

# **OnBase Client User Manual**

## **Quick Guide for Experienced Users**



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#### 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.

OnBase Logon	×
Server Name observer 🗸	OnBase Client Version 3.5.3
User Name	Your use of the OnBase Software indicates your agreement to the terms and conditions of the OnBase End-User License Agreement. <u>Click here to view the license.</u>
Password	This Product Licensed To: Unregistered Copyright © 1992-2001 Hyland Software, Inc. Depending on modules licensed, this program may contain portions of: Imaging technology © Snowbound Software, Inc.
OK Cancel	Mail interface technology © Aerox, inc. Mail interface technology © Intuitive Data Solutions. CD-R technology © Smart Storage Inc. CD-R technology © Prassi Europe SARL Build: 3.5.3-247

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



Open The PTC Intranet.

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

Domain User Name Password Login	01010011010010100101	0110100010101010100010101110011 01101000101010101010000101011100 10111	01010110011010 1010 01010110001101010 00110 01100110	0010100101010 0100101 11001010010101011101001 11010010	10111 <b>▲</b> 10101 10101
	Domain User Name Password				
					•

Enter the Domain – *PTC.LOCAL* Enter your Windows user name and password. Click the Login button.

Security Warning	×
<b>3</b>	Do you want to install and run "Hyland_Retrieval_control" signed on 9/24/2004 7:04 PM and distributed by:
	Hyland Software, Inc.
	Publisher authenticity verified by VeriSign Class 3 Code Signing 2001 CA
	Caution: Hyland Software, Inc. asserts that this content is safe. You should only install/view this content if you trust Hyland Software, Inc. to make that assertion.
	Always trust content from Hyland Software, Inc.
	<u>Yes</u> <u>No</u> <u>More Info</u>

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

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Find Text	Search Note Search Clear Keywords Clear All	E <u>x</u> it

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.



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	August 2004 Julo 2004		Route =		And	
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\*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

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September 2 August 2004	S:00-002-R167 MP:T:7.23-7.23 S#:2 - ST:2G D:FI0
July 2004	C:00-002-R167 MP:T:7.23-7.23 S#:7 - ST:2G D:FI0
June 2004	C:00-002-R167 MP:1:7.23-7.23 S#:14 - S1:2G D:FIU
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Documents: 132	U
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Double-click on the Document in the right pane to view.



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Document Type Groups	Document Types	
Engineering Documents	Engineering Drawings	
	Right Of Way Drawings	\$
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October 2004	Contract Number = 00	)-002-B167
August 2004		
July 2004	Route =	And
From 01/01/2004	Start Milepost 😑	And
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C:00-002-B167 MP:1:7.23-7.23 S	#(21 - ST(2G D)FIO #(22 - ST(2G D)FIO	_1
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Previous Results 🛛 😭 Next F	Results 🐼 Options	
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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.





Click Print button (circled in red above).

Print		? 🔀
Printer —		
<u>N</u> ame:	\\COPS2\IT Tech Ops HP5000 F	PS   Properties
Status:	Ready	
Туре:	HP LaserJet 5000 Series PS	
Where:	10.16.60.101	
Comment	:	Print to file
Print range		Copies
• <u>A</u> I		Number of <u>c</u> opies: 1
C Pages	s from: 1 to: 1	
C Selec	tion	
		OK Cancel

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.

0101001101001010010101	0110100010101010101001 0110100010101010	0101110011010101010 01010111001 1011100110	011010_01001010100101 1001101010101001010010 1100110101010010	0101010101111	
DOCUMENT	WORKFLOW	USER	HELP	ADMIN	
			> Docur	nent Types	
October 2004 September 2004 August 2004 July 2004					
June 2004 May 2004 April 2004 March 2004	•				
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🙆 Done			🧐 La	ocal intranet	:

Move your cursor over the bar until it becomes a double-ended arrow as below. Click and hold the left 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.

010100110100101001010	0110100010101010101001 0110100010101010	101011100110101011 10101011 101110011010	0011010 01001010 11001101011010010 -01100110101010	01010 100101011101001010 10100101010101	1
DOCUMENT	WORKFLOW	USER	HELP	A	DMIN
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