

## OnBase New Customer Information <sup>[1]</sup>

Are you new to OnBase and Enterprise Content Services? Do you want to start using OnBase in your organization? Start here.

These materials are for CU departments wanting to learn more about OnBase and Enterprise Content Services. You'll work with the UIS Enterprise Content Services Team <sup>[2]</sup> to implement OnBase for your team.

The basic process for onboarding new OnBase customers is:

### Learn More

1. Complete the OnBase New Customer Survey <sup>[3]</sup>
  - This will allow us to understand the scope of your project along with your goals, objectives and timelines.
  - This is a simple OnBase E-Form (Unity form), which gives you an idea of how they can look and behave.
2. Join us for the OnBase Weekly New Customer Onboarding Webinar:
  - Fridays 1:00-2:00 PM Mountain Time  
Zoom Meeting: <https://cusystem.zoom.us/j/96801077385> <sup>[4]</sup>  
If using phone, dial +1 669 900 6833  
Meeting ID: 434 370 129
  - In this webinar, the Enterprise Content Services team <sup>[5]</sup> can provide guidance and assistance with desiging an OnBase solution for your department.
  - Other departments may be on the call; we will use breakout rooms if needed. However, talking together has the benefit of allowing you to trade ideas, recommendations, and experiences with other users.
  - You are welcome to join as often as you like.
3. Create a Hyland Profile <sup>[6]</sup>. Be sure to use **HSI:7995** when creating your profile to have your personal account tied to the CU customer account

This account will allow you to access all of the Hyland-provided services, such as Hyland University (including Premium Subscription content) and Community. This account **does not** provide access to CU's OnBase system, only vendor-provided resources.

4. Using your Hyland Profile, watch these introductory Hyland University videos to get an understanding of the basics of OnBase.
  - Introduction to OnBase <sup>[7]</sup> (19 min) Explore the world of OnBase in this brief, non-technical overview of OnBase

- [End User Essentials: OnBase Unity Client](#) <sup>[8]</sup>(57 min) Explore the basic features and functionality of the OnBase Unity Client (desktop client for Windows)
  - [End User Essentials: OnBase Web Client](#) <sup>[9]</sup>(52 min) Explore the basic features and functionality of the OnBase Web Client (browser-based client)
  - [Unity Forms for End Users](#) <sup>[10]</sup> Explore Unity form functionality in a lab designed for end users. Unity forms are OnBase's electronic forms products.
5. To get a better understanding of how OnBase is implemented at CU and to prepare your organization to use OnBase, watch the CU-provided [OnBase New Customer Presentation](#) <sup>[11]</sup> (45 min) while reviewing the [OnBase New Customer Presentation PowerPoint](#) <sup>[12]</sup>
- Topics include: Service Overview, Architecture & Infrastructure, Configuration, Security, Clients, OnBase Resources

## Get Started

6. Using your Hyland Profile, explore more of the trainings and resources offered by Hyland.
- [Hyland University](#) <sup>[13]</sup> (formerly Training.OnBase.com)
    - eLearning, Self-Paced and Instructor-led courses
    - 200+ hours of [Premium Subscription](#) <sup>[14]</sup> video training
    - [On-demand hands-on training lab environments](#) <sup>[15]</sup>
    - [Learning Paths](#) <sup>[16]</sup>: Each learning path is a logical, step-by-step sequence of OnBase courses focused on a single role, such as [Business Analyst](#) <sup>[17]</sup>, [Workflow Administrator](#) <sup>[18]</sup>, [Forms Developer](#) <sup>[19]</sup>.
  - [OnBase Community](#) <sup>[20]</sup>
    - [OnBase Guides](#) <sup>[21]</sup>: Discover valuable business content, technical information, presentations and Q&A forums.
    - [OnBase Technical Support Knowledge Base](#) <sup>[22]</sup>: New articles are continually added to the Knowledge Base by Hyland's Technical Support team.
    - Join the [Higher Ed User Group](#) <sup>[23]</sup> for information on webinars and opportunities to share with and learn from other institutions.
7. Consider OnBase Certifications (optional).

Hyland offers a variety of certifications, such as [OnBase Certified System Administrator \(OCSA\)](#) <sup>[24]</sup> and [OnBase Certified Workflow Administrator \(OCWA\)](#) <sup>[25]</sup>.

If your department does not obtain certification, the [Enterprise Content Services team](#) <sup>[5]</sup> at UIS will complete configuration for your department.

In order for your department to configure OnBase and access advanced functionality, a member of your department will need to complete the System Administrator certification.

More information about certifications is available on our [Online Training and Certifications](#) <sup>[26]</sup> page.

8. Read through the CU-provided [OnBase New Customer Packet](#) <sup>[27]</sup>, which includes:
- OnBase Support information

- Scope of expectations for communication, training, organizational readiness
- Roles and Responsibilities
- Content Services Go-live Checklist

## Implementation

9. When ready, begin working on the CU-provided [OnBase Configuration Template](#) <sup>[28]</sup>
  - This spreadsheet will help you define the Document Types, Document Types Groups, Keyword Types, Keyword Type Groups, Users and User Groups for your organization.
  - The Enterprise Content Services team <sup>[5]</sup> (or your departmental certified administrator) will complete configuration based on this template.
  - The following OnBase Reporting Dashboards contain information about existing OnBase configurations which may be helpful while completing the template.
    - [OnBase Doctypes, Doctype Groups, Keyword Groups, and AutoName Strings](#) <sup>[29]</sup>: See what document types and document type groups are in use by other departments at CU (requires connection to campus network or VPN).
    - [OnBase Keyword List](#) <sup>[30]</sup>: These are the keyword types that are already configured and in use. These can be used on your new document types as well, in addition to any new keyword types you need (requires connection to campus network or VPN).
    - [Functional Security Group Definitions](#) <sup>[31]</sup>: Details of what privileges and permissions are granted to each functional level group.

10. Once configuration is complete, you will need to verify and test prior to go-live.

More details are included in the [OnBase New Customer Packet](#) <sup>[27]</sup>.

11. The Enterprise Content Services team <sup>[5]</sup> can assist with large imports of files you already have saved.

Content import can be automated under certain conditions. Please work with the Enterprise Content Services team <sup>[5]</sup> early on to minimize manual processing.

Some departments choose to work with a third-party vendor for large scanning projects. Contact the Enterprise Content Services team <sup>[5]</sup> for more information.

12. The Enterprise Content Services team <sup>[5]</sup> will come to your location for end-user training.

More details are included in the [OnBase New Customer Packet](#) <sup>[27]</sup>.

Additional training materials and resources are available on the [OnBase Training page](#) <sup>[32]</sup>.

Please reach out to the [UIS Enterprise Content Services Team](#) <sup>[33]</sup> if you have any questions.

---

# Documents & Links

[OnBase New Customer Presentation.mp4](#) [11]

[OnBase New Customer Presentation.pptx](#) [12]

[OnBase New Customer Packet](#) [27]

[OnBase Configuration Template](#) [28]

---

## Groups audience:

University Information Services

## Right Sidebar:

OnBase Training and Support

UIS - OnBase Online Training and Certifications

UIS: Enterprise Content Services Service Catalog - OnBase

UIS - Enterprise Content Services Campus Contacts

---

**Source URL:** <https://www.cu.edu/uis/onbase-new-customer-information>

## Links

[1] <https://www.cu.edu/uis/onbase-new-customer-information>

[2] [mailto:UIS\\_DM\\_SUPPORT@cu.edu?subject=OnBase](mailto:UIS_DM_SUPPORT@cu.edu?subject=OnBase)

[3] [\[unityform.prod.cu.edu/UnityForms/UnityForm.aspx?d1=AeLXJebu9poDhWOI8fgveJd71p68r5A5QJwA49y43Au7dO\]\(https://dm-unityform.prod.cu.edu/UnityForms/UnityForm.aspx?d1=AeLXJebu9poDhWOI8fgveJd71p68r5A5QJwA49y43Au7dO\)](https://dm-</a></p></div><div data-bbox=)

[4] <https://cuseystem.zoom.us/j/96801077385> [5] [mailto:UIS\\_DM\\_SUPPORT@cu.edu](mailto:UIS_DM_SUPPORT@cu.edu)

[6] <https://profiles.onbase.com/NewProfile> [7] <https://training.hyland.com/courses/P0525-Introduction-to-OnBase>

[8] <https://training.hyland.com/courses/P1813-End-User-Essentials-OnBase-Foundation-Unity-Client>

[9] <https://training.hyland.com/courses/P1812-End-User-Essentials-OnBase-Foundation-Web-Client>

[10] <https://training.hyland.com/courses/P1799> [11] <https://www.cu.edu/video/onbase-new-customer-presentationmp4>

[12] <https://www.cu.edu/doc/onbase-new-customer-presentationpptx>

[13] <https://university.hyland.com/> [14] <https://training.hyland.com/Premium>

[15] <https://training.hyland.com/premium/hands-on-lab-courses> [16] <https://training.hyland.com/paths>

[17] <https://training.hyland.com/paths/customer/I0001-business-analyst>

[18] <https://training.hyland.com/paths/customer/onbase-workflow-administrator>

[19] <https://training.hyland.com/paths/customer/I0028-forms-developer> [20] <https://community.hyland.com/>

[21] <https://community.hyland.com/products/onbase> [22] <https://community.hyland.com/tskb>

[23] <https://community.hyland.com/connect/higher-education-vogue>

[24] <https://training.hyland.com/certifications/ocsa> [25] <https://training.hyland.com/certifications/ocwa>

[26] <https://www.cu.edu/uis/onbase-online-training-and-certifications> [27] <https://www.cu.edu/doc/onbase-new-customer-packetpdf>

[28] <https://www.cu.edu/doc/onbase-configuration-templatempx>

[29]

<http://dm.prod.cu.edu/ReportingViewerPublic/Viewer.aspx?enc=AXHP2vGpl1C0RzTH3UIwJ/hN30kG6OWfFuIEDfP>

[30]

<http://dm.prod.cu.edu/ReportingViewerPublic/Viewer.aspx?enc=Afle17dpx%2bkaCdg%2foiiDF%2bRC4xE%2bMzK>

[31] <https://www.cu.edu/doc/onbase-configuration-functional-security-groupsxlsx>

[32] <https://www.cu.edu/uis/onbase-training>

[33] [mailto:UIS\\_DM\\_SUPPORT@cu.edu?subject=OnBase%20New%20Customer%20Question](mailto:UIS_DM_SUPPORT@cu.edu?subject=OnBase%20New%20Customer%20Question)