

University of Alaska Systems

# OnBase 11 Thick Client

## Training Manual



OnBase

## Contents

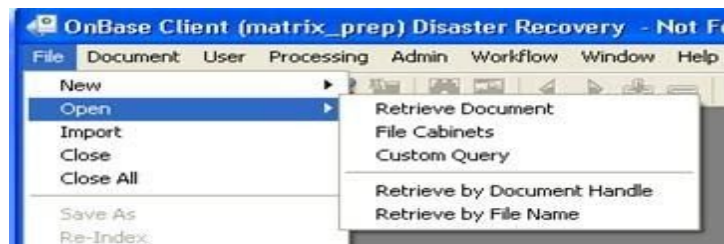
Part 1: Logging Into OnBase	1
Part 2: Document Retrieval	2
Part 3: Modifying Keywords	4
Part 4: Using “History”	5
Part 5: Using “Notes”	6
Part 6: Re-indexing	8
Part 7: Workflow Query	9
Part 8: Workflow	10
Part 9: Custom Query	11
Part 10: Virtual Printer	13
Part A: Basic Requirements	13
Part B: Using Hyland Virtual Print Driver	14
Part C: Finding the Printed Document	17
Part D: Some Notes/Troubleshooting to Consider***	19
Part 11: Importing a Document	23

## Part 1: Logging Into OnBase

1. Launch OnBase on your computer.
2. OnBase should auto-login, but if it does not,
  - a. Enter your UAID, your 30 million number.
  - b. Second Line: Enter your Edir/Elmo password (Same as UA Email/Blackboard Password)
  - c. Press Login

## Part 2: Document Retrieval

- 1) To Open “Document Retrieval” (2 Different Ways)
  - a. File → Open → Retrieve Document

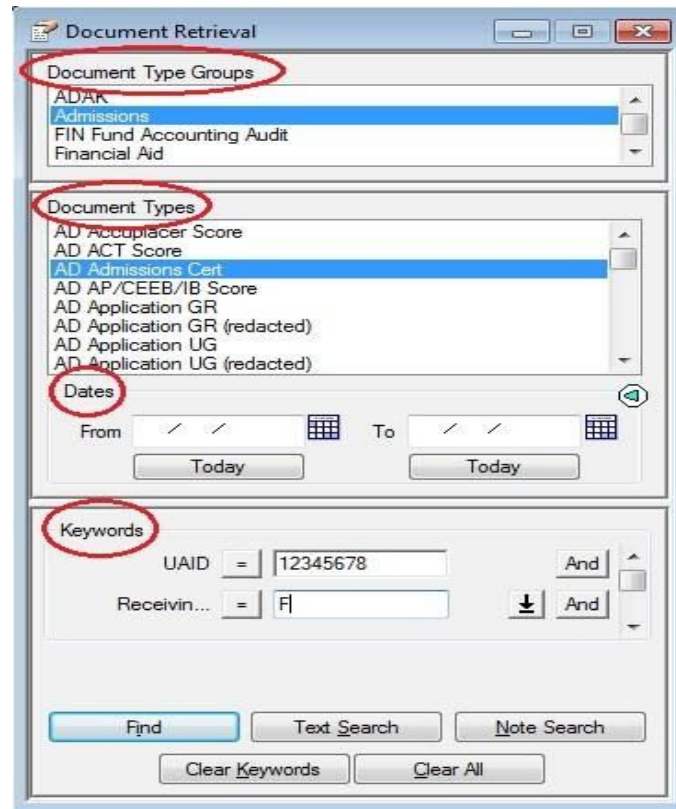


- b. Left-click on the icon indicated by the red circle in the below image.

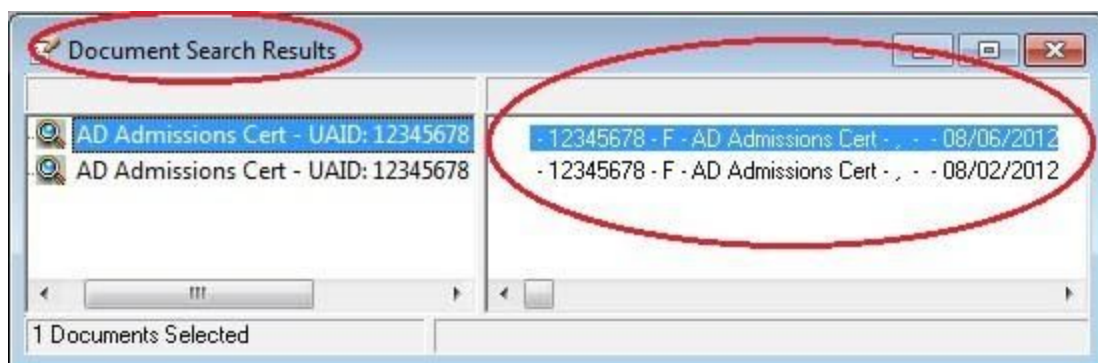


- 2) The document retrieval window will open
- 3) Choose a “Document Type Group” (To specify choices in “Document Types”)
- 4) Choose a “Document Type” (May choose more than one by holding ctrl)
- 5) Enter “Dates” (Optional)
- 6) Enter “Keywords” (Red Areas are Required)
  - a. **Warning:** DO NOT hit search without entering a search criteria. This will cause your system to freeze as it will try to pull up every document in OnBase)
  - b. If you need to search multiple keywords, double clicking the text box or hitting F6 will duplicate the text box.
  - c. There are also a few symbols that can help with searching. The \* wildcard character can be used to replace one or several characters of a text string. For example, the text string Smit\* will find all instances of both Smith and Smithsonian. And the ? wildcard character can be used to replace a single

character in the text string. For example, the text string SM?TH will find all instances of both Smith and Smyth.

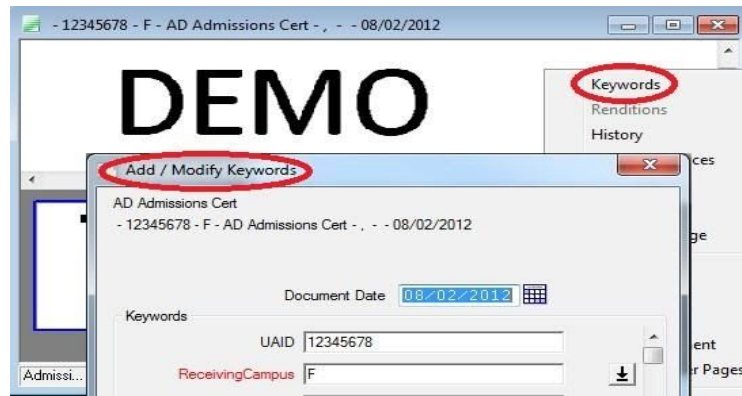


- 7) Click "Find"
- 8) "Document Search Results" window will pop up
- 9) To open the document, Double-click on the document in the right window

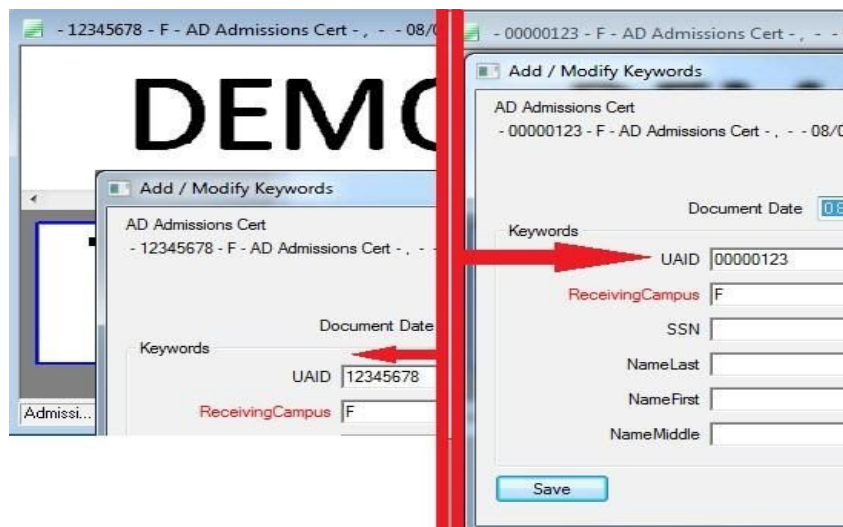


### Part 3: Modifying Keywords

- 1) After retrieving and opening the document, the keyword(s) can be modified
- 2) To modify a keyword, right-click on the opened document and click on “Keywords”
- 3) The new window “Add / Modify Keywords” will open



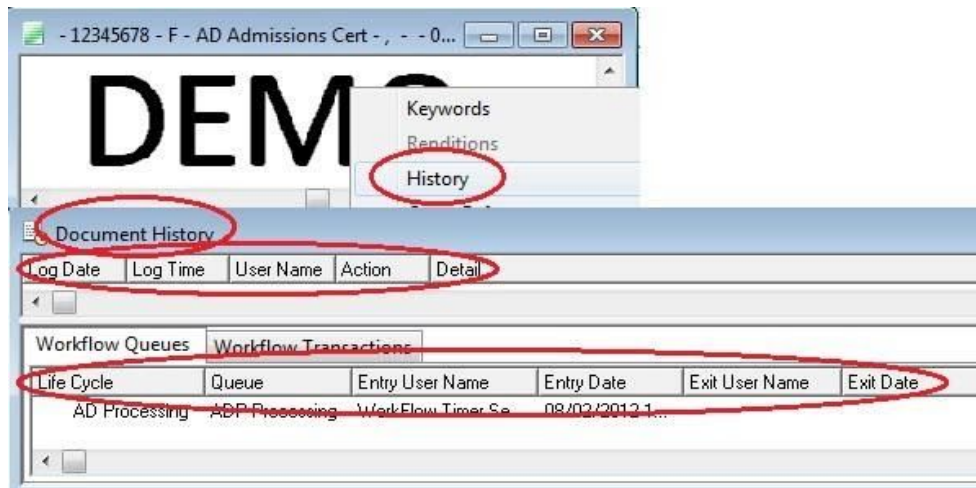
- 4) For demonstration purposes, change only the “UAID” from 12345678 to 00000123
- 5) 5) Click save after changing the keyword



- 6) Above, Figure 6 shows the modifications in comparison
  - **Note:** To find the same document you will have to search the new modified keyword(s)

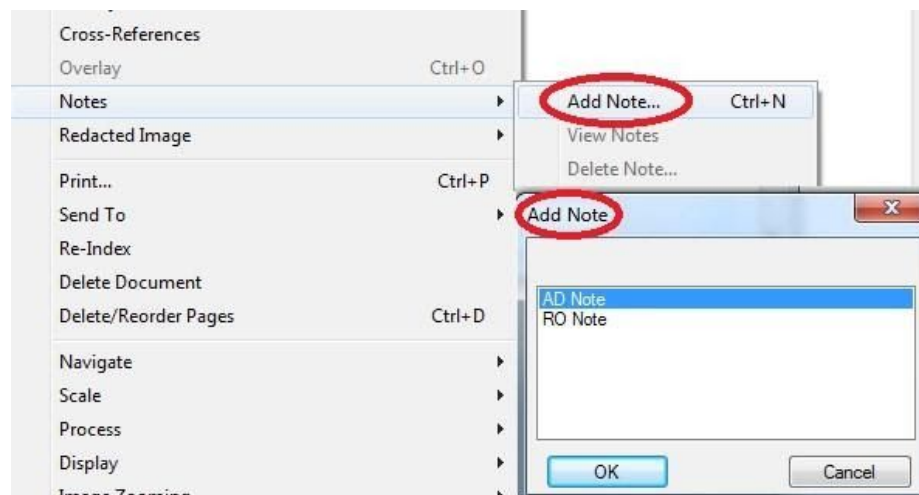
## Part 4: Using “History”

1. To look at the History, right-click on the retrieved document and click “History”
2. The “Document History” window will open
3. The two red circles below “Document History” is what tells the user more information
4. The user will see what time and date a user looked at the document, the user name of who looked at the document, and the action the user did to the document and in detail what they did.
5. The user can also look at the Workflow Queues and Workflow Transactions below

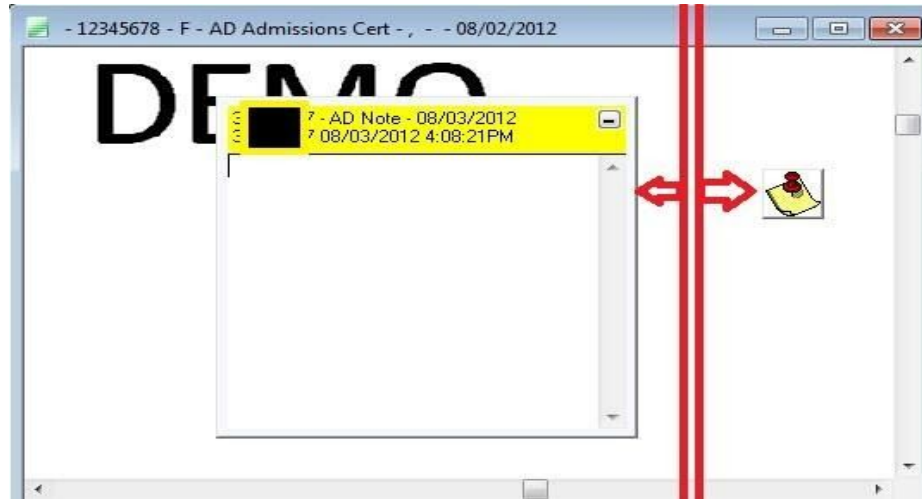


## Part 5: Using “Notes”

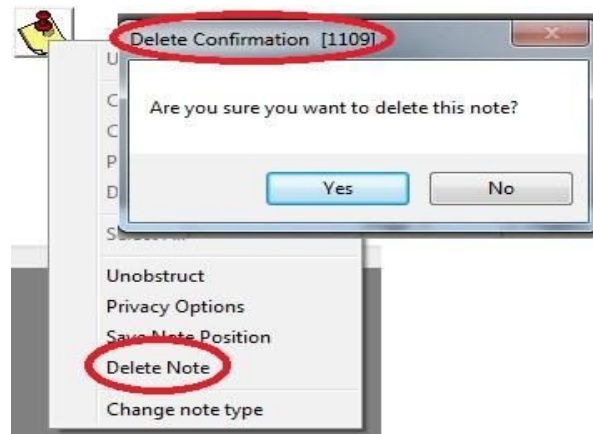
- 1) To add a note to your retrieved document right-click then go to “notes”
- 2) Then go to “Add note...”
- 3) A new window will pop up called “Add Note” with 2 options
- 4) Select the appropriate note and press ok



- 5) A note will appear on your window which consists of the username's UAID, when the note was made and the time.
- 6) The user can minimize the note by double clicking on the yellow part of the note or by clicking the top right minimize button and maximize by double clicking on the minimized note

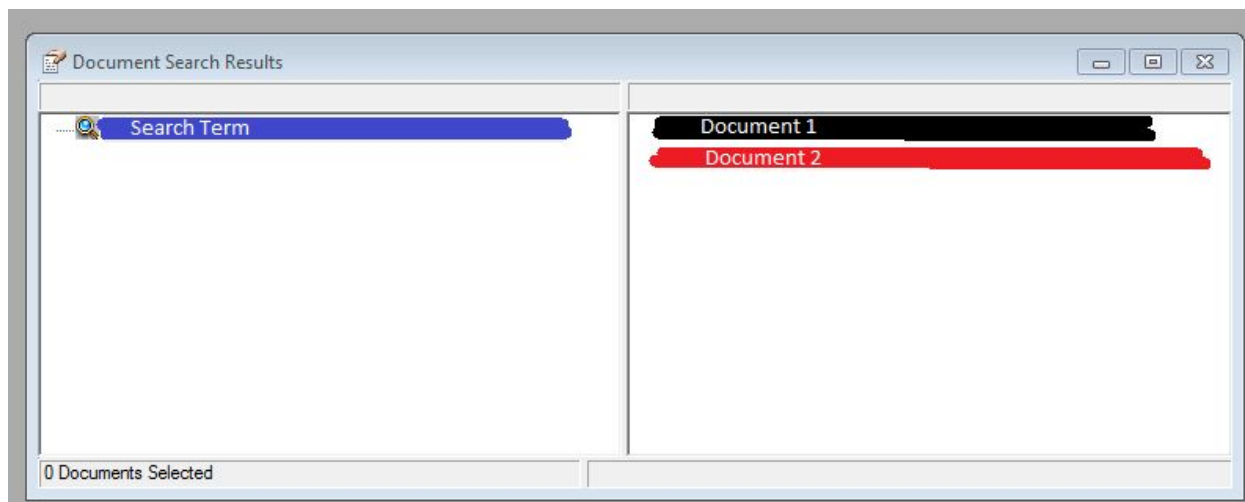


- 7) To delete a note, a user may do it 2 ways
  - a. First by going to notes then view notes as it shows in Figure 8 on page 6, then right click on the "view note" window and delete the note.
  - b. Second, as shown below, right-click on the note and go on "Delete Note" and press yes.





There is also a function called staples that are sort of like notes. Staples are a way to attach documents together. For example, you could staple all documents related to a single customer together, or all documents relating to a certain date together.

Step One: You must have the documents you want to staple easily accessible.

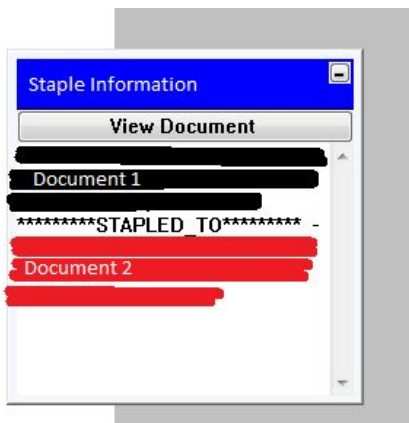


Step Two: Open the documents in separate windows. Right click Document 2 and drag it onto Document 1 while holding the mouse button down. Repeat for as many secondary documents as you have.

Document 1 will show this icon: 

Document 2 will show this icon: 

To view the staple, double click the staple icon. The staple window will display.

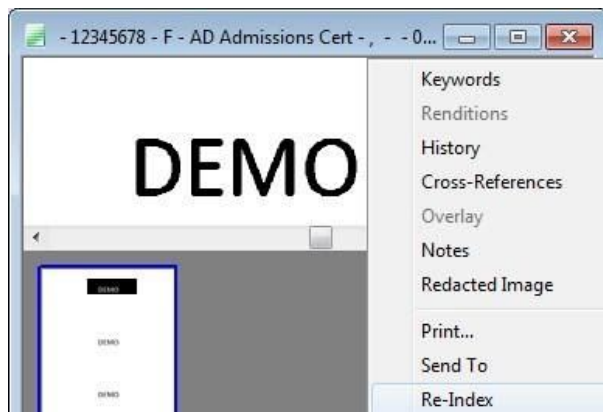




Click “View Document” to see the document stapled to the one you are currently viewing.

## Part 6: Re-indexing

- 1) To re-index a document right-click on the retrieved document and choose “Reindex”



- 2) A window like the one below will come up
- 3) To re-index, choose and change the Document Type Group and Document Type and don't change the File Type as it is unnecessary.

Two side-by-side screenshots of the "Re-Index Document" dialog box, connected by red arrows indicating a sequence of changes. The left window shows the initial state: Document Type Group is "<< ALL >>", Document Type is "AD Admissions Cert", and File Type is "Image File Format". The right window shows the changes: Document Type Group is "Admissions", Document Type is "AD Application UG", and File Type remains "Image File Format". Both windows have a "Keywords" section with fields for UAID (12345678), ReceivingCampus (F), SSN, NameLast, NameFirst, NameMiddle, DOB, and ProcessingStatus. The right window also includes fields for Term (2012), PCI Compliant (NO), ApplicationSource (ONLINE), Level (UG), UAScholar, and SSN. Both windows have "Re-Index", "Clear Keywords", and "Cancel" buttons at the bottom.

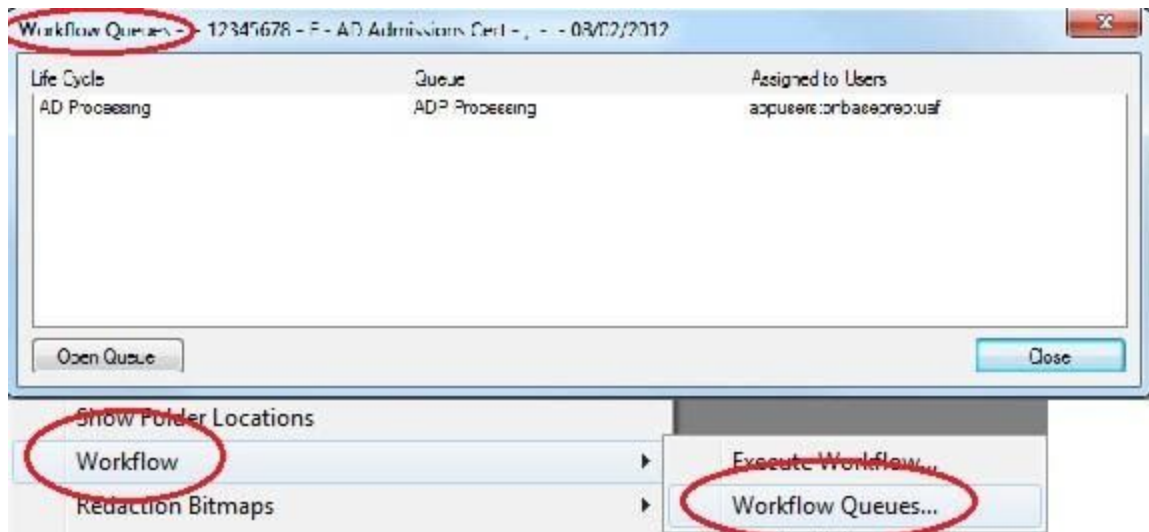
Fill in the required Keywords in red and other areas if need to be changed

- 4) Click “Re-Index” once everything looks good

5) The document can now be searched under the newly changed Keywords and Doc Type

## Part 7: Workflow Query

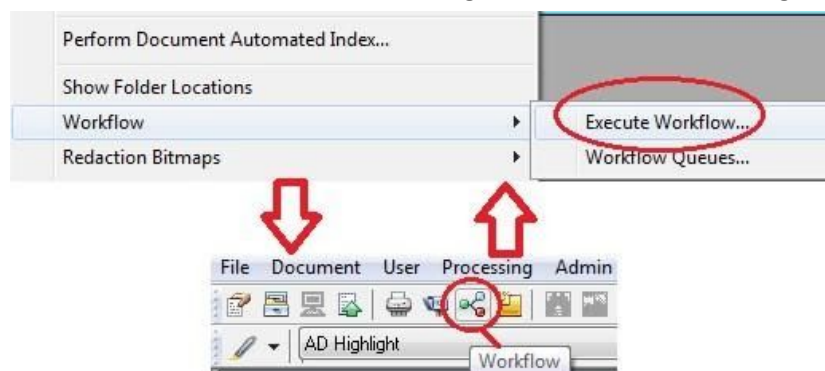
- 1) To start Custom Query, right-click on the retrieved document and go to “Workflow” then “Workflow Queues...”



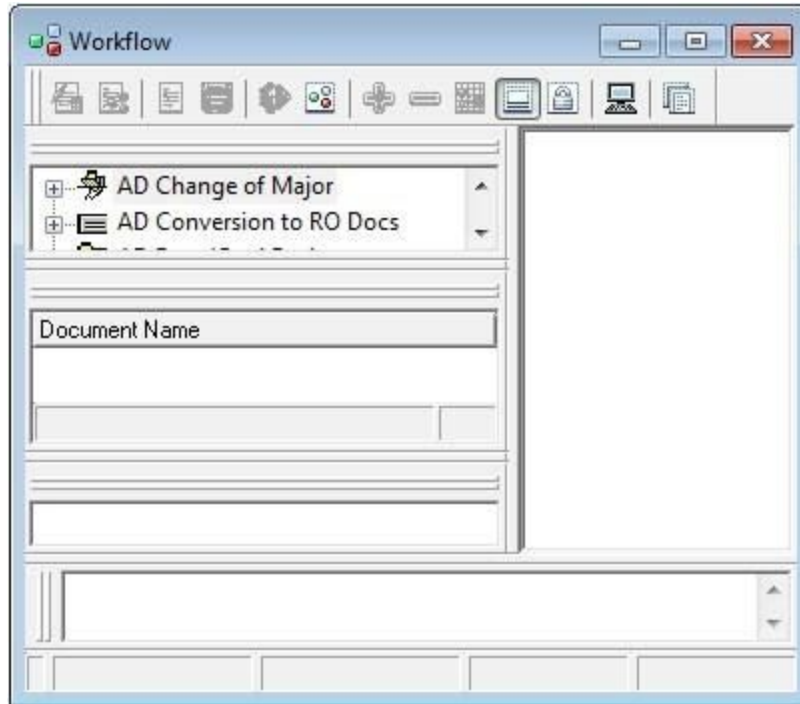
- 2) When the Workflow Queue window opens it lets you know what life cycle queue and user group can see the document.

## Part 8: Workflow

- 1) There are 2 ways To Open “Workflow”
- 2) First, right-click on the retrieved document and go on “Workflow” then “Execute Workflow”
- 3) Second, up above on the tool bar, click on the blue, green, red circles linked together



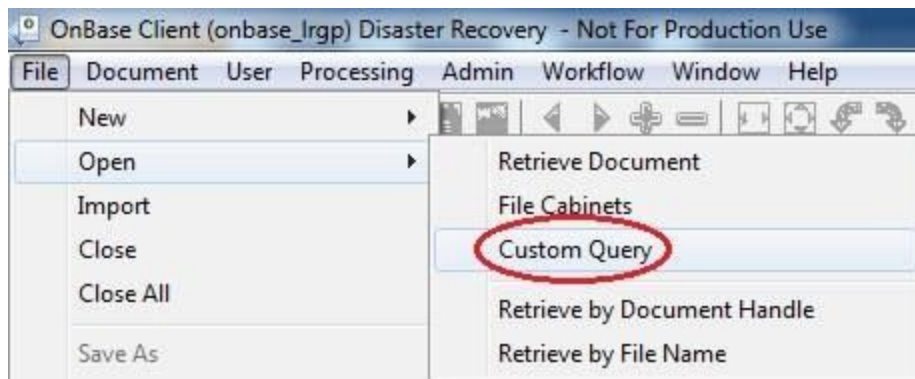
- 4) The workflow window will pop up as shown below.



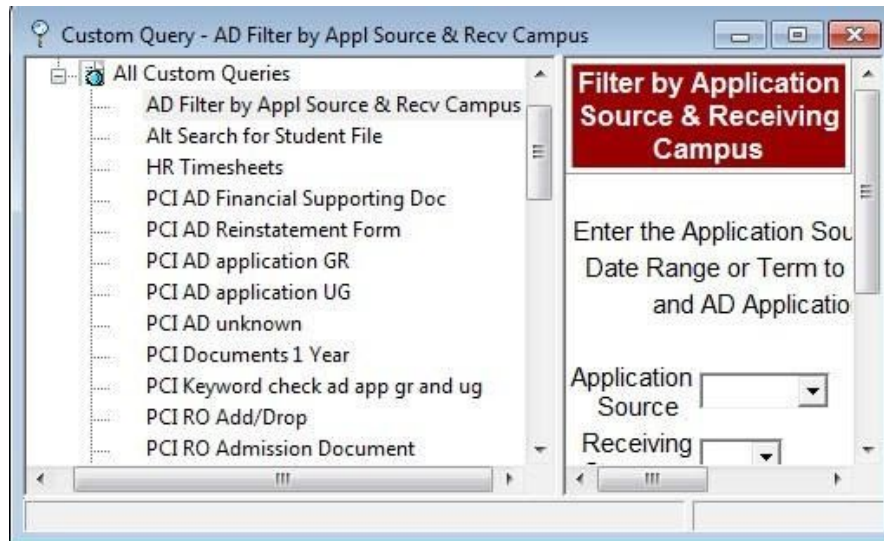
- 5) Find the appropriate document in the workflow and the document will be displaced on the right side. For further assistance, contact the OnBase administrator or trainer in your department.

## Part 9: Custom Query

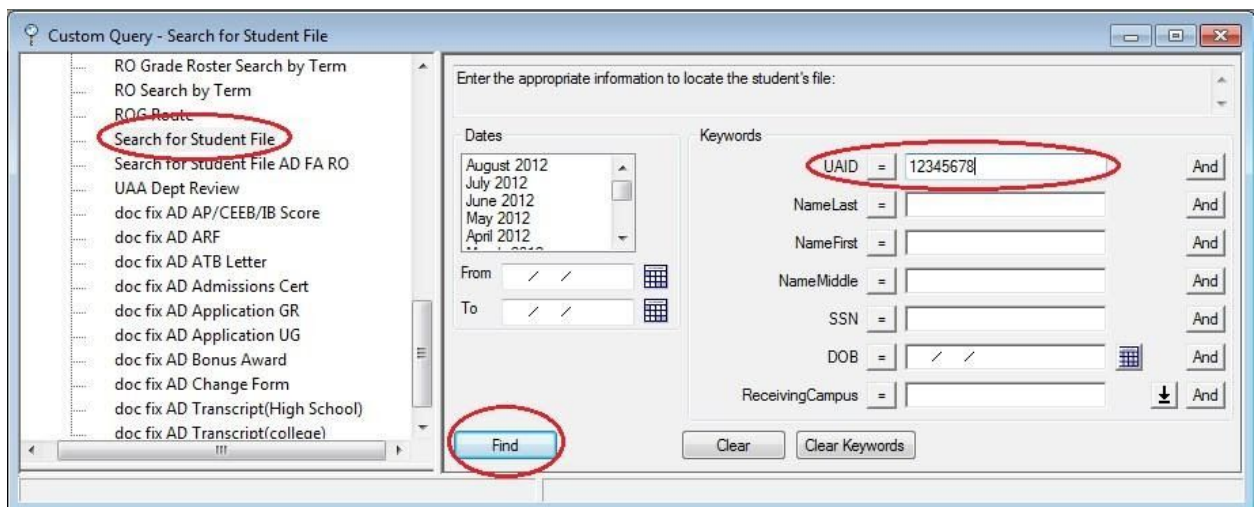
- 1) To open custom query go to File → Open → then click on Custom Query



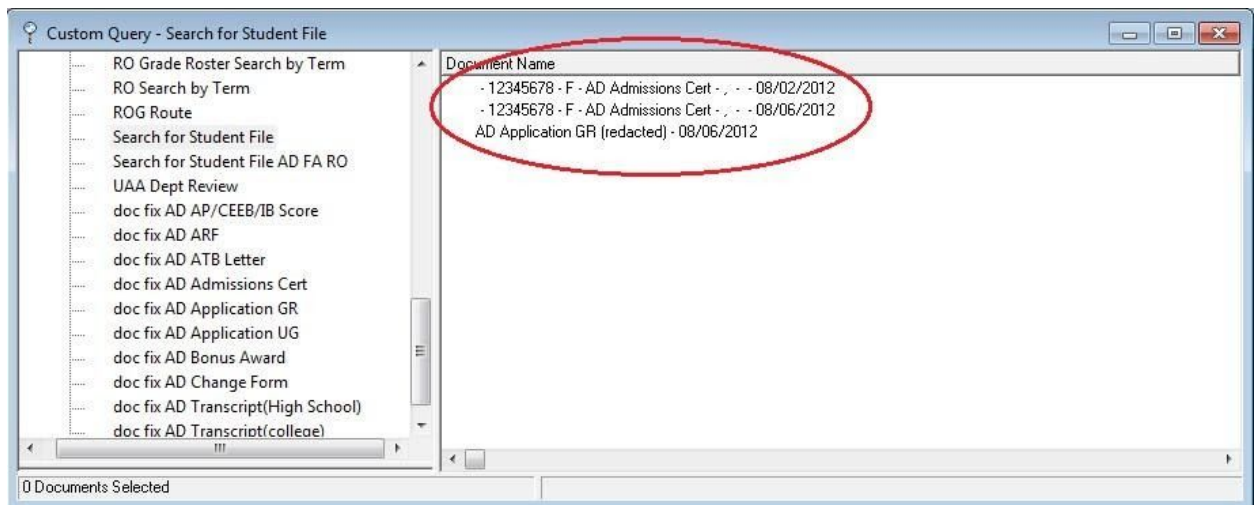
- 2) "Custom Query" window will open which is shown below.



3) Choose the appropriate custom query to search for the needed document



4) Enter the needed "Keywords" and click "Find"



- 5) The custom query will find all of the files associated with the inputted keywords.
- 6) In this case, Figure 20 found all files found under the UAID 12345678 no matter the location of the document.
- 7) Double-click on the document name to open the document.

## Part 10: Virtual Printer

### What is it?

The OnBase Hyland Virtual Printer is just like any regular printer except that it is a printer that is built into the computer.

### What does it do?

It **changes your documents format into the “appropriate” TIFF image** that is necessary for scanning into OnBase.

### How does it work?

It works like any other printer would.

Select “Hyland Software Virtual Printer” and click “Print”

### Where can I find my printed documents?

Go to “Start” □ “Computer” □ “Local Disk (C:) Drive” □ “OnBase Printer Spool”

Naming convention is random, so the user will have to rename the document in the Printer Spool.

## Part A: Basic Requirements

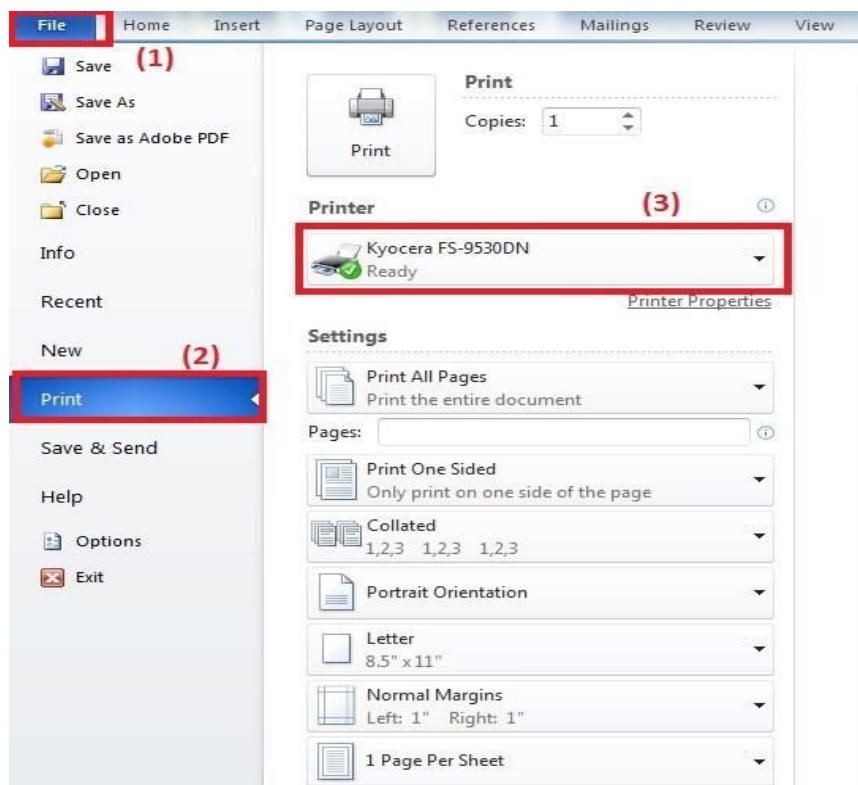
1. Make sure the OnBase Virtual Printer is installed on the user's computer.
  - Please contact your Office of Information Technology (OIT) help desk at 907-450-8300.
2. Have a document that is ready to print.
3. Being able to use the "print" function.

For example:

- Using "print" from a word Document.
- Using "print" from a PDF.
- Using "print" from an internet browser.
- ○ Etc. (Doesn't matter what option is used)

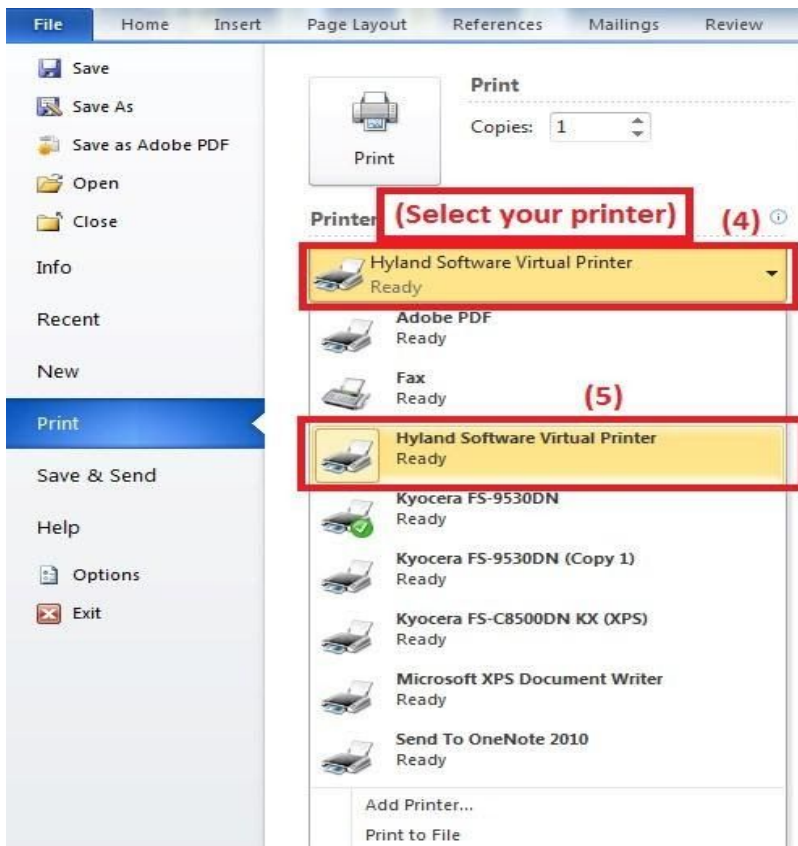
## Part B: Using Hyland Virtual Print Driver

1. Open up the "Print" Window.





## 2. Select printer - “Hyland Software Virtual Printer.”



## 3. All that is left to do is “Print.”

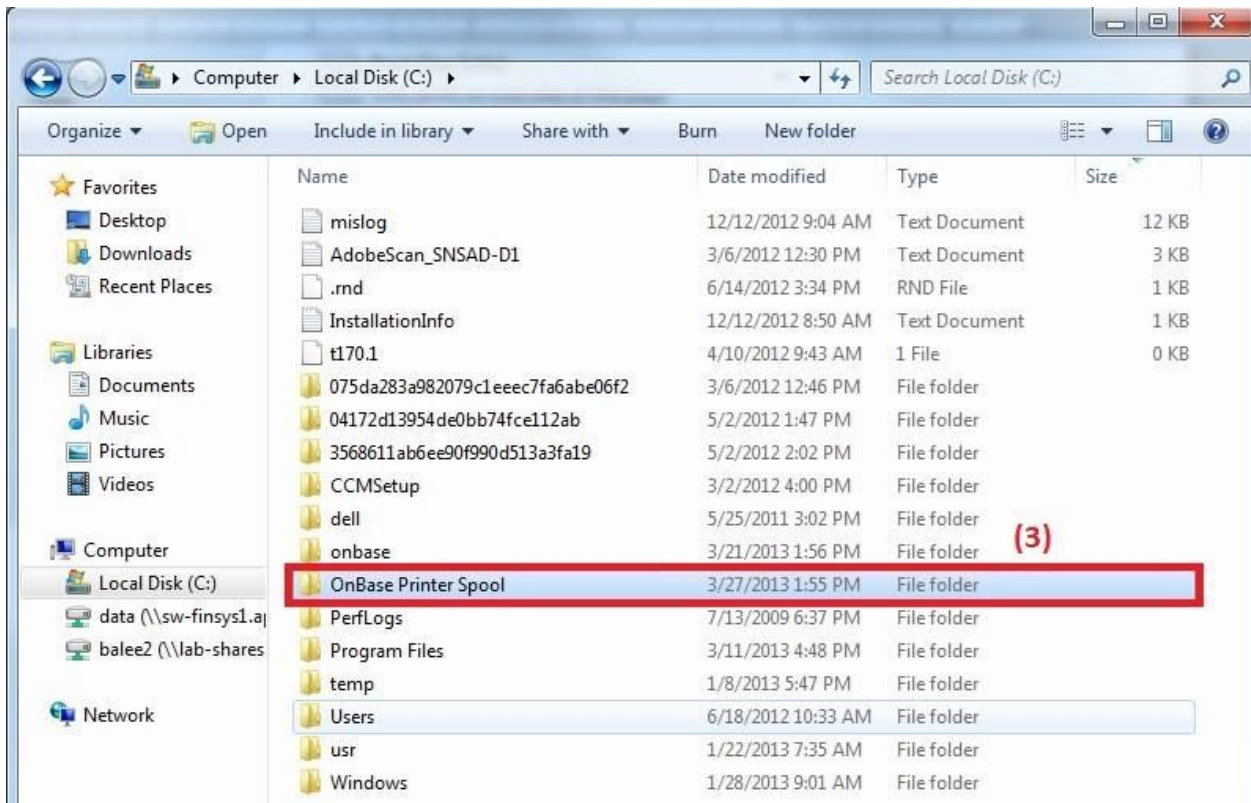
- a. Please wait about 10 – 15 minutes for the document to print fully, if there is about 10 or more pages.

## Part C: Finding the Printed Document

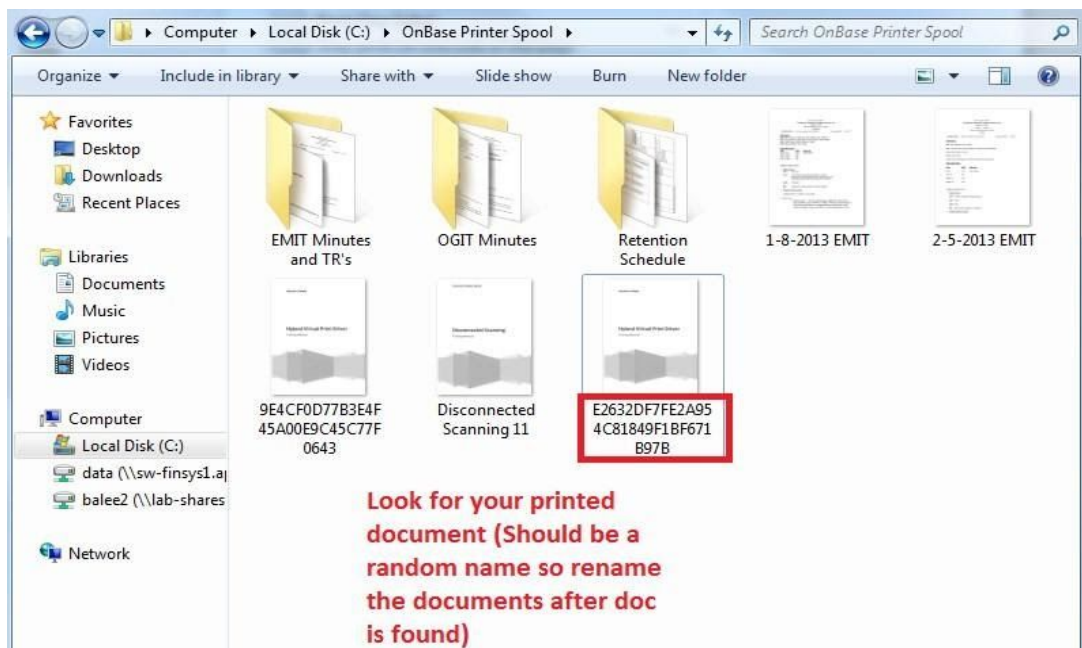
1. Go to “Start” □ “Computer”
2. After opening “Computer” □ “Local Disk (C:)”



3. Find "OnBase Printer Spool"



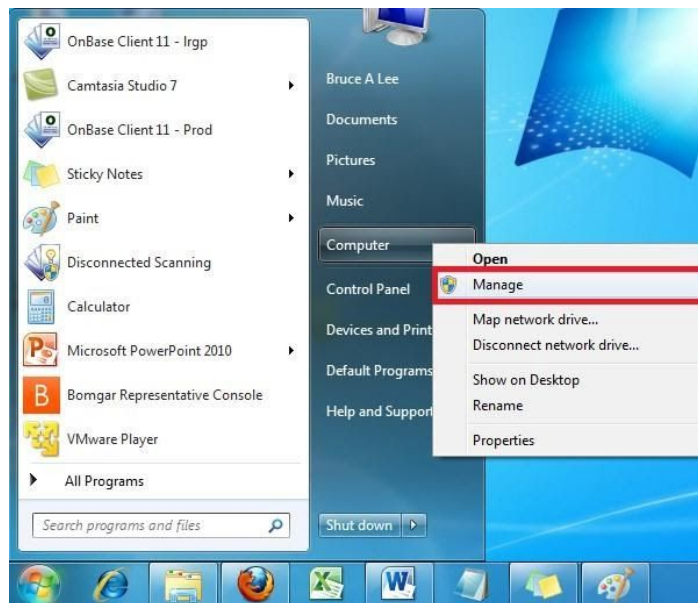
4. Find your document. It should be a randomly named document in TIFF format.



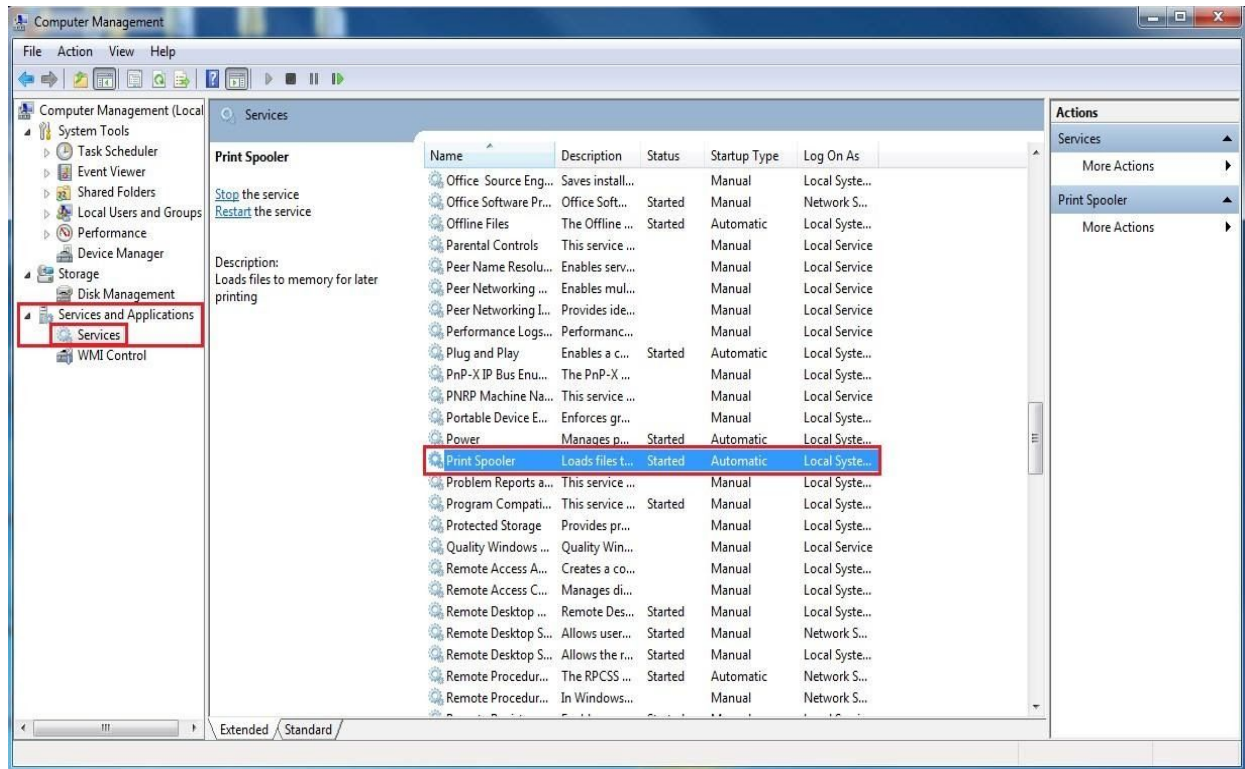


#### Part D: Some Notes/Troubleshooting to Consider\*\*\*

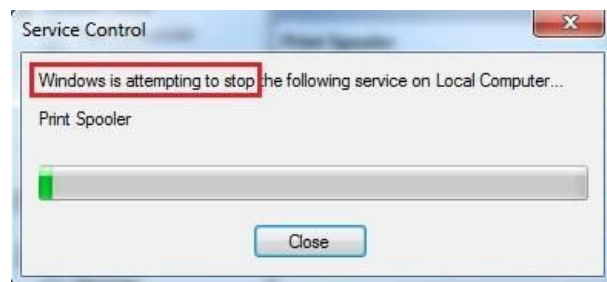
- When using the virtual printer, 2 or 3 pages will print fine without errors.
- Errors may occur when printing 18-20 pages.
  - The user may not print the full amount of pages in your document if the user does not wait long enough.
  - When this happens, print again and wait 15 minutes.
- Sometimes something that is called the “Print Spooler” will not function if the document is printed again while the older one is still printing.
  - This is what allows the user’s computer to use the print function.
  - ○ When it fails, go to “Start” □ Right-Click “Computer” □ Click on “Manage.”



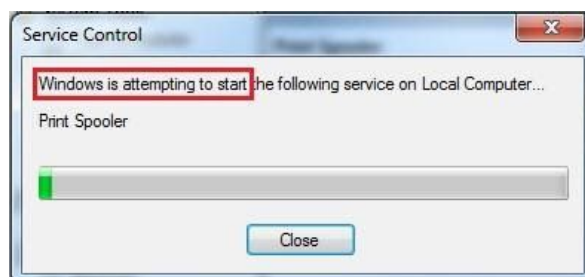
- Go to “Services” under “Services and Applications.”
- ○ Then scroll down to find “Print Spooler.”



- “Stop” the service



- “Start” the service



- Re-print the document and start the process all over till you have all of the pages printed. Continue to stop and start the process if it keeps failing.
- Remember to wait after printing so the computer has time to actually print all of the pages.

\*\*\*This is the only solution that was figured out when the printer does not work properly. Just keep stopping and starting the service and wait for your printed document to print.

\*\*\*The Virtual Printer will NOT show the user the progress in how long it takes for it to completely print.

## Part 11: Importing a Document

- 1) To import a document there are 2 ways of opening the import window
- 2) First way is to go to File → Import
- 3) Second way is to click on the upward green arrow as shown below.



4) The “Import Document” window should be opened

5) To import a document “browse” for the document needing to be imported.

**\*Note: For convenience and best practices, please convert your files to a TIFF image type before uploading the file onto OnBase**

One way is to use the Virtual Print Driver which converts your document into a TIFF file by using the “Print” feature and choosing “Hyland Software Virtual Printer” as your printer option.

Please contact your local IT staff to have it installed. There are extra resources on the RIM website on how to use the “Virtual Printer”. If you need training for this please email help desk (helpdesk@alaska.edu) and ask them to put in a ticket for training with OnBase.

6) Fill in the “Document Type Group” and “Document Type”

7) Do **NOT** change the “File Type” as this section will be automatically configured when the document browsed is chosen

– **WARNING: Changing the “File Type” will cause the file to be corrupted and will not be able to open it in OnBase**

8) Enter the appropriate keywords and fill in the **Red** areas as they are required fields

- 9) Click “Import” once everything is ready to be imported
- 10) The imported document may now be retrieved from Document Retrieval

As a final note, the OnBase program features an internal instruction book found under the “Help” tab on the top navigation bar. There are tons of OnBase features, so be sure to consult this help section whenever you are unsure if OnBase offers a feature. This section is also very good for questions on how the software works and how to use the features.