

System Administration

Goal

Essential OnBase for System Administrators, the course provides attendees with the knowledge necessary to effectively monitor, maintain and troubleshoot their OnBase implementation.

Course Description

The System Administration course is designed to introduce new and existing OnBase System Administrators to the use, maintenance and administration of OnBase. The class provides in-depth, hands-on experience that directly maps to the day-to-day activities of an OnBase System Administrator. The class also investigates effective maintenance strategies and resources available to OnBase System Administrators.

Topics Covered

- OnBase System Structure
- OnBase Licensing
- Data Storage Systems
- OnBase Objects
- Security Models
- Client Administration
- Automated Processing
- Imaging
- AutoFill Keyword Sets
- Custom Queries
- Cross-Referencing
- Troubleshooting & System Administration Tasks

Certifications

This course fulfills the requirement for:

- ▶ OnBase Certified System Administrator **(Customer)**
- ▶ OnBase Certified Advanced System Administrator **(Customer)**
- ▶ OnBase Certified Workflow Administrator **(Customer)**
- ▶ OnBase Certified Advanced Workflow Administrator **(Customer)**
- ▶ OnBase Certified Application Programming Interface **(Customer)**

Measurement

Students will be evaluated on their understanding of OnBase functionality as well as those tasks that a System Administrator is responsible for on a daily basis.

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 Architecture
- OnBase Resources
- OnBase Client Retrieval
- Improving Document Type Configuration
- New Keyword Type Configuration
- Improving Scan Queue Configuration

Day 2

- Pre-Installation Web-based Training Review
- Disk Groups
- New Document Type Configuration
- New Scan Queue Configuration
- Document Imaging
- Autofill Keyword Sets
- OnBase Security

Day 3

- Web Client Retrieval
- Image-based Cross-References
- Document Import Processor
- Scheduling Processes

Day 4

- COLD/ ERM Processing
- Overlays
- Configuring Jobs
- Custom Queries
- Document Maintenance
- Reports and Auditing
- User and Workstation Options
- Platter Management

Day 5

- Review
- Exam