OnBase Overview
Electronic Personnel Files

THE OHIO STATE
UNIVERSITY

Contents

Introduction

OnBase is the university's contracted electronic document management system (EDM) used for the secure storage of electronic personnel files. Implementing an electronic personnel record process ensures:

- A consistent, sustainable, and secure central warehouse for personnel records
- Reduction of university risk
- Savings from ink, paper, file folders, and space
- Time savings from reducing old manual processes
- Ease of access and response to audits and public records requests

Image from www.onbase.com - 1

This tool provides a great deal of information on getting started using OnBase for electronic personnel records. Here are a few helpful tips for navigating this guide:

Buckeyes are Green! Keep this guide as an electronic document in order to utilize the hyperlinks and easily navigate from place to place.

Red Buckeye Leaves throughout the guide indicate helpful tips and best practices.

Common abbreviations and terms:

- EDM = electronic document management (system)
- VPN = virtual private network
- Name.# = your OSU username
- Shibboleth password = password associated with your name.#

Access OnBase

OnBase requires Ohio State users to be connected to a VPN, Cisco AnyConnect Secure Mobility Client. In order to connect to the VPN, users must also be enrolled in BuckeyePass. Once connected to the VPN, the user will be able to connect to OnBase via either the desktop or web client.

BuckeyePass

BuckeyePass is a multi-factor authentication service, which provides a second layer of security to your Ohio State account. In order to authenticate, it requires something you know (your password) and something you have (a mobile device or phone). We recommend installing the Duo Mobile app on a smartphone or tablet.

Access: Enroll as a new user in BuckeyePass at http://buckeyepass.osu.edu.

Cisco AnyConnect Secure Mobility Client

The Cisco AnyConnect Secure Mobility Client will provide access to the university's EDM VPN.

Access: Contact OCIO support at 8-HELP (614-688-4357) to install Cisco AnyConnect. (Some areas have unit-specific IT teams that will need to be contacted instead.)

OnBase

OnBase is the system where users will actually import, index, and retrieve electronic personnel records. OnBase is secure enough to house restricted data, but users should be sure to only maintain documents with restricted data in the Controlled Access document types. OnBase is accessible on the web using Internet Explorer.

Access: Send an email to access@osu.edu.

Log on to OnBase

Connect to the Cisco VPN
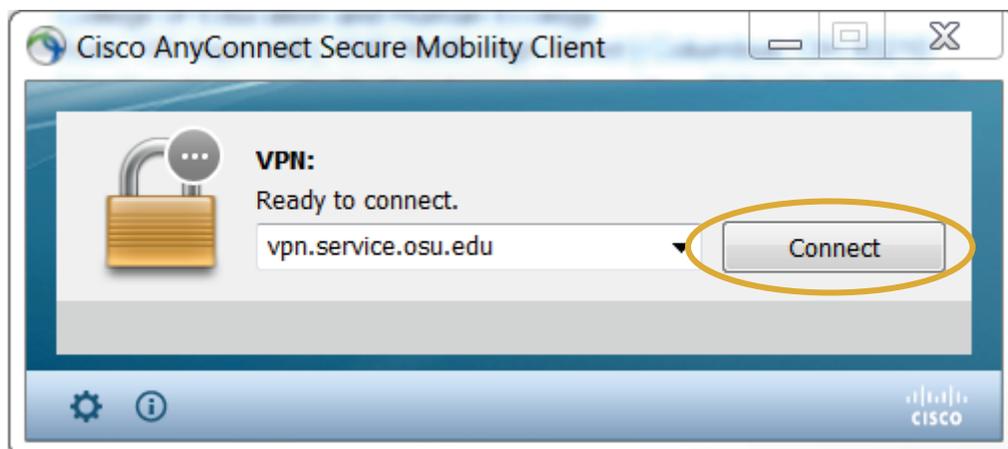
1. There are two ways to navigate to Cisco:
    a. From the Start menu on your computer, click on All Programs, go to the Cisco folder, and then choose Cisco AnyConnect Secure Mobility Client. You can also search for 'Cisco' in the search bar.

       -OR-

    b. Select the Cisco icon from the hidden icons option on your toolbar:
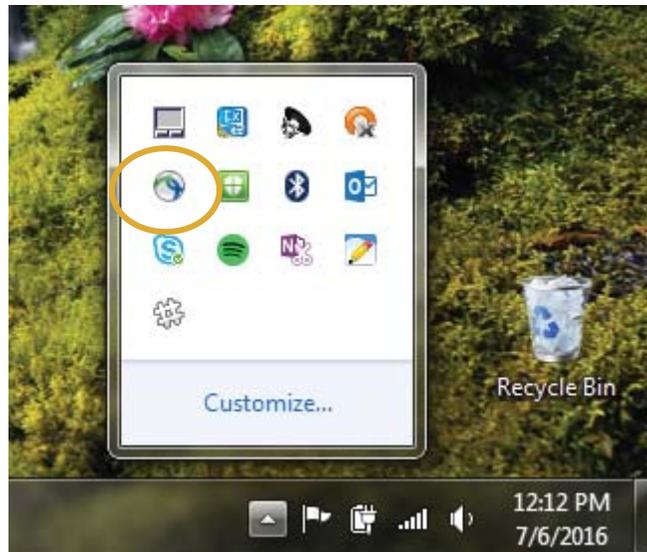
2. Verify that the option you're seeing is vpn.service.osu.edu and click Connect:


3. A new window will pop up:

Cisco AnyConnect | vpn.service.osu.edu

Please enter your username and password.

Group:	EDM-Access ▼
Username:	buckeye.1
Password:		
BuckeyePass Method/Code	

OK   Cancel

The **Group** should be "EDM-Access."

Username is your name.#

Password is your shibboleth or PeopleSoft password.

BuckeyePass Method/Code is the number displayed when you open the Duo Mobile app on your phone and click on the green key.

DUO

Edit   +

Check out these new features!

O Ohio State University   🔑

Tap here for help
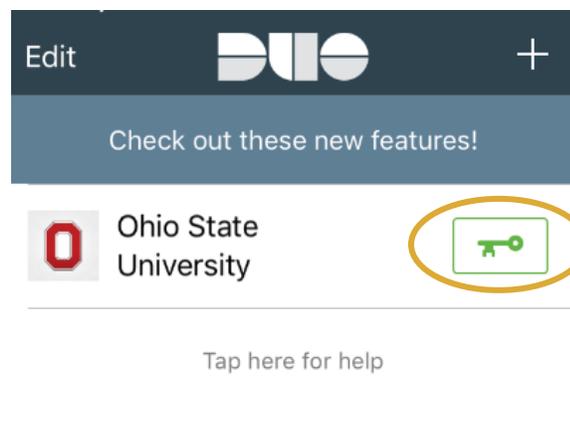
🍁 The first time you connect to the Cisco AnyConnect VPN, you will more than likely have to change the "Group" in the dropdown menu to EDM-Access. After the first time you sign in, it should default to EDM-Access going forward.

Cisco AnyConnect | vpn.service.osu.edu

Please enter your username and password.

Group:	DS-ACCESS ▼
	DS-ACCESS
Username:	DS-ACCESS-DC-ONLY
	EDM-Access
Password:	OSULAN
	OSUnet
	OSUnet-SECURE

OK   Cancel

4. Click Accept:

Launch OnBase

Once you're connected to the VPN, launch **Internet Explorer** and go to: https://edmosu.it.ohio-state.edu/AppNetVpn/Login.aspx
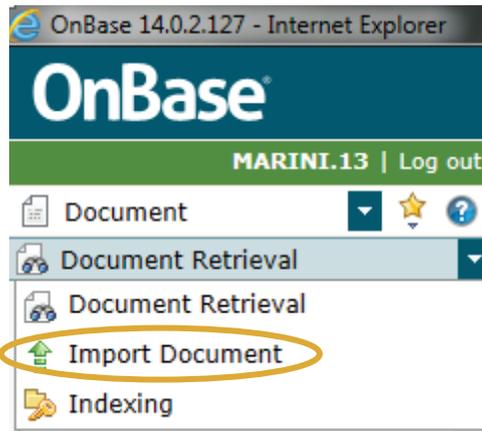
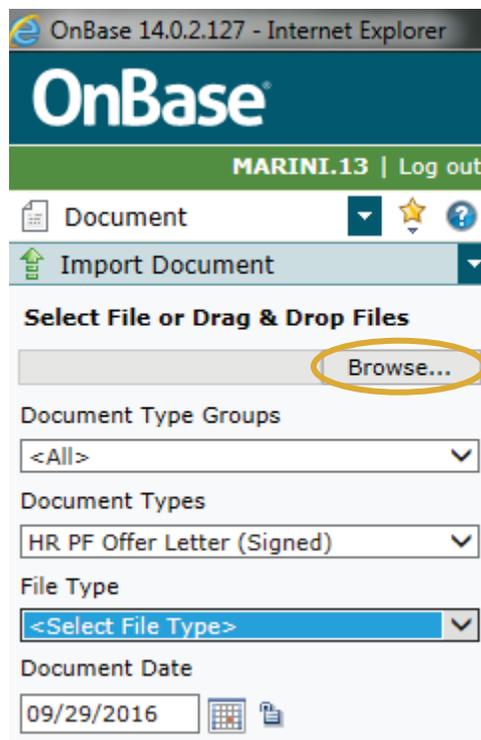Login with your name.# and shibboleth password.
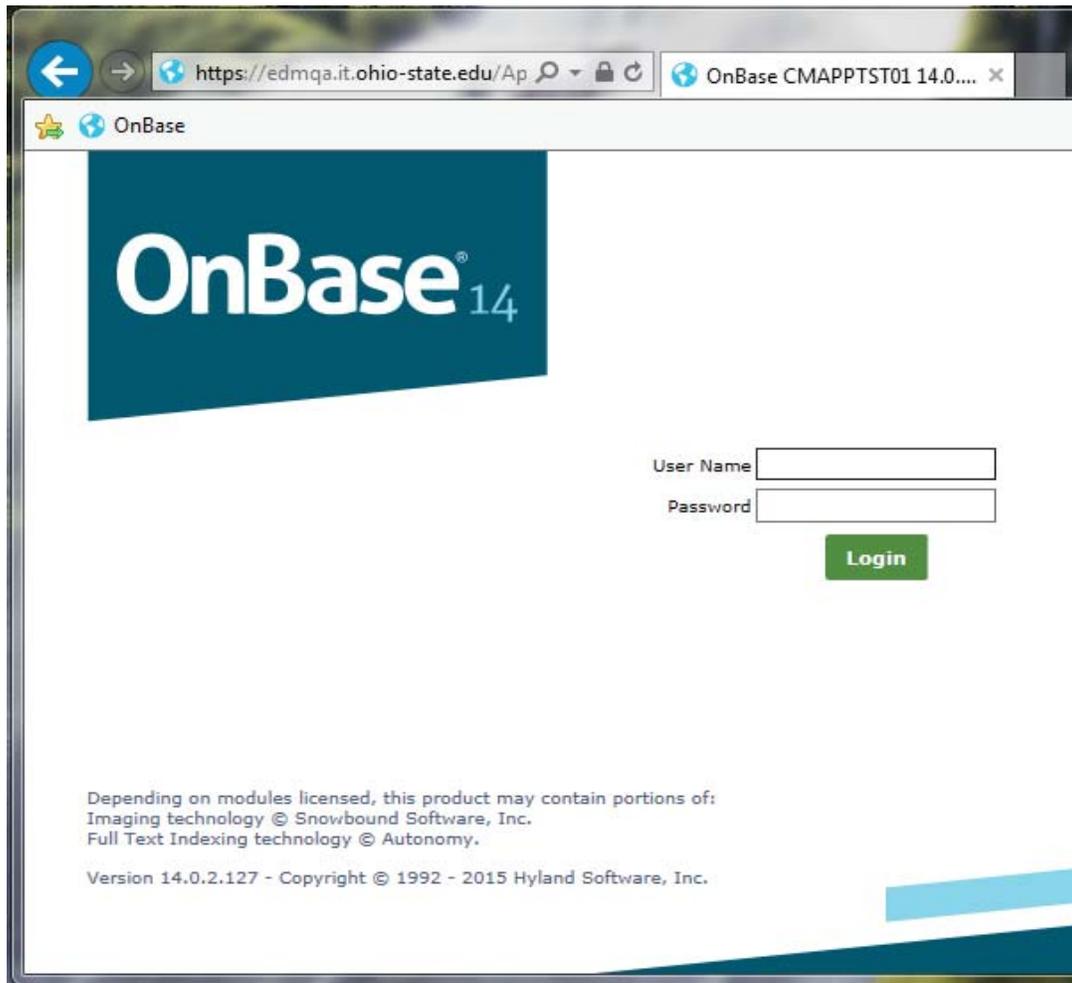
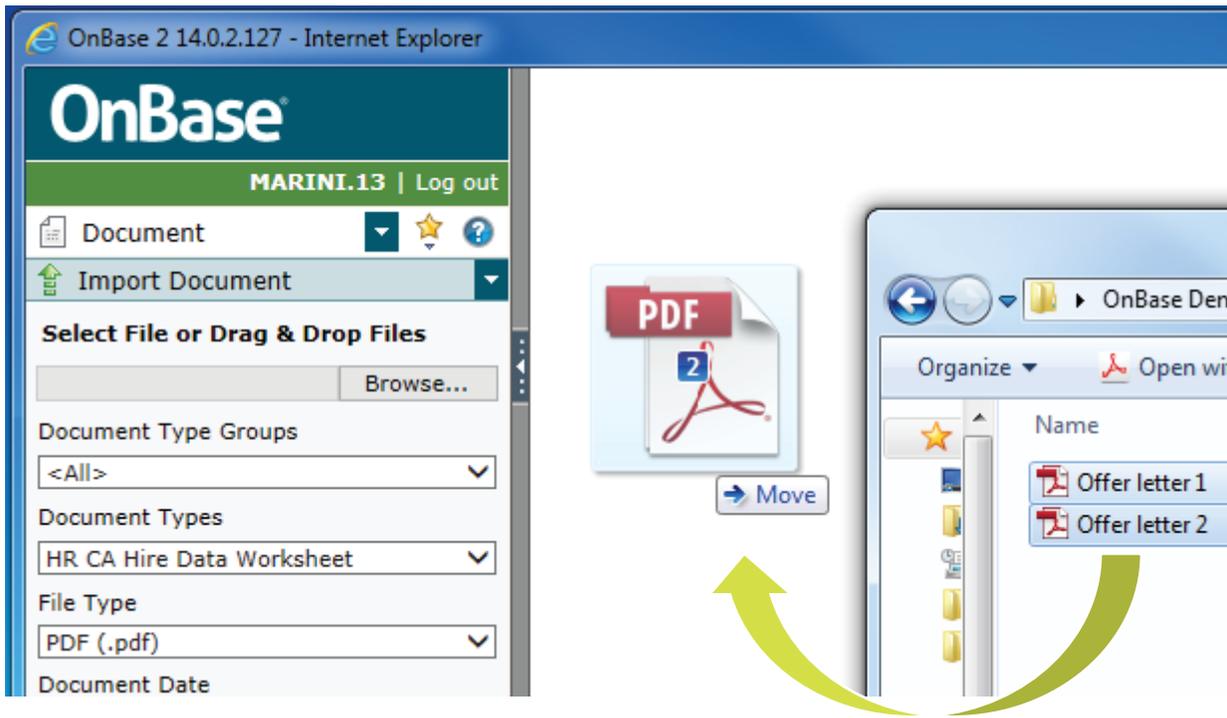❀ Your username will always appear to be in caps lock.

Import Documents

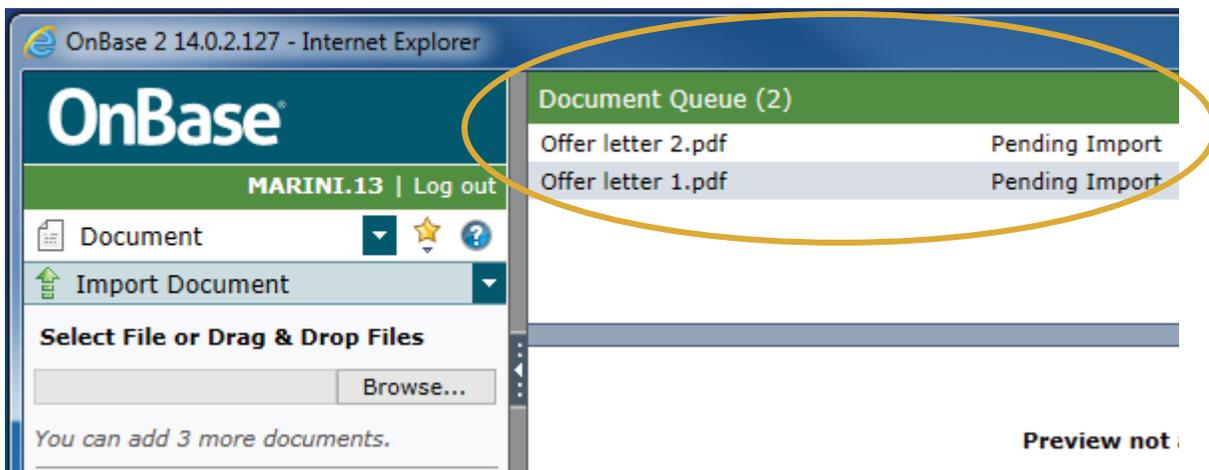1. Click on the down arrow next to Document Retrieval and select Import Document.

2. Select Browse… and navigate to the folder where your employee's document is located. Select the file you want to import.

You can also drag and drop single files or multiple files onto the import screen as shown below.

Drag your files onto the preview screen in OnBase from the folder.

When you drag multiple files, you will see a queue at the top of the window.

3. Fill out relevant information.
   - Document Information

Offer letter 1.pdf
☑ Show Preview
Document Type Groups
`<All>`
Document Types
HR PF Offer Letter (Signed)
File Type
PDF (.pdf)
Document Date
10/19/2016
Keyset Lookup
Student_Bio

Select the appropriate Document Type from the dropdown list.

The File Type will automatically default to the type of file you're importing.

🍁 The Document Date defaults to the date that you are uploading the document to OnBase. It's highly recommended you update the Document Date to reflect the actual date of the document.

   - Keywords
       - When the Employee ID is typed in, all other employee information will populate automatically if the person is an active employee.

EMPLID

Name.N

Last Name

First Name

Any Keywords that are red are required fields.

       - Scroll down in the keyword list to reveal more fields.

Date of Birth

MM/dd/yyyy
Personnel Type

Description

Some Document Types have specific keywords available.

Description is a freeform field that allows you to further identify the document.

4. Once you are satisfied with all of your keywords, click the Import button in the bottom left-hand corner.

Import ← <image> → Clear Imported Documents

Clear Keywords ← <image>

Clear All → <image>

Cancel Import → <image>
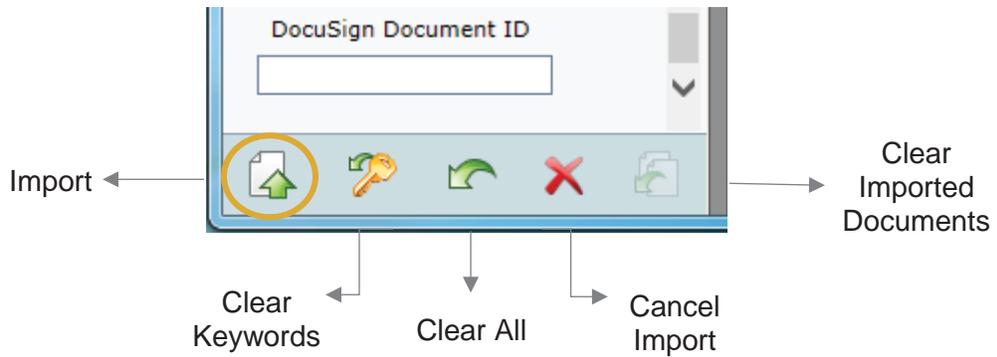
5. You will see the status of each document change from Pending Import to Imported Successfully as you index all of the files in your Document Queue.

6. You can view your imported documents by navigating to Document Retrieval described below.

Retrieve Documents

1. Make sure Document Retrieval is selected from the dropdown list as shown below.
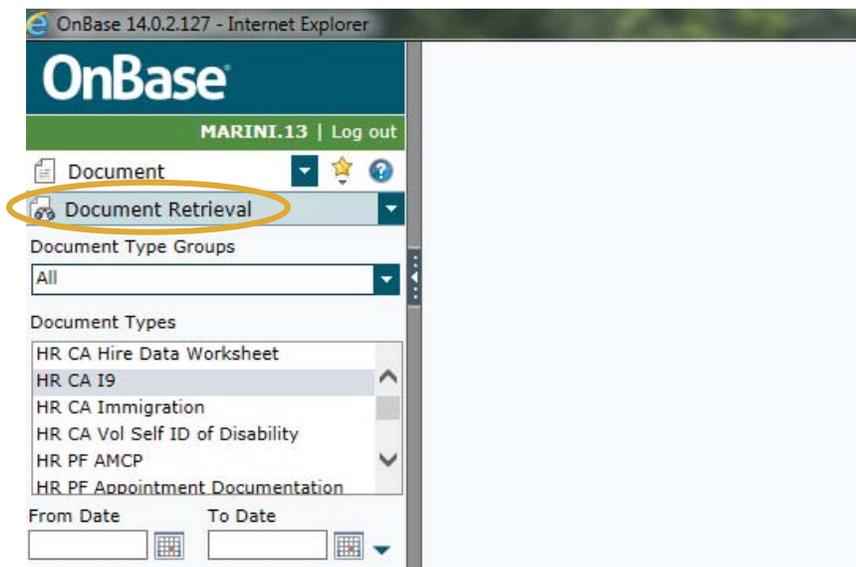
2. Select the Document Type you are searching for and enter an employee ID. **You must have a document type selected before you enter any search parameters.** You may also search by the other fields such as Name.N, Last Name, and/or First Name if you don't have the employee ID handy.

3. Click the binoculars in the bottom left-hand corner to search.
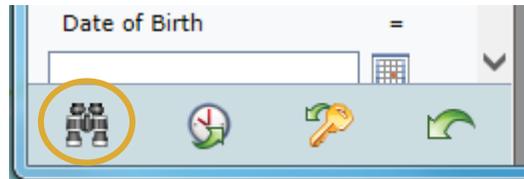
🍁 If you select another document type, you will have to re-enter any keywords you're searching by.

4. If you would like to see an employee's entire personnel file, click and hold on the first document type and drag your mouse down the entire document type list and then follow the same steps above. **You won't be able to see all of an employee's files without selecting all of the document types.**


🍁 Making a large selection may cause significant delays in retrieval.

Document View Panel

Viewing Documents
Once you have retrieved a document or multiple documents, you can view one by double clicking on it in the document list (noted by the callout bubble above).

If you would like to view a document in a separate window, right click on a document in your document list and select Open in New Window.
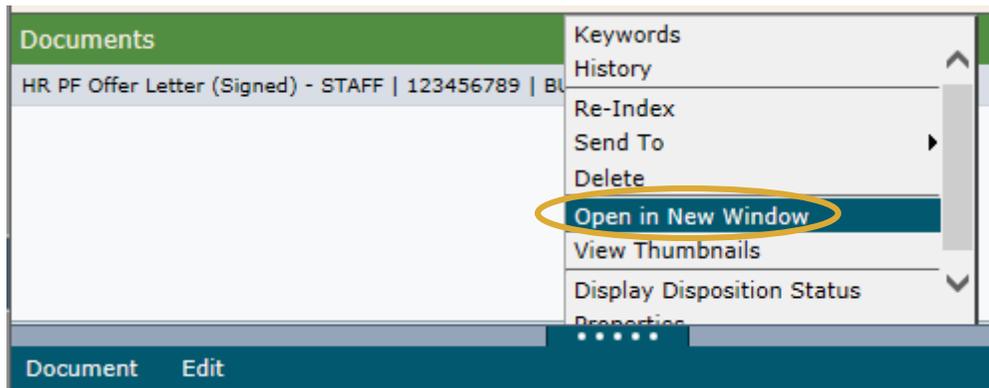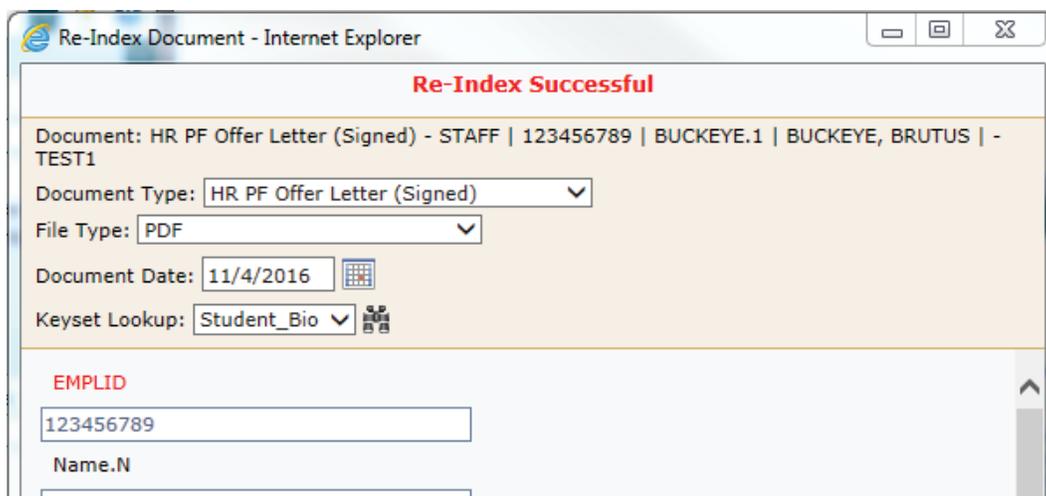
Re-Index Documents

If you need to change a document type or edit any keywords, you can either select Re-Index from the right-click menu in your document list, or you can click Re-Index in the Edit menu that appears in the dark teal toolbar above the document preview window.
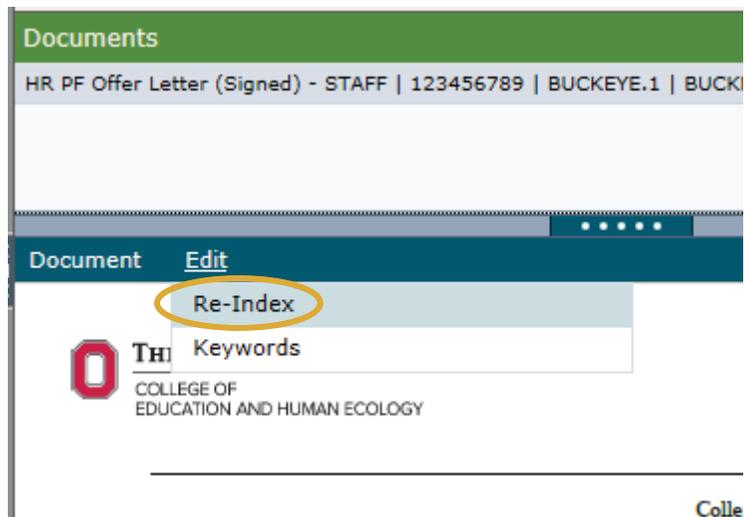

A new window will pop up allowing you to edit the document type, date, and any keywords you need to. Click Re-Index at the bottom when you are done. At the top of the Re-Index window you will see a message that says "Re-Index Successful." You can click Close once you are done.

Document History

Document history is a comprehensive log of every action that has occurred in relation to a document. You can see who imported, indexed, re-indexed, and even viewed each and every document in OnBase.

You can access document history from the right-click menu in your document list, or you can click History in the Document menu that appears in the dark teal toolbar above the document preview window.
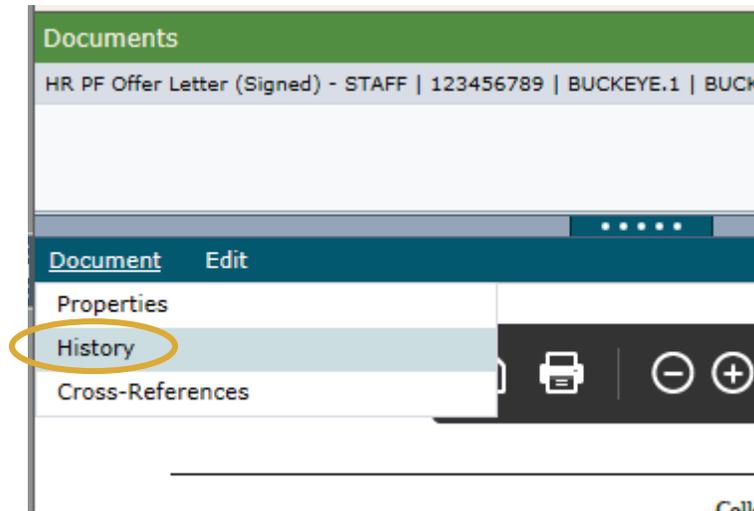

A new window will pop up displaying every action pertaining to the document you selected.
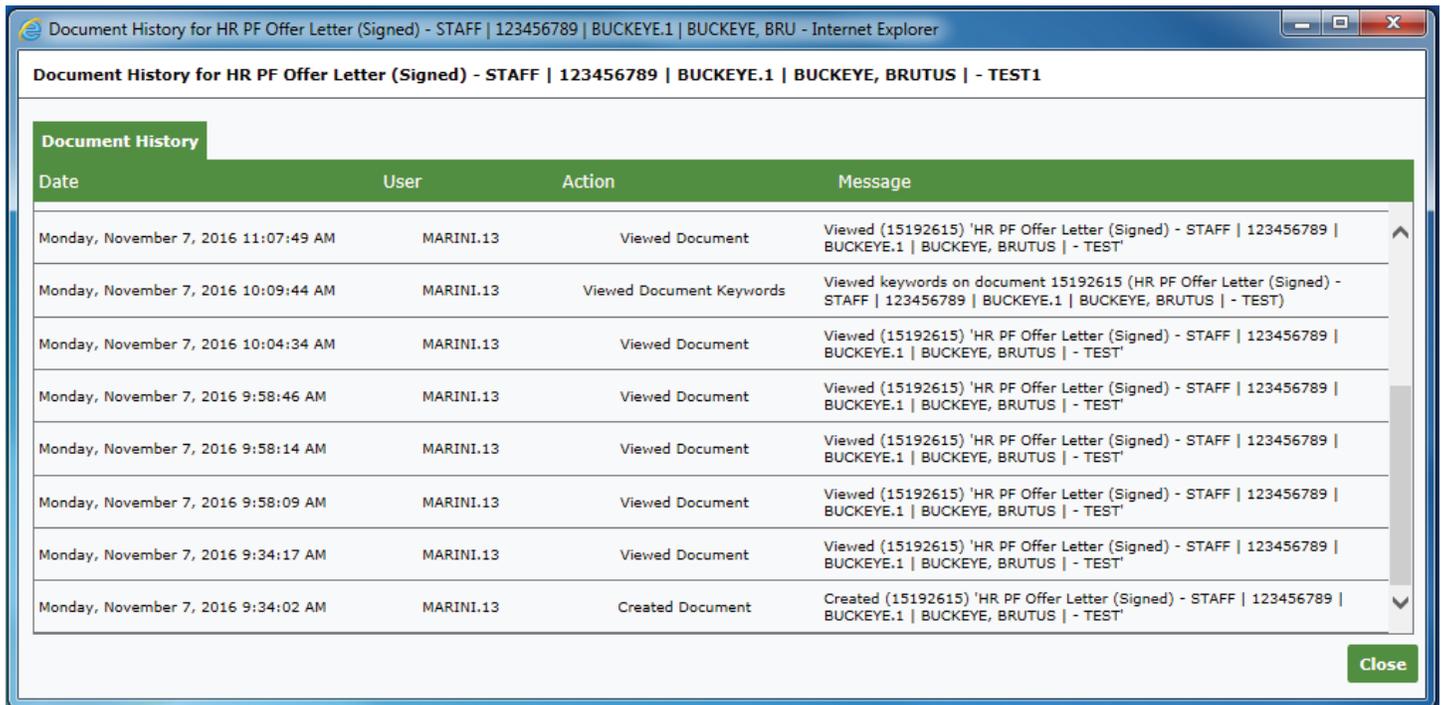
Saving and Printing Documents from OnBase

You may have noticed that the Adobe menu pops up every time you hover over the document preview window. Clicking on the save button will open a Windows Explorer menu allowing you to save a document anywhere on your computer in the event that you need to provide an electronic copy. Likewise, you can also click the printer button to pull up a print menu.
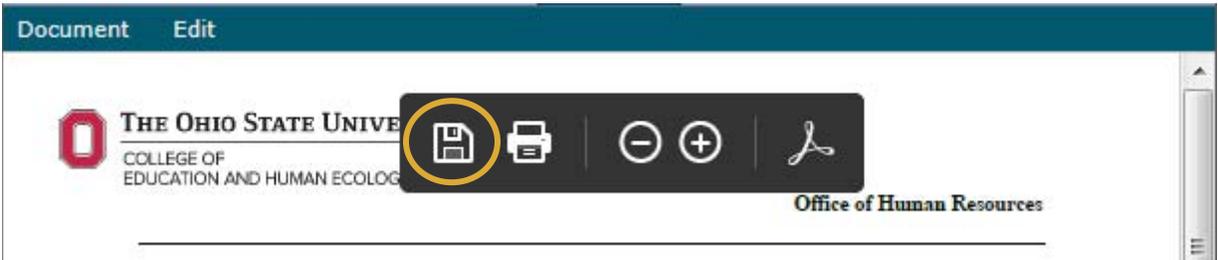
Clicking on the Adobe logo in the menu will open up the Adobe Reader program within OnBase, giving you the capability to view the document thumbnails, zoom in and out, search text within the document, and even email the document directly from OnBase.