OnBase - Envelopes

OnBase has a feature called 'Envelopes' which allows users to collect documents ad hoc. When you create and populate an Envelope, you are basically creating a list of pointers to documents that you are collecting.

If you have an upcoming meeting and you're working on gathering documents, for example, an Envelope would be an excellent way to do this. You can gather your documents throughout the week and have them ready-to-go by your meeting time.

You can, at any time, remove documents from your Envelope and you can even delete the entire Envelope. Neither of these actions will delete the document from OnBase.

Further, you can share your envelope with others so that they can add to your list of documents.

Creating an Envelope

1. User > Envelope > New Envelope

2. Give your Envelope a name. Make it descriptive so that if you're sharing with others, they'll know what it is

3. Click on OK

Accessing an Envelope

1. User > Envelope > Open Envelope

2. Double-click on the Envelope

Sharing an Envelope

1. User > Envelope > Open Envelope

2. Click on your Envelope

3. Right-click on the Envelope and choose Envelope Sharing

4. You'll see the below window that lets you choose specific OnBase users. Select your users one-at-a-time and move them over to the left-hand side of the window.

5. Click on Done.

Printing documents in an Envelope

- User > Envelope > Open Envelope
- Double-click on the Envelope
- Go to the documents, right-click, and choose Print

Deleting an entire Envelope
Removing a single document from an Envelope

- User > Envelope > Open Envelope
- Double-click on the pertinent Envelope
- You will see the list of documents that have been gathered in your Envelope. Click on the one you’d like to remove.
- Click on Remove

For further information, please see the OnBase at Carleton home page.