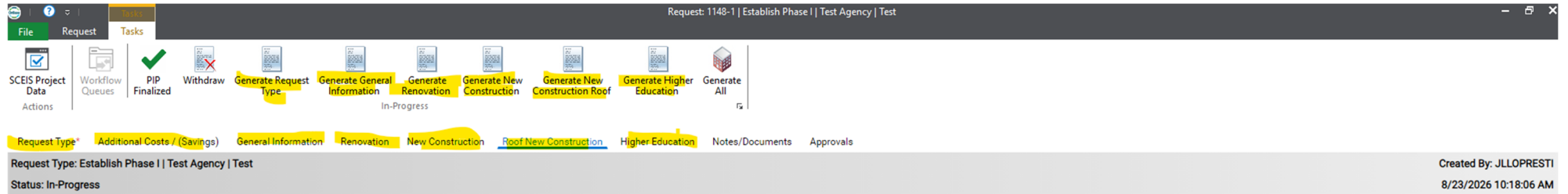


## Document Generation

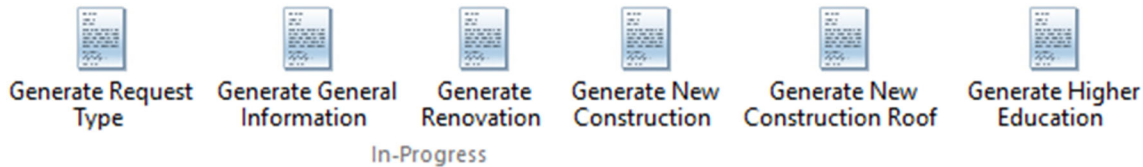
When a Request Type is “In-Progress” status, documents can be generated.

The system will display options to generate documents based on the individual tabs displayed in the request.



To generate a document select the appropriate  icon in the header.

In the example above, there are the following options.



Once you select one of the  options reflected in the header of your request, a **Composition Preview** screen will be displayed.



If you have a dual monitor setup, the generated Word document may open on different monitor, or the document may simply be reflected in the task bar. From there, you can select it to review.



If desired, you are able to modify the Word document.

**DO NOT** select save in the Word document. This will not save the document in OnBase.

To save the document in OnBase, refer back to the  **Accept** screen, and select  **Accept**.

Upon selecting  **Accept**, the modified (or unmodified) Word document generated will save to the **Documents** table in the **Notes/Documents** tab. The Word document will also automatically close out.

Request Type\*Additional Costs / (Savings)General InformationRenovationNew ConstructionRoof New ConstructionHigher EducationNotes/DocumentsApprovals

Request Type: Establish Phase I | Test Agency | TestStatus: In-ProgressCreated By: JLLOPRESTI8/23/2026 10:18:06 AM

Notes/Documents

Request Number1148-1StatusIn-Progress

System Notes

| Description | Created By | Created On |
|-------------|------------|------------|
|-------------|------------|------------|

Show 100 records

User Notes

| Description | Created By | Created On |
|-------------|------------|------------|
|-------------|------------|------------|

Show 100 records

Documents

[1]PIP Request Type A1 - 65432 | Test

Once saved to the **Documents** table, you are able to click on the saved document to view it. It cannot be modified once saved.

All generated documents will appear in the **Documents** table.

If a document is regenerated, the previous document saved to the **Documents** table will be replaced with the new document.

**Saved documents cannot be deleted from the **Documents** table.**

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In the **Composition Preview** screen there are three additional options (  ,  and  ) that can be selected.



Redo

should be used when you modify a Word document and then decide that you do not want to save those changes. When selected, the modified Word document closes out and a new Word document is generated.



Cancel

should be used when you generated a document but do not desire to save it.



Print

should be used when you want to either save the document on your computer as a Word or PDF document, or if you want to print a hard copy of the generated document. If, after printing the generated document you desire to save it

in the system, you must still select  on the **Composition Preview** screen.



Generate  
All

Lastly, there is an option to **Generate All** documents simultaneously. However, if this option is selected, it will take the system several minutes to generate each document, and the generated documents cannot be modified and will automatically all save to the **Documents** table.