

Official Function Guide to Submit and Retrieve Existing Forms

Version 1.0

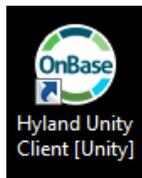
September 5, 2018

Through the new OnBase Official Function process, you will submit, check the status of, and otherwise retrieve Official Function Forms (“OFF”). This document contains detailed instructions on how to submit, retrieve, and check the status of any OFF submitted via OnBase. The Official Function Approver Guide provides step-by-step instructions for how to approve an OFF in OnBase.

How to Submit Form

In order to submit retrieve an OFF, you can either go to <https://onbase.unco.edu/AccountsPayable/OfficialFunctionForm> or log in to the Hyland OnBase Unity Client. These instructions outline how to submit an OFF in the OnBase application, but the form submission process is the same for both the OnBase application and the web form.

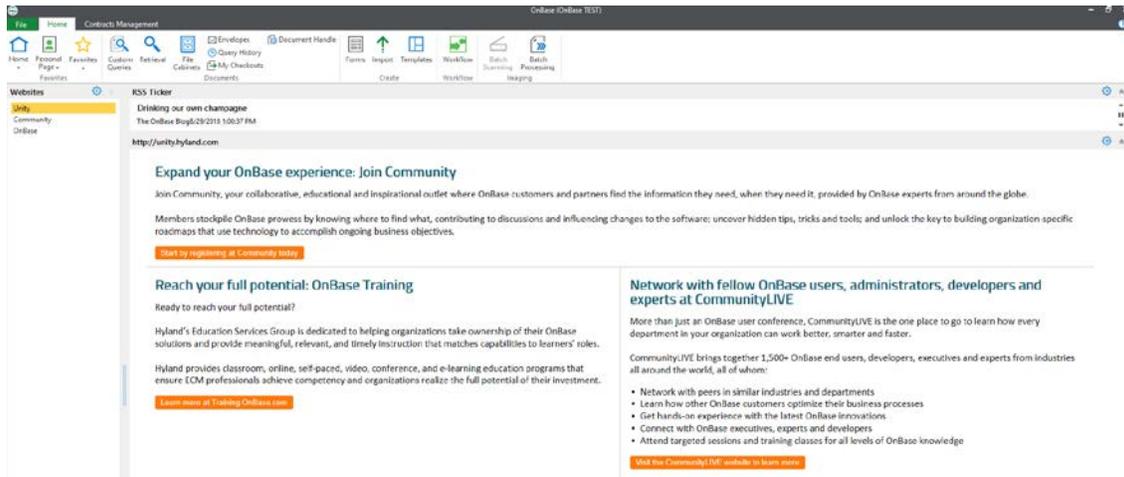
To enter an OFF using the OnBase application, you will launch the OnBase application by selecting the OnBase icon from your desktop. The icon for the system is pictured below.



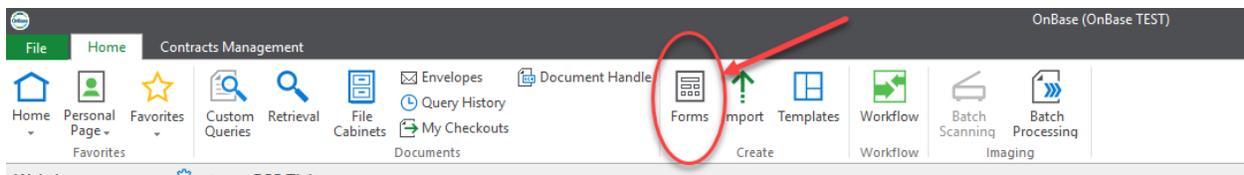
Once you click on the OnBase link to launch the program, you will be taken to the login screen, below. On this screen, select “OnBase PROD” in the first field. Once you select OnBase PROD, the second box will populate with UNCO1 automatically. Your user name will also populate after the first time you 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.



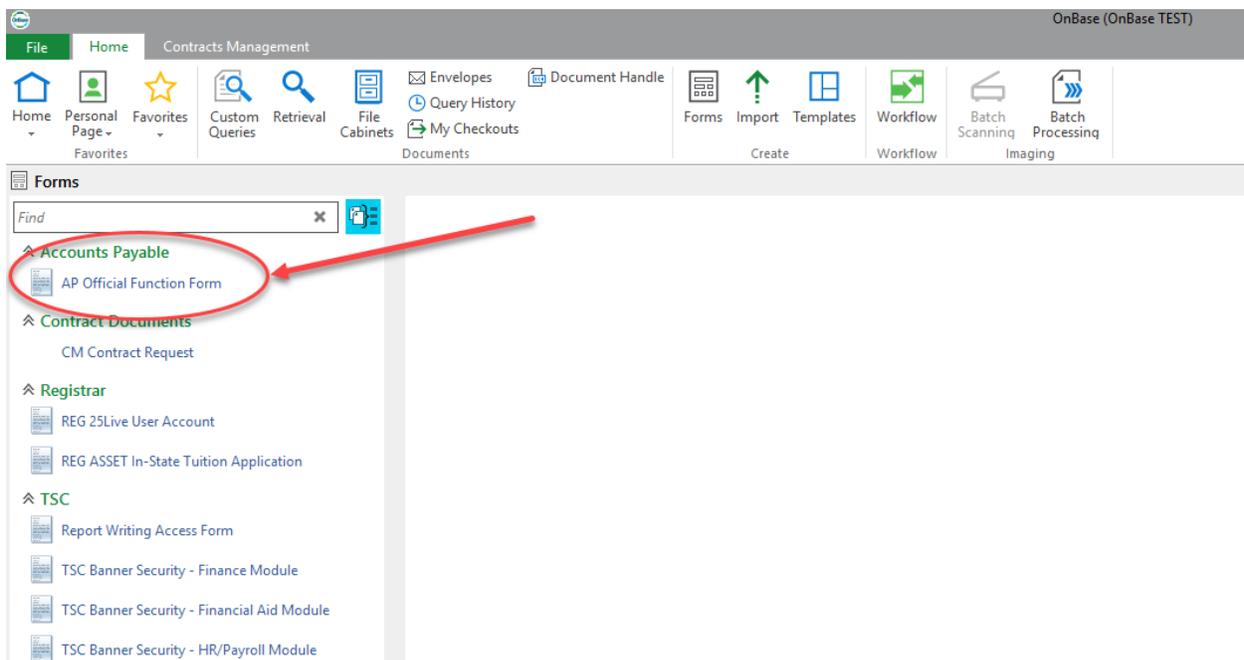
Once you have logged into the OnBase Unity Client, the following screen will appear.



From this screen, you will select “Forms” in the ribbon at the top of the screen.



Once you select Forms, the following screen will appear. From this screen, click on the AP Official Function Form under the Accounts Payable section on the left side of the screen.

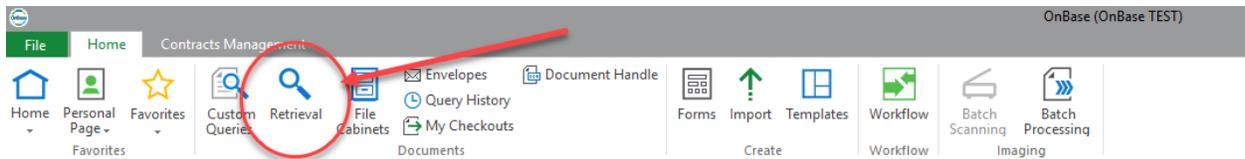


Once you select this option, the form will appear on the right side of the screen. Complete all information on the form and click on Submit on the bottom of the form. This will start the routing and approval process for the OFF.

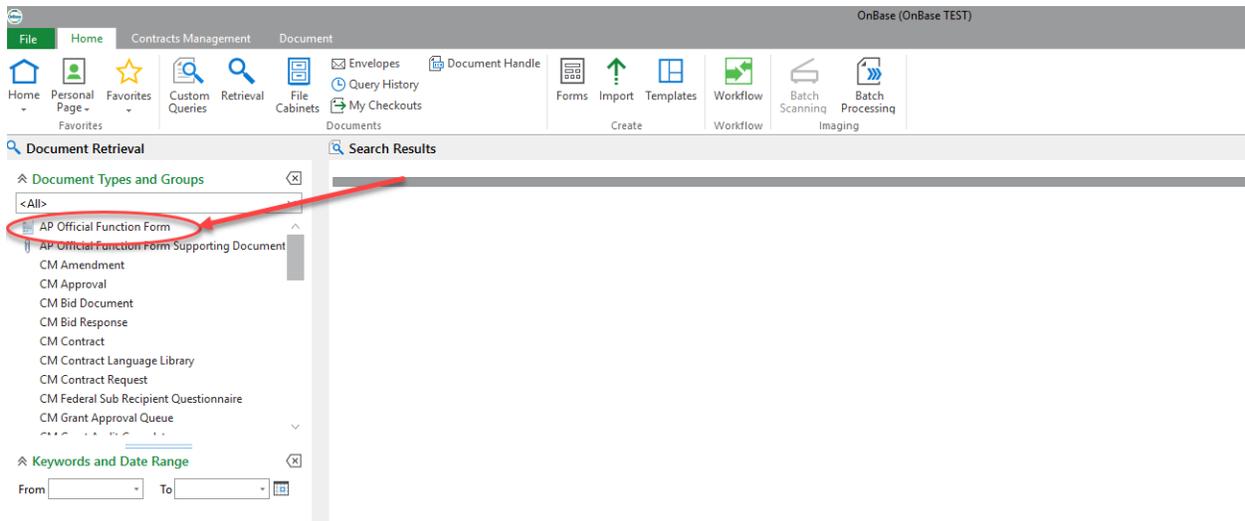
The screenshot shows the 'AP Official Function Form' in the OnBase application. The form is titled 'Official Function Form' and is part of the 'AP Official Function Form' document. It contains several sections: 'Event Host Information' with fields for Host First and Last Name, Contact Email Address, Contact Name, Contact Phone Number, College or Division, and Department Name; 'Official Function Type' with a dropdown menu; 'Event Information' with fields for Event Name, Event Location, Event Start/End Dates, and a checkbox for 'Will alcohol be served at the event?'. There are also text areas for listing attendees and stating why the event is being held. The interface includes a top ribbon with various icons and a left sidebar with a search bar and a list of forms.

How to Retrieve an OFF from OnBase

In order to retrieve and check the status of an OFF, you are required to log in to OnBase. Once you are logged in to OnBase, select the “Retrieval” icon from the ribbon at the top of the screen.



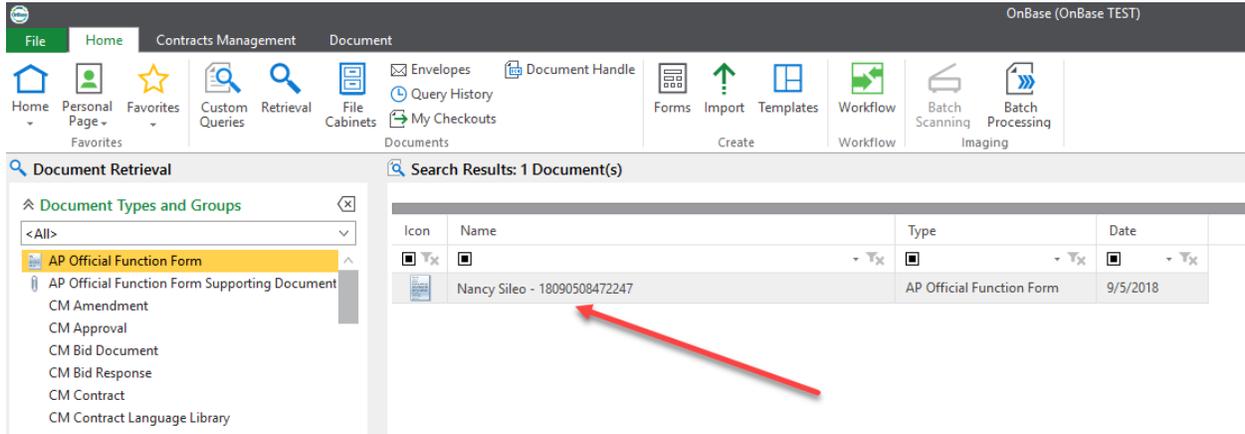
Once you select Retrieval, the following screen will appear. To retrieve and/or check the status of an OFF, select AP Official Function on the left side of the screen.



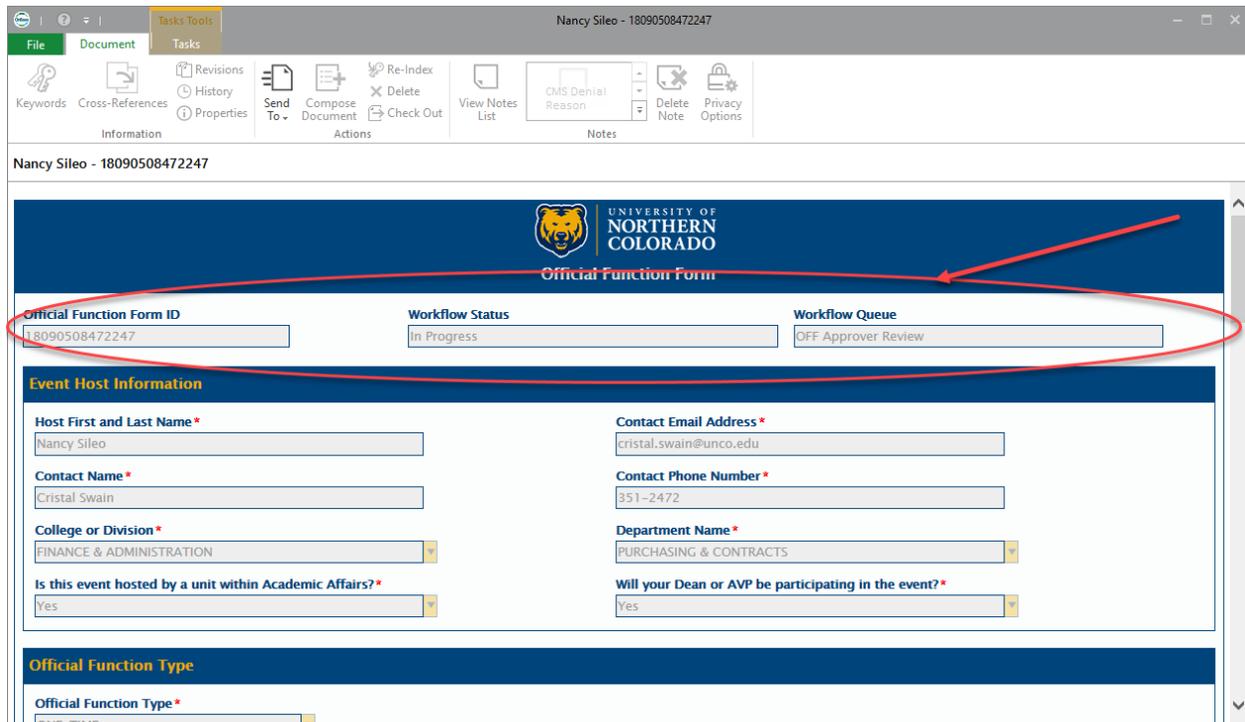
Once you select AP Official Function Form, you will have access to retrieve Official Functions using almost any field that is available on the OFF. *Note: You must type the information exactly the same as it was on the OFF or it will not retrieve any results.* Once you have entered your key word(s), select find at the bottom of the screen.

The screenshot displays the OnBase (OnBase TEST) interface. The top navigation bar includes 'File', 'Home', 'Contracts Management', and 'Document'. The 'Document' ribbon contains various tools like 'Envelopes', 'Document Handle', 'Forms', 'Import', 'Templates', 'Workflow', 'Batch Scanning', and 'Batch Processing'. The main area is divided into 'Document Retrieval' and 'Search Results'. Under 'Document Retrieval', the 'Document Types and Groups' list has 'AP Official Function Form' selected. Below it, the 'Keywords and Date Range' section features several search fields: 'OFF Request ID', 'Host Name' (with 'Nancy Sileo' entered), 'Contact Name', 'Contact Email Address', 'Contact Phone Number', 'College or Division', 'Department Name', 'OFF Academic Area', 'OFF Event Hosted by Dean or AVP', 'Official Function Type', 'Alcohol Served', and 'Alcohol Served Location'. A red arrow points to the 'Contact Email Address' field with the text 'Enter a Keyword in this section of the page'. At the bottom, a red circle highlights the 'Find' button, with a red arrow pointing to it and the text 'Select "Find" after entering your keyword to retrieve available records that meet your search criteria'.

Once you select find, any records that match your criteria will appear on the right side of the screen. To open the OFF, click on the row that contains the OFF you want to review.



The OFF will then appear in a new screen. You can check the status of the OFF at the top of the page.



To see which approver in that queue has been tasked with approving the OFF, scroll to the bottom of the OFF.

Required Approvals

Note: Department Approver name requires "College or Division" and "Department Name" fields at top of form to be filled in first in order to filter the Department Approver Name list correctly.

| | |
|--|---|
| Department Approver Name CRISTAL SWAIN | Department Approval Status Approved |
| FOAP Approver Name CRISTAL SWAIN | FOAP Approval Status Approved |
| OFF Approver Name CRISTAL SWAIN | OFF Approval Status * |

Once you have finished reviewing the OFF, simply close the window and you will return to the Retrieval screen.

To logoff of Onbase, click on the "X" in the upper right corner of the OnBase screen. This will log you out of the system.



Note: When your OFF has been fully approved or denied, the Contact Person on the OFF will automatically receive an email notifying them that the form has been approved or denied.