

Ohio EPA OnBase Training

Login Credentials:

Username	
Password	

Ohio EPA OnBase Training

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Logging into OnBase

The first step to testing the solution is to launch the OnBase Unity Client and Log in.

1. Launch the Unity Client by double-clicking the icon on your desktop:



2. After you launch the module, the following dialog box is displayed:



3.  Enter the username you have been assigned.

4.  Enter the password associated with the username.

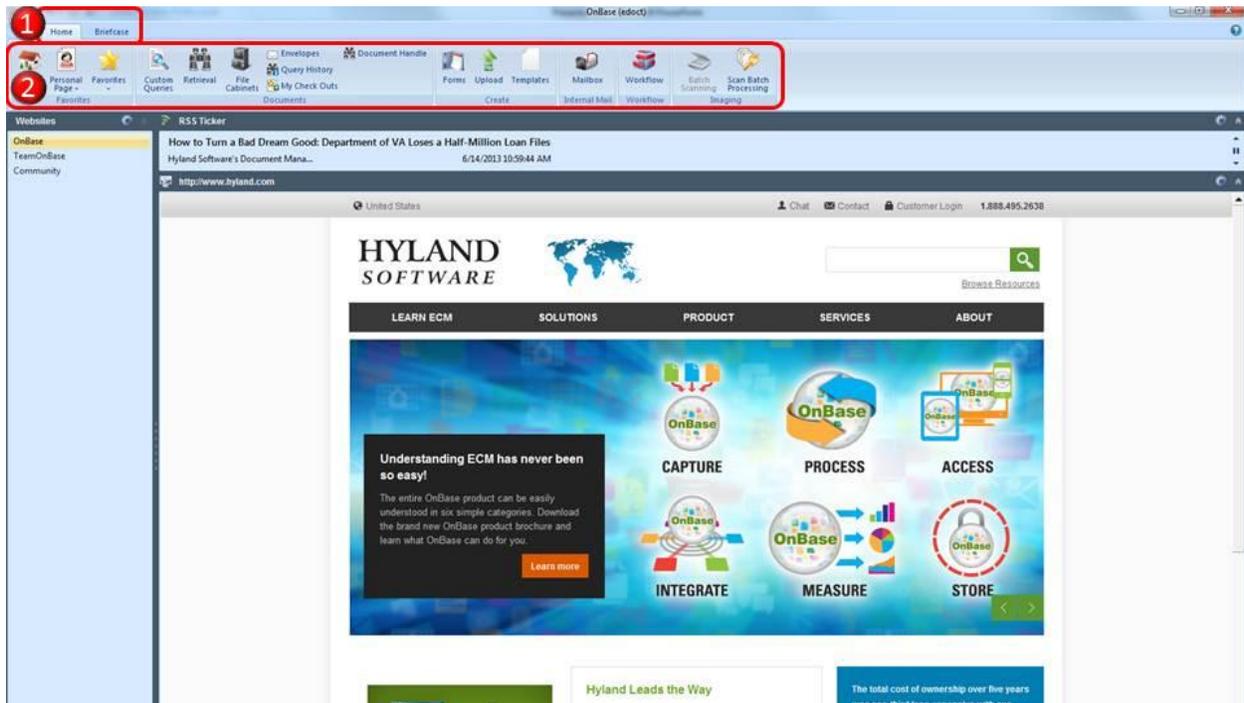
5. Click **Login**.

6. The Unity Client will open.



Navigating the Unity Client

The OnBase Unity Client



	Region	Description
1	Tabs	Clicking on a tab will display a ribbon with buttons related to the available user actions
2	Ribbon	A ribbon is displayed by clicking the corresponding tab. Each ribbon is divided into ribbon groups. In the above screen shot, the Home tab is displayed. The contextual ribbon displays available user actions based on the currently displayed layout.

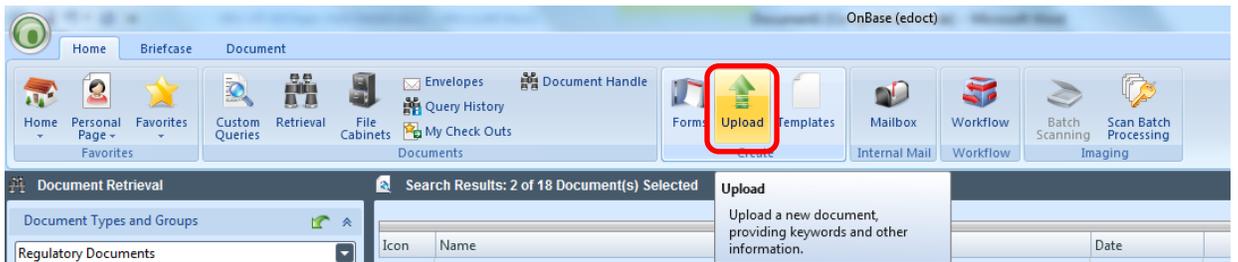
1. Place your cursor over each button to view the contextual help that is displayed.



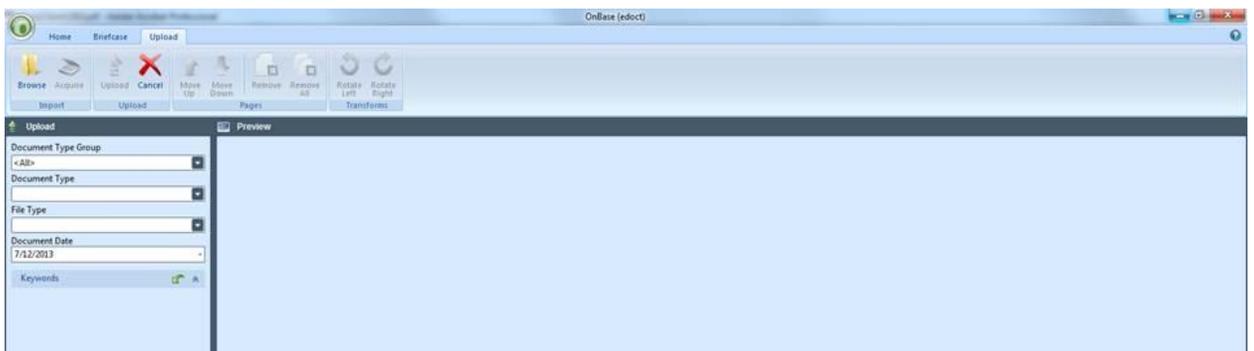
Uploading a Document to OnBase

You can use the Unity Client to upload documents to OnBase. For this example we will bring in a sample Warning Letter Document Type.

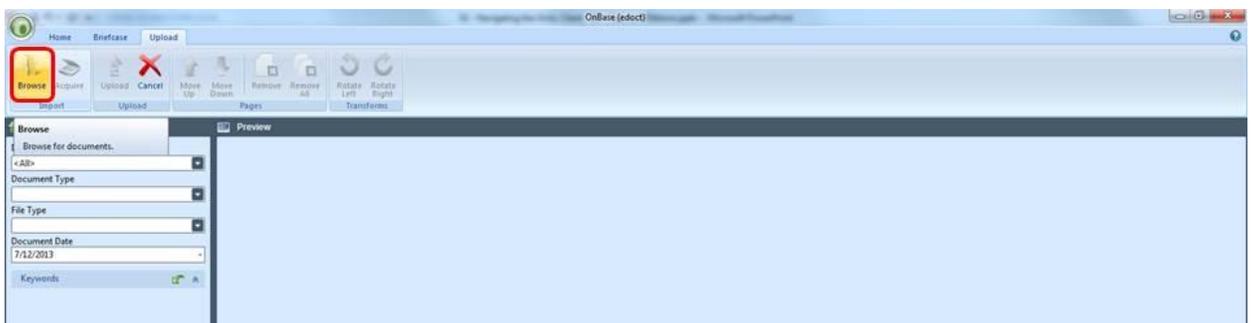
1. On the **Home** tab, click **Upload**.



2. The **Upload Pane** will be displayed.

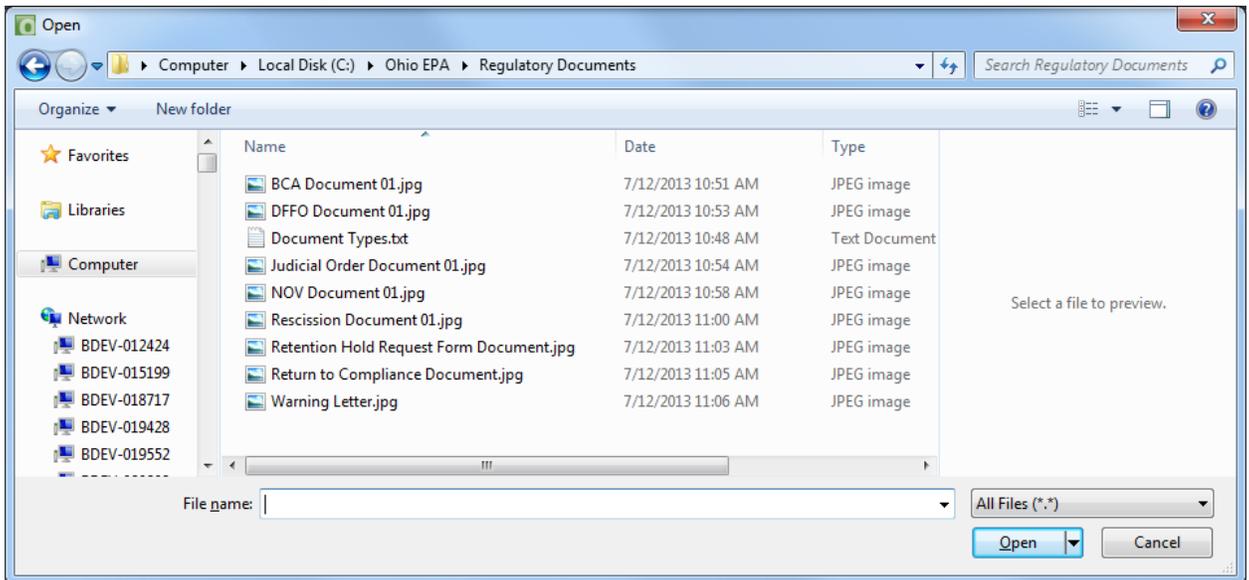


3. Select **Browse**.

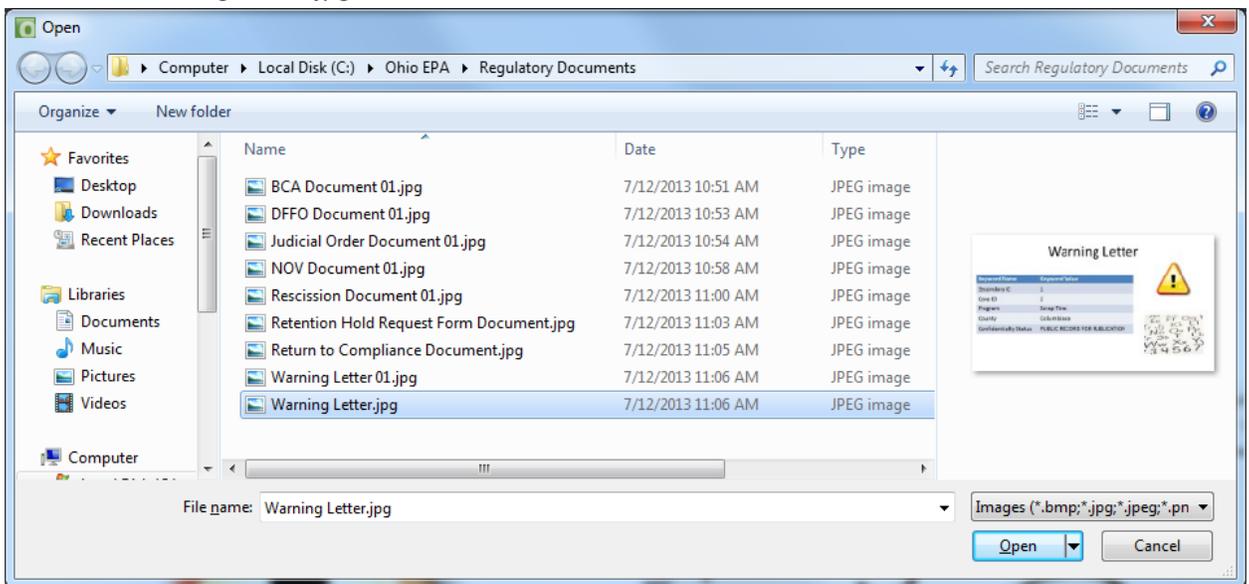


The standard Windows Open File dialog box is displayed. Browse imports the document from any drive accessible from your workstation.

4. Browse to C:\Ohio EPA\Regulatory Documents

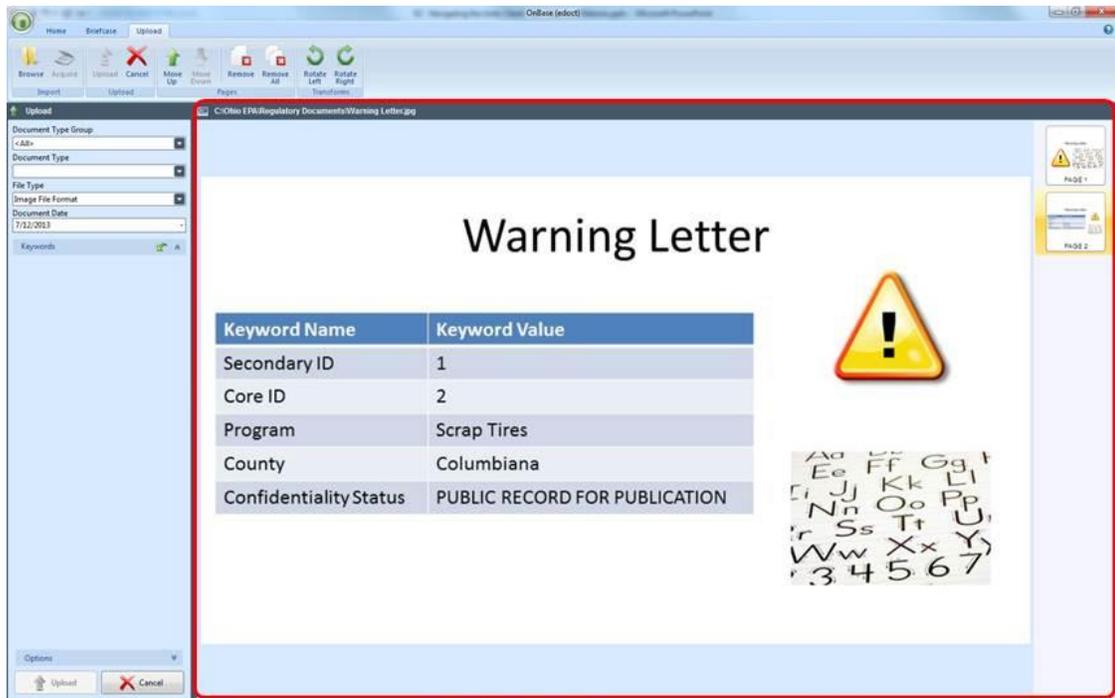


5. Select the Warning Letter.jpg



6. Click Open.

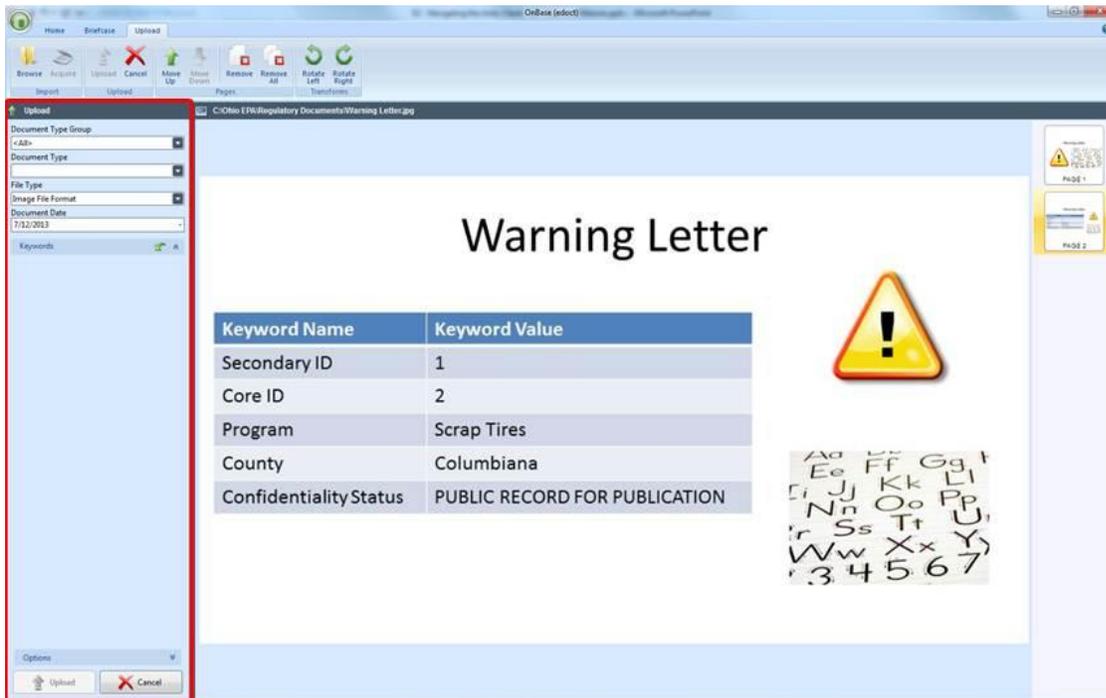
7. The document is displayed in the Preview pane.



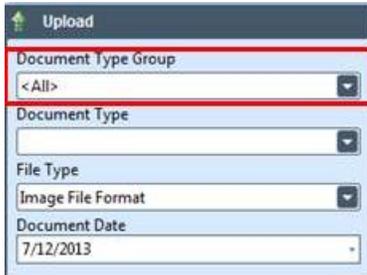
Indexing the Uploaded Document

In order to allow users to retrieve the document it must be assigned to a **Document Type** and any applicable **Keyword Values** should be populated.

Indexing is done in the **Upload Pane**.

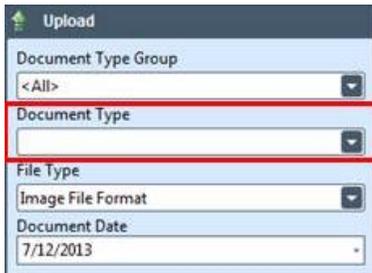


1. From the Document Type Group drop-down list, select the Document Type Group to be assigned to the document by OnBase. After selecting a Document Type Group, OnBase automatically filters the available Document Types in the Document Type drop-down list.



Document Type Group

2. From the Document Type drop-down list, select the Document Type to be assigned to the document by OnBase. After selecting a Document Type, OnBase automatically displays fields for Keyword Types that are used to index documents of that type.



Document Type

3. Review the document and enter the appropriate keywords.

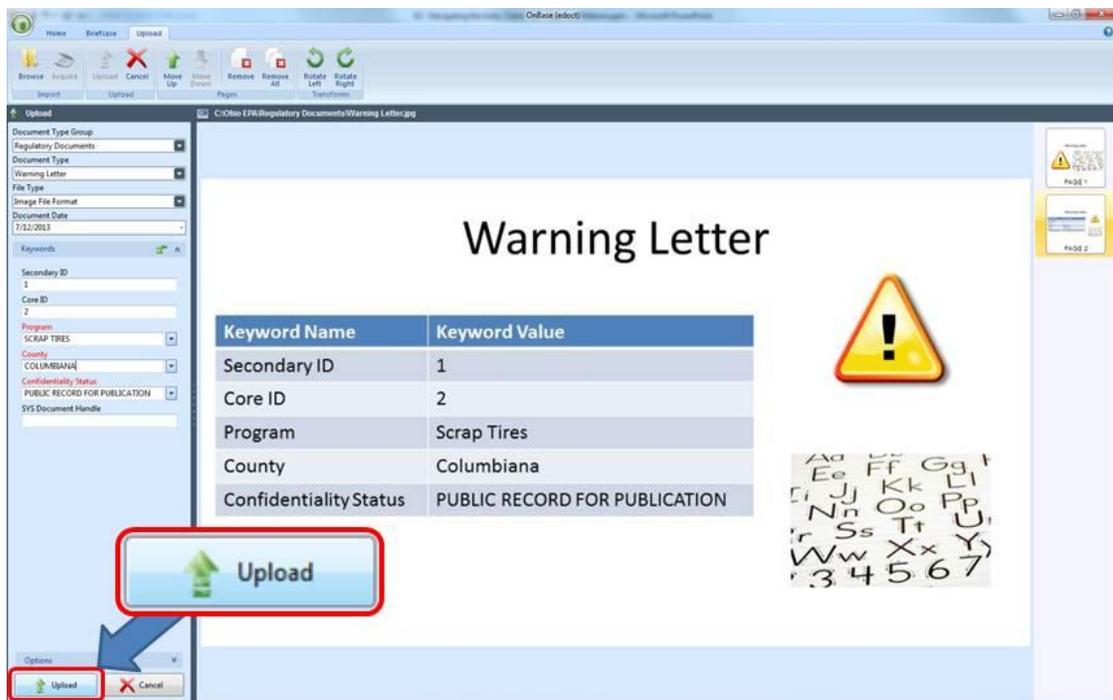


Note: Some **Document Types** are configured to require **Keyword Values** to be entered in order to create and/or retrieve documents. **Required Keyword Values** are displayed in **red** for these operations, which may include the following: Document Retrieval, Upload, and Add/Modify Keywords.

Secondary ID	
Core ID	
Program	
County	
Confidentiality Status	

TIP! Click the **Tab** button to move between keywords.

4. Click the **Upload** button to import the document into OnBase.



Note: Once uploaded the document may open. This is dependent on the **Options** selected while uploading the document.

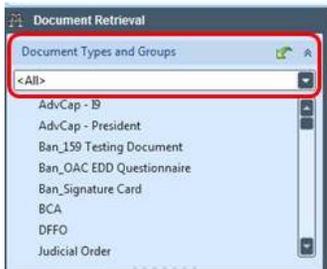
Retrieving a Document from OnBase

You can retrieve documents from OnBase. For this example we will retrieve the Warning Letter we imported in the last example.

1. On the Home tab, click **Retrieval**.

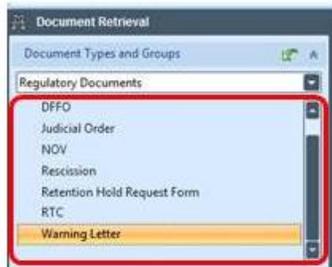


2. From the **Document Retrieval** pane select a **Document Type Group** from the dropdown menu.



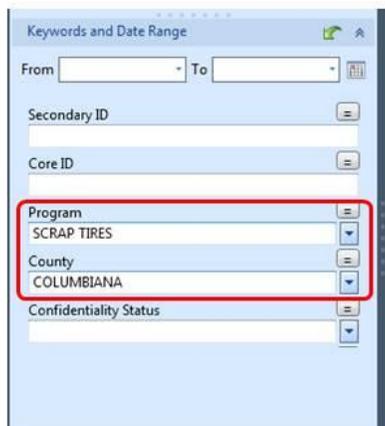
Note: After selecting a Document Type Group, OnBase automatically filters the available Document Types in the Document Type drop-down list.

3. Select the **Document Type** that corresponds to the document to be retrieved.



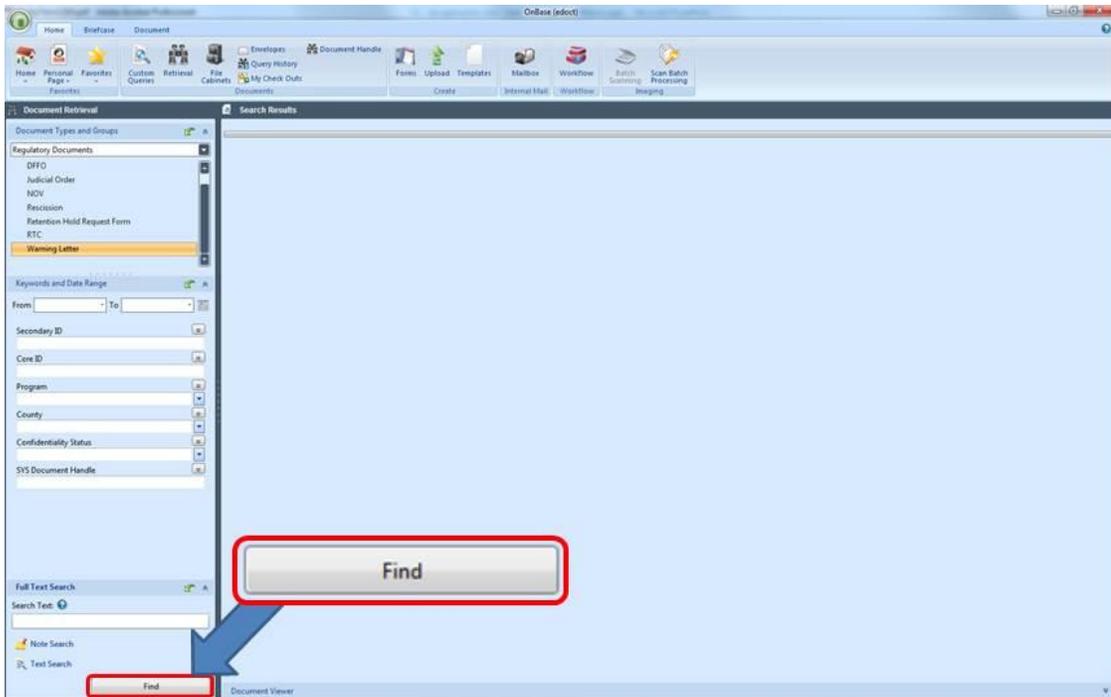
4. From the **Keyword and Date Range** dialog, enter either a date range and/or enter keyword values for one or more of the keywords related to the Document Type(s) being retrieved.

For this example retrieve all **Warning Letters** for **Scrap Tire** Programs in **Columbiana** County.

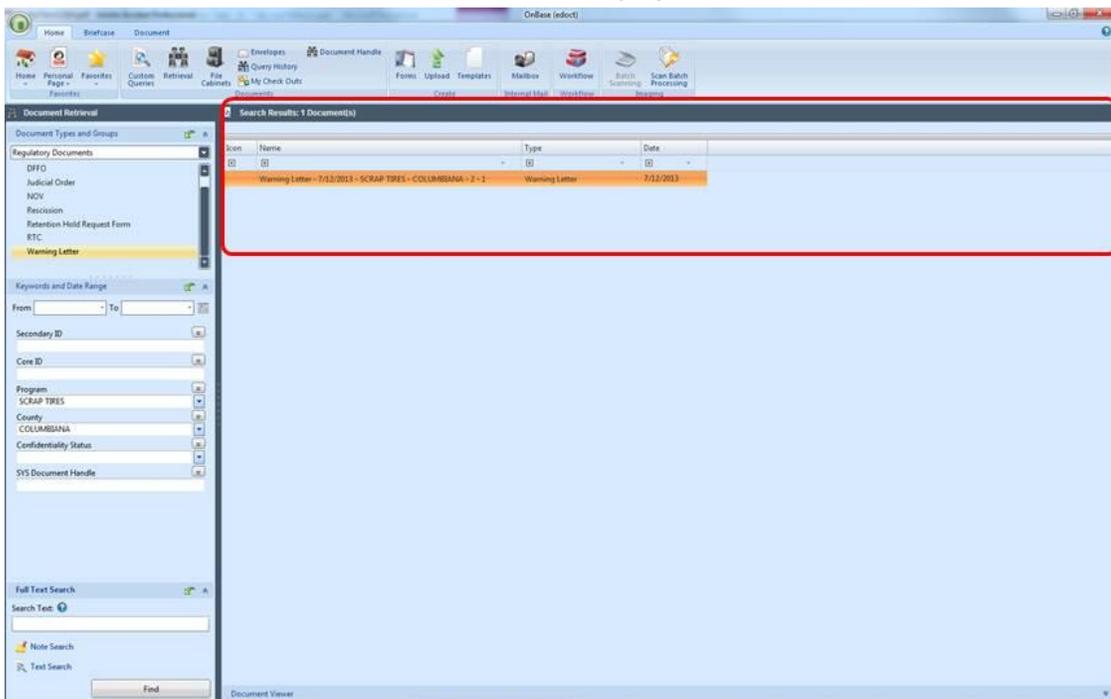


Note: The keywords displayed in the **Keyword and Date Range** pane may differ between Document Types. Only Keywords assigned to the Document Type selected in the **Document Types and Groups** pane will be displayed.

5. Click the **Find** button once the date range and/or keywords have been entered.



6. All documents that match the search criteria are displayed in a **Search Results** list.



Viewing a Document in OnBase

Viewing Documents with the Document Viewer

There are 2 options for viewing documents from the **Search results** pane.

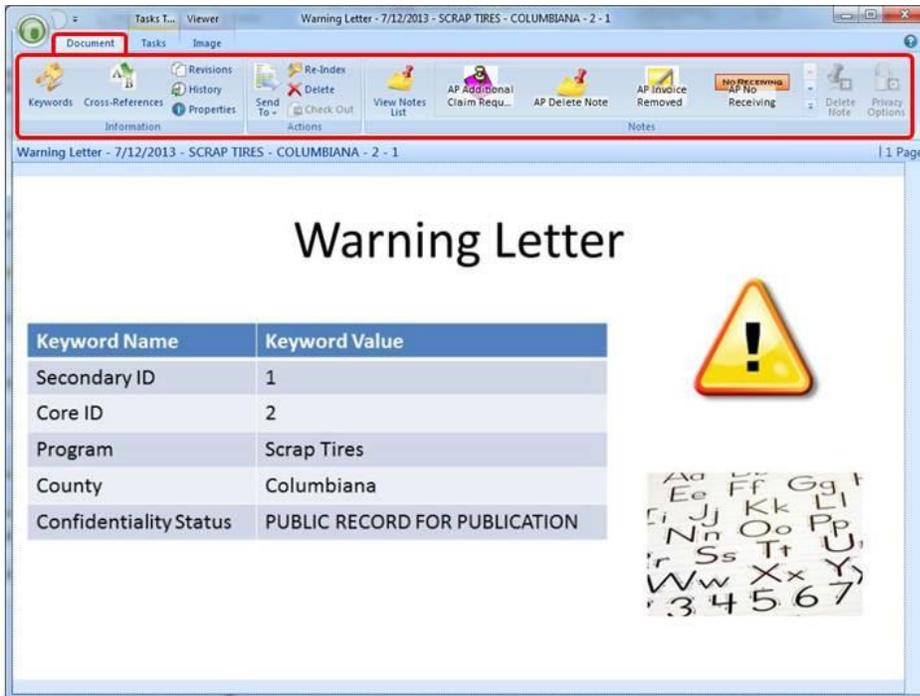
When the Document Viewer pane is expanded, you can view a document by selecting it from the Documents Search Results list.

Use this button to minimize or maximize the Document Viewer pane.

Keyword Name	Keyword Value
Secondary ID	1
Core ID	2
Program	Scrap Tires
County	Columbiana
Confidentiality Status	PUBLIC RECORD FOR PUBLICATION

Viewing Documents in a New Window

When the Document Viewer pane is minimized, double-clicking on a document will open the document in a new window with the **Document** tab and ribbon displayed.



Regardless of which option used to view documents, the same functionality is available on the **Document** tab.

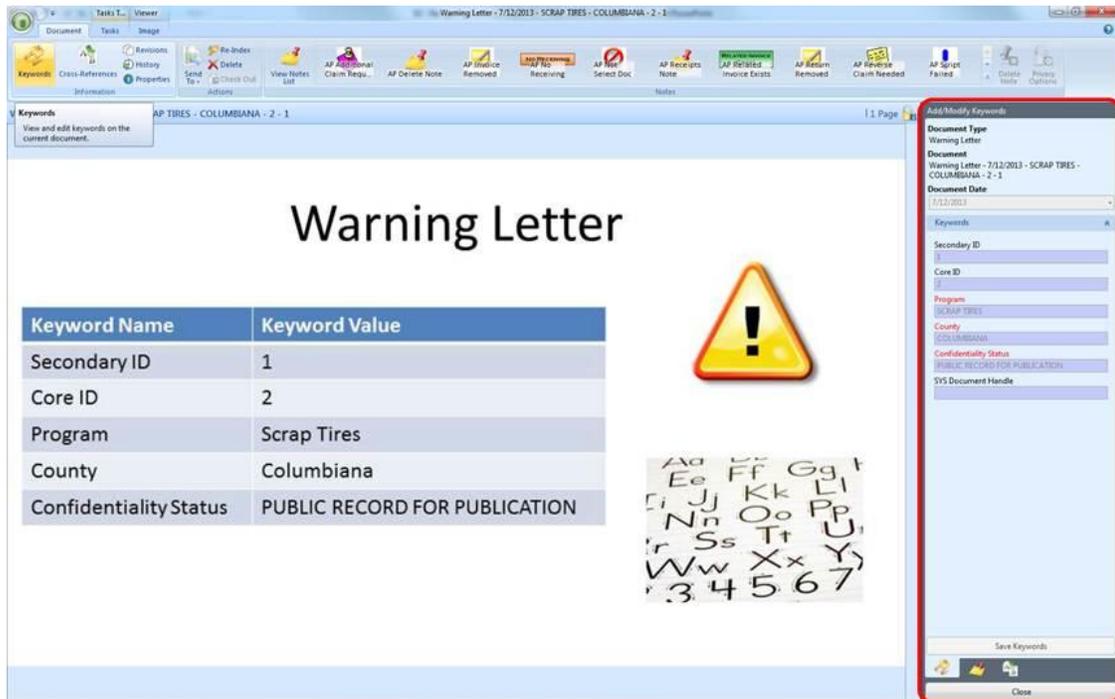
The Ohio EPA OnBase solution will commonly utilize the following buttons on the **Document** tab:

	Keywords displays the Add/Modify Keywords pane in the task pane. From this pane a user can view and/or modify keyword values.
	Revisions displays the Revisions and Renditions dialog box. In the Ohio EPA OnBase solution there will be PDF renditions of image documents.
	Send To displays many options. In the Ohio EPA OnBase solution the option that will be used is Create New Document .
	Re-Index displays the Re-Index pane in the task pane. Re-Indexing allows a user to change the Document Type, Document Date, and optional Keyword Types.

Reviewing Keywords on a Document in OnBase

While viewing a document in OnBase, users can utilize the **Add/Modify Keywords** pane to view and update keywords.

1. While viewing a document click on the **Keywords** button on the **Document** tab to view the **Add/Modify Keywords** pane.



2. From the **Add/Modify Keywords** pane, you can view or edit a document's Document Date or Keyword Values, depending on your rights and the Document Type.

Using the **Add/Modify Keywords** pane to complete the following table:

Secondary ID	
Core ID	
Program	
County	
Confidentiality Status	

Modifying the Keywords on a Document

Keywords are assigned to documents to help identify documents in the system. In some cases you may need to update the value of a Keyword.

Modifying Keywords - This is how you modify keywords

1. From an open document or from a Document Search Results list click **Keywords** on the Document tab.
2. The **Add/Modify Keywords** pane is displayed:
From the Add/Modify Keywords pane, you can view or edit a document's Document Date or Keyword Values, depending on your rights and the Document Type. Some Document Types are configured to not allow keyword editing, which renders a document's Keyword Values read-only.

Note: When the Add/Modify Keywords pane is displayed, other users cannot edit that document's Keyword Values. The document is locked until the Add/Modify Keywords pane is closed.

3. You can use the Add / Modify Keywords pane to remove, add, or change a Keyword Value:
 - a. To remove a Keyword Value from a document, delete the contents in the Keyword Type field.
 - b. To change the value, edit the Keyword Value currently residing in the Keyword Type field.
4. Click Save Keywords to save any additions or modifications in the Add/Modify Keywords pane.

When you modify a Keyword Value, the modified Keyword Value turns **yellow**.

TIP: You can use the Tab key to move to the next Keyword Value field.

Re-Indexing a Document

Re-indexing provides the ability to change Keyword Values, Document Date, and Document Type.

Each document stored in OnBase has an associated Document Type, Document Date, and optional Keyword Types. This information is usually entered when a document is first imported into OnBase upon indexing.

You can change this associated information using the Re-Index feature.

1. From an open document or from a Document Search Results list click **Re-Index** on the **Document** tab.
2. The **Re-Index** pane is displayed.
 - a. If necessary, change the document's Document Type by selecting a new Document Type from the **Document Type** drop-down list. All Document Types that you have rights to create are displayed.
 - b. Change the Document Date, if desired. If a document date is not specified when the document is processed into OnBase, the Document Date is the same as the Date Stored.
 - c. Change Keyword Values as desired. You can use the Tab key to move to the next Keyword Value field. When you modify a Keyword Value, the modified Keyword Value turns **yellow**.
3. Click **Re-Index** to save your changes and re-index the document. Click Close to cancel changes.

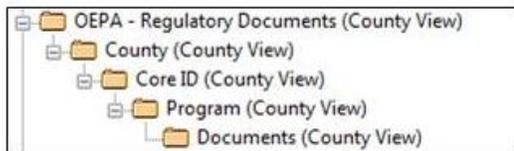
Retrieving a Document Using OnBase Folders

OnBase folders allow users to view and organize documents electronically, as they would with a folder of paper documents, but with the added benefits and security of OnBase. Users can access related documents in a way that is familiar, logical, and easy to use.

Because each document can reside in multiple folders, departments that prefer different folder structures can access the same document in different locations. Because there is only one actual document, changes to the document are reflected in all locations, even when the document resides in many folders.

The Ohio EPA OnBase solution includes several folders:

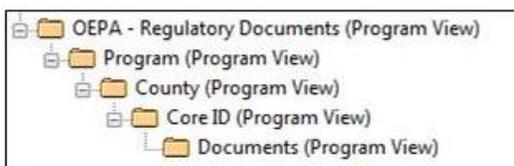
- Compliance Correspondence
- OEPA – Regulatory Documents (County View)



- OEPA – Regulatory Documents (Facility View)



- OEPA – Regulatory Documents (Program View)



For this example we will retrieve the Warning Letter imported earlier and view the document through each foldering solution.

Recall the keywords for the document imported earlier:

Keywords

Secondary ID
1

Core ID
2

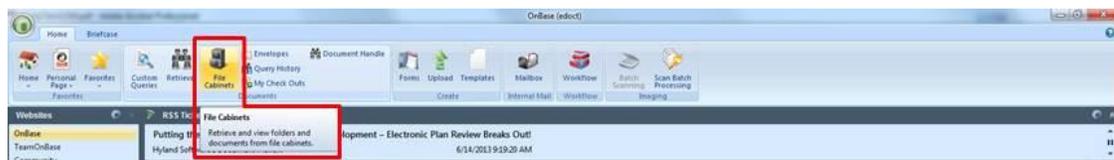
Program
SCRAP TIRES

County
COLUMBIANA

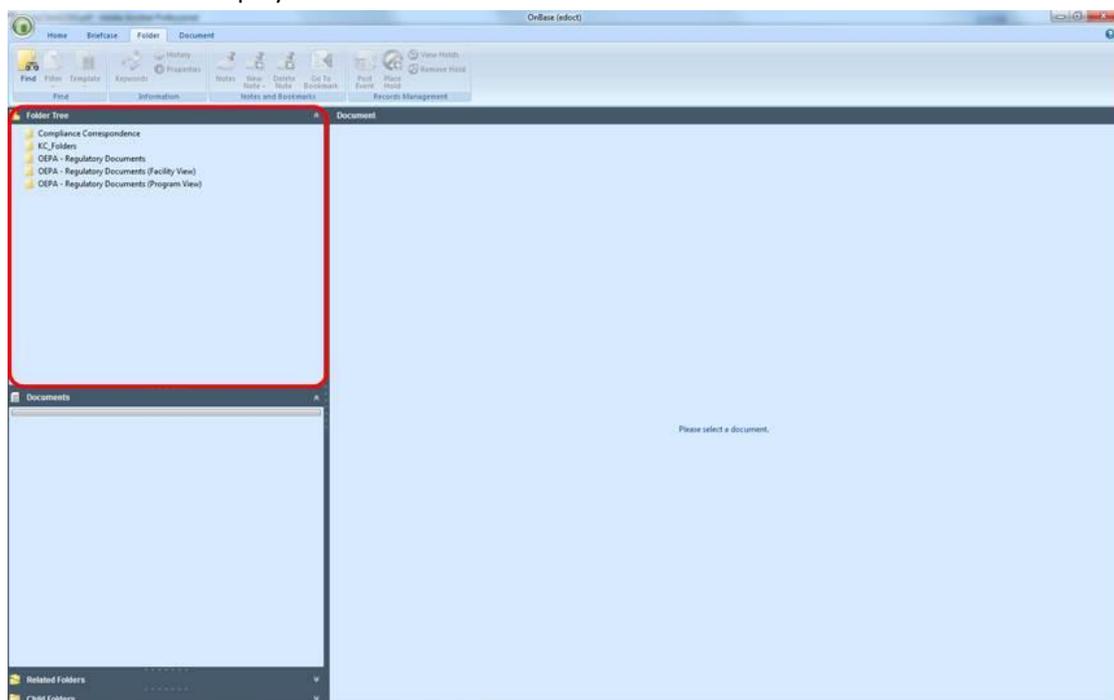
Confidentiality Status
PUBLIC RECORD FOR PUBLICATION

Viewing Folders

1. To access OnBase folders, select the **File Cabinets** button on the **Documents** ribbon.



2. The **Browse Folders and File Cabinets** layout displays all available file cabinets and folders.
3. The **Folder Tree** displays the available Folders.



4. Select the **OEPA – Regulatory Documents (County View)** folder to expand the folder and view sub-folders.

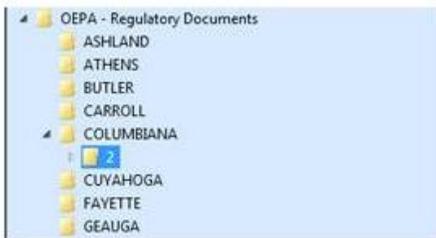


Note: The list of counties populates based on the documents in the system. For example, by looking at the list of counties displayed we know that Stark county has no documents in this folder.

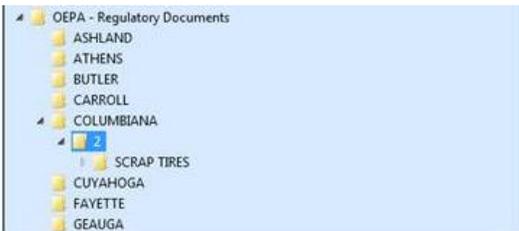
5. Select the folder that represents the county of the **Warning Letter** imported into OnBase earlier in this session.

What county did you select? _____

6. The folders displayed under each county represent the **Core ID**. Folders are created dynamically. This means that a folder will only exist if a document with a corresponding **County** and **Core ID** exists in OnBase.

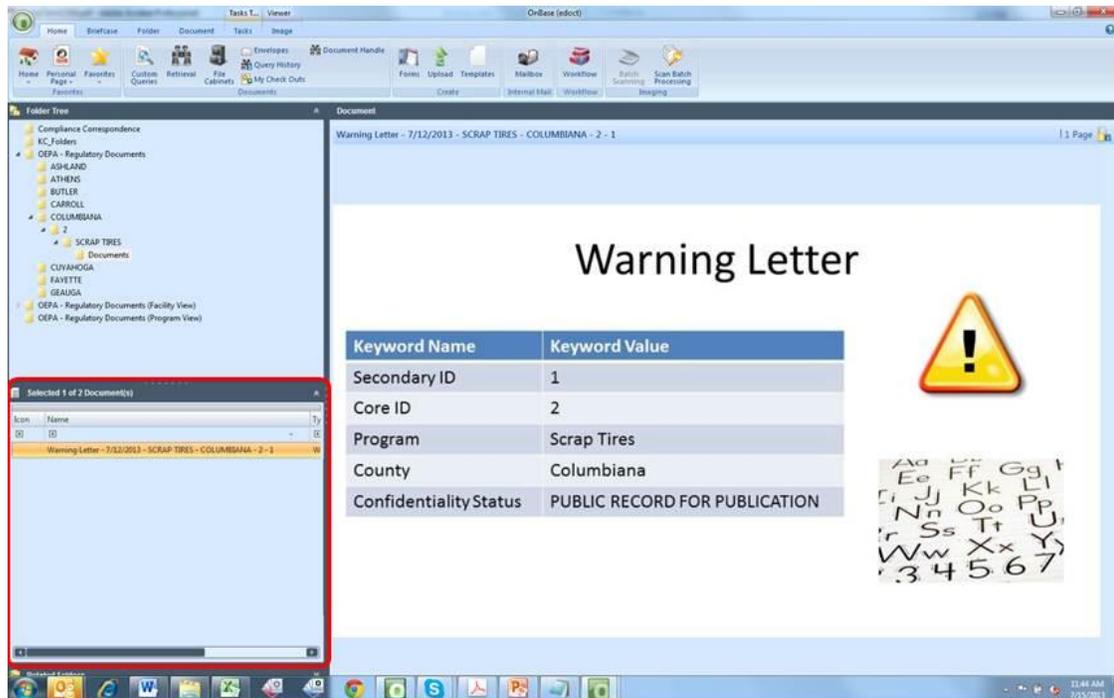


7. Select the **2** folder to drill father into the Regulatory Documents in OnBase with a **Core ID = 2**. The folders displayed under each **Core ID** represent the **Program**. Folders are created dynamically. This means that a folder will only exist if a document with a corresponding **County**, **Core ID** and **Program** exist in OnBase.



8. The **Documents** folder found under the **Program** folder will contain documents that meet the criteria of the folder structure. In this example the **Warning Letter** imported earlier in the class

should be available in the **Documents** pane.



Additional Practice Utilizing OnBase Folders to Retrieve Documents

Navigate to the **Warning Letter** again, this time using the **OEPA – Regulatory Documents (Program View)**. This folder structure will lead users to the same document, but through a different route. The **Program** is the highest level folder. Fill in the information below detailing the structure of the **OEPA – Regulatory Documents (Program View)**.



Searching for Folders

You can search for folders using the **Find Folders** dialog box, which is displayed when you initiate a folder search from the **Folders** window or when you open a folder that is set up for child folder searching.

In this example we will look for all documents related **Columbiana County**.

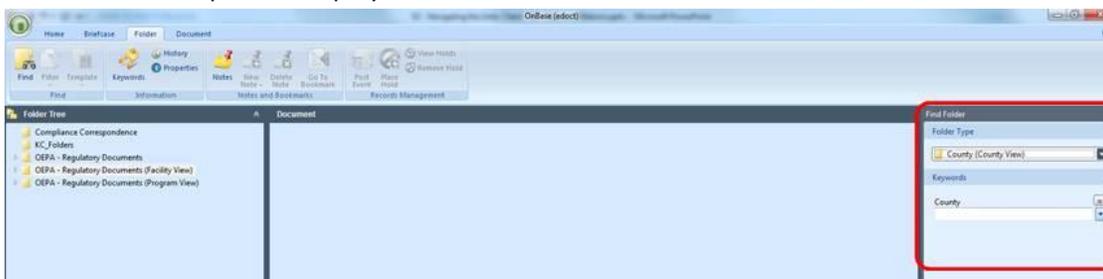
1. Navigate to the **Folder** tab.



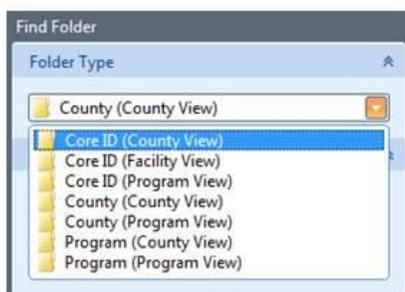
2. Click on the **Find** button.



3. The **Find Folders** pane is displayed.



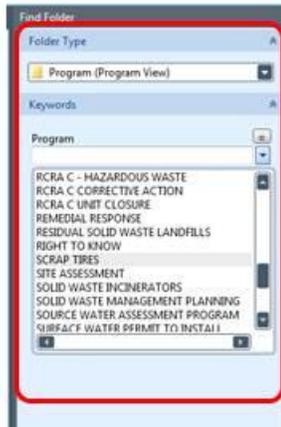
4. From the **Folder Type** drop-down, review the folder options available.



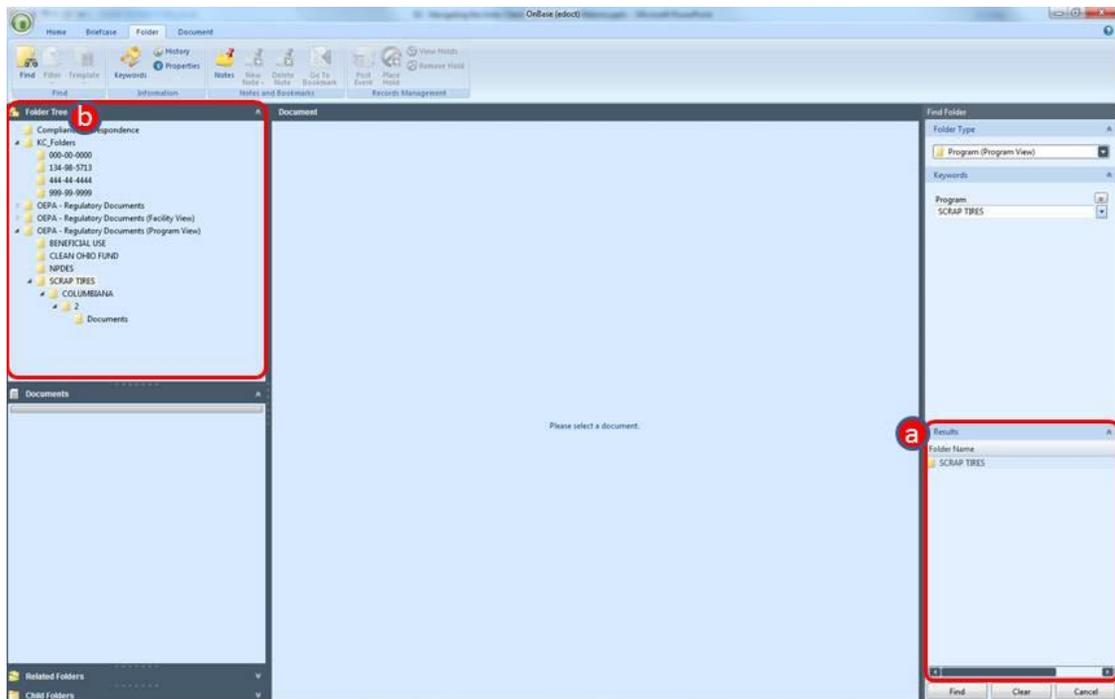
Each **Folder Type** in the drop-down is named based on the search criteria and the folder results that will be displayed. For example, the **Core ID (County View)** prompts users to enter a **Core ID** and/or **County** keywords. When the users selects the **Find** button at the bottom of the **Find Folder** pane, the **Results** pane display any folders that have documents matching the criteria entered.

This functionality is very useful when there are a large number of folders in the OnBase solution.

- To locate the documents related to the **Scrap Tires** program, find the **Program (Program View) Folder Type** and select **Scrap Tires** from the **Program** drop-down.



- Click the **Find** button.
- The Results will be displayed in two places:
 - The **Results** pane will display the **Folder Name** that is related to the search.
 - The **Folder Tree** will open to the resulting folder and will highlight the folder.



Note: If a document does not have a **Core ID** it will **NOT** appear in any folders. Every folder requires that the documents contained within will have a **Core ID**. In the event that the **Core ID** is unknown at the time the document is imported, it will be routed to a workflow and a specified user will determine the **Core ID**.

Copying an Existing Document to Create a New Document

Documents in OnBase can be copied and saved as other documents. In this example we will take the **Warning Letter** we imported in an earlier exercise and save it as a **Judicial Order**.

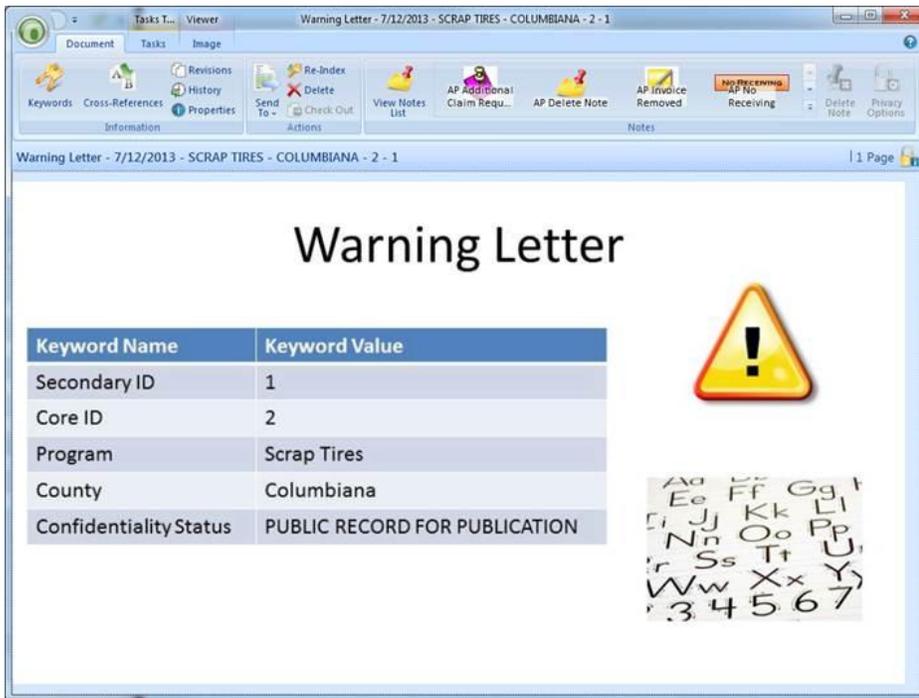
1. Retrieve the **Warning Letter** for **Columbiana County**.

The screenshot displays the OnBase (edoct) interface. The top navigation bar includes 'Home', 'Briefcase', and 'Document'. Below this is a toolbar with various icons for document management. The main area is split into two panes. The left pane, titled 'Document Retrieval', contains a 'Document Types and Groups' list with 'Warning Letter' selected, a 'Keywords and Date Range' section with search criteria, and a 'Full Text Search' section. The right pane, titled 'Search Results: 1 Document(s)', shows a table with one result:

Icon	Name	Type	Date
	Warning Letter - 7/12/2013 - SCRAP TIRES - COLUMBIANA - 2 - 1	Warning Letter	7/12/2013

The bottom of the interface shows a 'Document Viewer' label.

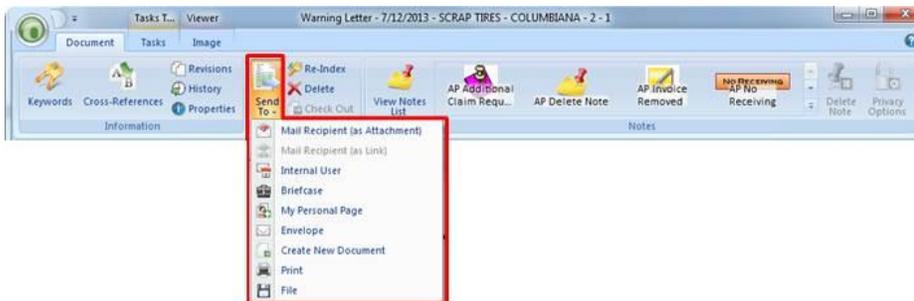
2. Double-Click on the document to open it in the **Document Viewer**.



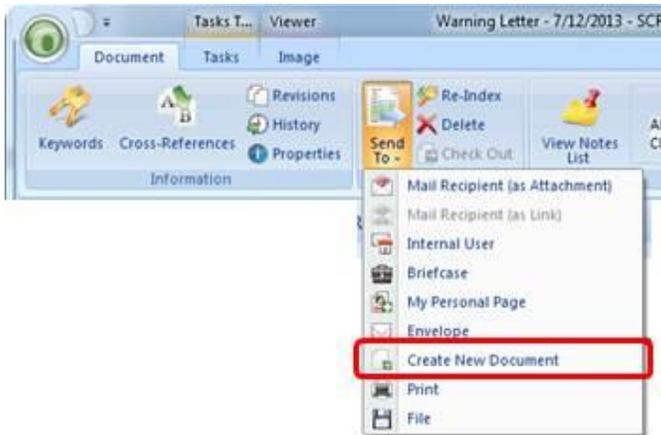
3. Navigate to the **Document Tab**.



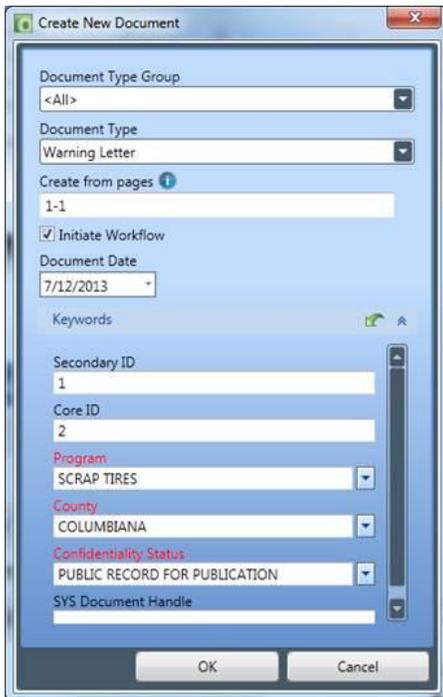
4. Click on the **Send To** button on the **Actions** ribbon.



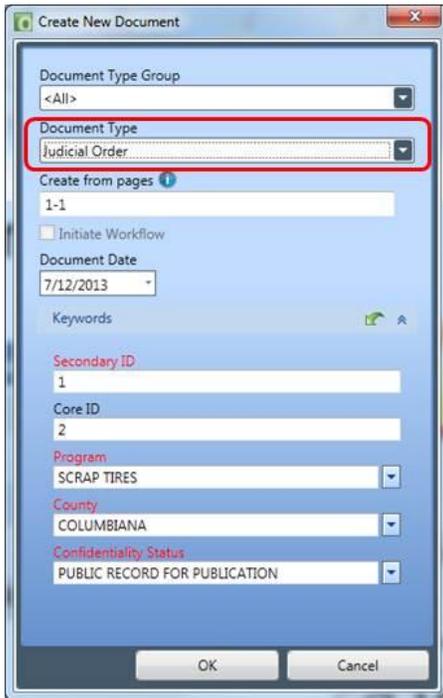
5. Click **Create New Document**.



6. The **Create New Document** dialog will open. Notice the **Document Type** assigned is **Warning Letter** and that the keywords are displayed.

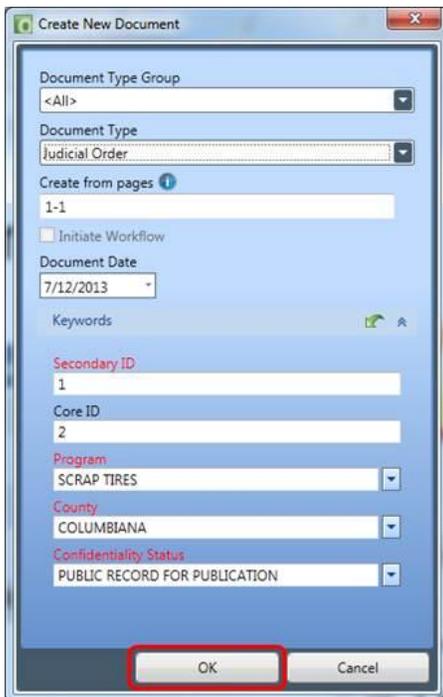


7. To create a new **Judicial Order** based on the **Warning Letter**, change the **Document Type** from **Warning Letter** to **Judicial Order**.



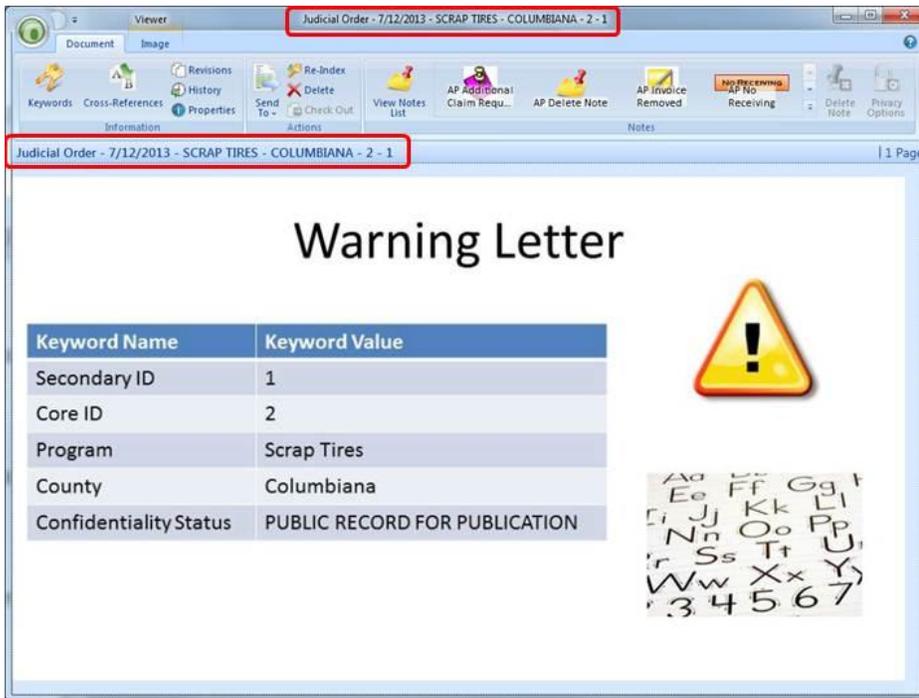
The screenshot shows the 'Create New Document' dialog box. The 'Document Type' dropdown menu is highlighted with a red rectangle and contains the text 'Judicial Order'. Other fields include 'Document Type Group' set to '<All>', 'Create from pages' set to '1-1', 'Initiate Workflow' unchecked, 'Document Date' set to '7/12/2013', 'Keywords' empty, 'Secondary ID' set to '1', 'Core ID' set to '2', 'Program' set to 'SCRAP TIRES', 'County' set to 'COLUMBIANA', and 'Confidentiality Status' set to 'PUBLIC RECORD FOR PUBLICATION'. The 'OK' and 'Cancel' buttons are at the bottom.

8. There is no need to update the keywords, as this document is for the same **Secondary ID**, **Core ID**, **Program**, and **County**.
9. Click **OK** to create a copy of the **Warning Letter** that will be saved as a **Judicial Order**.



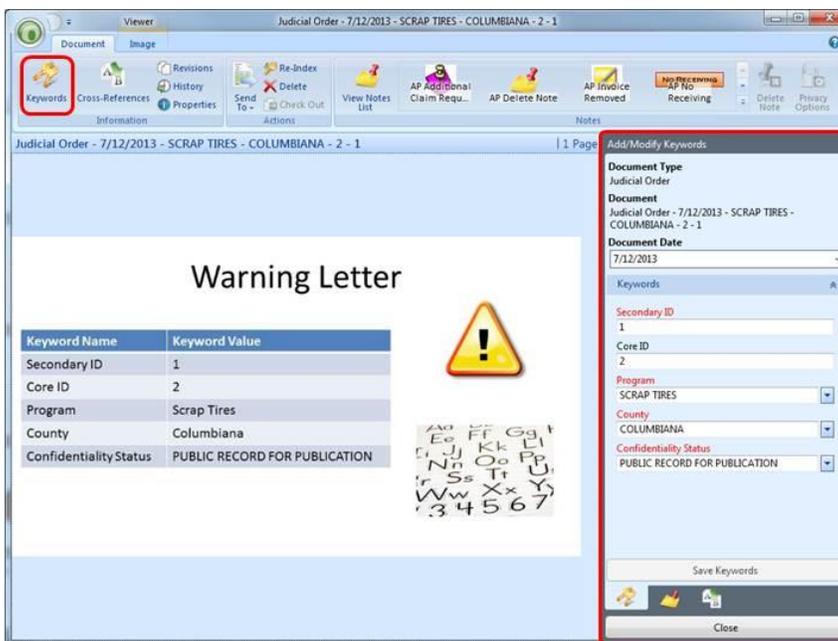
This screenshot is identical to the previous one, but the 'OK' button at the bottom left is highlighted with a red rectangle.

10. The new document will open in the **Document Viewer**.



Note – This may look like a **Warning Letter** but this particular document is being stored as a **Judicial Order**. If a user were to retrieve all **Judicial Orders**, this document would be returned.

11. Click on the **Keywords** button on the **Information** ribbon to verify that the **Document Type** is **Judicial Order** and that the keywords were successfully copied from the **Warning Letter** to the **Judicial Order**.

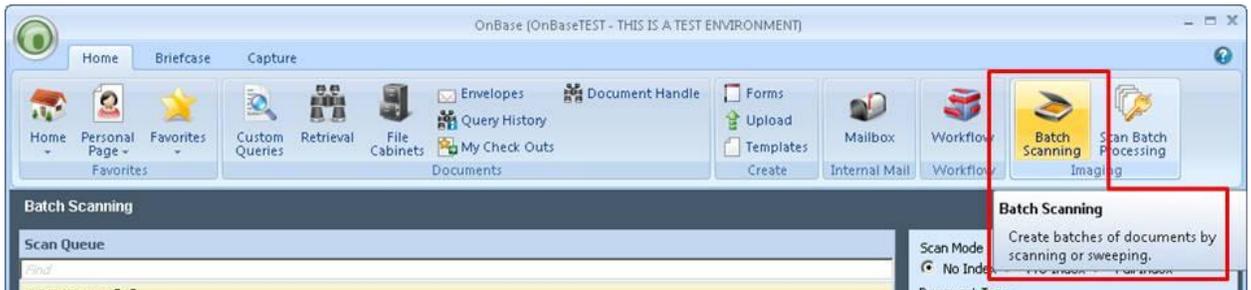


Scanning a Document into OnBase

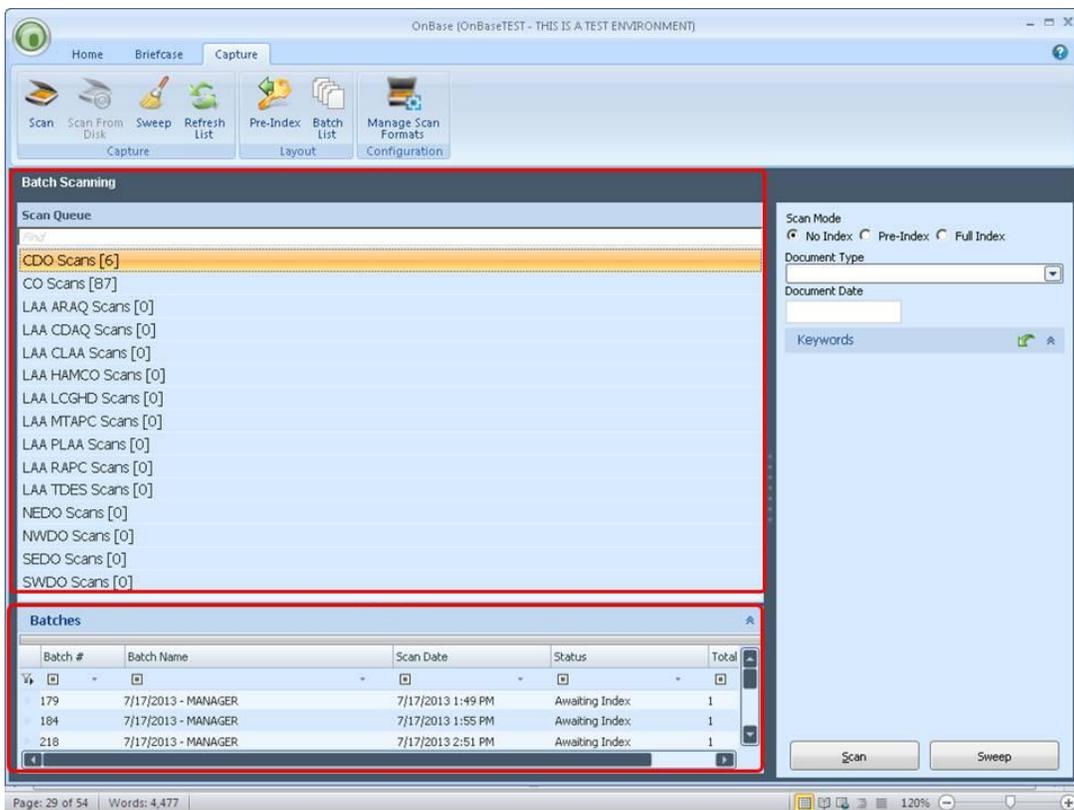
The Ohio EPA OnBase solution includes scanning. This feature of OnBase allows users to utilize a piece of hardware (a scanner) to create an electronic version of a document which can be stored in OnBase.

In this example we will scan a batch of documents into OnBase.

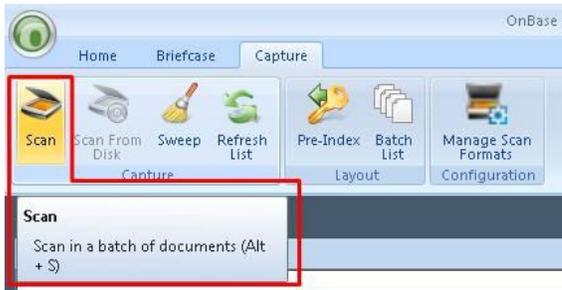
1. In the OnBase Unity Client, click the **Batch Scanning** button on the **Imaging** ribbon.



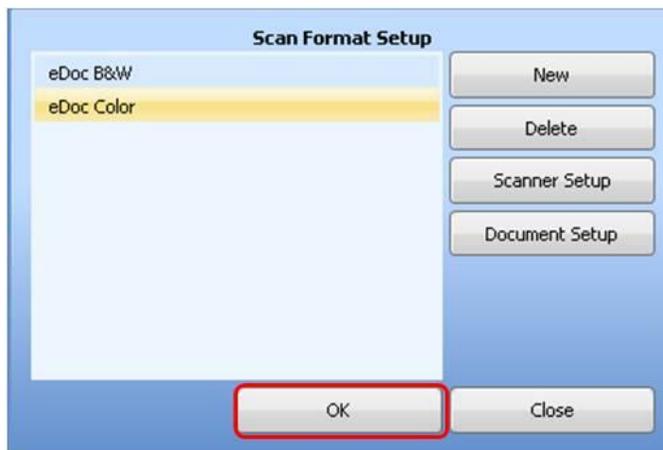
2. The **Batch Scanning** interface will display. This dialog contains 3 panes. **Scan Queues** define the document types and settings for the documents being imported. **Batches** display the groups of documents that have been scanned into OnBase as well as their current status.



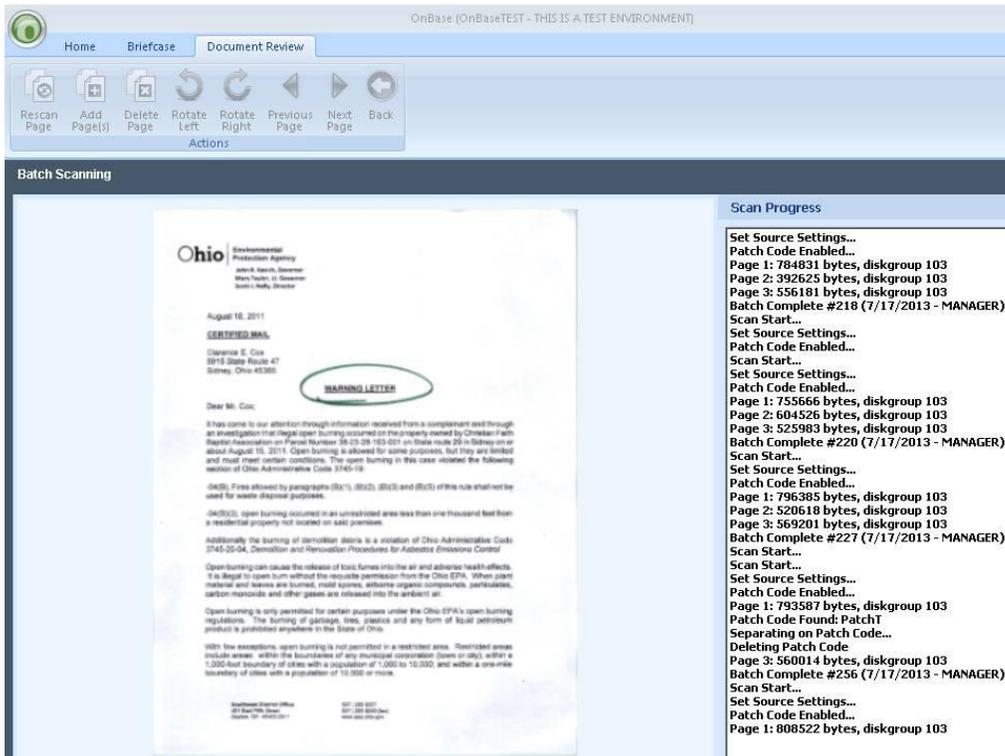
3. Click the **Scan** button.



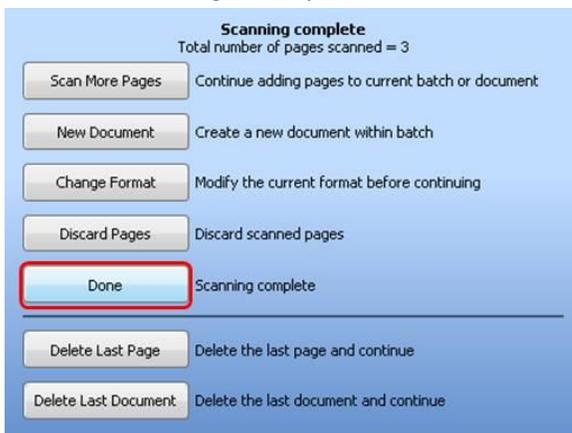
4. Choose the Scan Format that best matches the documents that will be scanned into OnBase. In this case there are two Scan Formats, one for black and white documents and another for color documents.
5. Click **OK**.



- The documents will be scanned into OnBase and, depending on the settings in each location, a preview of the document may be displayed.



- Once the scanning is complete click **Done**.



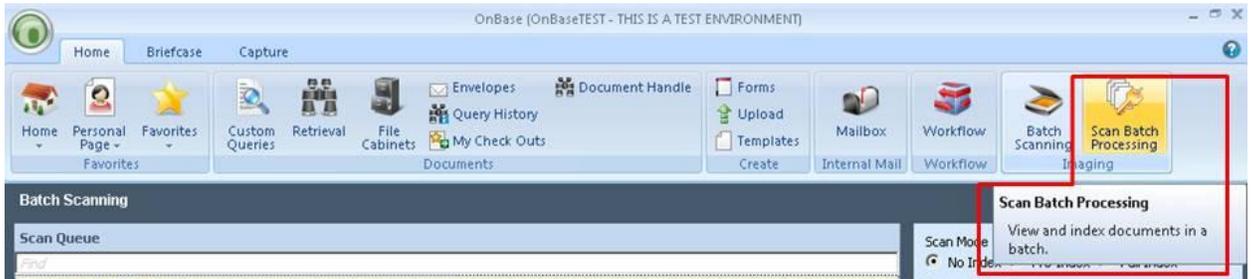
Note: There are additional options available on this dialog in the event more pages need to be scanned or the scan was unsuccessful.

Indexing a Document from a Scan Queue

Once documents have been scanned into OnBase users will need to index the documents. Indexing assigns keywords to the documents to allow for efficient document retrieval.

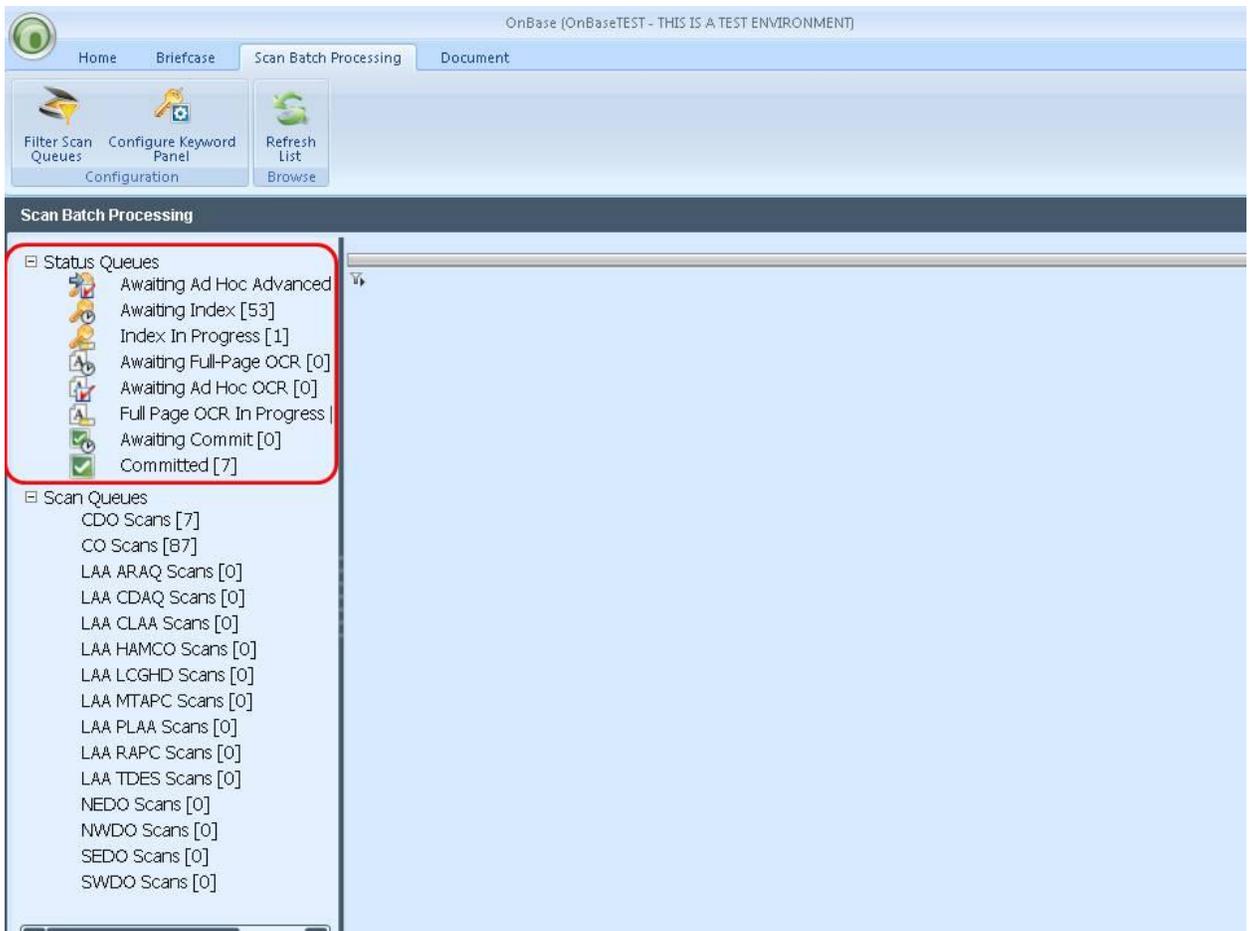
In this example we will assign the Document Type to each document as well as the appropriate keywords.

1. Return to the **Home** tab and select the **Scan Batch Processing** button.

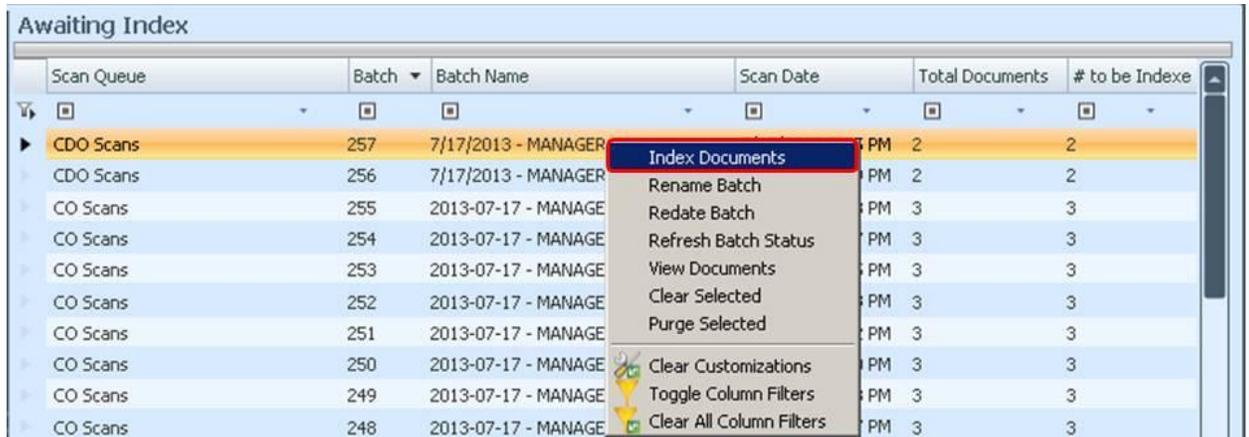


2. The **Scan Batch Processing** pane displays **Status Queues**. Batches of scanned documents will pass through any number of configured queues.

Note: The availability of **Status Queues** is dependent on user security.



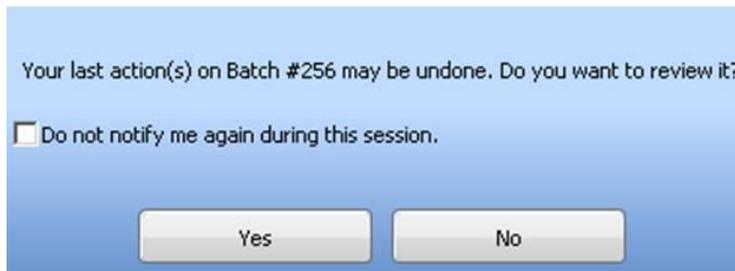
3. Click on the **Awaiting Index** queue to view the batches that have been scanned into OnBase and have not yet been indexed.
4. Select a batch in the **Awaiting Index** pane.
5. Right-click on the batch and select **Index Documents**.



6. In the **Batch Indexing** dialog, review the document.
7. Select the corresponding Document Type from the **Document Type** dropdown. Upon selecting the Document Type, the specific keywords assigned will be displayed.



8. Utilizing the information on the document, enter the appropriate keyword values for each keyword.
9. Click the **Index** button to store the document in OnBase with the assigned keyword values.
10. If this is the first time you have scanned on this machine an additional dialog box may appear.



This message notifies users that they have the opportunity to review the indexing values entered before moving the batch of documents onto the next **Status Queue**. Selecting **Yes** will

return users to the Indexing dialog while selecting **No** will return users to the batches in the **Awaiting Index** queue.

11. From the **Awaiting Index** queue users can continue to index batches.

The screenshot shows the OnBase Scan Batch Processing interface. The window title is "OnBase (OnBaseTEST - THIS IS A TEST ENVIRONMENT)". The navigation bar includes "Home", "Briefcase", "Document", and "Scan Batch Processing". Below the navigation bar are buttons for "Filter Scan Queues", "Configure Keyword Panel", "Refresh List", and "Browse". The main content area is titled "Scan Batch Processing" and is divided into two sections: "Status Queues" and "Awaiting Index".

Status Queues

- Awaiting Ad Hoc Advanced
- Awaiting Index [91]
- Index In Progress [2]
- Awaiting Full-Page OCR [1]
- Awaiting Ad Hoc OCR [0]
- Full Page OCR In Progress
- Awaiting Commit [0]
- Committed [7]

Scan Queues

- CDO Scans [7]

Awaiting Index

Scan Queue	Batch	Batch Name	Scan Date	Total Documents	# to be Indexe
CO Scans	255	2013-07-17 - MANAGER	7/17/2013 3:48 PM	3	3
CO Scans	254	2013-07-17 - MANAGER	7/17/2013 3:47 PM	3	3
CO Scans	253	2013-07-17 - MANAGER	7/17/2013 3:45 PM	3	3
CO Scans	252	2013-07-17 - MANAGER	7/17/2013 3:43 PM	3	3
CO Scans	251	2013-07-17 - MANAGER	7/17/2013 3:42 PM	3	3
CO Scans	250	2013-07-17 - MANAGER	7/17/2013 3:40 PM	3	3
CO Scans	249	2013-07-17 - MANAGER	7/17/2013 3:38 PM	3	3
CO Scans	248	2013-07-17 - MANAGER	7/17/2013 3:37 PM	3	3

Verifying that a PDF Rendition Exists for an Image

A rendition is a copy of an original document that is saved in a different file format. The Ohio EPA OnBase solution will include PDF renditions of image documents. Documents are scanned into OnBase as image files and will be copied and saved as a PDF with searchable text.

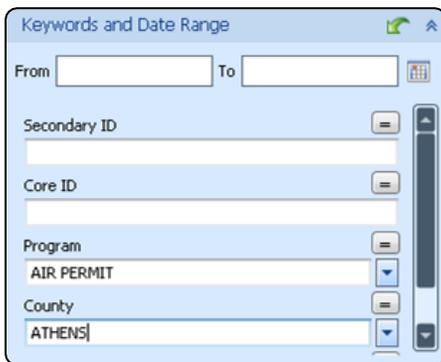
When a document is retrieved using the standard document retrieval, the image document will open by default. However, the text-searchable PDF file is related to the original image file and can be accessed from the image file.

When a document is retrieved using Full Text Search the PDF will open by default. (This will be covered in the next section.)

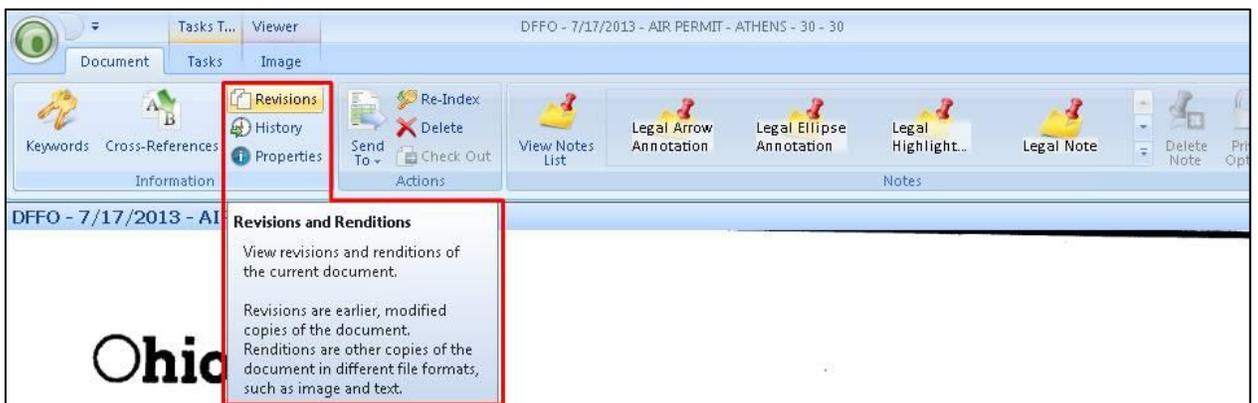
To view renditions for a document, or to determine if a rendition exists, the **Revisions** button on the **Information** ribbon on the **Document** tab is the place to go.

In this exercise we will retrieve an image document that has a PDF rendition.

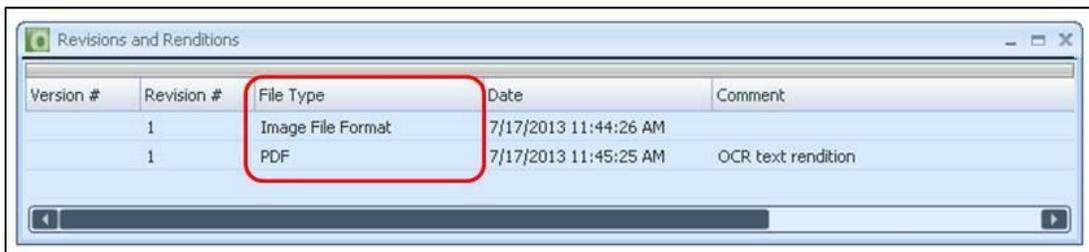
1. Using standard document retrieval find the **DFFO** document(s) with the following keywords:



2. Double-click to open the document.
3. On the **Document** tab, locate the **Information** ribbon and click the **Revisions** button.

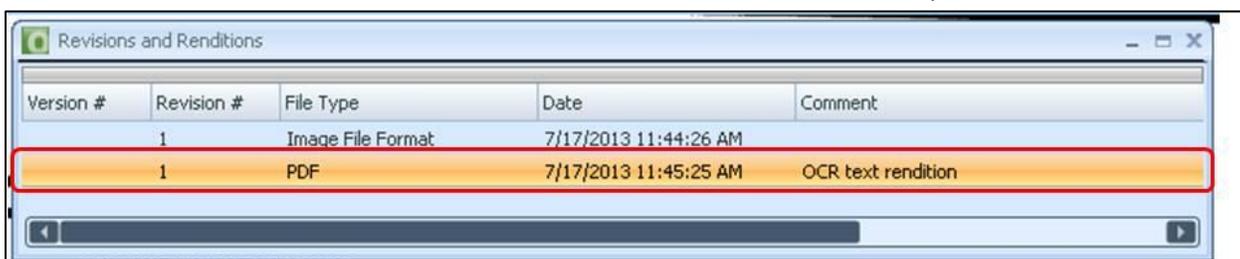


- The **Revisions and Renditions** pane will open. From this view you can see that there are two different **File Types** available for this document.



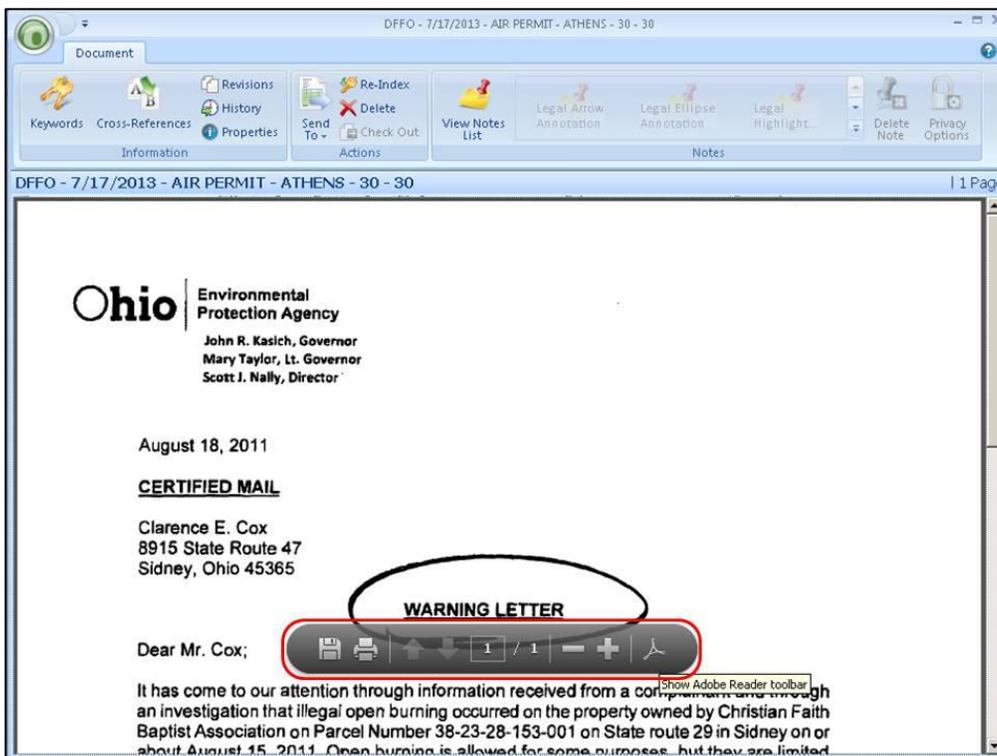
The **Image File Format** is the scanned in image. It is an image file and is not text-searchable. The **PDF** is a separate document with the same information but it is text-searchable. Both formats have the same keywords.

- To view the **PDF** double-click on the line item in the **Revisions and Renditions** pane.

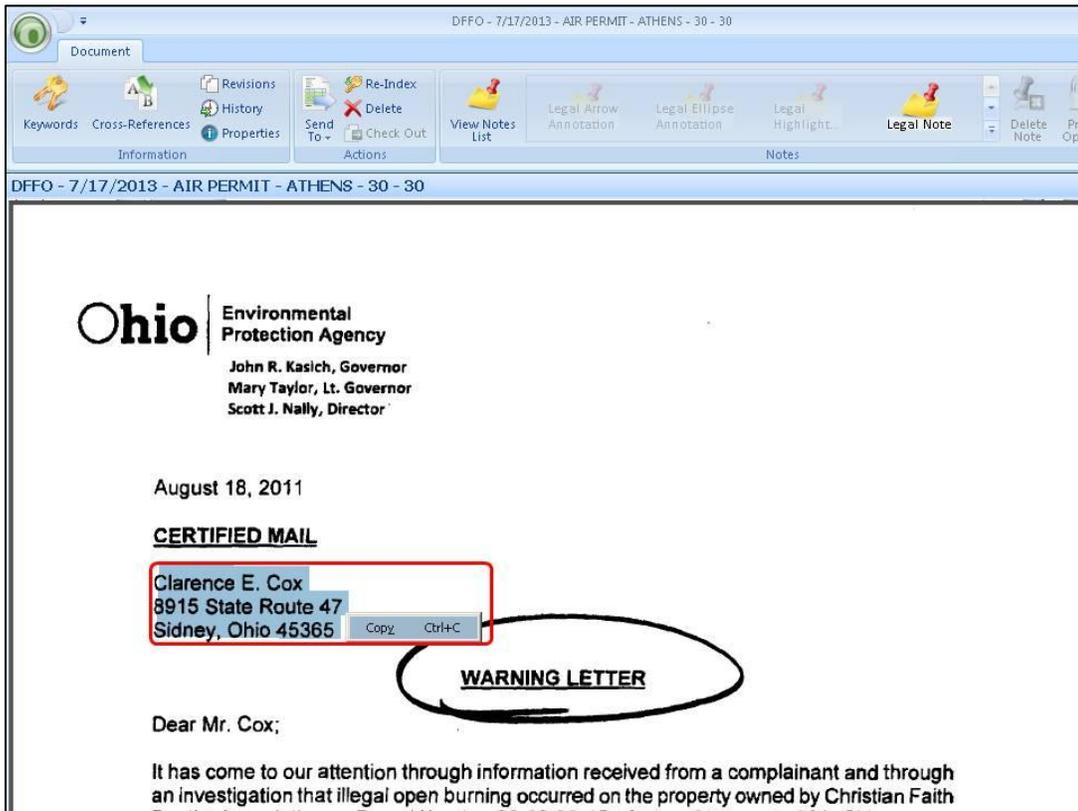


- The PDF will be displayed.

Note: Because OnBase utilizes the native PDF viewer, it may take a moment for the document to open.



7. Because this document is a text-searchable PDF, users can select text, copy text and perform additional text searches.



Utilizing Full Text Search to Retrieve Documents

The Ohio EPA OnBase solution will allow users to utilize text search to perform document retrieval. For example, a user may be trying to find an **RTC** (Return to Compliance) document for a case in the city of Miamisburg that happened in July of 2008. Because city is not a keyword for the document, users cannot filter the results by the city. Using a Full Text Search users can enter “Miamisburg” in the **Search Text** under the **Full Text Search** pane as well as any keywords know, to retrieve documents with the word “Miamisburg” anywhere on the document.

1. Navigate to the **Home** tab and click the **Retrieval** button.
2. Select the **RTC** Document Type and enter the following date range into the **Keywords and Date Range** pane.



If you know what **County** Miamisburg is in, you can enter it in the **County** keyword field.

3. Additionally, enter **Miamisburg** as the **Search Text** in the **Full Text Search** pane.



4. Click **Find**.
5. The **Search Results** for a Full Text Search include columns for **Score**, **Name**, **File Type**, and **Summary**.



Score	Name	File Type	Summary
91.04	RTC - 7/29/2008 - RCRA C - HAZARDOUS WASTE - MONTGOMERY - 318166 - OHD986980274	PDF	Mail Mr. Chuck George Int Environmental

Note: The **Score** indicates how closely the document matches the search criteria. The score is a percentage based on the number of matches compared to the total amount of text in the document. The higher the score, the more likely it is the document the user is searching for.

6. Double-click on the document to open it.

7. The PDF rendition of the document will open. The value entered in the **Full Text Search** will be highlighted in yellow.



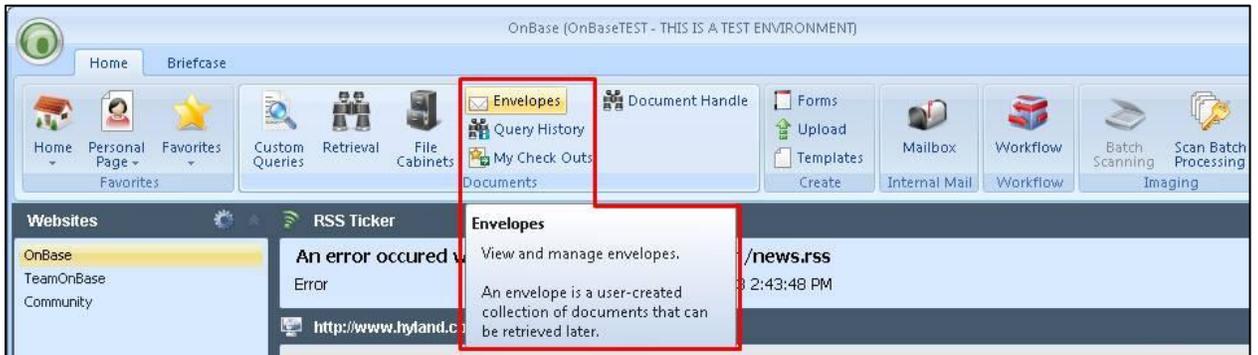
Envelopes

Envelopes provide a way to bundle documents together for easy access.

For example, an inspector may want to pull up a **NOV** (Notice of Violation) for a facility and doesn't want to search for the document every time. Inspectors may even create envelopes for each facility.

In this example users will create an envelope for Hertz, add documents to the envelope and retrieve the envelope.

1. Click the **Envelopes** button on the **Documents** ribbon.



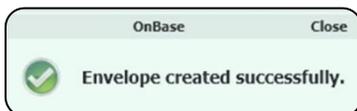
2. The **Envelopes** tab will display.
3. Click the **Create Envelope** button.



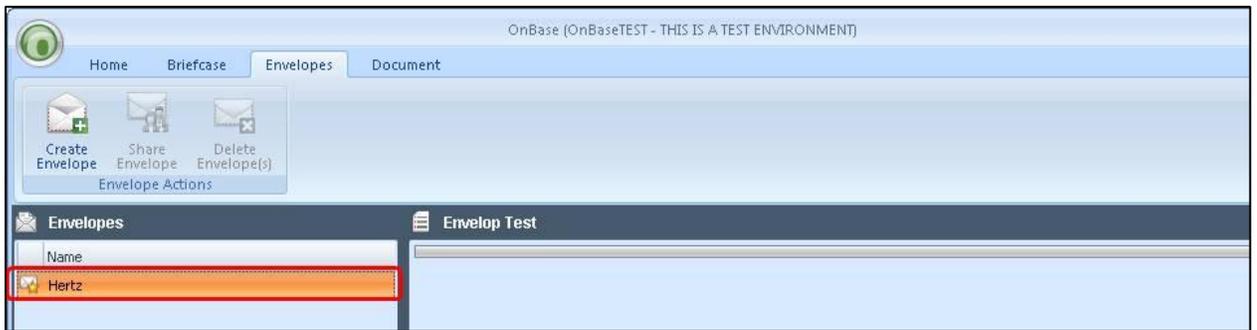
4. Enter **Hertz** for the name of the new envelope.



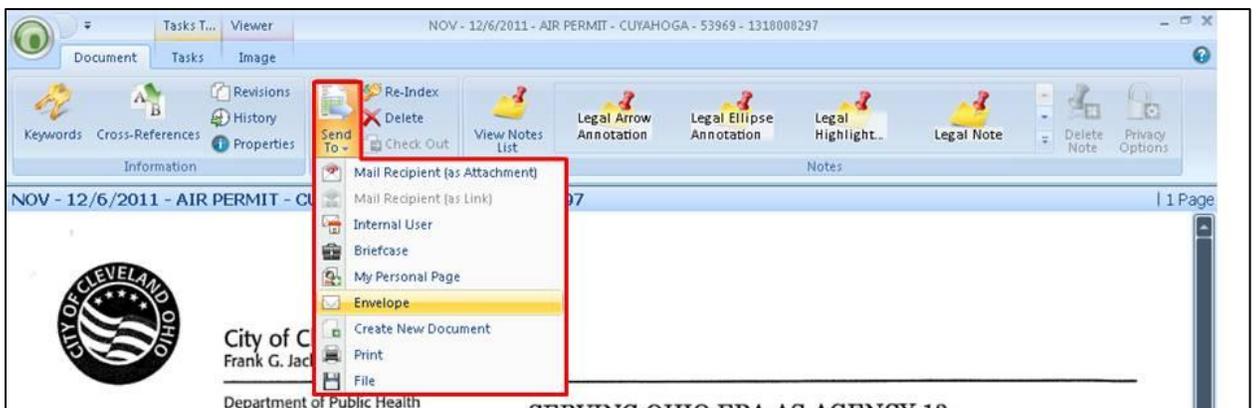
5. Click **OK**. OnBase will confirm that the envelope has been created.



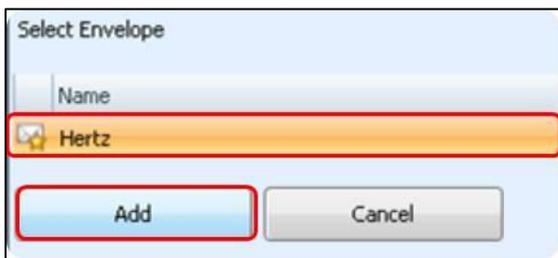
6. Verify that the envelope has been created.



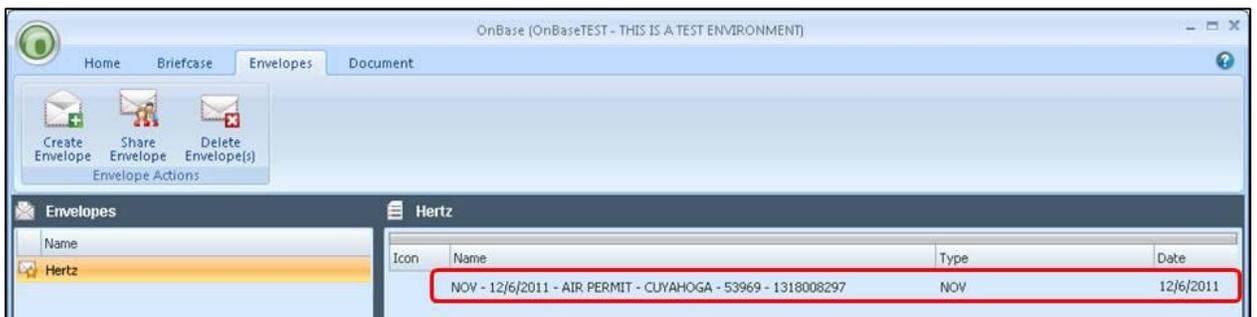
7. Return to Document Retrieval.
8. Utilizing a Full Text Search, retrieve all **NOV** documents for **Hertz**.
9. Select the document(s) from the hitlist and click the **Send To** button and select **Envelopes**.



10. Select the **Hertz** envelope and select **Add**.



11. Return to the **Home** tab and select the **Envelopes** button.
12. Verify that the document(s) reside in the envelope.



Annotations

Documents can be marked up with arrows, ellipses, highlights and overlapping text using **Annotations**. Annotations are available from the **Notes** ribbon on the **Documents** tab.

For this example users will retrieve and mark up a BCA.

1. Retrieve **BCA** document(s) for Greene County.
2. Open a document.

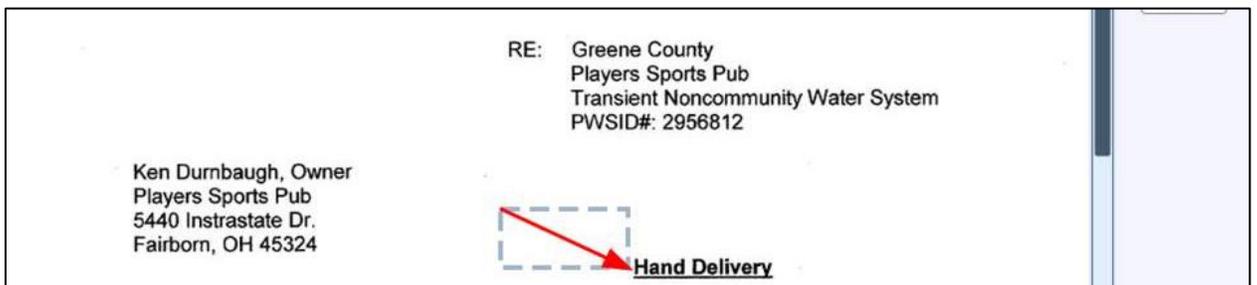


3. Select the **Legal Arrow Annotation**.

OnBase will prompt users to *Left-click and drag to draw a note, right-click to cancel note creation.*



4. Left-click and drag to draw an arrow to the text "HAND DELIVER" on the document. Release the left mouse button.



5. Enter appropriate text into the comments for the annotation.



6. A **Note Count** icon is now available alerting users that there is a note associated with the document. Users can click on the icon to open the **Notes** pane.



Additional Practice: Add a **Legal Ellipse Annotation** or a **Legal Highlight** to the document.

Review

1. **Upload** any document from C:\Ohio EPA\Regulatory Documents,
2. **Index** the document accordingly.
3. Retrieve the document using **Document Retrieval**.
4. **View Keywords** for the document.
5. Utilize **Folders** to find the document you uploaded.
6. **Re-Index** the document, updating the **County** keyword value.
7. **Copy** the document, saving the new document as a different Document Type.
8. Create a new **Envelope**.
9. Add at least two documents to the Envelope.
10. Retrieve an image document and add **Annotations** to the document.
11. Utilize a **Full Text Search** to retrieve documents. Consider a word that would be included in the Document Type you are retrieving.

Definitions

AutoFill Keyword Set

AutoFill Keyword Sets are used to automate and standardize data entry. When applied to Document Types, AutoFill Keyword Sets increase the speed and accuracy of indexing, especially when indexing large volumes of documents.

- An AutoFill Keyword Set is a configuration of Keyword Types that includes a Primary Keyword Type and one or more Secondary Keyword Types.
- If an AutoFill Keyword Set is assigned to a Document Type, each set of Keyword Values (the Primary Keyword Value and its corresponding Secondary Keyword Values) can be considered an instance.
- A value entered into the Primary Keyword Type field during indexing of a document triggers the population of the remaining Secondary Keyword Types.

Document

A document is a piece of information that your organization has chosen to store electronically in the system. Letters, contracts, scanned images of contracts, photographs, and e-mail messages are all examples of documents.

Documents can be retrieved based on Keyword Values that are associated with the document. Storing documents in the system eliminates the need for paper documents. Documents can be revised, viewed, annotated, and tracked within the system.

Document Type

Each document that is brought into the system is assigned to a Document Type. Document Types group together documents with similar characteristics. For example, a Document Type of **Judicial Order** might be used to define image files of judicial orders. Document Types allow you to work with groups of documents rather than individual documents. For example, you can limit your document searches to only those documents of a certain Document Type.

Document Type Group

A Document Type Group represents a logical grouping of Document Types in the database. Document Type Groups allow the system to organize, search for, and locate a document more efficiently.

Envelope

You can place any documents you want into an envelope, regardless of whether they have anything in common. When an envelope is opened, it displays a list of documents that have been placed in it. Envelopes provide you with a way to group documents together for easy access. Only the envelope's creator can view that envelope. Envelopes are an alternate way to retrieve documents; the documents remain accessible through standard document retrieval methods.

File Cabinet

A file cabinet is the highest organizational unit in a folder hierarchy. The file cabinet helps organize folders for easy retrieval. You can place OnBase folders into different cabinets just as you would physically with paper folders.

Image Documents

Image documents, such as pictures of real estate can come from several native file formats, such as .tiff, .jpg, or .bmp. Once they are imported into the system, they are stored in their native file format. If the file does not have a native file format when imported, it will be stored as the chosen File Type.

Keyword Types

Keyword Types and Keyword Values provide the ability to assign descriptions to documents. Effective indexing and classification of Document Types is essential for efficient document management and retrieval.

The system administrator assigns all Keyword Types to documents in your system.

Every Document Type has associated Keyword Types. For example, the **Warning Letter** Document Type has the **Secondary ID**, **Core ID**, **Program**, and **County** Keyword Types assigned to it.

A Keyword Type may be used for many different types of documents. For example, you can use a Keyword Type Amount for almost any Document Type for which you need to store an amount.

The system administrator sets up Keyword Types for each Document Type.

Keyword Values

Keyword Types and Keyword Values provide the ability to assign descriptions to documents. Effective indexing and classification of Document Types is essential for efficient document management and retrieval.

When a document is indexed, its Keyword Types are assigned Keyword Values. A Keyword Value is the specific value that helps to identify documents in the system.

- Some Keyword Types require their values to be a specific format, such as a date, a number, or a currency value.
- Some Keyword Types will have default values assigned to them, so when you import a document into the system, the default value is displayed in the Keyword Type field.
- Some Keyword Values display automatically on an open document.

Text Documents

Text-based documents have special features available for selecting or searching text. Examples of text-based documents in the system are ASCII files, PCL documents, text renditions of image documents, text-based documents such as checking statements that have been imported into the system, and system reports or verification reports created during processing.

All text documents in the system are read-only, thus the contents of the text documents themselves can never be modified or deleted. The associated attributes however, such as Keyword Values, notes, file types or Document Types, can be modified by a user with the appropriate rights. Users with Delete

document rights can delete the whole text document, not delete its contents.

Text documents have specific buttons, which are different from the buttons and options available to image documents.

User

Each person using the system is known as a user. When a user logs onto the system, he or she supplies a unique user name and a password.

This allows greater flexibility for system operation. For example, each user can configure his or her workstation settings with personal preferences.

User Group

A system User Group is similar in concept to a user group on your network. User Groups are granted rights to access system functionality.

Access to various resources, such as scan queues and Document Types are controlled by User Group rights. A user can be a member of multiple User Groups, in which case the user has access to the sum of all functionality granted for each group.

User Groups provide easier administration because new users inherit the access rights of the group to which they are assigned.