

Records Management Imaging Standard

Introduction

The state standard records management imaging platform is a product provided by Hyland called OnBase. OnBase is not only an imaging platform but also an enterprise content management system.

Purpose

The purpose of this standard is to control costs, reduce technical debt, maintain security and provide a common platform for records management.

Standard

OnBase is hosted in the Azure Government Cloud. It meets health, tax and personal identification security requirements. OnBase is modular by design, allowing the state to tailor solutions to agencies' exact requirements using low code no code. It is used to capture, track and store electronic documents such as PDFs, word processing files and digital images of paper-based documents. OnBase provides document security, access control, centralized storage, audit trails and streamlined search and retrieval.

- Document management.
 - Works electronically with all critical content, regardless of format.
 - Empowers users to easily search for documents while leveraging digital folders and file cabinets to keep content organized.
 - Effectively handles revisions and versions, electronically signs and automatically generates documents for distribution to customers and constituents.
- Manage processes and workflow.
 - Decreases processing time and increases employee productivity by optimizing processes.
 - Automates predictable tasks while delivering exceptions and decisions to the right people at the right time.
 - Sends notifications, enables approvals from mobile devices and load balances important work, increasing efficiency and keeping processes flowing.
- Manage data.
 - Creates data centric and case management applications, replacing antiquated databases, shared spreadsheets and legacy systems.
 - Minimizes the need for custom developed or off-the-shelf solutions for areas including HR onboarding, vendor management and fraud investigation.
 - Provides users with access to all data, documents, tasks and conversations that support a customer, ticket or project from one interface work view.
- Monitor.
 - Provides immediate actionable information about the status of business processes with interactive reporting dashboards available via web browser, Microsoft SharePoint and mobile devices.
 - Managers and process owners proactively monitor processes and determine areas for improvement.

- Audit.
 - Easily view missing, aging or expired information in the OnBase system.
 - Facilitates easier external audits by equipping auditors with access to content through a convenient web portal.
- Report.
 - In comprehensive reporting capabilities, an end user has the visibility into process status, outcomes and the health of the OnBase system.
 - End users run reports with an intuitive interface without IT support or compromising system security.

Compliance

This standard shall take effect upon publication and is made pursuant to Title 62 O.S. §§ 34.11.1 and 34.12 and Title 62 O.S. § 35.8. OMES IS may amend and publish the amended standards policies and standards at any time. Compliance is expected with all published policies and standards, and any published amendments thereof. Employees found in violation of this standard may be subject to disciplinary action, up to and including termination.

Rationale

To coordinate and require central approval of state agency information technology purchases and projects to enable the chief information officer to assess the needs and capabilities of state agencies as well as streamline and consolidate systems to ensure that the state delivers essential public services to its citizens in the most efficient manner at the lowest possible cost to taxpayers.

Revision history

This standard is subject to periodic review to ensure relevancy.

Effective date: 05/11/2022	Review cycle: Annual
Last revised: 05/11/2022	Last reviewed: 08/14/2023
Approved by: Joe McIntosh, Chief Information Officer	