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
Double Click on the document image to retrieve related documents.
You can attach a note to a document
Retrieval

Outlook 2010
Outlook 2013
Retrieval

OnBase

Banner

Banner Integration (SPAIDEN)
Import

Singe File Import

Welcome to OnBase Document Management System

OnBase is Millersville's electronic filing system that stores document images as well as processes documents electronically, reducing paper usage and improving efficiency. OnBase stores student financial aid files, purchasing documents, and grant proposals.

Under User Options/Document Upload check the following:

[Image of OnBase interface showing document upload options]

Quick Tip

[Image of quick tip icon]
Import

**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

• Apply an image of your signature to the document

• Sign document using the mouse

• Signature Pad

Mary Jones 4/4/2016
Approval Processes

Currently in OnBase

• Payroll – Approval Faculty Overload Reports (Deans, Payroll)
• Online Programs Admissions (Student, Online Programs)
• Graduate Admission (Program Coordinators and Grad Office)
• Grant Proposals
• Emergency Loans (FinAid, Housing)
• FAFSA Verification (Edfinancials and FinAid)
• Summer Aid App
• Authorization to Release Fall 2016
• Exception for Graduation (Registrar)
• Cooperating Teacher Payment Form (Accounting, Field Services)
• Change of Enrollment (FinAid)

Wish List

• Post Bacc Admission
• Change to Master Schedule (CMS)
• Facilities Key Request
• Housing Room Change
• Promotion and Tenure Workflow
• Curriculum Workflow
• Summer Contracts
• Travel Forms
• Return of Collections
• Internship Registration (ELCM)
Chris Steuer, Sustainability Manager  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,
- On average it takes only 6 minutes to file and retrieve a paper document, and
  on average is takes 7 minutes to file and retrieve a paper/document.

“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 you file. Then, if a document type or section 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)