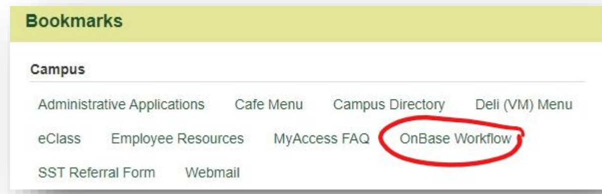
Add/Drop OnBase Workflow Tutorial

Accessing OnBase

Log into OnBase – Workflow

Visit the main MyAccess page at https://myaccess.southern.edu/

Under the heading "Bookmarks" click "OnBase - Workflow"

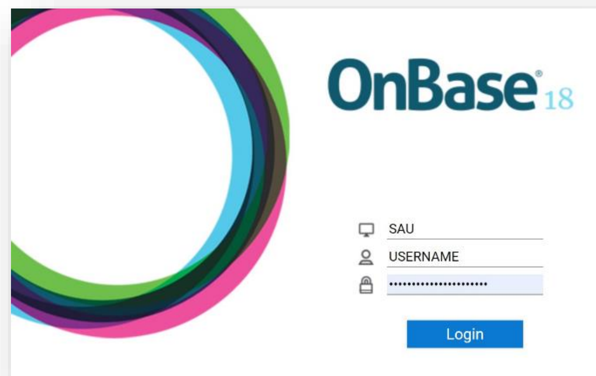


The OnBase login will appear

Use your Southern login credentials

NOTE: Username appears in all caps by default and is not a reflection of caps lock being turned on.

Your password is case sensitive.



OR

Access Form Via Email Link

You will receive an email notification whenever a student submits a form that needs your review. This notification will always contain a direct link to the form the student submitted.

Click on the form link in your email

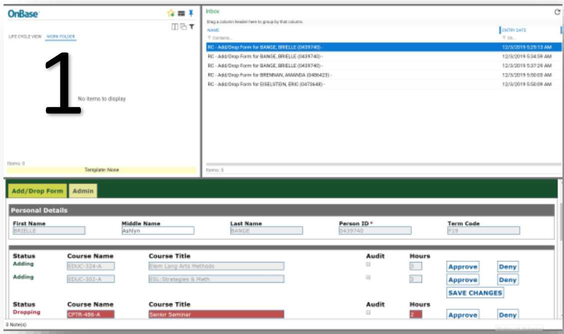
Log into OnBase using your Southern login credentials

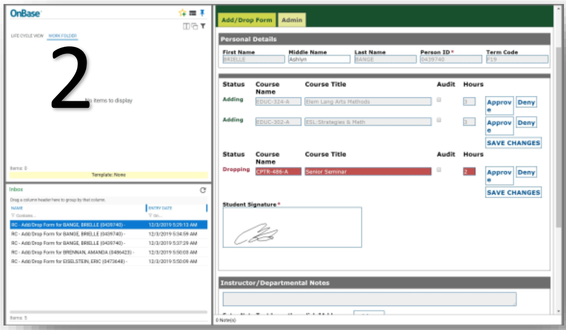
NOTE: Username appears in all caps by default and is not a reflection of caps lock being turned on. Your password is case sensitive.

The form will automatically load for review.

Navigating Workflow

There are two possible layouts for your workspace, the 1st layout is configured by default. We suggest using the 2nd layout for a more user friendly experience.

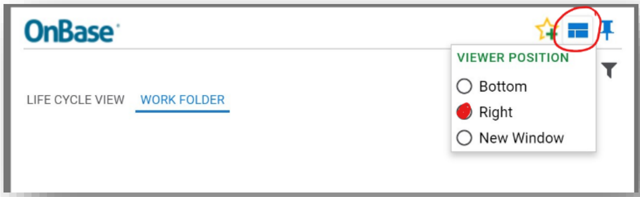




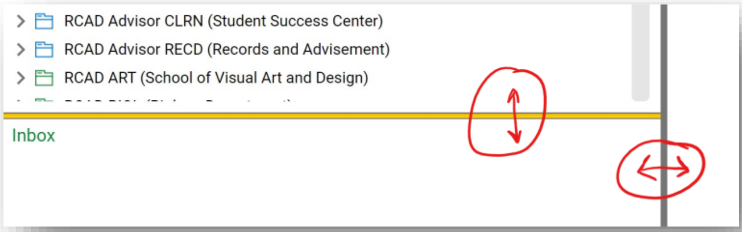
To change your layout click the icon circled in the adjacent image

Select “Right” from the “Viewer Position” menu

This will save as your default view until you clear your browser cache at which point you will have to reset your layout preference



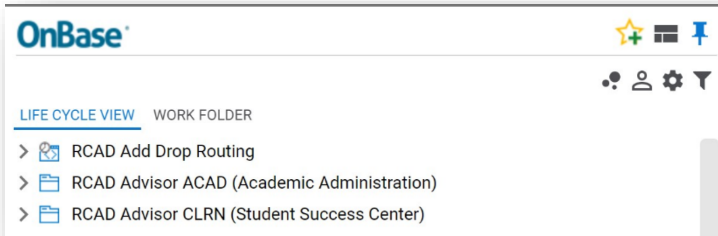
You may also resize the 3 windows to positions that best suit your desired workspace



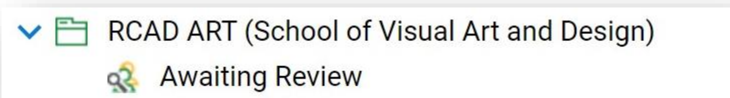
Retrieving Forms

In the lifecycle window, find the one that belongs to your department.

Click the arrow on the left to expand the lifecycle.



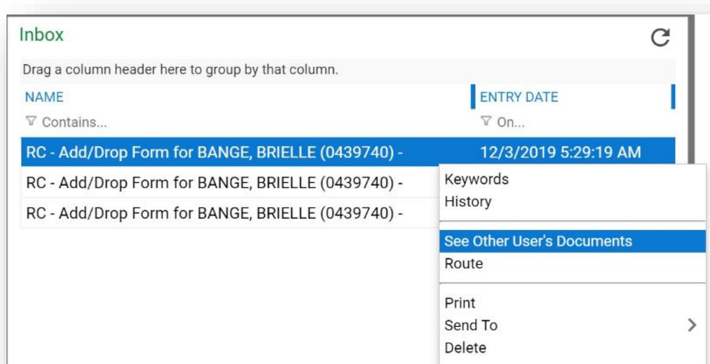
Once expanded select "Awaiting Review" to view items assigned to you.



Now your "Inbox" window will display forms assigned to you for the selected department

To view all documents in your department, right click within the "Inbox" window

From the drop down menu select "See Other User's Documents"

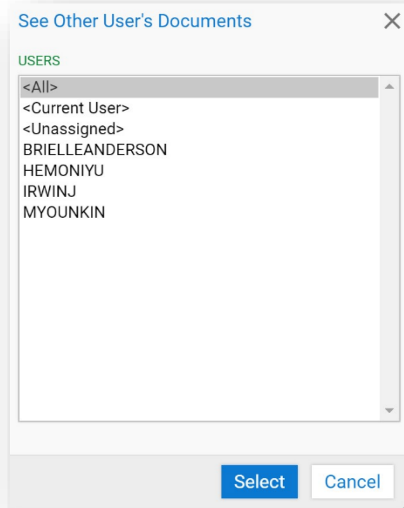


From the pop-up window that appears you may:

- View another instructor's queue
- View forms that are not assigned to any instructors
- View all forms that belong to your department

Highlight your desired viewing option then click "Select"

Your "Inbox" window will now display your desired items

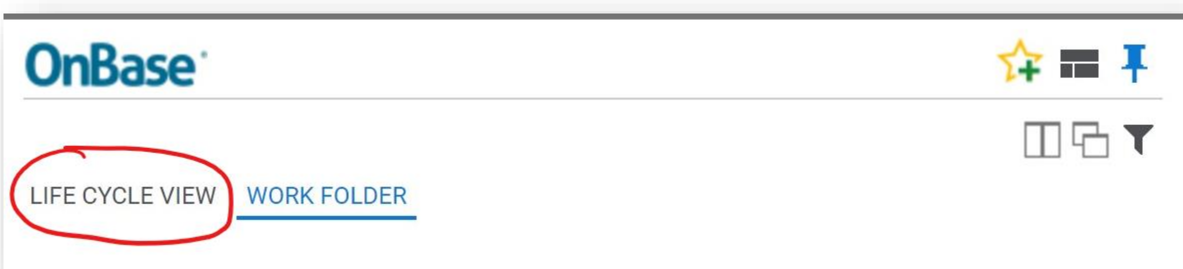


By default, once you select a queue for a specific lifecycle your "Life Cycle" window becomes a "Work Folder" window. This should always be empty and has no relation to the Add/Drop process.

You may need to switch lifecycles if:

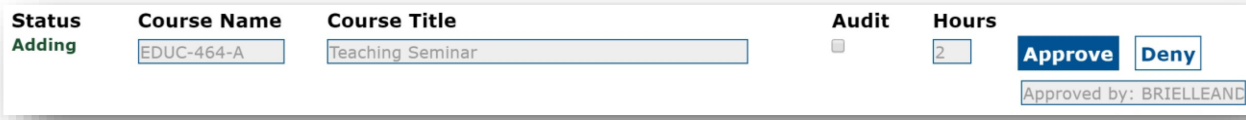
- You have access to other departments and wish to switch lifecycles
- You entered Workflow via an email link

To switch lifecycles click "Life Cycle View" and repeat the initial steps outlined earlier in this section

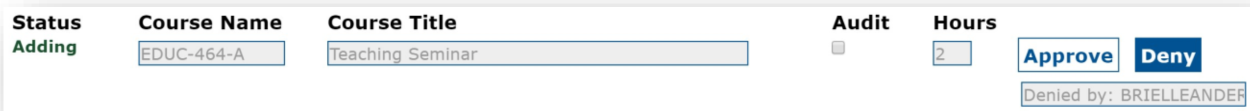


Reviewing the Form

To approve a requested change, click the "Approve" button to the right of the course



To deny a requested change, click the "Deny" button to the right of the course



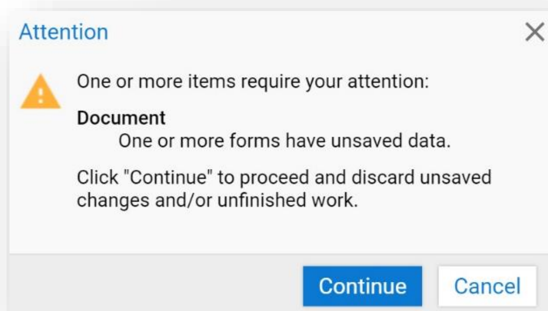
When you interact with the review buttons your username and review decision are recorded alongside the course.

Saving changes

Before exiting the form you **MUST** save changes or all of your review decisions will be lost

Buttons for saving changes appear in the course area, instructor notes area, and advisor area

If you attempt to leave a form without saving changes the following prompt will show. Click cancel to go back and save changes



Even after saving you may change your approval decision as long as the form remains in your queue. However, the form will exit your queue after all decisions pertaining to your department are complete.

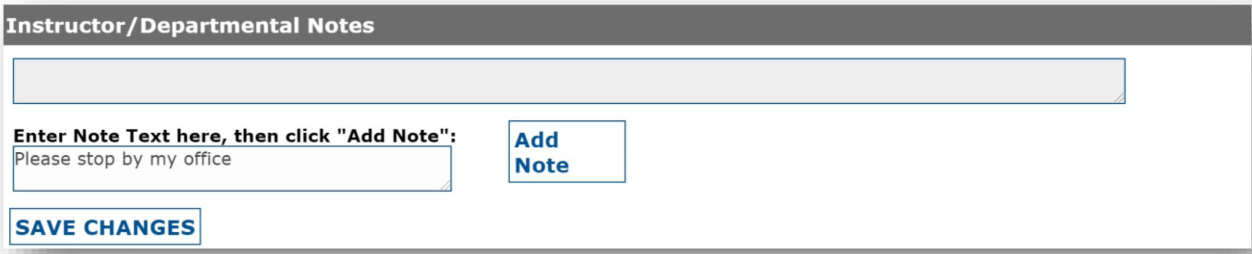
System completion checks run every 10 minutes.

Note: Please continue to follow your department's policy for approving on behalf of other instructors and advisors.

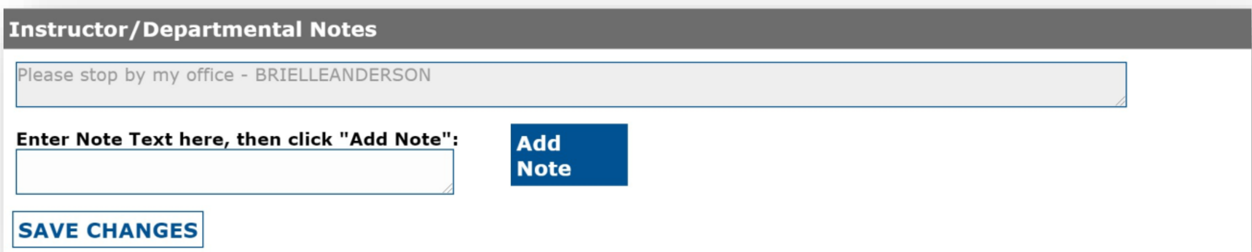
Adding Instructor Notes

Permanent instructor notes may be added to the form (please keep in mind these can be viewed by the student later).

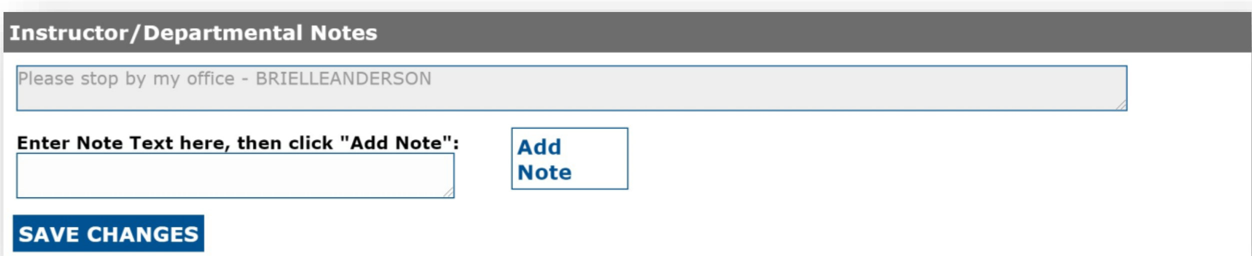
To add a note, enter text in the text box as shown below.



When your note is ready, click “Add Note.” You will not be able to make changes after adding the note. If you add a note in error exit the form without saving.



Finally click “SAVE CHANGES.”

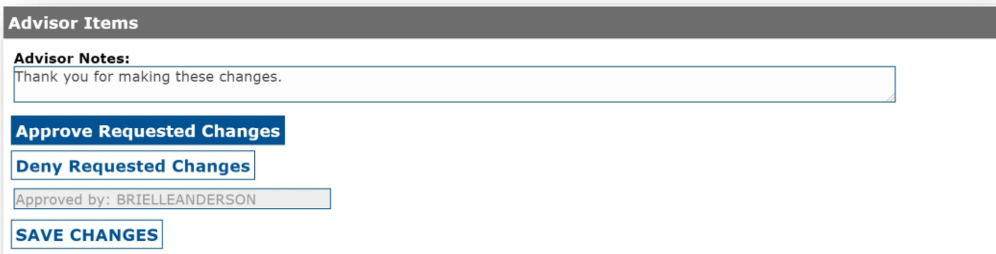


You may add as many notes as you would like.

Advisor Review

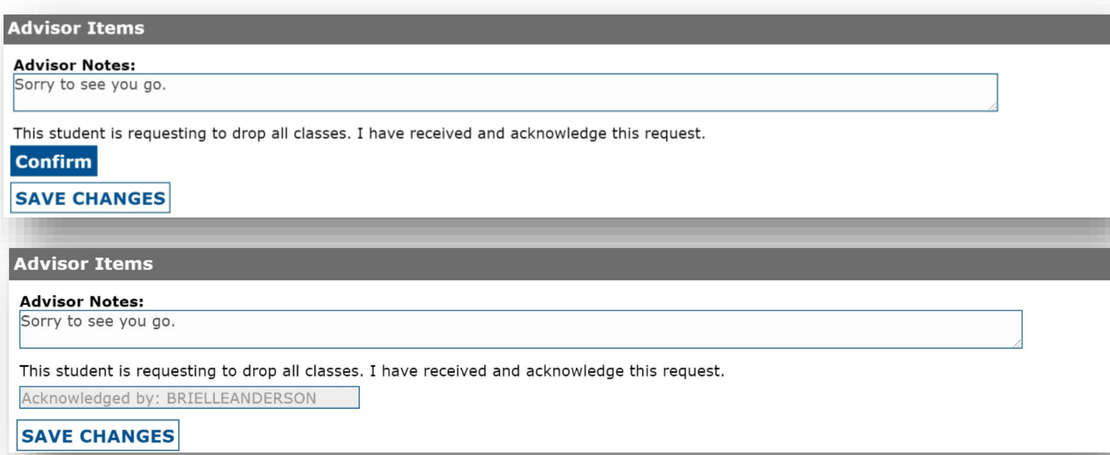
You may add any notes in the advisor notes section while reviewing. These notes may be edited as long as the form is in your queue.

To approve a request, click “Approve Requested Changes”



To deny a request, click “Deny Requested Changes”

In the case of a drop all request, please click “Confirm” to certify you have reviewed the form



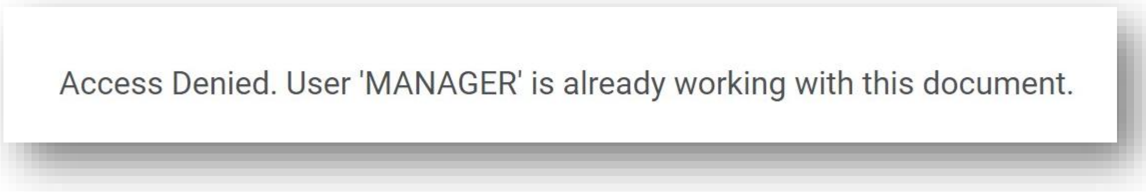
Please remember to click “Save Changes” or all of your reviewing will be lost

Logging out/Locking issues

Please always remember to close out of workflow when you are done

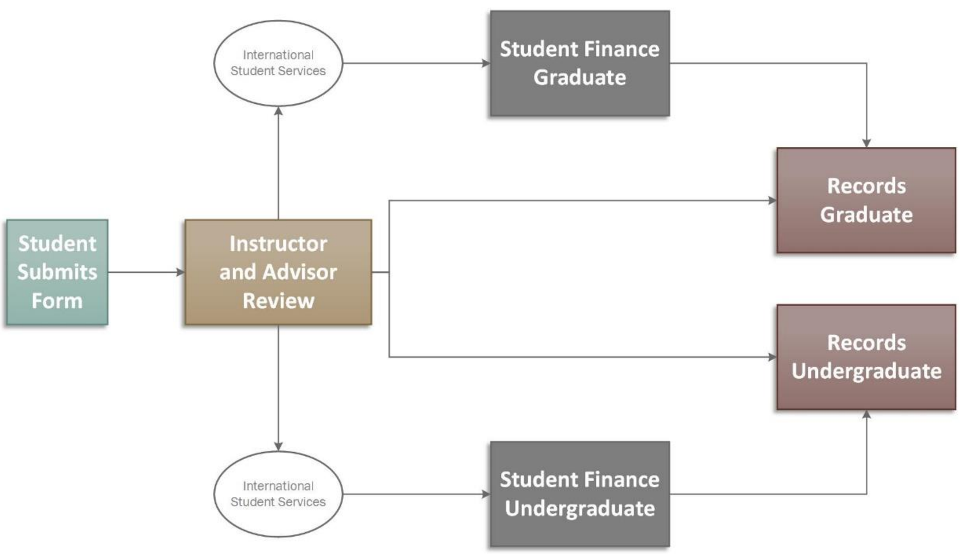
- Simply exit the browser window or tab (there is no logout button within the workflow module)
- Double check for additional tabs/windows you may have left open

If a form is being viewed by another user, you will not be able to access it. The following message will show.



In the event that this message continues to show after an extended period of time, please contact the listed user. If they are they no longer are viewing the document, please reach out to support as outlined below.

An overview of the Add/Drop process



Tech support resources

Michelle Younkin – Records and Advisement

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Brielle Bange – Information Technology

Email – brielleanderson@southern.edu

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