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**Overview | OnBase****Purpose**

OnBase is a document hosting platform that is closely integrated with **Lightico**. As an agent, it is of critical importance to be aware of OnBase's capabilities and the way in which you interact with the platform when processing service requests.

**Why we made it?**

OnBase works in conjunction with the functionality of **Lightico** to further streamline and improve the connect service process for both customers and agents.

**How will this benefit you?**

You will know how to access and navigate OnBase, shortening the time it takes to process a service request and, in turn, driving increased customer satisfaction.

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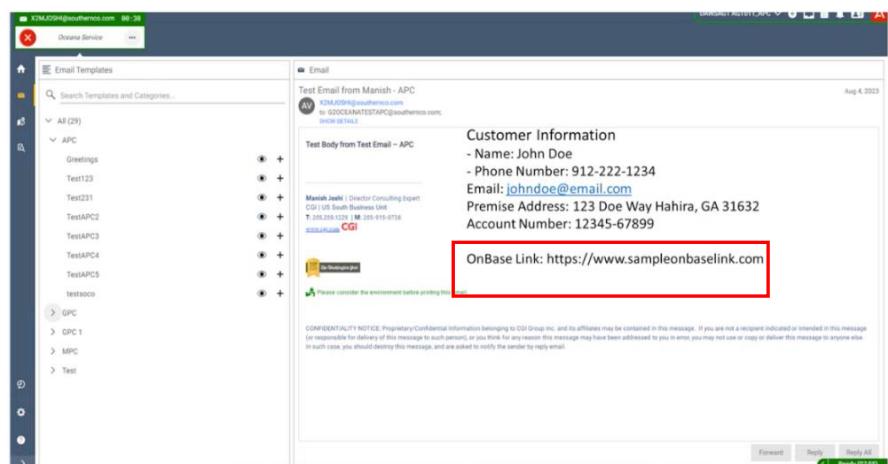
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Lesson A | Access OnBase

Purpose

To learn how to access **OnBase**.

1. Once a customer submits their documents through **Lightico**, you will receive a notification in **Workspaces**.
2. The notification will include the customer's information and a link to view the customer's documents in **OnBase**.
3. Click the **OnBase** link to open **OnBase**. 



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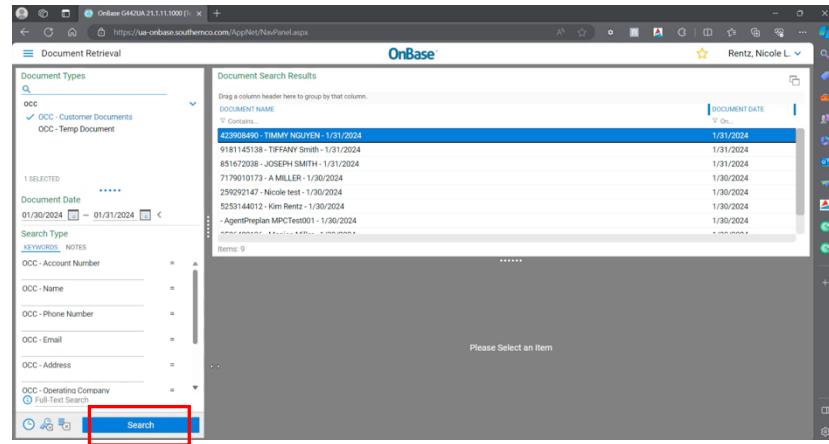
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Lesson B | Customer Search

Purpose

To learn how to search for a specific customer's documents within **OnBase**.

1. In **OnBase**, you can use the left-side panel to search for a specific customer. Search parameters can include Account Number, Customer Name, Customer Phone Number, Physical Address, and more.
2. Enter your desired search parameters and click the "Search" button.
3. **Lichtico** customer sessions matching your search parameters will appear in the "Document Search Results" panel in the center of the screen.
4. Select the appropriate customer session, and their documents will appear in the lower panel of the screen.



The screenshot shows the OnBase Document Retrieval interface. On the left, there is a sidebar with search filters for 'Document Types' (selected 'occ'), 'Document Date' (set to 01/30/2024), and 'Search Type' (set to 'Full-Text Search'). Below these are dropdowns for 'KEYWORD', 'NOTES', and various 'OCC -' fields. At the bottom of the sidebar is a red-bordered 'Search' button. The main right panel is titled 'Document Search Results' and lists several document entries. One entry is highlighted in blue: '42398490 - TIMMY NGUYEN - 1/31/2024'. Other entries include '9181145138 - TIFFANY Smith - 1/31/2024', '851612088 - JOSEPH SMITH - 1/31/2024', and '7179910173 - A MILLER - 1/30/2024'. The interface has a light gray background with blue and black text.

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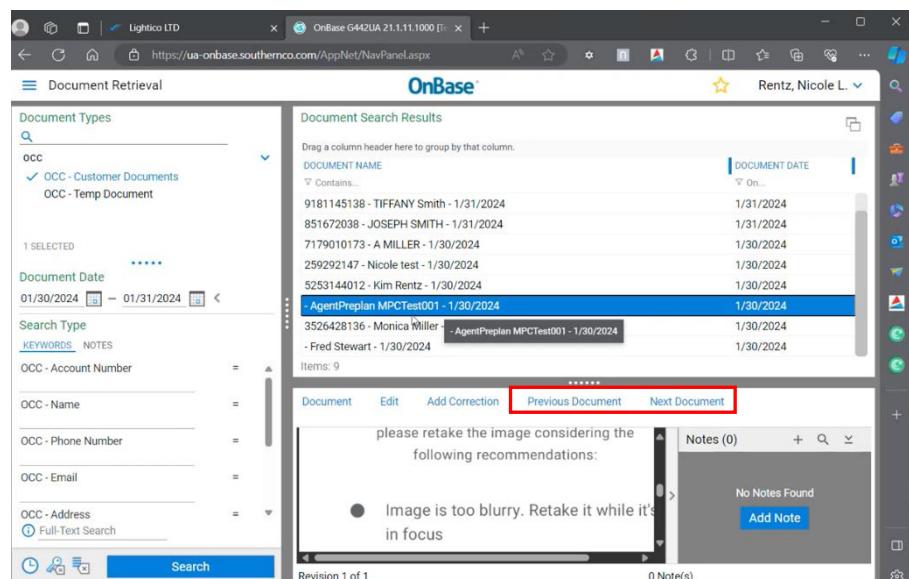
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Lesson C | View Documents

Purpose

To learn how to view documents within **OnBase**.

1. You can view the documents the customer has uploaded in the bottom panel of **OnBase**.
2. Click “Document” to view the first document.
 - a. You can cycle through documents by clicking the “Previous Document” and “Next Document” buttons.



The screenshot shows the OnBase interface with the following details:

- Document Retrieval Panel:** Shows search filters for "Document Types" (OCC - Customer Documents, OCC - Temp Document), "Document Date" (01/30/2024 to 01/31/2024), and "Search Type" (Keywords, Notes). The "OCC - Name" field contains "AgentPreplan MPCTest001".
- Document Search Results Panel:** Displays a list of documents with columns for "DOCUMENT NAME", "DOCUMENT DATE", and "On...". The results include:

DOCUMENT NAME	DOCUMENT DATE	On...
9181145138 - TIFFANY Smith - 1/31/2024	1/31/2024	
851672038 - JOSEPH SMITH - 1/31/2024	1/31/2024	
7179010173 - A MILLER - 1/30/2024	1/30/2024	
259292147 - Nicole test - 1/30/2024	1/30/2024	
5253144012 - Kim Rentz - 1/30/2024	1/30/2024	
AgentPreplan MPCTest001 - 1/30/2024	1/30/2024	
3526428136 - Monica Miller - AgentPreplan MPCTest001 - 1/30/2024	1/30/2024	
- Fred Stewart - 1/30/2024	1/30/2024	
- Document View Panel:** Shows a preview of the document "AgentPreplan MPCTest001 - 1/30/2024" with the message: "please retake the image considering the following recommendations: Image is too blurry. Retake it while it's in focus". It also shows "Notes (0)" and "No Notes Found".