INFORMATION TECHNOLOGY
Enterprise Application Systems

Hyland OnBase

AP/BP Submission for

Approval

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Accessing OnBase

If OnBase is not installed on your computer, please contact the Help Desk (x4357) for assistance.

The OnBase Unity client is not available to MAC users. *Mac users can use this link to access OnBase:* ***https://obpw01.msac.mtsac.edu/appnet***

To begin, locate and open the OnBase client.

1. Double click on OnBase Unity Client icon on your desktop.

2. Choose the **OnBase PRD** option from the drop down menu.

3. From here, fill out the username and password using your **Windows credentials**.

4. Press Enter key or **Login** option to login to OnBase.

OnBase Home Page

The Home Page is the default page after you log in. This page can be customized see instructions below.
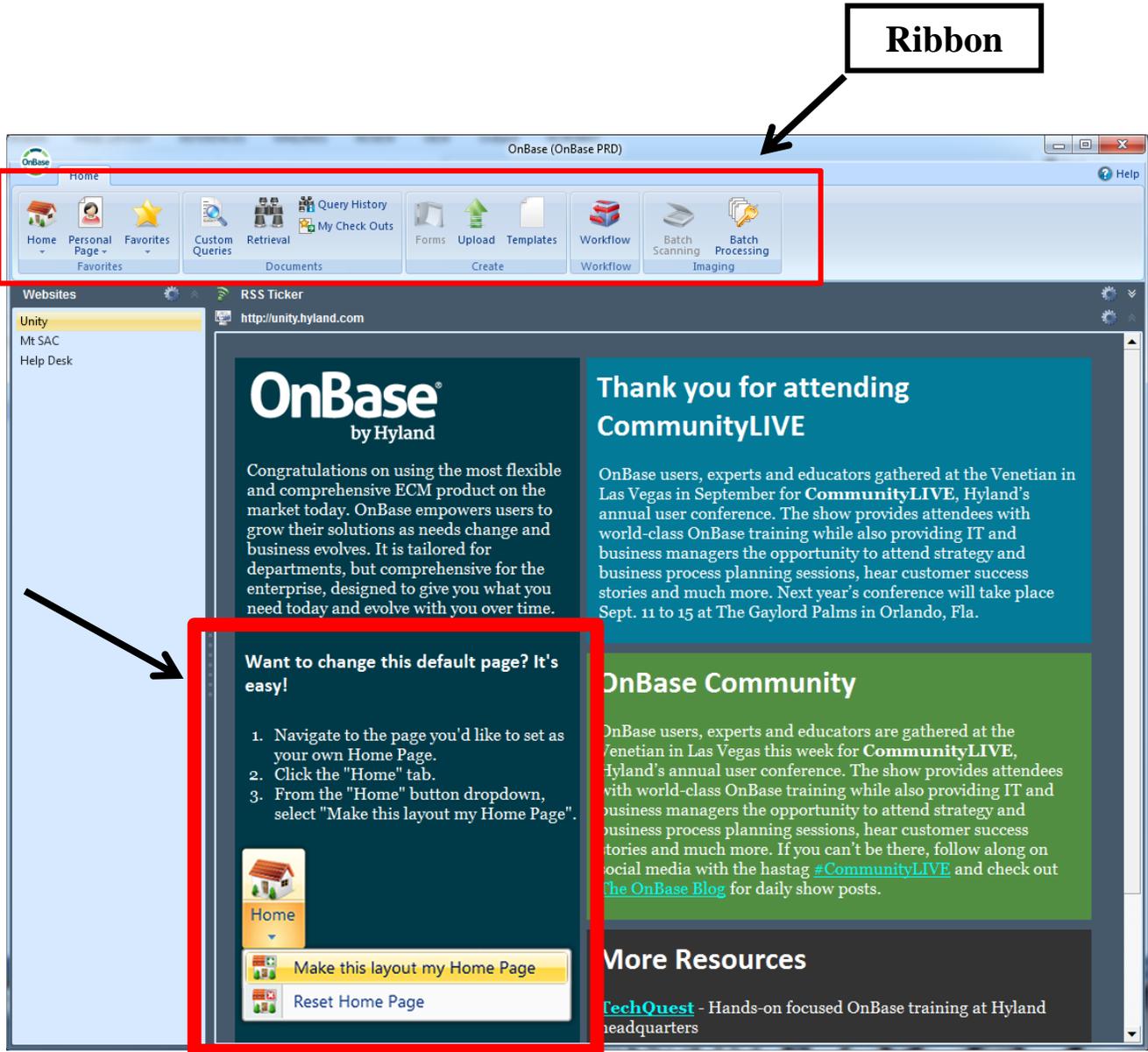
Retrieve AP/BP Document by Custom Query

Custom Query uses a search form to allow users to easily retrieve pre-existing documents in OnBase.

1. Start by clicking on the **Custom Queries** option in the ribbon.
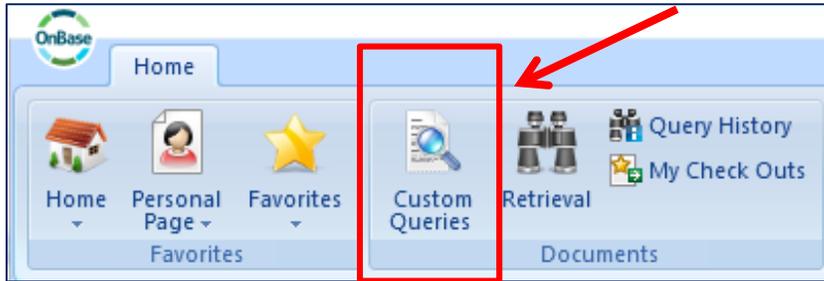
2. Click on the **BOT (Board of Trustees) Work in Progress <u>AP</u>** query for Administrative Procedures

   Or **BOT Work in Progress <u>BP</u>** for Board Policies.

Note: Query views vary. You will only see the Queries you have access to.
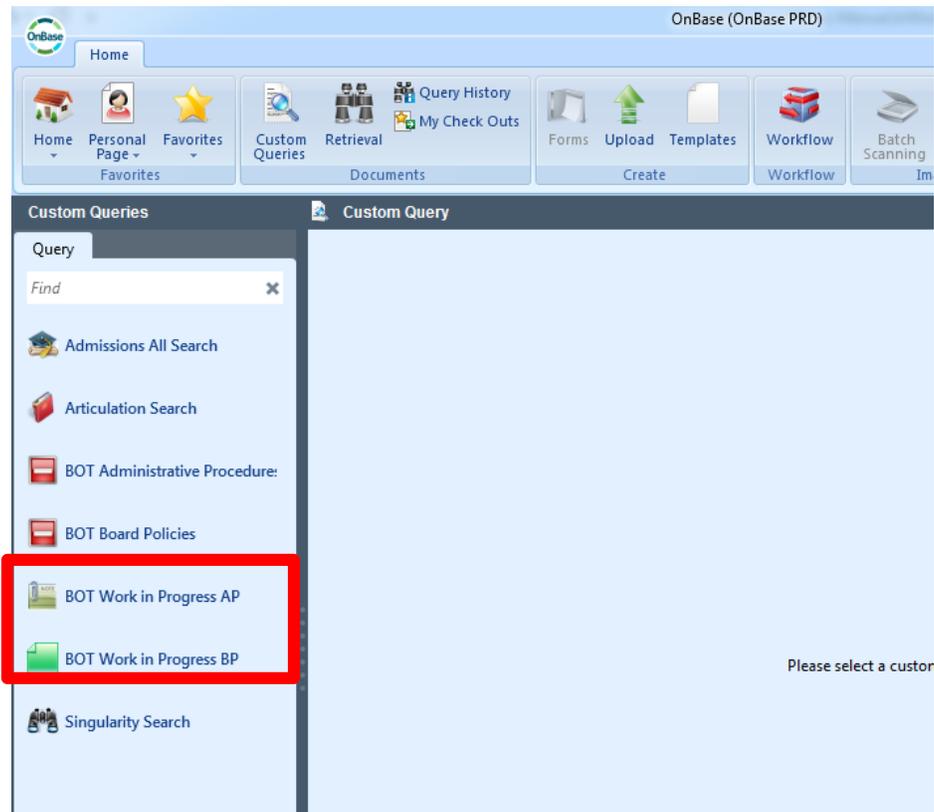
3. Fill in the **AP#** (required). The **AP Name** is optional. Then Press enter or click the **Search** option to display your results. Do the same for BPs.

    Note: You may use the asterisk (*) wild card in the fields below. The (*) represents one or more characters (i.e. a search for LA could bring up documents containing words such as Lane, Lake, or Lands.*
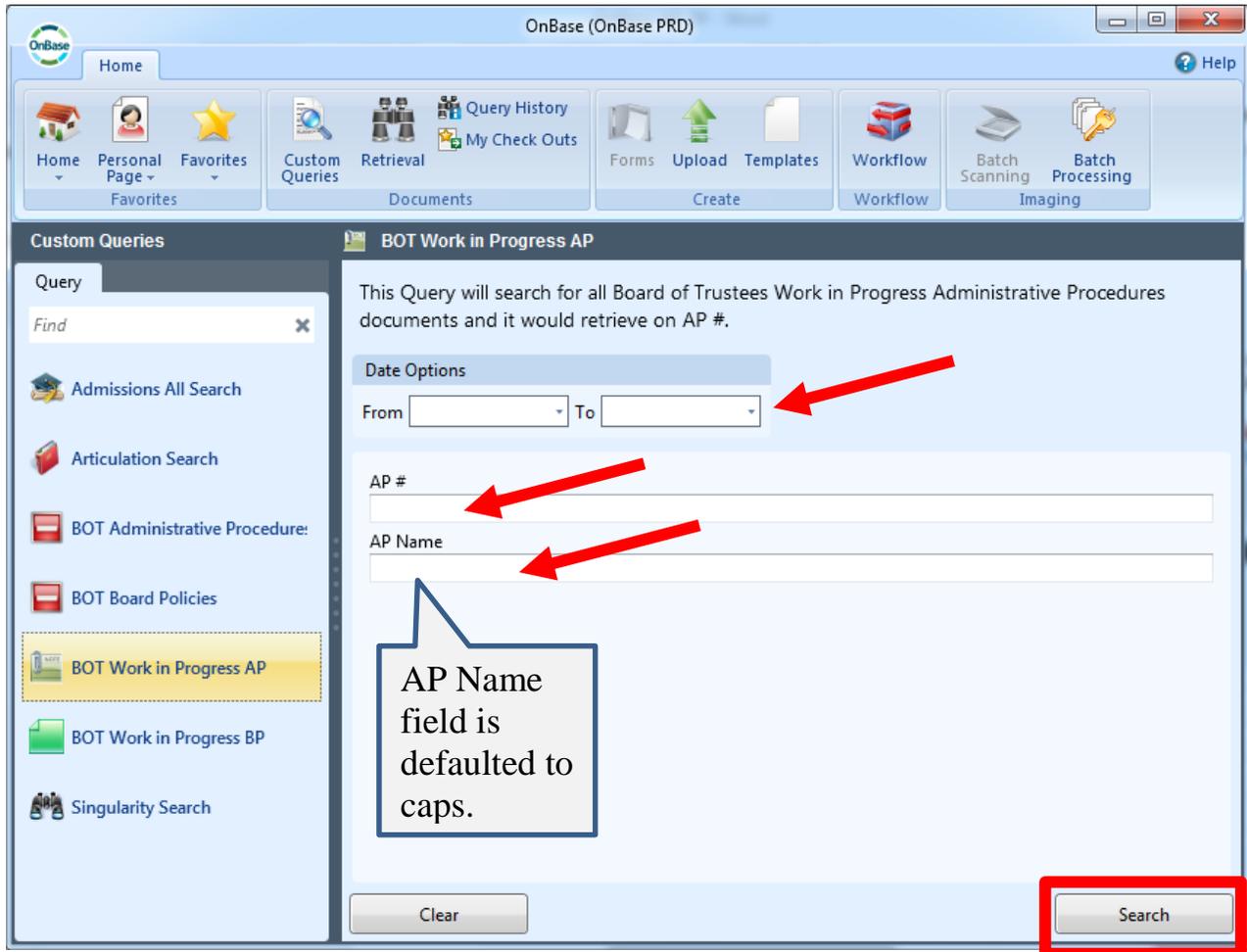
4. **Double click** on the document(s) that you want to view or edit. (Document will open in separate window).

*Note: In the results view below you can click on any of the **Column Titles** to rearrange documents in ascending or descending order.*
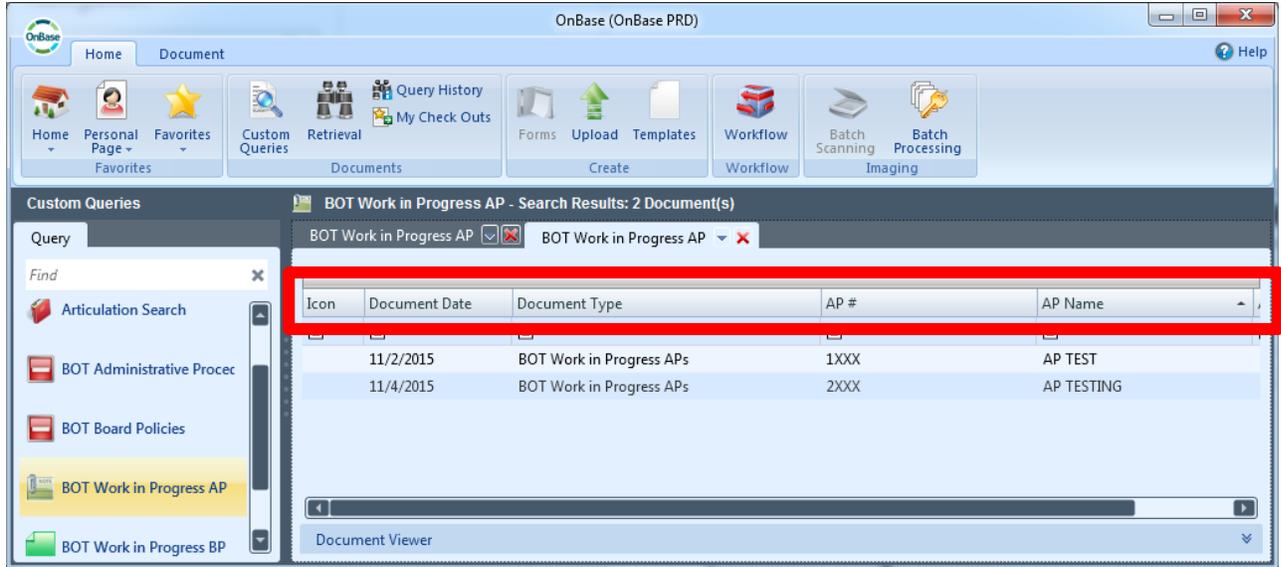
Document window:
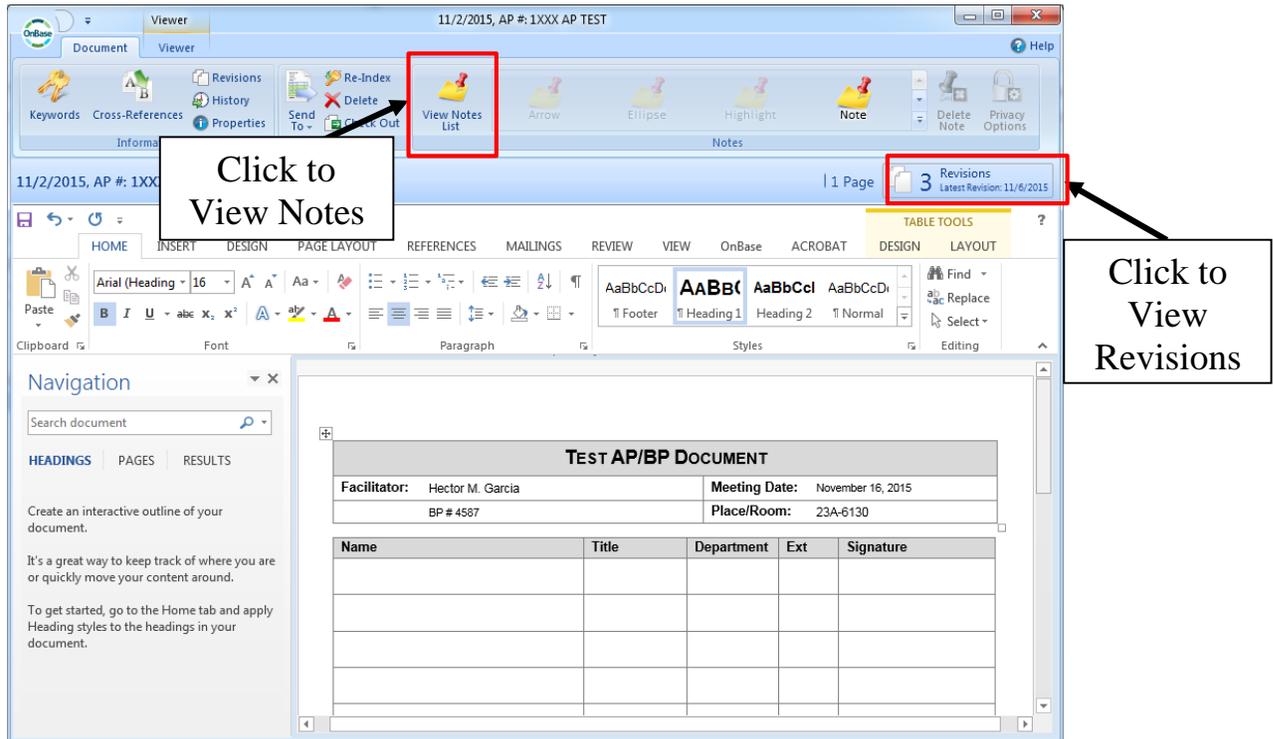
5. To begin a new search close the current document viewing window and return to custom query; repeat steps 2-4.

Edit AP/BP and Save

Once the document is open you can edit and see the revisions and notes attached to the document.

1. Edit as you would in Microsoft Word.
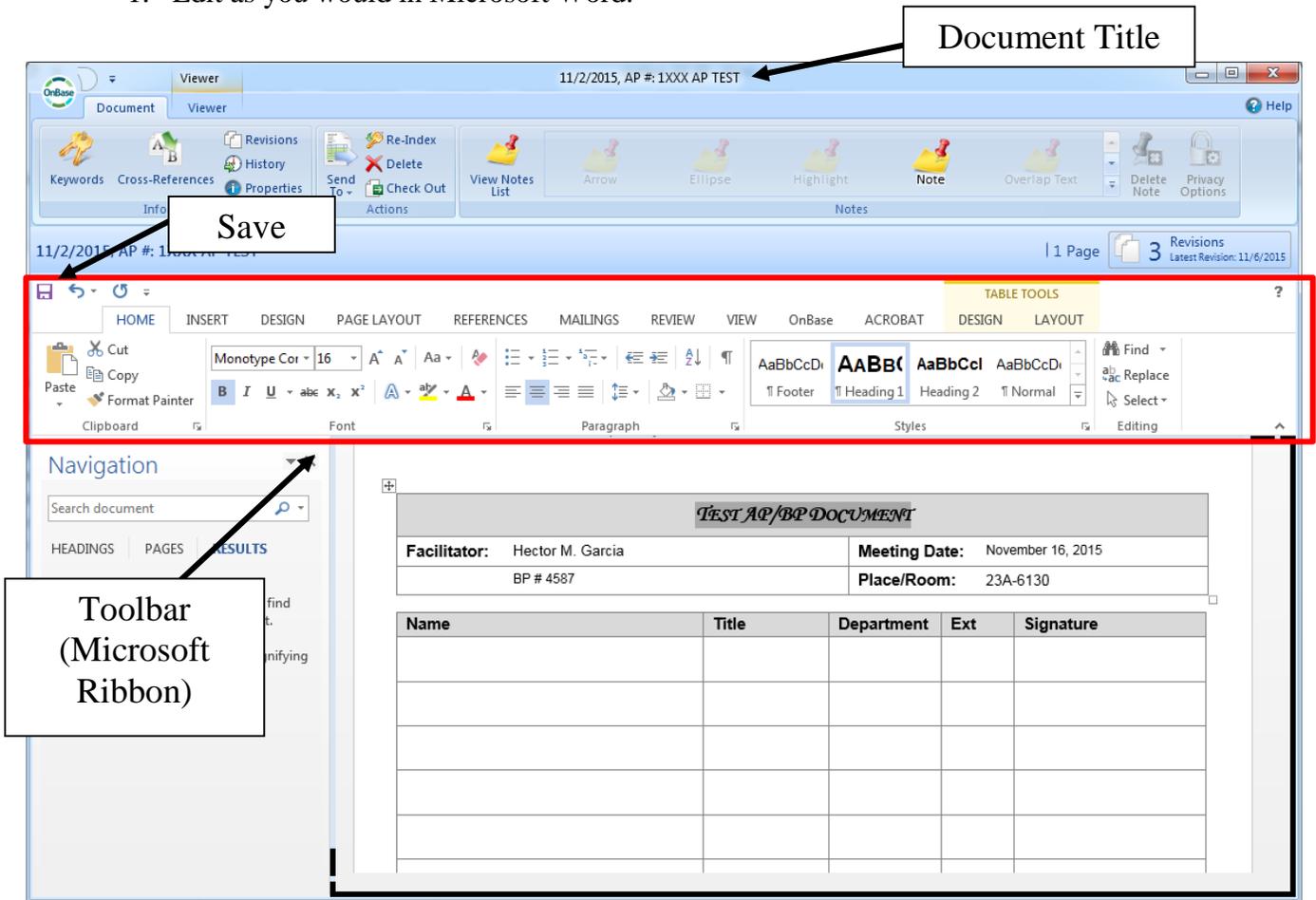
2. To save changes in the AP/BP document click on the save icon or use keyboard shortcut **(CTRL+S)**. *Note: DO NOT save under the OnBase tab located in the MS toolbar.*

3. You will be required to enter a comment. Please add brief description of the changes made to the document Click **OK**. You will then see a confirmation message.
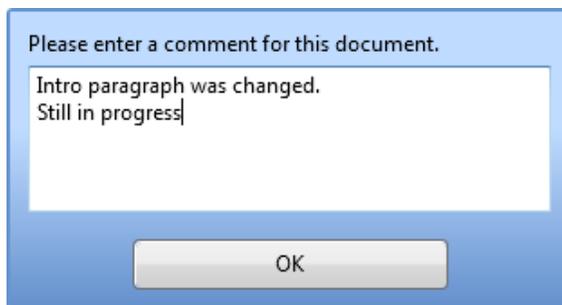
Submit for Review

Follow the four steps **ONLY** if you want to submit an AP/BP document for review.

1. Use the custom query tool to locate the AP/BP document that you want to submit.

2. **Right Click** on the document to view actions and select **Workflow** –> **Execute Workflow**.
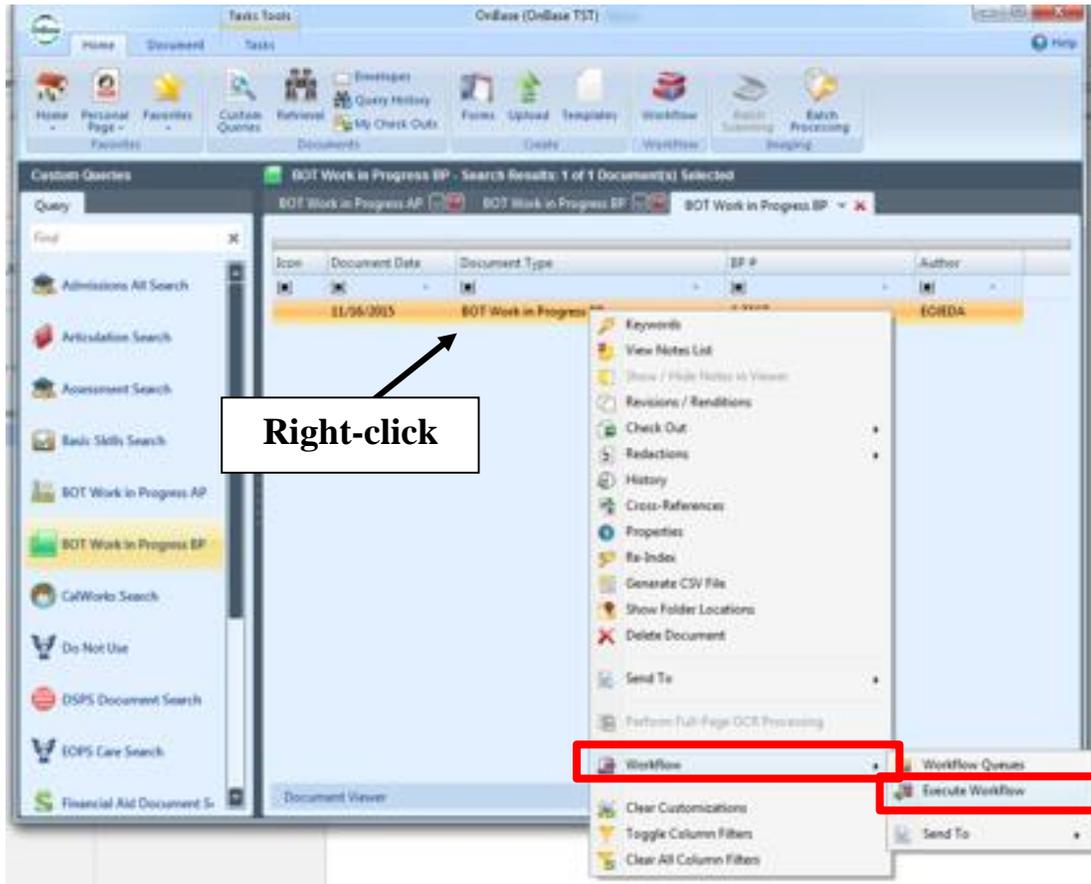
3. You will get this confirmation message. Click **OK**.
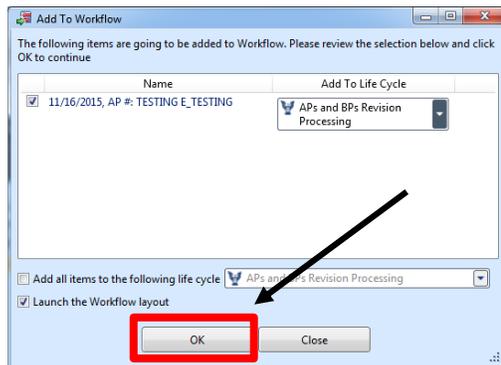
A new window will now display. This is the Workflow for the APs and BPs.

ONE MORE STEP…

4. Choose one of the two options in the ribbon:

   Submit for Review: Submits AP/BP for review.
   OR
   Send Back to Work in Progress: AP/BP will be taken out of the initial queue and sent back to corresponding Work in Progress folder.
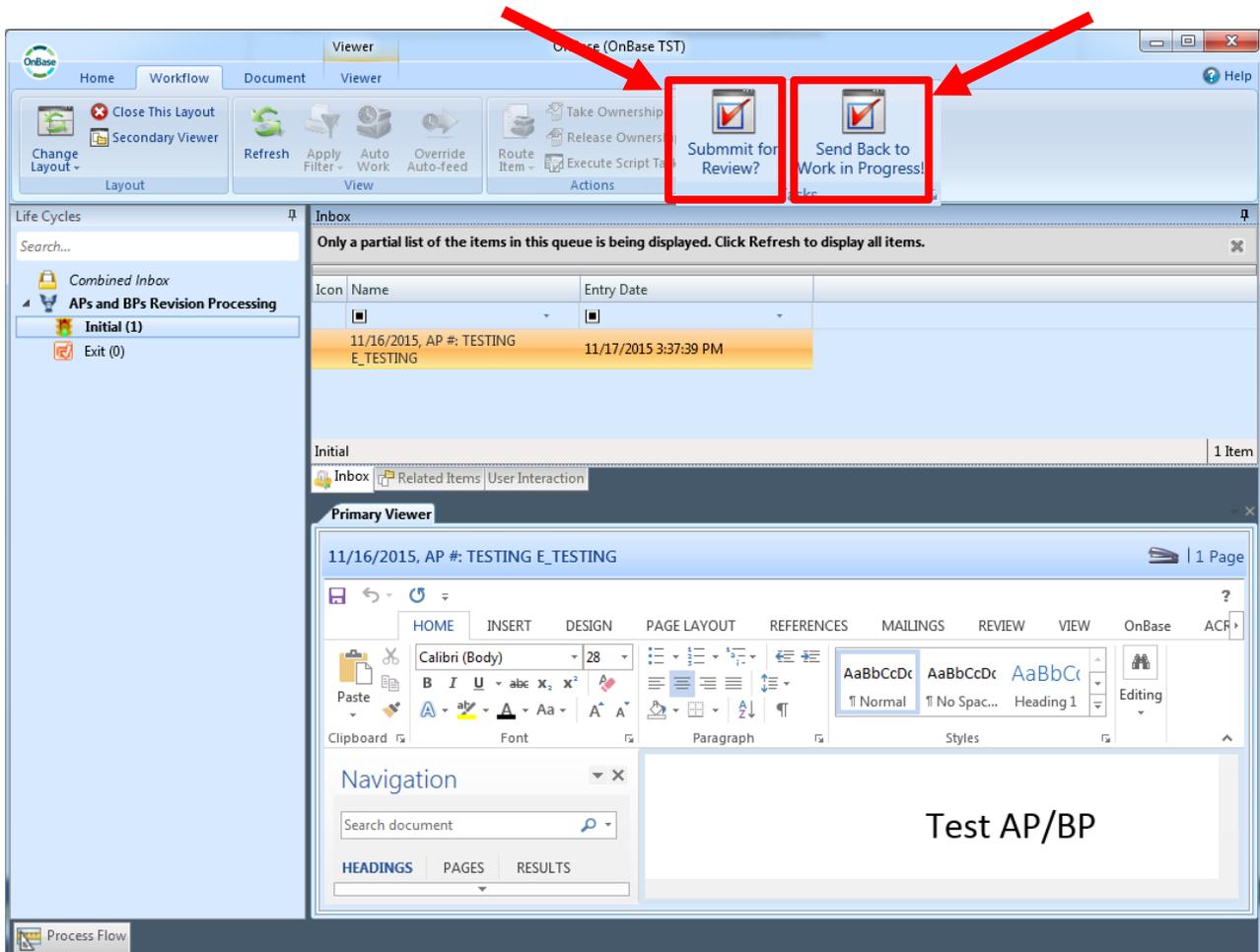
When an AP/BP is submitted for approval it can be approved or denied.

   IF Approved: Denise or Carol will move AP/BP to appropriate folder.

   IF Denied: Document will be sent back to the AP/BP Work in Progress folder with a note attached. No user notification will be sent.

Exiting OnBase

OnBase will run in the background after you login. Below is how to exit OnBase completely.

1. **Right click** on the Unity Client icon on the task bar and click **Exit OnBase**. (Lower right-hand corner of screen).
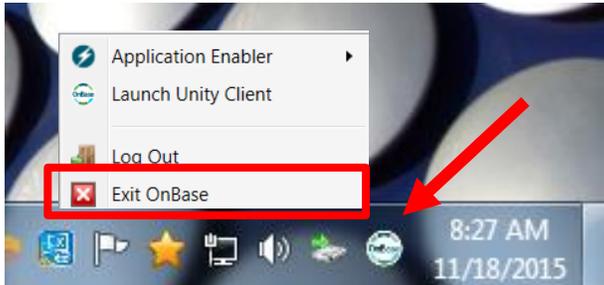
2. Click **Yes** to confirm exit.