OnBase Web Client User Guide

Version 12.0

General Web Client options for Document Retrieval
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ABOUT THIS GUIDE
The ESU OnBase web client user guide provides you with detailed, step-by-step instructions that explain general navigation and processing in the OnBase Web Client. Anyone who uses the ESU OnBase Web Client should have a copy of this reference guide.

In addition to the step-by-step instructions, Notes and Tips are provided to help you along the way. However, another resource for working with the OnBase Web Client is the OnBase Web Help. If you have a question about OnBase, click on the Help button to open the Web Help system.

If you are unable to find the information you need in this guide or in the Web Help system, please contact the IT HelpDesk at extension 5555, toll free at 877-341-5555 or via email to helpdesk@emporia.edu.
WEB CLIENT SETUP

If this is your first time accessing OnBase, please follow the “Instructions for Setting up Internet Explorer” instructions found on esuobweb.emporia.edu to make sure your Internet Explorer is configured to access OnBase.

LOGGING IN

To access the Web Client:

1) Open Internet Explorer and go to [http://esuobweb.emporia.edu](http://esuobweb.emporia.edu). The OnBase Web Client login options screen displays. If using an on campus computer and logged onto the computer with your username, click on the first link to enter the ESU OnBase web server. Your computer will be logged in automatically.

2) If you are using an off campus computer or need to sign in with an alias username – select the second option for off campus users and login with your username/password.

3) From the Web Client, you will be able to retrieve and view documents from the OnBase system. Depending on your security access, you will be able to see a screen similar to this:
NAVIGATION PANEL OVERVIEW

When logged into OnBase, you will see the document retrieval window. This section will explain more about the navigation panel. The Navigation Panel is comprised of several sections that provide document retrieval, processing, and user options. These sections dynamically change as you select and perform various functions.
Navigation and Sub-Navigation Menus

The Navigation Menu is the first drop-down menu, it displays the OnBase options available to you based on your user security.

The next drop-down menu, the Sub-Navigation Menu, displays additional retrieval methods and processing options based on your Navigation Menu choice. These options are also based on your user rights and security.

- **Document** opens the Document Retrieval window.
- **Workflow** opens the Workflow window for workflow processing.
- **StatusView** opens a view for Eforms available
- **Folders** opens the Folders view for Graduate Student Files
- **Help** opens the OnBase Web Client help systems.
- **Exit** closes all open windows and processes and exits the OnBase Web Client.

- **Document Retrieval** opens the Document Retrieval window.
- **Custom Queries** displays a list of pre-defined, task-specific searches.
- **New Form** displays a list of all blank form templates that you have been granted access to in OnBase.
- **Import Document** is used to import files into OnBase from a location that you can browse to from your computer.
- **Indexing** opens the Indexing window so that you can index scanned batches of documents.
A quick note about the date fields on the Navigation Panel. These dates are the dates the document was CREATED in OnBase, NOT the date indicated on the document for searching purposes. For example, when a graduate document is scanned into the system, the date it was scanned in is indexed automatically but has no relation to the date information located inside the document. The ONLY time you should use the date fields is to narrow down a document search based on documents created within a time frame in the OnBase system and should only be used by the individuals creating documents in OnBase.

![Date fields](image)

The next section of the Navigation Panel displays a set of four sections, for **Document Search**: Document Selection, Keywords, Text, and Note. These tabs are associated with the Document Retrieval navigation option.

![Navigation Panel](image)

The Keywords tab displays your Keyword Type options to search specific documents. Keywords dynamically changed based on the document type you select to search. For example, if you are searching for a Grad Assistant document, you see the keywords on the left. If you are searching for a Form C, you will see different keywords to search by (e.g., last name, payroll begin date).

**TIP!** To retrieve documents across multiple Document Types, select each Document Type (use CTRL or SHIFT + left mouse button). As each Document Type is highlighted, any assigned Keyword Types that are common will display in the Keywords frame. If no Keyword Types are common across the selected Document Types, only the date can be used. Otherwise, you should redefine your search until at least one common Keyword Type is available.
The Text tab displays text search options, however, documents scanned into OnBase are unable to be searched for based on text on the document. Do not use this option to search for documents.

The Note tab displays note search options. There are various types of notes created in OnBase. Based on your security access, you can search for information in a Note that could be attached to a document.

Notes have various levels of access, including read only. If a note is attached to a document, you will see a yellow box, looking much like a Post-It® note at the top left hand corner of the document.

To search, you must select the Note Type and in the search string, any word you expect to find in a note. (e.g., award, post)
The final section displays your Document Retrieval Menu. These menu items are associated with executing a document search.

**Find** initiates your document retrieval based on your selected search criteria. Search criteria can include either a single selection or a combination of Document Type(s), date range, keywords, text search detail, or note search detail.

**History** displays a list of all of the searches you have initiated during your active OnBase session. If you log out and log back into OnBase, the History list automatically resets.

**Clear Keywords** clears all keyword values currently displayed on the Document Retrieval window so you can begin another search.

**Clear All** clears all selected options and keyword values.

**Retrieve by Document Handle** retrieves a document by the unique number it is assigned when it is imported into OnBase.
FAQ's about using OnBase

The Document Retrieval and Folders dialog windows are your means of retrieving and viewing documents in OnBase. While there are other ways to retrieve documents in OnBase, the Document Retrieval dialog window is the default retrieval method that provides you with a variety of filters for streamlining the search process.

As your electronic file cabinet, each section of the Document Retrieval dialog window represents a unique component: The Document Type Groups section represents the file drawer, the Document Types are the file folders, and the Documents that you search for and retrieve are the pages within the file folders. The Document Types and Document Type Groups you can access are based on your OnBase user profile.

What is a keyword type?

When a document Type is selected, the Keywords tab displays the assigned Keyword Types. Keyword Types are used to quickly identify and retrieve your documents for viewing in OnBase.

For example, if the assigned Keyword Type is Student Name, the keyword’s value might be SMITH DUDE (note: in most cases, last name is first, followed by a space and the first name and if applicable, followed by a space and middle initial/name). The student name keyword type can be assigned to different Document Types, which means it is in “common” with both Document Types (e.g., Grad Asst 08 and Grad). This allows you to search across document types using coming Keyword Types.
Using Keywords to Search

The following Keyword Type search options are based on the keyword values (alphanumeric or numeric) and configuration of the keyword.

- **Equal To** allows you to search for keyword values that are an exact match to what you have entered for retrieval. Clicking on the **Equal To** button will cycle through the options below.

- **Not Equal To** allows you to search on any keyword values that are not equal to what you have entered for retrieval.

- **Double Quotes** returns only those documents containing the literal entry.

- The **Drop-down List** provides a list of keyword values for selection. Enter a start value and click on the drop-down arrow. Depending on what you entered, a list of matching values will display for your selection.

- **Greater Than** allows you to retrieve keyword values greater than the numeric value you have entered for retrieval.

- **Less Than** allows you to retrieve keyword values less than the numeric value you have entered for retrieval.

- **Greater Than/Equal To** allows you to retrieve keyword values greater than or equal to the numeric value you have entered for retrieval.

- **Less Than/Equal To** allows you to retrieve keyword values less than or equal to the numeric value you have entered for retrieval.

- **F6** opens a second entry field for the active keyword value.

- **AND** allows for searching two or more values of the same keyword type that exist on the selected Document Type.

- **OR** allows you to search either one (or more) documents containing either one or more specific Keyword Types.

- Click the **AND** button to change the button to the **OR** button.
WORKING WITH DOCUMENTS

Documents in OnBase can be manipulated for better viewing or adding notes. The toolbar options that display depend on the type of document you are retrieving (image, PDF, Microsoft Word). Toolbar options for the Document Type that you are viewing are also available from the right-click menu.

Additional toolbar button options may be added based on your user rights.

Viewer Control Toolbar

The Viewer Control toolbar is used for navigating, manipulating, processing and scaling documents.

![Viewer Control Toolbar](image)

- First Page returns you to the first page of the document.
- Previous page moves you back one page.
- Next Page moves you forward one page.
- Last page takes you to the last page of the document.
- Zoom In increases the zoom area of the document you are viewing.
- Zoom Out decreases the zoom area of the document you are viewing.
- Zoom Area increases or decreases the zoom area based on a percentage that can be selected from the drop-down list.
- Actual Size adjusts the size of the document to its actual width (as though it were printed).
- Fit width fits the width of the document to the size of the window.
Fit In Window adjusts the document’s size to the best all-around fit for your window.

Rotate Left rotates the document 90 degrees to the left.

Rotate Right rotates the document 90 degrees to the right.

Overlay is designed to allow you to view the document with an overlay—ESU does not use overlays at this time.

Print opens the print dialog window. NOTE: Do NOT click the Internet Explorer Print button; it will not print your OnBase document.

Options allow you to change the thumbnail height and width as well as the size of the zoom area when you click on it.
WEB CLIENT DOCUMENT DISPLAY

In the lower left-hand corner of the open window, is the document page number display. This indicates the number of pages contained in the current document.

The Thumbnails pane displays when you move your mouse beyond the right border of the open document. Thumbnails can be used for quick access to any page that is part of the current document. If you pause your mouse over a thumbnail, you will receive a quick zoom of that page.

You can also change the currently displayed page of a document by double-clicking on the thumbnail of the page you wish to view.
**DOCUMENT MENU OPTIONS**

**Document Search Results Hit List**

- **Keywords** will display all Keyword Types and keyword values assigned to that document.

- **History** lists past actions performed on the selected document.

- **Print** opens the Print dialog box.

- **Send To** provides four menu options:
  - **Mail Recipient** allows you to e-mail the document to a specified recipient if the settings for your user are configured correctly in OnBase. Contact Cheryl O’Dell for more information.
  - **File** allows you to save the document to a specified file.
  - **Internal User** allows you to send the document to another user in OnBase. However, this is internal to OnBase, does not send it to the user outside of OnBase. Contact Cheryl O’Dell for more information.
  - **Envelope** allows you to include the selected document(s) in an envelope. At this time ESU does not use this functionality.

- **Re-Index** displays the re-indexing window. This option is activated based on your user rights.

- **Delete** will remove the document from OnBase, if you have rights to do so.

- **Open in New Window** allows you to open any document from the hit list in a secondary window.

- **Create List Report** creates a text document containing details of the document(s) selected. NOTE: You must have security access to create a list report. Contact Cheryl O’Dell for more information.

This menu displays when you highlight and right-click on a document from the Document Search Results hit list. Depending on your user rights, you may not have access to all options.