



ONBASE UNITY CLIENT

TRAINING

TRAINING OUTLINE

- Setup
 - Installation of Unity Client
 - Login to Development Server
 - Login Behaviors
- Introduction to OnBase Unity Client
 - What is Unity Client?
 - Overview of Home ribbon
- Overview of Stipend Workflow
 - Diagram of workflow
 - Overview of stipend form
 - Overview of workflow layout
- Role Demonstration
 - Role interactions with form and workflow with an Originator and Budget Approver pair.
- Questions and Support
 - Documentation Instruction Links

WHAT IS ONBASE UNITY CLIENT?

Unity Client is the official desktop client to access and use Hyland Onbase to perform Workflow and Document Management functions.

Your user roles and permissions will determine what you can access and the activities that you can perform. Some users will be strictly Document Management, others will be Workflow users, and some will be able to access tools in both areas. In this training we will focus on the workflow for stipends.

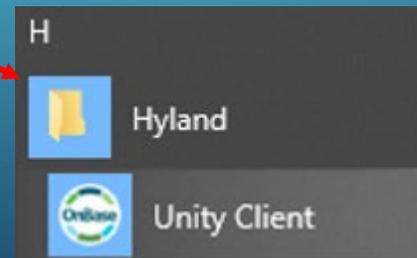
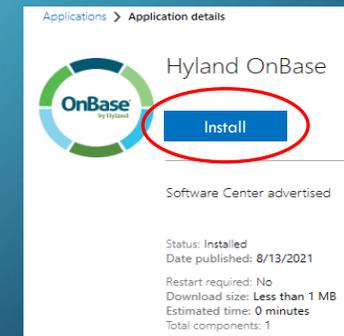
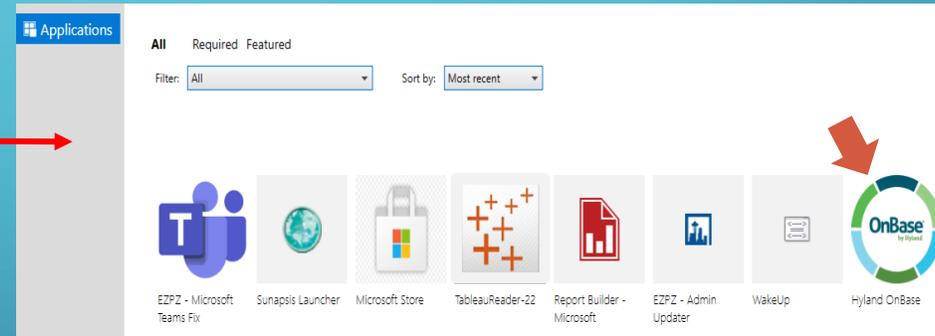
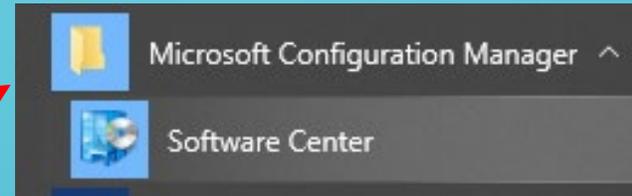
INSTALLATION OF UNITY CLIENT ON OFFICE COMPUTERS

Unity Client desktop application must be installed to use OnBase from the “Production Server” – for real stipends and the “Development Server” – for the training with demo stipends.

To install Unity Client, you’ll need to be on your office computer. There’s no need to install Unity Client on MyDesk. It is already installed. This will not work on Macs, but you can use MyDesk.

INSTALLATION

- Click on the **Start** button  then
 - > **Microsoft Configuration Manager**
 - > **Software Center**
- Click on the **OnBase** icon then on the
 - > **Install** button to start the installation of Unity Client.
- Once installation is successful, the Unity Client app will be located under **Start > Hyland > Unity Client** (used to access the **PRODUCTION** Server).
- **NOTE** – You will not be able to log onto the production server to process real stipends until you have your access setup confirmed after training.

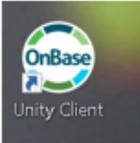


OnBase is only accessible from on-campus PC computers and MyDesk.

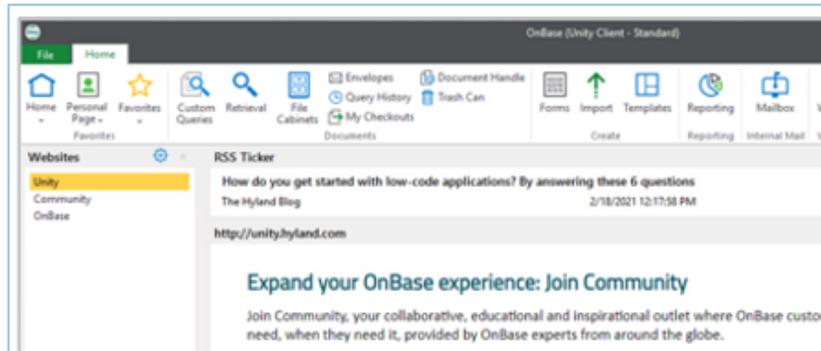
ACCESS ONBASE WITH UNITY CLIENT DESKTOP APP

Install the desktop Unity Client app on your office computer or go to MyDesk. When your access has been set up & confirmed (after training) you can login as follows.

Login to OnBase by following step A or B:

- 1. A. Double-click the “OnBase Unity Client” desktop icon (shortcut)**  
OR
B. Click Start Button (lower left) & select the Hyland folder & Unity Client. 

- 2. Login is normally automatic** with the same credentials used when you logged into the computer. IF you are prompted, login with your MySeattleColleges username and password.
- 3. Once logged into OnBase, the home screen is displayed.**



- 4. To close, select the OnBase icon (upper left corner)**  & from the drop-down menu click **Close**.

These instructions are for accessing OnBase to submit your real stipends on the Production server.

LOGIN BEHAVIORS

- Login is normally automatic when you launch OnBase on your on-campus computer (with Unity Client installed) or via MyDesk.
- IF you do receive the login prompt box, enter your MySeattleColleges (usually first.last) credentials, the one used to log into school computers.

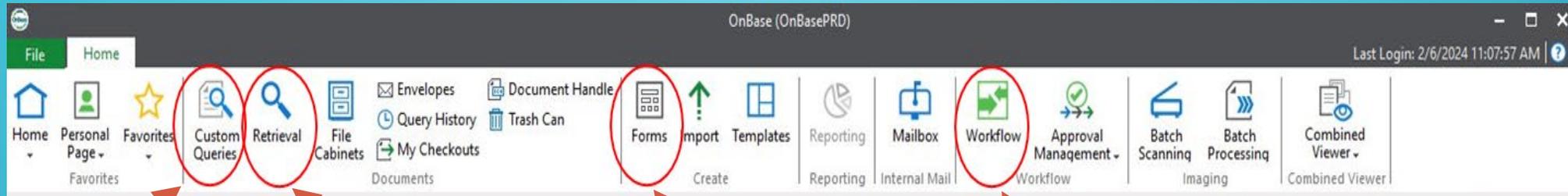
OnBase is only available on campus computers or MyDesk. Use MyDesk from Macs or personal computers.

OnBase[®]
Foundation 22.1

Login Cancel

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Version 22.1.20.1000

OVERVIEW OF HOME RIBBON & TOOLS



CUSTOM QUERIES

Originator/Approver

- Locate Stipend
- Review Approval Status

RETRIEVAL

Business Office

Approver

Payroll

- Locate Stipend
- Review Approval Status

FORMS

Originator

- Submit Stipend Request

WORKFLOW

Originator

- Resubmit Denied Stipend Request

Business Office

- Approve/Deny
- Delegate an alternate Approver

Approver

Payroll

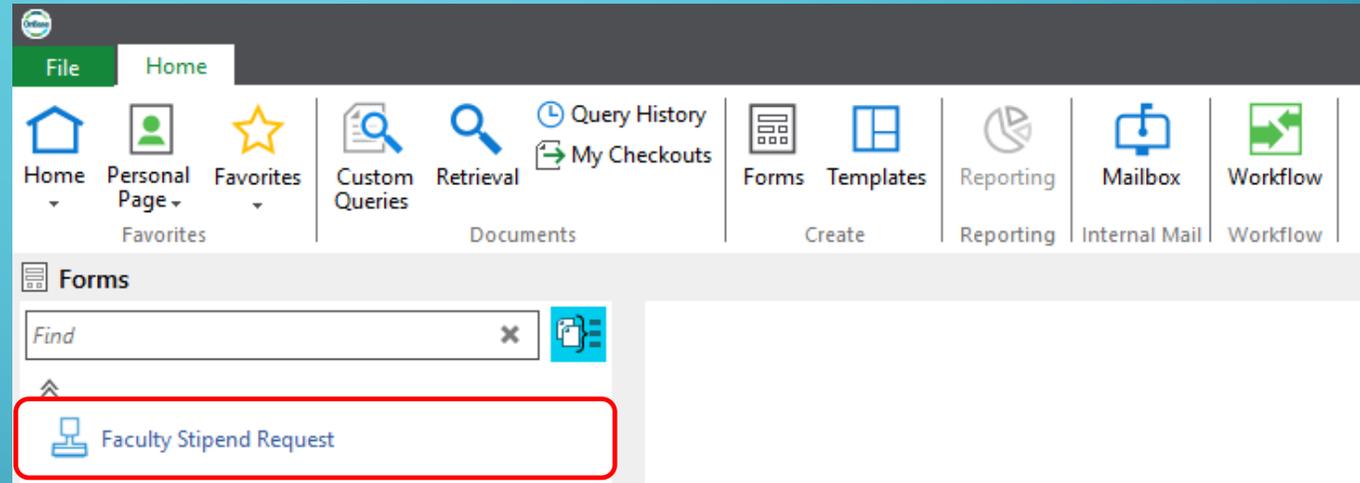
- Approve/Deny

FORMS

Clicking the Forms tool displays a list of forms an Originator is authorized to access.

Forms > Faculty Stipend Request

Click on Faculty Stipend Request to open a new stipend form.



OVERVIEW OF STIPEND FORM

- This is the stipend form under **Forms > Faculty Stipend Request**.
- Only authorized Originators will have access to the form to submit stipend requests for PT or FT Faculty.

You do not need to fill in the blue section. Fill in all required fields marked with a red asterisk. Additional detail fields will auto populate on the form when entering a correct EMPLID and Combo Code.

Faculty Stipend Request

⚠ **End Date**: This field is required.
⚠ **EMPLID**: This field is required. EMPLID is invalid.
⚠ **checkForm_1**: Proper Budget Combo Code(s) must be entered and must add to 100% The name is invalid

STIPEND REQUEST

Document Handle
[Redacted]

Form ID
58

Date
[Redacted]

By
[Redacted]

 **SEATTLE COLLEGES**
North · Central · South

Beta Version: This is a work in progress. All feedback is greatly appreciated. Please include those error reporting zip files when an error occurs. If something works differently than you are expecting, provide screenshots if possible, context, and a data and time. We will work with all involved users to improve this process.

Recipient

EMPLID* [Redacted] **First Name** [Redacted] **Last Name** [Redacted]

Employee Class* [Redacted] **Job Title*** [Redacted] **Campus*** [DISTRICT]

Start Date* [Redacted] **End Date*** [Redacted] **Stipend Supervisor*** [Redacted]

Stipend Attachment (0)

Document Name	Attachment Type	Actions
Available Attachment Types		
HR Letters		Attach HR Letters

Reason for Stipend
[Redacted]

Total Stipend Hours* [Redacted] **Total Stipend Amount*** [Redacted] **Semi-Monthly Amount** [Redacted]

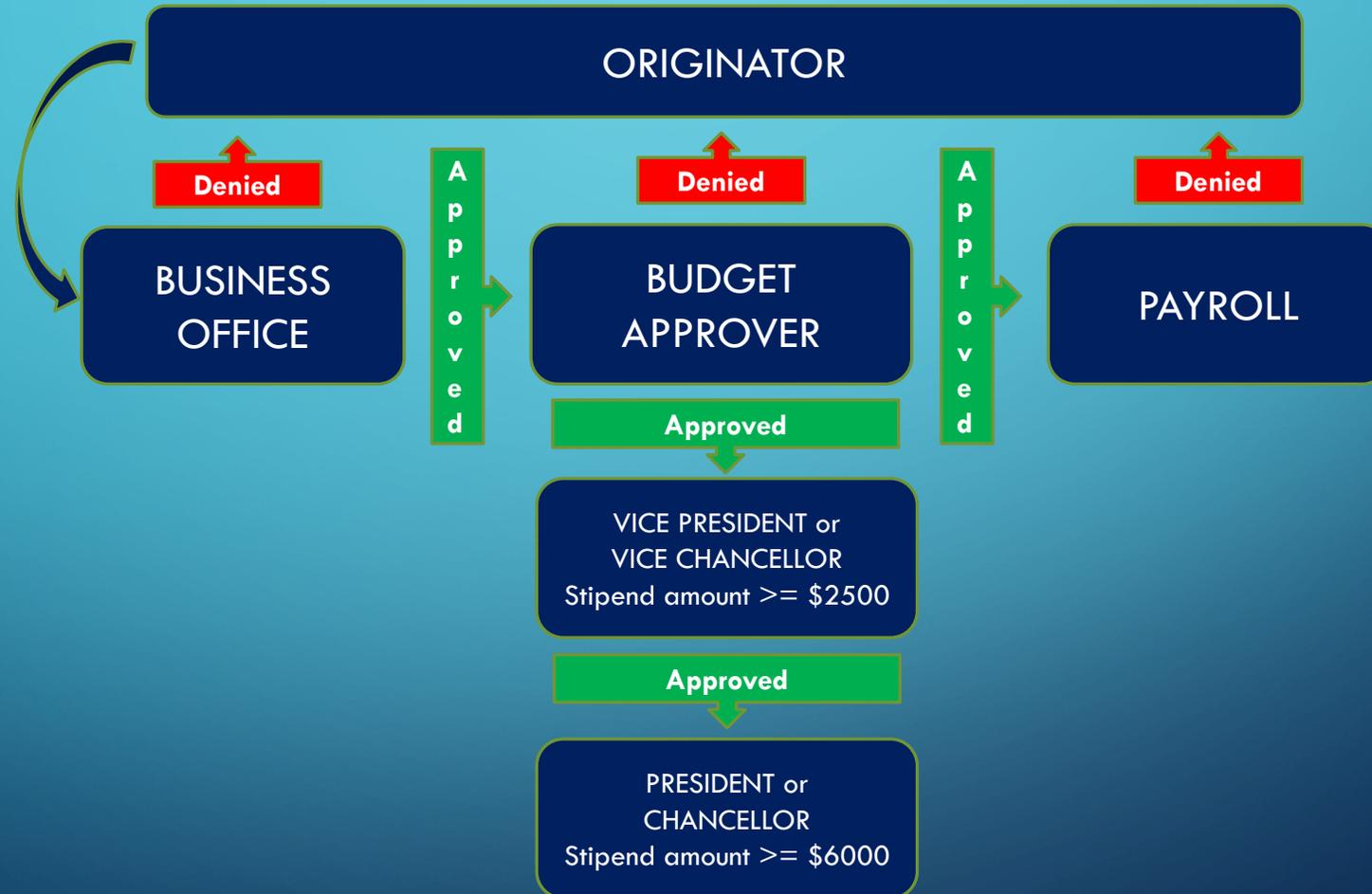
Sum of Percentages
0

*
budget percentages do not add to 100%

A Stipend may not be submitted while the sum of percentages of the budgets applied above or below 100.

DIAGRAM OF STIPEND WORKFLOW

This diagram represents the workflow of the Stipend Request Process



WORKFLOW WINDOW LAYOUT

Ribbon Tool Bar

Provides the tools to perform workflow processes. (ie Approve/Deny)

Life Cycle Workflows

Displays all workflows you have permission to access.

The screenshot shows the OnBase workflow window layout. The ribbon tool bar at the top contains various icons for workflow actions. The Life Cycle Workflows panel on the left lists various workflow processes. The Stipends List table in the center displays a list of stipend entries. The Document Information Panel on the right provides details for a selected document.

Icon	Name	Entry Date
	STIPEND Test User1 (EMPLID 10101010) FORM ID 696	1/29/2024 4:26:12 PM
	STIPEND Test User10 (EMPLID 00000000) FORM ID 714	1/29/2024 2:25:41 PM
	STIPEND Test User11 (EMPLID 11010101) FORM ID 708	1/29/2024 2:22:56 PM
	STIPEND Test User11 (EMPLID 11010101) FORM ID 709	1/29/2024 2:21:23 PM
	STIPEND Test User12 (EMPLID 12020202) FORM ID 711	1/29/2024 2:24:27 PM
	STIPEND Test User2 (EMPLID 10101010) FORM ID 705	1/29/2024 2:19:04 PM
	STIPEND Test User4 (EMPLID 4040404) FORM ID 699	1/29/2024 4:40:41 PM
	STIPEND Test User4 (EMPLID 4040404) FORM ID 699	1/29/2024 2:18:07 PM

Document Information Panel

Provides views of various areas for information of a stipend. One of them being Discussions where the Reason(s) for Denial of the stipend can be found.

Stipends List

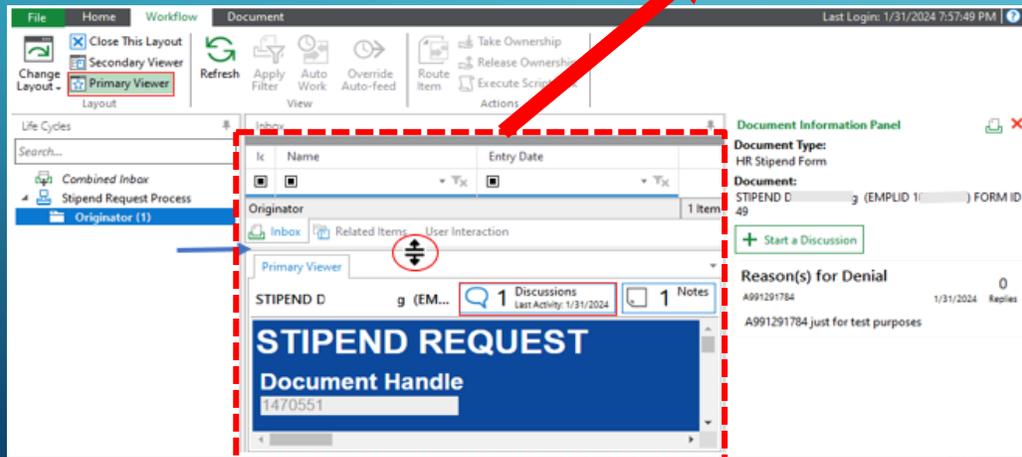
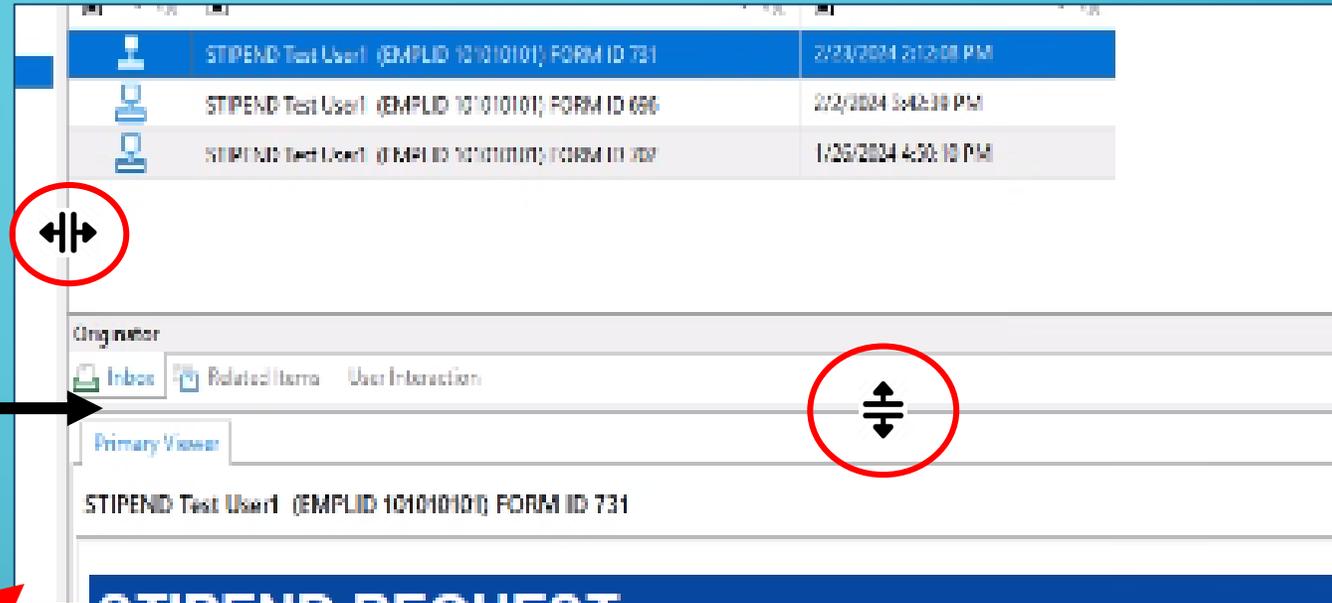
List stipends in which you are part of that workflow process.

NAVIGATION

Viewing Stipends in Workflow

The stipends list or form windows can be expanded with the double arrow icon.

Hover on the line below the Inbox tab for the double arrow icon to appear & drag up or down.



ROLE INTERACTIONS & INSTRUCTIONS (SHARING SCREENS)

STIPEND 1

Originator: Submit a stipend with multiple budgets

Business Office: Approve

Show Originator: Locate & review Approval Status

Budget Approver: Approve

Payroll: Approve/Input Completed

Show Budget Approver: Locate & review Approval Status

STIPEND 2

Originator: Submit a stipend with one budget

Business Office: Approve

Budget Approver: Deny and enter Reason(s) for Denial

Originator: Make updates according to Reason(s) and (re)Submit

Business Office: Approve

Budget Approver: Approve

Payroll: Approve/Input Completed

Links to instruction documents for the above stipend submittal & workflow steps will be provided.

WHEN TO START USING ONBASE FOR FACULTY STIPENDS

Please Note – After the training you will start your access to the OnBase **Production** Server with Unity Client. We will confirm when your access to OnBase is ready for use.

Note - Originators can process any new stipends in OnBase for the Budget Approver you are paired with in this training. But if a stipend needs approval by any other Budget Approver, they must have completed training and be set up with access to OnBase before they'll be able to approve stipends in OnBase.

After March 31, 2024, no new stipends can be processed in Liquid Office. New stipends must be submitted in OnBase starting April 1, 2024, Any existing stipends in Liquid Office will need to be completed in Liquid Office.

[OnBase > Unity Client - Production Server Access](#)

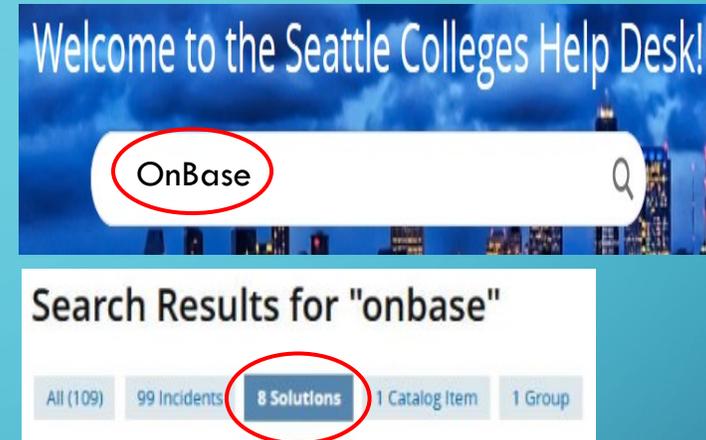
QUESTIONS & SUPPORT

HELP DESK

<https://helpdesk.seattlecolleges.edu/>

VIEW ONBASE DOCUMENTATION

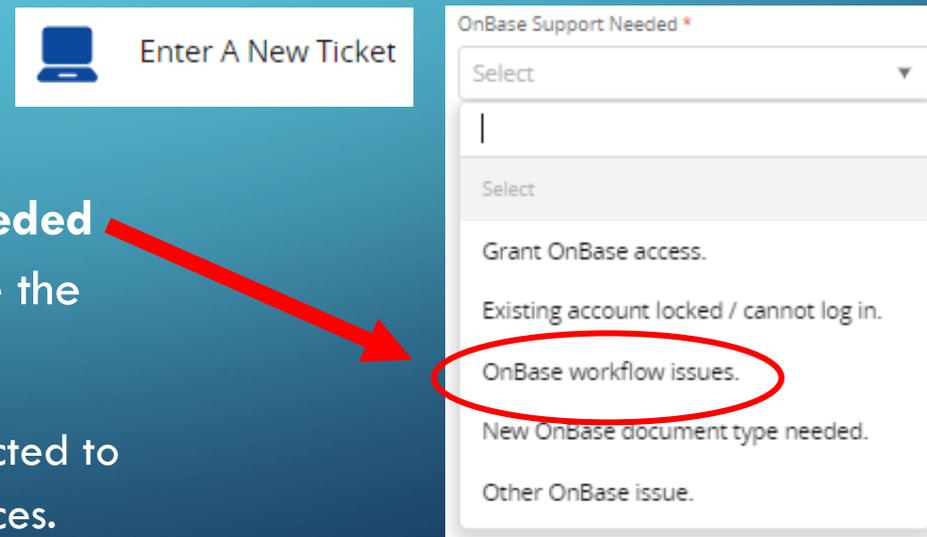
- In the search bar – enter **OnBase**
- Select **Solutions**



SUBMIT A HELPDESK TICKET

- Select **Enter A New Ticket**
- Select **OnBase** category
- Select the type of **OnBase Support Needed**
- Provide an **attachment** to help describe the issue.

Note – Some questions may need to be directed to the Business Office, Payroll or Human Resources.



LINKS TO ONBASE DOCUMENTATION

For further in-depth information please see these links.

- [OnBase > Help Articles](#)
- [OnBase > Unity Client - Installation](#)
- [OnBase > Unity Client - Production Server Access](#)
- [OnBase > Workflow - Stipend Submittal - Unity Client](#)
Instructions include: Originator Submittal, Resubmittal & Reviewing Approval Status.
- [OnBase > Workflow - Business Office Stipend Processing- Unity Client](#)
- [OnBase > Workflow - Stipend Approval - Unity Client](#)
Instructions include: Budget Approver Approval, Denial & Reviewing Approval Status.
- [OnBase > Workflow - Payroll Stipend Processing - Unity Client](#)
- [OnBase Custom Queries - Stipend Approval Status – Originator](#)
- [OnBase Custom Queries - Stipend Approval Status – Approver](#)
- [OnBase Custom Queries - Stipend Approval Status - Business Office](#)

TIPS FOR FILLING OUT STIPEND REQUEST FORMS

- Do not need to fill in the blue section at the top of the form.
- Fill in all required fields marked with a red asterisk.
- Entering an EMPLID fills in the first & last name fields.
- Entering a Combo Code automatically populates the budget details & approver list sections.
- Email notifications are sent to each role involved in the stipend workflow to, confirm submission, notify stipend is in queue awaiting approval & confirm stipend has been approved or denied.
- Start & End dates cannot be the same. You can choose the next day for an End date.
- Do not use a dollar sign or commas for stipend amounts.
- Always turn off Primary Viewer & click the Refresh button after viewing a stipend form **and before** clicking Approve or Deny. This prevents the stipend from being locked to other users. If this doesn't release the form for the next user – close out of OnBase & have the next user click their Refresh button.
- Click Remove button if incorrect stipend amount or combo code is entered. Click Add button to re-enter correct amount or code.
- When resubmitting a denied request, you can edit the stipend amount, but must click the Remove & Add buttons to edit the Combo Code.
- Click Add button to add additional combo codes for a multiple budget stipend.
- Move through the fields with a tab or click. Clicking the enter key will result in an error message, if you are not at the submit step yet.
- If you do not see the submit button, confirm that the percentage is 100 percent. Or you may need to click/tab out of the last field for the submit button to appear.
- If you know the budget approver is going to be unavailable, you may contact the business office to let them know you need an alternate approver.

For detailed instructions Originator Submittal, Resubmittal & Reviewing Approval Status see [OnBase > Workflow - Stipend Submittal - Unity Client](#)