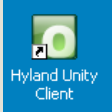


# OnBase Demo

ONBASE WORD	DEFINITION	EXAMPLE
Document Type	The name of the document which is typically prefixed by your office acronym	CGPS Resume CGPS Application - Program
Keyword	Searchable field	Last Name, First Name, ID
Document Type Groups	A Document Type is associated to one Document Type Group	Payroll, Purchasing, Registrar, Financial Aid, Graduate Studies
Indexing	Assigning keywords to a document type	CGPS Application – Program: George, Washington, 1234
Batch Import	Rather than storing documents one at a time, import several	
Sweep	Scanning to a network file store and then importing the documents into OnBase to be indexed.	
Unity	Software used to access OnBase documents	

# Security

- SSL encryption
- Email Link vs. Attachment
- Timeout
- Document Type Security
- Keyword Security

# High Availability

- Two copies of each document
- Database will be mirrored by early Spring

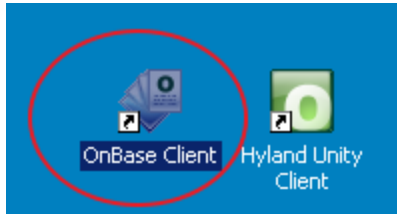
# Accessibility

- OnBase Unity Client
- iPad App
- Web
- Outlook 2010

# How do we get files in?

- Batch Mode
- Ad Hoc Import (one at a time)
- Print to OnBase
- Outlook 2010

# How do we get files in?



## Batch Mode

OnBase Client (onbase12) Test System - Not For Production Use

File Document User Processing Workflow Window Help

Draw Permanent Redaction

### Document Imaging

Scan Queues:

Filter:

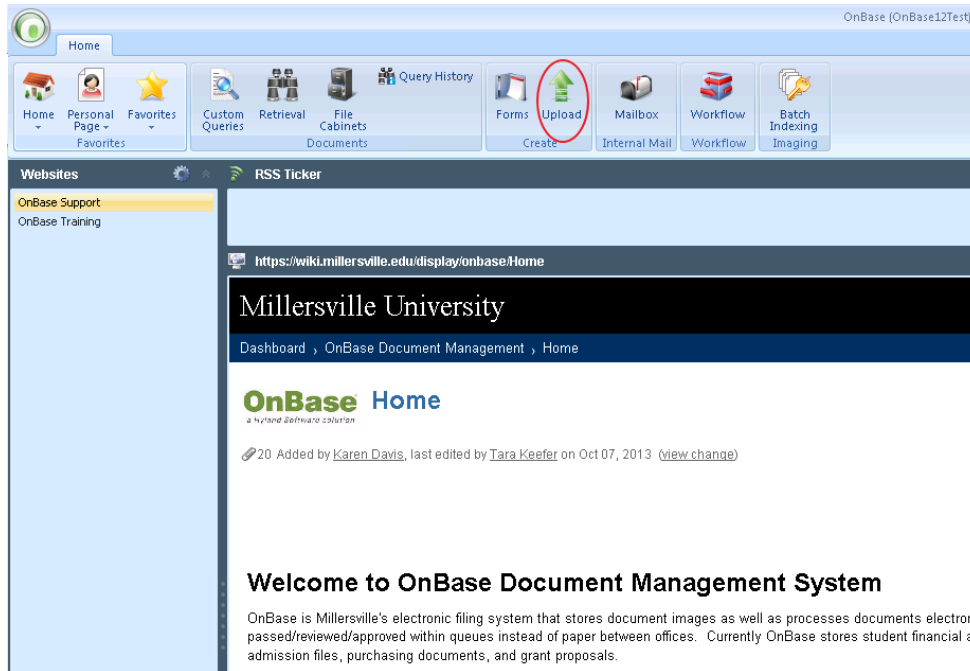
Scan Queue	Scan Format	Scanner Type
CGPS Student Admission	No Format Specified	Unavailable
CGPS Student Record	No Format Specified	Unavailable
CGPS Transcripts	No Format Specified	Unavailable

Scan Queues:

- Scan Queues:
- Awaiting Index (0)
- Index in Progress (1)
- Awaiting Commit (0)
- Committed
- Scheduled Processes

# How do we get files in?

## Ad Hoc Import



OnBase (OnBase12Test)

Home

Home Personal Page Favorites Custom Queries Retrieval File Cabinets Query History Forms Upload Mailbox Workflow Batch Indexing Imaging Create Internal Mail Workflow

Websites

OnBase Support OnBase Training

RSS Ticker

https://wiki.millersville.edu/display/onbase/Home

Millersville University

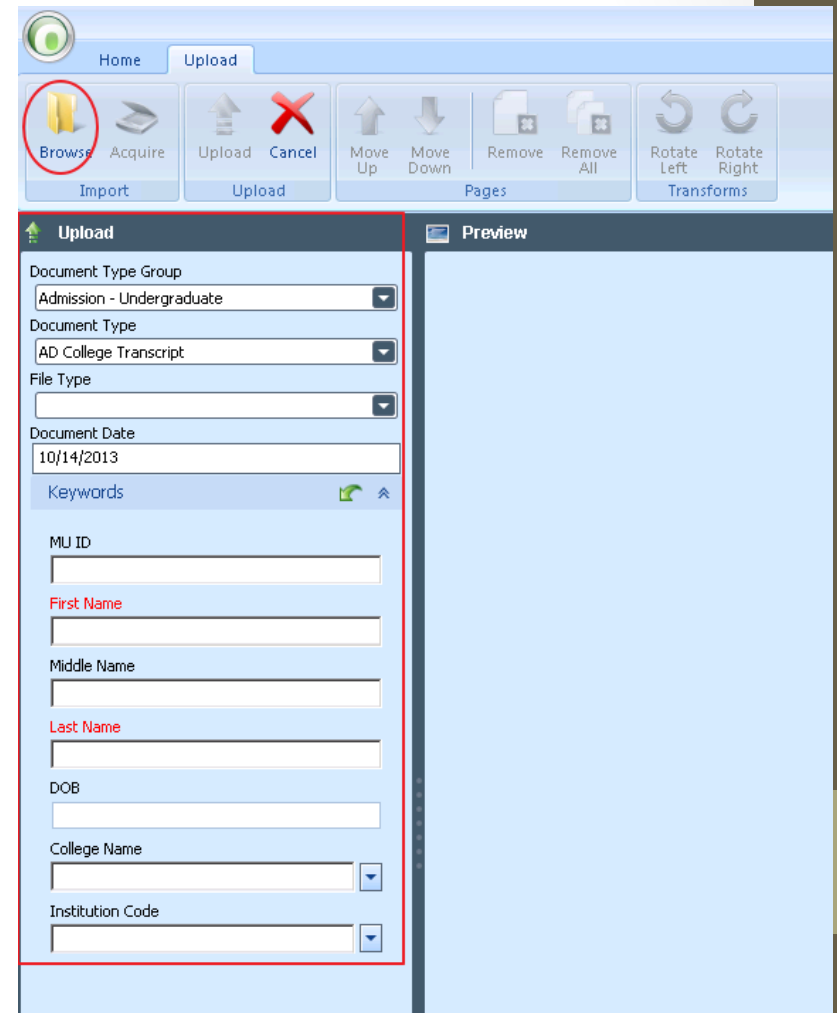
Dashboard OnBase Document Management Home

**OnBase Home**  
A Hybrid Enterprise solution

20 Added by Karen Davis, last edited by Tara Keefer on Oct 07, 2013 (view change)

**Welcome to OnBase Document Management System**

OnBase is Millersville's electronic filing system that stores document images as well as processes documents electronic passed/reviewed/approved within queues instead of paper between offices. Currently OnBase stores student financial aid admission files, purchasing documents, and grant proposals.



Home Upload

Browse Acquire Upload Cancel Move Up Move Down Remove Remove All Rotate Left Rotate Right

Import Upload Pages Transforms

**Upload**

Document Type Group  
Admission - Undergraduate

Document Type  
AD College Transcript

File Type

Document Date  
10/14/2013

Keywords

MU ID

First Name

Middle Name

Last Name

DOB

College Name

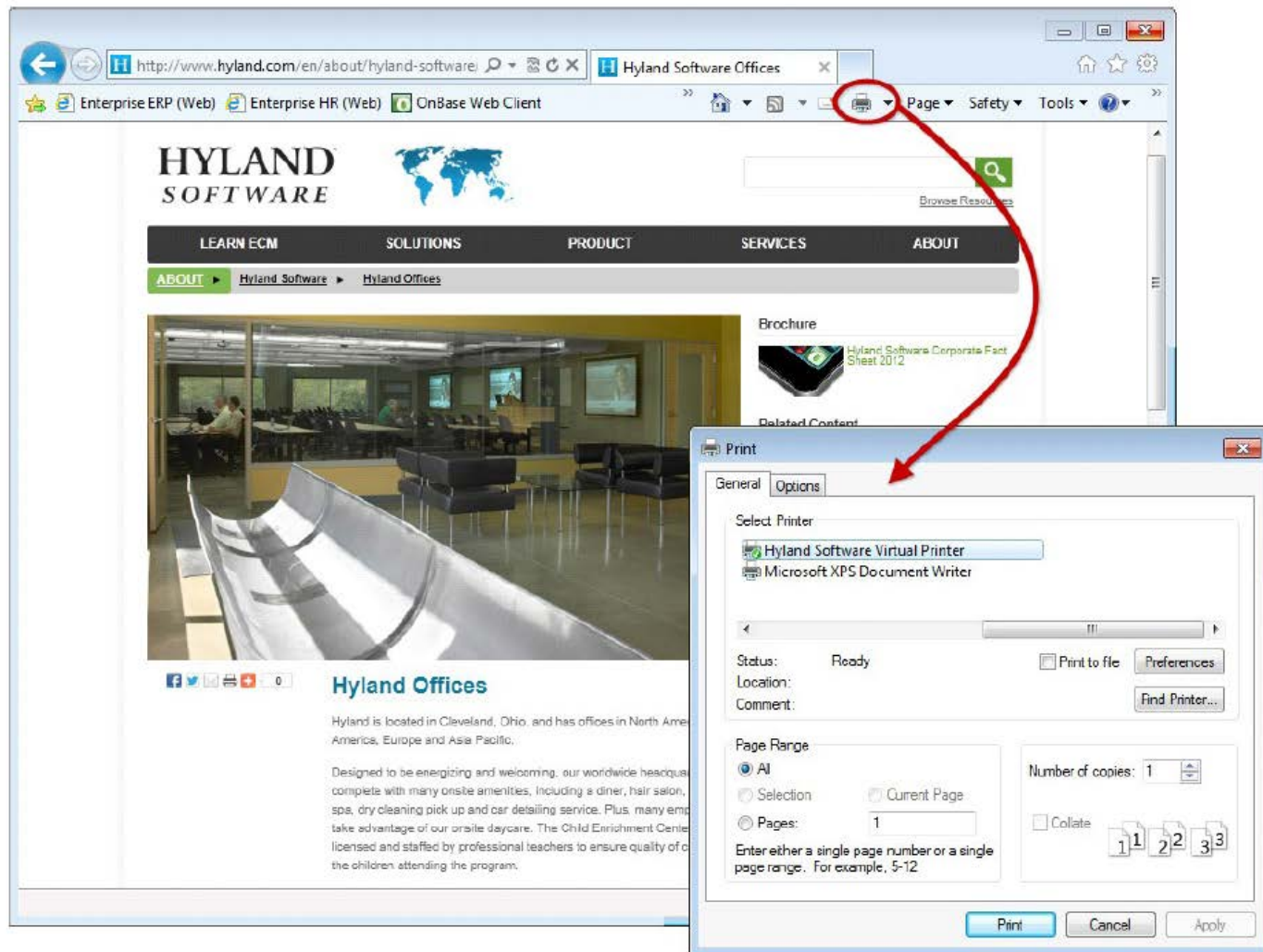
Institution Code

**Preview**



# How do we get files in?

## Print to OnBase



# How do we get files in?

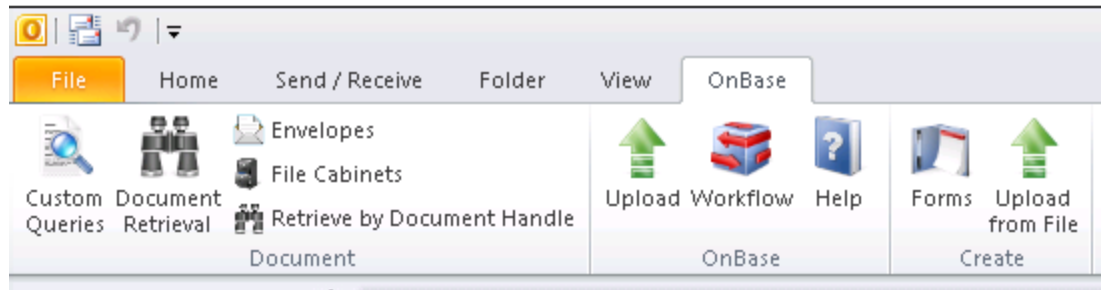
## Print to OnBase

The screenshot displays the OnBase 'Perform Upload' application window. The title bar reads 'Perform Upload'. The interface is divided into several sections:

- Toolbar:** Located at the top, it contains buttons for 'Import' (Browse, Acquire), 'Upload' (Upload, Cancel), 'Pages' (Move Up, Move Down, Remove, Remove All), and 'Transforms' (Rotate Left, Rotate Right).
- Metadata Sidebar (Left):** Contains fields for document classification and information:
  - Document Type Group: Human Resources
  - Document Type: HR - Supporting Documentation
  - File Type: Image File Format
  - Document Date: 4/29/2013
  - Keywords: (empty)
  - Employee ID: (empty)
  - Applicant ID: (empty)
  - Department: (empty)
  - Job Title: (empty)
  - Manager: (empty)
  - Name: (empty)
- Main Preview Area:** Shows a document titled 'C:\OnBase Printer Spool\9SecondFoods\F9F266BBF3B6324CACA39DE1E6EEBCBA.tif'. The document content is a webpage for 'Hyland Software Offices'. The page includes a navigation menu (HOME, SOLUTIONS, PRODUCT, SERVICES, ABOUT), a main image of a modern office interior, and text describing the company's global presence and services. A sidebar on the right of the document shows 'PAGE 1' and 'PAGE 2' thumbnails.
- Options and Action Buttons (Bottom Left):** Includes an 'Options' dropdown and 'Upload' and 'Cancel' buttons.

# How to we get our files in?

## Outlook 2010

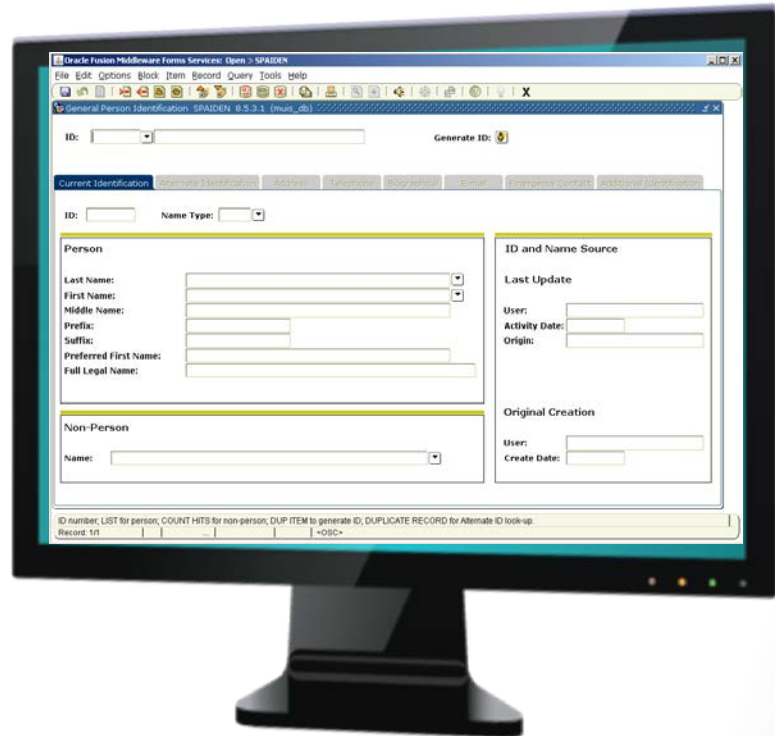


# How do we get files out?

- Banner Integration
- Custom Query
- Retrieval
- Outlook 2010
- Folders

# How do we get files out?

## Banner Integration



# How do we get files out?

## Custom Query

The screenshot displays the OnBase web interface. At the top, a navigation bar includes a 'Home' button and a 'Custom Queries' icon circled in red. Below this, a 'Websites' sidebar lists 'OnBase Support' and 'OnBase Training'. The main content area shows a 'Custom Queries' panel with a list of queries: 'CGPS All Documents', 'CGPS Applications - Program', 'College Transcripts', and 'Student File', with 'Student File' highlighted in yellow. To the right, the 'Student File' query configuration page is visible, featuring a description: 'Returns all application documents that will be reviewed by Program Coordinator and Committee Members.' Below the description are 'Date Options' with 'From' and 'To' input fields, and three text input fields for 'MU ID', 'First Name', and 'Last Name'.

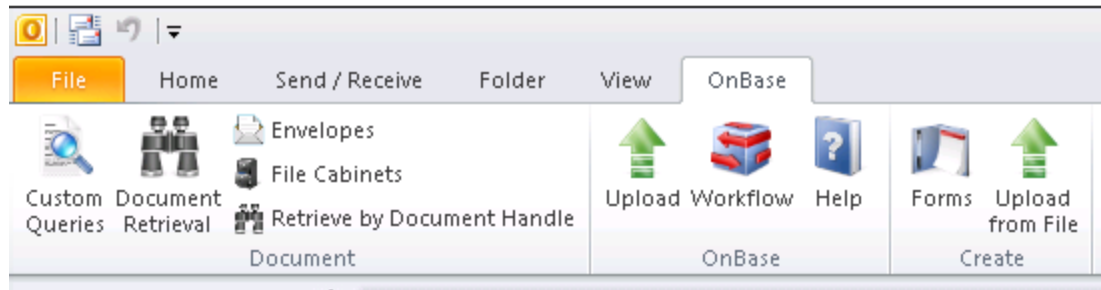
# How do we get files out?

Retrieval

The screenshot displays the OnBase software interface. At the top, a navigation bar includes icons for Home, Personal Page, Favorites, Custom Queries, Retrieval (circled in red), File Cabinets, Query History, Forms, Upload, Mailbox, Workflow, and Batch Indexing/Imaging. Below this, a 'Websites' sidebar lists 'OnBase Support' and 'OnBase Training'. The main content area shows a 'Document Retrieval' window with a search dropdown set to '<All>'. A list of document types is displayed, including 'Admission - Undergraduate', 'Graduate Student Admission', 'Graduate Student Record', 'Registrar', 'Student Identification', 'CERT Clearance - Attestment', 'CERT Course Requirement Worksheet', 'CERT Evaluation - Coop', 'CERT Evaluation - Early Field', and 'CERT Evaluation - PDE 430'. Below the list, there are input fields for 'Keywords and Date Range' with 'From' and 'To' boxes and a calendar icon.

# How to we get files out?

## Outlook 2010





# How to we get files out?

## Folders

The screenshot displays the OnBase software interface. The top navigation bar includes tabs for Home, Briefcase, Folder, Document, and Unity Form. Below this is a toolbar with various icons for actions like Find, Filter, Template, Keywords, History, Properties, Notes, New Note, Delete Note, Go To Bookmark, Post Event, Place Hold, View Holds, and Remove Hold.

The main interface is divided into several sections:

- Folder Tree:** A hierarchical view of folders. The selected folder is "ANDREW LINCOLN (ID: 102)", which contains sub-folders for "Applicant Information", "Employment Documents", and "Performance Reviews".
- Document Viewer:** Displays the "Interview Guide for ANDREW LINCOLN (Applicant #1968)". The document content includes:
  - Candidate Information:** A form with fields for Name (ANDREW LINCOLN), Street Address (1234 CLEMENS ROAD), Email Address (ANDREW.LINCOLN@MA), City (WESTLAKE), Phone Number ((216)888-0999), State (OH), Position Applied For (SECURITY GUARD), and Zip Code (44145).
  - Interview Comments:** A section with three comment boxes:
    - HR Comments:** Background check showed a clear record except for one traffic violation. We were able to contact all of Andrew's
    - Skill Testing Comments:** Andrew passed all the Skill Testing related to our open security position and is now approved for a manager
    - Manager Comments:** After interviewing Andrew he left me with a very good impression. He illustrated a strong desire to befriend,
- Selected 1 of 6 Document(s):** A table listing documents related to the selected folder.

Icon	Document Type	Document Date	Name
[Icon]	HR - Interview Guide (E-Form)	5/23/2011	ANDREW LI
[Icon]	HR - Video Resume	1/15/2010	ANDREW LI
[Icon]	HR - Offer Letter	3/2/2007	ANDREW LI
[Icon]	HR - Resume	2/10/2007	ANDREW LI
[Icon]	HR - Cover Letter	2/10/2007	ANDREW LI
[Icon]	HR - Application For Employment (E-Form)	2/8/2007	ANDREW LI

At the bottom of the interface, there are sections for "Related Folders" and "Child Folders". A "Submit" button is visible at the bottom of the document viewer.

# Cost Estimate

## Importing Batches

Method	Description	Benefits	Scanner	OnBase License (one time cost)	Maintenance (covered by IT)
Individual Scanner (Fujitsu)	Scan into OnBase using a desktop scanner.	-Barcodes can be used to automatically fill keyword values	\$1,100	\$2,000	\$400/year
Network Scanner (Ricoh)	Scan files from Ricoh to a network drive. Then use OnBase to sweep/import files into OnBase	- Least Expensive - Need to know how to configure Ricoh to scan as image and 2 sided	\$0	\$500	\$100/year

# OnBase Wiki Space

<https://wiki.millersville.edu/display/onbase/Home>

# Project Timeline

Phase	Description	Approximate Duration
Discovery	Determine document types, keywords, custom queries, users.	2-4 hours
Deliverable: Document Taxonomy	IT creates a report of all the documents, keywords, users, custom queries	1-2 weeks
Validation	Office validates Document Taxonomy	1-2 weeks
Configure	IT configures the OnBase Test system	1-2 weeks
Functional Testing	Office logs into Test system and verifies accuracy and submits last minute changes.	1-2 weeks
Training	IT provides training to end users	1 hour
Go Live	Office begins using OnBase in production	