

### DESCRIPTION:

This instructor lead session is designed for New, Very New and Experienced OnBase Users. System administrators will also find this class beneficial to refine the skills that will help support and train their Users. A great session for the entire team.

### NOTE:

This is not a hands-on technical configuration session. Instructions with time for questions and examples to support the question and answer dialog.

### TOPICS:

#### User Interfaces

- Thick Client
- Unity Client
- Web Client
- Outlook Client

#### Retrieval

- Basic Retrieval
- Custom Query Retrieval
- Configuring Custom Queries
- Cross Reference
- Configuring Cross Reference

#### Application Enabler

- High Level Overview
- Steps to a successful deployment
- Examples for common Line of Business Integration
  1. CMDconcrete
  2. Integra
  3. Apex
  4. Accounting Software
  5. Other 3<sup>rd</sup> party applications

#### Folders

- Overview
- Examples to make OnBase easier to use for the casual use

#### Scanning

- Scan Queues
- Scan Options
  1. Scan from Disk
  2. Desktop Scanning
  3. Production Scanning
  4. Disconnected Scanning
  5. Unity Scanning



### **OnBase Integration with Microsoft Office**

- Word
- Excel
- Outlook
- Power Point

### **Projects for Departments beyond Accounting**

- Overview
- Examples to make OnBase easier to use for the casual use

### **Additional Topics as time allows**

- OnBase in the Cloud
- ShareBase
- Workview
- Workflow
- Versions and Next Steps

