ONBASE DOCUMENT IMAGING TERMINOLOGY

WHAT IS ONBASE DOCUMENT IMAGING?

Document Imaging is a document management application to manage the electronic storage, indexing, retrieval and workflow of scanned and imported documents and forms. The OnBase document structure and user group configurations are basic building blocks of system.

PRODUCT

	Definitions
Hyland Software	The company that owns an application called OnBase, our document imaging application.
OnBase	The software owned by Hyland, our document imaging application.

SOFTWARE CLIENTS

	Definitions
Application Enabler	Application Enabler provides complete interaction between the business applications screen data and the related OnBase documents, content and process management. Users can opt for a real-time display of documents associated with their enabled screen with a simple mouse click or key press.
Full/Thick Client	OnBase desktop application primary used for scanning and indexing documents into the database. This client installation is limited to scan stations only.
Hyland Software	The company that owns an application called OnBase, our document imaging application.
OnBase	The software owned by Hyland, our document imaging application.
Unity Client	OnBase desktop application, offering the familiar look and feel of Microsoft Office products. Does require a small installation on the machine to be used.
Web Client	The Web Client is a Web-based OnBase application which is accessible via your 32-bit Internet Explorer browser.

Basic OnBase Terms

	Definitions
Annotations	Annotations are similar in function to notes. Forms of annotations include: colored highlights with a note attached, arrow, ellipse, overlapped text or an icon stamp. Similar to notes, annotations can have a variety of attributes that affect how they function based on their configuration as well as user group permissions.

Definitions	
Autofill Keyword Set	Their function is to associate a group of Keyword Types with one main (Primary) Keyword Type and automate and standardize data entry. A value entered into the Primary Keyword Type field during indexing of a document triggers the population of the remaining secondary Keyword Values. When applied to Document Types, AutoFill Keyword Sets increase the speed and accuracy of indexing, especially when indexing large volumes of documents.
Auto-name String	The Auto-Name function allows OnBase to give a meaningful name to an item. The most common example would be an auto-name for a document type. The string can use variables containing data about each specific item, for example Keyword Values and/or static text. The results are documents that are descriptive and easily identifiable from a Document Search Results list, a drop-down select list or from a folder tree.
Commit	Committing a scan batch is the act of moving it to the Commit queue. This triggers the system to write a secondary back up copy of the batch. It is considered best practice to regularly commit batches of documents imported via Document Imaging. The interval between commits should be set to something meaningful (i.e., once per day, once per week, once per month) that falls in line with your business needs. There is also an option at the Scan Queue to auto-commit a batch once the indexing is complete.
Cross-Reference	A cross-reference is a relationship between a Document Type and one or more Document Type(s) that share a common keyword value and works in all OnBase Clients. This functionality allows users the ability to quickly and easily view related documents through a simple double-click.
Custom Queries	Custom Queries are another retrieval method in OnBase that differ from using the standard retrieval search or folders. Their goal is to simplify search and retrieval for repeated search tasks.
Document	A document is a piece of information that your organization has chosen to store electronically in the system. Documents can be retrieved based on Keyword Values that are associated with the document. Storing documents in the system eliminates the need for paper documents. Documents can be revised, viewed, annotated, and tracked within the system.
Document Maintenance	Document Maintenance contains all documents users have deleted from the system. OnBases' Recycle Bin similar to the Windows Recycle Bin.
Document Type	Each document that is brought into the system is assigned to a Document Type. Document Types group together documents with similar characteristics. For example, a Document Type of REG – Name Change might be used to define image files of all name change forms received for the Registrar's office. Document Types allow you to work with groups of documents rather than individual documents. For example, you can limit your document searches to only those documents of a certain Document Type.
Document Type Group	Document Type Groups contain Document Types that have common characteristics. Used for easy searching and assigning security. For example, the Document Types of REG – Add/Drop Form and REG Address Change could be grouped together under the Document Type Group of Registrar Student Data.

Definitions	
Duplex Scanning	A feature of computer scanners and multifunction printers (MFPs) that allows the automatic scanning of a sheet of paper on both sides, often with a single pass from the scanner feed tray. Devices without this capability can only scan a single side of a sheet of paper at a time.
File Cabinet	A file cabinet is the highest organizational unit in a folder hierarchy. The file cabinet helps organize folders for easy retrieval. You can place OnBase folders into different cabinets just as you would physically with paper folders.
Folders	Folders provide an additional interface for grouping documents for easy retrieval. This interface consists of file cabinets that contain folders. A folder can contain documents from multiple Document Types.
Indexing	Indexing a document occurs when Keyword Values are assigned to the document.
Keyword Type	Every Document Type has associated Keyword Types. Keyword Types are necessary to search and retrieve the document. Keyword Types can exist on multiple Document Types. For example, UID is used as a primary Keyword Type for search/retrieval on most of our University Files.
Keyword Value	When a document is indexed, its Keyword Types are assigned Keyword Values. A Keyword Value is the specific value that helps to identify documents in the system. •Some Keyword Types require their values to be a specific format, such as a date, a number, or a currency value. •Some Keyword Types will have default values assigned to them, so when you import a document into the system, the default value is displayed in the Keyword Type field. Some Keyword Values display automatically on an open document.
Multifunction Printer (MFP)	An MFP (Multi-Function Product/ Printer/ Peripheral) is an office machine which incorporates the functionality of multiple devices in one, so as to have a smaller footprint or to provide centralized document management. A typical MFP may act as a combination of some or all of the following devices: Scan, Fax, Print, E-mail, Photocopy
Notes	Notes are similar to a post-it note you would attach to a paper document. They are limited to 250 characters of plain text. Similar to annotations, notes can have a variety of attributes that affect how they function based on their configuration as well as user group permissions.
Purge Committed Batches	Once a batch has been fully indexed and committed it resides in the Committed scan queue. A user with the purge committed batches permission is able to permanently delete an entire batch from this queue. This action is not reversible and the image file is completely removed from the OnBase system.
Purge Scanned Batches	If the scanning process was not successful a user with this permission can purge the batch, modify the scan format and rescan the documents into OnBase for processing.
Re-Index	Re-indexing a currently indexed document lets a user change the Keyword Values or Document Type of an already indexed document. This is permissions based and controlled by User Group permissions.
Scan Format	A scan format contains information about the scanner settings, size of documents, and file compression for the scanned documents. Scan Formats must be setup and selected in order to scan in documents using the OnBase client.

Definitions	
Scan Queue	A scan queue is a processing queue for scanning in document images. Each scan queue can have a variety of document types, user groups and processing options assigned based on business need.
Scanning	Scanning is the act of using an attached scanner to bring in a document image into OnBase for processing.
Simplex Scanning	Scanning a single side of a sheet of paper at one time.
User	Each person using the system is known as a user. When a user logs onto the system, he or she will use their University CatID user name and a password.
User Group	User Groups are granted rights to access system functionality. Access to various resources, such as scan queues and Document Types are controlled by User Group rights. A user can be a member of multiple User Groups, in which case the user has access to the sum of all functionality granted for each group.