



Information Access Systems

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Course Title

OnBase File Cabinet and Folders

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, and hands on labs.

Course Description

The purpose of this course is to present a business problem that standard document retrieval does not solve. Participants will see how OnBase folders are capable of solving problems that other OnBase retrieval mechanisms are not. Participants will see a folder configuration first hand in the effort of supporting a predefined business problem. Participants will configure these folders as part of this course.

Course Objectives

At the end of this course, participants will have seen and performed the following as they relate to OnBase:

- Use of and positioning folders, document retrieval, and custom queries
- Creation of file cabinets
- Creation of folders
- Explore use of more common options
- Creation and use of folder templates
- Use of dynamic folders vs static folders
- Dynamic folders based on keyword(s)
- Dynamic folders based on document date
- Auto folder new documents as part of a process
- Auto folder existing documents