Contract Management System Fund Approver Training Guide

Version 2.0
June 3, 2016

This document contains detailed instructions on how to approve or deny a contract, contract amendment, contract renewal, or contract termination using the new OnBase Contract Management System. The approval process is the same for all of the before mentioned contract document types, so for each, this document refers to everything as a contract.

The OnBase Contract Management system is a tool that allows the University to track contract documents from the time of request through execution, renewal, and termination. As a Fund Approver, you are responsible for the approval of contracts using the OnBase Contract Management System. Your approval allows the contract to be sent to the appropriate UNC authority for actual signature. *Note:* As a Fund Approver, you do not have signature authority for University contracts unless you have been given specific delegation to do so. All delegations are filed in the Purchasing & Contracts Office.

How to Approve or Deny a Contract

As the Fund Approver, you will receive an email notification when there is a contract that requires your approval. The email will state who submitted the contract request, the company with which the University is contracting, and a brief description of the purpose of the contract. The email also contains contact information for the Contract Lead as well as instructions about how to approve the contract.

In order to Approve or Deny the contract, you are required to log into the Hyland OnBase Unity Client. The icon for the system is pictured below.
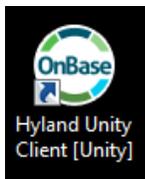
You will be required to log into the Unity Client. When the login screen opens, select "OnBase PROD" in the first field. Once you select OnBase PROD, the second box will populate with UNCO1 automatically. Your user name will also populate after the first time you log on. If you are using someone else's computer, you can type your FIRST.LAST name in the third field. In the last field, next to the padlock icon, type in the same password you have to log into your computer.
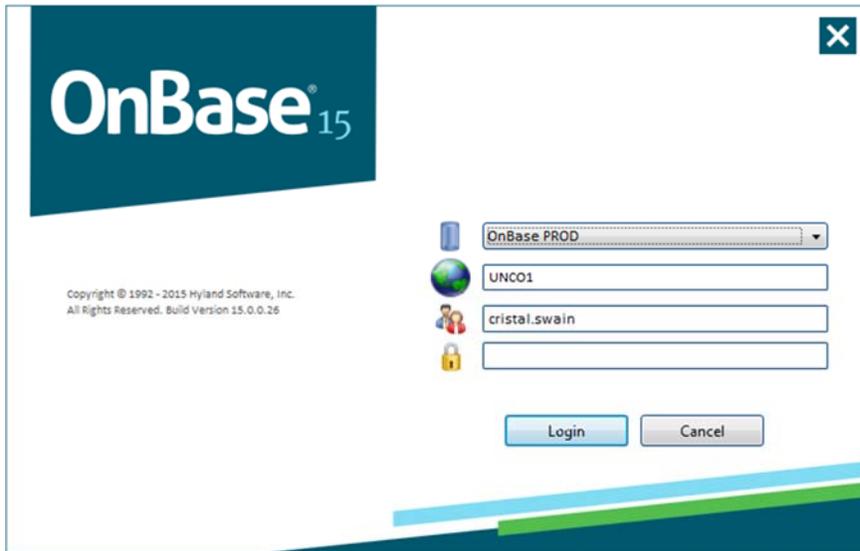
Once you have logged into the OnBase Unity Client, the following screen will appear.
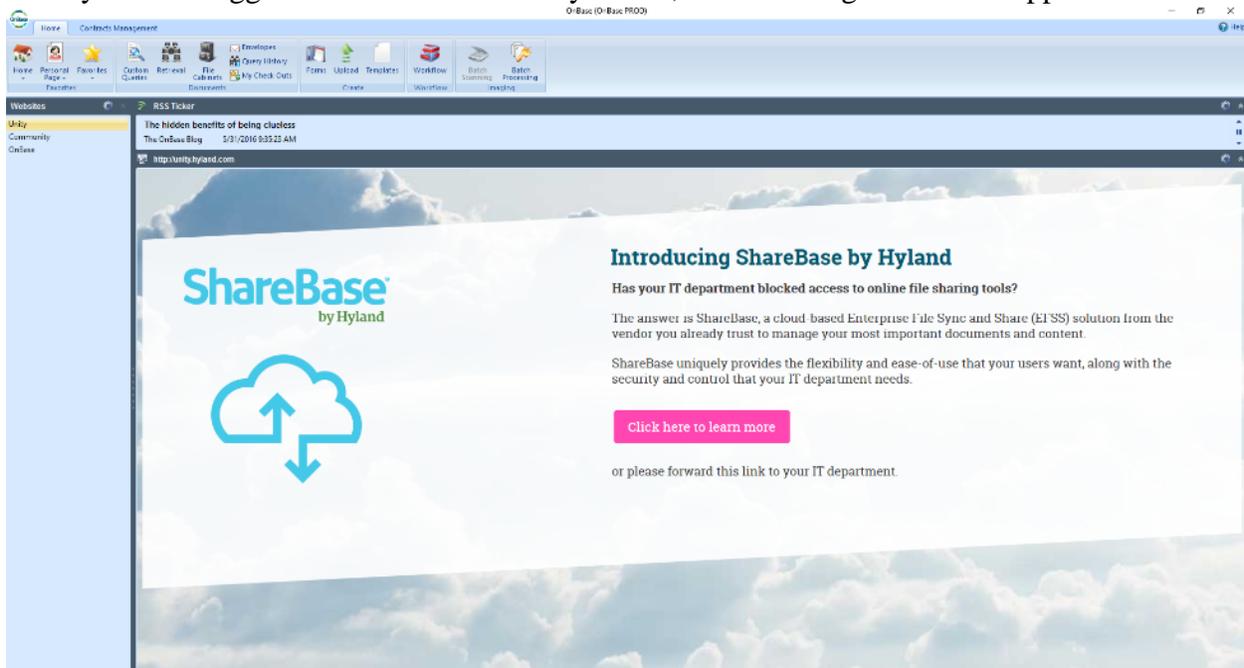
From this screen, you will select "Workflow" in the ribbon at the top of the screen.
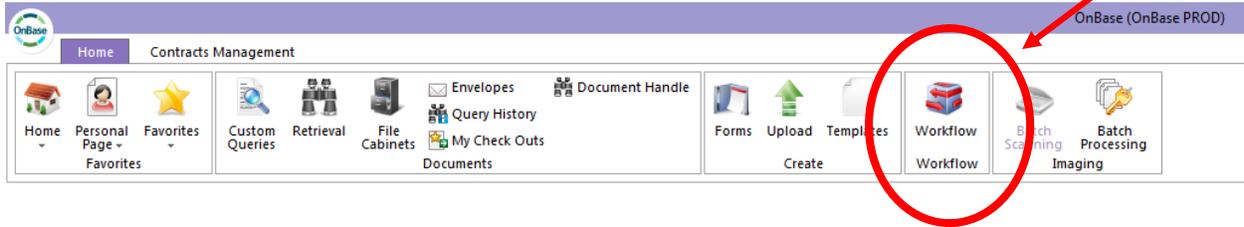
The following screen will appear. Under the ribbon bar, you will see a list of contracts that require your approval. If no contracts appear on this screen, please click on CMS-Contract Final Approval on the left hand side of the screen (see the green circle on the picture below).
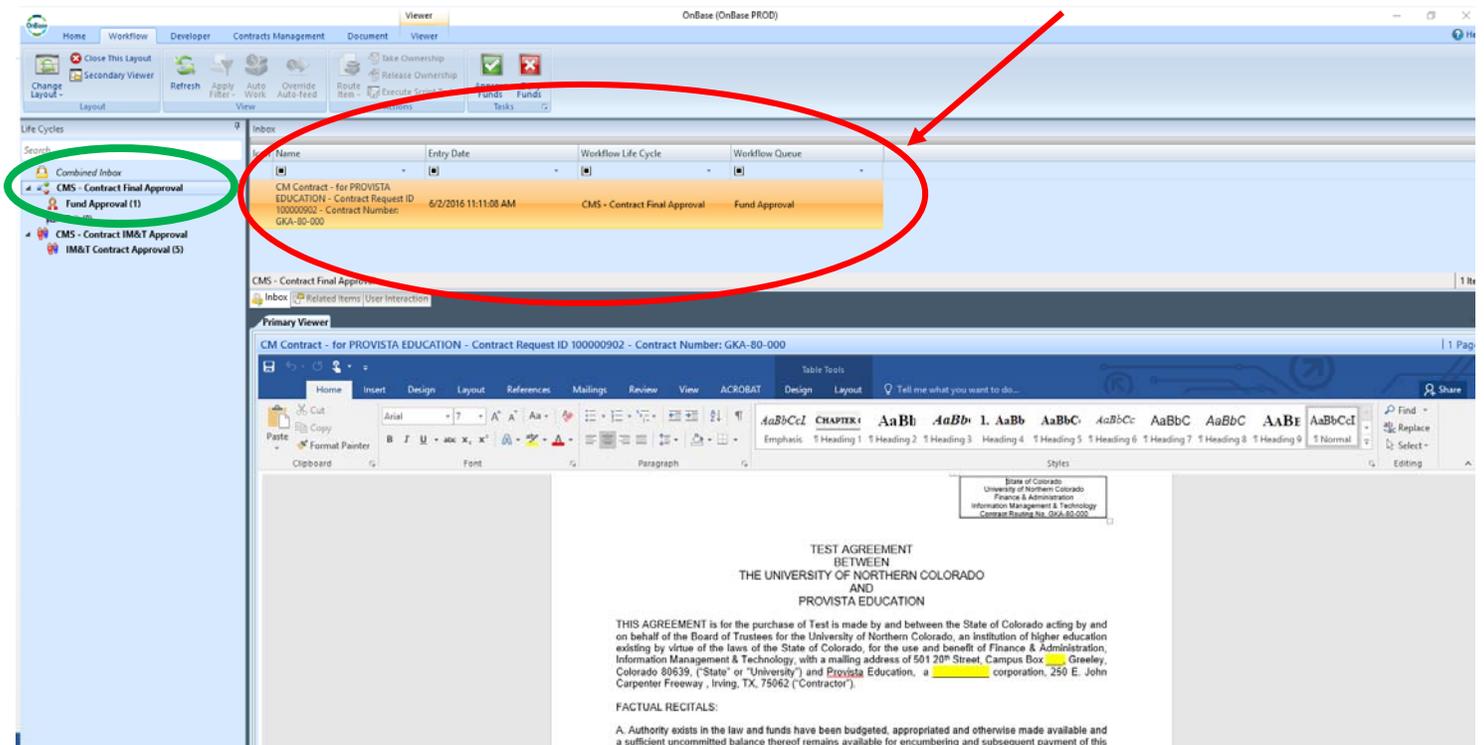
Please select the contract you want to review/approve/deny by clicking on the contract in the list. Once you click on the contract, the contract document will show in the pane at the bottom of the screen.

After you review the contract document, you can approve or deny the contract, by clicking on the "Approve Funds" or "Deny Funds" in the ribbon at the top of the screen (see below).

If you deny the contract, you will be prompted to type the reason for the denial. This message will be sent to the Purchasing & Contracts Office so they can take the appropriate action to cancel the contract process or make the requested modifications.

Example of a comment:
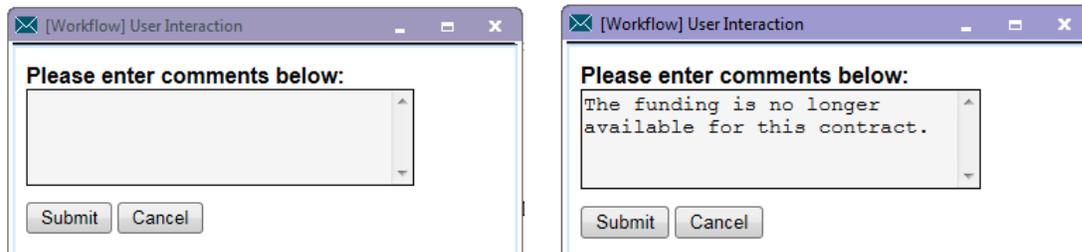
Once you have Approved or Denied your contracts, you can close OnBase by clicking on the "X" in the upper right corner of the OnBase screen. This will log you out of the system.