Hi Everyone,

I'm forwarding an updated training schedule from Julie. Please share with participants at the colleges.

Thank you.

Teresa

Scan/Store/Retrieve Training

Day 1 - March 12th
Morning 9am – Noon

Document Retrieval/Client Usage
- Custom Query
- Application Enabler Retrieval
- Autofill Keyset
- Print or Send to File/Email

Modifying Documents
- Re-index
- Delete Document
- Edit or Delete Pages
- Send to > Create New Document

Import
- Ad-hoc Import
- Virtual Print Driver

Afternoon
1:30 pm – 4:30pm

Scanning/Indexing
- Batch Preparation - remove staples, sort and order pages, add a Batch Cover Sheet
- Scan Station - power on, load documents in the tray
• Launch OnBase Client and Navigate to Document Imaging
• HR Scan Queues
• Scan Formats - duplex vs. simplex, B&W vs. color, one multi-page doc vs. multiple docs single page
• Indexing

Day 2 - March 13th
Morning 9am – Noon

Document Retrieval/Client Usage
• Personnel Folders (creating, adding, searching, manually modifying)
• Cross References
• Notes and Annotations

Sys Admin Training and Short Admin Meeting
Reporting
• Share OnBase Configuration Spreadsheet
• Review Cross Reference Creation
• Review Custom Query Creation
• AutoFill Process
• Go Live Date