

Quick Reference Guide

Cross Reference Document Types

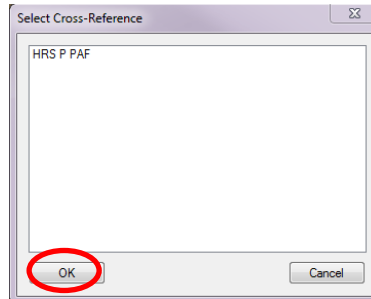
Cross referencing document types allows users the ability to quickly and easily view associated documents in the OnBase system. Note: If the user has access to one document type, but not the other, the cross reference will not retrieve any documents.

It is recommended to first make sure you have added the View Cross-Reference button to your toolbar. For help with adding buttons, see Quick Reference Guide – Customize Toolbars.

This functionality is available in the Full client, Unity client, and Web client.

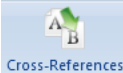
In Full Client:

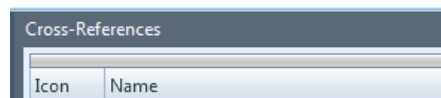
1. With the document open, click the  button on your toolbar. Note: If the document displayed is an image, you can also double click the image.



2. Highlight the document type you wish to display and click **OK**. If there are multiple documents cross-referenced, a list will be displayed. Choose a document by double-clicking on the document name.

In Unity Client:

1. With the document open, click the  Cross-References button on your toolbar. Note: If the document displayed is an image, you can also double click the image.
2. A panel will display on the right showing a list of all documents cross referenced with the document currently open.



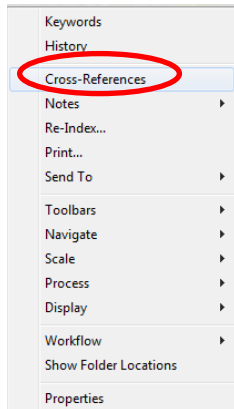
3. Double-click the document you wish to display.

In Web Client (Image Files)

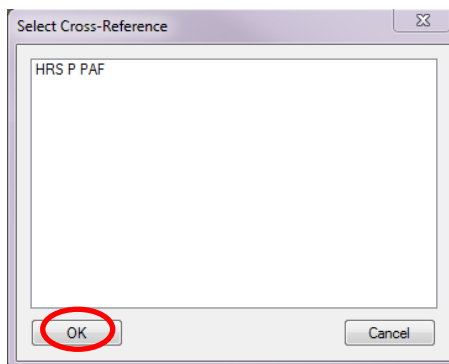
1. If the document is an **image**, double-click on the image to display a list of cross-referenced documents

OR

Right-click on the image and select **Cross-References**



A Select Cross-Reference window will pop-up. Select the Cross-Reference document type and click **OK**.



2. Double-click the document you wish to display.

In Web Client (PDF or Office file formats)

1. If the document is a PDF or Office file format, click on **Document > Cross-References** and select a document from the list (if there is only one, it will automatically be displayed).

