Published on *University of Colorado* (https://www.cu.edu)

CU's OnBase upgrade one of the most successful in Hyland's history [1]

December 1, 2017 by Employee Services [2]

At the University of Colorado's University Information Systems, we pride ourselves on the impactful work we do. There is no clearer example of this than CU's recent conversion to OnBase by Hyland – one of the largest and most successful conversions the platform's history – which wrapped up this fall.

OnBase allows users to manage and track documents. Starting when a form is created, OnBase stores an electronic version document, manages workflows for that document (for example, tracking all the steps needed for approval), sends emails to users about the status of their forms, and allows for easy case management. It also serves as a records repository.

In July 2016, the transition from Singularity to document management solution OnBase [3] began. The tailored, phased implementation across four CU campuses began in financial aid and extended to more than 120 additional offices. Because the project was so large, UIS teams took a four-stage phased approach to its implementation: needs assessment, mapping, migration and validation.

"We took a customer service approach to our OnBase implementation and conversion, and tailored it to the specific needs of each department to ensure successful adoption by our 3,000 users," said Alan Vidmar, UIS Assistant Director of Enterprise Content Services. "The Hyland services team provided the right amount of autonomy and capability, consistently supporting our path forward with expertise and knowledge to make the best decisions throughout."

Each campus department collaborated with UIS to perform these steps, which ensured a smooth transition that met each department's unique needs and business processes. In the end, **120 departments** and **nearly 3,000 users** across all four campuses were converted at different times throughout the project, depending on departmental business calendars.

Why did we convert to OnBase?

Singularity is no longer supported by the vendor, making the conversion necessary.

OnBase provides multiple advantages. It delivers an enhanced user experience with modernized interfaces for our Web and Unity clients. It is also more powerful, more configurable and more capable of integrating with core business applications. Additionally, OnBase increases access speed to important information, lowers departmental costs, supports productivity and efficiency, minimizes compliance risks and secures business content in a centralized, secure location.

What's next?

In the future, teams would like to expand the software to more customers and add the following elements to its functionality:

- Mobile
- Mailbox Importer
- Public Reporting Dashboards
- Transcript OCR

- Increased HCM integration
- DocuSign
- Document Packets

“We'll never be done – and that's a good thing. We are impactful at the university, and that means we are continuing to drive return on investment from the institutional investments,” Vidmar said. “We now have a queue of more than 25 more ‘customers’ who will be onboarded."

Notable accomplishments

During this process, nearly **15 million** documents were converted from Singularity and a variety of document types, keywords, workflows, scripts and electronic forms were recreated. However, this is only a small portion of achievements from the project.

To gain a bigger picture of just how much work went into the conversion, review the following infographic:

OnBase

Project Metric

Since 2016, UIS has successfully adapted campus office
See all they have accom

CONVERS

130 e-forms recreated

14.9 million documents converted

2,111 docu types recre

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