



## OnBase Training Lab Exercises

Trainee Name	Student IDs to Use	Student Name
Thomas Bethin	1234501	George Washington
Sarah Bennett	1234502	John Adams
Katie O'Neil	1234503	Thomas Jefferson
James Whittemore	1234504	James Madison
Matt Bielawa	1234505	James Monroe
Nicole Spencer	1234507	Andrew Jackson
Rebecca Pickering	1234510	John Tyler
Shannon Kalahan	1234514	Franklin Pierce
Stan Styrzula	1234521	Chester Arthur
Shilpa Enugala	1234523	Benjamin Harrison
Thomas King	1234525	William McKinley
Gabriela Flores-Erazo	1234527	Howard Taft
John Hayes	1234528	Woodrow Wilson
Brenda Whalen	1234529	Warren G. Harding
Extra	1234530	Calvin Coolidge
Extra	1234533	Harry Truman
Extra	1234534	Dwight D. Eisenhower
Instructor	1234538	Gerald Ford

## Capture & Access Reminders

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