

# ONBASE FOR HIGHER EDUCATION SOLUTION CATALOG

Click a department to learn more:



INFORMATION TECHNOLOGY



FACILITIES



AUXILIARY



ADVANCEMENT



SENIOR ADMINISTRATION



STUDENT AFFAIRS



HUMAN RESOURCES



BUSINESS OFFICE



ENROLLMENT MANAGEMENT



ATHLETICS



CLICK HERE TO SEARCH  
BY CORE FUNCTIONALITY

One platform  
Unlimited potential

**OnBase**  
by Hyland

# ADVANCEMENT



Click an office to discover solutions:

## All offices

- Constiuent File Management
- Donor Correspondence Management
- Gift Agreement Management
- Gift Processing
- President Meeting/Event Request Form
- Physical Records Management



# ATHLETICS



Click an office to discover solutions:

## All offices

- Athletic Academic Eligibility Tracking
- Athlete Accommodations
- Athletics Forms Processing
- Athletic Historical Records Management
- Camp & Workshop Registration Processing
- Equipment Management
- Policy Acknowledgements
- Red Shirt Applications
- Roster Management
- Sports Medicine Document Management
- Student Athlete Advising
- Student Recognition & Awards
- Title IX Compliance Management

# AUXILIARY



Click an office to discover solutions:

[Campus Security](#)

[Dining Services](#)



Click an office to discover solutions:

Campus Security

Campus Safety Tracking

Dining Services

# AUXILIARY



Click an office to discover solutions:

Campus Security

Dining Services

Food Waiver

**Dining Services**

# BUSINESS OFFICE



Click an office to discover solutions:

[Bursar's Office](#)

[Finance](#)

[Other](#)

# BUSINESS OFFICE



Click an office to discover solutions:

## Bursar's Office

Finance

Other

General File Management

Student Billing

Tuition Remission



# BUSINESS OFFICE



Click an office to discover solutions:

Bursar's Office

**Finance**

Other

- Accounts Payable
- Accounts Receivable
- Contract Management
- Corrections and Journals
- Effort Reporting Distribution
- Financial Close Process
- Invoice Processing
- Procurement & Purchasing
- Purchasing Card Request
- Requisition Processing
- Student Club Reimbursement
- Travel and Expense Preauthorization
- Travel and Expense Reimbursement
- Vendor Management
- Voucher Build
- Wage Transfer Processing

# BUSINESS OFFICE



Click an office to discover solutions:

Bursar's Office

Finance

**Other**

Real Estate

# ENROLLMENT MANAGEMENT



Click an office to discover solutions:

[Admissions](#)

[Advising](#)

[Financial Aid](#)

[Registrar's Office](#)

# ENROLLMENT MANAGEMENT



Click an office to discover solutions:

## Admissions

Advising

Financial Aid

Registrar's Office

Admissions Appeals

Admissions Processing and Review

Alumni Interview Management

Applicant Criminal Disclosure

Applicant Interview Management

Checklist Updating

Consortium/Study Abroad Processing

Graduate Admissions Processing and Review

I-20 Processing

Loose Credential Matching

Mailroom Automation

Mobile Prospect Cards

Physical Records Management

Readmission Processing

Residency Review

Veteran Services

# ENROLLMENT MANAGEMENT



Click an office to discover solutions:

Admissions

At-Risk Student

Student Advising

**Advising**

Financial Aid

Registrar's Office

# ENROLLMENT MANAGEMENT



Click an office to discover solutions:

Admissions

Advising

**Financial Aid**

Registrar's Office

Admissions Reapply Process

Campus Safety Tracking

Checklist Updating

Consortium/Study Abroad Processing

Dependency Review

Financial Aid Appeals

Financial Aid Verification

Leave of Absence

Permanent Withdrawal

Professional Judgement Appeals

Satisfactory Academic Progress Appeals

Student Job Application

Veteran Services

# ENROLLMENT MANAGEMENT



Click an office to discover solutions:

Admissions

Advising

Financial Aid

**Registrar's Office**

Academic Petition, Substitutions, and Waivers

Consortium/Study Abroad Processing

Distance Learning/eLearning

Grade Change Forms

Graduation Exception Processing

Petition to Graduate

Physical Records Management and Disposition

Registrar Forms Processing

Residency Review

Student File Management

Transcript Capture

Transfer Course Evaluation

Tuition Remission



# FACILITIES



Click an office to discover solutions:

Physical Plant

Student Housing

Other

# FACILITIES



Click an office to discover solutions:

## Physical Plant

Student Housing

Other

- Electronic Plan Review
- Facilities Drawings and Manuals Management
- Service Request Management

# FACILITIES



Click an office to discover solutions:

Physical Plant

Room Condition Tracking

**Student Housing**

Other

# FACILITIES



Click an office to discover solutions:

Physical Plant

Student Housing

Other

- Asset Management
- Contract Management
- Vendor Management

# HUMAN RESOURCES



Click an office to discover solutions:

## All offices

Accommodation Correspondence Management  
Accommodation Fulfillment  
Asset Tracking  
Complaint/Grievance Management  
Contract Management  
Employee Change Request  
Employee File Management  
Employee Onboarding/Separation  
Faculty Leave Documentation  
HR Employee Review  
I-9 Processing  
Personnel Action Requests  
Policies and Procedures  
RA Application  
Recruiting and Selection  
Staff Position Request  
Student Job Application  
Tuition Remission

# INFORMATION TECHNOLOGY



Click an office to discover solutions:

## All offices

- Asset Management
- Help Desk
- IT Change Management
- System Access Requests

# SENIOR ADMINISTRATION



Click an office to discover solutions:

[General Counsel](#)

[Office of the President](#)

[Office of Sponsored Projects](#)

[Provost](#)



# SENIOR ADMINISTRATION



Click an office to discover solutions:

## General Counsel

Office of the President

Office of Sponsored Projects

Provost

- Contract Management
- FERPA Requests
- Freedom of Information Act (FOIA) Solution
- Legal Case Management

# SENIOR ADMINISTRATION



Click an office to discover solutions:

General Counsel

**Office of the President**

Office of Sponsored Projects

Provost

- Agenda Management
- Board and Trustee Minutes
- One Student Record
- President’s Office Correspondence Management

# SENIOR ADMINISTRATION



Click an office to discover solutions:

General Counsel

Office of the President

**Office of Sponsored Projects**

Provost

- Grants Management
- Research Program: Criminal Justice Case Management
- Research Program: Family & Marriage Research Tracking
- Research Program: Police Crime Tracking

# SENIOR ADMINISTRATION



Click an office to discover solutions:

General Counsel

Office of the President

Office of Sponsored Projects

**Provost**

- Accreditation Management
- Camp & Workshop Registration Processing
- Competency Based Education Program Management
- Curriculum Review
- Faculty Budget Tracking
- Faculty Onboarding
- Faculty Services
- Honors Course Review
- Tenure and Promotion

# STUDENT AFFAIRS



Click an office to discover solutions:

[Disability Resources](#)

[Other](#)



Click an office to discover solutions:

**Disability Resources**

Other

- Accommodation Correspondence Management
- Accommodation Fulfillment
- Asset Tracking

# STUDENT AFFAIRS



Click an office to discover solutions:

Disability Resources

Other

Incident Case Management

Intramural Sports Registration

Judicial Board Review

RA Application

Student Health Services

Student Legal Assistance

Title IX Compliance Management



# CORE FUNCTIONALITY

Click a functionality to discover solutions:

Business Process Automation

Capture

Case Management

Document Management

Electronic File Sync and Share

Integration

Reporting

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Reporting

AAEC Complaint/  
Grievance

Academic Petition,  
Substitutions, and  
Waivers

Accommodation  
Correspondence  
Management

Accounts Payable

Accounts Receivable

Admissions Appeals

Admissions Processing  
and Review

Admissions Reapply  
Process

Agenda Management

Alumni Interview  
Management

Applicant Criminal  
Disclosure

Athletic Academic  
Eligibility Tracking

Athletics Forms  
Processing

Board and Trustee  
Minutes

Camp & Workshop  
Registration Processing

Checklist Updating

Consortium/Study Abroad  
Processing

Contract Management

Corrections and Journals

Curriculum Review

Dependency Review

Dining Services

Distance Learning/  
eLearning

Effort Reporting  
Distribution

Electronic Plan Review

Employee Change Request

Employee Onboarding/  
Separation

Equipment Management

Faculty Leave  
Documentation

Faculty Onboarding

FERPA Requests

Financial Aid Appeals

Financial Aid Verification

Financial Close Process

Food Waivers

Freedom of Information  
Act (FOIA) Solution

Gift Agreement  
Management

Gift Processing

Grade Change Forms

Graduate Admissions  
Processing and Review

Grants Management

Honors Course Review

HR Employee Review

I-9 Processing

I-20 Processing

Intramural Sports  
Registration

Invoice Processing

IT Change Management

Judicial Board Review

Leave of Absence

Legal Case Management

Loose Credential Matching

Mobile Prospect Cards

Permanent Withdrawal

Personnel Action  
Requests

Petition to Graduate

Policy Acknowledgements

President Meeting/Event  
Request Form

President's Office  
Correspondence  
Management

Procurement &  
Purchasing

Professional Judgement  
Appeals

RA Application

Readmission Processing

Real Estate

Recruiting and Selection

Red Shirt Applications

Registrar's Forms  
Processing

Requisition Processing

Residency Review

Roster Management

Satisfactory Academic  
Progress Appeals

Service Request  
Management

Staff Position Request

Student Athlete  
Advising

Student Billing

Student File  
Management

Student Job Application

Student Recognition &  
Awards

System Access  
Requests

Tenure and Promotion

Transcript Capture

Transfer Course  
Evaluation

Travel and Expense  
Preauthorization

Travel and Expense  
Reimbursement

Tuition Remission

Voucher Build

Wage Transfer  
Processing

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Accounts Payable

Accounts Receivable

Accreditation Management

Admissions Processing and Review

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Athletic Historical Records Management

Camp and Workshop Registration Processing

Checklist Updating

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Contract Management

Distance Learning/eLearning

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Employee Onboarding/Separation

Facilities Drawings and Manuals Management

Faculty Leave Documentation

Faculty Onboarding

Financial Aid Verification

Gift Agreement Management

Gift Processing

Graduate Admissions Processing and Review

I-20 Processing

Incident Case Management

Invoice Processing

Judicial Board Review

Leave of Absence

Legal Case Management

Mailroom Automation

Mobile Prospect Cards

One Student Record

Policies and Procedures

Real Estate

Residency Review

Sports Medicine Document Management

Student Health Services

Student Job Application

Student Legal Assistance

Student Recognition and Awards

Tenure and Promotion

Transcript Capture

Transfer Course Evaluation

Veteran Services

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**Case Management**

Document Management

Electronic File Sync and Share

Integration

Reporting

Accommodation Fulfillment

Alumni Interview Management

Asset Management

Asset Tracking

Athlete Accommodations

Athletic Academic Eligibility Tracking

Campus Safety Tracking

Competency Based Education Program Management

Contract Management

Criminal Justice Case Management

Effort Reporting Distribution

Equipment Management

Family and Marriage Research Tracking

Grants Management

Help Desk

Incident Case Management

I-9 Processing

Legal Case Management

One Student Record

Police Crime Tracking

Physical Records Management

Room Condition Tracking

Roster Management

Student Advising

Student Athlete Advising

Student Health Services

Student Legal Assistance

Title IX Compliance Management

Vendor Management

Veteran Services

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Constituent File Management

Donor Correspondence Management

Employee File Management

Employee Onboarding/Separation

Facilities Drawings and Manuals  
Management

Faculty Leave Documentation

Financial Aid Verification

General File Management

Gift Processing

Graduate Admissions Processing and  
Review

Invoice Processing

Mobile Prospect Cards

Physical Records Management

Policies and Procedures

Policy Acknowledgements

Sports Medicine Document Management

Student Recognition and Awards

Tenure and Promotion

Transcript Capture

Transfer Course Evaluation

# CORE FUNCTIONALITY

Click a functionality to discover solutions:

Business Process Automation

Capture

Case Management

Document Management

**Electronic File Sync and Share**

Integration

Reporting

Accreditation Process

Admissions Processing and Review

Advancement Campaign Planning

Campus RFP Processes

Curriculum Review

Electronic Plan Review

Employee Recruitment and Hiring

Facilities Planning and Project  
Documentation

Financial Aid Verification

Formal Gift Contracts

General Board Planning and Agendas

Gift Agreement Management

Gift Processing

Legal Office

Outside Agency/Community Advocacy

Tenure and Promotion

Vendor Contracts

# CORE FUNCTIONALITY

Click a functionality to discover solutions:

Business Process Automation

Capture

Case Management

Document Management

Electronic File Sync and Share

**Integration**

Reporting

Accounts Payable

Accounts Receivable

Admissions Processing and Review

Athletic Academic Eligibility Tracking

Checklist Updating

Financial Aid Verification

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Gift Processing

Graduate Admissions Processing and Review

Invoice Processing

Loose Credential Matching

One Student Record

Procurement & Purchasing

Student Advising

Transcript Capture

Transfer Course Evaluation

Vendor Management



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Effort Reporting Distribution

Financial Aid Verification

Gift Agreement Management

Gift Processing

Graduate Admissions Processing and Review

Invoice Processing

One Student Record

Policy Acknowledgements

Student Advising

Student Athlete Advising

Transcript Capture

Transfer Course Evaluation

Solution details coming soon

[« BACK TO CAMPUS MAP](#)



## CONSTITUENT FILE MANAGEMENT

To build and maintain strong relationships with existing and prospective donors, Advancement, Development and Alumni Affairs staff must be fully informed. However, paper-based filing makes it difficult to keep constituent files complete and up-to-date. In addition, once a gift officer is on the road, he has little to no access to new information, causing missed opportunities to leverage donor meetings to their fullest potential.

OnBase provides staff members and leadership with a thorough, digital, constituent knowledge base. As new information arrives, OnBase instantly updates electronic donor files, creating a secure, centrally managed file that authorized users can access and update from anywhere, with any device – even tablets and smart phones. With virtual printing capabilities, officers on the road can import new information – such as a press release found on the donor’s business website – directly into the donor file. OnBase ensures research information is available in the timeliest manner and makes it accessible when a gifts officer needs it.

### BENEFITS

- ✓ Eliminates security risks associated with hard-copy files and increases credibility with donors
- ✓ Offers quick, secure, remote access to constituent files
- ✓ Integrates seamlessly with your CRM system

### CORE COMPONENTS

[Capture](#)

[Document Management](#)



## GIFT AGREEMENT MANAGEMENT

As the result of multi-year, institution-wide fundraising campaigns, campuses are seeing a dramatic rise in donor interest to make major gifts. This means institutions need to prepare for an increasing volume of gift agreement documents. OnBase provides a central repository to process agreements while seamlessly integrating with fundraising software systems.

Via a custom-built eform, OnBase captures required information from the gift agreement and submits it to the gift agreement preparation team. The completed form is automatically routed via workflow to gift agreement officers, who no longer have to spend time tracking down missing information regarding donors' gift intentions and plans. With OnBase, key officers throughout the institution – including legal, academic and administrative leadership – easily ensure that agreements are presentation-ready for donors' final approval. Contracts are also automatically stored in the donor record, keeping the donor history up-to-date.

### BENEFITS

- ✓ Provides a comprehensive view of all contract requests in a process
- ✓ Automates process workflows with notifications that remind staff of upcoming delivery dates
- ✓ Ensures that all information surrounding a gift can be accessed only by those who are authorized to see it

### CORE COMPONENTS

[Business Process Automation](#)

[Capture](#)

[Enterprise File Sync and Share](#)

[Integration](#)

[Reporting](#)



# GIFT PROCESSING

Advancement and Development offices are constantly working to raise funds across various programs, departments and institutional initiatives. But relying on slow, manual, paper-based processing can produce negative effects campus-wide. Even with the deployment of caging or lockbox functionality to speed gift processing and manage transaction volume, staff still need a comprehensive, digital view of the donor record to optimize fundraising goals and donor relations.

With OnBase, advancement offices automate the receipt, processing and instant retrieval of gifts and related documentation to drive efficient collection, matching and routing tasks. In addition, OnBase automatically checks for prospect matches, open pledges, gift amount thresholds and allocation designations, ensuring you don't miss any opportunities. With preconfigured business rules built into the process workflow, OnBase takes action – creating new records, if need be – routing items for further review or research before sending notifications to program directors, VPs and other stakeholders. OnBase can also create “thank you” letters and other correspondence, automatically updating the donor records in your ERP, CRM or donor management system – creating more time for staff members to cultivate relationships with donors and prospects. And, by seamlessly integrating with your advancement CRM, you extend the functionality in your current investment to transform gift processing.

## BENEFITS

- ✓ Extends the functionality of your advancement CRM, enabling electronic management of all gift payments and related documents for optimized efficiency
- ✓ Empowers staff to focus on fundraising and donor relations by eliminating manual, back-office tasks
- ✓ Provides full control over donor anonymity and privacy with redaction and permission-based viewing

## CORE COMPONENTS

[Business Process Automation](#)

[Capture](#)

[Document Management](#)

[Enterprise File Sync and Share](#)

[Integration](#)

[Reporting](#)



# DONOR CORRESPONDENCE MANAGEMENT

When communicating with current or prospective donors, it is important that all staff who interact with these constituents have access to current and accurate information.

With OnBase, track all email, phone, fax and letter correspondence between constituents and the institution. Assign correspondence to the appropriate people in various departments across campus, from advancement to athletics, for review. Track the status of each piece of correspondence as reviewers add notes, follow-up on necessary items and secure funding for projects.

## BENEFITS

- ✓ Tracks and monitors the status of all correspondence in one system
- ✓ Allows you to assign follow-up tasks quickly
- ✓ Ensures that employees complete all tasks with automated notifications and reminders
- ✓ Provides staff consistent access to current and accurate information, allowing for seamless discussions with current and potential donors to secure funding

## CORE COMPONENTS

[Business Process Automation](#)



# PHYSICAL RECORDS MANAGEMENT

OnBase enables organizations to track, locate and request physical records electronically. Manage physical records alongside electronic documents and records, using OnBase as the single interface – regardless of record location or format. Enforce uniform retention policies across both physical storage facilities and electronic repositories and extend compliance initiatives into physical record business practices. With OnBase, institutions rapidly discover and locate physical record information as it relates to electronic content and increase accountability by tracking the chain of custody through an auditable access history.

## BENEFITS

- ✓ Simplifies compliance efforts institution-wide by ensuring records are securely organized, easily discoverable and destroyed at the appropriate time
- ✓ Provides increased visibility for records managers
- ✓ Increases accountability through an auditable access history

## CORE COMPONENTS

[Case Management](#)

[Document Management](#)



# PRESIDENT MEETING/EVENT REQUEST

Track and assign all presidential meeting and event requests that enter the President's office via email, phone, fax and letter correspondence. Assign follow up correspondence to the appropriate people and integrate with calendaring applications such as Microsoft Outlook.

## BENEFITS

- ✓ Tracks and monitors all meeting requests in one system
- ✓ Allows you to assign follow-up tasks quickly
- ✓ Ensures that employees complete all tasks with automated notifications and reminders

## CORE COMPONENTS

[Business Process Automation](#)





## ATHLETIC ACADEMIC ELIGIBILITY TRACKING

Athletic departments must regularly review student-athletes' academic performance to ensure compliance with relevant NCAA (or other) regulations. This review requires input from staff, faculty and systems from all over campus and is often a time-consuming, disjointed process that unnecessarily burdens your compliance team.

OnBase helps streamline ongoing athletic eligibility tracking by integrating with key systems to display the data needed to certify eligibility. In addition, the system automatically routes student-athlete records to all appropriate reviewers, freeing up advising and athletic department staff to support student-athletes instead of tracking down data.

### BENEFITS

- ✓ Reduces risk of potential errors and compliance violations
- ✓ Creates a single view into student-athlete data required to certify eligibility
- ✓ Flags at-risk students for follow-up
- ✓ Automates the review process by electronically routing student-athlete records and supporting documents

### CORE COMPONENTS

[Business Process Automation](#)

[Case Management](#)

[Integration](#)

[Reporting](#)



## ATHLETICS FORMS PROCESSING

From medical and insurance forms to NCAA compliance documentation, student athletes have a pile of paperwork to complete each season. It takes a great deal of valuable time for your administrators, coaches and athletes to keep track of required forms and ensure each one is signed and completed correctly.

OnBase allows your athletes to complete required forms electronically, even before their first day at training. In OnBase, administrators easily track form completion and identify missing requirements. Forms with associated review processes automatically route to the appropriate person, then to a digital folder dedicated to each athlete, sport and season. With OnBase, coaches and support staff spend more time working with athletes and less time tracking down paper.

### BENEFITS

- ✓ Helps ensure compliance for relevant regulations
- ✓ Reduces time spent tracking down missing forms or information
- ✓ Automates routing of electronic forms for review
- ✓ Integrates with student information and student-athlete CRM's

### CORE COMPONENTS

[Business Process Automation](#)

[Capture](#)

[Document Management](#)



## POLICY ACKNOWLEDGEMENTS

OnBase allows athletic department administrators to create, distribute and track acknowledgement of policies and procedures while reducing associated administrative tasks such as filing, copying and mailing documents. Streamline policy creation and approval by automatically tracking all updates and revisions.

With an easy-to-use interface, athletic department staff quickly send email notifications containing links to policies in OnBase to the appropriate group. By distributing documents electronically, OnBase eliminates the need to manually distribute multiple paper-based copies. By storing all policy documents, training videos and other supporting content in OnBase, you improve access to crucial information, facilitating easy acknowledgement and review.

Through a variety of secure access options – including a web browser, online portal, existing business application or even a stand-alone kiosk – employees and student athletes log into OnBase to view all policy-related content. OnBase supports both internal and external compliance initiatives by automatically tracking employee acknowledgement and identifying any delinquencies.

OnBase also provides reports that clearly detail who has acknowledged policies and who hasn't. When staff discover exceptions, they easily notify individuals of noncompliance and resolve any issues before an external audit. Overall, with documented proof of both policy distribution and employee sign-off, your athletics department strengthens compliance and minimizes liability while holding staff and student athletes accountable.

### BENEFITS

- ✓ Streamlines policy creation, approval and distribution
- ✓ Improves employee access to documents for review
- ✓ Supports compliance initiatives by tracking acknowledgments
- ✓ Provides visibility into who/who has not acknowledged policies
- ✓ Sends automatic notifications when a policy has not been acknowledged

### CORE COMPONENTS

[Business Process Automation](#)

[Document Management](#)

[Reporting](#)



## RED SHIRT APPLICATIONS

When a student-athlete doesn't compete in their sport for an entire season, your institution may need to track and review the student's eligibility to comply with governing bodies. This process is often decentralized by sport and largely paper-based, making it difficult to manage.

OnBase forms and business process automation tools improves the redshirt application process. Student-athletes or staff submit an application and OnBase automatically routes the form to appropriate reviewers. Upon completion, OnBase archives the request for future retrieval and compliance reporting.

### BENEFITS

- ✓ Provides a consistent electronic form to gather redshirt student-athlete information
- ✓ Automates the approval process and engage the appropriate stakeholders
- ✓ Supports compliance efforts with simple search and reporting functionality

### CORE COMPONENTS

[Business Process Automation](#)



## ROSTER MANAGEMENT

With each team managing their own lists in spreadsheets or on paper, roster management for your sports teams is cumbersome and decentralized. Administrators often have to dig for information to keep student-athlete records up to date and maintain league compliance.

Manage your student roster with OnBase forms and business process automation tools. Coaches and sports administrators submit electronic forms to add or remove a student-athlete from a squad list. If needed, the form automatically routes to the appropriate reviewer. The system immediately updates the student-athlete record in OnBase to provide a complete picture for advising and support. Even better, OnBase links to your student information system and athlete CRM to ensure the most up-to-date information possible.

### BENEFITS

- ✓ Provides a single, reliable source for your team rosters
- ✓ Streamlines the approval and review process for adding and removing team members
- ✓ Easily provides audit information for governing bodies

### CORE COMPONENTS

[Business Process Automation](#)

[Case Management](#)



# SPORTS MEDICINE DOCUMENT MANAGEMENT

By equipping personnel with secure, instant access to information, OnBase enables sports medicine departments to better manage student-athlete files. OnBase stores student-athlete medical documents electronically in one central location, reducing the time spent searching for content while increasing security and supporting compliance initiatives.

Whether documents come in via manual scanning, fax or email, OnBase automatically builds a digital folder for each student-athlete – creating an organized, singular view into required documentation. In addition, the solution flags any missing required documents to ensure compliance and, if needed, automatically sends submitted documents for review and follow-up. Finally, OnBase links medical documents to the student-athlete record, providing authorized staff with a single interface to access key student-athlete medical information.

## BENEFITS

- ✓ Streamlines management of student-athlete medical files
- ✓ Supports compliance initiatives
- ✓ Ensures security of student-athlete data

## CORE COMPONENTS

[Capture](#)

[Document Management](#)



## STUDENT ATHLETE ADVISING

Supporting student-athletes comes with unique requirements for student success and compliance. Unfortunately, student-athlete information often exists in siloed systems while key, supporting interactions with staff and faculty exists on paper, if at all. With an increased focus on student-athlete success, it's more important than ever to ensure your advising team have the right tools in place to serve their specialized needs.

With OnBase, staff see a complete view of athlete information, supporting interactions and related documents. Manage and track study hall and tutor sessions as well as assigned counselors. Integrate with your student information or other key systems to ensure advisors have the most accurate, comprehensive view of student-athlete information.

### BENEFITS

- ✓ Provides a complete view of student-athlete information
- ✓ Integrates with Student Information and other relevant Systems
- ✓ Automates supporting processes, like tutor assignments and study hall tracking
- ✓ Provides secure access to related documentation, such as compliance forms and medical documents

### CORE COMPONENTS

[Business Process Automation](#)

[Case Management](#)

[Reporting](#)



## ATHLETIC HISTORICAL RECORDS MANAGEMENT

Athletic departments often rely on filing cabinets and massive storage spaces to store historical documents. Retrieving newspaper clippings, sporting event programs, pictures, etc. buried in storage is a time-consuming, frustrating task.

Leverage OnBase document management to preserve aging documents, programs, photos and more. Hyland's imaging services can even help with backfile scanning to make historical athletic files searchable, saving staff valuable time that would otherwise be spent sorting through paper files.

### BENEFITS

- ✓ Saves valuable time retrieving historical files
- ✓ Uses key metadata or full-text searching to quickly retrieve athletic media files
- ✓ Reclaims physical storage space

### CORE COMPONENTS

[Capture](#)

[Document Management](#)





## ATHLETE ACCOMMODATIONS

Leveraging case management, OnBase enables you to view athlete information and track any special accommodations for academics. Commonly tracked items include grades, study halls, community service, career development, scholarship requirements and advising touch points. OnBase archives related, supporting documentation and makes it easily accessible when needed for athletics compliance and historical record.

### CORE COMPONENTS

[Case Management](#)



## EQUIPMENT MANAGEMENT

Utilizing case management capabilities, OnBase provides simple but robust tracking systems for physical assets within Higher Ed institutions. Leveraging mobile technologies, it is easy to request and track inventory across campus. Examples include tracking athletics equipment, AV equipment, university vehicles, office furniture, classroom furniture or residence life assets.

### CORE COMPONENTS

[Business Process Automation](#)

[Case Management](#)



## STUDENT RECOGNITION AND AWARDS

Using a simple electronic form and request process, OnBase allows professors or peers to nominate students for awards, scholarships or other honors within the institution. Upon submission, forms route through a customized review process consisting of one or multiple reviewers, sending automated, necessary notifications along the way. OnBase then archives the nomination form and any supporting documentation for historical record.

### CORE COMPONENTS

[Business Process Automation](#)

[Capture](#)

[Document Management](#)



## FOOD WAIVERS

This solution facilitates the submission and corresponding approval process for food waivers. From a form posted on the Dining Services website or other portal, requestors may complete and submit a Food Waiver Request form. Submission of this form triggers the approval process workflow in OnBase. From there, the form routes to the appropriate Facility Manager, based on the requested event location, for approval.

Once approved, the form then routes to the Dining Services group for review, where they add comments and/or related documentation and send it on to Campus Services for final review. Upon final approval decision of the request, or if the request is denied at any point in the process, OnBase notifies the requestor of the decision by email.

### BENEFITS

- ✓ Reduces time and errors associated with manual routing
- ✓ Notifies requestor of decisions made throughout the process
- ✓ Provides easy access to forms via a portal

### CORE COMPONENTS

[Business Process Automation](#)



## CAMPUS SAFETY TRACKING

Many institutions still utilize a paper ticketing system for processes surrounding parking and other violations distributed by campus safety professionals. This results in potential lost tickets, long, manual appeals processes, revenue loss and time spent entering data manually.

With OnBase, campus safety officers simply access a mobile form while out in the field and enter the vehicle license plate number. From there, OnBase auto fills the pertinent information about the permit holder, pulling from the student information system. Once the officer submits the ticket form, OnBase sends the permit holder an email notification with the ticket number, date and location of where the violation took place. At the same time, a workflow kicks off to bill the student for the ticket.

Should the student choose to appeal the ticket, an electronic form can be made available via a student portal where students simply enter the ticket number and reason for the appeal. Upon submission, OnBase notifies the director of campus safety. If a decision is made to waive all or part of the ticket, a workflow notifies billing (student accounts) to refund all or part of the ticket charge.

### BENEFITS

- ✓ Enables faster processing of ticket-related billing, resulting in quicker revenue collection
- ✓ Increases efficiency throughout the entire process, from ticketing to appeals to fund collection
- ✓ Integrates with the SIS to keep student records up to date
- ✓ Eliminates manual rekeying of data from paper tickets into the SIS to prepare for billing

### CORE COMPONENTS

[Case Management](#)



## DINING SERVICES

Using OnBase as a document repository, Dining Services organizations store food orders, invoices, food safety guidelines, student employment records and any other content used within the facility. With the power of workflow, the dining organization also manages digital business processes such as employee acknowledgements, approvals-to-pay and vendor ordering or correspondence.

### CORE COMPONENTS

[Business Process Automation](#)



## ACCOUNTS PAYABLE

In accounts payable (AP), invoices and related documents constantly arrive from different locations and in different formats, making the capture and organization of vital information a challenge. With OnBase, you electronically manage the documents and information that drive AP processes, allowing you to maximize the benefits of fast and accurate invoice processing.

By immediately imaging documents and making them available directly from enterprise resource planning (ERP) screens, employees no longer have to physically search for critical payment information. They quickly retrieve invoices, goods receipts, packing slips, check images, vendor contracts and even historical correspondence with a few mouse-clicks. Workflows automatically route documents and information to appropriate business units, perform two- or three-way matching and post to accounting applications – notifying stakeholders along the way. By eliminating the need for business users to re-key information, you minimize the number of touches per transaction, reducing manual data entry while increasing AP process efficiency. As a result, you improve vendor relationships and have the ability to capture early-payment discounts.

### BENEFITS

- ✓ Reduces operating costs associated with paper-based processing
- ✓ Allows you to review and approve invoices directly from Microsoft Outlook or mobile devices
- ✓ Helps balance workload distribution with visibility into the real-time status of invoice processing

### CORE COMPONENTS

[Business Process Automation](#)

[Capture](#)

[Document Management](#)

[Integration](#)

[Reporting](#)



## GENERAL FILE MANAGEMENT

If you don't have a secure, central repository for student information, you're most likely spending too much time searching for information. And your data may be at risk of being breached. OnBase General File Management enables institutions to better manage student files, equipping personnel with secure, instant access to student information. The solution allows organizations to store documents electronically in one central location, reducing the time spent searching for information while increasing security and supporting compliance initiatives.

### BENEFITS

- ✓ Retrieve student documents and data without leaving your related line-of-business system
- ✓ With a centralized location for all documents, information can be accessed quickly
- ✓ Service levels improve with the ability to rapidly respond to student requests
- ✓ Data security is increased by placing all information in one electronic repository and enabling tight control over user access and permissions

### CORE COMPONENTS

[Document Management](#)





## STUDENT BILLING

Manual, paper-reliant processes slow down your staff and cause bottlenecks when issuing bills, generating reports, filing receipt documentation and updating the SIS or other financial system of record, making cash flow less than optimal. And without a convenient way to check the status of their accounts and pay bills, digitally-savvy students may be dissatisfied with your services.

OnBase for Student Billing enables institutions to quickly and easily implement a streamlined, service-oriented approach to student billing that speeds turnaround for payment collection and processing, reduces bill-to-payment overhead and increases cash flow. The solution automatically routes files, indexes individual transactions for processing and review, and attaches billing statements to student records within your ERP. A self-service portal puts account status information and bill pay capabilities at students' fingertips. And with better visibility into documentation, staff members can easily and accurately answer questions.

### BENEFITS

- ✓ Students can access account information themselves, reducing phone calls by 50% or more
- ✓ Billing offices easily resolve issues with online access to financial aid documents
- ✓ Past due accounts receive automatic follow-up emails with invoice attachments
- ✓ Follow-up phone calls for outstanding invoices are automatically prioritized
- ✓ Original invoices sent to students and/or parents are auto-captured and available for reference

### CORE COMPONENTS

[Business Process Automation](#)



## CONTRACT MANAGEMENT

Take control of your contract management process while mitigating risk across your institution. OnBase manages the entire contract lifecycle from initial request and final approval to expiration dates and renewals. By automating predictable steps, OnBase provides personnel with the information they need to make better recommendations and drive work forward.

OnBase automatically routes contracts for review, approval and execution – including capturing digital signatures. And, with automatic notifications, you won't miss a pending expiration or an auto-renewal. With OnBase, legal personnel have a complete view of all contract-related information, from the contracts themselves to supporting data and documents. At the same time, improved information access across the institution keeps employees apprised of key contract details to facilitate collaboration. OnBase offers a full audit trail, including a history of interactions (with supporting data) for a clear, comprehensive view of current work and upcoming obligations to support compliance. OnBase contract management solutions scale to support a variety of contract types, too, including vendor contracts, employment agreements and NDAs as well as their related processes, creating a lower cost of ownership and driving value across your entire institution.

### BENEFITS

- ✓ Provides managers and legal departments with full visibility into the contract process
- ✓ Manages the entire contract lifecycle from request to approval to expiration and renewal
- ✓ Automates notifications to avoid missed deadlines and ensure compliance
- ✓ Maximizes existing investments by linking contracts to other systems of record
- ✓ Minimizes delays with remote and mobile access to contracts and approval tasks

### CORE COMPONENTS

[Business Process Automation](#)

[Case Management](#)

[Capture](#)



## ACCOUNTS RECEIVABLE

Manual accounts receivable (AR) processes waste time, delay deposits and prevent visibility into your institution's cash flow. Automate the manual parts of AR with OnBase for instant access to relevant data and documents. Minimize operational costs while increasing visibility into cash flow, improving accuracy and accelerating payment application.

By capturing information directly from remittance statements, checks and other related documents and sharing it across campus, OnBase improves payment processing to significantly decrease days sales outstanding. Automatically processing your documents and files means your institution no longer needs to add staff during peak processing times and AR employees may be reallocated to perform higher-value tasks.

### BENEFITS

- ✓ Accelerates and improves payment processing significantly reducing days sales outstanding
- ✓ Increases visibility into AR process and cash flow
- ✓ Captures information directly from statements to eliminate tedious and error-prone manual data entry

### CORE COMPONENTS

[Business Process Automation](#)

[Capture](#)

[Integration](#)

[Reporting](#)



## FINANCIAL CLOSE PROCESS

In many accounting departments, the end of the month means hurried employees tracking down data, pleading for analysis and pouring over spreadsheets to close the books on time. But, it doesn't have to be that way. With the OnBase financial close solution it is possible to optimize your month-end financial close to increase visibility, automate employee tasks and decrease costs.

With OnBase, documents and information are captured electronically and made easily accessible in a central location. By reducing manual tasks you increase the speed and accuracy of the financial close, ensuring all close-related work is complete on time or ahead of schedule. No more relying on spreadsheets to manage close checklists, employees searching for supporting documents and using email for collaboration. Instead, employees are presented with assigned activities for each month, quarter or annual reporting cycle – along with all of the necessary documentation to make better, more informed decisions. And the faster close-related tasks are completed, the faster the review, giving you more opportunity to make necessary adjustments or decisions.

### BENEFITS

- ✓ Ensures no close-related steps are missed and all tasks are completed on time or ahead of schedule
- ✓ Accelerates financial close giving you more time to make informed decisions that enable business agility and support strategic planning
- ✓ Eliminates the need for overtime and temporary staff and improves overall employee satisfaction
- ✓ Supports audit and compliance efforts

### CORE COMPONENTS

[Business Process Automation](#)



## INVOICE PROCESSING

Manually processing invoices is time-consuming, error-prone and costly. Automating invoice processing improves data accuracy, ensures timely payments, and enhances accounts payable (AP) productivity and transparency.

No matter where invoices arriving at your institution originate from, OnBase captures them at the source and sends them to one, central location for processing. Regardless of invoice format – mail, fax, email, EDI, etc. – OnBase extracts relevant data and delivers the invoice images and data directly to your accounting, enterprise resource planning (ERP) and content management systems. The data is validated using business rules, database lookups and sophisticated algorithms to ensure accuracy, speed the invoice cycle and remove the risks associated with manual data entry. This results in much faster invoice processing allowing you to resolve exceptions sooner, take advantage of more early payment discounts and handle an increasing number of invoices without the need for additional resources.

### BENEFITS

- ✓ Speeds invoice cycle time
- ✓ Automates manual tasks allowing you to reallocate staff to higher-value tasks
- ✓ Helps you improve vendor relations and capture more early payment discounts
- ✓ Keeps costs down over time by scaling to meet increasing invoice volumes

### CORE COMPONENTS

[Business Process Automation](#)

[Capture](#)

[Document Management](#)

[Integration](#)

[Reporting](#)



## PROCUREMENT & PURCHASING

Eliminate manual tasks and paper-based purchase requisitions that can slow the purchasing process and cause problems later for accounts payable. OnBase streamlines the purchasing process to reduce manual effort, save time and enhance collaboration internally and with vendors.

OnBase can route purchasing information to managers and your procurement team for approval, changes or denial, and even include charge code entry capabilities. Integration with enterprise resource planning (ERP) systems means all purchasing data can be automatically entered for creation of purchase orders. Electronic copies of all documents are stored in OnBase and can be accessed at any time directly from your ERP. This provides staff with instant access to the information they need – including price, quotations, invoices, proposals and more – without leaving their familiar application resulting in quicker, easier and more accurate purchasing.

### BENEFITS

- ✓ Speeds up the approval process by routing purchasing information for approval, changes or denial
- ✓ Increases the accuracy of information and purchasing cycle resulting in a more manageable invoice processing cycle
- ✓ Provides access to needed information directly from your ERP
- ✓ Facilitates easy collaboration with others in the process and easy vendor communications

### CORE COMPONENTS

[Business Process Automation](#)

[Integration](#)



## PURCHASING CARD REQUEST

Purchasing cards (p-cards) make the expense management process more efficient and improve the experience for employees on the road. But when a staff member returns from a trip, it is often a painful process to manually match each receipt and piece of paper with the lines on the p-card invoice. This labor-intensive process can delay employee reimbursement and hinder employee satisfaction.

Simplify your p-card process with OnBase. As each invoice arrives from the credit card company, OnBase parses each line item and stores them as keywords, making retrieval and reconciliation simple. When an employee returns from a trip, they simply fill out an easy-to-use electronic form with each vendor and purchase amount, and OnBase reconciles the form with the credit card statement. The form can even be auto-populated with personal information to further simplify the process for employees.

### BENEFITS

- ✓ Reduces manual effort and improves employee service, ensuring reimbursements are paid in a timely manner
- ✓ Offers responsive forms that can be accessed via any mobile device for convenience
- ✓ Eliminates the need to keep and manage paperwork and faded receipts



## REQUISITION PROCESSING

OnBase speeds up and streamlines the purchasing process, while also helping to improve purchasing controls. It stores and manages information electronically in one, centralized and secure database. Since OnBase integrates with ERP systems – including SAP®, PeopleSoft®, Infor Lawson, Oracle, JD Edwards and Microsoft Dynamics – users have access to the information they need to make informed purchasing decisions from the familiar applications they work in every day. OnBase makes it easy to route purchasing information to managers and the procurement team for approval, changes or denial, and even includes charge code entry capabilities. Business rules and a complete audit trail ensure proper approval processes are followed for all purchases.

### BENEFITS

- ✓ Automates the routing of purchasing information for approval, saving time and eliminating manual effort
- ✓ Utilizes well-defined, consistent processes to ensure compliance
- ✓ Provides access to information directly from your ERP

### CORE COMPONENTS

[Business Process Automation](#)





## TRAVEL & EXPENSE REIMBURSEMENT

Submitting and reviewing travel authorizations and reimbursement requests can be a source of frustration for employees. In Higher Education, the process may involve additional steps for travel related to special programs, such as Grants and Research.

OnBase helps manage and automate this process using a streamlined workflow process and easy-to-use, configurable forms. The solution automatically creates reimbursement forms when travel has been approved, saving the submitter time and reducing discrepancies. OnBase also allows submitters to access and complete reimbursement forms over time, enabling them to finish and send for review when ready. Related documents (e.g., receipts, travel confirmation) are tracked alongside the request, simplifying the review process with a single view to expedite reimbursements.

### BENEFITS

- ✓ Automates routing of electronic reimbursement forms to the appropriate staff
- ✓ Saves the submitter time by creating reimbursement forms automatically upon travel approval
- ✓ Stores reimbursement forms with related documents (receipts, travel forms, etc.) to expedite review and approval

### CORE COMPONENTS

[Business Process Automation](#)



## VENDOR MANAGEMENT

Tracking hundreds or even thousands of vendor relationships can be difficult when vendor information is managed in scattered, disparate locations. OnBase improves vendor management processes, allowing you to maintain more productive, beneficial vendor relationships, mitigate risk and better manage vendor-related content.

OnBase allows accounting, procurement and other personnel to interact with vendor-specific information, compliance documents, contract details and correspondence in one central location. It formalizes the vendor request process and sourcing process to improve onboarding and ensure the right data and documents are collected up front. With OnBase, authorized personnel access and interact with all vendor information through the entire relationship without switching between applications. A complete vendor management solution, it helps you maximize relationships and make better purchasing decisions by monitoring issues and reporting on vendor compliance.

### BENEFITS

- ✓ Eliminates information silos with secure, central access to vendor information and critical supporting content
- ✓ Formalizes the request and sourcing process, increasing efficiency and accountability
- ✓ Increases visibility into vendor relationships, improving decision-making
- ✓ Accelerates vendor-related processes with easy access to information and documents
- ✓ Saves time by eliminating the need to switch between applications to find vendor information

### CORE COMPONENTS

[Case Management](#)

[Integration](#)



## TRAVEL & EXPENSE PREAUTHORIZATION AND REIMBURSEMENT

Submitting and reviewing travel authorizations and reimbursement requests can be a source of frustration for employees and administrative staff. In higher education, the process may be even more cumbersome when travel related to grants and research involves additional steps.

OnBase helps manage and automate these processes via streamlined workflow and easy-to-use, configurable forms. From the initial request to travel, forms automatically route to the appropriate department for review. Once travel is approved, OnBase automatically creates reimbursement forms – saving the submitter time and reducing discrepancies. Submitters can access the reimbursement forms over time, then complete and send for review when ready. The solution tracks related documents alongside requests, such as receipts and travel confirmation, simplifying the review process with a single view of all the information required to make decisions.

### BENEFITS

- ✓ Ensures completion of all required information prior to submission of travel authorization and reimbursement requests with electronic forms
- ✓ Reminds travelers via automatic notifications to complete their reimbursement forms at the end of their trips
- ✓ Streamlines the review process for approvers and administrators with a simple, consolidated view of requests and supporting documents
- ✓ Ensures all of the appropriate individuals approve an expense prior to reimbursement with automated review processes

### CORE COMPONENTS

[Business Process Automation](#)



## TUITION REMISSION

Tuition remission is an important benefit for your institution's employees and their dependents. But determining eligibility, gathering the right documentation and getting approvers to review and sign off is a labor intensive process if your organization is still using manual processes or disparate systems.

OnBase simplifies the tuition remission process by enabling requestors to easily provide required information and documentation to managers, HR representatives and other approvers who can seamlessly review and verify their requests. And once approved, your institution's finance office is automatically notified that a tuition reimbursement has been authorized.

### **BENEFITS**

- ✓ Documentation, like course descriptions and transcripts, can be easily uploaded by requestors
- ✓ Requestors can see the status of their tuition remission requests, reducing the time spent by staff answering inquiries
- ✓ All approvers can review and verify eligibility from one single interface
- ✓ Your institution's finance, payables or bursar's office has visibility into reimbursement approval status

### **CORE COMPONENTS**

[Business Process Automation](#)



## ADMISSIONS PROCESSING AND REVIEW

When your goal is to admit the best-fit applicants, speed is key. The faster an applicant receives an acceptance letter, the sooner your school becomes a real option – and the more likely that applicant is to accept. Accelerate the admissions process by removing the hassle of paper and eliminating delays to send decisions to best-fit applicants faster than the competition.

With OnBase, Admissions offices automate the capture and routing of applications for quicker, more accurate decisions. As documents import to the system, OnBase automatically indexes them using information from your Student Information System (SIS). At the same time, OnBase updates the SIS checklist, reducing (perhaps eliminating) any manual data entry. Completed applications move immediately to the appropriate counselor's review queue electronically. And, with a secure online access point, counselors can review files while in or away from the office. OnBase also provides enhanced visibility into the applicant pool, segmenting it by key demographics – such as targeted states or regions, CEEB codes, ethnicity, etc. – all of which allows you to shape the class as it is forming.

### BENEFITS

- ✓ Automates generation and capture of decision letters
- ✓ Sends automatic communications to prospective students throughout the process to keep them informed
- ✓ Automates document matching, checklisting, file completion and routing to counselors for review
- ✓ Enables access to admissions documents directly from your SIS, including PeopleSoft, Banner, Colleague, Jenzabar and homegrown applications

### CORE COMPONENTS

[Business Process Automation](#)

[Capture](#)

[Document Management](#)

[Enterprise File Sync and Share](#)

[Integration](#)

[Reporting](#)



## CONSORTIUM/STUDY ABROAD PROCESSING

Simplify the process for students to submit foreign coursework for degree requirements. OnBase streamlines the application process with electronic forms and automated workflows. Students can start an application, come back to it later and submit it when it's complete. Students also have the ability to submit documents and supporting information to request using their foreign coursework to fulfill local degree requirements. OnBase routes these applications to the appropriate reviewers based on degree requirements, program or major.

### BENEFITS

- ✓ Improves service to students who apply to and participate in study-abroad programs by providing a clear path to degree completion
- ✓ Allows students to complete applications over time, rather than in one sitting
- ✓ Automates reminder notifications to reviewers with pending work
- ✓ Reports on foreign courses to update the course equivalency database in your SIS

### CORE COMPONENTS

[Business Process Automation](#)



## GRADUATE ADMISSIONS PROCESSING AND REVIEW

When your goal is to admit the best-fit applicants, speed is key. The faster an applicant receives an acceptance letter, the sooner your school becomes a real option – and the more likely the applicant is to accept. Accelerate the admissions process by removing the hassle of paper and eliminating delays – enabling you to send decisions to best-fit applicants faster than the competition.

With OnBase, Admissions offices automate the capture and routing of applications for quicker, more accurate decisions. As documents are imported into the system, OnBase automatically indexes them with information from your student information system (SIS) while updating its checklist, reducing or eliminating manual data entry. Completed applications move immediately to the appropriate counselors electronically. And, with a secure online access point, counselors can review files at the office or while away. OnBase also provides enhanced visibility into the applicant pool, dividing it by key target demographics – such as targeted states or regions, CEEB codes, ethnicity, and so forth – allowing you to view and shape the class as it is forming.

### BENEFITS

- ✓ Automates generation and capture of decision letters
- ✓ Sends automatic communications to prospective students throughout the process to keep them informed
- ✓ Automates document matching, checklisting, file completion and routing to counselors for review
- ✓ Provides access to admissions documents directly from your SIS, including PeopleSoft, Banner, Colleague, Jenzabar and homegrown applications

### CORE COMPONENTS

[Business Process Automation](#)

[Capture](#)

[Document Management](#)

[Integration](#)

[Reporting](#)



## MOBILE PROSPECT CARDS

When recruiters are on the go at college fairs or high school visits, collecting student information on paper and manually transferring it to a database consumes valuable time and resources.

With OnBase, institutions no longer need to hand key student information into their SIS or recruitment system. The mobile prospect card solution enables students to fill out information in an online form anywhere, anytime, via a mobile device or tablet – whether connected to a network or not. Accessed via ShortURL or QR Code, once the form submitted it becomes available to upload directly into the prospecting system – either real-time or batch load – eliminating the need for manual data entry.

### BENEFITS

- ✓ Provides access to information, documents and forms while off network
- ✓ Accessible via modern platforms such as tablets and phones
- ✓ Enables instant, anywhere, anytime access to critical business information
- ✓ Eliminates manual data entry

### CORE COMPONENTS

[Business Process Automation](#)

[Capture](#)

[Document Management](#)





## MAILROOM AUTOMATION

Mailrooms must manage a variety of distribution channels, both inbound and outbound. OnBase provides the ability to turn complex inbound document sorting and distribution into efficient, automated processes.

By partnering with premier hardware providers, OnBase offers a seamless solution for the capture, digitization, classification and distribution of incoming mail. Manage both paper and electronic mail through a similar process to standardize internal procedures for distribution. Leveraging OnBase, documents and information received via mail reach their final destinations faster, allowing institutions to execute business processes, and ultimately, business decisions, in less time.

### BENEFITS

- ✓ Streamlines a complex inbound document system into an efficient process
- ✓ Manages paper and electronic mail
- ✓ Standardizes internal procedures
- ✓ Enables quicker businesses decisions, resulting in monetary savings

### CORE COMPONENTS

[Capture](#)



## FINANCIAL AID VERIFICATION

Financial aid offices are facing a rising number of applicants and greater pressure to secure best-fit students, but with less staff and reduced budgets. OnBase helps you eliminate overburdened processes to ease verification, get packages out faster and remain compliant. You also improve the speed and quality of customer service, helping to ensure that students register for classes on time.

With OnBase, processors scan paper documents or students upload files securely online and OnBase indexes the information with key verification data. As verification documents come in, OnBase automatically updates the checklist in your student information system (SIS) or financial aid system. With updated checklists in the SIS, it's easy to answer student/parent questions about what documents have been received and which are still due. If your SIS includes portal functionality, students can view status checklists of received and outstanding documents directly in the portal at any time. By providing students with an easy, self-serve option, you help reduce the number of calls that come into your financial aid office.

Once all verification documents are received, OnBase automatically routes the student's record for review. In a side-by-side comparison, view the ISIR data from the SIS alongside the corresponding captured data from the verification documents and alert users when individual fields do not have equal data. This allows advisors to assess the situation, make necessary changes in the SIS and leverage SIS functionality to report changes for compliance.

### BENEFITS

- ✓ Captures data to compare to ISIR information
- ✓ Streamlines the collection of verification documents
- ✓ Sends award letters out faster to secure best-fit students
- ✓ Increases visibility so applicant questions can be answered on the first call

### CORE COMPONENTS

[Business Process Automation](#)

[Capture](#)

[Document Management](#)

[Enterprise File Sync and Share](#)

[Integration](#)

[Reporting](#)



# GRADE CHANGE FORMS

Grade changes often require paper forms that staff manually walk from office to office for signatures – a slow and error-prone process. Automate the grade change submission and review process with OnBase forms and workflow.

Instructors access a link from the faculty's intranet to submit a grade change request. OnBase automatically routes the form to the appropriate Dean for approval, then to the Registrar's office for review and entry into the student information system. Users easily track the status of a request and retrieve historical information on previously submitted forms.

### BENEFITS

- ✓ Simplifies the process for faculty with a convenient and easily-accessible grade change form
- ✓ Automates electronic submission of forms between faculty, deans and Registrar staff
- ✓ Provides reportable data to audit grade change requests and the instructors requesting them

### CORE COMPONENTS

[Business Process Automation](#)



## PETITION TO GRADUATE

Paper-based forms and approvals significantly slow down the petition to graduate process, resulting in a poor student experience. Not only does paper require manual review and routing, but incomplete or incorrect forms result in manual follow-up efforts.

OnBase streamlines the form submission and approval process to minimize or even eliminate delays. By using an electronic form to capture graduation and certificate requests, you ensure the information you receive is accurate and complete prior to submission. With an electronic routing process, approvals are expedient, reducing overall processing from weeks to hours. And, with automatic notifications sent to students throughout the process, submitters are kept up-to-date on the status of petitions, ultimately improving student service.

### BENEFITS

- ✓ Easily identify and remove duplicate petitions
- ✓ Automatically notify students throughout the process about the status of their petitions
- ✓ Minimize or eliminate inaccurate form submission utilizing electronic form data verification
- ✓ Gain a real-time view of students who have petitioned and easily identify those who should have petitioned but haven't yet
- ✓ Integrate with your student information system to automatically prepopulate student data in electronic forms upon launch

### CORE FUNCTIONALITY

[Business Process Automation](#)



## PROFESSIONAL JUDGEMENT APPEALS

When a school denies a student financial aid, he must submit a separate application in order to receive special consideration for assistance. Taking into account expected family contribution and the federal methodology of calculating financial aid, OnBase helps institutions provide students with a simpler way to appeal their financial aid packages.

With OnBase, students fill out professional judgement applications electronically via an online form. Automated workflows route applications to the necessary parties for review, allowing institutions to quickly process professional judgement appeal paperwork. Students also gain increased visibility into the status of their applications, so they no longer wait weeks to find out whether the institution has approved or denied their appeal requests.

### BENEFITS

- ✓ Increases process visibility to address individual student needs immediately and with ease
- ✓ Eliminates manual, paper-based processes and minimizes the possibility of misplacing information
- ✓ Integrates with student information systems allowing faculty and staff to access required documents with the click of a button
- ✓ Automatically alerts staff to missing documents or information
- ✓ Creates a built in audit trail for financial aid annual audits

### CORE FUNCTIONALITY

[Business Process Automation](#)



## LEAVE OF ABSENCE

When a student plans a leave of absence (LOA) from an institution, several departments must become involved. From Financial Aid and the Registrar's office to the Bursar's office and Academic Advising, OnBase provides a dynamic solution that accommodates individual circumstances – something that is vital for students planning a LOA, since each situation is unique.

With electronic documents and automated process tools, OnBase enables institutions to quickly process permanent withdrawal paperwork and automatically route documents to the correct destination. The solution automatically notifies all necessary parties of the student's leave, then schedules the process to reverse upon the specified return date. And by integrating with your SIS, faculty and staff access all the information they need to serve students with the click of a button, meaning applicant questions can be answered in minutes, not days. In addition, OnBase integrates with electronic signature tools, adding to gained speed and security in the LOA process.

### BENEFITS

- ✓ Features dynamic forms for paperwork customization and supporting document attachment
- ✓ Integrates with student information systems to inform faculty and staff of the change in enrollment status
- ✓ Automatically schedules a date or return to reverse the leave of absence holding
- ✓ Increases process visibility, so applicant questions are answered on the first call
- ✓ Eliminates paper-based processes by integrating an electronic signature tool

### CORE FUNCTIONALITY

[Business Process Automation](#)

[Capture](#)



## PERMANENT WITHDRAWAL

When a student decides to permanently withdraw from an institution, several departments must become involved. From Financial Aid and the Registrar's office to the Bursar's office and Academic Advising, OnBase provides a dynamic solution that accommodates individual circumstances – something that is vital for students undergoing a permanent withdrawal.

With electronic documents and automated process tools, OnBase enables institutions to quickly process permanent withdrawal paperwork and automatically route documents to the correct destination. And by integrating with your SIS, faculty and staff access all the information they need to serve students with the click of a button, meaning applicant questions can be answered in minutes, not days. In addition, OnBase integrates with electronic signature tools, adding to gained speed and security in the withdrawal process.

### BENEFITS

- ✓ Features dynamic forms for paperwork customization and supporting document attachment
- ✓ Integrates with student information systems, allowing faculty and staff to access required documents with the click of a button
- ✓ Automatically alerts staff to missing documents or information
- ✓ Increases process visibility, so applicant questions are answered on the first call
- ✓ Eliminates paper-based processes by integrating an electronic signature tool

### CORE FUNCTIONALITY

[Business Process Automation](#)



## ACADEMIC PETITIONS, SUBSTITUTIONS AND WAIVERS

The Registrar's office receives potentially hundreds of student request forms each week – from waivers and course substitutions to freshman privileges, course repeat requests and more. These forms are easily lost and often take a long time to process, and the subsequent review process tends to be inconsistent.

With OnBase, students complete requests online via a dynamically generated form, which updates based on the type of request they want to submit. OnBase ensures the student enters all required information before routing the form for review. The system automatically notifies all appropriate reviewers of outstanding requests, sending emails to advisors and faculty with a link to the form. From there, users can review and complete the form without logging into another system. When appropriate, reviewers simply return the form to the student for more information or request additional reviews. Additionally, students can opt to receive notifications of the progress throughout. Enrollment Services staff can monitor the progress and history of requests, making it easy to identify trends and increase accountability.

### BENEFITS

- ✓ Provides students with a single form for a variety of requests that dynamically updates with required information based on the request type
- ✓ Leverages data from the student information system, helping reduce manual data entry and errors
- ✓ Allows users to view and complete requests without logging into an OnBase client
- ✓ Routes forms automatically based on the type of request and student, but still allows flexibility when additional reviews are needed

### CORE FUNCTIONALITY

[Business Process Automation](#)





## REGISTRAR'S FORMS PROCESSING

Students increasingly expect fast response to campus requests, whether they need to drop or add a class, change majors and so forth. Delays and indecision easily frustrate today's students – meaning Registrar's offices that continue to rely on paper-based processes risk losing their ability to provide excellent student service.

With OnBase, the waiting game for students – and faculty – is over, as is the burden on Registrar processing staff. Forms submitted online remain in their electronic format throughout an automated and expedited routing and approval process. Tracking tools, including timers and notifications, keep forms moving through the process so that students get the answers they need when they need them. OnBase alleviates the burden on IT to support forms creation. With the intuitive forms design tools in OnBase, Registrar office staff easily create forms using any standard HTML editor or with native forms creation and editing capabilities.

### BENEFITS

- ✓ Provides seamless access to documents directly from your SIS, including PeopleSoft, Colleague, Banner, Power Campus, Jenzabar and homegrown applications
- ✓ Automates retention and deletion of all student records
- ✓ Process, route and approve student forms electronically, whether they are submitted online or via other self-service avenues
- ✓ Scrubs and transfers matriculated student files automatically, from Admissions to Registrar and departments to advisors

### CORE FUNCTIONALITY

[Business Process Automation](#)



## TRANSCRIPT CAPTURE

Speed transfer course evaluation by automating transcript capture and review. OnBase automatically reads data to capture course information and replace manual data entry. It then searches for existing course equivalencies in the institution's articulate database or third-party sites to find a match and prepare a comprehensive student record for degree audit. If no equivalency is found, OnBase routes the necessary information, per the institution's business process, to establish a new equivalency.

Whether decisions route to one reviewer or many, dependent on the course department or program, OnBase has the flexibility to support complexity for the best outcome of the student. Most important, the new equivalency rule writes back to the ERP or degree audit system and is available the next time a new transcript encounters that course.

### BENEFITS

- ✓ Automates transcript data capture and review to eliminate manual data entry
- ✓ Allows you to inform students sooner of how their courses fit into their chosen academic programs
- ✓ Updates the SIS automatically, reducing errors caused by manual data entry
- ✓ Reduce manual data entry by 50 percent while achieving accuracy rates that exceed 90 percent

### CORE FUNCTIONALITY

[Business Process Automation](#)

[Capture](#)

[Document Management](#)

[Integration](#)

[Reporting](#)



# TUITION REMISSION

Tuition remission is an important benefit for your institution's employees and their dependents. But determining eligibility, gathering the right documentation and getting approvers to review and sign off is a labor intensive process if your organization is still using manual processes or disparate systems.

OnBase simplifies the tuition remission process by enabling requestors to easily provide required information and documentation to managers, HR representatives and other approvers who can seamlessly review and verify their requests. And once approved, your institution's finance office is automatically notified that a tuition reimbursement has been authorized.

### BENEFITS

- ✓ Documentation, like course descriptions and transcripts, can be easily uploaded by requestors
- ✓ Requestors can see the status of their tuition remission requests, reducing the time spent by staff answering inquiries
- ✓ All approvers can review and verify eligibility from one single interface
- ✓ Your institution's finance, payables or bursar's office has visibility into reimbursement approval status

### CORE FUNCTIONALITY

[Business Process Automation](#)



## STUDENT ADVISING

Missing, inaccurate or stale information in outdated paper files prevents staff, counselors and faculty in Registrar's, program and faculty offices from consistently providing superior advising. Beyond the negative impact this has on student satisfaction and success, with funding decisions increasingly tied to retention and on-time graduation rates, it jeopardizes an institution's fiscal health.

OnBase arms those on the front lines of student service with the thorough, accurate and fully updated student information they need to provide effective student advising. With business process management tools to sort, filter and analyze student and advisor information, OnBase expedites the advisor-to-advisee matching process. OnBase automatically routes student files – or notifications about the availability of the files – to the appropriate advisor in advance of an advisee's initial advising session. As documents are no longer needed for downstream view (e.g., admissions application correspondence or review notes), OnBase purges them from the active file to create permanent student records. Take your solution a step further by running reports to identify at-risk students, volume of appointments and more. Plus, integrate with your SIS to ensure advising records are accessible as part of the holistic student record.

### BENEFITS

- ✓ Ensures that those serving the student have access to pertinent advising notes, enabling them to facilitate student success and satisfaction
- ✓ Integrates with the SIS to ensure advising records are accessible as part of the holistic student record
- ✓ Automatically routes student files and provides notifications to the appropriate advisor
- ✓ Helps identify and address student issues early on to facilitate on-time graduation rates

### CORE FUNCTIONALITY

[Case Management](#)

[Integration](#)

[Reporting](#)



## ALUMNI INTERVIEW MANAGEMENT

Engagement with alumni can be a very important aspect of the admissions review process, but facilitating and tracking alumni interviews can be cumbersome and disjointed. OnBase allows institutions to more effectively engage with alumni by facilitating the scheduling, review and recommendation process. OnBase automatically notifies alumni and prospective students to schedule an interview. The alumnus then accesses an electronic form to review the prospective student's application information, enter notes and provide a recommendation.

Admissions staff gain visibility into the status and history of this important component of the review process.

### BENEFITS

- ✓ Speeds the decision-making process for admissions review
- ✓ Enhances institution profile by engaging with alumni and ensuring the fit and integrity of prospective students
- ✓ Ensures interview complete in a timely manner by:
  - Offering external users access to OnBase forms and relevant applicant information to facilitate the interview process
  - Automatically routing interview notes and recommendations to the school for final review
  - Increasing visibility into the status of applications to reveal potential bottlenecks

### CORE FUNCTIONALITY

[Case Management](#)



## APPLICANT INTERVIEW MANAGEMENT

For institutions that utilize face-to-face interviewing with enrollment managers during the admissions process, OnBase helps to match and track the process. Analyzing the geographical territory of enrollment personnel and the hometown of prospective students, OnBase helps pairs individuals and sends prospects the necessary paperwork to complete the interview process. Results are then reported to OnBase, the prospective student's file is updated automatically and any missing information is reported to Admissions. This allows the enrollment team to focus on results management and streamline the decision making process.

### BENEFITS

- ✓ Matches enrollment managers with prospective students based on geographical territory
- ✓ Automatically updates student checklists based on interview results
- ✓ Routes results directly to student application file with the incorporation of exception reporting

### CORE FUNCTIONALITY

[Business Process Automation](#)



## AT-RISK STUDENT

The At-Risk Student solution allows institutions to identify and work with students that are potentially 'at risk' due to academic status, personal safety or other issues. Using OnBase, faculty and staff identify potential at-risk students then review their cases and OnBase routes case information to the appropriate person (RA, instructor, advisor, dean, campus police, etc.) to work with the student. OnBase facilitates the collection, routing and interaction with at-risk student data. The solution also provides administrators with reports to track outstanding issues and trends.

### BENEFITS

- ✓ Provides access to a variety of users and roles across campus to easily report on potential-at risk students
- ✓ Ensures issues are addressed efficiently and consistently with centralized, standardized processes
- ✓ Improves visibility into students' history of meetings, interactions, and counseling
- ✓ Improves response times to student needs, driving improved student satisfaction
- ✓ Increases efficiency around issue tracking and routing, allowing staff and faculty to focus on student needs, rather than administrative tasks

### CORE FUNCTIONALITY

[Case Management](#)

[Reporting](#)



## GRADUATION EXCEPTION PROCESSING

Graduation exception forms authorize the Registrar to satisfy requirements on the degree audit – something that is necessary to ensure that students complete their programs efficiently and effectively. When managed on paper, students often have to wait at length to have degree requirement exceptions approved and processed on their degree audits. And what's worse, forms are at risk of getting lost in interoffice mail, piling up on the dean's desk or being sent to the wrong approver or one that is absent, further delaying the process.

With OnBase, turnaround time can be hours or minutes rather than days or weeks. Electronic form processing means that lost exceptions are no longer possible. Forms automatically route to the appropriate approvers, and if an assigned approver is absent, forms route to an alternative approver to prevent delays in graduation. OnBase also integrates with the SIS to ensure that any staff member interfacing with the student can answer questions on the status of the exception – improving student service and satisfaction. Requests often originate from an institution's SIS self-service solution, eliminating much of the manual data entry for students and further simplifying the process for all involved.

### BENEFITS

- ✓ Prevents delays in exception processing with electronic forms and automated routing
- ✓ Speeds the approval of graduation exceptions on students' degree audits
- ✓ Eliminates redundant copies of exception forms across campus
- ✓ Ensures that lost exceptions are no longer possible

### CORE FUNCTIONALITY

[Business Process Automation](#)

[Capture](#)

[Integration](#)





## PHYSICAL RECORDS MANAGEMENT

OnBase enables organizations to track, locate and request physical records electronically. Manage physical records alongside electronic documents and records, using OnBase as the single interface – regardless of record location or format. Enforce uniform retention policies across both physical storage facilities and electronic repositories and extend compliance initiatives into physical record business practices. With OnBase, institutions rapidly discover and locate physical record information as it relates to electronic content and increase accountability by tracking the chain of custody through an auditable access history.

### BENEFITS

- ✓ Simplifies compliance efforts institution-wide by ensuring records are securely organized, easily discoverable and destroyed at the appropriate time
- ✓ Provides increased visibility for records managers
- ✓ Increases accountability through an auditable access history

### CORE COMPONENTS

[Case Management](#)

[Document Management](#)



## STUDENT JOB APPLICATION

The student job application process has many moving parts for hiring departments across campus. Often times each department has its own application form with unique requirements. Before conducting interviews, the HR department must collect accurate and complete information from each student applicant.

Leveraging electronic forms, OnBase facilitates application submission and offers features such as capturing student availability schedules and required supplemental documentation – like photo IDs or portfolios. Upon submission, applications route to hiring managers, allow staff to track interview scheduling and provide visibility into candidate pipeline. HR and hiring managers use OnBase to easily manage approvals and assign rejected candidates to the reconsideration pool. In addition, OnBase automatically notifies the hiring supervisor, HR department and applicant of status changes throughout the hiring process.

### BENEFITS

- ✓ Updates applicants upon any changes in application status with automatic notifications
- ✓ Tracks application and job history to support financial aid requirements for students
- ✓ Integrates with job portal to capture Job ID and other relevant information
- ✓ Integrates with Microsoft Outlook to handle interview schedules and approvals

### CORE FUNCTIONALITY

[Business Process Automation](#)

[Capture](#)



## TRANSCRIPT CAPTURE

Speed transfer course evaluation by automating transcript capture and review. OnBase automatically reads data to capture course information and replace manual data entry. It then searches for existing course equivalencies in the institution's articulate database or third-party sites to find a match and prepare a comprehensive student record for degree audit. If no equivalency is found, OnBase routes the necessary information, per the institution's business process, to establish a new equivalency.

Whether decisions route to one reviewer or many, dependent on the course department or program, OnBase has the flexibility to support complexity for the best outcome of the student. Most important, the new equivalency rule writes back to the ERP or degree audit system and is available the next time a new transcript encounters that course.

### BENEFITS

- ✓ Automates transcript data capture and review to eliminate manual data entry
- ✓ Allows you to inform students sooner of how their courses fit into their chosen academic programs
- ✓ Updates the SIS automatically, reducing errors caused by manual data entry
- ✓ Reduce manual data entry by 50 percent while achieving accuracy rates that exceed 90 percent

### CORE FUNCTIONALITY

[Business Process Automation](#)

[Capture](#)

[Document Management](#)

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## TRANSFER COURSE EVALUATION

After OnBase lifts coursework from a transcript, the Transfer Course Evaluation (TCE) solution automates the routing of transcript data for articulation review. Routing and matching of incoming courses, from both paper and electronic sources, occurs automatically. When an incoming course does not automatically match with the internal articulation database, OnBase presents the course to a user – on either the Registrar/Admissions team or a member of an academic area – with any possible matches via electronic form. In either scenario, the routing occurs automatically. Once a confirmed match exists, the articulation database updates so the next time this course enters the system it is recognized and articulated. The integration between OnBase and your articulation system is able to occur in real-time.

### BENEFITS

- ✓ Searches for course equivalencies already accepted by the institution automatically and pushes any matches to the student information system (SIS)
- ✓ Updates the SIS automatically, removing the error-prone manual data entry process
- ✓ Replaces slow, manual, paper-based processes that can cost you best-fit students

### CORE FUNCTIONALITY

[Business Process Automation](#)

[Capture](#)

[Document Management](#)

[Integration](#)

[Reporting](#)



## ELECTRONIC PLAN REVIEW

Automate your plan submission, review and certification process with OnBase. Improve staff collaboration and track plans throughout the review process to speed institutional development and infrastructure initiatives. Import plans and supporting documents directly into OnBase through a portal website. The website supports point-and-click configurable forms for intake of additional project information. Once imported, OnBase automatically organizes plan sets and documents to your standards. Workflow automation then routes that information to appropriate reviewers for simultaneous approvals.

After submitting plans, reviewers use OnBase to create and track changes and comments. OnBase organizes them by project, drawing, department and revision to ensure effective communication to the plan submitter. Reviewers have access to a standard comment list that users can organize by review type and department, giving reviewers a quick view of all of their standard checks. Once reviewed, OnBase provides the submitter with an organized list of the reviewers' comments and a marked-up plan set. OnBase also features a side-by-side comparison tool that overlays the plan revision with any previous revisions, allowing reviewers to see any required or unexpected changes. OnBase supports simultaneous access and mark-up capability, as well as the ability to refresh as needed to see the most current feedback from all reviewers, improving collaboration. Once the review process is complete, OnBase allows users to approve plans by applying an electronic stamp, seal and signature.

### BENEFITS

- ✓ Accelerates program and curriculum changes to facilitate a superior educational experience
- ✓ Streamlines communication to protect accreditation
- ✓ Automates notifications to ensure deadlines are met
- ✓ Eliminates paper-intensive submission, review and approval processes that cause delays

### CORE COMPONENTS

[Business Process Automation](#)

[Enterprise File Sync and Share](#)



## CONTRACT MANAGEMENT

Take control of your contract management process while mitigating risk across your institution. OnBase manages the entire contract lifecycle from initial request and final approval to expiration dates and renewals. By automating predictable steps, OnBase provides personnel with the information they need to make better recommendations and drive work forward.

OnBase automatically routes contracts for review, approval and execution – including capturing digital signatures. And, with automatic notifications, you won't miss a pending expiration or an auto-renewal. With OnBase, legal personnel have a complete view of all contract-related information, from the contracts themselves to supporting data and documents. At the same time, improved information access across the institution keeps employees apprised of key contract details to facilitate collaboration. OnBase offers a full audit trail, including a history of interactions (with supporting data) for a clear, comprehensive view of current work and upcoming obligations to support compliance. OnBase contract management solutions scale to support a variety of contract types, too, including vendor contracts, employment agreements and NDAs as well as their related processes, creating a lower cost of ownership and driving value across your entire institution.

### BENEFITS

- ✓ Provides managers and legal departments with full visibility into the contract process
- ✓ Manages the entire contract lifecycle from request to approval to expiration and renewal
- ✓ Automates notifications to avoid missed deadlines and ensure compliance
- ✓ Maximizes existing investments by linking contracts to other systems of record
- ✓ Minimizes delays with remote and mobile access to contracts and approval tasks

### CORE COMPONENTS

[Business Process Automation](#)

[Case Management](#)

[Capture](#)



## FACILITIES DRAWING AND MANUALS MANAGEMENT

A university campus is like a small city, with new construction, renovation and maintenance occurring daily. Quick and easy access to facilities drawings, such as blueprints and architectural renderings, as well as manuals and other related documents is vital to process management – as is the storage and review of that design information.

With OnBase, users store facilities drawings and manuals in a single repository, reducing time spent searching for needed information. Users enjoy instant access to their global files locally using OnBase caching technology, eliminating delays while trying to access large files. OnBase also allows users to distribute drawings to non-CAD users for reference or review, providing shop personnel, maintenance staff, facilities managers and others with quick access to the drawings they need. The Facilities Drawing and Manuals Management solution also increases efficiency in the change management process. OnBase captures, processes, securely stores and manages revisions of drawings so that institutions can focus on more important tasks and initiatives.

### BENEFITS

- ✓ Integrate with CAD systems, allowing users to archive, retrieve and modify compound drawings directly from the CAD applications they use every day
- ✓ Allow non-CAD users to access drawings, speeding up reviews
- ✓ Streamline change management processes for faster project completion

### CORE COMPONENTS

[Capture](#)

[Document Management](#)



## SERVICE REQUEST MANAGEMENT

To manage service requests successfully, university employees must provide a speedy resolution while keeping the customer in the loop. Though requests can vary widely – potential asks include application access, software and hardware upgrades, new enrollment processes and facility work orders – the goal is essentially the same: **to take the steps to fulfill the request while ensuring a positive customer experience.**

For managing work and processes that aren't repeatable and that require a variety of tasks and activities, a case management solution results in greater efficiency. A dynamic case management solution equips customers to make service requests in a simpler way while enabling teams to streamline the fulfillment of those requests. With OnBase, you configure data-driven applications, automate repetitive processes and manage supporting documents.

### BENEFITS

- ✓ Empowers employees to work smarter by providing a 360-degree view into the information users need to make smart decisions, from data records and documents to conversations and emails
- ✓ Increases visibility and control with reporting dashboards and audit trails of all activities, helping institutions identify opportunities for improvement
- ✓ Saves the time and cost of building, managing and upgrading multiple systems by creating content-enabled applications on one point-and-click configurable platform

### CORE COMPONENTS

[Business Process Automation](#)





## ROOM CONDITION TRACKING

To ensure a safe and healthy living experience, housing departments require students to keep their rooms up to Health and Safety Code. Residential Services must perform regular health and safety evaluations on rooms, checking for concerns such as fire hazards, damages, cleanliness, and electrical or structural issues. Based on the result of the first evaluation, a second evaluation may be necessary.

OnBase provides Resident Assistants (RAs) the ability to instantly record evaluation results using mobile devices. RAs capture images of the rooms and inventory as visual representations of the rooms' conditions, which users then attach to the evaluation. RAs may also capture appeal documents for damages reported in the evaluations.

### BENEFITS

- ✓ Provides evaluators with instant access to tracking via mobile access
- ✓ Allows users to support documented room condition by attaching captured images to the evaluation form

### CORE COMPONENTS

[Case Management](#)



## VENDOR MANAGEMENT

Tracking hundreds or even thousands of vendor relationships can be difficult when vendor information is managed in scattered, disparate locations. OnBase improves vendor management processes, allowing you to maintain more productive, beneficial vendor relationships, mitigate risk and better manage vendor-related content.

OnBase allows accounting, procurement and other personnel to interact with vendor-specific information, compliance documents, contract details and correspondence in one central location. It formalizes the vendor request process and sourcing process to improve onboarding and ensure the right data and documents are collected up front. With OnBase, authorized personnel access and interact with all vendor information through the entire relationship without switching between applications. A complete vendor management solution, it helps you maximize relationships and make better purchasing decisions by monitoring issues and reporting on vendor compliance.

### BENEFITS

- ✓ Eliminates information silos with secure, central access to vendor information and critical supporting content
- ✓ Formalizes the request and sourcing process, increasing efficiency and accountability
- ✓ Increases visibility into vendor relationships, improving decision-making
- ✓ Accelerates vendor-related processes with easy access to information and documents
- ✓ Saves time by eliminating the need to switch between applications to find vendor information

### CORE COMPONENTS

[Case Management](#)

[Integration](#)



## ASSET MANAGEMENT

From IT to Facilities, multiple departments must distribute physical assets – from dorm furniture to desk chairs to computers and beyond. The Purchasing department is ultimately responsible for knowing where these assets live, their value and when they require maintenance or replacement.

With OnBase, track all assets across campus and send maintenance interval alerts. Maintain inventory to plan for allocation and assignment across campus, as well as budget for capital expenditure investments.

### CORE COMPONENTS

[Case Management](#)



# ACCOMMODATION FULFILLMENT

Students and faculty with special needs often require adaptive tools or services to ensure their success on campus. But managing Americans with Disabilities Act (ADA) accommodation requests with slow, paper-based processes hinders how well (and how quickly) your institution provides an inclusive experience. Speed the ADA accommodation process and provide improved support with OnBase.

Track the status of student, staff and faculty ADA requests and store copies of documentation in a secure, accessible, central repository. By automatically generating accommodation documentation, OnBase helps free staff to focus on higher-value tasks. In addition, by using OnBase to replace a niche, departmental solution, users across the entire campus gain access and visibility into the services you provide. Create a barrier-free environment to ensure students and staff with disabilities have the tools and support they need to be successful.

## BENEFITS

- ✓ Ensures information integrity with built-in access and security controls
- ✓ Automates the generation of accommodation documentation
- ✓ Broadens visibility into the services being provided to students by replacing a departmental solution with one accessible across campus

## CORE COMPONENTS

[Case Management](#)



# COMPLAINT/GRIEVANCE MANAGEMENT

Unstructured or inconsistent processes for handling employee complaints, grievances, safety violations or misconduct can damage the relationship between employees and their employer. OnBase takes a case management approach to handling employee relations, providing human resources (HR) with a complete view of all the information they need to manage employee issues efficiently and effectively. With all issue-related information at their fingertips, HR staff quickly respond to employee inquiries and improve issue investigation and resolution.

OnBase manages the entire resolution process, from tracking notes and activities to storing supporting documentation and automating notifications for involved parties. Robust and configurable security settings ensure only authorized personnel have access to sensitive employee information and documentation.

### BENEFITS

- ✓ Improves issue investigation and resolution with a complete view of information
- ✓ Standardizes processes for managing issues, ensuring the right information is collected and required steps are followed
- ✓ Increases security and control over sensitive employee information
- ✓ Gives employees confidence in HR's ability to handle issues promptly and consistently



# CONTRACT MANAGEMENT

Take control of your contract management process while mitigating risk across your institution. OnBase manages the entire contract lifecycle from initial request and final approval to expiration dates and renewals. By automating predictable steps, OnBase provides personnel with the information they need to make better recommendations and drive work forward.

OnBase automatically routes contracts for review, approval and execution – including capturing digital signatures. And, with automatic notifications, you won't miss a pending expiration or an auto-renewal. With OnBase, legal personnel have a complete view of all contract-related information, from the contracts themselves to supporting data and documents. At the same time, improved information access across the institution keeps employees apprised of key contract details to facilitate collaboration. OnBase offers a full audit trail, including a history of interactions (with supporting data) for a clear, comprehensive view of current work and upcoming obligations to support compliance. OnBase contract management solutions scale to support a variety of contract types, too, including vendor contracts, employment agreements and NDAs as well as their related processes, creating a lower cost of ownership and driving value across your entire institution.

## BENEFITS

- ✓ Provides managers and legal departments with full visibility into the contract process
- ✓ Manages the entire contract lifecycle from request to approval to expiration and renewal
- ✓ Automates notifications to avoid missed deadlines and ensure compliance
- ✓ Maximizes existing investments by linking contracts to other systems of record
- ✓ Minimizes delays with remote and mobile access to contracts and approval tasks

## CORE COMPONENTS

[Business Process Automation](#)

[Capture](#)

[Case Management](#)



# EMPLOYEE CHANGE REQUEST

Streamlining the employee change process minimizes errors and gives human resources (HR) visibility into the typically manual and multi-department process. OnBase accelerates employee status changes – such as updates to an employee’s position, salary, department, location, etc. – by eliminating paper and automating manual routing.

With OnBase, a secure eform containing up-to-date employee information allows only authorized users to submit employee changes electronically. Multiple employee changes can be made on one form and those changes can kick off processes in several departments. The requests are stored in OnBase where authorized users can easily retrieve the document for reference. Even the most dynamic employee change process can be automated and managed with multi-department checklists that offer HR visibility into the entire process and allow for process changes as needs arise. Notifications can be used to remind users to take action, and detailed notes and action items can be added and tracked through the entire process. OnBase offers Outlook integration and mobile access so managers can approve employee change requests and related documents easily from anywhere.

## BENEFITS

- ✓ Automates and optimizes your change process, allowing HR to focus on higher value tasks
- ✓ Supports compliance by ensuring only authorized users have access to systems/ documents
- ✓ Improves data reliability and includes a complete audit trail in the document history

## CORE COMPONENTS

[Business Process Automation](#)



# EMPLOYEE FILE MANAGEMENT

Better manage employee files by equipping human resources (HR) with secure, instant access to information. With OnBase, HR departments store employee documents electronically in one central location, reducing the time spent searching for content while increasing security and supporting compliance initiatives. Whether employee documents are scanned, faxed or emailed, you can eliminate the need to manage multiple, paper-based copies, reducing associated costs and process delays.

OnBase connects with your human resources information system (HRIS), allowing authorized personnel to retrieve employee documents and data without leaving familiar applications. This instant access to information, minimizes training requirements and enables HR to provide better service by rapidly responding to employee requests. Rather than creating separate files to maintain confidential employee information, you can store all content in a single, secure location. With all documents managed electronically in OnBase and full control over who has access to your HR system and what they can do, you ensure that critical employee information is secure. The ability to track document activity and access a full auditable history of actions further increases employee accountability.

## BENEFITS

- ✓ Streamlines management of employee files, reducing paper usage and associated costs
- ✓ Automates document retention and supports compliance initiatives
- ✓ Ensures security of critical employee documents and data

## CORE COMPONENTS

[Capture](#)

[Document Management](#)





# EMPLOYEE ONBOARDING/SEPARATION

OnBase gives human resources (HR) personnel the tools they need to better manage the onboarding process and provide new employees with a smooth transition. With a holistic view of all related information in a single location, HR staff can easily track the entire onboarding process and monitor tasks across departments. Through automation, increased visibility and centralized information management, OnBase supports more effective onboarding and ultimately ensures new employees receive the best service so they are ready for work on day one.

Just like proper onboarding, it is also critical that HR staff ensure all the actions resulting from an employee contract termination are efficiently and effectively executed. With OnBase, HR staff can automate the management of necessary activities for departing employees, ensuring tasks – system and building access removal, and payroll and benefit instructions – are completed in a timely manner.

### BENEFITS

- ✓ Improves onboarding with centralized information management, reducing paper usage and associated costs
- ✓ Increases staff accountability with automatic checklists
- ✓ Enhances employee service by increasing efficiency and accuracy
- ✓ Ensures proper procedures are followed for employee dismissal

### CORE COMPONENTS

[Business Process Automation](#)

[Capture](#)

[Document Management](#)



# FACULTY LEAVE DOCUMENTATION

Effectively tracking and reviewing the leave documentation for faculty, administrative professionals and State Classified employees is not only vital to the operations of your educational institution, it also impacts the livelihood of your staff members and their families. OnBase's tool for Faculty Leave Documentation provides a comprehensive solution for the creation, management and routing of the forms needed for all types of leave – including vacation and sick leave, short- and long-term disability, worker's compensation, parental leave and more.

Through completion of standard or customized electronic forms, OnBase allows faculty to easily submit requests for leave along with the proper justification. These forms can then be automatically routed to the appropriate people for approval (e.g. Deans, payroll and HR professionals, etc.) using OnBase workflow, making sure everyone is properly informed and processes are compliant.

### BENEFITS

- ✓ Expedites leave approval processes
- ✓ Streamlines scheduling and position backfilling
- ✓ Ensures compliance with State and institutional labor policies

### CORE COMPONENTS

[Business Process Automation](#)

[Capture](#)

[Document Management](#)



# HR EMPLOYEE REVIEW

Conducting regular and thorough performance evaluations is vital to ensuring all employees adhere to the standards of your educational institution and contribute to its overall mission. However, collecting, organizing, managing and maintaining all of the documentation required for an accurate and meaningful review can be a time-consuming hassle.

OnBase provides HR staff with a secure, central document repository for storage of all employee files, including those for performance management. As documentation is gathered during the employee review process, it can be placed in the employee's electronic file with other related documents. This ensures all content associated with an employee is stored in an organized manner and easily accessible by your institution's HR personnel. OnBase also provides point-and-click integration with your existing performance management system, allowing HR personnel to access and review employee documents directly from the interface of this core application.

## BENEFITS

- ✓ Reduces time spent searching for and collecting performance-related documentation
- ✓ Improves user convenience and productivity by allowing employee review documents to be directly accessed from performance management system
- ✓ Enhances security around performance related documentation
- ✓ Eliminates physical storage and unnecessary document duplication

## CORE COMPONENTS

[Business Process Automation](#)



# I-9 PROCESSING

Employee eligibility regulations can be difficult to interpret and non-compliance can result in fines and legal fees. Onsite inspections by U.S. Immigration and Customs Enforcement have nearly tripled since 2009, and fines can be levied for improperly completed forms and missing documentation.

Don't let mismanaged I-9 processes damage your institution's finances and reputation. OnBase's I-9 Processing solution combines powerful electronic forms, content management and workflow tools to ensure I-9s are completed correctly and in compliance with changing E-Verify rules. The solution allows you to maintain a single, secure database of all I-9s. I-9 forms can be completed and signed electronically or previously completed paper I-9s and supporting documentation can be scanned into OnBase. The workflow tools also allow you to automatically track expiring work authorizations and receive notification when I-9s no longer need to be retained.

### BENEFITS

- ✓ Simplifies employment verification and compliance
- ✓ Assures complete documentation
- ✓ Streamlines migration of historical I-9s

### CORE COMPONENTS

[Business Process Automation](#)

[Case Management](#)



# PERSONNEL ACTION REQUESTS

OnBase's Personnel Action Requests (PAR) solution leverages the power of Unity Forms to provide simple form creation, easy user access and form submission for end users reporting a change in staff work status. Whether it is requesting a new hire, making a change in work status, promotion or separation, the PAR solution makes it simple to kick off the HR work stream.

The PAR solution allows users to create a new form with the click of a mouse, providing or hiding information based on need, eliminating the chance users will provide too little – or too much – information. Paired with a workflow solution, OnBase can notify both the submitter and requester if there is a change in form status, providing a transparent view of the process.

### BENEFITS

- ✓ Build forms to complete mathematical calculations and validate data as it is entered, ensuring completeness
- ✓ Make information instantly available
- ✓ Eliminate paper and increase processing speed

### CORE COMPONENTS

[Business Process Automation](#)



# POLICIES AND PROCEDURES

A well-informed workforce improves productivity and reduces risk. But, it's not always easy for human resources (HR) to manage the paperwork and track compliance with policies and procedures. With OnBase, HR departments efficiently create, distribute and track employee acknowledgement of policies and procedures while reducing associated administrative tasks such as filing, copying and mailing documents.

HR staff can quickly send email notifications containing links to policies within OnBase to the entire workforce, or specific employee groups. This saves time and eliminates the need to manually distribute paper-based copies. With policy documents, training videos and other supporting content stored centrally and securely in OnBase, you improve employee access to crucial information, facilitating easy acknowledgement and review. Stay on top of which employees have acknowledged policies and which have not with automatic tracking of employee acknowledgement and reporting. HR staff can easily notify individuals of noncompliance and resolve issues quickly, strengthening compliance and minimizing liability.

## BENEFITS

- ✓ Streamlines policy creation and approval by automatically tracking all updates and revisions
- ✓ Improves employee access to documents for review while reducing paper usage and manual effort
- ✓ Provides HR with greater visibility into who has/has not acknowledged policies
- ✓ Increases employee accountability

## CORE COMPONENTS

[Capture](#)

[Document Management](#)



# RECRUITING AND SELECTION

Free human resources (HR) from paper-based, manual processes, and allow recruiters to focus on finding the best candidates for open positions. With OnBase, applicant information is centrally located so your HR team has access to the information they need, when they need it, to make smart hiring decisions. Applications and resumes are electronically sorted and instantly distributed to the right staff, easing the process of scheduling interviews and sending correspondence.

OnBase provides visibility into the entire process, from recruitment to the offer letter. Hiring managers have easy access to review information, open positions, applicants, and where recruitment stands in the process. OnBase ensures candidates' documentation is never lost in the process.

### BENEFITS

- ✓ Shortens the recruiting cycle, decreasing the loss of qualified candidates
- ✓ Reduces time spent searching for resumes and offers a searchable pool of candidates
- ✓ Gives HR greater visibility into the pipeline of a candidate for any given position
- ✓ Streamlines management of the offer letter process, allowing more time to be spent on high-value tasks

### CORE COMPONENTS

[Business Process Automation](#)



# STAFF POSITION REQUEST

Whether it's to replace terminated or retiring faculty members and employees or simply to address an increase in workload, requesting a new position to be filled is a common occurrence in higher education. It's in the best interest of the requesting department, human resources and the entire institution for these requests to be processed and routed accurately and effectively. Unforeseen delays can lead to repeat work, approval roadblocks and a failure to fill a much needed position.

The OnBase Staff Position Request solution combines electronic forms, content management and workflow tools to streamline and manage the completion, routing and management of staff position requests. Using this tool, supervisors can either complete an electronic staff position request form or scan in a completed paper form. These forms, and accompanying job description documents, are then automatically routed to the appropriate personnel (e.g. Department Chair, Administrative Manager, etc.) for approval and ultimately to Human Resources for final assessment and posting.

## BENEFITS

- ✓ Accelerates staff position request approvals and job postings
- ✓ Eliminates lost requests with a centralized repository
- ✓ Ensures communication and alignment between department heads and HR





# TUITION REMISSION

Tuition remission is an important benefit for your institution's employees and their dependents. But determining eligibility, gathering the right documentation and getting approvers to review and sign off is a labor intensive process if your organization is still using manual processes or disparate systems.

OnBase simplifies the tuition remission process by enabling requestors to easily provide required information and documentation to managers, HR representatives and other approvers who can seamlessly review and verify their requests. And once approved, your institution's finance office is automatically notified that a tuition reimbursement has been authorized.

## BENEFITS

- ✓ Documentation, like course descriptions and transcripts, can be easily uploaded by requestors
- ✓ Requestors can see the status of their tuition remission requests, reducing the time spent by staff answering inquiries
- ✓ All approvers can review and verify eligibility from one single interface
- ✓ Your institution's finance, payables or bursar's office has visibility into reimbursement approval status

## CORE COMPONENTS

[Business Process Automation](#)



# ACCOMMODATION CORRESPONDENCE MANAGEMENT

Students and faculty with special needs often require adaptive tools or services to ensure their success on campus. But managing Americans with Disabilities Act (ADA) accommodation requests with slow, paper-based processes hinders how well (and how quickly) your institution provides an inclusive experience. Support the ADA accommodation process and provide improved support with OnBase.

Track and assign all email, phone, fax and letter correspondence related to accommodation request and assignment for students and faculty with disabilities. Assign correspondence to the appropriate people in various departments across campus for review. Track the status of each piece of correspondence as reviewers add notes and follow-up on necessary items.

### BENEFITS

- ✓ Tracks and monitors the status of all correspondence in one system
- ✓ Allows you to assign follow-up tasks quickly
- ✓ Ensures that employees complete all tasks with automated notifications and reminders

### CORE COMPONENTS

[Business Process Automation](#)



# ASSET TRACKING

Students and faculty with special needs often require adaptive tools or services to ensure their success on campus. Once Disability Resources fulfills Americans with Disabilities Act (ADA) accommodation requests and assigns assets, it is important to document and track whom or where the item is in possession, as well as the date it is due back to the Disability Resources Office.

OnBase tracks the status of the items requested by students, staff and faculty and automatically notifies Disability Resources staff as well as the lender of pending due dates. By using OnBase to replace a niche, departmental solution, users across the entire campus gain access and visibility into the services you provide. Users can also manage asset inventory to accurately assess the need to invest in additional ADA compliant equipment. Create a barrier-free environment to ensure students and staff with disabilities have the tools and support they need to be successful.

## BENEFITS

- ✓ Automatically notifies staff and lenders of pending due dates
- ✓ Broadens visibility into the services being provided to students by replacing a departmental solution with one accessible across campus
- ✓ Allows users to manage asset inventory and accurately assess the need for future ADA-compliant investments

## CORE COMPONENTS

[Case Management](#)



# STUDENT JOB APPLICATION

The student job application process has many moving parts for hiring departments across campus. Often times each department has its own application form with unique requirements. Before conducting interviews, the HR department must collect accurate and complete information from each student applicant.

Leveraging electronic forms, OnBase facilitates application submission and offers features such as capturing student availability schedules and required supplemental documentation – like photo IDs or portfolios. Upon submission, applications route to hiring managers, allow staff to track interview scheduling and provide visibility into candidate pipeline. HR and hiring managers use OnBase to easily manage approvals and assign rejected candidates to the reconsideration pool. In addition, OnBase automatically notifies the hiring supervisor, HR department and applicant of status changes throughout the hiring process.

### BENEFITS

- ✓ Updates applicants upon any changes in application status with automatic notifications
- ✓ Tracks application and job history to support financial aid requirements for students
- ✓ Integrates with job portal to capture Job ID and other relevant information
- ✓ Integrates with Microsoft Outlook to handle interview schedules and approvals

### CORE FUNCTIONALITY

[Business Process Automation](#)

[Capture](#)



# RA APPLICATION

Resident assistants (RAs) are an important part of dorm life at colleges and universities. With OnBase, students who wish to apply for a leadership opportunity as an RA simply fill out an online application via a student portal or other university website. OnBase notifies the user of missing information and protects against the misplacement of important documents. OnBase offers electronic signatures and tracks the progress of submitted documents. Upon completion of the application, the submission routes automatically to the parties active in the decision making process.

### BENEFITS

- ✓ Creates a central place for housing and human resources to access electronic applications
- ✓ Notifies applicants and hiring managers of application status throughout the process
- ✓ Eliminates paper-based processes that result in lost or misplaced applications

### CORE COMPONENTS

Business Process Automation

Capture



# HELP DESK

The Help Desk is the face of your Information Technology team to the rest of the campus. A responsive Help Desk gains you recognition as a support superstar, while an inept one only heightens the frustration users experience when their technology isn't working as it should. Using OnBase for IT Help Desk ensures you're always equipped to play the part of the hero. The solution allows you to streamline and manage incoming help requests – improving accessibility, visibility and accountability for system and hardware issues.

The IT Help Desk solution provides users with a simple request form that is automatically routed to the appropriate IT personnel based on job type. Requests can be dynamically assigned to team members, automatically notifying users of the technician assigned to their case. The tool also allows users to track the status of their requests any time. Finally, with OnBase, IT managers gain visibility into outstanding requests and historical information that enable them to analyze trends and alter processes to improve performance.

## BENEFITS

- ✓ Improves customer service with automated workflow and responses
- ✓ Eliminates lost requests with a centralized repository
- ✓ Increases IT staff efficiency with automated request routing and escalation
- ✓ Enables ongoing improvement with volume and trend reporting capabilities

## CORE COMPONENTS

[Case Management](#)



# IT CHANGE MANAGEMENT

Higher Education institutions need to minimize the negative impacts of changes to core information technology systems to avoid disruption in day-to-day processes. The only way to do this effectively is through a system for IT change management that keeps all key players informed and on task.

The OnBase IT Change Management solution improves the management and communication of changes to your institution's mission-critical IT systems and infrastructure. Using OnBase's configurable forms and workflow tools, this solution provides an efficient and automated process to request, review and approve IT changes – including upgrades, refreshes, replacements and planned outages. System managers can review, schedule, coordinate and assign IT changes. Furthermore, the solution allows them to maintain a history of requested changes for their assigned systems.

## BENEFITS

- ✓ Ensures IT changes are communicated consistently, instead of by word of mouth, or not at all
- ✓ Improves visibility into institution-wide changes, helping to reduce the impact on daily business processes
- ✓ Enhances department efficiency by sending automated change notifications that free up IT staff for higher-value projects

## CORE COMPONENTS

[Business Process Automation](#)



# SYSTEM ACCESS REQUESTS

Ensuring new and existing employees are quickly and accurately granted access to the systems they need to do their jobs is vital to ensuring your institution runs like it should. Paper-based processes for tracking system access requests are often manual and error prone, leading to lost documentation, extended approval cycles and delayed system access. OnBase's solution for System Access Requests fixes all that. The tool allows you to streamline and manage incoming system requests – improving accessibility, visibility and accountability for system access execution.

The System Access Requests solution provides users with a simple request form that documents the employee, their position and the systems they need to access. This form is then automatically routed to the appropriate institutional personnel for approval and then onto IT for system access to be granted. The tool also allows users to track the status of their requests any time. Finally, with OnBase you can gain visibility into outstanding requests and historical information that enables you to analyze trends and alter processes to improve performance.

## BENEFITS

- ✓ Provides managers and legal departments with full visibility into the contract process
- ✓ Manages the entire contract lifecycle from request to approval to expiration and renewal
- ✓ Automates notifications to avoid missed deadlines and ensure compliance
- ✓ Maximizes existing investments by linking contracts to other systems of record
- ✓ Minimizes delays with remote and mobile access to contracts and approval tasks

## CORE COMPONENTS

[Business Process Automation](#)

[Capture](#)

[Case Management](#)





# ASSET MANAGEMENT

From IT to Facilities, multiple departments must distribute physical assets – from dorm furniture to desk chairs to computers and beyond. The Purchasing department is ultimately responsible for knowing where these assets live, their value and when they require maintenance or replacement.

With OnBase, track all assets across campus and send maintenance interval alerts. Maintain inventory to plan for allocation and assignment across campus, as well as budget for capital expenditure investments.

## CORE COMPONENTS

[Case Management](#)



## CONTRACT MANAGEMENT

Take control of your contract management process while mitigating risk across your institution. OnBase manages the entire contract lifecycle from initial request and final approval to expiration dates and renewals. By automating predictable steps, OnBase provides personnel with the information they need to make better recommendations and drive work forward.

OnBase automatically routes contracts for review, approval and execution – including capturing digital signatures. And, with automatic notifications, you won't miss a pending expiration or an auto-renewal. With OnBase, legal personnel have a complete view of all contract-related information, from the contracts themselves to supporting data and documents. At the same time, improved information access across the institution keeps employees apprised of key contract details to facilitate collaboration. OnBase offers a full audit trail, including a history of interactions (with supporting data) for a clear, comprehensive view of current work and upcoming obligations to support compliance. OnBase contract management solutions scale to support a variety of contract types, too, including vendor contracts, employment agreements and NDAs as well as their related processes, creating a lower cost of ownership and driving value across your entire institution.

### BENEFITS

- ✓ Provides managers and legal departments with full visibility into the contract process
- ✓ Manages the entire contract lifecycle from request to approval to expiration and renewal
- ✓ Automates notifications to avoid missed deadlines and ensure compliance
- ✓ Maximizes existing investments by linking contracts to other systems of record
- ✓ Minimizes delays with remote and mobile access to contracts and approval tasks

### CORE COMPONENTS

[Business Process Automation](#)

[Capture](#)

[Case Management](#)



## FERPA REQUESTS

The Family Educational Rights and Privacy Act (FERPA) protects the privacy of student education records. To remain compliant with the federal law, schools must ensure the right school employees have access to student information. They also need to be confident that the storage, sharing and transmission of student information is safe and secure, and staff handle student requests for information quickly and completely.

OnBase for FERPA Requests relieves much of that burden by digitizing student records and tracking requests and responses.

### BENEFITS

- ✓ Requests are easier to manage using OnBase Forms and Workflow
- ✓ Minimizes chances of lost, incorrectly indexed or otherwise missing data
- ✓ Redaction process is faster and creates less waste (e.g. - printing, redacting, photocopying)
- ✓ Digitizing student records sets the stage for faster retrievals for operational use and applying retention rules to records

### CORE COMPONENTS

[Business Process Automation](#)



## FREEDOM OF INFORMATION ACT (FOIA) SOLUTION

In general, public and private universities are not subject to the rules governing the Freedom of Information Act (FOIA). But certain information provided to the Federal government, including the Department of Education, or produced by university employees or for the university, including research and grant applications, using Federal government funding, could be considered to be public records that must be disclosed by the Federal government under FOIA.

The FOIA requires the delivery of documents and data to requestors when solicited. And today, requestors expect a quick turnaround with regard to delivery. OnBase's FOIA solution relieves much of that burden by digitizing student records, tracking requests and responses, and giving schools the tools to proactively post certain records on websites, reducing the number of requests agencies receive in the first place.

### BENEFITS

- ✓ Requests are easier to manage using OnBase Forms and Workflow
- ✓ Minimizes chances of lost, incorrectly indexed or otherwise missing data
- ✓ Redaction process is faster and creates less waste (e.g. - printing, redacting, photocopying)
- ✓ Digitizing student records sets the stage for faster retrievals for operational use and applying retention rules to records

### CORE COMPONENTS

[Business Process Automation](#)



## LEGAL CASE MANAGEMENT

Legal matters at the university level range from student legal services to contract management and negotiation. Cases are complex and varied, requiring sophisticated information management and workflow to assure they are handled appropriately and efficiently. Demands include matter and case management, litigation support, communication and collaboration, research, data security, storage and archive accessibility.

The OnBase case management solution enables university law offices to address a range of challenges and manage unpredictable, information-centric work. The solution provides a complete view of information with critical data and supporting content instantly accessible to all authorized employees throughout the case. This allows for effective collaboration, whether that's while completing a project, resolving an issue or providing exceptional legal service.

### BENEFITS

- ✓ Manage not only content, but also tasks and activities to ensure deadlines are not missed and cases are resolved in a timely matter
- ✓ Maintain compliance by tracking any and all interactions with those involved in the case
- ✓ Gain visibility with all information stored in a central, accessible system with robust reporting capabilities

### CORE COMPONENTS

[Business Process Automation](#)

[Capture](#)

[Case Management](#)



## AGENDA MANAGEMENT

The OnBase Agenda Management Suite enables institutions to effectively manage a variety of meeting types by automating the process of creating meetings and meeting documents, gathering votes and minutes during the meeting, and publishing meeting information to your website. The solution includes:

- **OnBase Agenda:** Staff can create agenda items, upload related documents and route items for review through workflows. OnBase compiles meeting documents and supporting materials and packages them for easy distribution to stakeholders, council members and others.
- **OnBase Minutes:** Streamlines the meeting process by providing a means to record motions, votes, minutes and other facets of the meeting. Add, remove, edit and rearrange agenda items as changes occur during the meeting.
- **OnBase Agenda Online:** This customizable web portal allows the publication of meeting documents to your website. With a single click, make information available to constituents.

### BENEFITS

- ✓ Supports collaboration among staff by allowing users from multiple locations to simultaneously participate in the agenda planning process
- ✓ Ensures the most current versions of documents are included in meeting packets
- ✓ Increases transparency by offering a comprehensive view of the process and the status of individual agenda items

### CORE COMPONENTS

[Business Process Automation](#)



## BOARD AND TRUSTEE MINUTES

Capture, retain, retrieve and protect campus-trustee minutes via OnBase. Safely and securely archive these important historical records and retrieve pertinent information when needed. Perform a full-text search for keywords that support a presidential speech or review of institutional decisions during a critical time-period. Quickly access historical records, for example, as a reference for everything from facilities questions to faculty remarks.

### BENEFITS

- ✓ Provides a full digital history to board members and committee chairs without excessive copying and filing of old documents
- ✓ Allows easy access to historic records for milestone celebrations such as the approval of a building or the naming of a new president
- ✓ Makes board member transitions easier

### CORE COMPONENTS

[Business Process Automation](#)



## ONE STUDENT RECORD

There are many systems on campus that house information you need to know to help your students succeed. But when student information is stored across campus, in disparate technologies, file cabinets and spreadsheets, it is difficult for student-facing staff to effectively serve students.

One Student Record seamlessly consolidates information from core line of business tools such as the SIS, degree audit, student counseling and learning management. Information also comes in from departmental tools in areas like Student Disability Services, Housing/Residential Life and Veteran Student Services – just to name a few. Wherever key student data exists, OnBase unifies it. Create a single, central, instantly accessible record for all information surrounding every student enrolled at your institution—giving all student-facing staff a single place to turn for up-to-date student information, without duplicating data in systems. The result? Simplified processes, accelerated task completion and, ultimately, increased student satisfaction, retention and success.

### BENEFITS

- ✓ Provides a holistic view of the student record from one central location
- ✓ Controls access with built-in, highly granular security
- ✓ Flexibly integrates with existing systems that house student data
- ✓ Automatically alerts advisors, counselors and others when thresholds are met so action can be taken to help struggling students succeed

### CORE COMPONENTS

[Capture](#)

[Case Management](#)

[Integration](#)

[Reporting](#)





## PRESIDENT'S OFFICE CORRESPONDENCE MANAGEMENT

Track and assign all email, phone, fax and letter correspondence to the president. Assign correspondence to the appropriate people in various departments across campus, such as athletics or public relations, for review. Track the status of each piece of correspondence as reviewers add notes, follow-up on necessary items and document a proper resolution.

### BENEFITS

- ✓ Tracks and monitors the status of all correspondence in one system
- ✓ Allows you to assign follow-up tasks quickly
- ✓ Ensures that employees complete all tasks with automated notifications and reminders
- ✓ Enables you to resolve challenges quickly to protect the institution's brand, facilitate a great experience with the institution, and satisfy students, alumni and donors

### CORE COMPONENTS

[Business Process Automation](#)



## CRIMINAL JUSTICE CASE MANAGEMENT

Simplify the gathering and reporting on data around the criminal justice system with OnBase. OnBase captures case data – articles from the web and newspapers, coding sheets containing police crime data, etc. – stores it electronically and makes it full-text searchable for future retrieval. The solution also leverages OnBase case management capabilities to automatically run reports on captured data for further statistical analysis.

### BENEFITS

- ✓ Captures electronic and physical content and data
- ✓ Simplifies the retrieval of required case documents and data
- ✓ Automates report generation to provide further insight into collected data

### CORE COMPONENTS

[Case Management](#)



## FAMILY AND MARRIAGE RESEARCH TRACKING

Simplify the collection, tracking and reporting on of family and marriage research data with OnBase. OnBase captures case documents and data – articles from the web and newspapers, data sheets, etc. – stores it electronically and makes it full-text searchable for future retrieval. The solution also leverages OnBase case management capabilities to automatically run reports on captured data for further statistical analysis.

### BENEFITS

- ✓ Captures electronic and physical content and data
- ✓ Simplifies the retrieval of required case documents and data
- ✓ Automates report generation to provide further insight into collected data

### CORE COMPONENTS

[Case Management](#)



## POLICE CRIME TRACKING

Simplify the gathering and reporting on data around crime data with OnBase. OnBase captures case data – articles from the web and newspapers, coding sheets containing police crime data, etc. – stores it electronically and makes it full-text searchable for future retrieval. The solution also leverages OnBase case management capabilities to automatically run reports on captured data for further statistical analysis.

### BENEFITS

- ✓ Captures electronic and physical content and data
- ✓ Simplifies the retrieval of required case documents and data
- ✓ Automates report generation to provide further insight into collected data

### CORE COMPONENTS

[Case Management](#)



# CURRICULUM REVIEW

Quick delivery of new or revised courses and programs is critical to an institution's ability to provide a superior education, attract and retain students, and enhance student satisfaction. All too often, cumbersome, paper-intensive submission, review and approval processes delay curriculum changes.

With OnBase, faculty members or program chairs submit course and program request forms electronically, improving accuracy while eliminating the risk of lost or unsecure paper forms. Rather than traveling through campus mail, automated workflows route the materials among various stakeholders for collaboration, review and approval – from individual faculty members and committees to program deans, the VP of Academic Affairs, trustees, state system offices and so forth. Based on predefined business rules, OnBase keeps the paperless review process moving by delivering complete electronic files, including supporting documentation, to reviewers and committees right when they need them. Multiple reviewers can access the electronic files simultaneously, whether on campus or online – even from mobile devices such as tablets and smart phones. OnBase tracks the review process, identifies bottlenecks and other delays, and sends notifications of upcoming deadlines and delinquent actions.

## BENEFITS

- ✓ Accelerates program and curriculum changes to facilitate a superior educational experience
- ✓ Streamlines communication to protect accreditation
- ✓ Automates notifications to ensure deadlines are met
- ✓ Eliminates paper-intensive submission, review and approval processes that cause delays

## CORE COMPONENTS

[Business Process Automation](#)

[Enterprise File Sync and Share](#)



# FACULTY ONBOARDING

Manually routing, collecting and filing application materials, transcripts and other credentials – along with employment-supporting documents like I-9 forms, compensation plans, etc. – make faculty onboarding a slow and cumbersome process.

OnBase manages applicant (and eventual new employee) files electronically in a secure, central repository. With automated tools for performing actions like routing for review, tracking required documents and updating systems of record with new information, OnBase empowers colleges and universities focus on maintaining and growing faculty talent pools.

### BENEFITS

- ✓ Creates a single, central repository for all applicant and faculty documents and information
- ✓ Routes all required documents to reviewers via an automated workflow
- ✓ Automatically tracks which required documents have been received or are still missing

### CORE COMPONENTS

Business Process Automation

Capture



# TENURE & PROMOTION

Colleges and universities have long relied on a complex web of cross-campus, interdepartmental collaboration to manage faculty tenure and promotion. No matter what type of faculty member you are considering for promotion, the number of detailed documents and extenuating circumstances to consider is extensive.

OnBase replaces paper-based, manual information gathering with electronic filing and workflow. This gives authorized users instant access to application files – all of which are securely housed in a central document repository. Utilizing business process management tools, OnBase automatically assigns files to individual reviewers or committees and prompts users to enter ratings and comments on an electronic review sheet, speeding up the review process. With access via mobile devices such as tablets and smart phones, the information you need remains secure and available whether you're working on or off campus.

If necessary, users can also seek input from additional reviewers not formally assigned to the review process – such as faculty from another institution who may have collaborated with the applicant on a research project. OnBase can also identify where processes stall and escalate decisions if the criteria warrants, and automate regular communication with the Provost and HR offices to ensure a smooth, successful process. Give your Provost and related departments an automated, secure way to manage the complete tenure review and promotion process, ensuring fairness and visibility throughout.

### BENEFITS

- ✓ Provides electronic filing and automatic routing of documents and information
- ✓ Updates faculty automatically on review status and required documentation
- ✓ Enables you to create permission-based access to documents while keeping a complete audit trail of changes
- ✓ Enables stakeholders to instantly access and share required information across departments and increase visibility into every stage of the review process
- ✓ Ensures transparency while guaranteeing security and compliance

### CORE COMPONENTS

[Business Process Automation](#)

[Capture](#)

[Document Management](#)

[Enterprise File Sync and Share](#)



## GRANTS MANAGEMENT

To make compliance a breeze, rely on the OnBase Grants Management solution to centrally manage the grant proposal approval and review process. Once a grant opportunity is identified and a proposal to apply for the grant is initiated, OnBase expedites internal reviews by automatically routing initial drafts to the appropriate parties – including committees – and provides the opportunity for both multiple levels of and parallel reviews to keep the process moving and meet aggressive deadlines. Additionally, staff can easily manage post-award reporting with the solution's robust reporting capabilities.

### BENEFITS

- ✓ Speeds review of proposal drafts by routing to multiple departments for simultaneous review
- ✓ Provides greater visibility to the Principal Investigators and Grant Directors
- ✓ Sends timely reminders based on grant deadline
- ✓ Assigns and tracks grants with cost-share or matching cost calculations for multiple departments

### CORE COMPONENTS

[Business Process Automation](#)

[Case Management](#)





## INCIDENT CASE MANAGEMENT

When an incident occurs on campus – from property damage to critical activity – it is vital that caseworkers have access to all of the pertinent information needed to perform an investigation and develop a resolution.

OnBase enables you to track and report on all information related to significant issues or events that involve people, interactions and investigation information. View incident details that include both structured and unstructured information, including documents, interviews, photographs, notes, dates, timestamps and more. With strict permissions settings, you ensure that only the appropriate parties are able to access case information. And, because it is stored electronically, you no longer have to worry about files or evidence becoming lost on a desk somewhere or saved to a desktop – eliminating both security and accessibility risks. Plus, built-in dashboards and reports make it easy to analyze trends and fulfill audit requirements.

### BENEFITS

- ✓ Accelerates program and curriculum changes to facilitate a superior educational experience
- ✓ Streamlines communication to protect accreditation
- ✓ Automates notifications to ensure deadlines are met
- ✓ Eliminates paper-intensive submission, review and approval processes that cause delays

### CORE COMPONENTS

[Capture](#)

[Case Management](#)



## ACCOMMODATION FULFILLMENT

Students and faculty with special needs often require adaptive tools or services to ensure their success on campus. But managing Americans with Disabilities Act (ADA) accommodation requests with slow, paper-based processes hinders how well (and how quickly) your institution provides an inclusive experience. Speed the ADA accommodation process and provide improved support with OnBase.

Track the status of student, staff and faculty ADA requests and store copies of documentation in a secure, accessible, central repository. By automatically generating accommodation documentation, OnBase helps free staff to focus on higher-value tasks. In addition, by using OnBase to replace a niche, departmental solution, users across the entire campus gain access and visibility into the services you provide. Create a barrier-free environment to ensure students and staff with disabilities have the tools and support they need to be successful.

### BENEFITS

- ✓ Ensures information integrity with built-in access and security controls
- ✓ Automates the generation of accommodation documentation
- ✓ Broadens visibility into the services being provided to students by replacing a departmental solution with one accessible across campus

### CORE COMPONENTS

[Case Management](#)



# ACCOMMODATION CORRESPONDENCE MANAGEMENT

Students and faculty with special needs often require adaptive tools or services to ensure their success on campus. But managing Americans with Disabilities Act (ADA) accommodation requests with slow, paper-based processes hinders how well (and how quickly) your institution provides an inclusive experience. Support the ADA accommodation process and provide improved support with OnBase.

Track and assign all email, phone, fax and letter correspondence related to accommodation request and assignment for students and faculty with disabilities. Assign correspondence to the appropriate people in various departments across campus for review. Track the status of each piece of correspondence as reviewers add notes and follow-up on necessary items.

## BENEFITS

- ✓ Tracks and monitors the status of all correspondence in one system
- ✓ Allows you to assign follow-up tasks quickly
- ✓ Ensures that employees complete all tasks with automated notifications and reminders

## CORE COMPONENTS

[Business Process Automation](#)



## ASSET TRACKING

Students and faculty with special needs often require adaptive tools or services to ensure their success on campus. Once Disability Resources fulfills Americans with Disabilities Act (ADA) accommodation requests and assigns assets, it is important to document and track whom or where the item is in possession, as well as the date it is due back to the Disability Resources Office.

OnBase tracks the status of the items requested by students, staff and faculty and automatically notifies Disability Resources staff as well as the lender of pending due dates. By using OnBase to replace a niche, departmental solution, users across the entire campus gain access and visibility into the services you provide. Users can also manage asset inventory to accurately assess the need to invest in additional ADA compliant equipment. Create a barrier-free environment to ensure students and staff with disabilities have the tools and support they need to be successful.

### BENEFITS

- ✓ Automatically notifies staff and lenders of pending due dates
- ✓ Broadens visibility into the services being provided to students by replacing a departmental solution with one accessible across campus
- ✓ Allows users to manage asset inventory and accurately assess the need for future ADA-compliant investments

### CORE COMPONENTS

[Case Management](#)



## RA APPLICATION

Resident assistants (RAs) are an important part of dorm life at colleges and universities. With OnBase, students who wish to apply for a leadership opportunity as an RA simply fill out an online application via a student portal or other university website. OnBase notifies the user of missing information and protects against the misplacement of important documents. OnBase offers electronic signatures and tracks the progress of submitted documents. Upon completion of the application, the submission routes automatically to the parties active in the decision making process.

### BENEFITS

- ✓ Creates a central place for housing and human resources to access electronic applications
- ✓ Notifies applicants and hiring managers of application status throughout the process
- ✓ Eliminates paper-based processes that result in lost or misplaced applications

### CORE COMPONENTS

Business Process Automation

Capture



## TITLE IX COMPLIANCE MANAGEMENT

Colleges and universities that receive federal funds are legally responsible when they know about and ignore sexual harassment or assault in their programs or activities.

Using OnBase, faculty, staff or students submit a simple electronic form to report any type of harassment on campus. The form then routes to the compliance office for review and from there, the appropriate parties can take any necessary action or monitor the situation. OnBase archives the form and any supporting documentation for historical record.

### CORE COMPONENTS

[Case Management](#)



# CHECKLIST UPDATING

For higher education processes that require checklisting – such as admissions, financial aid and transcript capture – OnBase integrates with the student information system to create a seamless process. As OnBase receives applicant or student documents, the system sends a flag to your institution's SIS via workflow. The integration between OnBase and the SIS has flexible configuration options, from a simple file upload process to a robust real-time integration utilizing web services, APIs or other methods.

## CORE COMPONENTS

[Business Process Automation](#)

[Capture](#)

[Integration](#)



# I-20 PROCESSING

Once a prospective student accepts an institution's offer of admission, a workflow within OnBase triggers the execution of the I-20 process. The system enables staff in the Admissions office to manage the I-20 process alongside the offer letter process for those students who require sponsorship. The I-20 form and any supporting documentation is then be archived in OnBase for historical record.

### CORE COMPONENTS

[Business Process Automation](#)

[Capture](#)





## LOOSE CREDENTIAL MATCHING

As unindexed documents or “orphaned” documents reside within OnBase, a matching process occurs for these student records. Exact matches and potential matches to a known student or applicant periodically present to the processor to verify and confirm the correct student ID. This automatic matching eliminates cumbersome processing time for unknown documents that are received either electronically or physically.

### BENEFITS

- ✓ Eliminates cumbersome processing time for unknown documents
- ✓ Automates the matching of loose credentials

### CORE COMPONENTS

[Business Process Automation](#)

[Integration](#)