

OnBase: New User Request Worksheet

Date:

Requestor / District:

User Name(s):

Doc Types User can access:

Document Privileges

- Retrieve/View
- Create
- Modify
- Save Rotation
- Delete
- Print
- External Mail
- Internal Mail
- Re-index
- View Revision
- Create Revisions
- View Versions
- Create Versions
- Modify Keywords
- View Keywords
- Access Restricted Keywords
- Add/Modify CAD Services Hotspots

- Create Reference

Client Features Privileges

- Retrieve Dialog
- Import
- Envelopes
 - Sharing
- Document Properties
- Copy to Clipboard/Save As
- User / Workstation Options
- Enable Markup Toolbar
- Doc Retention Exclusion
- Doc Retention Remove Exclusion
- Thumbnail Hitlist Results Viewer
- Toolbar Configuration
- External Text Search
- Folder Properties

Scan/Index Batches Privileges

- Index Scanned Documents
- Commit Scanned Batches
- Purge Scanned Batches
- Purge Committed Scanned Batches
- Change Batch Scan Queue
- Rename Scan Batches

**Folder Privileges

- Retrieve/View
- Create
- Modify Keywords
- Modify Folder Contents Keywords
- Copy
- Move
- Delete
- Add Documents
- Remove Documents

**** Folders require additional information to set up.**