed the number of characters required, OnBase displays all folders matching your criteria. The minimum number of characters required is configured by your system administrator.

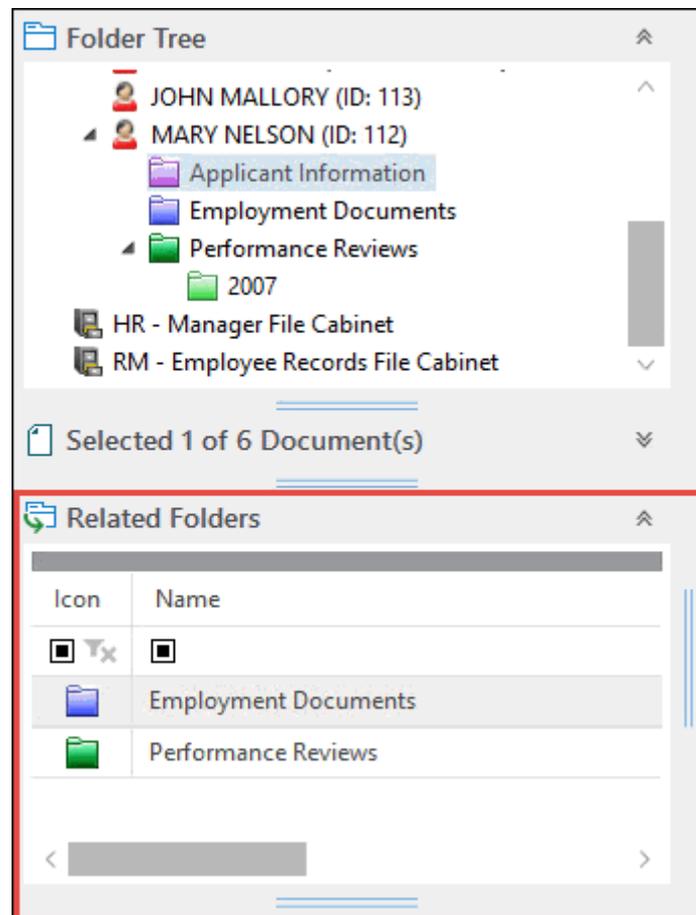
---

2. Double-click a folder to open it. The folder is added to the **Folder Tree** pane.
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.

## 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. Any related folders are listed in the **Related Folders** pane.



## Searching for Folders

You can search for folders using the **Find Folders** pane, 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.

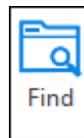
---

**Tip:** Depending on your system configuration, you may be able to search for certain Folder Types using Custom Queries. For more information, see [Retrieval Using Custom Queries on page 60](#).

---

To initiate a folder search:

1. Right-click in the **Child Folders**, **Related Folders**, or **Folder Tree** pane and select **Find Folder**, or click the **Find** button from the **Folder** ribbon:



2. The **Find Folders** pane is displayed.

**Find Folder**

Folder Type

AR - Customer PO # Folder

Keywords

PO #

Customer Name

Find

Results

Close

3. From the **Folder Type** drop-down select list, select a Folder Type. The **Find Folder** pane displays any Keyword Types assigned to the selected Folder Type.
4. 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.

---

**Note:** You can use all Keyword functionality when searching folders, 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.

---

- Click **Find** or press **Enter** to find all folders matching the criteria. Folders are displayed in the **Results** list:

**Find Folder**

Folder Type  
AR - Customer PO # Folder

Keywords

PO # 213\*

Customer Name

Find

Results

Folder Name
PO # 2132
PO # 2135

Close

If only one folder is returned, that folder is opened and displayed in the **Folder Tree** 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.

---

- 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.

7. If desired, click **Clear Keywords** to clear all entered values and start a new folder search.



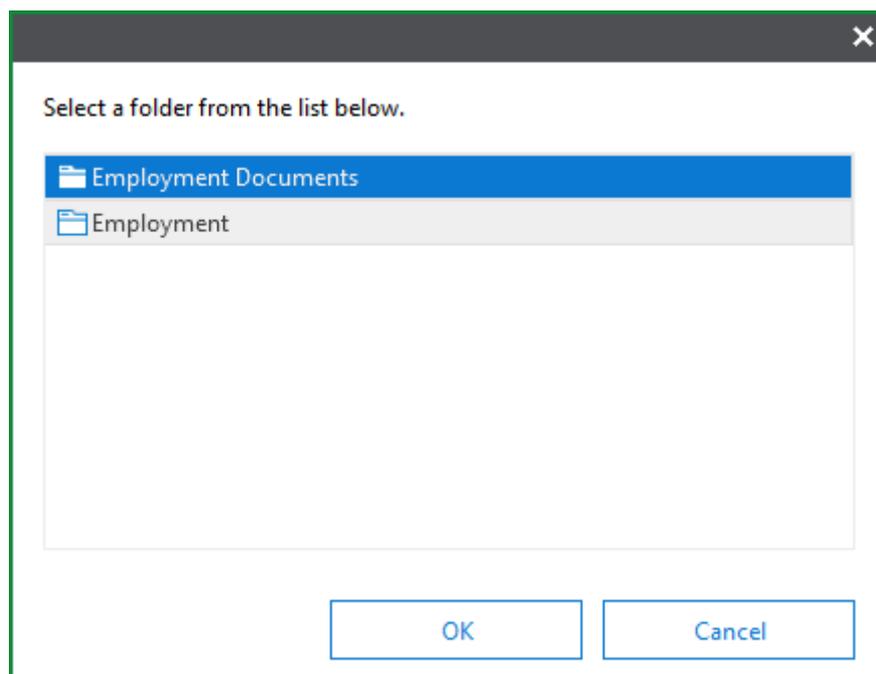
8. Click **Close** to close the **Find Folder** pane.

## 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**.

- If the document resides in only one folder, then the folder is opened in the File Cabinets layout.
- If the document resides in multiple folders, then the folders are listed in the following dialog box. To open a folder, either double-click it, or select it and click **OK**.



- If no container folders can be found, then **No documents found** is displayed.

## 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.

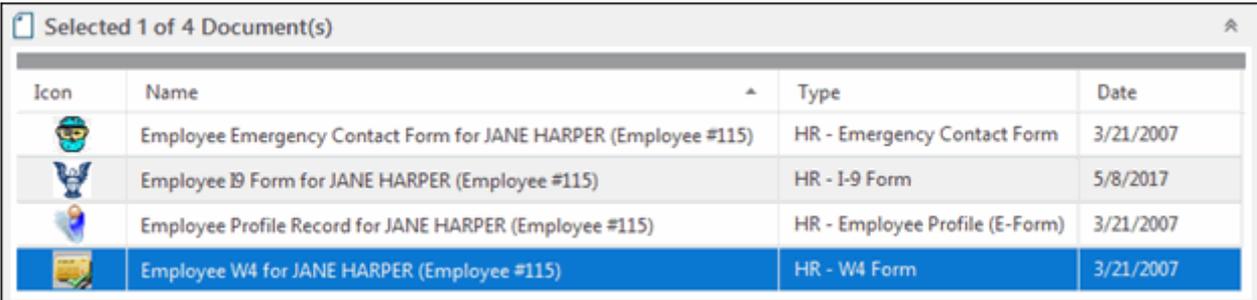
- If one value is left blank on the document, but not on the folder, the command returns the folder, even though the document doesn't reside in it.
- If one value is left blank on the folder, but not on the document, the command does not return the folder, even though the document dynamically resides 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.

## Applying Folder Filters

**Note:** Users without rights to certain filters will not see those filters displayed.

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.



Icon	Name	Type	Date
	Employee Emergency Contact Form for JANE HARPER (Employee #115)	HR - Emergency Contact Form	3/21/2007
	Employee I-9 Form for JANE HARPER (Employee #115)	HR - I-9 Form	5/8/2017
	Employee Profile Record for JANE HARPER (Employee #115)	HR - Employee Profile (E-Form)	3/21/2007
	Employee W4 for JANE HARPER (Employee #115)	HR - W4 Form	3/21/2007

Filters are similar to another function of folders called folder templates. 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, click the **Filter** button in the **Folder Ribbon**. The applied filter has a check mark next to its name. To remove the filter, select **<No Filter>**. Removing the filter may be necessary to display all the documents in a folder. To apply a folder filter:

1. With the **Folder** tab selected, click the **Filter** button from the **Folder** ribbon.



---

**Note:** The **Filter** button is only available if you have configured Folder Filters.

---

2. Select a filter.
3. If a form is displayed in a separate window, type the Keyword Values to filter the folder by, and submit the form.

---

**Note:** The maximum number of documents that can be returned in a folder filter query is 2,000.

---

4. 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.

## 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 is supposed to 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. With the **Folder** tab selected, click the **Template** button from the **Folder** ribbon.



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. Contents are displayed according to the configured Document Type order of the folder.

---

**Note:** Depending on the template configuration, all contents of the folder may be displayed when a template is applied. If this is the case, template documents are displayed first, followed by documents that do not meet the template criteria.

---

The **Documents** pane displays any applicable documents or information.

---

**Note:** 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.

---

## Adding, Uploading, and Removing Documents

The following topics describe how documents are added to, uploaded to, and removed from folders.

- [Adding Documents to Dynamic Folders on page 229](#)
- [Adding Documents to Static Folders on page 230](#)
- [Uploading and Indexing Documents Using Folders on page 230](#)
- [Removing Documents from Folders on page 232](#)

### Adding Documents to Dynamic Folders

You cannot add a document to a dynamic folder by dragging the document. 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 a static folder by dragging the documents to the **File Cabinets** layout. A single document can reside in multiple folders, because folders contain pointers to documents rather than actual copies.

1. Ensure that the **File Cabinets** layout is open in a separate window.
2. From an open document or from a list with one or more documents selected, press and hold the left mouse button to hook the document(s).
3. Drag the document(s) to the **Folder Tree** or **Documents** pane and release the mouse button. The **Documents** pane displays the added document(s).

---

**Note:** You may not be able to manually add documents to all folders. You cannot manually add documents to dynamic folders because their contents are dynamically determined based on Keyword Values. See your system administrator if you have questions about static and dynamic Folder Types.

---

If OnBase will not 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

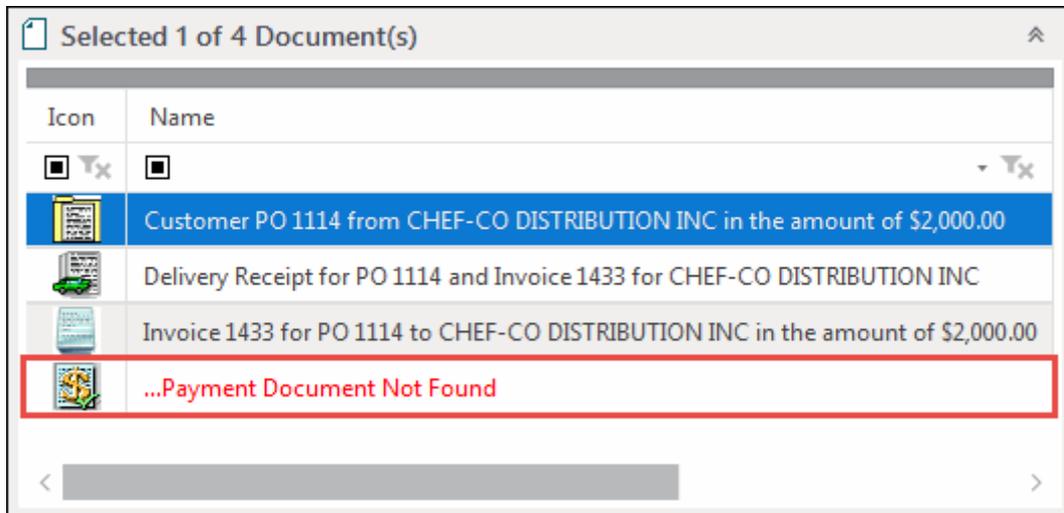
You may be unable to add a document to a folder under any of the following conditions:

- 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.

## Uploading and Indexing Documents Using Folders

Depending on your privileges, you can upload documents to OnBase using existing dynamic or static folders. When you upload a document to OnBase using a folder, the document is added to the folder.

Uploading a document to OnBase using a folder can be useful, for instance, when a template is applied to a dynamic folder and one or more placeholders are displayed for documents that have not yet been added to the folder. If the document exists and resides outside of OnBase, you can simultaneously upload it to OnBase and add it to the folder using the folder's indexing information.



To upload a document to OnBase using a folder:

1. Open the appropriate folder.
2. Right-click the folder and select **Keywords** to check the Keyword Values assigned to the folder. Enter Keyword Values for the folder, if necessary.
3. Ensure the correct folder is selected in the **Folder Tree** pane.
4. Do one of the following:
  - Select a file to upload from outside of OnBase. This includes Outlook emails or email attachments. Drag and drop the file to the folder in the **Folder Tree** pane or to the **Documents** pane.
  - Right-click within the **Documents** pane.

---

**Tip:** When uploading to a dynamic folder, select and right-click the document or template placeholder in the **Documents** pane that represents the Document Type of the document you would like to upload. That Document Type is then automatically selected when the **Import** layout is displayed.

---

Select **Import**.

5. The **Import** layout is displayed.

6. Select the appropriate Document Type and any other selections.
  - If the folder is dynamic, only Document Types assigned to the Folder Type are available.
  - If no Document Types are available, then you do not have privileges to any Document Type assigned to this Folder Type. In this situation, you cannot upload the document into OnBase.

---

**Note:** For more information on uploading documents, see [Importing Documents on page 281](#).

---

7. Any Keyword Types shared with the folder are populated with the folder's corresponding Keyword Values.

If the folder contains the Primary Keyword Value of an AutoFill Keyword Set that is assigned to the Document Type, its Secondary Keyword Values are not populated until you press the **Tab** key from within the Primary Keyword Type field.
8. Click **Import**. The document is uploaded to OnBase and added to the folder.

---

**Note:** To drag and drop multiple files into the Import queue, you must be licensed for EDM Services. Files dragged and dropped in this manner will be queued in the **Import** layout in the order in which they were selected in Windows Explorer. This order is influenced by which file you click and hold to drag the group of files. For example, if files 1, 2, 3, 4, and 5 were selected in Windows Explorer and you clicked on file 3 to drag them into the **Import** layout, the files would be organized in the Import queue as follows: 3, 4, 5, 1, 2.

---

## Removing Documents from Folders

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

---

**Note:** You cannot remove a Certificate of Destruction from a folder. For more information on Certificates of Destruction, see the Records Management module reference guide.

---

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. You also cannot manually remove documents that reside dynamically in a folder that is both static and dynamic.

## Adding and Deleting Folders

These topics describe how to add and delete folders:

- [Adding a Folder on page 233](#)
- [Deleting a Folder on page 234](#)

---

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

---

## Adding a Folder

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** pane is displayed:

**Create New Folder**

Folder Type  
AR - Customer Folder

Folder Date 04/26/2017

**Keywords**

Customer #

Customer Name

Save Cancel

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)If no folders are available for you to create, then the message **No folder types available** is displayed under the drop-down.
4. Index the new folder.
  - 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, you can add another instance of the Keyword Type Group by double-clicking the Keyword Type Group's name.
5. Change the **Folder Date** if desired.
  6. Click **Create**. 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 **Browse Folders and File Cabinets** layout:

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

The screenshot shows a dialog box titled "Folder Keywords" with a red close button in the top right corner. The dialog contains the following information:

- Folder Type:** AR - Customer PO # Folder
- Folder:** PO # 1114
- Folder Date:** 03/07/2008 (displayed in a dropdown menu)
- Keywords:** PO # 1114, Customer Name CHEF-CO DISTRIBUTION INC

At the bottom of the dialog is a "Save Keywords" button. Below the dialog, there is a blue key icon and a document icon.

- Depending on your system configuration, one or more of the 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, you can add another instance of the Keyword Type Group by double-clicking the Keyword Type Group's 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 153.

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

## Modifying Keyword Values on a Folder, Child Folders, and Documents

Throughout a business process, the Keyword Values associated with a folder or folder tree may change. To modify Keyword Values on all folders and documents in a folder tree, use the **Folder Contents | Keywords** right-click options.

You can modify only one Keyword Value at a time, which prevents folder contents from inheriting values for all of the folder's Keyword Types. If the folder uses Multi-Instance Keyword Type Groups, all values in a group can be modified simultaneously. For information about modifying Keyword Values in Multi-Instance Keyword Type Groups, see page 238.

---

**Note:** As a best practice, use the **Folder Contents | Keywords** options only when the folder and its contents use the same Keyword Types.

---

If you have insufficient privileges to modify Keyword Values on all of a folder's contents, values are modified only on child folders or documents you have privileges to modify. If you lack rights to modify Keyword Values on a folder, then no values are modified on the folder's contents.

To modify Keyword Values on a folder and its contents,

1. From the **Folders** layout, select the folder whose Keyword Values you want to modify.
2. Right-click and select one of the following options from the **Folder Contents | Keywords** menu:

Option	Description
<b>Folders and Documents</b>	Modifies the Keyword Values on the selected folder and any documents residing directly within that folder. Keyword Values on the folder's child folders and their documents are not modified.
<b>Folders and Child Folders</b>	Modifies the Keyword Values on the selected folder and its child folders. Keyword Values on documents residing within the folder or its child folders are not modified.
<b>Folders, Child Folders, and Documents</b>	Modifies the Keyword Values on the selected folder, its child folders, and any documents residing within the folder or its child folders.

The **Modify Folder Keywords** dialog box is displayed:

The screenshot shows a dialog box titled "Modify Folder Keywords" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Folder Type:** AR - Customer PO # Folder
- Folder:** PO # 1114
- Keyword Type:** A dropdown menu currently showing "PO #".
- Keywords:** A section with a green upward-pointing arrow icon and the text "Keywords". Below it is a text input field containing "1114".
- Buttons:** Three buttons at the bottom: "Save", "Apply", and "Cancel".

3. Select the Keyword Type to modify from the **Keyword Type** drop-down select list. If the Keyword Type is in a Multi-Instance Keyword Type Group, you can modify values on all Keyword Types in the group.

---

**Caution:** Ensure you understand how modifying Multi-Instance Keyword Type Groups will affect Keyword values on folder contents. For more information, see [Modifying Multi-Instance Keyword Type Groups on page 238](#).

---

4. Type the new value for the folder and the contents you selected in step 2. The selected contents will have the same number of instances of the Keyword Type and the same values for each instance.
  - If you add another instance of the Keyword Type (by pressing F6), the new instance and its Keyword Value is added to the folder and selected contents. If you remove an instance of a Keyword Value, the Keyword Value is removed from the folder and selected contents.
  - If the selected Keyword Type is part of a Cascading Data Set, changing the Keyword Value will not update the child values that depend on it. For example, if you change the **State** value, then the **City** Keyword Type will retain its current value on the folder and its contents. Be sure to update any child values on folders and documents as needed.
5. Do one of the following:
  - Click **Save** to save the modified Keyword Values and close the **Modify Folder Keywords** dialog box.
  - Click **Apply** to save the modified Keyword Values and keep the **Modify Folder Keywords** dialog box open to modify additional Keyword Values.
  - Click **Cancel** to cancel any changes that have not been applied.

## Modifying Multi-Instance Keyword Type Groups

If the folder or its contents use a Multi-Instance Keyword Type Group, ensure you understand how Multi-Instance Keyword Type Groups are affected before using the **Folder Contents | Keywords** options.

The following examples describe how the **Folder Contents | Keywords** options are applied when folders or contents use Multi-Instance Keyword Type Groups. The tables display examples of folder and content Keyword Values before and after the Keyword Values are modified. These examples use **ID** and **Color** as Keyword Types.

**Example 1: Content uses the same Multi-Instance Keyword Type Group as its folder**

When modifying a Keyword Value in a Multi-Instance Keyword Type Group used by a folder and its content, the Keyword Values on the folder are duplicated exactly on the content. The content inherits the same number of instances and the same values for the Multi-Instance Keyword Type Group as on the folder. Below, the values of the keywords ID and Color used by the folder are modified, so the values of the keywords ID and Color used by the content are modified.

	Folder Keywords	Content Keywords
<b>Before Modification</b>	ID: <b>111</b> Color: <b>Red</b>	ID: <b>222</b> Color: <b>Blue</b>
<b>After Modification</b>	ID: <b>444</b> Color: <b>Green</b>	ID: <b>444</b> Color: <b>Green</b>

---

**Caution:** When a folder has fewer instances of a Multi-Instance Keyword Type Group than its content, the content is modified to only use the instances of the Multi-Instance Keyword Type Group used by the folder.

---

Below, the values of the keywords ID and Color used by the folder are modified, so the instances of the keywords ID and Color used by the content are replaced by the instance of the keywords ID and Color used by the folder.

	Folder Keywords	Content Keywords
<b>Before Modification</b>	ID: <b>111</b> Color: <b>Red</b>	ID: <b>222</b> Color: <b>Blue</b>
		ID: <b>333</b> Color: <b>Yellow</b>
<b>After Modification</b>	ID: <b>444</b> Color: <b>Green</b>	ID: <b>444</b> Color: <b>Green</b>

**Example 2: Content uses a Multi-Instance Keyword Type Group that contains a Keyword Type used by its folder**

When modifying a Keyword Value used by the folder that is in a Multi-Instance Keyword Type Group used by the content, each instance of that Keyword Value in the Multi-Instance Keyword Type Group used by the content is modified. Below, the value of the keyword ID used by the folder is modified, so the value of each instance of the keyword ID used by the content is also modified.

	Folder Keywords	Content Keywords
<b>Before Modification</b>	ID: <b>111</b>	ID: <b>222</b> Color: <b>Blue</b>
		ID: <b>333</b> Color: <b>Yellow</b>
<b>After Modification</b>	ID: <b>444</b>	ID: <b>444</b> Color: <b>Blue</b>
		ID: <b>444</b> Color: <b>Yellow</b>

**Example 3: Content uses a Keyword Type that is contained in a Multi-Instance Keyword Type Group used by its folder**

When modifying a Keyword Value in a Multi-Instance Keyword Type Group used by the folder, the Keyword Value used by the content is not modified. Below, the value of the keyword ID in the Multi-Instance Keyword Type Group used by the folder is modified, but the value of the keyword ID used by the content is not modified.

	Folder Keywords	Content Keywords
<b>Before Modification</b>	ID: <b>111</b> Color: <b>Red</b>	ID: <b>222</b>
<b>After Modification</b>	ID: <b>444</b> Color: <b>Green</b>	ID: <b>222</b>

## Working with Folder Notes

Folder notes help you efficiently navigate folders and find specific information about their contents. Like notes on paper folders, folder notes in OnBase can provide additional information about a folder's contents, or they can act as bookmarks to let you quickly find a document. Different note colors can help you find important or related notes. By providing the information you need at a glance, folder notes can save you time otherwise spent searching through every document in a folder.

For example, suppose you have case file that contains multiple subfolders. In OnBase, the case file folders can be set up as containers for folder notes, allowing you to comment on and add bookmarks to any document in any folder in the case file. Other users with permissions to view these notes can immediately see them upon opening the case file.

Before you begin, read the following topic, [Folder Notes Requirements](#). Then, proceed to the following topics:

- [Viewing and Sorting Folder Notes and Bookmarks on page 242](#)
- [Adding a Folder Note or Bookmark on page 243](#)
- [Viewing a Bookmarked Document on page 245](#)
- [Editing an Existing Note or Bookmark on page 246](#)
- [Deleting a Note or Bookmark on page 247](#)

### Folder Notes Requirements

Not all folders allow notes. To allow notes, a folder must either:

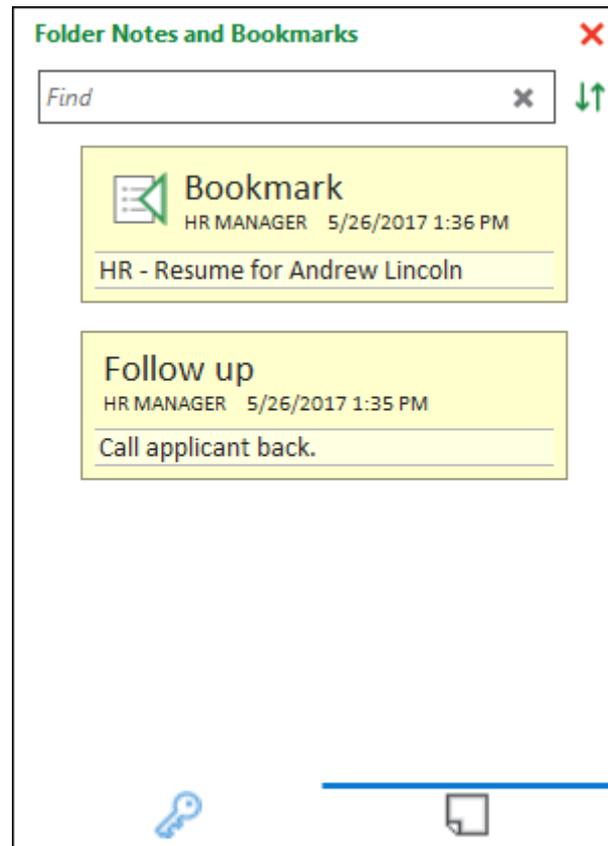
- Be based on a Folder Type configured as a parent for folder notes. These parent folders define the branch of the folder tree where notes are allowed.
- Reside within a parent folder for folder notes.

To work with folder notes, you must have sufficient privileges. If you do not have Folder Note Type privileges, then you cannot create, view, edit, or remove folder notes.

## Viewing and Sorting Folder Notes and Bookmarks

The following steps describe how to view notes and bookmarks on folders within the current branch of the folder tree. If folder notes are unavailable from the folder you are viewing, ensure the [Folder Notes Requirements on page 241](#) are met.

1. Open the folder containing notes or bookmarks.
2. Click **Notes** from the ribbon's **Folder** tab to display the **Notes and Bookmarks** pane. This pane displays all notes residing on any folder in the current branch of the folder tree.



---

**Note:** Two parent folders for folder notes can exist within the same branch of the folder tree. In this scenario, the higher-level parent folder does not display notes residing on folders within the lower-level parent. The lower-level parent folder acts as an isolated container for the notes residing on it and its child folders. This configuration allows multiple sets of notes to exist within a single folder structure. For information about how your folder solution is configured, contact your system administrator.

---

To search for specific text contained in the folder's notes, enter text in the **Find** field. The **Notes and Bookmarks** pane automatically displays any notes matching your search criteria. To clear search criteria, click the **X** in the **Find** field. Wildcards do not function in this field.

To sort the folder's notes, click the following button:



The following sort options are available:

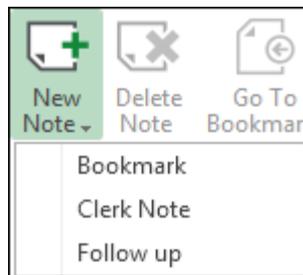
Sort Option	Action When Selected
<b>Created By (Ascending)</b>	The folder's notes are sorted by the name of the user that created the note, in ascending order.
<b>Created By (Descending)</b>	The folder's notes are sorted by the name of the user that created the note, in descending order.
<b>Created Date (Ascending)</b>	The folder's notes are sorted by the date and time that the note was created, in ascending order.
<b>Created Date (Descending)</b>	The folder's notes are sorted by the date and time that the note was created, in descending order.
<b>Modified Date (Ascending)</b>	The folder's notes are sorted by the date and time that the note was last modified, in ascending order.
<b>Modified Date (Descending)</b>	The folder's notes are sorted by the date and time that the note was last modified, in descending order.
<b>Note Type (Ascending)</b>	The folder's notes are sorted by the Note Type, in ascending order.
<b>Note Type (Descending)</b>	The folder's notes are sorted by the Note Type, in descending order.

## Adding a Folder Note or Bookmark

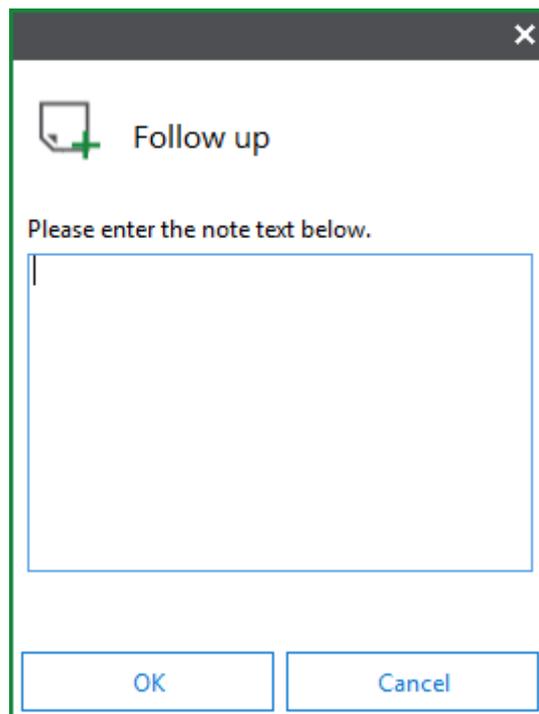
The following steps describe how to add a note or bookmark to the folder you are currently viewing. Notes allow you to comment on folder contents; bookmarks allow you to quickly jump to a specific page on a specific document in the folder tree.

1. Navigate to the folder where you want to add the note.
2. If you are adding a bookmark, navigate to the document and page that you want to bookmark.

- Click **New Note** from the ribbon's **Folder** tab to display available Folder Note Types.



- Select the type of note you want to add. If you are bookmarking a document, select the Note Type set up for bookmarking. The **Add Note** dialog box is displayed.



---

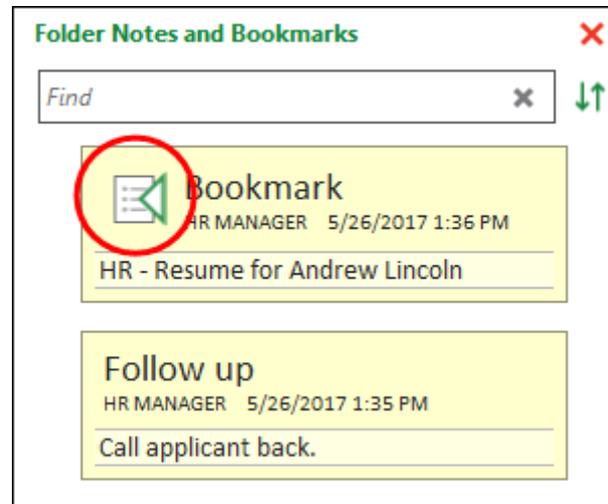
**Note:** If you select a bookmark Note Type, but no document is displayed in the viewer, then you are prompted to create a note without a bookmark. Choose **Yes** to proceed, or choose **No** to cancel note creation.

---

- Type the note text in the field provided.  
When adding a bookmark, the Auto-Name string of the bookmarked document and the page number on which you are placing the bookmark are displayed in the field by default. This text can be removed or edited as needed.
- Click **OK**. The new note is added to the top of the **Notes and Bookmarks** pane. To access this pane, see [Viewing and Sorting Folder Notes and Bookmarks on page 242](#).

## Viewing a Bookmarked Document

To quickly retrieve a bookmarked document, click the **Go to Page** button from the bookmark in the **Notes and Bookmarks** pane. This button is available only on bookmarks; it is not available on standard folder notes.



You can also navigate to a bookmarked document by selecting the bookmark and clicking the **Go To Bookmark** button from the **Folder** ribbon.



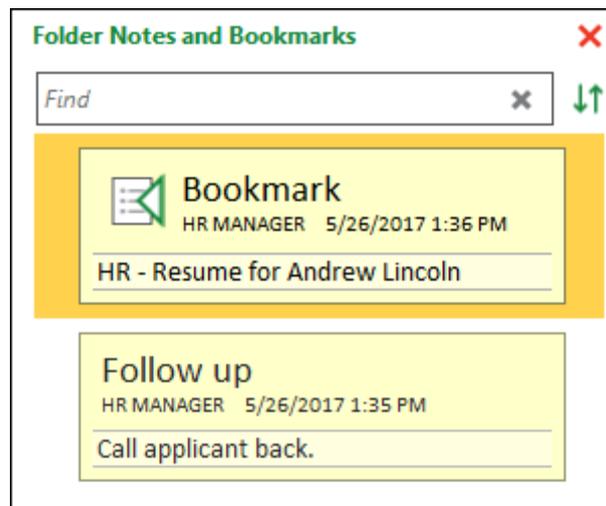
---

**Note:** If an error is displayed, the document may have been removed from the folder or deleted from OnBase, or you may lack privileges to the document.

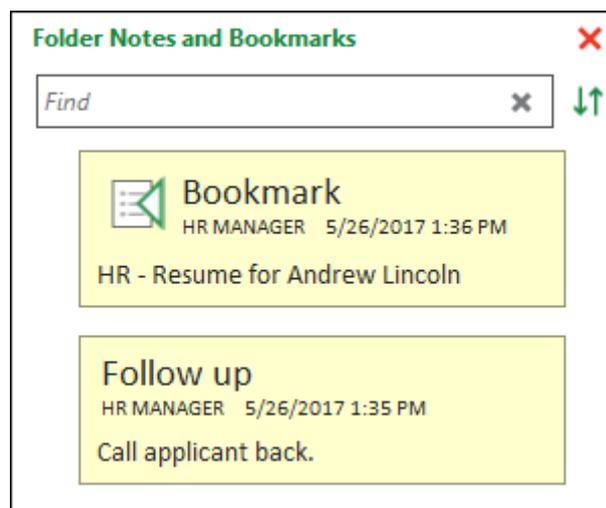
---

## Editing an Existing Note or Bookmark

To edit a note, click in the text field under the note's name and timestamp. Then, type to edit the text as needed. Click on an area outside the note. The note text is saved.



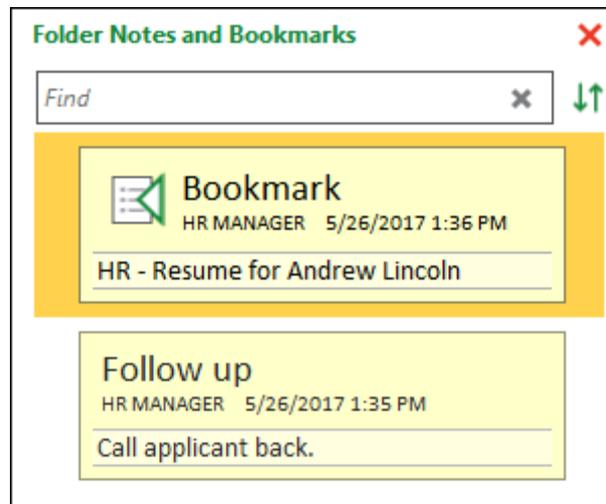
If the text field does not have a border, as shown in the following example, then you lack sufficient privileges to edit the note.



## Deleting a Note or Bookmark

The following steps describe how to delete a note or bookmark from a folder.

1. Select the note in the **Notes and Bookmarks** pane.



2. Do one of the following:
  - Right-click on the note (anywhere except the note's text field), and select **Delete Note**.
  - Click the **Delete Note** button on the **Folder** tab in the ribbon.

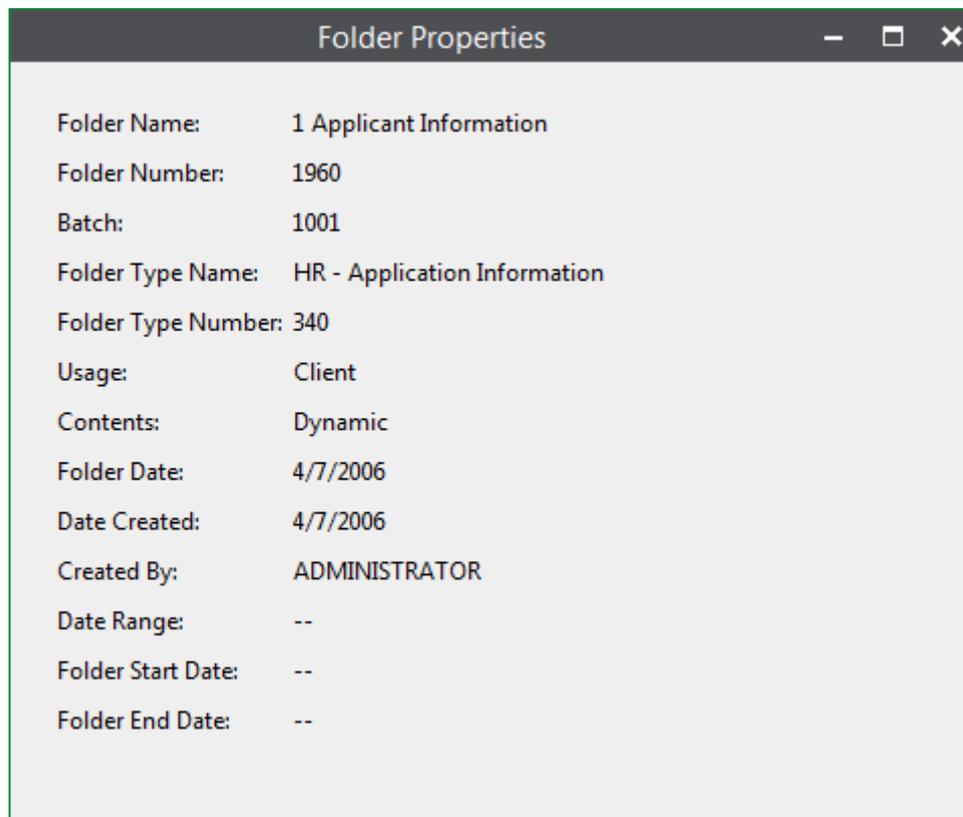


3. Click **Yes** when prompted.

## Folder Properties

The **Folder Properties** window provides information about a selected folder, including its content type, creation date, folder date, date range, and creator. Folder properties are available only to users with sufficient privileges.

1. Select the folder from the File Cabinets layout.
2. Right-click and select **Properties**. The folder's properties are displayed.



Properties are described in the following table. For more information about your folder configuration, contact your system administrator.

Property	Description
<b>Folder Name</b>	The folder's Auto-Name.
<b>Folder Number</b>	The internal number assigned to the folder when it was created.
<b>Batch</b>	The number of the batch that imported the document that created the folder. Batches of documents are imported through OnBase's processing modules, such as COLD/ERM. If the folder was not created through a batch, this number is <b>0</b> .

Property	Description
<b>Folder Type Name</b>	The name of the Folder Type on which the folder is based.
<b>Folder Type Number</b>	The internal number of the Folder Type.
<b>Usage</b>	The usage type of the Folder Type.
<b>Contents</b>	The content type of the Folder Type. The content type determines whether the folder contains documents and how any documents are stored. Possible values include <b>Folders Only</b> , <b>Static</b> , <b>Dynamic</b> , <b>Static/Dynamic</b> , <b>Static/Child Contents</b> , and <b>Dynamic Group</b> . <b>Static/Child Contents</b> is displayed for folders that display the static contents of child folders.
<b>Folder Date</b>	The date assigned to the folder when it was created. The folder date can be modified to suit your business needs.
<b>Date Created</b>	The date the folder was created. This value cannot be modified.
<b>Created By</b>	The name of the user who created the folder or who ran the process that created the folder.
<b>Date Range</b>	The date range assigned to the Folder Type. Possible values include <b>None</b> , <b>Daily</b> , <b>Weekly</b> , <b>Monthly</b> , <b>Quarterly</b> , <b>Biannually</b> , and <b>Yearly</b> .
<b>Folder Start Date</b>	The start date of the folder's date range. This property has no value if the Folder Type has no date range.
<b>Folder End Date</b>	The end date of the folder's date range. This property has no value if the Folder Type has no date range.

---

**Note:** File cabinet properties display only the properties of the file cabinet, not the properties of the folders it contains.

---

## Viewing the History of a Folder

A folder's history provides information about actions that have been performed on the folder.

1. Select the folder from the **File Cabinets** layout.
2. Right-click and select **History**. The **Folder History** window displays actions that have been performed on the folder, including when the action was logged and who performed the action.

---

**Note:** Your User Group must have the **Folder History** product right in order to access Folder History. For additional information, see your system administrator.

---

## 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 and folders. You can read messages from other users from your OnBase inbox. If you need to send documents to non-OnBase users, you can use external mail to send OnBase documents or links to documents to an email address.

- To send documents and messages to another OnBase user, see [Send To | Internal User on page 250](#).
- To check your OnBase inbox, see [Checking Internal Mail on page 255](#).
- To email documents or links to documents externally, see [Emailing Documents and Links to Documents on page 260](#).

### Send To | Internal User

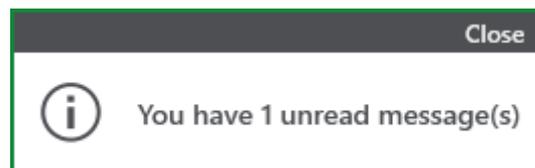
Internal Mail is useful for sending a message to another OnBase user. When you attach documents to an internal email message, the system attaches a pointer to the actual document within OnBase. Because both the email message and attachments are part of OnBase, documents retain all their system attributes (for example, permissions, keywords, etc.). Internal Mail messaging also provides the ability for multiple users to view a particular document.

---

**Note:** You must have the Internal Mail privilege assigned in order to use Internal Mail.

---

Depending on your configuration, you may be notified about new Internal Mail messages when you log on to OnBase, or when a user sends you new mail, by a **You have # unread message(s)** notification:



### Sending OnBase Documents to Other OnBase Users

1. From the Document Search Results list:
  - Select one or more documents and click **Send To | Internal User** on the **Document** tab.
  - Select one or more documents, right-click, and select **Send To | Internal User**.

From an open document:

- Click **Send To | Internal User** on the **Document** tab.

From an open image or text document:

- Click **Send To | Internal User** on the **Document** tab.

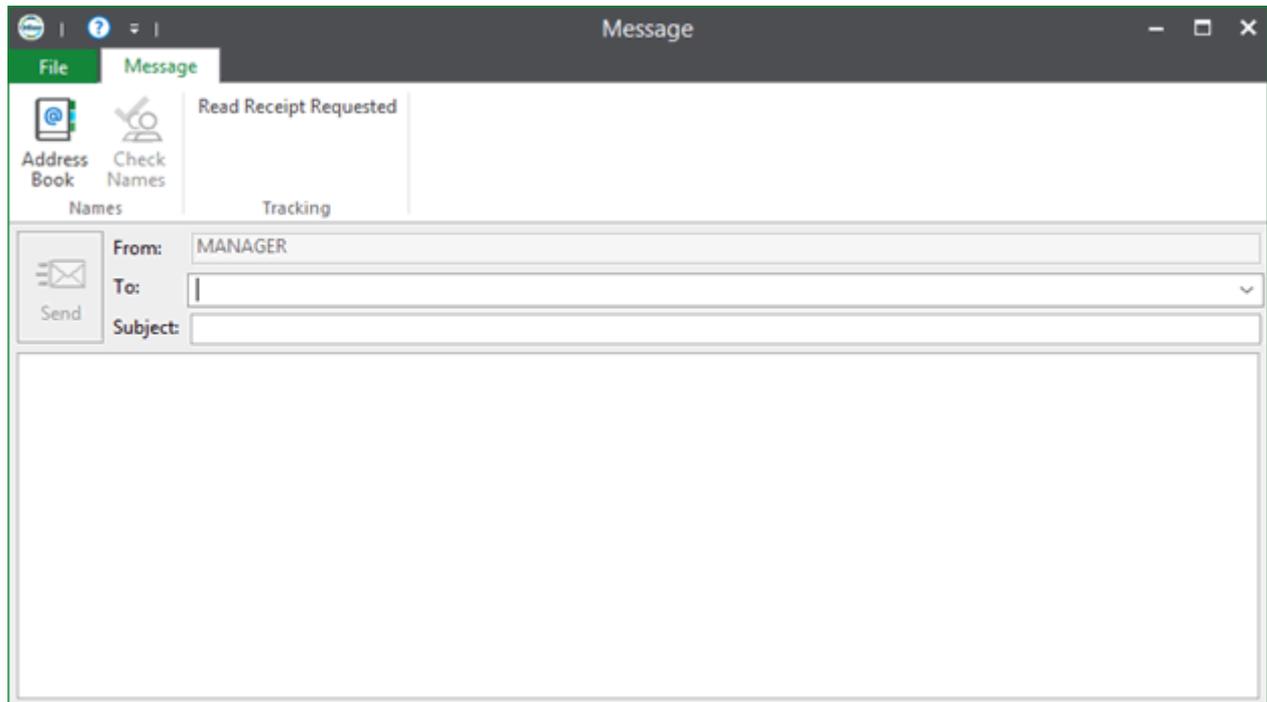
- Right-click and select **Send To | Internal User**.

---

**Note:** You can only send documents that you have rights to send as mail. If you send a document to a user that does not have rights to view the document, the document is not attached to the email that this user receives.

---

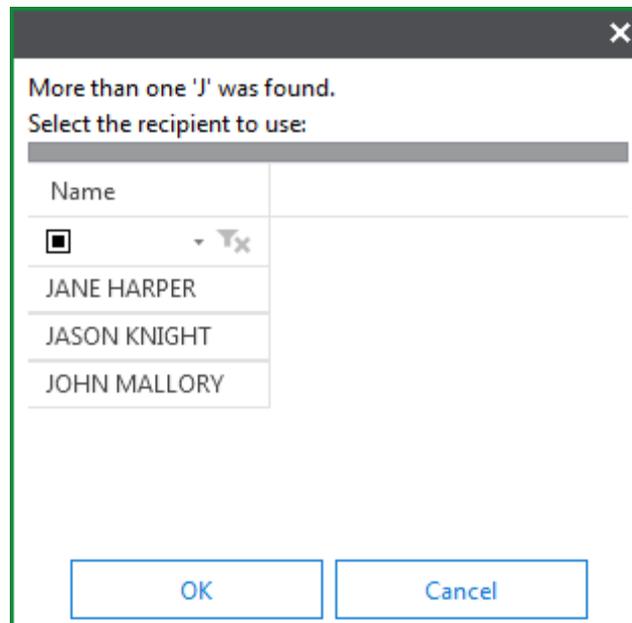
2. A new message is displayed:



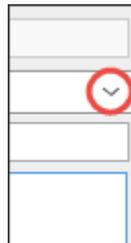
The **Attachments** field displays the attached document(s). Double-click a document to view it directly from the message.

3. You can add recipients manually or from the address book.
4. To add recipients manually:
  - a. Type the name of a user or user group in the **To:** field, separating multiple recipients with a semicolon. Enclose user groups with angle brackets (<>). For example, <User Group>.
  - b. On the **Message** tab, in **Names**, click **Check Names** to check the user or user group names that you have typed.

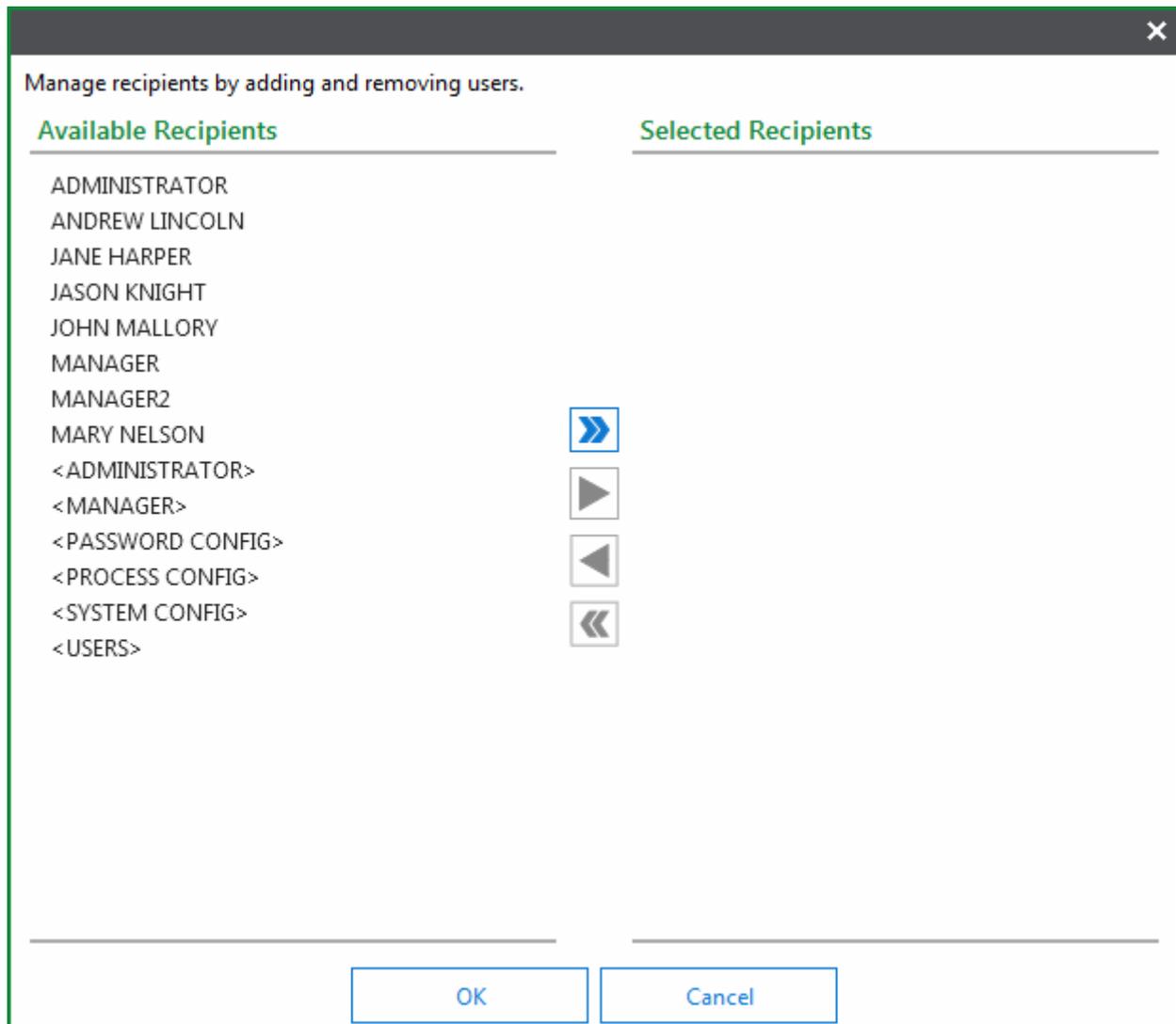
c. If no matches or multiple matches were found, the following screen is displayed:



- d. Select the recipient to use and click **OK**.
5. To add recipients from the address book:
- a. On the **Message** tab, in **Names**, click **Address Book**, or select the **To** drop-down list:



b. The address book is displayed:



Users and user groups are listed in **Available Recipients**. User groups are enclosed with angle brackets (<>).

- c. Select a user or user group, or multiple users/user groups by holding down the **Ctrl** or **Shift** keys while clicking.
- d. Click **Add Selected Items** to add the selected user(s)/user group(s) to the **Selected Recipients** list.



Click **Add All Items** to add all user(s)/user group(s) to the **Selected Recipients** list.



- e. To remove users/user groups from the **Selected Recipients** list, select them from the **Selected Recipients** list and click **Remove Selected Items**.



To remove all users/user groups from the **Selected Recipients** list, click **Remove All Items**.



6. The **To:** field displays the selected user(s)/user group(s):

7. Type a **Subject** of up to 100 characters.
8. On the **Message** tab, in **Tracking**, select **Read Receipt Requested** to request a read receipt.
9. Type a message of up to 250 characters.

---

**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.

---

10. Click **Send**.

## Checking Internal Mail

1. On the **Home** tab, in **Internal Mail**, click **Mailbox**:



2. The **Mailbox** layout is displayed:

Mailbox: 5 Mail Messages			
	From	Subject	Date
<input type="checkbox"/>			
▲ 5/1/2017 12:00 AM (3 items)			
	MANAGER	Offer Letter for MARY NELSON	5/1/2017 1:20 PM
	MANAGER	Performance Review for JASON KNIGHT	5/1/2017 1:16 PM
	MANAGER	Performance Review for ANDREW LINCOLN	5/1/2017 1:16 PM
▲ 4/27/2017 12:00 AM (1 item)			
	MANAGER	Offer Letter	4/27/2017 4:59 PM
▲ 4/21/2017 12:00 AM (1 item)			
	MANAGER		4/21/2017 4:34 PM

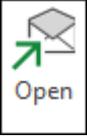
3. Messages are grouped based on the date they were received:

Group	Description
<b>Today</b>	These messages were received today.
<b>Yesterday</b>	These messages were received yesterday.
<b>Earlier This Month</b>	These messages were received earlier in the month.
<b>Last Month</b>	These messages were received last month.
<b>Older</b>	These messages were received prior to last month.

4. The following columns display message properties:

Column	Description
<b>Icon</b>	<p>Displays whether the message has been read. Messages that have not been read are denoted by the following icon:</p> <p style="text-align: center;"></p> <p>Messages that have been read are denoted by the following icon:</p> <p style="text-align: center;"></p> <p>Messages that have not been read and have an attachment are denoted by the following icon:</p> <p style="text-align: center;"></p> <p>Messages that have been read and have an attachment are denoted by the following icon:</p> <p style="text-align: center;"></p>
<b>From</b>	Displays the OnBase user that sent the message.
<b>Subject</b>	Displays the message subject.
<b>Date</b>	Displays the date the message was sent.

5. The following buttons are available on the **Mailbox** tab and the **Mailbox** layout's right-click menu:

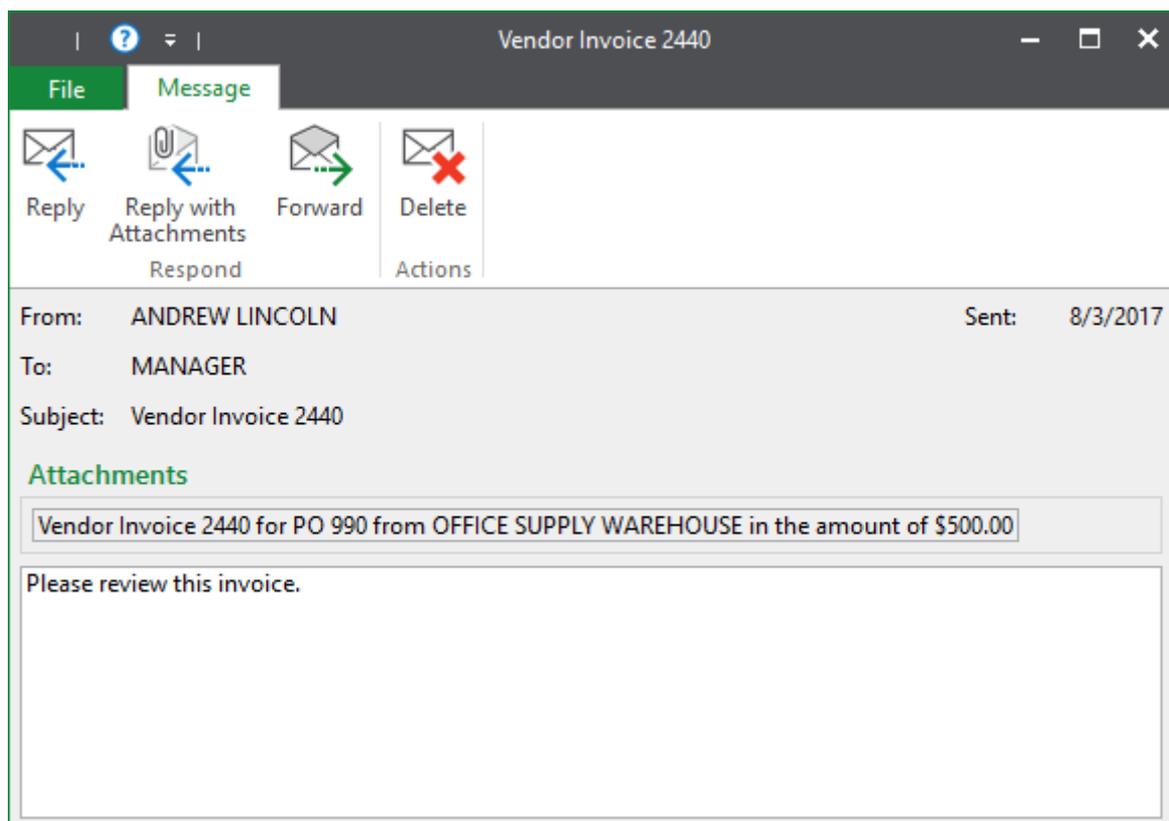
Actions	Description
 Open	<b>Open</b> opens the selected message. You can also double-click a message to open it. See <a href="#">Viewing Internal Mail on page 258</a> for more information.
 New	<b>New</b> creates a new message.
 Delete	<b>Delete</b> deletes the selected message(s). Click <b>Yes</b> to confirm that you want to delete the message.

Respond	Description
 Reply	<b>Reply</b> lets you reply to the OnBase user who sent you the selected message.
 Reply with Attachments	<b>Reply with Attachments</b> lets you reply to the OnBase user who sent you the selected message while retaining any attachments.
 Forward	<b>Forward</b> lets you forward the selected message and attachment(s) to other OnBase users.

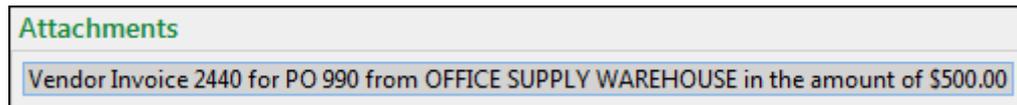
Options	Description
 <p>Mark as Read</p>	<p><b>Mark as Read</b> marks the selected message as read</p>
 <p>Refresh Messages</p>	<p><b>Refresh Messages</b> refreshes the list of messages.</p>

## Viewing Internal Mail

Internal mail messages are displayed in a separate window:



To view an attached document, click the document's Auto-Name string in the **Attachments** field:



Attachments are displayed in a separate window.

The following buttons are available on the **Message** tab:

Respond	Description
 Reply	<b>Reply</b> lets you reply to the OnBase user who sent you the message.
 Reply with Attachments	<b>Reply with Attachments</b> lets you reply to the OnBase user who sent you the message while retaining any attachments.
 Forward	<b>Forward</b> lets you forward the message and attachment(s) to other OnBase users.

Actions	Description
 Delete	<b>Delete</b> deletes the message. Click <b>Yes</b> to confirm that you want to delete the message.

## Emailing Documents and Links to Documents

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**Note:** Emailing a document or a link to a document requires that you have a functional Microsoft Outlook, IBM Notes, or Novell GroupWise email client or Gmail account. You cannot email documents or links to documents in the Unity Client with any other email client.

---

**Note:** If using Microsoft Outlook as your email client, Outlook must be running as the same account type as the Unity Client. For example, if Outlook is running in administrator mode (accessed by right-clicking the executable file and selecting **Run as administrator**), the Unity Client must also be running in administrator mode.

---

**Note:** When Microsoft Outlook and Novell GroupWise are installed on the same machine, using GroupWise as the Default Mail Client for the Unity Client may result in unexpected behavior and is not supported.

---

Single documents, a list of multiple documents, folders, Custom Query results, E-Form and Unity Form Creation pages can all be sent as Unity Pop links or Unity Pop Files. Unity Pop Links and Unity Pop Files are available, depending on your configuration, as **Mail Recipient (as Link)**. If you are configured to use DocPop, clicking **Mail Recipient (as Link)** will allow you to send a single document or a list of multiple documents.

You must have user rights to email a document or a link to a document. User rights are managed by your system administrator.

Certain special characters are not supported in file names. If these characters appear in the document's Auto-Name string, they are replaced with a space or substituted with other characters that are supported. The following special characters are replaced with a space: @ # \$ % ^ & = { } [ ] : " ; ' < >. Character substitutions are as follows:

Auto-Name Character	Substitution
*	+
?	!
/	-
\	-
	!

To email a document:

- From the Document Search Results list:
  - Select one or more documents and click **Send To** on the **Document** tab.

- Select one or more documents, right-click, and select **Send To**.
- From an open image or text document:
- Click **Send To** on the **Document** tab.
  - Right-click and select **Send To**.
2. Select **Mail Recipient (as Attachment)** to email the document(s) as an attachment.  
Select **Mail Recipient (as Link)** to email a link to the document(s).

3. If you selected **Mail Recipient (as Link)**, OnBase displays a blank email message containing a link to each selected document.

If OnBase has been configured to use DocPop or Unity Pop URI links, a single link to all documents is generated. A hit list of all documents selected will be opened when the link is clicked. Proceed to step 11.

If you selected **Mail Recipient (as Attachment)**, and the document is not an image or text document, you may be prompted to select an email template in the **Send to Mail** pane. If the **Email Template** drop-down list is displayed, proceed to step 6. If the **Email Template** drop-down list is not displayed, proceed to step 10.

If you selected **Mail Recipient (as Attachment)**, and the document is an image or text document, or you selected multiple documents including an image or text document, the **Send to Mail** pane is displayed:

**Send to Mail**



Send

**Document 1 of 1:**  
 Packing Slip for PO 662 from  
 PHONE SHACK

**File Format of Attachment** ⓘ


v

Default/TIFF Format  
 Send file using the default file format

**Settings**


v

Send All Pages  
 Send the entire document

Pages: ⓘ


v

Email Template  
 None


v

Note Options  
 None

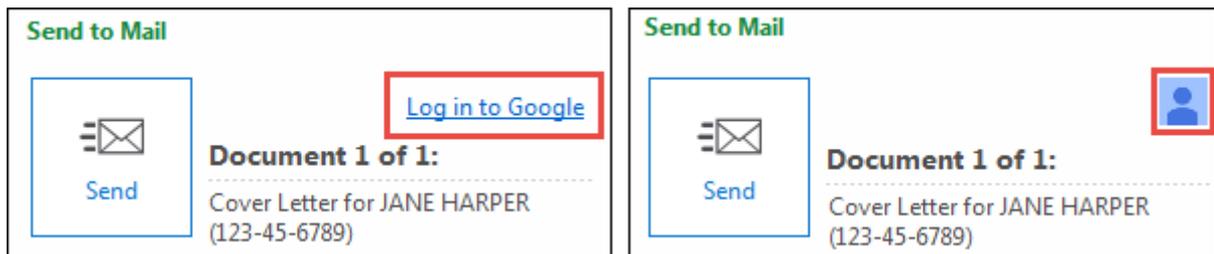
Close

---

**Note:** If you selected multiple documents, including documents that are not image or text documents, the documents will automatically be sent in their native format. Depending on your configuration, you may be able to select an email template in the **Send to Mail** pane. If the **Email Template** drop-down list is displayed, proceed to step 6. If the **Email Template** drop-down list is not displayed, proceed to step 10.

---

If you are using Gmail as your external mail client, the Send to Mail pane may prompt you to log into Google or, if you are already logged in, will display a profile icon.



---

**Tip:** Hover over the profile icon to see which Google user is logged in.

---

**Note:** If a Google account is already logged in and you would like to switch users, you can click the profile icon and select **Log out from Google** to log the Google account out of OnBase. You will also need to log out of Google from your web browser to log out fully.

---

4. Select one of the following from the **File Format of Attachment** drop-down select list:

File Format of Attachment	Description
<b>Default/TIFF Format</b>	Sends the document as a TIFF file. Available for documents with any of the following file formats: <ul style="list-style-type: none"> <li>• Image file format</li> <li>• PCL</li> <li>• PCL with overlay</li> <li>• Text report format</li> <li>• Text report format with overlay</li> </ul>
<b>Unencrypted PDF</b>	Sends the document as a PDF file. Available for documents with any of the following file formats: <ul style="list-style-type: none"> <li>• Image file format</li> <li>• PCL</li> <li>• PCL with overlay</li> <li>• Text report format</li> <li>• Text report format with overlay</li> </ul>
<b>Native Format</b>	Sends the document in the format in which it is stored in OnBase (e.g., OLE documents such as Word documents and PDFs, uncompressed text documents, most image documents). Overlays are not applied. <hr/> <b>Note:</b> This Content Type is only available if the selected documents can be successfully mailed in their native format. <hr/> <b>Note:</b> This option is unavailable for multi-page image documents. <hr/>
<b>Text Format</b>	Saves the document as a .txt file. Available for documents with compressed text file formats. This includes documents imported with COLD or documents with the with the .ctx file type.

If you are sending an encrypted PDF, you are required to type an encryption password in the **Password** field, which is displayed below the **File Format of Attachment** field in the **Send to Mail** pane. This password is case-sensitive and can include alphanumeric or special characters. It cannot contain Unicode characters.

---

**Caution:** If you lose or forget the encryption password, it cannot be recovered.

---

5. Select one of the following from the **Settings** drop-down select list:

Settings	Description
<b>Send All Pages</b>	All pages in the selected document will be sent.
<b>Send Custom Range</b>	The page(s) specified in the <b>Pages</b> field will be sent. Enter page numbers and/or page ranges, separated by commas. For example: 1,3,5-12. <hr/> <b>Note:</b> This option is unavailable when <b>File Format of Attachment</b> is set to <b>Native Format</b> . <hr/>

6. Depending on your configuration, the **Email Template** drop-down list may be displayed in the **Send to Mail** pane. The template you select will change the default text in the subject and body of your email message.

---

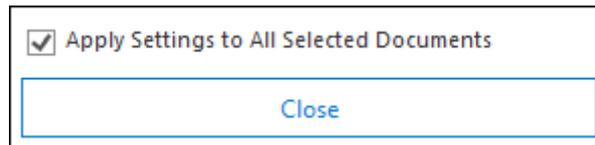
**Note:** If the template you select contains a Keyword Type that does not exist on the document, that Keyword Value is replaced with a blank space.

---

7. If you are sending a document containing notes or annotations, the **Note Options** drop-down list is available. Select either of the following:

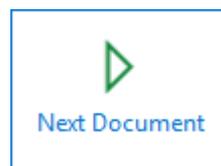
Option	Description
<b>Annotation and/or Note Icon On Document</b>	The document is emailed with any annotations and note icons displayed on the document. If you move a note before emailing the document, the note is displayed in its last saved location. Note locations are saved when a document is closed.
<b>Note Text On Document</b>	The document is emailed with the title and text of any notes in that note's location on the document, along with the name of the user that created the note and the date and time it was created. If this option is selected with <b>Annotation and/or Note Icon On Document</b> , the text is displayed below the icon. If you move a note before emailing the document, the note is displayed in its last saved location. Note locations are saved when a document is closed.

- When sending multiple image or text documents, the **Apply Settings to Subsequent Documents** check box is available:



When it is selected, the **File Format of Attachment** selection is applied to all subsequent documents. The **Settings** drop-down list and **Pages** field are not available. The **Note Options** drop-down list is only available if the first selected document contains notes.

When it is not selected, you are required to repeats steps 4 through 7 for each document. Navigate through the documents using the **Next Document** button:



---

**Note:** You are only able to select an email template for the first document.

---

- Click **Send**:



---

**Note:** If Gmail is configured as your external mail client, you may be prompted to accept **Unity Client Checkout Account Permissions** after clicking Send.

---

- OnBase displays an email message with the selected document(s)/page(s) attached. If you selected an email template in step 6, the email message includes text from that template. If you did not select an email template, the email message is blank.

Depending on your system's configuration, the file name for the attachment may be based on the document's Auto-Name string, or it may be an automatically generated attachment ID.

If an attachment's name is not unique, for example, because you are sending two files with the same Auto-Name string, then OnBase makes the name unique by appending \_ (underscore) followed by a number.

---

**Note:** If you are sending multiple OnBase documents or Unity Pop files with IBM Notes, a ZIP file containing all documents or files is attached to the email message.

---

- Enter the recipient(s) of the message.

12. Type the body of the message.
13. 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.

If you are sending an XML document, the XML stylesheet is applied to the document and it will be converted to HTML.

If you are sending an E-Form, the E-Form is sent as HTML.

If you are sending a Lotus Notes document with a stylesheet, the stylesheet is applied to the document and it will be converted to HTML. Lotus Notes documents without configured stylesheets are sent in their native format.

## Sending Folders as Unity Pop Links and Unity Pop Files

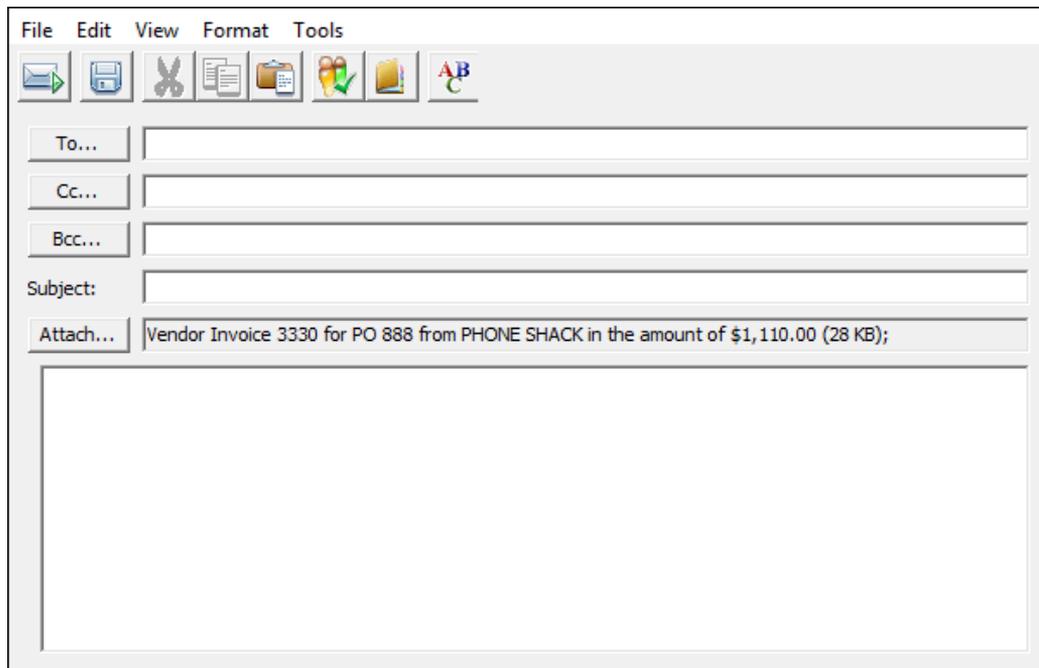
In addition to documents, folders may also be sent to users by clicking **Send To | Mail Recipient (as Link)** if OnBase is configured to use Unity Pop Links or Unity Pop Files.

Recipients of the sent folder must have the user group privilege to view the File Cabinet and must also have permission to view the Folder Type.

## Using the OnBase Mail Message Dialog Box

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

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



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

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

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

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

Button	Description
	<b>Send</b> - Click to send the mail message. This feature is also available by selecting <b>File   Send</b> .
	<b>Save</b> - Click to save the mail message. This feature is also available by selecting <b>File   Save</b> .
	<b>Cut</b> - Click to cut highlighted text in the message field. This feature is also available by selecting <b>Edit   Cut</b> .

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

## Checking Names and Addresses

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

---

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

---

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

## Viewing Unity Pop Files and Links

The Unity Client must be installed on workstations in order to view Unity Pop files and links. The installed instance of the Unity Client must be running in **Service Mode** to view Unity Pop files and Unity Pop links. If Unity Pop links or Unity Pop files are to be viewed, you will need the **Unity Pop Automation** Service Mode feature enabled. Contact your system administrator for more information.

---

**Note:** For more information on Email Templates, contact your system administrator.

---

Depending on your configuration, email messages that you create by selecting **Send To | Mail Recipient (as Link)** may contain either Unity Pop files or Unity Pop URI links.

Unity Pop files are XML files that are references to content in OnBase. When a Unity Pop file is opened, the Unity Client is launched in order to display the content of the Unity Pop file.

Unity Pop URI links are links to content within OnBase. When a Unity Pop link is clicked, the Unity Client is launched in order to display the content of the Unity Pop link.

With both Unity Pop files and Unity Pop links, multiple documents may be sent at once. When a link or file to multiple documents is clicked, a hit list containing all linked documents is opened.

Folders can also be sent by both Unity Pop methods. When a link or a file to a folder is clicked, the folder is opened in the File Cabinet layout.

E-Forms and Unity Forms may also be sent as Unity Pop files and Unity Pop links. When the file or link is opened, the form creation page is opened. For more information on sending and receiving Unity Pop files and Unity Pop links containing E-Forms and Unity Forms, see the **E-Forms** module reference guide and the **Unity Forms** module reference guide.

If you are already logged on to the Unity Client when you click on a Unity Pop file or link, the content is opened in the existing instance of the Unity Client. If you are not logged on to the Unity Client, you are required to do so before viewing the Unity Pop content. After logging in, the Unity Client is launched in the system tray and the content is displayed.

Because you are required to log on to OnBase in order to view Unity Pop files and link, if you do not have rights to view the content in OnBase, you will not be able to view the content via Unity Pop.

---

**Note:** A Concurrent Client license is consumed while viewing Unity Pop files and links.

---

---

**Note:** If multiple Unity Pop files were sent to you with Lotus Notes, a ZIP file containing the Unity Pop files is attached to the email message. To view the Unity Pop files, open the ZIP file using a ZIP utility.

---



## Using Envelopes

Envelopes provide a way to bundle documents together for easy access, or to easily email 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, removing a document from an envelope will not delete the document from OnBase.
- 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 and delete envelopes.

---

**Note:** You must have appropriate privileges to use and delete envelopes. The only envelopes available to you upon login are the envelopes you created.

---

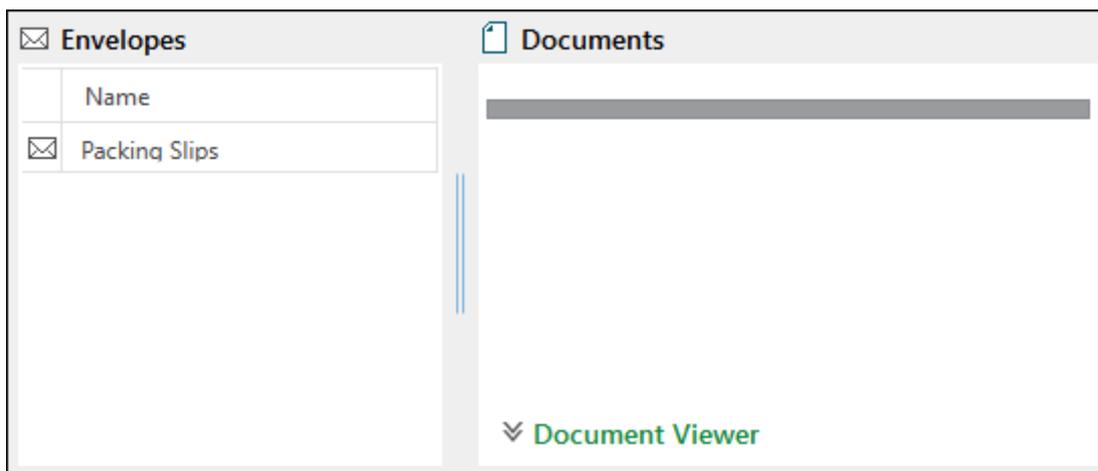
### Creating a New Envelope

To create a new envelope:

1. On the **Home** tab, click **Envelopes**:



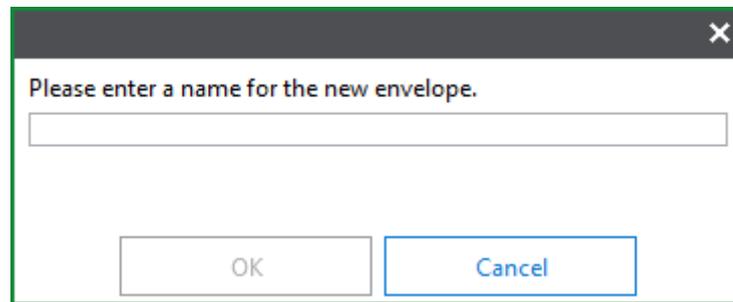
2. The **Envelopes** layout is displayed:



3. Perform one of the following:
  - Right-click in the **Envelopes** pane, and select **Create Envelope**.
  - On the **Envelopes** tab, click **Create Envelope**:



- The following dialog box is displayed:



- Type the name of the new envelope in the text field.

---

**Note:** Envelope names must be unique and cannot be left blank.

---

- Click **OK**.
- The new envelope is created and displayed in the **Envelopes** pane.

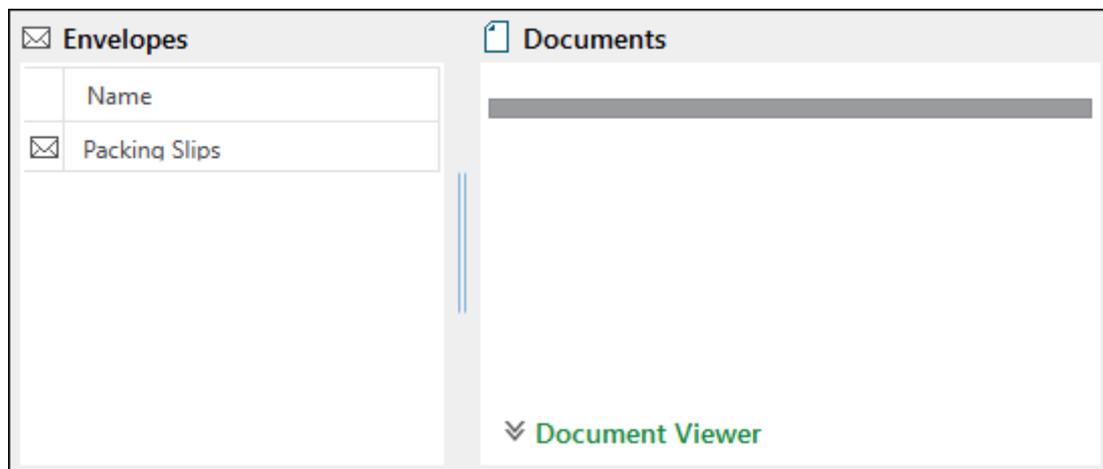
## Deleting an Envelope

To delete an envelope:

- On the **Home** tab, click **Envelopes**:



- The **Envelopes** layout is displayed:



- From the **Envelopes** pane, select one or more envelopes to delete.

4. Perform one of the following:
  - Right-click on the selected envelopes in the **Envelopes** pane, and select **Delete Envelope(s)**.
  - On the **Envelopes** tab, click **Delete Envelope(s)**:



5. The selected envelopes are deleted and removed from the **Envelopes** pane.

---

**Note:** Deleting an envelope does not remove its documents from OnBase. 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.

When sharing envelopes, note the following:

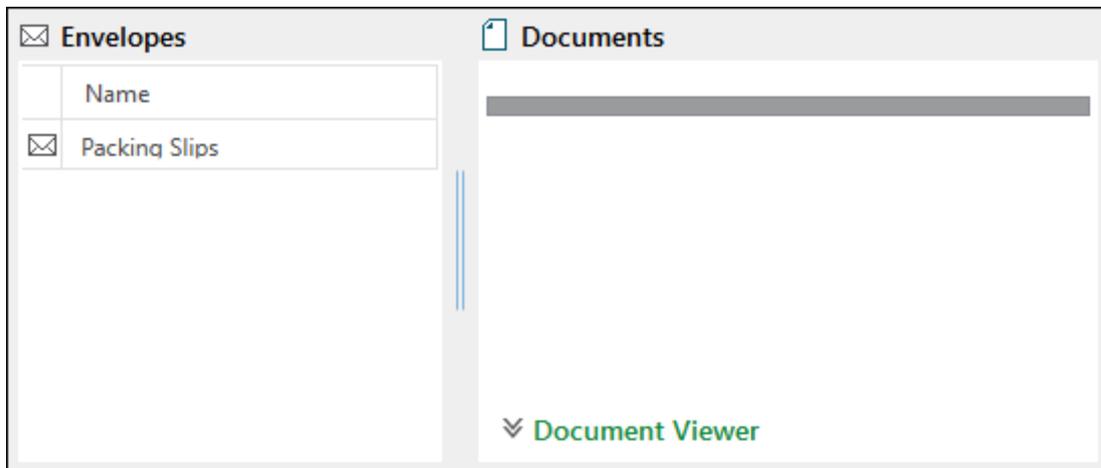
- Document Type user permissions are respected when sharing an envelope. For example, if you share an envelope with a user who does not have permission to Document Types in the envelope, the envelope will appear empty to that user. If the envelope contains both documents that the user does and does not have rights to, the Document Types the user can view are still displayed.
- In addition to Document Type permissions, users in the Unity Client must be privileged to retrieve and view documents in order to view documents in a shared envelope.

To share an envelope:

1. On the **Home** tab, click **Envelopes**:



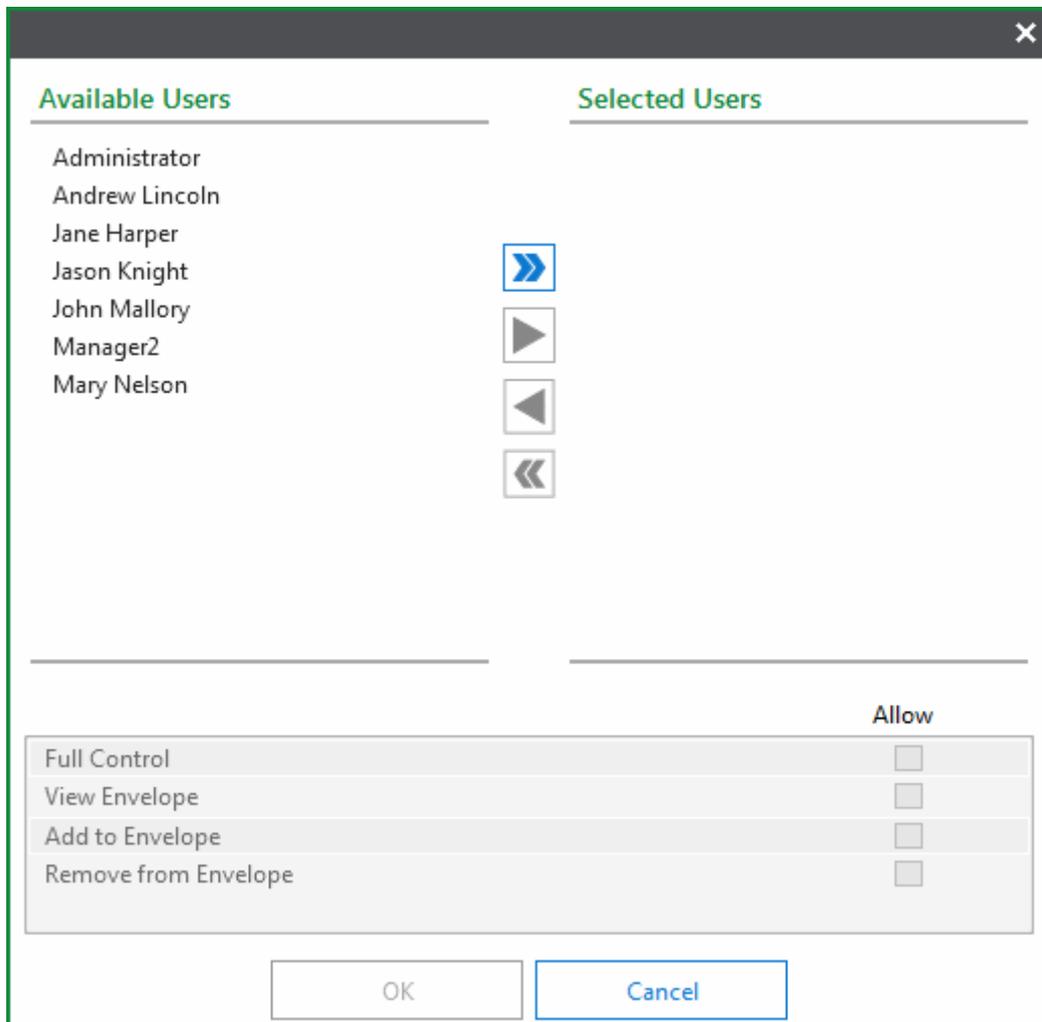
2. The **Envelopes** layout is displayed:



3. From the **Envelopes** pane, select the envelope to share.
4. Perform one of the following:
  - Right-click in the selected envelope, and select **Share Envelope**.
  - On the **Envelopes** tab, click **Share Envelope**:



5. The following dialog box is displayed:



6. From the **Available Users** list, select the users with whom to share the envelope, and click **Add**.  
To share the envelope with all available users, click **Add All**.

- To grant envelope permissions to one or more users, select users from the **Selected Users** list, and grant any of the following permissions:

Permission	Description
<b>Full Control</b>	<p>Allows the selected user to do the following:</p> <ul style="list-style-type: none"> <li>• Share the envelope.</li> <li>• Add documents to the envelope.</li> <li>• Remove documents from the envelope.</li> <li>• Delete the envelope.</li> </ul> <hr/> <p><b>Note:</b> When you delete an envelope that is shared with other users, the envelope is only deleted from your view. Other users will still be able to see the envelope.</p> <hr/>
<b>View Envelope</b>	Allows the selected user to view the envelope.
<b>Add to Envelope</b>	Allows the selected user to add documents to the envelope.
<b>Remove from Envelope</b>	Allows the selected user to remove documents from the envelope.

- Click **OK**.

## Adding or Removing Documents from Envelopes

This topic describes adding documents to envelopes and removing documents from envelopes.

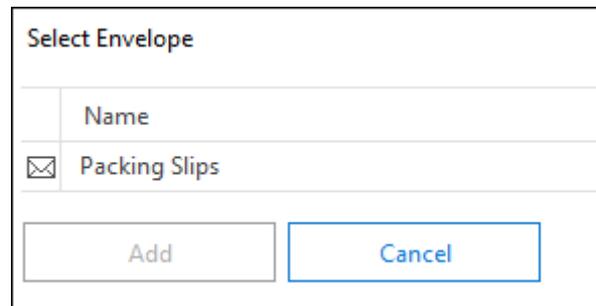
### Adding Documents to Envelopes

You can add an open document to an envelope, or one or more documents to an envelope from a Document Search Results list.

To add documents to an envelope:

- Perform one of the following:
  - Right-click and select **Send To | Envelope**.
  - On the **Document** tab, click **Send To** and select **Envelope**.

- The **Select Envelope** pane is displayed:



- Select the envelope to which the documents are to be added, and click **Add**.
- The documents are added to the envelope, and the pane is closed.

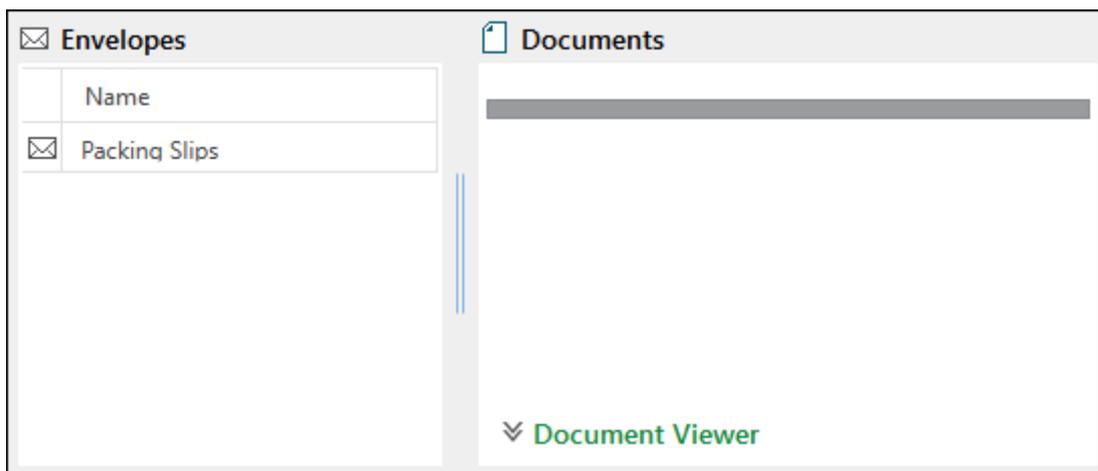
## Removing Documents from Envelopes

To remove documents from an envelope:

- On the **Home** tab, click **Envelopes**:



- The **Envelopes** layout is displayed:



- Select an envelope. The envelope's documents are displayed in the **Documents** pane. Envelope contents are displayed in the same format as a Document Search Results list. For more information, see [Document Search Results List on page 74](#).
- 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 **Ctrl + Click** techniques.

---

- Right-click and select **Remove From Envelope** to remove the document(s).

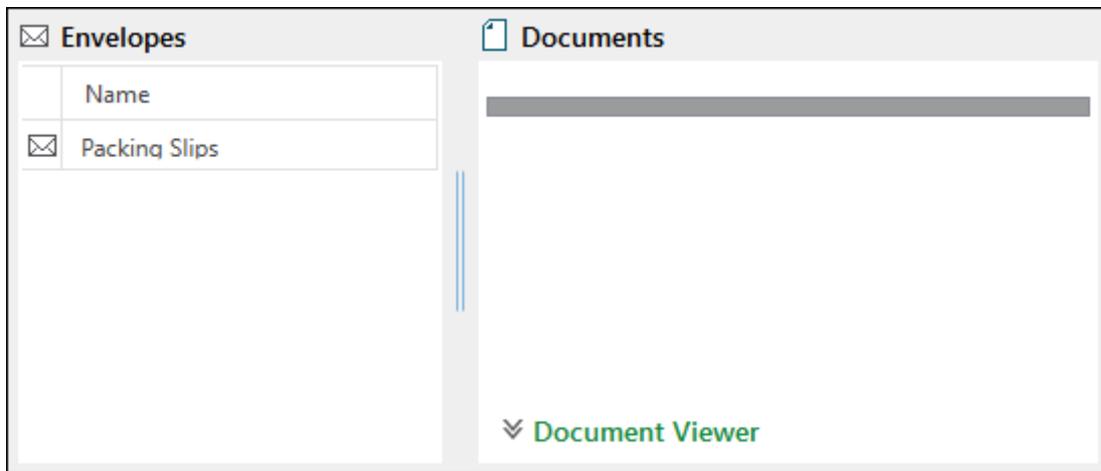
## Opening Existing Envelopes

To open an existing envelope:

1. On the **Home** tab, click **Envelopes**:



2. The **Envelopes** layout is displayed:



3. From the **Envelopes** pane, select an envelope.
4. The envelope's documents are displayed in the **Documents** pane. Envelope contents display in the same format as a Document Search Results list. For more information, see [Document Search Results List](#) on page 74.

---

**Note:** To refresh an envelope's contents, double-click the name of the envelope in the **Envelopes** pane.

---

## Importing Documents

You can use the Unity Client to import documents to OnBase.

When importing documents in the Unity Client, consider the following:

- If importing a Microsoft Excel document, remove the **Shared Workbook** setting from the document in Excel before importing.
- The Unity Client Document Viewer does not support viewing XML documents imported as Microsoft Office file types. Before importing these documents, contact your system administrator.
- Email messages and their attachments are imported into OnBase as separate documents. To import an email message as one document with its attachments embedded, first save the email message as an .EML or .MSG file.
- As .dotm and .dotx files are Microsoft Word Templates, modified versions are automatically saved to OnBase as new documents. If this is not the intended behavior, the files should be saved as .docx or .doc files before importing them into OnBase.
- When importing a .dotx file, the file is opened externally and must remain open until the import process is completed.
- Importing AFP files is not supported in the Unity Client. For more information, see the **AFP Input Filter** module reference guide.

---

**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, Import, and Add/Modify Keywords.

---



---

**Note:** Unless otherwise noted, OnBase does not support the import of files larger than 2 GB.

---

To begin the Import process:

1. On the **Home** tab, click **Import**.
2. Select one of the following input methods:

Import	Description
	<p><b>Browse</b> imports the document from a drive accessible from your workstation. Refer to the below section on Importing Documents by Browsing for additional information.</p>

Import	Description
	<p><b>Acquire</b> scans in the document using a scanner, or imports the document image from a scanner, digital camera, or other supported digital storage device.</p> <p>Refer to the below section on Importing Documents by Acquiring for additional information.</p>
	<p><b>Drive</b> allows you to access documents stored in your Google Drive account and to import them to OnBase.</p> <p>Refer to the below section on Importing Documents from Google Drive for additional information.</p>

You can also drag and drop a file into the **Preview** pane. For more information, see [Importing Documents by Dragging and Dropping on page 287](#).

## Importing Documents by Browsing

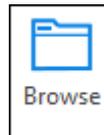
**Browse** imports the document from a drive accessible from your workstation.

To import documents by browsing for them:

1. In the **Create** ribbon group on the **Home** tab, click **Import**:



2. The **Import** layout is opened. In the **Import** ribbon group, click **Browse**:



3. The standard Windows **Open File** dialog box is displayed.
4. Locate the document(s) to import.
5. Select the desired document(s).
6. Click **Open**.
7. To preview, edit, and index the new imported document(s), see [Completing the Import Process on page 288](#).

## Importing Documents by Acquiring

**Acquire** scans in the document using a scanner, or imports the document image from a scanner, digital camera, or other supported digital storage device. To import documents using the **Acquire** option:

1. In the **Create** ribbon group on the **Home** tab, click **Import**:



2. The **Import** layout is opened. In the **Import** ribbon group, click **Acquire**:



---

**Note:** If more than one device is connected to your workstation, you are prompted to select an imaging device.

---

### If you select a scanner:

1. The device's scanning interface is displayed.
2. Select the desired scan settings, such as image resolution and page size.

---

**Tip:** Depending on your scanning interface, you can receive help by clicking the **Help** button, or clicking the Windows **Help** button in the upper-right corner and then clicking the setting.

---

3. Click **Scan**.
4. Continue to the steps outlined in the **Completing the Import Process** section to preview, edit, and index the newly imported document(s).

---

**Note:** Black and white images are stored as Group 4 compressed TIFF images in OnBase. Color and grayscale images are stored as JPEG images.

---

### If you select a camera:

1. The Windows Image Acquisition (WIA) **Get Pictures** interface is displayed.

---

**Note:** If the camera is not detected, ensure that the Windows Imaging Service is enabled and started. For information on the Windows Imaging Service, consult the Windows help files.

---

2. Select the images to import.
3. Click **Get Pictures**.
4. Continue to the steps outlined in the **Completing the Import Process** section to preview, edit, and index the newly imported document(s).

## Importing Documents from Google Drive

Documents created and stored in Google Drive, if a download or export link is available, may be imported into OnBase.

---

**Note:** Your workstation must be configured to use Google Services. Contact your system administrator for additional information.

---

**Note:** Google Forms cannot be viewed within OnBase.

---

Some documents created in Google Drive cannot be imported into OnBase in their native file formats. The files are converted into their Microsoft file equivalents before import. The table below outlines the file conversion for each Google document type:

Google Application File	Converted File Format
Document	.docx
Spreadsheet	.xlsx
Presentation	.pptx
Drawing	.png

---

**Caution:** Due to the file conversion process, formatting differences may occur. Similar formatting differences can be seen when you download Google documents to your desktop.

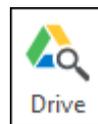
---

To upload documents from Google Drive:

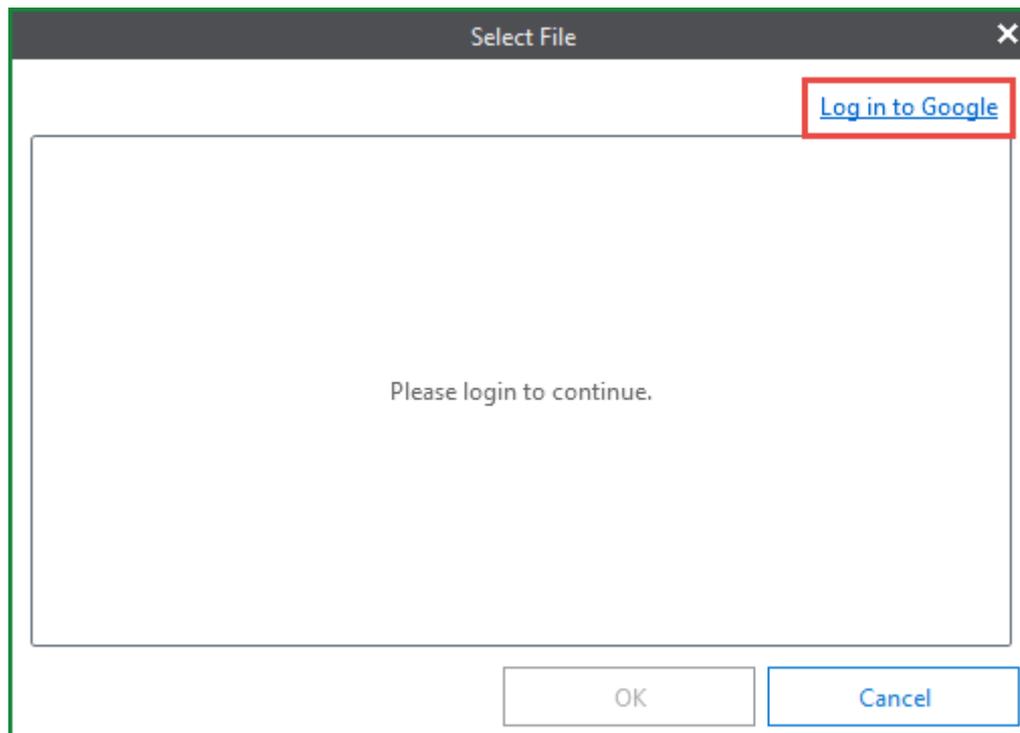
1. In the **Create** ribbon group on the **Home** tab, click **Import**:



2. The **Import** layout is opened. In the **Import** ribbon group, click **Drive**:



3. The **Select File** dialog is opened. If you have not already logged into your Google account, you will be prompted to do so. Click **Log in to Google**:



---

**Note:** If a Google account is already logged in and you would like to switch users, you can click the profile icon and select **Log out from Google** to log the Google account out of OnBase. You will also need to log out of Google from your web browser to log out fully.

---

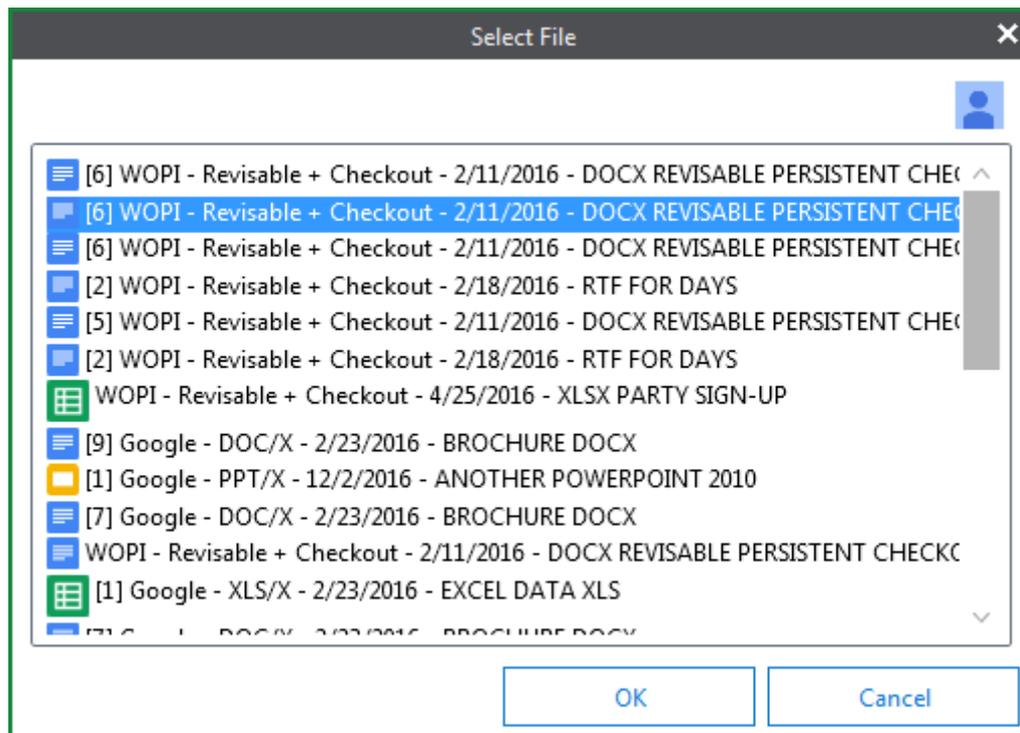
4. If you clicked **Log in to Google**, a Google login page is opened. Enter the **Email** and **Password** associated with your Google account, then click **Sign in**.
5. If it is your first time accessing Google Drive through OnBase, you may be asked to confirm that the application has permission to view and manage your Google account information. Click **Accept**.

---

**Note:** If **Cancel** is clicked, permission to the application will be denied. You must close and re-open the Google Drive upload dialog to accept the permissions.

---

- After you have signed in to your Google account and accepted the checkout permissions, the **Select File** dialog is populated with a list of documents contained within your Google Drive:



- Select a document for import by left-clicking the document name:
- Click **OK**. The document is featured in the **Import** layout.
- Continue to the steps outlined in the Completing the Import Process section to preview, edit, and index the newly imported document(s).

## Importing Documents from Third-Party Google Applications

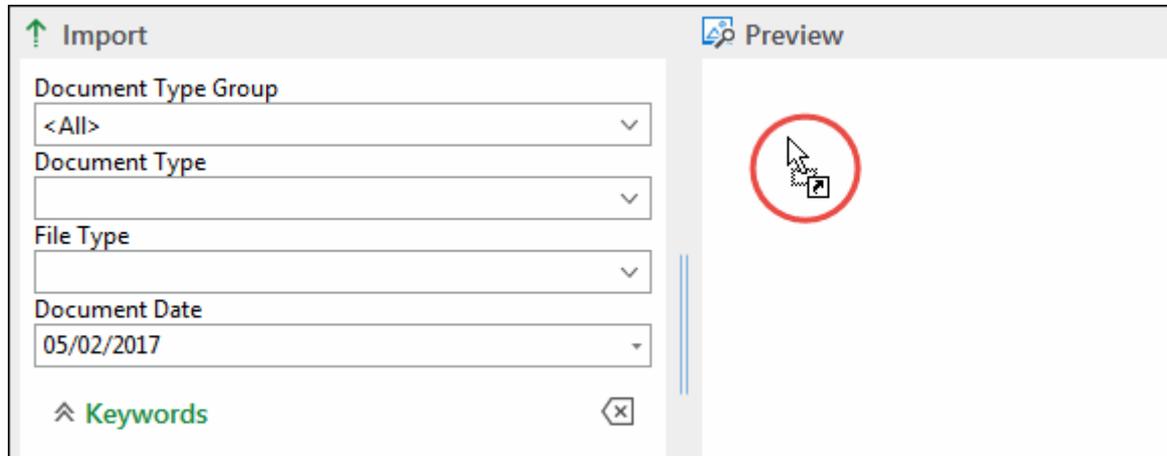
Files created by third-party Google applications may not properly import into OnBase. This is because third-party applications do not always provide download or export links and cannot be converted into a compatible file format. An error message will be shown if a file created by a third-party Google application is unable to be imported into OnBase:

**The remote server returned an error: (401) Unauthorized.**

As with any document imported from Google Drive, files from third-party applications may be subject to formatting errors upon import.

## Importing Documents by Dragging and Dropping

You can import a document, including Microsoft Outlook emails or email attachments, by dragging and dropping it onto the **Import** or **Preview** panes:



When you drag and drop documents, you can only queue one document for import at a time, unless you are licensed for EDM Services.

---

**Note:** Files dragged and dropped in this manner will be brought into the **Import** dialog in the order in which they were selected in Windows Explorer. This order is influenced by which file you click and hold to drag the group of files. For example, if files 1, 2, 3, 4, and 5 were selected in Windows Explorer and you clicked on file 3 to drag them into the **Import** dialog, the files would be organized in the **Import** dialog as follows: 3, 4, 5, 1, 2.

---

**Note:** If you are in the process of importing a document and attempt to drag-and-drop import a document with a different file extension, you are prompted that you have not imported your original document. Click **Yes** to remove the original document and import the new document. Click **No** to retain the original document and continue importing it.

---

**Note:** When you drag and drop documents, the source program must be the same account type as the Unity Client. For example, if the Unity Client is running in administrator mode (accessed by right-clicking the executable file and selecting **Run as administrator**), Microsoft Outlook must be running in administrator mode to drag and drop emails or email attachments.

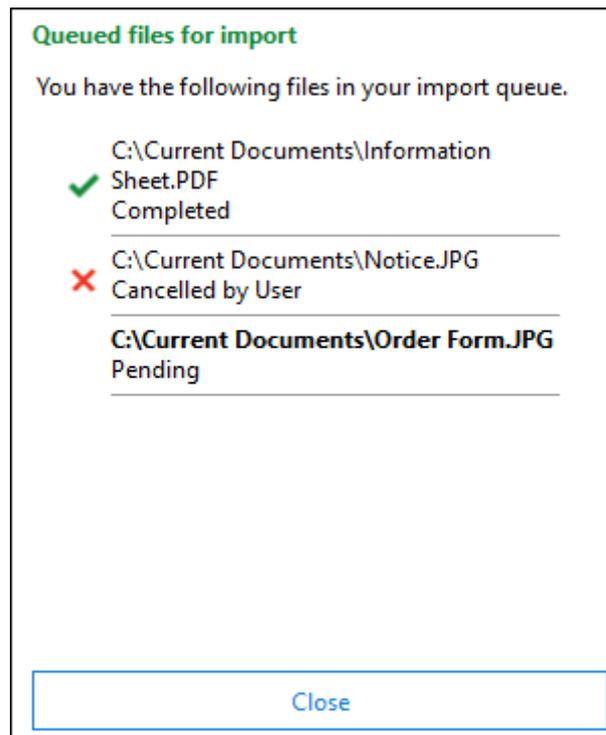
---

To preview, edit, and index the new imported document(s), see [Completing the Import Process](#) on page 288.

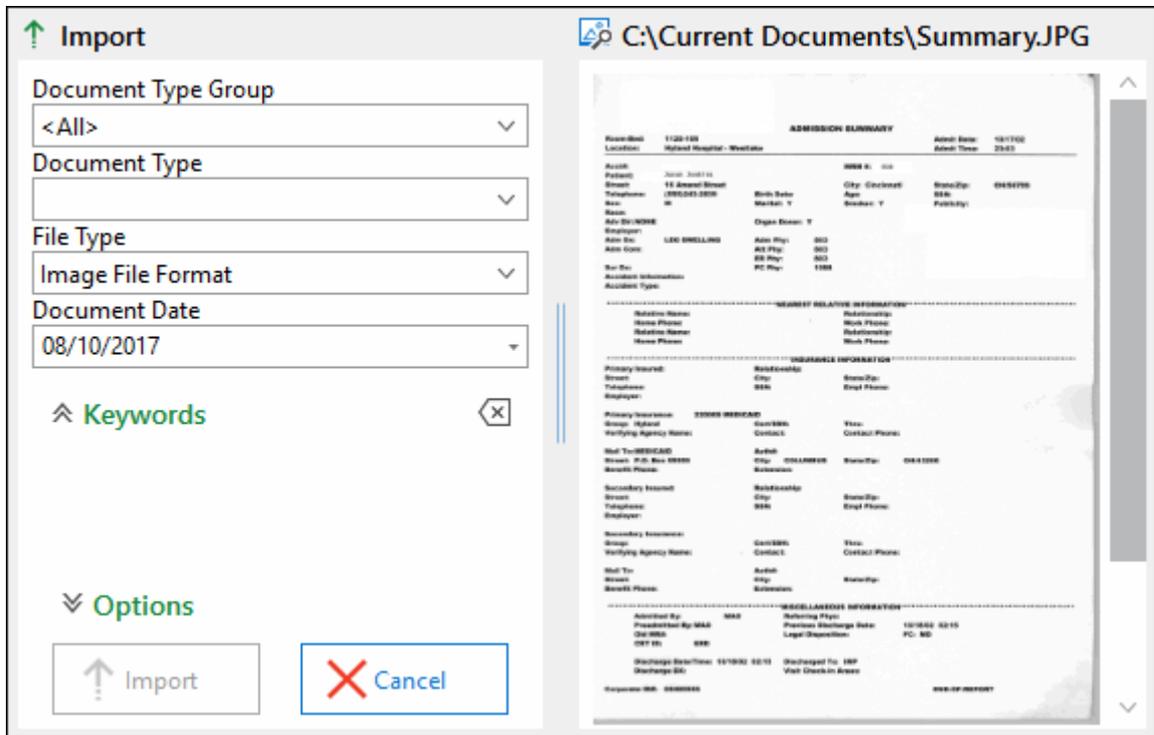
## Completing the Import Process

When you upload multiple image documents with the same file extension (i.e., .tif images), you are prompted to combine these image documents into one document. Click **Yes** to create and import a single multi-page document. Click **No** to import each document separately using the **Queued files for import** pane.

When you upload multiple documents with different file extensions, the **Queued files for import** pane displays the names of these documents:



1. The document, or a hyperlink to the document, is displayed in the **Preview** pane if the File Type is compatible with the **Preview** pane:



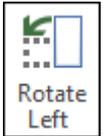
**Note:** When an OLE document is displayed in the **Preview** pane, the document can be edited. Modifications are saved when the document is uploaded. Modifications are not saved if you cancel the upload. Any changes you make in the Preview pane are not saved to the original document.

**Note:** Preview eligibility is dependent on File Type. Preview of other File Types is handled by Internet Explorer and installed applications.

If you are importing an image file, a thumbnail viewer is displayed. The following actions are available:

Pages	Description
	<p><b>Move Up</b> moves the selected page up one position.</p>
	<p><b>Move Down</b> moves the selected page down one position.</p>

Pages	Description
 Remove	<b>Remove</b> removes the selected page.
 Remove All	<b>Remove All</b> removes all pages.

Transforms	Description
 Rotate Left	<b>Rotate Left</b> rotates the document 90 degrees counterclockwise.
 Rotate Right	<b>Rotate Right</b> rotates the document 90 degrees clockwise.

- From the **Document Type Group** drop-down list, select the Document Type Group to be assigned to the document by OnBase. After selecting a Document Type Group, OnBase automatically filters the available Document Types in the **Document Type** drop-down list.

---

**Note:** When **<All>** is selected, Document Types from all Document Type Groups are available for selection from the **Document Type** drop-down list.

---

- From the **Document Type** drop-down list, select the Document Type to be assigned to the document by OnBase. After selecting a Document Type, OnBase automatically displays fields for Keyword Types that are used to index documents of that type.

---

**Note:** If you select a different Document Type during upload, entered Keyword Values are cleared. Default values for common Keyword Types are either updated or cleared when selecting a different Document Type, depending on whether the selected Document Type has default values for those Keyword Types.

---

4. If OnBase can associate the file extension with a file type (format), that file type is automatically selected from the **File Type** drop-down list. For example, if you import a file whose extension is .tif, OnBase will select **Image File Format**.

If OnBase has not selected the file type, select the appropriate type from the **File Type** drop-down list.

---

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

---

5. Select a **Document Date**.
6. Type Keyword Values in the **Keywords** pane, or verify that any Keyword Values in the **Keywords** pane are accurate.

Depending on your system's configuration, some Keyword 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:** Red Keyword text warnings are not available in Unity Briefcase.

---

You can use the **Tab** key to move to the next Keyword Value field.

---

**Note:** If the primary Keyword you enter is associated with multiple AutoFill Keyword Sets, the **Select Keyset** dialog box will appear when the **Tab** key is pressed. In the Select Keyset dialog box, you can select an available AutoFill Keyword Set to populate the **Keywords** pane. For more information about AutoFill Keyword Sets, please refer to the **AutoFill Keyword Sets** documentation.

---

---

**Note:** When uploading documents of two different Document Types which contain a common keyword, if the common keyword has a default value on the Document Type, the default value is cleared for the second Document Type. Only keywords modified by the user will be remembered.

---

You can clear Keyword Values by clicking the **Clear Keywords** button:



---

**Note:** Depending on the module, the Keyword Values may be read-only.

---

7. Expand the **Options** pane. Depending on your system's configuration, one or more of the following check boxes may be available:
  - **Open Document After Import** - Select to open the document after it is uploaded.

---

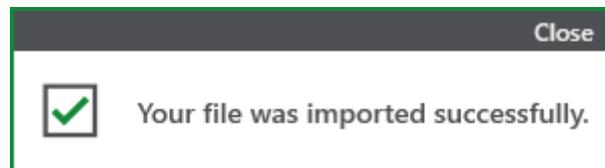
**Note:** If you are uploading a text rendition of an image document and you select **Open Document After Import**, the image rendition of the document will be displayed in the Document Viewer. This is because the image rendition is the original rendition of the document.

---

- **Delete Files After Import** - Select to delete the document from its original location after it is uploaded.
  - **Hide Scanner Settings** - Select to hide the scanner settings dialog when ad-hoc scanning. You will not be prompted to select a device, unless more than one device is connected to your workstation.
8. Click **Import** to import the image, or click **Cancel** to cancel the import.

After clicking **Import**, an indicator displays import progress. When the import is complete, a message is displayed near the system tray stating:

**Your file has been imported successfully.**



If you are using drag-and-drop upload to import multiple documents, repeat steps 1 through 8 to import remaining documents.

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 or revision of a document. If you are prompted to import another image, click **Yes** to import another image, or click **No** to close the WIA interface.

---

**Note:** Importing a revision of a document that is of a different file type than the original document is not supported in Unity Briefcase.

---

If you are licensed for EDM Services and are uploading an image document to a revisable image document type, you can append the new image document as a page of the revisable document. For more information, see the EDM Services documentation.

---

**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 **Import Failed** message, contact your system administrator.

---

## Multi-Page TIFF Images

If you are using a Windows 7 operating system or later, you can import multi-page TIFF images in any compression format.

---

**Note:** When attempting to import a multi-page TIFF image with Group IV Fax compression, the thumbnails displayed in the **Preview** window may behave erratically. This is an indication that the multi-page TIFF image cannot be imported into OnBase. As a workaround, click **Cancel** to cancel image import. Separate the multi-page TIFF into multiple single-page files using an imaging application, or convert the multi-page TIFF to a different file format (e.g., PDF). Repeat the above steps to successfully import the file(s) into OnBase.

---

## Appending Pages to an Existing Document

Depending on your configuration, during the import process, you can append a file to an existing document in the same Document Type with the same File Type and Keyword Values. For Document Types with a default file format of Image File Format, when you import a document that contains the same indexing information as another document already residing in OnBase, the append pages dialog box is displayed. From this dialog box, you can either append the document to an existing document, or you can save the document as a new document in OnBase.

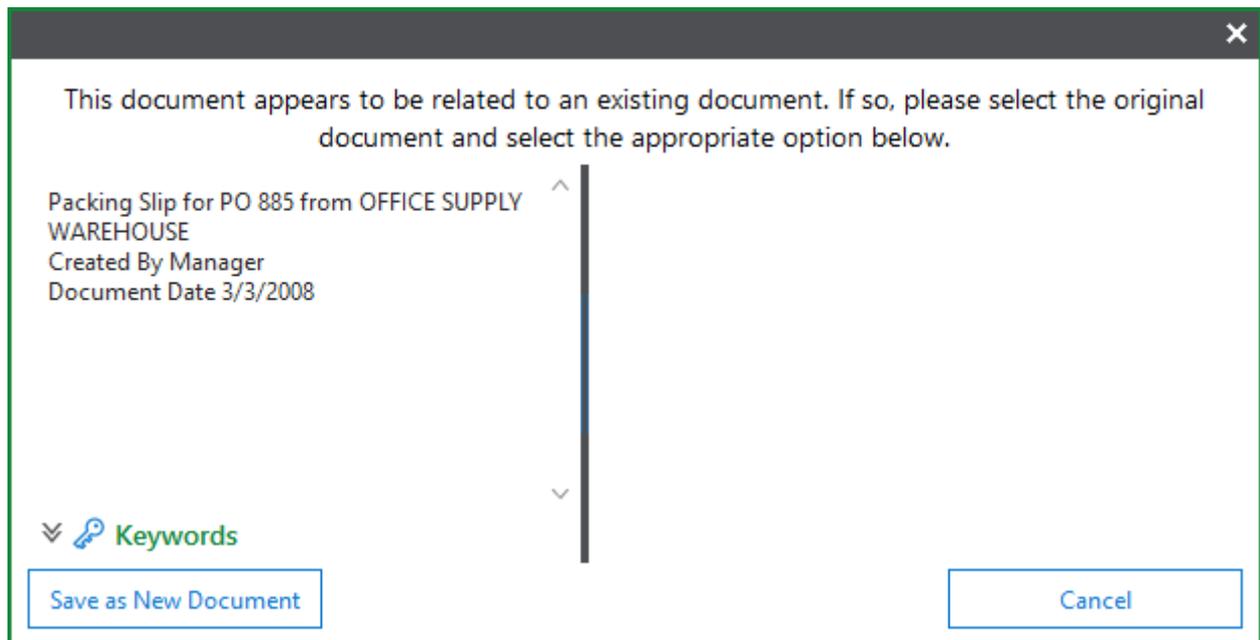
---

**Note:** Depending on your configuration, the append pages dialog box may also be displayed when you attempt to import a document containing the same indexing information as another document, and the document type is configured to be revisable. For information about saving a document as a revision of an existing document, see the EDM Services documentation.

---

To append the document to an existing document:

1. Import a document containing the same indexing information as an existing document already residing in OnBase. The append pages dialog box is displayed:



2. Select the existing document from the list of documents.

3. The selected document is displayed:

4. The existing document’s Keyword Values are displayed in the **Keywords** pane.

5. Click one of the following buttons:

Button	Description
<b>Append Page(s)</b>	Appends the document to the existing document in OnBase.

Button	Description
<b>Save as New Document</b>	Saves the document as a new document in OnBase.
<b>Cancel</b>	Cancels the import process. No new pages or documents are added.

# Printing

This section describes how to print documents using the OnBase Unity Client.

## Printing Documents

**Print** is available from the **Document** tab ribbon if you have the appropriate user rights.

---

**Note:** When printing PDF documents with a paper size other than 8.5 x 11 inches, use the print option on the Adobe toolbar.

---

1. To print a document, perform one of the following actions:

- From a Document Search Results list, select one or more documents, right-click and select **Print**.
- From an open document, click **Print** on the **Document** tab.
- From an open image or text document, right-click and select **Print**.

2. The **Print** pane is displayed:

**Print**

  
 Print

**Print**

Copies:

---

**Print To...**



Microsoft XPS Document Writer

Printing Device

▼

[Printer Properties](#)

---

**Print Format**

< Default >

▼

---

**Settings**



Print All Pages

Print the entire document

▼

Pages: (i)

---



Portrait Orientation

▼

---



No Overlay

▼

---



Grayscale

▼

---



Note Options

None

▼

---



Current Revision

Print the current revision

▼

---



Best Fit Scaling

Fit the image to the page

▼

---



Job Settings

None

▼

---

Set As Default

Close

---

**Note:** Depending on your configuration, printing an Electronic Form (E-Form) or HTML document from the Document Viewer will print the document using Internet Explorer instead of OnBase.

---

3. In **Copies**, type or select the number of copies you want to print.

---

**Note:** When printing several copies of a multi-page document to XPS or PDF Creator, some print jobs may combine.

---

4. Select one of the available printers from the **Print To...** drop-down select list.

---

**Note:** Click the **Printer Properties** hyperlink to configure options specific to the selected printer. See the documentation for your printer for more information on these options. This hyperlink is not available when printing to a print queue.

---

5. Select a print format from the **Print Format** drop-down list. Print formats determine the appearance of the selected documents. When you select a print format, its settings are used as defaults for subsequently printed documents of the same Document Type. If a batch is selected, or your system administrator has not associated a print format with the Document Type, the settings is **<Default>**. To override the print format defaults, change the settings in the **Print** pane.

When printing multiple items with varying document types, select **<Use Doc Type Default>** from the **Print Format** drop-down list. This selection will allow each document to print using the print format configured for each Document Type.

---

**Caution:** If using the **<Use Doc Type Default>** setting, do not use the **Printer Properties** option. A conflict between assigned options may occur and result in unexpected output. If you have used the Printer Properties option and have also changed a standard setting (such as **Orientation**) that may conflict with the Document Type default print settings, the **<Use Doc Type Default>** setting overrides any options set in the **Printer Properties** dialog.

---

---

**Note:** The **<Use Doc Type Default>** setting is not available for Document Types that have Default Print Format set to **<None>**.

---

---

**Note:** You cannot apply a print format when printing PDF or OLE documents.

---

6. Select from the following **Settings** drop-down lists:

Setting	Description
<b>Print Range</b>	<p><b>Print All Pages:</b> Prints all pages of the document(s).</p> <p><b>Print Custom Range:</b> Prints a range of pages from the image or text document. Type a range of pages in the <b>Pages</b> field. If you type a complex range into this field, the pages will be printed in the appropriate order. For example, you could enter <b>5, 1-3, 9</b>. In this case, page 5 of the document would be printed first, followed by pages 1, 2, 3, and 9.</p> <hr/> <p><b>Note:</b> When printing multiple documents, the <b>Print Custom Range</b> setting is only available if the first document selected supports printing a range of pages. It is not available when the first document selected does not support printing a range of pages, or when printing documents that do not support page range selection.</p> <hr/> <p><b>Note:</b> Printing complex custom ranges is not supported when printing to a network printer.</p> <hr/> <p><b>Print Current Page:</b> Prints the current page of the document.</p> <hr/> <p><b>Note:</b> The Print Current Page setting is not available when printing a document from a document Search Results list.</p> <hr/> <p><b>Note:</b> The Print Current Page setting is not available when printing HTML documents, XML documents, E-Forms, Unity Forms, multiple documents, or when printing documents that do not support page range selection.</p> <hr/> <p><b>Note:</b> This setting is not supported when printing PDF documents.</p> <hr/>
<b>Orientation</b>	<p><b>Portrait Orientation:</b> Prints the top of the page on the shortest side of the paper.</p> <p><b>Landscape Orientation:</b> Prints the top of the page on the longest side of the paper.</p> <p><b>Auto Orientation:</b> Prints the page according to its dimensions. For example, if the height of the page is greater than the width, <b>Portrait Orientation</b> will be used. If the width of the page is greater than the height, <b>Landscape Orientation</b> will be used.</p> <hr/> <p><b>Note:</b> This setting is not supported when printing PDF or OLE documents.</p> <hr/> <p><b>Note:</b> This setting is not respected when printing XML documents. XML documents are printed using the default orientation setting of the printer.</p> <hr/>

Setting	Description
<b>Print Overlay</b>	<p><b>No Overlay:</b> Prints the document without the associated overlay.</p> <p><b>Print Overlay:</b> Prints the document with the associated overlay. The overlay that is printed may be different than the overlay that is displayed, depending on the configuration of the Document Type.</p> <p><b>Fax Compatible Overlay:</b> Select this option if you are printing to a fax machine. OnBase arranges the overlay image in a way that faxing software can properly interpret. The overlay that is faxed may be different than the overlay that is displayed or printed, depending on the configuration of the Document Type.</p> <hr/> <p><b>Note:</b> This setting is not supported when printing PDF or OLE documents.</p> <hr/>
<b>Color Options</b>	<p><b>Grayscale:</b> Prints the document in black and white.</p> <p><b>Color:</b> Prints the document in color, if a color printer is available.</p> <hr/> <p><b>Note:</b> Depending on your installed print drivers, these options may not be respected with certain printers.</p> <hr/>
<b>Note Options</b>	<p><b>Note Icon/Annotation on Document:</b> Prints the note icon/annotation (graphical representation of a note) on the document.</p> <hr/> <p><b>Note:</b> This setting is not supported when printing PDF or OLE documents.</p> <hr/> <p><b>Note Text on Document:</b> Prints the note text on the document. This setting is not respected by Overlapped Text annotations.</p> <hr/> <p><b>Note:</b> This setting is not supported when printing PDF or OLE documents.</p> <hr/> <p><b>Note Text After Document:</b> Prints the text of the document notes in the specified page range on a separate page.</p> <hr/> <p><b>Note:</b> Depending on your system's configuration, some note icons or text may not be printed no matter what <b>Notes Options</b> you have selected. See your system administrator if you have questions.</p> <hr/>
<b>Print Revision</b>	<p>These options are only available if your database is licensed for EDM Services. For more information, see the EDM Services module reference guide.</p>
<b>Image Scaling</b>	<p><b>Best Fit Scaling:</b> Prints image to fit, with scaling as necessary.</p> <p><b>One to One Scaling:</b> Prints image actual size/scale (1:1 in terms of inches).</p> <hr/> <p><b>Note:</b> This setting is not supported when printing PDF or OLE documents.</p> <hr/>

Setting	Description
<b>Job Settings</b>	<p><b>Single Job:</b> If multiple documents are highlighted, <b>Single Job</b> instructs the system to combine the selected documents into a single Windows print job, rather than printing each separately.</p> <p><b>Continuous Flow:</b> If multiple documents are selected and are formatted for a multi-image layout on the page, the <b>Continuous Flow</b> option instructs the system to continue filling the page with images from the next document, filling the existing multi-page format before proceeding to the next page.</p> <p><b>Example of Continuous Flow:</b> 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 <b>Continuous Flow</b>, your output would be two pages, the first page having two documents and the second page having the third document.</p>
<b>Set As Default</b>	<p>When selected, this option will use the selected settings as the default print settings. The settings will remain selected by default on the workstation for all document types until this option is deselected. If a setting is changed or <b>Set as Default</b> is deselected, the settings will remain selected until the user changes them, prints, or closes the <b>Print</b> pane.</p> <hr/> <p><b>Note:</b> This setting is not respected by the selections made for the following settings: <b>Print To...</b> when a print queue is selected, <b>Print Format</b>, <b>Print Overlay</b>, and <b>Print Range</b>.</p> <hr/>

7. Click **Print**.

---

**Note:** When printing multiple documents, the documents are printed in the order in which you selected them.

---

## 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.

**The following documents were not printed:**

---

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

---

# Reports

## Creating List Reports

---

**Note:** To create list reports, a user must have the Create List Report privilege.

---



---

**Note:** List reports cannot be generated from Full Text Search result lists.

---

List reports are text documents that can contain the date the report was created; the time the report was created; the user who created the report; the configured Auto-Names of documents selected within a **Document Search Results** list, a batch queue, or a Workflow life cycle; the total number of documents; and the total time spend processing the report. These reports are stored in the **SYS List Contents Report** Document Type.

An example of a list report is shown below.

```

-----
LSTRPT055PAGE: 1
11/24/2014 11:56:55AM      List Contents Report by Cindy Smith on 11/24/2014 at 11:56:55AM
Search Results Title: AP - Purchase Order
-----
Purchase Order 999 for TAP-IT BUTTONS, INC in the amount of $313.75
Purchase Order 992 for PHONE SHACK in the amount of $4,000.00
Purchase Order 990 for OFFICE SUPPLY WAREHOUSE in the amount of $500.00
Purchase Order 989 for COMPUTERS ARE US in the amount of $959.00
Purchase Order 898 for TAP-IT BUTTONS, INC in the amount of $1,512.50
Purchase Order 885 for OFFICE SUPPLY WAREHOUSE in the amount of $281.14
Purchase Order 888 for PHONE SHACK in the amount of $1,110.00
Purchase Order 881 for COMPUTERS ARE US in the amount of $800.00
Purchase Order 797 for TAP-IT BUTTONS, INC in the amount of $600.00
Purchase Order 779 for PHONE SHACK in the amount of $3,000.00
Purchase Order 767 for OFFICE SUPPLY WAREHOUSE in the amount of $834.60
Purchase Order 765 for COMPUTERS ARE US in the amount of $854.40
Purchase Order 676 for TAP-IT BUTTONS, INC in the amount of $1,183.00
Purchase Order 662 for PHONE SHACK in the amount of $3,210.00
Purchase Order 660 for OFFICE SUPPLY WAREHOUSE in the amount of $208.65
Purchase Order 656 for COMPUTERS ARE US in the amount of $3,775.00
-----
Total Documents           : 16
Total Processing Time     :   0 Hours, 0 Minutes, 1 Seconds

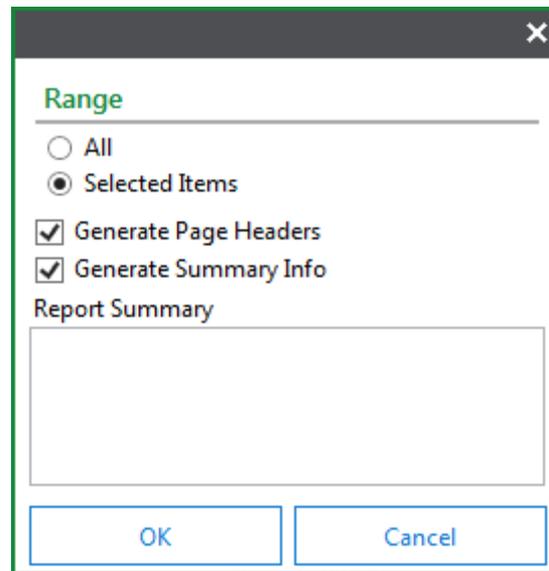
```

The header at the top of the report displays who created the report and when. Below the header is the report summary (if one was entered when the report was created), followed by the Auto-Name strings of the reported documents. The end of the report lists the total number of documents in the report and the total processing time.

## Document Search Results Lists and Batch Queues

To create a List Content Report for document(s) in a **Documents Search Results** list or a batch queue:

1. Right-click on selected document(s) and select **Create List Report**.
2. Choose options in the **List Report Options** dialog box.



Option	Description
<b>All Items</b>	This option generates information about all documents in the list. <hr/> <b>Note:</b> Although the Document Search Results list is limited to display 65,535 documents, the report will contain information for all documents that meet search criteria, even if the number of documents is greater than 65,535. <hr/>
<b>Selected Items</b>	This option generates information about the selected item(s) only.
<b>Generated Page Headers</b>	This option generates the following header on the first line of every page of the report: <b>LSTRPT055PAGE: page #</b>
<b>Generate Summary Info</b>	This option generates the <b>Total Documents</b> and <b>Total Processing Time</b> at the end of the report.
<b>Report Summary</b>	This option allows you to add up to 80 characters of text to the report.

3. Click **OK**. The List Contents Report will display containing a report on the selected criteria. The header of the report contains the Date, Time and the User Name of the creator of the report. When you create a List Contents Report from a Document Search Results list, it also contains a **Search Results Title** that identifies the Document Type or Document Type Group used to create the list.

## Introduction

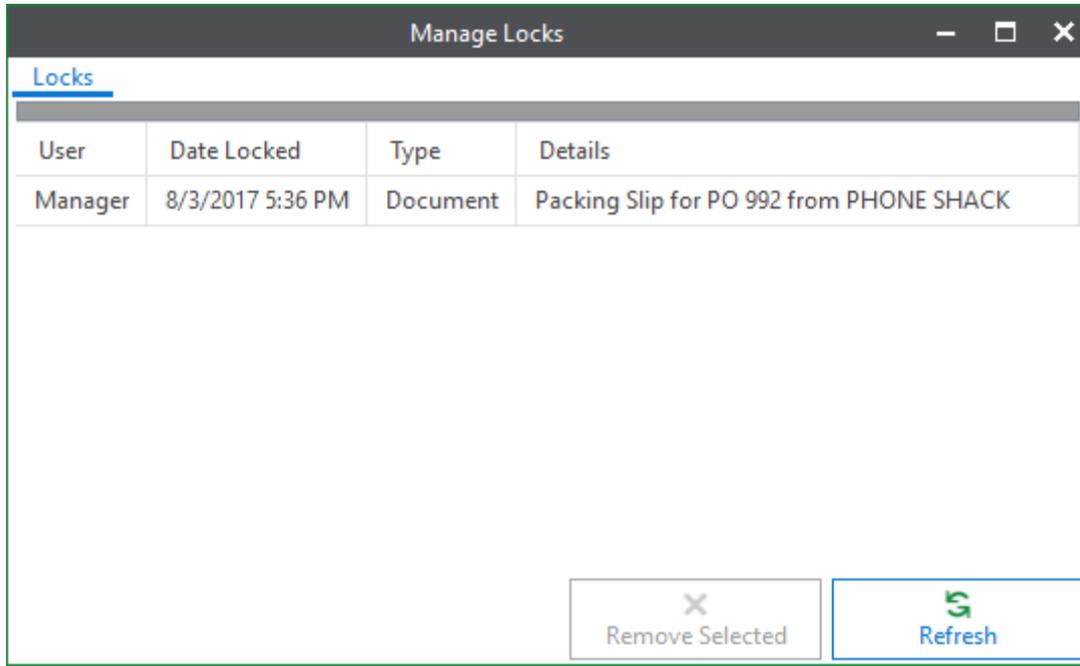
This chapter details information necessary to perform administrative activities in the OnBase Unity Client.

The following areas are covered in this chapter:

- [Managing Locks on page 308](#)
- [User Administration on page 311](#)
- [User Option Policy Administration on page 322](#)
- [Personal Page Tile Group Administration on page 346](#)
- [Troubleshooting Layout on page 358](#)

## Managing Locks

OnBase allows you to manage document, Disk Group, or process locks using the **Manage Locks** dialog box:



To open the **Manage Locks** dialog box, click the Unity Client **File** menu. Then, select **Administration | Manage Locks**.

The **Manage Locks** dialog box contains the **Locks** and **Checkouts** tabs.

Each row on the **Locks** tab contains the following information:

Column	Description
<b>User</b>	Displays the name of the user that placed the lock. <hr/> <b>Note:</b> Depending on your system configuration, the real name of the user may be displayed. <hr/>
<b>Date Locked</b>	Displays the date and time that the lock was created.
<b>Type</b>	Displays one of the following types of locks: <ul style="list-style-type: none"> <li>• <b>Document</b> - A document lock.</li> <li>• <b>Disk Group</b> - A Disk Group lock.</li> <li>• <b>Process</b> - A process lock.</li> </ul>

Column	Description
<b>Details</b>	Displays additional information about the lock. <ul style="list-style-type: none"> <li>• For document locks, the document's Auto-Name string is displayed.</li> <li>• For Disk Group locks, the name of the Disk Group is displayed.</li> <li>• For process, the type of process is displayed.</li> </ul>

To remove a lock, select a row and click **Remove Selected**. To refresh the list, click **Refresh**.

---

**Note:** Depending on your configuration, you may or may not be able to see and manage the locks associated with other users.

---

For information on the **Checkouts** tabs, see the EDM Services documentation.

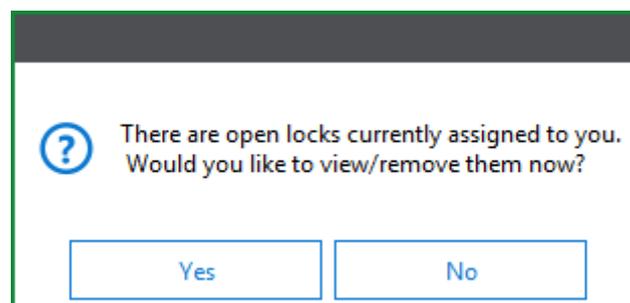
## Document Locks

When working in OnBase, you may see a message saying that the document you want to view or retrieve has a "lock" on it. There are several types of these locks, including:

- Locks caused by the system not closing properly in a previous session.
- Locks caused when trying to modify a document or its Keyword Values if the document is currently in use by another user or by you from a previous session.

See [Keyword Locking on page 310](#) for more information.

If OnBase closes unexpectedly while a document is being modified, the next time OnBase is launched, the following dialog box will prompt you to view or remove any currently open locks assigned to you:



Clicking **Yes** will open the **Manage Locks** dialog box. Clicking **No** will close the dialog box and continue to open OnBase. The **Manage Locks** dialog can be accessed at a later time.

Any user can view a “locked” document, but only the first user can modify it. When the first user is finished viewing or modifying a document, the document is “unlocked” automatically.

---

**Caution:** Removing locks when a document is currently being accessed by a user may cause document changes to be lost. Locks should only be removed if the user’s session is closed and the lock remains.

---

---

**Note:** Image documents are locked if opened by a user with the **Save Rotation** User Group privilege.

---

## Keyword Locking

To preserve data integrity, OnBase protects against situations where multiple users can change a document’s Keyword Values at the same time. A document is rendered as read-only for additional users viewing the document if:

- The initial user accesses a document’s Keyword Values from the **Add/Modify Keywords** pane.
- The initial user accesses a document’s Keyword Values from the **Re-Index** pane.
- The initial user opens the document in any viewer.

When a user accesses a document’s Keyword Values from the **Add/Modify Keywords** or **Re-Index** panes, OnBase locks the values so that only the user who accessed them first can modify them. If any other users attempt to access the document’s Keyword Values, the Keyword Values will be read-only, and the users will be unable to modify them. When the first user closes the document, the lock is released, and other users can modify the document’s Keyword Values.

Documents are also locked when opened. For example, Keyword Values are locked when a user opens an E-Form. Because Keyword Values can be edited on the E-Form itself, the lock is created when a user opens the E-Form.

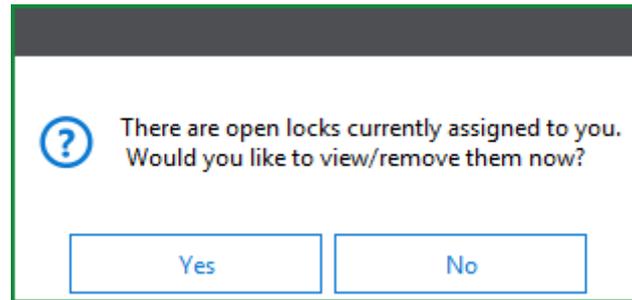
## Disk Group Locks

A Disk Group lock can occur in OnBase when modifying Disk Group configuration in the OnBase Configuration module.

## Process Locks

A process lock occurs if a process is configured for printing, indexing, committing, purging, platter management, re-indexing, caching, or document management. The process lock is removed when the process is finished.

If OnBase closes unexpectedly while a Workflow process is occurring, the next time OnBase is launched, the following dialog box will prompt you to view or remove any abandoned Workflow process locks assigned to you:



Clicking **Yes** will open the **Manage Locks** dialog box. Clicking **No** will close the dialog box and continue to open OnBase. The **Manage Locks** dialog can be accessed at a later time.

If the completed process did not remove a lock, you can manually remove it using the **Manage Locks** dialog box.

Before removing the lock, ensure the user is not using the process.

## User Administration

Users with administrative rights can perform user administration from the **Users** layout. For rights required to access this context, see the following topic, [Required Administrative Rights](#) on page 311.

### Required Administrative Rights

To open the **Users** layout, you must have one of the following:

- User Account Admin configuration right
- User Update Admin configuration right
- Password Admin configuration right

Each of these rights provides access to different options in the **Users** layout, as shown in the following table:

User Account Admin	User Update Admin	Password Admin
Lock Account Unlock Account Reset Password Security Keywords Delete User Create User	Lock Account Unlock Account Reset Password Security Keywords	Unlock Account Reset Password

Additionally, the **Usergroup security** configuration right is required to enable the **User Groups** button in the **Users** layout.

For more information about these rights, see the OnBase Configuration help.

## User Administration Overview

If you have rights to user administration activities, then you can access the **Users** layout.

To access the **Users** layout, click the Unity Client's Application button. Then, select **Administration | User Administration**.

The **Users** layout is displayed:

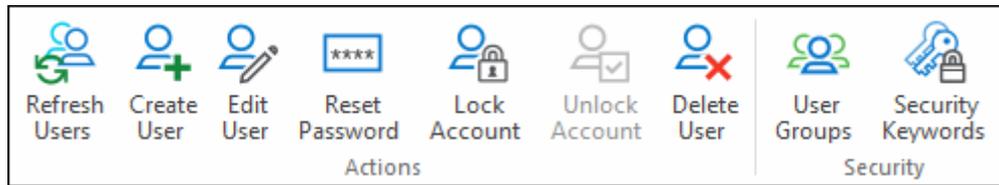
ID	Name	Real Name	Email	Last Logon	Disabled
1	ADMINISTRATOR	Administrator	admin@9secondfoods.com	3/6/2008 6:30 PM	No
101	ANDREW LINCOLN	Andrew Lincoln	andrew.lincoln@9secondfoods.com	5/3/2017 1:22 PM	No
103	JANE HARPER	Jane Harper	jane.harper@9secondfoods.com	5/3/2017 1:22 PM	No
104	JASON KNIGHT	Jason Knight	jason.knight@9secondfoods.com	5/3/2017 1:22 PM	No
105	JOHN MALLORY	John Mallory	john.mallory@9secondfoods.com	3/10/2008 3:15 PM	No
2	MANAGER	Manager	manager@9secondfoods.com	5/3/2017 1:21 PM	No
106	MANAGER2	Assistant Manager	assistant.manager@9secondfoods.com	3/6/2008 6:30 PM	No
102	MARY NELSON	Mary Nelson	mary.nelson@9secondfoods.com	5/3/2017 1:22 PM	No

The **Users** layout includes the following:

Column	Description
<b>ID</b>	The number assigned to the OnBase user.
<b>Name</b>	The OnBase user name.
<b>Real Name</b>	The OnBase user's real name.
<b>Email</b>	The OnBase user's email address.
<b>Last Logon</b>	The date when the user last logged in to OnBase.
<b>Institution</b>	The user's institution. <hr/> <b>Note:</b> This column is only available when using an institutional database. <hr/>
<b>Disabled</b>	Shows whether the user is disabled. <b>Yes</b> indicates that the user is disabled. <b>No</b> indicates that the user is not disabled.

The **Users** layout includes the **Users** tab. The buttons that are available on this tab depend on your user rights. For more information on this tab, see [Users Tab on page 313](#).

## Users Tab



The **Users** tab allows you to manage OnBase users.

Actions	Description
	<b>Refresh Users</b> refreshes the list of users in the <b>Users</b> layout.
	<b>Create User</b> allows you to create and configure a new user. See <a href="#">Creating Users on page 314</a> for more information.
	<b>Edit User</b> allows you to add or modify the user's <b>Real Name</b> or <b>Email Address</b> . <b>Note:</b> You can also double-click a user to modify the user's <b>Real Name</b> or <b>Email Address</b> . See <a href="#">Editing Users on page 316</a> for more information.
	<b>Reset Password</b> allows you to reset the password for the selected user. See <a href="#">Resetting User Passwords on page 316</a> for more information.
	<b>Lock Account</b> allows you to lock a user account. See <a href="#">Locking and Unlocking Users on page 317</a> for more information.
	<b>Unlock Account</b> allows you to unlock a user that was locked. See <a href="#">Locking and Unlocking Users on page 317</a> for more information.

Actions	Description
	<p><b>Delete User</b> allows you to delete a user. See <a href="#">Deleting Users on page 318</a> for more information.</p>

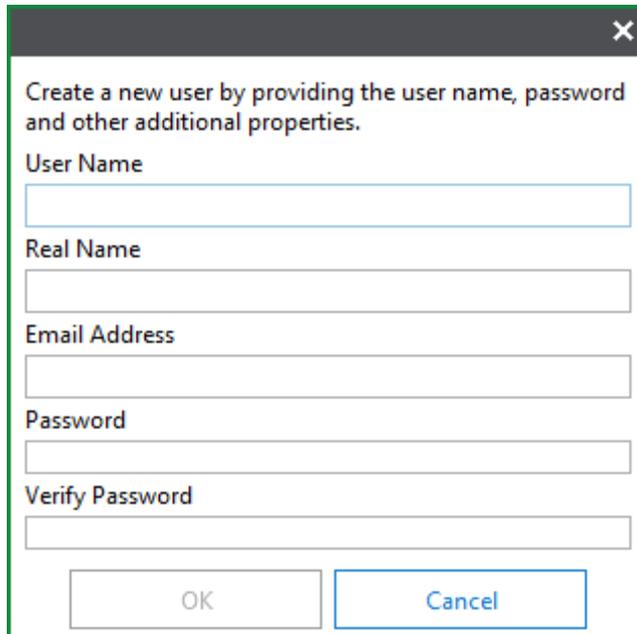
Security	Description
	<p><b>User Groups</b> allows you to configure the User Group assignment for the selected user. See <a href="#">Changing User Group Assignments on page 318</a> for more information.</p>
	<p><b>Security Keywords</b> allows you to configure Security Keywords for the selected user. See <a href="#">Assigning Security Keywords to Users on page 320</a> for more information.</p>

## Creating Users

As a user administrator, you can create a new OnBase user at any time, provided you can supply the user name and password to log the new user in. You can provide additional information about the user at the time of creation, or at any time thereafter.

1. Ensure you are in the **Users** layout.
2. Click **Create User**.

- The following dialog box is displayed:



Create a new user by providing the user name, password and other additional properties.

User Name

Real Name

Email Address

Password

Verify Password

OK Cancel

- In the **User Name** field, type the user name that the new user will log on to OnBase with.
- In the **Real Name** field, type the real name of the new user (or any other text string you want to use for identification).
- (Optional) In the **Email Address** field, type the user's email address.
- In the **Password** field, type the password for the user name.
- Type the same password in the **Verify Password** field.
- If you are using an institutional database, select an institution from the **Institution** drop-down list.
- Click **OK**. The user is created.

The new user will automatically be selected in the Users list.

---

**Note:** If OnBase is unable to create the new user, it will display a dialog box with an error message explaining the reason for failure (e.g., the User Password does not satisfy the password requirements of your OnBase solution). You can resolve the problem by editing the field and then clicking **OK** again.

---

## Editing Users

Users can be edited by a user administrator. To change a user's **Real Name** or **Email Address**:

1. Click the **Edit User** button.



---

**Note:** You can also double-click a user to modify the user's **Real Name** or **Email Address**.

---

2. Modify the user's **Real Name** and/or **Email Address** in the **Edit User** dialog box.

A dialog box titled "Modify value(s) below to update the corresponding property." It contains two text input fields: "Real Name" with the value "Andrew Lincoln" and "Email Address" with the value "andrew.lincoln@9secondfoods.com". At the bottom are "OK" and "Cancel" buttons.

Modify value(s) below to update the corresponding property.

Real Name  
Andrew Lincoln

Email Address  
andrew.lincoln@9secondfoods.com

OK Cancel

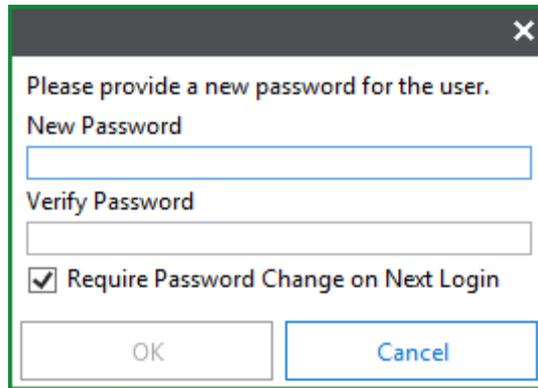
3. Click **OK** to save your changes and to close the Edit User dialog box. Click **Cancel** to close the Edit User dialog box without saving your changes.

## Resetting User Passwords

You can change, or reset, the login password for a user at any time.

1. Ensure you are in the **Users** layout.
2. Click **Reset Password**.

3. The following dialog box is displayed:



The dialog box contains the following elements:

- Title: Please provide a new password for the user.
- Field: New Password (text input)
- Field: Verify Password (text input)
- Checkbox:  Require Password Change on Next Login
- Buttons: OK, Cancel

4. Type a new password in the **New Password** field.
5. Type the same password in the **Verify Password** field.
6. Select **Require Password Change on Next Login** to require a password change the next time the user logs in.
7. Click **OK**.
8. The user's password is changed. A confirmation message is displayed near the bottom of the screen.

## Locking and Unlocking Users

When a user account is locked, the account cannot be accessed. In other words, no one can use that account to log in to the system. User accounts may be locked automatically by the system for a variety of reasons; a common reason is that the user repeatedly attempts to log in with the wrong password.

You can lock or unlock the account of any user for whom you have administrative responsibilities.

To lock a user account:

1. Ensure you are in the **Users** layout.
2. Select a user.
3. Click **Lock Account**.
4. The system locks the selected account.

To unlock a user account:

1. Ensure you are in the **Users** layout.
2. Select a user.
3. Click **Unlock Account**.
4. The system unlocks the selected account.

## Deleting Users

You can delete existing users from the OnBase at any time. Once deleted, a user can no longer log on to OnBase.

To delete a user:

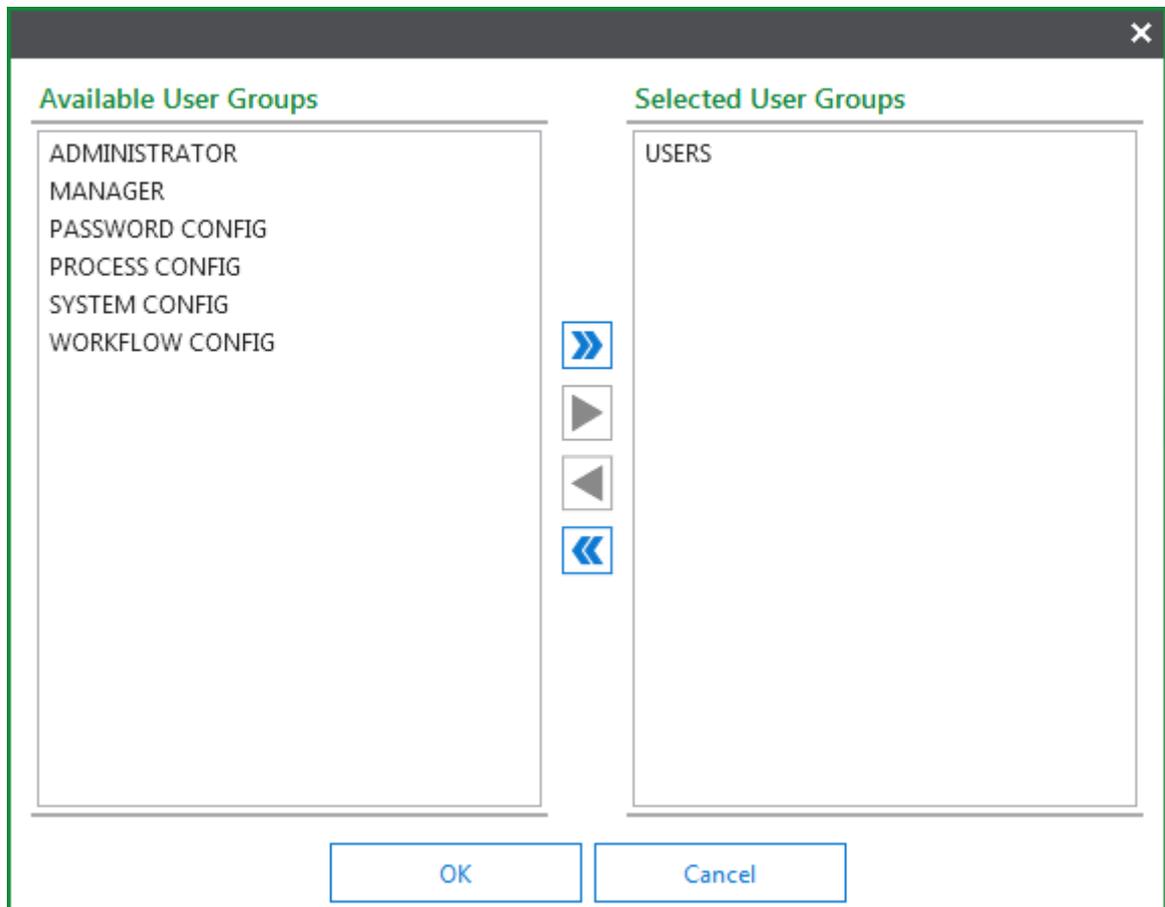
1. Ensure you are in the **Users** layout.
2. Select a user.
3. Click **Delete User**.
4. You are prompted to confirm that you want to delete the selected user. Click **Yes** to delete the user. Click **No** to retain the user.
5. OnBase deletes the user and displays a confirmation message near the bottom of the screen.

## Changing User Group Assignments

User Groups are configured by the system administrator and users are typically assigned to User Groups in the Configuration module. With the appropriate rights, you can also assign users to User Groups.

1. Ensure you are in the **Users** layout.
2. Select a user.
3. Click **User Groups**.

4. The following screen is displayed:



The **Available User Groups** list displays the User Group(s) to which the user does not belong. The **Selected User Groups** list displays the User Group(s) to which the user belongs.

5. To add a user to a group:
- Double-click the group name in the **Available User Groups** list; or
  - Select the group name in the **Available User Groups** list and click **Add Selected Items**.



- Click **Add All Items** to add all user groups to the **Selected User Groups** list.



6. To remove a user from a group:
- Double-click the group name in the **Selected User Groups** list

- Select the group name in the **Selected User Groups** list and click **Remove Selected Items**.



- Click **Remove All Items** to remove all user groups from the **Selected User Groups** list.



7. When you are finished changing User Group assignments, click **OK**. The system makes the specified changes, and displays a confirmation message near the bottom of the screen.

## Assigning Security Keywords to Users

Normally, the ability to retrieve documents is determined by the Document Types that a user's user group is granted retrieval rights to. In other words, a user can retrieve all documents whose Document Types can be retrieved by any user group that the user belongs to.

You can use Security Keywords to define specific limitations on an individual's document retrieval rights. Security Keywords restrict retrieval by Keywords. For example, an employee could be restricted to retrieving documents from the Human Resources department. Furthermore, that same clerk could be prevented from retrieving documents related to the Accounting department.

When you assign a Security Keyword, you must specify whether the document Keyword Value is to be **Equal** or **Not Equal** to the Security Keyword Value.

- **Equal** means that the user can retrieve only documents with the specified Keyword Value.
- **Not Equal** means that the user can retrieve all documents except those with the specified Keyword Value.

---

**Note:** Security Keywords do not enable a user to retrieve documents that the user does not have user rights to retrieve. For example, if the user does not have retrieval rights to Human Resources documents, then that user cannot retrieve those documents no matter what Security Keywords are assigned.

---

Your system administrator determines which Keyword Types can be used for Security Keywords, and may also establish other validation rules.

Once you have created Security Keywords for a user, you can add new ones or delete existing ones at any time.

To assign Security Keywords:

1. Ensure you are in the **Users** layout.
2. Select a user.
3. Click **Security Keywords**.

4. The following window is displayed:

Apply one or more keyword values to restrict access to documents for this user.

**Keyword Types**

[Drop-down menu]

**Condition**

Equal  
 Not Equal

**Keyword Value**

Static Value  User Name

<Please select a keyword type first.> [Add]

**Security Keywords**

[OK] [Cancel]

5. From the **Keyword Types** drop-down list, select the Keyword Type to be used for security.
6. In **Condition**, select one of the following:
- **Equal** enables the user to retrieve documents whose Keywords match the specified value.
  - **Not Equal** prevents the user from retrieving documents whose Keywords match the specified value.
7. In **Keyword Value**, select one of the following:
- **Static Value** - Select to enter an unchanging value for this Security Keyword.
  - **Username** - Select to configure this Security Keyword to restrict documents for each user based on that user's personal user name. **Username** is only available if the selected Keyword Type is alphanumeric.
8. If you selected **Static Value**, type the Keyword Value in the **Keyword Value** field.

---

**Note:** The Keyword Value is limited to the allowable values for the Keyword Type previously configured in the Keyword Type Settings dialog box.

---

If you selected **Username**, the **Keyword Value** field is automatically populated with << **USERNAME** >>.

9. Click **Add**. OnBase displays the added value in the **Security Keywords** list.

10. For each additional Security Keyword to be assigned to the current user, repeat steps 5-9.

The following example illustrates what OnBase displays after several Security Keywords have been added for a user:

The screenshot shows a dialog box titled "Apply one or more keyword values to restrict access to documents for this user." The dialog is divided into several sections:

- Keyword Types:** A dropdown menu currently set to "Description".
- Condition:** Two radio buttons: "Equal" (unselected) and "Not Equal" (selected).
- Keyword Value:** Two radio buttons: "Static Value" (selected) and "User Name" (unselected). Below these is a text input field and an "Add" button.
- Security Keywords:** A list of assigned keywords. Two are shown:
  - ✗ **Description** Equal **Human Resources**
  - ✗ **Description** Not Equal **Accounting**

At the bottom of the dialog are "OK" and "Cancel" buttons.

To delete a Security Keyword, click the **X** to the left of the Security Keyword.

11. When you finish assigning Security Keywords to this user, click **OK**. The system saves the Security Keyword assignments and displays a confirmation message near the bottom of the screen.

The Security Keywords will be in effect the next time the user logs into the system.

## User Option Policy Administration

**Note:** The **User Management** product right and the **Usergroup Security** configuration right are needed to view the User Option Policy Administration layout. To assign a User Option Policy to a User Group, the **User Group Configuration** right is needed. For additional information, see the **System Administration** module reference guide.

User Option Policies allow an Administrator to set and enforce User Options for designated User Groups. The User Options that can be set include the User Options accessed by clicking **User Options** in the **File** menu, the users' **Home Layout**, and the **Thumbnail Settings** found in the Document Separation layout. User Option settings are applicable only in the Unity Client.

---

**Note:** For more information on User Options, see [User Options on page 46](#). For more information on Document Separation, see [Separating Image and PDF Documents on page 181](#).

---

User Options can be **enforced**, which means that they cannot be changed by users. Or, they may be **non-enforced**, which means that they can be changed by users.

If a user has already adjusted a User Option for themselves, the User Option Policy overrides that setting.

Changes made to a User Option Policy take effect upon user login.

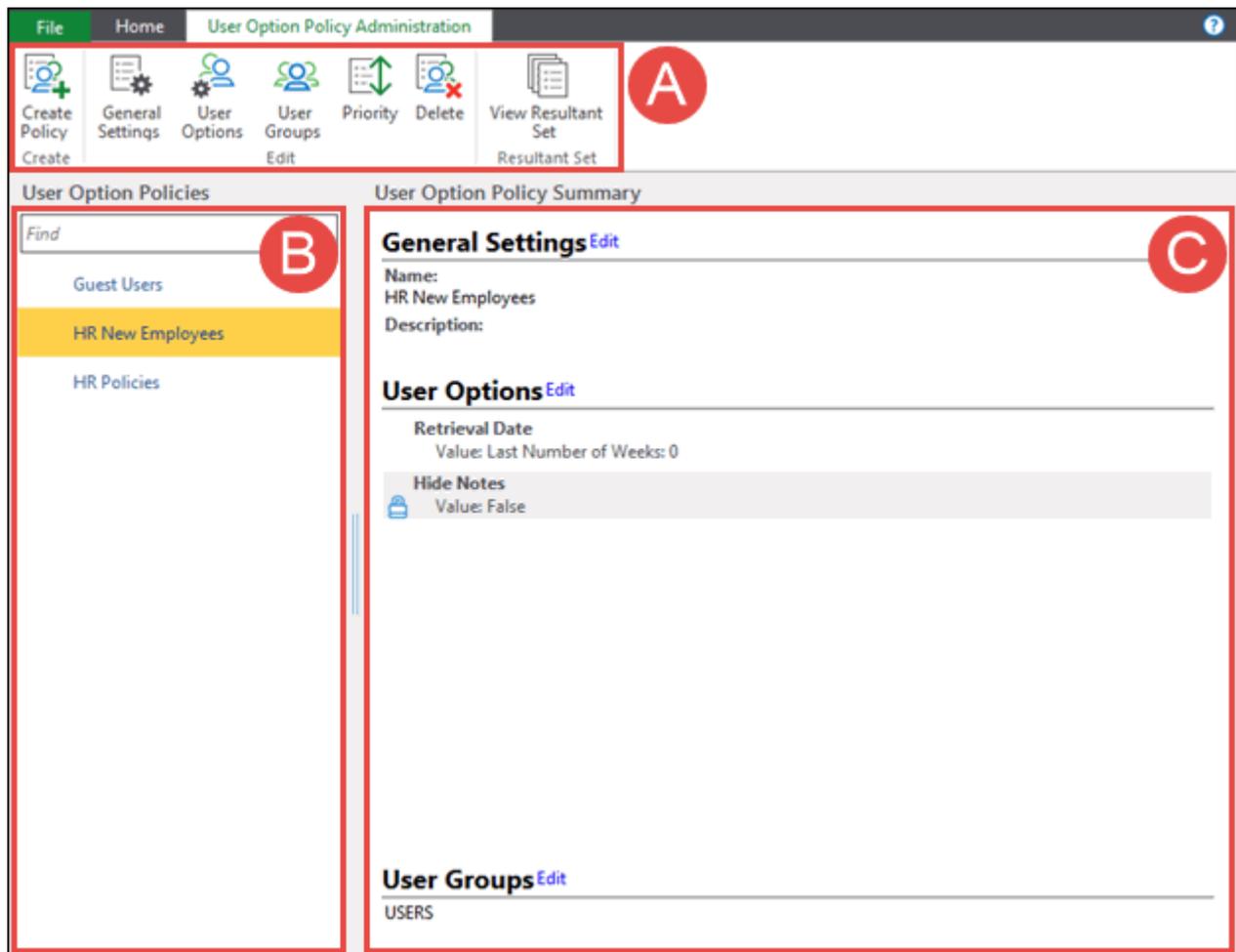
---

**Note:** If an Administrator is part of a User Group that has a User Option enforced by a User Option Policy, the User Option in question will not be enforced for the Administrator when working within the User Option Policy layout. This is to ensure that an Administrator who configures User Option Policies and is also part of a User Option Policy is not locked out of the modification of User Option Policies.

---

**Example of a User Option Policy:** A company makes use of the Notes feature within OnBase. Important information concerning hiring decisions is often conveyed within notes placed on resume documents. It is crucial that all members of the HR User Group view all notes placed on documents or they may miss information concerning a potential employee. So, to ensure that all members of the HR User Group are shown notes immediately upon opening a document, the **Hide Notes** User Option can be enforced to be set as false for the HR User Group. Users within this User Group will be unable to select the option to hide notes themselves in the **User Options** dialog since it is enforced by the policy.

The User Option Policy Administration layout is accessed by clicking **Administration | User Option Policy Administration** in the File Menu.



In the above diagram, the area labeled A is the ribbon menu. The area labeled B is the list of configured User Option Policies, which are organized alphabetically. The area labeled C is the **User Option Policy Summary**, which displays the **General Settings**, configured **User Options**, and assigned **User Groups** for the selected User Option Policy.

## Adding a User Option Policy

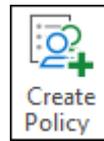
To create a new User Option Policy:

1. In the **File** menu, click **Administration | User Option Policy Administration**:



2. The **User Option Policy Administration** layout is opened:

3. In the **New** ribbon menu group, click **Create Policy**:



4. The **General Settings** dialog is opened:

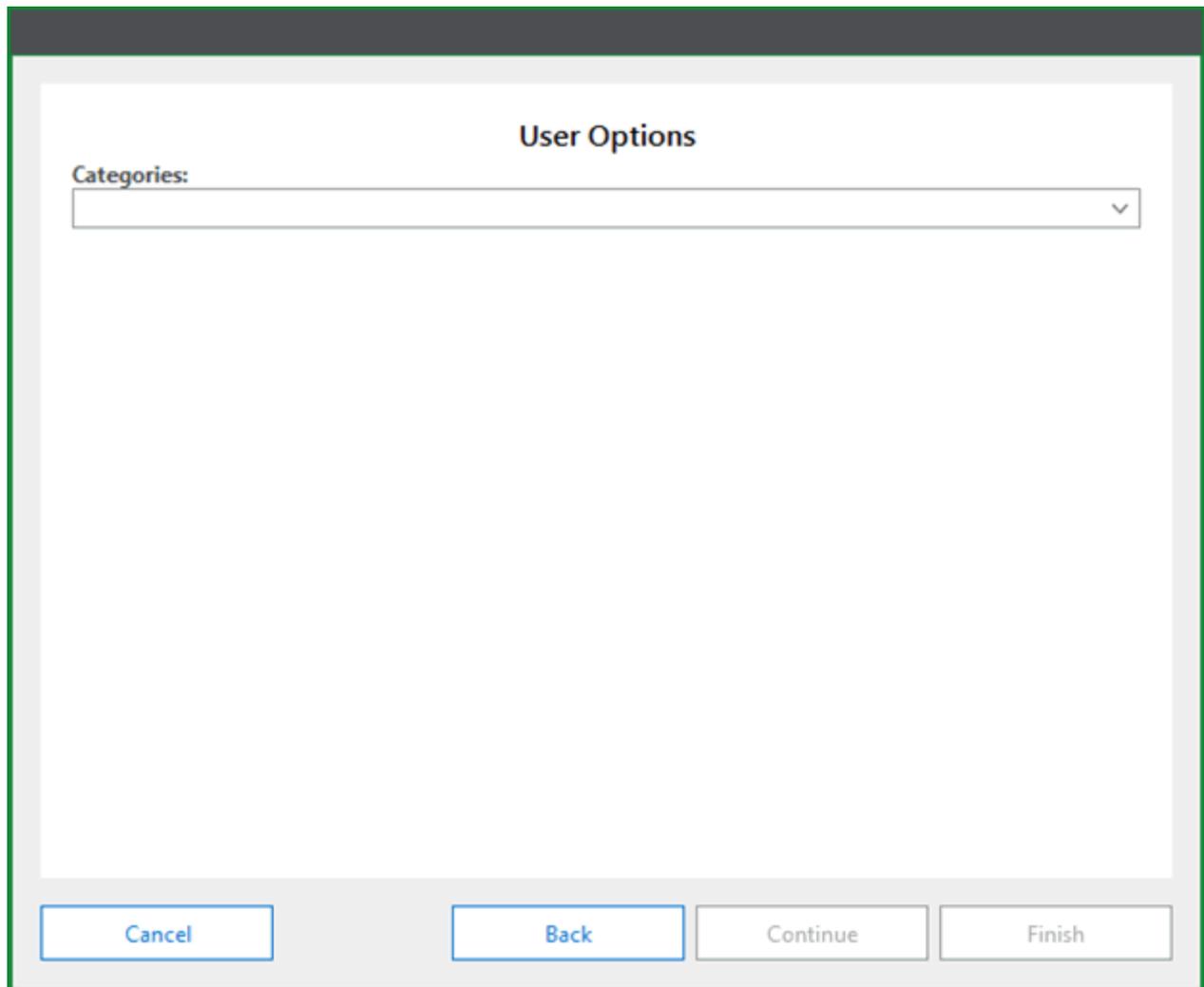
A screenshot of a "General Settings" dialog box. The dialog has a white background and a grey border. At the top center, the title "General Settings" is displayed. Below the title, there are two text input fields. The first field is labeled "Name:" with a red asterisk indicating it is required. The second field is labeled "Description:". At the bottom of the dialog, there are four buttons: "Cancel", "Back", "Continue", and "Finish". The "Continue" button is highlighted with a blue border.

Enter a Name for the policy in the **Name** field. The name must be unique from existing User Option Policy names.

Enter a **Description** for the policy, if desired.

5. Click **Continue**.

6. The **User Options** dialog is displayed:



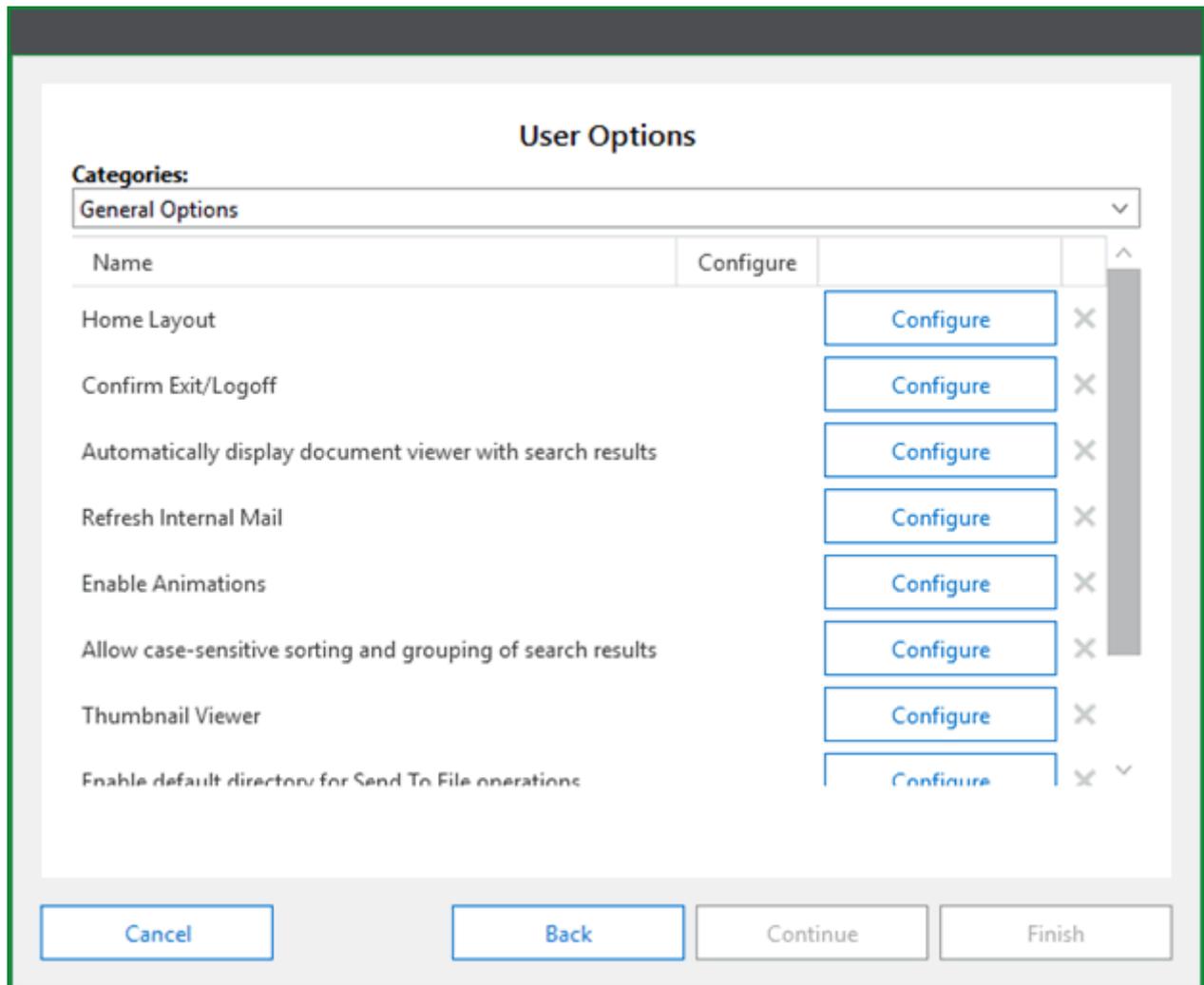
Select a User Options category from the **Categories** drop-down select list. Options include:

- **General Options**
- **Document Import**
- **Retrieval Date Options**
- **Document**
- **Revision Control**
- **Workflow**
- **Printing**
- **WorkView**
- **Document Separation**
- **Signatures**

- **Imaging**
- **Plan Review Viewer**

**Note:** For more information on these categories, refer to [User Options](#) on page 46.

7. After a category has been selected, the available settings for each category will be listed below the **Category** drop-down:



These settings can be reordered by clicking the **Name** or **Configure** column headings. Click the **Configure** button next to the setting you would like to configure:

8. The **Edit User Option [Setting Name]** dialog is displayed:

The screenshot shows a dialog box titled "Edit User Option" with the subtitle "Home Layout". At the top left, there is a checkbox labeled "Enforce User Option" which is currently unchecked. Below this is a text input field labeled "Description:". Underneath the description field is a dropdown menu labeled "Home Layout:" with "Home" selected. At the bottom of the dialog, there are four buttons: "Cancel", "Back", "Continue", and "Finish".

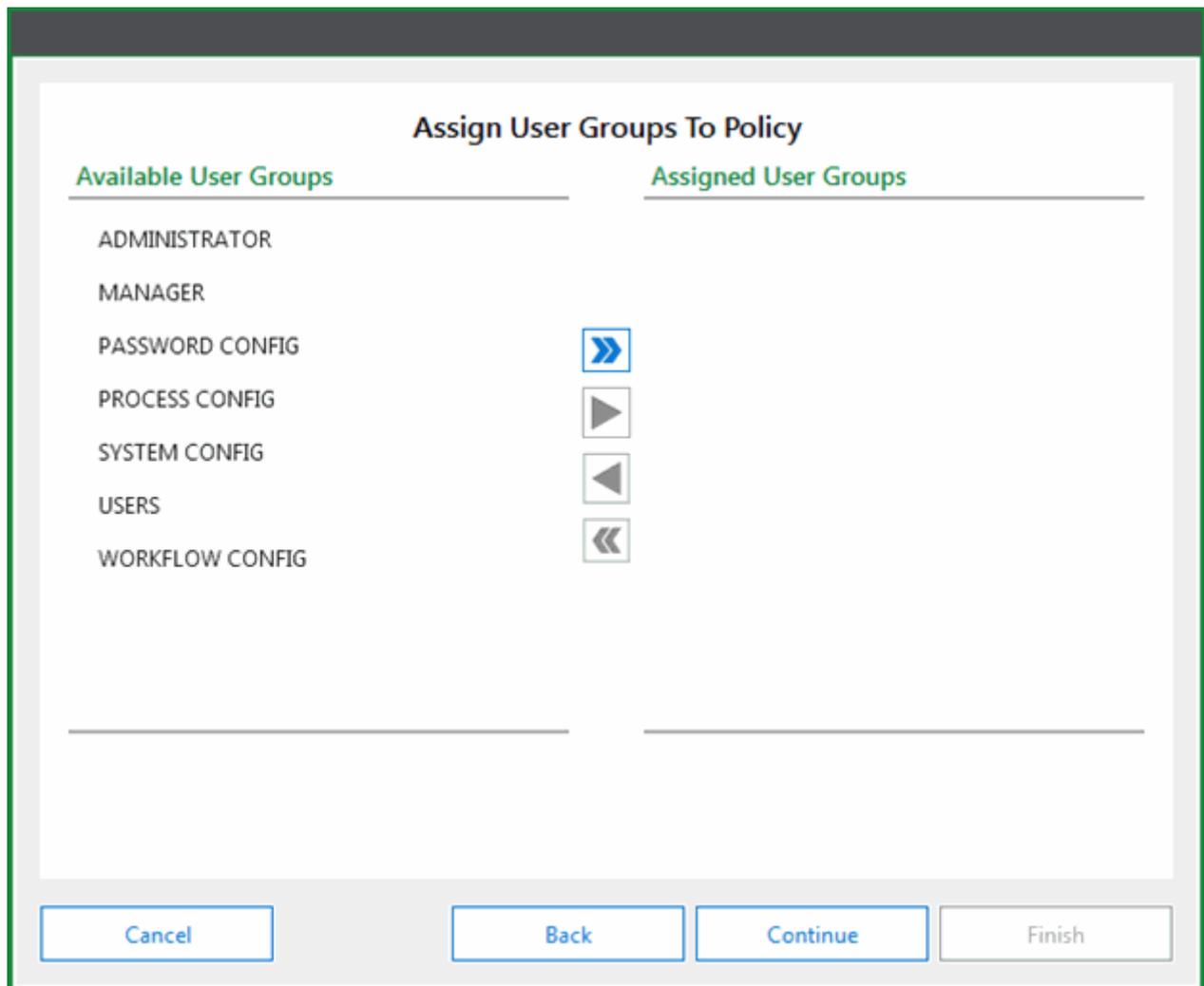
Configure the setting as necessary.

If **Enforce User Option** is selected, that User Option setting will not be changeable by users. If **Enforce User Option** is not selected, user will be able to adjust that setting.

Enter a **Description**, if desired.

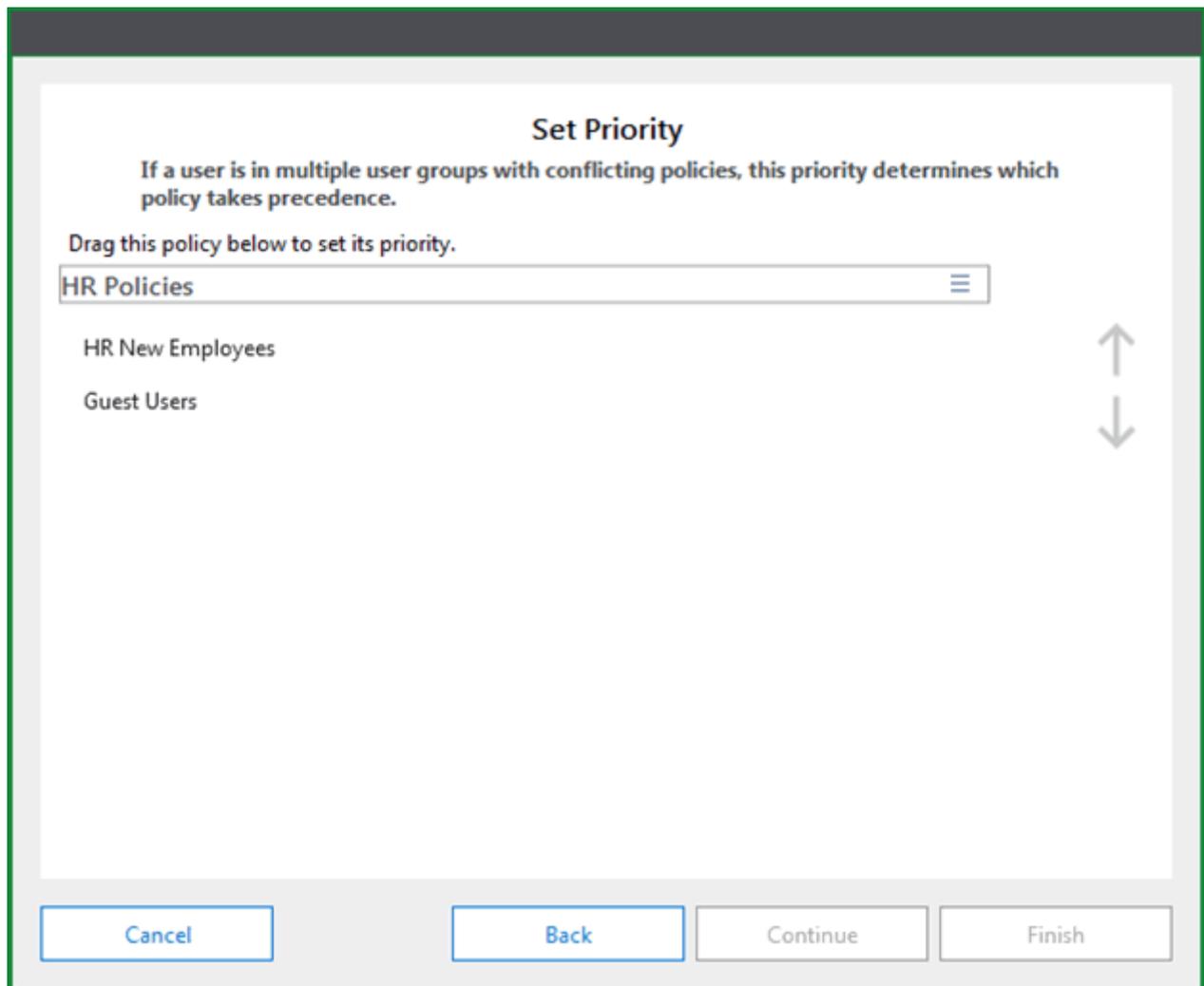
9. Configure additional User Options as necessary. Complete steps 6-8 as needed for each option.

10. When you are finished configuring User Options, click **Continue**. The **Assign User Groups to Policy** dialog is displayed:



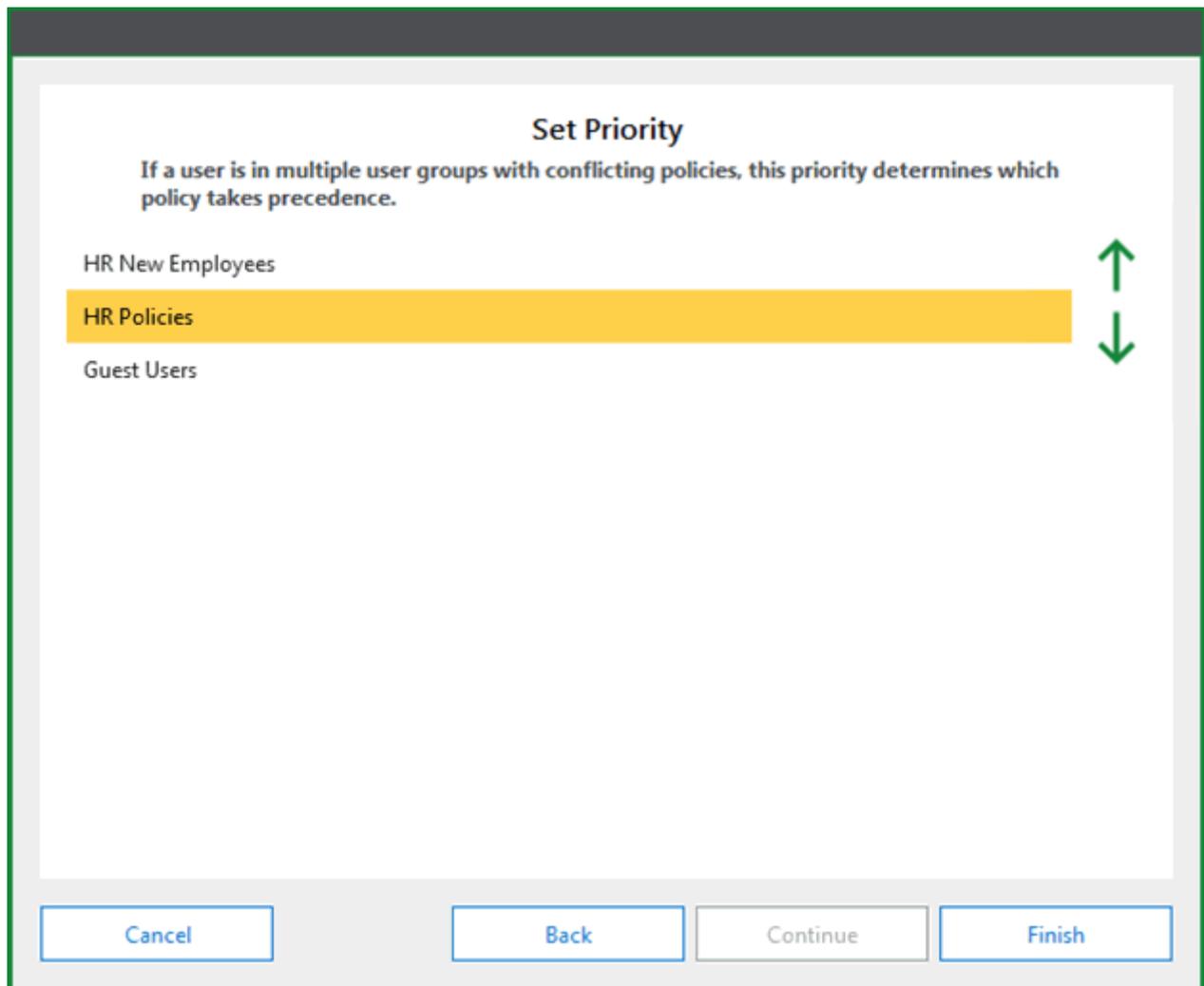
11. Move a User Group from the **Available User Groups** column to the **Assigned User Groups** column to assign a User Group to the policy. User Groups can be moved from one column to another by double-clicking them or by using the arrow control buttons.

12. When you are finished assigning User Groups to the policy, click **Continue**. The **Set Priority** dialog is displayed:



The name of the policy is featured in bold above the list of existing policies. Click and drag the new policy to a spot in the priority order list. The placement of the policy determines which user option takes precedence when applied to a user. This feature helps determine which User Option Policy is applied when a user is assigned to more than one User Option Policy with conflicting options configured.

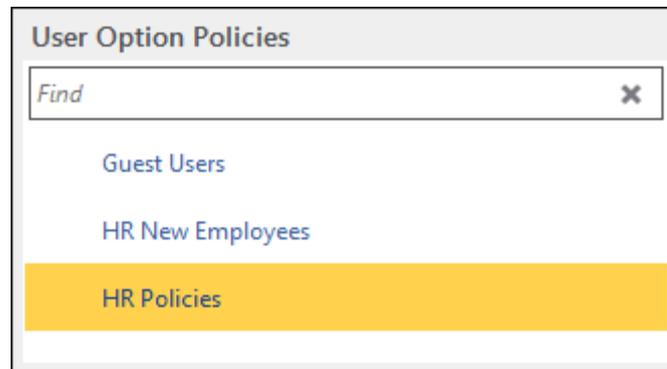
- Once the new policy has been placed in the list, you can reorder the policies using the Up and Down arrows on the left:



In the above example, **HR New Employees** takes precedence before **HR Policies**. **HR Policies** takes precedence above **Guest Users**.

- Click **Finish** when you are done adjusting the policy.

15. The new User Option Policies is added to the **User Options Policies** list:



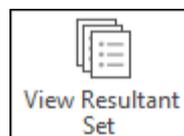
## Viewing the Resultant Set of User Options

After User Group Policies have been created, you can review the settings for each User Group by viewing the **Resultant Set**. The Resultant Set dialog allows you to view which options are configured for each User Group. To view the Resultant Set:

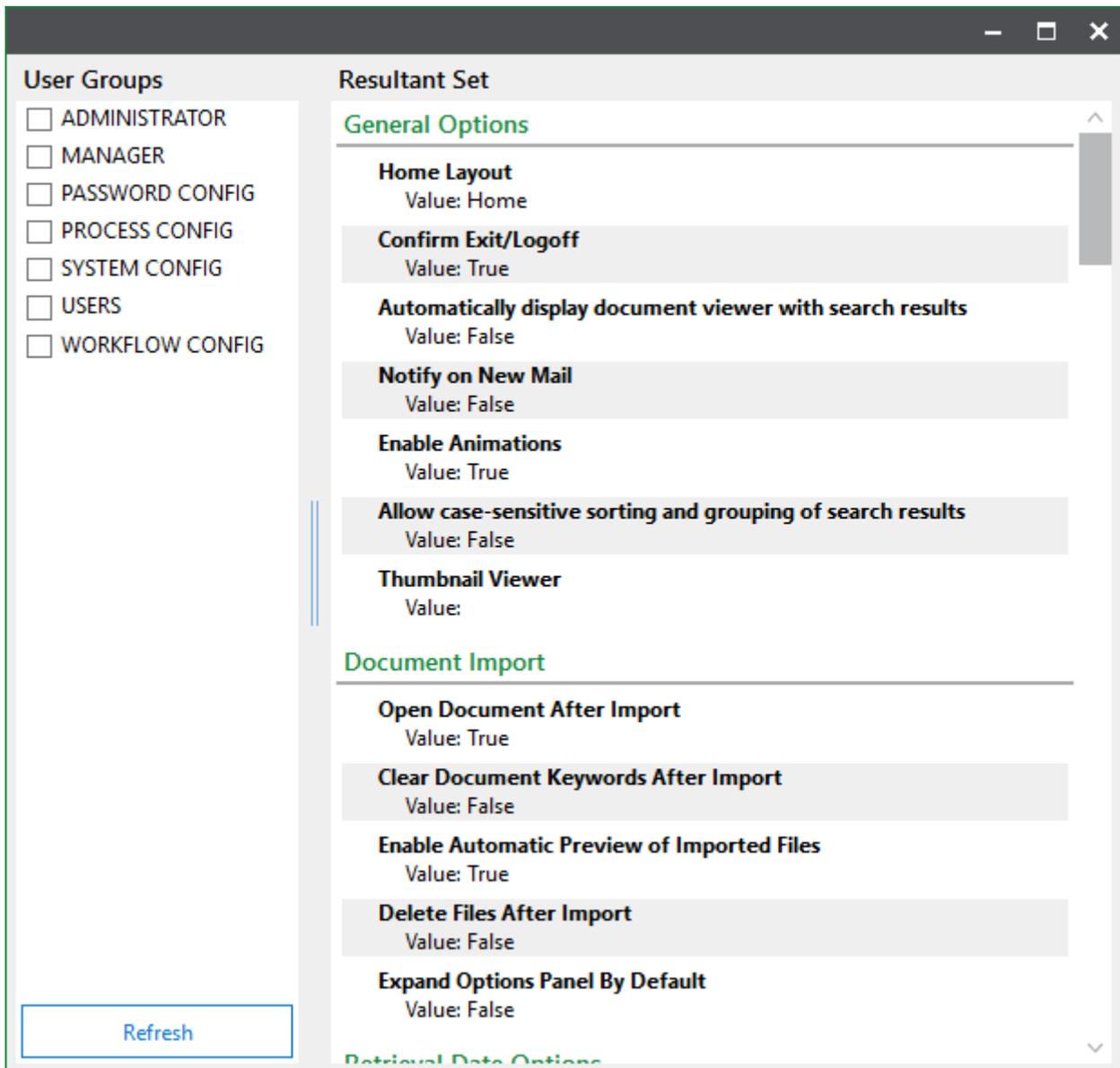
1. In the **File** menu, click **Administration | User Option Policy Administration**:



2. The **User Option Policy Administration** layout is opened. Click the **View Resultant Set** button in the Resultant Set ribbon group:



3. The **Resultant Set** dialog is displayed:



When no User Groups are selected, the settings displayed are the default User Options and their values.

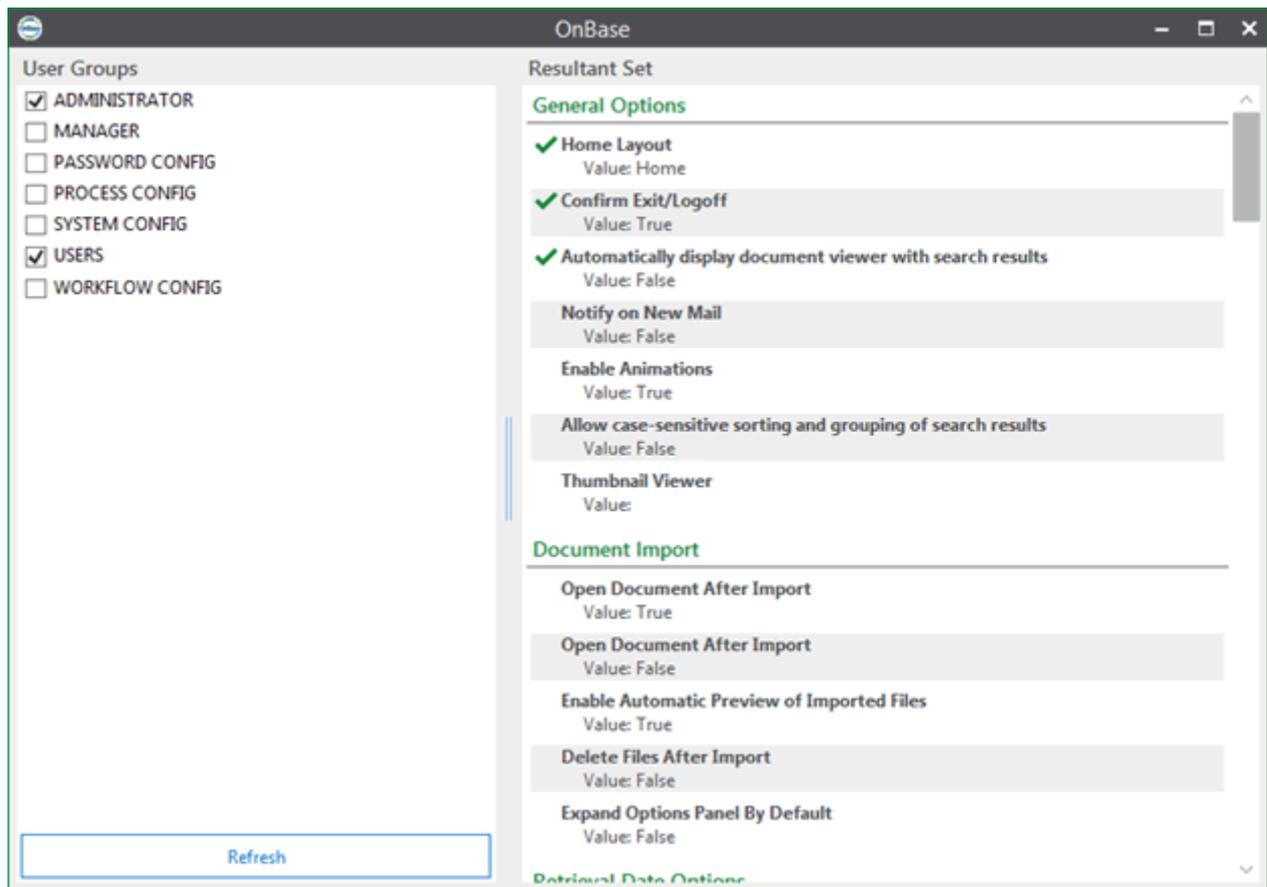
- From the **User Groups** column, select the User Group(s) for which you would like to see the Resultant Set:

**User Groups**

- ADMINISTRATOR
- MANAGER
- PASSWORD CONFIG
- PROCESS CONFIG
- SYSTEM CONFIG
- USERS
- WORKFLOW CONFIG

Refresh

- When the required User Groups have been selected, click **Refresh**. The **Resultant Set** column will display the User Options selected and the values for each User Group:



Values with a green checkmark next to them have been set in a User Option Policy. Values with a lock icon next to them have been set as **Enforced** in a User Option Policy.



- Hover over a green checkmark to see which User Option Policy set the value:



- When you are finished viewing the Resultant Set, close the **Resultant Set** dialog.

## Changing a User Option Policy

User Option Policies can be updated after their creation. Certain aspects of changing the User Option Policy require different methods of editing. This section covers:

- Changing the Name and Description of a User Option Policy on page 336
- Changing the Configured User Options of a User Option Policy on page 338
- Changing the Assigned User Group of a User Option Policy on page 342
- Changing the Priority of a User Option Policy on page 343

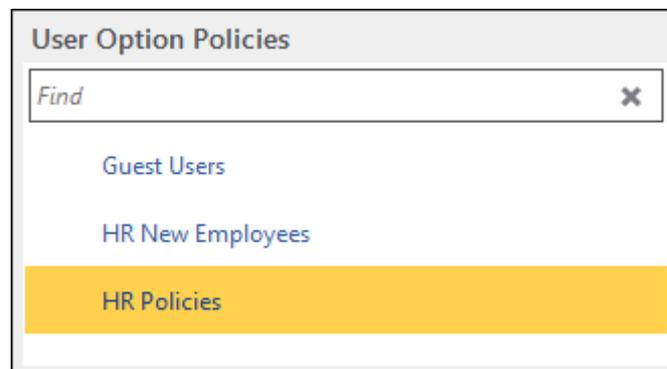
## Changing the Name and Description of a User Option Policy

To change the name or description of a User Option Policy:

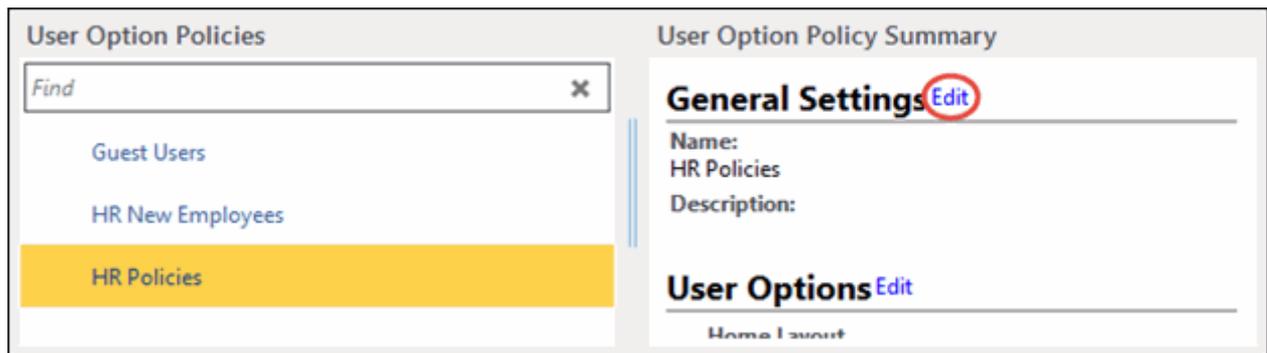
1. In the **File** menu, click **Administration | User Option Policy Administration**:



2. The **User Option Policy Administration** layout is displayed.  
In the **User Options Policies** list, select the User Option Policy you would like to change the name and/or description of:



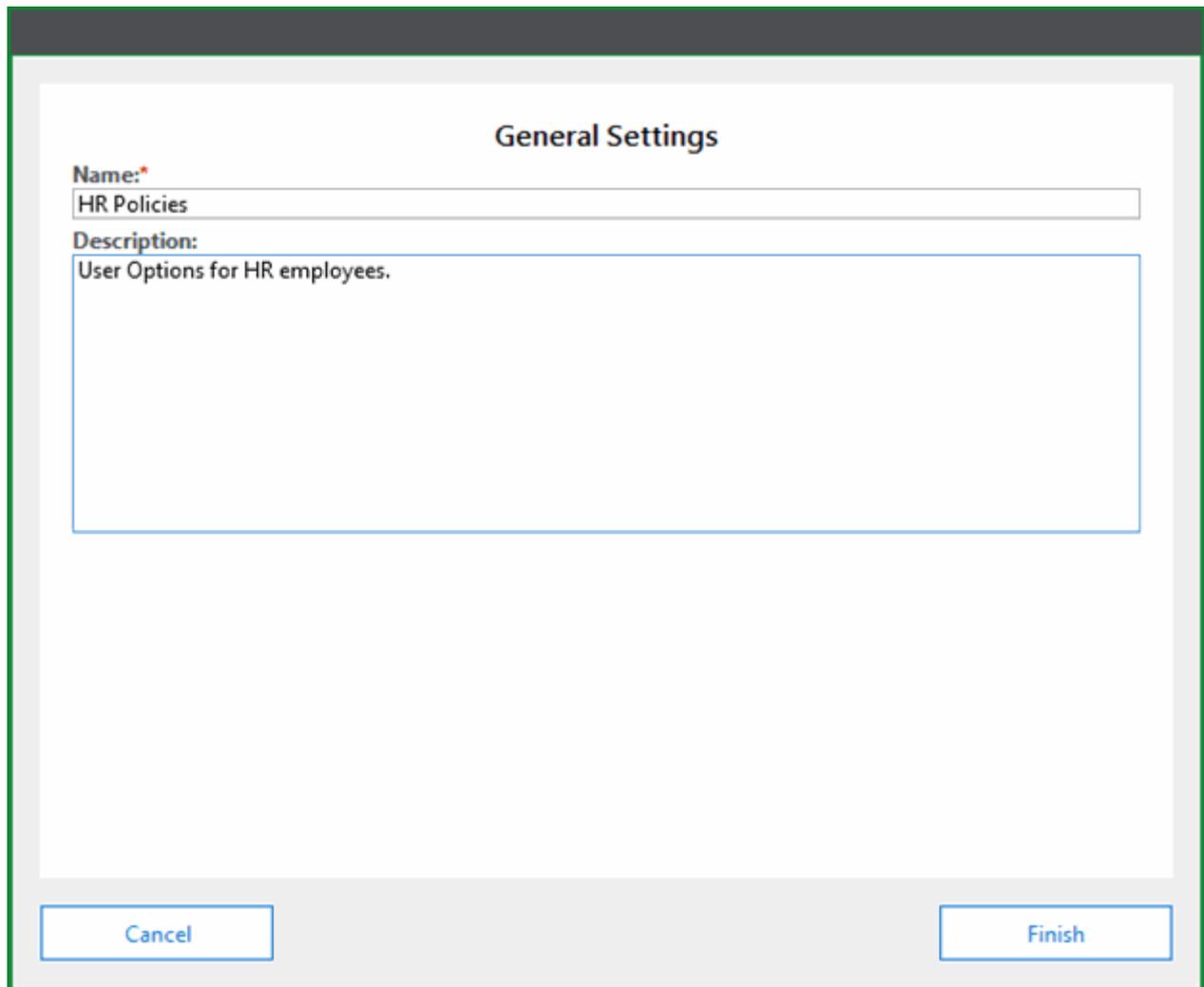
3. In the **User Option Policy Summary** area of the layout, click **Edit** in the **General Settings** section:



Or, you may click the **General Settings** button in the **Edit** ribbon group:



4. The **General Settings** edit dialog is displayed:



The screenshot shows a dialog box titled "General Settings". It has two input fields: "Name:" with the value "HR Policies" and "Description:" with the value "User Options for HR employees.". At the bottom, there are "Cancel" and "Finish" buttons.

Change the **Name** and **Description** as needed.

5. Click **Finish** to apply your changes and to close the **General Settings** dialog.

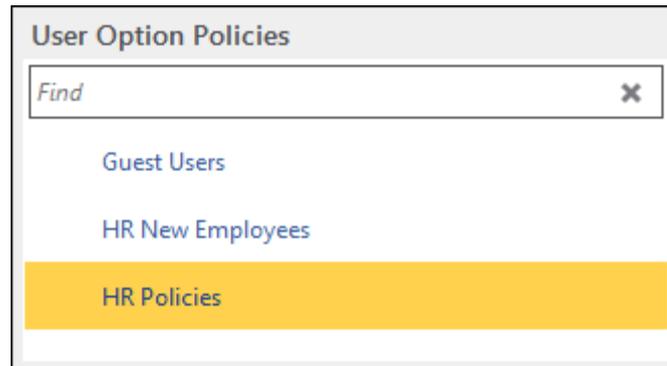
## Changing the Configured User Options of a User Option Policy

To change, add, or remove the User Option settings of a previously configured User Option Policy:

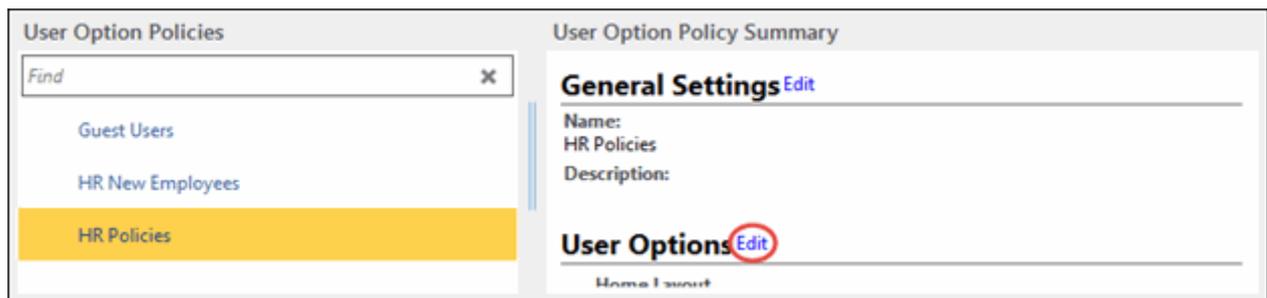
1. In the **File** menu, click **Administration | User Option Policy Administration**:



- The **User Option Policy Administration** layout is opened.  
In the **User Options Policies** list, select the User Option Policy you would like to change the configured User Options of:



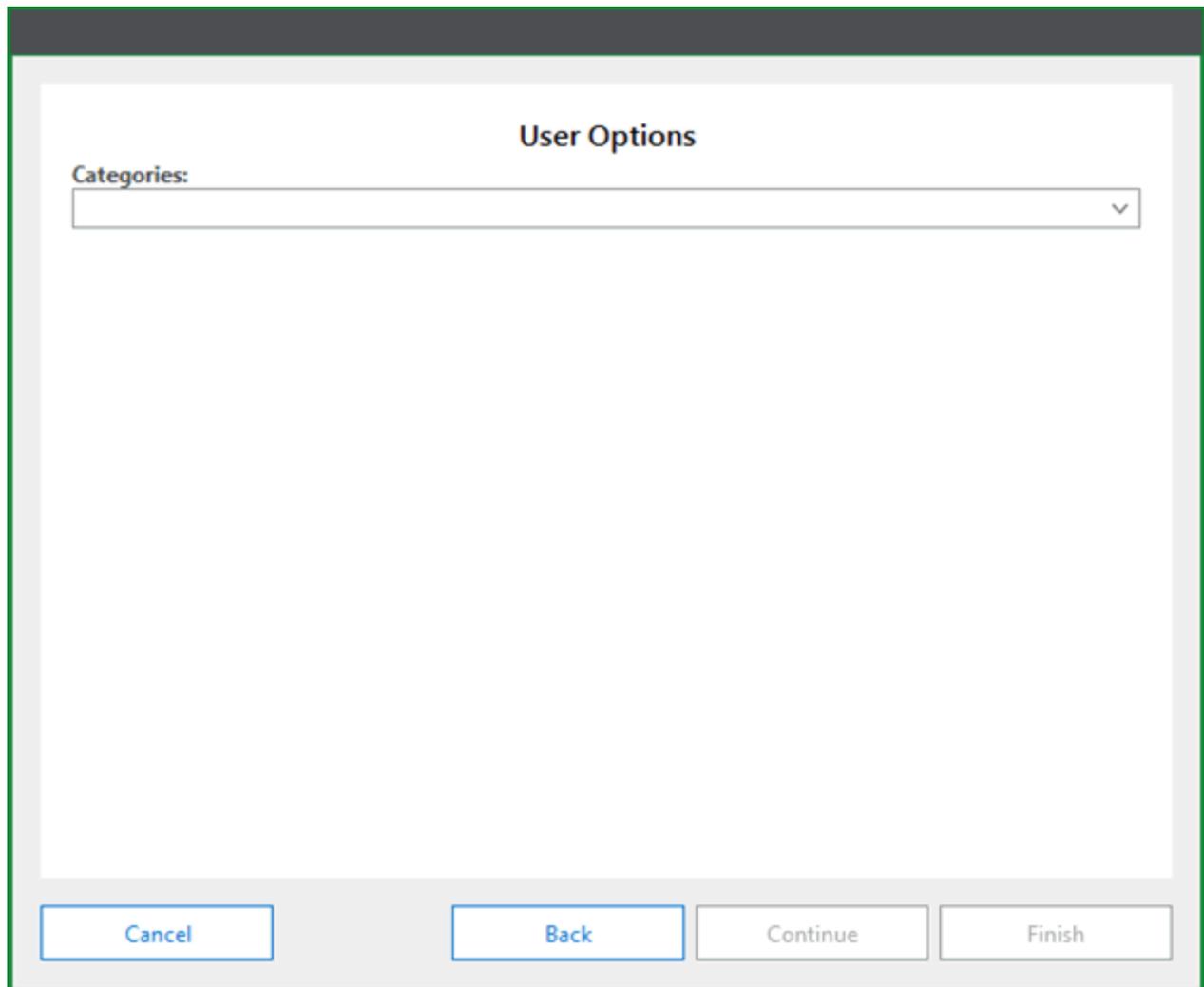
- In the **User Option Policy Summary** area of the layout, click **Edit** in the **User Options** section:



Or, you may click the **User Options** button in the **Edit** ribbon group:

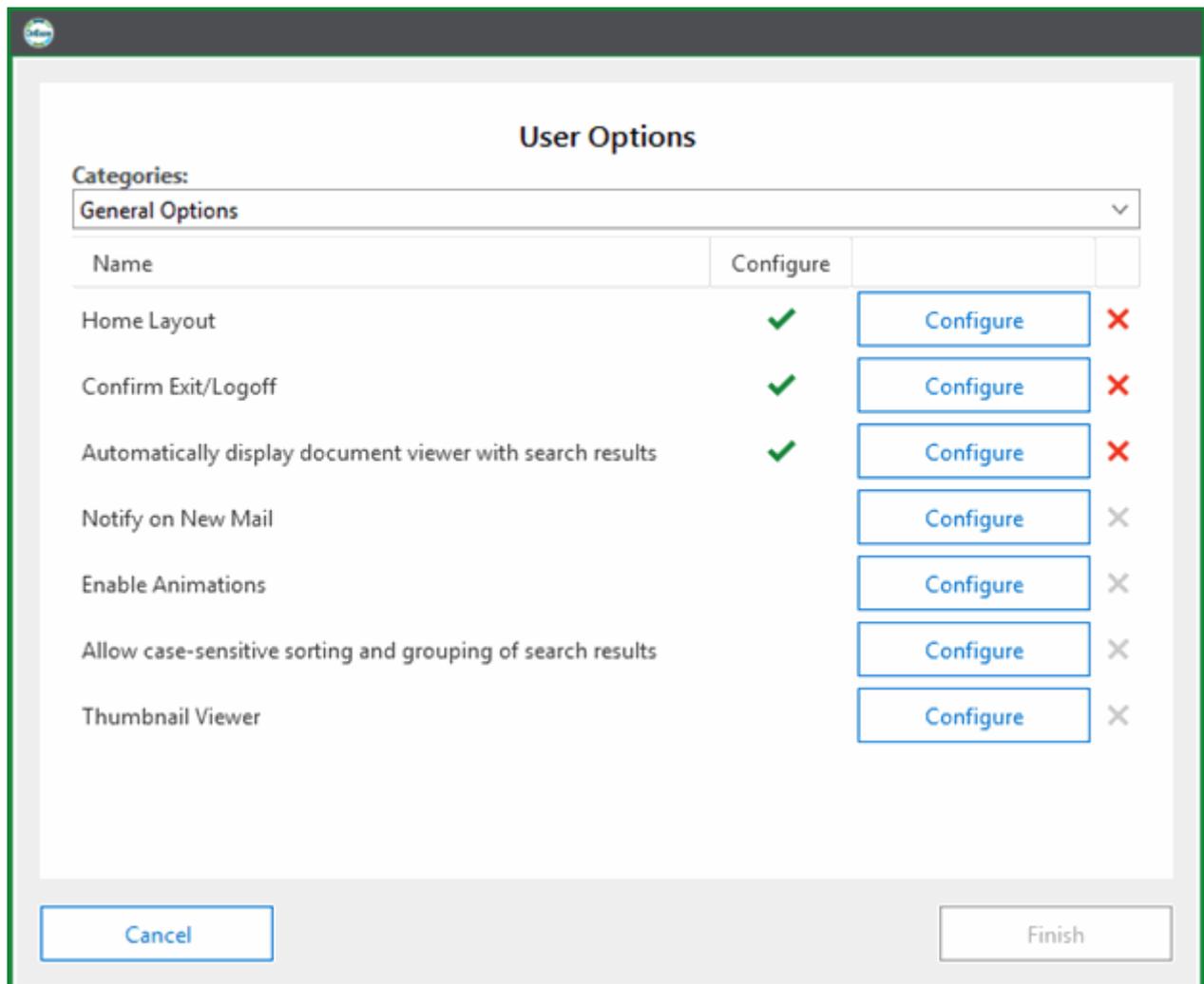


4. The **User Options** edit dialog is displayed:



Select a User Options category from the **Categories** drop-down select list.

- After a category has been selected, all of the available settings for each category will be listed below the **Category** drop-down select list:



If the option displays a check mark in the **Configure** column, settings for that option have been previously configured.

Click **Configure** to edit the settings for any option.

Click the red **X** next to the **Configure** button on previously configured options to remove the option configuration from the policy.

- Click **Finish** to apply your changes and to close the **General Settings** dialog.

## Changing the Assigned User Group of a User Option Policy

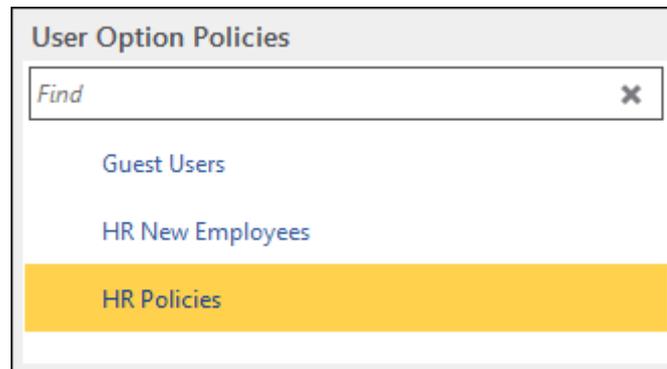
To change the assigned User Group of a User Option Policy:

1. In the **File** menu, click **Administration | User Option Policy Administration**:

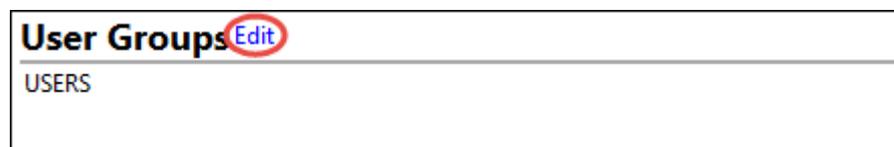


2. The **User Option Policy Administration** layout is displayed.

In the **User Options Policies** list, select the User Option Policy you would like to change the assigned User Group for:



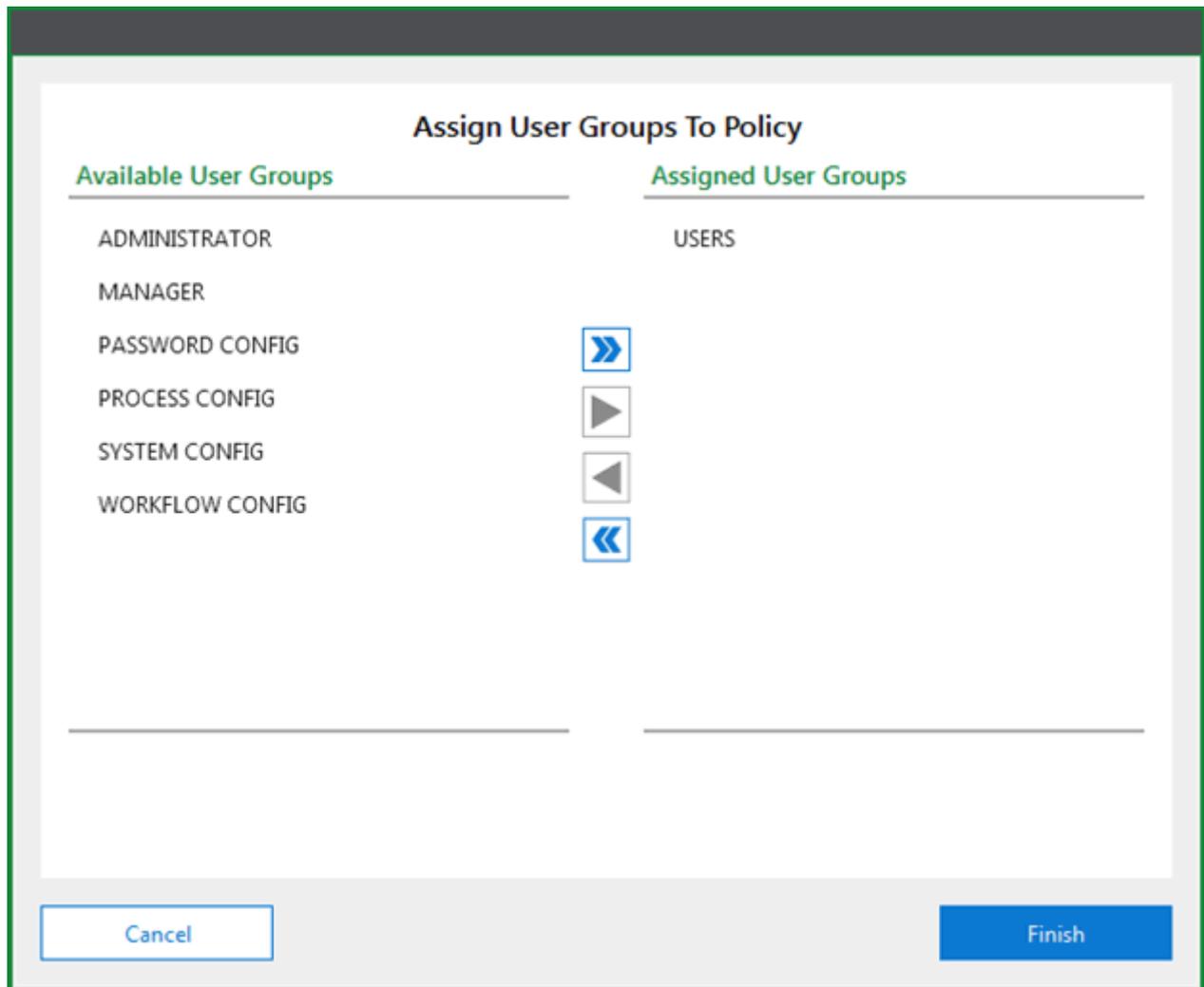
3. In the **User Option Policy Summary** area of the layout, click **Edit** in the **User Groups** section:



Or, you may click the **User Groups** button in the **Edit** ribbon group:



- The **Assign User Groups To Policy** edit dialog is displayed:



Move a User Group from the **Available User Groups** column to the **Assigned User Groups** column to assign a User Group to the policy. User Groups can be moved from one column to another by double-clicking them or by using the arrow control buttons.

- Click **Finish** to apply your changes and to close the **Assign User Groups To Policy** dialog.

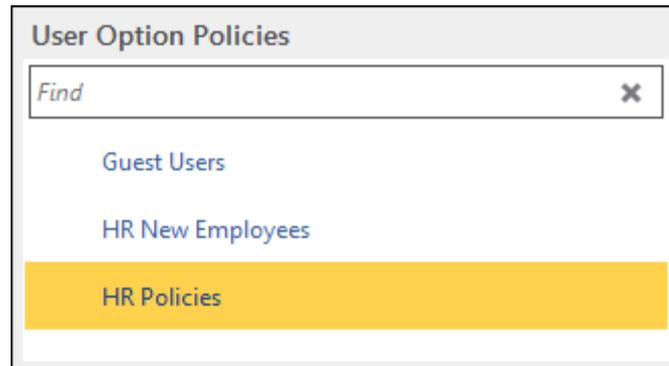
## Changing the Priority of a User Option Policy

To change the priority of a User Option Policy:

- In the **File** menu, click **Administration | User Option Policy Administration**:



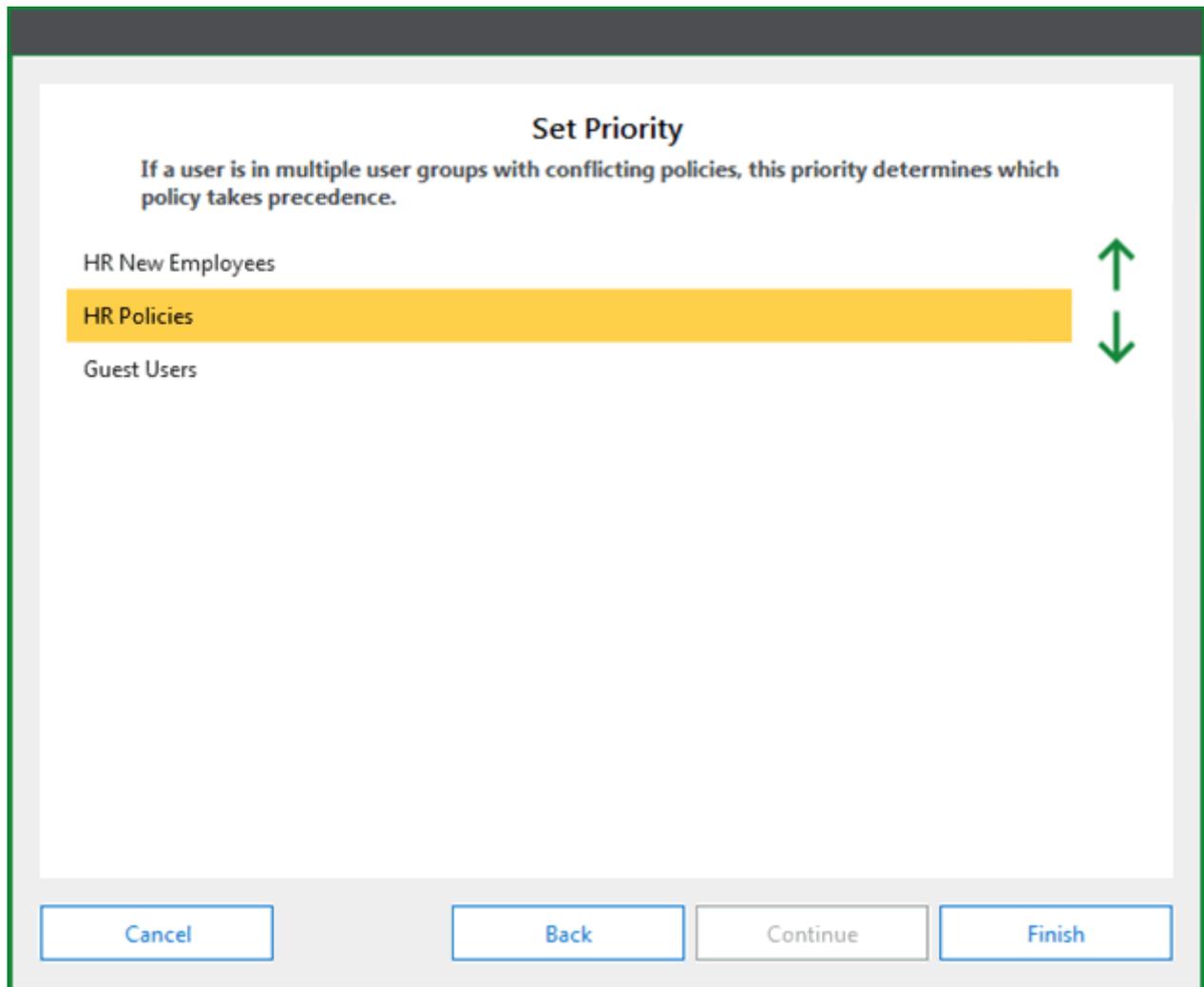
- The **User Option Policy Administration** layout is displayed.  
In the **User Options Policies** list, select the User Option Policy you would like to change the priority of:



- Click the **Priority** button in the **Edit** ribbon group:



4. The **Set Priority** edit dialog is displayed:



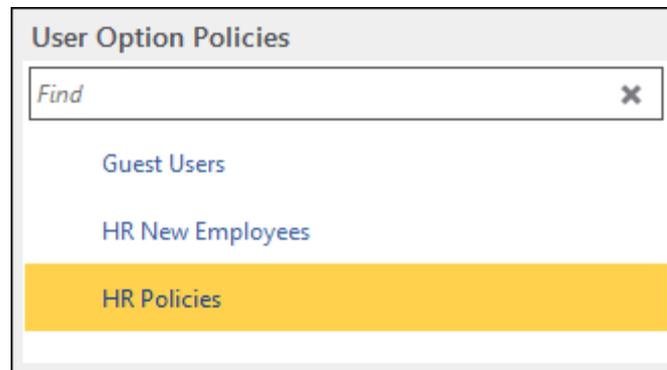
Re-order the User Option Policies as needed.

5. Click **Finish** to apply your changes and to close the **Set Priority** dialog.

## Deleting a User Option Policy

To delete a User Option Policy:

1. Select an existing User Option Policy from the **User Option Policies** list:



2. In the **Delete** ribbon group, click **User Option Policy**:



3. You are asked: **Are you sure you want to delete the selected User Option Policy?** Click **Yes** to delete the policy and to remove it from the **User Option Policy Administration** layout.

## Personal Page Tile Group Administration

---

**Note:** The **Templates for Personal Pages** privilege and **Usergroup Security** configuration right are needed to create and configure templates for Personal Pages and to share them with other User Groups. The **Personal Page Configuration** privilege is needed to add and edit tiles on the Personal Page. For additional information, see the **System Administration** Module Reference Guide.

---

Users with Administrative rights can distribute required and recommended tiles to specified User Groups. Tiles intended for distribution are contained within Tile Groups. These Tile Groups can be viewed and updated from your **Personal Page**. The following sections cover creating and editing Tile Groups, adding tiles to Tile Groups, and designating User Groups to each Tile Group.

## Creating a Tile Group

To create a named Tile Group to distribute to users:

1. In the **File** menu, click **Administration | Tile Group Administration**.
2. The **Tile Group Administration** layout is opened. Click **Add New** in the **Tile Group Administration** ribbon menu:



3. The **Create Tile Group** dialog is displayed:

Create Tile Group

Please enter a name for the Tile Group

OK Cancel

Enter the desired Tile Group name into the name field.

---

**Note:** Tile Group names cannot exceed 255 characters and must be unique.

---

4. Click **OK** to create the new Tile Group and to close the **Create Tile Group** dialog box.

## Renaming a Tile Group

Tile Groups created in the Unity Client can be renamed at a later time. To rename a Tile Group:

1. In the **File** menu, click **Administration | Tile Group Administration**.
2. The **Tile Group Administration** layout is opened. Select an existing Tile Group from the **Tile Groups** list:

Tile Groups

Find

Accounting Forms

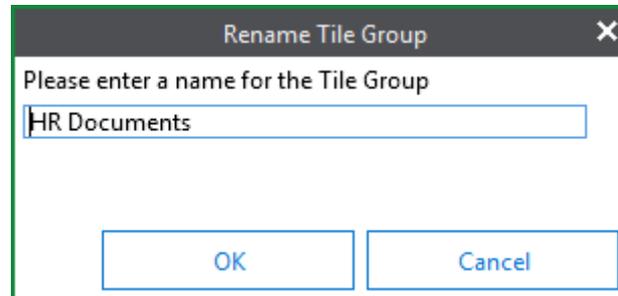
Administration Documents

HR Documents

3. In the ribbon menu, click **Edit Tile Group Name**:



4. The **Rename Tile Group** dialog box opens. Change the value in the name field:



---

**Note:** Tile Group names cannot exceed 255 characters and must be unique.

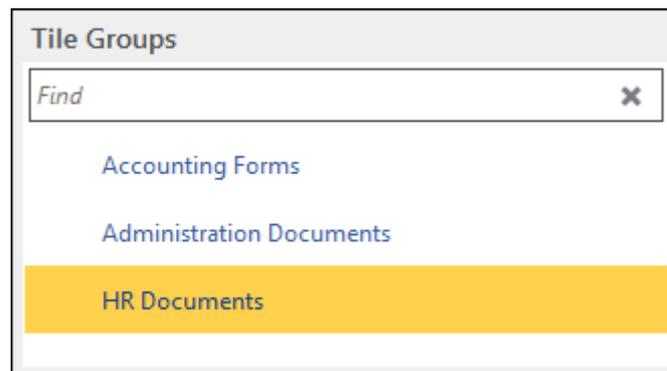
---

5. Click **OK**. The **Tile Groups** list will refresh and display the new name.

## Deleting a Tile Group

Tile Groups created in Tile Group Administration can be deleted. Deleted Tile Groups will be removed from all Personal Pages associated with the Tile Group. To delete a Tile Group:

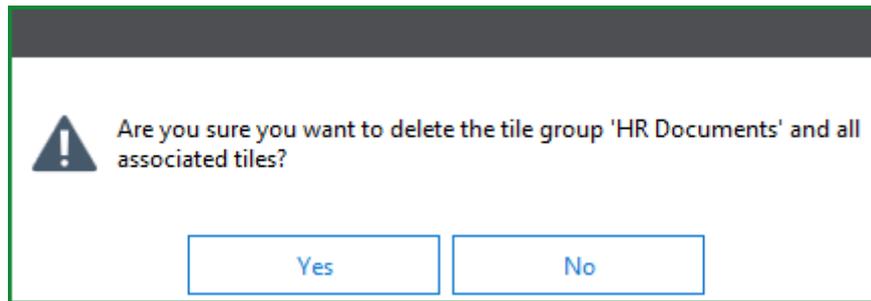
1. In the **File** menu, click **Administration | Tile Group Administration**.
2. The **Tile Group Administration** layout is opened. Select an existing Tile Group from the **Tile Groups** list:



3. In the ribbon menu, click **Delete**:



- When asked, “**Are you sure you want to delete the tile group '[Tile Group Name]' and all associated tiles?**” click **Yes**:

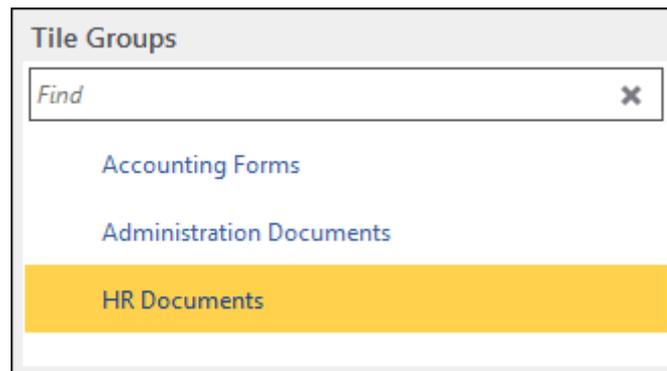


- The Tile Group is removed from the **Tile Groups** list.

## Assigning a Tile Group to a User Group

In order for Tile Groups to be pushed out to users, a User Group must be associated with the Tile Group. To assign a User Group:

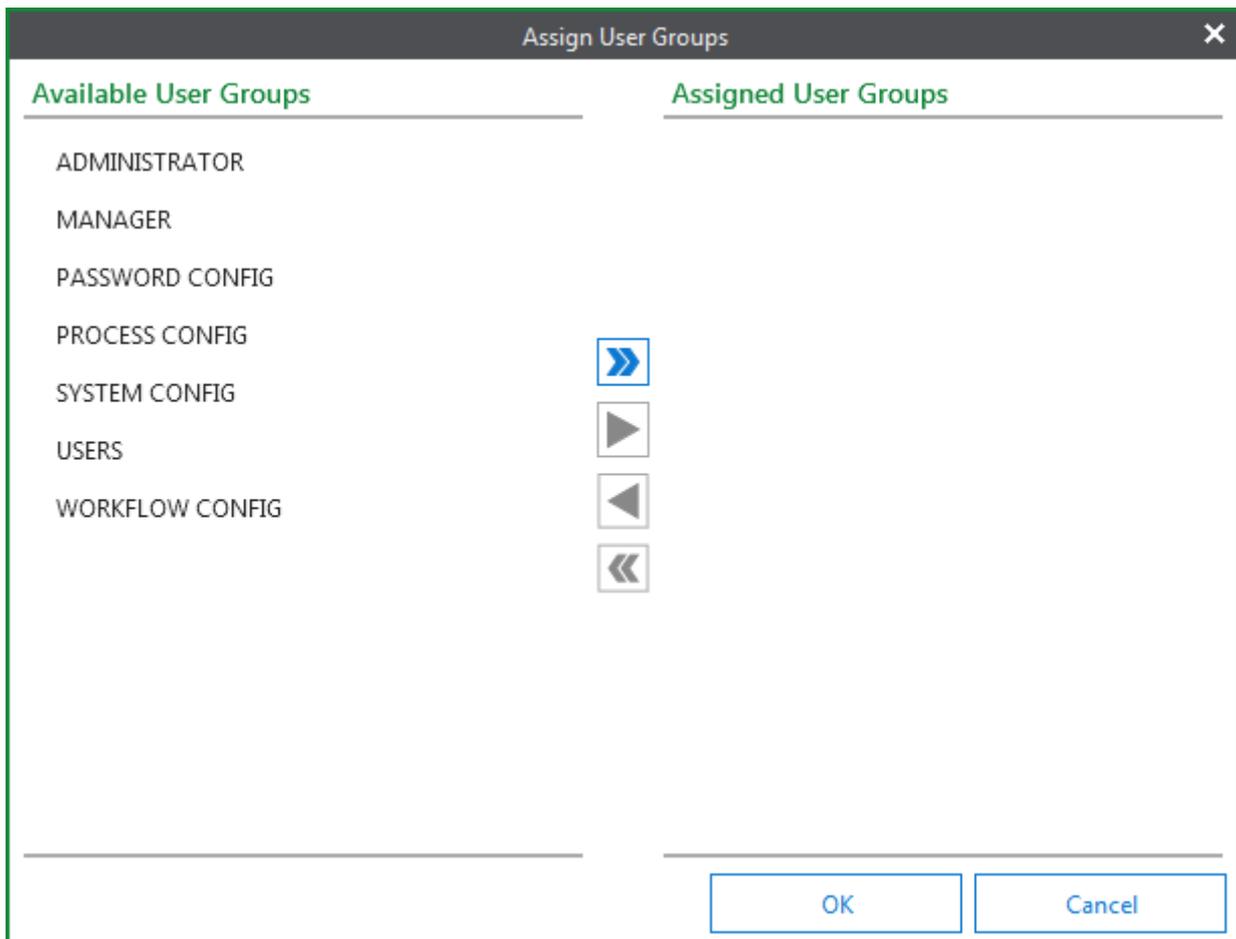
- In the **File** menu, click **Administration | Tile Group Administration**.
- The **Tile Group Administration** layout is opened. Select an existing Tile Group from the **Tile Groups** list:



- In the ribbon menu, click **Edit User Groups**:

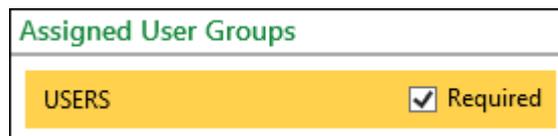


- In the **Assign User Groups** dialog box, assign the appropriate User Group(s) and move them from the **Available User Groups** column to the **Assigned User Groups** column:



User Groups in the **Assigned User Groups** column will be presented with the Tile Group on their Personal Page.

- Select **Required** if you would like the Tile Group to be read-only for the User Group:



Users will not be able to delete or change the contents of the Tile Group if this is selected. If you do not select **Required**, users will be able to delete and edit the Tiles contained within the Tile Group.

---

**Note:** If a user is part of two User Groups and the Tile Group is assigned as Required for one of the User Groups, and not Required for the other, the Tile Group will be presented as not Required to the user. These tiles will be shown in the **My Tiles** section of their Personal Page.

---

- Click **OK** to save your changes and to close the **Assign User Groups** dialog.

## Adding Tiles to Tile Groups

Many items within OnBase that can be used on the Personal Page can also be added to a Tile Group. The following can be added to a Tile Group:

- OnBase Layouts
- Documents
- Folders
- Custom Queries
- Custom Query Results
- Document Knowledge Transfer Reading Groups
- Document Tracking folders and folder lists
- E-Forms/Unity Forms
- Full Text Search (Full-Text Indexing Server for Autonomy IDOL)
- Workflow document queues
- Workflow Combined Inboxes
- Internal Mailbox (with a list of unread messages)
- Individual Document Templates
- WorkView Applications
- Import Tiles with specified Document Types
- Dashboards and Dashboard items

---

**Note:** Non-document Workflow queues cannot be added to Tile Groups.

---

A tile can belong to more than one Tile Group. Tiles will be added automatically to users' Personal Pages.

---

**Note:** Tiles added to non-required Tile Groups are displayed in the My Tiles group on a user's Personal Page. Only required Tile Groups are automatically displayed.

---

If you attempt to add an item to a Tile Group before any Tile Groups have been created, you will be prompted to create a new Tile Group. Refer to [Creating a Tile Group on page 347](#).

The sections below cover adding documents, folders, and individual items, folders, layouts, and Custom Query results to Tile Groups.

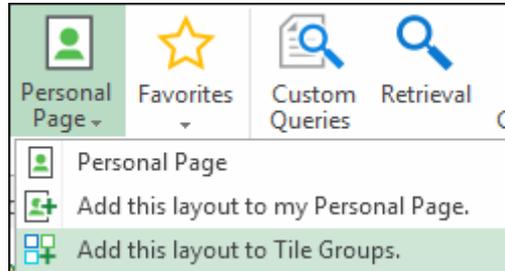
## Adding Documents, Folders, and Individual Items to Tile Groups

Generally, individual items can be added to Tile Groups by right-clicking the item you wish to add and selecting the **Send To | Tile Groups** option or, if the item is open, by clicking the **Send To** button in the ribbon menu and clicking **Tile Groups**. After you have selected this option, you will be prompted to select the appropriate Tile Group(s) in the Tile Group selection list.

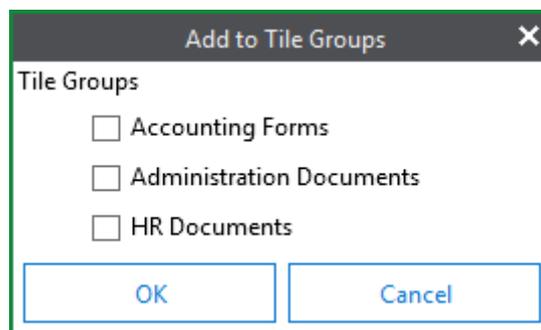
## Adding a Layout to Tile Groups

To add a **Layout** to Tile Groups:

1. With the layout you wish to add to the Tile Group displayed, navigate to the **Home** tab and click the bottom part of the **Personal Page** button located in the **Favorites** group.
2. Click **Add this layout to Tile Groups**:



3. The **Add To Tile Groups** dialog is displayed:



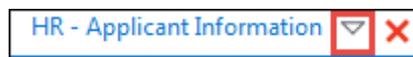
Select the appropriate Tile Group(s).

4. Click **OK** to add the layout to the Tile Group(s) and to close the **Add to Tile Groups** dialog.

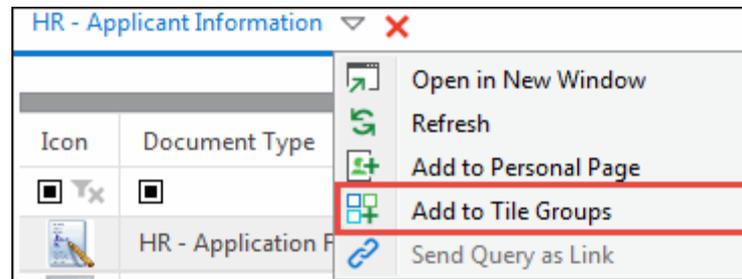
## Adding Custom Query Results to Tile Groups

To add a **Custom Query results** tile to Tile Groups:

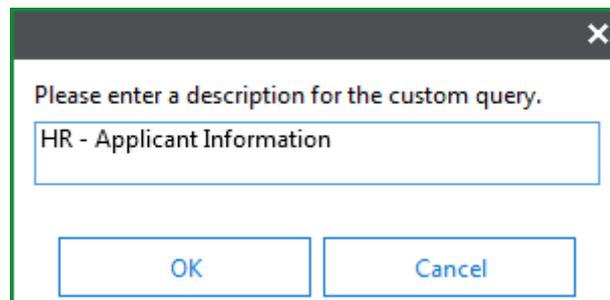
1. Click the drop-down button on the Custom Query tab:



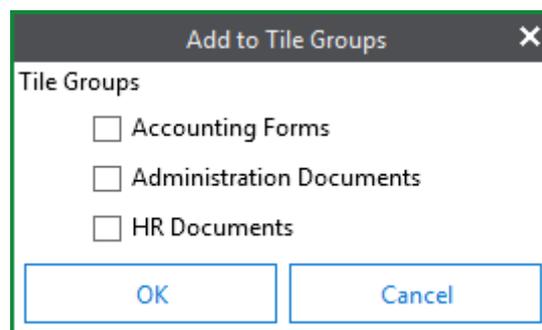
2. Click **Add to Tile Groups**:



3. The Description dialog is displayed. Enter a description for the Custom Query:



4. Click **OK** when a description has been entered.
5. The **Add To Tile Groups** dialog is displayed:



Select the appropriate Tile Group(s).

6. Click **OK** to add the Custom Query results to the Tile Group(s) and to close the **Add to Tile Groups** dialog.

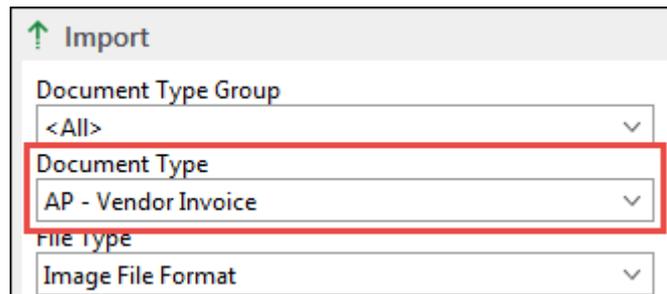
## Adding Import Tiles with Specified Document Types to Tile Groups

To add an Import layout tile with a Document Type to Tile Groups:

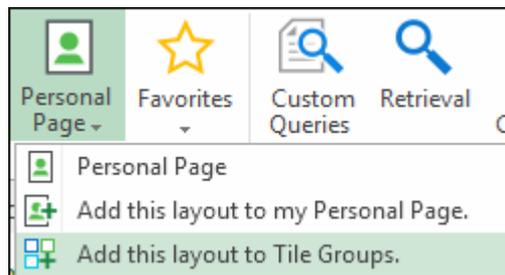
1. In the **Create** ribbon group, click the **Import** button.



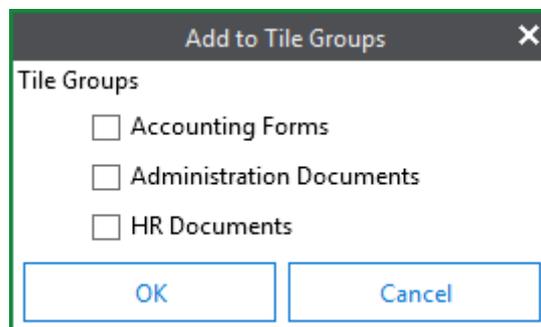
2. The **Import** layout is displayed. Select a Document Type in the **Import** pane.



3. After a Document Type has been selected, navigate to the **Home** tab.
4. From the **Favorite** ribbon group, click the bottom portion of the **Personal Page** button.



5. Select **Add this layout to Tile Groups**.
6. The **Add To Tile Groups** dialog is displayed:



Select the appropriate Tile Group(s).

7. Click **OK** to add the Import tile to the Tile Group(s) and to close the **Add to Tile Groups** dialog.
8. The tile is added to the Tile Group(s). The name of the tile reflects the Document Type specified.




---

**Note:** To add an Import tile without a specified Document Type, add the layout to your Personal Page before selecting a Document Type.

---

## Managing and Configuring Tiles in Tile Groups

Tiles that have been added to a Tile Group can be configured and managed to suit your needs. To configure a tile:

1. Click the **Configure** button on the tile you want to configure:



2. The **General Options** dialog box is displayed. The following configurable options are available:

Option Tab	Option	Description
General	Title	Modify the title that is displayed on the tile.
	Description	Modify the description that is displayed on the tile.
	Color	Modify the color of the tile displayed on the Personal Page.

When you are finished configuring the tile, click **Save** to save your changes. Click **Cancel** to cancel.

The following sections describe additional options that can be configured for some tiles in Tile Groups:

- [Custom Query Results Tiles on page 356](#)

## Custom Query Results Tiles

The following additional items can be configured on the Custom Query Results tile configuration screen:

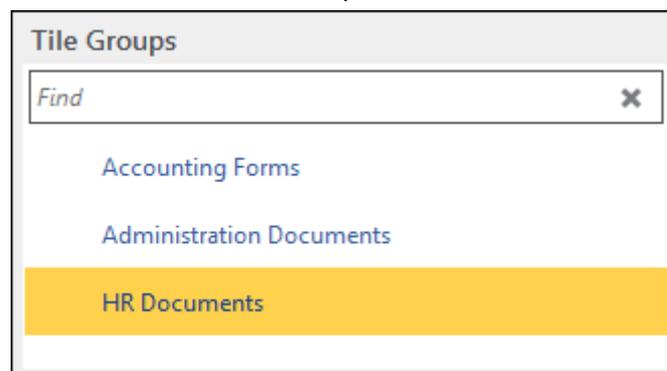
Option Tab	Description
<b>Custom Query</b>	<p>This screen allows you to modify the form field values that are used when returning the Custom Query result displayed on the tile. You can add, modify, or remove search terms.</p> <hr/> <p><b>Note:</b> You can include additional instances of a Keyword Type, or use Wildcard or Boolean operators to narrow the search.</p> <hr/> <p>When you are finished modifying form field values, click <b>Search</b> to run the Custom Query and validate the results. Click <b>OK</b> to confirm the results and return to the <b>Tile Group Administration</b> layout.</p>

## Removing Tiles from a Tile Group

Tiles previously added to a Tile Group can be removed. Tiles will be removed from user's Personal Pages when the users next navigate to their Personal Page. The tile will be deleted as long as it is not an altered suggested tile. Altered suggested tiles cannot be deleted by an administrator - only required and unaltered suggested tiles may be deleted.

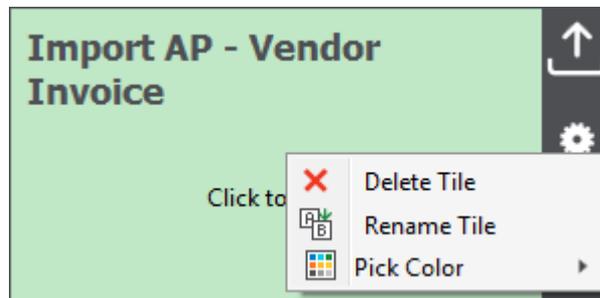
To remove a tile from a Tile Group:

1. In the **File** menu, click **Administration | Tile Group Administration**.
2. The **Tile Group Administration** layout is opened. Select an existing Tile Group from the **Tile Groups** list:

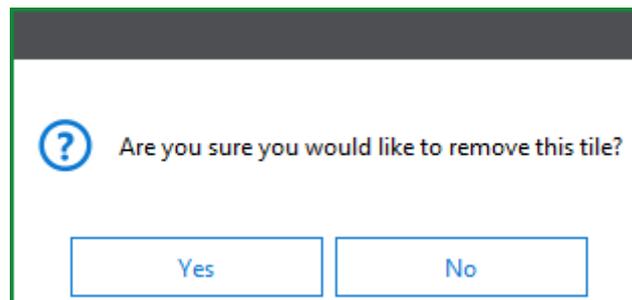


3. Right-click on the tile you want to delete from the Tile Group.

4. Select **Delete Tile** from the right-click menu:



5. When asked if you are sure you would like to remove this tile, click **Yes**:



- Click **No** to cancel and keep the tile in the Tile Group.
6. The tile is removed from the Tile Group.

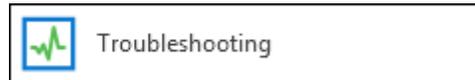
## Troubleshooting Layout

---

**Note:** The **Troubleshooting** layout is intended for use by your first line of support or users trained to interpret various troubleshooting messages.

---

The **Troubleshooting** layout is accessible from within the **File** menu. To access this layout, click the Application icon and select **Troubleshooting**:



This layout shows **Troubleshooting Messages**, **Connection Information**, **Message Sources**, **Rendering Information**, **Performance Counters**, **Client Side Locks**, **Memory Usage**, and **SQLCE Information**. You can also create **Bug Reports** from this layout.

## Troubleshooting Messages

The main pane within the Troubleshooting layout is the **Troubleshooting Messages** pane. This pane displays the **Timestamp**, **Type**, and **Message** for each entry.

To export the contents of the Troubleshooting Messages pane, click **Save to File**.



Exporting the messages to file is useful when communicating with support. The resulting file, which is a Log file (.log), is saved to your workstation for later use.

To clear the contents of the pane, click **Clear Log**.



---

**Note:** The Troubleshooting Messages log is limited to 20 MB.

---

## Creating Bug Reports

**Bug Reports** can be created from the Troubleshooting layout. Bug Reports generate zipped files that include documents containing relevant **Messages**, **Exceptions**, **Logging Service** information, the **Timestamp** of the creation time and date of the Bug Report, and, if selected, a screenshot. The file can be provided to a system administrator or solution provider when registering your issue.

---

**Note:** Bug Reports are not a substitute for a formal reporting mechanism within your organization.

---

To create a Bug Report:

1. Right-click within the **Troubleshooting Messages** pane and select **Create Bug Report**.
2. The **Create Bug Report** dialog is opened.
3. Enter your name and email into the **Name** and **Email** fields.
4. Select **Include Screenshot** if you would like to add a screenshot of the active layout to your report.
5. In the field at the bottom of the dialog, include a detailed description of the bug you encountered.
6. Click **Save To Desktop**. The Bug Report file will be found on your workstation Desktop. Send this file to your OnBase system administrator.

## Using the Request Profile Diagram

The **Request Profile Diagram** layout is used for monitoring latency in Service Requests. Requests that fail, timeout, or return an exception are visible in this layout.

---

**Note:** In order to see Service Request timing results, the Application Server must have **service-profile** diagnostics enabled.

---

To access the Request Profile Diagram layout, click the Application icon and select **Troubleshooting | Request Profile Diagram**:



Press **Record** to begin profiling actions performed:



A live graph of requests made to the server is available in this view.

The information collected in this layout can be saved as an .URP file by clicking **Save**. These saved files can be opened again at a later time by clicking **Open** and selecting the previously saved .URP file.

---

**Note:** Saved .URP files can only be opened in the same version of OnBase in which they were created.

---

---

**Note:** Only data can be exported to file. The graph itself cannot be saved.

---

Tracer Requests, which can be sent by clicking **Send Tracer**, may help diagnose environmental issues.



The information displayed in the Request Profile Diagram can be cleared by clicking **Clear**.



## Custom Query Configuration

The following sections describe Custom Query configuration settings that can be used with the Unity Client. For further information on Custom Query configuration, see the **System Administration** documentation.

### Grouping Columns

Custom Queries that have been configured with display columns can be configured to automatically group results by a display column.

---

**Note:** Custom Written SQL Custom Queries cannot be configured for column grouping.

---

To configure Custom Query column grouping:

1. Select a Custom Query in the OnBase Configuration module's **Custom Query** dialog box.
2. Click **Group Columns**. The **Query Results Group Columns** dialog box is displayed:

3. Double-click a column in the **Available Columns** list, or select it and click **Add**. The selected column is displayed in the **Selected Columns** list.
4. Repeat the previous step to add additional columns.

5. Order the columns in the **Selected Columns** list by selecting them and using the **Move Up** and **Move Down** buttons.
6. Click **Save**.

## Filtering Columns

Custom Queries that have been configured with display columns can be configured to allow a user to filter the Custom Query results set by criteria in various display columns.

---

**Note:** Custom Written SQL Custom Queries cannot be configured for column filtering.

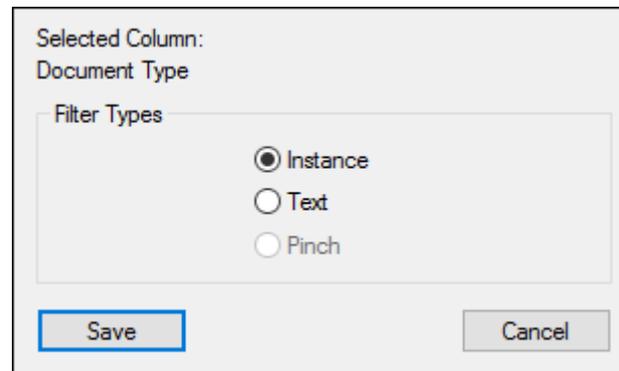
---

To configure Custom Query column filtering:

1. Select a Custom Query in the OnBase Configuration module's **Custom Query** dialog box.
2. Click **Filter Columns**.
3. The **Query Results Filter Columns** dialog box is displayed:

4. Double-click a column in the **Available Columns** list, or select it and click **Add**.

- The **Filter Type Configuration** dialog box is displayed:



- Select one of the following **Filter Types**:

Filter Type	Description
<b>Instance</b>	<p>This filter is displayed as a list of values with the number of instances of that value.</p> <hr/> <p><b>Tip:</b> Use an instance filter for any data which has a narrow range of discrete values, such as a Keyword Data Set.</p> <hr/> <p><b>Note:</b> Instance filters are only available for alphanumeric Keyword Type Data Types, as well as the Document Name, Author, Document Type, Workflow Queue, Note Contents, and Note Type columns.</p>
<b>Text</b>	<p>This filter is displayed as a text box.</p> <hr/> <p><b>Note:</b> Text filters are available for all Keyword Type Data Types and columns.</p>
<b>Pinch</b>	<p>This filter is displayed as a slider, with two thumbs beneath a sparkline.</p> <hr/> <p><b>Tip:</b> Use a pinch filter for values with a moderate to large range, or when the user is unsure of specific range boundaries. Pinch filters should not be used for high precision or a small range of values.</p> <hr/> <p><b>Note:</b> Pinch filters are only available for non-alphanumeric Keyword Type Data Types, as well as the Document Date, Date Stored, Document Handle, Author ID, Arrival Time, and Note Count columns.</p>

- Click **Save**.
- The selected column is displayed in the **Selected Columns** list.
- Repeat steps 4 and 8 to add additional columns.

10. Order the filters in the **Selected Columns** list by selecting them and using the **Move Up** and **Move Down** buttons.

---

**Note:** The order in which filters appear in the **Selected Columns** list is the order in which they will appear in the Unity Client's **Custom Queries** pane.

---

11. Click **Save**.

## Document Retrieval

The following sections describe additional Document Retrieval configuration settings that can be used with the Unity Client.

### Document Retrieval Threshold

The appSettings node in the Application Server's Web.config file contains the following settings which can be used to adjust the number of document results returned when retrieving a document, conducting a Custom Query, or opening a Workflow queue.

#### DocumentQueryWarningThreshold

This Unity Client setting controls the threshold of document results at which a warning is displayed to a user. For example, if this value is set to 500, a warning will be displayed to the user when their document retrieval search or custom query will return 500 or more results.

#### DocumentQueryLimit

This Unity Client setting controls the maximum number of document results which are returned when retrieving documents or conducting a Custom Query. The maximum value allowed is 10000. The Workflow queue inbox returns the results respecting the setting; however, a warning is displayed to the user.

---

**Note:** Folders and cross-references do not respect this threshold limit.

---

## Configuring Google Services

To use Google Drive when importing and checking out documents and/or to use Gmail as your external mail client, you must first configure the functionality. The following sections outline how to enable and configure Google Services.

---

**Note:** To use Google Services, a Google account with access to Gmail and Google Drive is required.

---

**Note:** If Google Services is configured, documents will, by default, be displayed in the Google viewer.

---

## Creating a Google API Project in the Google Developers Console

The following must be completed in the Google Developers Console (<https://console.developers.google.com/project>) before configuration can occur:

- Create a new **Project**
- Acquire a **Project ID**
- Enable the **Drive API** and the **Google+ API**
- Create a **Client ID** with the following settings: **Installed Application**, with **Other** listed as the **Installed Application Type**
- Acquire a **Client Secret**
- Customize a **Consent Screen**

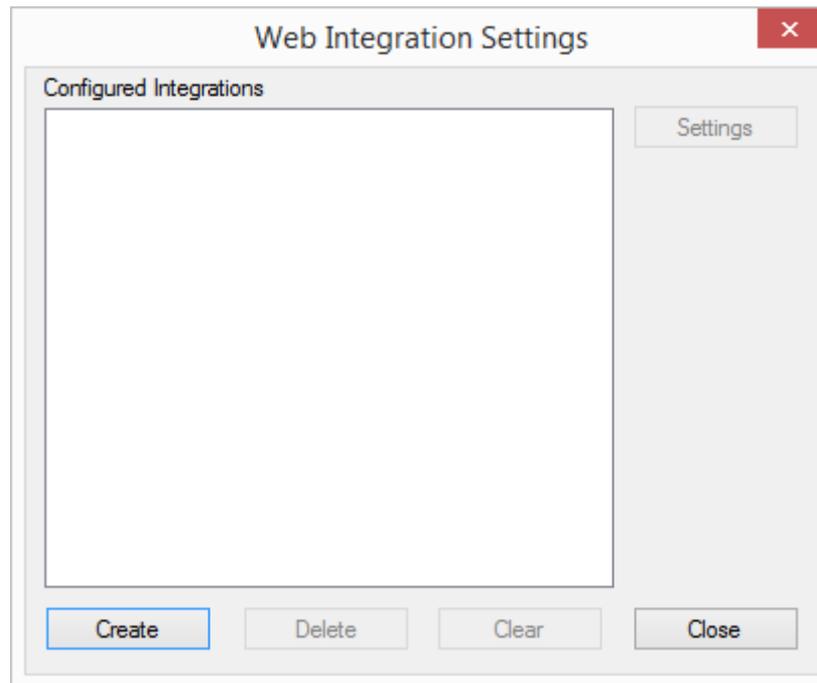
For additional information on completing these requirements, refer to Google's documentation.

## Enabling Google Services

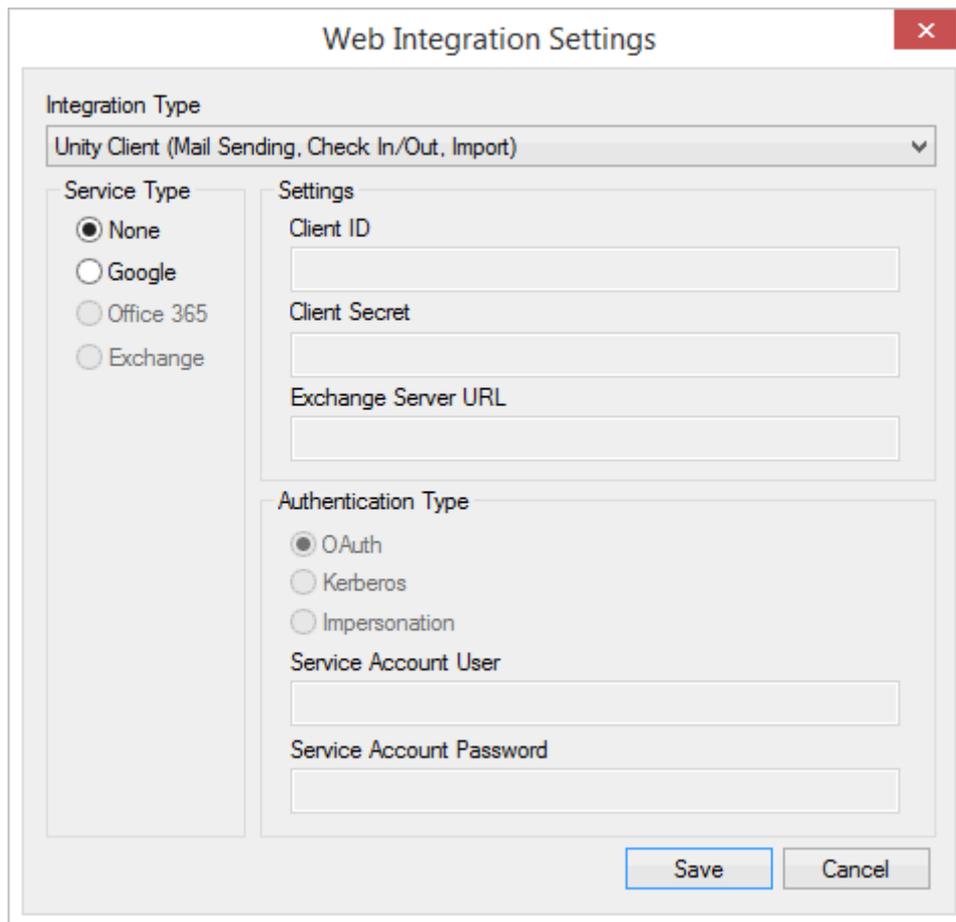
To use Google Services in the Unity Client, an integration must be created from within the Configuration module.

To enable Google functionality:

1. In the Configuration module, navigate to **Utils | Web Integration Settings**. The **Web Integration Settings** dialog box is displayed.



- Click **Create** to configure a new integration. A dialog box is displayed, containing settings for the integration.



The image shows a dialog box titled "Web Integration Settings" with a close button (X) in the top right corner. The dialog is divided into several sections:

- Integration Type:** A dropdown menu currently showing "Unity Client (Mail Sending, Check In/Out, Import)".
- Service Type:** A group box containing four radio buttons: "None" (selected), "Google", "Office 365", and "Exchange".
- Settings:** A group box containing three text input fields: "Client ID", "Client Secret", and "Exchange Server URL".
- Authentication Type:** A group box containing three radio buttons: "OAuth" (selected), "Kerberos", and "Impersonation".
- Service Account User:** A text input field.
- Service Account Password:** A text input field.
- Buttons:** "Save" and "Cancel" buttons at the bottom right.

- Select **Unity Client (Mail Sending, Check In/Out, Import)** from the **Integration Type** drop-down select list.
- Select **Google** from the **Service Type** options. The **Client ID** and **Client Secret** fields are made available, and the **Authentication Type** is set to **OAuth**.
- In the **Client ID** field, enter the Client ID created in the Google Developers Console.
- In the **Client Secret** field, enter the Client Secret acquired from the Google Developers Console.
- Click **Save** to create the integration.

## Configuring Gmail

To configure Gmail as the external mail client for the Unity Client, the Unity Client configuration file (**obunity.exe.config**) must be edited. Refer to [appSettings on page 372](#) for information on how to configure this option.

# Microsoft Office Web Application Server Integration

The OnBase Web Application Open Platform Interface (WOPI) Server integrates with the Microsoft Office Online Server and provides users with integrated access to OpenDocument and Microsoft Office documents within OnBase using the WOPI viewer.

The WOPI Server is a communication layer between the separately installed and configured Microsoft Office Online Server and the OnBase Application Server. It seamlessly displays Word, Excel, and PowerPoint documents to end users within the familiar OnBase client interfaces.

For information about WOPI Server installation and configuration, see the **System Administration** module reference guide.

## The Unity Client Configuration File

The Unity Client configuration file (**obunity.exe.config**) is an XML file used to configure the Unity Client and control its behavior and feature sets. The file contains plain text and resides in the same directory as the Unity Client executable (**obunity.exe**). To change features, edit the appropriate value, and save and close the file.

---

**Note:** When using Unicode characters in the Unity Client Configuration File (such as in DataSource names), ensure you are saving the file with Unicode encoding (e.g. UTF-8).

---

## AD FS Configuration

For information on how to configure the Unity Client for AD FS, see the **Authentication** module reference guide.

## Hyland.Canvas.Client

The **ServiceMode** attribute is available in the **Hyland.Canvas.Client** element in the Unity Client configuration file.

This element controls whether the Unity Client runs in Service Mode or Interactive Mode.

When **enabled** is set to **true**, the Unity Client runs in Service Mode. This means that:

- Closing the Unity Client with the X in the top right corner minimizes it to the system tray, where it continues to run. The embedded document viewer is closed and you are prompted to save any changes.
- The **Log Out** button is not available from the Unity Client **File** menu. The ability to log out of OnBase is available by right-clicking the Unity Client system tray icon.
- When **allowExit** is **true**, the **Exit OnBase** option is available from the system tray. When **allowExit** is **false**, the **Exit OnBase** option is not available from the system tray.

- When **autoLaunch** is true, the Unity Client will launch in Service Mode when Windows starts.  
When **autoLaunch** is false, the Unity Client will not launch in Service Mode when Windows starts.
- The **sendSessionID** attribute is treated as **false** for Pop-Based Application Enabler contexts that use this attribute.
- The following features are available:

Feature Name	Description
<b>Unity Client</b>	<p>When <b>enabled</b> is set to <b>true</b>, the <b>Launch Unity Client</b> option is available from the system tray. Double-clicking the system tray icon will launch the Unity Client.</p> <p>When <b>enabled</b> is set to <b>false</b>, the <b>Launch Unity Client</b> option is not available from the system tray. Double-clicking the system tray icon will launch the Application Enabler toolbar if the <b>ApplicationEnabler</b> feature is enabled.</p>
<b>Application Enabler</b>	<p>When <b>enabled</b> is set to <b>true</b>, the Application Enabler module can be used.</p> <p>When <b>enabled</b> is set to <b>false</b>, the Application Enabler module cannot be used.</p>
<b>Unity Client Automation API</b>	<p>When <b>enabled</b> is set to <b>true</b>, the Unity Client Automation API, which is used by third-party applications to automate the Unity Client, can be used.</p> <p>When <b>enabled</b> is set to <b>false</b>, the Unity Client Automation API cannot be used.</p>
<b>Virtual Print Driver</b>	<p>When <b>enabled</b> is set to <b>true</b>, the Virtual Print Driver module can be used.</p> <p>When <b>enabled</b> is set to <b>false</b>, the Virtual Print Driver module cannot be used.</p>
<b>Unity Pop</b>	<p>Whether Unity Pop is enabled.</p> <p>When <b>enabled</b> is set to <b>true</b>, Unity Pop is enabled.</p> <p>When <b>enabled</b> is set to <b>false</b>, Unity Pop is not enabled.</p> <hr/> <p><b>Note:</b> To specify what type of Unity Pop item is sent (<b>Unity Pop link</b> or <b>Unity Pop file</b>), refer to the <b>emailLinkAs</b> setting in <a href="#">appSettings on page 372</a>.</p> <hr/>

When **enabled** is set to **true** and the **-deferredlogin** command line switch is applied:

- After the Unity Client starts, users are not prompted to log on. The Unity Client is minimized to the Windows system tray. Double-clicking the shortcut a second time will open the Client login.

- Users are required to log on to the Unity Client when performing the first Unity Client context with Application Enabler. Triggering subsequent contexts does not require users to log on to the Unity Client.
- Users are not required to log on to the Unity Client when performing OnBase Client, Web Client, and Pop-Based Application Enabler contexts.  
For more information about the **-deferredlogin** command line switch, refer to the Application Enabler module reference guide.

When **enabled** is set to **false**, the Unity Client runs in Interactive Mode. This means that:

- The Unity Client cannot be minimized to a system tray icon.
- If Application Enabler is not licensed, any context event scraping is in Demo Mode.

## Trusted Certificates

In order to help increase the security of the system, the **AllowAllSSLCertificates** setting is set to **False** by default. This ensures that if the certificate used for an HTTPS connection cannot be verified, then the connection is refused and users cannot log on to the Unity Client. To help maintain a higher level of security, it is recommended that the **AllowAllSSLCertificates** setting is set to **False**.

## ServiceLocations

Service Locations are pre-configured items that contain web service connection information. They can be added and modified in the Unity Client configuration file.

---

**Note:** Within the Unity Client, Unicode characters are only supported in data source names and **FriendlyName** contexts if the Unity Client configuration file is saved with Unicode encoding.

---

Setting Name	Description
<b>ServicePath</b>	The URL to the Service.asmx page of the Application Server. For example, <b>http://[Application Server]/appserver/service.asmx</b> .  <b>Note:</b> The Service Path URL must end in <b>.asmx</b> . The Unity Client cannot be configured to use remoting as the transport protocol.
<b>DataSource</b>	The data source name (configured at the Application Server) to connect to. For example, <b>OnBase</b> .
<b>FriendlyName</b>	The "friendly name" of the service location. This name is displayed in the Unity Client's title bar. For example, <b>OnBase</b> .
<b>UseNTAuthentication</b>	When set to <b>true</b> , the Unity Client is configured to use Active Directory or LDAP Authentication.

Setting Name	Description
<b>DefaultDomain</b>	<p>The name of the domain to use by default. For example, <b>mydomain.com</b>.</p> <hr/> <p><b>Note:</b> The value of <b>DefaultDomain</b> is not case sensitive.</p> <hr/> <p><b>Note:</b> If no value is specified for <b>DefaultDomain</b>, the current domain of the user logging in is used as the default domain.</p> <hr/>
<b>UseADFS</b>	<p>When set to <b>true</b>, the Unity Client is configured to use ADFS Authentication. Additional steps must be taken to configure ADFS Authentication in the Unity Client. For more information, see the <b>Authentication</b> module reference guide.</p> <hr/> <p><b>Note:</b> If <b>UseADFS</b> is set to <b>true</b>, <b>UseNTAuthentication</b> must be set to <b>false</b>.</p> <hr/>
<b>IdpUrl</b>	The URL to the IDP server to be used for authentication.
<b>IdpSilent</b>	A <b>true</b> or <b>false</b> value indicating if the user should be prompted with a web browser showing the IDP Path.

To configure multiple Service Locations for your OnBase solution, add an additional Service Location prior to the `</ServiceLocations>` tag in the Unity Client configuration file. For example, `<add ServicePath="http://[name of server]/appserver/Service.asmx" DataSource="OnBase" FriendlyName="OnBase" UseNTAuthentication="false" DefaultDomain="" UseADFS="false" IdpUrl="" IdpSilent="false"/>`.

**Note:** The Unity Client will automatically log in if there is only one entry in the **ServiceLocations** element in the Unity Client configuration file, the **UseNTAuthentication** attribute is set to **true**, and the **Core Services** option in the **Directory Service Authentication** dialog box in the OnBase Configuration module is not selected. For more information about the **UseNTAuthentication** attribute and the **Core Services** option, see the **Authentication** module reference guide.

## appSettings

The following settings are available in the **appSettings** section of the Unity Client configuration file:

Setting Name	Description
<b>mailclient</b>	<p>The email client that will be used to email documents from the Unity Client.</p> <p>When set to <b>outlook</b>, Microsoft Outlook will be used.</p> <p>When set to <b>lotus</b>, Lotus Notes will be used.</p> <p>When set to <b>gmail</b>, Google Gmail will be used.</p> <p>When set to <b>groupwise</b>, Novell GroupWise will be used.</p> <hr/> <p><b>Note:</b> When sending messages with Novell GroupWise, Plain Text is the only format available.</p> <hr/> <p><b>Note:</b> When Microsoft Outlook and Novell GroupWise are installed on the same machine, using GroupWise as the Default Mail Client for the Unity Client may result in unexpected behavior and is not supported.</p> <hr/>

Setting Name	Description
<b>emailLinkAs</b>	<p>Whether <b>Send To   Mail Recipient (as Link)</b> is enabled, and how links to documents will be sent. Possible settings are: <b>disabled</b>, <b>docpop</b>, <b>upop-file</b>, and <b>upop</b>.</p> <p>When set to <b>disabled</b>, <b>Send To   Mail Recipient (as Link)</b> is not available.</p> <p>When set to <b>docpop</b>, DocPop links will be sent via <b>Send To   Mail Recipient (as Link)</b>.</p> <hr/> <p><b>Note:</b> To send DocPop links, the <b>Create Integration Hyperlink</b> privilege is needed.</p> <hr/> <p>When set to <b>upop-file</b>, Unity Pop files will be sent via <b>Send To   Mail Recipient (as link)</b>.</p> <hr/> <p><b>Note:</b> To view Unity Pop files, the Unity Client must be running in Service mode. Within the <b>ServiceMode</b> element, <b>enabled</b> must be set to <b>true</b>. <b>Unity Pop</b> must also be enabled within the <b>ServiceMode</b> section of the Unity Client configuration file.</p> <hr/> <p>When set to <b>upop</b>, Unity Pop URI links will be sent via <b>Send To   Mail Recipient (as link)</b>.</p> <hr/> <p><b>Note:</b> To view Unity Pop URI links, the Unity Client must be running in Service mode. Within the <b>ServiceMode</b> element, <b>enabled</b> must be set to <b>true</b>. <b>Unity Pop</b> must be also enabled within the <b>ServiceMode</b> section of the Unity Client configuration file.</p> <hr/> <p><b>Note:</b> To send Unity Pop links, the <b>Create Integration Hyperlink</b> privilege is needed.</p> <hr/>
<b>docpopurl</b>	<p>The DocPop link used when emailing DocPop links from the Unity Client.</p> <p>Replace <b>[servername]/[virtualdirectory]</b> with the web server name and virtual directory.</p>
<b>MaxConcurrentAutoVue Controls</b>	<p>This value specifies the maximum number of concurrent instances allowed for AutoVue controls. The default value is <b>3</b>. This setting only applies to modules which utilize AutoVue controls.</p> <hr/> <p><b>Note:</b> Increasing this value may decrease the performance of your system.</p> <hr/>

Setting Name	Description
<b>PlanReviewEngineeringViewer</b>	<p>This setting is used with the Electronic Plan Review module.</p> <hr/> <p><b>Caution:</b> This setting should not be modified unless you have been directed to do so by your solution provider.</p> <hr/> <p><b>Note:</b> An Electronic Plan Review license is required to use Electronic Plan Review in the Unity Client, for more information, see the Electronic Plan Review Module Reference Guide or help file.</p> <hr/>
<b>scanlog</b>	<p>This setting enables scan logging when set to <b>true</b>. The default value is <b>false</b>.</p> <hr/> <p><b>Note:</b> The <b>scanlog</b> setting is only respected when the <b>enableModernScanning</b> setting is set to <b>true</b>. For more information, see the <b>Document Imaging</b> module reference guide.</p> <hr/> <p>The log file can be opened from the <b>%LOCALAPPDATA%\Hyland Software, Inc\Hyland.Canvas.Controls\scanlog</b> directory for up to three days after closing the Unity Client after scanning. Log files older than three days will be deleted automatically.</p>

## Hyland.Canvas

The following settings are available in the **Hyland.Canvas** section of the Unity Client configuration file.

### DisplayLanguage

The interface is displayed in the Windows default operating system language.

To display the interface in a language different from the default operating system language, type the language code, such as **de-DE** for German or **fr-FR** for French. For more information on language codes, see [http://msdn.microsoft.com/en-us/library/ms533052\(VS.85\).aspx](http://msdn.microsoft.com/en-us/library/ms533052(VS.85).aspx).

---

**Note:** This setting is commented out by default. This means that this setting cannot be used until you remove the **<!--** preceding **<DisplayLanguage>** and the **-->** following **</DisplayLanguage>**.

---



---

**Note:** Personal Page tile names are displayed in the language that the Unity Client interface was in at the time the tile was created. The OnBase database collation must support the writing script of tile names.

---

When the **<DisplayLanguage>** tag is active, the language specified will display as the default language for the interface, regardless of the workstation's Windows language settings. This also applies to ClickOnce deployments.

The language specified during the creation of the ClickOnce deployment in the ClickOnce installer will be forced on all deployments of the application.

To override the display language which was configured initially, you can modify the configuration file for each individual user's workstation. The configuration file is located in the application directory inside of the ClickOnce application cache (e.g., **C:\Users\[user name]\AppData\Local\Apps**).

---

**Note:** Each time you update or create a new ClickOnce deployment instance, these settings must be manually reconfigured.

---

## Culture

The interface displays dates, time, currency, and numeric values using the default Windows locale settings configured in Regional and Language Options.

To override the default Windows locale in the interface, set the Culture to an ISO code such as **de-CH** for German (Switzerland).

---

**Note:** This setting is commented out by default. This means that this setting cannot be used until you remove the **<!--** preceding **<Culture>** and the **-->** following **</Culture>**.

---

---

**Note:** The **<DisplayLanguage>** and **<Culture>** settings are not required to match, except when **<DisplayLanguage>** is configured as Arabic (Saudi Arabia). When **<DisplayLanguage>** is configured as **ar-SA**, **<Culture>** must also be configured as **ar-SA**. However, when **<Culture>** is configured as **ar-SA**, the **<DisplayLanguage>** is not required to be **ar-SA**.

---

## Application

The **IsPersistentLogonEnabled** attribute controls persistent logon. It can be configured manually, or through the **Enable Persistent Logon** check box in a Unity Client ClickOnce deployment.

When set to **true**, users can use persistent logon. The **Remember me on this computer** check box is displayed in the log on dialog box. When this check box is selected, the Unity Client stores the user's credentials and uses them to automatically log on to OnBase during future sessions. Credentials are stored until the user manually logs off of OnBase using the **File** menu's **Log Out** button.

---

**Note:** If multiple Service Locations are configured, the **Remember me on this computer** check box will not be displayed even if the **IsPersistentLogonEnabled** attribute is set to **true**. This check box will only be displayed when one Service Location is configured for use with the Unity Client.

---

When set to **false**, persistent logon is not available.

---

**Note:** Credentials are not remembered when upgrading a Unity Client installation.

---

## DefaultHomeLayout

The web sites and RSS or Atom feeds displayed in the Unity Client's **Home** layout.

Web sites are included in the **<Websites>** node, and are defined in the following format:

```
<Website Name="[name of web site]" Url="[web site URL]"/>
```

---

**Note:** The **Name** attribute is optional. The **Url** attribute is required. When the **Name** attribute is not specified, the URL is used as the web site's name.

---

RSS or Atom feeds are included in the **<Feeds>** node, and are defined in the following format:

```
<Feed Url="[RSS or Atom feed URL]/>
```

When configuring the **DefaultHomeLayout** setting, ensure that you are aware of the following:

- Users are still able to configure web sites and RSS or Atom feeds through the Unity Client interface.
- If you completely remove the **DefaultHomeLayout** setting from the Unity Client configuration file, the default OnBase web sites and feed are used.
- If you modify the **DefaultHomeLayout** setting after using the Unity Client, you are required to delete the **IsolatedStorage** on the workstation before modifications are displayed in the Unity Client interface.

## UserGroupTimeoutMode

The **UserGroupTimeoutMode** attribute controls how OnBase determines if a user is active.

If set to **Request**, timeout is detected through lack of requests to the Application Server.

If set to **Windows**, timeout is detected through lack of user interaction with any application within a Windows session.

---

**Note:** This attribute is set to **Request** by default.

---

---

**Note:** This setting is only checked when User Group Timeout is configured. For more information, refer to the System Administration documentation.

---

## Hyland.Canvas.Automation.Services

The following setting is available in the **Hyland.Canvas.Automation.Services** section of the Unity Client configuration file:

Setting Name	Description
<b>VPDMailslot</b>	<p>When <b>enabled</b> is set to <b>true</b>, the Virtual Print Driver can be used with the Unity Client.</p> <p>When <b>deleteAfterUpload</b> is set to <b>true</b>, the <b>Delete Files After Import</b> option is automatically selected in the <b>Import</b> pane. When set to <b>false</b>, the <b>Delete Files After Import</b> option is not selected.</p> <p>Users are able to select or clear the <b>Delete Files After Import</b> option regardless of this setting's configuration.</p> <hr/> <p><b>Note:</b> For more information on using the Unity Client with the Virtual Print Driver, see the Virtual Print Driver documentation.</p> <hr/>

## Application Enabler

For Application Enabler to function, settings in the Unity Client's configuration file must be configured. These settings can be configured manually. Some can also be configured during the Unity Client's ClickOnce installation process.

The following attributes in the **<ApplicationEnabler>** tag are related to the Application Enabler module.

Attribute	Corresponding ClickOnce Option	Description
<b>EnableHandlingUnityClientEvents</b>	<b>Unity Features - Application Enabler</b>	<p>When set to <b>true</b>, the Unity Client can receive scrape events from Application Enabler.</p> <p>When set to <b>false</b>, the Unity Client cannot receive scrape events from Application Enabler.</p> <hr/> <p><b>Note:</b> You must manually add this attribute to the <b>&lt;ApplicationEnabler&gt;</b> tag. When this attribute is not present, it is treated as <b>true</b>.</p> <hr/>

Attribute	Corresponding ClickOnce Option	Description
<p><b>DefaultConfigFile</b></p>	<p><b>Default Configuration File</b></p>	<p>To automatically load a saved configuration when the Unity Client is opened, specify the full path to the file. The path to the configuration file can be a local path, UNC path, URL (HTTP or HTTPS), or a URN. When a default configuration is specified, the configured screen is enabled on startup. To start Application Enabler, click <b>AppEnabler</b>.</p> <hr/> <p><b>Note:</b> When a URL is specified for a file, the file is downloaded to a temporary directory from its specified location and the temporary file is opened. Any time the configuration file on the server is modified, you must restart IIS or reset the cache of the OnBase Application Server for changes to take effect.</p> <hr/> <p><b>Note:</b> To specify a custom temporary directory, create environment variable <b>ONBASETEMP</b> in the Windows Environment Variables configuration window, and enter the desired path in the <b>Variable value</b> field.</p> <hr/>

Attribute	Corresponding ClickOnce Option	Description
<b>UsePersistentWindowForRetrieval</b>		<p>When set to <b>true</b>, the Application Enabler - Retrieve Documents context uses the same window each time it is triggered. The window's size and position are also retained.</p> <p>When set to <b>false</b>, the Application Enabler - Retrieve Documents context uses a new window each time it is triggered. The window's size and position are not retained.</p>
<b>UsePersistentWindowForCustomQuery</b>		<p>When set to <b>true</b>, the Application Enabler - Run Custom Query context uses the same window each time it is triggered. The window's size and position are also retained.</p> <p>When set to <b>false</b>, the Application Enabler - Run Custom Query context uses a new window each time it is triggered. The window's size and position are not retained.</p>
<b>UsePersistentWindowForEformCreation</b>		<p>When set to <b>true</b>, the Application Enabler - Create New E-Form context uses the same window each time it is triggered. The window's size and position are also retained.</p> <p>When set to <b>false</b>, the Application Enabler - Create New E-Form context uses a new window each time it is triggered. The window's size and position are not retained.</p>

Attribute	Corresponding ClickOnce Option	Description
<b>UsePersistentWindowForFolderRetrieval</b>		<p>When set to <b>true</b>, the Application Enabler - Retrieve Folders context uses the same window each time it is triggered. The window's size and position are also retained.</p> <p>When set to <b>false</b>, the Application Enabler - Retrieve Folders context uses a new window each time it is triggered. The window's size and position are not retained.</p>
<b>UsePersistentWindowForWorkflowRetrieval</b>		<p>When set to <b>true</b>, the Application Enabler - Retrieve in Workflow context uses the same window each time it is triggered. The window's size and position are also retained.</p> <p>When set to <b>false</b>, the Application Enabler - Retrieve in Workflow context uses a new window each time it is triggered. The window's size and position are not retained.</p> <hr/> <p><b>Note:</b> In order for this attribute to work correctly with Workflow Retrieval, you must enable <b>Allow multiple instances of the Workflow layout</b> in the Unity Client's Workflow User Options.</p> <hr/>

---

**Note:** Persistent windows are shared among all contexts. For example, the **Application Enabler - Retrieve Documents** and **Application Enabler - Run Custom Query** contexts are configured to use the same Unity Client window each time they are triggered. If you trigger the **Application Enabler - Retrieve Documents** context and then trigger the **Application Enabler - Run Custom Query** context, the **Application Enabler - Run Custom Query** context will use the same window that the **Application Enabler - Retrieve Documents** context previously used.

---

**Caution:** Using the **Reset Cache** option in OnBase Configuration or the **Reset Server Cache** option in OnBase Studio may have a negative impact on system performance. Requests to the Application Server will be forced to wait until the cache is rebuilt before they can be processed. Depending on the size of the OnBase system, as well as the current server load, the performance impact of resetting the cache may be severe.

To avoid performance issues, only reset the cache of the Application Server during off-peak hours. For more information about the Reset Cache option in OnBase Configuration, see the System Administration documentation. For more information about the Reset Server Cache option in OnBase Studio, see the Studio documentation.

---

## HTTPS Automation

HTTPS Automation allows Application Enabler to expose an HTTPS endpoint to allow third-party applications to perform Application Enabler context events.

If HTTPS Automation is selected during installation, the location of the HTTPS certificate to be used must be specified in the **obunity.exe.config** file.

To specify the location of the HTTPS certificate:

1. Open the **obunity.exe.config** file.
2. In the `Hyland.Canvas.Automation.Services` node, locate `<HttpsAutomation enabled="false" port="15425" certificateLocation="" />`.
3. Set `enabled` to `"true"`.
4. Change the `port` setting, if required.
5. Set `certificateLocation` to the file path of the HTTPS certificate.
6. Save and close **obunity.exe.config**.

## Workflow

The Unity Client configuration file's **enableWorkflowDebugTrace** setting controls whether the **Debug Options** ribbon group is displayed on the **Developer** tab. When set to **true**, the **Debug Options** ribbon group is displayed. When set to **false**, the **Debug Options** ribbon group is not displayed.

## Configuring Unity Pop

Unity Pop is used to send links or shortcuts to content within OnBase to another user via external mail. There are two types of Unity Pops: Unity Pop files and Unity Pop links.

**Unity Pop files** are XML files that reference content in OnBase. Unity Pop files are the legacy method of creating Unity Pops.

**Unity Pop links** are URI links to content in OnBase. Unity Pop links are the recommended method of sending Unity Pops. Unity Pop links do not require a physical file and, therefore, do not take up disk space as a Unity Pop file would. Additionally, links can be easily shared by copying and pasting them into websites, documents, etc.

---

**Caution:** Do not switch to Unity Pop links if existing Unity Pop files are still in use by your organization.

---

To those sending and receiving Unity Pop files and links, the differences between the two types of Unity Pops will not be apparent. Both methods are sent through the **Send To | Mail Recipient (As Link)** menu option and, when opened, the Unity Client is launched to display the content in the appropriate layout.

---

**Note:** A Concurrent Client license is consumed while viewing Unity Pop files and links.

---

The configuration of Unity Pop files and Unity Pop links differ. The sections below outline the configuration of each Unity Pop method.

## Configuring Unity Pop Links

To configure Unity Pop links:

- Ensure that the user(s) have the **Create Integration Hyperlink** privilege. This can be set in the Configuration module. For more information on this privilege, refer to the **System Administration** Module Reference Guide
- Enable **Service Mode**. In the Unity Client configuration file (**obunity.exe.config**), find the **Hyland.Canvas.Client** section. There, you will find the **ServiceMode** element. Ensure that the element reads: **ServiceMode enabled="true"**
- Enable **Unity Pop**. Within the **ServiceMode** element of the Unity Client configuration file, find the **Unity Pop** feature. Ensure that the setting reads: **<Feature name="Unity Pop" enabled="true"/>**

For more information on enabling **Service Mode** refer to [Hyland.Canvas.Client on page 1](#).

- Set the **emailLinkAs** setting to "upop." Within the **appSettings** section of the Unity Client configuration file, find the **emailLinkAs** setting. Ensure that the setting reads: **<add key="emailLinkAs" value="upop"/>**

For more information on the **emailLinkAs** setting, refer to [appSettings on page 372](#).

## Configuring Unity Pop Files

Unity Pop files are the legacy method of creating Unity Pops. If you used Unity Pop in a version of OnBase prior to OnBase 14, you used Unity Pop files. The old method of configuring Unity Pop files (setting the **emailLinkAs** setting to "upop" in the Unity Client configuration file) is now part of the method to configure Unity Pop links, so care should be taken to ensure you are configuring the desired method of Unity Pop.

To configure Unity Pop files:

- Enable **Service Mode**. In the Unity Client configuration file (**obunity.exe.config**), find the **Hyland.Canvas.Client** section. There, you will find the **ServiceMode** element. Ensure that the element reads: **ServiceMode enabled="true"**
- Enable **Unity Pop**. Within the **ServiceMode** element of the Unity Client configuration file, find the Unity Pop feature. Ensure that the setting reads: **<Feature name="Unity Pop" enabled="true"/>**

For more information on enabling **Service Mode** refer to [Hyland.Canvas.Client on page 1](#).

- Set the **emailLinkAs** setting to "upop-file." Within the **appSettings** section of the Unity Client configuration file, find the **emailLinkAs** setting. Ensure that the setting reads: **<add key="emailLinkAs" value="upop-file"/>**

For more information on the **emailLinkAs** setting, refer to [appSettings on page 372](#).

## Requirements

### Unity Client Supported Operating Systems

- Windows Server 2008 R2 SP1 or later service pack
- Windows 7 SP1 or later service pack
- Windows 8.1
- Windows Server 2012 R2
- Windows 10 (1607 Anniversary Update, 1703 Creators Update, or 1709 Fall Creators Update)
- Windows Server 2016

---

**Note:** As of OnBase 16, the Windows Vista, Windows 8, Windows Server 2008, and Windows Server 2012 operating systems are no longer supported. If you are using any of these operating systems, you should not upgrade to OnBase 18 until you have upgraded to a Windows operating system supported by OnBase. For a complete list of operating systems that are no longer supported, see the **Technical Requirements Overview for New Installations and Upgrades** document.

---

### Unity Client Hardware Requirements

Component	Minimum	Recommended
<b>CPU</b>	1.6 GHz dual-core	2.4 GHz dual-core
<b>Memory (RAM)</b>	2 GB	4 GB
<b>Free Hard Disk Space (for installing and running the Unity Client)</b>	650 MB	
<b>Screen Resolution</b>	1024 x 768 (1280 x 800) <b>Note:</b> Using a lower resolution may result in a loss of functionality.	1280 x 1024 (1440 x 900 widescreen)

Component	Minimum	Recommended
Graphics Card	128 MB	256 MB with hardware acceleration support
Email Platform	Lotus Notes 8.5.x IBM Notes 9.0.x Microsoft Outlook 2010, 2013, or 2016 Novell GroupWise 2012 or 2014	
Media Player	Windows Media Player 10	

---

**Note:** The OnBase System Assessment Tool can be used to ensure that your workstation meets the minimum system requirements for the 18 OnBase Unity Client. For more information on this tool, see [System Assessment Tool on page 465](#).

---

## HTTPS Automation Requirements

If you are installing Application Enabler and you want to expose an HTTPS endpoint to allow third-party applications to perform Application Enabler context events, additional requirements must be met.

The following requirements must be configured prior to enabling HTTPS Automation:

- A domain that will resolve to **localhost**.
- An HTTPS binding public/private key pair for the domain, in .PFX format, that must be trusted by all client workstations.
- The password for the private key must be **OnBase**.
- The key pair must be stored somewhere accessible to all clients using HTTPS Automation (for example, distributed to every workstation or stored in a network share accessible via UNC).

If you need a URL and certificate to use with an HTTPS binding, contact your first line of support.

## Microsoft .NET Framework Requirements

OnBase requires Microsoft .NET Framework 4.6 or later. The .NET Framework can be obtained from the Microsoft Download Center at <http://www.microsoft.com/downloads>.

The version of the .NET Framework required by the module being installed must be installed on both the deployment and client machines before installation.

## Microsoft Visual C++ Requirements

The Web Server and both the 32-bit and 64-bit versions of the Application Server require the Microsoft Visual C++ Redistributable Packages listed below. If not already present on your server, these packages are installed when the **setup.exe** installer is used to install the OnBase Web or Application Servers.

---

**Note:** If the Web Server and Application Server are not installed on the same computer as the module(s) with which they are connecting, you must ensure that the following packages are also installed on the modules' workstations.

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The 32-bit Application Server requires the following:

- Microsoft Visual C++ 2010 Redistributable Package (x86)
- Microsoft Visual C++ 2015 Redistributable Package (x86)

The Web Server and the 64-bit Application Server require the following:

- Microsoft Visual C++ 2010 Redistributable Package (x86)
- Microsoft Visual C++ 2010 Redistributable Package (x64)
- Microsoft Visual C++ 2015 Redistributable Package (x64)

If you are using the Application Server in conjunction with the Unity Client, you must also ensure that the following are installed on the Unity Client's workstation:

- Microsoft Visual C++ 2005 Redistributable Package (x86)
- Microsoft Visual C++ 2010 Redistributable Package (x86)
- Microsoft Visual C++ 2013 Redistributable Package (x86)
- Microsoft Visual C++ 2015 Redistributable Package (x86)

## Databases Supported

The following sections list the databases supported in OnBase 18.

### Microsoft SQL Server

The following versions of Microsoft SQL Server™ are supported:

- Microsoft SQL Server 2008 (RTM, SP1, SP2, SP3, or SP4)
- Microsoft SQL Server 2008 R2 (RTM, SP1, SP2, or SP3)
- Microsoft SQL Server 2012 (RTM, SP1, SP2, SP3, or SP4)
- Microsoft SQL Server 2014 (RTM, SP1, or SP2)
- Microsoft SQL Server 2016 (RTM or SP1)
- Microsoft SQL Server 2017 (for Windows or Linux)

When using Microsoft SQL Server databases, also note the following:

- Microsoft SQL Server 2008 and Microsoft SQL Server 2008 R2 are being deprecated for eventual removal from the OnBase product suite. SQL Server 2008 and 2008 R2 are supported in OnBase 18; however, they will not be available in OnBase 19 and subsequent versions of OnBase. If you are currently using either Microsoft SQL Server 2008 or Microsoft SQL Server 2008 R2, Hyland Software recommends using Microsoft SQL Server 2012 or later to fulfill your needs.
- In April 2016, Microsoft discontinued technical support for Microsoft SQL Server 2005. As of release 17, Hyland Software no longer supports SQL Server 2005.
- If you are using an ODBC data source to connect to the database, you must ensure that your SQL Server database client software version matches or exceeds the database server version. For example, if your database server is SQL Server 2012, verify that the database client is SQL Server 2012 (or later). Running a previous client version, such as SQL Server 2008, will result in system instability and memory issues. For instructions on determining your server and client versions, see Database Client / Server Version Compatibility.

## Oracle

The following versions of Oracle® are supported:

- Oracle 11g (R2)
- Oracle 12c (R1 or R2)

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**Note:** All Oracle 11g and 12c drivers can be used.

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**Note:** If you are using an Oracle database, it is strongly recommended that you have a certified Oracle Database Administrator on staff.

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## SAP SQL Anywhere

Support for SAP SQL Anywhere™ databases is being deprecated for eventual removal from the OnBase product suite. Beginning in OnBase 18, new customers are required to use a supported version of a Microsoft SQL Server or Oracle database. However, the following versions of SAP SQL Anywhere are still supported for existing customers:

- SAP SQL Anywhere 16
- SAP SQL Anywhere 17

Beginning in OnBase 19, SAP SQL Anywhere databases will no longer be supported.

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**Note:** On December 31, 2016, SAP retired engineering support for SQL Anywhere versions 12.x and lower. As of OnBase 17, Hyland Software no longer supports SQL Anywhere versions 12.x and lower.

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## Database/File Servers

Server requirements are site-specific. Database/file servers should be dedicated purpose servers; that is, these servers should not be used as a domain controller, email server, print server, or proxy server. Network and disk I/O hardware should be optimized for performance and redundancy. Multiple network interface cards on servers are often required to minimize network bottlenecks.

## Hyland Software - Microsoft Service Pack Statement

The developers of OnBase are dedicated to ensuring the monthly cumulative updates released by Microsoft® are compatible with OnBase. On the second Tuesday of each month, the Quality Assurance Department of Hyland Software evaluates the cumulative fixes released and labeled as Critical or Important by Microsoft. The details of the update provided by Microsoft are reviewed for interaction with OnBase and installed when appropriate for testing its compatibility with OnBase. If you have questions regarding a specific Microsoft cumulative update and its compatibility with OnBase, please contact your support provider.

## Third-Party Software Compatibility

OnBase is used in conjunction with a variety of third-party software products. The specific versions of third-party software that are supported are documented in the requirements sections of this manual, which reflect the versions that were required at the time this manual was published.

For up-to-date information, visit the following site: [https://www.onbase.com/community/technical\\_communities/third\\_party\\_software\\_updates/default.aspx](https://www.onbase.com/community/technical_communities/third_party_software_updates/default.aspx).

## About Virtual Environments

Hyland Software develops, tests, and supports the OnBase suite of products on specific Operating Systems, not specific hardware configurations. When OnBase is operated in a virtual environment (such as Citrix, VMware, Hyper-V, or Windows Remote Desktop) there may be limitations or subtle differences imposed by the environment. The customer and the virtual environment vendor are responsible for any interactions or issues that arise at the Hardware or Operating System layer as a result of their use of a virtual environment.

When it appears that a performance-related issue in OnBase is either caused by (or is unique to) the virtual environment, organizations may be asked to validate that the issue occurs in a non-virtual environment. Hyland Software will make this request if there is reason to believe that the virtual environment is a contributing factor to the issue.

Each OnBase site is unique. Hyland Software depends on the customers who deploy OnBase in virtual environments to do so only after careful design and adequate planning (that takes into account the workloads of your organization), and in accordance with recommendations provided by the virtual environment's vendor. As with any implementation, Hyland Software strongly recommends that any customer deploying the OnBase solution in a virtual environment thoroughly test the solution before putting it into production.

For information about using OnBase in a Citrix and Microsoft Windows Remote Desktop environment, please see the **Citrix and Microsoft Windows Remote Desktop Environment Deployment Guide**, available on the Hyland Community (<https://www.onbase.com/community>).

## 64-Bit Support Statement

The OnBase suite of products is tested on 64-bit systems and is capable of being deployed on 64-bit systems using the Windows 32-bit on Windows 64-bit Emulator (WOW64) layer. However, OnBase modules that integrate with third-party applications may not be able to be used with the 64-bit versions of these applications. For these modules, only the 32-bit versions of these third-party applications are currently supported by the OnBase integrations. Consult the module-specific requirements section in each module reference guide for complete requirements details.

Supported database versions that are deployed on a 64-bit database server are also supported. For more information, contact your solution provider.

## Windows User Account Control Statement

Hyland Software is dedicated to ensuring that OnBase is compatible with Windows User Account Control (UAC). UAC is a feature of Windows operating systems that was introduced with Windows Vista. It limits the ability of standard users to make global system changes to a workstation and prevents malicious software from making unauthorized changes to protected areas.

For details on UAC, refer to your Microsoft support information or see [http://technet.microsoft.com/en-us/library/cc709691\(WS.10\).aspx](http://technet.microsoft.com/en-us/library/cc709691(WS.10).aspx).

You may encounter UAC in OnBase when:

- Installing or uninstalling OnBase, OnBase modules, or OnBase ActiveX controls.
- Copying, moving, or saving files to the Program Files directory, Windows directory, or another protected location.
- Modifying system-wide settings, such as the registry.
- Re-indexing a document or opening a scanned batch using published Internet Explorer from a Remote Desktop Server.

If Windows UAC is enabled, the above operations may prompt for administrator privileges or credentials, even if an administrator is currently logged on.

## Modifying Configuration Files

When UAC is enabled, administrators may be unable to modify Web.config or other \*.config files. To address this issue, the administrator should open a text editor (such as Notepad) by right-clicking it and selecting **Run as administrator**. The administrator can then open the \*.config file from within the text editor. Because the text editor is running with administrator privileges, the configuration file can be modified and saved using that application.

## Licensing

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

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**Note:** A Unity Client Server license is required for each server instance in your OnBase solution.

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## Digital Input Device Compatibility

Digital input devices, such as scanners and digital cameras, can use the Windows Image Acquisition (WIA) driver model. Depending on the module being used, devices that use TWAIN, Kofax, or ISIS can also be used.

To use Windows Image Acquisition (WIA) digital input devices to acquire images, the WIA Windows service must be configured with an **Automatic** or **Manual** Startup Type. For more information on WIA, including a complete list of devices compatible with WIA, see <http://www.microsoft.com>.

For more information on the TWAIN standard for image acquisition devices, see <http://www.twain.org>.

## Third-Party Software Requirements

Microsoft Office 2010 or greater is required to work with Microsoft Office documents in the Unity Client. Ensure that the latest Office service pack is installed.

Microsoft Outlook 2010 or greater, Lotus Notes 8.5.x, IBM Notes 9.0.x, or Novell GroupWise 2012 or 2014 is required to email documents in the Unity Client.

## Upgrade Considerations

The following upgrade considerations have been compiled by OnBase subject matter experts. These upgrade considerations are general and applicable to most OnBase solutions and network environments and should be considered each time an upgrade is performed.

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

For additional general information about upgrading OnBase, refer to the Upgrade Guidelines reference manual, and visit the Hyland Community at: <https://www.onbase.com/community>.

## General User Interface Redesign

As of OnBase 17, the Unity Client and Web Client have a new user interface design. The design changes do not affect functionality, but end users may find the new interface unfamiliar. If you are upgrading from OnBase 16 or earlier to OnBase 17 or later, review the changes to the user interface with end users, and ensure that any custom end-user documentation is updated accordingly.

## Server Machine Considerations

The following should be considered with regard to server machines:

- Ensure that the Unity Client version and build match the Application Server version and build.

## End-User Workstation Considerations

The following should be considered with regard to end-user workstations:

- Ensure that the proper compatible third party applications are installed (e.g., Adobe Acrobat, Microsoft Office).
- Ensure that the directory where the Unity Client is installed is added to the virus scanner white list.
- Make note of any settings in the Unity Client configuration file that have been modified from their default values.
- Ensure that the Application Server URL is correct in the `ServicePath` field of the Unity Client configuration file and can be accessed from a web browser. Verify the user does not receive certificate errors and is not prompted for authentication credentials.

## ClickOnce Deployment Considerations

The following should be considered with regard to ClickOnce deployments:

- Ensure that the environment in which the Unity Client will be deployed is not a Terminal Services environment.
- Ensure that the workstation environment can allow ClickOnce deployments to be installed.
- Ensure that any upgrades are made to existing deployments.

## General Deployment Considerations

In addition to the previous considerations, the following should be considered with regard to general deployments:

- Use of VBScript is not supported for HTML documents, E-Forms, or any document formats that rely on Internet Explorer for rendering. This is because VBScript is deprecated in Internet Explorer. Any functionality that depends on VBScripts should be updated to use JavaScript. For more information, see Microsoft's documentation on Disabling VBScript execution in Internet Explorer.

## Installation Overview

---

**Note:** Before installing the OnBase Unity Client, ensure you have a functioning OnBase Application Server. Ensure that the build of the OnBase Application Server matches the build of the OnBase Unity Client.

---

The Unity Client can be installed:

- Using the Hyland Unity Client Installer. For more information, see [Installation Using the MSI Installer on page 396](#).
- Using a ClickOnce Deployment. For more information, see [ClickOnce Deployment on page 412](#).
- Manually. For more information, see [Manual Installation on page 455](#).

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

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

---

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

---

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

For more information about configuring a silent installation, see <http://msdn.microsoft.com/en-us/library/aa367988.aspx>.

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

ClickOnce deployments also have the following advantages:

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

For more information on Microsoft's ClickOnce technology see [http://msdn.microsoft.com/en-us/library/142dbbz4\(VS.80\).aspx](http://msdn.microsoft.com/en-us/library/142dbbz4(VS.80).aspx).

---

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

---

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

---

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

---

**User Account Control (UAC)** – If Windows User Account Control (UAC) is enabled, the installer must be run with elevated administrator privileges, even if an administrator is currently logged on. This can be accomplished by right clicking on the installer executable and selecting **Run as Administrator** from the right-click menu. MSI files cannot be run using the **Run as Administrator** option. Instead, you must launch the MSI package using the command line. For more information on installing files through the command line, refer to your Microsoft support information or see [http://technet.microsoft.com/en-us/library/cc759262\(WS.10\).aspx](http://technet.microsoft.com/en-us/library/cc759262(WS.10).aspx).

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

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

The complete string of command-line parameters must be included in double quotes after the **CompleteCommandArgs** switch. If a parameter in the string also requires double quotes, those quotes must be escaped using \. For example: **setup.exe /q /CompleteCommandArgs "INSTALL\_PROPERTY=\"my value\" INSTALL\_PROPERTY\_2=\"my value 2\""**.

---

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

---

## Installer Prerequisites

The installer must be run on operating systems that support the Windows® Installer 3.0+ architecture.

The installer setup executable (**setup.exe**) detects most of the prerequisites for the module that are also required for installation and installs them, if necessary. If the installer fails to run, install all of the requirements for the module separately before relaunching the installer. Module requirements can be found in the installation chapters of the corresponding module reference guides.

---

**Note:** If installation is being performed using the installer MSI file, the requirements for the module must be installed before launching the installer.

---

## Installer User Permissions

You must be logged on to the installation machine with administrator privileges in order to run the installer.

If installing under Windows operating systems with UAC enabled, the installer must be run with elevated administrator privileges, even if the user currently logged in is an administrator.

## Installer .NET Framework Requirements

The installer must be run on a machine that meets the .NET Framework requirements of the module being installed. Module requirements can be found in the installation chapters of the corresponding module reference guides.

OnBase requires Microsoft .NET Framework 4.6 or later. The .NET Framework can be obtained from the Microsoft Download Center at <http://www.microsoft.com/downloads>.

# Installation Using the MSI Installer

## Running the Installer

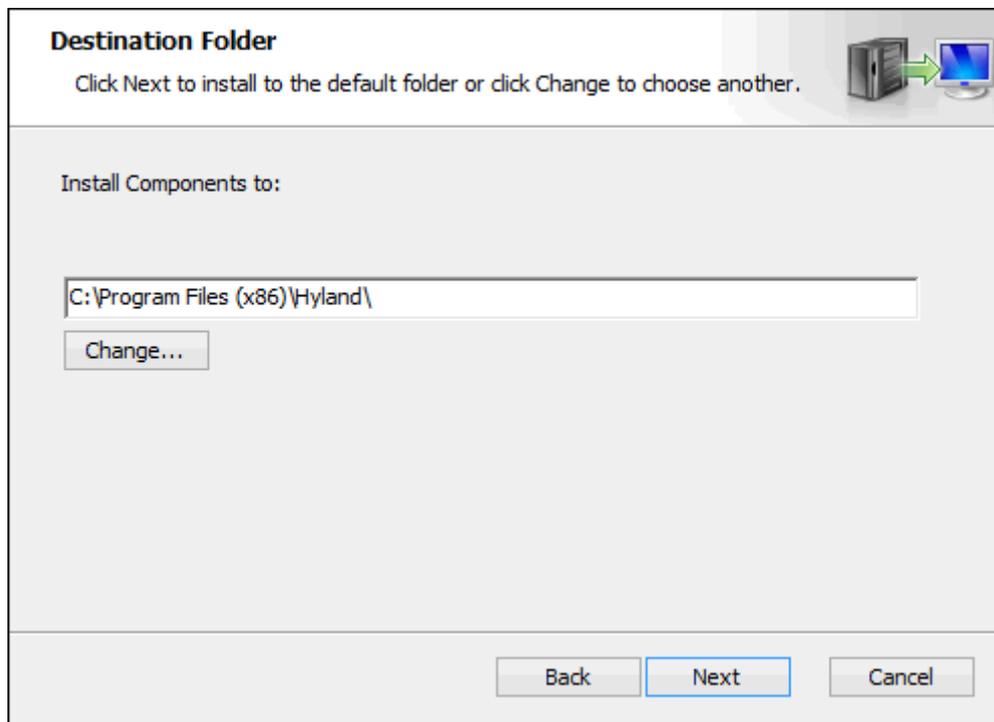
Launch the Hyland Unity Client installer by executing **setup.exe**. This executable is usually located in the **\install\Unity Client\** folder of your source installation files.

---

**Note:** If the installer is being copied from the source location to be run from a different location, the entire **Unity Client** folder and its contents must be copied to the new location.

---

1. The Hyland Unity Client installation welcome dialog is displayed.
2. Click **Next**. The **Destination Folder** dialog box is displayed.



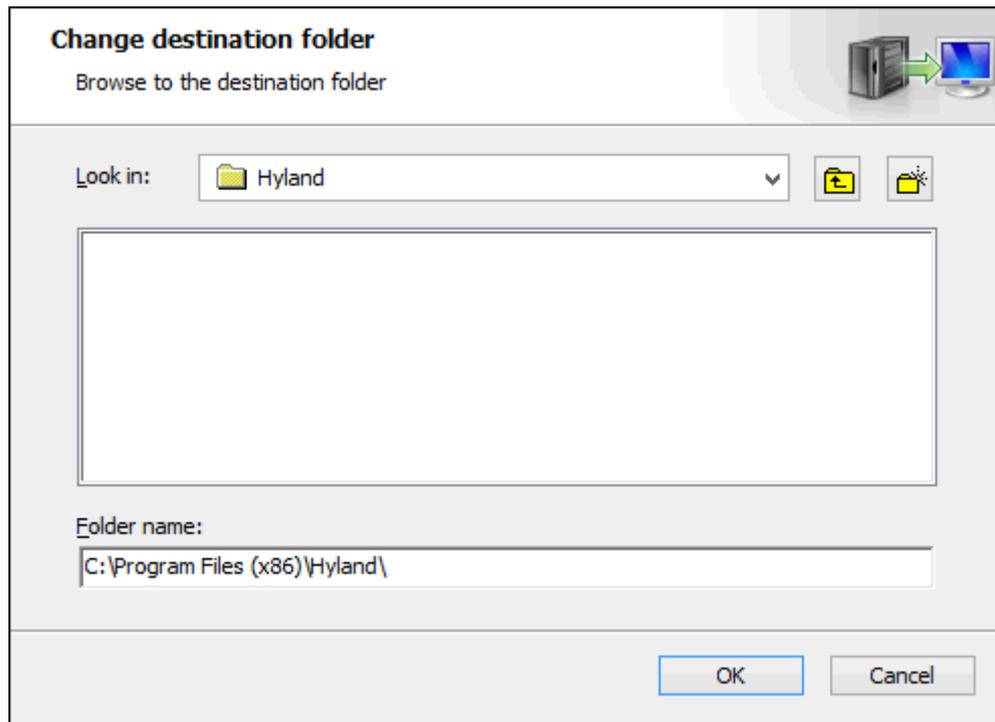
3. Enter the top-level installation directory in the field provided, or click **Change** to browse to it.

---

**Note:** This location does not affect components not installed under the top-level directory. If the installer provides for the installation of multiple components, the specific installation locations of each component can be changed later in the installation process.

---

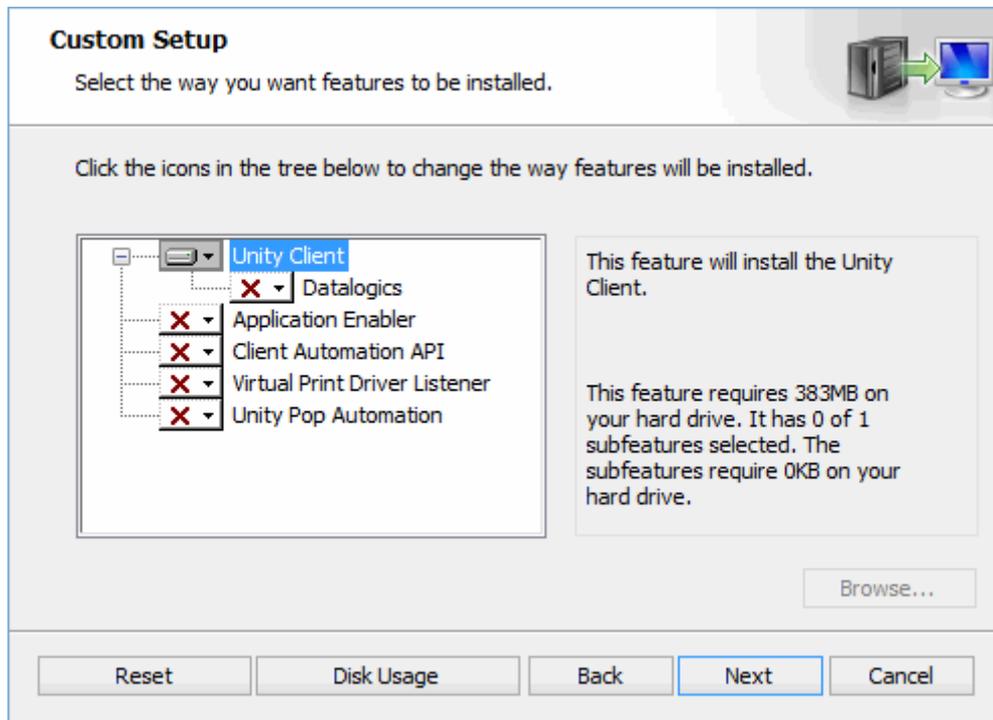
If **Change** is clicked the **Change destination folder** dialog box is displayed.



Enter a **Folder name** in the field provided or select it from the **Look in** drop-down select list, then click **OK**.

If the Destination Folder is not changed, the default location is used.

4. Click **Next**. The **Custom Setup** dialog is displayed.

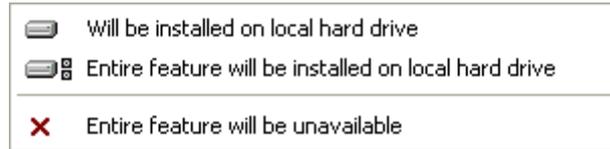


The following features can be installed using the Hyland Unity Client installer:

Component	Description
<b>Unity Client</b>	Installs the Unity Client. The Unity Client is a next-generation document management system that offers the familiar look-and-feel of Microsoft® Office® 2013.
<b>Datalogics</b>	Installs Datalogics.
<b>Application Enabler*</b>	Installs the Application Enabler module. Application Enabler provides a way to seamlessly integrate an organization's core line-of-business applications with OnBase.
<b>Client Automation API*</b>	Installs the Unity Client Automation API, which is used by third-party applications to automate the Unity Client.
<b>Virtual Print Driver Listener*</b>	Installs the Virtual Print Driver listener.
<b>Unity Pop Automation*</b>	Installs Unity Pop.

\* Because this component can only run when the Unity Client is in Service Mode, choosing to install this component automatically configures the Unity Client to run in Service Mode.

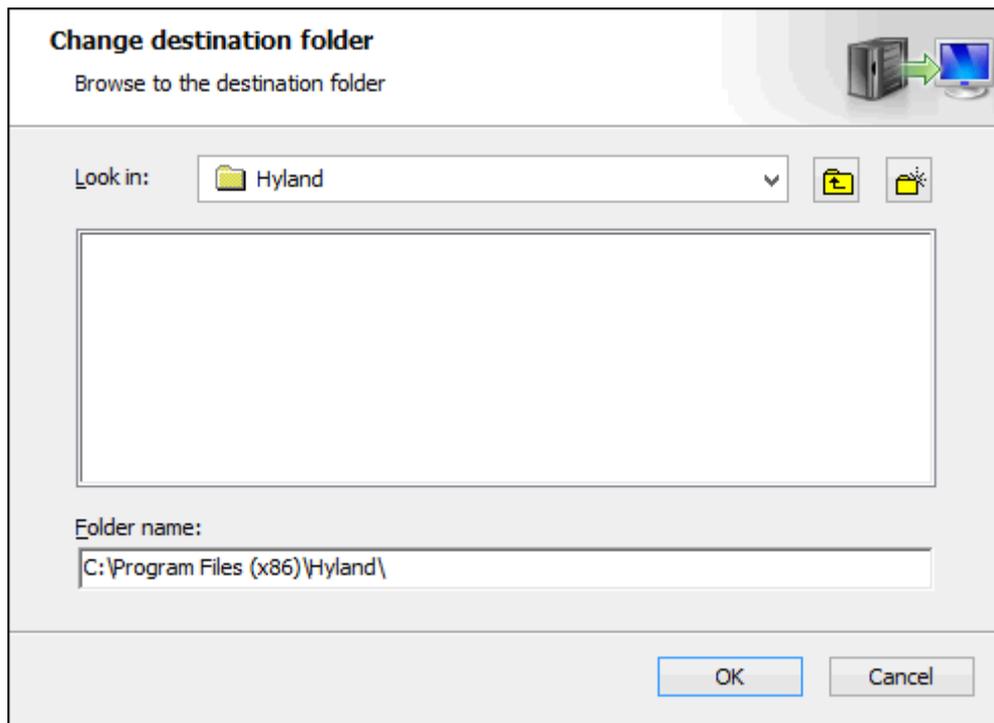
- Click the drop-down select list beside the name of a component to display the installation options:



Option	Description
<b>Will be installed on local hard drive</b>	Installs the selected feature and does not install any dependent, optional functionality. To view optional functionality, click the + icon next to the feature to expand the sub feature list.
<b>Entire feature will be installed on local hard drive</b>	Installs the selected feature and any dependent functionality. To view the dependent functionality, click the + icon next to the feature to expand the sub feature list.
<b>Entire feature will be unavailable</b>	Select this option to remove a feature from the list of features to install.

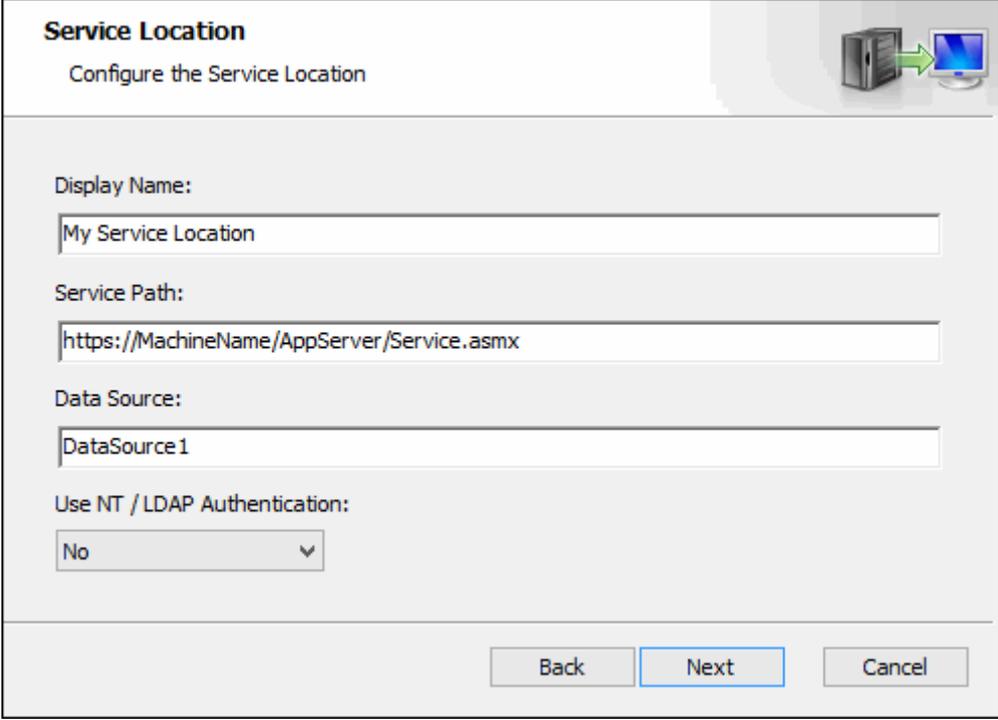
- Select **This feature will be installed on local hard drive** for each component you want to install.  
To install all components, select **Entire feature will be installed on local hard drive** from the drop-down select list beside the top-level component.
- To determine the amount of space available for installation of the selected components, click **Disk Usage**. The **Disk Space Requirements** dialog is displayed, with information on the space required for the selected components and the space available on the drives accessible by the installation machine.

- To change the installation location of a component, select it and click **Browse**. The **Change destination folder** dialog is displayed.



Enter a **Folder name** in the field provided or select it from the **Look in** drop-down select list. If the destination folder is not changed, components are installed to the default locations listed in the following table.

- Click **Next**. The **Service Location** dialog is displayed.



**Service Location**  
Configure the Service Location

Display Name:  
My Service Location

Service Path:  
https://MachineName/AppServer/Service.asmx

Data Source:  
DataSource1

Use NT / LDAP Authentication:  
No

Back Next Cancel

10. In the **Display Name** field, enter a user-friendly name for the service location.
11. In the **Service Path** field, enter the full URL to the **Service.asmx** page on the OnBase Application Server. For example, **https://MachineName/AppServer/Service.asmx**.

---

**Note:** Ensure that the **Service Path** reflects the configuration of the OnBase Application Server in regard to HTTPS bindings. If the Application Server is not configured to use HTTPS, setting the Service Path to HTTPS in this installer does not configure an HTTPS binding on the OnBase Application Server.

---

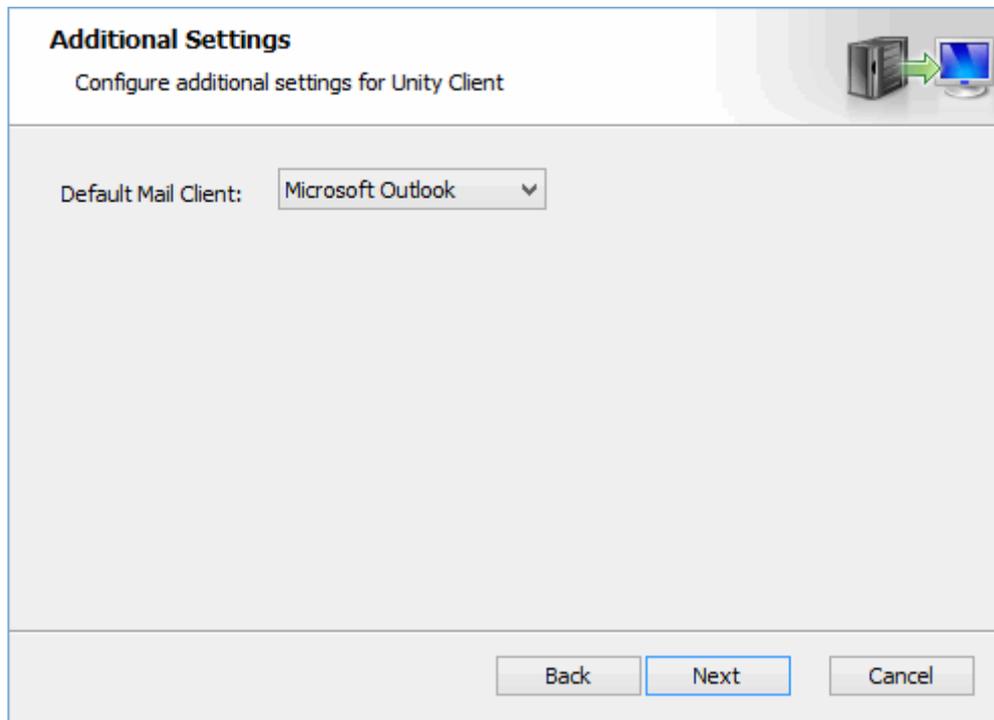
12. In the **Data Source** field, enter the data source name this component will use to connect to OnBase.
13. Select **Yes** from the **Use NT / LDAP Authentication** drop-down select list if your system uses Active Directory or LDAP Authentication, otherwise select **No**.

---

**Note:** In order to use Active Directory or LDAP authentication, the database against which the installed component runs must be separately configured for Active Directory or LDAP authentication. This installer configures the installed components to match the authentication scheme of the database but does not configure Active Directory or LDAP.

---

14. Click **Next**. The **Additional Settings** dialog is displayed.



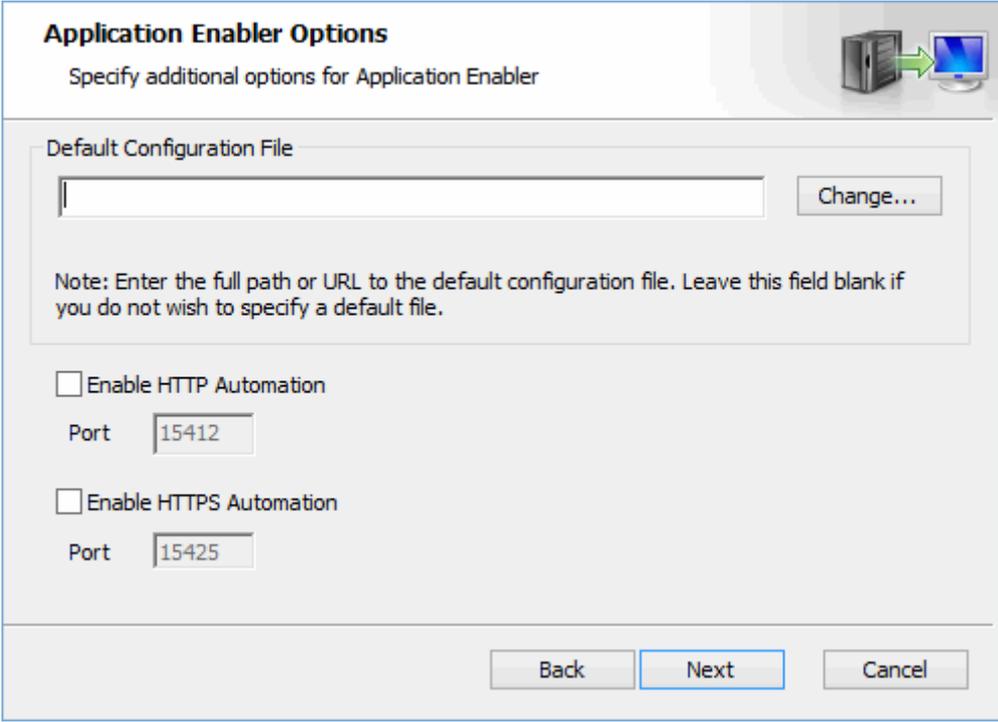
In the **Default Mail Client** drop-down select list, select the default email client that users will use to send external mail from within the Unity Client.

If you chose to install **Unity Pop Automation**, the **Additional Settings** dialog includes Unity Pop options.

In the **Unity Pop option** drop-down select list, select the Pop integration option that will be used for document retrieval and viewing.

Option	Description
<b>DocPop Link</b>	Select this option to use DocPop. The <b>DocPop URL</b> field will become available. For more information, see the <b>DocPop</b> module reference guide.
<b>Unity Pop File</b>	Select this option to use Unity Pop Files. For more information, see <a href="#">Viewing Unity Pop Files and Links on page 270</a> and <a href="#">Configuring Unity Pop on page 383</a> .
<b>Unity Pop Link</b>	Select this option to use Unity Pop Links. For more information, see <a href="#">Viewing Unity Pop Files and Links on page 270</a> and <a href="#">Configuring Unity Pop on page 383</a> . <hr/> <b>Caution:</b> Do not select Unity Pop Link if existing Unity Pop files are still in use by your organization. <hr/>

15. Click **Next**. If you chose to install **Application Enabler Client**, the **Application Enabler Options** dialog is displayed.



**Application Enabler Options**  
Specify additional options for Application Enabler

Default Configuration File

Change...

Note: Enter the full path or URL to the default configuration file. Leave this field blank if you do not wish to specify a default file.

Enable HTTP Automation  
Port 15412

Enable HTTPS Automation  
Port 15425

Back Next Cancel

- f. In the **Default Configuration File** field, enter the full URL or UNC path to the default configuration file that Application Enabler should use (for example, **\\FileServer\Apps\ApplicationEnabler\DefaultFile.xml**), or click **Change** to navigate to the file to use. Leave this field empty to not configure a default file.
- g. Select **Enable HTTP Automation** to expose an HTTP endpoint to allow third-party applications to perform Application Enabler context events.
- h. If **Enable HTTP Automation** is selected, type the port number for the HTTP endpoint in the **Port** field. The default value is 15412.
- i. Select **Enable HTTPS Automation** to expose an HTTPS endpoint to allow third-party applications to perform Application Enabler context events.

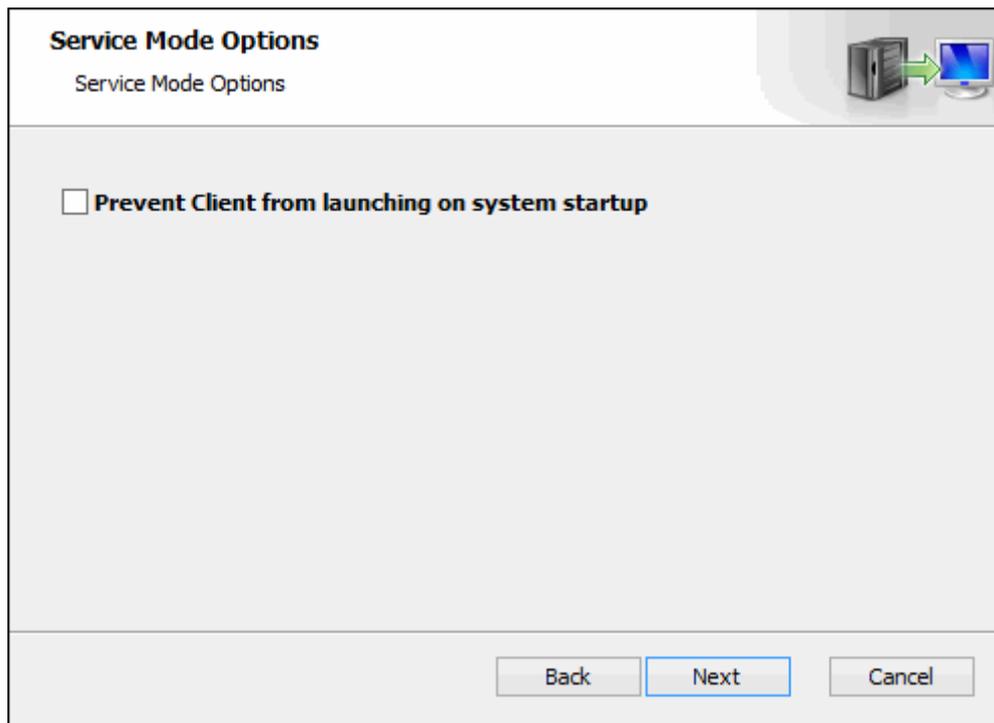
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**Note:** HTTPS Automation requires additional configuration after installation.

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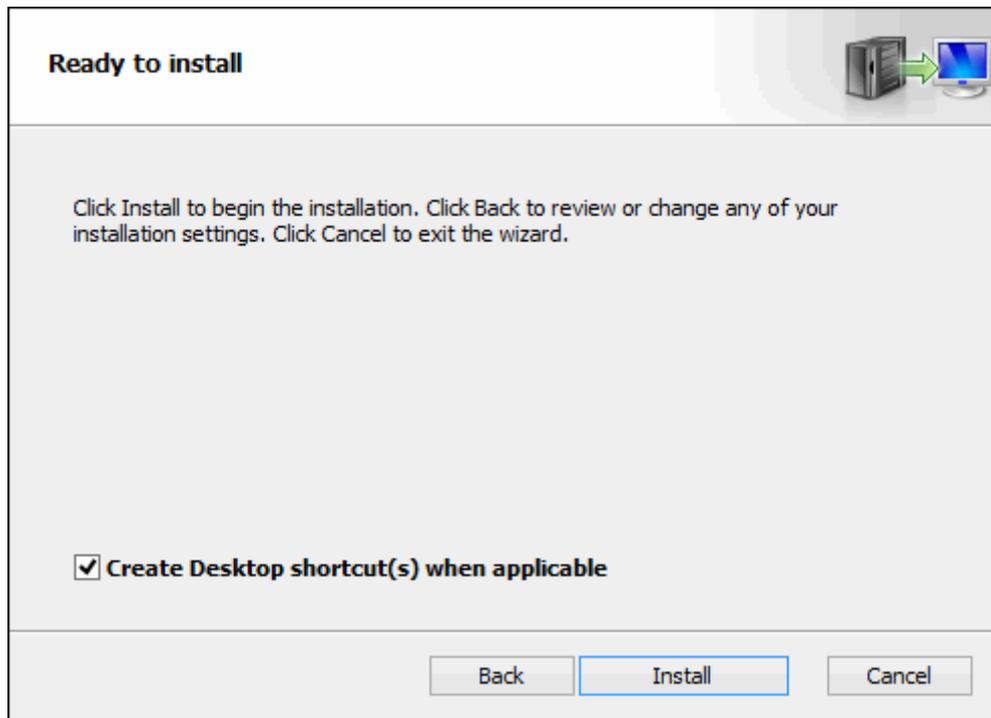
- j. If **Enable HTTPS Automation** is selected, type the port number for the HTTPS endpoint in the **Port** field. The default value is 15425.

16. Click **Next**. If you chose to install any of the Service Mode components, the **Service Mode Options** dialog is displayed.



Select **Prevent Client from launching on system startup** to prevent the Client from automatically launching when the system starts.

17. Click **Next**. The **Ready to install** dialog is displayed.



18. Select **Create Desktop shortcut(s) when applicable** to create shortcuts to the installed components in the Windows **Start | All Programs | Hyland** menu, on the Windows desktop, or in both locations, when applicable.
19. Click **Install** to continue with the installation, or click **Cancel** to cancel the installation.
20. When the installation is complete, click **Finish**.

---

**Tip:** In order to ensure that the required system settings take effect, it is a best practice to restart the installing machine once the installer has finished.

---

---

**Note:** Some functionality must be configured directly in the configuration file. See [Post-Installation on page 412](#).

---

## Change, Repair, or Remove an Installation

After initial installation, the setup program can be used to change, repair, or remove components from a previous installation. After launching **setup.exe** or the \*.msi installation package, and clicking **Next** at the welcome dialog, the **Change, repair, or remove installation** dialog box is displayed.

Select the option for the actions you wish to perform:

Option	Description
<b>Change</b>	<p>Add or remove components using the <b>Custom Setup</b> dialog.</p> <hr/> <p><b>Note:</b> This option is not available if the installer has no independently selectable features.</p> <hr/> <p>The steps for adding selected components are the same as those under the Component Selection section of the installation instructions, if applicable to the installer.</p> <hr/> <p><b>Note: Change</b> does not allow you to alter configuration options originally set during a previous installation of components contained in the installer.</p> <hr/>
<b>Repair</b>	<p>Repair errors in the most recent installation of the component, such as missing and corrupt files, shortcuts, and registry entries.</p> <hr/> <p><b>Note:</b> This option is not available from all installers. <b>Repair</b> does not include errors made in the configuration options set by the user during installation. For specific troubleshooting information regarding an installed component, see the module reference guide for that component.</p> <hr/>
<b>Remove</b>	Removes all previously installed components.

## Running the Installer from the Command Line

You can control the installation of components from the command line by passing its feature name to the installer using the **ADDLOCAL** property. The values of the configuration options available in the graphical installation wizard are passed to the installer using the property names associated with the installer options.

This section describes the feature names and properties associated with this installer.

---

**Note:** Feature and Property names are case sensitive.

---

## Feature Names

To install the components contained in this installer, the value of the **ADDLOCAL** property must use the following Feature Names:

Component	Feature Name
Unity Client	Unity_Client
Datalogics	UnityClient_Datalogics
Application Enabler*	ApplicationEnabler
Client Automation API*	UnityClientAutomation
Virtual Print Driver Listener*	VirtualPrintDriverListener
Unity Pop Automation*	UpopAutomation

\* Because this component can only run when the Unity Client is in Service Mode, choosing to install this component automatically configures the Unity Client to run in Service Mode.

The **ADDLOCAL** property is added to the installation command line, as shown here:

**msiexec /i "Hyland Unity Client.msi" ADDLOCAL=Unity\_Client,ApplicationEnabler**

## Properties

When controlling the installation of components from the command line you must also configure the settings for each component you are installing by using the properties listed in the following table. If a property is not included, the default value is configured for that property.

Property	Description
<b>AE_DEFAULTFILE</b>	The full URL or UNC path to the default configuration file that Application Enabler should use. Leave this property empty to not configure a default file. By default, this property is empty. For example: <b>AE_DEFAULTFILE="\\FileServer\Apps\ApplicationEnabler\DefaultFile.xml"</b>
<b>CREATE_DESKTOP_SHORTCUTS</b>	Set to <b>1</b> to add desktop shortcuts for the installed component, or leave empty to not add the shortcuts. By default, this property is empty. For example: <b>CREATE_DESKTOP_SHORTCUTS="1"</b> or <b>CREATE_DESKTOP_SHORTCUTS=""</b>

Property	Description
<b>CREATE_MENU_SHORTCUTS</b>	<p>Set to <b>1</b> to add program menu shortcuts for the installed component, or leave empty to not add the shortcuts. By default, this property is set to <b>1</b>.</p> <p>For example: <b>CREATE_MENU_SHORTCUTS="1"</b> or <b>CREATE_MENU_SHORTCUTS=""</b></p>
<b>SERVICE_LOCATION_DATA_SOURCE</b>	<p>The ODBC connection for the data source installed components will use to connect to OnBase. By default, this property is set to <b>{DataSource}</b>.</p> <p>For example: <b>SERVICE_LOCATION_DATA_SOURCE="ODBC source name"</b></p>
<b>SERVICE_LOCATION_DISPLAY_NAME</b>	<p>A user-friendly name for the service location. By default, this property is set to <b>New Service Location</b>.</p> <p>For example: <b>SERVICE_LOCATION_DISPLAY_NAME="My Service Location"</b></p>
<b>SERVICE_LOCATION_NT_AUTH</b>	<p>Set to <b>true</b> if your system uses Active Directory or LDAP authentication, or set to <b>false</b> if it does not. By default, the <b>SERVICE_LOCATION_NT_AUTH</b> property is set to <b>false</b>.</p> <hr/> <p><b>Note:</b> In order to use Active Directory or LDAP authentication, the database against which the installed component runs must also be configured for Active Directory or LDAP authentication. The installer configures the installed component to match the authentication scheme of the database.</p> <hr/> <p>For example: <b>SERVICE_LOCATION_NT_AUTH="true"</b> or <b>SERVICE_LOCATION_NT_AUTH="false"</b></p>
<b>SERVICE_LOCATION_SERVICE_PATH</b>	<p>The full URL to the <b>Service.asmx</b> page on the OnBase application server. By default, this property is set to <b>https://{WebSite}/{Directory}/Service.asmx</b>.</p> <p>For example: <b>SERVICE_LOCATION_SERVICE_PATH="http://MachineName/AppServer/Service.asmx"</b></p>

Property	Description
<b>UNITYCLIENT_AE_HTTPAUTOMATION</b>	<p>Set to <b>1</b> to enable HTTP Automation for Application Enabler, or leave empty to not enable HTTP Automation for Application Enabler. By default, this property is empty.</p> <p>For example:  <b>UNITYCLIENT_AE_HTTPAUTOMATION="1"</b> or  <b>UNITYCLIENT_AE_HTTPAUTOMATION=""</b></p>
<b>UNITYCLIENT_AE_HTTPSAUTOMATION</b>	<p>Set to <b>1</b> to enable HTTPS Automation for Application Enabler, or leave empty to not enable HTTPS Automation for Application Enabler. By default, this property is empty.</p> <p>For example:  <b>UNITYCLIENT_AE_HTTPSAUTOMATION="1"</b>  or <b>UNITYCLIENT_AE_HTTPSAUTOMATION=""</b></p> <hr/> <p><b>Note:</b> If HTTPS Automation is selected during installation, the location of the HTTPS certificate to be used must be specified in the <b>obunity.exe.config</b> file. For more information, see <a href="#">Post-Installation on page 412</a>.</p> <hr/>
<b>UNITYCLIENT_AE_HTTPS_PORT</b>	<p>The secure port number Application Enabler will use if HTTPS Automation is enabled. By default, this property is set to <b>15425</b>.</p> <hr/> <p><b>Note:</b> Valid values are any integer <b>1</b> to <b>65535</b>.</p> <hr/>
<b>UNITYCLIENT_AE_PORT</b>	<p>The port number Application Enabler will use if HTTP Automation is enabled. By default, this property is set to <b>15412</b>.</p> <hr/> <p><b>Note:</b> Valid values are any integer <b>1</b> to <b>65535</b>.</p> <hr/>

Property	Description
<b>UNITYCLIENT_DEFAULT_MAIL_CLIENT</b>	<p>The default mail client for Unity Client. By default, this property is set to <b>outlook</b>.</p> <hr/> <p><b>Note:</b> Valid values are <b>outlook</b>, <b>lotus</b>, <b>groupwise</b>, and <b>gmail</b>.</p> <hr/> <p><b>Note:</b> When Microsoft Outlook and Novell GroupWise are installed on the same machine, using GroupWise as the Default Mail Client for the Unity Client may result in unexpected behavior and is not supported.</p> <hr/> <p>For example:  <b>UNITYCLIENT_DEFAULT_MAIL_CLIENT="outlook"</b> or  <b>UNITYCLIENT_DEFAULT_MAIL_CLIENT="lotus"</b></p>
<b>UNITYCLIENT_DOCPOP_URL</b>	<p>The URL that will be used when sending DocPop links. By default, this property is set to <b>http://[server]/[virtual directory]/docpop/docpop.aspx?docid={0}&amp;clienttype=html</b>.</p> <p>For more information on DocPop links, see the <b>DocPop</b> module reference guide.</p>
<b>UNITYCLIENT_POP_OPTION</b>	<p>The Unity Pop option to set. Set to <b>disabled</b>, <b>upop</b> (Unity Pop Link), <b>upop-file</b> (Unity Pop File), or <b>weblink</b> (DocPop Link). By default, this property is set to <b>upop</b>.</p> <p>For example:  <b>UNITYCLIENT_POP_OPTION="disabled"</b> or  <b>UNITYCLIENT_POP_OPTION="upop"</b></p>
<b>UNITYCLIENT_SERVICEMODE_DISABLEAUTORUN</b>	<p>Set to <b>1</b> to prevent Unity Client from launching on system startup, or leave blank to allow Unity Client to launch on system startup. By default, this property is empty.</p> <p>For example:  <b>UNITYCLIENT_SERVICEMODE_DISABLEAUTORUN="1"</b> or  <b>UNITYCLIENT_SERVICEMODE_DISABLEAUTORUN=""</b></p>

Properties are added to the installation command line, as shown here:

```
msiexec /i "Hyland Unity Client.msi" ADDLOCAL=Unity_Client
SERVICE_LOCATION_DATA_SOURCE="My ODBC"
SERVICE_LOCATION_SERVICE_PATH="http://MyMachineName/AppServer/Service.asmx"
```

## Post-Installation

Some functionality must be configured directly in the configuration file. For general information about making changes to the **obunity.exe.config** file, see [The Unity Client Configuration File on page 368](#).

### AD FS Configuration

For information on how to configure the Unity Client for AD FS, see the **Authentication** module reference guide.

### HTTPS Automation

For information on HTTPS Automation requirements, see [HTTPS Automation Requirements on page 386](#).

If HTTPS Automation is selected during installation, the location of the HTTPS certificate to be used must be specified in the **obunity.exe.config** file.

To specify the location of the HTTPS certificate:

1. Open the **obunity.exe.config** file.
2. In the `Hyland.Canvas.Automation.Services` node, locate `<HttpsAutomation enabled="false" port="15425" certificateLocation="" />`.
3. Set `enabled` to `"true"`.
4. Change the `port` setting, if required.
5. Set `certificateLocation` to the file path of the HTTPS certificate.
6. Save and close **obunity.exe.config**.

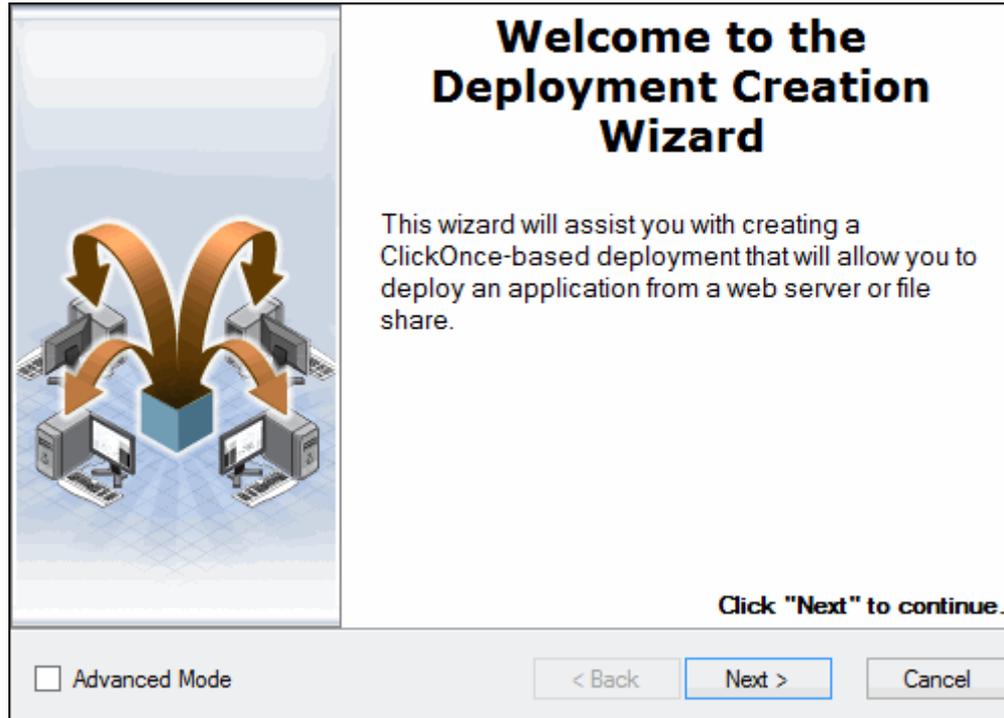
## Installation Using ClickOnce

### ClickOnce Deployment

To install a ClickOnce deployment of the Unity Client:

1. Launch the installer using `setup.exe`. This file is typically located in the `In the \ClickOnce\Unity Client` folder of your source installation files. The **Welcome...** dialog box is displayed.
2. Click **Next**. The **Ready to install...** dialog box is displayed.
3. Click **Install**. The deployment setup is installed.

- Click **Launch** or **Finish**, depending on the module being installed. The **Welcome to the Deployment Creation Wizard** dialog is displayed.



Select **Advanced Mode** to enable the ability to update certain aspects of the installation where the default values are populated by the installer. Not selecting this option automatically uses the default values populated by the installer.

---

**Caution:** Any necessary changes to the files in the deployment folder or the contents of the deployment folder, such as custom changes to the \*.config file for the module, must be made before clicking **Next** at the **Deployment Signing** dialog box. If you are in Advanced Mode, you still have the option to edit files in the deployment folder at the **File Edit Notification** dialog box that is displayed after the **Deployment Signing** dialog box.

---

---

**Note:** If your servers are configured to use an HTTPS binding, or you are going to enable Active Directory or LDAP Authentication, you should enable **Advanced Mode** in order to be able to configure these options in your deployment.

---

- Click **Next**. The **Instance Settings** dialog box is displayed.

---

**Note:** If the **Package Selection** dialog box is displayed, select the package to deploy then click **Next** to reach the **Instance Settings** dialog box.

---

**Instance Settings**

How do you want to uniquely identify your deployment?

**Instance Name**  
If updating an existing deployment, choose the appropriate instance name from the list. If creating a new deployment, enter a new instance name. (Example: Production, Testing)

[Dropdown Menu] [Add...]

**Deployment Version Number**  
The deployment version number is used by clients to determine if they need to be updated, and is not related to the application version.

1 . 0 . 0 . 0

Require clients to upgrade to version 1.0.0.0

[< Back] [Next >] [Cancel]

- Select the name of the application instance from the drop-down select list under the **Instance Name** section. To create a new instance name:
  - Click the **Add** button to the right of the drop-down select list. The **Create New Instance** dialog box is displayed.

Please enter the name of the new instance:

[Text Input Field]

[OK] [Cancel]

---

**Note:** If you create a new instance name for an existing deployment, the package must be redeployed to client machines under the new instance name.

---

- b. Enter a name for the new instance in the field provided. The name entered is used to distinguish this deployment from other deployments, so it must be unique.

---

**Note:** The instance name cannot contain any of the following characters: [ ] < > , ; : + = " / \ | ? \* # '

---

- c. Click **OK**.
7. The **Deployment Version Number** fields can be used to manually set a new version number for this deployment. This number is used by client machines to determine if the application installed needs to be updated.  
The **Deployment Version Number** is incremented automatically by the deployment wizard. The initial Deployment Version Number is **1.0.0.0**, and there is no need to change this number.

---

**Note:** The **Deployment Version Number** is not available unless **Advanced Mode** is selected on the **Welcome to the Deployment Creation Wizard** dialog. To enable the **Deployment Version Number**, click **Back** and select **Advanced Mode** on the **Welcome to the Deployment Creation Wizard** dialog.

---

8. Select the **Require clients to upgrade to version** check box to force client machines to upgrade to the current instance. This option is selected by default.
9. Click **Next**. The **Deployment Location** dialog box is displayed.

**Deployment Location**

Where would you like to deploy \_\_\_\_\_?

**Deployment Folder**

Enter or choose the path to where you wish to deploy the files. The path may be local or on a network share.

10. Click **Change** beside the **Deployment Folder** field to select a different folder. The **Deployment Folder** can be a local path or network location and is the folder to which the application files are copied on the deployment server.

---

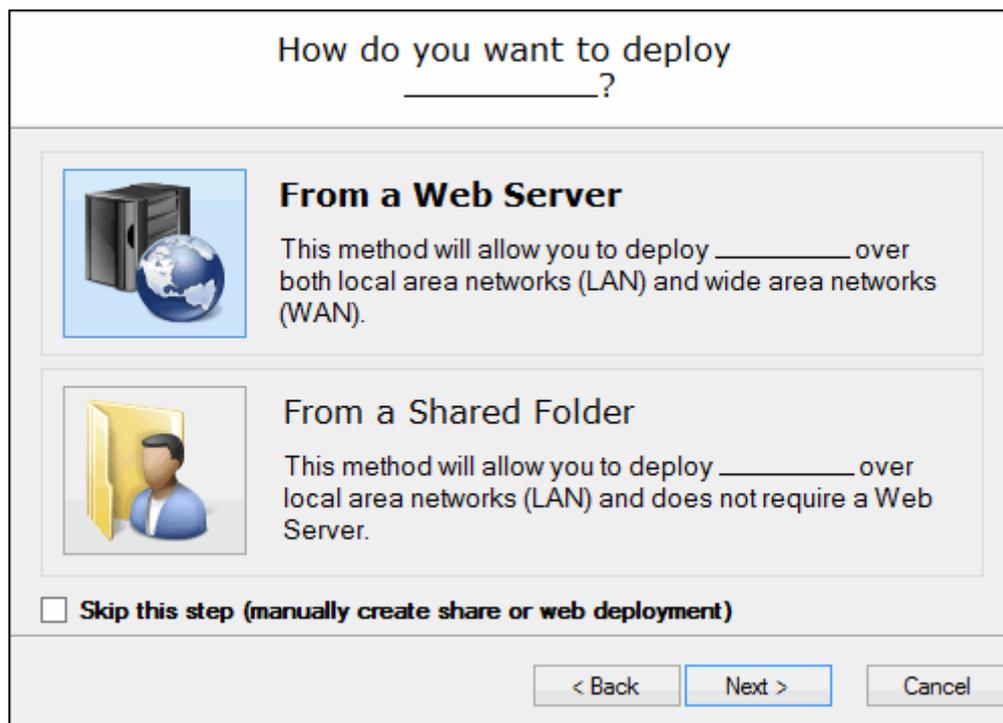
**Note:** If you are updating an existing deployment, you cannot change the **Deployment Folder**. If you create a new instance with a different Deployment Folder, the old deployment is not updated and the package must be redeployed to client machines with the new Deployment Folder location.

---

**Caution:** Files in the **Deployment Folder** selected are overwritten.

---

11. Click **Next**. The **How do you want to deploy...?** dialog is displayed.



12. Click the **Web Server** icon to deploy the application to client workstations via a URL (e.g., <https://web-server/Application/DeployedApp.application>).

---

**Note:** If IIS is not installed, you cannot select **Web Server** and must deploy the application via a UNC path.

---

Click the **From a Shared Folder** icon to deploy the application to client workstations via a UNC path (e.g., `\\machine-name\Application\DeployedApp.application`).

---

**Note:** The **From a Shared Folder** option is not available if deploying to a network location (e.g., `\\MyServer\MyShare`).

---

Select **Skip this step** to configure the deployment folder manually as a shared folder or a virtual directory.

13. Click **Next**.

- For **Web Server** installations, go to the [Web Server Installation Steps](#).
- For **From a Shared Folder** installations, go to the [From a Shared Folder Installation Steps](#).
- If **Skip this step** is selected, go to the [Manually Created Share Steps](#).

## Web Server Installation Steps

If you are installing the deployment package to a Web server, the Web server must be added to the **Local intranet** zone in Microsoft Internet Explorer. Zones are configured in Internet Explorer by selecting the **Security** tab of the **Internet Options** (available from the **Tools** menu). You must also **Enable** the following Security settings:

- **Automatic prompting for file downloads**
- **File download**
- **Font download**

---

**Tip:** For complete details on adding and configuring sites in the Local Intranet Zone, see the Microsoft Internet Explorer help files.

---

After selecting **Web Server** at the **How do you want to deploy...?** dialog box, the **Configure Virtual Directory** dialog is displayed:

**Configure Virtual Directory**

What Virtual Directory do you want to deploy \_\_\_\_\_ from?

**Web Site:**  
Default Web Site

**Protocol:**  
https

**Host Name:**  
DOC-012604

**Virtual Directory:**  
ApplicationNameRS2

< Back    Next >    Cancel

1. Select the **Web Site** to create the virtual directory under from the drop-down select list.

---

**Note:** The application generated by the deployment wizard uses the security settings from the Default Web Site in IIS.

---

2. Select a **Protocol** from the drop-down select list. This allows you to configure the installed application to use the **https** protocol if an HTTPS binding is available.
3. Enter the **Host Name** of the **Web Site** selected, or accept the default host name presented. In some cases, such as with an HTTPS binding, the default value may need to be changed to match the host name in the certificate.

To specify a port to use for this connection, include the port number in the host name: **<host name>:<port>** (e.g., **DEV-007832:82**).

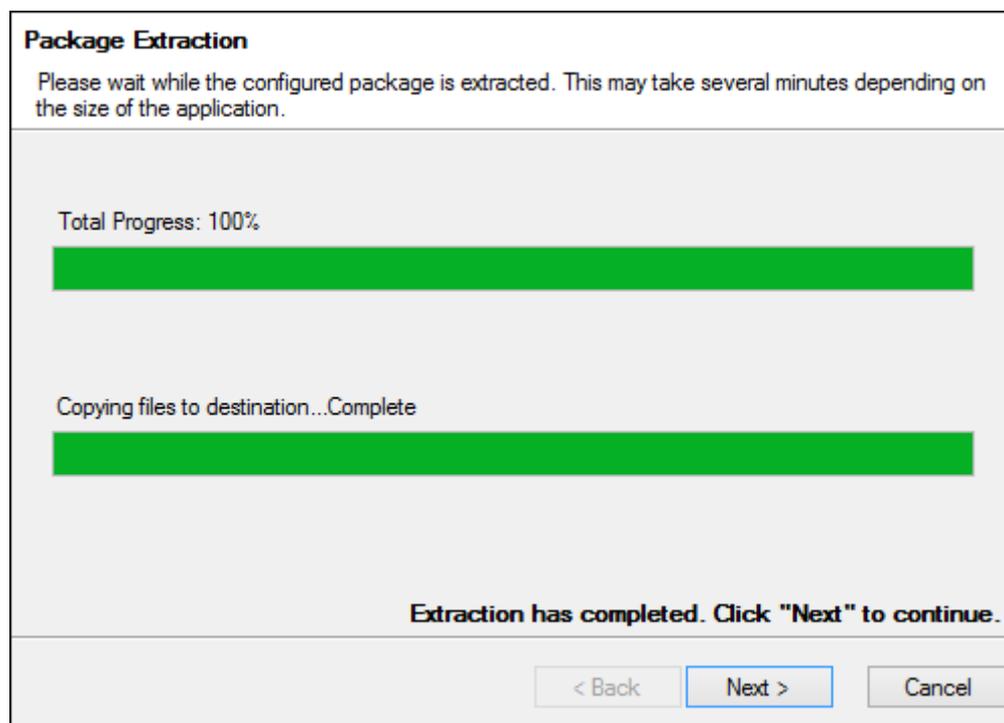
4. Enter a name for the **Virtual Directory** in the field provided. This is the name of the virtual directory created under the Web server selected.

---

**Note:** If a virtual directory with the same name already exists, the existing virtual directory is configured to point to the **Deployment Folder** configured. The following special characters cannot be used in the Virtual Directory name: \ ? ; : @ & = + \$ , | " < > \*.

---

5. Click **Next**. The **Package Extraction** dialog is displayed, which displays the progress of the installation.

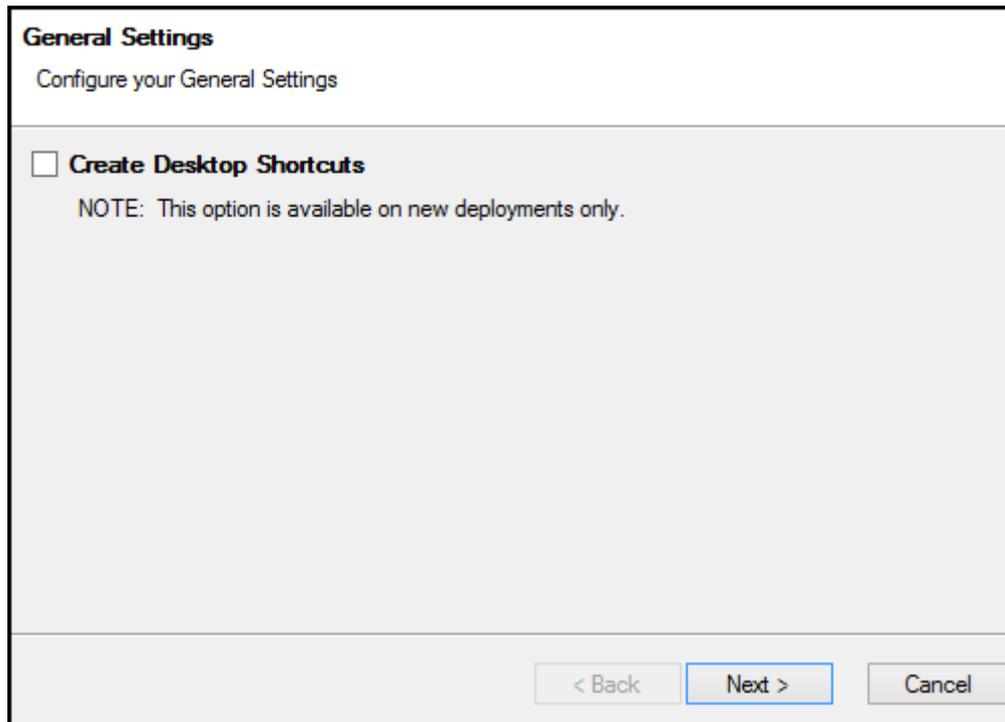


- Click **Next** when the extraction has completed. The **General Settings** dialog is displayed.

---

**Note:** The **General Settings** dialog is not displayed for all modules, depending on the type of application being deployed. For example, desktop shortcuts cannot be created for the Microsoft Office add-ins so the **General Settings** dialog is not displayed.

---



Select **Create Desktop Shortcuts** to create a shortcut to the deployed application on the client machine when the application is first installed on the client machine.

---

**Note:** This option is only available for new deployments.

---

- Click **Next**.

---

**Note:** You do not need to complete the steps under **From a Shared Folder Installation Steps** or **Manually Created Share Steps**. Proceed to the section after the **Manually Created Share Steps** section.

---

## From a Shared Folder Installation Steps

If you selected **From a Shared Folder** at the **How do you want to deploy...?** dialog, the **Configure Folder Share** dialog is displayed:

**Configure Folder Share**

What folder do you want to share \_\_\_\_\_ from?

**Share Name:**  
The share name is the name external users will use to access the folder.

RS1

**External Name:**  
The external name that users will use to access the server.

DOC-012604

< Back   Next >   Cancel

---

**Note:** **Read** access on the shared folder is required for users to be able to install and upgrade the deployed application. Shared folder permissions must be set outside of this installation for deployments installed to a UNC location.

---

1. Enter a **Share Name** in the field provided. This is the name that the **Deployment Folder** will be shared as to users.

---

**Note:** The **Share Name** must be unique. You cannot enter the name of an existing share.

---

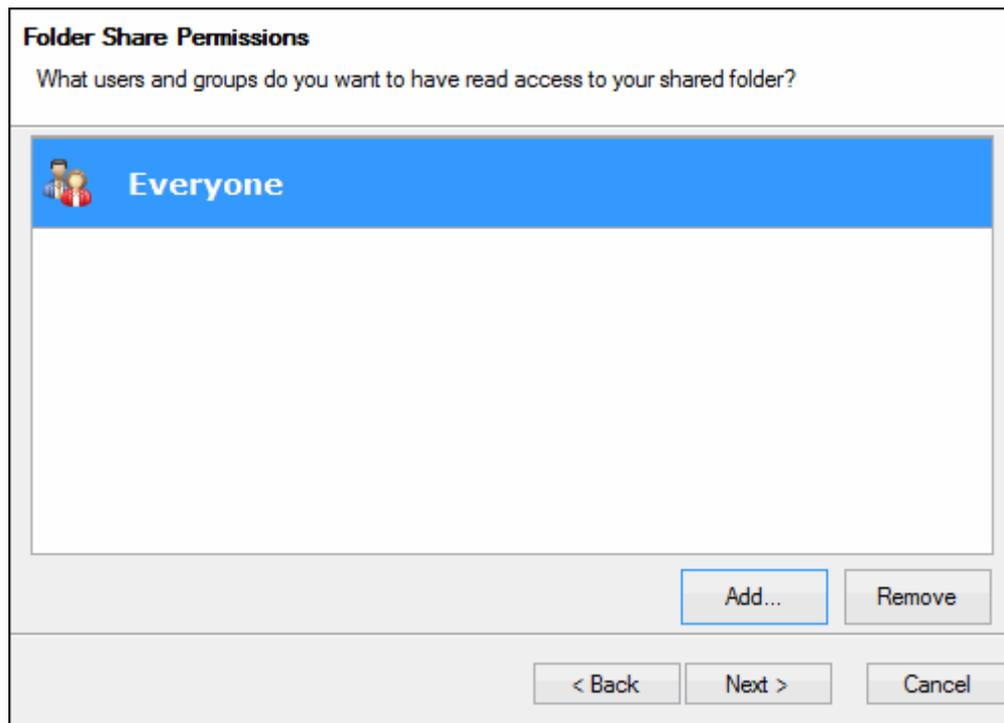
2. Enter the **External Name** of the server hosting the **Deployment Folder** configured, or accept the default value presented. This is the name users will use to access the server. The default value is the machine name of the machine containing the shared folder.

---

**Note:** The **External Name** field is only available if **Advanced Mode** is selected on the **Welcome to the Deployment Creation Wizard** dialog.

---

3. Click **Next**. The **Folder Share Permissions** dialog is displayed if you are installing the deployment to a local drive (e.g., **C:**):



This dialog allows you to add or remove the users and groups that have **read** access to the **Deployment Folder**. By default, the local **Everyone** group is given **read** access.

---

**Note:** **Read** access is required for users to be able to install and upgrade the deployed application.

---

4. Click **Add** to add additional users or groups, or select a user or group to remove and click **Remove** to remove it. If the users and groups presented are acceptable, proceed to the next step.

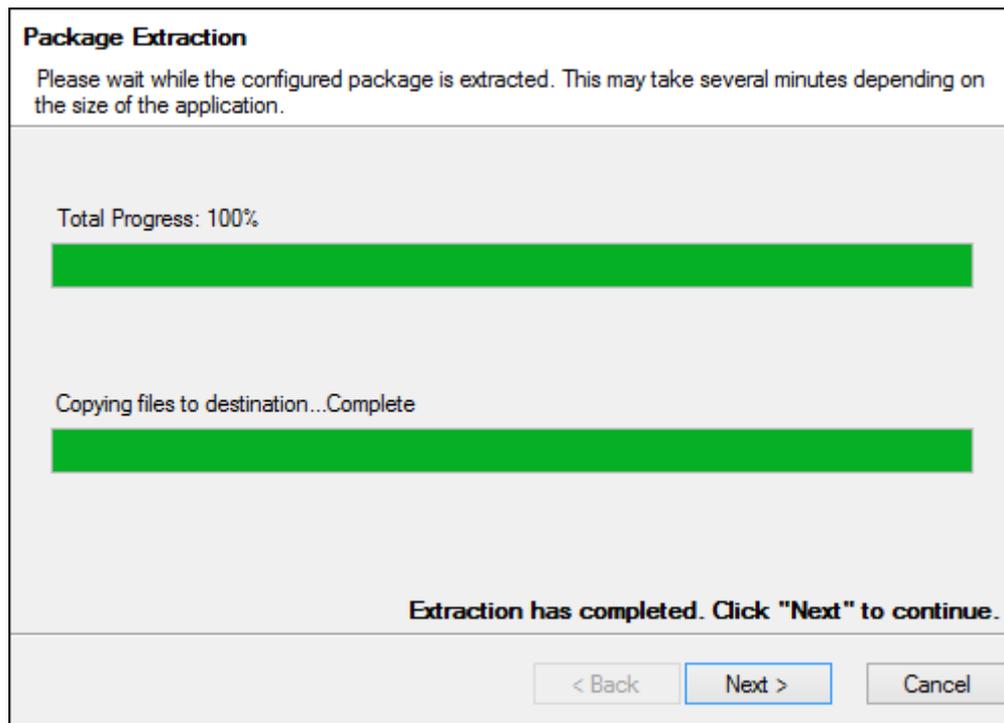
If you click **Add**, the **Select Users and Groups** dialog is displayed:

The dialog box is titled "Select Users and Groups". It contains the following elements:

- Domain or Workspace:** A dropdown menu currently showing "DEV-007832".
- User or Group Name:** A text input field followed by a "Search" button.
- Search Results:** A table with two columns: "Name" and "Description". The table is currently empty.
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

Select the **Domain or Workspace** to find users and groups under from the drop-down select list, then enter a **User Group or Name** to search for in the field provided, and click **Search**. Leave the **User or Group Name** field empty to locate all available accounts. Select the user or group to add from the **Search Results**, then click **OK**. Repeat as necessary to configure your **Folder Share Permissions**.

5. Click **Next**. The **Package Extraction** dialog is displayed, which displays the progress of the installation.

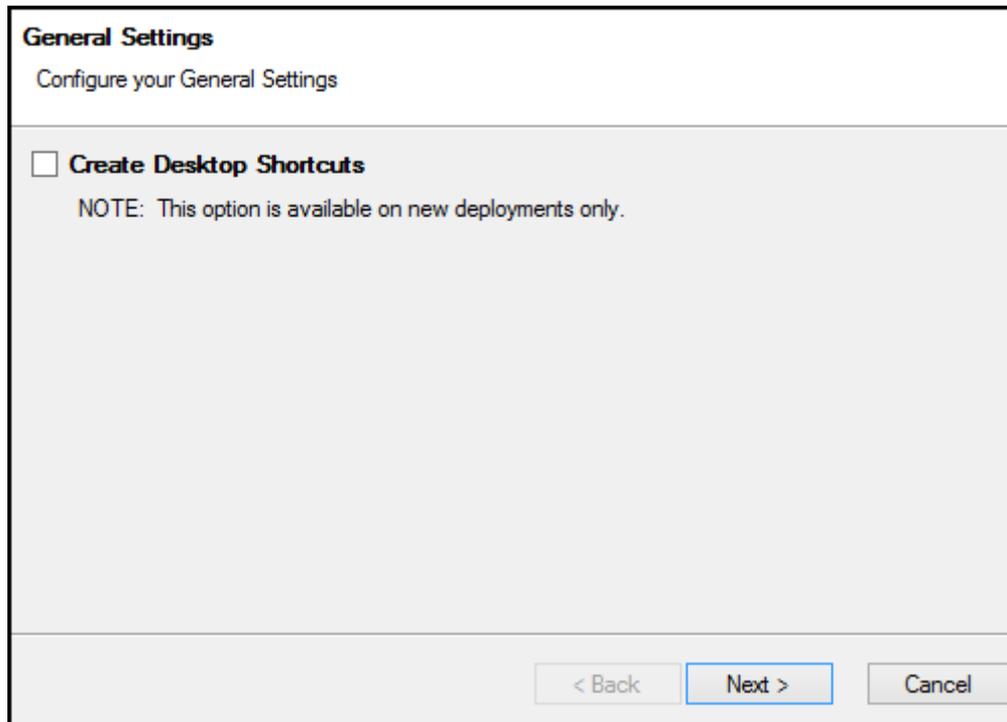


6. Click **Next** when the extraction has completed. The **General Settings** dialog is displayed.

---

**Note:** The **General Settings** dialog is not displayed for all modules, depending on the type of application being deployed. For example, desktop shortcuts cannot be created for the Microsoft Office add-ins so the **General Settings** dialog is not displayed.

---



Select **Create Desktop Shortcuts** to create a shortcut to the deployed application on the client machine when the application is first installed on the client machine.

---

**Note:** This option is only available for new deployments.

---

7. Click **Next**.

---

**Note:** You do not need to complete the steps under **Manually Created Share Steps**. Proceed to the section after the **Manually Created Share Steps** section.

---

## Manually Created Share Steps

If you selected **Skip this step** at the **How do you want to deploy...?** dialog, you must manually create the share that the deployment will be installed to.

If you are installing the deployment package to a Web server, the Web server must be added to the **Local intranet** zone in Microsoft Internet Explorer. Zones are configured in Internet Explorer by selecting the **Security** tab of the **Internet Options** (available from the **Tools** menu). You must also **Enable** the following Security settings:

- **Automatic prompting for file downloads**
- **File download**
- **Font download**

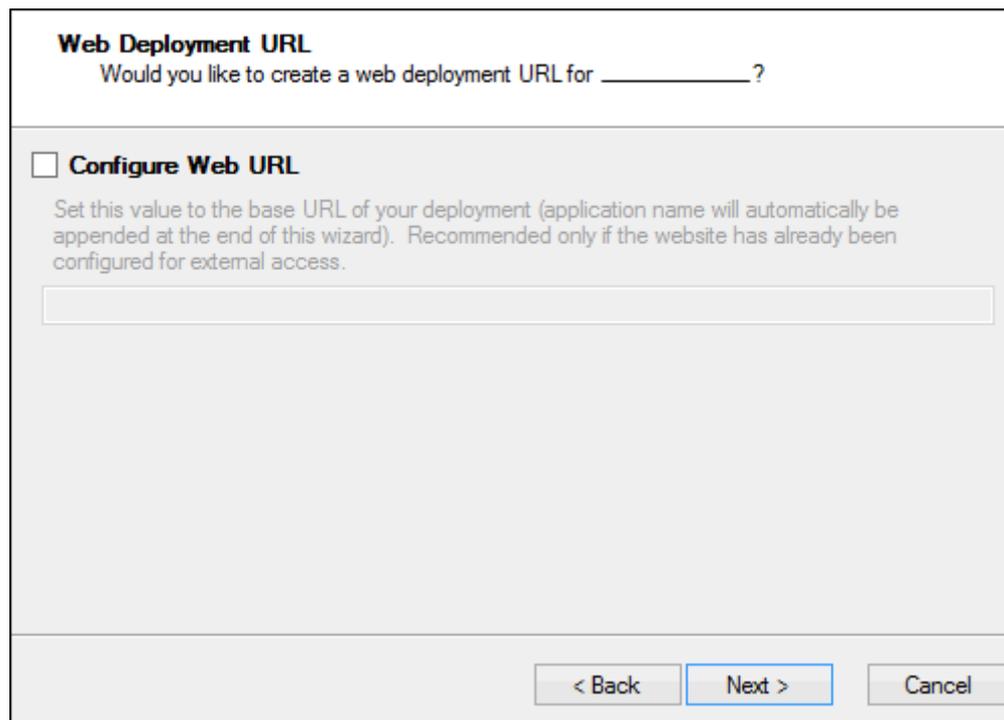
---

**Tip:** For complete details on adding and configuring sites in the Local Intranet Zone, see the Microsoft Internet Explorer help files.

---

If you are installing the deployment package to a network share, **Read** access on the shared folder is required for users to be able to install and upgrade the deployed application. Shared folder permissions must be set outside of this installation.

If you selected **Skip this step** at the **How do you want to deploy...?** dialog, the **Web Deployment URL** dialog is displayed:



The image shows a dialog box titled "Web Deployment URL". The main text asks, "Would you like to create a web deployment URL for \_\_\_\_\_?". Below this is a section with a checkbox labeled "Configure Web URL". The text next to the checkbox explains: "Set this value to the base URL of your deployment (application name will automatically be appended at the end of this wizard). Recommended only if the website has already been configured for external access." There is an empty text input field below the explanation. At the bottom of the dialog are three buttons: "< Back", "Next >", and "Cancel".

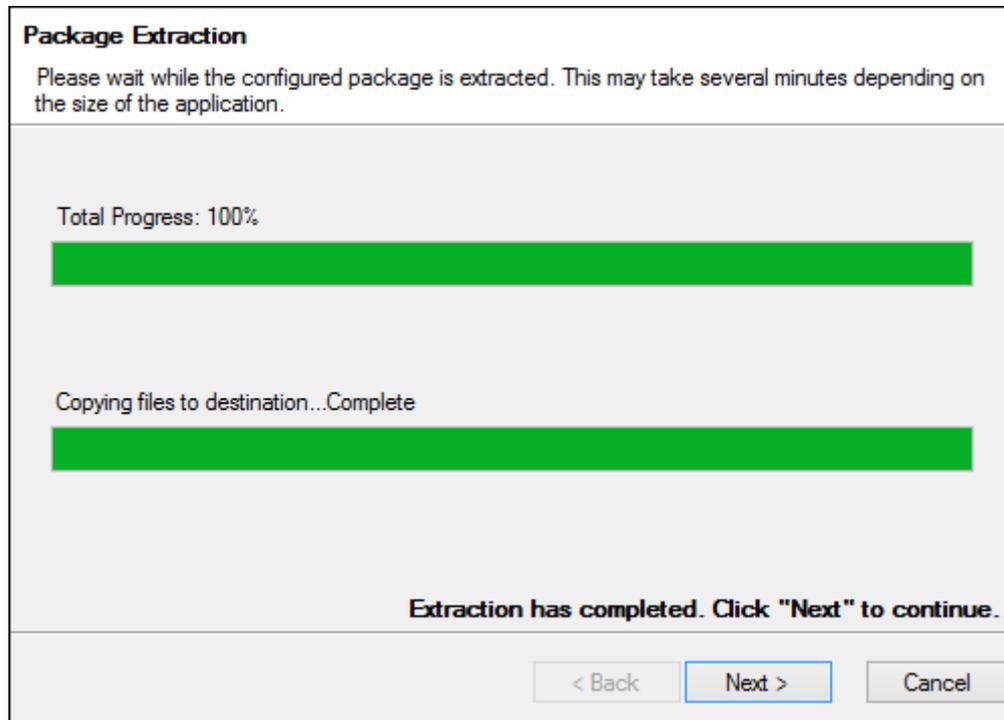
1. Select **Configure Web URL** to have the installer create the link to the deployment that will be sent out to client machines for client installations of the deployed application. This link is available to be copied at the end of the installation, if one is configured.

---

**Tip:** Do not select this option if the deployment Web site has not been configured for external access.

---

2. In the field, enter the base URL of your deployment without the application name (for example, **https://web-server/virtual-directory**). The application name is automatically appended to the URL at the end of the installation.
3. Click **Next**. The **Package Extraction** dialog is displayed, which displays the progress of the installation.

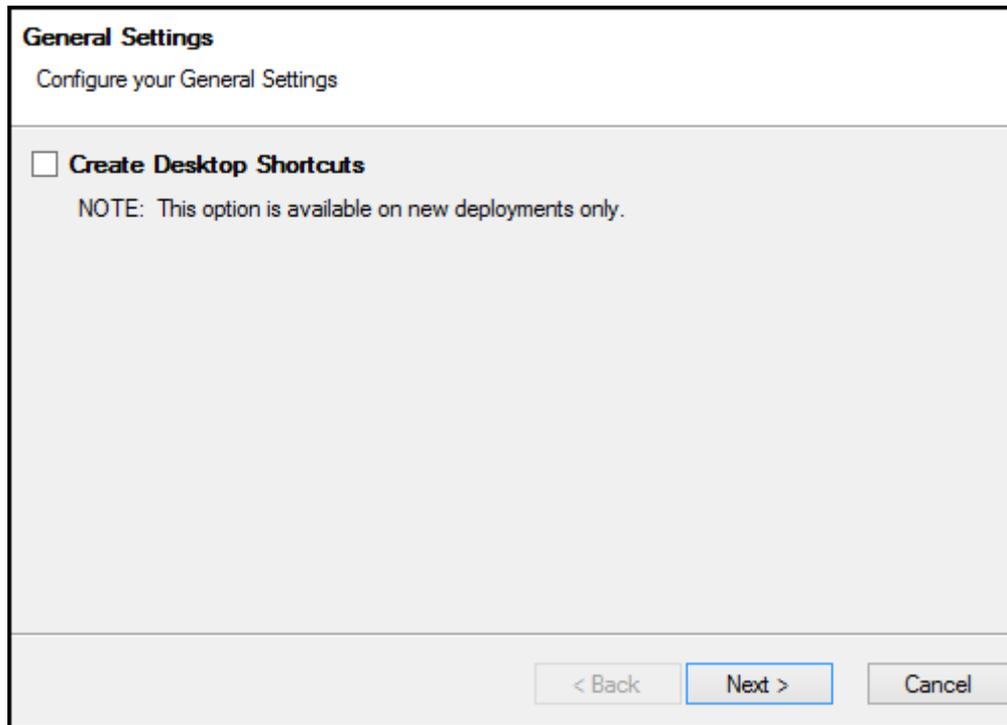


4. Click **Next** when the extraction has completed. The **General Settings** dialog is displayed.

---

**Note:** The **General Settings** dialog is not displayed for all modules, depending on the type of application being deployed. For example, desktop shortcuts cannot be created for the Microsoft Office add-ins so the **General Settings** dialog is not displayed.

---



Select **Create Desktop Shortcuts** to create a shortcut to the deployed application on the client machine when the application is first installed on the client machine.

---

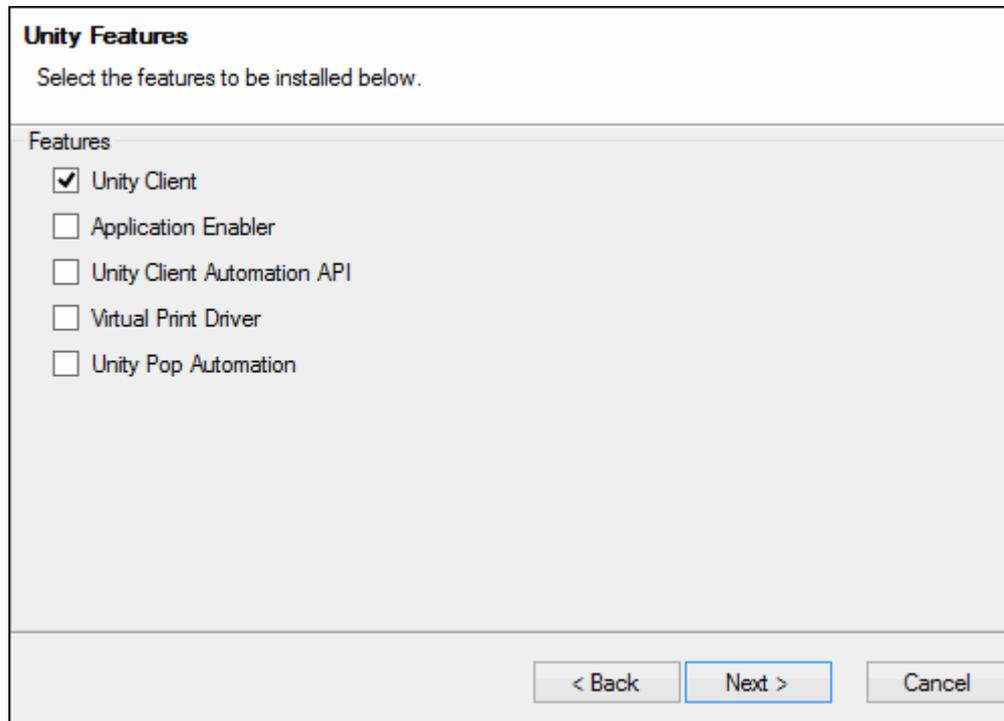
**Note:** This option is only available for new deployments.

---

5. Click **Next**.

## Unity Features

After clicking **Next** on the **General Settings** dialog, the **Unity Features** dialog is displayed.



1. Select from the following features to install:

Component	Description
<b>Unity Client</b>	Installs the Unity Client. The Unity Client is a next-generation document management system that offers the familiar look-and-feel of Microsoft® Office® 2013.
<b>Application Enabler*</b>	Installs the Application Enabler module. Application Enabler provides a way to seamlessly integrate an organization's core line-of-business applications with OnBase.
<b>Unity Client Automation API*</b>	Installs the Unity Client Automation API, which is used by third-party applications to automate the Unity Client.
<b>Virtual Print Driver*</b>	Installs the Virtual Print Driver listener.
<b>Unity Pop Automation*</b>	Installs Unity Pop.

\* Because this component can only run when the Unity Client is in Service Mode, choosing to install this component automatically configures the Unity Client to run in Service Mode.

2. Click **Next**.

## Service Location and Deployment Configuration

After clicking **Next**, the **Service Location** dialog is displayed.

**Service Location**  
Configure your service location(s).

**Service Locations**

New Service Location

Add

Remove

Display Name: New Service Location

Service Path: http://[WebSite]/[Directory]/Service.asmx

Data Source: [DataSource]

Use NT / LDAP Authentication

Use ADFS

< Back   Next >   Cancel

1. Click **Add**.
2. Enter in the **Display Name** field the name of the service location.
3. Enter in the **Service Path** field the full URL to the OnBase application or Web server service (for example, **https://machinename/AppServer/Service.asmx** or **https://machinename/AppNet/Service.asmx**).

---

**Note:** URLs that use the HTTPS binding must be correctly configured on the server for secure connections.

---

4. In the **Data Source** field, enter the data source name for the appropriate data source.
5. Select **Use NT / LDAP Authentication** if your system uses Active Directory or LDAP Authentication.

---

**Note:** In order to use Active Directory or LDAP authentication, the database against which Unity Client runs must also be configured for Active Directory or LDAP authentication. The installer configures Unity Client to match the authentication scheme of the database.

---

6. Select **Use ADFS** if your system uses AD FS (Active Directory Federation Services) authentication.

---

**Note: Use ADFS** is not the same Active Directory authentication scheme as **Use NT/LDAP Authentication**. The **Use ADFS** option is not available for all modules. If this option is not displayed, the module you are installing either does not support AD FS or must be manually configured for AD FS authentication. You cannot enable both **Use ADFS** and **Use NT/LDAP Authentication**. For more information about configuring OnBase to use AD FS, see the **Authentication** module reference guide.

---

Selecting **Use ADFS** causes the remainder of the deployment to be run in Advanced Mode, even if Advanced Mode was not selected initially, because the configuration file for the module must be updated before signing and finalizing the deployment.

---

**Note:** Depending on the module being updated or added, you may be required to complete information in additional dialogs specific to the module. See the main installation steps above for information on any additional dialogs or steps that must be completed before signing the deployment.

---

For information on how to use the **obunity.exe.config** file to configure Unity Client for ADFS, see the **Authentication** module reference guide.

7. Click **Next**. The **Additional Settings** dialog is displayed.

**Additional Settings**  
Configure additional Unity Client settings below.

General

**Default Mail Client:**  
Microsoft Outlook  
This sets the default e-mail client for Unity Client.

**Enable HTTPS Web Requests**  
Port: 15425  
When enabled, allows Unity Client to accept HTTPS web requests through the specified port.

**Enable Persistent Logon**  
When enabled, users will be able to have Unity Client remember their credentials and automatically log on to OnBase. These credentials will be stored until the user manually logs off. This feature is only available with OnBase authentication.

< Back   Next >   Cancel

8. On the **General** tab, in the **Default Mail Client** drop-down select box, select the default mail client that users will use to send external mail from within the Unity Client.

9. Select the **Enable HTTPS Web Requests** if you are installing Application Enabler and you want to expose an HTTPS endpoint to allow third-party applications to perform Application Enabler context events.

Type the port number for the HTTPS endpoint in the **Port** field. The default value is 15425.

---

**Tip:** For more information on HTTPS Automation requirements, see [HTTPS Automation Requirements on page 386](#).

---

**Note:** If HTTPS Automation is selected during installation, the location of the HTTPS certificate must be specified in the **obunity.exe.config** file before signing the deployment.

---

10. Select the **Enable Persistent Logon** check box if users should be able to use persistent logon. When selected, the **Remember me on this computer** check box is displayed in the log on dialog box. When this check box is selected, the Unity Client stores the user's credentials and uses them to automatically log on to OnBase during future sessions. Credentials are stored until the user manually logs off. This feature is only available with OnBase authentication.
11. Select the **Enable Email Link As** check box if the **Send To | Mail Recipient (as Link)** option should be available to users:

**Enable Email Link As**

When enabled, the "Send To | Mail Recipient (as Link)" option is made available in the client. When set to "Upop URI", Unity Pop hyperlink URLs will be sent via "Send To | Mail Recipient (as Link)". When set to "Upop Shortcut File", Unity Pop shortcut files will be attached via "Send To | Mail Recipient (as Link)". When set to "DocPop URL", DocPop hyperlink URLs will be sent via "Send To | Mail Recipient (as Link)".

Upop URI       Upop Shortcut File       DocPop URL

Select **Upop URI** if Unity Pop hyperlink URI files will be sent via **Send To | Mail Recipient (as Link)**. Select **Upop Shortcut File** if Unity Pop shortcut files will be attached via **Send To | Mail Recipient (as Link)**. Select **DocPop URL** if DocPop hyperlink URLs will be sent via **Send To | Mail Recipient (as Link)**.

---

**Note:** The **Create Integration Hyperlink** privilege is required to send Upop URI links.

---

12. Click **Next**. The **Default Configuration File** dialog is displayed.

**Default Configuration File**

Set a default Application Enabler configuration file to be automatically opened by the client.

**None**

**Include Configuration File with Deployment**  
Provide a configuration XML file that will be included and deployed with Application Enabler.  
Configuration Path:  ..

**External Path to Configuration File**  
Provide an external path to a configuration XML file that clients will load automatically. Clients will need to be able to access the provided path.  
External Path:

< Back   Next >   Cancel

13. You can select a default configuration file. If you don't want to specify a file, select **None**.

If you want to specify a configuration file and include it with the deployment, select the **Include Configuration File with Deployment** option. Specify the path to the configuration file in the **Configuration Path** field.

If you want to specify a configuration file but not include it in the deployment, select the **External Path to Configuration File** option. Specify the path to the configuration file in the **External Path** field. The path specified must be accessible to users.

- Click **Next**. The **Application Enabler Options** dialog is displayed.

**Application Enabler Options**

Configure additional Application Enabler settings below. It is optional to configure these settings.

General Pop Configuration

HTTP Automation

**Enable HTTP Automation**

When enabled, an HTTP endpoint will be exposed to allow third party applications to communicate with application enabler in order to perform context events.

Port Number: 15412

< Back Next > Cancel

- On the **General** tab, select **Enable HTTP Automation** to expose an HTTP endpoint to allow third party applications to perform Application Enabler context events. Type the port number for the HTTP endpoint in the **Port** field. The default value is 15412.

16. Click the **Pop Configuration** tab.

The screenshot shows the 'Application Enabler Options' dialog box with the 'Pop Configuration' tab selected. The dialog has a title bar and a subtitle: 'Configure additional Application Enabler settings below. It is optional to configure these settings.' Below the subtitle are three sections, each with a 'URL' field and two checkboxes. The 'DeficiencyPop' section has a URL of 'http://localhost/MedRecs/login.aspx', 'Include external deficiencies' checked, and 'Enable session sharing' unchecked. The 'Patient Window' section has a URL of 'http://localhost/Medical.Pop/login.aspx', 'View patient banner' checked, and 'Enable session sharing' unchecked. The 'FolderPop' section has a URL of 'http://localhost/appnet/FolderPop/FolderPop.aspx'. At the bottom are three buttons: '< Back', 'Next >', and 'Cancel'.

17. The **Pop Configuration** tab allows you to configure URLs for **DeficiencyPop**, **Patient Window**, and **FolderPop**.

Specify the appropriate **URL** in the field for each feature as needed.

- For DeficiencyPop, enter the URL for the Medical Records **Login.aspx** page. If DeficiencyPop should share sessions with Application Enabler and not require a login every time a related context is triggered, select the **Enable session sharing** check box. In order for this to function properly, users must log into Application Enabler using a service location which is pointing to a Medical Records Management server. For checksum validation to occur, **EnablePopChecksum** must be set to **true** in the Medical Records Management server's web.config file. For more information on the **EnablePopChecksum** setting, see the Medical Pop Integrations documentation. If **Include external deficiencies** is selected, the **external** attribute is set to **true**. For more information on these settings, see the Application Enabler module reference guide.
- For Patient Window, enter the URL for Patient Window **Login.aspx** page. If Patient Window should share sessions with Application Enabler and not require a login every time a related context is triggered, select the **Enable session sharing** check box. For checksum validation to occur, **EnableChecksum** must be set to **true** in the Patient Window's web.config file. For more information on the **EnableChecksum** setting, see the Medical Pop Integrations documentation. If **View patient banner** is selected for Patient Window, the **showBanner** attribute is set to **true**. For more information on this setting, see the Application Enabler module reference guide.

- For FolderPop, enter the **URL** to the **FolderPop.aspx** page. Select the **Open FolderPop Results in Separate Windows** option if you want FolderPop links to be opened in separate windows. Select the **Send the session ID to web server** option if you want the AE - FolderPop context to reuse the active session that Application Enabler has instead of consuming a new session. If the option is not selected, users will have to log into each FolderPop instance that is launched after logging into Application Enabler.

---

**Note:** The **Application Enabler - Retrieve Documents** and **Application Enabler - Retrieve Folders** contexts still require users to log in through a standard Application Server and cannot use a Medical Records Management server.

---

18. Click **Next**. The **Deployment Signing** dialog box is displayed.

---

**Note:** Do not sign the deployment until you have made any required changes to the **obunity.exe.config** file. See [Before Signing the Deployment on page 435](#).

---

## Before Signing the Deployment

---

**Caution:** Any necessary changes to the files in the deployment folder or the contents of the deployment folder, such as custom changes to the \*.config file for the module, must be made before clicking **Next** at the **Deployment Signing** dialog box.

---

If you are in Advanced Mode, you still have the option to edit files in the deployment folder at the **File Edit Notification** dialog box that is displayed after the **Deployment Signing** dialog box.

If you are not in advanced mode, you must access the files directly by navigating to the deployment location.

For general information about making changes to the **obunity.exe.config** file, see [The Unity Client Configuration File on page 368](#).

## AD FS Configuration

For information on how to configure the Unity Client for AD FS, see the **Authentication** module reference guide.

## HTTPS Automation

If HTTPS Automation is selected during installation, the location of the HTTPS certificate to be used must be specified in the **obunity.exe.config** file.

To specify the location of the HTTPS certificate:

1. Open the **obunity.exe.config** file.
2. In the `Hyland.Canvas.Automation.Services` node, locate `<HttpsAutomation enabled="false" port="15425" certificateLocation="" />`.

3. Set `enabled` to "true".
4. Change the port setting, if required.
5. Set `certificateLocation` to the file path of the HTTPS certificate.
6. Save and close **obunity.exe.config**.

## Deployment Signing

---

**Caution:** Any necessary changes to the files in the deployment folder or the contents of the deployment folder, such as custom changes to the \*.config file for the module, must be made before clicking **Next** at the **Deployment Signing** dialog box.

---

If you are in Advanced Mode, you still have the option to edit files in the deployment folder at the **File Edit Notification** dialog box that is displayed after the **Deployment Signing** dialog box.

If you are not in advanced mode, you must access the files directly by navigating to the deployment location before signing the deployment.

The **Deployment Signing** dialog box is displayed.

**Deployment Signing**

Signing allows client machines to ensure that the application is deployed from a trusted location. How do you want to sign the deployment?

Sign from Test Certificate

Sign from Certificate User Store

Issuer	Expires	Thumbprint

Sign from File

< Back   Next >   Cancel

1. Select the appropriate signing method.

When **Sign from Test Certificate** is selected, a test certificate with the Common Name **localhost** is used. This test certificate is packaged with all ClickOnce installers. For security purposes, it is strongly recommended that this certificate remain un-trusted. This does not mean the certificate cannot be used, simply that when users attempt to launch the ClickOnce link, they are prompted with a message stating that the publisher could not be verified.

When **Sign from Certificate User Store** is selected, certificates from the current user store are listed under this option. If there are any certificates in the current user store, they can be used for signing here. Only certificates purposed for code signing are valid.

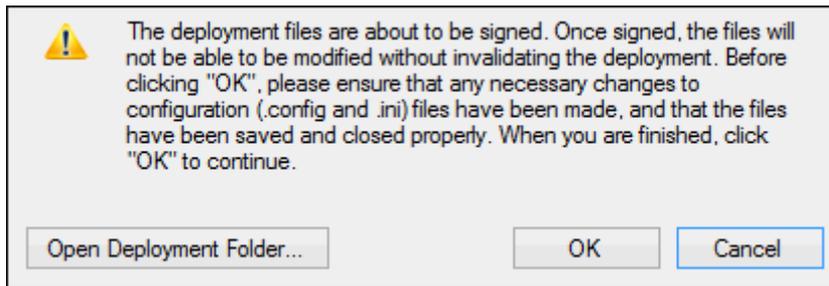
When **Sign from File** is selected, the deployment is signed using the PFX file entered in the corresponding field. Only certificates purposed for code signing are valid.

---

**Caution:** Any necessary changes to the files in the deployment folder or the contents of the deployment folder, such as custom changes to the \*.config file for the module, must be made before clicking **Next** at the **Deployment Signing** dialog box. If you are not in advanced mode, you must access the files directly by navigating to the deployment location before clicking **Next** and signing the deployment.

---

2. Click **Next**. If you are in **Advanced Mode**, the **File Edit Notification** dialog box is displayed.



From this dialog box you can open the deployment folder by clicking **Open Deployment Folder**. At this time, any necessary changes to the files in the folder or the contents of the folder must be made, such as custom changes to the \*.config file for the module.

3. Click **OK**. Upon clicking **OK**, the folder is signed and cannot be modified without updating the deployment instance. The application is deployed and the **Summary** dialog is displayed upon completion.

Clicking the link provided under **Success** launches the application. This is the same as the full path that external users must use to install and launch the application.

Click **Copy Link To Clipboard** to copy this link to the clipboard.

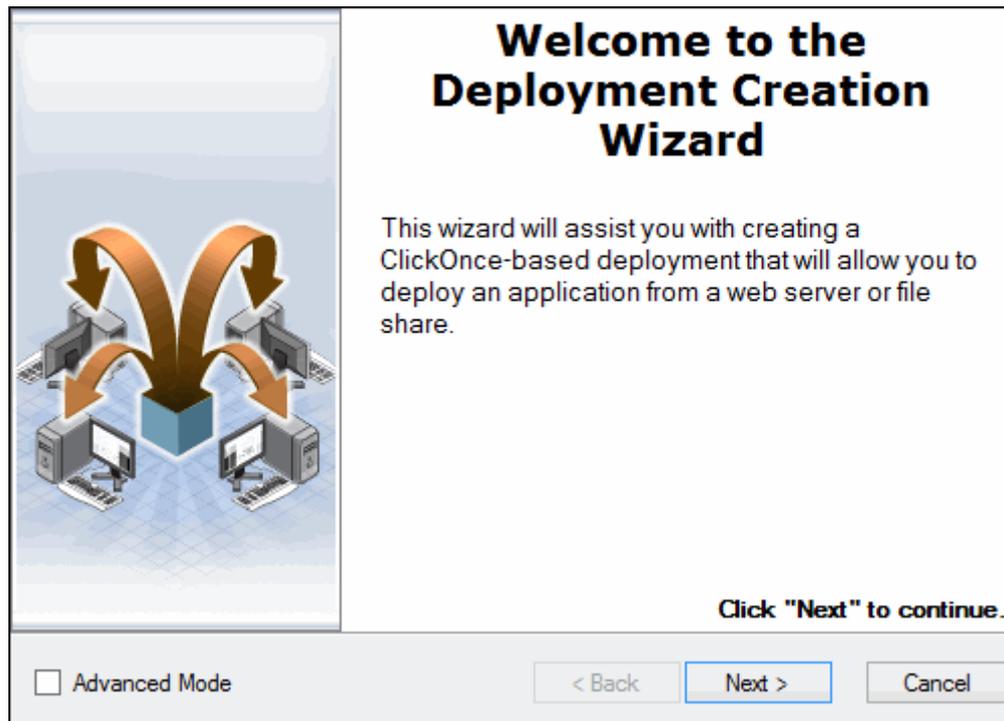
4. Click **Finish**.

Upon completing these steps, you have installed the Deployment Wizard and installed an instance. You can add additional instances and access the Deployment Wizard by selecting **Start | All Programs | Hyland | Deployment | Deployment Wizard**. You can also update existing instances in the same way. See the Updating or Adding a Deployment Instance section for more information.

## Updating or Adding a Deployment Instance

When a change is necessary for a deployment instance, it can be updated or a new instance can be created. To update an existing instance or create a new instance:

1. Select **Start | All Programs | Hyland | Deployment | Deployment Wizard**. The **Welcome to the Deployment Wizard Creation Wizard** dialog is displayed.



Select **Advanced Mode** to enable the ability to update certain aspects of the update where the default values are populated by the installer. Not selecting this option automatically uses the default values populated by the installer.

2. Click **Next**. The **Package Selection** dialog is displayed.
3. Select the deployed module for which you are updating the instance.

4. Click **Next**. The **Instance Settings** dialog is displayed.

**Instance Settings**  
How do you want to uniquely identify your deployment?

**Instance Name**  
If updating an existing deployment, choose the appropriate instance name from the list. If creating a new deployment, enter a new instance name. (Example: Production, Testing)

Deployment Version Number  
The deployment version number is used by clients to determine if they need to be updated, and is not related to the application version.

1 . 0 . 0 . 0

Require clients to upgrade to version 1.0.0.0

< Back    Next >    Cancel

5. Select the name of the application instance from the drop-down select list under the **Instance Name** section. To create a new instance name:
  - a. Click the **Add** button to the right of the drop-down select list. The **Create New Instance** dialog box is displayed.

Please enter the name of the new instance:

OK    Cancel

---

**Note:** If you create a new instance name for an existing deployment, the package must be redeployed to client machines under the new instance name.

---

- b. Enter a name for the new instance in the field provided. The name entered is used to distinguish this deployment from other deployments, so it must be unique.

---

**Note:** The instance name cannot contain any of the following characters: [ ] < > , ; : + = " / \ | ? \* # ' .

---

- c. Click **OK**.

- The **Deployment Version Number** fields can be used to manually set a new version number for this deployment. This number is used by client machines to determine if the application installed needs to be updated.

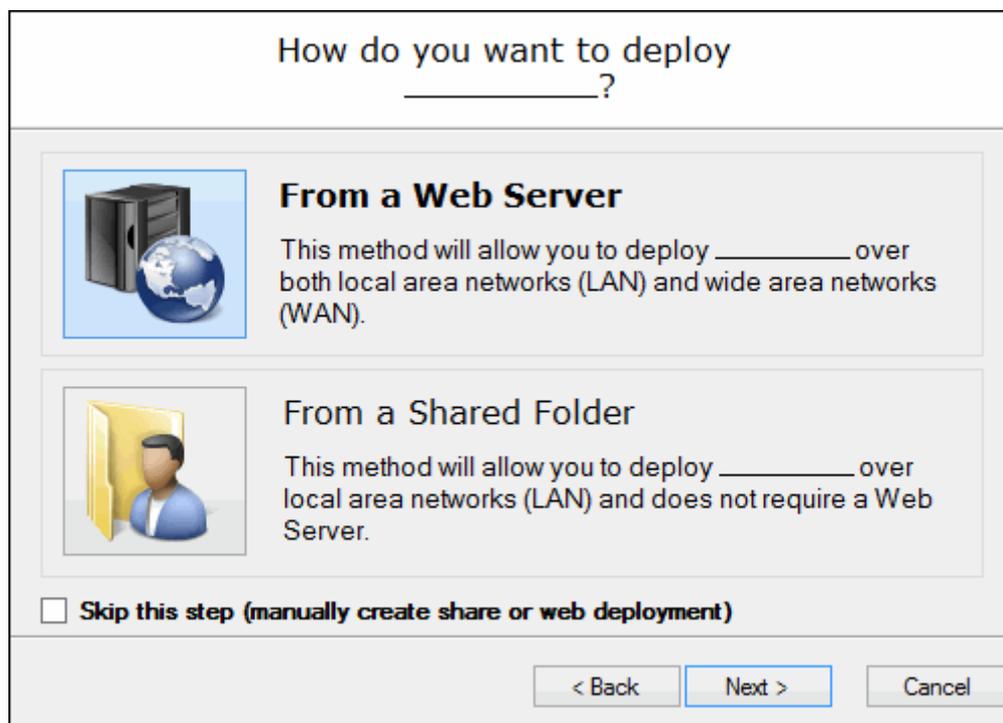
The **Deployment Version Number** is incremented automatically by the deployment wizard. There is no need to change this number.

---

**Note:** The **Deployment Version Number** is not available unless **Advanced Mode** is selected on the **Welcome to the Deployment Creation Wizard** dialog. To enable the **Deployment Version Number**, click **Back** and select **Advanced Mode** on the **Welcome to the Deployment Creation Wizard** dialog.

---

- Select the **Require clients to upgrade to version** check box to force client machines to upgrade to the current instance. This option is selected by default.
- Click **Next**. The **How do you want to deploy Unity Client?** dialog is displayed.



- Click the **Web Server** icon to deploy the application to client workstations via a URL (e.g., <https://web-server/Application/DeployedApp.application>).
- Click the **From a Shared Folder** icon to deploy the application to client workstations via a UNC path (e.g., `\\machine-name\Application\DeployedApp.application`).

---

**Note:** If you are upgrading an existing instance, you can only select to deploy it in the same method as it was deployed originally. For new instances, if IIS is not installed, you cannot select **Web Server** and must deploy the application via a UNC path.

---

10. Click **Next**.

For **Web Server** installations, go to the [Web Server Add or Update Steps](#).

For **From a Shared Folder** installations, go to the [From a Shared Folder Installation Steps](#).

## Web Server Add or Update Steps

If you are adding a deployment package to a Web server, the Web server must be added to the **Local intranet** zone in Microsoft Internet Explorer. Zones are configured in Internet Explorer by selecting the **Security** tab of the **Internet Options** (available from the **Tools** menu). You must also **Enable** the following Security settings:

- **Automatic prompting for file downloads**
- **File download**
- **Font download**

---

**Tip:** For complete details on adding and configuring sites in the Local Intranet Zone, see the Microsoft Internet Explorer help files.

---

If you are adding or updating a **Web Server** deployment, the **Configure Virtual Directory** dialog is displayed:

**Configure Virtual Directory**

What Virtual Directory do you want to deploy \_\_\_\_\_ from?

**Web Site:**  
Default Web Site

**Protocol:**  
https

**Host Name:**  
DOC-012604

**Virtual Directory:**  
ApplicationNameRS2

< Back   Next >   Cancel

1. The default **Deployment Folder** path is displayed. Click **Change** to select a different folder.

---

**Note:** If you are updating an existing deployment, you cannot change the **Deployment Folder**. If you create a new instance with a different Deployment Folder, the old deployment is not updated and the package must be redeployed to client machines under the new Deployment Folder location.

---

The **Deployment Folder** is the folder to which the application files are copied. This folder is configured as a virtual directory, to be mounted by the selected web server.

---

**Caution:** Files in the **Deployment Folder** selected are overwritten.

---

2. Select the **Web Site** to create the virtual directory under from the drop-down select list.

---

**Note:** If you are updating an existing instance, you cannot change the **Web Site**.

---

3. Enter a name for the **Virtual Directory** in the field provided. This is the name of the virtual directory created under the web server selected.

---

**Note:** If a virtual directory with the same name already exists, the existing virtual directory is configured to point to the **Deployment Folder** selected. If you are updating an existing instance, you cannot change the **Virtual Directory**.

---

4. Select a **Protocol** from the drop-down select list. This allows you to configure the installed application to use the **https** protocol if an HTTPS binding is available.

---

**Note:** If you are updating an existing instance, you cannot change the **Protocol**.

---

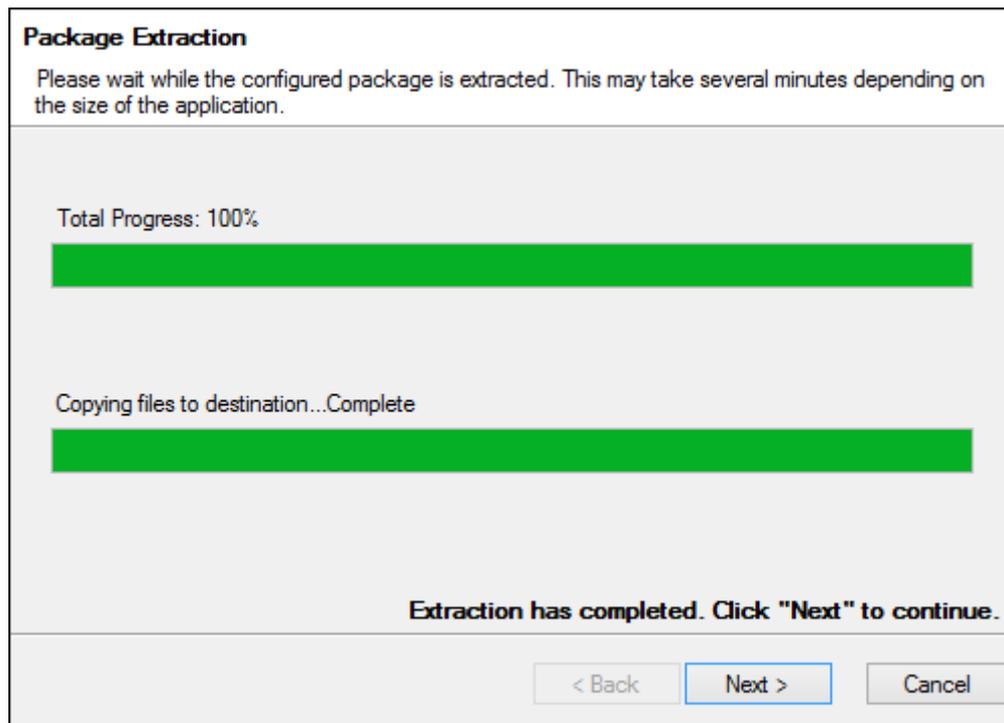
5. Enter the **Host Name** of the **Web Site** selected, or accept the default host name presented. In some cases, such as with HTTPS bindings, the default value may need to be changed to match the host name in the certificate.

---

**Note:** If you are updating an existing instance, you cannot change the **Host Name**.

---

- Click **Next**. The **Package Extraction** dialog is displayed, which displays the progress of the installation.



- Click **Next** when the extraction has completed. The **General Settings** dialog is displayed, but the **Create Desktop Shortcuts** option is only available for new deployments.

---

**Note:** The **General Settings** dialog is not displayed for all modules, depending on the type of application being deployed. For example, desktop shortcuts cannot be created for the Microsoft Office add-ins so the **General Settings** dialog is not displayed.

---

- Click **Next**. Go to the [Service Location and Deployment Configuration](#) steps to complete the installation.

## From a Shared Folder Add or Update Steps

If you are adding or updating a **From a Shared Folder** deployment, the **Configure Folder Share** dialog is displayed:

**Configure Folder Share**

What folder do you want to share \_\_\_\_\_ from?

**Share Name:**  
The share name is the name external users will use to access the folder.

RS1

**External Name:**  
The external name that users will use to access the server.

DOC-012604

< Back   Next >   Cancel

1. The default **Deployment Folder** path is displayed. The **Deployment Folder** is the folder to which the application files are copied. Click **Change** to select a different folder.

---

**Note:** If you are updating an existing deployment, you cannot change the **Deployment Folder**. If you create a new instance with a different Deployment Folder, the old deployment is not updated and the package must be redeployed to client machines under the new Deployment Folder location.

---

---

**Caution:** Files in the **Deployment Folder** selected are overwritten.

---

2. Enter a **Share Name** in the field provided. This is the name that the **Deployment Folder** will be shared as to users.

---

**Note:** The **Share Name** must be unique. You cannot enter the name of an existing share. If you are updating an existing instance, you cannot change the **Share Name**.

---

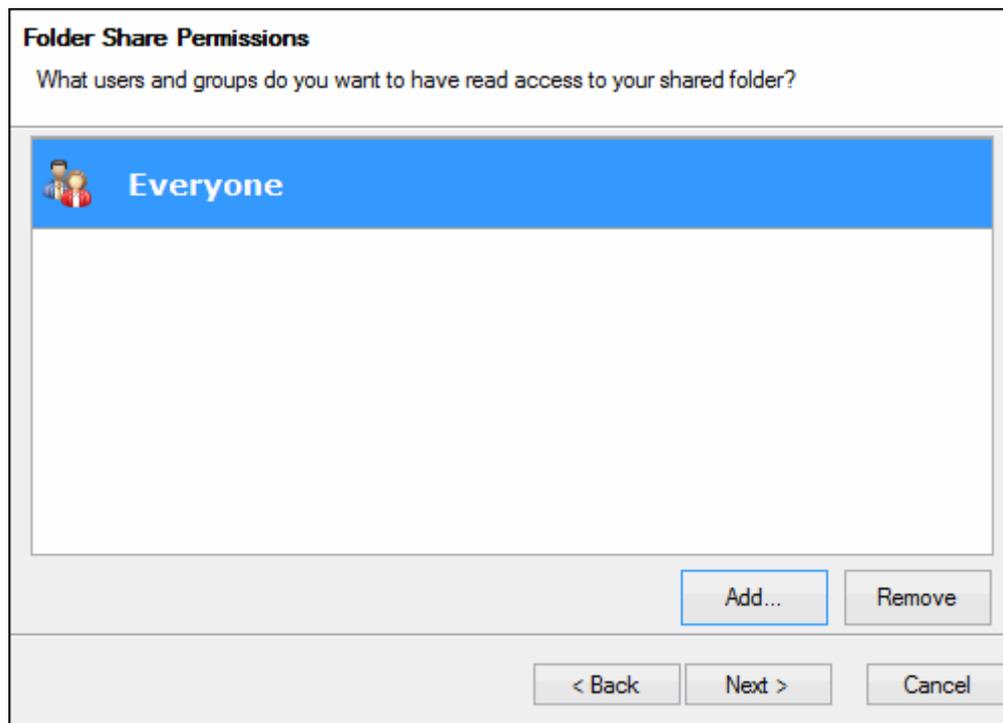
3. Enter the **External Name** of the server hosting the **Deployment Folder** selected, or accept the default value presented. This is the name users will use to access the server. The default value is the machine name of the machine containing the shared folder.

---

**Note:** The **External Name** field is only available if **Advanced Mode** is selected on the **Welcome to the Deployment Creation Wizard** dialog. If you are updating an existing instance, you cannot change the **External Name**.

---

4. Click **Next**. The **Folder Share Permissions** dialog is displayed:



This dialog allows you to add or remove the users and groups that have **read** access to the **Deployment Folder**. By default, the local **Everyone** group is given **read** access.

---

**Note:** **Read** access is required for users to be able to install and upgrade the deployed application.

---

- Click **Add** to add additional users or groups, or select a user or group to remove and click **Remove** to remove it. If the users and groups presented are acceptable, proceed to the next step.

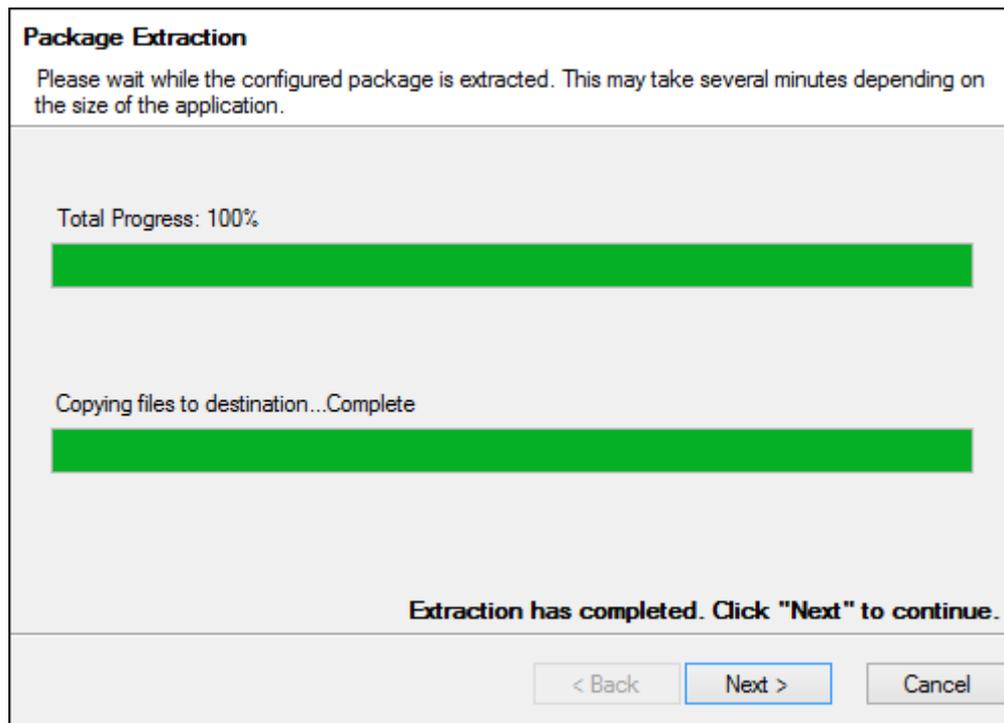
If you click **Add**, the **Select Users and Groups** dialog is displayed:

The dialog box is titled "Select Users and Groups". It contains the following elements:

- Domain or Workspace:** A dropdown menu showing "DEV-007832".
- User or Group Name:** A text input field followed by a "Search" button.
- Search Results:** A table with two columns: "Name" and "Description". The table is currently empty.
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

Select the **Domain or Workspace** to find users and groups under from the drop-down select list, then enter a **User Group or Name** to search for in the field provided, and click **Search**. Leave the **User or Group Name** field empty to locate all available accounts. Select the user or group to add from the **Search Results**, then click **OK**. Repeat as necessary to configure your **Folder Share Permissions**.

- Click **Next** after configuring your **Folder Share Permissions**. The **Package Extraction** dialog is displayed, which displays the progress of the installation.



- Click **Next** when the extraction has completed. The **General Settings** dialog is displayed, but the **Create Desktop Shortcuts** option is only available for new deployments.

---

**Note:** The **General Settings** dialog is not displayed for all modules, depending on the type of application being deployed. For example, desktop shortcuts cannot be created for the Microsoft Office add-ins so the **General Settings** dialog is not displayed.

---

- Click **Next**. Go to the [Service Location and Deployment Configuration](#) steps to complete the installation.

## Service Location and Deployment Configuration

After clicking **Next** on the **Package Extraction** or **General Settings** dialogs, the **Service Location** dialog is displayed.

**Service Location**  
Configure your service location(s).

**Service Locations**

New Service Location	Add
	Remove

Display Name:

Service Path:

Data Source:

Use NT / LDAP Authentication

Use ADFS

< Back    Next >    Cancel

1. Select an existing **Service Location** or click **Add** to create a new service location.
2. Update or enter in the **Display Name** field the name of the service location for the instance.
3. Update or enter in the **Service Path** field the full URL to the OnBase application server service. For example, **https://machinename/AppServer/Service.asmx**.
4. Update or enter in the **Data Source** field the data source name for the appropriate data source.
5. Select **Use NT / LDAP Authentication** if your system uses Active Directory or LDAP Authentication.

---

**Note:** In order to use Active Directory or LDAP authentication, the database against which Unity Client runs must also be configured for Active Directory or LDAP authentication. The installer configures Unity Client to match the authentication scheme of the database.

---

6. Select **Use ADFS** if your system uses AD FS (Active Directory Federation Services) authentication.

Selecting **Use ADFS** causes the remainder of the deployment to be run in Advanced Mode, even if Advanced Mode was not selected initially, because the configuration file for the module must be updated before signing and finalizing the deployment.

---

**Note:** **Use ADFS** is not the same Active Directory authentication scheme as **Use NT/LDAP Authentication**. The **Use ADFS** option is not available for all modules. If this option is not displayed, the module you are installing either does not support AD FS or must be manually configured for AD FS authentication. You cannot enable both **Use ADFS** and **Use NT/LDAP Authentication**. For details on configuring OnBase to use AD FS, see the **Authentication** module reference guide.

---

7. Click **Next** to proceed to the **Deployment Signing** dialog box.

---

**Note:** Depending on the module being updated or added, you may be required to complete information in additional dialogs specific to the module. See the main installation steps above for information on any additional dialogs or steps that must be completed before signing the deployment.

---

8. At the **Deployment Signing** dialog, select the appropriate signing method.

**Deployment Signing**

Signing allows client machines to ensure that the application is deployed from a trusted location. How do you want to sign the deployment?

Sign from Test Certificate

Sign from Certificate User Store

Issuer	Expires	Thumbprint
[Empty]		

Sign from File

[Text Field] [Browse Button (...)]

< Back   Next >   Cancel

When **Sign from Test Certificate** is selected, a test certificate with the Common Name **localhost** is used. This test certificate is packaged with all ClickOnce installers. For security purposes, it is strongly recommended that this certificate remain un-trusted. This does not mean the certificate cannot be used, simply that when users attempt to launch the ClickOnce link, they are prompted with a message stating that the publisher could not be verified.

When **Sign from Certificate User Store** is selected, certificates from the current user store are listed under this option. If there are any certificates in the current user store, they can be used for signing here. Only certificates purposed for code signing are valid.

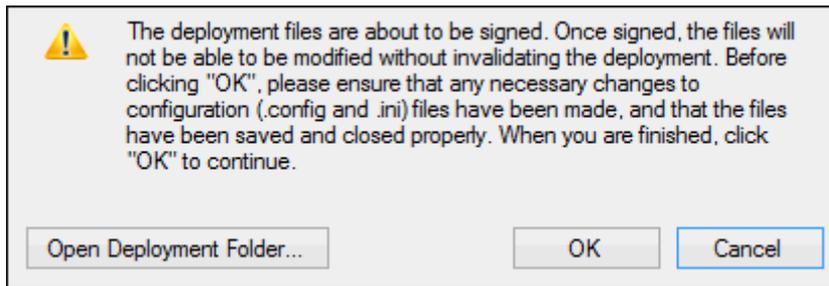
When **Sign from File** is selected, the deployment is signed using the PFX file entered in the corresponding field. Only certificates purposed for code signing are valid.

---

**Caution:** Any necessary changes to the files in the deployment folder or the contents of the deployment folder, such as custom changes to the \*.config file for the module, must be made before clicking **Next** at the **Deployment Signing** dialog box. If you are not in advanced mode, you must access the files directly by navigating to the deployment location before clicking **Next** and signing the deployment.

---

- Click **Next**. If you are in Advanced Mode, the **File Edit Notification** dialog box is displayed.



From this dialog box you can open the deployment folder by clicking **Open Deployment Folder**. At this time, any necessary changes to the files in the folder or the contents of the folder should be made. Upon clicking **OK**, the folder is signed and cannot be modified without updating the deployment instance. Clicking **Cancel** returns you to the signing screen.

- Click **OK**. The application is deployed and the **Summary** dialog is displayed upon completion.

Clicking the link provided under **Success** launches the application. This is the same as the full path that external users must use to install and launch the application.

Click **Copy Link To Clipboard** to copy this link to the clipboard.

- Click **Finish**.

## Automatically Launching a Deployed Application at System Startup

In order to launch a deployed application automatically at startup, Service Mode must be enabled. Unity Client is configured to start in Service Mode by default.

If the application has been redeployed, the application upgrade will automatically be downloaded at startup.

## Removing a Deployed Application

Deployed applications are installed to both client workstations and the deployment server. This section describes how to remove a deployed application instance from both the client workstations and deployment server, or completely removing the deployed application and all installed instances.

## Removing a Deployed Application Instance from Client Workstations

To remove a deployed application instance from a client workstation:

1. Access the Windows Control Panel by selecting **Start | Control Panel** on the Windows desktop.
2. Double click **Add or Remove Programs**. The **Add or Remove Programs** dialog is displayed.
3. Locate the installed application in the list of programs (e.g., **Hyland Unity Client [Instance Name]**).
4. Select the program and click **Change/Remove**. The deployed application **Maintenance** dialog is displayed.
5. Select **Remove the application from this computer**.
6. Click **OK**.

The installed application is removed from the workstation.

---

**Note:** Removing the application instance from client workstations does not remove the application instance from the deployment server. Users can re-install a removed application instance by following the original link to the instance. To completely remove a deployed application instance, see [Removing a Deployed Application Instance from the Deployment Server](#) or [Completely Removing a Deployed Application](#) below.

---

## Removing a Deployed Application Instance from the Deployment Server

If a deployed application instance is removed from all client workstations, it can be re-installed by users who follow the link to the deployed application instance, unless the instance is also removed from the deployment server.

To remove an instance of a deployed application in order to reset the version and/or re-use an instance name:

1. Access the Windows Registry (enter **regedit** in the Windows **Start | Run** dialog). The **Registry Editor** dialog is displayed.

---

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

---

2. Expand the following registry key:  
**HKEY\_LOCAL\_MACHINE\SOFTWARE\Hyland\Deployment**  
Under 64-bit systems this key may be located at:  
**HKEY\_LOCAL\_MACHINE\SOFTWARE\Wow6432Node\Hyland\Deployment**

3. Expand the subkey that corresponds to the deployed application you want to remove the instance from (for example, **ApplicationEnabler** or **ReportServices**).
4. Right click the subkey that corresponds to the instance name you want to remove.
5. Select **Delete**.
6. Click **Yes** at the confirmation prompt. The deleted instance is no longer available in the Deployment Wizard.
7. Locate the files for the instance to remove on the deployment server.  
The location of the files depends on the location selected during installation. In a default, 32-bit installation, the files are located at **C:\Program Files\Hyland\[ApplicationName]\[InstanceName]** (for example, **C:\Program Files\Hyland\ApplicationEnabler\MyAppEnablerInstance**).
8. Delete all of the files and folders contained in the instance folder, or delete the entire instance folder. The application is no longer available for installation.

---

**Caution:** Take care to delete only the folder for the instance you are removing. Deleting the application folder will remove all instances of the deployed application.

---

---

**Note:** If the instance files are not removed from the deployment server, the application instance can still be installed by users who follow the link to the deployed application.

---

9. Follow the steps above to remove the installed instance from all client workstations (see, [Removing a Deployed Application Instance from Client Workstations](#)).

---

**Note:** Until the instance is removed from client workstations, the application instance can still be used by client workstations, even if it is removed from the deployment server.

---

## Completely Removing a Deployed Application

To completely remove a deployed application:

1. Follow the steps above to remove all instances of the deployed application from the deployment server (see, [Removing a Deployed Application Instance from the Deployment Server](#)).
2. Access the Windows Control Panel by selecting **Start | Control Panel** on the Windows desktop.
3. Double click **Add or Remove Programs**. The **Add or Remove Programs** dialog is displayed.
4. Locate the installed application in the list of programs (e.g., **Hyland Unity Client** or **Hyland Unity Client Deployment**).
5. Select the application and click **Change/Remove**. The application and deployment package is removed.

---

**Note:** Removing the last deployed application from the deployment server also removes the **Deployment Wizard** from the deployment server.

---

6. Follow the steps above to remove all instances of the deployed application from all client workstations (see, [Removing a Deployed Application Instance from Client Workstations](#)).

---

**Note:** Until all instances of the application are removed from client workstations, the application can still be used by client workstations, even if it is removed from the deployment server.

---

## Manual Installation

To install the OnBase Unity Client manually:

1. Copy the `..\apps\Unity Client` folder from your OnBase Core Services build.
2. Paste this folder to a location on the workstation where you are installing the Unity Client.
3. Navigate to the location where you pasted the **Unity Client** folder.
4. Open **obunity.exe.config**.
5. Configure the following settings in the **<ServiceLocations>** section:

---

**Note:** Within the Unity Client, Unicode characters are only supported in data source names and **FriendlyName** contexts if the Unity Client configuration file is saved with Unicode encoding.

---

Setting Name	Description
<b>ServicePath</b>	The URL to the <b>Service.asmx</b> page of the Application Server. For example, <b>http://[Application Server]/appserver/service.asmx</b> .
<b>DataSource</b>	The data source name (configured at the Application Server) to connect to. For example, OnBase.
<b>FriendlyName</b>	The "friendly name" of the service location. This name is displayed in the Unity Client's title bar. For example, OnBase.
<b>UseNTAuthentication</b>	When set to <b>true</b> , the Unity Client is configured to use Active Directory or LDAP Authentication.
<b>DefaultDomain</b>	The name of the domain to use by default. For example, <b>mydomain.com</b> .

Setting Name	Description
<b>UseADFS</b>	<p>When set to <b>true</b>, the Unity Client is configured to use ADFS Authentication.</p> <p>Additional steps must be taken to configure ADFS Authentication in the Unity Client. For more information, see the <b>Authentication</b> module reference guide.</p> <hr/> <p><b>Note:</b> If <b>UseADFS</b> is set to <b>true</b>, <b>UseNTAuthentication</b> must be set to <b>false</b>.</p> <hr/>

6. Configure additional settings if necessary. See [The Unity Client Configuration File on page 368](#) for more information.
7. Save and close **obunity.exe.config**.

## Running Multiple Instances of the Unity Client

You can run multiple instances of the Unity Client when, for example, you want to test out a different Unity Client configuration. You can run multiple instances of the Unity Client only when they are installed to different locations on the workstation. You cannot run multiple instances of the same Unity Client installation.

---

**Note:** When running multiple instances of the Unity Client, only a single instance can run in Service Mode, across all Unity Client deployments.

---

## Backup/Recovery

### Window Settings

Unity Client window position settings are saved for each user in the **window.settings** file.

The default location of the **window.settings** file for Windows 7, Windows 8.1, and Windows 10 is **C:\Users\[user]\AppData\Local\Hyland Software, Inc\Hyland.Canvas>window.settings**.

## Frequently Asked Questions

1. **Which OnBase setting determines the time allotment for a user working within the Unity Client?**

The **Enable Timeout** setting, in the OnBase Configuration module, determines the time allotment for users working within the Unity Client and many modules that access OnBase through the Unity Client, such as Application Enabler.

# Troubleshooting

---

**Note:** A poor network connection may result in general errors and performance issues in the Unity Client. When troubleshooting, begin by ensuring that your network connection is stable and of the highest quality.

---

## Cannot Start Application

When attempting to install a module to a client machine using a ClickOnce deployment, the **Cannot Start Application** dialog may be displayed with the message: **Application validation did not succeed. Unable to continue.**

This error occurs when a deployment file for the application is modified after the deployment was created. To resolve this error, you must create a new deployment of the application using the Deployment Wizard. See the **Updating or Adding a Deployment Instance** section of this module reference guide for details.

---

**Note:** When updating an existing deployment, make sure you select the appropriate module, as well as the **Instance Name** that corresponds to the instance that generated the error.

---

## Display

When working in a dual monitor environment and the right monitor is the primary monitor, the Unity Client displays the title bar partially off screen.

**Resolution:** Use the left monitor as the primary monitor. After opening the Unity Client, drag it to your left monitor. The next time you launch the Unity Client, it will be displayed in the left monitor.

## External Email

### The Body of Notifications is Blank

If the **Use Native Mail Dialog** option is not selected, meaning the OnBase **Mail Message** dialog box is used, and HTML is the default format for messages, the body of notifications may not be populated correctly. It is a best practice to set the default format to Plain Text or Rich Text to ensure that notification messages from OnBase are populated correctly.

## Exception Has Been Thrown by the Target of an Invocation

When attempting to send an external email in the Unity Client using Microsoft Outlook, the following message is displayed: **Exception has been thrown by the target of an invocation.** Clicking **Show Details** displays the following: **System.Reflection.TargetInvocationException: Exception has been thrown by the target of an invocation. --->**

**Hyland.Canvas.Controls.MissingPrerequisiteException: Microsoft Office and the Microsoft Office Primary Interop Assemblies must be installed to use this feature. Please install the required prerequisites and try again.**

**Resolution:** The .NET Programmability Support feature was not installed with Microsoft Outlook. Use the Windows Control Panel to modify your Outlook installation to include .NET Programmability Support.

## One or More of the Selected Documents Could Not Be Sent

When attempting to send an external email in the Unity Client using Microsoft Outlook, the following message is displayed: **One or more of the selected documents could not be sent.** Clicking **Show Details** displays the following: **The attachment size exceeds the allowable limit [OnBase document's Auto-Name string].**

**Resolution:** This issue occurs because the size of the OnBase documents attached to the external email message exceed the mail system's attachment size limitation. When sending multiple documents, those documents with a cumulative size less than the mail system's attachment size limitation will be attached to the email message. Documents whose size will cause the email message to exceed the mail system's attachment size limitation will not be attached.

## Unity Pop File Is Not Valid for the System

When attempting to open a Unity Pop file attached to an email message, a message is displayed stating that the Unity Pop file is not valid for the system.

**Resolution:** This issue occurs because the Unity Pop file is being launched against a different database than it was sourced from. For example, a Unity Pop file was created in database 1. A user logged on to database 2 will not be able to open this file. Because Unity Pop files do not include database information, if users will be accessing multiple OnBase databases with one Unity Client, consider using DocPop instead of Unity Pop.

## You Do Not Have Privileges to View This Document

When attempting to open a Unity Pop file, the following message is displayed: **You do not have privileges to view this document.** An **object reference not set to an instance of an object** message is logged in the Diagnostics Console.

**Resolution:** The document no longer exists in OnBase.

## Open or Save an EML Document

No prompt to open or save an EML document is presented.

**Resolution:** Ensure a mail client is correctly installed. Without the mail client, the EML file type is not recognized.

## Page Could Not Be Displayed

When you attempt to send documents as external email attachments, a **This page cannot be displayed** error is returned rather than the email draft being opened. This behavior is often sporadic, and affects systems using Internet Explorer as the default web browser.

**Resolution:** Add the secure URI being passed to the web browser to Internet Explorer's list of Trusted Sites.

## Logging On

Microsoft SQL Server Compact Edition (CE)

When using a machine that previously had Microsoft SQL Server Compact Edition (CE) installed, you are unable to log on to the Unity Client.

**Resolution:** Remove the legacy registry entries for Microsoft SQL Server CE.

---

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

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These registry entries are located at HKEY\_LOCAL\_MACHINE\SOFTWARE\Microsoft\Microsoft SQL Server Compact Edition\v3.5 (32-bit operating systems) or HKEY\_LOCAL\_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Microsoft SQL Server Compact Edition\v3.5 (64-bit operating systems).

## Initialization Error

An **Initialization Error** WMI (Windows Management Instrumentation) corruption error message is displayed when attempting to log on to the Unity Client.

**Resolution:** Navigate to the `..system32\wbem\` folder on the workstation and delete the **Repository** directory. Restart the Windows Management Instrumentation Windows Service as, and well as any dependent Windows Services.

## Scanning

When issues arise during scanning in the Unity Client, the **LowTwainMode** setting can be used in troubleshooting.

When enabled, this setting allows the following scanner settings to be saved at the local workstation level: Duplex, auto feed, color format, brightness, contrast, paper size, orientation, rotation, threshold, xres, and yres. Other settings are retained only for the duration of the scan session.

When **LowTwainMode** is disabled, the Unity Client attempts to configure all scanner settings at once.

To enable **LowTwainMode**, add the following to the **appSettings** section of the Unity Client configuration file:

```
<add key="lowTwainMode" value="true" />
```

To disable this setting, change the **lowTwainMode** key's value to **false**.

---

**Note:** Once **LowTwainMode** is enabled, it will only take effect on newly created scan formats. Existing scan formats must be recreated to exhibit the **LowTwainMode** behavior.

---

## Working with Documents

### Created in a Newer Version of Word

When a Microsoft Word 2007 document (.docx) is opened in the Unity Client on a machine with Microsoft Office 2003 and an older version of the Office Compatibility Pack, the following conversion warning message is displayed: **Because this file was created in a newer version of Word, it has been converted to a format that you can work with.** This conversion warning message may be displayed behind the Unity Client window, making it difficult to detect.

**Resolution:** Update the Office Compatibility Pack to a version that provides the ability to suppress this message. For more information, see <http://support.microsoft.com/kb/936695>.

### There Was an Error Opening This File

When uploading or opening a document, the following message is displayed: **There was an error opening this file.**

**Resolution:** Ensure that the document is in the Document Type's default file format.

### Excel Ribbon Is Reset to the Home Tab

When multiple Microsoft Excel documents are open in the Unity Client, the Excel ribbon is reset to the **Home** tab each time you switch between documents.

**Resolution:** This is a known issue when working with multiple Microsoft Excel documents simultaneously in the Unity Client.

## Opening a Modal Dialog Box

When multiple Microsoft Word or Excel documents are open in the Unity Client, opening a modal dialog box (e.g., Word's **Font** dialog box) in one document does not allow you to perform work on the other document. Closing the modal dialog box allows you to perform work on the other document.

**Resolution:** This is a known issue when working with multiple Microsoft Word or Excel documents simultaneously in the Unity Client.

## Unable to Use Microsoft Excel Outside of the Unity Client

Viewing a Microsoft Excel document in the Unity Client takes focus away from the Microsoft Excel application. When an Excel document is open in the Unity Client, you are unable to use Microsoft Excel outside of the Unity Client.

**Resolution:** This is a known issue when working with Excel documents in the Unity Client. When an Excel document is open in the Unity Client, you are unable to use Microsoft Excel outside of the Unity Client until the Excel document in the Unity Client is closed.

## Attempt to Access Invalid Address

When a cell in the Microsoft Excel application is being edited, opening a Microsoft Excel document in the Unity Client displays the following message: **Attempt to access invalid address.**

**Resolution:** Click **Ignore** and close the Microsoft Excel document in the Unity Client. In the Microsoft Excel application, navigate to a different cell. In the Unity Client, reopen the Microsoft Excel document.

## Exception Has Been Thrown by the Target of an Invocation

When attempting to view a document in the Unity Client, the following error is displayed: **Exception has been thrown by the target of an invocation.**

**Resolution:** Ensure the Unity Client is the same version and build as the Application Server. The Unity Client version and build is displayed in the login screen's **Build Version** field. You can also view the version and build by right-clicking the Unity Client executable file and selecting **Properties**. The version and build is displayed in the **Product version** field on the **Details** tab.

If this error is encountered when attempting to view a Microsoft Office document in the Unity Client, ensure that either Microsoft Office is installed on the workstation, or the WOPI Server is installed and configured to integrate with a valid Microsoft Office Online Server.

## Characters Appear Cut Off in Text Documents

Text documents viewed in the Unity Client may display a different number of characters per line than those viewed in the OnBase Client.

**Resolution:** This inconsistency occurs because text documents are rendered as images in the Unity Client. In the OnBase Client, text documents are rendered as text. In the Unity Client, the number of characters displayed per line is controlled by the **Characters per line** setting for the Document Type. For example, if the **Characters per line** setting is 132, only characters 1-132 are displayed for text documents in the Unity Client. The **Characters per line** setting is accessed by clicking **View/Print** from the **Document Types** dialog box in the Configuration module.

## Unity Client Becomes Unresponsive When Scrolling

When Microsoft Excel documents are open in the Unity Client, hovering over a document that is not in focus and attempting to scroll causes the Unity Client to become unresponsive.

**Resolution:** In Windows 10, the ability to scroll inactive windows when hovering over them was introduced, and this feature is not compatible with Microsoft Excel. To avoid encountering this issue, disable the **Scroll inactive windows when I hover over them** Windows setting.

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

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

The position shift may occur in the following instances:

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

---

**Caution:** If a redaction, burned markup, or deficiency appears in a shifted position, do not save or sign the document until the shift has been corrected. Saving or signing the document will permanently place the redaction, burned markup, or deficiency in the shifted position. The position shift of notes that do not permanently alter the document can be corrected at any time.

---

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

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

A position shift can be corrected through the following methods:

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

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

## Contacting Support

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

- The OnBase module where the issue was encountered.
- The OnBase version and build (Example: 18.0.0.10).
- The type and version of the connected database, such as Microsoft SQL Server 2014 or Oracle 12c, and any Service Packs that have been installed.
- The operating system that the workstation is running on, such as Windows 10 or Windows Server 2012 R2, and any Service Packs that have been installed. Check the supported operating systems for this module to ensure that the operating system is supported.
- The name and version of any application related to the issue.
- The version of Internet Explorer, and any Service Packs that have been installed, if applicable.
- A complete description of the problem, including actions leading up to the issue.
- Screenshots of any error messages.

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



The System Assessment Tool helps to ensure that workstations meet the minimum system requirements for the OnBase Client, Unity Client, and Web and Application Servers. It is an optional tool that can be used when deploying or upgrading workstations to the current version of OnBase.

## Using the System Assessment Tool

To run the System Assessment Tool:

1. Navigate to the **SAT** folder of your OnBase Client or OnBase Core Services build.
2. Double-click **System Assessment Tool.exe**.
3. The System Assessment Results page is opened in a web browser.
4. Results are returned in two sections:
  - **Client Report** - This section checks the workstation's components against the OnBase Client and Unity Client minimum requirements. It contains the following results:

Component	Description
<b>Operating System</b>	The operating system installed on the workstation.
<b>CPU</b>	The speed of the workstation's CPU.
<b>RAM</b>	The amount of RAM on the workstation.
<b>Free Hard Disk Space</b>	The amount of free hard disk space on the workstation.
<b>Video Memory</b>	The amount of video memory on the workstation.
<b>.NET Framework</b>	Whether or not the required Microsoft .NET Framework is installed on the workstation.
<b>Internet Browser</b>	The Internet browser installed on the workstation.
<b>Visual C++ Redistributable</b>	Whether or not the required Microsoft Visual C++ Redistributable Package is installed on the workstation.

- **Server Report** - This section checks the workstation's components against the OnBase Web/Application Server minimum requirements. It contains the following results:

Component	Description
<b>Operating System</b>	The operating system installed on the workstation.
<b>CPU</b>	The speed of the workstation's CPU.
<b>RAM</b>	The amount of RAM on the workstation.
<b>Free Hard Disk Space</b>	The amount of free hard disk space on the workstation.
<b>.NET Framework</b>	Whether or not the required Microsoft .NET Framework is installed on the workstation.
<b>Internet Browser</b>	The Internet browser installed on the workstation.
<b>Visual C++ Redistributable</b>	Whether or not the required Microsoft Visual C++ Redistributable Package is installed on the workstation.

5. One of the following statuses is displayed next to each component:

Status	Description
<b>PASS</b>	This component meets or exceeds the minimum requirement.
<b>FAIL</b>	This component does not meet the minimum requirement.

---

**Note:** The description for each **PASS** component indicates whether the component meets the minimum requirement or the recommended requirement.

---

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.

## DocPop and Unity Pop

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**Note:** This section applies to working with OnBase through the Unity Client and Web Client.

---

DocPop and Upop serve similar purposes, but they are not interchangeable. There are situations where one Pop integration should be used over the other.

Upop assumes that users have the Unity Client installed, are operating the Unity Client in Service Mode, and have user accounts in OnBase. Upop may be recommended for a Unity Client installation or where Upop provides additional benefits over DocPop.

- Use DocPop if the Unity Client will not be installed on users' workstations. DocPop requires no OnBase software on the user's workstation, whereas Upop requires the Unity Client.
- Use DocPop if Macintosh users require access to OnBase. Upop cannot run on a Macintosh operating system. In environments where only some users have the Unity Client installed, use DocPop to ensure all users can view documents.
- Use DocPop for unauthenticated integrations or where OnBase documents are available to the public. For example, Upop should not be used to provide public access to documents from a county Web site, because most public users would not have the Unity Client installed on their workstations.
- Use Upop if users send external email messages from the Unity Client only to other users who have the Unity Client installed on their workstations. Use DocPop if messages are sent to users who may or may not have the Unity Client installed.

## Network Connectivity

The Unity Client is a "connected" client. A poor network connection may result in errors or performance issues.

# 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.

# QUICK REFERENCE GUIDE

The following Quick Reference Guides are designed to serve as resources you can quickly reference for the available keyboard shortcuts and general usage of the Unity Client.



**Note:** For each shortcut, press all keys at the same time.

Global	
<b>Alt</b>	When on the <b>Home</b> tab, shows shortcut keys for the ribbon tabs and <b>File</b> menu. <b>Note:</b> The functionality of shortcuts using <b>Alt</b> may vary depending upon the active window, tab, or pane.
<b>F1</b>	Accesses the help files.
<b>Alt + Space</b>	Opens the system menu for minimizing, maximizing, and restoring the program.
<b>Alt + F4</b>	Closes the program.

Main Window	
<b>Ctrl + M</b>	Opens the <b>Home</b> layout.
<b>Ctrl + Q</b>	Opens the <b>Custom Queries</b> layout.
<b>Ctrl + R</b>	Opens the <b>Document Retrieval</b> layout.
<b>Ctrl + E</b>	Opens the <b>Forms</b> layout.
<b>Ctrl + N</b>	Opens the current layout in a new window.
<b>F8</b>	Opens the <b>Import</b> layout.

Data Lists	
<b>Ctrl</b>	Hold to select multiple items in a list.
<b>Ctrl + A</b>	Selects all items in a list.
<b>Ctrl + Shift + End</b>	Selects all items below the selected item in a list, including the selected item.
<b>Ctrl + Shift + Home</b>	Selects all items above the selected item in a list, including the selected item.

Keywords	
<b>F3</b>	Changes the operator for the selected Keyword Type.
<b>F4</b>	Changes the connector for the selected Keyword Type.
<b>F5</b>	Shows the drop-down select list for the selected Keyword Type.
<b>F6</b>	Adds another value for a Keyword Type.
<b>Ctrl + O</b>	Collapse or expand any Multi-Instance Keyword Type Group.

Re-Indexing	
<b>Esc</b>	Closes the <b>Re-Index</b> pane.

Import Layout	
<b>Ctrl + O</b>	Opens the <b>Browse</b> dialog.
<b>Ctrl + S</b>	Uploads the document.
<b>Esc</b>	Cancel the upload and clears the <b>Import</b> pane.
<b>Ctrl + Shift Up</b>	Moves the page open in the <b>Import Preview</b> pane up.
<b>Ctrl + Shift Down</b>	Moves the page open in the <b>Import Preview</b> pane down.
<b>Delete</b>	Removes the currently selected page in the <b>Import Preview</b> pane.

Import Layout	
<b>Ctrl + Delete</b>	Removes all pages.
<b>Ctrl + Left</b>	Rotates the page counter clockwise.
<b>Ctrl + Right</b>	Rotates the page clockwise.

Document Viewer	
<b>Ctrl + H</b>	Opens the <b>Document History</b> dialog.
<b>Ctrl + P</b>	Opens the <b>Print</b> pane.
<b>Ctrl + K</b>	Opens the <b>Add/Modify Keywords</b> pane.
<b>Ctrl + W</b>	Opens the <b>Cross-References</b> pane.
<b>Ctrl + U</b>	Toggles the thumbnail display.
<b>Ctrl + O</b>	Toggles text overlay when working with image documents.
<b>Ctrl + Mouse Wheel Up or Ctrl and +</b>	Zooms in on the document. <b>Note:</b> <b>Ctrl +</b> is not usable when working within a text document. Use the <b>Ctrl Mouse Wheel Up</b> shortcut to zoom in on text documents.
<b>Ctrl + Mouse Wheel Down or Ctrl and -</b>	Zooms out on the document. <b>Note:</b> <b>Ctrl -</b> is not usable when working within a text document. Use the <b>Ctrl Mouse Wheel Down</b> shortcut to zoom out on text documents.
<b>Ctrl + Page Up or F11</b>	Displays the previous page in a multi-page document.
<b>Ctrl + Page Down or F12</b>	Displays the next page in a multi-page document.
<b>Ctrl + Home</b>	Displays the first page in a multi-page document.
<b>Ctrl + End</b>	Displays the last page in a multi-page document.
<b>Ctrl + Shift + Page Up</b>	Displays the previous document in the Document Search Results list.
<b>Ctrl + Shift + Page Down</b>	Displays the next document in the Document Search Results list.
<b>Ctrl + G</b>	Opens the <b>Go to Page</b> dialog box.
<b>Ctrl + Right Arrow</b>	Rotates the currently selected pages 90 degrees clockwise.
<b>Ctrl + Left Arrow</b>	Rotates the currently selected pages 90 degrees counterclockwise.
<b>Ctrl + Down Arrow</b>	Rotates the currently selected pages 180 degrees.

Document Separation	
<b>Delete</b>	Deletes selected pages.
<b>Esc</b>	Exits the <b>Document Separation</b> layout without saving changes.
<b>Ctrl + S</b>	Saves selected documents.
<b>Ctrl + H</b>	Flips selected pages horizontally.
<b>Ctrl + .</b>	Rotates selected pages right.
<b>Ctrl + ,</b>	Rotates selected pages left.

Document Separation	
<b>Ctrl + J</b>	Joins selected pages. <b>Note:</b> This operation is only used in Page Display Mode.
<b>Alt and +</b>	Copies the selected document.
<b>Ctrl and +</b>	Copies selected pages in new document.
<b>Ctrl and Shift and +</b>	Copies selected pages in place.
<b>Ctrl + C</b>	Copies individual pages to the clipboard.
<b>Ctrl + X</b>	Cuts individual pages.
<b>Ctrl + V</b>	Pastes individual pages.
<b>Shift + Click</b>	Selects all pages between two selected pages. <b>Shift</b> must be held while clicking.
<b>Ctrl + Click</b>	Selects or deselects a page without deselecting other pages or documents.
<b>Ctrl + Drag</b>	Copies the page being dragged and dropped instead of moving the page to the new insertion point. <b>Note:</b> This operation is only used in Document Display Mode.
<b>Ctrl + Shift</b>	Selects multiple page ranges in multiple documents. These buttons must be held while clicking. <b>Note:</b> This operation is only used in Document Display Mode.
<b>Ctrl + Delete</b>	Enters <b>Delete Mode</b> .
<b>Alt + Home</b>	Scrolls to the first selected page of a document, if not already in view.
<b>Up Arrow / Page Up</b>	Scrolls up in the Separation Workspace. <b>Note:</b> This operation is only used in Document Display Mode.
<b>Down Arrow / Page Down</b>	Scrolls down in the Separation Workspace. <b>Note:</b> This operation is only used in Document Display Mode.
<b>Ctrl + Mouse Wheel Up</b>	Zooms in on the page open in Detailed View.
<b>Ctrl + Mouse Wheel Down</b>	Zooms out on the page open in Detailed View.
<b>Ctrl + Left Arrow</b>	Rotates the page open in Detailed View 90 degrees counterclockwise.
<b>Ctrl + Right Arrow</b>	Rotates the page open in Detailed View 90 degrees clockwise.

### Access the End-User Help Files

The Unity Client includes help files for end-users. These can be referenced at any time in the Unity Client either by pressing the **F1** button on your keyboard, or by clicking the **Help** button:



The help files are opened in a separate window.

### Set Your Home Page

The **Home** button takes you to your configured **Home Page**.



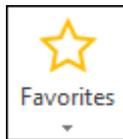
To set a layout to be your Home Page, navigate to the desired layout and select **Make this layout my Home Page** from the Home button drop-down menu.

To reset your Home Page to the default, select **Reset Home Page** from the Home button drop-down menu.

### Add Favorites

You can add the currently displayed layout to your list of favorites by performing the following steps:

1. Click the **Favorites** button:



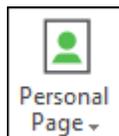
2. Click **Add this layout to my favorites**.

The favorite can be accessed by clicking the Favorites button again and selecting the favorite from the list.

### Use the Personal Page

Many OnBase items and layouts can be added to your Personal Page as tiles. Tiles serve as easy access points to the files, items, and interfaces of your choice.

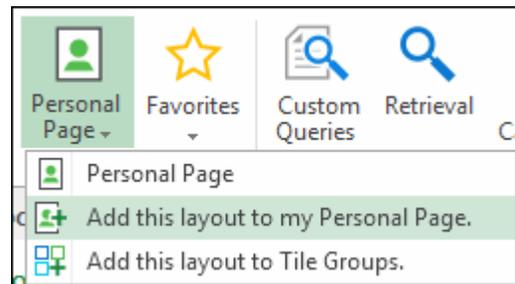
The Personal Page can be opened by clicking the **Personal Page** ribbon button:



### Use the Personal Page (Continued)

To add an item or layout to the Personal Page, right-click the object and select **Add To Personal Page**. If the right-click option is unavailable, the Personal Page option may be included under the **Send To** functions or, as is the case with Custom Query results, as a special menu option to **Add to Personal Page**.

When adding an entire layout to your Personal Page, select **Personal Page | Add this layout to my Personal Page** from the ribbon menu.



### Document Retrieval

You can retrieve documents in the Unity Client based on the document's keyword values, the text contained within the document, or the note information contained on a document. The following example describes how to retrieve documents based on their keyword values.

#### To access Document Retrieval:

1. In the **Documents** ribbon group on the **Home** tab, click **Retrieval**.



2. In the **Document Retrieval** pane, select a **Document Type Group**.

Select a **Document Type**.

**Note:** The information contained in the panel may dynamically change based on the Document Type Group or Document Type you selected.

3. If desired, you can specify a date range to only return documents that were created or imported between a certain range of dates.
4. A list of keyword fields displays below the date range.

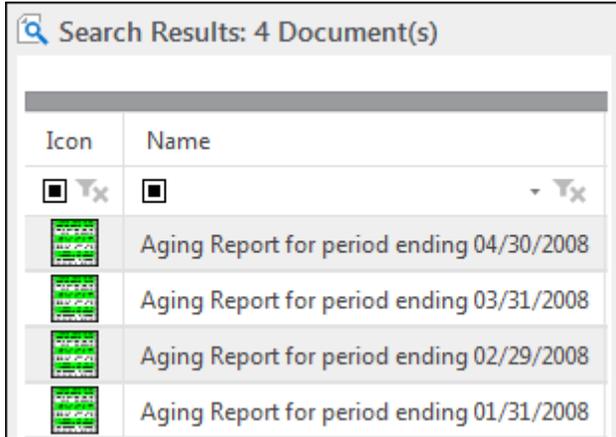
Enter values for the keywords that are displayed. You can enter as much or as little information you know.

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

5. When you have entered all search criteria, click the **Find** button at the bottom of the panel.

**Document Retrieval (Continued)**

The **Search Results** are displayed in a list on the right side of the screen.



6. Double-click a document from the list to open it.

**Import Documents**

To import documents in the Unity Client:

1. In the **Create** ribbon group on the **Home** tab, click **Import**.



The **Import** layout is displayed.

2. Select the document you want to import by doing one of the following actions:

- Browse to the file location of the document you are importing by clicking the **Browse** button,
- Scan a document, or import a document image from another supported digital storage device such as a scanner or camera, by clicking the **Acquire** button,
- If configured, select a document stored or created in Google Drive by clicking the **Drive** button, or
- Drag and drop the file you want to import into the white space next to the **Import** pane.

3. Select a **Document Type Group** for the document.

Select a **Document Type** for the document.

4. Enter all of the necessary keyword values in each field.

5. When you are finished entering the necessary keyword values, click the **Import** button to import the document into OnBase:



**Document Separation**

Image and PDF documents can be manipulated in the **Document Separation** layout. Documents and their individual pages can undergo multiple editing processes in this layout such as splitting, joining, rotation, and copying. Documents can be deleted or created within Document Separation. Pages can be dragged to different documents, or to an empty area to create a new document.

**Document Separation (Continued)**



To send one or more documents to Document Separation, select **Split** from the **Re-Index** pane, the **Edit Pages** button in the **Image** tab of an open document, the **Send To | Document Separation** option from the ribbon or right-click menu, or drag and drop the document(s) into an existing Document Separation window.

To switch between **Document Display Mode** and **Page Display Mode**, toggle the **Group by Documents** button:



Keep important pages separate while reorganizing and editing documents by dragging them to the **Page Holder**.

Double-click a page to open it in **Detailed View**, which allows for full-scale viewing, rotation, and flipping.

Click **Join** to join two or more documents through the **Merge Documents**, **Join Pages**, or **Append After Page** options.



Click **Split** to separate a document through the **Split** or **Break into Documents** options.



The thumbnails within Document Separation can be adjusted by accessing the **Thumbnail Settings** from the ribbon menu.

**Envelopes**

Envelopes are collections of documents that you can compile and share with other OnBase users. Any document can be put into an envelope, regardless of content or Document Type.

Envelopes can be created and viewed by clicking the **Envelopes** ribbon button on the **Home** tab.



Select an envelope to view its contents.

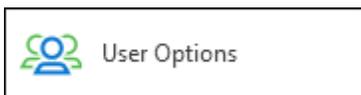
If you would like to share an envelope with other users, select the desired envelope and click **Share Envelope**.



**Selected Users** are the users sharing the envelope with you. Users can have **Full Control** over the envelope, can be permitted to **Add to Envelope** and/or **Remove from Envelope**, or can just be allowed to view the envelope contents. Adjust user permissions as needed.

**User Options**

System functionality and appearance can be customized in the **User Options**. The User Options dialog is accessed through the **User Options** button in the **File Menu**.



**General** Unity Client behavior and display features, **Document** display options, **Document Import** options, **Printing** options, **Retrieval Date** options, and **Service Mode** options can be set here.

**Note:** The Service Mode tab is only available when the Unity Client is running in Service Mode.

**Note:** Some User Options may be enforced by an administrator-designated **User Option Policy**.

**To apply User Options:**

1. Select the desired options in each tab. Selection controls for options vary (check boxes, text fields in which you can insert a number or date range, etc.).
2. After you have selected the appropriate options, click **Save** to save your changes and to close the User Options dialog.

**Generate CSV Files**

**Document Search Results** lists can be exported as .csv files. CSV files can contain metadata pertinent to the documents included. Keywords, DocPop URLs, and Document Dates are examples of information fields that can be included in your CSV output.

**Note:** CSV files cannot be generated from Full Text Search result lists.

**To generate a CSV file:**

1. Right-click within a Document Search Results list and select **Generate CSV File**. The **Generate CSV File** window is displayed.
2. Configure your file as desired. The document **Range** and resulting **Columns** within the CSV file can be adjusted here.
3. In the **Save to File** field, enter the name and location that will be used to save the CSV file. You can select **Browse** to navigate to the correct location.
4. Click **Launch Associated Application** if you would like to view the CSV file after you click **Generate**. The file will be opened by your default CSV application.
5. Click **Generate**. The CSV file has been created at the specified location.

Or click **Cancel** to cancel the process and return to the search results list.

**Send Mail**

Internal mail messages can be sent to other OnBase users. Documents and folders can be sent within the Unity Client to other users. If you need to send documents to non-OnBase users, external mail messages can contain documents as attachments, or can include documents, folders, Custom Query Results, E-Forms, and Unity Form Creation pages as **Unity Pop Links** or **Unity Pop Files**. Recipients of Unity Pop Links and Files must be OnBase users.

**Send To | Internal User**

Selecting this option will allow you to send the selected or open document or folder to another OnBase user. A new mail message dialog is displayed and recipients, attachments, and message body text can be edited as needed.



Received internal mail messages can be checked by clicking the **Mailbox** button in the ribbon menu.

**Send to | Mail Recipient**

Selecting one of the two Mail Recipient options will allow you to send the selected or open item to a user outside of OnBase.

**Note:** A functional, supported email client is required to send OnBase items externally.

Selecting **Send to | Mail Recipient (as Attachment)** will attach the document(s) to a new message dialog in your configured external email client.

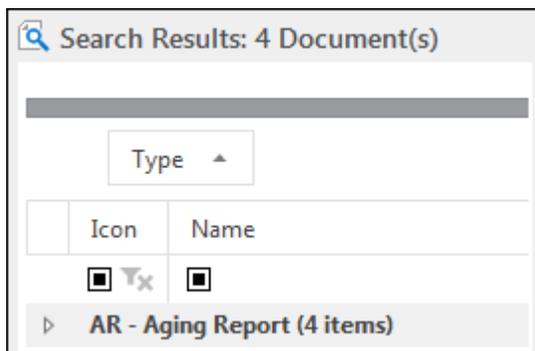
Selecting **Send to | Mail Recipient (as Link)** opens a blank email message containing a link to the item(s) or XML file that references the content in OnBase, depending on your configuration.

**Document List Organization**

Document lists can be organized to better suit your needs. Lists can be organized through grouping, sorting, column reordering and stacking, and filtering through operators and drop-down lists.

**Grouping**

Drag a column heading to the space above a data list to group the list by that column.



**Document List Organization (Continued)**

**Sorting**

Lists can be sorted by column values. Click on a column heading to sort the list in descending order. Click the column heading again to sort in ascending order.

Type	Date
AR - Aging Report	1/31/2008
AR - Aging Report	2/29/2008

**Reordering and Stacking Columns**

Click and drag a column to the area between two columns to move it to that location:

Date	Type
	AR - Aging Report
	AR - Aging Report

Click and drag a column onto the header of a different column to stack the columns:

Type	Date	Date
AR - Aging Report		1/31/2008
AR - Aging Report		2/29/2008

**Document List Organization (Continued)**

**Filtering**

The Custom Queries, Document History, Document Retrieval, Mailbox, and Users layouts support filtering. Operators, drop-down lists, and custom filters are available methods of list filtering.

Click the operator button in the desired column to view available operators:

Users	
ID	
	1
	101
	103

Click the drop-down list arrow to view available drop-down list options:

Users	
ID	
	1

**Note:** Operator and drop-down list options vary by column.

Select **Custom** from a drop-down list to open the **Custom Filter Selection** dialog box. You can create your own data list filter using conditions and operators.