

InfoEd/OnBase Integration: Operational Overview

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InfoEd/OnBase Integration

- OnBase
- InfoEd PD documents exporting into OnBase
 - Categories and naming conventions in InfoEd
- Departmental access to OnBase through InfoEd
 - Confidential documents
 - Historical documents



What is OnBase?

- Electronic content management system
- Institutional documents are stored and retrievable in OnBase
- OnBase is the institutional system of record
 - Auditable
- Currently, access limited to OSR and ASRSP
- Implemented for OSR/ASRSP use in 2012

InfoEd PD documents exporting into OnBase

There will be a one time exportation of documents from InfoEd PD into OnBase

- Exports will occur automatically and at a regular frequency, but will occur only once for each proposal in submitted status*
- All files uploaded into Internal Documents will feed into OnBase with the following exceptions:
 - The proposal routing form (will be manually added into OnBase by OSR)
 - Document types designated not to pull into OnBase (e.g. draft technical documents)

* Some proposals will go straight into awarded/prespend status, and the feed into OnBase will occur then.

- Categories and naming conventions in InfoEd
 - The category in InfoEd will determine document type in OnBase

The image shows two overlapping windows. The background window is the 'Upload' interface in InfoEd, and the foreground window is the 'Import From Virtual Printer' dialog in OnBase.

InfoEd Upload Interface:

- Upload new document**
- Name: [Text Field]
- Location: [Browse...] No file selected.
- Category: [Dropdown Menu]
- Folder: [Dropdown Menu]
- Add Initial**
- Form Name: [Text Field]
- Type: [Text Field]

OnBase Import Dialog:

- File Path: 1Base Printer Spool\DE7E7FE94E80B74B94C41EB16C077389.tif
- Append Page To Existing Document
- Delete File After Import
- Initiate Workflow
- Document Type Group: OR - Research
- Document Type: OR - OSR Activation Notice
- File Type: [List of document types]
- Document Date: [Text Field]
- Keywords: [Text Field]
- Import button

A blue arrow points from the 'Category' dropdown in InfoEd to the 'Document Type' dropdown in OnBase. A red arrow points from the 'Agreement' option in the InfoEd 'Folder' dropdown to the 'OR - OSR Activation Notice' option in the OnBase 'Document Type' dropdown.

- Categories and naming conventions in InfoEd
 - The name in InfoEd will determine the short description in OnBase:

The screenshot illustrates the relationship between the name entered in InfoEd and the resulting document title in OnBase. In the InfoEd 'Upload' window, the 'Name' field is set to 'QN Presentation'. The 'Category' dropdown menu is open, showing 'OSR Solicitation' as the selected option. In the OnBase 'Document Search Results' view, the document title is 'SP0054321 - OR - OSR Solicitation - QN Presentation'. A blue arrow points from the 'Upload new document' link to the 'Name' field. A red arrow points from the 'Name' field to the 'QN Presentation' part of the document title. A blue arrow points from the 'OSR Solicitation' part of the document title to the 'OSR Solicitation' category selected in the 'Category' dropdown menu.

Note also that the document type in OnBase (determined by the category selected) is also shown in this view

- Categories and naming conventions in InfoEd
 - Consistent use of InfoEd categories and naming conventions will be essential to ensure that OnBase remains a navigable resource
 - Inaccurate categorization in InfoEd leads to inaccurate filing in OnBase, which will need to be manually corrected by OSR
 - Inconsistent or unhelpful document naming will make finding documents in OnBase much more difficult

OSR will provide guidance in the form of standard operating procedure documents (SOPs) for categorization and naming conventions in InfoEd

OSR will also follow standard conventions for items directly uploaded into OnBase

Departmental access to OnBase through InfoEd

- Departments will now have access OnBase (based on current InfoEd security access)
- To access the relevant OnBase record a direct link will be provided in the PT record in InfoEd
- If you don't have access to a given record in InfoEd, you will not have access to that record in OnBase



- Confidential documents
 - Certain documents will be marked as confidential in OnBase and will not be visible to departments
 - Some document types in OnBase will default to confidential
 - Other document types will be set as confidential at OSR's/ASRSP's discretion



- Historical documents
- Departmental access to historical documents will be relatively limited
 - During the transition to OnBase hard-copy files were uploaded using “bulk scans” - these may contain confidential information
 - There were few standard procedures for uploading documents into OnBase prior to this point, so it is possible that confidential information could appear in any number of document types

These facts naturally lead to a conservative approach regarding historical documents in which many, if not all, documents uploaded prior to the InfoEd/OnBase integration could be marked confidential

- Looking forward

Questions?

