

INFORMATION TECHNOLOGY Enterprise Application Systems

HylandOnBase AP/BPSubmissionfor 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: <u>https://obpw01.msac.mtsac.edu/appnet</u>

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.

OnBase [*] 14	2	<
Copyright © 1992 - 2015 Hyland Software, Inc. All Rights Reserved. Build Version 14.0.1.97	Image: DnBase PRD Image: DnBase PRD <t< th=""><th></th></t<>	
	Login Cancel	

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

HYLAND ONBASE OnBase Home Page

The Home Page is the default page after you log in. This page can be customized see instructions below.



HYLAND ONBASE 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.



 Click on the BOT (Board of Trustees) Work in Progress <u>AP</u> query for Administrative Procedures

Or BOT Work in Progress BP for Board Policies.



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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.

	OnBase (OnBase PRD)	
Home		🚱 Help
Home Personal Favorites	Image: Create wall Image: Create	Batch Processing aging
Custom Queries	BOT Work in Progress AP	
Query Find X	This Query will search for all Board of Trustees Work in Progress Administration documents and it would retrieve on AP #.	ve Procedures
Admissions All Search		
Articulation Search	AP #	
BOT Administrative Procedure:	AP Name	
BOT Board Policies		
BOT Work in Progress AP	AP Name	
BOT Work in Progress BP	field is defaulted to	
Singularity Search	caps.	
	Clear	Search

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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.

	OnBase (OnBase PRD)					
Home Document				🕜 Help		
Home Personal Favorites Page Favorites	Retrieval Documents	Forms Upload Templates Create	Batch Batch Scanning Processing I Imaging			
Custom Queries	📔 BOT Work in Progress AF	P - Search Results: 2 Document(s)				
Query	BOT Work in Progress AP 🖂	😹 🛛 BOT Work in Progress AP 👻 🗙				
Find 🗙						
🞺 Articulation Search	Icon Document Date	Document Type	AP #	AP Name 🔺 ,		
BOT Administrative Procec	11/2/2015 11/4/2015	BOT Work in Progress APs BOT Work in Progress APs	1XXX 2XXX	AP TEST AP TESTING		
BOT Board Policies						
BOT Work in Progress AP						
BOT Work in Progress BP	Document Viewer			¥		

Document window:

OnBase Viewer		11/2/2015,	AP #: 1XXX AP TE	ST					x	
Document Viewer									🕜 Help	
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11/2/2015, AP #: 1XX Click	to						1 Page	3 Revisions Latest Revision	: 11/6/2015	
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HEADINGS PAGES RESULTS			Tes	T AP/BP	DOCUMENT					
	Facilita	tor: Hector M. Ga	arcia		Meeting D	ate: No	vember 16, 201	5		
Create an interactive outline of your document.		BP # 4587			Place/Roo	m: 23/	A-6130			
It's a great way to keep track of where you are	Name			Title	Department	Ext	Signature	•		
or quickly move your content around.										
To get started, go to the Home tab and apply Heading styles to the headings in your document.										
									v	

5. To begin a new search close the current document viewing window and return to custom query; repeat steps 2-4.

HYLAND ONBASE 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.

					Docu	ment Title	
OnBase 🗸 Viewer			11/2/2015, AP #: 1XXX AP TEST				
Document Viewer							🕜 Help
Keywords Cross-References	Revisions Image: Second Condition History History Properties Second Condition Active Active	Re-Index Delete Check Out Ons	Arrow Ellipse	Highlight Not	e ov	verlap Text	Privacy Options
11/2/2015, AP #: 1900.70	ave					1 Page 🚺 3 🖥	evisions atest Revision: 11/6/2015
HOME INSERT	DESIGN PAGE LA	YOUT REFERENCES	MAILINGS REVIEW VIEW	OnBase ACROBAT	TABLE DESIGN	LAYOUT	?
Cut Paste ✓ Format Painter Clipboard	notype Cor \sim 16 \sim A [*] $I \sqcup \sim$ abc $\mathbf{x}_2 \times \mathbf{x}^2 \downarrow \ell$ Font	A [*] Aa •	· · · · · · · · · · · · · · · · · · ·	AaBbCcDi AABBC Aa TFooter THeading 1 He	BbCcl Aal	BbCcDt → Normal → Formation	
Navigation		4					
Search document			TEST A	P/BP DOCUMENT			
HEADINGS PAGES	ULTS	Facilitator: Hector	M. Garcia	Meeting D	ate: Nove	mber 16, 2015	
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Toolbar	Tina	•	Title	Dementaria	Evé	Ciamoturo	
roorour	t.	Name	nue	Department	EXL	Signature	
(Microsoft	t. Inifying	Name	inte	Department	EXI	Signature	
(Microsoft Ribbon)	t. Inifying	Name		Department	EXI	Signature	_
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- 2. To save changes in the AP/BP document click on the save icon are 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.



HYLAND ONBASE 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**.

Add To Workflow	
he following items are going to be added to Work K to continue	flow. Please review the selection below and click
Name	Add To Life Cycle
11/16/2015, AP #: TESTING E_TESTING	APs and BPs Revision Processing
🛾 Add all items to the following life cycle 👿 🗛	s and ar's Revision Processing
/ Launch the Workflow layout	

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.

HYLAND ONBASE 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.

