

Griffin, Kathleen

Subject: FW: OnBase Training Schedule

From: Nicolas, Teresa

Sent: Wednesday, March 05, 2014 6:54 PM

To: Armistead, Linda; Boulingui, Jan; Cafe-Rawlinson, Jennifer Lisa (Jenn); Killings, Denise; Orpilla, Rose; Rawlinson, Reed; Shipp, Dio

Cc: Blaney, Kenneth; Abbott, Daniel; Warriar, Satish; julie.schaeffer@hyland.com

Subject: OnBase Training Schedule

Hi Everyone,

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

Thank you.

Teresa

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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

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