



OnBase Training Lab Exercises

Trainee Name	Student IDs to Use	Student Name
Anthony Martinez	1234501	George Washington
Jillian Holt	1234502	John Adams
Pat Gardner	1234503	Thomas Jefferson
Tang Nguyen	1234504	James Madison
Doreen Revoir	1234505	James Monroe
Claudia Richards-Meade	1234507	Andrew Jackson
Denise Chowaniec	1234510	John Tyler
Barbara Gardner	1234514	Franklin Pierce
Stan Styrzula	1234521	Chester Arthur
Shilpa Enugala	1234523	Benjamin Harrison
Thomas King	1234525	William McKinley
John Hayes	1234527	Howard Taft
Brenda Whalen	1234528	Woodrow Wilson
Extra	1234529	Warren G. Harding
Extra	1234530	Calvin Coolidge
Extra	1234533	Harry Truman
Extra	1234534	Dwight D. Eisenhower
Instructor	1234538	Gerald Ford

Capture & Access Reminders

Document Type	Classification of documents within OnBase (ex. <i>Birth Certificate</i>)
Document Type Group	Category of Document Types (ex. <i>Admissions Documents</i>)
Keyword	Indexed value placed on a document (ex. First Name = James)
Keyword Type	Category of indexing values (ex. First Name, Last Name)
Scan Queue	Process configured to enable scanning to specified Document Types
Batch	A group of documents scanned / processed together
Status Queue	Current disposition of a scanned batch (ex. Awaiting Index, Awaiting Commit, Committed)
Indexing	Adding keyword values to a batch of scanned documents
Committing	Invoking the final disposition of a batch, often configured to result in the addition of batch documents into Workflow process
Lock Keyword Type	( - OnBase Client /  - Web Client): Retain entered keyword value for indexing the subsequently indexed document
Append	During indexing, the current page is part of the same document as the page scanned immediately before
Split	Split the current document into multiple documents
AutoFill	Index the primary keyword (e.g., ID) and tab out to populate associated fields (e.g., First Name, Last Name, Email)
Lookup	If you don't know the primary keyword, find it by using secondary keywords
Data Set	A list of values to choose from when indexing for data consistency
Navigation	Move between indexing fields by mouse click or <Tab>

Capture & Access

Exercise 1:

Index the first document within the batch associated with your student using their student ID, then populate ONLY the AutoFill Keyword Set. Without indexing anything else, try to save your indexed document. What happens? Why? How do you resolve this?

Exercise 2:

Resolve the issue in the first Exercise, but do not complete the index of the document yet. The next page in the batch is a new document for the same student. Apply the method for carrying over the values entered on the first document to the second document. Complete the index of the first document. Did the values remain for the second document in your batch? Complete the indexing of any remaining documents in your batch.

Exercise 3:

Retrieve one of the documents indexed in the prior exercises. After retrieving that document, you realize you need to change it to a different Document Type. How do you do that? What would you do if you also had to change it to a different student?

Exercise 4:

Retrieve documents for your student via the Custom Query. How does this method differ from using the Retrieval Dialog?

Exercise 5:

Open the ZTRN Essay document and double-click on the document image. What happened?

Exercise 6:

Retrieve one of the documents you indexed.

1. Add a note to a document.
2. Add an annotation to a document.
3. Add a redaction to a document.
4. Edit a note on the document.
5. Can you delete any notes or annotations?

Exercise 7:

Retrieve one of the documents you indexed; are you able to delete it?

Exercise 8:

Attempt to retrieve documents from the Document Type of your choice without providing any search criteria. What happened?

Exercise 9:

Using a single search, retrieve all ZTRN documents for students having the last name Madison, Monroe, Tyler, or Pierce.