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CU I&E Submission: Leveraging OnBase for Campus-wide Student Employee Termination Process [1]

Category

Customer Service
HR Management

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Project Description

This project took an existing pdf form and created a revamped form within OnBase. To make the process easier for our business partners, we built in the workflow to route the form to the supervisor and department approver for electronic signatures. Once all signatures have been received, an email is sent back to the form completer, supervisor, and department approver with the fully signed document for their personnel files. In addition, an email is generated that submits the form to our Cherwell ticketing system. Based on the information in that email, the Cherwell system accurately categorizes the ticket and provides information to easily match the ticket with the submitted form in OnBase. The OnBase form includes a department only section and once completed is stored in the correct doc class within OnBase.

Project Efficiency

We have reduced the number of outdated forms our office receives, improved the information received on the forms, and are able to update the form in real time. Specifically, when the department list in HCM changes, we can run a csv file and easily update saving at least 10 minutes per form with ensuring that all departments are reflected accurately. We have also saved time within our office with not having to save and update pdfs and then upload those completed termination forms into OnBase for storage. OnBase is the system of record. By having this document within the system of record, we have secured HR data as the form

starts and lives in OnBase.

Project Inspiration

This project was inspired by a desire to make the termination process easier for our business partners, who had expressed frustration with existing pdf documents that did not always work well with Adobe Sign. Additionally, business partners did not always have access to Adobe Sign but wanted an easier way to transition to digital personnel file management. Within the Student Employment Office, the inspiration was to gain efficiencies with updating documents and save time by eliminating additional work to then store completed documents in OnBase.

What Makes You Happiest about this Project?

What we are happiest about so far is the positive feedback from our campus business partners. Our plan all along was to implement this process with several of our other forms too, which campus partners are now asking for. We started with the termination notice because it has the easiest workflow and are excited to expand to our other processes. Knowledge gained from this project has proven versatile in that we were able to transcend this HR solution into an outward facing student/parent process improvement within the Financial Aid Office. Customer service has been improved across functions.

Additional Information

Source URL:https://www.cu.edu/controller/i-e-awards/past-submissions/cu-ie-submission-leveraging-onbase-campus-wide-student

Links
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