Contents

- Overview
- e-Forms Administrator Access
- System Requirements
- Starting Unity
  - Via Unity
  - Via Citrix
- First Run: Make this Change
- Submit an e-Form

- Workflow View
  - Navigating Workflow
  - Special Queues
  - Queue Descriptions
  - Group the Inbox

- Custom Queries
- Retrieval
- Starting Preferences
- Unlock a Request
- Internal Messages
- Contact Information
e-Forms Overview

What are e-Forms?
- e-Forms replace paper forms and email requests
- Online submission of financial request forms
- Submitted directly to approver and/or finance center
- e-Forms are accessed by the Finance Center for processing

Who uses e-Forms?
- Faculty, Staff, and Students with a NetID can use e-Forms
- Records Management, Endowment Office, and others use the same base system (OnBase) for their forms and workflow

Roles
- Submitters
- Approvers
- Administrator
- Finance Centers

How do I access e-Forms?
- e-Forms are found on the Finance Center website: [http://www.dartmouth.edu/~fincenter/forms.html](http://www.dartmouth.edu/~fincenter/forms.html)
- Department Admins can also submit e-Forms using these links

Approvers can be submitters, administrators, or designated finance center staff
Administrator Access

- Administrator Access is special access to the OnBase system utilizing the Unity Client to search and review e-Forms
- Department Admins can see Orgs and Awards that they have access to in IRA
- Department Admins who do not have IRA access but need e-Forms should complete the Security Access Form and note access for OnBase only

What does my access mean?

- Unity access enables administrators to check the status of requests in the processing workflow
  - You can see all e-Forms for your ORG/Grant by form type (Purchase Request, P-Card, Journals, etc.)
  - You can review attachments included in an e-Form
  - You can submit your own e-Form
System Requirements

OnBase Unity Client

- PC – software installation
- Macs – use Parallels or Citrix to access OnBase
- Non DC networks (ie. DHMC) - use Citrix to access OnBase
- Computer Supported Browsers:
  - Internet Explorer 9 or 10
  - Google Chrome
  - Firefox 19-29

Need the OnBase client or Citrix installed?
Contact your local IT help desk
Starting OnBase via Unity

**FIRST**

- Log into VPN via f5 (Big IP Edge Client)

**THEN**

- Launch the OnBase Unity Client from Start Menu under Programs or via a shortcut on your desktop

*Tip: Save to your Start Menu or add to Taskbar*
Starting OnBase via Citrix

- Ensure that Citrix is closed – check your system tray in the lower left hand corner. If logged on, right click and choose exit
- Log into VPN
- Open Citrix from your taskbar
- Enter Dartmouth credentials if prompted
- Right click on Citrix in system tray, go to Applications, click on OnBase
First Run: Make This Change

Important

Unity Client users must make the following change the first time they open Unity:

- Select the **OnBase Icon** (upper left)
- Select **User Options**
- Select **Workflow**
- **Uncheck** “Automatically select first item in the inbox”

**How Important is this?**
If a Unity Client user does not uncheck this box, they will lock a request in the Queue causing a delay in processing. In fact, they likely will not be aware that they locked a request!
Submit an e-Form

Two Methods

- Finance Center e-Form links
  - Any faculty, staff, or student with a NetID can use the e-Forms links on the Finance Centers website: [http://www.dartmouth.edu/~fincenter/forms.html](http://www.dartmouth.edu/~fincenter/forms.html)

- Department Admins can submit within the Unity Client, but it is a little trickier if you have attachments....

Using Unity?

- Select the form type on your left and a blank form will appear for you to complete
- Complete the form

Need to enclose attachments?

- Select “Save without Submitting”
- Use your email notification link to include attachments
To view e-Forms for your IRA ORG or Grant select **Workflow**

**Workflow** has three main areas:
- **Lifecycles**
- **Inbox**
- **Primary Viewer**
Navigating Workflow

Lifecycles (Queues)
In the Lifecycles area, you have access to the Queues, where you can see different e-Forms by type (Purchase Request, P-Card, etc.)

► Select the arrow on the left side of the Form Type to expand and see the statuses
► Each Queue will show how many e-Forms are in each processing status
► There may be varying Queues depending upon the e-Form

Inbox
The Inbox area provides a list of e-Forms in process by the queue selected

Sort: select the small arrow on the right of the field

Tip: in the PCard queues, you can select the WF PCard Vendor View to see columns for “Vendor Name” and “Receipt Total”
Special Queues

Pending Submission
Additional Information
Pending Approval

- These queues will show e-Forms from other offices and areas of the College
- You will not be able to view the actual e-Form unless you have security access for the information included in the e-Form

**Best Practice:** Periodically check these queues for older items that may need your attention
Queue Descriptions

- **Pending Submission** – Requestor started a request but didn’t finish
- **Pending Approval** – Request has been sent to Approver and is waiting to be approved or denied. This is used for both approvals within departments and OSP.
- **Pcard Admin Completion** – Request has been submitted by someone in the department to the Departmental Admin who will complete the request
- **Pending OSP Review** – Requests have been sent to OSP and are waiting to be acted on
- **In Process** – Request has been assigned within the Finance Center
- **Hold** – Finance Center puts Request on hold while waiting for some event
- **Additional Information** – Request has been returned to the Submitter for them to correct or add information
Group the Inbox

Depending upon the number of e-Forms in the Queue, the Inbox can become lengthy to navigate

► Select the field you wish to group on
► Drag the column header into the area at the top of the form until “group by area” appears
► Let go at the “group by area” text

Tip: To view the forms in the group, select +
Custom Queries

Use **Custom Queries** to search for e-Forms in any status for your ORG/Grant.

- Each e-Form has a query pre-defined using the most common fields to that form.

- Dates can be selected from the drop down calendar or typed in MM/DD/YYYY.

- Use the wildcard character * to aid your search.

- Click Search (bottom right hand corner) to start the query.

Each line allows you to set the value to equal to =, or does not equal <> , by clicking on the icon.
Review Query Results

- Note the Document Type field in the list
  - **e-Form** will signify the form itself
  - **Attachments are listed by the document type** selected when the submitter attached documents to their e-Form

- You can filter results after the query has completed

Viewing

- Select the document (e-Form or attachment) to view
  - The information appears in Document Viewer, under the query result list

**Tip:** If you do not see the Document Viewer, click on the double arrow in bottom right hand corner
Use the **Retrieval** function to define and perform custom searches on specific document types.

- In the **Document Retrieval** area, select the Document Type.
- Enter Keywords to define your search.
- Double Click on the search result to view the document.

**Tip:** You can search on chart strings by expanding the section labeled “Item Number Ref.”
Starting Preferences

Change Your Start Page

- Custom Query
- Retrieval
- Workflow
  - Navigate to the page you prefer
  - Select Home in the upper left hand corner and then select ‘Make this layout my home page.’

Change Layout in Workflow

- Re-arrange the windows on your own and save as your default
- Select Classic or Simple Layout view and save as your default
Unlock a Request

Locked a Request?

It happens and it is usually unintentional.

- If a request is locked, a message will appear stating that the record is locked and will provide a NetID

If it is your NetID....

- Select the OnBase Icon (upper left)
- Select Administration
- Select Manage Locks
- A pop up window will appear
  - Select the request in the list to highlight the request
  - Select Remove Selected
- Ensure that you have followed the instructions for “First Run: Make this Change,” earlier in this document
Internal Messages

Links to e-forms can be sent directly to admins through the Internal Mailbox

- Click on the Home ribbon and then click on the Mailbox icon

- Click on the plus sign next to Today

- You will see a list of emails

- Double click on the email you would like to open and then double click on the Attachment. This will send you straight to the e-form where you can review the details and any attached documents.
At the end of your work session, log out of Citrix if you are using that and then the OnBase Unity client.

To close Unity completely, click on the icon on the task bar in the lower right hand corner of your screen; right click and then select “Exit OnBase.”
Questions or Issues regarding an e-Form?

Geisel Finance Center
5-1238 or Geisel.Finance.Center@dartmouth.edu

Questions or Issues related to your computer and the Unity Client?
Contact your local IT help desk or the main Geisel IT Help Desk