

# ONBASE TIPS AND TRICKS

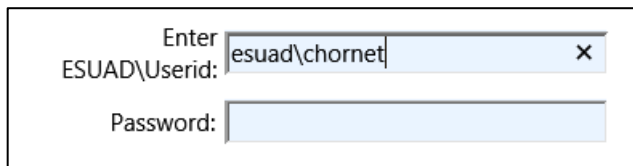
## Browser Compatibility

For up-to-date browser compatibility, please refer to [www.emporia.edu/onbase](http://www.emporia.edu/onbase).

- Firefox
- Chrome
- Internet Explorer (only if you perform the **Web Client Setup Guide and Tools** found at the link above.)

## How to get to OnBase

OnBase is accessible from anywhere in the world as long as you have internet. If you are off-campus, when prompted for a login, you may need to use **esuad\** (backslash) in front of your userid.



Enter ESUAD\userid:

Password:

- Click an OnBase link in your email.
- Hornet365
- [www.emporia.edu/onbase](http://www.emporia.edu/onbase) - click the first link to auto-login.
- **Unity Client** - Install by clicking the link at the bottom of [www.emporia.edu/onbase](http://www.emporia.edu/onbase). (Mac users can't install, but may use SkyLab.)
- **SkyLab** - Use <https://www.google.com/url?q=https%3A%2F%2Fskylab2.emporia.edu%2FRDWeb%2FPages%2Fen-US%2Flogin.aspx%3FReturnUrl%3D%2FRDWeb%2FPages%2Fen-US%2FDefault.aspx&sa=D&sntz=1&usg=AFQjCNEdmcekJZyTEZViQLvOxWpJOlPCGg> if like the features of SkyLab or are traveling and don't have a personal computer. If you prefer the Unity Client or also want access to work email, use the Employee Desktop.



## Document Retrieval

- Search the **Vendor Name** field by typing any part of the vendor name, then click the drop down arrow.
- **\* is the wildcard** in all other fields. In this example search for “stipend” in the Commodity Description.

AP Commodity Desc =  
\*stipend\*

Use an \* before and after the word in case there are other characters before or after the word I'm searching on.

- Search **one or more document types** at one time by holding the CTRL or Shift Key when selecting. Ex: Search AP Invoice Approval and AP Purchase Requisition by a particular vendor or index. Or search AP Invoice Approval and FAC - Service Request by the same index number (Keyword name for index is Banner ACCI).
- Search by **various keywords**: PR# = Banner Document ID; UserIDs (Banner UserID AFKW SKW, Office Manager UserID, Banner UserID NextRoute, SYS Security UserID...); Vendor Name; Banner First Name; Banner Last Name; AP Status; index = Banner ACCI....
  - Press F6 in a Keyword field to create more than one occurrence of the keyword. Be sure to use AND to OR as desired, by clicking.

Vendor Name =  
Print  
(DO NOT USE) Hugaduck Custom Pr  
4 Imprint Inc  
A-1 Printing and Graphics, Inc.  
Acroprint Time Recorder Co  
Amsterdam Printing and Litho  
Artshirt Custom Screen Printing and  
B and C Printwear, Inc  
Cothran Printing Equipment, Inc.  
Darby Printing Company  
FedEx Office and Print Services, Inc.  
Financial Printing Resource, Inc.  
Focus Printing Group Inc  
Focus Printing Group, Inc.

- Find all PRs that are not PAID

AP - Purchase Requisition  
F AP - Purchase Requisition  
Keywords Text Note  
AP Requisition Number =  
Banner Document ID =  
AP Status <>  
PAID

AP - Invoice Approvals  
From Date To Date  
Keywords Text Note  
AP Invoice Number =  
OR  
AP Invoice Number =

- Find all PRs with AP Status = BPC or Direct Pay

Document Types

- AP - Invoice Approvals
- AP - Misc
- AP - Prior Authorization Form
- AP - Prior Authorization Form - PDF
- AP - Purchase Order
- AP - Purchase Requisition

From Date  To Date

Keywords Text Note

AP Status =  OR

AP Status =

- Find all PRs between \$1000 and \$5000

AP - Purchase Requisition

From Date  To Date

Keywords Text Note

Total Amount >  AND

Total Amount <

- Search by the following “indicators” (with a value of 1)

- Find all Grants

Grant Indicator =

- Find all Marketing

Marketing Indicator =

- Find all IT

IT Indicator =

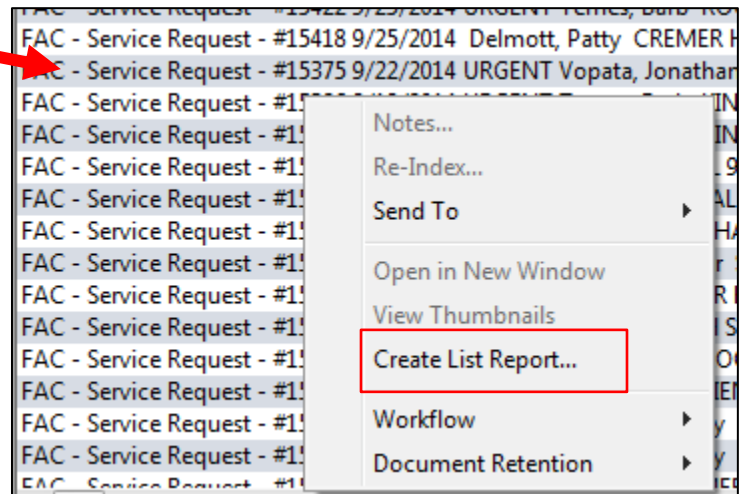
- Find all BPC

BPC Indicator =

- Find all Foundation Direct Pay . Index and accounting information are removed on Direct Pay Invoice Approvals.
- Find all Infrastructure, Equipment, Contracts, and Encumbrances the same way.

Foundation Direct Pay... =

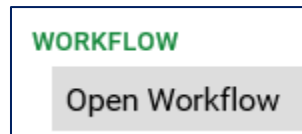
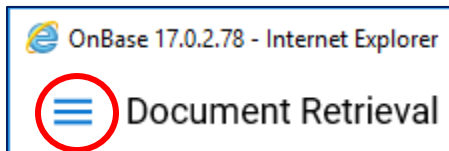
- Whatever criteria you have searched by, you will get a hit list of documents. If you need to print that list or save it to Excel, right click the list, select Create List Report. That brings up this decision box:





If you don't see the Create List Report option and you need it, call Patty or Skylar.

## Workflow

- If you only use email links to get to workflow, there is another way! Once you are in OnBase, click the hamburger menu, then Open Workflow.



- If you use the link in an email to get to workflow, you can't get to document retrieval. The link only brings up workflow. If you open OnBase without using an email link, you see this arrow  that takes you to Document Retrieval.
- Life Cycle View displays all of all the workflows, and you will only see ones you have access to. Click here to change workflow or workflow queues.
- Work Folder will show related documents, if any (ex: Invoice Approval, Invoice, PR, quote, bid, PO...)

- If you change anything on a form in workflow, you must click the  button.
- If you want to Route the document or move it along thru workflow, you must click the



task icons at the top, like these:

- For Purchase Requisitions, of the icons listed above for the PR Originator workflow queue, you would nearly always want to click Route to Approvers.
  - The case for entering Route to Other would be when someone doesn't know enough information to complete the form, and you want to pass it to the person with more information.
  - You could also use Route to Other if you had applicant interview expenses that HR would be paying, and you don't know their index or ORGN number.
  - You would not use Route to Other if you completed the form and wanted to pass the document to the next approver.
  - Route to Approvers knows if you need more department approvals or if the document needs routed to Purchasing, Grants, Foundation, IT or for any other approvals.
- The PR Waiting for Invoice workflow queue is very important! It contains all your unpaid PRs. Make sure that Invoices have a PR number on them if they are associated with a PR. There is no action to take in the queue. When the PR is paid, the PR will automatically exit this queue and exit workflow.

## History - aka "Where is it?" and "Who did it?"

- You can see History from Document Retrieval and Workflow by left clicking the item (blue), then right-click, select History.

AKA Marketing and Promotions LLC - To Vendor \$244.75
Reeves-Wiedeman Co. - PART-PAID \$3,350.00
Kansas Security, LLC - PART-PAID \$1,390.00

- History might look different to you if you clicked a link in email to go to workflow. The Document History tab shows all changes to the form, keywords that were deleted or added, when anyone saved the document, anyone who viewed the document.

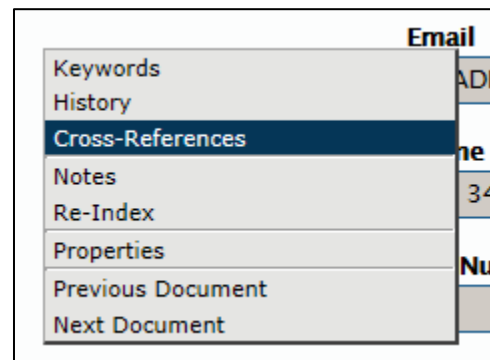
- Workflow Queues tab shows all the workflow queues the document has been in, which queue it's in now, and who released the document from each queue. If you don't think your document is moving along quick enough, you can check here to see where the hang-up is.

Document History				
Document History   Workflow Queues   Workflow Transactions				
Life Cycle	Queue	Entry User Name	Entry Date	Exit User Name
AP Purchase Requisition	PR Waiting for Invoice	EISSERVICE	6/16/2014 5:33:41 PM	
AP Purchase Requisition	Awaiting Response from Banner	MMINGENB	6/16/2014 5:33:22 PM	EISSERVICE
AP Purchase Requisition	Push PR to Banner	MMINGENB	6/16/2014 5:33:21 PM	MMINGENB
AP Purchase Requisition	Controller PR Approval	TSHEPHER	6/16/2014 4:33:46 PM	MMINGENB
AP Purchase Requisition	Contracts PR Approval	TSHEPHER	6/16/2014 4:33:46 PM	TSHEPHER
AP Purchase Requisition	Equipment PR Approval	TSHEPHER	6/16/2014 4:33:46 PM	TSHEPHER
AP Purchase Requisition	Infrastructure PR Approval	TSHEPHER	6/16/2014 4:33:46 PM	TSHEPHER
AP Purchase Requisition	Technology PR Approval	TSHEPHER	6/16/2014 4:33:46 PM	TSHEPHER
AP Purchase Requisition	FAC Decor PR Approval	TSHEPHER	6/16/2014 4:33:46 PM	TSHEPHER
AP Purchase Requisition	Marketing PR Approval	TSHEPHER	6/16/2014 4:33:46 PM	TSHEPHER
AP Purchase Requisition	Purchasing PR Approval	RGEHRKE	6/12/2014 11:15:50 AM	TSHEPHER
AP Purchase Requisition	Grants PR Approval	RGEHRKE	6/12/2014 11:15:50 AM	RGEHRKE
AP Purchase Requisition	Foundation PR Approval	RGEHRKE	6/12/2014 11:15:50 AM	RGEHRKE
AP Purchase Requisition	Dept PR Approval	LSEADER	6/11/2014 3:38:08 PM	RGEHRKE
AP Purchase Requisition	Initial	LSEADER	6/11/2014 3:38:05 PM	LSEADER

This PR was started on 6/11/2014, finished department approvals on the 12<sup>th</sup>, approved by Purchasing and the Controller on the 16<sup>th</sup>, and entered into Banner automatically (EISSERVICE) on the 16<sup>th</sup>. It is currently waiting for invoices. The documents pass thru all the workflow queues, but where the entry date is the same for multiple queues, the document didn't need to perform any work in that queue, so immediately moved on. (In the above example, it didn't need FAC, Technology, Infrastructure, Equipment or Contracts.)

## Cross References

- If you are looking at a document and want to see all related documents, right click on the document or on the hitlist, then click Cross References. For this PR there are multiple documents: PR, PO, Bid and multiple Invoice and Invoice Approvals.



Select Document - Windows Internet Explorer	
Previous Results	Next Results Options
Documents (13)	
AP - Invoice Approvals 4582 - PR000153- 9/15/2014 - KINGOLD - Gould Evans Associates LC - Wait Dept	
AP - Invoice 4582 - PR000153 9/15/2014 - KINGOLD - Gould Evans Associates LC	
AP - Invoice Approvals 3758 - PR000153- 8/13/2014 - KINGOLD - Gould Evans Associates LC - I0164992 PAID \$	
AP - Invoice 3758 - PR000153 8/13/2014 - KINGOLD - Gould Evans Associates LC	
AP - Invoice Approvals 3094 - PR000153- 7/10/2014 - KINGOLD - Gould Evans Associates LC - I0164873 PAID \$	
AP - Invoice 3094 - PR000153 7/10/2014 - KINGOLD - Gould Evans Associates LC	
AP - Invoice Approvals 2455 - PR000153- 6/13/2014 - KINGOLD - Gould Evans Associates LC - I0162908 PAID \$	
AP - Invoice 2455 - PR000153 6/13/2014 - KINGOLD - Gould Evans Associates LC	
AP - Invoice Approvals 1722 - PR000153- 5/23/2014 - KINGOLD - Gould Evans Associates LC - I0161806 PAID \$	
AP - Invoice 1722 - PR000153 5/23/2014 - KINGOLD - Gould Evans Associates LC	
AP - PO PR000153 4/23/2014 - KINGOLD - Gould Evans Associates LC	
AP - Bid 360 - 4/22/2014 9:49:04 AM - KINGOLD - Gould Evans Associates LC - 1104116	
AP - Requisition 360 PR000153 - 4/22/2014 - KINGOLD - Gould Evans Associates LC - PART-PAID \$34,230.00	

For additional helpful documentation, please look here:

<https://sites.google.com/g.emporia.edu/onbase/onbase-documentation>.

If you use the Unity Client, I highly recommend you check out the [OnBase Unity Client - ESU Quick Tips \(video\)](#).