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Agreement/Contract Transmittal Form Process

College VP Business Services Role

Process Steps and

Using OnBase Unity Client

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Agreement/Contract Transmittal Form Process

The process for submitting an Agreement/Contract for approval is changing from the existing more manual process involving completing a fillable PDF and attaching documents to it to complete a “packet” and manually routing that packet for multiple approvals.

The new process utilizes a system called OnBase which is a platform on which the new electronic form exists, and the process “workflow” has been embedded. This will provide a more structured framework for the overall approval process; the capture of information and documents; the storage, retrieval, and management of those documents; and the visibility into the process.

This document introduces you to the activities and tools that will be part of your role in College VP Business Services. It will hopefully help you feel more comfortable with the initial use of the OnBase system.

Process Initiation

A link is made available that will open an electronic form that an initial Submitter will use to complete an Agreement/Contract Transmittal form. The form has instructions but is self-explanatory. There is a document entitled SUBMITTING AN AGREEMENT/CONTRACT TRANSMITTAL FORM that contains the link and additional information if needed.

When the submitter completes a form, they receive an email in reply that has a link back to the form and additional emails as the form moves from step-to-step in the approval process as an FYI.

Once the form is fully approved, the Submitter receives an email with the Contract PO and the fully signed Agreement attached (if applicable).

Approver Roles

I received an email telling me that I have a CTF to review and approve. What do I do?

College VP Business Services

From the email you received.

1. The email has an attachment/link. **Open** it. (See **ATTACHMENT/LINK** below for more.)
2. **Review** the instructions you see on the form in the "College VP Business Services" section.
3. Clicking on the **Details** tab will enable you to review the A/C information. If there are changes that need to be made, you can return the form to the initiator (See **Return and Hold** below for more).
4. **Review** the documents attached to the form. (See **Show Documents Folder** below for more.)
5. Once all responsibilities are met, click the **Checks Performed** checkbox and press the **SAVE FORM** button. Then use the **Approve/Forward** (details below) task to complete your approval.

Additionally, in this role, you may find it more convenient to use OnBase directly. You can always use the link in the email to go to the form, but you can also open Unity Client directly on your workstation and navigate to the form, to your workflow queue, to the folders that display the packets, etc. Each user role has a Unity Client Personal Page that contains direct links to areas of interest based on your role.

Detailed Information

Attachment/Link

The attachment/link is designed to open software on your computer called OnBase Unity Client. When starting in the Outlook desktop app, you should only have to double click the attachment to open OnBase. With **Outlook web app** you'll likely click the attachment which will download it, then just "Open File" from the downloads list.

If you've never installed OnBase Unity Client, you'll need to do that. Please see the instructions on how to do that.

Please note that users need to have their UserID associated with OnBase to use it. Therefore, if you have installed OnBase Unity Client and you try to open it and it tells you that you don't have a user account, please **notify IT**.

When you open the attachment/click the link an OnBase window will open.

In the main panel will be the form and along the top is the ribbon. This window is called the "**Document Viewer**" and the form is a "Document" in OnBase speak.

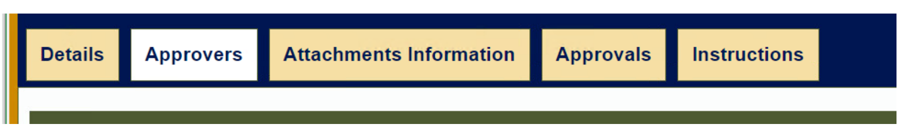
A "Document" can be any kind of electronic file such as an electronic form, an image file, a PDF, a Word document, and more.

Document Viewer

It is recommended that you maximize the window.

The Document Viewer shows you the form and it is up to you to verify and validate the information on the form per your role in the approval process.

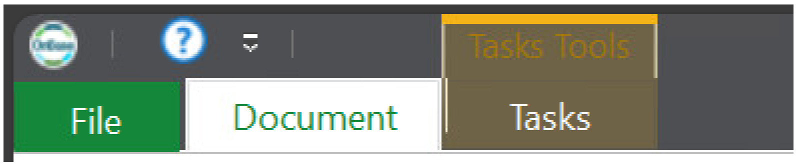
You can navigate the form by scrolling up and down and by using the **tabs** on the form. The tabs may change depending on your role but generally look like this.



In addition to the form, the Document Viewer has other options at the top of the window.

Ribbons

Let's look at the ribbons (Ribbons are the menus at the top of the screen, and you should have two—**Document** and **Tasks**. You'll also see a "File" menu. You won't need that.)

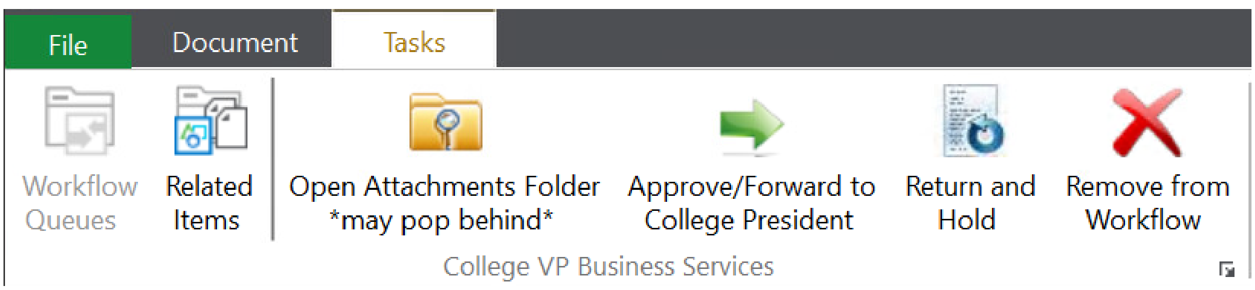


The default for OnBase is to go to the **Document Ribbon**. Sometimes when you're working with an item in OnBase and have switched to another ribbon, it'll switch back to Document if there's any kind of refresh. We'll cover the Document Ribbon below.

You will be using some User Tasks to complete the approval process, so let's look at the Tasks Ribbon first:

Tasks Ribbon

The Tasks ribbon contains important actions that you will use in your role. This is the CTF Process Tasks ribbon for the College VP Business Services step.



NOTE: There is an option in the Ribbon that says "Related Items" – this may create an error or display an empty panel. This is a recognized issue. Do not use this option.

The list of "Ad Hoc Tasks" that Users have access to *depends on the current status of the item* and your User Group or role. This is all related to the **Workflow**, or the automated movement of the item (in this case the A/C Transmittal Form). If you notice in light grey text at the bottom of the Tasks Ribbon it says, "College VP Business Services." That tells you that this is the step (or "queue") the item is in right now. And because you have access to this step, you also have access to the Ad Hoc Tasks. If you are looking at a document that is in a queue to which you do not have rights, you wouldn't see the list of Ad Hoc Tasks.

The list of Ad Hoc Tasks, therefore, is specific to the user, to the step/queue, and to the process overall. This gives us a lot of flexibility.

The information below discusses and dives into the tasks for this queue (or step)

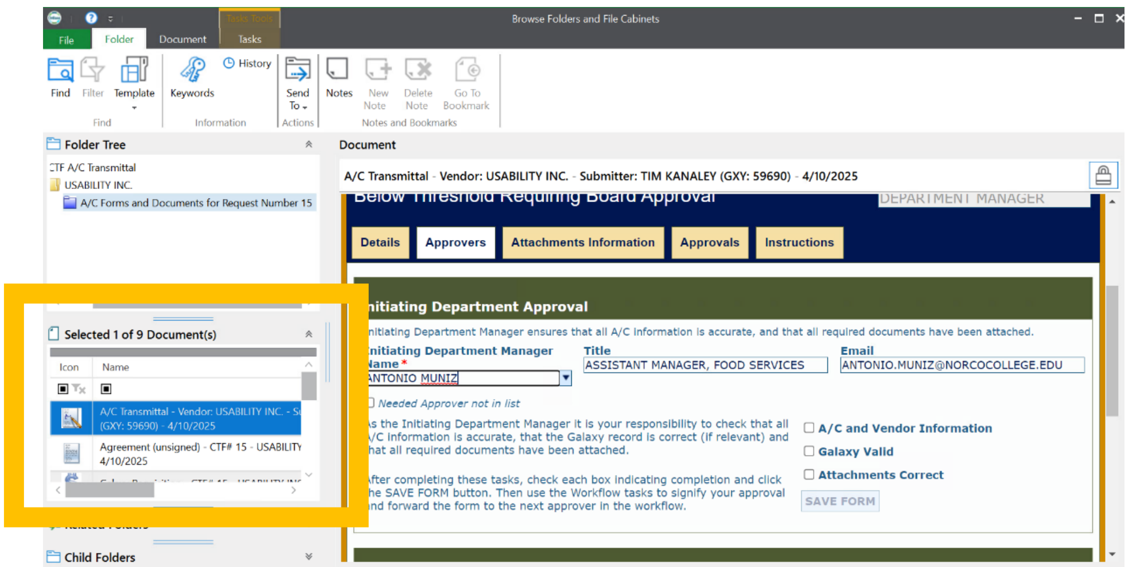
What are these Tasks, and when will you use them?

Open Attachments Folder Open Attachments Folder *may pop behind*	This opens a new window (see below) that shows a virtual folder. The folder contains this form as well as the attachments added to the form by the submitter (or others). If you need to add additional documents to the CTF "package" you can drag them to the Folder. (more information below). NOTE: When clicking this task, the window may "pop behind" – you'll need to use your task bar or ALT+TAB to bring it forward.
Approve/Forward to ... Approve/Forward to College President	Adds your name and the Date/Time to the Approvals list and prompts you to see if you want to forward the item to the next approver. If you want to wait to forward, simply answer NO. When this task is present, the name will include the queue/step to which the item will go next.
Return and Hold Return and Hold	Used when you **need** to return the form to the initiator. You will be prompted for a reason and text to place in the email. The form will be placed in the RETURN/HOLD queue and the initiator will receive your email.
Remove from Workflow Remove from Workflow	If there is an issue with this form and you're going to have your submitter create a new one, you can use this task to remove it from Workflow. It won't delete it from OnBase, it'll just put it in a different step where it can be deleted later.

Open Attachments Folder

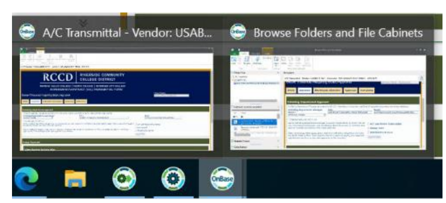
Open Attachments Folder
may pop behind

Clicking this task opens the **Folder** associated with the A/C Transmittal Form.



The documents in the folder are in the section of the screen highlighted above.

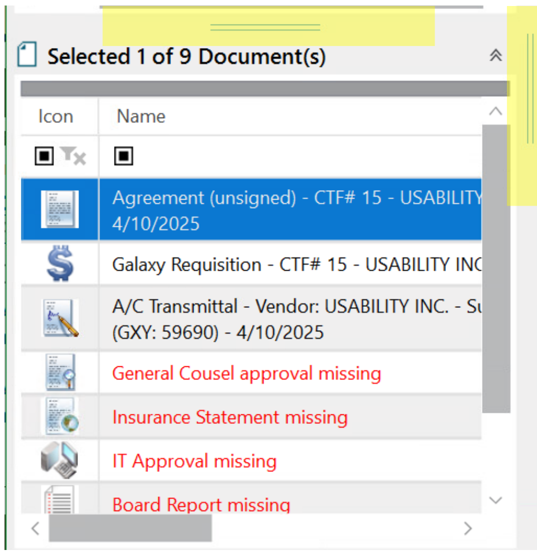
Once again it is highly recommended that you **maximize** this window for ease of viewing.



When the window opens it SHOULD display on top of your Document viewer, but if not, simply select the window from the OnBase item in the system tray.

The default TEMPLATE for this folder will show you what documents are there and what document might normally be there but are missing.

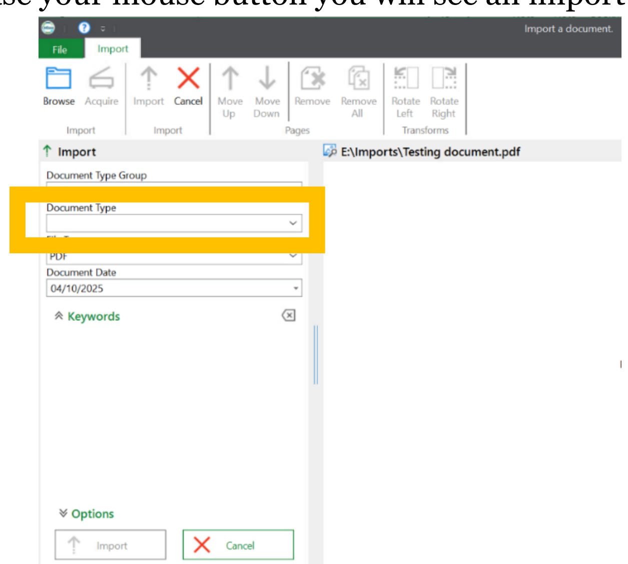
Not all documents are required for all forms so if some are missing that is not necessarily a problem. However, it is part of your role to make sure the required documents are there and correct. You can use the scroll bars and "handles" to adjust this viewer as needed so you can see everything you need.



HANDLES—click and drag these to adjust the size of the box.

To view a document, simply single click on the document name in the list and it will display to the right.

If you need to add a document, drag the document from where it is saved on your computer and drop it in the document list (you can drag from your desktop, your file explorer, an email, etc.). When you release your mouse button you will see an import window.



The window may not display the file you've dragged over – this happens if the imported file is a PDF and you do not have Adobe Reader installed on your PC. If the preview is not available, don't worry, it will still import correctly.

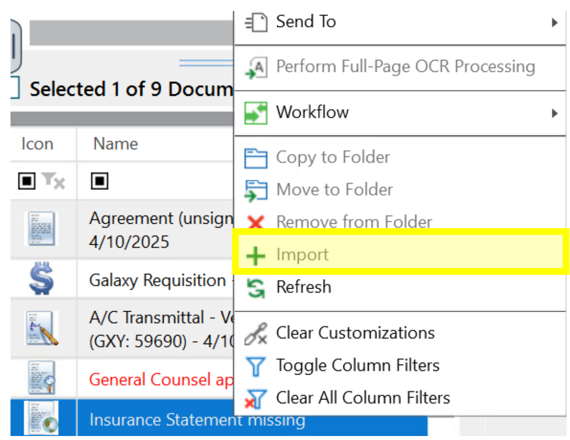
On this screen the only thing you need to do is select the type of document you're importing using the "Document Type" drop down menu (highlighted above).

The list that appears includes only the document types that could belong with this CTF

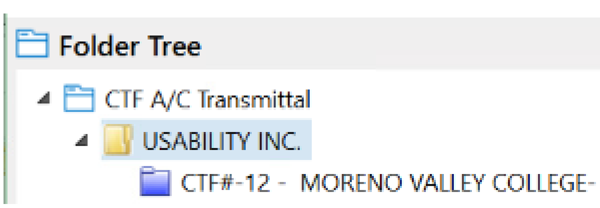
Choose the correct one and click Import. It's not necessary to review or alter the Keywords (and it's preferred that you do not)

Another way to import a document, if you cannot click/drag, is to ***activate*** the Import option in the documents list.

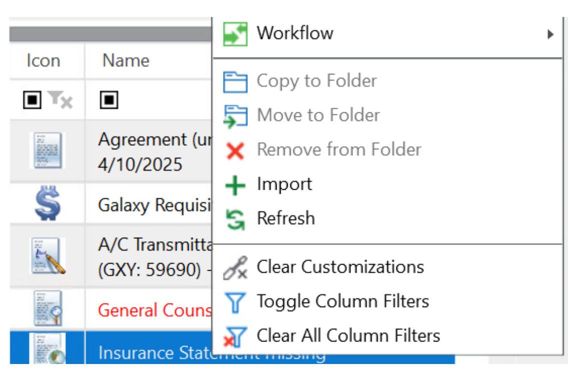
When you right-click on one of the document type names, you will see a long list of options, as you see on the right. It is likely that the +Import option is greyed out.



You can ***activate*** that option by clicking once on the **folder** in the Folder Tree with the Vendor Name (in this case, USABILITY INC) and then clicking on the form folder itself.

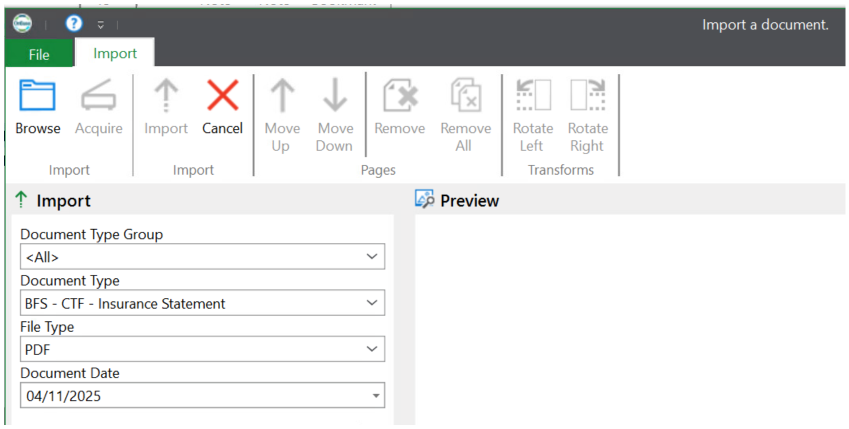


This will ***activate*** the Import option.



Like when you click and drag, this **Import** option will also open the Import a Document window, and now you can use the **Browse** option to browse to your document.

In this case the Document Type will pre-select based on the document you right clicked on in the Document List. If you need to, you can change that here.

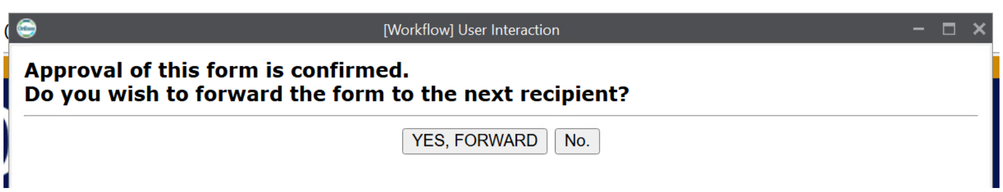


Approve/Forward to ...

Use this task to indicate your approval of the document, and, optionally, forward it to the next step.

Clicking the task will add your approval to the Approvals list (your name, this step, and the Date/Time) and then prompt you if you want to forward the item to the next step.

If the form has already been approved at this step, you will see a prompt letting you know and asking if you want to add another approval. Whether you click YES or NO, you will then receive the prompt about forwarding the item.



Clicking YES, FORWARD will forward the item and remove it from the current step. The items may or may not disappear when you click YES. This depends on your role and rights to the document.

If the form does NOT disappear, ***simply close the window***, you are done. You should not act on the document further if you have forwarded it.

Clicking NO will simply close the prompt and you can go back to the form. It is unlikely you'll need to do this. Please note that if you choose NO, you will need to return to the form and use the Approve/Forward Task again to forward it – this will add another Approval record to the list.

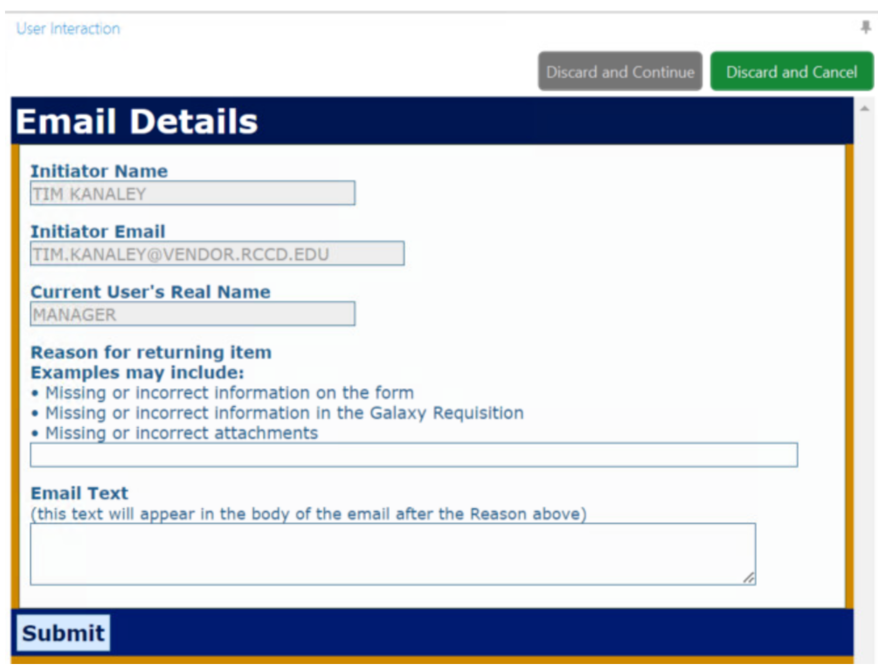
Return and Hold

Return and Hold

When you select the Return and Hold task you indicate that you need to return the form to the initiator.

You will first be prompted for a reason for the return and any text you'd like to place in the email via the popup that you see below. Be as specific as possible so that the initiator is clear on what you'd like them to do.

The email that they receive will come from your email address, so they might reply *directly to you*. They might even use email to answer your questions or send you documents. Since the Return action deletes all prior approvals, the submitter will need to use the options on the form to resend it, and the form will proceed through the full approval process – it will be labeled as "Resubmitted."



User Interaction

Discard and Continue | Discard and Cancel

Email Details

Initiator Name
TIM KANALEY

Initiator Email
TIM.KANALEY@VENDOR.RCCD.EDU

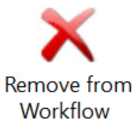
Current User's Real Name
MANAGER

Reason for returning item
Examples may include:
- Missing or incorrect information on the form
- Missing or incorrect information in the Galaxy Requisition
- Missing or incorrect attachments

Email Text
(this text will appear in the body of the email after the Reason above)

Submit

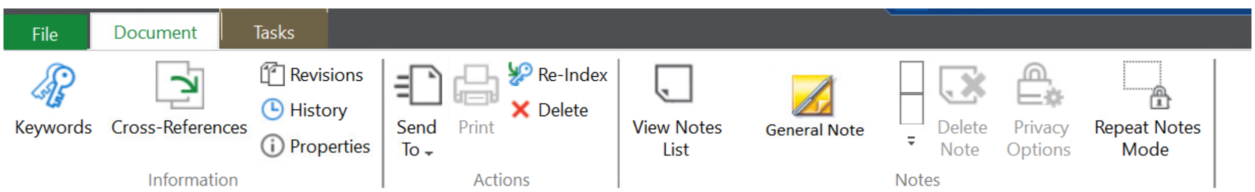
Remove from Workflow



This task will remove the form from Workflow and from further processing. At this time, it will NOT delete it from OnBase. If the form needs to be deleted from OnBase, an administrator can do that for you.

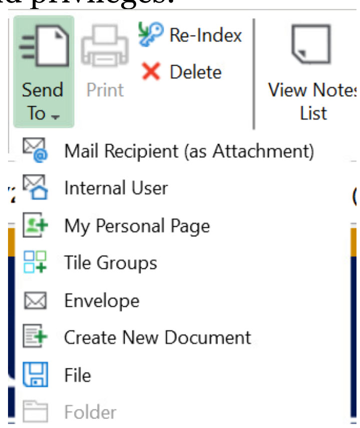
Document Ribbon

Your Document ribbon should look like what's below – although depending on some rights and privileges you might see more or fewer options.



For the most part, in your role as College VP Business Services, you will not use the functions of the Document ribbon for the CTF Process. However, you may use some of these options in other uses of OnBase in the future. The options are described below.

Keywords	Displays the Add/Modify Keywords pane to the right of the document. Keywords are values assigned to documents that are specific to the document (e.g., Vendor Name, Amount, Initiator Name, and many more). The Keyword can be used to alter keywords with the correct privileges.
Cross-References	Display the Cross-References pane to the right of the document. Cross-References are additional documents that are related to the displayed document in some way (e.g. supporting documents for the CTF).
Revisions	Opens the Revisions and Renditions dialog box. A Revision is a later edition of a document if the document is changed—this generally applies to an electronic document like a MS Word document. If there are Versions of documents being tracked these will also shop in the dialog box – a version is a "replacement" of a document being stored in its

<table>
<tr><td></td><td>place (this might be used for a new version of an agreement PDF for example).</td></tr>
<tr><td>History</td><td>The document history includes Logged information about what has happened to the document since it was created in OnBase. It includes Date/Time, User, Action performed, and a description of the action.</td></tr>
<tr><td>Properties</td><td>Properties includes information about the document that is generally only useful in troubleshooting situations.</td></tr>
<tr><td>Send To</td><td>Send To displays the following options depending on your rights and privileges:


• Mail Recipient (As Attachment) sends the document or a link to the document to a user via external mail. (Despite this displaying, you may not have rights to utilize this option.)
• Internal User sends the document to a user via internal mail. (This is not a recommended way to communicate internally with your co-workers and should not be used.) (Despite this displaying, you may not have rights to utilize this option.)
• My Personal Page sends the document to a tile on your Personal Page. (There is more information on Personal Pages later in the training materials.)
• Tile Groups adds the document to the selected Tile Group. (Similar to Personal Page and also covered later in the material.)
• Envelope displays the Envelope pane in the task pane.
(An Envelope is a way to organize documents that might be otherwise unrelated. You will not need this function as part of the CTF Process.)
• Create New Document is a way to make a copy of this existing document within OnBase, but with</td></tr>
</table>

	different Keyword data. It is rarely used and you will not need this function as part of the CTF Process. • **File** gives you a dialogue box that enables you to save a copy of the document to your desktop or a network location. This might be needed to "download" a copy of the Agreement to send to Adobe Sign for example.
Print	Provides a Print dialogue to the right of the document so that you can print the document to a network printer.
Re-Index	This option displays the Keyword panel but also allows the user to alter the Document Type and other core information about the Document. You will likely not have access to this function.
Delete	This allows the user to Delete the document from OnBase. You will likely not have access to this function. There is an Workflow option to accomplish this if necessary.
View Notes List	This option displays the list of any notes applied to this document.
[Notes]	The types of notes you have access to are displayed here. If you have sufficient privileges, you can view notes and create notes and annotations on documents using the Notes gallery. Any note type you have access to will be listed. A Note is like placing a "Post-It" on a document. It doesn't alter the document but can be a useful way to capture additional information that might benefit you in the future or benefit another user. "Notes" sometimes also include annotations like stamps, highlighters, and redactions. These are not in use at this time.
Other Notes options	Notes can be deleted, have temporary privacy applied to them and be repeated on additional documents. These options will not be available at this time.

The options in the Document Ribbon will be covered in a demonstration video to which you should have access.