OnBase Rollout at UC San Diego
What is OnBase?

OnBase is a document management system used by multiple campus units to store documents, images, and other files in a cloud service. OnBase enables scanning, storage, and retention of documents as well as automated organization, indexing, and retrieval of electronic files. It will help manage and process document-driven workflows by routing documents to queues designed for specific needs.

Staff

Currently part-time – Project Manager, Business Systems Analyst, Trainer, Service Owner

Planned full-time – Config Admin, Data Admin, Workflow Dev, Business Systems Analyst, Service Owner

Deployment Plan

Centralized Enterprise Administration, Distributed Management, Train-the-Trainer, Governance-controlled Service... highly integrated with other Enterprise Services where necessary and possible.
OnBase Implementation Phases

Phase 1 – Enrollment Management Migration

Kick off EDMS
- Partner with Policy & Records Administration
- Engage Enrollment Management
- Engage Research Service Core

Enrollment Management Migration
- EM Migration and User Acceptance Testing
- Launch Enrollment Management in Production
- Integration Development – iPaaS for RSC

Phase 2 – Research Service Core Migration

Research Service Core Migration
- Develop Governance Committee
- Engage RSC for Migration
- Kuali COI integration
- Kuali Research integration
- Data source and target reprogramming – iPaaS
- Research Service Core User Acceptance Testing

Phase 3 – Policy & Records Administration Migration

PRA Migration
- Documentum
- Kofax / Liquid Office
- Internal Processes

PRA Integration
- Training Partnership
- Campus Consultation
- Service Partner
- External Services
- University Archives

Phase 4 – Service Development

Targeted Projects – TBD by Governance Committee
- OnBoarding Process
- APOL Remediation
- Knowledge Lake
- Academic Senate
- Blackbaud
- Health HR
- School of Medicine
- Medical Center
- Real Estate
- Capital Planning
- Contracts and Grants
- Student Travel Systems

Phase 5 – General Availability

Service GA
- Prioritized Projects
- OnBoarding Process
- Lean Six Sigma
- Training
- Documentation
- Community of Practice
- Support Model
- Change Management
- Implementation
OnBase Enterprise Document Management Service

Nexus (Team) Services
- Enrollment Management
- Research Service Core
- Policy & Records Administration
- Student & Faculty IS
- PMCI & OSI
- Resource Management
- Advancement

Current
- ESR Services
  - UC Path
  - Tririga RES
  - APOL & AP Next
  - Slate
  - Kuali COI
  - Kuali Research
  - Oracle Financials
  - Student Information System

Priority 1
- Enterprise iPaaS integrations

Priority 2
- Onboarding new team processes

Priority 3
- Managed migrations and expansions

Unit Services
- iDocs
- Worldox
- Knowledge Lake
- Academic Senate
- Blackbaud
- Health HR
- UCSD Extension
- Paper Digitization Services
OnBase Adoption Onboarding

Do you have an existing document management system?

Do you have a designated staff member to lead the transition of processes into OnBase? This individual will become your department’s OnBase manager and subject matter expert.

Has your work-flow or document-management process gone through business process optimization using Lean Six Sigma or other process improvement methodologies?

Do you have a migration project manager (if not, please contact IT Services Project Management Office, campus Office of Strategic Initiatives or Program Management and Business Integration) and has your project been scoped?

Have you consulted with Policy & Records Administration on your required document retention needs?

Do you have a list of individuals who will be dedicated to the business process(es) and who will receive appropriate training(s) in OnBase?
# Onbase Support Model

## Technical Support and Escalation Paths

<table>
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<th>Tier 0</th>
<th>Tier 1</th>
<th>Tier 2</th>
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<td><strong>Self Service</strong></td>
<td><strong>Process Lead</strong></td>
<td><strong>Snow Tech Support</strong></td>
<td><strong>Service Support</strong></td>
<td><strong>Vendor Support</strong></td>
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### End Users:
- Access resources themselves:
  - Blink Sites
  - Knowledge Base
  - Hyland Training
  - Instructor-led Training
  - WalkMe Support

### Subject Matter Experts (SMEs)
- SMEs, departmental process experts, owners, and managers provide guidance & help answer questions
- Need help? End user requests assistance

### Agents:
- Triage case/ticket and either:
  - Resolve
  - Redirect
  - Escalate to functional tier or technical tier 3

### Agents:
- Manage escalated case
- Answer service management or technical and functional questions and either:
  - Resolve ticket
  - Redirect ticket
  - If an issue with the product, escalate to tier 4.

### Vendor:
- Addresses issues with the product
- Resolves issues related to service
- Product engineering support
- Professional services consulting where needed

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OnBase by Hyland
Where you can find more information

https://edms.ucsd.edu