

Document and Folder History

Valuable information about any document in the OnBase system can be obtained through document and folder history reports. History reports detail the following about a document or folder:

- The date and time the document or folder was viewed.
- The user who viewed the document or folder.
- The action taken upon the document or folder, such as “Viewed Document” or “Delete Keyword.”
- Details of the action, such as the keyword deleted.

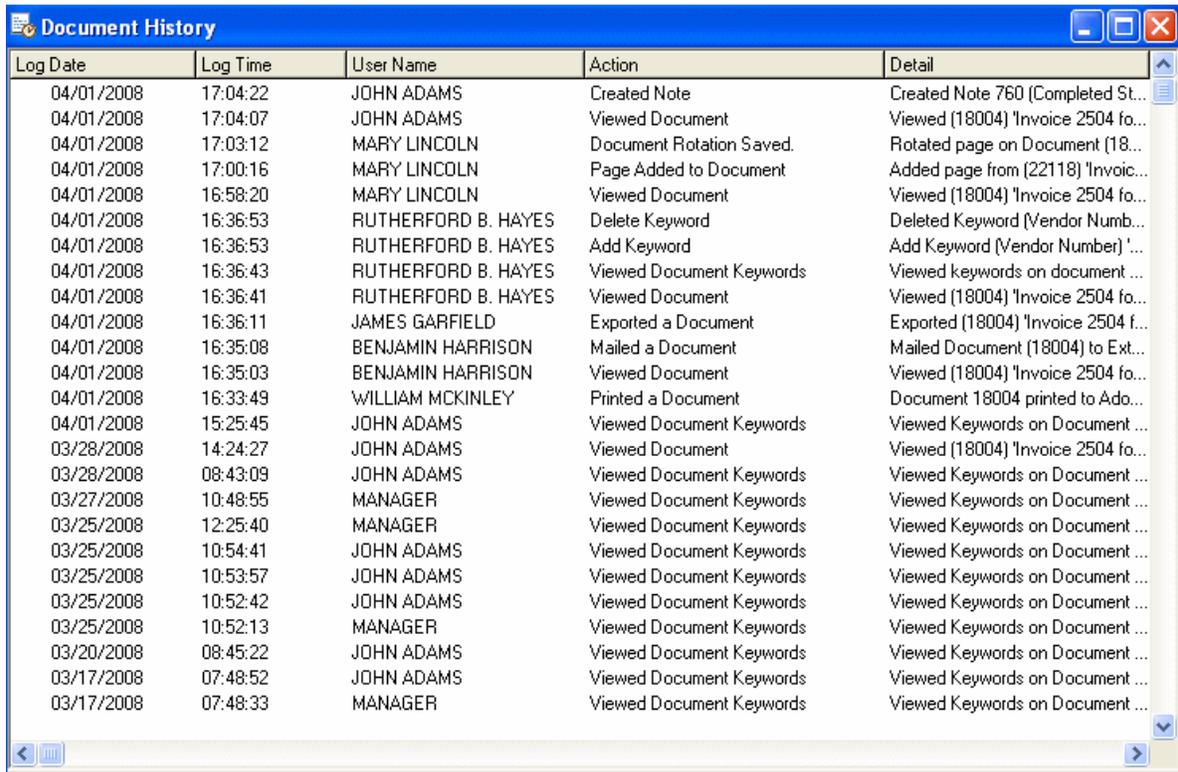
The document or folder history can be either viewed as needed or stored in the system as a report.

Viewing a Document's History

A document’s history is a log maintained by OnBase of all the actions performed on the selected document. If you have the appropriate administrative rights, you can view a history of the document that is currently open in the Document Viewer or displayed in the Document Search Results list. You cannot change any of the information in a document’s history.

To view the history of an open document or a document in the Document Search Results list, right-click and select **History**.

The **Document History** window lists the past actions performed on the document. By default, the entries are sorted in descending order, with recent actions listed first.



Log Date	Log Time	User Name	Action	Detail
04/01/2008	17:04:22	JOHN ADAMS	Created Note	Created Note 760 (Completed St...
04/01/2008	17:04:07	JOHN ADAMS	Viewed Document	Viewed (18004) 'Invoice 2504 fo...
04/01/2008	17:03:12	MARY LINCOLN	Document Rotation Saved.	Rotated page on Document (18...
04/01/2008	17:00:16	MARY LINCOLN	Page Added to Document	Added page from (22118) 'Invoic...
04/01/2008	16:58:20	MARY LINCOLN	Viewed Document	Viewed (18004) 'Invoice 2504 fo...
04/01/2008	16:36:53	RUTHERFORD B. HAYES	Delete Keyword	Deleted Keyword (Vendor Numb...
04/01/2008	16:36:53	RUTHERFORD B. HAYES	Add Keyword	Add Keyword (Vendor Number) '...
04/01/2008	16:36:43	RUTHERFORD B. HAYES	Viewed Document Keywords	Viewed keywords on document ...
04/01/2008	16:36:41	RUTHERFORD B. HAYES	Viewed Document	Viewed (18004) 'Invoice 2504 fo...
04/01/2008	16:36:11	JAMES GARFIELD	Exported a Document	Exported (18004) 'Invoice 2504 f...
04/01/2008	16:35:08	BENJAMIN HARRISON	Mailed a Document	Mailed Document (18004) to Ext...
04/01/2008	16:35:03	BENJAMIN HARRISON	Viewed Document	Viewed (18004) 'Invoice 2504 fo...
04/01/2008	16:33:49	WILLIAM MCKINLEY	Printed a Document	Document 18004 printed to Ado...
04/01/2008	15:25:45	JOHN ADAMS	Viewed Document Keywords	Viewed Keywords on Document ...
03/28/2008	14:24:27	JOHN ADAMS	Viewed Document	Viewed (18004) 'Invoice 2504 fo...
03/28/2008	08:43:09	JOHN ADAMS	Viewed Document Keywords	Viewed Keywords on Document ...
03/27/2008	10:48:55	MANAGER	Viewed Document Keywords	Viewed Keywords on Document ...
03/25/2008	12:25:40	MANAGER	Viewed Document Keywords	Viewed Keywords on Document ...
03/25/2008	10:54:41	JOHN ADAMS	Viewed Document Keywords	Viewed Keywords on Document ...
03/25/2008	10:53:57	JOHN ADAMS	Viewed Document Keywords	Viewed Keywords on Document ...
03/25/2008	10:52:42	JOHN ADAMS	Viewed Document Keywords	Viewed Keywords on Document ...
03/25/2008	10:52:13	MANAGER	Viewed Document Keywords	Viewed Keywords on Document ...
03/20/2008	08:45:22	JOHN ADAMS	Viewed Document Keywords	Viewed Keywords on Document ...
03/17/2008	07:48:52	JOHN ADAMS	Viewed Document Keywords	Viewed Keywords on Document ...
03/17/2008	07:48:33	MANAGER	Viewed Document Keywords	Viewed Keywords on Document ...

The Document History window displays actions in the following columns:

- **Log Date**

Lists the date when the action was performed. The date is formatted to correspond with the Windows Short Date format. This configuration can be found in Start | Control Panel | Regional and Language Options | Regional Options tab.

- **Log Time**

Lists the time when the action was performed. This time is based on the time of the database server.

- **User Name**

Lists the person logged on when the action was performed

- **Action**

Lists the action performed. Actions that can be logged depend on the modules your solution is licensed for. They include, but are not limited to:

- Viewing/creating/deleting a document
- Creating a document from an existing document
- Creating a revision/redaction
- Checking out/in a document
- Undoing a check out
- Printing a document
- Exporting/saving a document externally
- Sending a document through internal mail or external mail
- Saving a document's rotation
- Adding/deleting a page
- Copying pages to a new document
- Copying content from text/image documents to the clipboard
- Creating/modifying/viewing/deleting a note
- Viewing document Keyword Values
- Adding/modifying/deleting a Keyword Value

Note: The **Replace Keywords** action in the Configuration module is not logged in a document's history log.

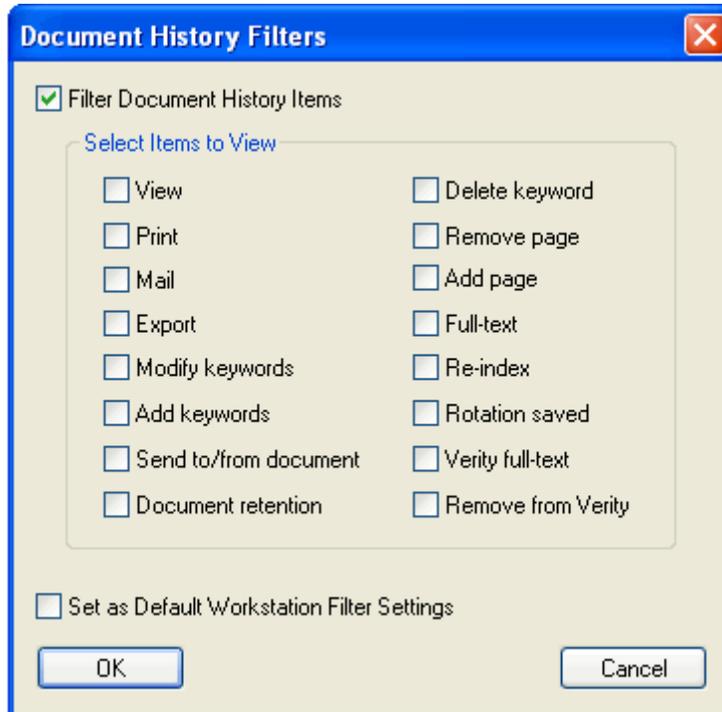
- **Detail**

Lists the Document Handle and the Auto-Name of the document

Filtering a Document's History

To filter results based on instances of actions shown in the table below:

1. Right-click the top window of the **Document History** dialog box and select **Filter Items**. The **Document History Filters** dialog box is displayed:



2. Select **Filter Folder History** Items to turn on filtering. To turn off filtering, clear this option.
3. Select or clear the types of actions you want to view. Available options are described in the following table:

Option	Description
View	Viewing of the document.
Print	Printing of the document.
Mail	Mailing of the document.
Export	Exporting the document.
Modify keywords	Modification of Keyword Values.
Add keywords	Addition of Keyword Values.
Send to/from document	Sending of the document using External Mail/Internal Mail or Advanced Mail.
Document retention	Use of Document Retention process.
Delete keyword	Deleting Keyword Values.

Remove page	Removal of a page from the document.
Add page	Addition of a page to the document.
Full-text	The Full-text option is used to filter the history window for the transaction log messages that are recorded when a document is full text indexed using MS Full Text.
Re-index	Re-indexing of the document.
Rotation Saved	Saving a rotation of an image document.
Verity full-text	Document used by Verity Full-Text retrieval or indexing.
Remove from Verity	Removal of document from Verity Retrieval.

4. **Select Set as Default Workstation Filter Settings** to save the selected filter options. This option saves the current filter as a workstation setting. Whenever a folder's history is accessed from the current workstation, the selected filters are applied.

If you do not select this option, the default filter behavior remains unchanged.

5. Click **OK**. The actions you selected are displayed in the document's history. The word (Filtered) is displayed in the **Document History** title bar, indicating that filtering is turned on. To turn off filtering, see the following procedure.

Note: If no action items are selected in the **Document History Filters** dialog box, all of the actions related to the document will be displayed in the **Document History** dialog box.

Turning Off Document History Filters

The following steps describe how to turn off filtering in the **Document History** window:

1. Right-click within the Document History window and select **Filter Items**.
2. Clear the **Filter Document History Items** option.
3. Select the **Set as Default Workstation Filter Settings** option to have filtering turned off by default. Clear this option to retain the default filter behavior.
4. Click **OK**. All logged actions are displayed in the **Document History** window, and (Filtered) is removed from the title bar.

Generating a Document History Report

A report consisting of a document's history can be generated from OnBase. To generate a document history report: Open the **Document History** dialog box by performing one of the following actions:

1. Right-click on a document in an open document and select **History**.
2. Right-click on a document in a **Document Search Results** list and select **History**.

Either of the above actions will display the **Document History** dialog box.

3. To generate a Document History report, right-click in the **Document History** dialog box and select **Generate Report**. The new report is generated and displayed.

The report that is generated is stored in the **SYS - User Reports** Document Type. Any report generated in the **Document History** dialog box can be retrieved in the Client module using this Document Type as a search criterion.