



Information Access Systems

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## Course Title

OnBase for the Business User

## Course Length

1 day

## Course Format

This course is delivered online in a virtual classroom. This course is a combination of lecture presentation, small group activities, as well as hands on labs.

## Course Description

The purpose of this course is to drive innovation from inside an organization. Participants in this course will be exposed to the robust tools that exist natively in the OnBase thick client. Each set of tools will be shown solving a series of predetermined business problems. Participants will be challenged to come up with business problems they encounter and how OnBase could be used to solve these problems.

## Course Objectives

At the end of this course, participants will have been exposed to use of the following as they relate to OnBase:

- Document retrieval
- Custom queries
- File cabinets and folders
- Working with image documents
- Working with text documents
- Working with pdf/ Microsoft Word documents
- Cross references
- Notes
- Annotations
- Envelopes
- Customizing the OnBase toolbar
- Importing documents (drag and drop)
- Exporting documents (print, email, save as)
- Creating basic document based reports
- Exporting reports to Microsoft Excel
- Redaction
- Additional Tips and Tricks