Customer Success Story | Higher Education

University of Richmond

Legacy conversion from Nolij Web to OnBase provides an enterprise foundation

The Challenge

Working with a legacy document management system that had little stewardship, the University of Richmond needed a system to provide enhanced workflow and record retention capabilities.

As business operations matured and the demand for more sophisticated processes grew, Richmond realized it needed an enterprise solution that could solve today's challenges and grow to meet any future demands.

That's when it discovered OnBase by Hyland.

The Solution

Enabling a smooth and easy conversion process

Many departments at Richmond relied on Nolij Web, including Advancement, AP, the Bursar's Office and HR. With this in mind, the University conducted a full discovery with each department before beginning the conversion. This enabled each department to determine university–approved retention requirements and strategic keywords that support document access beyond a single office. That way, when it began the conversion, only documents that fell within those requirements would be migrated to   OnBase— helping to improve compliance and minimize risk.

Using OnBase, Richmond created a tool to automatically identify existing document images within Nolij Web and then move over and categorize the documents that fell within the University's requirements. During this process, which on average required only a day of downtime, the University discovered and purged over 500,000 duplicate or unnecessary documents. The result? More than 380,000 required documents were categorized into OnBase and the University completely moved away from the legacy system in only 14 months.

**UNIVERSITY OF
RICHMOND**®

CUSTOMER
University of Richmond

INDUSTRY
Higher Education

SIZE
Five schools, 4,100 students

LOCATION
Richmond, VA

ONBASE INTEGRATIONS
Banner by Ellucian

DEPARTMENTS USING ONBASE CAPTURE
Accounts Payable
Accounting
Budget and Treasury
Bursar
Procurement
Human Resources
Payroll
Undergraduate Admissions
International Taxation

One platform **Unlimited potential**

OnBase®
by Hyland

Automating the undergraduate admission process

Modernizing the student application process was a high priority for Richmond, so it chose Undergraduate Admissions for one of the initial deployments of OnBase. Previously, the office printed and physically filed and organized every application, despite the widespread use of electronic application sources like Common Application. Staff would then pack up and ship all the applications to the appropriate offices across multiple schools for review.

With OnBase, all incoming applications are captured electronically, automatically sorted and stored in one central location. OnBase also integrates directly with Richmond's student information system (SIS), Banner by Ellucian, so when information is updated in one system it is updated in the other as well. This allows the Admissions staff to confidently work with the most up-to-date information available, regardless of the line-of-business application they are in.

Most importantly, OnBase allows offices from any school to access the complete application electronically, so the University no longer spends time manually filing and shipping documents to complete the review process.

Providing a foundation to build on

With OnBase, Richmond now has a solution with true enterprise capabilities that can expand to other departments on campus. It also enables it to deploy new processes and workflows quickly, without draining IT resources.

"We were able to create a workflow for the Procurement department that actually compares data in Banner to OnBase to see if any backup data for purchase orders or invoices is missing," said Chapman. "If any documentation is missing, management receives an email so everything is cleared up quickly. It only took a couple of hours to set the whole thing up."

Due to the many tools now at its disposal, Richmond plans to expand OnBase even further across the campus—from the Registrar's office to Financial Aid—and has confidence that the system will provide it with functionality for years to come.

ROI

Simplifies conversions: OnBase automatically pulled all document images that met departmental retention requirements from the outdated legacy system and categorized them—leading to the removal of over 500,000 unnecessary documents.

Automates undergraduate admission processes: The University now captures all applications electronically and makes them available to Deans' Offices across multiple schools. This saves staff time and eliminates paper and transport costs.

Provides an enterprise platform: Richmond now has a single central database, one point of integration and one system to backup and secure—giving the University a strong foundation to build on. It is already developing solutions campus-wide that take advantage of tools such as records management, eforms, full-text search and more.

Learn more at **OnBase.com/HigherEducation »**

OnBase®
by Hyland