Enterprise Content Services - OnBase

Overview

A single enterprise information platform for managing content, processes and cases

Enterprise Content Services can transform your organization by managing your content, processes and cases on a single platform. Whether you implement a single departmental solution or deploy solutions across the entire enterprise, you will increase productivity, reduce operating costs and minimize risk. Improve your level of service by empowering your employees with the information they need, when they need it and minimize your compliance and eDiscovery risks.

CU's current application for Enterprise Content Services is OnBase. OnBase provides a single platform on which to build content-enabled applications. With one system to support, maintain and upgrade, this offers a low total cost of ownership and minimizes IT sprawl.

- Maintain copies of your most critical business documents in a high-capacity, high-availability electronic content repository
- Intelligently manage records throughout their entire lifecycle—from inception to management to archiving to destruction
- Easily share information through a solution that supports all aspects of electronic document processing with common software
- Data can flow across the various organizations to promote efficient and consistent business processes
- Rapid Application Development - low-code rapid application configuration to create content-enabled solutions across the entire enterprise
- Easy to use, easy to implement, easy to manage

Direct and Intuitive Benefits

- Faster business transactions
- Increased access to information
- Increased data integration across applications
- Fewer errors
- More effectively integrated systems
- Ease of support

- Central authentication and authorization systems
- Reduced software costs with Enterprise licensing
- Improved performance of professional staff, due to enhanced management information capabilities
- Automated process steps facilitate faster processing of information
- Enhanced agency reputation

More than just services

- **Capture**
  - Automate multi-channel capture of physical and electronic content:
    - direct import from various sources
    - automated content classification
    - automated data extraction & validation

- **Content Management**
  - Organize, manage and optimize content across the entire organization:
    - version control
    - annotations
    - digital signatures

- **Process Automation**
  - Automate tasks, route documents, and manage process exceptions:
    - workflows and approvals
    - electronic forms
    - process mining

- **Capture documents and data**: Scan paper documents, Import electronic documents and information, Collect information in electronic forms, Extract data from your documents
- **Content Management**: Revisions, Electronic signatures, Docusign Integration, Rapidly
distribute the right documents to the right employees, Easily track and prove employee
acknowledgements for regulatory compliance audits, Full auditing of all end user and
administrative user actions
- **Process Automation**: Business process management (BPM), Automates repetitive
tasks and rule-based decisions, Manages complex approval processes, Identifies and
verifies related documents, Load-balances work across teams
- **Workflow Automation**: Industry leading workflow engine, Rich set of point-and-click
configurable rules and actions allowing business processes to be quickly automated with
no need for custom coding
- **Case Management**: Centralizes all information surrounding a case and provides users
with all the tools they need – whether they’re resolving an issue, managing a claim,
fulfilling a service request or onboarding an employee. Point-and-click configurable
platform. Rapidly configure content-enabled business applications with a low-code
platform
- **Collaboration**: Securely share content and collaborate on processes and documents.
Coauthoring with version control. Tasks and notifications. Enhanced security and control.
- **Customer Communications Management**: Automated business process and workflow
notifications, Template based communication: Dynamically aggregate information from
multiple data sources, including external data sources, user inputs and system values,
Flexible distribution options including e-mail, print, and automatic archiving, Flexible
security options on both templates and final documents, Leverage external data in
documents using XML, SQL statements or Unity Scripts
- **Reporting and Analytics**: Business process analytics, Eliminate blind spots and
maintain clarity with business process visibility, Document process intelligence analyzes
business process quality in near real time, Actionable process insights detail which
business process improvements are required.
- **Search**: Full Text Search across all content, Unify access to all of your information,
Extract more meaning and insight from your content
- **Retention and Records Management**: Minimize risk and support compliance by
securely storing, protecting and destroying your information in accordance with
applicable regulations – without needing to purchase additional third-party software or
hardware. Via powerful encryption, OnBase secures your important data when it’s at
rest, in motion and being accessed. Simplify the implementation of retention plans and
policies. When content is ready for disposition, OnBase sends it for review or
automatically destroys it according to your requirements.
- **Access content from anywhere**: A personalized, intuitive user interface, Web clients,
Windows clients, Mobile clients, MS Office Integration
- **Integrate**: Purpose-built integrations for many widely-adopted applications, including
PeopleSoft, Microsoft Office, DocuSign, MDM Search Match, SAML SSO, Data-level
integrations, Web Service integrations

**Metrics**
### Use Cases: Content Archives

**Historical Records:**
Permanent Record Cards (PRCs). All historical student class and grade information from the university’s founding until 1988.

**Student Content:**
Transcripts, applications, appeals, resumes, etc. Content for financial aid, student records, student finance, student advising, continuing education, disability services and more.

**Faculty/Staff/Employee Content:**
Personnel files, benefits, leave, job data, performance management and other human resource content.

**Financial Content:**
Contracts, Journal entries, allocation documents, asset tag information and other financial content.

**Governmental Content:**
Selective Service, DD214, etc.

**Business Support Content:**
Content that supports operational work of the university such as annual reports, budget proposals, correspondence, meeting materials.

### Use Cases: Process Management

**Tuition Assistance Benefit:**

Used by System Administration and all campuses (Student Records and Student Financials) to process tuition benefit applications

**Functionality:** OnBase Unity forms, workflow, data integrations, notifications, reporting dashboards, ShareBase

<table>
<thead>
<tr>
<th>Colorado</th>
<th>OnBase Users</th>
<th>%</th>
<th>Student Content</th>
<th>%</th>
<th>Employee Content</th>
<th>%</th>
<th>Finance Content</th>
<th>%</th>
<th>Security Content</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boulder</td>
<td>3,462</td>
<td>50%</td>
<td>12,745,826</td>
<td>59%</td>
<td>1,155,127</td>
<td>21%</td>
<td>21,494</td>
<td>60%</td>
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<td>46%</td>
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<tr>
<td>Denver</td>
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<td>20%</td>
<td>4,513,263</td>
<td>21%</td>
<td>256,016</td>
<td>5%</td>
<td>8,869</td>
<td>25%</td>
<td>12,173</td>
<td>22%</td>
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<tr>
<td>Anschutz</td>
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<td>5%</td>
<td>76,456</td>
<td>0%</td>
<td>57,956</td>
<td>1%</td>
<td>557</td>
<td>2%</td>
<td>0</td>
<td>0%</td>
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<tr>
<td>Colorado Springs</td>
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<td>18%</td>
<td>2,507,885</td>
<td>12%</td>
<td>90,713</td>
<td>2%</td>
<td>231</td>
<td>1%</td>
<td>5,323</td>
<td>10%</td>
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<tr>
<td>System Cross Campus</td>
<td>500</td>
<td>7%</td>
<td>296,680</td>
<td>1%</td>
<td>3,937,324</td>
<td>72%</td>
<td>4,770</td>
<td>13%</td>
<td>12,714</td>
<td>23%</td>
</tr>
</tbody>
</table>

**Totals:**
6,976 | 21,434,968 | 72% | 5,497,365 | 19% | 35,921 | 0% | 55,670 | 0% | 2,640 |

Updated: 03/31/2023
**Description**: Employees submit forms to use the Tuition Assistance Benefit in the portal. Upon submission, forms are saved in OnBase and enter workflow. Employee Services reviews employee and dependent eligibility (if applicable). Once Employee Services processing is complete, forms are routed to the campus of enrollment. There, course eligibility is reviewed. If approved, workflow aids in processing of waivers in Campus Solutions depending on the campus process.

Confirmation notifications are sent and stored in OnBase associated with either the employee file or the student record as applicable.

OnBase Reporting Dashboards provide information on benefit usage by campus, term, waiver type, outcome, and more.

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**Course Request Form:**

Used by Boulder Continuing Education Student Records

**Functionality**: OnBase Unity forms, workflow, data integrations, notifications, reporting dashboards, ShareBase

**Description**: Students submit forms to request course enrollment. Campus Solutions data is used to help students complete the form with accurate course information for the selected semester. Upon submission, forms are saved in OnBase and enter workflow. Staff review student requests and students receive a notification that indicates the outcome for each class they've requested.

If additional documentation is needed, staff can request more information using a link to a personal, secure folder where students can add their documentation. Submitted documentation is imported to OnBase and associated with the student record, easily
accessible to staff as they review requests.

OnBase Reporting Dashboards provide information on volume by term, outcome, and status of pending requests.

**Use Cases: Case Management**

**Graduate Appointments:**
Used by Boulder Graduate School
Used to track appointments to advisory committees and when those appointments expire.

**New OnBase Customer Projects:**
Used by UIS Enterprise Content Services
Used to organize documents, notes, and contact information for projects as new departments implement OnBase solutions [3]. Uses employee data from HCM.

**Current Service Users**

If your department would like to begin using OnBase, please go to our New Customer Information page [3].
Support Model

A Decentralized Administration model allows departments the flexibility, agility, and independence to build their own solutions while also contributing to the overall service. Select users can be trained and certified by Hyland Software [4] to become OnBase Certified Department Administrators [5] that can manage the OnBase configuration process, Workflows, Unity forms and other related responsibilities at the departmental level. There are now a multitude OnBase Certified Department Administrators across the university system supporting administrative, research and education solutions. The UIS Enterprise Content Services Team [6] plays a consulting role with these certified administrators and a direct support role for all other areas that do not have a certified admin on staff. We encourage new customers [3]
to consider the certification option for their implementation.

SUPPORT MODEL

Funding Model

There is no cost to CU departments to utilize Enterprise Content Services. This system is funded through the campuses like other enterprise apps.

Eligibility to use the service

Administrative, Academic and Research groups are welcome to participate if they have a direct University affiliation.
Alias Information/Service History

DMO, OnBase is a product of Hyland Software, replaces Singularity (DMS)

Groups audience:
University Information Services

Right Sidebar:
UIS - Request Enterprise Content Services
OnBase Training and Support
UIS - OnBase Online Training and Certifications
UIS - Enterprise Content Services Campus Contacts
UIS - Learn about the Singularity to OnBase Conversion Project

Source URL: https://www.cu.edu/uis/service-catalog/enterprise-content-services

Links