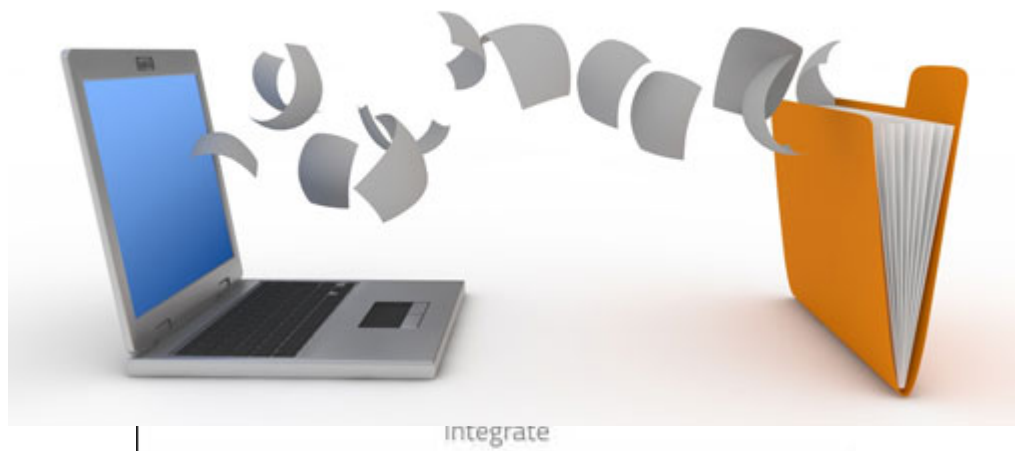




OnBase Document Management System

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, Advancement, 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.

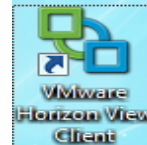
This will provide Information Technology time to secure an off-site backup of your documents. It is important that you verify with your attorneys and auditors for guidelines of destroying paper documents. Some paper documents might require a longer retention than the two week minimum.

Security

- **Secure Transmission:** Documents are encrypted during transmission
- **Sharing Documents:** Emailing documents as a [link](#) requires recipient to log into OnBase. [Attachments](#) 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

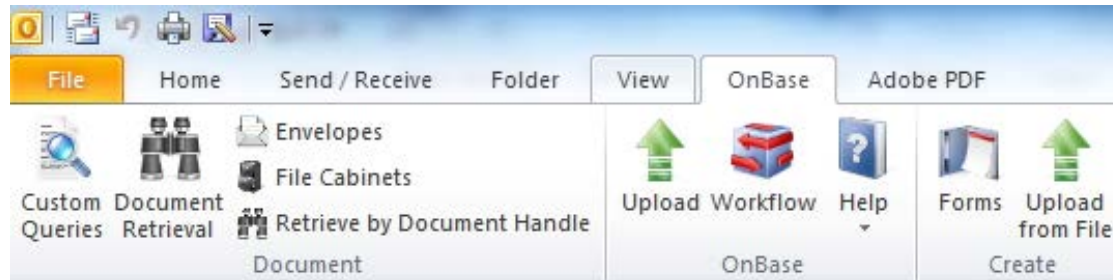
- OnBase Unity Client



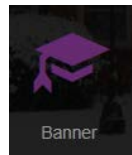
- iPad App



- Outlook 2010 and Outlook 2013



- Banner INB



- Internet Explorer



Retrieval

The screenshot shows the OnBase Document Manager interface. In the top navigation bar, the 'Retrieval' icon is circled in red. Below it, the 'Document Retrieval' dialog box is open, showing a list of document types and groups. The list includes:

- <All>
- 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
- CERT Evaluation - PDE 430

The dialog box also has a 'Keywords and Date Range' section with 'From' and 'To' input fields.

Quick Tip

Double Click on the document image to retrieve related documents

Retrieval

Custom Query

The screenshot displays the OnBase web interface. At the top, a navigation bar includes icons for Home, Personal Page, Favorites, Custom Queries (circled in red), Retrieval, File Cabinets, Forms, Upload, Mailbox, Workflow, and Batch Indexing. 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' (highlighted in yellow). To the right, the 'Student File' query details are shown, including 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'.

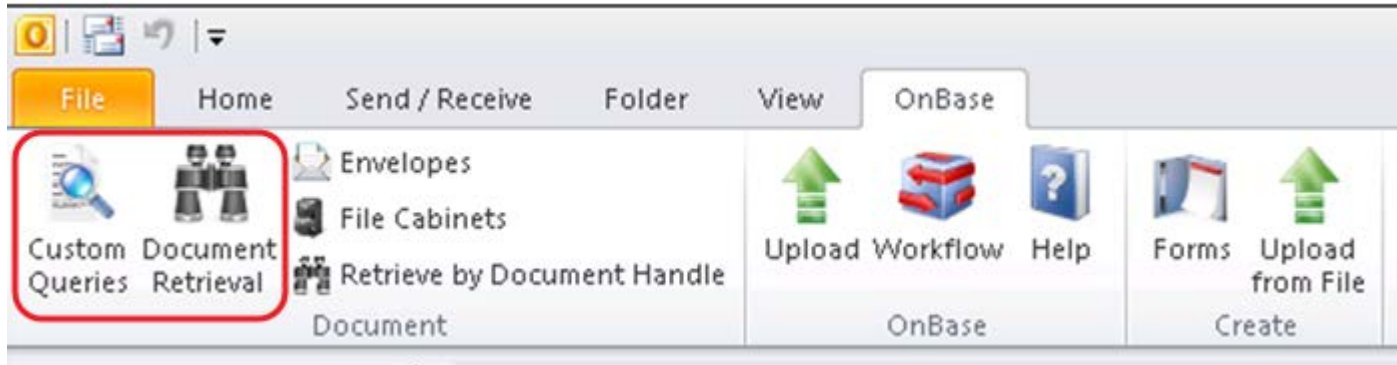


**You can attach
a note to a
document**

Retrieval

Outlook 2010

Outlook 2013

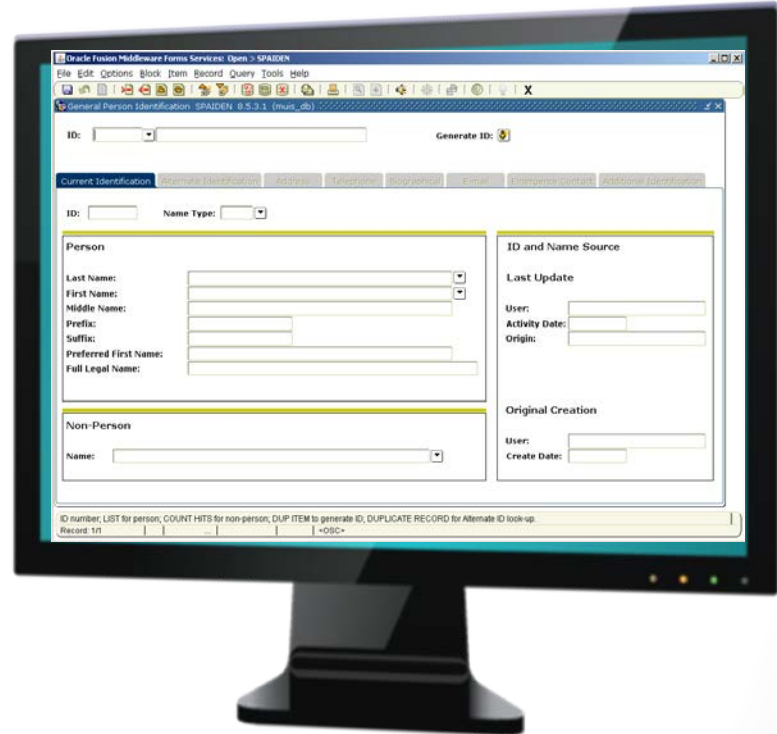


Retrieval

OnBase



Banner



Banner Integration (SPAIDEN)

Import

OnBase (OnBase12Test)

Home

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

Websites

OnBase Support OnBase Training

RSS Ticker

https://wiki.millersville.edu/display/onbaseHome

Millersville University

Dashboard OnBase Document Management Home

OnBase Home
a myland software 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.

Singe File Import

Home Upload

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

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

Document Upload

- Clear Document Keywords After Import
- Open Document After Upload
- Delete Files After Upload
- Expand Options Panel By Default

Preview

- Enable Automatic Preview of Imported Files



Under User Options/Document Upload check the following:

User Options

General WorkView Document Document Upload Imaging Printing Retrieval Date Options Revision Control Service Mode Signatures Workflow

Document Upload

- Clear Document Keywords After Import
- Open Document After Upload
- Delete Files After Upload
- Expand Options Panel By Default

Preview

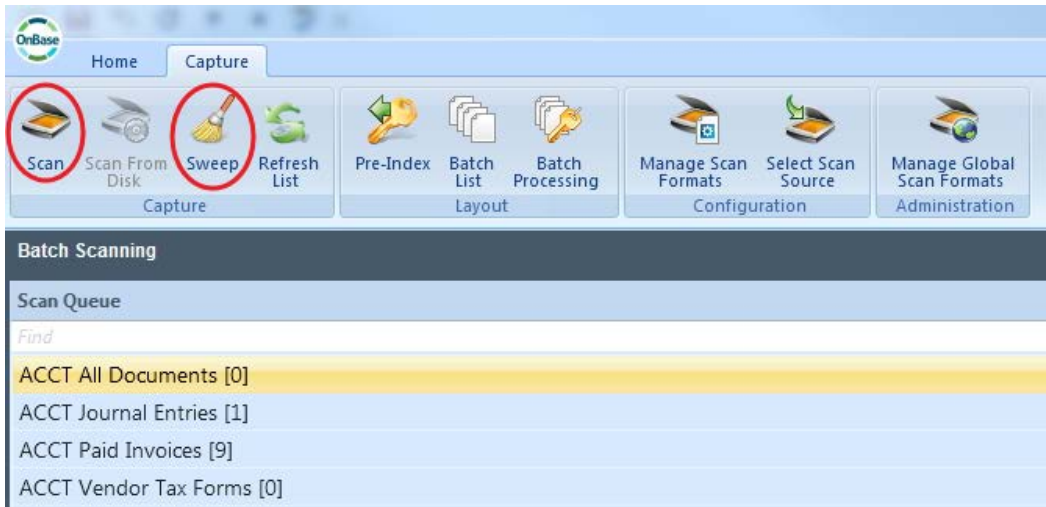
- Enable Automatic Preview of Imported Files

Save Cancel

Import

Batch Processing (Import multiple files)

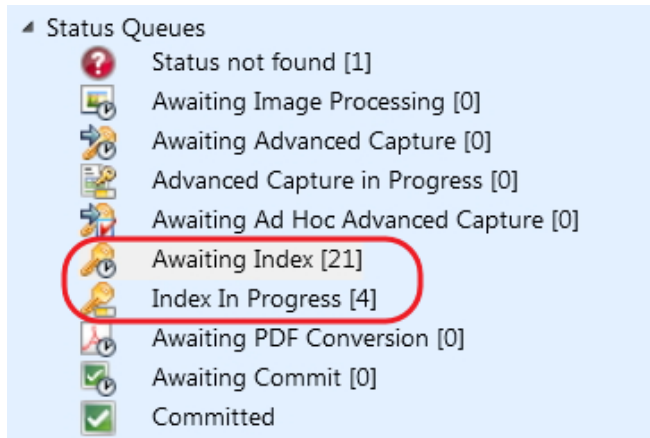
STEP 1: Import (Scan/Sweep)



The screenshot shows the OnBase software interface. The 'Capture' tab is active, and the 'Scan' and 'Sweep' buttons are circled in red. Below the navigation bar, there are several sections: 'Batch Scanning', 'Scan Queue', and a list of scan jobs. The 'Scan Queue' section is highlighted in yellow and contains the following items:

- ACCT All Documents [0]
- ACCT Journal Entries [1]
- ACCT Paid Invoices [9]
- ACCT Vendor Tax Forms [0]

STEP 2: Index



The screenshot shows the 'Status Queues' section of the OnBase software interface. The 'Awaiting Index [21]' and 'Index In Progress [4]' items are circled in red. The list of status queues is as follows:

- Status not found [1]
- Awaiting Image Processing [0]
- Awaiting Advanced Capture [0]
- Advanced Capture in Progress [0]
- Awaiting Ad Hoc Advanced Capture [0]
- Awaiting Index [21]
- Index In Progress [4]
- Awaiting PDF Conversion [0]
- Awaiting Commit [0]
- Committed

Import

“Print” to OnBase

Print

Printer: OnBase (Electronic Archive) Properties Advanced Help ?

Copies: 1 Print in grayscale (black and white) Save ink/toner ⓘ

Pages to Print

All Current page Pages 1 - 3 [More Options](#)

Page Sizing & Handling ⓘ

Size Poster Multiple Booklet

Fit Actual size Shrink oversized pages Custom Scale: 100 % Choose paper source by PDF page size

Comments & Forms

Document and Markups

Summarize Comments

Scale: 100%

8.5 x 11 Inches

OnBase Perform Upload

Upload

Import Upload Pages Transforms

Upload

C:\OnBase Printer Spool\E4863D1E341C3D4FABA26B82E4F530C6.tif

Document Type Group: Accounting

Document Type: ACCT Coop Teacher (Temporary)

File Type: Image File Format

Document Date: 04/18/2016

Keywords

SSN

Last 4 Digits of SSN

SAP Vendor ID

SAP Vendor Name

Options

Open Document After Upload Delete Files After Upload Hide Scanner Settings

Upload Cancel

INSTRUCTIONS FOR COMPLETING AND SUBMITTING
THE COOPERATING TEACHER AGREEMENT AND PAYROLL FORM
AND
THE W-9 FORM

NOTE: Both the Cooperating Teacher Agreement and Payroll Form AND The W-9 Form are now REQUIRED EACH TIME you sponsor a student teacher. The W-9 form is found on the reverse side of the Cooperating Teacher Agreement and Payroll Form. The MU Accounts Payable Office cannot process your payment unless both forms are completed, signed and submitted for each student teacher you sponsor.

COOPERATING TEACHER AGREEMENT AND PAYROLL FORM:

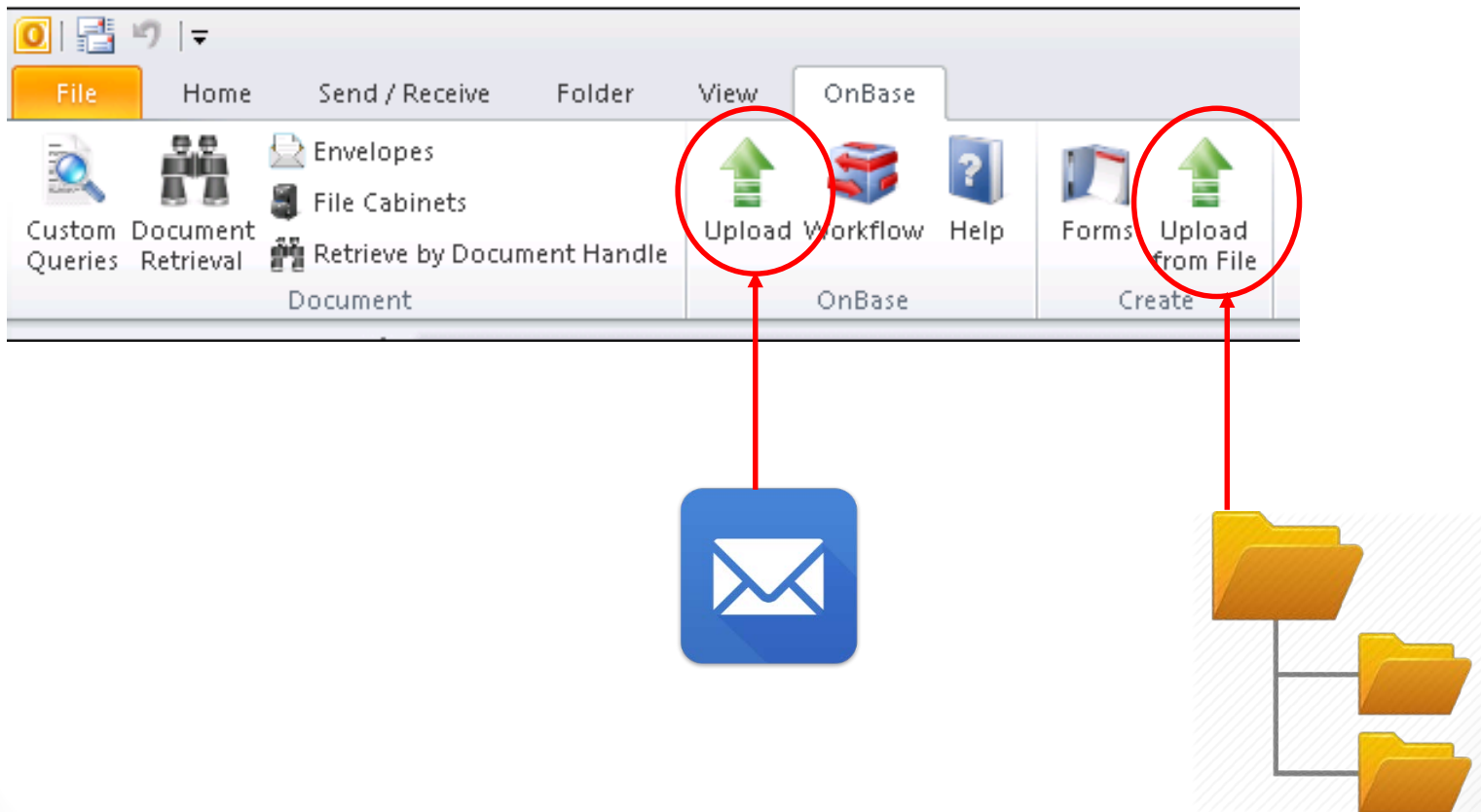
1. Please indicate your legal name as noted on your Social Security Card or your Income Tax Return.
2. Indicate any previous names used, if applicable.
3. Enter your home address – your check will be mailed to this address.
4. Enter your Social Security Number – this is required for payment.
5. Enter your home phone number in case we have to contact you with a question.
6. Complete your professional information; subject you are teaching, grade level, school district and school.
7. Enter the name of the student teacher you will be sponsoring for the semester you are requesting payment.
8. Circle the semester (Fall or Spring) you are sponsoring a student teacher, indicating the year.
9. Circle the time period the student teacher will spend in your classroom.
10. Indicate if you have been paid for sponsoring a MU student teacher in the past. If yes, indicate the number of students you have sponsored. Please note that cooperating teachers are only paid for sponsoring student teachers, not for sponsoring students completing an early field experience.
11. Sign and date the form in the box provided.

PAGE 1
PAGE 2
PAGE 3

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

A handwritten signature in green ink, appearing to read "Mary Jones", written on a light-colored background.

- Signature Pad



Approval Processes

Currently in OnBase

- Payroll – Approval Forms
- Online Programs Admissions
- Graduate Admissions
- Grant Proposals
- Emergency Loans (Financial)
- FAFSA Verification (Electronic)
- Summer Aid App
- Authorization to Release

Fall 2016

- Exception for Graduate
- Cooperating Teacher
- Change of Enrollment

Wish List

- Post Bacc Admission
- Change to Master Schedule
- Facilities Key Requests
- Housing Room Change
- Promotion and Tenure
- Curriculum Workflow
- Summer Contracts
- Travel Forms
- Return of Collections
- Internship Registration (ELCM)

INTER-DEPARTMENTAL MAIL		
Cross out previous address. Use repeatedly until all spaces are utilized		
Name: John Doe	Name: John Doe	Name: John Doe
Dept.: Acct.	Dept.: Acct.	Dept.: Acct.
Name: John Doe	Name: John Doe	Name: John Doe
Dept.: Acct.	Dept.: Acct.	Dept.: Acct.
Name: John Doe	Name: John Doe	Name: John Doe
Dept.: Acct.	Dept.: Acct.	Dept.: Acct.
Name: John Doe	Name: John Doe	Name: John Doe
Dept.: Acct.	Dept.: Acct.	Dept.: Acct.
Name: John Doe	Name: John Doe	Name: John Doe
Dept.: Acct.	Dept.: Acct.	Dept.: Acct.
Name: John Doe	Name: John Doe	Name: John Doe
Dept.: Acct.	Dept.: Acct.	Dept.: Acct.
Name: John Doe	Name: John Doe	Name: John Doe
Dept.: Acct.	Dept.: Acct.	Dept.: Acct.
Name: John Doe	Name: John Doe	Name: John Doe
Dept.: Acct.	Dept.: Acct.	Dept.: Acct.
Name: John Doe	Name: John Doe	Name: John Doe
Dept.: Acct.	Dept.: Acct.	Dept.: Acct.
Name: John Doe	Name: John Doe	Name: John Doe
Dept.: Acct.	Dept.: Acct.	Dept.: Acct.
Name: John Doe	Name: John Doe	Name: John Doe
Dept.: Acct.	Dept.: Acct.	Dept.: Acct.
Name: John Doe	Name: John Doe	Name: John Doe
Dept.: Acct.	Dept.: Acct.	Dept.: Acct.
Name: John Doe	Name: John Doe	Name: John Doe
Dept.: Acct.	Dept.: Acct.	Dept.: Acct.
Name: John Doe	Name: John Doe	Name: John Doe
Dept.: Acct.	Dept.: Acct.	Dept.: Acct.

USE ADDITIONAL SPACES ON BACK OF ENVELOPE.





“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 file system. This is a huge time saver for that is why our organization

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)