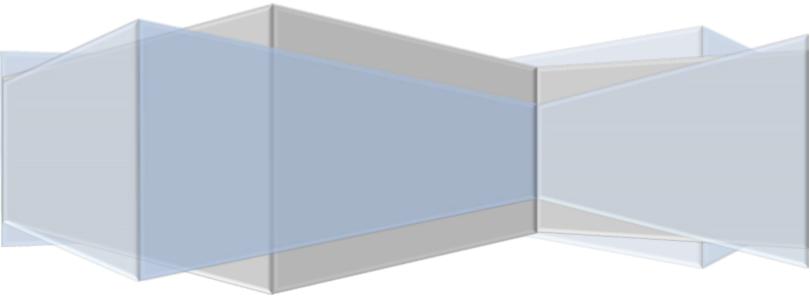
**University of Alaska Systems** 

# **OnBase 11 Thick Client** Training Manual



OnBase

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## 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

File	Document User	Processing Admin Workflow Window Help
N	ew	
0	pen	Retrieve Document
Ir	nport	File Cabinets
C	lose	Custom Query
C	lose All	Retrieve by Document Handle
S	ave As	Retrieve by File Name
R	e-Index	

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

File	Document	User F	Processing	Admin	Wo
E?			~ 1	MA NO	4

- 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.

P Document Retrieval	
Document Type Groups	Incol
ADAK Admissions	<u></u>
FIN Fund Accounting Audit	
Financial Aid	
Document Types	
AD Accupiacer Score	*
AD ACT Score	
AD Admissions Cert AD AP/CEEB/IB Score	
AD Application GR	
AD Application GR (redacted) AD Application UG	
AD Application UG (redacted)	-
(Dates)	(1)
From / / III To / /	
	and the second s
Today	day
$\frown$	
Keywords	
UAID = 12345678	And
Receivin = F	± And
Find Text Search	Note Search
Clear Keywords Clear All	

- 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

Doct	ument Search Result	>		
1000	Admissions Cert - U Admissions Cert - U		- 12345678 - F - AD Adr - 12345678 - F - AD Adr	nissions Cert 08/06/2012 nissions Cert - , 08/02/2012
•	m	•	•	•
1 Docum	ents Selected			

## 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

AD Adm • 00000 • Add / Modify Keywords AD Admissions Cert • 12345678 - F - AD Admissions Cert - , - • Document Date		ument Date
Document Date		0000120
Keywords UAID 12345678 dmissi ReceivingCampus F	ReceivingCampus F SSN NameLast NameFirst	

- 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

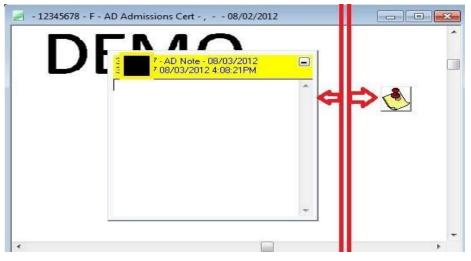
D	EN	Keywords Benditions History			
Document Hist og Date Log Tir		e Action Detai			
Workflow Queues	Workflow T	rancactions	-		
Life Cycle	Queue	Entry User Name	Entry Date	Exit User Name	Exit Date
AD Processing	- ADP Process	ing WorkFlow Timer Se	08/02/2012 1		nd konte

## Part 5: Using "Notes"

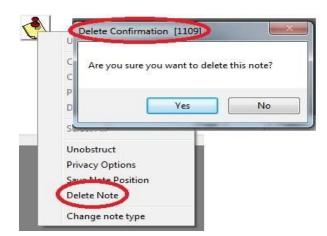
- 1) To add a note to your retrieved document right-click then go to "notes"
- 2) Then go to "Add note..."
- 3) A new window will pop up called "Add Note" with 2 options
- 4) Select the appropriate note and press ok

Overlay	Ctrl+0	
Notes	•	Add Note Ctrl+N
Redacted Image	•	View Notes
Print	Ctrl+P	Delete Note
Send To	• (	Add Note
Re-Index		
Delete Document		
Delete/Reorder Pages	Ctrl+D	AD Note RO Note
Navigate	•	
	р. В	
Navigate Scale Process		

- 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.

Of Course Town		ocument 1	
Search Term		ocument 1 Document 2	

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:

1	-	

Document 2 will show this icon:

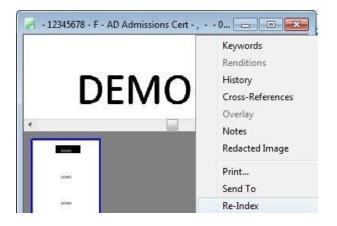
To view the staple, double click the staple icon. The staple window will display.

Staple Information	
View Document	
	6 -
Document 1	
*******STAPLED_TO*********	
ocument 2	
	-

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.

Re-Index Doc	ument	×		Re-Index Doc	ument		X
Document Type Group	<< ALL >>	-		Document Type Group	Admissions		•
Document Type	AD Admissions Cert	•		Document Type	AD Applicati	ion UG	•
File Type	Image File Format	-	>	File Type	Image File Fi	ormat	•
Document Date	08/02/2012			Document Date	08/02/2	012 🎹	
Keywords				Keywords			
	UAID 12345678				UAID	12345678	- A
Receivin	gCampus F	±			Term	2012	Ŧ
	SSN			Rece	WingCampus	F	Ŧ
1	NameLast			P	CI Compliant	NO	Ŧ
1	NameFirst			Applic	ation Source	ONLINE	Ŧ
Na	meMiddle		~		Level	UG	
	DOB / /	Ⅲ			UAScholar		Ŧ
Process	singStatus	±.			SSN		
Re-Index	Clear Keywords	Cancel		Re-Index		Clear Keywords	Cancel

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..."

fe Cycle	Queue	Assigned to Users
D Proceesing	AD <sup>IP</sup> Processing	apusers:orbasegrep:uaf
Open Quese	ons	Close
		Close Execute Workflow

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

Show Folder Locat	tions	
Workflow	•	Execute Workflow
Redaction Bitmap	s 🔸	Workflow Queues
	File Document User Processing	Admin
	File Document User Processing	Admin

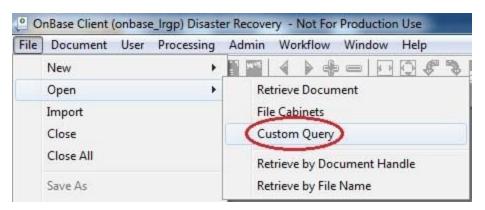
4) The workflow window will pop up as shown below.

⊌ <mark>⊜</mark> Workflow	
& E <b>C</b>   <b>0</b> ≤   + =	
AD Change of Major AD Conversion to RO Docs	*
Document Name	
	]
	·

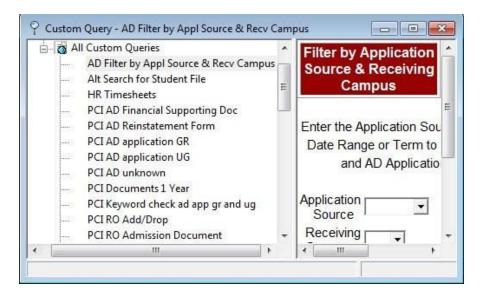
5) Find the appropriate document in the workflow and the document will be displaced on the right side. For further assistance, contact the OnBase administrator or trainer in your department.

## **Part 9: Custom Query**

1) To open custom query go to File [] Open [] then click on Custom Query



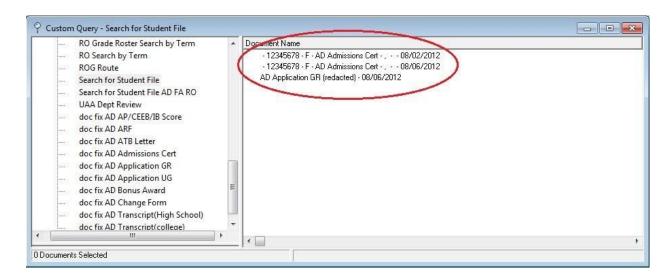
2) "Custom Query" window will open which is shown below.



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

	RO Grade Roster Search by Term RO Search by Term ROG Roote	Enter the appropriate information to	o locate the student's file:	
	Search for Student File	Dates	Keywords	
	Search for student File AD FA RO	August 2012	UAID = 12345678	$\supset$
0.25	UAA Dept Review	July 2012		
2233	doc fix AD AP/CEEB/IB Score	June 2012 May 2012	NameLast _=	
	doc fix AD ARF	April 2012 👻	NameFirst =	
	doc fix AD ATB Letter			
	doc fix AD Admissions Cert	From / /	NameMiddle =	
2239	doc fix AD Application GR	To // 🗰	SSN =	
wts:	doc fix AD Application UG			
	doc fix AD Bonus Award		DOB = / /	#
	doc fix AD Change Form		ReceivingCampus =	±
228	doc fix AD Transcript(High School)			<u> </u>
	doc fix AD Transcript(college)	Find	Clear Keywords	
_	• III	Find	Clear Reywords	

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**

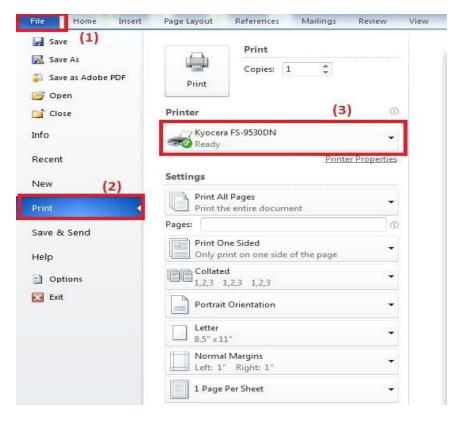
- 1. Make sure the OnBase Virtual Printer is installed on the user's computer.
  - Please contact your Office of Information Technology (OIT) help desk at 907-450-8300.
- 2. Have a document that is ready to print.
- 3. Being able to use the "print" function.

For example:

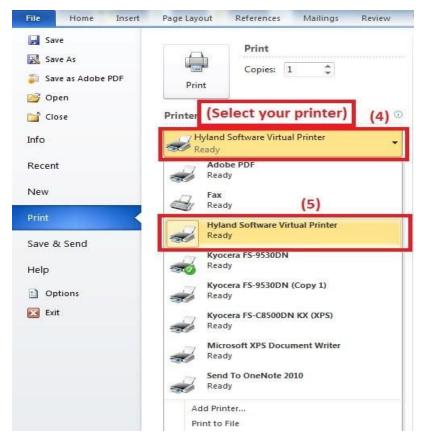
- Using "print" from a word Document.
- Using "print" from a PDF.
- Using "print" from an internet browser.
- • Etc. (Doesn't matter what option is used)

#### Part B: Using Hyland Virtual Print Driver

1. Open up the "Print" Window.



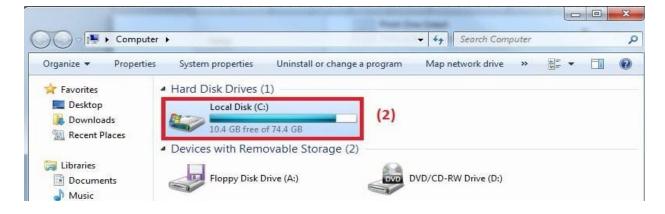
2. Select printer - "Hyland Software Virtual Printer."



- 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**

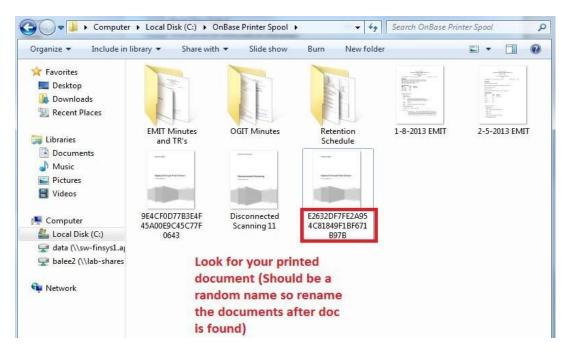
- 1. Go to "Start" [] "Computer"
- 2. After opening "Computer" [] "Local Disk (C:)"



#### 3. Find "OnBase Printer Spool"

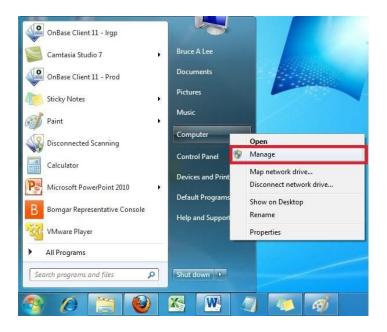
🖉 🗢 📥 🕨 Computer	► Local Disk (C:) ►	▼   <sup>4</sup> y	Search Local Disk (C:)		
Organize 👻 🛛 🛜 Open	Include in library 🔹 Share with 💌	Burn New folder		•	
🔆 Favorites	Name	Date modified	Туре	Size	
E Desktop	📄 mislog	12/12/2012 9:04 AM	Text Document	12 KB	
📕 Downloads	AdobeScan_SNSAD-D1	3/6/2012 12:30 PM	Text Document	3 KB	
🔛 Recent Places	🗋 .rnd	6/14/2012 3:34 PM	RND File	1 KB	
	📋 InstallationInfo	12/12/2012 8:50 AM	Text Document	1 KB	
词 Libraries	t170.1	4/10/2012 9:43 AM	1 File	0 KB	
Documents	ル 075da283a982079c1eeec7fa6abe06f2	3/6/2012 12:46 PM	File folder		
J Music	퉬 04172d13954de0bb74fce112ab	5/2/2012 1:47 PM	File folder		
E Pictures	🕕 3568611ab6ee90f990d513a3fa19	5/2/2012 2:02 PM	File folder		
Videos	📕 CCMSetup	3/2/2012 4:00 PM	File folder		
	🎍 dell	5/25/2011 3:02 PM	File folder		
🖳 Computer	📕 onbase	3/21/2013 1:56 PM	File folder (3)		
🟭 Local Disk (C:)	🌛 OnBase Printer Spool	3/27/2013 1:55 PM	File folder		
🖵 data (\\sw-finsys1.aj	🎍 PerfLogs	7/13/2009 6:37 PM	File folder		Ī
🚽 balee2 (\\lab-shares	퉬 Program Files	3/11/2013 4:48 PM	File folder		
	🌽 temp	1/8/2013 5:47 PM	File folder		
🗣 Network	퉬 Users	6/18/2012 10:33 AM	File folder		
	퉬 usr	1/22/2013 7:35 AM	File folder		
	퉬 Windows	1/28/2013 9:01 AM	File folder		

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."



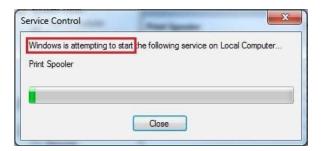
- o Go to "Services" under "Services and Applications."
- • Then scroll down to find "Print Spooler."

	? 📊 🕨 🔲 🕪								
Computer Management (Local System Tools	O Services							Actions	
Task Scheduler	Print Spooler	Name	Description	Status	Startup Type	Log On As		Services	
Event Viewer		Grice Source Eng			Manual	Local Syste		More Actions	
§ 3 Shared Folders	Stop the service	Office Software Pr		Started	Manual	Network S		Print Spooler	
Local Users and Groups	Restart the service	Offline Files	The Offline		Automatic	Local Syste		More Actions	
Non-state Performance		Parental Controls	This service	ounced	Manual	Local Service		Wore Actions	
Device Manager	Description:	Reer Name Resolu			Manual	Local Service			
Storage Disk Management	Loads files to memory for later	Reer Networking			Manual	Local Service			
Services and Applications	printing	Reer Networking I			Manual	Local Service			
Services		Performance Logs			Manual	Local Service			
WMI Control		Ring and Play	Enables a c	Started	Automatic	Local Syste			
		RnP-X IP Bus Enu	The PnP-X		Manual	Local Syste			
		PNRP Machine Na	This service		Manual	Local Service			
		🔍 Portable Device E	Enforces gr		Manual	Local Syste			
		A Power	Manages p	Started	Automatic	Local Syste	E		
		🙀 Print Spooler	Loads files t	Started	Automatic	Local Syste			
		😪 Problem Reports a	This service		Manual	Local Syste			
		鵒 Program Compati	This service	Started	Manual	Local Syste			
		🔅 Protected Storage	Provides pr		Manual	Local Syste			
		🔍 Quality Windows	Quality Win		Manual	Local Service			
		🧠 Remote Access A	Creates a co		Manual	Local Syste			
		🥋 Remote Access C	-		Manual	Local Syste			
		🥋 Remote Desktop		Started	Manual	Local Syste			
		Remote Desktop S		Started	Manual	Network S			
		🤐 Remote Desktop S			Manual	Local Syste			
		🧟 Remote Procedur		Started	Automatic	Network S			
		🧟 Remote Procedur	In Windows		Manual	Network S	-		

o "Stop" the service

ndows is attempting	to stop the following service on Local Computer
it Spooler	

• "Start" the service



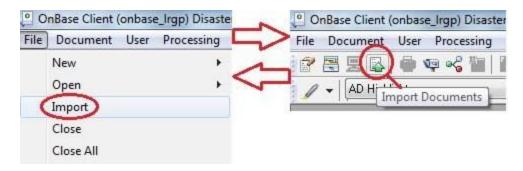
- Re-print the document and start the process all over till you have all of the pages printed.
  Continue to stop and start the process if it keeps failing.
- Remember to wait after printing so the computer has time to actually print all of the pages.

\*\*\*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.



File Path	C:\Users Desktop\Importing Folder\DEMO.tiff	Browse
	Append Page To Existing Document	
-	Delete File After Import 🛛 Initiate Workflow	
ocument Type Group		
Document Type	AD Application GR (redacted)	
File Type	Image File Format	
an mont Date	08/06/2012	e for Full-Page OCR
Keywords		
$\sim$	UAID 12345678	
$\sim$	sceivingCampus F	t
$\sim$	eceivingCampus F	
$\sim$	sceivingCampus F	±
$\sim$	eceivingCampus F	
$\sim$	eceivingCampus F Level Term	±

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.