

## OnBase: Approver Resources

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## Introduction

This guide will show how to fill out forms for approval, how to navigate through the approval interface, and how to delegate approvals.

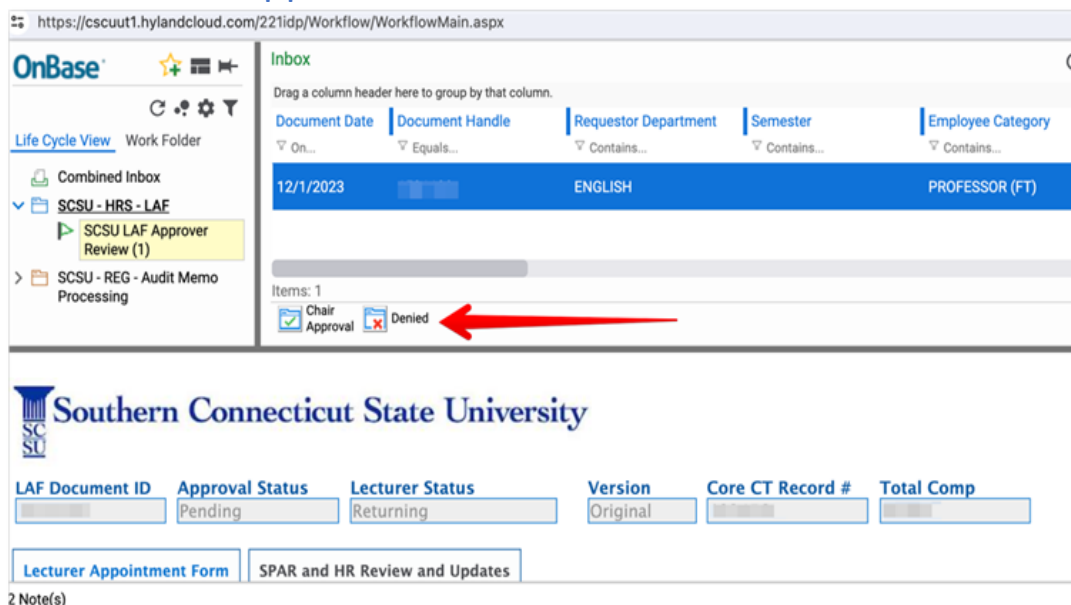
## How OnBase approvals work

1. Submitter fills out a form.
2. Approvers in the workflow are notified by email that action is needed.
  - a. Open when finished.
3. Reminders are sent out according to the settings in that workflow.
4. After approval the next approver is notified.

## How to use the approval interface

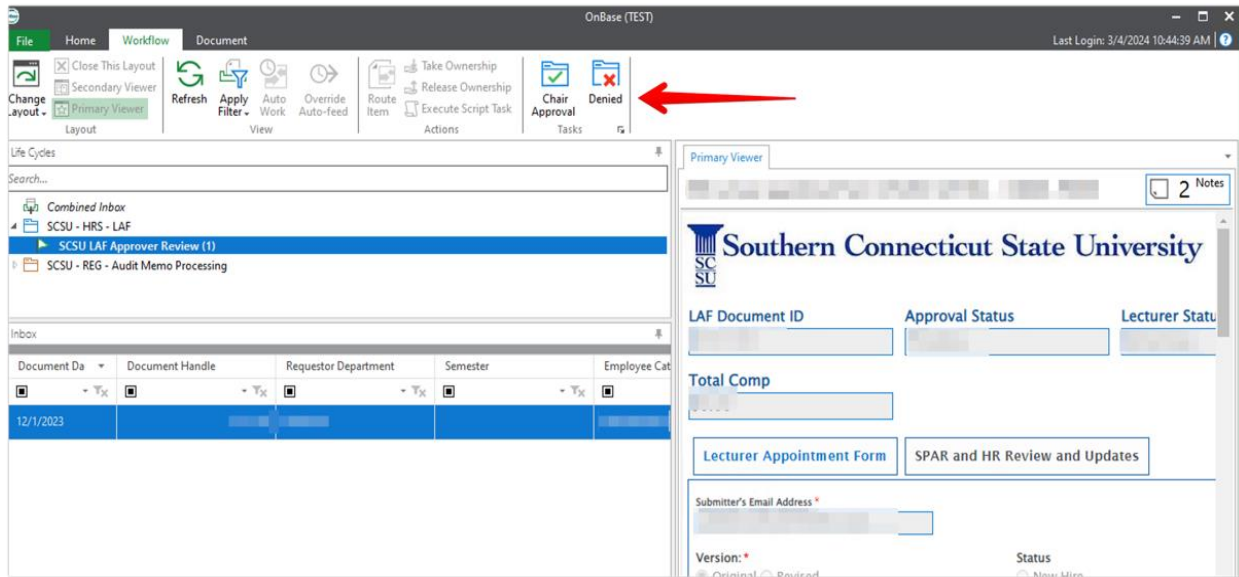
5. How to approve and deny

### Web Client – Workflow Approver Button location



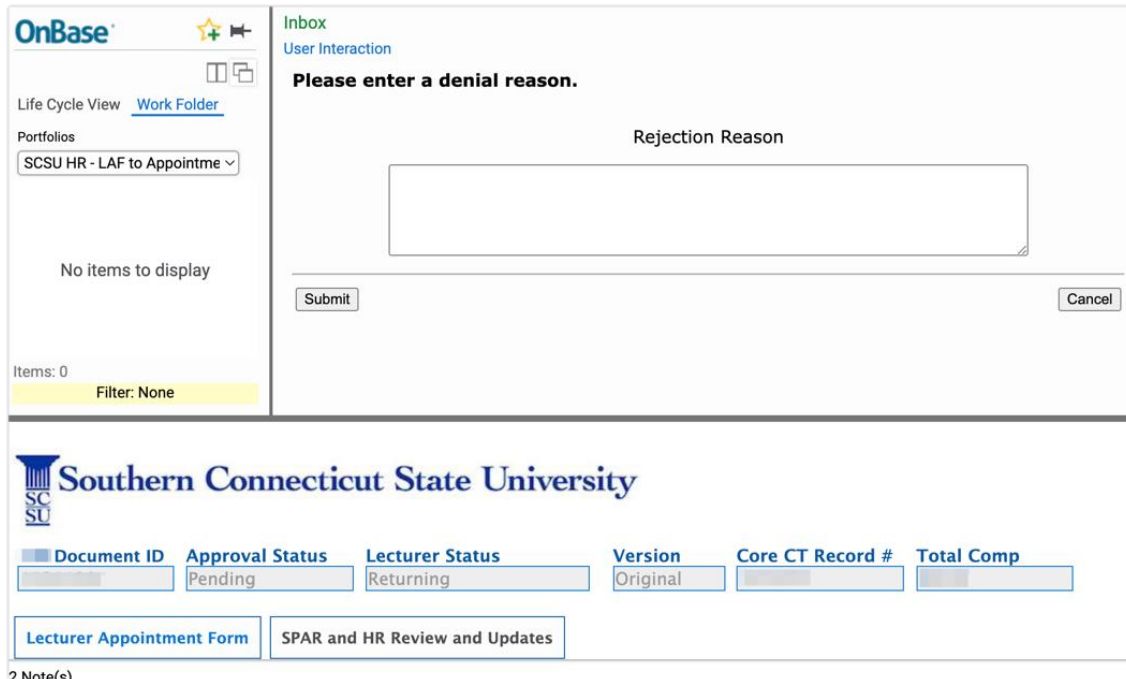
The screenshot shows the OnBase web client interface. The top navigation bar includes the OnBase logo and a search icon. The main content area is titled 'Inbox' and displays a table of items. The table has columns for Document Date, Document Handle, Requestor Department, Semester, and Employee Category. A single item is listed with a date of 12/1/2023, handle ENGLISH, and employee category PROFESSOR (FT). Below the table, there is a section labeled 'Items: 1' with two buttons: 'Chair Approval' and 'Denied'. A red arrow points to the 'Denied' button. The bottom of the page features the Southern Connecticut State University logo and a footer with various document links and a note count.

## Unity Client – Workflow Approver Button location



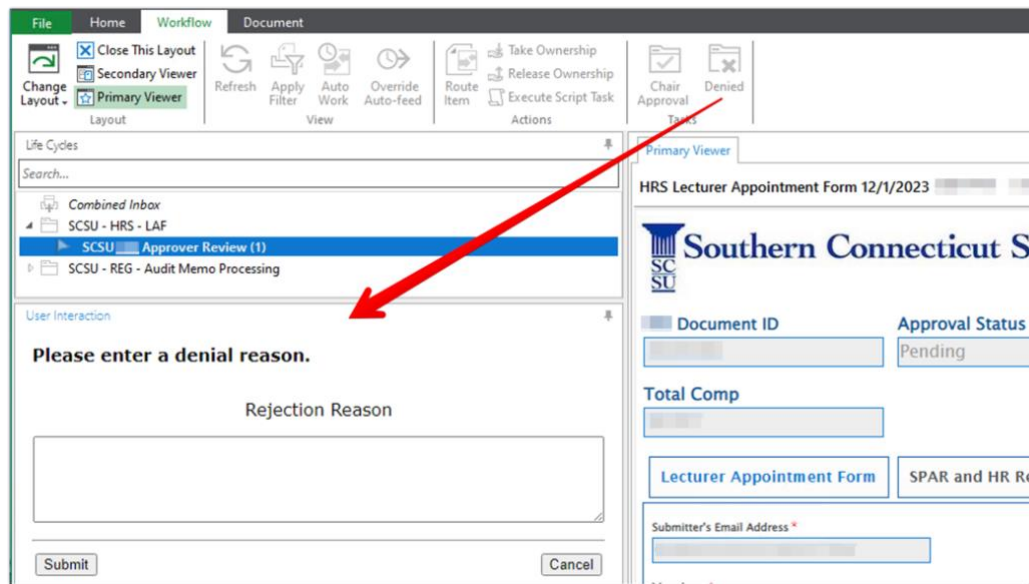
- Be sure to enter a reason for denial

## Web Client – Workflow Approver – Rejection Reason text box location



- b. The submitter gets an email with the denial reason

## Unity Client – Workflow Approver – Rejection Reason text box location



- 6. How to access your approval queue
- 7. How to filter messages in Outlook so they don't appear in your inbox

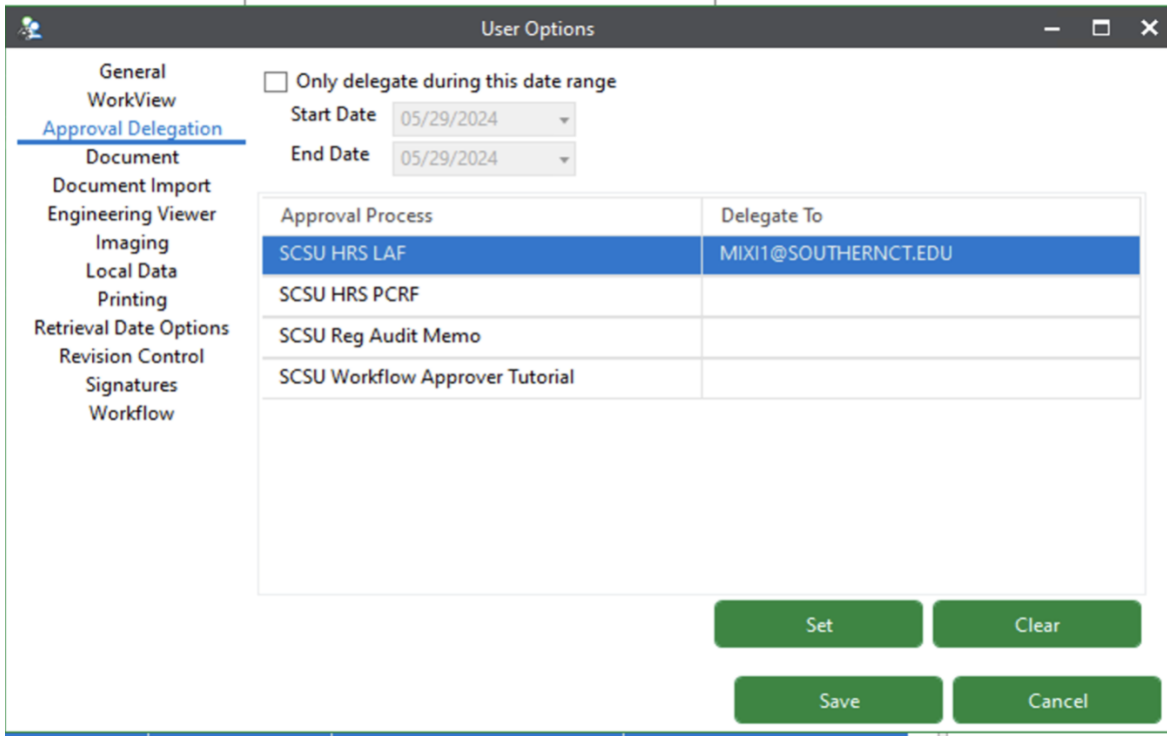
## How to delegate approvals

- 8. Delegating approval in OnBase to another person
  - a. Option 1: Utility Client
  - b. Option 2: Manual Review

Option 1: Unity Client has a Delegation option for Workflow Approver Management. Delegation allows you to assign an alternate approver to your items that require your approval.

Unity Client Steps to use Delegation:

- ( 1 ) Select Menu item - File | User Options
- ( 2 ) In the User Option pop-up window – Select “Approval Delegation” (listed on left side)
- ( 3 ) For the Approval process, “SCSU HRS LAF”, use the “Set” button on bottom to pick the approver that your delegating to be approve for the items your assigned to approve.
- ( 4 ) Review your settings to make sure they are correct – Press “Save” to initiate the delegation.



Option 2: Manual Review each LAF that is ready for Provost Review / Approval – check the Assigned approvers via the menu option “Workflow | Approval Status “

Current Status Tab shows who is the pending Approver.

If only your name is listed and Inita is not also listed, document the LAF Document ID.

Make list of all LAF’s that require a manual change.

Send this list to me and I can assist in assigning Inita as an approver.

