



Customer Success Story | University of Texas at Dallas

## **From application to graduation, rising research university strategically extends OnBase into 25 departments on campus**

**OnBase**<sup>®</sup>  
by Hyland

**THE UNIVERSITY OF TEXAS AT DALLAS, (UTD),** is a four-year, public university located in Richardson. Originally established in 1961 as the Graduate Research Center of the Southwest – by the same men who founded Texas Instruments – UTD remains committed to breaking innovative ground through its research programs in the arts and sciences, engineering and management. With just over 27,000 students, 38 percent of which are at the graduate level, the university has a growth rate of approximately 10 percent each year, positioning it to fulfill its vision to be one of the nation’s best public research universities.



**FUN FACT:**

UTD’s chess team has won outright or tied for first place in 10 Pan American Intercollegiate Championships since the program’s inception in 1996.

## TABLE OF CONTENTS

*Click to jump to a page:*

Introduction .....	<b>4</b>
Financial Aid.....	<b>5</b>
Procurement.....	<b>6</b>
Facilities: Physical Services.....	<b>8</b>
Campus Police Department.....	<b>9</b>
Gender Center .....	<b>10</b>
Request for Graduate Exception.....	<b>11</b>
Disability Resource Services.....	<b>12</b>
Student Teacher Evaluations .....	<b>13</b>
Student and Faculty Travel Management.....	<b>14</b>
Conclusion.....	<b>15</b>

“  
When I arrived, the Vice Provost of that area told me that from January to March **OnBase becomes the most important application on this campus.**”

- Brad Skiles, UTD OnBase system administrator



## INTRODUCTION

An OnBase customer since 2005, UTD has significantly grown its solution from the initial implementation in the Registrar’s office. The university now utilizes the software in 25 different departments across campus, recognizing efficiencies that influence both the faculty and student experience.

In 2014, when Brad Skiles came on board as OnBase system administrator, the school was primarily using OnBase for Admissions and Enrollment.

“When I arrived, the Vice Provost of that area told me that from January to March OnBase becomes the most important application on this campus,” Skiles shared. “We cannot admit students without it. All applications, both graduate and undergraduate, go through it.”

In the Lone Star state, students apply to all postsecondary institutions using ApplyTexas. Once a prospective student submits an online application to UTD via this statewide system, OnBase scans the form to determine if the applicant meets the university’s preliminary acceptance criteria. If yes, the candidate automatically receives tentative acceptance, pending verification of the stated requirements, such as class percentile, SAT or GRE score. Leveraging OnBase, UTD makes admit decisions less than 48 hours after receiving an application, helping the school achieve a piece of its strategic plan: To admit students as quickly as possible.

Skiles continues to cite Admissions as the most impactful OnBase project on campus to date. Beyond owning the lion’s share of UTD’s workflows, the department’s implementation of OnBase has the greatest impact on the university’s mission to serve students of any other application on campus.

“Research states that when students choose a school, one of the factors is simply which one admits them first. With OnBase expediting the decision-making process on our end, we can reach best-fit applicants sooner,” Skiles said.

In addition to scanning the applications and utilizing workflows to help make acceptance decisions, OnBase also gathers and stores the attachments that arrive with a candidate’s submission, such as a resume, portfolio or transcript, so that they can be referenced at a later date.

## FINANCIAL AID

Once UTD admits a student, the application automatically enters a financial aid (FA) workflow for evaluation, making the FA department another of the university's biggest OnBase customers.

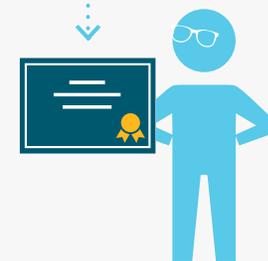
But evaluation isn't the only way that the FA department utilizes the solution.

Most recently, a power user in the department turned a number of the university's scholarship applications into OnBase Unity Forms so that both current and prospective students access the forms through the campus portal. The dynamic forms automatically populate with the student's name and university identifier when he or she logs in and clicks on a scholarship form. Leveraging workflow capabilities, OnBase routes the applications to the necessary parties for review and decision-making so that the university can promptly notify students of awards.

In addition to general UTD scholarship offerings, the Naveen Jindal School of Management, the Erik Jonsson School of Engineering and Computer Science and the School of Arts and Humanities all have scholarship applications built with OnBase.



Leveraging workflow capabilities, OnBase routes the applications to the necessary parties for review and decision-making so that the university can promptly notify students of awards.





Once in OnBase, the documents automatically enter a workflow where they route to the necessary queue for review and approvals – **eliminating the risk of lost invoices and tremendously increasing efficiency.**



## PROCUREMENT

In 2015, a new Director of Procurement joined UTD. To address the lack of automation in procurement processes, she turned to the OnBase team. They began with invoice processing, which involved storing invoices in public Outlook folders. Aside from opening the door for accidentally deleting or misplacing documents, approvals took place over long email chains.

With OnBase, invoices now arrive via mail or email and staff either scan or import them directly into the solution. Once in OnBase, the documents automatically route to the necessary queue for review and approvals – eliminating the risk of lost invoices and tremendously increasing efficiency. Additionally, OnBase provides management with visibility into invoice status to easily identify old and high-priority invoices. The next step is to do the same for the other documentation that comes into the department, such as purchase orders.

UTD's procurement department is currently partnering with Hyland's Services team to develop and implement a second solution for the department to solve challenges with the purchasing card process.

Today, if a staff member goes on a trip for business purposes and requires reimbursement, he must turn in paper receipts or scan and email them over to the purchasing department. Once the receipts arrive, staff must manually match each piece of paper with a line on the p-card invoice. Due to the labor-intensive nature of the process, it sometimes takes up to three months for reimbursement.



Skiles believes that the improvement to this process will have the **largest noticeable impact on campus.**

## PROCUREMENT *(CONTINUED)*

With the new solution, as each invoice arrives from the credit card company, it will go directly into OnBase. From there, the system will parse each line item and store it as keywords, making retrieval and reconciliation a simple task. For employees, typing in their university identifier populates the form with their personal information. They simply need to provide the date the trip began and ended, the purpose for travel, and each vendor and purchase amount. By simply typing in his university identifier, personal information will automatically populate. From there, OnBase automatically reconciles the form with the credit card statement.

Skiles believes that this process improvement will have the most visible impact on campus.

“While we make such a difference in the staff and student experience in areas like Admission and FA, it isn’t always visible. This will be,” said Skiles. The faculty senate has expressed concern about how difficult the current process is and this solution will make people very happy.”

He also notes that one of the best parts about the solution is that the forms are so responsive. “You don’t even need to log in to the app to access them via a table or mobile device,” said Skiles. “We’ll be able to just pop up the form in a browser, take a picture of any receipt and attach it so that it is uploaded directly into OnBase. No more drawers filled with faded receipts.”

## FACILITIES: PHYSICAL SERVICES

Perhaps UTD has seen the most noticeable ROI in a branch of the Facilities department. Physical Services tracks all physical assets on campus – from the desks in faculty offices and classrooms to the chairs in every dining hall. Before OnBase, filing cabinets – a lot of them – held the whereabouts of every individual asset. To convert all of these paper records, UTD filled a training room with scanners and students and, in just a few months, uploaded all of the information into OnBase. By managing and storing files electronically in OnBase, the department gained both efficiency and real estate – three office spaces to be exact – which is in high demand at the rate that the university is growing.



By managing and storing files electronically in OnBase, the department gained both efficiency and real estate – **three office spaces to be exact** – which is in high demand at the rate that the university is growing.





A process requiring staff to go through folders and file cabinets and manually scrub papers to acquire this data will evolve into one that takes just a few mouse clicks – **allowing them to provide results in minutes rather than days.**

## CAMPUS POLICE DEPARTMENT

The state of Texas has strict retention requirements for human resources documents, specifically for candidates who either unsuccessfully apply for or leave jobs at the campus police department. The application packet is about 1.5 inches thick and consists of 140 to 150 pages. Each is stored for 5 to 7 years.

Staff are in the process of scanning all of this paper into OnBase and leveraging a WorkView solution – the first application UTD built using case management functionality. The police department sees immediate benefits from electronic storage and search functionality and will soon recover a large, and much needed, office once occupied by filing cabinets.

The native reporting functionality of OnBase is an additional benefit for the department, with an ROI of time and compliance. Requests often come in for reports detailing hiring practices for minorities, including people of color, women and other groups. A process requiring staff to go through folders and file cabinets and manually scrub papers to acquire this data will evolve into one that takes just a few mouse clicks – allowing them to provide results in minutes rather than days. To make this happen, staff include necessary keywords during the initial scan and store process. The department plans to build a similar solution with all citations.

## GENDER CENTER

Founded in 1996, the Galerstein Gender Center (formerly the Galerstein Women's Center) has grown through the Office of Diversity and Community Engagement into a campus resource for students, faculty and staff. The center provides mentoring, advising and professional counseling services to the UTD community. Before OnBase, all patient counseling information lived on pieces of paper in filing cabinets. To increase both security and efficiency, IT built a basic scan-store-retrieve solution to store the records. IT also built an e-form for caregivers to use to capture notes. They are also working on a case management application that will store patient information directly in OnBase.



To increase both security and efficiency, IT built a basic **scan-store-retrieve** solution to store the records.

## REQUEST FOR GRADUATE EXCEPTION

Much of what UTD's OnBase solution helps it accomplish has a direct, positive impact on the student experience. The request for graduate exception solution, however, is the first application that directly affects the academic side of the house.

In many cases, graduate students fulfill academic requirements through means other than traditional classwork, such as internships or externships. Other times, a scholar may complete coursework at another university. In order to receive credit toward graduation, students must submit a request for graduate exception.

UTD's graduate studies department receives hundreds of these requests each year. And, to add to the complexity, each program has its own approval path. In some cases, an advisor is just the first level of approval, followed by the department head, associate dean and then the dean of the graduate school. In cases where a student is a double major, then the approval path doubles as well.

In the past, the Office of Graduate Studies would track and maintain the approval paths in an Excel spreadsheet, updating them each semester based on individual program requirements. Upon receipt of requests, staff would pull up the spreadsheet, review the approval path, then take a physical piece of paper from desk to desk to get signed. Doing this a couple hundred times a semester was a tedious process for the office staff, advisors and especially students left waiting weeks to find out the status of their requests.

With OnBase, a graduate student simply alerts his advisor of external work that meets course requirements. From there, the advisor enters the appropriate academic code into an online form. Submitting the form kicks off an electronic approval process that routes the request to the appropriate people so that students receive approvals in a fraction of the time.

The workflow talks to a WorkView application that now stores the codes electronically, rather than in a manual spreadsheet, and the form routes to the appropriate parties in the required order.

With OnBase, a graduate student simply alerts his advisor of external work that meets course requirements. From there, the advisor enters the appropriate academic code into an online form. Submitting the form kicks off an electronic approval process that routes the request to the appropriate people so that students receive approvals in a fraction of the time.

Utilizing Hyland's Services team, the university implemented a case management application – built on OnBase WorkView – to track and manage all accommodation requests.

## DISABILITY RESOURCE SERVICES

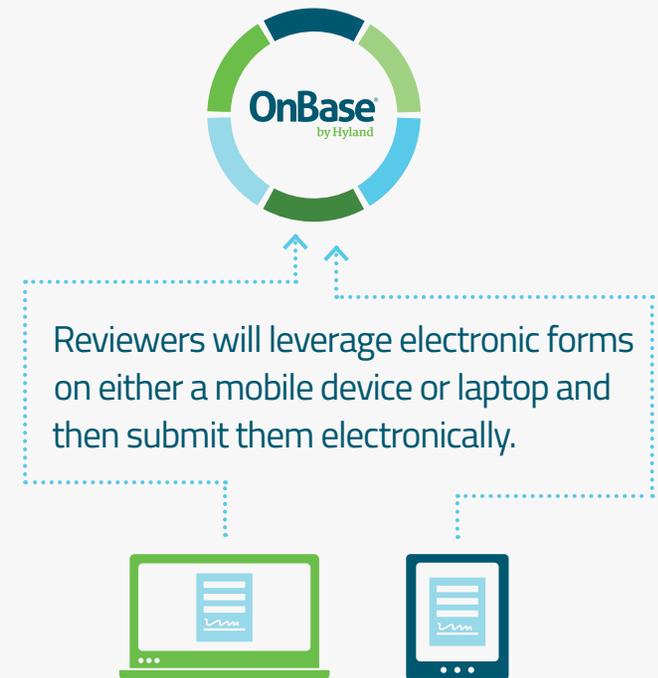
In the past, when a student engaged UTD's Office of Student Accessibility to request special accommodations on campus – a quiet room for tests, special dorm furniture, etc. – the department tracked everything in a spreadsheet. Cumbersome to manage, this method also made it difficult for staff to quickly answer questions, making for a less-than-optimal student experience.

As the university has grown in recent years, so, too, have the number of students making requests for accommodations. The office's budget and staff size have not. Utilizing Hyland's Services team, the university implemented a case management application – built on OnBase WorkView – to track and manage all accommodation requests. This allows students to fill out an electronic request form in OnBase that automatically routes to the appropriate staff member for resource assignment. The solution also confirms receipt of the request and its resource assignment via an email to the student or faculty submitter. These improvements not only streamline the processes in the Office of Student Accessibility, but also increase its ability to deliver superior student service. Down the road, UTD may also automate resource scheduling and add calendaring functionality for even more efficiencies.

## STUDENT TEACHER EVALUATIONS

The university plans to implement another WorkView application to improve its student-teacher evaluation process. Right now, student-teacher evaluations exist as paper forms with completed evaluations manually routed to numerous approvers as directed by the student's program and area of study. Here, too, staff track the approval paths and process on spreadsheets.

To ensure the evaluations are effective and that schools in the state attract and retain good teachers, reporting requirements mandate that state officials see both the evaluation and the results. The evaluation path for reviews varies based on the program and career path of each reviewee – something that is difficult to track in a spreadsheet. Now the university will be able to track this process in OnBase. Reviewers will leverage electronic forms on either a mobile device or laptop and then submit them electronically. This also enables the university to run reports out of WorkView and send scores to the state electronically.





Not only will it save time and better manage information, but the solution will eliminate thousands of sheets of paper each year – which also frees up space in university offices.

## STUDENT AND FACULTY TRAVEL MANAGEMENT

UTD's chess team is regularly ranked in the global final four and boasts a number of international grandmasters. These scholarship-holding champions travel abroad several times a year for competitions. Each time a student travels on behalf of the university, they must fill out four pieces of paper to note items such as emergency contact information, dates and purpose of trip, accommodations and travel arrangements, and so forth. The sponsoring faculty or staff member must fill out an additional three pieces of paper, including a list of students with whom they are traveling. Each trip requires a minimum of seven paper forms. If university equipment is coming along for the ride, yet another layer of paper is added to the mix. This same paper-intensive process is required for each of the more than 1,000 student and faculty trips that take place each year.

Luckily, an OnBase solution is on the horizon to simplify the process. Dynamic Unity forms will leverage WorkView to query PeopleSoft, auto-populating the student's health and emergency contact information. And, because OnBase automatically creates a roster from the student forms, staff will no longer need to fill out student attendee forms. Not only will it save time and better manage information, but the solution will eliminate thousands of sheets of paper each year – which also frees up space in university offices.

## A GROWING TEAM FOR A GROWING SOLUTION

When UTD first deployed OnBase on campus, the team consisted of just two employees – a system administrator and a support person. By 2014, the team had 140 open tickets in its request system and a reputation for not being able to keep up. So many people wanted to use OnBase, the team simply could not keep pace.

Driven by customer demand, UTD grew the team, adding three additional information technology professionals. Now, with 100 percent of its time dedicated to the administration and development of OnBase, the team has less than 60 outstanding tickets.

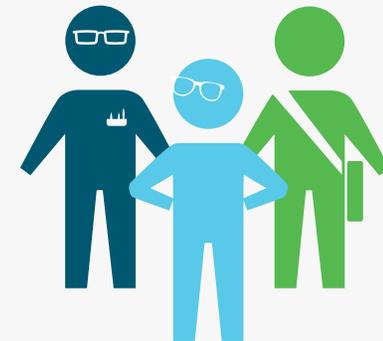
Beyond the IT department's dedicated OnBase team, UTD engages its business users. After speaking with other institutions at the annual OnBase user conference, UTD introduced the solution architect (SA) program in 2015. The program currently consists of five power users in various departments across campus. They take a few basic OnBase training courses, specifically system administration and introduction to workflow, and, once trained, receive access to UTD's development environment so that they can build solutions themselves. Once built, IT's OnBase team tests the solutions, vetting them before putting them into production.

For the SAs, the commitment is minimal compared to the reward. SAs meet each week for two hours to complete training, discuss projects, talk about any challenges they are having and decide what needs to go to IT for testing and production.

“One of the most valuable parts of the SA program is being able to leverage the work our business users are doing in other areas of our solution,” Skiles said. “For example, we have two users who are really active in building Unity Forms and we've been able to replicate those in additional areas on campus to make a faster impact.”

Skiles also noted that it is likely the SA team will grow in the near future, as a few others around campus have expressed interest in joining the effort.

After speaking with other institutions at the annual OnBase user conference, **UTD introduced the solution architect program in 2015.**



“  
We get together to see how other departments use OnBase, discuss upcoming projects, share ideas, challenges and opportunities. **It’s been a tremendous way to gain visibility into the day-to-day needs of our customers** to discover how we can positively impact their work and contribute to their success in the future.

- Brad Skiles, UTD OnBase system administrator

”

## **A VETERAN’S ADVICE: *DESIGN. DOCUMENT. BUILD.***

When it comes to advice for new OnBase customers or those who have a small implementation and wish to grow their solutions strategically, Skiles has three words of advice: Design, document, build.

“Plan from the top down,” Skiles said. “Don’t just build things ad hoc. That’s how you end up with very tailored code and no one knows why it’s there. Design it out, document it, and then build it. And involve users – a lot.”

As UTD evolves its OnBase solution, it continues to involve users along the way. The IT team solicits ideas and feedback through a quarterly user group open to not just power users, but to all OnBase users on campus, that typically draws between 60 and 70 people per meeting.

“We get together to see how other departments use OnBase, discuss upcoming projects, share ideas, challenges and opportunities,” Skiles added. “It’s been a tremendous way to gain visibility into the day-to-day needs of our customers to discover how we can positively impact their work and contribute to their success in the future.”

Another piece of advice: *Create a network of OnBase users at other institutions.*

“My first weekend on the job, I hopped on a plane to head to the annual OnBase user conference (CommunityLive). I’ve attended every year since and can’t stress enough how much I use the OnBase network that I’ve been able to create via this conference,” Skiles said.

“The number one value of CommunityLive is definitely networking with other people. I look not just at the presentation topics, but who is giving the presentations. It’s so valuable to know what other schools have done, or doing, and to also know who is doing it so that we can get in touch with those people when we have a question or challenge.”

## PLANNING FOR THE FUTURE

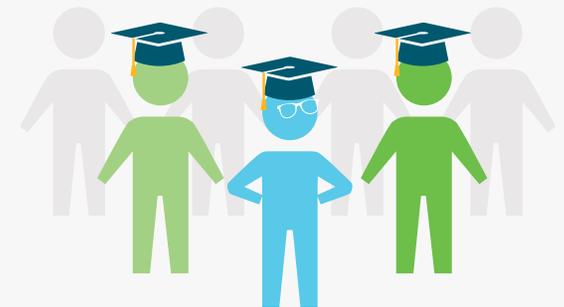
With the guidance of Skiles and his IT team, UTD is quickly recognizing the value of expanding OnBase. With such a large number of possible use cases across campus – from automated transcript capture to student teacher evaluations – the university can continue to create impact and realize value by leveraging this strategic application rather than continue to add to its IT portfolio.

As UTD's portfolio of OnBase solutions quickly expands, Skiles and his team prioritize projects based on impact, visibility and resources, with projects affecting students rising to the top of the list.

Cited in its strategic plan, UTD seeks to increase active people-to-people engagement. By utilizing technology such as OnBase, faculty and staff automate manual, labor- and time-intensive processes, freeing them to focus on what matters most – serving and preparing students for their futures.

The university hopes to extend OnBase in a number of other areas – from the IT department to help with change management to the research side of campus to support its vision “to be one of the nation's best public research universities...” Leveraging OnBase to improve efficiencies and allow UTD staff to focus on opportunities for continuous innovation will certainly position UTD to achieve its initial goal to eliminate paper-based processes.

By utilizing technology such as OnBase, faculty and staff automate manual, labor- and time-intensive processes, freeing them to focus on what matters most – **serving and preparing students for their futures.**



“  
With the unlimited number of solutions we can build on campus, **there is so much opportunity to positively impact people’s work**, make people’s lives better and help them gain efficiency.”

- Brad Skiles, UTD OnBase system administrator

## PLANNING FOR THE FUTURE *(CONTINUED)*

“The reality is, the university is growing at a rate of almost 10 percent a year,” Skiles said. “Processes that worked 10 years ago don’t work anymore – they certainly don’t work cost effectively. We were half the size.”

Processes that force users to print emails, sign and scan in documents, only to send them by email – or worse, walk them from desk to desk – are outdated and inefficient. Beyond making paper processes electronic, Skiles recognizes the value of being able to put the information those documents contain to work through automation and creating dynamic applications with OnBase.

“We need to maintain efficiency so that we can support larger numbers of students,” Skiles said. “There are higher bureaucratic demands that we need to meet without increasing costs to the university. We can’t do that by sending pieces of paper around campus.”

“My favorite part about using OnBase is all the low-hanging fruit,” Skiles concluded. “With the unlimited number of solutions we can build on campus, there is so much opportunity to positively impact people’s work, make people’s lives better and help them gain efficiency.”

One platform  
**Unlimited potential**

**OnBase**<sup>®</sup>  
by Hyland

For more information, visit [OnBase.com/HigherEd](https://OnBase.com/HigherEd) >>