

EMPORIA STATE UNIVERSITY

OnBase Graduate Advising User Guide

Version 14.0

General Web Client options for Document Retrieval, Folders, and using Banner Integration (i.e., AppEnabler)

Contents

ABOUT THIS GUIDE	3
Retrieving Graduate Student Folders	4
RETRIEVING DOCUMENTS.....	5
How to search for graduate student files from OnBase	5
Using the F6 key	8
Using Banner Integration – AppEnabler to view student documents	11
Using CUSTOM QUERIES to Retrieve Documents.....	13
WEB CLIENT SETUP	15
NAVIGATION PANEL OVERVIEW	Error! Bookmark not defined.
Navigation and Sub-Navigation Menus	Error! Bookmark not defined.
FAQ’s about using OnBase	Error! Bookmark not defined.
What is a keyword type?	Error! Bookmark not defined.
Using Keywords to Search.....	Error! Bookmark not defined.
WORKING WITH DOCUMENTS.....	Error! Bookmark not defined.
Viewer Control Toolbar	Error! Bookmark not defined.
WEB CLIENT DOCUMENT DISPLAY	Error! Bookmark not defined.
DOCUMENT MENU OPTIONS.....	Error! Bookmark not defined.
Document Search Results Hit List	Error! Bookmark not defined.

ABOUT THIS GUIDE

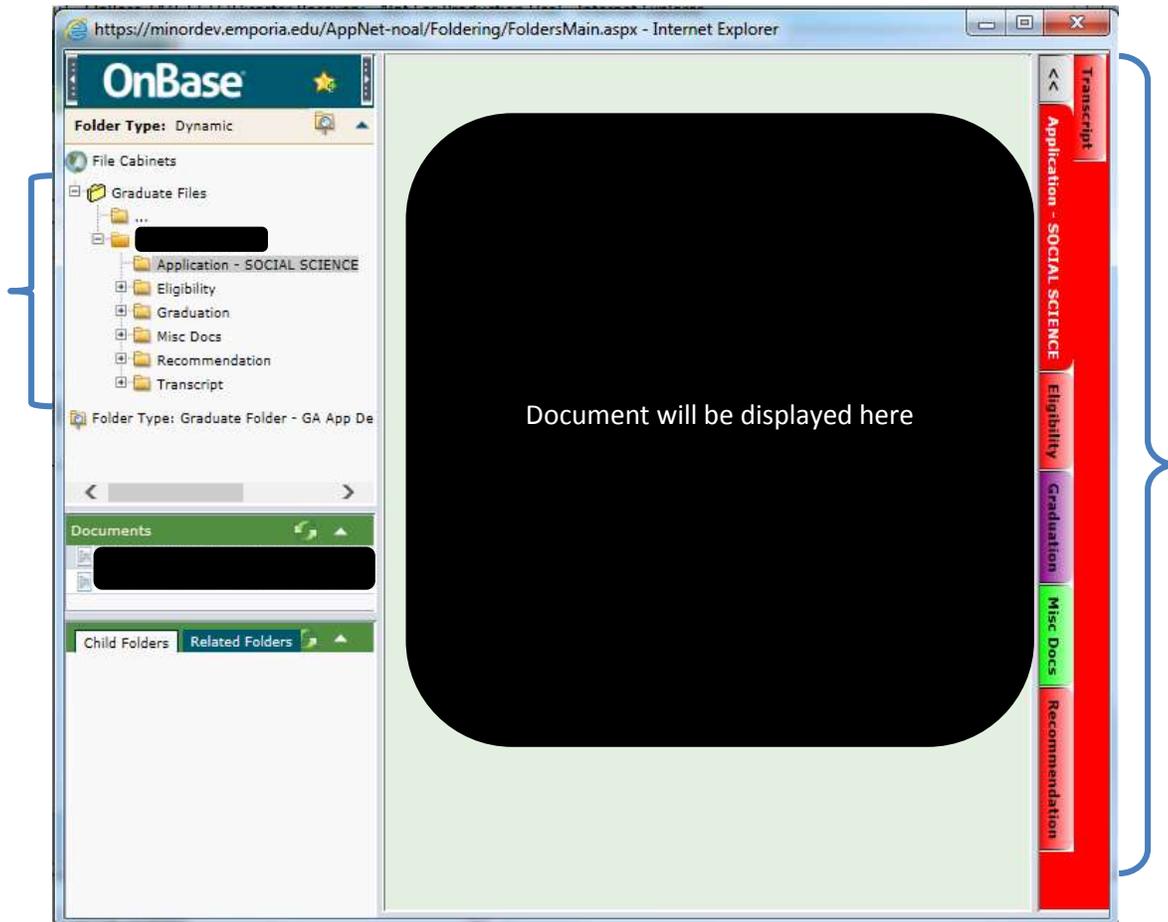
The ESU OnBase web client user guide provides you with detailed, step-by-step instructions that explain general navigation and processing in the OnBase Web Client for graduate departments and advisors. Any graduate advising users should have a copy of this reference guide.

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.

Retrieving Graduate Student Folders

Graduate documents are available in the Folder View. This will allow users to view the different types of documents in a graduate student's file through folder tabs. Below is an image of the folder view for a graduate student:



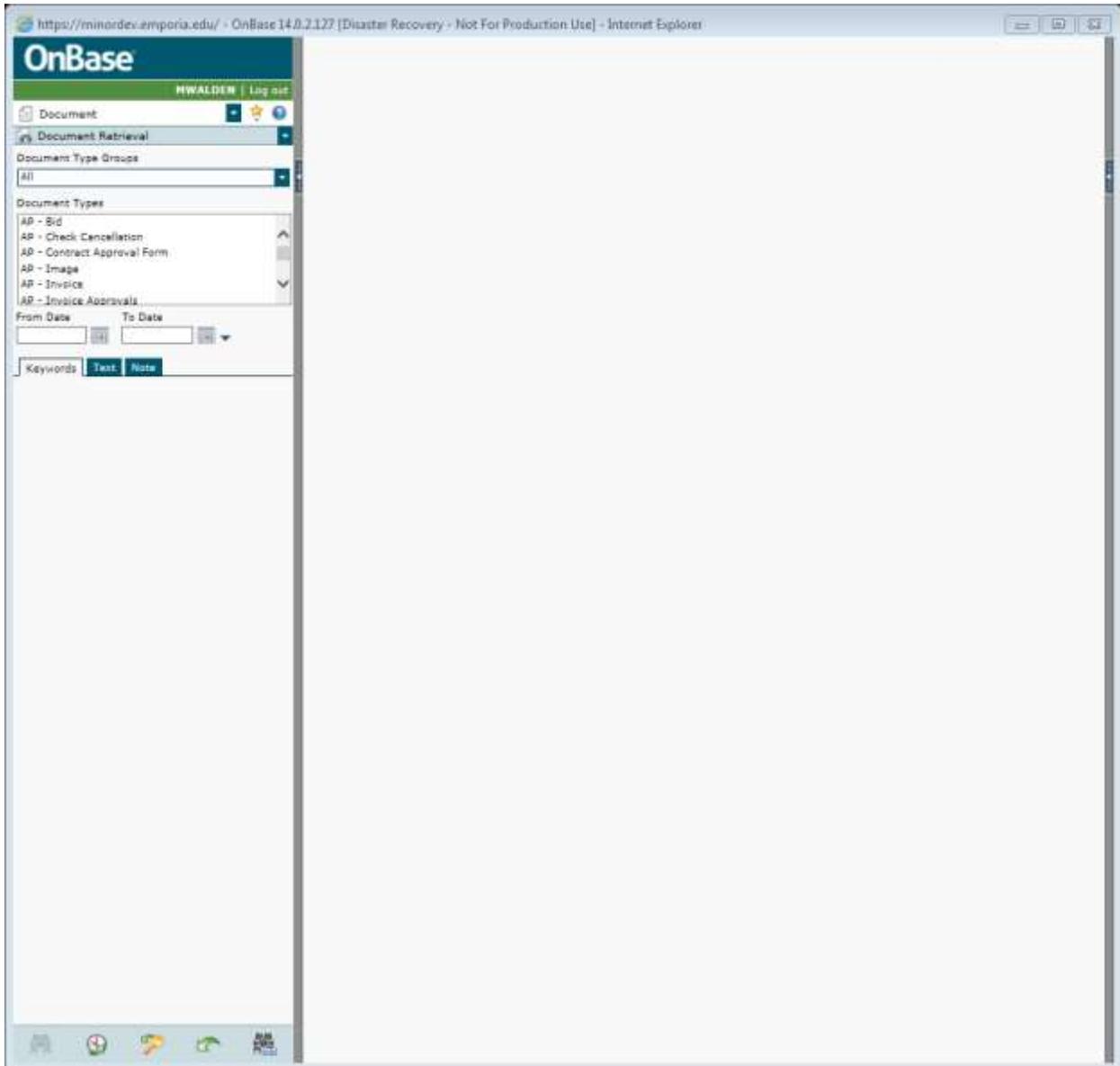
You will notice different colored tabs on the right of the screen – red tabs are for Graduate Admission documents; green tabs are for Miscellaneous Documents; orange tabs are for Graduate Assistantship applications; and violet are for Graduation documents for degrees, certificates, and licensure. To view the documents available for a specific type of document, click on the folder tab. You can also view the different folders by selecting the folder on the left hand of the screen.

The graduate student's application document will always be listed first. In the case of students seeking multiple degrees, there will be a separate application folder tab per department of study. In addition, the status of the graduate student will be displayed on the application. The yellow background box displays the status – in this example, the student has been admitted and has a GRAD status. The status could be In Progress, To Be Accepted, and Grad.

RETRIEVING DOCUMENTS

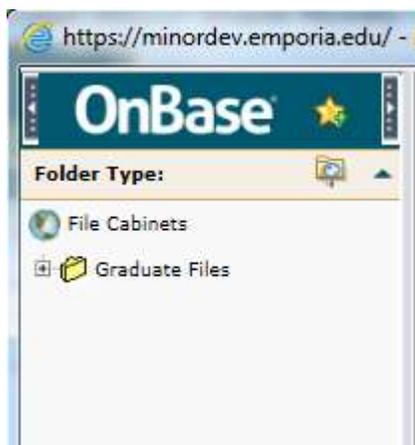
How to search for graduate student files from OnBase

1. Once you login to the OnBase Web Client, you will see this screen:

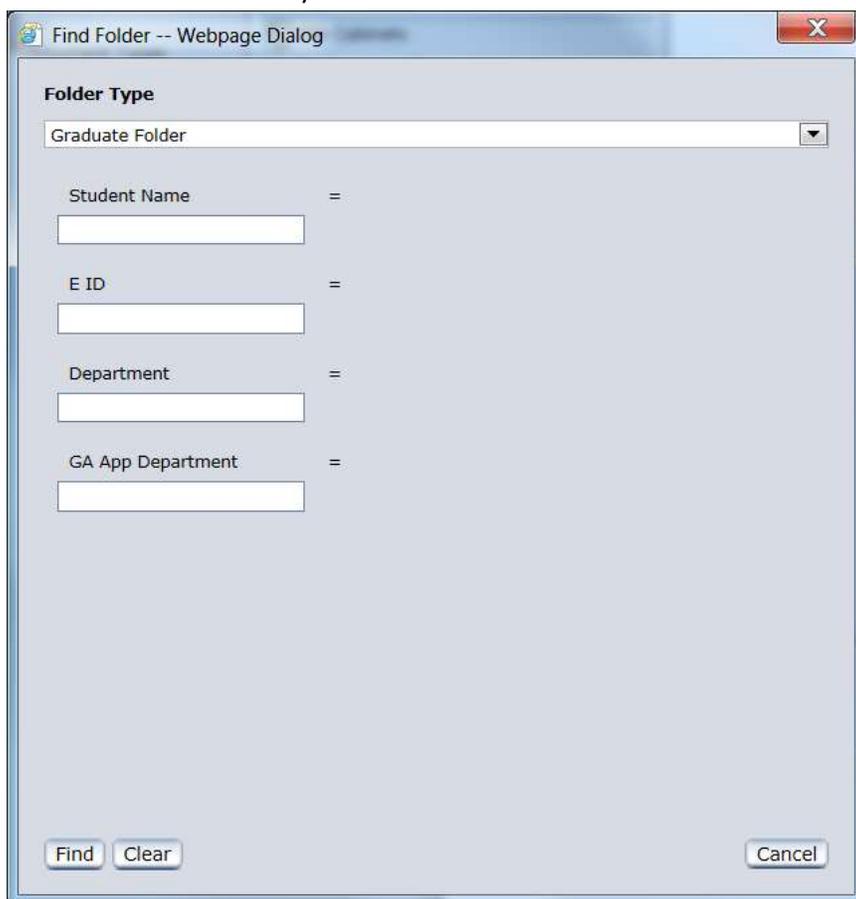


2. Select the arrow next to Document in the navigation panel and select FOLDERS.

3. You will then see a screen like this:



4. Click on "Graduate" and you will see a screen like this:



5. Enter the search terms you want to search by. If you know the students EID, enter the EID and click FIND. You can also search by student name (last name first!) and/or by department. If you are searching for all students in your department's Graduate program, enter your department in the "Department" keyword field. If you want to search for graduate students applying to be graduate assistants in your department, enter your department in the GA App Department field.

Find Folder -- Webpage Dialog

Folder Type

Graduate Folder

Student Name =

E ID =

Department =

GA App Department =

Find Clear Cancel

NOTE: Wildcard searches are encouraged. For example, if you know the last name of the student begins with DEBOA, you can enter DEBOA* in the Student Name Keyword Type field and any students who last name begins with DEBOA will be found. (If you know the Student's First Name, you can search by *MARY and get all documents for students whose first or middle name includes MARY—such as ROSEMARY, HILDA MARY, etc. However, this search could yield unwanted results and make it difficult to find the documents you need to view.) Wildcards can be used in any of the keyword fields.

NOTE: If you do not enter any criteria, you will receive an error message about the number of documents in the result set exceeds the number of documents allowed in a query. You MUST enter some type of search criteria.

NOTE: Each department storing documents in OnBase have denoted which keyword types can be used for searching. Not all keyword types are available on every document type.

Using the F6 key

TIP! If you want to view more than one student's documents – with your cursor on the EID line, hit F6 to add another EID line and enter another EID. Then you can click on the AND, select OR. Then click FIND.

Find Folder -- Webpage Dialog

Folder Type

Graduate Folder

Student Name =

E ID =

E10000765 AND

E ID =

999999999

Department =

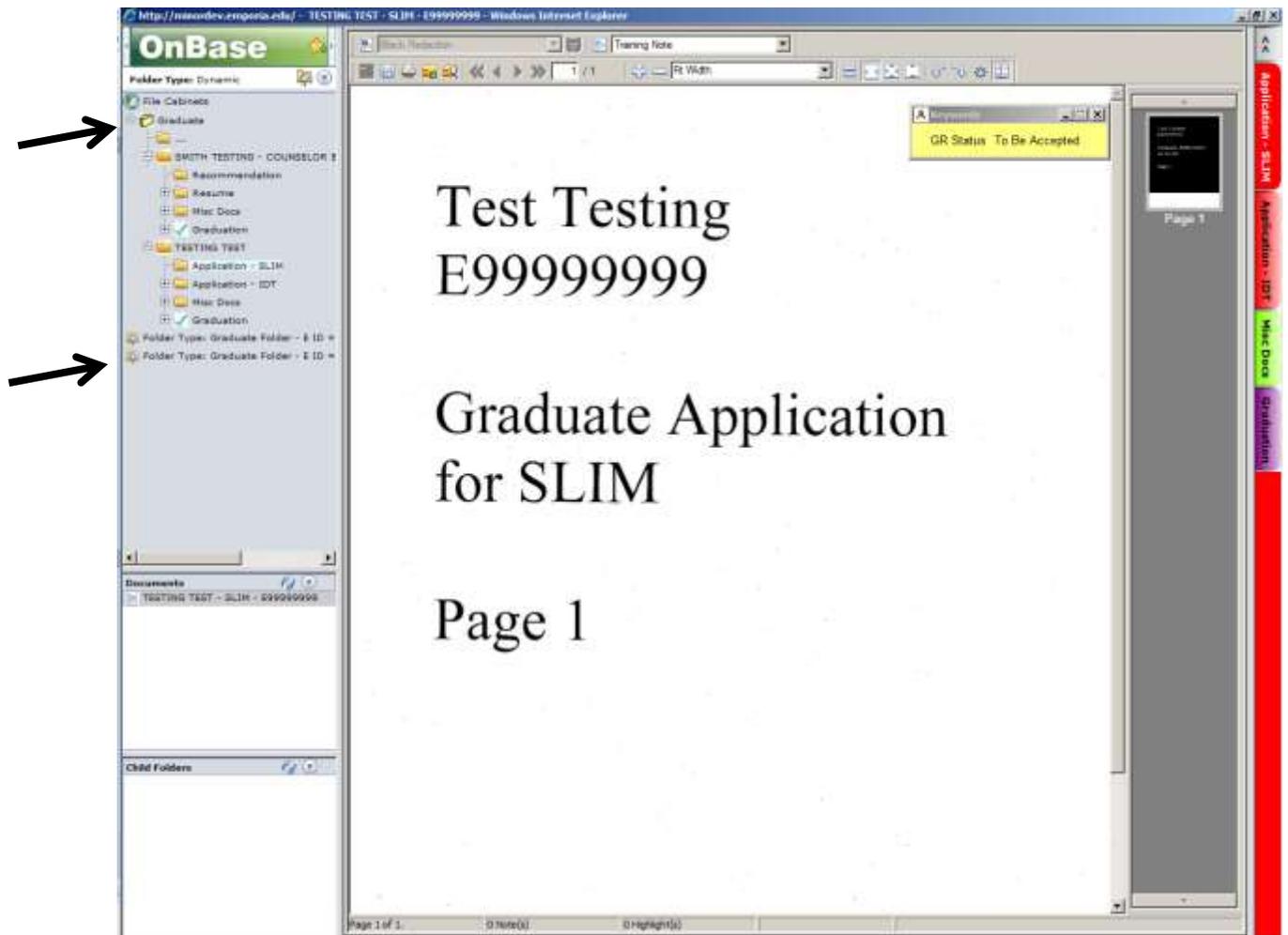
GA App Department =

Find Clear Cancel

The Search Results will be listed on the bottom left panel so you can select at your convenience on the different student folders without doing an additional search.



6. If you entered only one criteria for the search, and a file is found, the folders will display automatically. If you selected to search more than one student's file, you will need to double click on the student's file you want to view and the folder view will be displayed. Once the folder structure is displayed, it will look similar to this:



7. To see the results from the previous search, you can click on the previous searches in the upper left hand pane. To start a new search, click on the Graduate folder.

Using Banner Integration – AppEnabler to view student documents

OnBase is the electronic file cabinet, and it can be accessed by viewing specific screens in INB or SSB (e.g., Banner). From the INB screens of SHADEBR, SAADMS, SGASADD, or SGASTDN, you can enter the EID of the student, hit the keys SHIFT and F9, and the graduate student's folders in OnBase will be opened automatically for you. For instance – in the following image, someone was looking up a graduate student on INB SGASTDN screen....

Oracle Fusion Middleware Forms Services: Open > SGASTDN

File Edit Options Block Item Record Query Tools Help

General Student: SGASTDN 8.5.0.3 (prod)

ID: E10334109 Cauthon, Cameron J. Student Summary Term: View Current/Active Curricula

Learner Curricula Study Path Activities Veteran Comments Academic and Graduation Status Outcomes Miscellaneous

General Learner

New Term: From Term: To Term:

Student Status: Student Type: Residence: Fee Assessment Rate: Class: Student Centric Cycle: Full or Part Time: Full Time Part Time None

Additional Information

Site: Session: Block: Citizenship: Citizen

Curricula Summary

Priority Term	Program	Catalog	Student Type: Level	Campus	Rate: College	Degree
End:	Outcome Key:	Admission Type:	Admission:	Matriculation:		

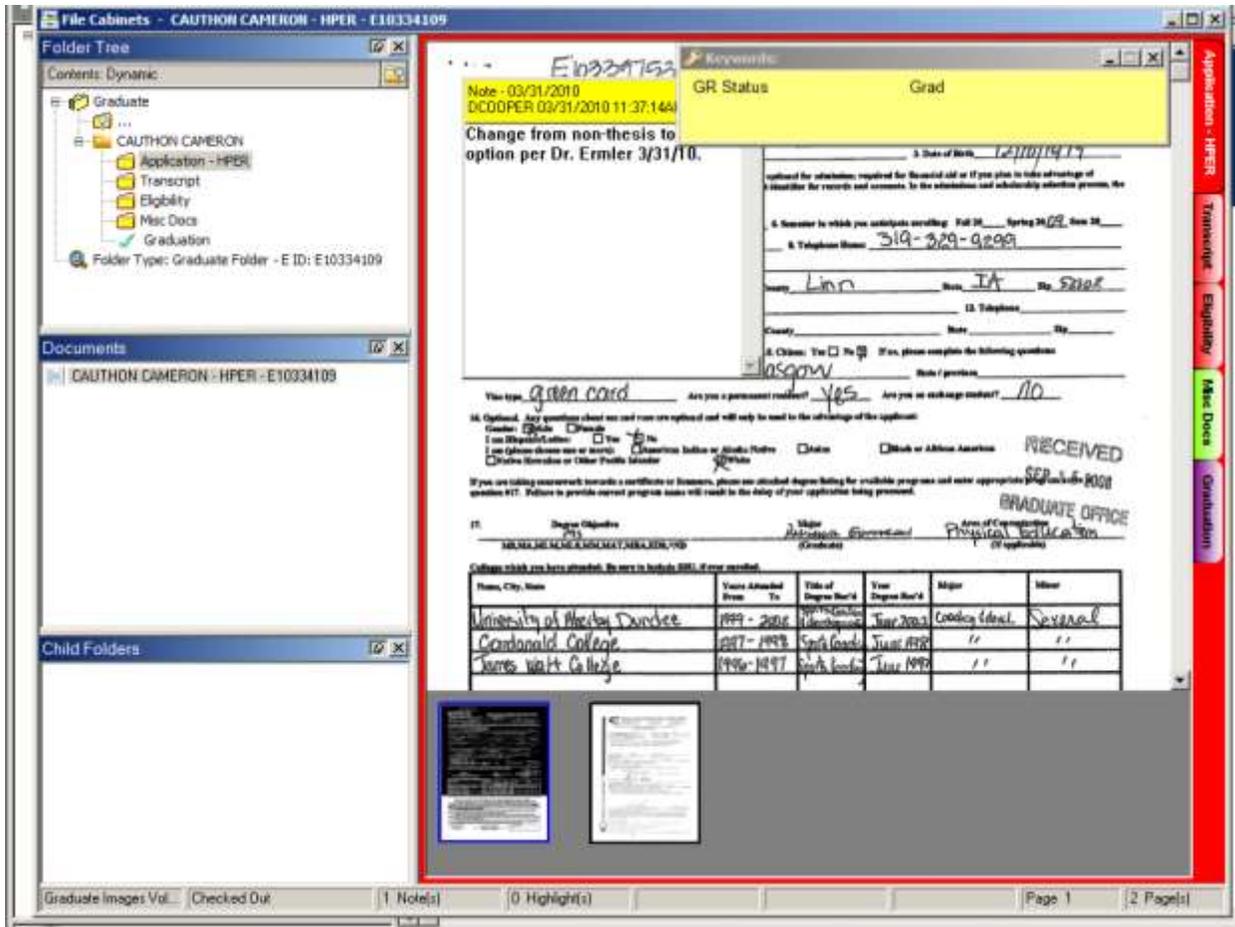
Field of Study Summary

Priority Term	Type	Field of Study	Department	Attached to Major

Term code, press LIST for valid codes, HELP for summary.

Record: 1/1 | List of Valu... | <OSC>

.....and while in the EID field, they held down the SHIFT key and pressed the F9 key:



When hitting the SHIFT-F9 key combination in the INB SGASTDN screen, OnBase was opened, logged in with your userid, and did a search for the graduate student’s files and displayed them in the folder view.

This robust functionality is limited to some INB and SSB screens at this time. AppEnabler is available for Windows based computers, and to use this functionality, IT will need to install software on your desktop computer. Contact the IT HelpDesk to schedule the install.

Using CUSTOM QUERIES to Retrieve Documents

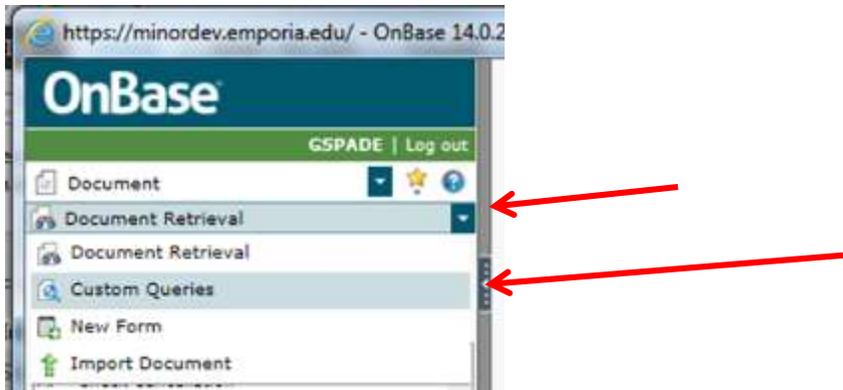
Because graduate documents have been split up into separate document types, the normal document retrieval is different to see all a student's folders. To make it easier, Custom Queries have been written. There are 3 Custom Queries setup for graduate schools:

Grad Asst Files Alpha Lookup: This will allow you to enter search criteria to see graduate students who have applied for graduate assistantship positions. You can search by EID, by student name (lastname firstname), by department, and/or by semester.

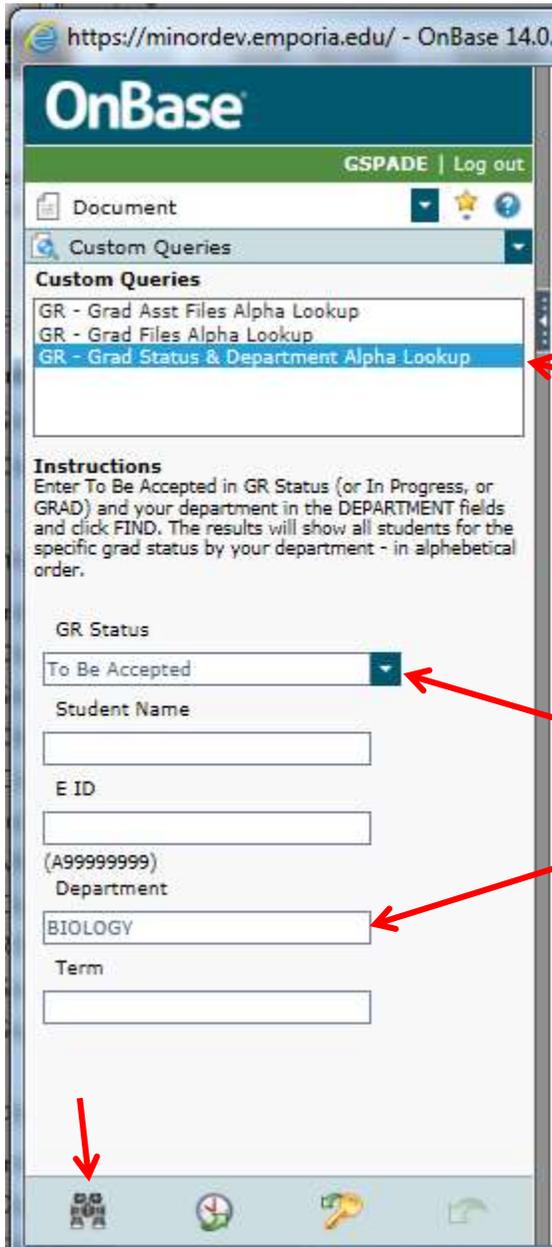
Grad Files Alpha Lookup: This will allow you to enter search criteria to see all of a graduate student's documents. You can search by EID, student name, department, and/or term.

Grad Status & Department Alpha Lookup: This query will allow you to select a grad status of either In Progress, To Be Accepted, or GRAD and a department to see all students in your school's program by the status. For example, if you wanted to view all graduate students waiting to be accepted into your school's program, select To Be Accepted in the GR Status field, and enter your department in the Department field and click the find icon (or press enter).

To get to Custom Queries, click on the arrow next to Document Retrieval on the sub-navigation menu and select Custom Queries:



The screen will now be showing the Custom Queries you have access to run. Select one, fill in the criteria and click on the FIND icon.



WEB CLIENT SETUP

In order to use the web client, currently, you must use Internet Explorer 8 or 9. Please follow these instructions to make your Internet Explorer ready to access OnBase:

- 1) Open Internet Explorer.
- 2) Setup security and privacy settings:
 - a. Click on Tools, Internet Options and click on the SECURITY tab.
 - b. Click on TRUSTED SITES and then click on the SITES button.
 - c. Click OFF the "require server verification https: for all sites in this zone", on the top line, type over what's listed and enter

*.emporia.edu

and click on ADD.
 - d. Click CLOSE.
 - e. Click on CUSTOM LEVEL button, scroll down to the ACTIVE X CONTROLS SECTION and click on ENABLE for the "Allow Scriptlets" option; a couple of options below that option - click on ENABLE for the "Automatic Prompting for Active X Controls" option. Scroll down to the MISCELLANEOUS section and click on ENABLE for the "Access data sources across domains" option and a little further down, click on ENABLE for "Display mixed content" option.
 - f. Scroll to the bottom of the list – under User Authentication, select "AUTOMATIC LOGON WITH CURRENT USERNAME AND PASSWORD".
 - g. Click OK.
 - h. If prompted something like are you sure you want to change, click YES.
 - i. Click on the PRIVACY tab.
 - j. If the Pop-Up blocker is enabled, click on the SETTINGS button.
 - k. On the top line under "Address of website to allow:", enter

*.emporia.edu
and click on ADD.
 - l. Click CLOSE and click OK to close the Internet Settings window.
- 3) Go to <http://emporia.edu/onbase> and click on the second link titled "Off Campus users or Form C Alias users—Click here...." Login with username of TRAINING9 and password of TRAINING9.
- 4) If you see a message about "Failed to load...", click OK. Otherwise go to the next step.



5) If you see the message about “A pop-up blocker has been detected...”, click OK again.



6) If you see a message near the top of the screen as shown below, click the bar “Pop-up blocked...”, then click “Always Allow Pop-ups...”. When prompted, click YES.



7) When you see the message about “To display the webpage again,...”, click “Retry”



- 8) You will see another message about an ACTIVE X control needing installed, click on the bar and click “Run Add-on”. When prompted, click RUN.



- 9) If you receive a “Failed...” message, just click “OK”



- 10) Click on the information bar regarding installing an Active X control and select “Install this Add-on for all Users.” If you see a message about displaying the webpage again, click RETRY.



11) Make sure to select “**MORE OPTIONS**” (it's a small link on the left side of the install window--this is very important!! Do not skip this!)



12) Select 'Always Install software from 'Hyland Software, Inc'', Then Install.

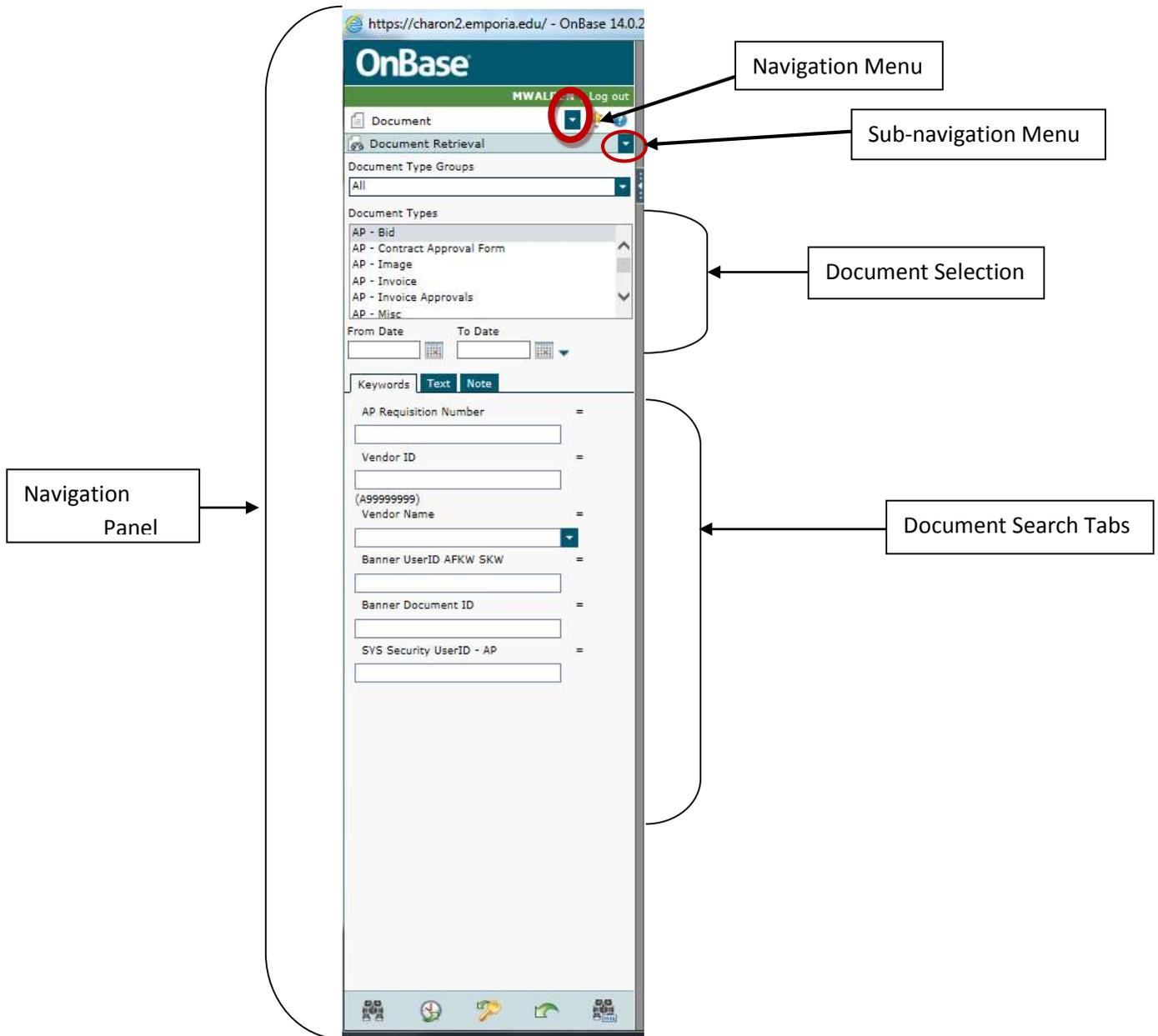


- 13) Click on the IT – Training AUP document type and click on the binoculars at the bottom of the screen. When you go to retrieve a document **the first time**, you might see ACTIVE X CONTROL INSTALLING--wait for it to install; it takes 20-30 seconds and it will display the correct information. Double click on any of the documents listed, and wait for the ACTIVE X CONTROL to install.

Logout of OnBase, close the Internet Explorer Window. You are now ready to go to <http://emporia.edu/onbase> and click on the first link. You will be automatically logged into OnBase.

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.

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.

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 Retrieval** opens the Document Retrieval window.

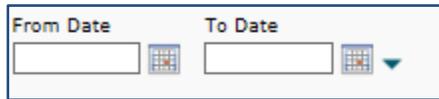
 **Custom Queries** displays a list of pre-defined, task-specific searches.

 **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.

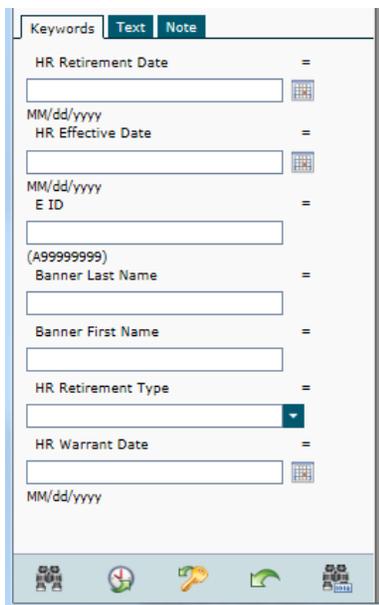
 **Indexing** opens the Indexing window so that you can index scanned batches of documents.

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.



The image shows a search interface with two date input fields labeled 'From Date' and 'To Date'. Each field has a calendar icon to its right. A small downward arrow is visible to the right of the 'To Date' field.

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.



The image shows the 'Keywords' search tab in OnBase. It features several search criteria with input fields and operators: 'HR Retirement Date' (MM/dd/yyyy), 'HR Effective Date' (MM/dd/yyyy), 'E ID' (A99999999), 'Banner Last Name', 'Banner First Name', 'HR Retirement Type' (dropdown menu), and 'HR Warrant Date' (MM/dd/yyyy). A toolbar with various icons is visible at the bottom.

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 an HR Retirement Application, you see the keywords on the left. If you are searching for a Grad Transcript document, you will see different keywords to search by.

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.

Keywords | **Text** | Note

Search String

Text
 Number
 Formatted Number

Find First
 Case Sensitive
 Whole Word Match
 Wild Card Search
 Create Report

Report Description

Lines Before

Lines After

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.

Keywords | **Note** | Text

Search String

From Date To Date

Note Owner

Note Types

<Any>

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.

PROCESSING FORM C DOCUMENTS

Form C's are used to hire faculty and unclassified professionals. To create a Form C, see the instructions below. Please note – that once a Form C is submitted – the ONLY way to change any values on the form is through the WORKFLOW window.

How to create a Form C

1. In the Navigation menu, Document should be selected (if not, click the down arrow and select it).
2. In the Sub-Navigation menu, click the down arrow and select NEW FORM.
3. In the form list, click on FORM C.
4. The Form will be displayed in the right hand frame. Enter the Employee ID (EID) of the employee and click on LOAD EMPLOYEE INFO.

NOTE: EVEN IF THE EMPLOYEE IS A NEW EMPLOYEE, YOU MUST CLICK ON THE LOAD EMPLOYEE INFO BUTTON FOR DROP-DOWN LISTS TO BE POPULATED.

5. Fill in the fields appropriately. For question son how to fill in the fields, contact Barb Kern.

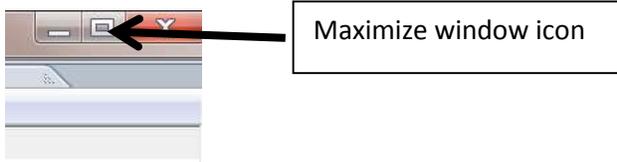
NOTE: YOU CANNOT SAVE THE PROGRESS OF THE FORM, WHICH MEANS ONCE YOU START FILLING IN THE FORM, YOU MUST FINISH. THERE IS A TIMEOUT FEATURE SET TO 60 MINUTES WHICH MEANS ONCE YOU CLICK FORM C, YOU HAVE 60 MINUTES TO COMPLETE THE FORM C AND CLICK SUBMIT/SAVE. YOU CANNOT FILL IN PART OF THE FORM AND CLICK SAVE; YOU WILL RECEIVE A MESSAGE NOT ALL THE FIELDS ARE COMPLETE. IF YOU EXIT FROM ONBASE WITHOUT FINISHING THE FORM, YOU WILL LOSE YOUR WORK.

6. Once the form is ready to be submitted, click on the SUBMIT/SAVE button. There are scripts which will run to verify some of the entries on the form. If the form is filled out correctly, you will see a prompt question “Are there any changes to the static information for this employee?” If there are changes to the employee’s information you did not have access to change, select YES and in the next box, denote the change. If there are no changes, select NO.
7. After the form is submitted, you may continue to enter another Form C, click YES on question to submit another form. Otherwise, click CANCEL.

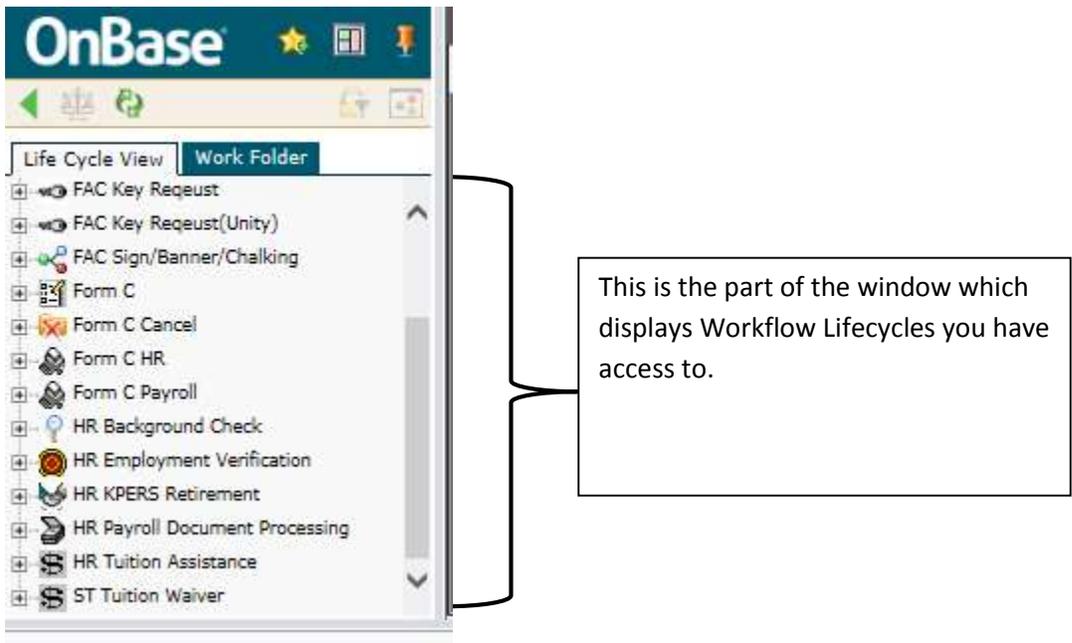
Navigating the Workflow Window

To access the Workflow Window, in the Navigation menu, select the drop-down arrow and select WORKFLOW. An additional browser window will open.

You can maximize the Workflow window by double-clicking on the Workflow's Internet Explorer title bar, or by click on the maximize icon.



The Workflow window has different icons and is organized differently. The window has 3 separate areas. The first area is the Workflow Navigation frame.



This will return your view back to the main OnBase Web Client window, typically the document retrieval window.



This icon is only available to the administrator for load balancing.



This icon refreshes the queue counts.

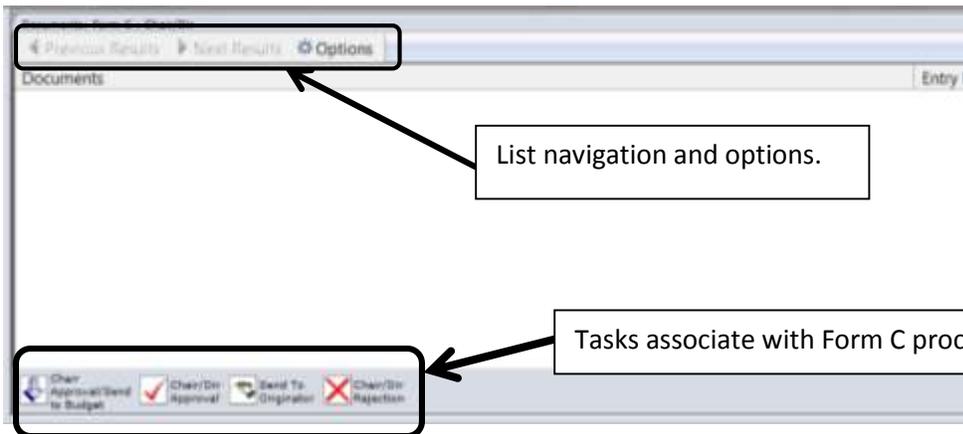


This icon is used to apply filters. Currently no filters are available.



This icon will change the view to the graphical view of the Lifecycle.

The second part of the Workflow window is the document list and task selection.



The list will be populated when you select a queue with documents to be processed. If there are more results to display, the NEXT RESULTS option will be bold so it can be selected. You can navigate between screens of documents by selecting PREVIOUS RESULTS or NEXT RESULTS. If either of them are greyed out, it means there are no more results to display.

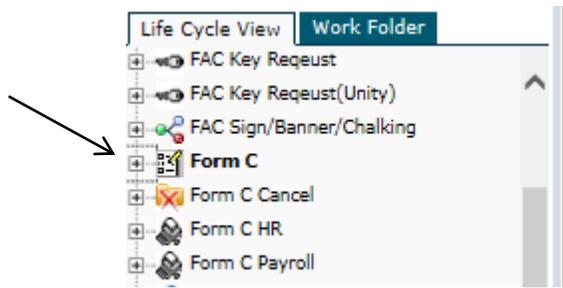
The OPTIONS icon will allow you to change the number of results listed per page and to change the option to display the tool bar button labels.

The task selection is dynamic; it changes based on which Form C queue you have selected to process documents. For example, the CHAIR/DIR queue has tasks to approve, send back to the originator or reject. Tied to each task is a list of commands which will run in the background after the task is selected. For the Form C, when an "approval" type of task is selected, the name of the user and the current date is stamped onto the Form C, which is considered the approval.

The last part of the Workflow window is the document viewer window. It displays the currently selected document. If no document is selected, the window will be blank. To view a document, double-click the document name in the document list (the second part of the Workflow window).

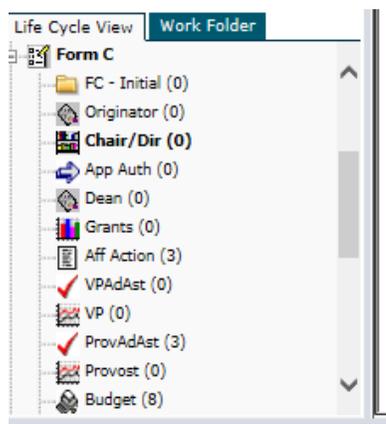
How to Process a Form C

1. With the Workflow browser window displayed, you will see the Workflows you have access to in the upper left hand window. Expand FORM C by clicking on the + sign.



- Under Form C, you will see the workflow queues you have access for processing. Next to the name of the queue, you will see a number. If the number is 0, there are no Form C's in your queue. If the number is greater than 0, click on the queue name and in the upper right hand frame, there will be the name of the document which needs processing.

NOTE: If there is only one document, it will automatically display in the lower half of the screen; if there is more than one document, you will have to double-click on the document you wish to select and process.



- After selecting the document, you can review the document and make the appropriate task selection.

NOTE: It is possible to attach a NOTE to the Form C BEFORE approving it, sending it back or rejecting. BEFORE selecting the appropriate task, right click on the form displayed in the lower half of the screen and select NOTES, ADD NOTE. Select NOTE and click OK. Type the message you want others to view in the note (up to 128 characters) and then click the appropriate task. The note will be saved onto the form and can be viewed by others who are authorized to view the document.

If you have specific questions regarding information on the Form C, contact Barb Kern.

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 common 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

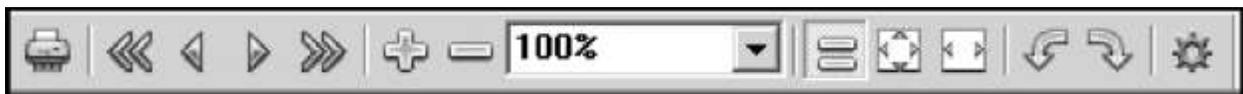
WORKING WITH DOCUMENTS

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.



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.



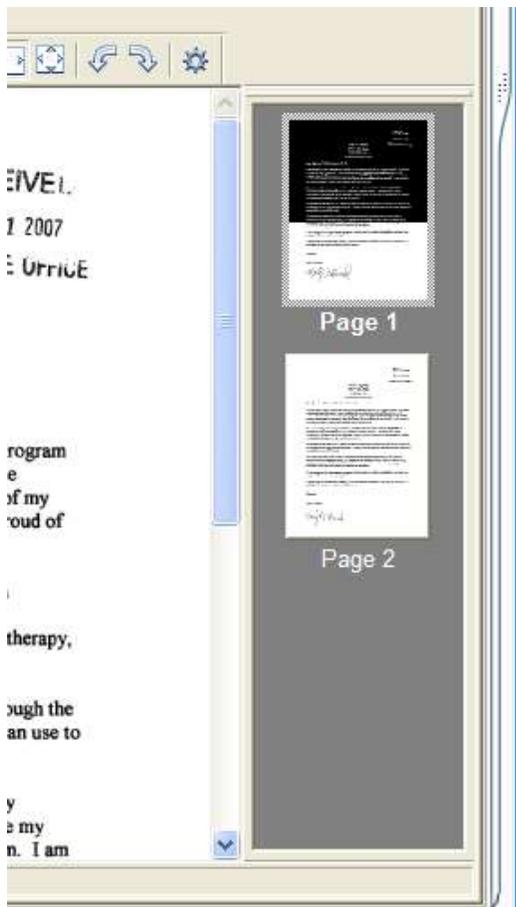
Options allow you to change the thumbnail height and width as well as the size of the zoom area when you click on it.

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.



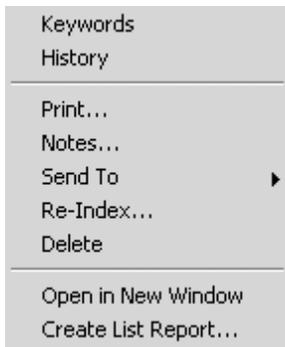
The Thumbnails pane displays when you move your mouse beyond the right border of the open document. Thumbnails can be used for quick access to any page that is part of the current document. If you pause your mouse over a thumbnail, you will receive a quick zoom of that page.



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



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.

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 Blaine Smith 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 Blaine Smith 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 Blaine Smith for more information.