



Hyland

Global Services

Florida Atlantic University

OnBase Solution Training Guide

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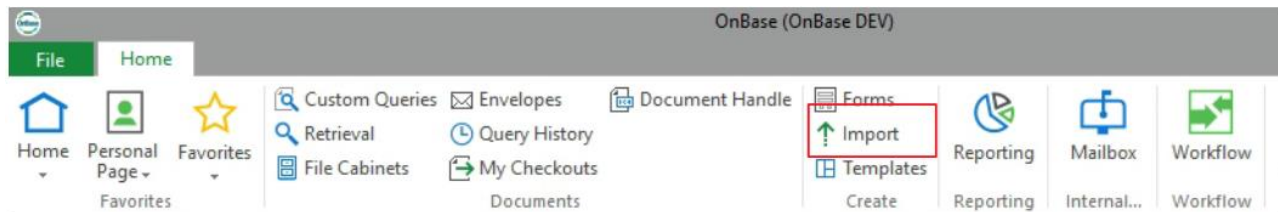
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Ingesting Documents

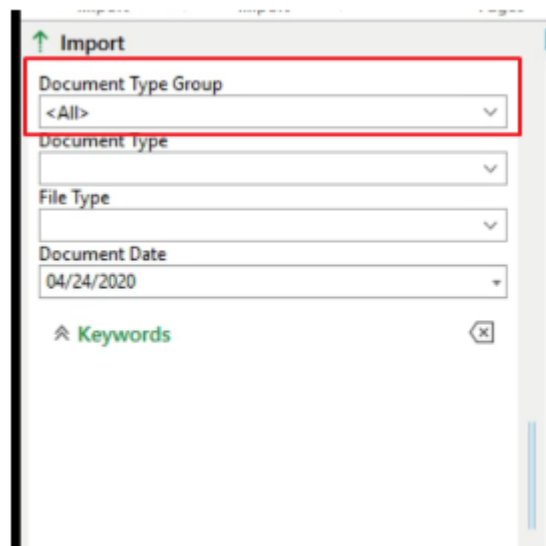
OnBase

Ad Hoc Upload (with Document Indexing)

- ▶ Log into the Unity Client
- ▶ Click the **Import** button in the Home ribbon:



- ▶ Select a **Document Type Group** to upload from the dropdown menu:



- ▶ Select a **Document Type** value associated with the document type group from the dropdown menu:



↑ Import

Document Type Group
STUDENT

Document Type
STU Waiver

File Type

Image File Format

Document Date
06/02/2020

Keywords

Znumber

First Name

Last Name

Middle Name

Options

↑ Import

✕ Cancel

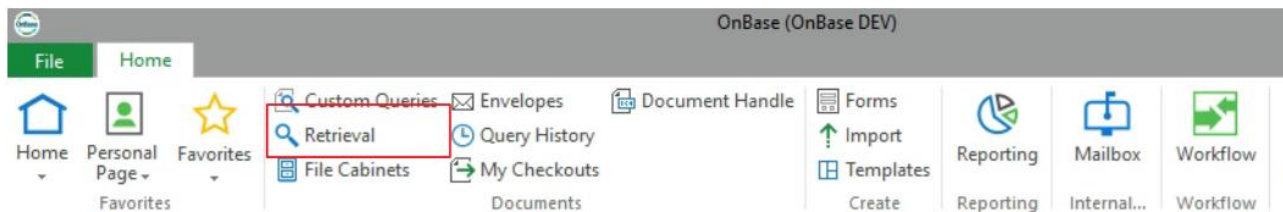
- ▶ Enter the **required** and desired keywords
- ▶ Click the **Browse** button on the ribbon, and navigate to a desired document
- ▶ Click the **Import** button. The document has now been stored in OnBase

Document Viewing

OnBase

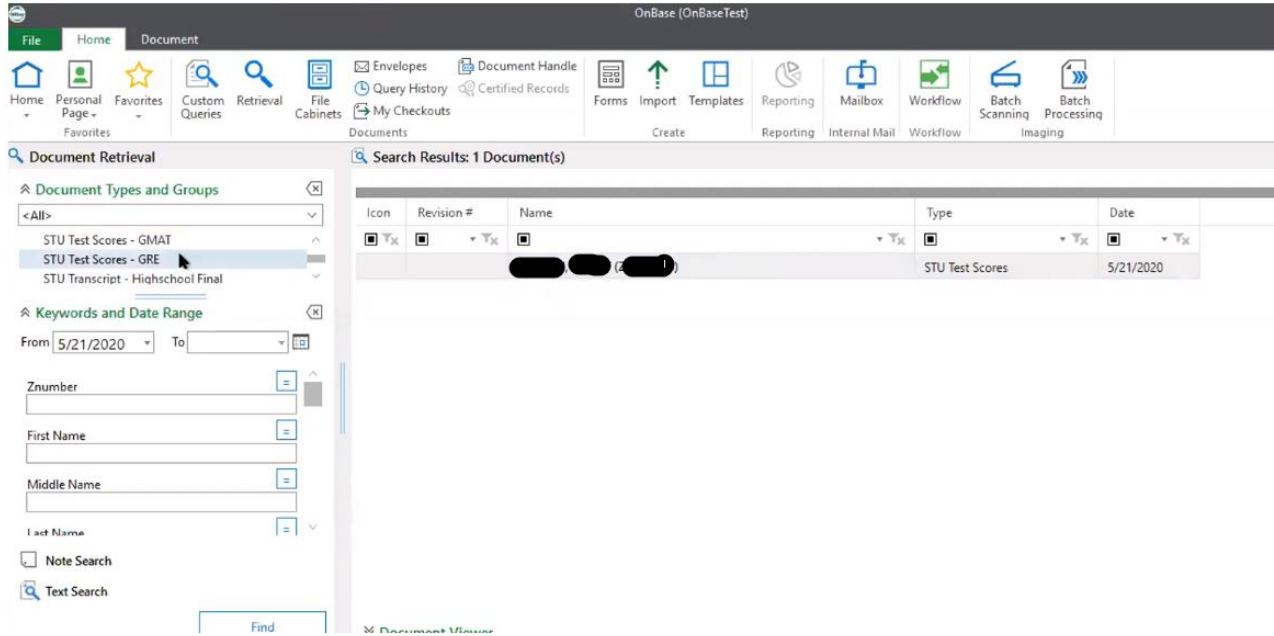
Ad Hoc Retrieval

- ▶ Log into the Unity Client
- ▶ Select the **Retrieval** button on the main ribbon:



- ▶ In the Document Retrieval panel on the left, select a Document Type and any search criteria to limit your query. Select "Find":

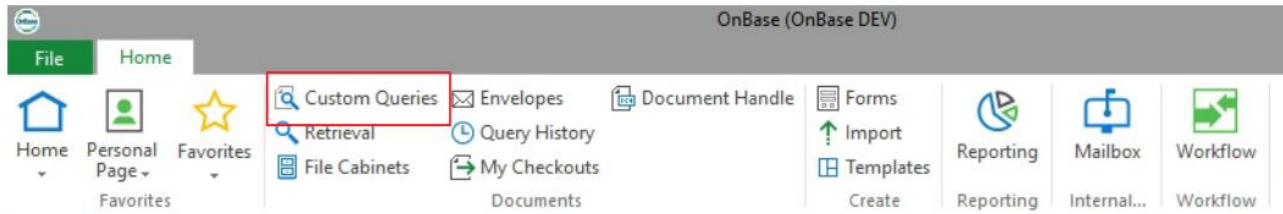
▶ Search Results will appear in the main panel in center of screen:



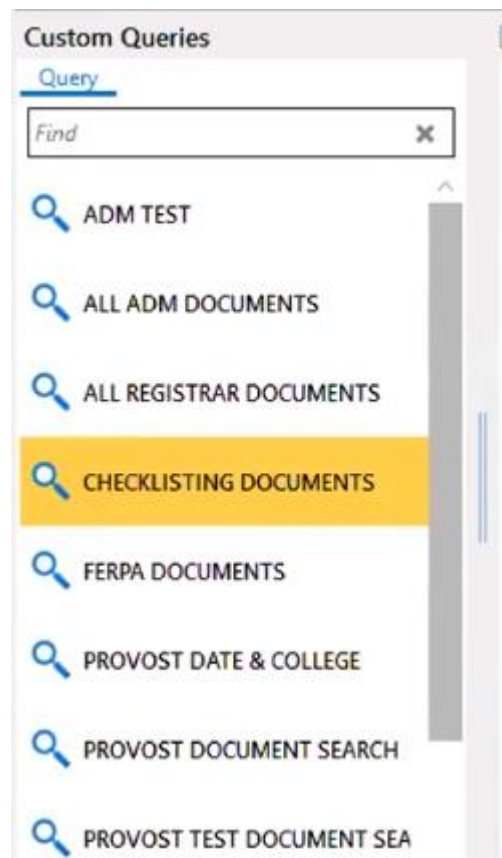
▶ Double click on a document to view it in a pop-out viewer

Custom Query

- ▶ Log into the Unity Client
- ▶ Click on the **Custom Queries** button in the main ribbon:



- ▶ Select the “Checklisting Documents” in the left-hand menu:



- ▶ Enter any search criteria and hit “**Search**”

CHECKLISTING DOCUMENTS

Search for Checklist Documents

Date Options

From To

Znumber

First Name

Last Name

Status

- ▶ To view an individual document, double click on an entry
- ▶ A separate viewer will pop up in the same way as for an ad hoc retrieval

Checklisting Workflow

The purpose of the Checklisting life cycle is to allow for processing of Checklist Documents from receipt in OnBase, through sending the Checklist Document Data into Snap Logic/Banner.

(SYS) Initial

This system queue handles the initial evaluation and routing of Checklist Documents. This is a timer based queue sets default keyword values and routes document for data validation.

General users do not have access to this queue.

(SYS) Data Validation

This system queue handles the data validation and routing.

OnBase evaluates the checklisting documents after every interaction and perform any necessary Data Validation. (Missing ZNumber, or Missing Information)

*Required keywords for the Integration are based on document type:

OnBase Checklist Document Type	Required Keywords
STU Waiver - Application Fee	ZNumber, Waived Reason
STU Transcript - High School final	ZNumber, School Code, Transcript Type, Source (paper, parchment), Graduation Date
STU Transcript - High School partial	ZNumber, School Code, Transcript Type, Official/Unofficial, Source (paper, parchment)
STU Test Scores	ZNumber, Test Type, Official/Unofficial
STU Test Scores - GRE	ZNumber, Test Type, Official/Unofficial
STU Test Scores - GMAT	ZNumber, Test Type, Official/Unofficial
STU English Proficiency	ZNumber, Test Type, Official/Unofficial
STU Recommendations	Znumber, Received Date
STU Tuition Deposit	Znumber, Received Date, Waived Reason
STU Transcript - Post Secondary	ZNumber, School Code, Transcript Type, Source, Partial/Final
STU Credential Evaluation	ZNumber, School Code, Transcript Type, Official/Unofficial, Source (WES, internal)

General users do not have access to this queue.

Unmatched

This queue contains any Checklist Document that was not indexed with a ZNumber or was not a valid ZNumber.

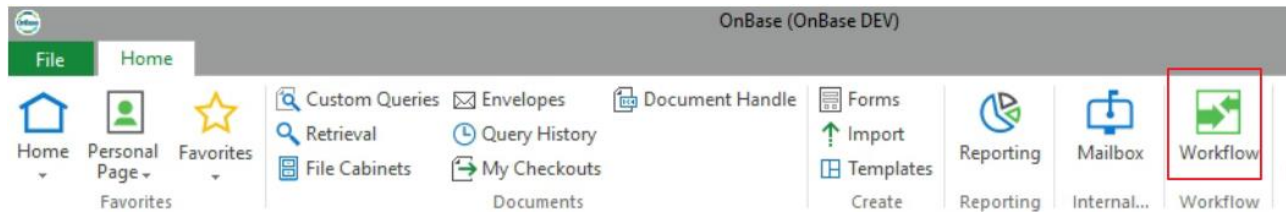
OnBase will add the Checklist Document to the OBS Partial Match Review life cycle for further processing.

Missing Information

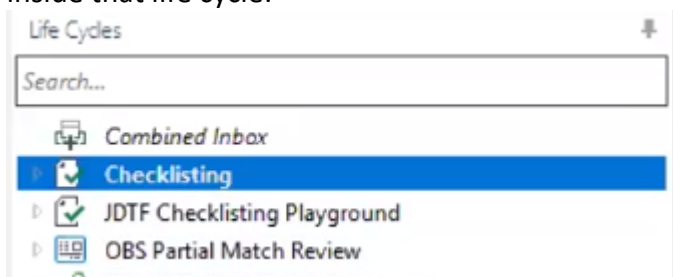
This queue contains any Checklist Documents that are missing any required data for a successful integration.

Users review the WF Error Keyword for missing keywords and resolve using buttons in the tasks menu.

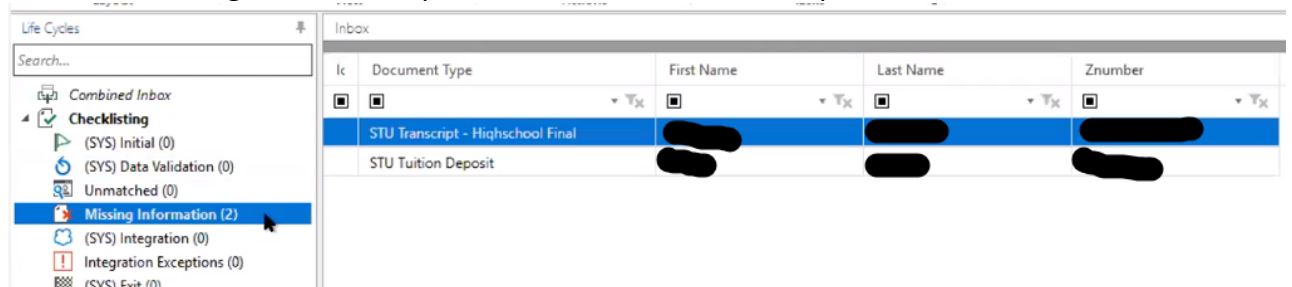
- ▶ Log into the Unity Client
- ▶ Click on the **Workflow** button in the main ribbon:



- ▶ Select the Checklisting life cycle from the left hand pane to expand and see the queues inside that life cycle:



- ▶ Select the Missing Information queue to see the items in that queue:



- ▶ Review each document in the Missing Information queue as necessary
- ▶ Users act upon the document using Ad Hoc tasks available across the top ribbon:



- Re-Index
 - Re-index the document type and/or keywords
 - Reprocess
 - Recheck against (SYS) Data Validation
 - Cancel and Remove from WF
 - Remove the document from processing, but store in OnBase
- ▶ For each document inside this queue, the (SYS) Data Validation should have updated the **WF Error** to contain what is missing from the document

(SYS) Integration

This system queue calls the Checklist Document integration. This system queue is used to send the Checklist Document data information to Snap Logic/Banner.

On success, documents are removed from the lifecycle.

On failure, the **WF Error** Keyword is populated with an error message explaining the failure and the document is routed to the **Integrations Exception** Queue.

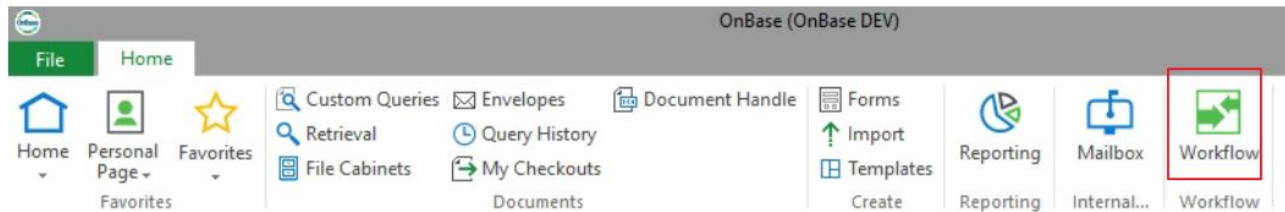
General users do not have access to this queue.

Integration Exceptions

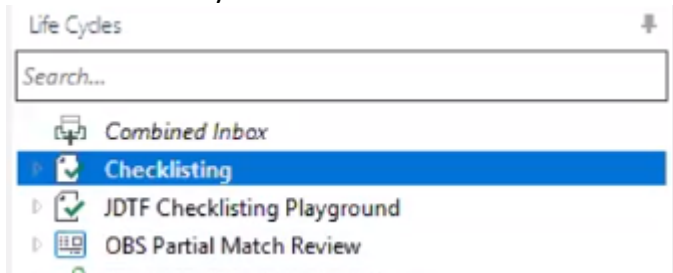
This queue contains any Checklist Documents that have received an integration error from the (SYS) Integration Checklist integration.

Users review each exception on the Document and take the appropriate action.

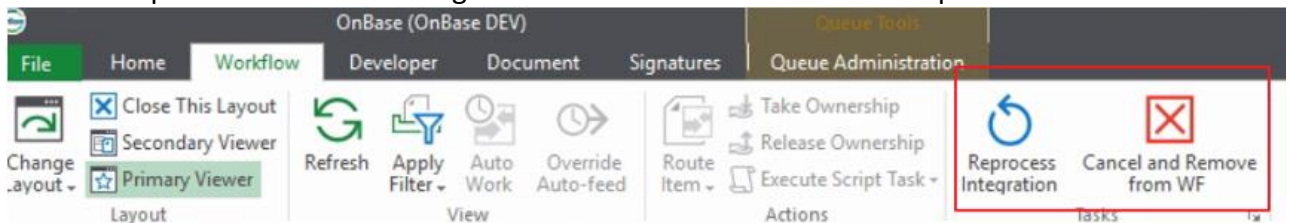
- ▶ Log into the Unity Client
- ▶ Click on the **Workflow** button in the main ribbon:



- ▶ Select the Checklisting life cycle from the left hand pane to expand and see the queues inside that life cycle:



- ▶ Select the Integration Exception queue to see the items in that queue
- ▶ Review each document in the Integration Exception queue as necessary
- ▶ Users act upon the document using Ad Hoc tasks available across the top ribbon:



- Reprocess Integration
 - Recheck against (SYS) Integration
- Cancel and Remove from WF
 - Remove the document from processing, but store in OnBase

(SYS) Exit

This system queue handles the final cleanup, and removal of the work items from the Checklisting life cycle.

General users do not have access to this queue.

OBS Partial Match Review Workflow

The purpose of the Partial Match life cycle is to assist in automating the matching of student documents to a student record.

The solution leverages information from Banner and Student Information indexed on the document to automate the matching process.

PM (SYS) Initial

This system queue handles the initial evaluation and routing of Checklist Documents. This is a timer based queue sets default keyword values and calls the Unity Script Integration.

The Unity Script Integration result returns Potential Match, No Match, or Integration Error.

General users do not have access to this queue.

PM No Match

This queue contains any Checklist Documents that received a No Match Integration result from the PM (SYS) Initial.

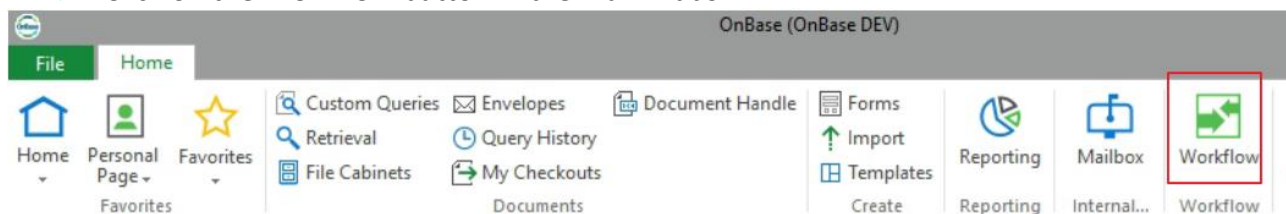
Users can review and act upon the document as needed. OnBase workflow will also reprocess the Unity Script integration nightly.

PM Partial Match

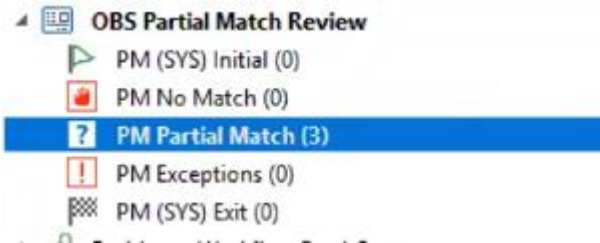
This queue contains any Checklist Documents that have been identified as having a Potential Match in the Solution.

Users review the Potential Matches and applies matches as necessary.

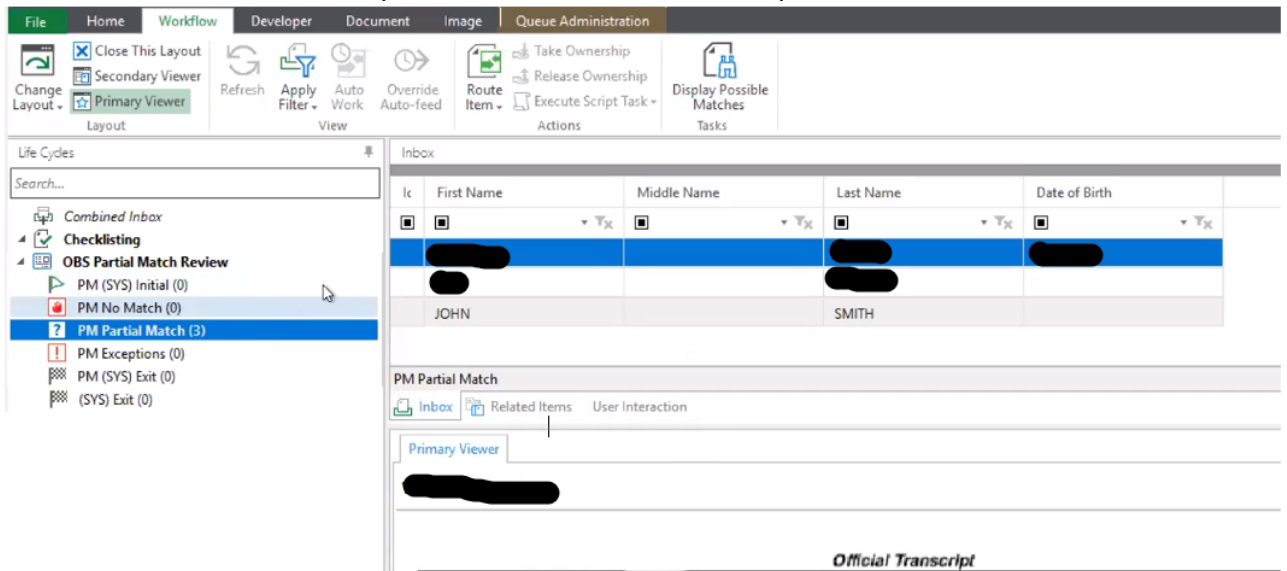
- ▶ Log into the Unity Client
- ▶ Click on the **Workflow** button in the main ribbon



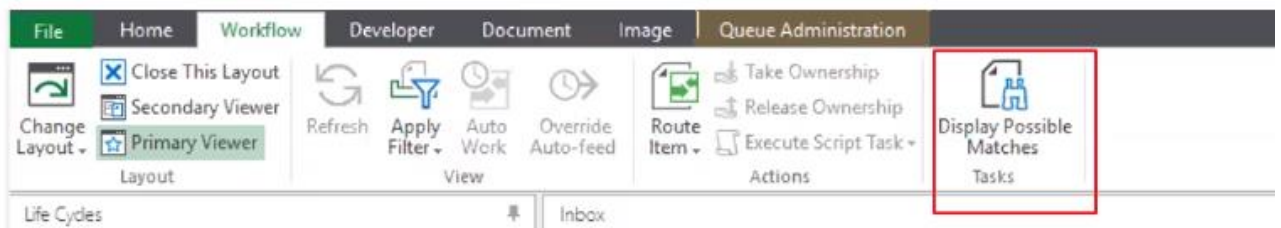
- ▶ Select the OBS Partial Match Review life cycle from the left hand pane to expand and see the queues inside that life cycle



- ▶ Select the PM Partial Match queue to see the items in that queue



- ▶ Review each document in the PM Partial Match queue as necessary
- ▶ Users act upon the document using Ad Hoc tasks available across the top ribbon



- Display Possible Matches
 - Will present the Users will a list of possible users OnBase Found in Banner

- ▶ You can select the Potential Match or say “No Match” if the Partial Match Applicant(s) are not a match

The screenshot shows a software interface window titled "User Interaction" with a sub-header "Partial Match Applicant(s)". Below the header is a table with the following columns: ZNumber, First Name, Middle Name, Last Name, Date of Birth, Preferred First Name, and Alter Nam. The data rows in the table are redacted with black bars. Below the table, there are two radio button options: "Z" and "No Match".

PM Exceptions

This queue contains any Checklist Documents that have received an integration error from the (SYS) Initial Partial Match Unity Script integration.

OnBase Admin review each exception on the Document and take the appropriate action.

(SYS) Exit

This system queue handles the final cleanup, and removal of the work items from the Partial Match Review life cycle.

General users do not have access to this queue.