

Web Client Overview

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

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

Logging On and Logging Off

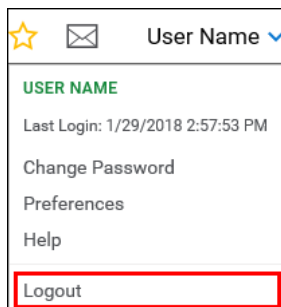
To log on to the Web Client:

1. Access the Web Client logon website.
2. In the **User Name** field, enter your user name.
3. In the **Password** field, enter your password.
4. Click the **Login** button or press **Enter**.

The Web Client interface is displayed.

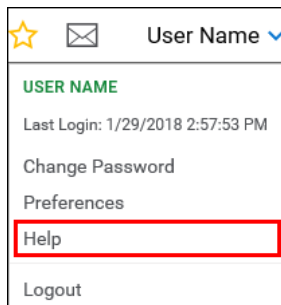
To log off of the Web Client:

1. Click the User Menu drop-down menu next to your user name.
2. Select **Logout**:



Accessing the End-User Help Files

The Web Client includes help files for end-users. These can be referenced at any time in the Web Client either by pressing the **F1** keyboard button, or by clicking **Help** in the User Menu drop-down menu:



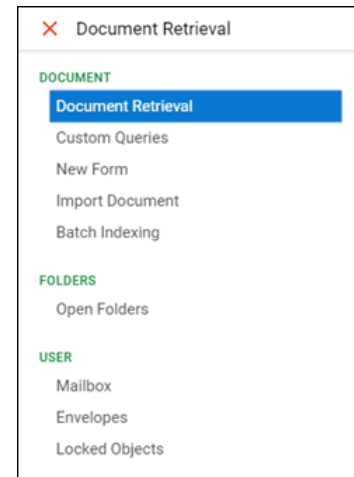
The help files are opened in a separate window. To open the Web Client help, click **Web Client** from the navigation pane on the left side of the new help files window.

You can also open help files for different OnBase modules that use the Web Client. Simply click the name of the module for which you want to view help.

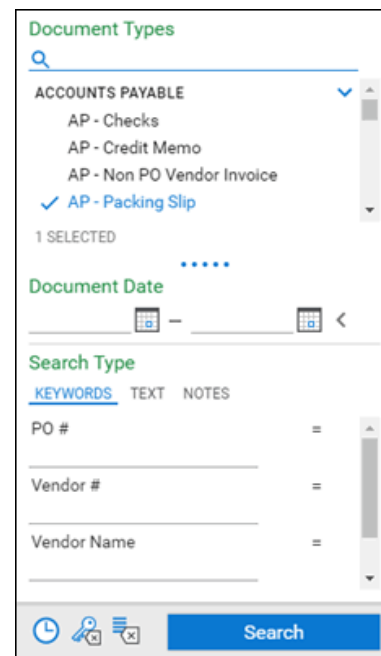
Navigating the Web Client

The **Main Menu** allows you to access the various modules and functions available to you in the Web Client. The default position of the Main Menu button is the upper left side of your screen.

The options that are available in the Main Menu are determined by your system administrator.



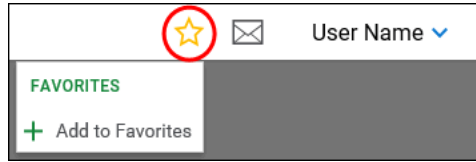
The **Navigation Panel** provides options for working with documents in OnBase. The Document Retrieval option is displayed by default when you log into the Web Client, but the Navigation Panel changes when you select different options in the Main Menu.



Adding Favorites

You can add the currently displayed context to your list of favorites:

1. Click the **Favorites** button:



2. Click **Add to Favorites**.
3. Enter a name for the new favorite and click **OK**.

The favorite can be accessed by clicking the **Favorites** button again and selecting the favorite from the list.

Document Retrieval

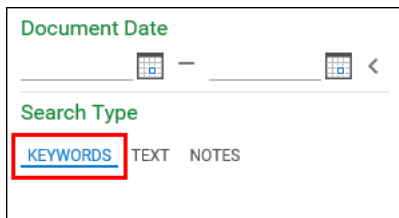
You can retrieve documents in the Web Client based on the document's keyword values, the text contained within the document, or the note information contained on a document. The following example describes how to retrieve documents based on their keyword values.

To access Document Retrieval mode:

1. Click the Main Menu list and select **Document Retrieval** in the Document group.
2. Select a **Document Type**.

Note: The information contained in the panel may dynamically change, based on the Document Type Group or Document Type you select.

3. If desired, you can specify a date range to return only documents that were created or imported between a certain range of dates.
4. Click the **Keywords** tab:



A list of keyword fields is displayed below.

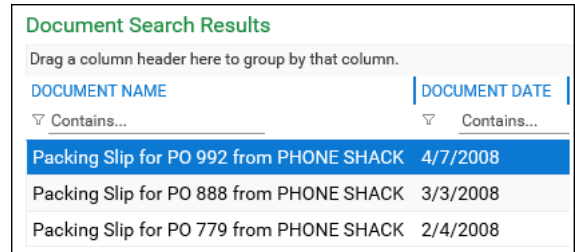
5. Enter values for the keywords that are displayed. You can enter as much or as little information you know.

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

6. When you have entered all search criteria, click the **Search** button at the bottom of the panel.

Document Retrieval (Continued)

The results of your search are displayed in a list on the right side of the screen.

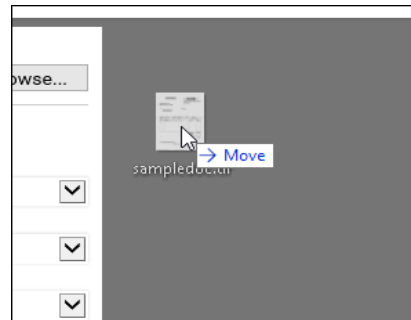


7. Double-click a document in the list to open it. The document is displayed in the area below the list.

Importing Documents

To import documents in the Web Client:

1. Click the Main Menu list and select **Import Document** from the **Document** group.
The indexing panel 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, or
 - Drag and drop the file you want to import into the empty space next to the indexing panel:



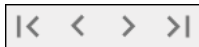
When you are finished adding a file, it is added to the **Document Queue**, and assigned a status of **Pending Import**.

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 at the bottom of the panel to import the document into OnBase.
When the document is finished importing, the status **Imported Successfully** is displayed.

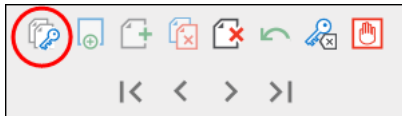
Batch Indexing

To index a batch of documents in the Web Client:

1. Click the Main Menu list and select **Batch Indexing** in the **Document** section.
The **Batch Statuses** panel is displayed.
2. Under **Batch Statuses**, select a batch status queue.
A list of available batches displays to the right.
3. Right-click the queue with the documents you want to index and select **Index Documents**.
The batch is retrieved and the first unindexed document is displayed in the document viewer. As you index each document, each additional unindexed document is displayed in the viewer.
4. In the indexing panel, select a **Document Type** for the document.
A list of keyword fields is displayed below.
5. Enter values for the keywords that are displayed. You can enter as much or as little information you know.
If you are indexing multiple documents, click the **Next Document** arrow to navigate to the next document.
You can navigate between different documents in a batch by using the following navigation buttons:



6. When you are finished indexing documents, click the **Index Documents** button in the indexing toolbar:



The batch of documents is indexed and saved to the queue.

Note: When the batch is saved, the indexing status may change. For example, if you index a few documents in an **Awaiting Index** batch and then save the batch, the status is changed to **Index In Progress**.

Global	
F1	Accesses the help files.
Ctrl + F4	Closes the open dialog box.
Alt + F4	Closes the Web Client.

Keyword Panel	
F3	Toggles the Keyword Operator button.
F4	Toggles the Logical (Boolean) Operator button for duplicate Keyword Type fields.
F5	Expands a Keyword Type field's Keyword Select List (if one exists).
F6 or Ctrl + T	Creates a duplicate Keyword Type field. Ctrl + T not supported in Chrome.
Ctrl + R	In Document Retrieval, displays the Keywords search tab.
Ctrl + S	In Document Retrieval, displays the Text search tab.
Ctrl + N	In Document Retrieval, displays the Note search tab. Not supported in Chrome.
Ctrl + I	Activates the Search button.
Ctrl + K	Activates the Clear Keywords button.
Ctrl + C	Activates the Clear All button.
Ctrl + O	Expands or collapses Multi-Instance Keyword Type Groups.

Document Select List (HTML Web Client)	
Ctrl + K	View or modify keywords for the selected document.
Ctrl + H	View the document history for the selected document.

Document Viewer (HTML Web Client)	
Ctrl + K	View or modify keywords for the selected document.
Ctrl + H	View the document history for the selected document.
Ctrl + N	Displays the Add Note dialog box for the current document. Not supported in Chrome.
Ctrl + Shift + N	Displays the View Notes dialog box for the current document. Not supported in Chrome.
Ctrl + P	Displays the Print dialog box.
Ctrl + W	Initiates a cross-reference from the current document.

Document Viewer (ActiveX and HTML Web Client)	
Ctrl + F6	Navigates to the previous document.
Ctrl + F7	Navigates to the next document.
Ctrl + Page Up	Navigates to the previous page of the document.
Ctrl + Page Down	Navigates to the next page of the document.

Document Viewer (ActiveX and HTML Web Client)	
Ctrl + Home	Navigates to the first page of the document. (Not available in the ActiveX Web Client.)
Ctrl + End	Navigates to the last page of the document.
Home	Navigates to the top of the current page.
End	Navigates to the bottom of the current page.
Page Up	Quickly scrolls up the current page.
Page Down	Quickly scrolls down the current page.
Up Arrow	Slowly scrolls up the current page.
Down Arrow	Slowly scrolls down the current page.
Ctrl + Up Arrow	Quickly scrolls up the current page.
Ctrl + Down Arrow	Quickly scrolls down the current page.
Left Arrow	Slowly scrolls to the left on the current page.
Right Arrow	Slowly scrolls to the right on the current page.
Ctrl + Left Arrow	Quickly scrolls to the left on the current page.
Ctrl + Right Arrow	Quickly scrolls to the right on the current page.
+ (on numeric keypad)	Zooms in on the current page. (Only available in the ActiveX Web Client)
- (on numeric keypad)	Zooms out on the current page. (Only available in the ActiveX Web Client)

Folders	
Ctrl + F	Opens the Find Folder dialog box when focus is on the Folder Tree.

Internal Mail	
Ctrl + M	Selects the text in the Message text box.
Ctrl + R	Reply to a message.
Ctrl + O	Forward a message.
Ctrl + S	Send a message.
Ctrl + D	Delete the selected message.

User Preferences	
Tab	Change the focus between radio buttons, drop-down menus, text entry fields, check boxes, and the Save button.
Arrow Keys (Up, Down, Left, Right)	Navigate between radio buttons, and scroll within a drop-down list.
Space Bar	Select or deselect a check box, and expand a drop-down list.
Enter	Save the configured user preferences.

Workflow^a (ActiveX and HTML Web Client)	
F9	Opens Workflow.
Right Arrow	Expands the selected life cycle or, when in the inbox, navigates down the item list.
Left Arrow	Collapses the selected life cycle or, when in the inbox, navigates up the item list.
Ctrl + F6	In the separate viewer, this navigates to the previous document.
Ctrl + F7	In the separate viewer, this navigates to the next document.
F10	Executes Workflow Ad Hoc Task #1 (the ad hoc task bar must have focus).
F11	Executes Workflow Ad Hoc Task #2 (the ad hoc task bar must have focus).
F12	Executes Workflow Ad Hoc Task #3 (the ad hoc task bar must have focus).
Tab	Navigates to the next item in the screen.
Shift + Tab	Navigates to the previous item in the screen.
Enter	Pressing enter executes on the selected item. The following are examples of functions that occur when pressing enter depending on the item selected: Life cycles will expand, queues will open, and ad hoc tasks will execute.

- a. When licensed for Workflow, these shortcuts are available in the ActiveX and HTML Web Client.

Workflow^a (HTML Web Client)	
Ctrl + K	Accesses keywords (select list and viewer).
Ctrl + H	Accesses history (select list and viewer).
Ctrl + N	Adds Note (viewer only). Not supported in Chrome.
Ctrl + A	Show All Documents (select list only in a queue configured for autofeed).
Ctrl + O	Show Other User's Documents (select list only).
Ctrl + V	Turns on Combined View (within Life Cycle View tab).
Ctrl + S	Combined View Settings (select list only).
Ctrl + R	Route Document (select list only).

- a. When licensed for Workflow, these shortcuts are available in the HTML Web Client.

WorkView^a	
Ctrl + S	Saves the open object.
Ctrl + E	Saves and closes the open object.
Ctrl + N	Saves the open object and opens a new object. Not supported in Chrome.
Ctrl + D	Deletes the WorkView object.
Ctrl + R	Adds a new row (edit mode).

- a. When licensed for WorkView, these shortcuts are available.