# Sharing Documents (Email & Envelopes)

How to Email a Document to Someone Internally (City Employee)

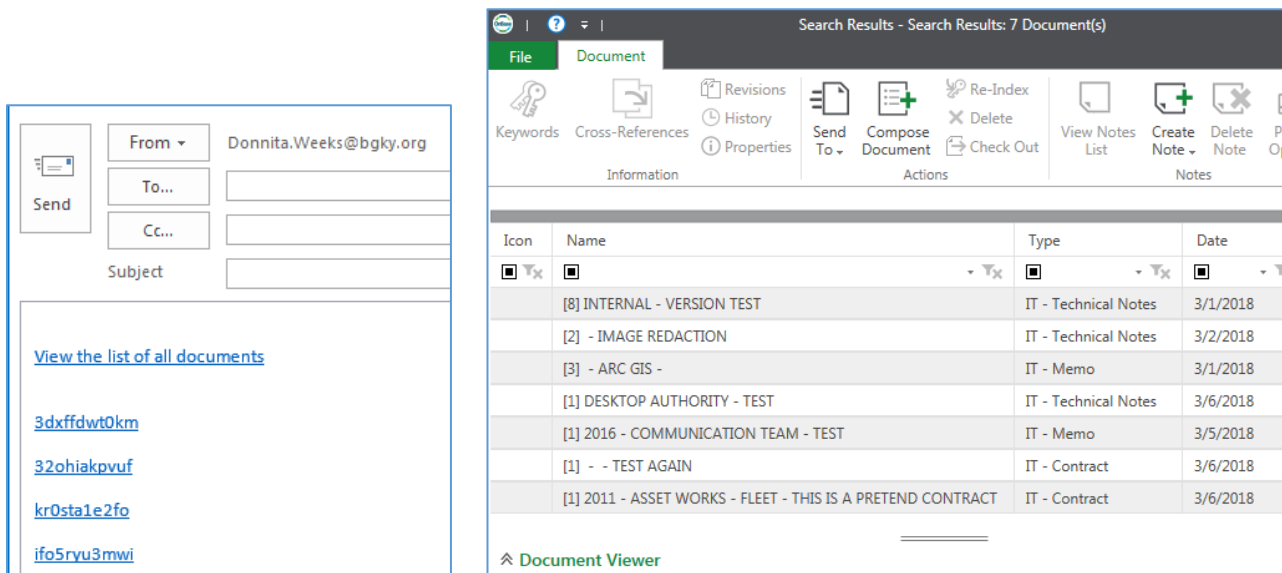To email a document to a city employee you can just send a link to the OnBase document.

Single Document:

- Right-click the document in search results -> **Mail Recipient (as Link)**.
- Your Outlook client opens with a link to the document. The recipient can click the link to open it directly in OnBase.
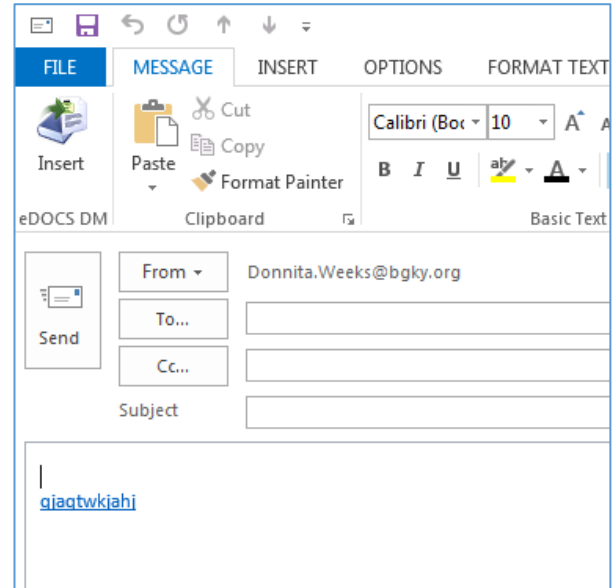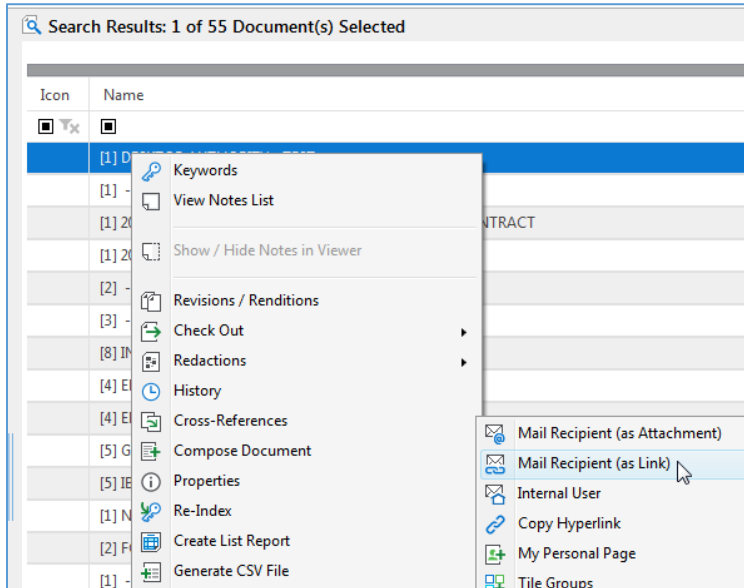
Multiple Documents:

- Select multiple documents and use **Mail Recipient (as Link)**.
- Each document will appear as a separate link.
- Optionally, you can keep only the top link by deleting everything after **View the list of all documents**.


Note: Links do not work in the OnBase Web Client or Outlook Web Access (OWA).

**How to Email a Document to Someone Externally (Not a City Employee)**

Using Outlook on Your PC:

1. Right-click the document → **Send To** > **Mail Recipient (as Attachment)**.
2. **PDF, Word, Excel, PowerPoint**: Outlook opens automatically with the document attached.
3. **Images**: A panel appears to select the attachment format (default: PDF). Click **Send** to open Outlook with the attachment.
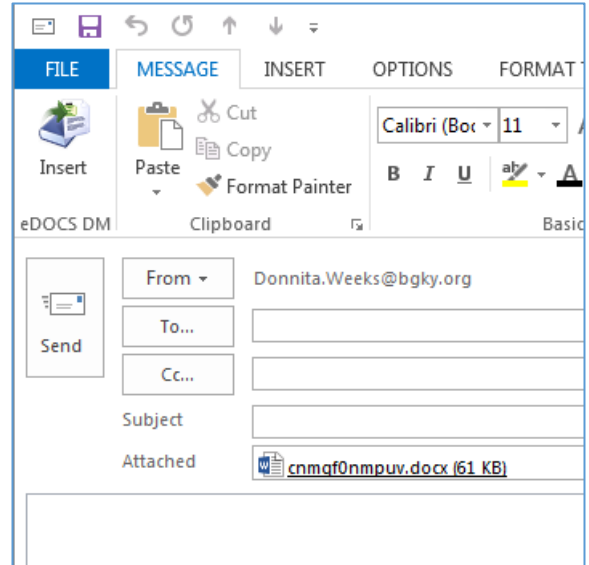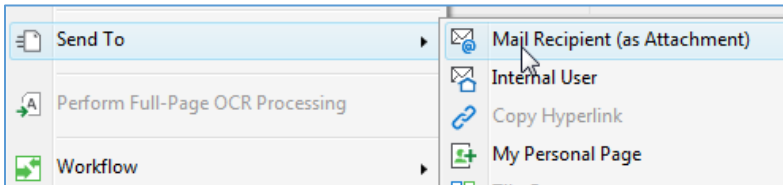
Using a Shared PC / Outlook Web Access:

1. Right-click the document → **Send To** > **File**.
2. A panel appears to save the file locally (default: Desktop).
3. Change the filename or directory if needed.
4. Click **Save** to store the document on your computer, then attach it manually to an email.
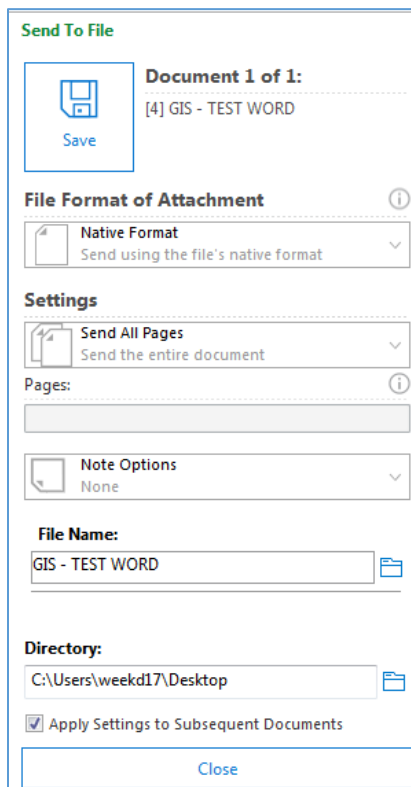
How to Use Envelopes (Folders)

Envelopes are very similar to folders. They allow you to group and keep related documents in one location and easily send them to other users.

Note: Creating and sharing envelopes does not override existing document security; users still need permission to view specific document types.
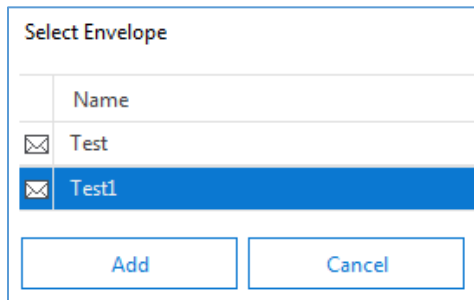
Create an Envelope:

- **Home** tab → **Envelopes** → **Create Envelope**.
- Enter a name → click **OK**.
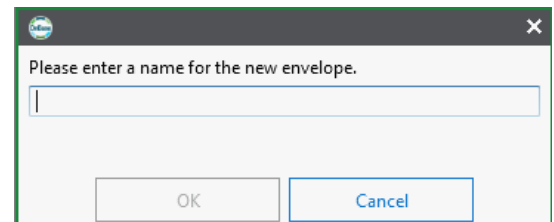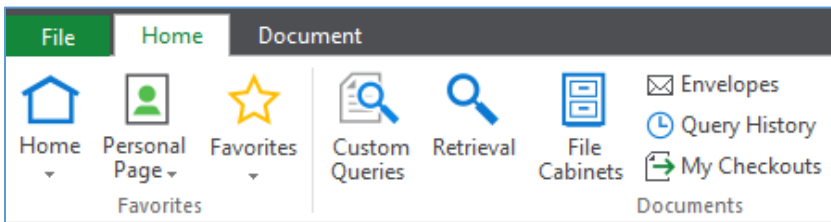
Add Documents:
- From search results, right-click → **Send To** > **Envelope**.
- Select one or multiple documents using **Shift** or **Ctrl**.
- Choose the envelope → click **Add**.

View Envelope:
- Go to **Home** tab → select **Envelopes** → click the envelope to see its documents.

Remove Documents:
- Right-click → **Remove From Envelope** (document remains in OnBase).

Delete Envelope:
- Select envelope → click **Delete Envelope(s)**.

Share Envelope:
- Click **Share Envelope**.
- Move users from Available Users → Selected Users.

- Assign permissions: **View, Add, Remove**, or **Full Control**.

Note: Creating and sharing envelopes does not override existing document security; users still need permission to view specific document types.