



# **OnBase Client User Manual**

## **Quick Guide for Experienced Users**



10/18/2004

# Table of Contents

<b>Introduction.....</b>	<b>1</b>
<b>Logon.....</b>	<b>2</b>
This Is The Way It Used To Work.....	2
This Is How It Works Now.....	3
<b>Document Retrieval/Query.....</b>	<b>4</b>
This Is The Way It Used To Work.....	4
This Is How It Works Now.....	5
<b>Viewing Documents.....</b>	<b>6</b>
This Is How It Used To Work.....	6
This Is How It Works Now.....	8
<b>Printing Documents.....</b>	<b>10</b>
This Is How It Used To Work.....	10
This Is How It Works Now.....	11
<b>Adjusting The OnBase Web Client Window.....</b>	<b>12</b>



## **Introduction**

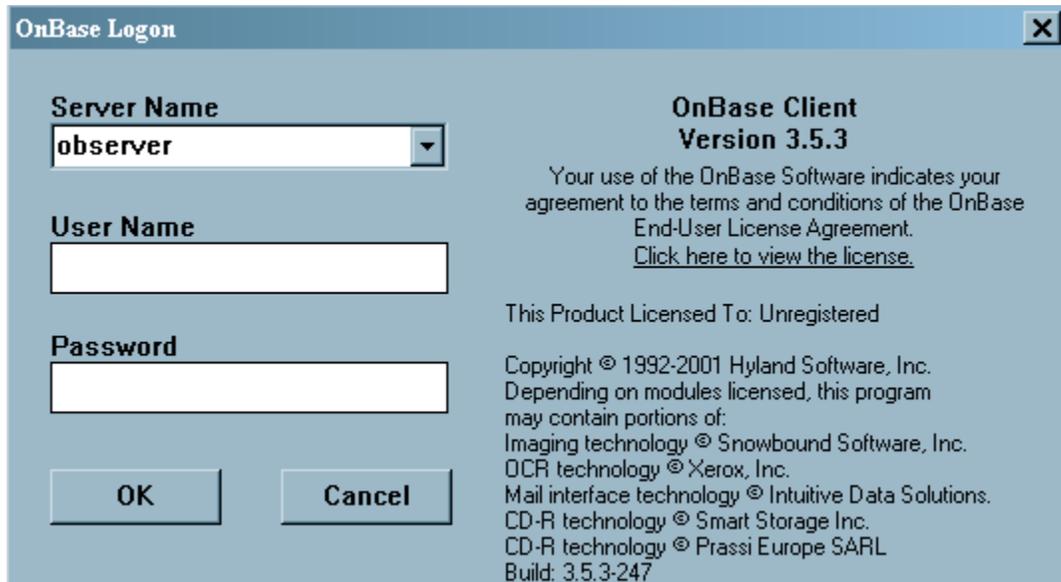
OnBase users will now be able to access documents via a Web Client. The new Web Client does not require software to be loaded onto the user's machine. With appropriate security clearance, any user within the PTC Network can view OnBase documents. This quick guide highlights the functional differences between the old OnBase Thick Client and the new OnBase Web Client.



## Logon

### *This Is The Way It Used To Work*

Click on the On-Base shortcut on the desktop or Citrix.

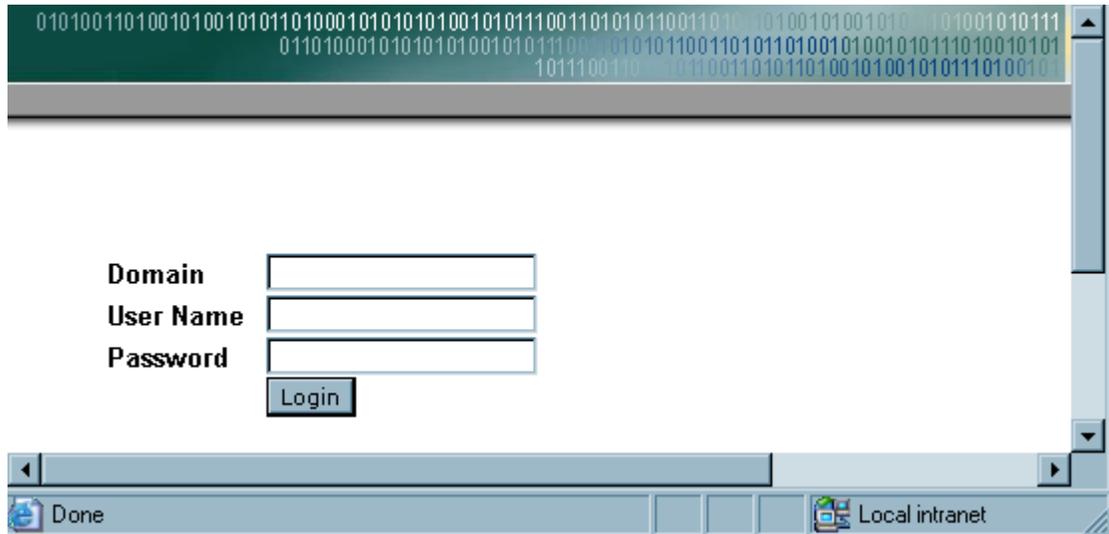


Enter the On-Base username and password.  
Click the OK button.

### *This Is How It Works Now*

Open The PTC Intranet.

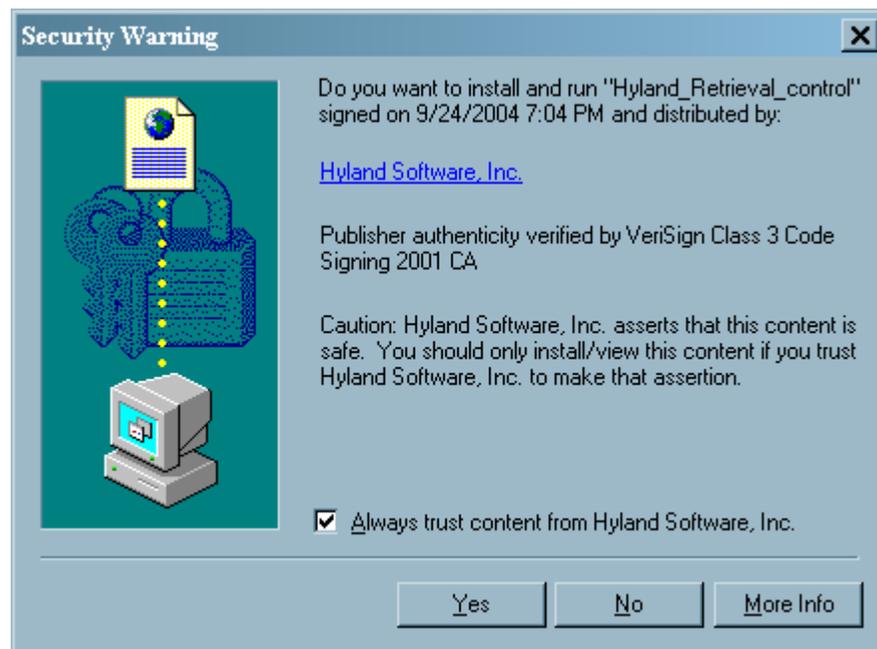
Click on the shortcut in PTC Web Applications to On-Base.



Enter the Domain – *PTC.LOCAL*

Enter your Windows user name and password.

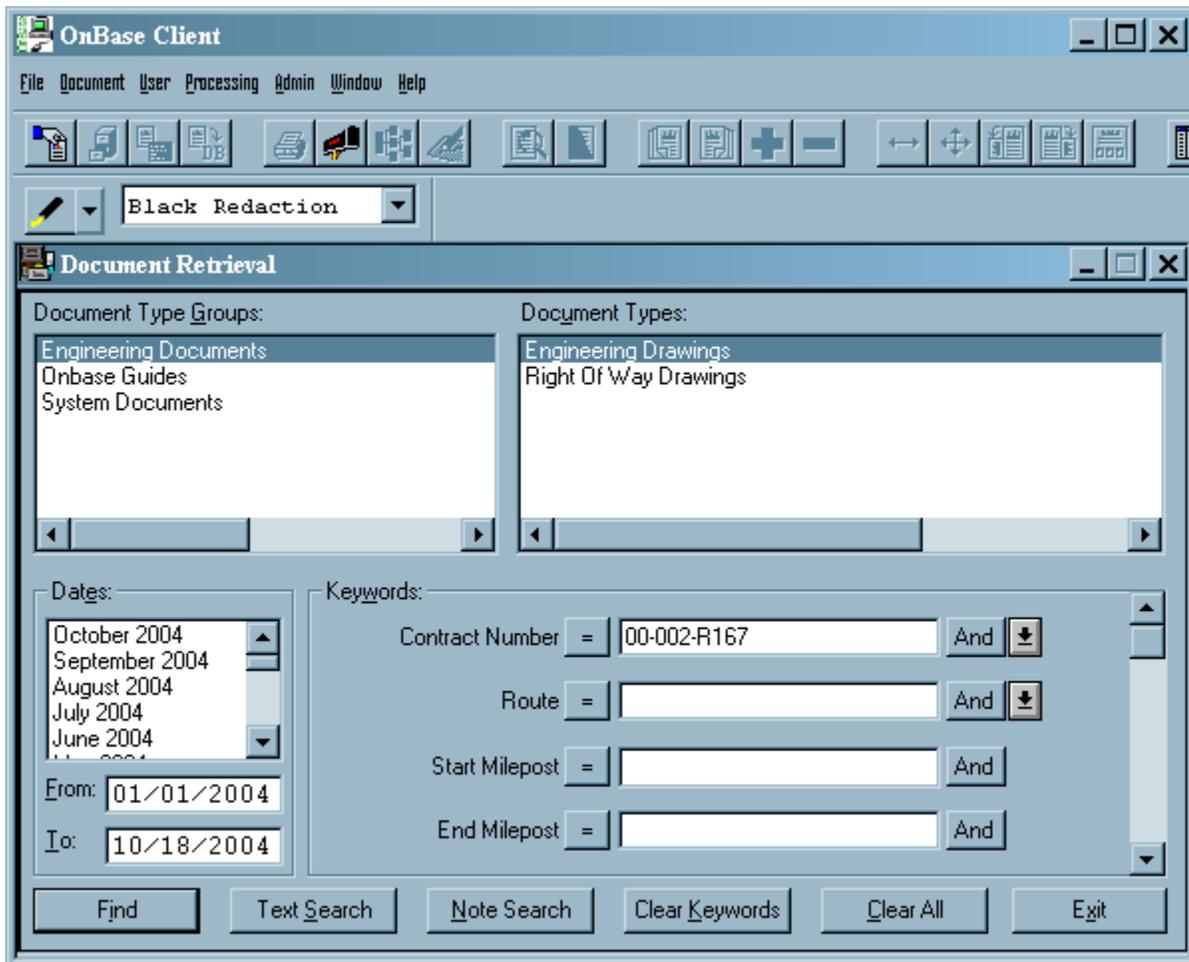
Click the Login button.



The first time you login to the OnBase Web Client you may receive a Security Warning. This warning is caused by the active X controls required by the Web Client. Click the checkbox beside *Always trust content from Hyland Software, Inc.* If you do not click this checkbox, you will receive this warning every time you use the OnBase Web Client. Click the *Yes* button to continue.

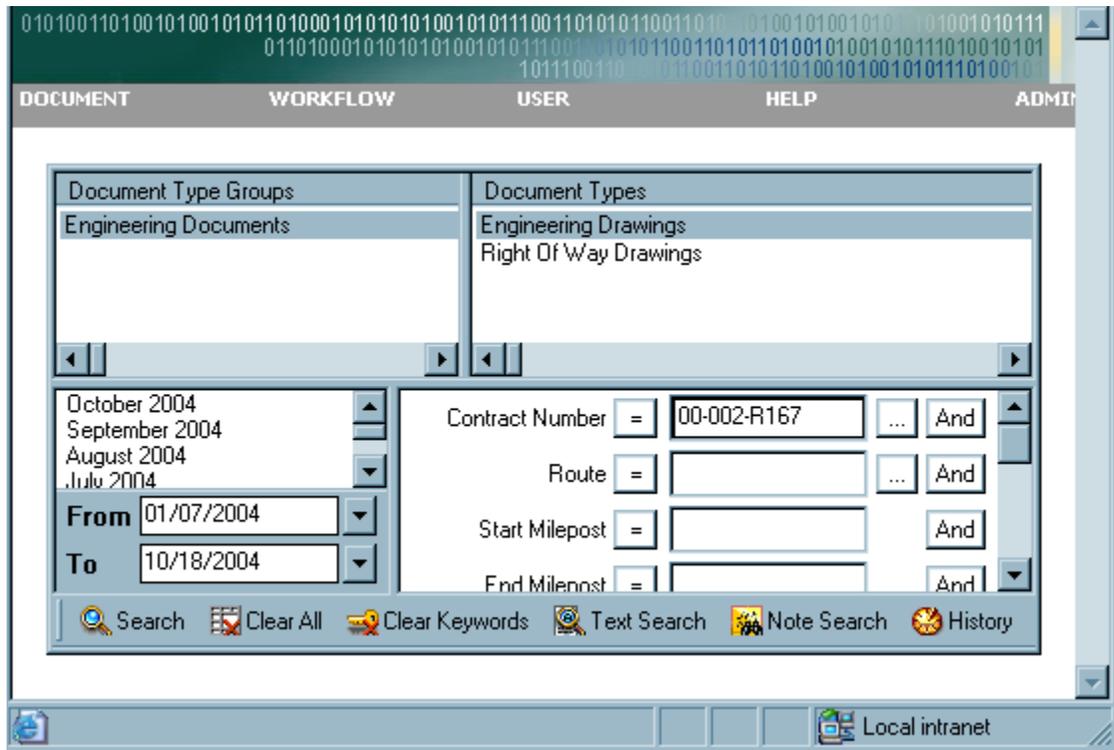
## Document Retrieval/Query

*This Is The Way It Used To Work*



- Click on the Document Type Group in the Document Type Groups window.
- Click on the Document Type in the Document Types window.
- Enter the dates in the From-To textboxes or select desired months(if necessary).
- Enter the Keyword Information (if necessary).
- Click Find.

*This Is How It Works Now*



\*If your OnBase Web Client window does not look similar to the image above, refer to the Adjusting The OnBase Web Client Window section.

Click on the Document Type Group in the Document Type Groups window.

Click on the Document Type in the Document Types window.

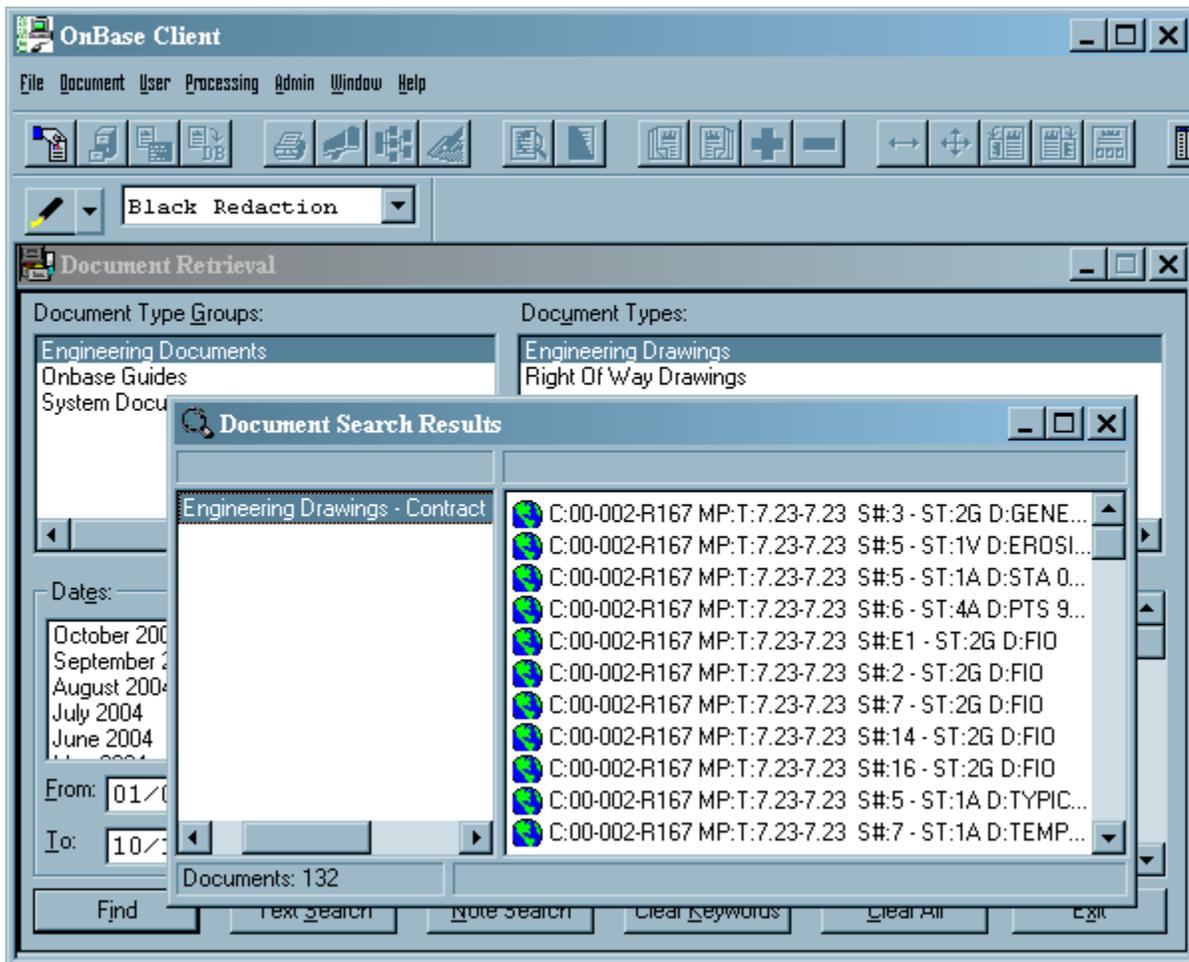
Enter the dates in the From-To textboxes or select desired months(if necessary).

Enter the Keyword Information (if necessary).

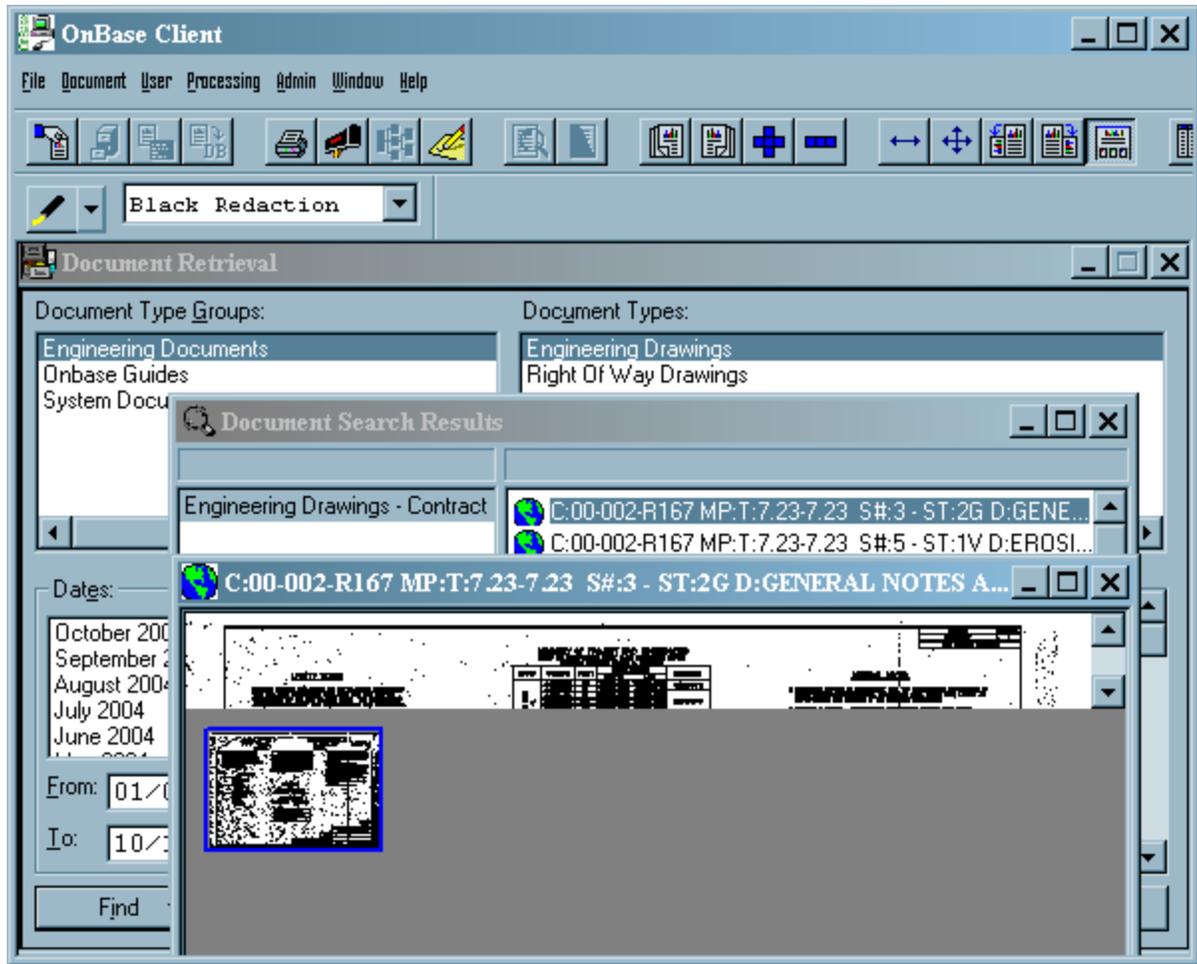
Click Search.

## Viewing Documents

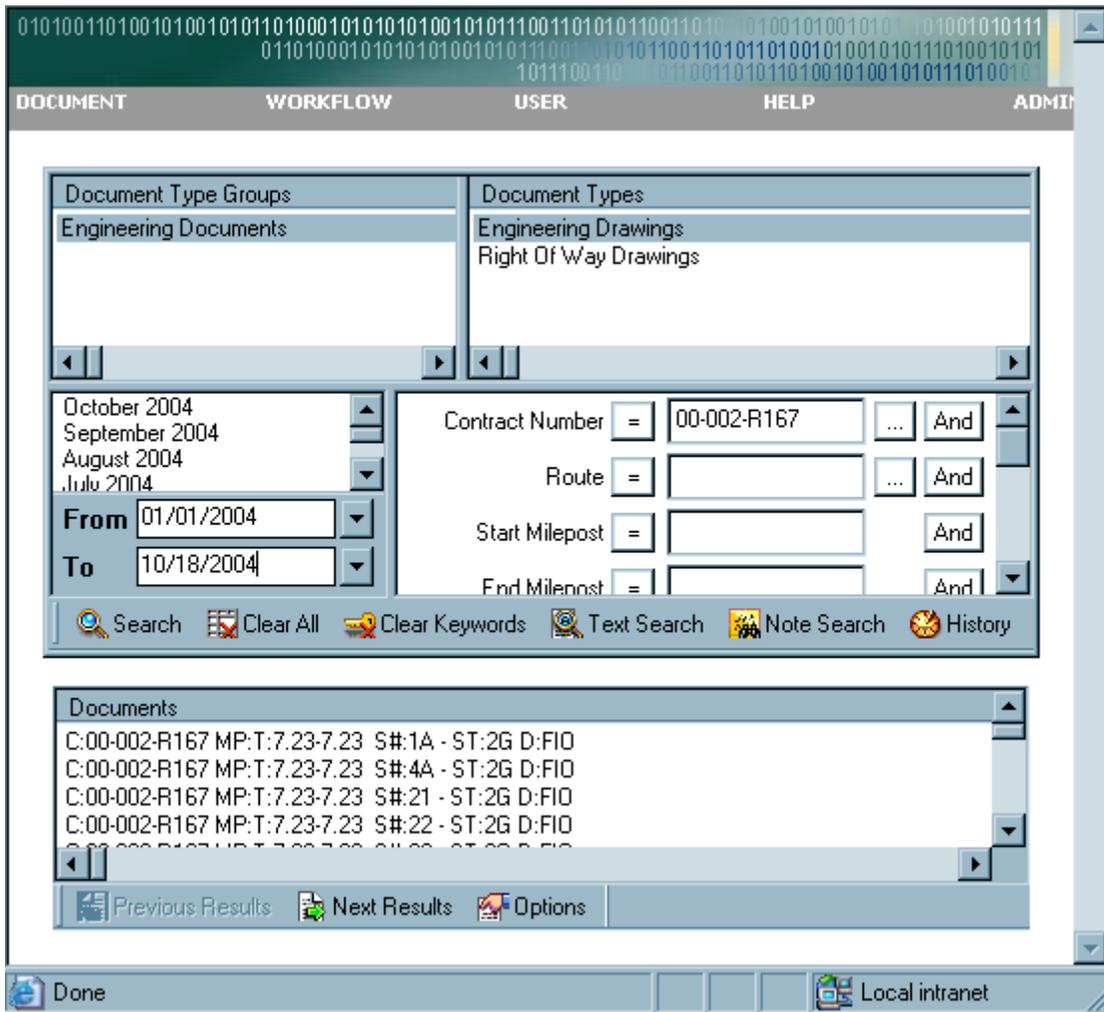
### *This Is How It Used To Work*



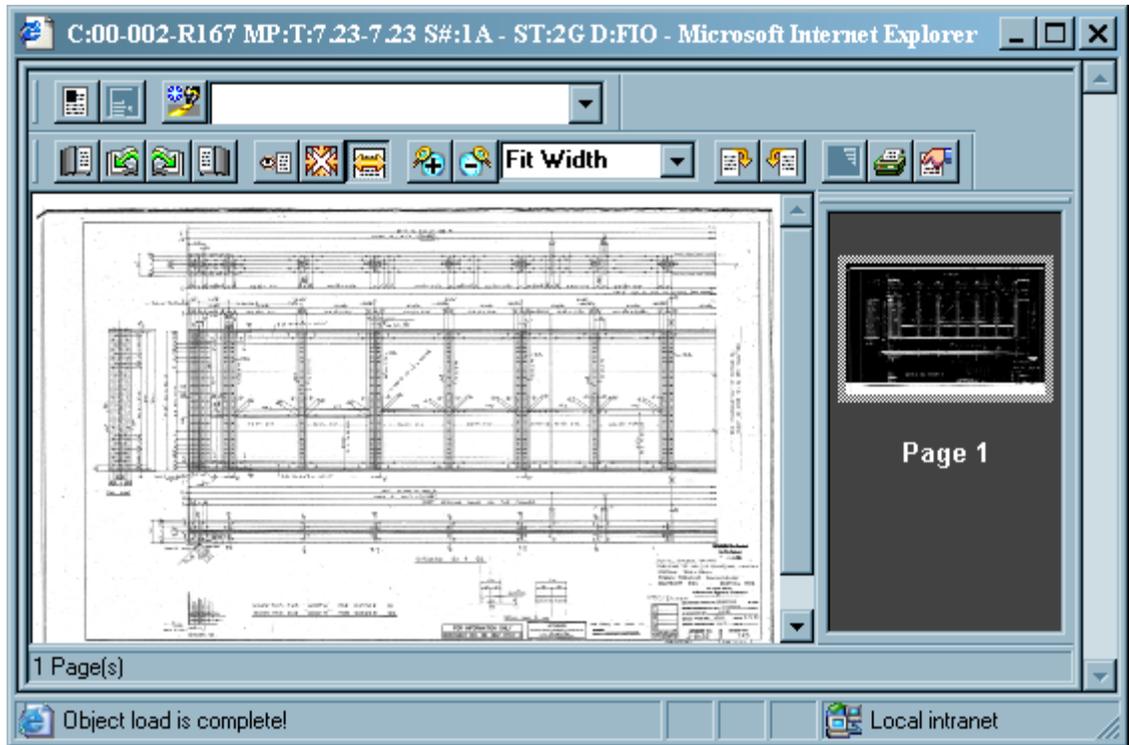
Double-click on the Document in the right pane to view.



*This Is How It Works Now*



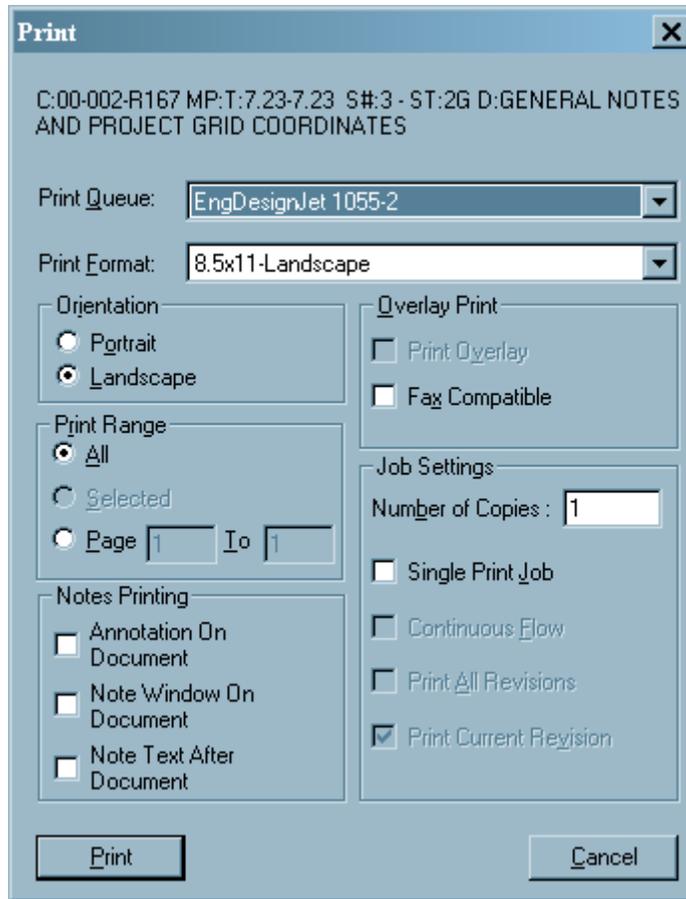
Double-click on the Document in the *Documents* pane.



## Printing Documents

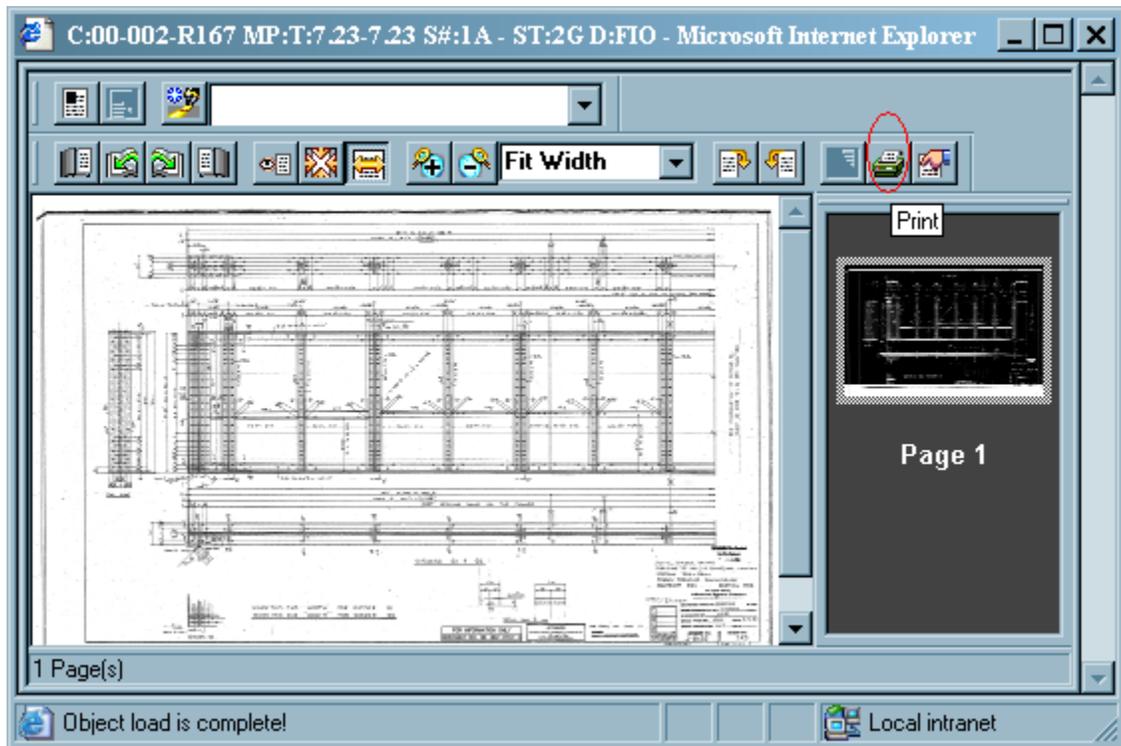
### *This Is How It Used To Work*

Select *Print* under the *File* Menu.

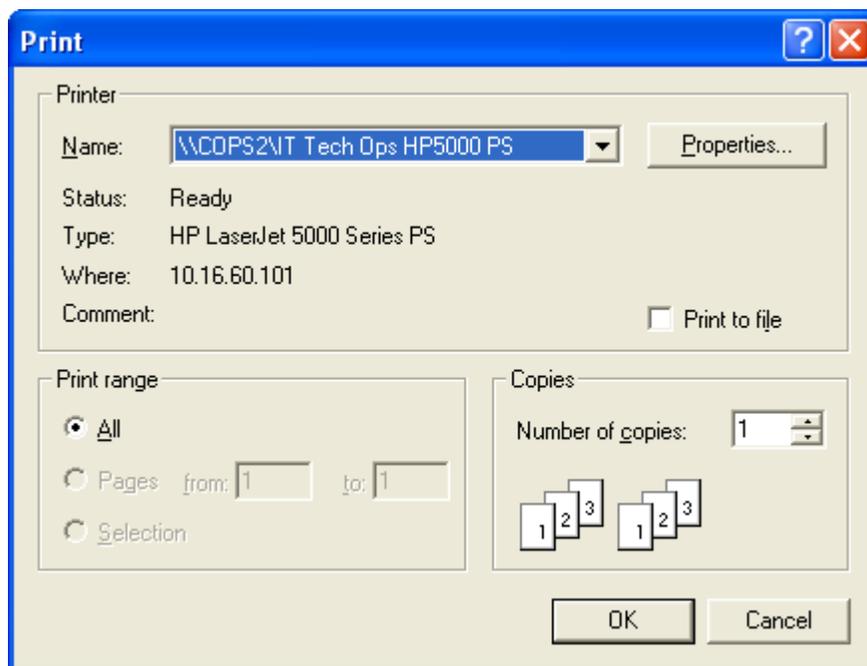


Select *Print Queue* and printing options.  
Click *Print* button.

*This Is How It Works Now*



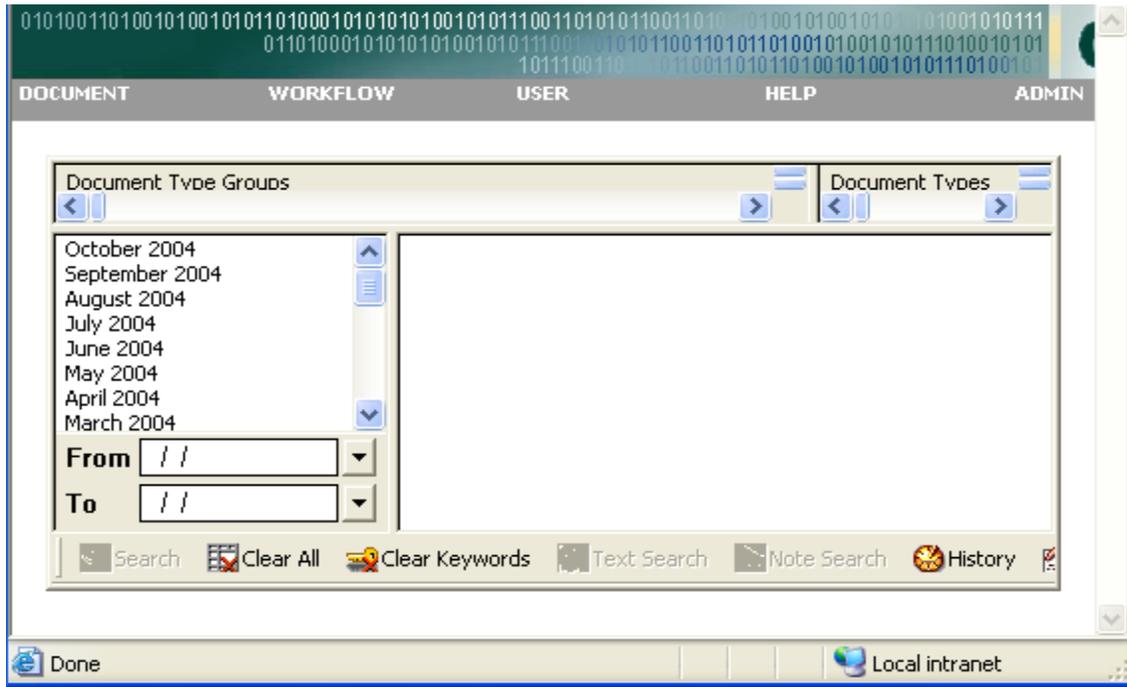
Click Print button (circled in red above).



Select printer.  
Click *OK* button.

## Adjusting The OnBase Web Client Window

The OnBase web client window size is based upon your computer's resolution setting. You can change the size of the panes in the web client by moving the dividing bars. Follow these steps, if your web client needs to be resized like the image below.



Move your cursor over the bar until it becomes a double-ended arrow as below. Click and hold the mouse button. Drag the bar to the desired location. Only the horizontal bar and the vertical bar between *Document Type Groups* and *Document Types* can be moved.

