## What should my unit do to prepare to implement an OnBase Solution?

* Document existing manual, paper-based business processes that you hope to automate using document imaging and workflow.
* An OnBase solution will enable improvements to existing business processes. Outline the desired “future state” of the proposed business processes.
* Assess the human resources available in your office to support a systems implementation and on-going operations. Do you have staff who understand your current business practices and are empowered to make decisions during implementation?
* Visit an office on campus that now uses document imaging (see customer list at <http://niu.edu/doit/services/document/onbase.shtml> ). Ask them to walk you through one business process. This will help you think creatively about your business processes.
* Complete the OnBase Readiness Audit and email it to [onbase@niu.edu](mailto:onbase@niu.edu?subject=Readiness%20Audit).

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| **Department or Division: (e.g. Nursing School, Campus Life)** | **Prepared by:** | **Date:** |
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| **Business Unit (e.g. Admission or Grants):** | **Contact Name:** | **Phone Number / Email:** |
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| 1. **Business Process Information** | | |
| **What anticipated benefits would you hope to accomplish by implementing an OnBase solution?** | |  |
| **List the major business process(es) to be modified.** | |  |
| **Document the desired business process flow.**  (Using any format that works for you, ex: Visio, photo of drawing on whiteboard, Word SmartArt, etc.) | | *Attach flow documents* |
| **List all document types to be scanned and/or stored.** | |  |
| **List all user roles (e.g., student, faculty, approver, business manager) that will be working with the OnBase solution** | |  |
| **Anticipated number of users** | |  |
| **Identify any special requirements that may be required (e.g., systems conversion, required systems integration)** | |  |
| **Other:** | | |
| **2. Timeline Information** | | |
| **Are there some times that are better or worse for you to work on an implementation?** | |  |
| **If there is a firm date of completion? If so, describe the reasons for the constraint.** | |  |
| **Estimate the volume of paper records that will need to be scanned.**  (Number of bankers boxes, number of filing cabinets, etc.) | |  |
| **Other timeline information:** | | |
| **3. Resources** | | |
| **Do you have the resources you can dedicate to this project?** | |  |
| **Who will be the “Power User”? This person will be trained by DoIT, and will be responsible for training new users in your organization.** | |  |
| **Other resource information:** | |  |
| **4. Technical Considerations** | | |
| **Describe all the document input sources including specific vendors.**  (e.g. local scanners, third party data imports) | |  |
| **List all systems where integration is required (e.g., PeopleSoft, Outlook)** | |  |
| **Describe any document image conversion including volume and image source.**  (ex: 1GB TIFF document needs to be converted to PDF) | |  |
| **Other technical considerations:** | | |
| **5. Organization and/or University Benefit/Return on Investment (ROI)** | | |
| **Who would benefit from this project?** (department/unit, entire university, students?) | |  |
| **How much would you save in real dollars that you could re-purpose for tasks that you do not currently have resources to accomplish? Please quantify this as much as you can.** (e.g. supply costs, space reallocation, staff savings, etc.) | |  |
| **Describe any risk reduction.** | |  |
| **Describe any compliance or legal/regulatory issue resolution.** | |  |
| **Describe any customer service improvements.**  (e.g. response time on document receipt, customer service time savings, etc.) | |  |
| **Other Benefit/ROI Considerations:** | | |
| **6. Other important information?** | | |
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Add Diagrams here (Visio, Photo from whiteboard, etc.)