MU Document Management System

OnBase technology provides electronic storage of any file type (email, presentations, images, spreadsheets, web forms). Documents can be efficiently routed/reviewed/approved using OnBase technology.

New Features effective Aug 3, 2015...

- PDF's can be split into two or more documents within OnBase
- Appending new pages to an OnBase document is easier
- You can personalize OnBase landing page so that you can quickly navigate to your documents

Quick Reference

- **Faculty/Staff:** Create or Approve a Grant Proposal
- **Faculty/Staff:** Select or Renew a Graduate Assistant
- **Faculty:** Graduate Application Review Process
- **Staff:** Scanning and Indexing paper documents.

FAQs

- How do I open student documents from Banner INB?
- How do I request new OnBase users for my office/department?
- How do I e-mail a document(s) from OnBase?
- Do I need to print and markup a document or can I do that in OnBase?
- What is the difference between OnBase Unity and OnBase Web?
- I am a Mac User, how do I access OnBase? ...If you don't have an IPad...
- Which Browsers are supported? ...If you don't have an IPad...
- I have an IPad, how to I connect to OnBase?
- I walked away from my computer and OnBase made me log in again.
- What mobile devices (tablets, phones) are supported?
- Can I upload an email to OnBase?
- I want to hide sensitive data on the document. How do I permanently erase that information?
- Can I place a note on my document?
- I want to reorder pages, delete pages, append pages, split a document?
- Do I need to print and then scan a document to store it in OnBase?
- How do I print documents from OnBase?
- How do I quickly access documents?
- How do I administer user groups in Unity?
- How do I draw on or highlight documents already in OnBase?
- Once we archive our paper documents electronically, when should our office destroy our paper documents?

How do I open student documents from Banner INB?

From Banner INB you can place your cursor on the M# ID field on any Banner INB form and press and hold CTRL Left Mouse Click. See instructions for more details.

How do I request new OnBase users for my office/department?

Contact the Help Desk and they will create a work ticket for our OnBase Support staff.

How do I e-mail a document(s) from OnBase?

You can either send a document as an attachment (less secure) or embed a Unity link in the email message (most secure and optimal choice).
Do I need to print and markup a document or can I do that in OnBase?

You can markup a document directly in OnBase. The markup feature allows you to highlight, draw lines, freehand, text boxes, draw shapes and many more.

What is the difference between OnBase Unity and OnBase Web?

OnBase Unity can seamlessly interact with applications on your PC like Outlook and Banner INB; it can only be accessed while you are using your machine on campus or remotely via a VMWare client that gives you access to a Windows desktop that has OnBase Unity preinstalled. Call help desk to set this up at (717) 871-7777.

OnBase web is a good application... what is tricky is keeping up with the new Web Browsers that are released. Currently Internet Explorer 9, 10, 11 and Safari 5.1.10+, 6.0.5+, 6.2.0+, 7.1.0+, 8.0.0+, (NOT 9!) and Firefox ESR 31 are supported.

I am a Mac User, how do I access OnBase? ...If you don't have an IPad...

1. Call the help desk to set up a VMWare client that gives you access to a Windows desktop that has OnBase Unity preinstalled. Call help desk at (717) 871-7777.
2. Use SAFARI 5.1.10+, 6.0.5+, 6.2.0+, 7.1.0+, 8.0.0+. NOT Safari 9. Go here -> OnBase Web

Which Browsers are supported? ...If you don't have an IPad...

OnBase Web is supported by Internet Explorer & Safari. Specifically it is supported by Internet Explorer 9, 10, 11 and Safari 5.1.10+, 6.0.5+, 6.2.0+, 7.1.0+, 8.0.0+, (NOT 9) and Firefox ESR 31.

I have an iPad, how to I connect to OnBase?

OnBase can be installed on your iPad. Simply go to the App Store, download "OnBase Mobile" and follow the simple ipad install instructions.

I walked away from my computer and OnBase made me log in again.

If you are not actively using OnBase for more than 30 minutes, OnBase will prompt you to continue using OnBase. If you do not answer the prompt, OnBase will automatically log you off.

What mobile devices (tablets, phones) are supported?

Currently the iPad is the only mobile device directly supported by Millersville's OnBase application. If you want other devices supported, contact the Help Desk (717) 871-7777 and submit your request.

Can I upload an email to OnBase?

You can easily upload emails. Click here for detailed instructions.

I want to hide sensitive data on the document. How do I permanently erase that information?
You are able to permanently block out areas of a document so that sensitive data is not visible to other OnBase users. Please click here for detailed redaction instructions.

Can I place a note on my document?

Yes, Notes can be placed on documents and shared with others or kept private. Click here for detailed instructions.

I want to reorder pages, delete pages, append pages, split a document?

This can be done in Unity using Page Edit mode within the Unity Client.

Do I need to print and then scan a document to store it in OnBase?

No, there is not need to print and then scan your document. You can print directly into OnBase from any application (Adobe, Word, Excel, Web) direct into OnBase using Hyland's Virtual Print Driver.

How do I print documents from OnBase?

Hopefully there is no need to print and you can opt to email a link or attachment. However, if it is necessary, simply click on "Send To" and you will find the option for printing.

How do I quickly access documents?

Custom Queries.

How do I administer user groups in Unity?

You must request special access to administer OnBase security groups. Click here for all of the steps.

How do I draw on or highlight documents already in OnBase?

You can easily Markup documents in OnBase Unity.

Once we archive our paper documents electronically, when should our office destroy our paper documents?

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.
Methods for Accessing Onbase

- On-Campus (OnBase Unity)
- Off-Campus
- Mac Machines
- iPad Tablet
- Outlook 2010 Email

Search OnBase Wiki

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Millersville Technical Assistance Center
(Help Desk)

- web resources
- phone: (717) 871-7777