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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:

- 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”
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:

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

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.

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► 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.

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► 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.

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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 with 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.

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.