# OnBase ENVELOPES - QUICK REFERENCE GUIDE

USING ENVELOPES — FYI

- OnBase envelopes are a way to group documents together for easy access and sharing

- Envelopes can be accessed from the Web Client, Unity Client and from Outlook with OnBase Integration

- Documents sent to an envelope do not require common keywords or characteristics

- You cannot search for envelopes based on keywords

- A document in an envelope is actually just a pointer to the document so deleting a document from an envelope will not delete the document from OnBase. Likewise, adding a document does not create a copy or duplicates

- There is no limit to the number of documents that can be placed in an envelope

To view envelopes, click on **Envelopes** under the **Documents Group** on the main ribbon.
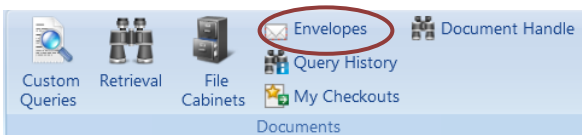

Under the **Envelopes Tab** you will see envelopes you have created or have been shared with you
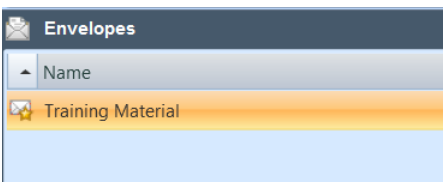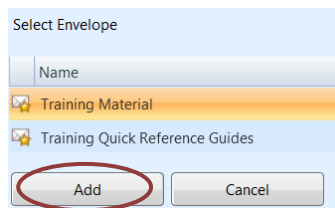

CREATE AN ENVELOPE

To create an envelope:

1. Click on **Envelopes** under the **Document Group** on the main ribbon

2. Click on the Envelopes Tab and select **Create Envelope** or right click in the Envelopes pane and select **Create Envelopes**

3. Enter a name for the new envelope in the text field and select **OK**
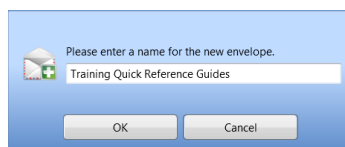
To send documents to an envelope:

1. Search and retrieve the documents you would like to add to an envelope

2. **Right click** on the document and select **Send To | Envelope**. CTRL + Click will also allow you to select multiple documents

3. Select the envelope you would like to add the documents to and click **Add**

4. You will receive a notification from OnBase that documents have been added to the envelope successfully

SHARE AN ENVELOPE

To share an envelope:

1. Click on **Envelopes** under the **Document Group** on the main ribbon

2. Select the envelope you want to share

3. Under the **Envelopes Tab** select **Share Envelope**

4. A list of available users will appear. Click on the **green arrow** ▶ to add users. Envelopes respect OnBase security so users will only have access to documents they have permissions to view

5. Once a user is selected, identify what permissions you are granting to the envelope and select **OK**
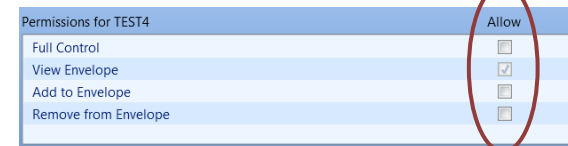
- **Full Control** - allows the user to share the envelope, add documents, remove documents and delete the envelope.

- **View Envelope** - allows the selected user to view

- **Add to Envelope** - allows the user to add documents to the envelope

- **Remove from Envelope** - allows the user to remove documents from the envelope