Hyland OnBase
AP/BP Submission for Approval

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## Table of Contents

- Accessing OnBase ................................................................. 2
- OnBase Home Page ............................................................... 3
- Retrieve AP/BP Document by Custom Query ......................... 4
- Edit AP/BP and Save .............................................................. 7
- Submit for Review ............................................................... 8
- Exiting OnBase ................................................................. 10
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.

![OnBase Unity Client icon](image)

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 login screen](image)

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.

Want to change this default page? It's easy!

1. Navigate to the page you’d like to set as your own Home Page.
2. Click the “Home” tab.
3. From the “Home” button dropdown, select “Make this layout my Home Page.”
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 AP** query for Administrative Procedures
   Or **BOT Work in Progress BP** 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.*

   ![](https://example.com/image.png)

   **Document window:**

   ![](https://example.com/image2.png)

   - **Click to View Notes**
   - **Click to View Revisions**

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

Please enter a comment for this document.

Intro paragraph was changed.
Still in progress

OK
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.

   ![Workflow screenshot]

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.
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.