ONBASE TRAINING
What is OnBase: Create, Manage and Retrieve

- Document management system
- Store documents securely and electronically in a central location
- User friendly interface that allows easy retrieval of documents
- Documents can be viewed, printed, emailed, and have notes added to them
- Workflow module for departments that want to use OnBase to process documents
Document Retrieval Dialog Window Layout

- Document Type Groups
- Document Types
- Dates
- Keyword
1. Document Type Groups:

- Document type groups are groups defined by our organization.
- A group is a general heading for specific types of documents.
- Ex. Inventory and Surplus control.

OnBase Document Retrieval

https://caucus.utdallas.edu/AppNet/NavPanel.aspx
• There are two document type groups:
  – Central Receiving Mail Services (CRMS)
  – Inventory and Surplus Control (ISC)
• Anything that has a **tag number**, you can find it on OnBase.

• Assets can be looked in the following categories:
  - asset emails
  - photographs
  - credit card receipts
  - custodian update request
  - custody receipts
  - gift in kind documentation
  - MISC (miscellaneous)
  - missing stolen report
  - property master record
  - state transfer
  - transfer forms
  - vehicle titles
Hello Bing,
Professor George Barnes was incorrectly marked as inactive and is an active adjunct instructor. He just verified with me that he still uses 64909 HP 6510N laptop and it is in his possession.

Mark McNabb is no longer employed at UTD and 73275 MacBook Air laptop is now used as a JACM “check out laptop”. New custodian is me, Alisa Boulom 2030157623.

Thank you,
Alisa Boulom
Administrative Assistant
JACM Technology Services
972-883-4484
aboulom@utdallas.edu

From: Thorp, Craig
Sent: Monday, May 12, 2014 10:00 AM
To: Boulom, Alisa
Cc: Ritchey, David; White, Gregory; Garner, Carla
Subject: Laptops Tag #s 64909 and 73275
Asset Photographs
Credit Card Receipt
Gift in Kind Documentation

OnBase

Documents:

In-Kind Gift Acceptance Form
Office of Development & Alumni Relations
The University of Texas at Dallas

Date: May 14, 2012

School/Unit:
Department:
Form completed by:
Phone:
Email:
Is this gift benefiting more than one school or unit? No
If yes, please list units and their contact persons:

Donor’s Name: Michael Evans
Address, City, State, Zip P.O. BOX 1140, Justin, TX 76247-1140

Type of In-Kind Gift:
- Art or Collectible
- Intellectual Property/ Patent
- Software
- Discount on Purchase (must be in excess of the standard “education discount”)
- Other

Description of Gift: Books (58)

Benefit to University: enhance student access to classic and current works

Value of Gift: $500.00

Source of Validation: [ ] Internal [ ] Donor [ ] Appraisal
Condition of Gift: [ ] New [ ] Good [ ] Unknown [ ] N/A
Special Storage Requirements: [ ] Yes [ ] No

Page 1 of 1
Packing Slips

OnBase

Document Retrieval

Document Types
- ISC - Packing Slips

Keywords
- Asset Tag: 79000
- Description:
Document Retrieval Dialog Window Layout

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OnBase Document Retrieval

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Mark McWhaib is no longer employed at UTD and 73275 Macbook Air laptop is now used as a JSOM "check out laptop". New custodian is me, Alisa Boukom 2010157823.

Thank you,

Alisa Boukom
Administrative Assistant
JSOM Technology Services
972-883-4484
aboukom@utdallas.edu
Asset Photographs
Gift in Kind Documentation

OnBase
Document Retrieval
ISC - Gift in Kind Documentation

Documents
D01317 - 38 BOOKS MICHAEL SAVOIE - ISC - Gift in Kind Documentation - 6/19/2014

In-Kind Gift Acceptance Form
Office of Development & Alumni Relations
The University of Texas at Dallas

Date: May 14, 2012

School/Unit: Office of Development
Department: Development
Form completed by: Michael Savoie
Phone: 972-883-6760
Email: michael.savoie@utdallas.edu

Is this gift benefiting more than one school or unit? No
If yes, please list units and their contact persons:

Donor's Name: Michael Savoie
Address: 1100 W. 7th Street, Suite 520, Dallas, TX 75208

Type of In-Kind Gift:
- □ Art or Collectibles
- □ Equipment
- □ Intellectual Property/Trade Secret
- □ Software
- □ Discount on Purchase (must be in excess of the standard “education discount”)
- □ Other

Description of Gift: Books (38) - 250,000

Benefit to University: enhance student access to classic and current works

Value of Gift: $500,000

Source of Validation: □ Internal □ External □ Donor □ Appreciation
Condition of Gift: □ New □ Used □ Good □ Fair □ Unknown □ N/A
Special Storage Requirements: □ Yes □ No

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0 Note(s)
Packing Slips

OnBase

OnBase Document Retrieval

Document Types
- ISC - Packing Slips
- ISC - Property Master Record
- ISC - Procedures
- ISC - Transfer Forms

From Date: 
To Date: 

Keywords

Keywords
- PO Number
- Voucher Number
- Invoice Number
- Asset Tag
- Description

Notes

Agilent Technologies

Customer Purchase Order Number: 00480325/123850
Agilent Sales Order Number: 00480325
Ship Date: 14-Jan-2014
Freight Terms: Prepaid
Ship Method: FED EX-01RD
Carrier Reference Number: EPN 0232804

Bill To:
Egbert Rent Corp
6500 Sycamore Drive
VAN NUYS CA 91401-2591
United States

Attention:
Egbert Rent Corp
University of Texas at Dallas
2111 N Blvd Rd
RICHARDSON TX 75080
United States

Telephone: 214-268-7789

Please Direct Inquiries To:
Egbert Rent Customer Care Center
Telephone: 1-800-469-5416
Email: csag@egbertrent.com

Agilent Sales Office
Agilent Technologies Inc. / US
PO BOX 4629
STANFORD, CA 93030
United States

For detailed information on the accessories shipped, please refer to the Box Content List located in each individual box.

Bever Contact: Bruce Snyder & Michael Greene
Bever Tel: 818 374 6734 & 818 374 6228
Bever Email:逼近者@stern.com & 蜘蛛@stern.com

Fax 3, B02

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