OnBase Runtime Client

Monthly agency financial reports that were previously made available on microfiche will, beginning with the July 2002 reports, be distributed to agencies in CD format. To read Report CDs, a computer must use the OnBase Runtime Client; a copy of which is included on every monthly CD.

The following are instructions for the initial installation of the software to be loaded on each agency computer used to read the reports on CD.

Please note that once the OnBase Runtime Client has been installed on your computer, you will get a new CD each month containing the new month's reports. It will not be necessary to re-install the database again unless you try to read CD on another computer.

Installing OnBase Runtime Client

1. Make sure to exit all applications before starting the installation process.
2. Insert the CD-ROM into your CD-ROM drive. The installation program starts automatically if Autorun or Insert Notification is turned on for your computer. If installation program starts automatically, a dialog box opens and asks if you want to install. Click **Next**. The dialog box will appear, which will give you an option to install the OnBase Runtime Client to your computer's hard drive or to run it directly from the CD. It is highly recommended that you install it. If you choose to do that, click **Yes** and then follow the set-up instruction.
   Note: On one of the screens you will be prompted to enter the Username and Password. (You have been supplied with that information; please check the label on the case of your CD.)
3. If you choose to run it directly from the CD click **No** and then follow the set-up instruction.
4. When in OnBase Logon screen type your User Name and Password as they appear on the label of the CD case and click **OK**, if you have problems locating that information you may contact your GAO liaison to obtain that information.
5. In the **Software License Agreement** dialog box, read the Software License Agreement, then check 'I accept the agreement' button and click **Continue.** (If you click **I decline the agreement**, you will exit the installation program.)
6. Now you should see the OnBase Client Document Retrieval dialog box. (See below.)

Viewing the Reports

The Document Retrieval screen contains four major sections:
- Document Type Groups section
- Document Types section
- Keywords section
- Dates section

The **Document Type Groups** section displays all the document type groups to which the user has access, which in this instance should be **AFIS - Agency Reports**.

The **Document Types** section displays all the documents (DAFR reports) that exist in the entire OnBase document management system. There are several reports displayed in that area, but only selected reports are available to your agency. If you select a report that is not available to you, the prompt *System Message: No Document Found* will appear. Click **OK** and select another report.

Please note that every CD contains all the types of reports that were distributed to your agency in the past on microfiche.

Once a document type is selected, the keyword fields available for that type are displayed in the **Keyword** section. The keyword area displays all keyword types available for the selected DAFR report. The examples of the keyword are: agency name, appropriated fund, fund etc. Please remember that while a retrieval can be run using only the document type, keywords will help narrow down the number of documents that will appear in the search result screen.

If keywords are used with document types, clicking on the **Find** button will directly open the Document Search Results window. If keywords are not used, a Query Warning window will first be displayed confirming the execution of the unrestricted query. Clicking on the **Yes** button will then open the Document Search Results window. On this window, you will need to double-click on a specific DAFR report to view the data.

Since the General Accounting Office (GAO) will provide your agency with a separate CD for each month, the **Dates** section is not used.

Printing the Reports

If you select the print option (File-Print), the Print Document menu option will bring up the printer dialog. From here, the OnBase print queue and print format can be selected. By default, the print queue Local Printer will automatically be mapped to the Windows default printer. The print format should be always selected to COLD REPORTS for proper printing format.

Please note that whenever the warning message *No paper source defined for this format, resetting to lower bin* appears, click **OK**.

Additional Information

You can perform a text search. If you click on **Text Search** button, the External Text Search window will be activated. A specific text string can be searched across multiple DAFR reports. The search value and status of the search job will be displayed. Double clicking on the search job will display a listing of all the documents that contain at least one hit. Double clicking on one of these document items will open it (DAFR report) and display the appropriate line.

Please note that there is no **Help** feature available at this time.

We hope this method of report distribution will enhance our service quality and will provide you with easy access to financial data. If you have any concerns, questions or comments please feel free to contact your GAO Liaison.

A customer satisfaction survey card is enclosed. Please take a moment to give us your feedback by returning the card. We look forward to hearing your comments and suggestions to improve our service.