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 tabbed interface provides a point-and-click environment for fast and simple navigation.

Logging On and Logging Off

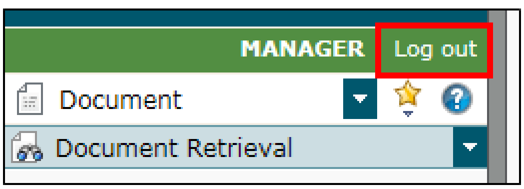
To log on to the Web Client:

1. Access the Web Client logon Web site.
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 displays.

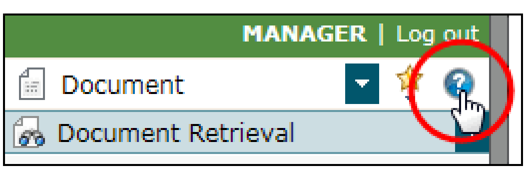
To log off of the Web Client:

1. Click **Log out**:



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** button on your keyboard, or by clicking the **Help** button:

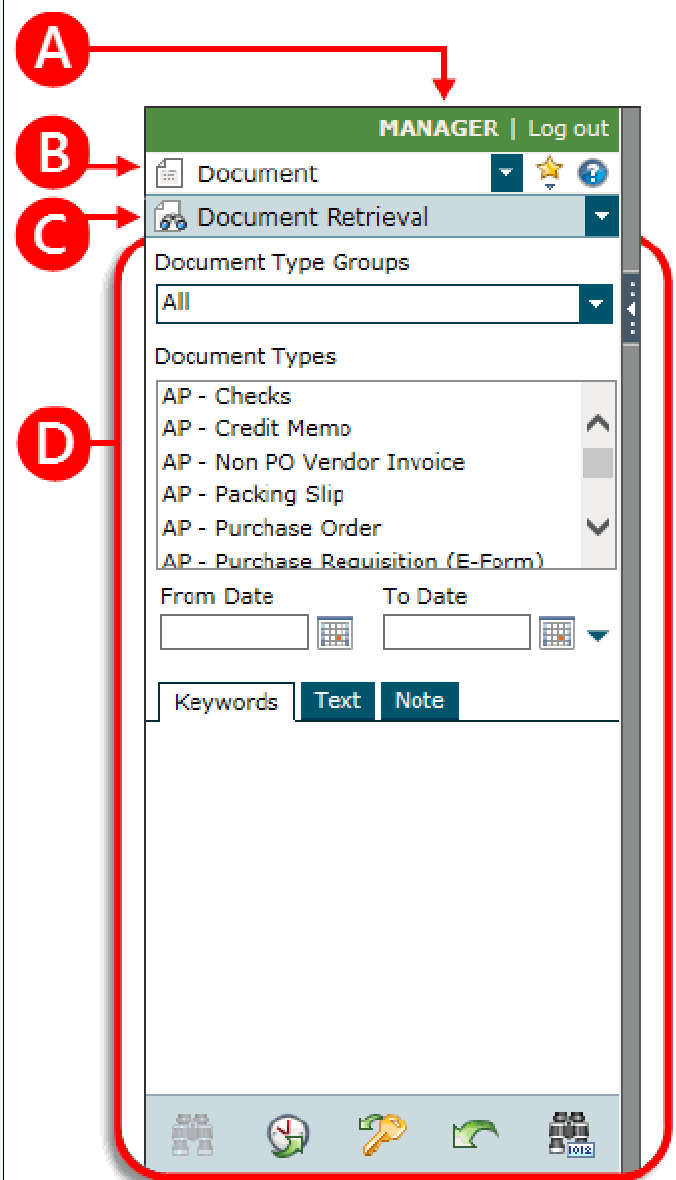


The help files are opened in a separate window. To open the Web Client help, click **Web Client** from the navigation pane on the left side of the new window.

You can also open help files for different OnBase modules. Simply click the name of the module you wish to view help for.

Navigating the Web Client

The **Navigation Panel** allows you to access the various modules and contexts available to you in the Web Client.



A **User Name:** Displays the user name of the currently logged on user.

B **Context selection menu:** Click to navigate to a different Context.

C **Mode selection menu:** Click to navigate to a different Mode.

D **Panel:** The panel changes based on the actively selected Mode.

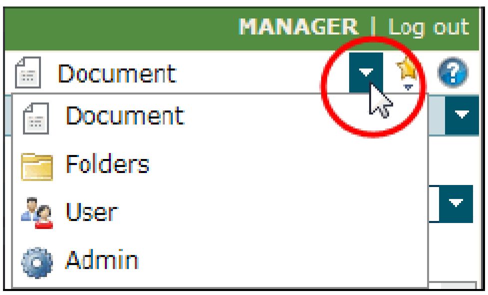
Switching Between Contexts and Modes

The Web Client **Context** and **Mode** drop-down menus provide a set list of context and mode views that enable you to start document retrieval, change your password and preference settings, and access help information, for example.

You can switch between the Web Client's different contexts and modes from the **Navigation Panel**. The contexts and modes that are available are determined by your system administrator.

To switch to a different context (e.g., Folders):

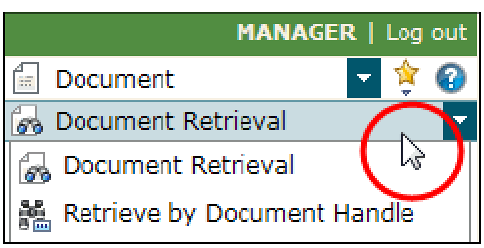
1. Click the **Context** drop-down select menu:



2. Select a different context by clicking it in the list.

To switch to a different mode (e.g., Document Retrieval mode):

1. Click the **Mode** drop-down select menu, located beneath the context menu:

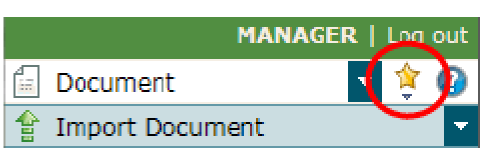


2. Select a different mode by clicking it in the list.

Adding Favorites

You can add the currently displayed context to your list of favorites by performing the following steps:

1. Click the **Favorites** button:



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

   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.

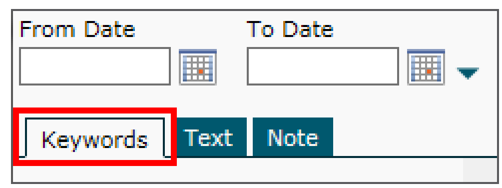
To access Document Retrieval mode:

1. Click the Context drop-down select list and select **Document**.
2. Click the Mode drop-down select list and select **Document Retrieval**.
3. Select a **Document Type Group**.

   Select a **Document Type**.

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

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



   A list of keyword fields displays below.

6. 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.

7. When you have entered all search criteria, click the **Find** button at the bottom of the panel:

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

8. Double-click a document from the list to open it. The document you selected displays in the area below the list.

Importing Documents

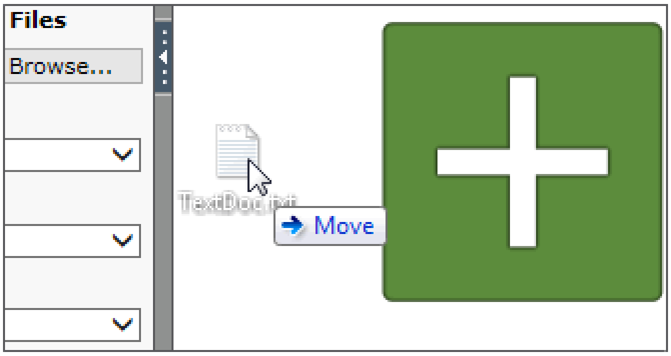
To import documents in the Web Client:

1. Click the Context drop-down select list and select **Document**.
2. Click the Mode drop-down select list and select **Import Document**.

Importing Documents (Continued)

The indexing panel displays below the context and mode menus.

3. 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 white space next to the indexing panel:

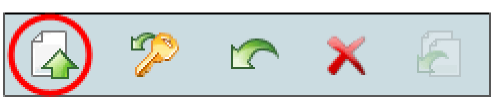


A green plus icon will display in the white space indicating that the file can be dropped here for import.

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

4. Select a **Document Type Group** for the document.

   Select a **Document Type** for the document.
5. Enter all of the necessary keyword values in each field.
6. When you are finished entering the necessary keyword values, click the **Import** button to import the document into OnBase:



When the document is finished importing, the status **Imported Successfully** will display.

Batch Indexing

To index a batch of documents in the Web Client:

1. Click the Context drop-down select list and select **Document**.
2. Click the Mode drop-down select list and select **Indexing.**

   The Indexing panel displays below the context and mode menus.
3. Under **Batch Status**, click the drop-down select list and select a queue.

   A list of available queues displays to the right.
4. Right-click on 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.

Batch Indexing (Continued)

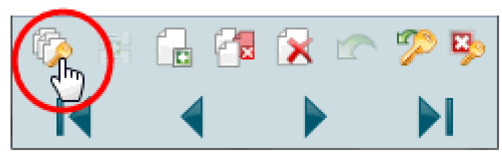
5. In the indexing panel, select a **Document Type** for the document.

   A list of keyword fields displays below.
6. 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:

7. 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**.