

## Introduction to Installation

### Goal

To provide a foundation of skills and knowledge necessary for basic installation, configuration and maintenance of an OnBase solution.

### Course Description

The Introduction to Installation course guides technical OnBase professionals through the installation process for an OnBase solution. The class focuses on pre-installation requirements and takes students through the OnBase configuration process. Installation procedures are discussed in-depth, with many opportunities for gaining hands-on experiences using sample business scenarios. Upon completion of the course, students should be able to install an OnBase system under the guidance of an OnBase Certified Installer.

### Topics Covered

- Installer Certification Program
- Pre-Installation Guidelines
- Installation Guidelines
- OnBase System Structure
- Client configuration
- Automated Processing
- Client Administration
- Licensing
- Security Models
- Data Storage Systems
- OnBase Objects
- Cross-Referencing
- Custom Queries
- AutoFill Keyword Sets

### Certifications

This course fulfills the requirement for:

- ▶ OnBase Certified Application Programming Interface (**Customer**)
- ▶ OnBase Certified Installer (**Partner**)
- ▶ OnBase Certified Workflow Engineer (**Partner**)

## Measurement

The course has two elements that must be completed successfully. The first is a solution design based on provided business requirements. This design will require the installer to identify the correct modules and configuration to meet the customer requirements. The second element is a practical examination in which the installer must design and implement a complete OnBase solution based on the results of a customer discovery.

## Prerequisites

- ▶ Pre-Installation: Welcome to OnBase

## Course Agenda

All topics are subject to change and may not appear in the order indicated here.

### Day 1

- OnBase Review
- Database Installation
- Disk Groups Configuration and Best Practices
- Keyword Configuration
- Document Type Groups Configuration
- Document Imaging
- Customization of the OnBase client

### Day 2

- Modify Document Types and Scan Queue
- Keyword Configuration
- Purging Batches
- Export/Import Scan Formats
- Autofill Keyword Set configuration
- Fix indexing mistakes

### Day 3

- OnBase Security
- Web Server installation and use
- Cross-Reference configuration
- DIP (Document Import Processor)
- Scheduling

### Day 4

- COLD (Computer Output to Laser Disc)
- Overlays
- Custom Query configuration
- Administrative Tasks
- Platter Management

### Day 5

- Review
- Practical Exam
- Multiple Choice Exam