Ohio EPA - eDoc Phase I

OnBase Citrix Setup

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Introduction

The purpose of this document is to provide a guide for the setup of a Citrix account in the Ohio EPA environment as of the Phase 1 launch (OnBase 13, Windows XP). These accounts will primarily be used by employees of Local Air Pollution Control Agencies ("LAAs") in order to upload and index documents into the OnBase solution. These steps may change depending on the specific operating system, and environment at each LAA. This document is current as of September 2013.

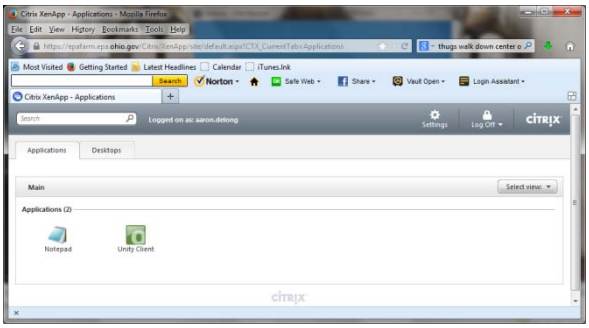
Prerequisite Conditions

In order to begin the setup process, a number of prerequisite conditions need to be met, including:

- An OAKS Account must be present for the user. (Note: Must for production, optional for test)
- The OAKS Account must be enabled in the Ohio EPA Citrix environment.
- An OnBase account must be available for the user, with access to the appropriate LAA scan queues.
- The LAA user must have access to the folder *on the LAA network* where their scanned documents are stored.

Part 1: Install Citrix Receiver Software

1. In a browser, enter the URL: https://epafarm.epa.ohio.gov
2. Follow on screen instructions for installation
3. Close and restart computer
4. Return to URL: https://epafarm.epa.ohio.gov
5. Login with the Ohio EPA provided Citrix userid and password. (Note: The user id is likely to be FIRSTNAME.LASTNAME, initial password may be P@ssw0rd, with a zero instead of an "o".
6. Change the initial password. (You will be forced to do this on your first login)
7. Verify that the window contains two tabs, *Applications* and *Desktops*.



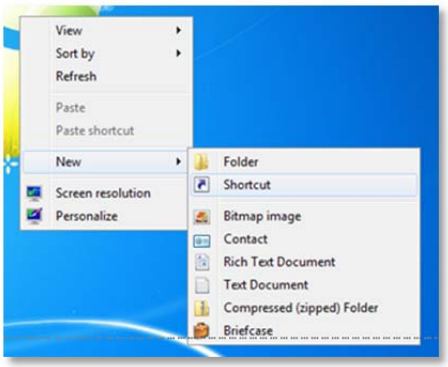
Part 2: Setup Desktop Folders

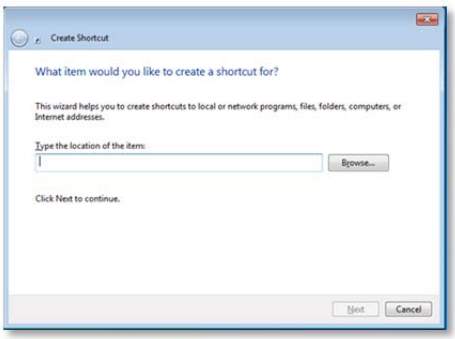
1. Click on the Desktops tab, and then click on the *Desktop* icon. Note: If prompted by Windows security, choose *Permit All Access.*

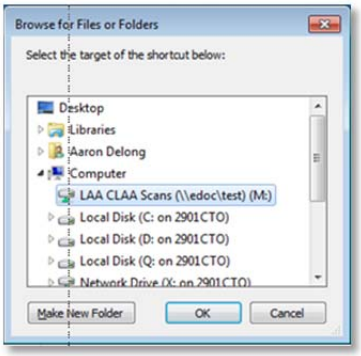
2. At this point, a Windows-like desktop should appear, with a *Start* menu bar at the bottom of the screen and a recycle-bin icon at the top-left.

3. Create a desktop shortcut to the OnBase Scan Folder for your LAA (the location where OnBase picks up image files to process) by right-clicking the desktop and choosing *Create New* from the mini-menu. From there, click Browse and expand the Computer menu option and choose the network drive that begins with LAA, and contains your department acronym. Click *OK* to close the file browser and click *Next* to continue

   Note: If you do not see this folder, contact your local technical support representative.
   Another Note: You may again be prompted by Windows security. If so, choose Permit All Access.







4. Create a desktop shortcut to your local scanner (the network location where your office scanner saves image files of documents you have scanned) by right-clicking the desktop and choosing *Create New* from the mini-menu. From there, either browse for the folder or enter the location as provided by your local technical support. Click *Next* to complete shortcut creation.

   The steps just completed should leave you with a Citrix desktop looking something like this:

You are now ready to move documents into the eDoc system!

Part 3: Moving Documents into eDocs

1. Scan documents into your scanner, using your normal procedures. The documents can be scanned either one document at a time or as a batch of documents with separator sheets in between (sheets will be provided separately).

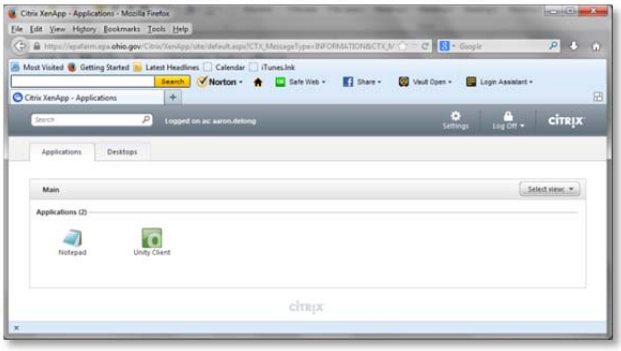
2. Enter the Ohio EPA Citrix environment by entering the URL: https://epafarm.epa.ohio.gov with your userid and password.

3. Click the *Desktops* tab and click the *Desktop* icon to open your Citrix desktop.

4. On the desktop, expand the shortcut pointing to your local scanner.

5. Drag files for to your scans from your local scanner shortcut to the OnBase Scan Folder shortcut.

6. Enter OnBase by clicking the *Applications* tab and then clicking the Unity Client icon.



7. Login to OnBase with your credentials and index documents per your previous training.