

# ONBASE SECURITY PRIVILEGE OPTIONS DEFINED

<i>Documents</i>	<i>Description</i>
<b>Retrieve/View</b>	<p>Allows the user to retrieve and view documents from any search results list or batch. Users can retrieve documents from envelopes without this privilege, but cannot access Keyword Values.</p> <p><b>Note:</b> If users have rights to the Registered Processing Products but do not have access to SYS Verification Reports, they can still read Verification Reports from the batch in the Awaiting Commit Queue right-click menu. Users would be unable to view the report from inside the batch or from a retrieval method.</p> <p><b>Caution:</b> Web Client Users in Document Retrieval mode will be able to see the list of documents in a Document Search Results list, including any Auto-Name Keyword Values, even if this privilege is not granted for the User Group. They will not be able to open the documents unless this privilege is granted.</p>
<b>Create</b>	<p>Allows the user to create new documents, forms, document templates, and physical record locators by selecting File   New in the OnBase Client.</p> <p>Users with Create and Import privileges can create documents using the drag and drop import method.</p> <p>Users with Create and Copy to Clipboard / Save As privileges can use the Send To   Create New Document option to create documents from an existing document.</p> <p>If your configuration will be used by a Web Server, the Create privilege is required in order to scan documents or import documents in a Web Client.</p> <p><b>Note:</b> This privilege is required for users who will need to create documents using EDM Services document templates.</p>
<b>Modify</b>	<p>Allows for the modification of documents, including adding or deleting pages and creating redactions.</p>
<b>Save Rotation</b>	<p>Allows the user to save the rotation that has been placed on a displayed image.</p>
<b>Delete</b>	<p>Gives the user the privilege to delete documents.</p> <p>You must have the Delete privilege for the following functions:</p> <ul style="list-style-type: none"> <li>• Delete a page from a single paged document</li> <li>• Rights to the Trash Can</li> <li>• Delete copied page from original document option when creating a new document from a page from an existing document</li> </ul> <p><b>Note:</b> Users without document deletion rights can delete documents that reside in an envelope. Those documents are deleted only from the envelopes, not from OnBase.</p> <p><b>Note:</b> This privilege does not apply to scanned documents in a batch that have not been indexed (assigned to a Document Type). These documents can be deleted by anyone.</p>
<b>Print</b>	<p>Gives the user access to print capabilities.</p>
<b>External Mail</b>	<p>Allows e-mail to be sent outside of the users in the database.</p>

<i>Documents</i>	<i>Description</i>
<b>Internal Mail</b>	<p>Allows users to create internal mail messages.</p> <p><b>Note:</b> Without this privilege, users can still read internal mail and reply to internal mail messages.</p>
<b>Re-Index</b>	<p>Allows the user to change the Document Type and/or Keyword Values indexed for a document.</p> <p><b>Note:</b> You must also have the Modify Keyword privilege in order to modify Keyword Values while re-indexing.</p>
<b>Modify Keywords</b>	<p>Allows the user to view and change Keyword Values. The <b>View Keywords</b> option is automatically selected and cannot be unchecked. If disabled, the Keyword Values in the <b>Add/Modify Keyword</b> dialog box cannot be changed from any related application.</p> <p><b>Note:</b> If this document is checked out by another user, the Keyword Values will not be able to be modified regardless of privileges.</p>
<b>View Keywords</b>	<p>Allows the user to view and change Keyword Values. The <b>View Keywords</b> option is automatically selected and cannot be unchecked. If disabled, the Keyword Values in the <b>Add/Modify Keyword</b> dialog box cannot be changed from any related application.</p>
<b>Access Restricted Keywords</b>	<p>Allows access to any read-only or hidden Keyword Values.</p>
<b>View History</b>	<p>Allows users to view the history of all actions performed on individual documents.</p> <p><b>Caution:</b> Document History should be restricted if sensitive information about documents will be recorded.</p>
<b>Copy to Clipboard/Save As</b>	<p>Allows a section of a text document to be copied (Copy to Clipboard) and entire documents to be saved to an external file (Save As). For image documents, part of the image or all of the image may be saved into another file.</p> <p>Also allows users who have the <b>Create</b> privilege for a Document Type to use the <b>Send To   Create New Document</b> option to create new documents of that Document Type.</p>

**Note:** In order for a user to access the Delete/Reorder Pages right-click option, one of the following privileges must be granted: Modify, Delete, or Save Rotation. If none of these privileges are granted, a View Thumbnails Only option will be available in its place.

<i>Client Features</i>	<i>Description</i>
<b>Retrieval Dialog</b>	Allows access to the <b>Document Retrieval</b> dialog box and its functionality.
<b>Import</b>	Enables the user to import documents via the <b>Import</b> dialog box. In the Desktop and Web Client, users must also have the <b>Create</b> privilege in order to import documents.
<b>Envelopes</b>	Enables the user to perform all functions associated with an envelope ( <b>Create, View, Export</b> ).  <b>Note:</b> Export rights are also required if an envelope is to be exported.
<b>Envelope Sharing</b>	Click the <b>Sharing</b> check box in order to give the selected User Group full rights to envelopes. This allows users within this User Group to share the envelope with other users.
<b>User / Workstation Options</b>	Allows access to the <b>User Options</b> dialog box and the Workstation Options dialog box.
<b>Enable Markup Toolbar</b>	Enables the <b>Markup Toolbar</b> option in the OnBase desktop. You must be licensed for the EDM Services module in order to use the Markup Toolbar.
<b>Thumbnail Hit List Results Viewer</b>	Enables the <b>Thumbnail Viewer</b> feature in the OnBase Client and Web Client. This option allows a user to preview thumbnail-sized images of Image documents from a Document Search Results list.  <b>Note:</b> The Thumbnail Viewer is only applicable for image documents.
<b>Toolbar Config</b>	Determines whether a user can customize the OnBase Toolbar Buttons in their system menu. ( <b>User   Toolbars   Customize Toolbar</b> ).
<b>External Text Search</b>	Enables the Text Search button on the Document Retrieval dialog box and Custom Queries which are configured to have the button. This privilege is selected by default for each user group.  <b>Note:</b> This privilege does not affect Internal Text Search.

<i>Folders</i>	<i>Description</i>
<b>Retrieve / View</b>	Allows users to retrieve and view folders and documents within the File Cabinets window.
<b>Create</b>	Allows users to create folders in a file cabinet.  <b>Note:</b> If a user creates a document in an auto-folding Document Type, an auto-folder is created regardless of the user's privileges to create folders.
<b>Modify Keywords</b>	Allows users to view/add/modify/delete Keyword Values on folders.
<b>Modify Folder Contents Keywords</b>	Allows users to modify Keyword Values on child folders and documents using the <b>Folder Contents   Keywords</b> right-click options. Users must also have the <b>Modify Keywords</b> privilege for the current folder to use <b>Folder Contents   Keywords</b> options.  This privilege allows users to modify Keyword Values on only the child folders and documents that the user has privileges to both view and modify Keyword Values on. If the user lacks either privilege on a child folder, then the user cannot modify Keyword Values on the child folder or its documents using the <b>Folder Contents   Keywords</b> options. Similarly, if a user lacks privileges to view or modify Keyword Values on documents within a folder, then the user cannot modify Keyword Values on those documents using the <b>Folder Contents   Keywords</b> options.  <b>Note:</b> <b>Folder Contents   Keywords</b> options are available from the OnBase Client only.
<b>Copy</b>	Allows users to copy folders configured as copyable. No Keyword Values are updated on copied folders.
<b>Move</b>	Allows users to move folders configured as movable. When a folder is moved, Keyword Values on the folder and its contents are updated according to the Keyword Value Update Rules for Moved Folders, which are available in the Folder Configuration help. To preserve accuracy, Keyword Values are updated regardless of a user's privileges to view and modify Keyword Values on the folder and its contents.
<b>Delete</b>	Allows users to delete folders from a file cabinet and send them to Folder Maintenance.
<b>Add Documents</b>	Allows users to add documents to static and static/dynamic folders.
<b>Remove Documents</b>	Allows users to remove documents statically residing in a folder.  <b>Caution:</b> Even without the <b>Remove Documents</b> folder privilege, users who have the <b>Delete</b> document privilege can send documents in folders to Document Maintenance.
<b>View History</b>	Allows users to view all actions performed on individual folders. The Folder History window is accessible from the OnBase Client, Web Client, Unity Client, and Desktop. It is unavailable in the Java Web Client.  <b>Caution:</b> This privilege should be restricted if sensitive information about folders will be recorded.

<i>Scan/Index Batches</i>	<i>Description</i>
<b>Index Scanned Documents</b>	Enables indexing functions in the Awaiting Index Queue of the Document Imaging window. Privileges to the associated Scan Queue are also required.
<b>Commit Scanned Batches</b>	Allows user to commit batches of documents that have been scanned into OnBase.
<b>Purge Scanned Batches</b>	Allows the user to purge batches of uncommitted documents that have been scanned into OnBase.
<b>Purge Committed Scanned Batches</b>	Allows the user to purge batches of committed documents that have been scanned into OnBase.
<b>Change Batch Scan Queue</b>	Allows the user to re-assign a batch of scanned documents from one scan queue to another.
<b>Rename Scanned Batches</b>	Allows the user to rename batches of scanned documents.

**Note:** The Commit Scanned Batches, Purge Scanned Batches, Purge Committed Scanned Batches, Change Batch Status Queue and Rename Scanned Batches options are enabled automatically for users with the Document Imaging Administrative Privilege.