



Agenda

- **Matrix Imaging, OnBase, Hyland Software**
- **The OnBase Client (thick) and other modules**
- **System Architecture**
- **Configuring OnBase**
 - **Storage**
 - **Indexes (Keywords)**
 - **Document Types**
 - **User security**
- **Input**
- **Integration with other applications**



- **Matrix Imaging**
- **OnBase**
- **Hyland Software**

- **The OnBase Client (thick)**



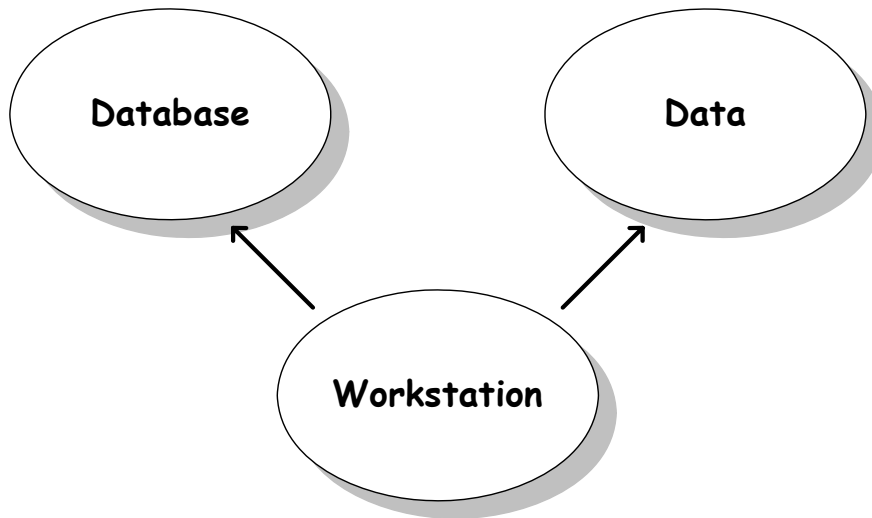
University of Alaska OnBase Modules

- Document Imaging
- COLD
- DIP
- Web Server
- E-Forms
- Workflow
- DDS
- Archival and Query APIs
- Client licenses



System Architecture

Client-Server / 2-Tier



- OnBase Fat Client Executable
- Client PC Operating System
- Network/Local User Rights
- ODBC Drivers
- Internal Network
- Database and File Servers
- OnBase Database
- OnBase Disk Groups

System Architecture

Web or API / n-tier

- OnBase Browser ActiveX Viewer
- OnBase DHTML and JavaScript
- OnBase Client-side DLL's
- Browser XML Parser
- Browser Scripting Object
- Browser Caching
- Browser Security and Config.
- Browser Software
- Network/Local User Rights
- Client PC Operating System
- Client Network
- DNS Name Resolution
- Proxy/Cache/SSL Servers
- Firewalls

CLIENT NETWORK TIERS

INTERNET

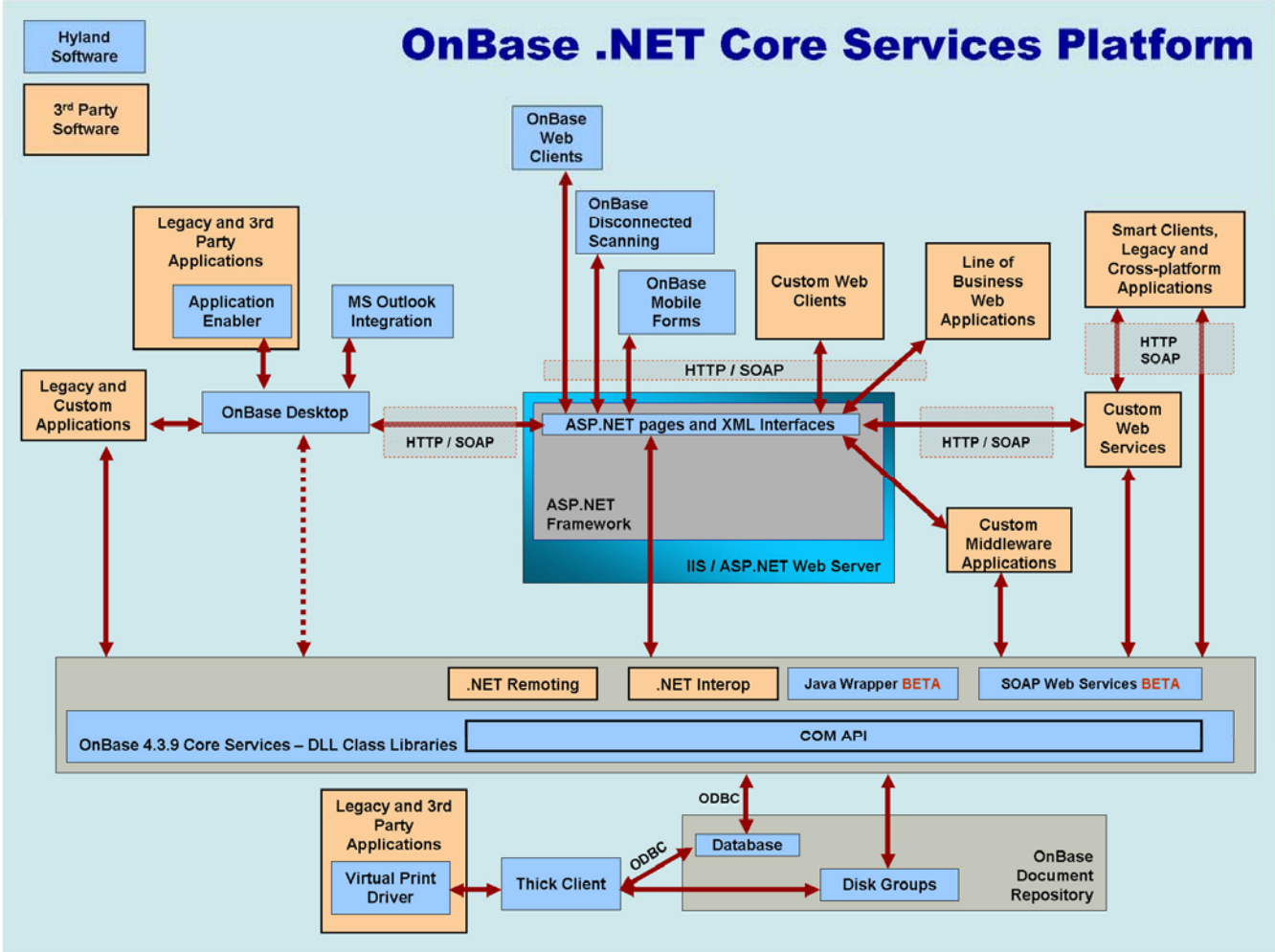
SERVER NETWORK TIERS

- DMZ Exterior Firewalls
- DMZ Proxy/Cache/SSL Servers
- DMZ Network Addressing
- DMZ Network
- Web Server PC Operating System
- Network/Local Admin. Rights
- IIS Software
- IIS Web Server Caching
- IIS Web Server Security & Config.
- IIS Application Pool Security & Config.
- IIS Virtual Directory Config.
- IIS Web Server XML Parser
- OnBase ASP.NET Pages/HTML/VBscript
- IIS ASPNET.DLL page filter
- IIS Session State handler
- OnBase Core Services DLL's
- ODBC Drivers
- DMZ Interior Firewalls
- Internal Network/DNS/Proxy
- Database and File Servers
- OnBase Database
- OnBase Disk Groups

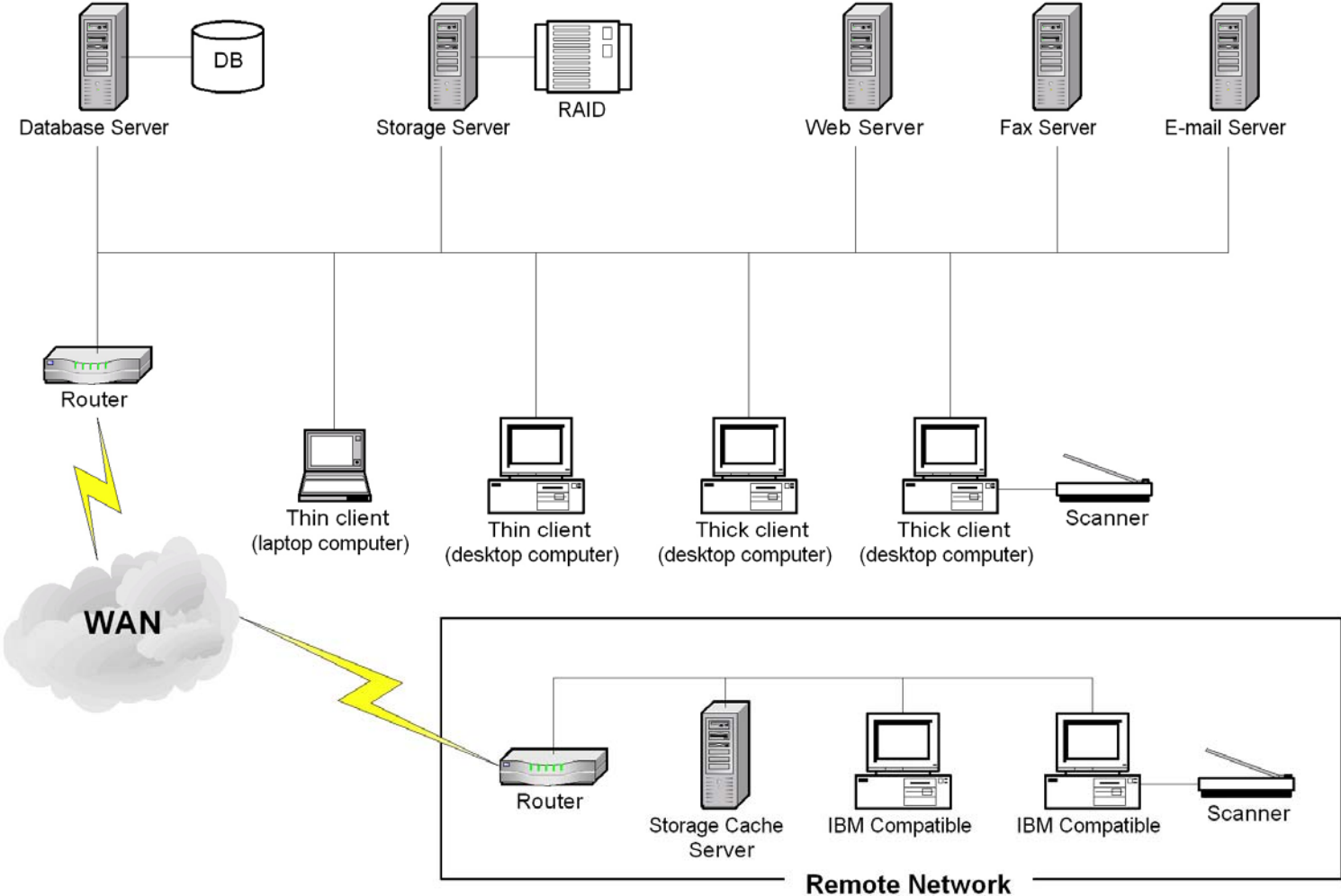


Matrix Imaging

System Architecture

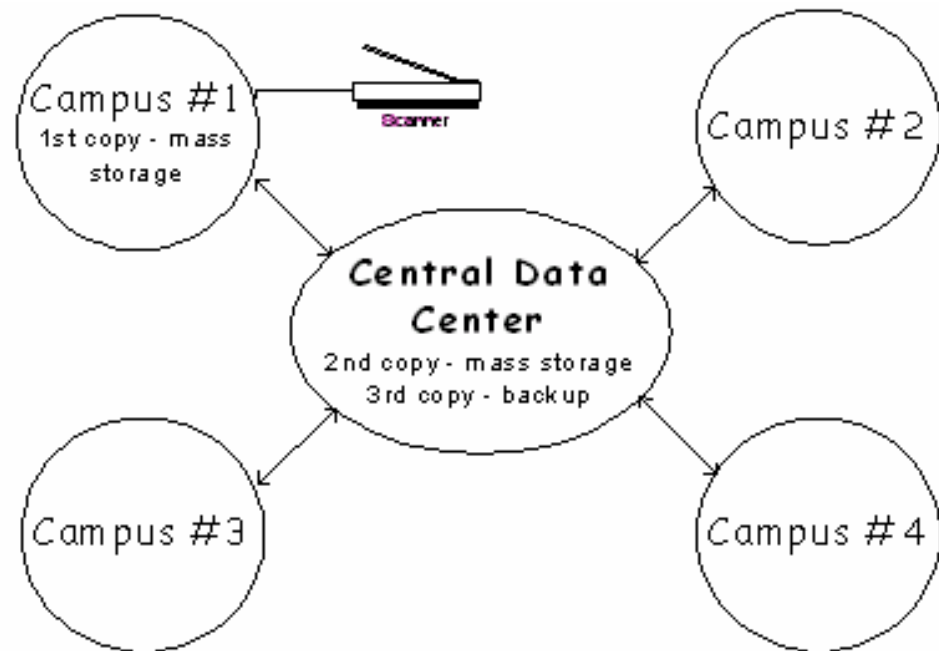


System Architecture



Configuring Storage

- Estimating storage volume
- Determine storage devices
- OnBase Disk Groups
 - Volumes
 - Copies



Configuring Keywords (indexes)

- OnBase allows an unlimited number of keyword fields.
- Keyword Type groups may be used for keywords that are normally used together for better database efficiency (speed).
- Multi-Instance Keyword Type Groups act as a set of keywords.
- Autofill Keyword Sets.

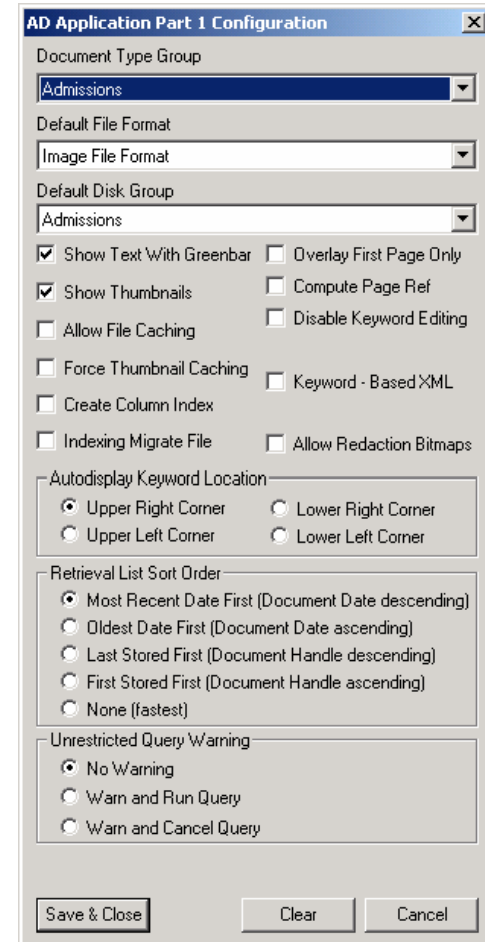
The screenshot shows the 'Keyword Type Settings' dialog box with the following configuration:

- Status:**
 - Data Type:** Alphanumeric Single Table (selected). Maximum Length: 0.
 - Advanced:** External Validation (unchecked).
 - Classification:** Info. Only (No Index) (unchecked), Not For Retrieval (unchecked), AutoFill Keyword (unchecked).
- Data Sets / Drop Down Lists:** Use Keyword Data Set (unchecked), Allow Drop - Down Lists (unchecked), Descending Lookup (unchecked).
- Usage Restrictions:** None (selected), Keyword Must Be Unique (unchecked), Keyword Must Exist (unchecked).
- Display Options:** Auto Display (unchecked), Invisible (unchecked).
- Autofill Keyword Sets:** << None >> (selected).
- Export/Publishing Options:** Use Other SQL Method (unchecked).

Buttons: Save & Close, Cancel.

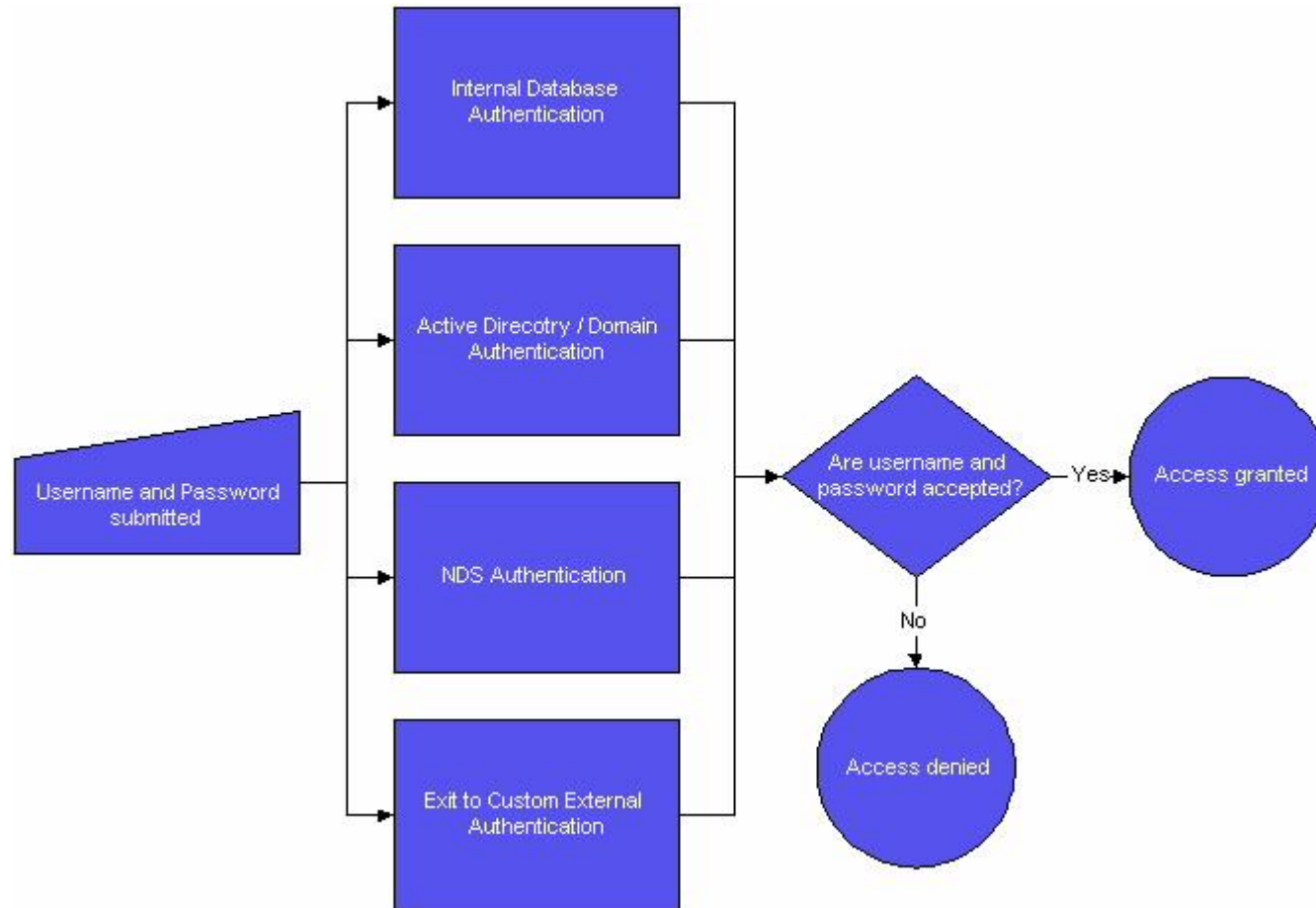
Configuring Document Types

- Document Type Groups
- Document Types
- Documents
 - File formats
 - Cross References
 - E-Forms
 - Overlays & Style Sheets
 - Renditions & Revisions
 - Security

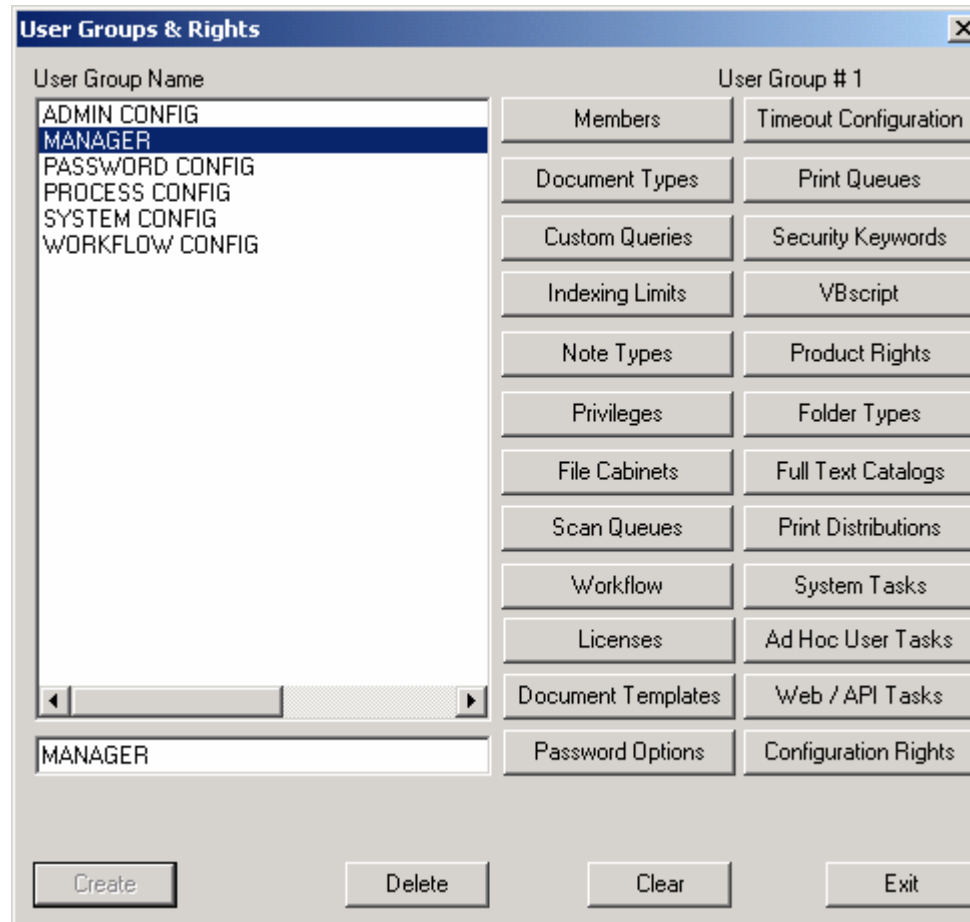


Configuring Security

User Authentication



Configuring Security Rights



Configuring Security

Privileges and Product Rights

Assigning User Group Privileges for MANAGER Group.

Documents <ul style="list-style-type: none"><input checked="" type="checkbox"/> Retrieve / View<input checked="" type="checkbox"/> Create<input checked="" type="checkbox"/> Modify<input checked="" type="checkbox"/> Save Rotation<input checked="" type="checkbox"/> Delete<input checked="" type="checkbox"/> Print<input checked="" type="checkbox"/> External Mail<input checked="" type="checkbox"/> Internal Mail<input checked="" type="checkbox"/> Reindex<input checked="" type="checkbox"/> Revision Control	Folders <ul style="list-style-type: none"><input checked="" type="checkbox"/> Folder System<input checked="" type="checkbox"/> Retrieve / View<input checked="" type="checkbox"/> Create<input checked="" type="checkbox"/> Modify<input checked="" type="checkbox"/> Delete<input checked="" type="checkbox"/> Add Documents<input checked="" type="checkbox"/> Remove Documents
Client Features <ul style="list-style-type: none"><input checked="" type="checkbox"/> Retrieve Dialog<input checked="" type="checkbox"/> Import<input checked="" type="checkbox"/> Envelopes<input checked="" type="checkbox"/> Document Properties<input checked="" type="checkbox"/> Copy to Clipboard / Save As<input checked="" type="checkbox"/> User / Workstation Options	Client Based Products <ul style="list-style-type: none"><input checked="" type="checkbox"/> Create List Report<input checked="" type="checkbox"/> Full Text Search<input checked="" type="checkbox"/> Statement Rendering<input checked="" type="checkbox"/> Index Scanned Documents<input checked="" type="checkbox"/> Host Application Enabler<input checked="" type="checkbox"/> Workflow<input checked="" type="checkbox"/> Customer Information

Save & Close Set All Reset Clear Cancel

Assigning Product Rights for MANAGER Group

Registered Processing Products <ul style="list-style-type: none"><input checked="" type="checkbox"/> Client<input checked="" type="checkbox"/> COLD Processor<input checked="" type="checkbox"/> Check Image Processor<input checked="" type="checkbox"/> Document Import Processor<input checked="" type="checkbox"/> Scan<input checked="" type="checkbox"/> XML Tagged Import<input checked="" type="checkbox"/> Publishing<input checked="" type="checkbox"/> Exception Reports<input checked="" type="checkbox"/> Full Text Indexing<input checked="" type="checkbox"/> Export<input checked="" type="checkbox"/> Print Distribution<input checked="" type="checkbox"/> HTML Forms<input checked="" type="checkbox"/> Document Retention	Administrative Privileges <ul style="list-style-type: none"><input checked="" type="checkbox"/> Import Manager<input checked="" type="checkbox"/> Platter Management<input checked="" type="checkbox"/> Autofill Keyword Set Mgmt<input checked="" type="checkbox"/> Transaction Log<input checked="" type="checkbox"/> User Management<input checked="" type="checkbox"/> Utilities<input checked="" type="checkbox"/> Retrieve by Document Handle / File Name<input checked="" type="checkbox"/> Run Scripts<input checked="" type="checkbox"/> Keyword Update<input checked="" type="checkbox"/> Document History<input checked="" type="checkbox"/> Override Query Restrictions<input checked="" type="checkbox"/> Document Distribution<input checked="" type="checkbox"/> Checkout/Check In Override<input checked="" type="checkbox"/> Auto-Publishing
Configuration <ul style="list-style-type: none"><input checked="" type="checkbox"/> Configuration<ul style="list-style-type: none"><input checked="" type="checkbox"/> Database Management<input checked="" type="checkbox"/> User Profile Management	Administrative Processing Privileges <ul style="list-style-type: none"><input checked="" type="checkbox"/> COLD Processor<input checked="" type="checkbox"/> Check Processor<input checked="" type="checkbox"/> Document Import Processor<input checked="" type="checkbox"/> Document Imaging<input checked="" type="checkbox"/> XML Tagged Import<input checked="" type="checkbox"/> Scheduler<input checked="" type="checkbox"/> Workflow

Save & Close Set All Reset Clear Cancel

Input

■ Scanning

- Production Document Imaging (Kofax or TWAIN)
- Production Document Imaging (ISIS)
- Disconnected Scanning
- Front Office Scanning

■ COLD

- Text or Graphical print output
- Data contains recognizable documents and index values

■ DIP

- Any file format
- Uses a separate import index file for reference

Integration

- OnBase updates (inbound)
- Retrieval
 - Application Enabler
 - Button / programmatic
- Workflow
- Updates to Banner (outbound) – NOT SCOPED
 - batch
 - ODBC

