Official Function Approver Guide

Version 1.0
September 4, 2018

This document contains detailed instructions on how to approve or deny an Official Function request in OnBase. The approval process is the same regardless of whether you are approving as the Department Approver, FOAP Approver, Official Function Approver, Provost or CFO. The only difference in the processes is the folder that the approver will select based on their approval role in the system. ***Note**: One person can serve as more than one approval role in the system. For instance, you can be both the Department Approver and the FOAP Approver.*

OnBase is a tool that allows the University to track and submit Official Functions Forms, also known as an OFF. Your approval allows the Official Function to proceed, assuming all other required approvals are received.

How to Approve or Deny an Official Function Request

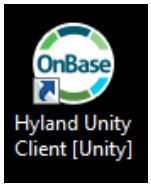
As an approver in the Official Function process, you will receive an email notification when there is an Official Function request that requires your approval. The email will state the:

- Event Host;
- Event Name;
- Event Date(s);
- Maximum Allowable Spend; and
- FOAP

In addition to the information above, the Provost and CFO email notifications will include the:

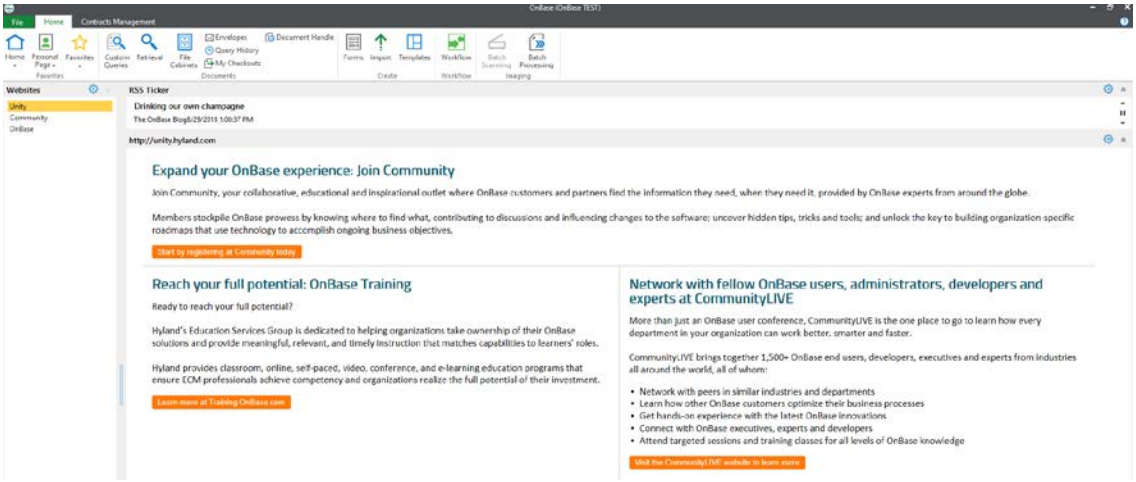
- Official Function Type;
- College or Division;
- Department;
- If the Dean/AVP is participating in the event;
- If there is a request to serve alcohol; and
- Expenditure Types

In order to review and approve or deny the Official Function request, you are required to log into the Hyland OnBase Unity Client. The icon for the system is pictured below.

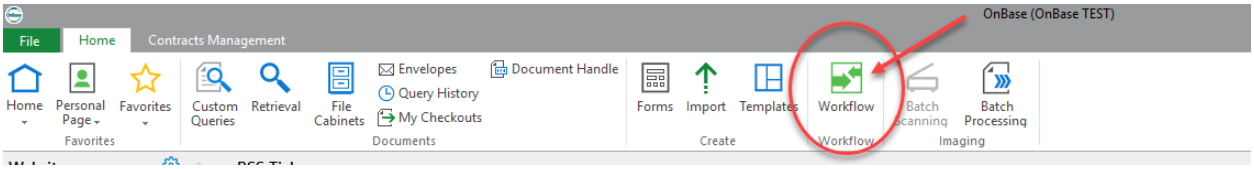


Once you click on the OnBase link to launch the program, you will be taken to the login screen, below. On this screen, select "OnBase PROD" in the first field. Once you select OnBase PROD, the second box will populate with UNCO1 automatically. Your user name will also populate after the first time you log on. If you are using someone else's computer or this is the first time you are logging in to OnBase, 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.

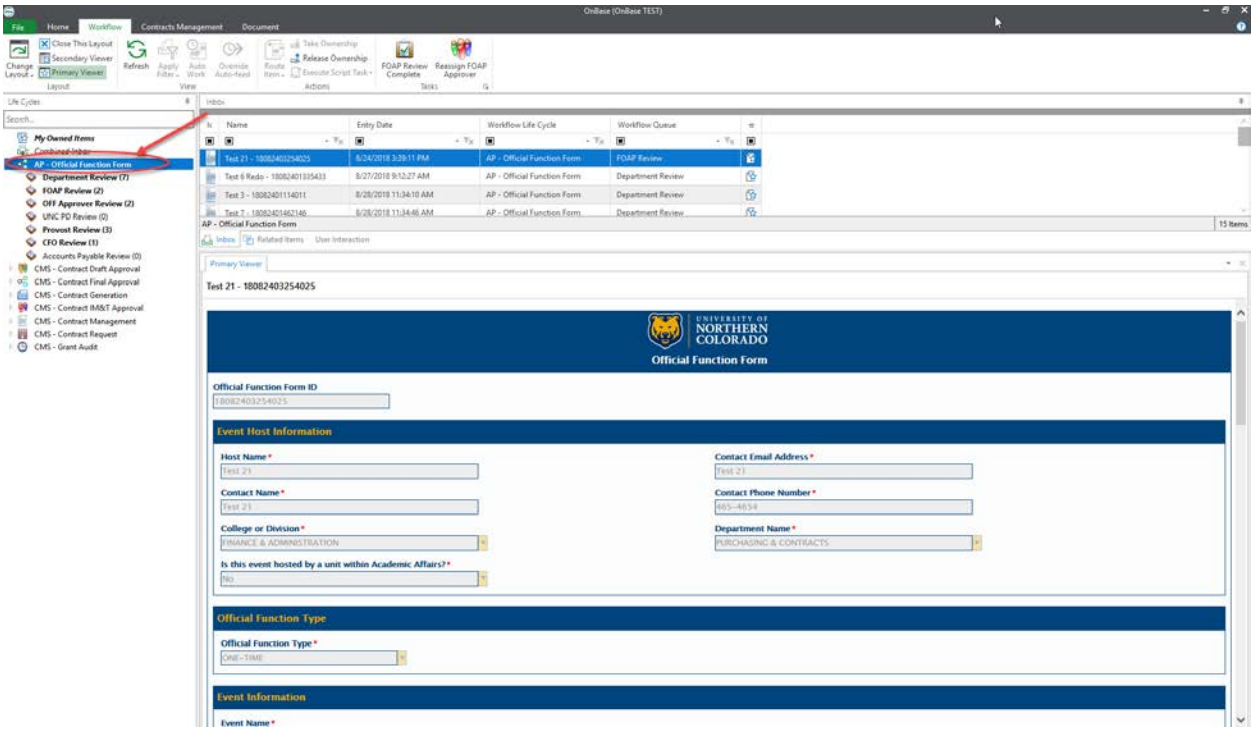
Once you have logged into the OnBase Unity Client, the following screen will appear.



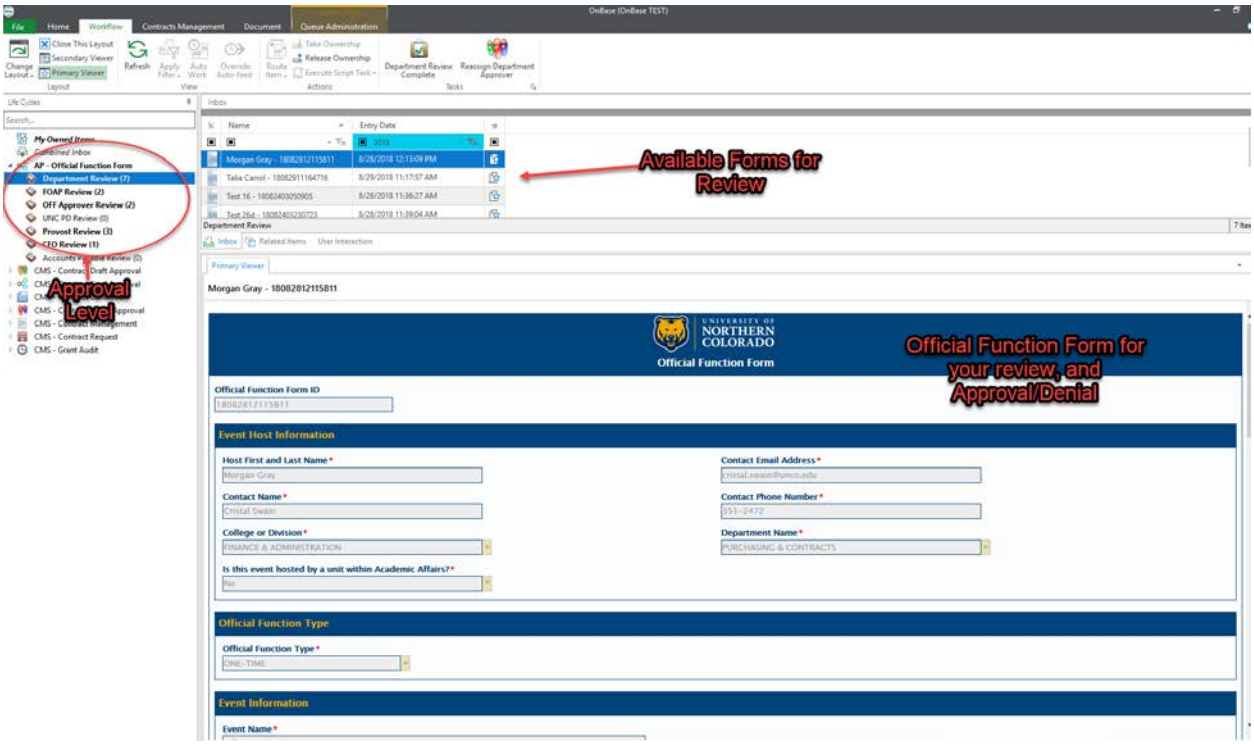
From this screen, you will select "Workflow" in the ribbon at the top of the screen.



Once you select Workflow, the following screen will appear. From this screen, you will navigate the folders on the left side of the screen by selecting AP- Official Function Form. Once you click on this folder, you will see all approval queues that you have access to. The queues that have forms for your review and approval/denial will be bolded with the number of Official Function forms waiting your approval listed to the right in parentheses.

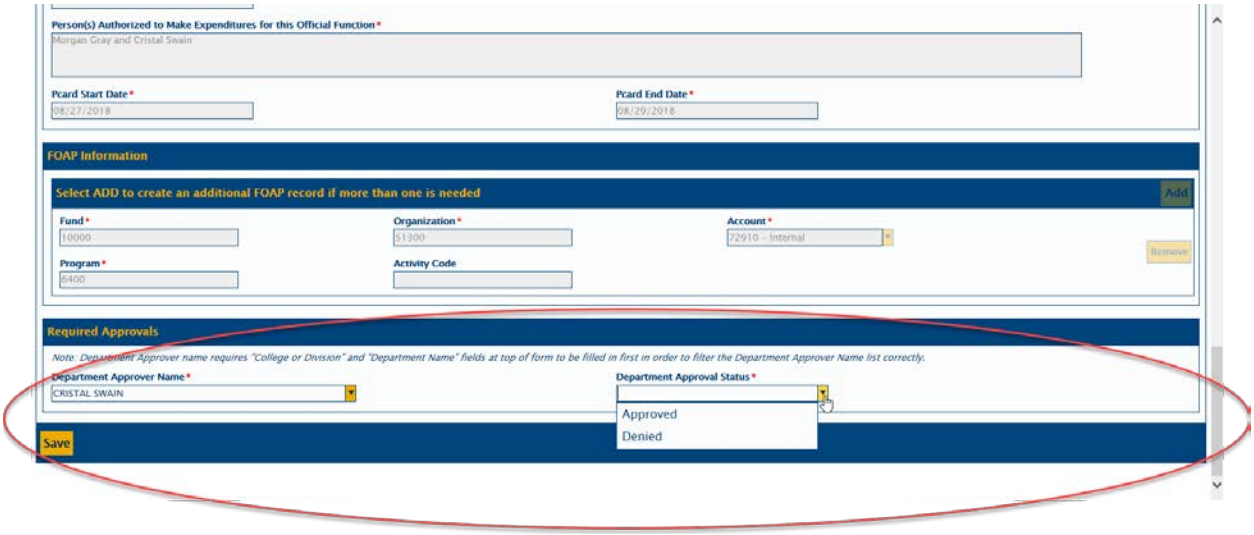


To review and approve or deny the Official Function request, select the folder with the form located within it. Once you click on that folder, you will see all available request forms in the pane on the right. The Official Function Form will be located directly below this list. To navigate between forms, you can click on the row at the top of the screen with the form you want to review.

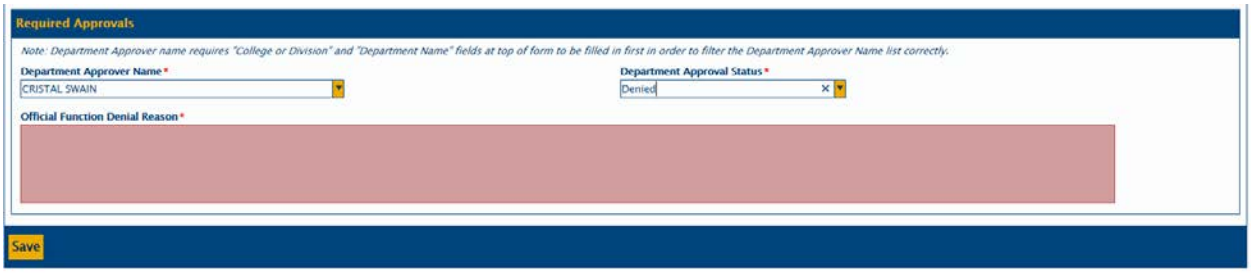


If you would like to expand the view of the Official Function form so that you can see more at one time on your screen, click on the line between InBox and Primary Viewer and drag the bar up on the screen. After you do this once, the setting will remain the same when you login in the future.

To review the Official Function, use the scroll bar on the bottom half right side of the screen. At the bottom of the screen, you will be prompted to approve or deny the request.

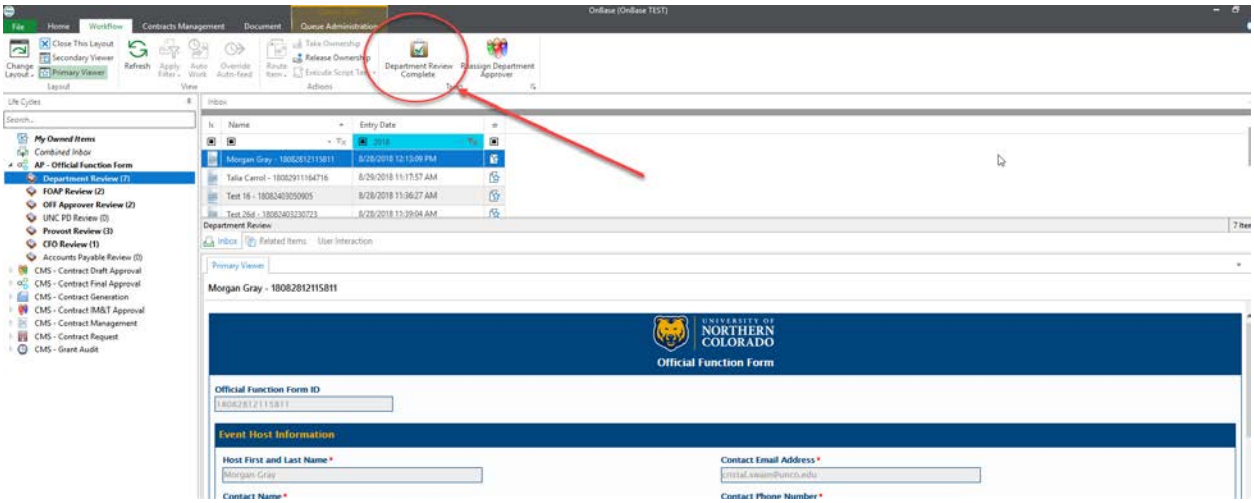


Note: If you deny the Official Function request, you will be prompted to state why you are denying the request. This reason will be shared with the Contact Person listed on the form as soon as you complete your review.



Once you have selected Approved or Denied (and completed the Official Function Denial Reason if applicable), click save on the bottom of the screen.

After clicking Save, you **must** click on the Department Review Complete, FOAP Review Complete, OFF Review Approver Review Complete, Provost Review Complete, or CFO Review Complete, whichever is applicable to the approval level you are fulfilling. The Review Complete button is located on the same place on the screen regardless of your approval level. ***If you fail to click this button, the form will not be sent to the next queue for processing.***

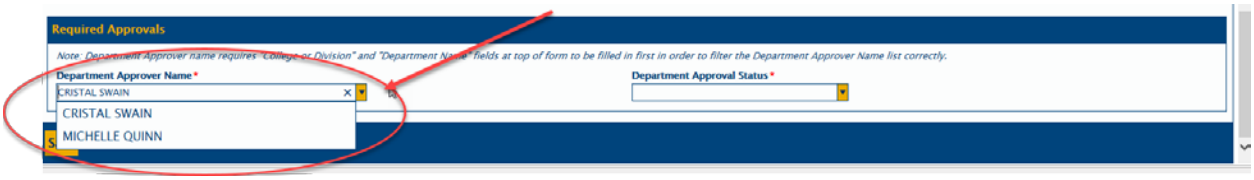
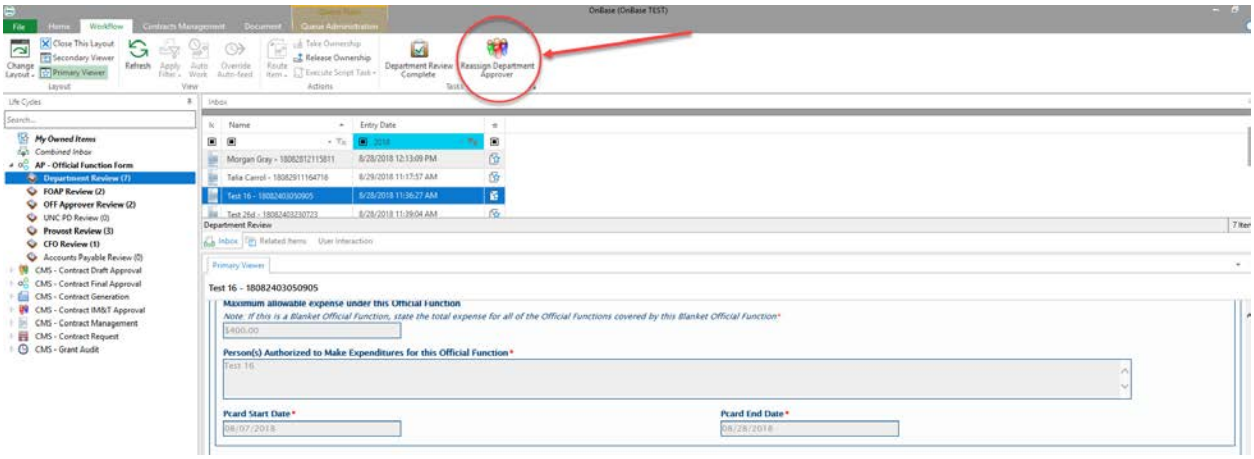


Once you have clicked on this button, the form will automatically be routed to the next queue, and the appropriate approver will be notified via email. If you are the next approver, you do not have to wait for the email to arrive notifying you that you have an Official Function request to review, you can simply click on the appropriate folder on the left side of the screen and follow the same steps as listed above. Once the Official Function request has received all required approvals, it will be routed to Accounts Payable for processing. Once that processing is complete, the Contact Person will be notified that their Official Function request has been fully approved.

Once you have Approved or Denied your Official Function requests, 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.

Changing Approvers

If in your review you determine that you are not the correct approver in the process, you have the ability to reassign the approver within the form. To complete this reassignment, you will select the Official Function form as you did in the instruction above. Instead of selecting Approved or Denied in the drop down box, you will select a new approver from the drop down box and click Save.



After clicking on the Save button, click on the Reassign Approver button to the right of the Review Complete button. The text of this button will change to the appropriate approver type depending on where the form is in the approval queue and no longer be available for you to review and approve or deny.