OnBase Client for Department Administrators

DECEMBER 2016

Version 1.3

Contents

e-Forms Overview

What are e-Forms?

- **e-Forms replace paper forms and email requests**
- Online submission of financial request forms
- Submitted directly to approver and/or finance center
- e-Forms are accessed by the Finance Center for processing

Who uses e-Forms?

- Faculty, Staff, and Students with a NetID can use e-Forms
- Records Management, Endowment Office, and others use the same base system (OnBase) for their forms and workflow

Roles

- Submitters
- Approvers
- Administrator
- Finance Centers

Approvers can be submitters, administrators, or designated finance center staff

How do I access e-Forms?

- e-Forms are found on the Finance Center website:

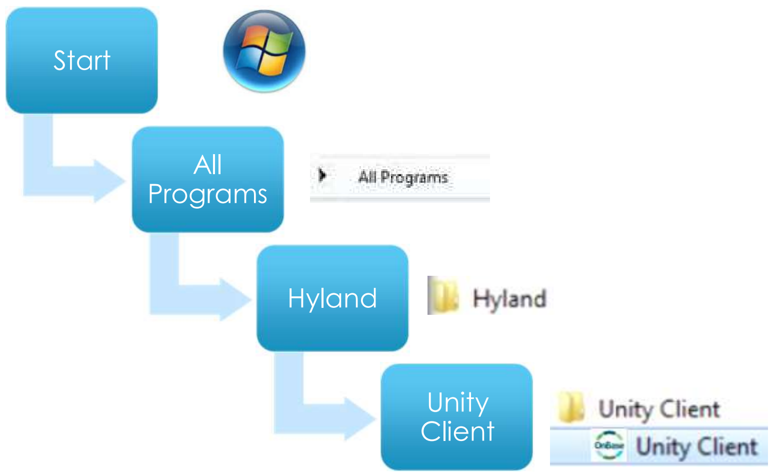
  http://www.dartmouth.edu/~fincenter/forms.html

- e-Forms can be submitted through:
  - Internet Browser (such as Internet Explorer)
  - OnBase Office Integration Forms
  - OnBase Unity Client Forms

OnBase Overview

What is OnBase?

- The OnBase Unity Client is the system that manages the Workflow and Records Retention of e-Forms
- The OnBase Unity Client is a program that is resident on employees computer.
- It is located within the employees Programs under Hyland



OnBase Administrator Access

Administrator Access

- Administrator Access is special access to the OnBase system utilizing the Unity Client to search and review e-Forms
- **Department Admins can see Orgs and Awards have access to in IRA**
- **Department Admins who do not have IRA access but need to access E-Forms and related for their department should complete the Security Access Form and note access for OnBase only**

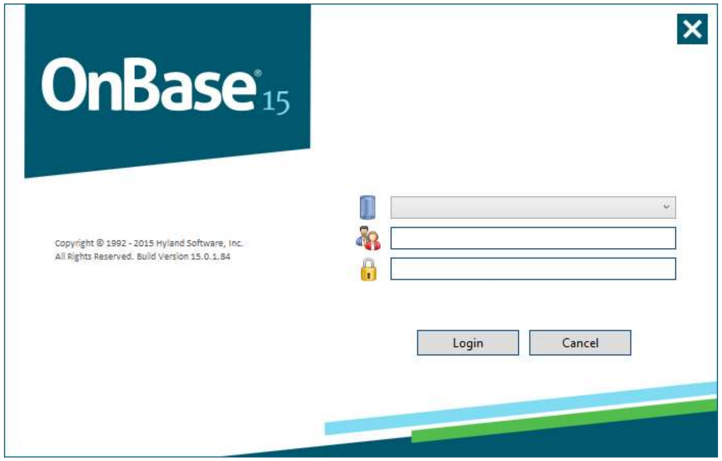
What does my access mean?

- Unity access enables administrators to check the status of requests in the processing workflow
  - You can see all e-Forms for your ORG/Grant by form type (Purchase Request, P-Card, Journals, etc.
  - You can review attachments included in an e-Form
  - You can submit your own e-Form

System Requirements

OnBase Unity Client

- PC – software installation
- Macs – use Parallels or RDS to access OnBase
- Non DC networks (e.g. DHMC) - use RDS to access OnBase
- Computer Supported Browsers:
  - Internet Explorer 11
  - Google Chrome
  - Firefox



Need Unity Software or RDS?

Contact your local IT help desk to have it installed

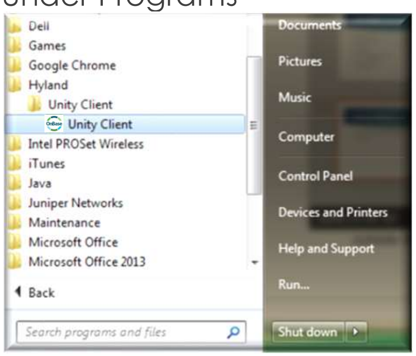
Starting OnBase via Unity

- First log into VPN: Big-IP Edge Client

  OR http://gateway.dartmouth.edu

AND

- Launch the OnBase Unity Client from Start Menu under Programs



Tip: *Save to your Start Menu or add to Taskbar*

OR

- Use the integration from Outlook *(compatible with Outlook 2013)*

OnBase Unity uses Dartmouth Web Authentication

Enter your NetID and password if prompted

Starting OnBase via RDS

- If using OnBase with a Mac or from a Remote location you will need to be setup with RDS (Remote Desktop Service)
- Log into VPN: Big-IP Edge Client
- Go to: https://rds.dartmouth.edu/RDWeb/Pages/en-US/login.aspx?ReturnUrl=/RDWeb/Pages/en-US/Default.aspx
- Enter Dartmouth credentials
  - Kiewit/NetID
  - Password
- Click on OnBase Unity Client

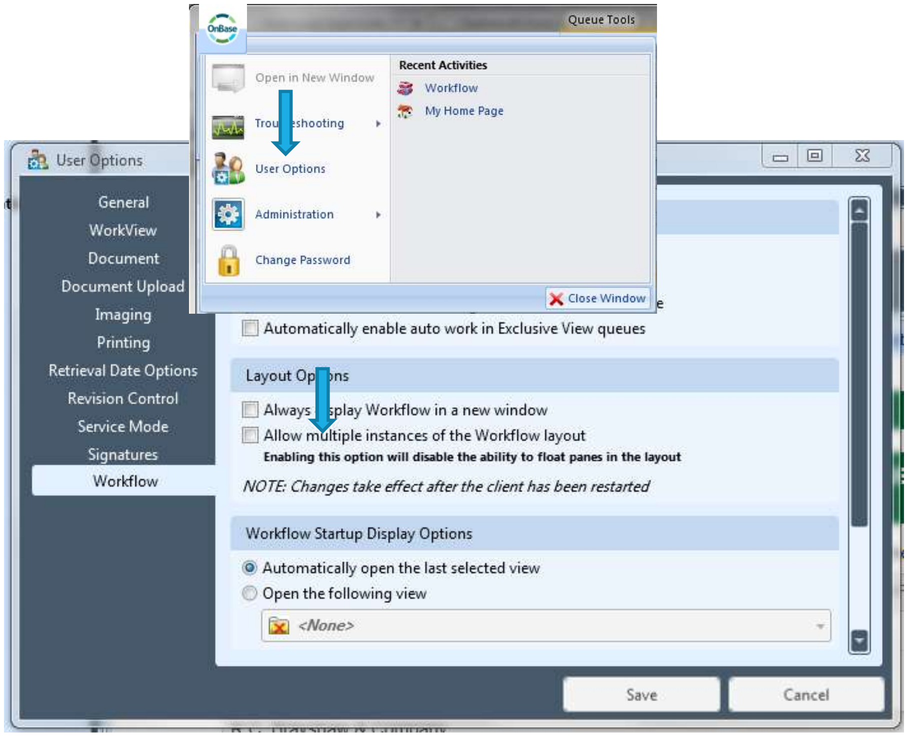
First Run: Make This Change

Important

Unity Client users must make the following change the first time they open Unity:

- Select the **OnBase Icon** (upper left)
- Select **User Options**
- Select **Workflow**
- **Uncheck** "Automatically select first item in the inbox"

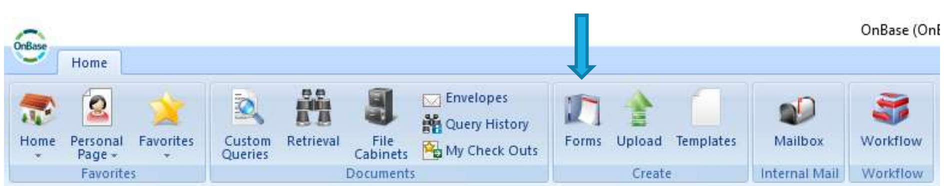
How Important is this?
If a Unity Client user does not uncheck this box, they will lock a request in the Queue causing a delay in processing. In fact, they likely will not be aware that they locked a request!



Submit an e-Form

Two Methods

- Finance Center e-Form links
  - Any faculty, staff, or student with a NetID can use the e-Forms links on the Finance Centers website: http://www.dartmouth.edu/~fincenter/forms.html
- Department Admins can submit within the Unity Client, but it is a little trickier if you have attachments….



Using Unity?

- Select the form type on your left and a blank form will appear for you to complete
- Complete the form

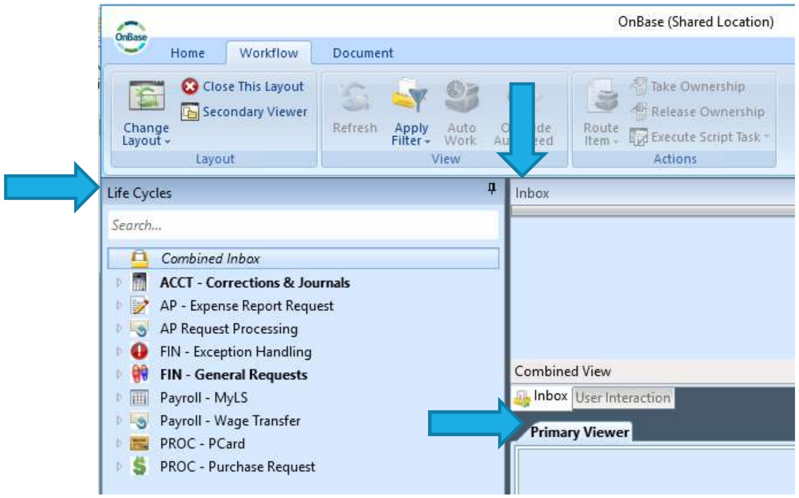
Need to enclose attachments?

- Select "Save without Submitting"
- Use your email notification link to include attachments

Workflow View

- To view e-Forms for your IRA ORG or Grant select **Workflow**

- Workflow has three main areas:
  - **Lifecycles**
  - **Inbox**
  - **Primary Viewer**

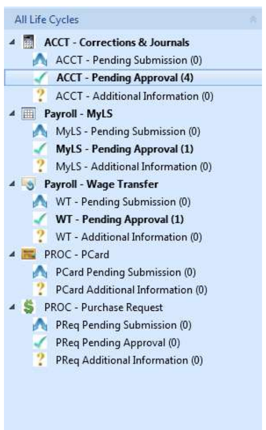


Navigating Workflow

Lifecycles (Queues)

In the Lifecycles area, you have access to the **Queues**, where you can see different e-Forms by type (Purchase Request, P-Card, etc.)

- **Select** the arrow on the left side of the Form Type to expand and see the statuses
- Each Queue will show how many e-Forms are in each processing status
- There may be varying Queues depending upon the e-Form



Inbox

The Inbox area provides a list of e-Forms in process by the queue selected

Sort: select the small arrow on the right of the field

Primary Viewer

Once you have made a selection in the Inbox, the e-Form will be viewable in this section

Special Queues

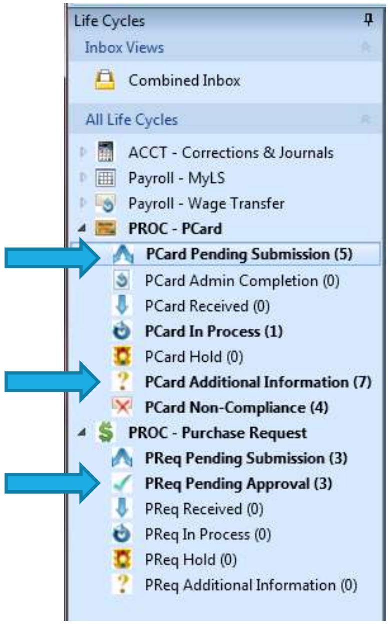
Pending Submission

Additional Information

Pending Approval

- These queues will show e-Forms from other offices and areas of the College
- You will not be able to view the actual e-Form unless you have security access for the information included in the e-Form

Best Practice: Periodically check these queues for older items that may need your attention



Queue Descriptions

- Pending Submission – Requestor started a request but didn't finish
- Pending Approval – Request has been sent to Approver and is waiting to be approved or denied. This is used for both approvals within departments and OSP.
- Pcard Admin Completion – Request has been submitted by someone in the department to the Departmental Admin who will complete the request
- Pending OSP Review – Requests have been sent to OSP and are waiting to be acted on
- In Process – Request has been assigned within the Finance Center
- Hold – Finance Center puts Request on hold while waiting for some event
- Additional Information – Request has been returned to the Submitter for them to correct or add information

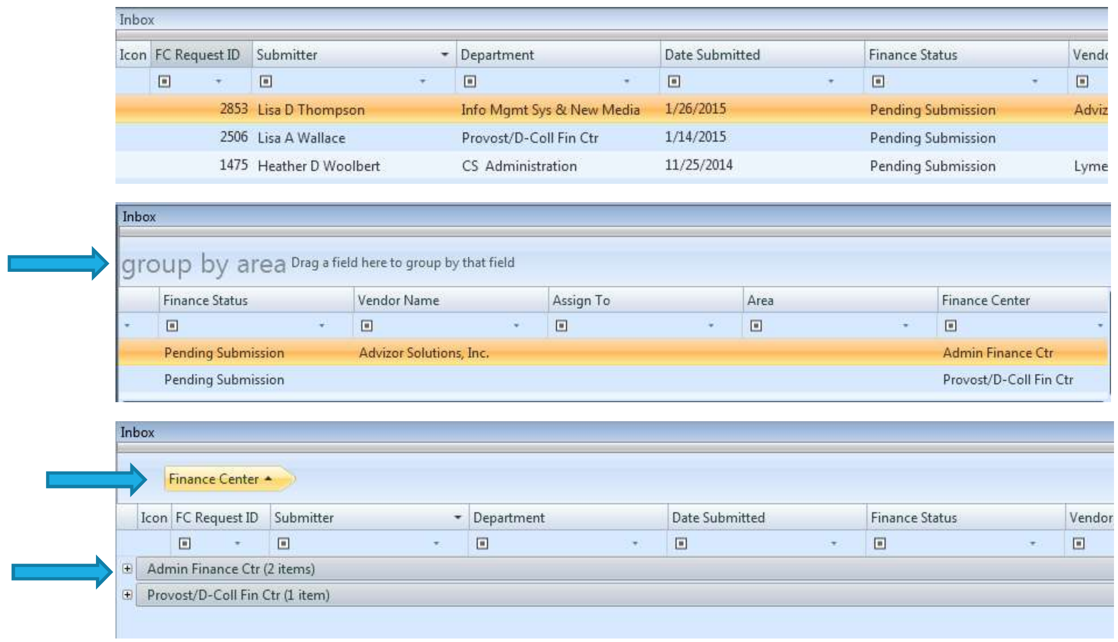
Group the Inbox

Group the Inbox

- Depending upon the number of e-Forms in the Queue, the Inbox can become lengthy to navigate

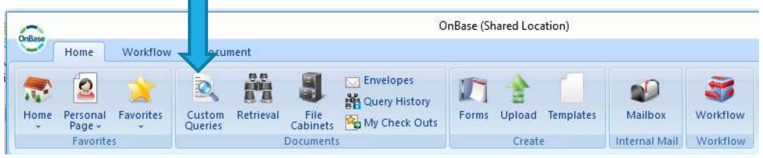
  - **Select** the field you wish to group on
  - **Drag** the column header into the area at the top of the form until "group by area" appears
  - **Let go** at the "group by area" text

Tip: *To view the forms in the group, select +*

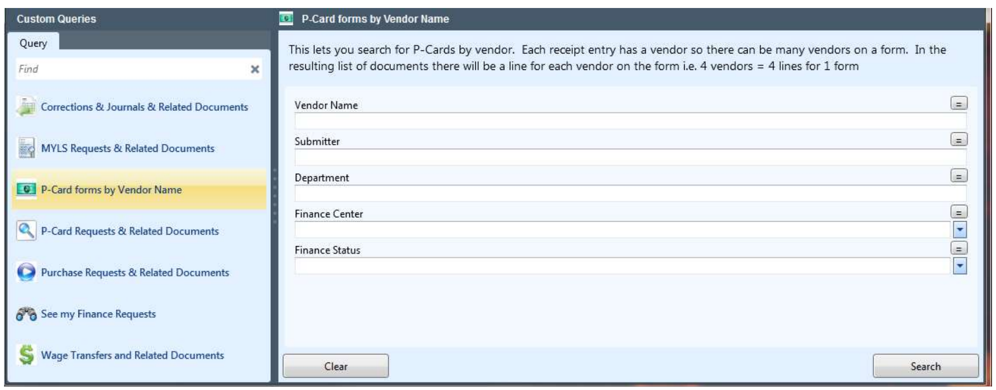


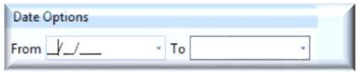
Custom Queries

Use **Custom Queries** to search for e-Forms **in any status** for your ORG/Grant

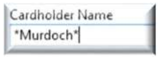


- Each e-form has a query pre-defined using the most common fields to that form



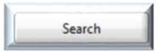


Dates can be selected from the drop down calendar or typed in MM/DD/YYYY



Use the wildcard character * to aid your search

Each line allows you to set the value to equal to =, or does not equal <> , by clicking on the icon

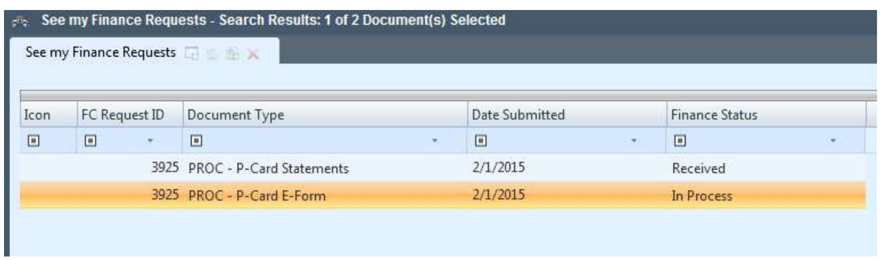


Click Search (bottom right hand corner) to start the query

Custom Queries continued

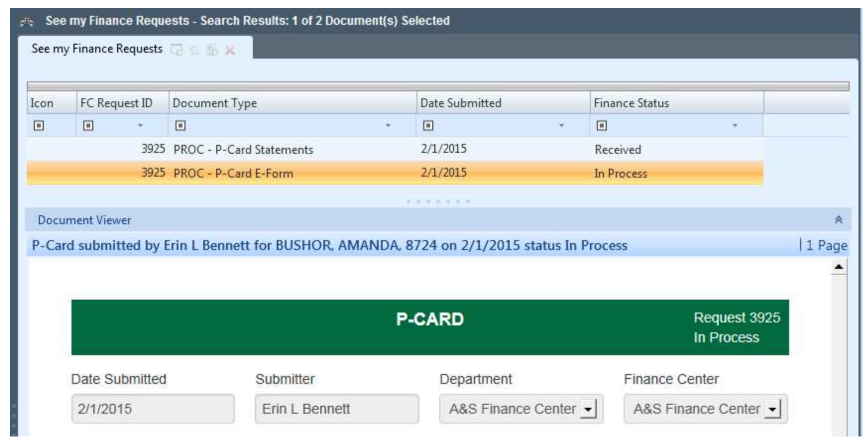
Review Query Results

- Note the Document Type field in the list
  - **E-Form** will signify the form itself
  - **Attachments are listed by the document type** selected when the submitter attached documents to their e-Form



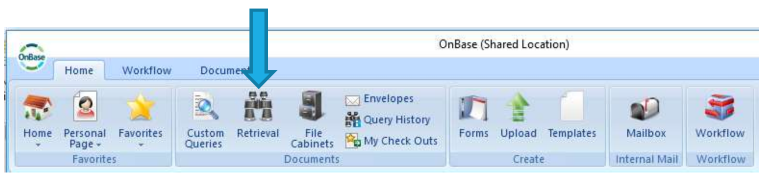
Viewing

- Select the document (e-Form or attachment) to view
  - The information appears in Document Viewer, under the query result list

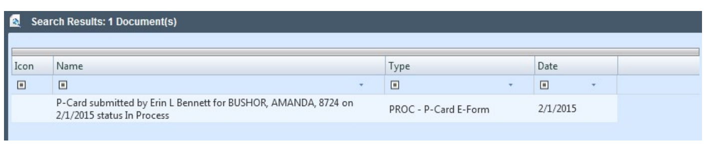


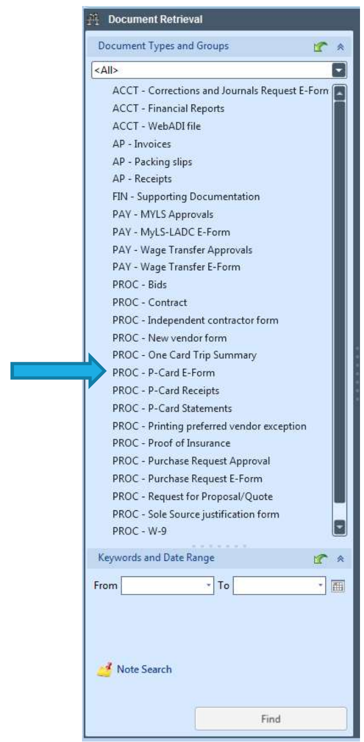
Retrieval

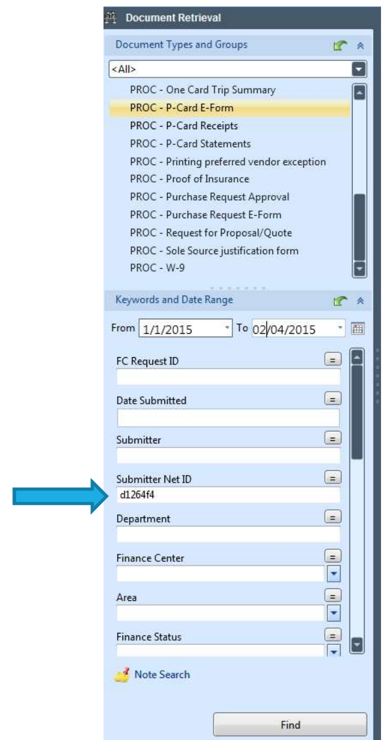
Use the **Retrieval** function to define and perform custom searches on specific document types



- In the **Document Retrieval** area, select the Document Type
- **Enter Keywords** to define your search
- **Double Click** on the search result to view the document



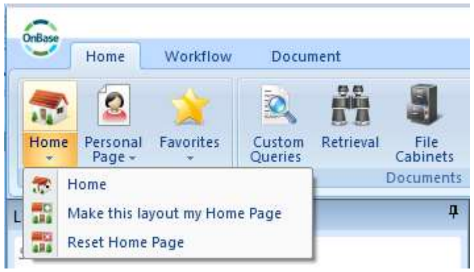




Starting Preferences

Change Your Start Page

- **Custom Query**
- **Retrieval**
- **Workflow**
  - Navigate to the page you prefer
  - Select **Home** in the upper left hand corner and then select '**Make this layout my home page.**'

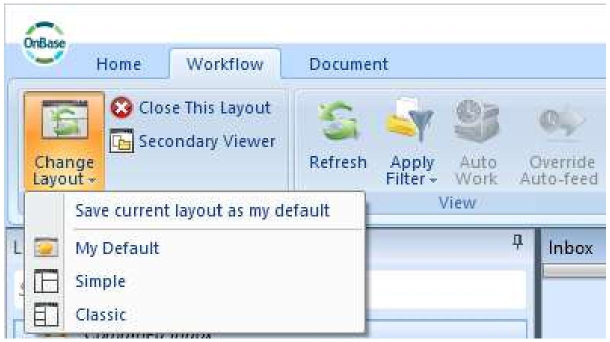


Change Layout in Workflow

- Re-arrange the windows on your own and save as your default

OR

- Select Classic or Simple Layout view and save as your default



Unlock a Request

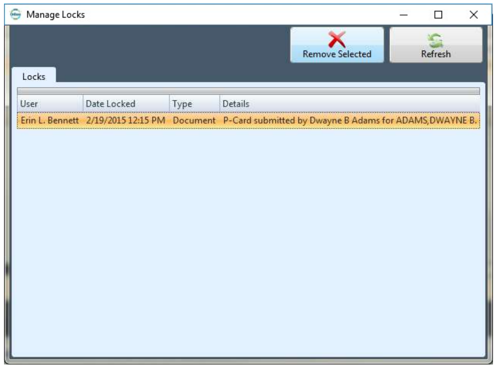
Locked a Request?

It happens and it is usually unintentional.

- If a request is locked, a message will appear stating that the record is locked and will provide a NetID

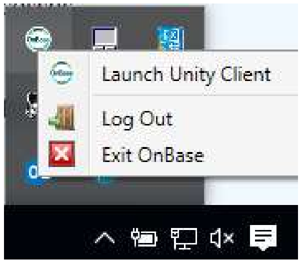
If it is your NetID….

- Select the **OnBase Icon** (upper left)
- Select **Administration**
- Select **Manage Locks**
- A pop up window will appear
  - **Select the request** in the list to highlight the request
  - Select **Remove Selected**
- Ensure that you have followed the instructions for "First Run: Make this Change," earlier in this document



Logging Out

- At the end of your work session close out Citrix if you are using that and the OnBase Unity client
- To close Unity from the task bar in the lower right hand corner of your screen right click and then select Exit OnBase



Contact Information

- Questions or Issues regarding a saved or submitted e-Form?

  Admin and Provost Finance Center 6-1310 or Admin.and.Provost.Finance.Center@dartmouth.edu

  Arts and Sciences Finance Center 6-2028 or asfc@Dartmouth.edu

  Geisel Finance Center 650-1238 or Geisel.finance.center@Dartmouth.edu

  Provost & Dean of the College Finance Center 6-0200 or pdcfc@Dartmouth.edu

  Tuck/Thayer Finance Center 6-3552 or 6-0772 or tuckthayerfinancecenter@Dartmouth.edu

- Questions or Issues related to your computer, smartphone, or tablet and e-Forms?

  Contact the IT help desk at 6-2999 or help@Dartmouth.edu or your local help desk