EMPORIA STATE
U N I V E R S I T Y

OnBase Form C User Guide

Version 14.0

General Web Client options for Form C and Workflow Processing

Contents

ABOUT THIS GUIDE

The ESU OnBase web client user guide provides you with detailed, step-by-step instructions that explain Workflow and Form C processing in the OnBase Web Client. Anyone who uses the Form C should have a copy of this reference guide.

In addition to the step-by-step instructions, Notes and Tips are provided to help you along the way. However, another resource for working with the OnBase Web Client is the OnBase Web Help. If you have a question about OnBase click on the Help button to open the Web Help system.

If you are unable to find the information you need in this guide or in the Web Help system, please contact the IT HelpDesk at extension 5555, toll free at 877-341-5555 or via email to helpdesk@emporia.edu.

WEB CLIENT SETUP

If this is your first time accessing OnBase, please follow the "Instructions for Setting up Internet Explorer" instructions found on http://www.emporia.edu/onbase/ to make sure your Internet Explorer is configured to access OnBase.

LOGGING IN

To access the Web Client:

1. Open Internet Explorer and go to http://www.emporia.edu/onbase/ . The OnBase Web Client login options screen displays. If using an on campus computer and logged onto the computer with your username, click on the first link to enter the ESU OnBase web server. Your computer will be logged in automatically.
2. If you are using an off campus computer or need to sign in with an alias username – select the second option for off campus user and login with your username/password.
3. From the Web Client, you will be able to retrieve and view documents from the OnBase system. Depending on your security access, you will be able to see a screen similar to this:
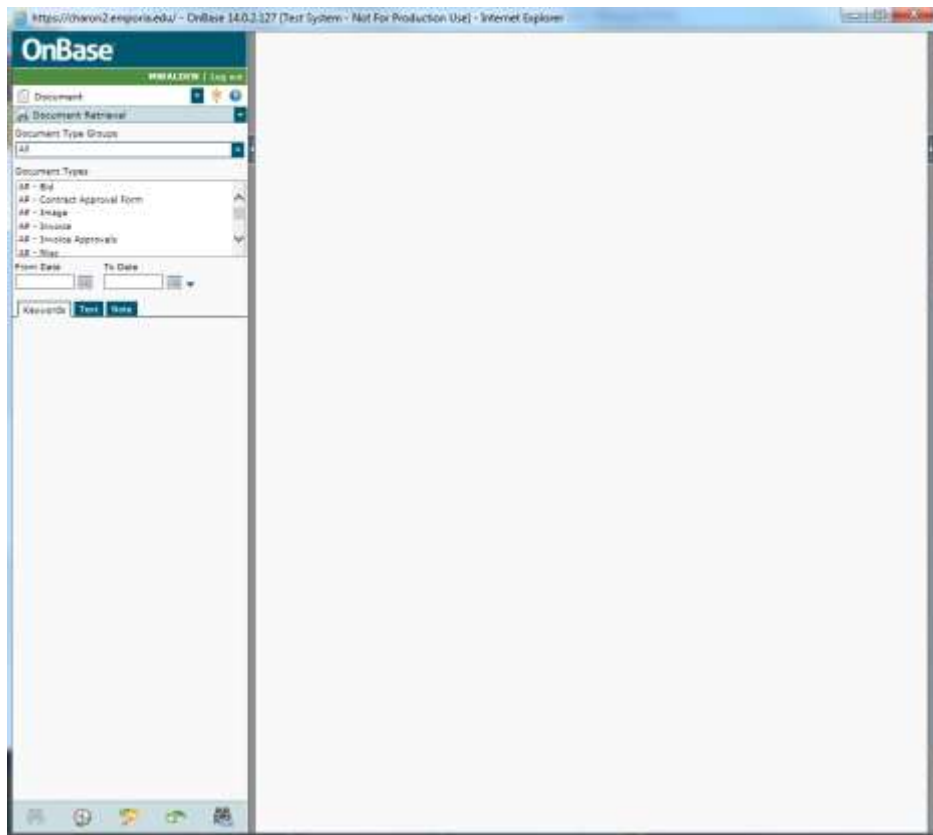
NAVIGATION PANEL OVERVIEW

When logged into OnBase, you will see the document retrieval window. This section will explain more about the navigation panel. The Navigation Panel is comprised of several sections that provide document retrieval, processing, and user options. These sections dynamically change as you select and perform various functions.
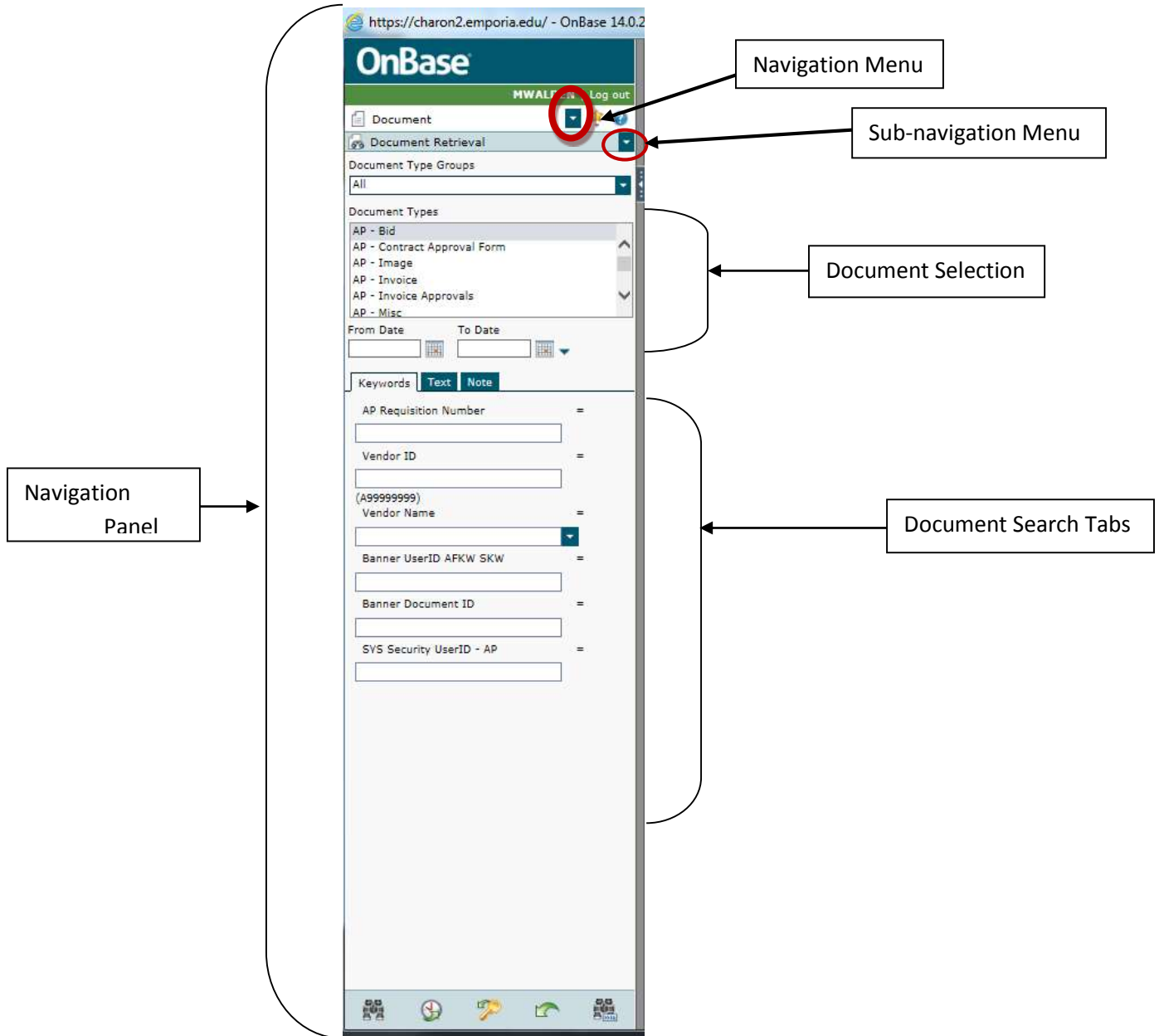
Navigation and Sub-Navigation Menus

The Navigation Menu is the first drop-down menu, it displays the OnBase options available to you based on your user security.

Document opens the Document Retrieval window.

Workflow opens the Workflow window for workflow processing.

StatusView opens a view for Eforms available

Folders opens the Folders view for Graduate Student Files

? Help opens the OnBase Web Client help systems.

Exit closes all open windows and processes and exits the OnBase Web Client.

The next drop-down menu, the Sub-Navigation Menu, displays additional retrieval methods and processing options based on your Navigation Menu choice. These options are also based on your user rights and security.

Document Retrieval opens the Document Retrieval window.

Custom Queries displays a list of pre-defined, task-specific searches.

New Form displays a list of all blank form templates that you have been granted access to in OnBase.

Import Document is used to import files into OnBase from a location that you can browse to from your computer.

Indexing opens the Indexing window so that you can index scanned batches of documents.

A quick note about the date fields on the Navigation Panel. These dates are the dates the document was CREATED in OnBase, NOT the date indicated on the document for searchi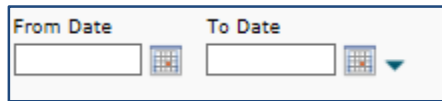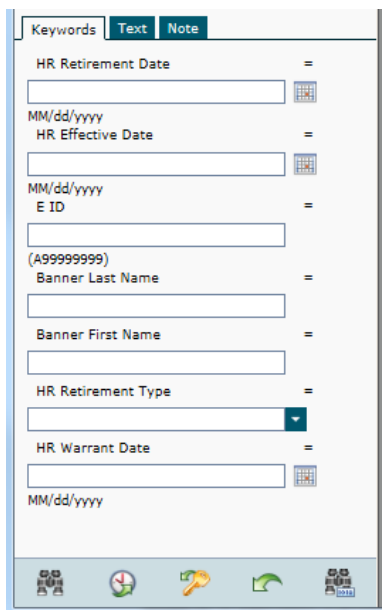ng purposes. For example, when a graduate document is scanned into the system, the date it was scanned in is indexed automatically but has no relation to the date information located inside the document. The ONLY time you should use the date fields is to narrow down a document search based on documents **created** within a time frame in the OnBase system and should only be used by the individuals creating documents in OnBase.

The next section of the Navigation Panel displays a set of four sections, for **Document Search:** Document Selection**,** Keywords, Text, and Note. These tabs are associated with the Document Retrieval navigation option.

The Keywords tab displays your Keyword Type options to search specific documents. Keywords dynamically changed based on the document type you select to search. For example, if you are searching for an HR Retirement Application, you see the keywords on the left. If you are searching for a Grad Transcript document, you will see different keywords to search by.

TIP!   To retrieve documents across multiple Document Types, select each Document Type (use CTRL or SHIFT + left mouse button). As each Document Type is highlighted, any assigned Keyword Types that are common will display in the Keywords frame. If no Keyword Types are common across the selected Document Types, only the date can be used. Otherwise, you should redefine your search until at least one common Keyword Type is available.

The Text tab displays text search options, however, documents scanned into OnBase are unable to be searched for based on text on the document. Do not use this option to search for documents.

The Note tab displays note search options. There are various types of notes created in OnBase. Based on your security access, you can search for information in a Note that could be attached to a document.

Notes have various levels of access, including read only. If a note is attached to a document, you will see a yellow box, looking much like a Post-It© note at the top left hand corner of the document.

To search, you must select the Note Type and in the search string, any word you expect to find in a note. (e.g., award, post)

The final section displays your Document Retrieval Menu. These menu items are associated with executing a document search.

Find initiates your document retrieval based on your selected search criteria. Search criteria can include either a single selection or a combination of Document Type(s), date range, keywords, text search detail, or note search detail.

History displays a list of all of the searches you have initiated during your active OnBase session. If you log out and log back into OnBase, the History list automatically resets.

Clear Keywords clears all keyword values currently displayed on the Document Retrieval window so you can begin another search.

Clear All clears all selected options and keyword values.

Retrieve by Document Handle retrieves a document by the unique number it is assigned when it is imported into OnBase.

PROCESSING FORM C DOCUMENTS

Form C's are used to hire faculty and unclassified professionals. To create a Form C, see the instructions below. Please note – that once a Form C is submitted – the ONLY way to change any values on the form is through the WORKFLOW window.

How to create a Form C

1. In the Navigation menu, Document should be selected (if not, click the down arrow and select it).
2. In the Sub-Navigation menu, click the down arrow and select NEW FORM.
3. In the form list, click on FORM C.
4. The Form will be displayed in the right hand frame. Enter the Employee ID (EID) of the employee and click on LOAD EMPLOYEE INFO.

   NOTE: EVEN IF THE EMPLOYEE IS A NEW EMPLOYEE, YOU MUST CLICK ON THE LOAD EMPLOYEE INFO BUTTON FOR DROP-DOWN LISTS TO BE POPULATED.

5. Fill in the fields appropriately. For question son how to fill in the fields, contact Barb Kern.

   NOTE: YOU CANNOT SAVE THE PROGRESS OF THE FORM, WHICH MEANS ONCE YOU START FILLING IN THE FORM, YOU MUST FINISH. THERE IS A TIMEOUT FEATURE SET TO 60 MINUTES WHICH MEANS ONCE YOU CLICK FORM C, YOU HAVE 60 MINUTES TO COMPLETE THE FORM C AND CLICK SUBMIT/SAVE. YOU CANNOT FILL IN PART OF THE FORM AND CLICK SAVE; YOU WILL RECEIVE A MESSAGE NOT ALL THE FIELDS ARE COMPLETE. IF YOU EXIT FROM ONBASE WITHOUT FINISHING THE FORM, YOU WILL LOSE YOUR WORK.

6. Once the form is ready to be submitted, click on the SUBMIT/SAVE button. There are scripts which will run to verify some of the entries on the form. If the form is filled out correctly, you will see a prompt question "Are there any changes to the static information for this employee?" If there are changes to the employee's information you did not have access to change, select YES and in the next box, denote the change. If there are no changes, select NO.
7. After the form is submitted, you may continue to enter another Form C, click YES on question to submit another form. Otherwise, click CANCEL.

Navigating the Workflow Window

To access the Workflow Window, in the Navigation menu, select the drop-down arrow and select WORKFLOW. An additional browser window will open.

You can maximize the Workflow window by double-clicking on the Workflow's Internet Explorer title bar, or by click on the maximize icon.

Maximize window icon
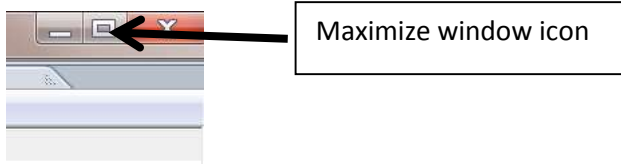
The Workflow window has different icons and is organized differently. The window has 3 separate areas. The first area is the Workflow Navigation frame.

This is the part of the window which displays Workflow Lifecycles you have access to.
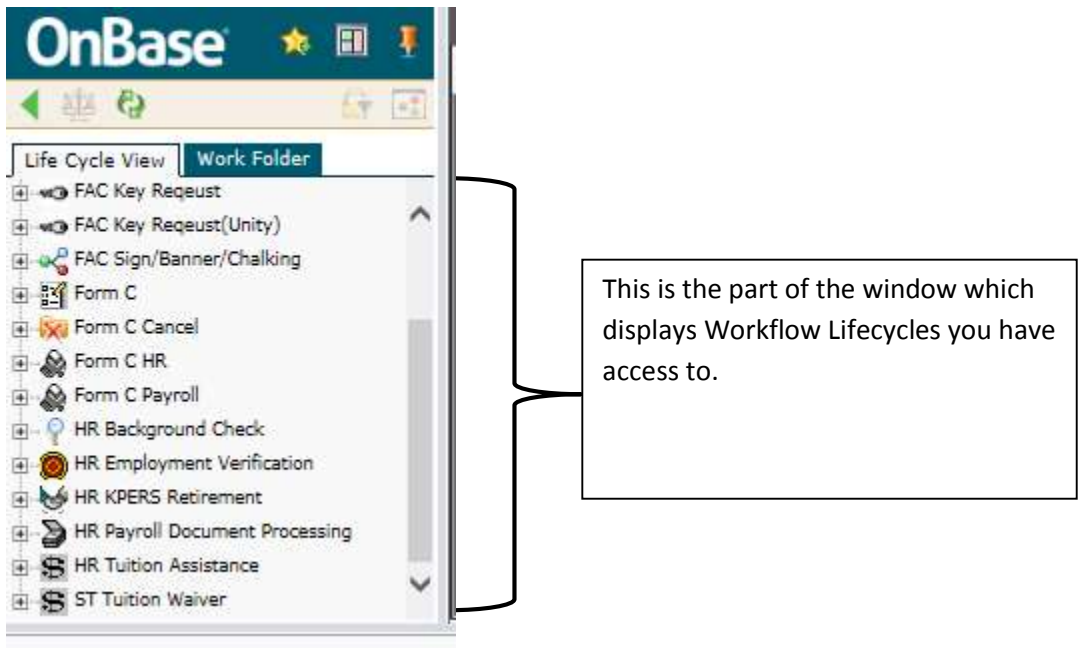
 This will return your view back to the main OnBase Web Client window, typically the document retrieval window.

 This icon is only available to the administrator for load balancing.

 This icon refreshes the queue counts.

 This icon is used to apply filters. Currently no filters are available.

 This icon will change the view to the graphical view of the Lifecycle.

The second part of the Workflow window is the document list and task selection.

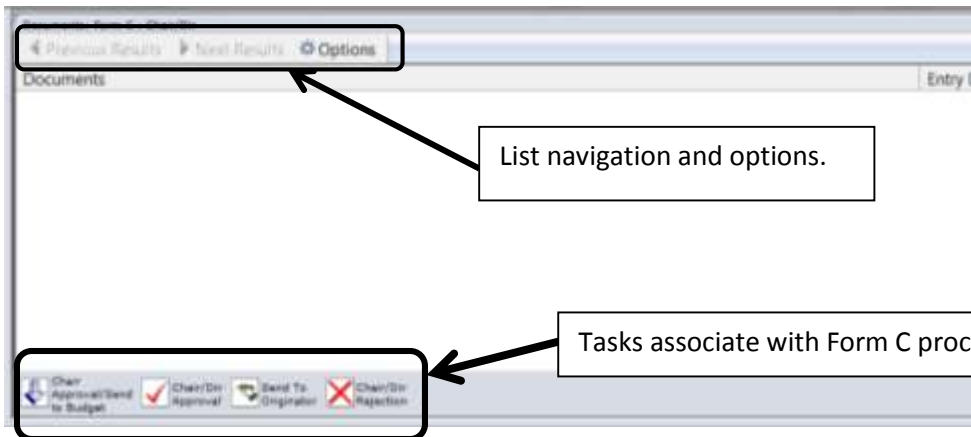The list will be populated when you select a queue with documents to be processed. If there are more results to display, the NEXT RESULTS option will be bold so it can be selected. You can navigate between screens of documents by selecting PREVIOUS RESULTS or NEXT RESULTS. If either of them are greyed out, it means there are no more results to display.

The OPTIONS icon will allow you to change the number of results listed per page and to change the option to display the tool bar button labels.

The task selection is dynamic; it changes based on which Form C queue you have selected to process documents. For example, the CHAIR/DIR queue has tasks to approve, send back to the originator or reject. Tied to each task is a list of commands which will run in the background after the task is selected. For the Form C, when an "approval" type of task is selected, the name of the user and the current date is stamped onto the Form C, which is considered the approval.

The last part of the Workflow window is the document viewer window. It displays the currently selected document. If no document is selected, the window will be blank. To view a document, double-click the document name in the document list (the second part of the Workflow window).

How to Process a Form C

1. With the Workflow browser window displayed, you will see the Workflows you have access to in the upper left hand window. Expand FORM C by clicking on the + sign.
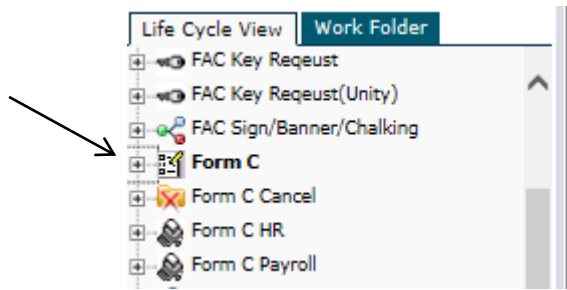
2. Under Form C, you will see the workflow queues you have access for processing. Next to the name of the queue, you will see a number. If the number is 0, there are no Form C's in your queue. If the number is greater than 0, click on the queue name and in the upper right hand frame, there will be the name of the document which needs processing.

> NOTE: If there is only one document, it will automatically display in the lower half of the screen; if there is more than one document, you will have to double-click on the document you wish to select and process.
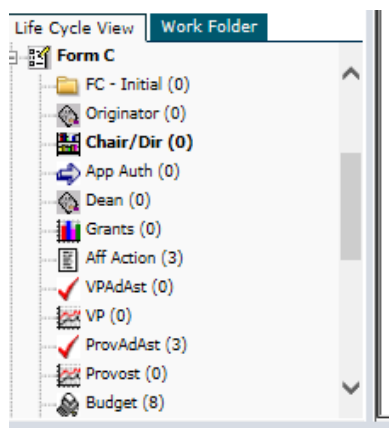
3. After selecting the document, you can review the document and make the appropriate task selection.

> NOTE: It is possible to attach a NOTE to the Form C BEFORE approving it, sending it back or rejecting. BEFORE selecting the appropriate task, right click on the form displayed in the lower half of the screen and select NOTES, ADD NOTE. Select NOTE and click OK. Type the message you want others to view in the note (up to 128 characters) and then click the appropriate task. The note will be saved onto the form and can be viewed by others who are authorized to view the document.

> If you have specific questions regarding information on the Form C, contact Barb Kern.

FAQ's about using OnBase

The Document Retrieval and Folders dialog windows are your means of retrieving and viewing documents in OnBase. While there are other ways to retrieve documents in OnBase, the Document Retrieval dialog window is the default retrieval method that provides you with a variety of filters for streamlining the search process.

As your electronic file cabinet, each section of the Document Retrieval dialog window represents a unique component: The Document Type Groups section represents the file drawer, the Document Types are the file folders, and the Documents that you sear for and retrieve are the pages within the file folders. The Document Types and Document Type Groups you can access are based on your OnBase user profile.

What is a keyword type?

When a document Type is selected, the Keywords tab displays the assigned Keyword Types. Keyword Types are used to quickly identify and retrieve your documents for viewing in OnBase.

For example, if the assigned Keyword Type is Student Name, the keyword's value might be SMITH DUDE (note: in most cases, last name is first, followed by a space and the first name and if applicable, followed by a space and middle initial/name).   The student name keyword type can be assigned to different Document Types, which means it is in "common" with both Document Types (e.g., Grad Asst 08 and Grad). This allows you to search across document types using coming Keyword Types.

Using Keywords to Search

The following Keyword Type search options are based on the keyword values (alphanumeric or numeric) and configuration of the keyword.

Equal To allows you to search for keyword values that are an exact match to what you have entered for retrieval. Clicking on the **Equal To** button will cycle through the options below.

Not Equal To allows you to search on any keyword values that are not equal to what you have entered for retrieval.

Double Quotes returns only those documents containing the literal entry.

The **Drop-down List** provides a list of keyword values for selection. Enter a start value and click on the drop-down arrow. Depending on what you entered, a list of matching values will display for your selection.

Greater Than allows you to retrieve keyword values greater than the numeric value you have entered for retrieval.

Less Than allows you to retrieve keyword values less than the numeric value you have entered for retrieval.

Greater Than/Equal To allows you to retrieve keyword values greater than or equal to the numeric value you have entered for retrieval.

Less Than/Equal To allows you to retrieve keyword values less than or equal to the numeric value you have entered for retrieval.

F6 opens a second entry field for the active keyword value.

AND allows for searching two or more values of the same keyword type that exist on the selected Document Type.

OR allows you to search either one (or more) documents containing either one or more specific Keyword Types.

Click the **AND** button to change the button to the **OR** button

WORKING WITH DOCUMENTS

Documents in OnBase can be manipulated for better viewing or adding notes. The toolbar options that display depend on the type of document you are retrieving (image, PDF, Microsoft Word). Toolbar options for the Document Type that you are viewing are also available from the right-click menu.

Additional toolbar button options may be added based on your user rights.

Viewer Control Toolbar

The Viewer Control toolbar is used for navigating, manipulating, processing and scaling documents.

First Page returns you to the first page of the document.

Previous page moves you back one page.

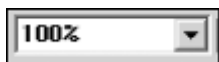Next Page moves you forward one page.

Last page takes you to the last page of the document.

Zoom In increases the zoom area of the document you are viewing.

Zoom Out decreases the zoom area of the document you are viewing.

Zoom Area increases or decreases the zoom area based on a percentage that can be selected from the drop-down list.

Actual Size adjusts the size of the document to its actual width (as though it were printed).

Fit width fits the width of the document to the size of the window.

Fit In Window adjusts the document's size to the best all-around fit for your window.

Rotate Left rotates the document 90 degrees to the left.

Rotate Right rotates the document 90 degrees to the right.

Overlay is designed to allow you to view the document with an overlay—ESU does not use overlays at this time.

Print opens the print dialog window. NOTE: Do NOT click the Internet Explorer Print button; it will not print your OnBase document.

Options allow you to change the thumbnail height and width as well as the size of the zoom area when you click on it.

WEB CLIENT DOCUMENT DISPLAY

In the lower left-hand corner of the open window, is the document page number display. This indicates the number of pages contained in the current document.
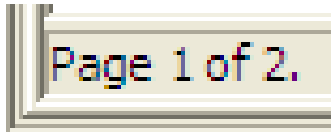

The Thumbnails pane displays when you move your mouse beyond the right border of the open document. Thumbnails can be used for quick access to any page that is part of the current document. If you pause your mouse over a thumbnail, you will receive a quick zoom of that page.
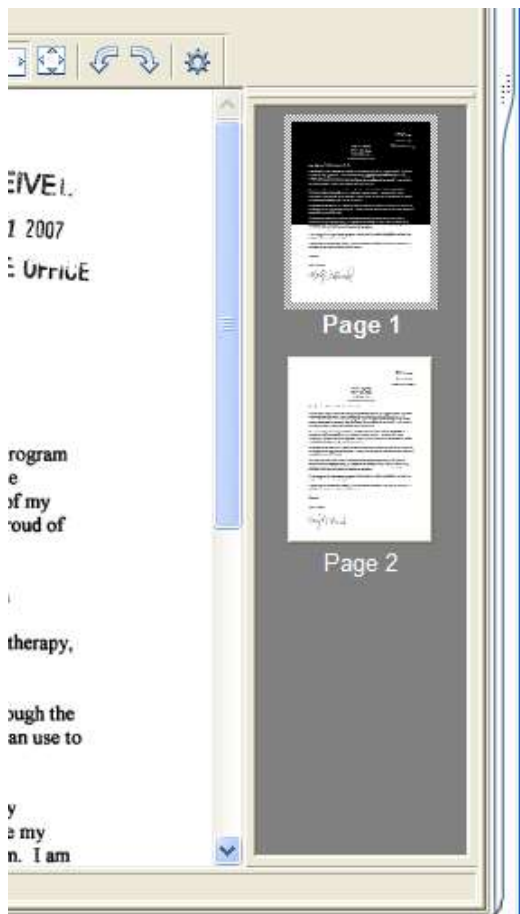
You can also change the currently displayed page of a document by double-clicking on the thumbnail of the page you wish to view.

April 14, 2015

DOCUMENT MENU OPTIONS

Document Search Results Hit List
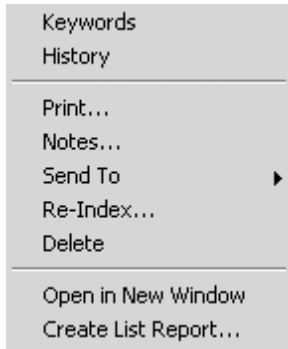
This menu displays when you highlight and right-click on a document from the Document Search Results hit list. Depending on your user rights, you may not have access to all options.

Keywords will display all Keyword Types and keyword values assigned to that document.

History lists past actions performed on the selected document.

Print opens the Print dialog box.

Send To provides four menu options:

- **Mail Recipient** allows you to e-mail the document to a specified recipient if the settings for your user are configured correctly in OnBase. Contact Blaine Smith for more information.

- **File** allows you to save the document to a specified file.

- **Internal User** allows you to send the document to another user in OnBase. However, this is internal to OnBase, does not send it to the user outside of OnBase. Contact Blaine Smith for more information.

- **Envelope** allows you to include the selected document(s) in an envelope. At this time ESU does not use this functionality.

Re-Index displays the re-indexing window. This option is activated based on your user rights.

Delete will remove the document from OnBase, if you have rights to do so.

Open in New Window allows you to open any document from the hit list in a secondary window.

Create List Report creates a text document containing details of the document(s) selected. NOTE: You must have security access to create a list report. Contact Blaine Smith for more information.