

A+ in OnBase - OnBase Best Practices and Customer Care Primer

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The Report Card

HOW TO GET AN A+ IN ONBASE

Get an A+ in OnBase

REPORT CARD

SUBJECT	GRADE	COMMENTS
Understands and follows the rules		
Knowledge and use of OnBase skills		
Completes work assignments on time		
Reasons well in solving problems		
Cooperates well with others		
Assumes responsibility		
Participates in group work		
Resourceful and independent		

Get an A+ in OnBase

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Understands and follows the rules

How to get an A+ in OnBase

- Identify the departments and organization processes your OnBase solution supports
- Observe how end users utilize OnBase to perform their job functions and ask questions
- Identify key process owners in each department

How Customer Care can help

- Provide you with a copy of your original functional specification
- Host a transition to support meeting with new System Administrator
- Conduct a workflow process review with the System Administrator

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Knowledge and use of OnBase skills

How to get an A+ in OnBase

- Obtain OnBase System Administrator certification
- Be an active participant on Hyland Software's Community Site
- Complete additional web-based classes on training.onbase.com
- Attend TechQuest and OTTC
- Attend OnBase Advanced System Administrator and Workflow Administration courses
- Read and love Hyland's System Administration Guide

How Customer Care can help

- Provide System Administrator Welcome kit
- Resource for general technical questions and best practices
- Recommend a training curriculum tailored to your solution
- Direct you to specific technical documents and tools

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Completes work assignments on time

How to get an A+ in OnBase

- Perform regular system maintenance and monitoring
 - Daily
 - Weekly
 - Monthly

How Customer Care can help

- Provide a copy of Hyland's System Administrator guide
- Work with you to create a customized Health-Check plan
- Explain what to look for when reviewing system

Completes work assignments on time

Daily Tasks

- Check Verification Reports (or build a workflow to do it for you)
- Check the Window's Event Logs for any Error, Warning, and even unexpected Informational entries (or find a tool to notify you)
- Check all DIP/COLD/input folders for any files or folders (there should be none)
- Check document and process locks

Weekly Tasks

- Verify database and disk groups were backed up to tape (check the 'A' attribute)
- Ask your backup team how big the OnBase related backup was – it should grow every week
- Check to ensure you have available disk space on the servers *** a database can grow in chunks of 3-4 GB or more at a time, so don't operate too close to the edge

Completes work assignments on time

Monthly Tasks

- Verify database maintenance plans are still operating within the time window you expect
- Check database and disk group sizes and anticipate when additional storage might be needed
- Analyze recent disk group volumes to ensure all files are present and byte-wise compare to 2nd, 3rd, etc. copies to ensure all files are valid (schedule this via platter management)

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Reasons well in solving problems

How to get an A+ in OnBase

- Never assume
- Maintain a current testing environment
- Document resolutions to commonly reported issues
- Review Windows and OnBase logs to identify errors
- Hyland Troubleshooting tools
 - Hyland Community site
 - OnBase Help Files, Technical Knowledgebase and Troubleshooting Checklists
 - OnBase Diagnostics Console
- Utilize specialized troubleshooting tools

How Customer Care can help

- Customer Care Portal for access to previous reported issues
- ImageSoft Toolbox which includes the following tools:
 - ImageSoft Logging Console
 - ImageSoft Memory Monitor
 - ImageSoft Services Monitor
 - Timer Queues Monitor
 - DIP/COLD Directory Monitor
 - Recommend third party troubleshooting tools
 - Process Monitor, Wireshark, Fiddler etc...

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Cooperates well with others

How to get an A+ in OnBase

- Meet with your IT department to discuss their role in supporting your OnBase solution
 - Server/OS management
 - Database maintenance
 - Backup strategy
 - Network infrastructure
 - User security
- Regularly meet with management and business owners to reinforce the business value of the OnBase solution and their challenges

How Customer Care can help

- Participate in conversations with IT department to provide clarity and technical expertise regarding the solution
- Recommend Database maintenance and Backup strategies.
- Work jointly to resolve technical issues

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Assumes responsibility

How to get an A+ in OnBase

- Provide first line of OnBase support for end users
- Understand your unique organization processes and how OnBase is used in all departments
- Look for changes within the organization and technical infrastructure that may affect the OnBase solution

How Customer Care can help

- Provide support to OnBase System Administrator
- Act as your advocate to Hyland and other vendors
- Maintain a high level working knowledge of organization processes

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Resourceful and independent		

Participates in group work

How to get an A+ in OnBase

- Schedule ahead when making changes that will require assistance
- Notify management of upcoming changes to system and how they will be affected
- Regularly update your team on the progress of issues, changes and enhancements to the system

How Customer Care can help

- Provide pre-scheduled off-hour support
- Act as backup support when the system administrator is unavailable
- Provide connection between you and the ImageSoft Professional Services team as needed

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Resourceful and independent	A+	<i>Always looking for new ways to improve and use OnBase</i>

Resourceful and independent

How to get an A+ in OnBase

- Leverage OnBase to help automate and improve efficiency of manual processes
- Identify other departments that would benefit from an OnBase solution
- Build awareness of how OnBase has helped and publicize it

How Customer Care can help

- Suggest changes to your system that will improve process efficiency
- Provide information on new modules or existing products that may enhance your solution
- Provide one on one advice and consulting regarding solution enhancements

HOMEWORK ASSIGNMENTS

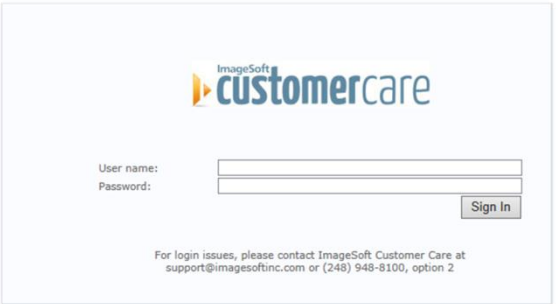
Homework Assignments

- Join the Hyland Community
 - www.hyland.com/community
- Visit the Hyland Training site
 - <http://training.onbase.com>
- Contact ImageSoft Customer Care
 - Hyland System Administration MRG
 - ImageSoft Troubleshooting Toolbox
 - ImageSoft System Admin Welcome Kit

CONTACTING CUSTOMER CARE

Contacting Customer Care

- We are available 8am-6pm, your time zone. (excluding US holidays)
 - Phone
 - (248) 948-8100, option 2
 - Email
 - support@imagesoftinc.com
 - ImageSoft Portal
 - <https://portal.imagesoftinc.com>



The screenshot shows the ImageSoft Customer Care login interface. At the top, the logo reads "ImageSoft customer care" with "ImageSoft" in blue and "customer care" in a larger, bold blue font. Below the logo, there are two input fields: "User name:" and "Password:". To the right of the password field is a "Sign In" button. At the bottom of the page, there is a small text block: "For login issues, please contact ImageSoft Customer Care at support@imagesoftinc.com or (248) 948-8100, option 2".

Thank You

Please remember to fill out your survey to receive two complimentary drink tickets for the post Summit afterglow.

