Quick Reference – Scanned Document Retention and QA

Each department needs to determine their own retention policy in regards to paper documents that have been scanned and resulting electronic files in OnBase. Please consult with your attorneys to determine this policy.

Given that quality assurances practice in place, all paper documents must be retained for a minimum period of 2 weeks. This will assure that paper documents have been scanned properly and allows time for a full backup to be in place, safeguarding the electronic documents within OnBase.

Quality Assurance of Scanned Documents

1. Locate and double click on the “Hyland Unity Client” icon on your desktop. Onbase can be installed on your machine by contacting the Technical Assistant Center at (717) 871-7777.

2. Log into OnBase using your Millersville domain account. The username will type/display as all caps, however, the password will not.
NAVIGATE TO THE USER ADMINISTRATION

1. Click “Unity” icon in top left corner of screen.
2. Click on “User Administration”
3. Highlight user to edit and click on “User Groups” icon
4. Add or remove groups as appropriate.
(On the right are current groups the user is in, on the left are potential user groups.)

You have completed the steps of administering user groups.