

Approving/Processing Forms in OnBase - Quick Guide -

Glossary of Terms

Lifecycle: Within OnBase Workflow, a lifecycle consists of a series of queues and tasks that represent the business process.

Queue: A queue within a lifecycle represents a specific step of the business process and contains a set of tasks that can be performed on documents that are in that step of the process.

Task: Sometimes called an 'Ad Hoc Task', these represent actions a user can take on a document in a workflow queue. Often, you will need to approve or deny requests. If you deny a request, you likely will be required to enter a reason that will be communicated back to the form submitter.

Unity Client: OnBase software installed locally on a Windows computer.

Web Client: Browser-based OnBase software for users with a Mac or without Unity Client installed.

Workflow: Workflow is the module of OnBase that provides automatic processing and routing for documents based on business rules.

Email Notification

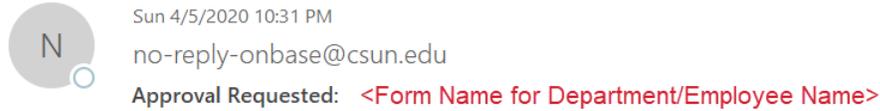
You will receive an email notification if a form is waiting for your action in OnBase.

The email will contain the name of the lifecycle and queue you will need to locate in OnBase as well as a link to the Web Client.

Workflows created for the Office of Human Resources begin with "HR".

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A sample Approver email notification is shown below.



To  <Approver Email>

Hello <Approver Name> ,

A <Form Name> request was submitted for <Department/Employee Name> and is ready for your review.

Please login to OnBase and open Workflow. Then go to the ' <Lifecycle Name> ' lifecycle and open the ' <Queue Name> ' queue to view the request. You can make changes to what has been submitted, as appropriate, and approve or deny the request.

[To log in to OnBase through the Web Client \(if you do not have Unity Client installed on your computer\), please click here.](#)

Thank you.



To learn more about how CSUN uses OnBase, visit the campus' OnBase website at <https://www.csun.edu/it/onbase>.

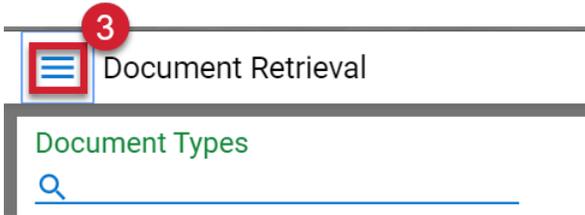
Navigating Web Client

1. Navigate to the [Web Client login page](#).
2. Log in using your myNorthridge Portal credentials.

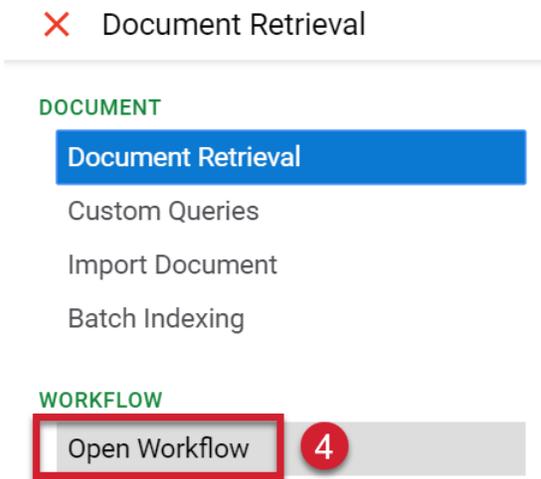
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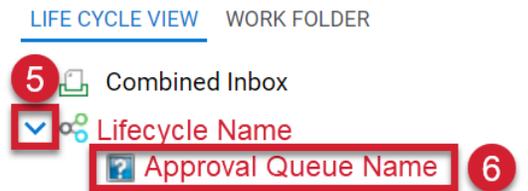
3. Select the three lines next to "Document Retrieval".



4. Under "Workflow" select "Open Workflow". This will open Workflow in a new window.



5. Locate the lifecycle described in the email and click on the arrow to its immediate left.
6. Locate the queue described in the email and select it.
7. Any forms waiting for your review will appear in the queue.
8. Select any pending form to review it and perform a task.
9. Drag the bar separating the queue from the document viewer to expand or shrink the document viewer area.

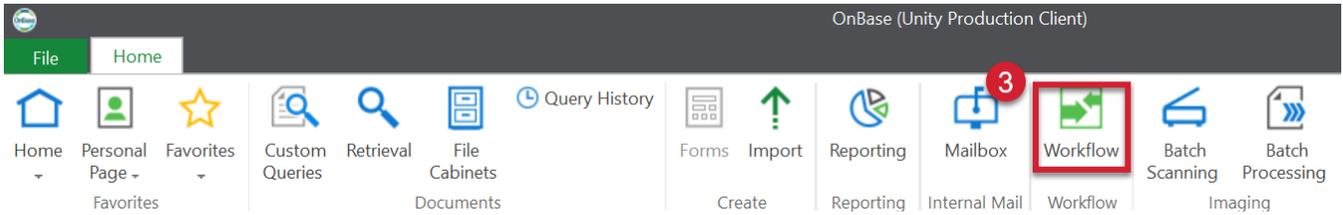


Navigating Unity Client

1. Open Unity Client on your computer.
2. Log in using your myNorthridge Portal credentials.
3. Select Workflow from the ribbon.

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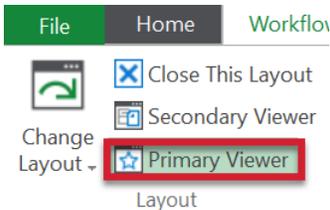
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4. Locate the lifecycle described in the email and click on the arrow to its immediate left.
5. Locate the queue described in the email and select it.



6. Any forms waiting for your review will appear in the queue.
7. Select any pending form to review it and perform a task.
8. If you select a form to review it and don't see it, go up to the Layout portion of the ribbon and select "Primary Viewer".



9. Drag the bar separating the queue from the document viewer to expand or shrink the Primary Viewer area.

Completing Tasks

Tasks are different depending on your role in the specific workflow you are accessing, but often you will be asked to Approve, Deny, Complete, or Void a request, by selecting one of the task buttons on the ribbon within the queue.

If you Deny or Void, you will likely be asked to enter a reason, which will be sent back to the form submitter in an email notification.

After you review the form and complete your task, the form will leave the queue and move on to the next step in the workflow if applicable.

