OnBase
Capture Store & Retrieve Training-the-Trainer Training

CENTRAL CONNECTICUT STATE UNIVERSITY

Steve Brenneman, Solution Consultant

Paul van der Hoeven, Project Manager

July 2, 2021

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AGENDA

- Schedule
- Next Steps

MONDAY – JUNE 14TH, 2021

Time Frame (EST)	Topic
9:00 – 12:00 p.m.	Train the Trainer – Session 1
12:00 – 1:30 p.m.	Break for Lunch
1:30 – 4:30 p.m	Train the Trainer – Session 2

TUESDAY – JUNE 15TH, 2021

Time Frame (EST)	Topic
9:00 – 12:00 p.m.	CCSU UAT Testing Kickoff – Session 1
12:00 – 1:30 p.m.	Break for Lunch
1:30 – 4:30 p.m.	CCSU UAT Testing Kickoff – Session 2

Utilize Participant List Options (Silently notifies host):

Yes/No; Go Slower/Faster; Thumbs Up/Down; Clap; Need a break; Away

TRAIN-THE-TRAINER APPROACH

- **Train-the-Trainer** – Training for department champions enabling you to train others and perform User Acceptance Testing.

- **Documentation –** Quick Reference Guides and the exercises that are provided. Your notes.

- **Hyland Premium Subscription** (requires a Hyland profile)
  - **End User Essentials:** OnBase Foundation Unity Client: Hand-On Lab
  - **End User Essentials:** OnBase Foundation Web Client

- Today's Session is recorded.

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Questions?

OnBase Capture Store & Retrieve User Testing Kickoff

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TUESDAY – APRIL 13TH, 2021

Time Frame (EST)	Topic
9:00 – 12:00 p.m.	User Acceptance Testing Kick off – Session 1
12:00 – 1:30 p.m.	LUNCH BREAK
1:30 – 4:30 p.m.	User Acceptance Testing Kick off – Session 2

AGENDA

- Define User Acceptance Testing
- Project Timeline

WHAT IS USER TESTING

- **Primary:** A process by which we confirm that the solution meets mutually agreed-upon requirements and readiness for Go live:

  - Documents can be captured, stored and retrieved properly.

  - Functions as intended.

- **Secondary:** An Extension of the Train-the-Trainer Training:

  - Opportunity to practice your skills.

  - Establish your own training for others in your department.

  - Re-review items from training that you had questions on or wanted us to go back over.

  - Collaborate with your training co-workers for certain scenarios and impact on your processes.

INFORMATION THAT HELPS SPEED UP RESOLUTION

1. Identify where you see the issue (Scan Queue? Retrieval? A Particular Custom Query? Indexing?).

2. Names, Batch numbers and Document information is important.

3. If emailing screenshots, please be mindful of Personal Identifying Information. Redact that info or just reference the batch number. Also, put the issue number in the accompanying email.

4. Include estimated date/time when the issue occurred.

5. Add CCSU as a prefix to the ticket

    1. CCSU – Missing keyword for Transcript Document Type

    2. CCSU – Access issue.

WHAT HAPPENS WHEN WE FIND AN ISSUE?

1. CCSU (Stan Styrczula) creates the ticket in Hyland's issue tracker.

2. New tickets notify Hyland's Project Manager (Paul van der Hoeven)

3. Hyland will review the issues

4. Hylander's will review, email back to the team for any additional information/questions.

5. Hyland Solution Consultant will work to resolve the issue.

6. Once Resolved, Hyland will change status to "Ready for Test"

7. A Hylander will notify the ECM when we will need to retest.

TESTING TIMELINE

Event	Date
UAT Kickoff	6/15/2021
Complete User Testing	6/23 (Wednesday) last ticket. 6/24 (Thursday) last resolution.
User Acceptance Testing – Acceptance	6/25 (Friday)
Migrate to Production	6/25 – 6/26 (Over the weekend)
Go Live	6/28
Go Live Support	6/28 – 7/1
Full transition of CCSU to Tech Support	7/1

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Questions?

WHAT HAPPENS WHEN WE FIND SOMETHING?

Stan Styrczula – Testing Coordinator: Logs issues within Community as issues are raised by the testing team.

- Coordinate with Stan regarding testing times, issue reporting that should be raised to Hyland.

COMMUNITY ACCESS INSTRUCTIONS

- Direct the individual to https://www.onbase.com/community. Once there, there is a link on that page that says, **Register Now.**

- Fill out the **Profile Creation** Form with their company email address (this must be your institutional email address) and a password. Click the **Next** button.

- If prompted, fill out the Company Info form and click submit.

- From there, follow the prompts and any additional information provided.

- If it asks for HSI number, use: **27130**