

# OnBase Quick Start Guide

## What is OnBase?

OnBase is an electronic form filing system. Faculty and students can complete and submit forms that are processed in workflows that mirror hard copy approval processes but without the downside of paper waste.

## Who can access OnBase?

All UNC students, faculty, and staff can access and submit OnBase forms. Some OnBase forms are protected by additional security, these include forms that only UNC advisors, faculty, department heads etc can submit. Users may need to request additional OnBase access to approve documents and access OnBase workflows. Please email [help@unco.edu](mailto:help@unco.edu) if a user needs their OnBase access updated.

## How to submit OnBase forms?

All OnBase forms are accessible via a form URL using a web-browser (FireFox, Safari, Edge, etc) on both desktop and mobile devices. OnBase form URLs adhere to the following format:

<https://onbase.unco.edu/AccountsReceivable/StudentPayrollDeductionPlan>

The OnBase Base URL / Department who owns the form / Name of the form

There currently is not a public list of all OnBase form URLs, however, many departments maintain their own form pages:

- [Office of the Registrar](#)
- [Purchasing and Contracts \(both OnBase and paper\)](#)
- [Forms posted across the UNCO domain](#)

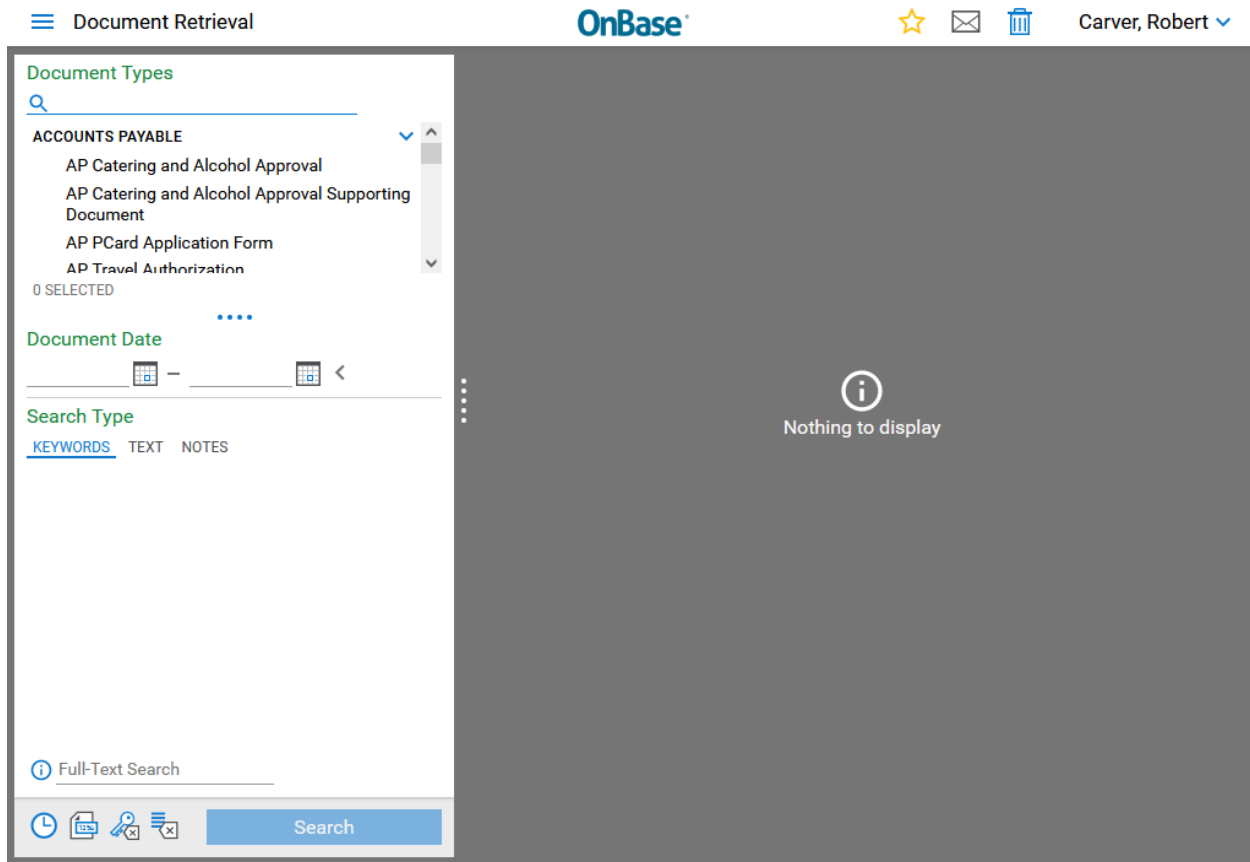
Faculty and staff can also submit OnBase forms via the OnBase Unity-Client.

## OnBase Unity-Client

The OnBase Unity-Client can be used to submit forms, and review forms in Workflow Queues. There are two versions of the Unity-Client: the desktop Unity-Client which can be installed on your Windows workstation and the web Unity-Client which can be accessed using a web-browser. The core functionality between the clients is similar, but the desktop client may be the best choice for “power users”.

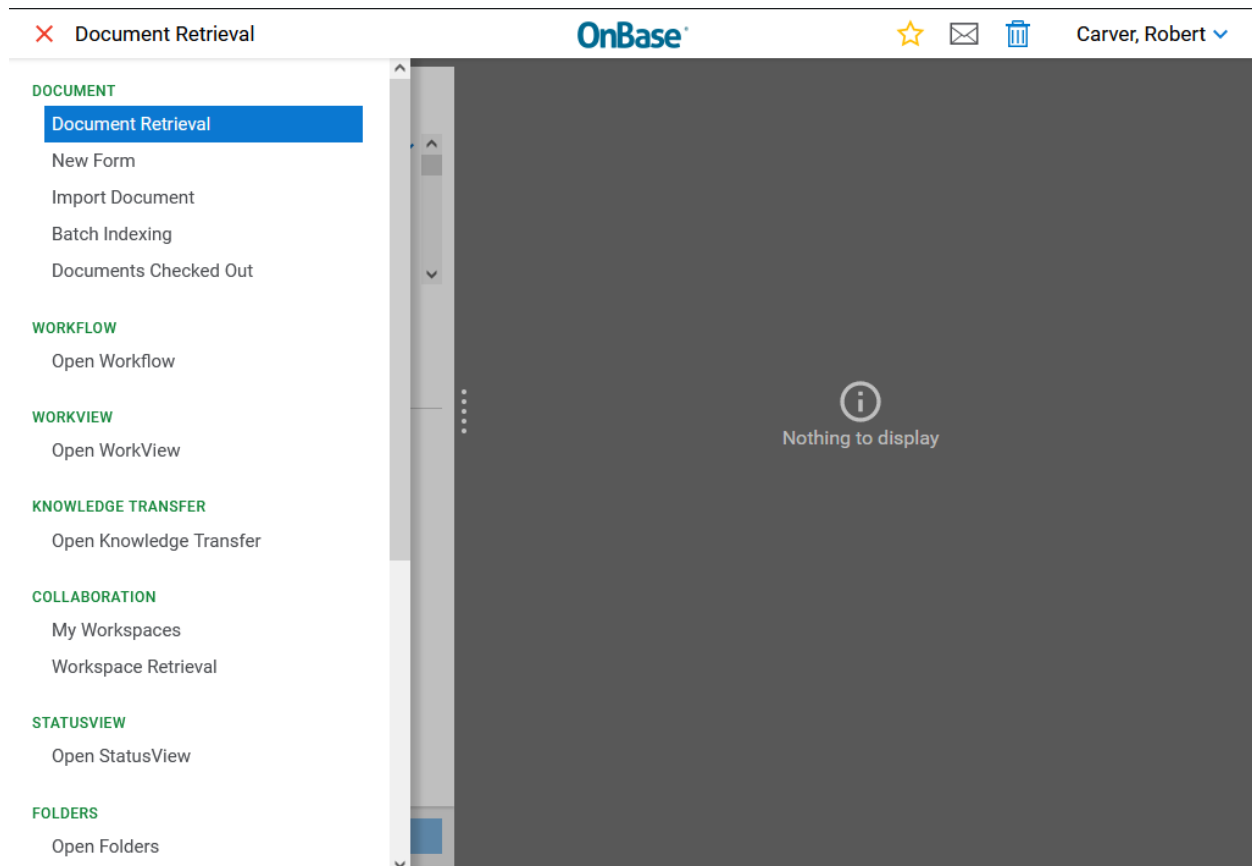
## How to use and access the web Unity-Client

Users can access the web-client from this URL: <https://onbase.unco.edu/appnet/login.aspx> On most browsers you will see a prompt to enable pop-ups, this is necessary for the functionality of the web-client.



When you first navigate to the web-client you'll be greeted by the document retrieval menu. This menu allows users to retrieve any OnBase documents that have been submitted since UNC began using OnBase. Users can select document types and then query more specifically using keywords such as student name, submit date, etc.

Users can access the other functionality of the web-client by clicking the top left "hamburger-menu" icon to expand the navigation menu.



## Navigation menu

- Document
  - Document Retrieval: query submitted documents by type and keywords
  - New Form: submit a new OnBase form
  - Import Document: import document attachments into form workflows
  - Batch Indexing: not utilized by UNC
  - Documents Checked Out: view what documents the current user account has checked out in workflow
- Workflow
  - Open Workflow: launches a new window for the user to view/approve/deny documents that are in workflow
- Workview: not utilized by UNC
- Knowledge Transfer: not utilized by UNC
- Collaboration: not utilized by UNC
- Statusview: not utilized by UNC
- Folders: not utilized by UNC

## Document: New Form

**New Form** OnBase ☆ ✉ 🗑 Carver, Robert ▼

**Forms**

**ACCOUNTS PAYABLE**

- AP Catering And Alcohol Form
- AP PCard Application Form
- AP Travel Authorization

**ACCOUNTS RECEIVABLE**

- ✓ **AR Flywire E-Store Request Form**
- AR Student Payroll Deduction Plan Form

**CONTRACT DOCUMENTS**

- CM Contract Request

**CAREER SERVICES**

- CS Handshake Security

**FINANCIAL AID**

- FAI 2021 Consolidated Appropriation Act (HEERF2/CARES2)
- FAI CARES Act Emergency Grant Application
- FAI CASFA Verification Worksheet
- FAI Cost of Attendance
- FAI Deferrment
- FAI Loan Adjustment
- FAI Student Employment Request

**GREEK LIFE**

- GL Fraternity and Sorority Life Membership

**GRADUATE SCHOOL**

- GR Course Adjustment

**Attach Store Logos or Graphics**

**Upload**

**Please provide a brief description of each store item or event and attach an image if applicable. [Example eStores](#)**

**Store Item** **Add**

**Item Name** **Does this item need a graphic? \***

**Item Price in Dollars \***

**Item Description \*** **Remove**

What graphics to use, digital item, etc.

**Item(s) Graphics (0)**

**Attach Item(s) Graphics**

**Upload**

**Submit**

The New Form window allows users to select a form to complete and submit into workflow. OnBase documents are gated behind internal security groups based on department and job assignment, so not all forms will be available to all users. If there is a form that you can't view in the select list on this page OR receive a blank page when accessing the form URL from a department page then please open a support ticket by emailing [help@unco.edu](mailto:help@unco.edu) and IM&T will correct your OnBase access.

## Document: Documents Checked Out

☰ Documents Checked Out

OnBase®



Carver, Robert ▾



You do not currently have any documents checked out.

This page will display if you have any documents checked-out within workflow. This can be a handy tool as a document can only be checked-out and modified by one user at a time.

## Workflow: Open Workflow

The screenshot displays the OnBase 'Open Workflow' interface. The top section features a navigation pane on the left with a tree view of workflow folders. The main area on the right shows an 'Inbox' table with two entries. Below the table, a summary bar indicates 'Items: 2' and 'Advancement Review Complete'. The bottom section contains a 'Request Information' form with various input fields.

**Workflow Tree (Left Pane):**

- My Owned Items
- Combined Inbox
- AP - Catering and Alcohol Approval
- AP - PCard Application Form
- AP - Travel Authorization
- AR - FlyWire EStore Request Form**
  - Initial (0)
  - Advancement Review (2)**
  - Marketing Review (0)
  - Cashier Review (1)
  - Exit (0)
- AR - Student Payroll Deduction Plan
- CMS - Contract Draft Approval

**Inbox Table:**

NAME	ENTRY DATE
CROISSANT, BECKIE - 6/24/2022	6/24/2022 9:12:18 AM
MURZA, KIM - 8/5/2022	8/5/2022 4:02:45 PM

**Request Information Form:**

<b>Requestor/Store Admin Name *</b> CROISSANT, BECKIE	<b>Department/Organization *</b> NHS Advising Center
<b>Requestor/Store Admin Email Address *</b> rebecca.croissant@unco.edu	<b>Is this for a previously built eStore? *</b> NO
<b>On Behalf of Name</b> Beckie Croissant	<b>Submitted Date</b> 06/24/2022 12:00:00
<b>On Behalf of Email Address</b> REBECCA.CROISSANT@UNCO.EDU	

0 Note(s)      0 Discussion(s)

Clicking “Open Workflow” will launch a new pop-up window for interacting with OnBase workflows. Workflows are custom designed control structures that mirror the approval processes of paper forms.

The screenshot displays the OnBase software interface, which is divided into three main sections:

- Life Cycle View (Left Panel):** This panel shows a hierarchical list of workflows. The 'AR - FlyWire EStore Request Form' is selected and expanded, revealing sub-items: 'Initial (0)', 'Advancement Review (2)', 'Marketing Review (0)', 'Cashier Review (1)', and 'Exit (0)'. Other visible workflows include 'AP - Catering and Alcohol Approval', 'AP - PCard Application Form', 'AP - Travel Authorization', 'AR - Student Payroll Deduction Plan', and 'CMS - Contract Draft Approval'.
- Inbox (Top Right Panel):** This panel displays a list of documents. The header includes 'NAME' and 'ENTRY DATE'. Two documents are listed:
 

NAME	ENTRY DATE
CROISSANT, BECKIE - 6/24/2022	6/24/2022 9:12:18 AM
MURZA, KIM - 8/5/2022	8/5/2022 4:02:45 PM

 Below the list, a green bar indicates 'Items: 2' and 'Advancement Review Complete'.
- Request Information (Bottom Panel):** This panel contains a form for reviewing a document. The fields are:
  - Requestor/Store Admin Name \***: CROISSANT, BECKIE
  - Requestor/Store Admin Email Address \***: rebecca.croissant@unco.edu
  - On Behalf of Name**: Beckie Croissant
  - On Behalf of Email Address**: REBECCA.CROISSANT@UNCO.EDU
  - Department/Organization \***: NHS Advising Center
  - Is this for a previously built eStore? \***: NO (selected)
  - Submitted Date**: 06/24/2022 12:00:00

At the bottom of the interface, there are indicators for '0 Note(s)' and '0 Discussion(s)'.

- **Life Cycle View:** users can view all workflows they have permission to access in this list. Workflow queues are where documents reside awaiting approval in a workflow, once they are approved or denied in a queue, such as Advancement Review in the above example, the document will move on to the next queue, in this case Marketing Review, or the Exit queue if the document is denied.
- **Inbox:** after clicking a queue the inbox displays all documents that a user has access to within that workflow queue, from here users can select which document to review.
- **Document:** the document viewer allows users to review and edit information on a submitted form. Often, users will need to add their information and mark a form approved or denied using this viewer. To save modified information on a form click “Submit” or “Save”.
- **User Actions:** in this area users can view what actions they have available on a form. In our example, once a user has modified the approval keyword on the form using the document viewer, they will save the form and then click “Advancement Review Complete”. The workflow logic will then process the document and route it to the correct queue, Marketing Review if approved, Exit if denied.

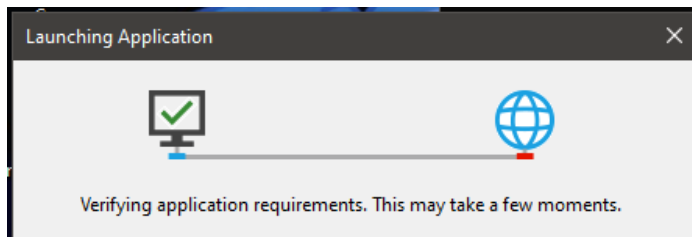
## How to use and access the desktop Unity-Client

While the web-client should be enough for most users to submit and review OnBase documents, some users, such as those working in Purchasing and Contracts, must use the desktop client to access OnBase functions needed to fulfill their job duties.

### Installation

The desktop client can be installed directly by opening the installation link via Microsoft Edge or Internet Explorer on your Windows workstation. This installation will **not complete** properly if initiated through **any other web-browser**. The desktop client is also incompatible with MacOS.

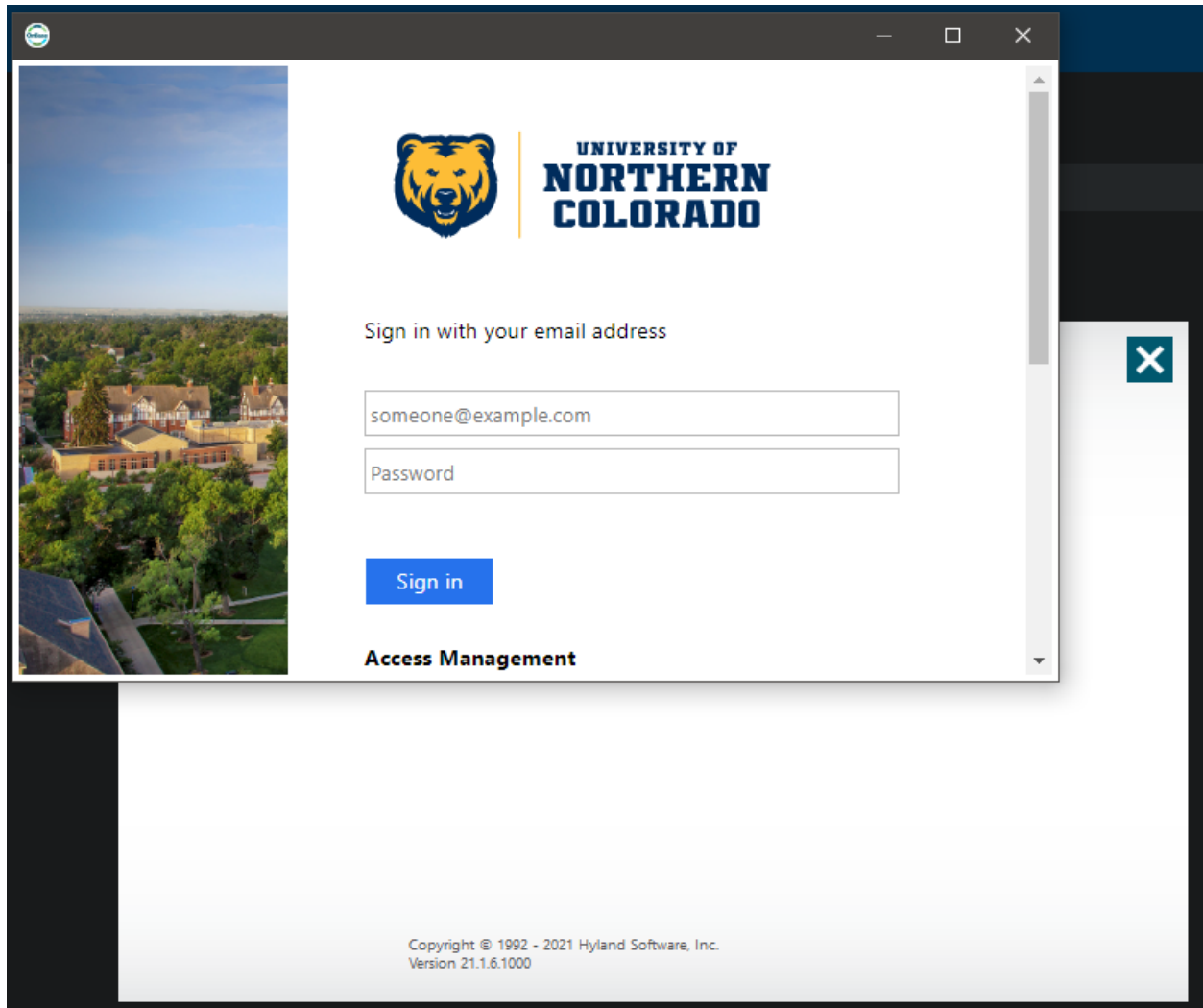
Installation URL: <https://onbase.unco.edu/UnityClient>



You'll see the following window while the installation completes. The installation time will vary based on the speed of your internet connection.

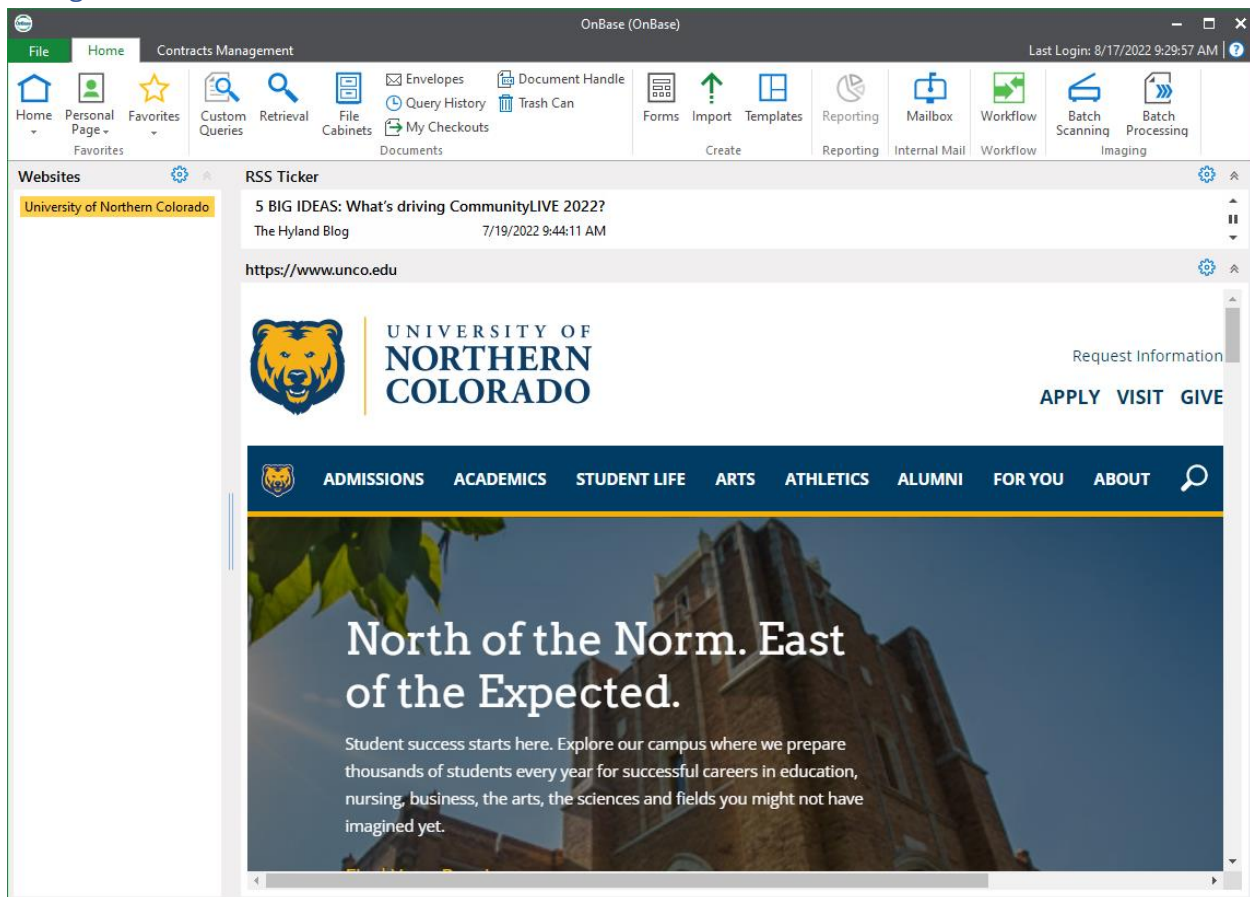


## Logging In



Once the desktop-client has launched you'll be greeted with a login window like the one above. Enter your [first.last@unco.edu](mailto:first.last@unco.edu) and the associated password to login.

## Navigation Ribbon



The Navigation Ribbon is the top bar of the window, from here users can select the following actions:

- Home: return to this home page
- Personal Page/Favorites: save certain pages such as queries, specific workflow queues, forms etc to be accessed later
- Documents
  - Custom Queries: not utilized by UNC
  - Retrieval: query submitted documents by type and keywords
  - File Cabinets, Envelopes: not utilized by UNC
  - My Checkouts: view what documents you have checked out
  - Document Handle: query documents directly via a range of Document IDs
  - Trash Can: not applicable to non-admin users
- Create
  - Forms: submit a new OnBase form
  - Import: import document attachments into form workflows
  - Templates: not utilized by UNC
- Reporting: not utilized by UNC
- Mailbox: internal OnBase emails can be stored here
- Workflow: view/approve/deny documents that are in workflow

- Access the Contract Management system through its dedicated tab. The functionality of the contract management system is beyond the scope of this document.

## Documents: Retrieval

OnBase (OnBase)

Last Login: 8/17/2022 9:29:57 AM

File Home Contracts Management Document

Home Personal Page Favorites Custom Queries Retrieval File Cabinets Envelopes Document Handle Forms Import Templates Reporting Mailbox Workflow Batch Scanning Batch Processing

Documents

Document Retrieval

Document Types and Groups

<All>

- AP Catering and Alcohol Approval
- AP Catering and Alcohol Approval Supporting Document
- AP PCard Application Form
- AP Travel Authorization
- AP Travel Authorization Supporting Document
- AR Flywire EStore Request Form
- AR Flywire EStore Supporting Document
- AR Student Payroll Deduction Plan
- CM Affiliation/Internship
- CM Amendment

Keywords and Date Range

From To

Submitted By Name

Robert Carver

Submitted By Email Address

Submitted By Username

Full-Text Search

Search Text: ?

Note Search

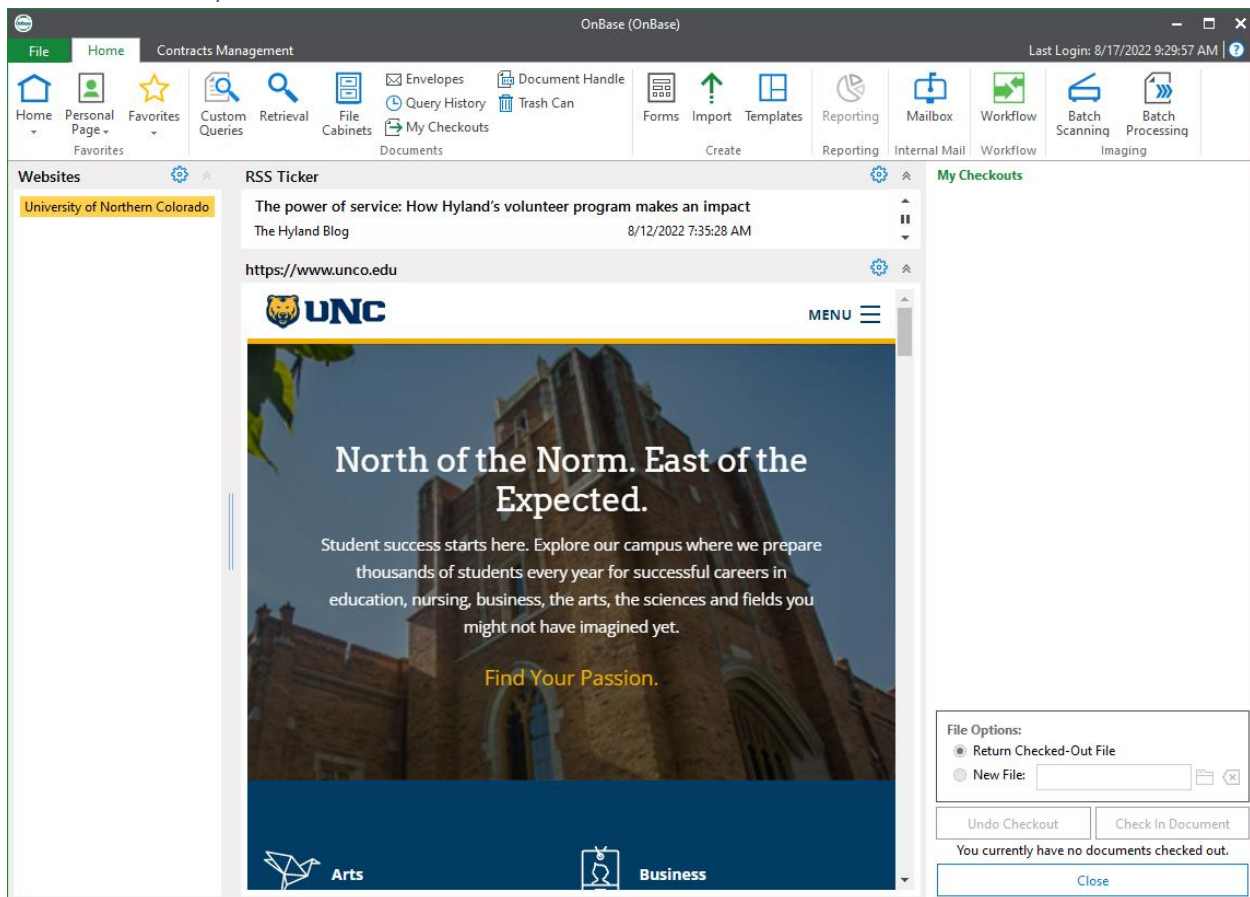
Text Search

Find

Document Viewer

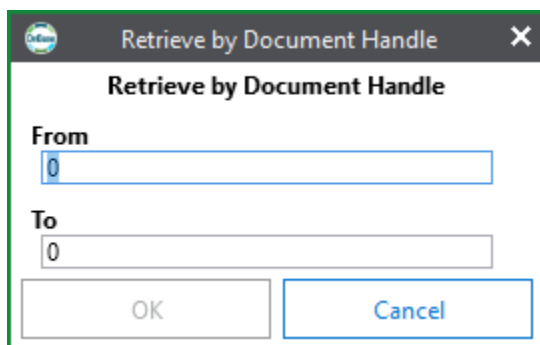
This menu allows users to retrieve any OnBase documents that have been submitted since UNC began using OnBase. Users can select document types and then query more specifically using keywords such as student name, submit date, etc.

## Documents: My Checkouts



This menu will display if a user has any documents checked-out within workflow. This can be a handy tool as a document can only be checked-out and modified by one user at a time.

## Documents: Document Handle



Query documents directly via a range of Document IDs, when executed this will provide a list of results like the Retrieve menu.

## Create: Forms

The screenshot displays the OnBase (OnBase) application interface. The top navigation bar includes 'File', 'Home', and 'Contracts Management'. The 'Home' tab is active, showing a 'Forms' menu on the left and a main workspace on the right. The 'Forms' menu lists various forms, with 'AR Flywire E-Store Request Form' highlighted. The main workspace shows the 'AR Flywire E-Store Request Form' with fields for 'Item Name', 'Does this item need a graphic?', 'Item Price in Dollars', and 'Item Description'. There are also sections for 'Attach Store Logos or Graphics' and 'Item(s) Graphics (0)'. A 'Submit' button is at the bottom.

OnBase (OnBase)

Last Login: 8/17/2022 9:29:57 AM

File Home Contracts Management

Home Personal Page Favorites Custom Queries Retrieval File Cabinets Envelopes Query History My Checkouts Document Handle Trash Can Forms Import Templates Reporting Mailbox Workflow Batch Scanning Batch Processing

Forms

Find

Accounts Payable

- AP Catering And Alcohol Form
- AP PCard Application Form
- AP Travel Authorization

Accounts Receivable

- AR Flywire E-Store Request Form
- AR Student Payroll Deduction Plan Form

Contract Documents

- CM Contract Request

Career Services

- CS Handshake Security

Financial Aid

- FAI 2021 Consolidated Appropriation Act (HEER)
- FAI CARES Act Emergency Grant Application
- FAI CASFA Verification Worksheet
- FAI Cost of Attendance
- FAI Deferralment
- FAI Loan Adjustment
- FAI Student Employment Request

AR Flywire E-Store Request Form

Attach Store Logos or Graphics

Upload

Please provide a brief description of each store item or event and attach an image if applicable. [Example eStores](#)

Store Item

Add

Item Name

Does this item need a graphic? \*

Item Price in Dollars \*

Item Description \*

What graphics to use, digital item, etc.

Remove

Item(s) Graphics (0)

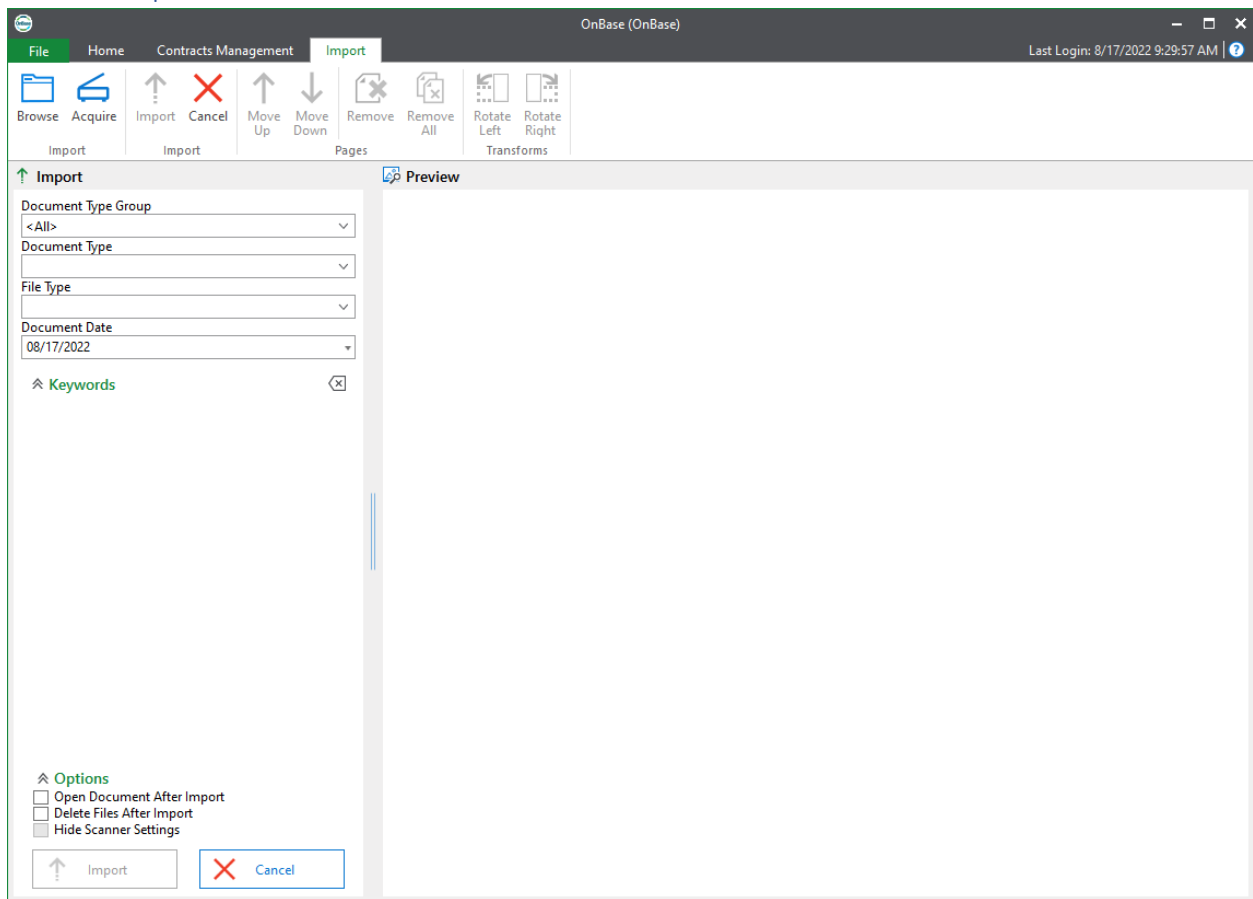
Attach Item(s) Graphics

Upload

Submit

The Form menu allows users to select a form to complete and submit into workflow. OnBase documents are gated behind internal security groups based on department and job assignment, so not all forms will be available to all users. If there is a form that you can't view in the select list on this page OR receive a blank page when accessing the form URL from a department page then please open a support ticket by emailing [help@unco.edu](mailto:help@unco.edu) and IM&T will correct your OnBase access.

## Create: Import



Users can import documents/attachments into forms and workflows from this menu. This is only accessible to OnBase admin users.

## Workflow

The screenshot displays the OnBase (OnBase) Workflow interface. The top navigation bar includes tabs for File, Home, Workflow, Contracts Management, Document, Queue Administration, and a search bar. The Workflow tab is active, showing a list of items in the 'Inbox' section. The list has columns for 'Name' and 'Entry Date'. Two items are visible: 'CROISSANT, BECKIE - 6/24/2022' and 'MURZA, KIM - 8/5/2022'. Below the list, there is a section for 'Advancement Review' with a 'Primary Viewer' tab. The 'Primary Viewer' shows the details for 'CROISSANT, BECKIE - 6/24/2022'. The details include a table for 'Approvals' with columns for 'Approver Name' and 'Approval Status'. The table has three rows: 'Advancement Approver Name', 'Marketing Approver Name', and 'Cashiers Approver Name'. Each row has a corresponding 'Approval Status' dropdown menu. Below the table is a 'Denied Reason' text area. A 'Save' button is at the bottom of the form.

Name	Entry Date
CROISSANT, BECKIE - 6/24/2022	6/24/2022 9:12:18 AM
MURZA, KIM - 8/5/2022	8/5/2022 4:02:45 PM

Advancement Review 2 Items

Primary Viewer

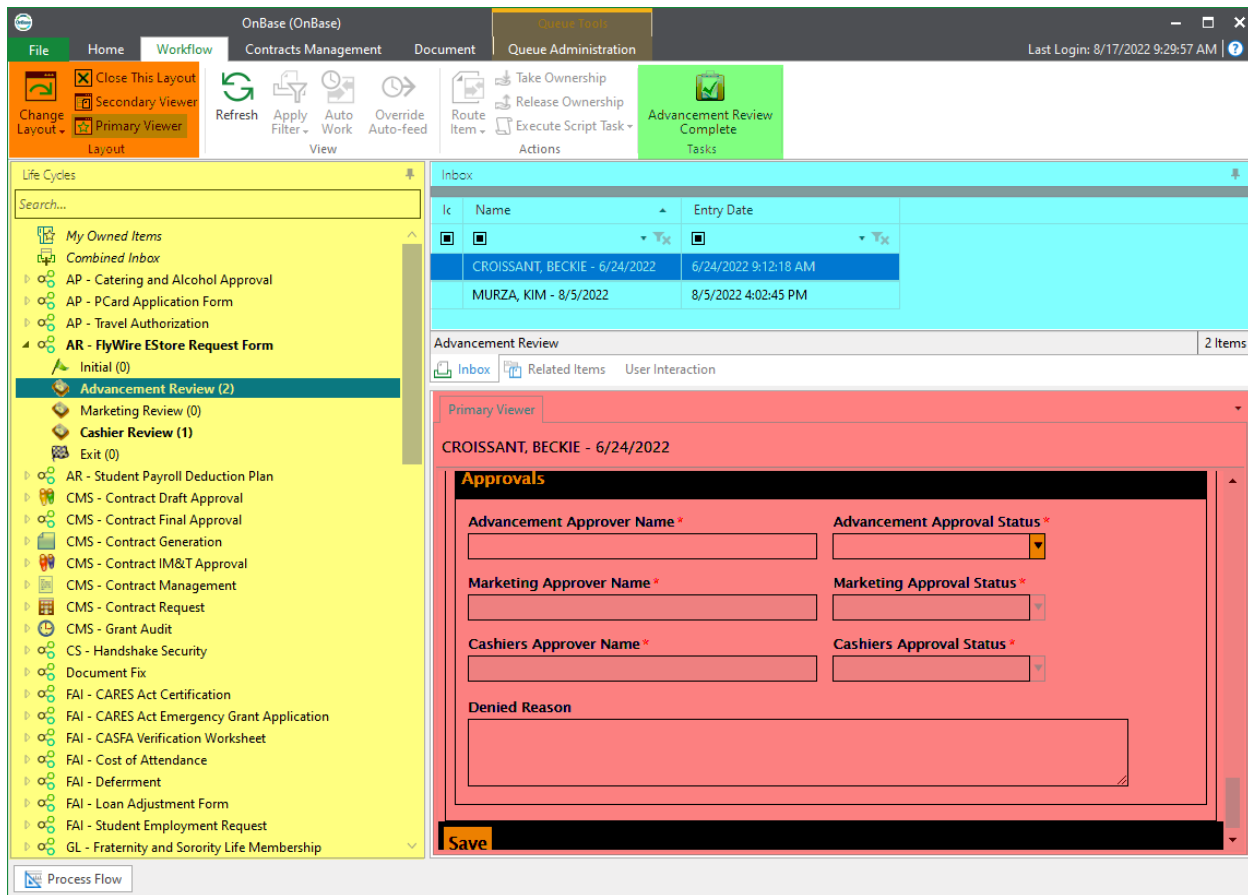
CROISSANT, BECKIE - 6/24/2022

Approver Name	Approval Status
Advancement Approver Name *	Advancement Approval Status *
Marketing Approver Name *	Marketing Approval Status *
Cashiers Approver Name *	Cashiers Approval Status *

Denied Reason

Save

The Workflow menu houses all submitted forms in their applicable workflows. Workflows are custom designed control structures that mirror the approval processes of paper forms.



- **Life Cycles**: users can view all workflows they have permission to access in this list. Workflow queues are where documents reside awaiting approval in a workflow, once they are approved or denied in a queue, such as Advancement Review in the above example, the document will move on to the next queue, in this case Marketing Review, or the Exit queue if the document is denied.
- **Inbox**: after clicking a queue the inbox displays all documents that a user has access to within that workflow queue, from here users can select which document to review.
- **Primary Viewer**: the primary viewer allows users to review and edit information on a submitted form. Often users will need to add their information and mark a form approved or denied using this viewer. To save modified information on a form click “Submit” or “Save”. The primary viewer **must** be toggled on using the **Layout** controls in the top left corner of the navbar.
- **Tasks**: in this area users can view what actions they have available on a form. In our example, once a user has modified the approval keyword on the form using the document viewer, they will save the form and then click “Advancement Review Complete”. The workflow logic will then process the document and route it to the correct queue, Marketing Review if approved, Exit if denied.

## Workflow: Queue Administration

Queue Administration allows department OnBase Admins to view and correct document ownership and assignment in queues that employee an ownership model. This menu can be



accessed if a user is designated as an OnBase functional admin, other users will not be able to access this functionality or select the Queue Administration tab or task.

The screenshot displays the OnBase Queue Administration interface. The top navigation bar includes tabs for File, Home, Workflow, Contracts Management, Document, and Queue Tools. The Queue Tools tab is active, showing a sub-tab for Queue Administration. The main window is titled 'Workflow Queue Administration - Dean/AVP Review'. It features a left sidebar with a search bar and a list of 'My Owned Items' including 'AP - Catering and Alcohol', 'AP - PCard Application', 'AP - Travel Authorization', 'Initial (0)', 'FOAP Review (0)', 'ASC Review (0)', 'Dean/AVP Review (0)', 'VP Review (0)', 'CIE Review (1)', 'Grants Review (0)', 'Foundation Review (0)', 'Accounts Payable P...', 'Accounts Payable Pe...', 'Accounts Payable R...', 'Exit (0)', 'AR - FlyWire EStore R...', 'AR - Student Payroll De...', 'CMS - Contract Draft A...', 'CMS - Contract Final A...', 'CMS - Contract Genera...', 'CMS - Contract IM&T A...', 'CMS - Contract Manag...', 'CMS - Contract Reques...', 'CMS - Grant Audit', 'CS - Handshake Secur...', 'Document Fix', and 'FAI - CARES Act Certification'. The main area shows a list of 'Load Balance Members (24)' with a search bar and a table of queue items. The table has columns for ID, Name, Entry Date, Owner, and Sign. The first row shows ID 217108, Name 6/24/2022 - Peterson, Bridgette, Entry Date 7/20/2022 8:40:39 AM, and Owner. The bottom status bar indicates 'Type: Document', 'Filtered by: <None>', 'Load Balance (Match Keyword to User Name)', and 'Ownership'.

## How to request an OnBase form for your department

If you or your department have a paper process that would benefit from being digitized, please email [help@unco.edu](mailto:help@unco.edu) and a member of IMT&T will be in contact to discuss how best to adapt your paper process to a digital one.

## Further questions

If you have any questions regarding OnBase or have any trouble with a form, workflow, or the OnBase Unity applications please email [help@unco.edu](mailto:help@unco.edu) or [robert.carver@unco.edu](mailto:robert.carver@unco.edu)

## Frequently Asked Questions

TBD