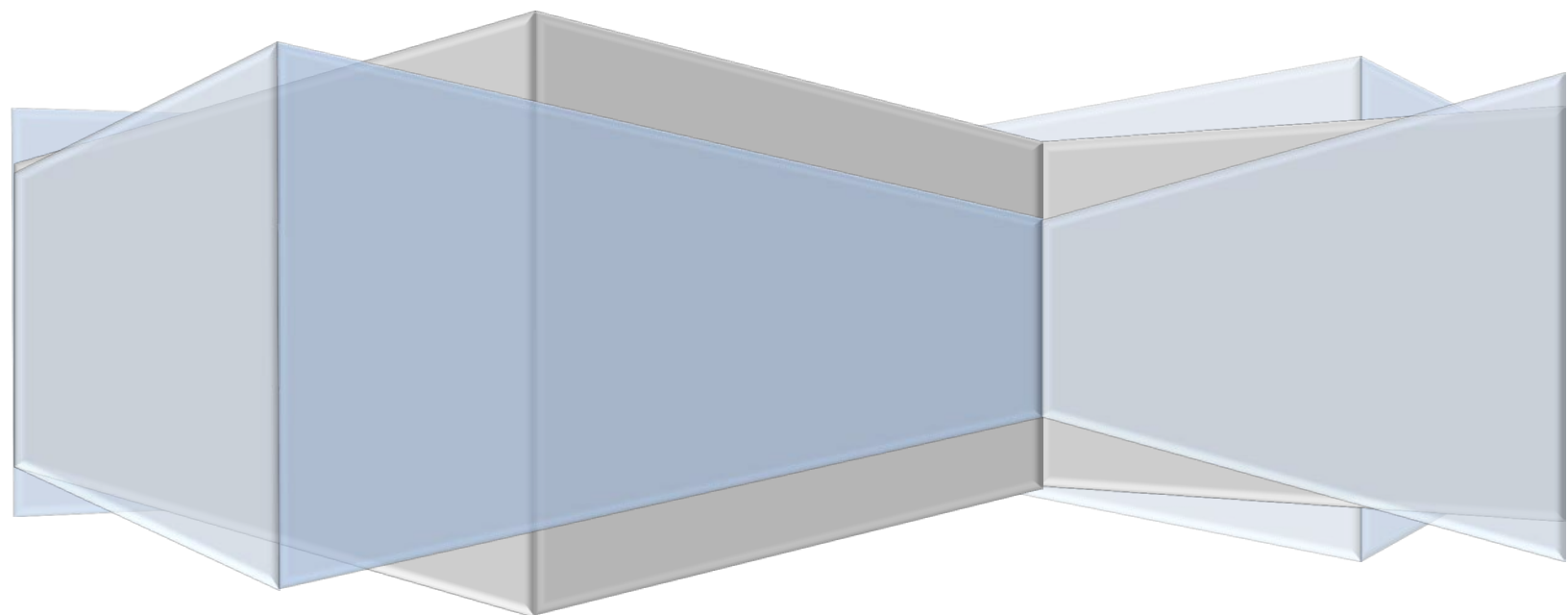


University of Alaska Systems

OnBase Thin Client HTML

Training Manual

Bruce A Lee



OnBase Thin Client HTML

Contents

Part 1: Logging Into OnBase.....	1
Part 2: Document Retrieval.....	2
Part 3: Modifying Keywords.....	5
Part 4: Using “History”	6
Part 5: Using “Notes”	7
Part 6: Re-indexing.....	9
Part 7: Workflow Query	10
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	22

Part 1: Logging Into OnBase

- 1) To login to OnBase 11 Thin Client HTML, first open up either Internet Explorer (Recommended) or Firefox.

Note: Ask your OnBase administrator what version browser to use due to compatibility issues

- 2) This URL is to login to LRGP: <https://sw-redhead.apps.ad.alaska.edu/AppNet/Login.aspx>
- 3) There are different URLs for PROD and Test and Mac users also have its own URLs.
- 4) **First Line:** Enter your UA ID, 3##### (30 million #)
- 5) **Second Line:** Enter your Edir/Elmo password (*Same as UA Email/Blackboard Password*)
- 6) Choose "HTML", and click "Login"



Figure 1: Log in window

Part 2: Document Retrieval

- 1) Once logged into OnBase Thin Client HTML, the user will be able to see Document Retrieval from the start as shown in Figure 2 below.

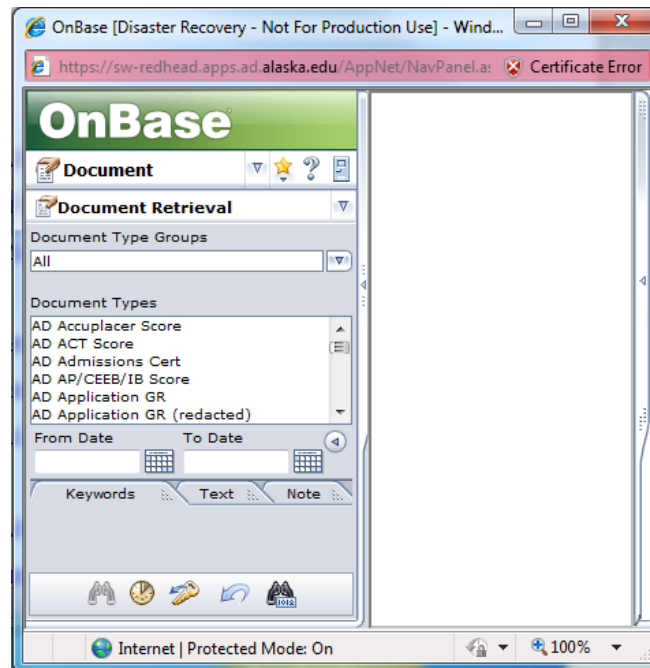


Figure 2: Initial page after logging into OnBase

- 2) To retrieve a document, make sure that “Document” and “Document Retrieval” is selected. (Shown in Figure 3, the red circled areas)
- 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 pull up every document in OnBase)

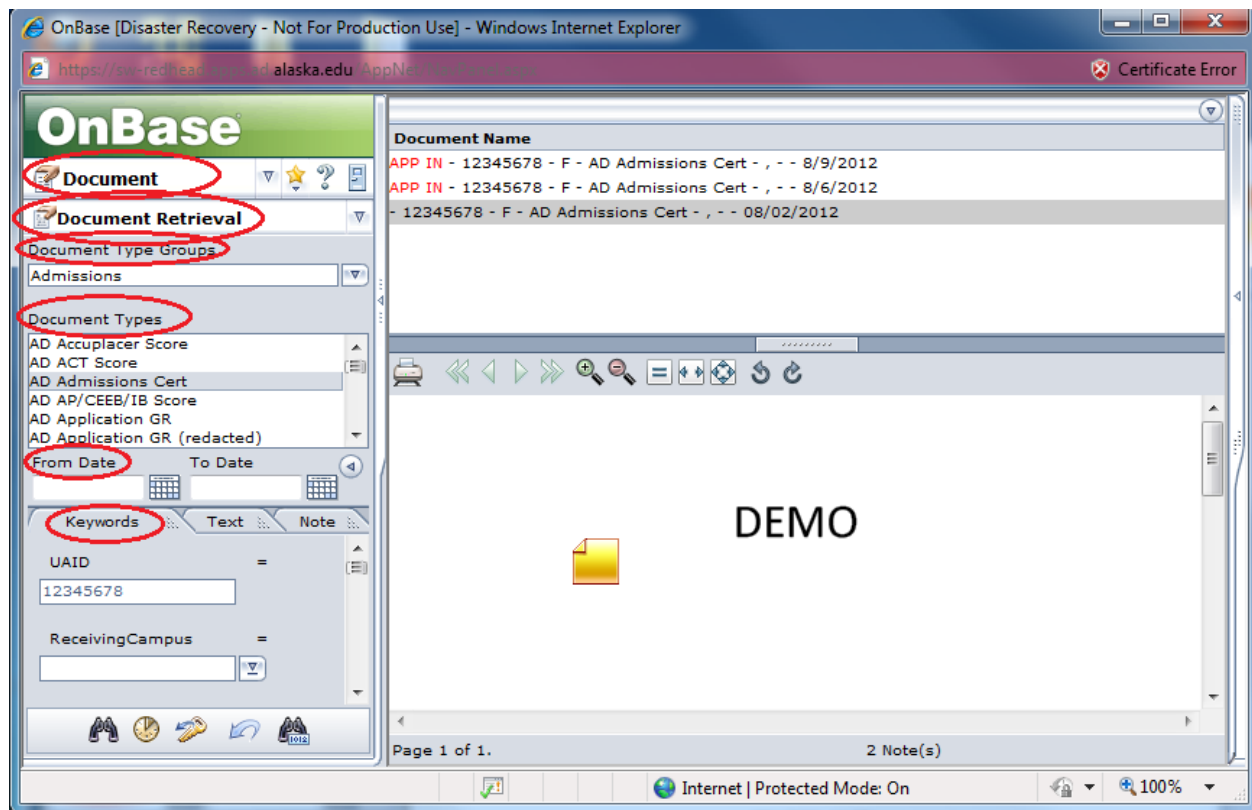


Figure 3: Document Type Groups, Document Types, Dates, Keywords, Searching, and Opening a Document

- 7) Click "Find" (The binoculars on the left)
- 8) The search result will pop up in the upper right hand corner (Shown in Figure 3)
- 9) Double-click the document to open (Shown in Figure 3 in the middle with DEMO)

Only an Example from Thick Client, but applies to Thin Client as well.

10) To use the * search, type in any letter or number necessary to the keyword section and put the * sign at the end and press find.

11) This will allow the user to find all the following searches that have for example

- a. LIND* will search everything that includes LIND in the keyword.
- b. Example is shown below.

Document Type Groups

- Admissions
- FIN Fund Accounting Audit
- Financial Aid
- Human Resources
- International
- Records and Information Management
- Records and Information Management - Imaging

Document Types

- HR Bkgrd Check Release Stand
- HR Ethics_Nepotism
- HR Ethics_Outside_Employment
- HR IS
- HR Injury_Illness
- HR Termed File
- HR Time Sheets
- HR Union Dues
- HR W-2
- HR W-4

Dates

From / / To / /

Today Today

Keywords

UAID = And

ReceivingC... = And

IS Date = And

DOB = And

NameLast = LIND* And

NameFirst = And

Document Search Results

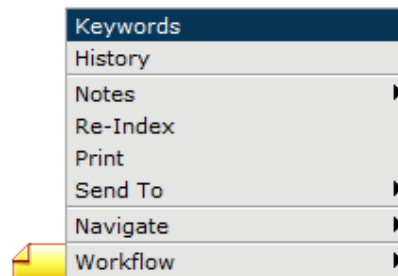
- HR IS - NameLast: LIND*
- HR IS - NameLast: LIN*
- HR IS - NameLast: LI*

-LINDSLEY, K	- 12/05/2011
-LINDEMAN, J	- 12/05/2011
-LINDEEN, T	- 12/05/2011
-LIND, S	- 10/19/2011
-LIND, S	- 10/04/2011
-LINDSEY, H	2/21/2011
-LIND JR, R	02/18/2011
-LIND JR, R	- 09/28/2010
-LIND, N	- 09/14/2010
-LIND, T	- 08/27/2010
-LINDOFF, C	- 08/27/2010
-LINDAHL, M	08/27/2010
-LINDSEY, S	- 08/27/2010
-LIND, M	- 08/27/2010
-LINDSEY, R	- 08/27/2010
-LINDSEY, R	- 08/25/2010
-LINDSEY, S	- 07/16/2010
-LINDSEY, S	- 07/16/2010
-LINDHAG, J	37/12/2010
-LINDLEY, MI	- 07/12/2010
-LINDGREN, MI	07/12/2010
-LINDBERG, M	- 06/23/2010
-LINDBERG, M	06/23/2010
-LINDSEY, G	
-LINDQUIST, C	- 06/17/2010

Keyword Finding Using Asterisks *

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



DEMO

Figure 5: Getting to Add / Modify Keywords window

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

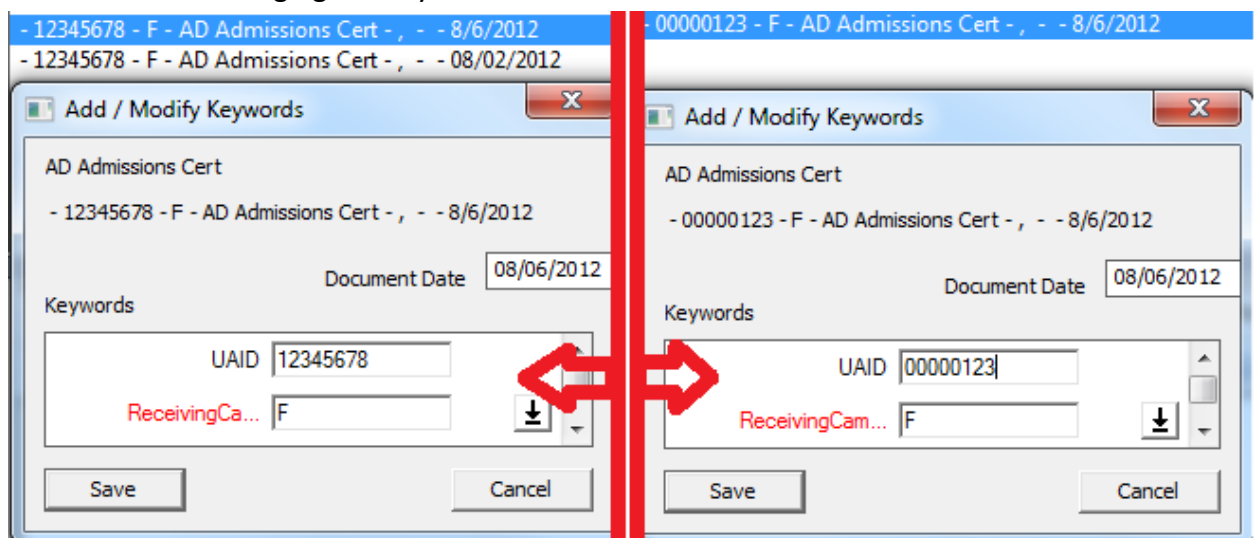
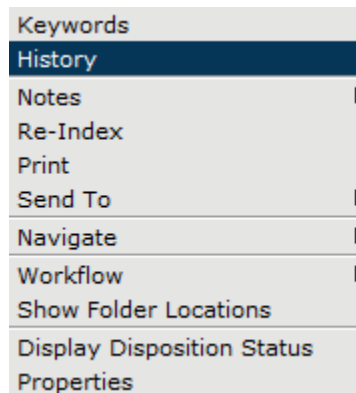


Figure 6: Before (left) and After (right) keyword change

- 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



Document History for - 12345678 - F - AD Admissions Cert - , - - 08/02/2012 - Windows Intern...

<https://sw-redhead.apps.ad.alaska.edu/AppNet/contextmenu/DocumentHistory.aspx> Certificate Error

User	Date	Message
	Friday, April 26, 2013 9:52:42 AM	Viewed keywords on document 3678699 (- 12345678 - F - AD Admissions Cert - , - - 08/02/2012)
	Friday, April 26, 2013 9:37:27 AM	Modified Note 509393 (AD Redaction) on (3678699) ' - 12345678 - F - AD Admissions Cert - , - - 08/02/2012'
	Friday, April 26, 2013 9:37:14 AM	Viewed (3678699) ' - 12345678 - F - AD Admissions Cert - , - - 08/02/2012'
	Wednesday, April 24, 2013 3:36:32 PM	Created Note 509393 (AD Redaction) on (3678699) ' - 12345678 - F - AD Admissions Cert - , - - 08/02/2012'

Workflow Queues... Workflow Transactions...

Life Cycle	Queue	Entry Time	Exit Time	Entry User	Exit User
AD Processing	ADP Processing	8/2/2012 4:30:21 PM		WorkFlow Timer Service	
AD Processing	ADP DCD	8/2/2012 4:30:20 PM	8/2/2012 4:30:21 PM	WorkFlow Timer Service	WorkFlow Timer Service
AD Processing	ADP Initial	8/2/2012 4:25:33 PM	8/2/2012 4:30:20 PM		WorkFlow Timer Service

Done Internet | Protected Mode: On 100%

Figure 7: Accessing “Document History”

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

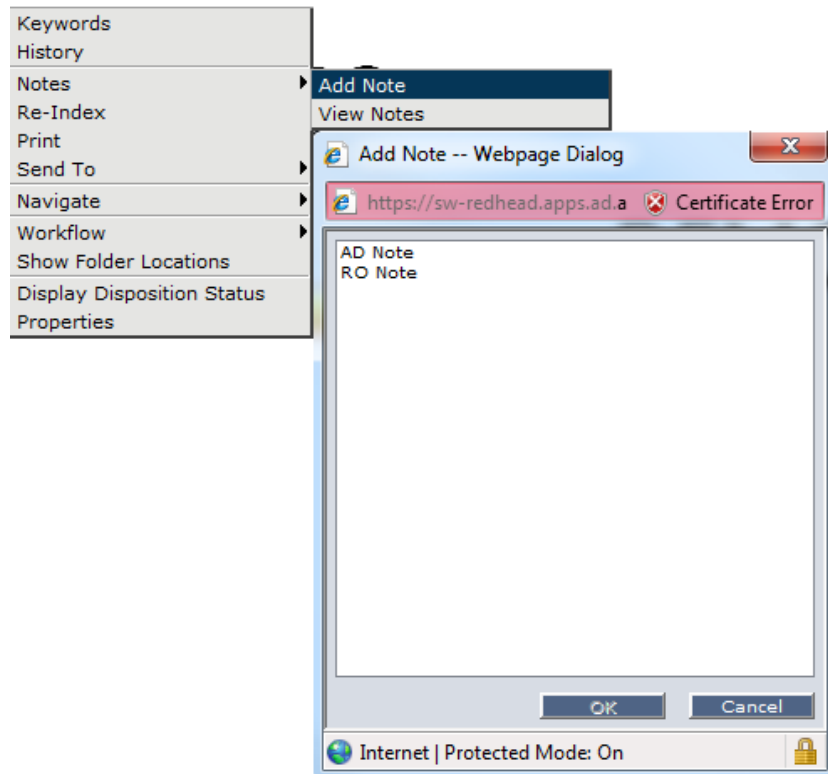


Figure 8: How to Add Note

- 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 and maximize the note by double clicking on the yellow part of the note or the sticky note on the top left.

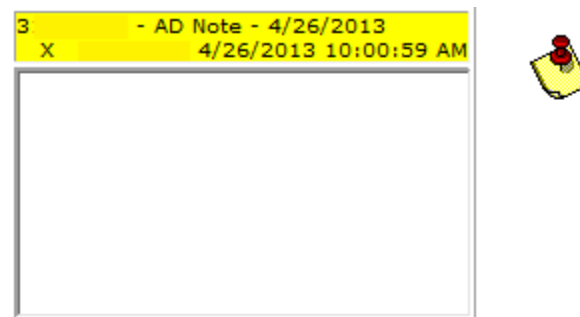


Figure 9: When a note is newly added

- 7) To delete a note:
- a. First by going to notes then view notes as shown below. Then Delete Notes.

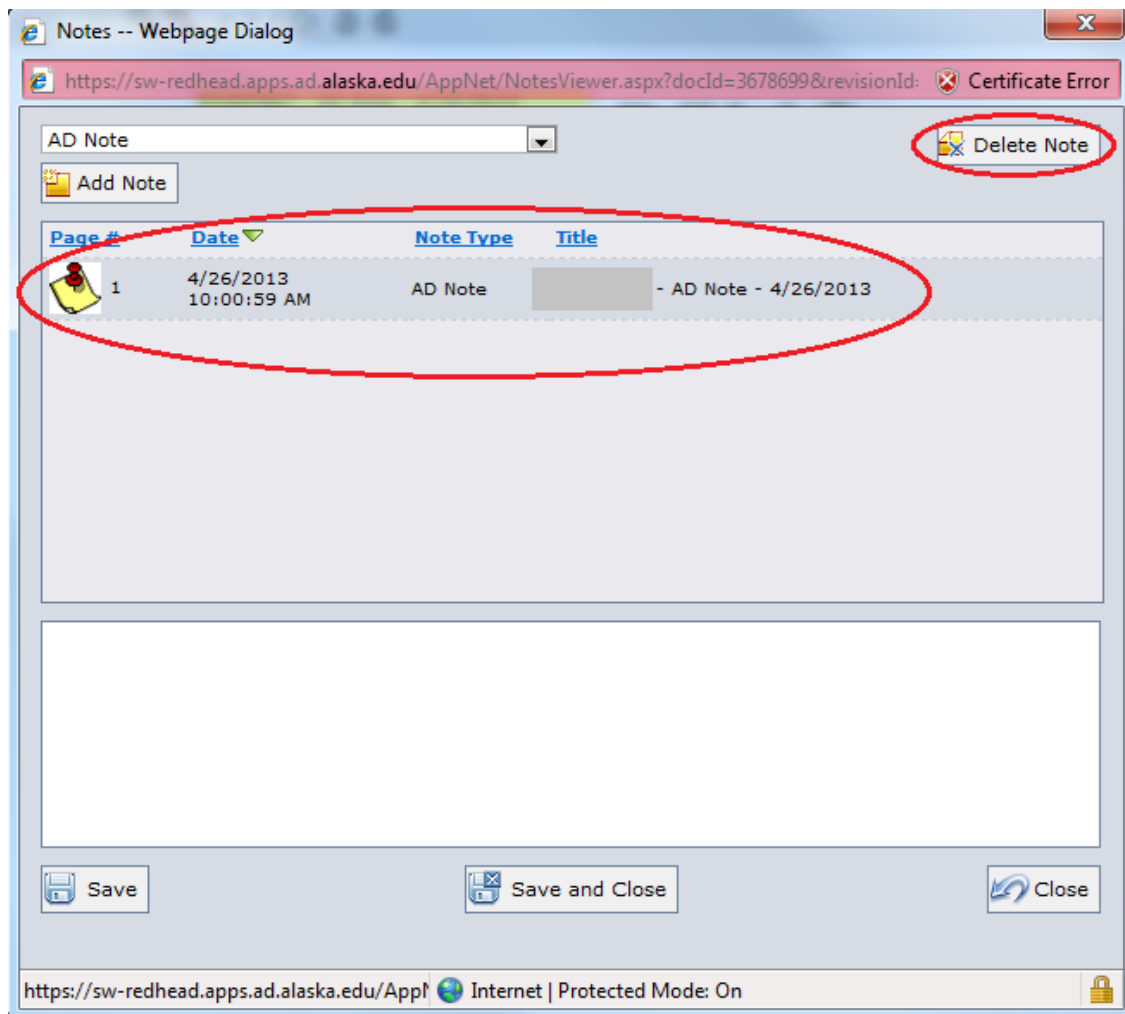
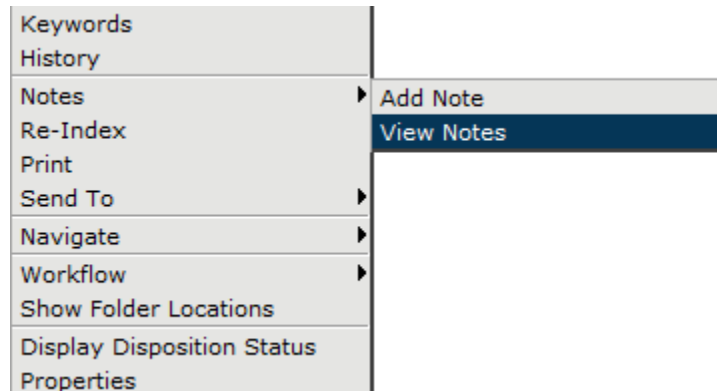


Figure 10: Deleting Notes

Part 6: Re-indexing

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

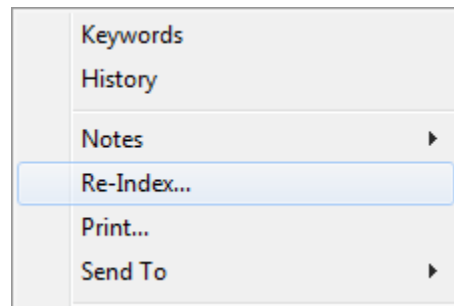


Figure 11: Opening Re-Index

- 2) A window like Figure 12 (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.

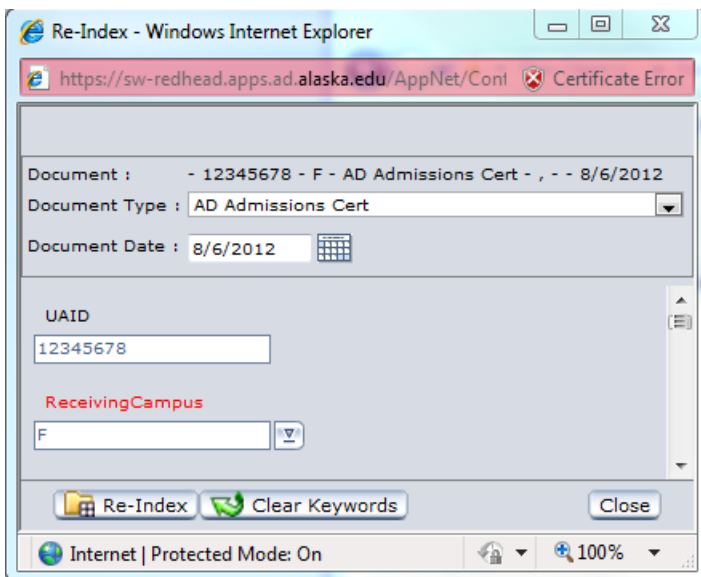


Figure 12: Re-Index Document Window

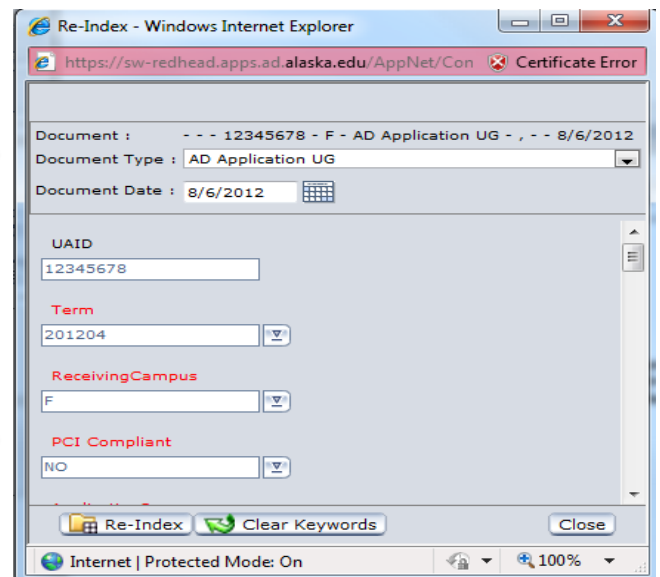


Figure 13: Re-Indexing Result

- 4) Fill in the required Keywords in red and other areas if need to be changed
- 5) Click “Re-Index” once everything looks good
- 6) The document can now be searched under the newly changed Keywords and Doc Type

Part 7: Workflow Query

There is no option for accessing Workflow Query.

Part 8: Workflow

- 1) To open workflow click on the “Document” Drop down box or whichever is currently selected and choose “Workflow” as shown in Figure 14.

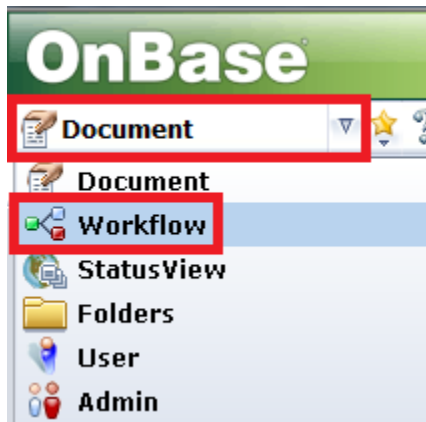


Figure 14: Opening the Workflow Window

- 2) The Workflow window will pop up as shown below in Figure 15.

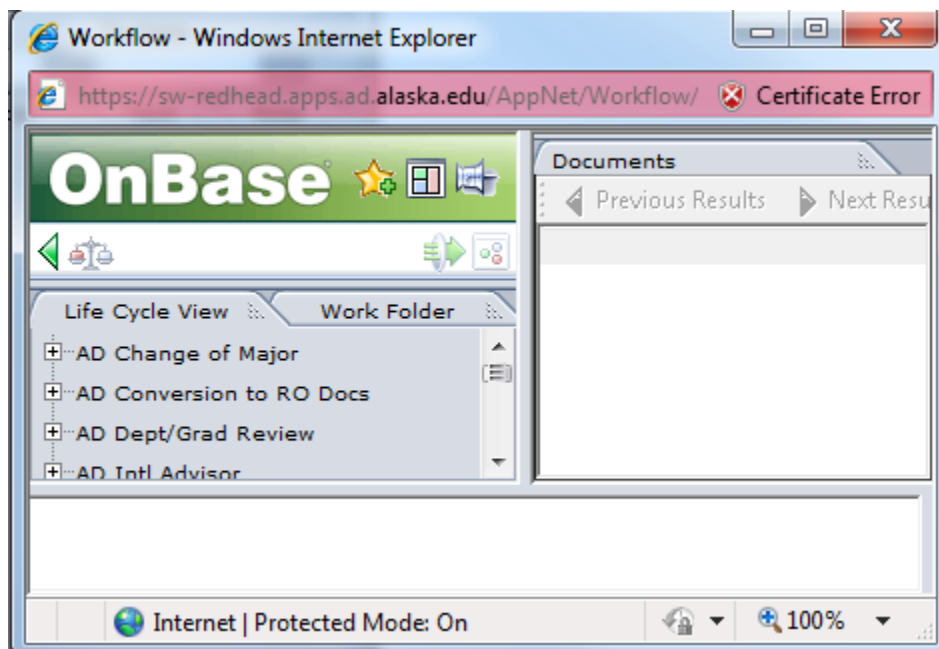


Figure 15: Workflow Window

- 3) Find the appropriate document in the workflow and the document will be displaced in the lower window. For further assistance, contact the OnBase administrator or trainer in your department.

Part 9: Custom Query

- 1) To open custom query click on the “Document Retrieval” drop down box or whichever is currently selected and choose “Custom Queries” as shown in Figure 16.

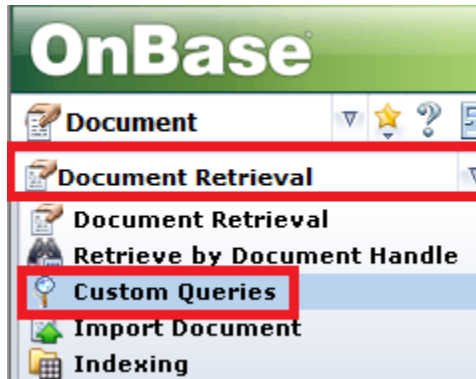


Figure 16: Opening Custom Query

- 2) "Custom Query" window will open which is shown below on Figure 17.

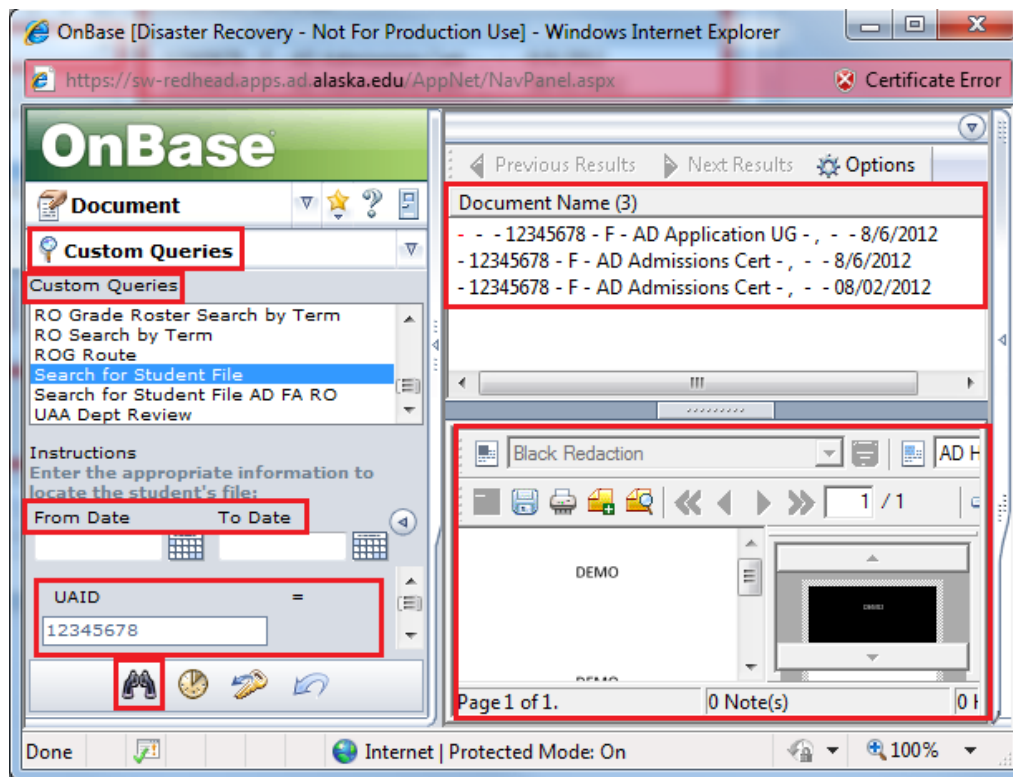


Figure 17: Custom Query Window

Shown in Figure 17 for Steps 3 – 7

- 3) Choose the appropriate custom query to search for the needed document.
- 4) Enter the needed "Keywords" and click "Find" (The binoculars).
- 5) The custom query will find all of the files associated with the inputted keywords.
- 6) In this case custom query 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.

Basic Requirements

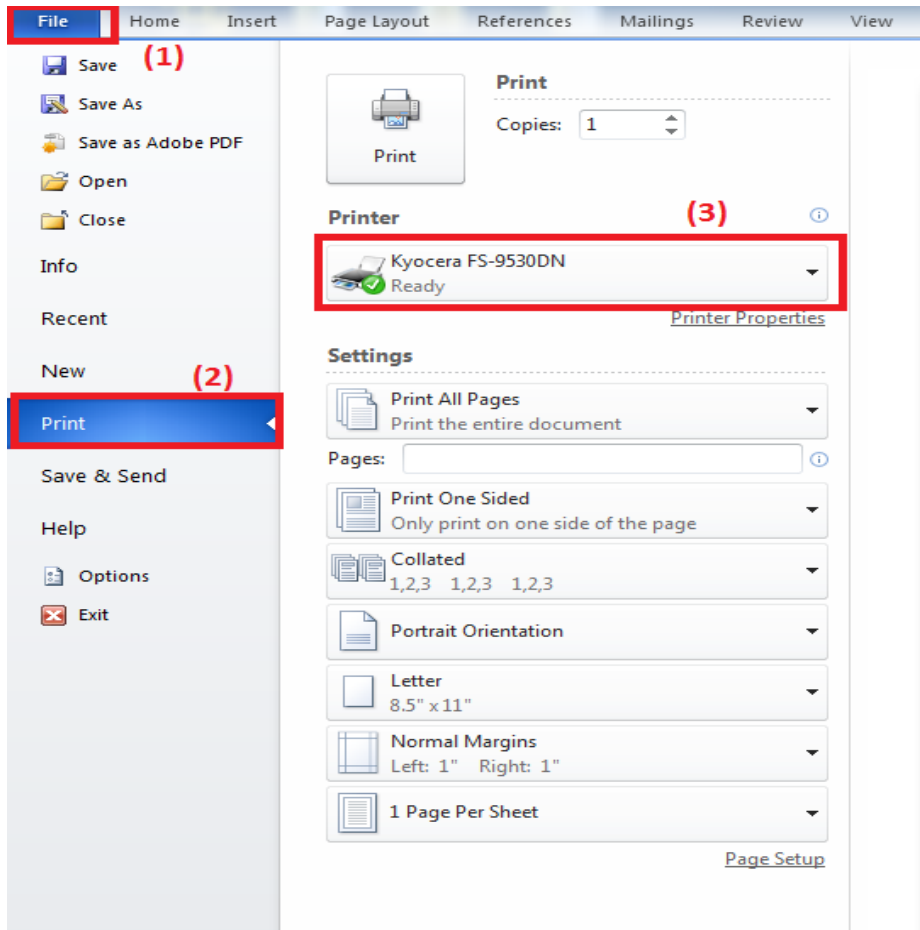
1. Make sure the OnBase Virtual Printer is installed on the user’s computer.
 - Please contact your Office of Information Technology (OIT) help desk at 907-450-8300.
2. Have a document that is ready to print.
3. Being able to use the “print” function.

For example:

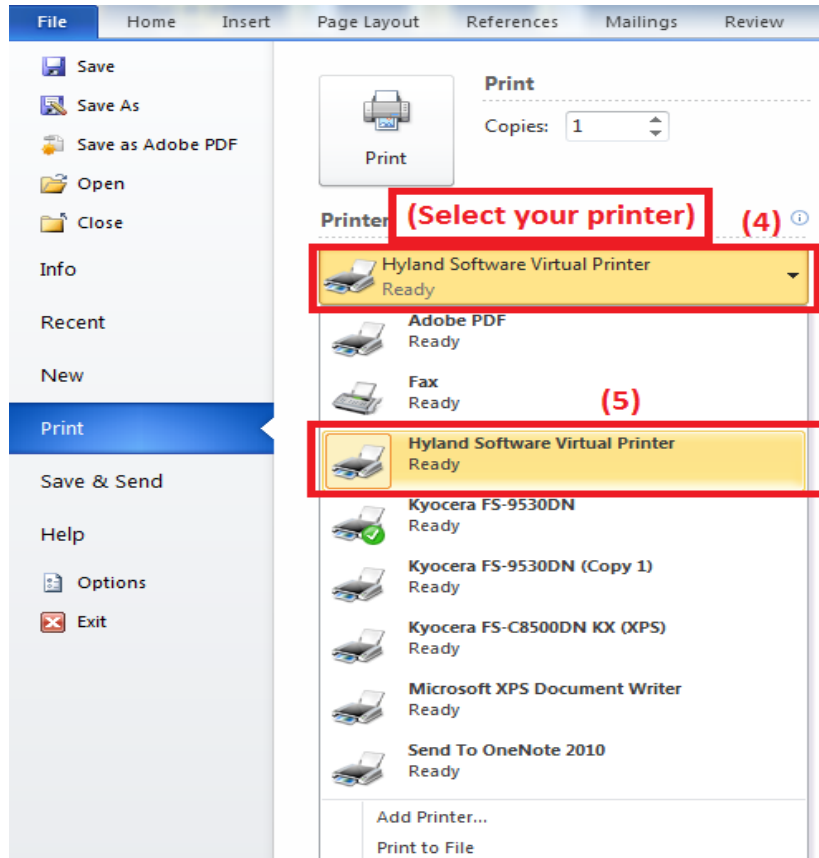
- Using “print” from a word Document.
- Using “print” from a PDF.
- Using “print” from an internet browser.
- Etc. (Doesn’t matter what option is used)

Using Hyland Virtual Print Driver

1. Open up the "Print" Window.

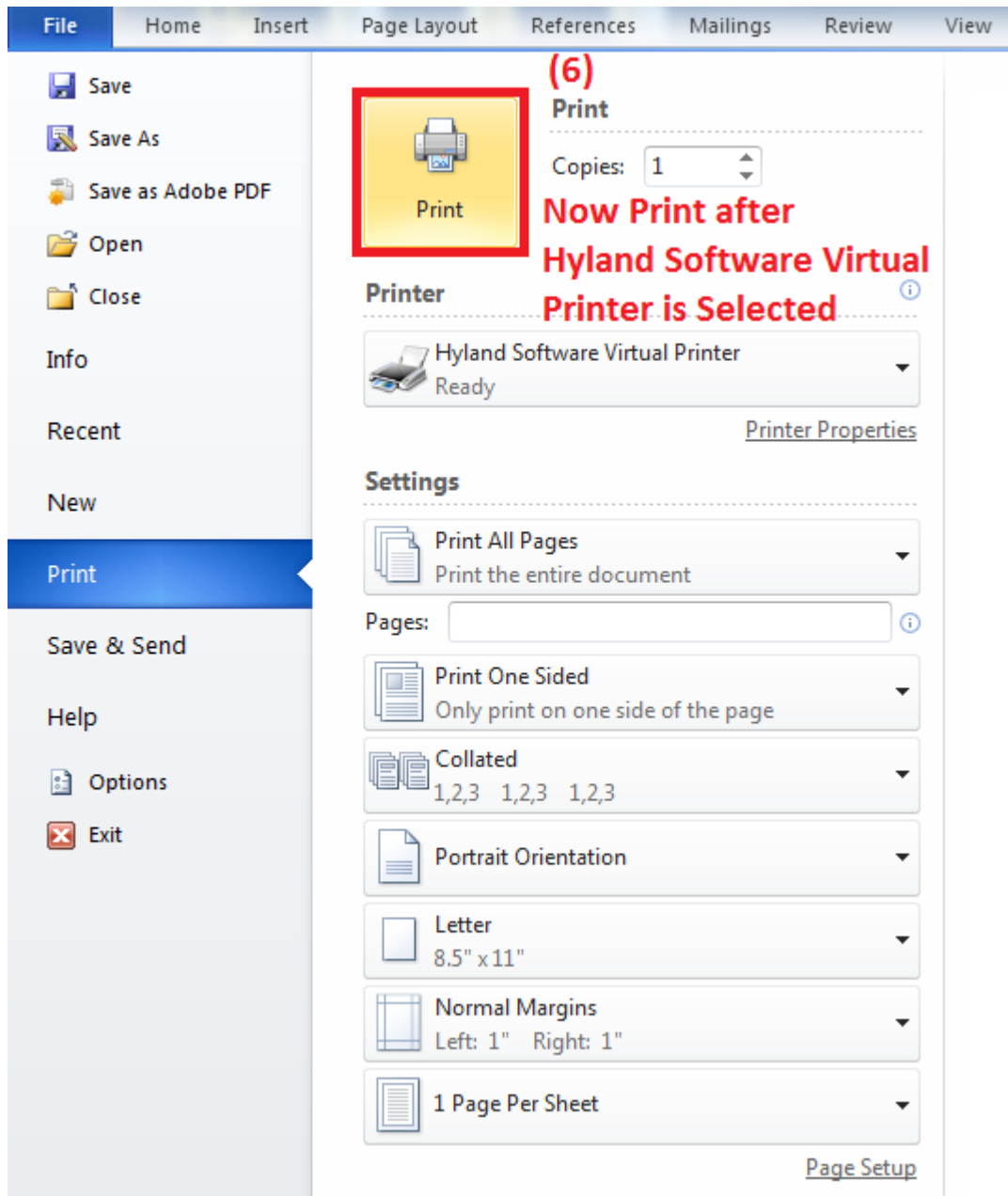


2. Select printer - “Hyland Software Virtual Printer.”



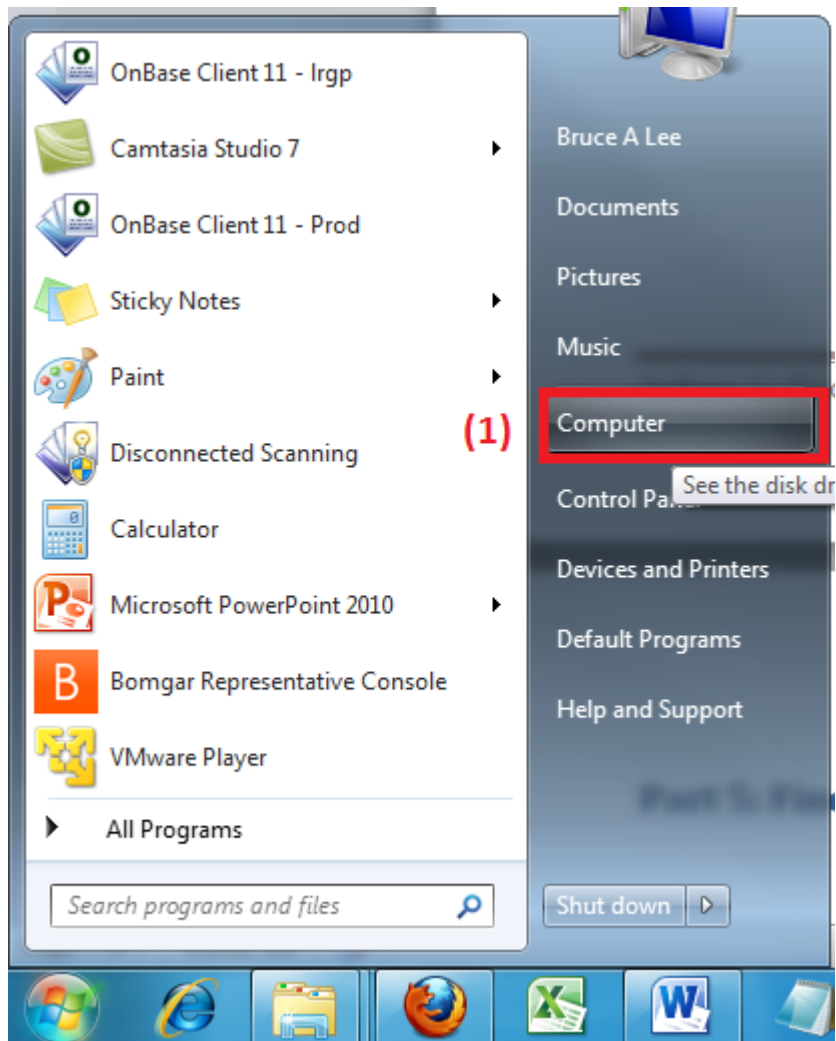
3. All that is left to do is "Print."

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

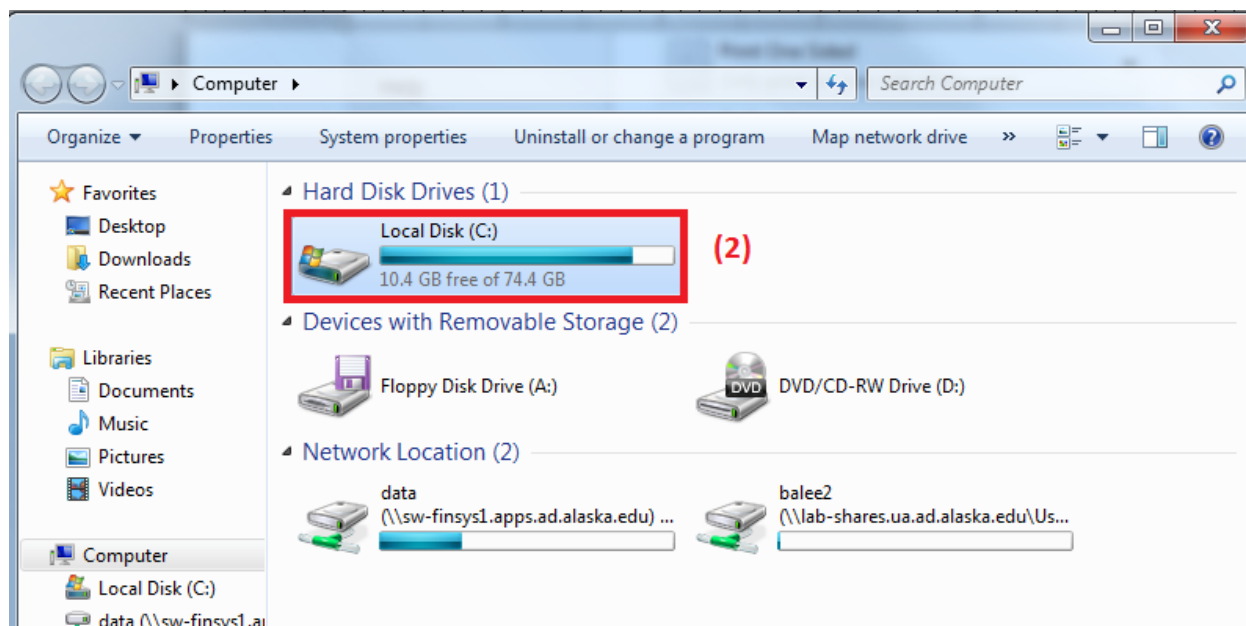


Finding the Printed Document

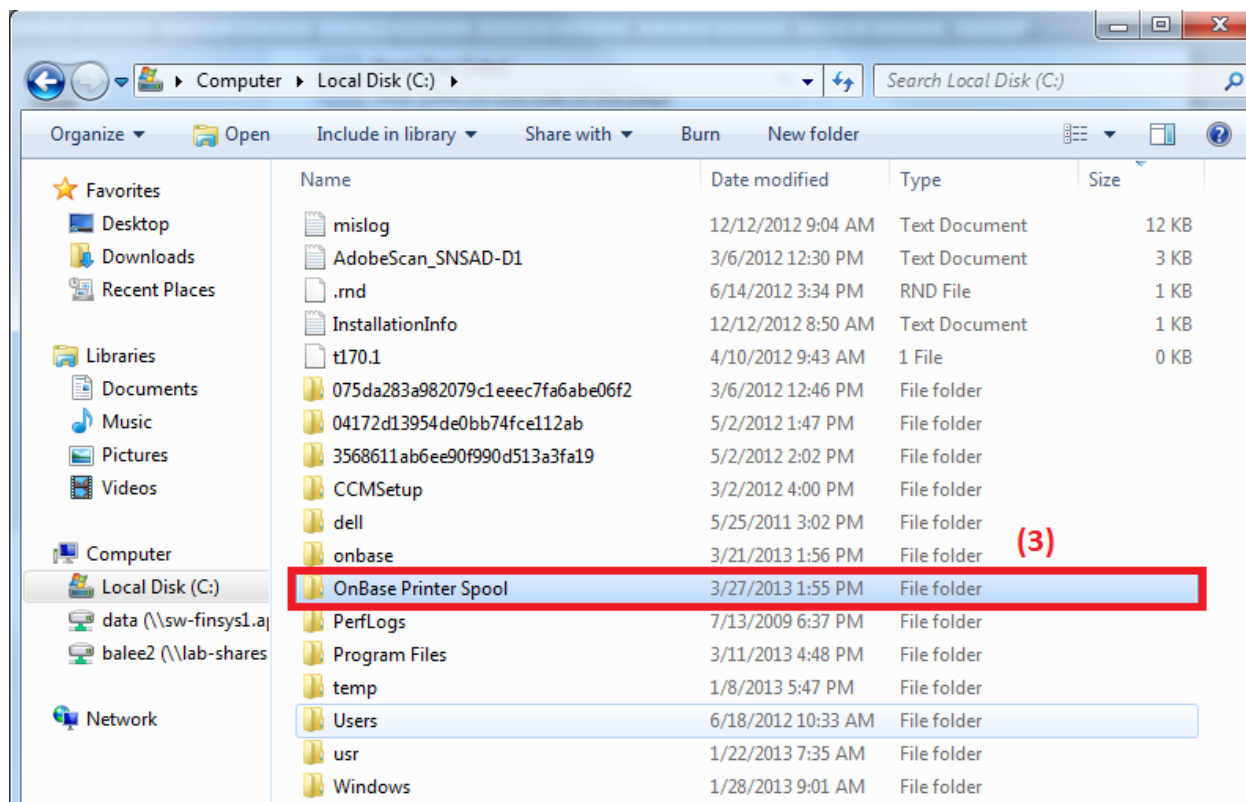
1. Go to "Start" → "Computer"



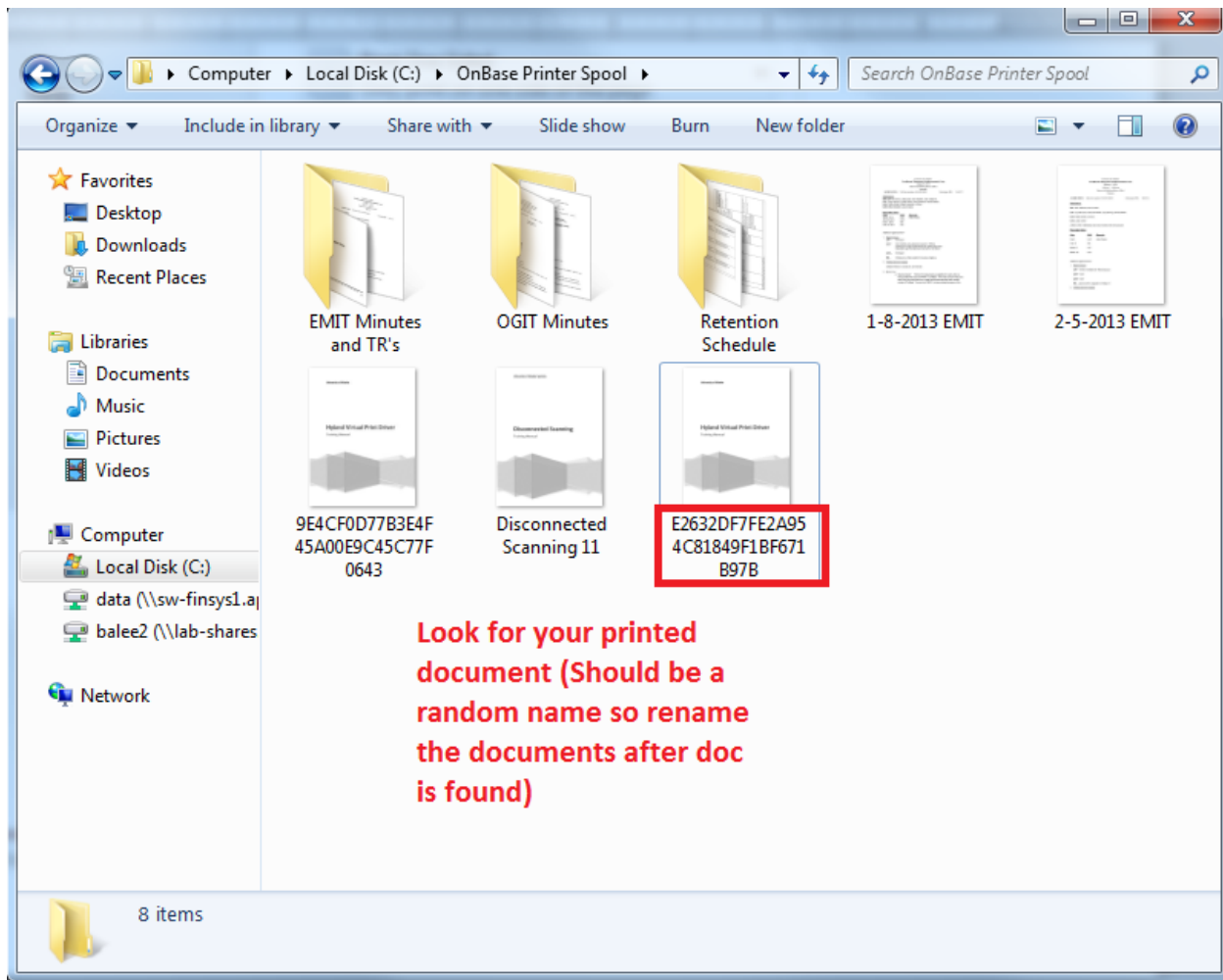
2. After opening “Computer” → “Local Disk (C:)”



3. Find “OnBase Printer Spool”

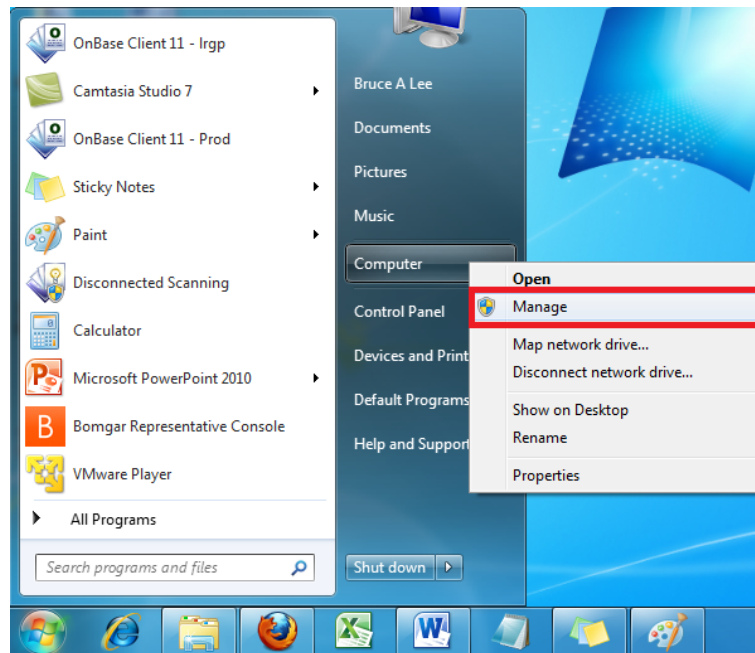


4. Find your document. It should be a randomly named document in TIFF format.

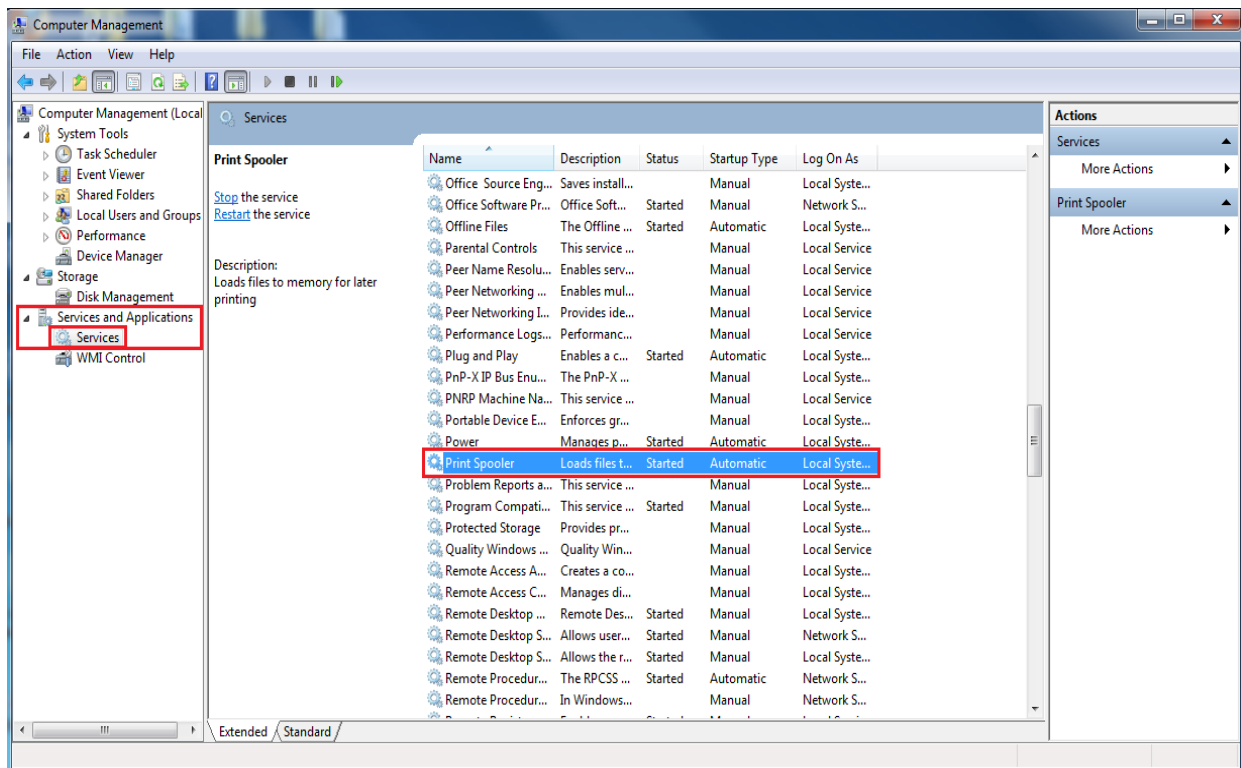


Some Notes/Troubleshooting to Consider***

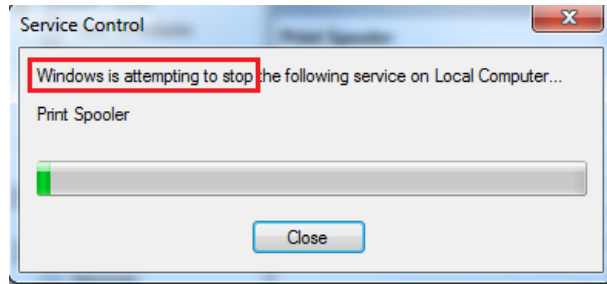
- When using the virtual printer, 2 or 3 pages will print fine without errors.
- Errors may occur when printing 18-20 pages.
 - The user may not print the full amount of pages in your document if the user does not wait long enough.
 - When this happens, print again and wait couple minutes or 15 minutes.
- 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."



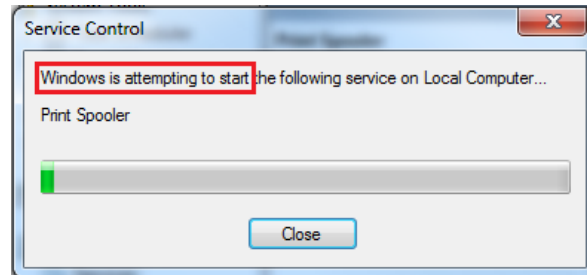
- Go to “Services” under “Services and Applications.”
- Then scroll down to find “Print Spooler.”



- “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 click on the “Document Retrieval” drop down box or whichever is currently selected and choose “Import Document.”

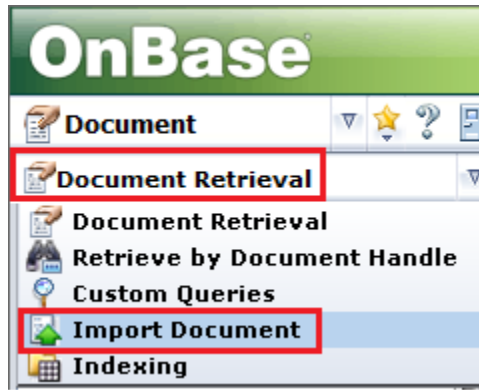


Figure 19: Opening Import Document

Steps 2 – 7 are visually shown in Figure 20 on page 14

- 2) The “Import Document” feature should open on the main page
- 3) 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**

- There are 2 ways for converting a document to a TIFF image
 - o One way is to use the “save as” feature starting from a Word Document → PDF → TIFF corresponding in the order given
 - o Second 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.
- Feel free to ask your trainer or OnBase administrator for additional help

- 4) Fill in the “Document Type Group” and “Document Type”
- 5) 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**
- 6) Enter the appropriate keywords and fill in the Red areas as they are required fields
- 7) Click “Import” once everything is ready to be imported (The Green Upward Arrow)

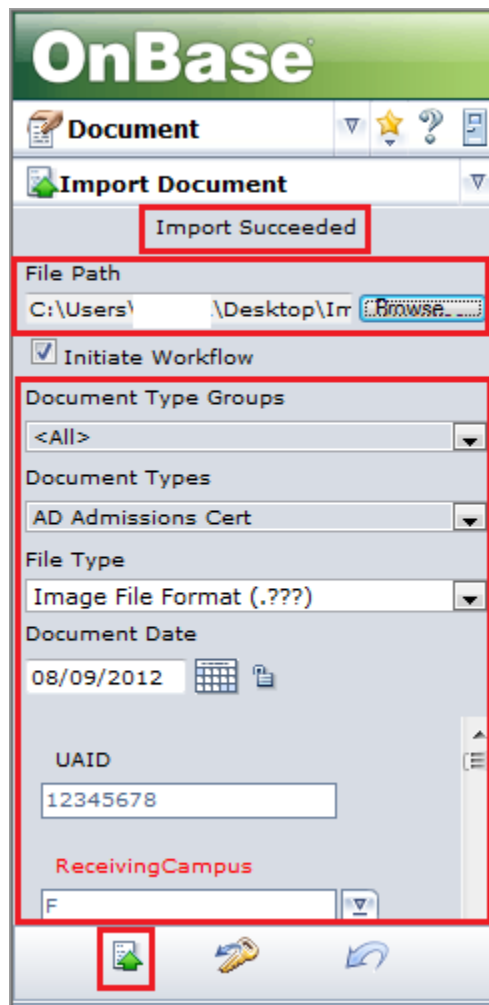


Figure 20: Import Document Window

- 8) The imported document may now be retrieved from Document Retrieval