OnBase Document Management System
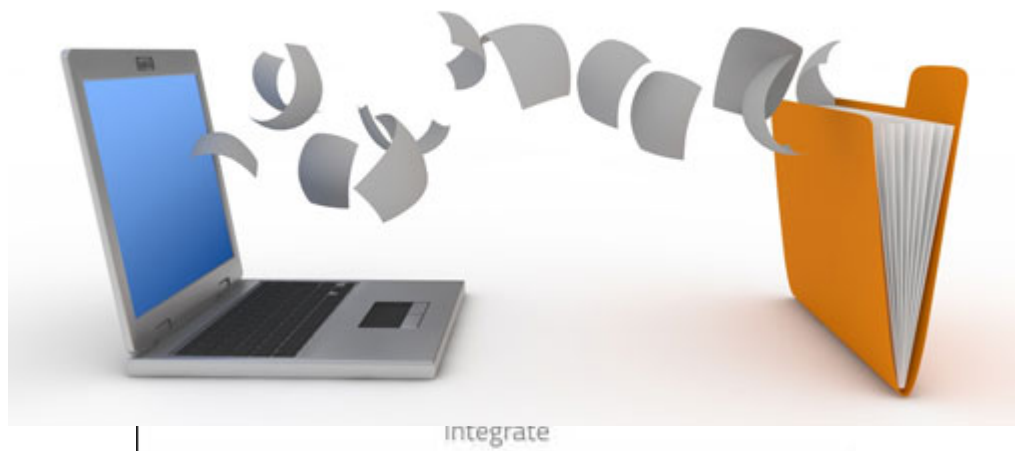# Single Enterprise Information Platform

OnBase Training Resources

- OnBase Support Page

- Free on-demand OnBase training

  OnBase Unity Client

  Incorporation Signatures in OnBase

How are we utilizing OnBase at Millersville University?

- 4 year anniversary in May

- 1.8 million documents (220 GB) Grew 33% from last year.

- 2 Academic Departments (Psychology, Nursing)

- 15 Administrative Offices (Admissions, FinAid, Graduate Studies, Registrar, Purchasing, Accounting,Bursar,Payroll,Advancment,ELCM...)

- 5 Online Forms (Graduate Studies, FinAid, Grant).

- 11 Approval Processes (Grants, Online Programs, Graduate Admissions (2), Financial Aid (3) , Bursar, Registrar, Payroll)

- 219 users accessed Onbase within the past 6 months

High Availability

- Two copies of each document

- Midday **and** Nightly backups. Nightly **offsite** backups.

- **Retention Recommendation**: Information Technology recommends that you **do not immediately destroy your documents**. Your office must retain the documents for a minimum of two weeks.
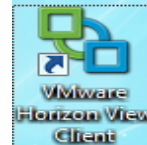 This will provide Information Technology time to secure an off-site backup of your documents. It is important that you verify with your attorneys and auditors for guidelines of destroying paper documents. Some paper documents might require a longer retention than the two week minimum.

Security

- **Secure Transmission**: Documents are encrypted during transmission

- **Sharing Documents**: Emailing documents as a <u>link </u>requires recipient to log into OnBase. <u>Attachments </u>can be password protected.

- **Timeout Period:** 1 hour

- **Document Type Security**: The department/office can decide if their documents are accessible to anyone else.

- **Keyword Security**: Only chairperson can see "Leave of Absence" documents from students that are in their department's program.

- **Redaction**: Hide confidential data on documents

Accessibility

- OnBase Unity Client
- iPad App
- Outlook 2010 and Outlook 2013
- Banner INB
- Internet Explorer
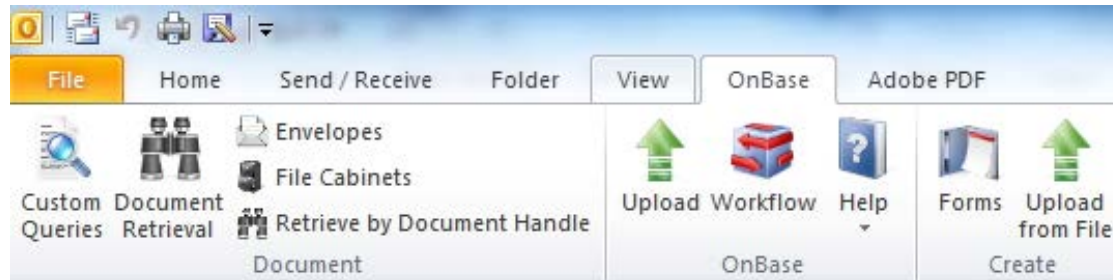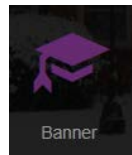
Retrieval

Double Click on the document image to retrieve related documents

Retrieval

Custom Query

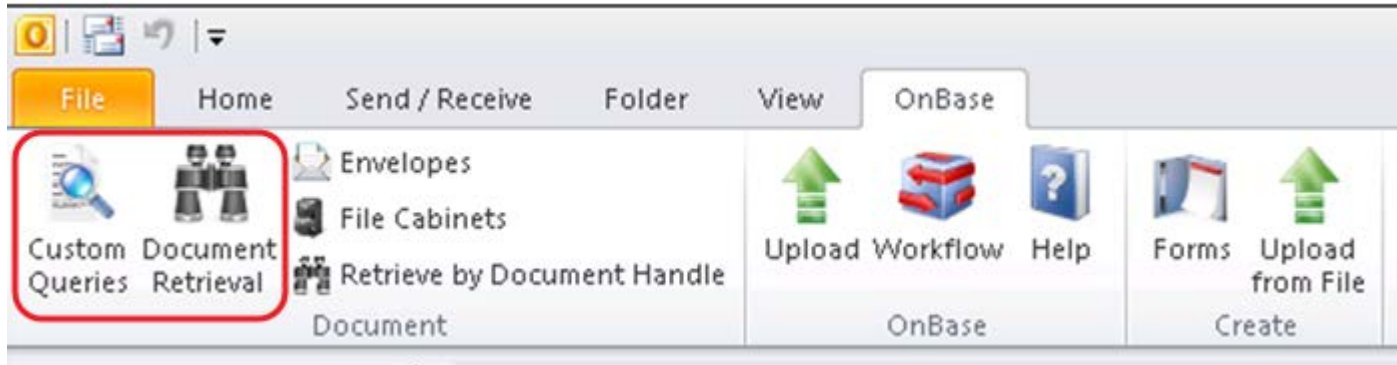**You can attach a note to a document**

Retrieval

Outlook 2010
Outlook 2013

Retrieval

OnBase   Banner
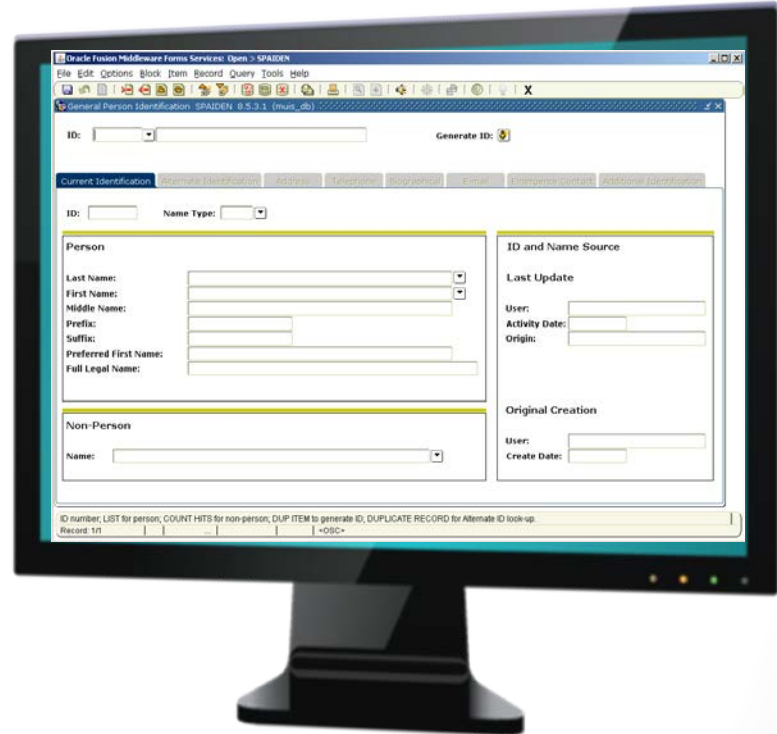
Banner Integration (SPAIDEN)

Import

Singe File Import

Under User Options/Document Upload check the following:
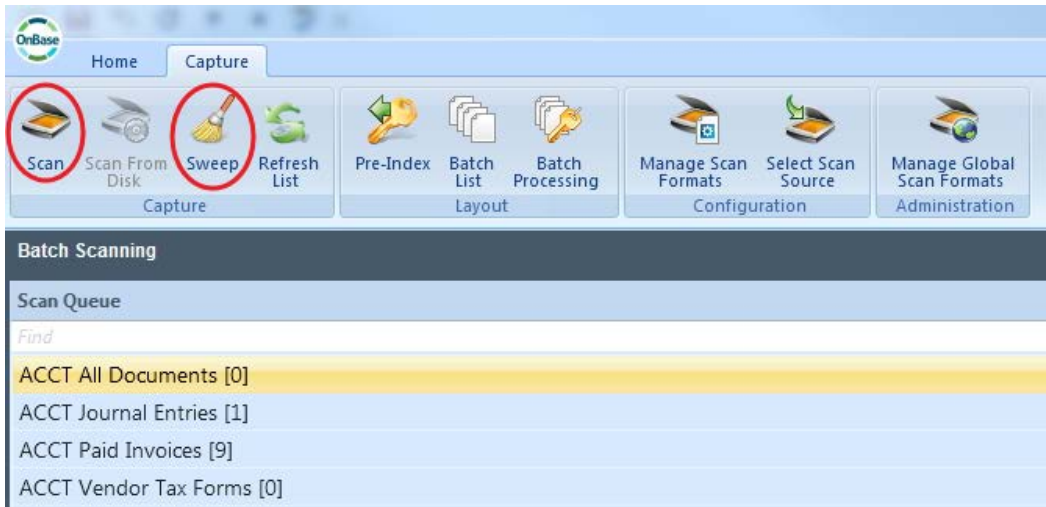
Import

Batch Processing

(Import multiple files)

STEP 1: Import (Scan/Sweep)

STEP 2: Index

Import

"Print" to OnBase

Import

Outlook 2010
Outlook 2013
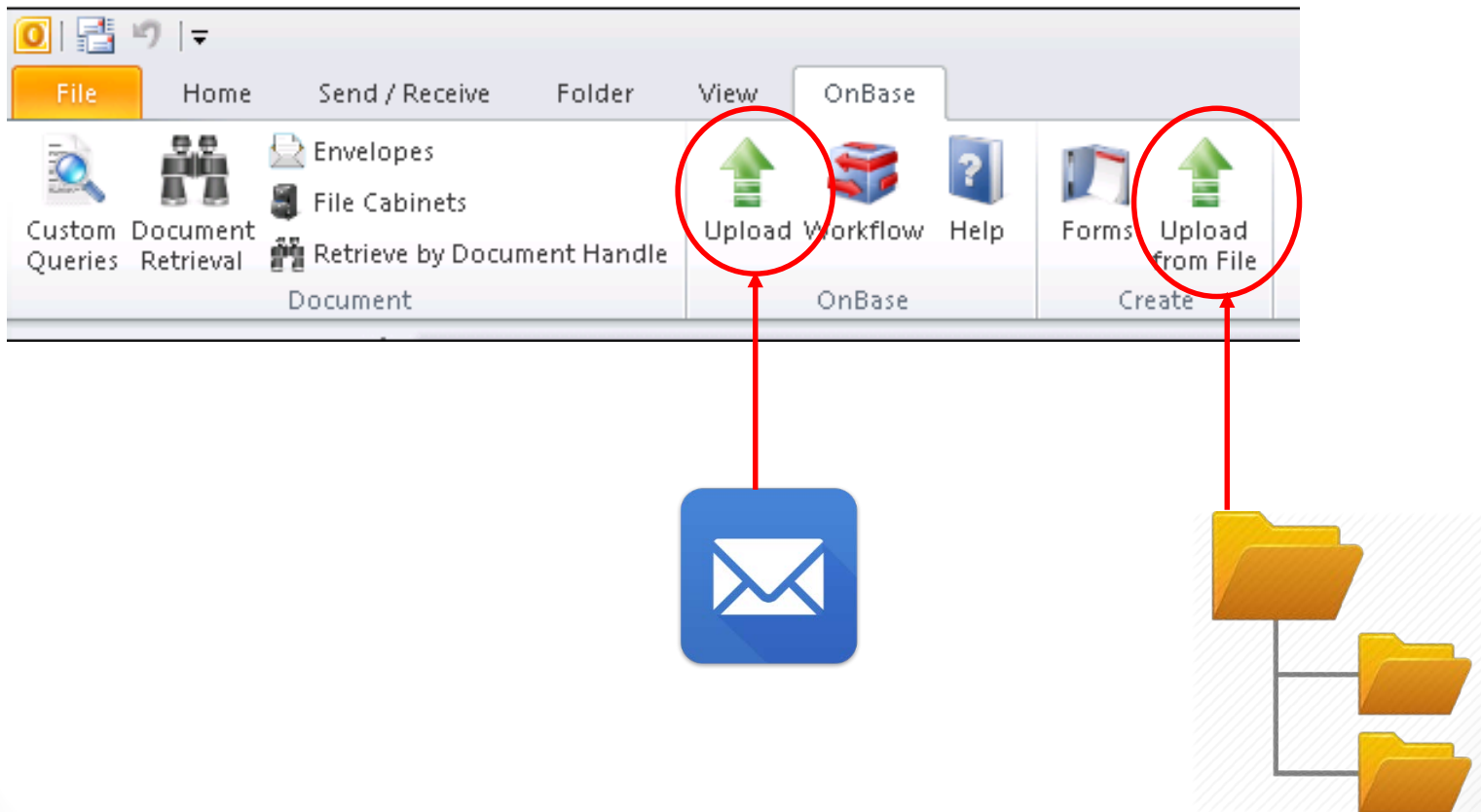
Manipulating Documents

- **Markup Toolbar**: highlight, strikeout, add text, draw shapes

- **Excel/Word**: edit document in OnBase and save history of changes

- **Redaction**: hide confidential data

- **Splitting Documents**: separate documents into one or more documents

- **Adding Pages to Documents**: scan or upload additional pages into an existing document

- **Reorder Pages of a Document**: rearrange pages, rotate images

- **Notes:** Attach notes to documents.

Electronic Signature

- Type your name and date on the form

  Mary Jones 4/4/2016

- Apply an image of your signature to the document

- Sign document using the mouse

- Signature Pad

Approval Processes

Currently in OnBas[e]
- Payroll – Approval Fa[...]
- Online Programs Adm[...]
- Graduate Admission[...]
- Grant Proposals
- Emergency Loans (Fi[...]
- FAFSA Verification (E[...]
- Summer Aid App
- Authorization to Rele[...]

Fall 2016
- Exception for Gradua[...]
- Cooperating Teacher[...]
- Change of Enrollme[...]

Wish List
- Post Bacc Admission[...]
- Change to Master Sc[...]
- Facilities Key Reques[...]
- Housing Room Chang[...]
- Promotion and Tenu[...]
- Curriculum Workflow[...]
- Summer Contracts
- Travel Forms
- Return of Collections[...]
- Internship Registration (ELCM)

"We started using OnBase to archive our faculty, staff, and student payroll records. The benefits are numerous such as no more sifting through paper records that are archived in a basement in another building, having to shred after the number of years specified by the government retention laws, and every employee with access can search for the record from the comfort of their office. You can have automatic indexing so the files can be uploaded directly from your computer to OnBase and indexed automatically into the storage files to fire? Uses for that document type that also provides electronic signature. You can upload the document directly from your computer and have OnBase automatically send the document to the correct person for signature. No more wondering where in the signature process the document is or having each department make a copy along the way. All departments that sign the document can pull up the copy stored in OnBase rather than making a paper copy and filing manually. It is awesome." – **Jeanne Pflugrad, Director of Payroll (Human Resources)**

Chris Steuer, Sustainability Manger *"The benefits of electronic document management are many.*

- *Greater ability to query your records based on keywords and keyword pairings;*
- *Meeting student expectations regarding the modernity of our systems,*
- *Faster signatures, better tracking and a digital record that can be saved in multiple locations.*

On average is takes 6 minutes to file and retrieve a paper document.