

Overview

HR OnBase allows for one or more level of basic approval for documents that are submitted to Human Resources via the online HR Document Intake form.

Your school's or unit's participation and approval setup is coordinated with your Dean's or VP's office. For questions regarding your workflow rules, approver status, or internal processes, please contact the appropriate office directly.

Accessing Your Workflow

When a transaction is submitted for review, all relevant approvers will receive an email from **OnBaseNotificationsNoReply@northwestern.edu**. Access your transactions using one of the following methods:

- Click the **web link** in the provided email (this method directly opens the transaction).
- Log into OnBase Workflow online at: <https://onbase.northwestern.edu/appnet/Workflow/WFLogin.aspx> (Note: if you are on the NM network and your NetID doesn't work, try using **ads\NetID** as your user name.)
 - a. Open the **HR – Intake & Processing** lifecycle
 - b. Select the **Pending Approval** folder
 - c. Click a transaction in the **Pending Items** worklist
- Open the OnBase Unity program on your computer (requires installation)
 - a. Click the **Workflow** button in the ribbon
 - b. Open the **HR – Intake & Processing** lifecycle
 - c. Select the **Pending Approval** folder
 - d. Click a transaction in the **Pending Items** worklist

REQ #	LAST NAME	FIRST NAME	HR REQUEST TYPE	REQUEST STATUS	REQUESTED
60705		AMELIA	TEMP NON-STUDENT HIRE	PENDING APPROVAL	DATTELS
61062		GOTT	POSN/APPT FORM	PENDING APPROVAL	BRYCE,D
61064		SONG	POSN/APPT FORM	PENDING APPROVAL	BRYCE,D
61178		BRAHIM	POSN/APPT FORM	PENDING APPROVAL	BRYCE,D
61213		LI-LI	POSN/APPT FORM	PENDING APPROVAL	COLSON
61307		KAREN	POSN/APPT FORM	PENDING APPROVAL	IRWIN,SE

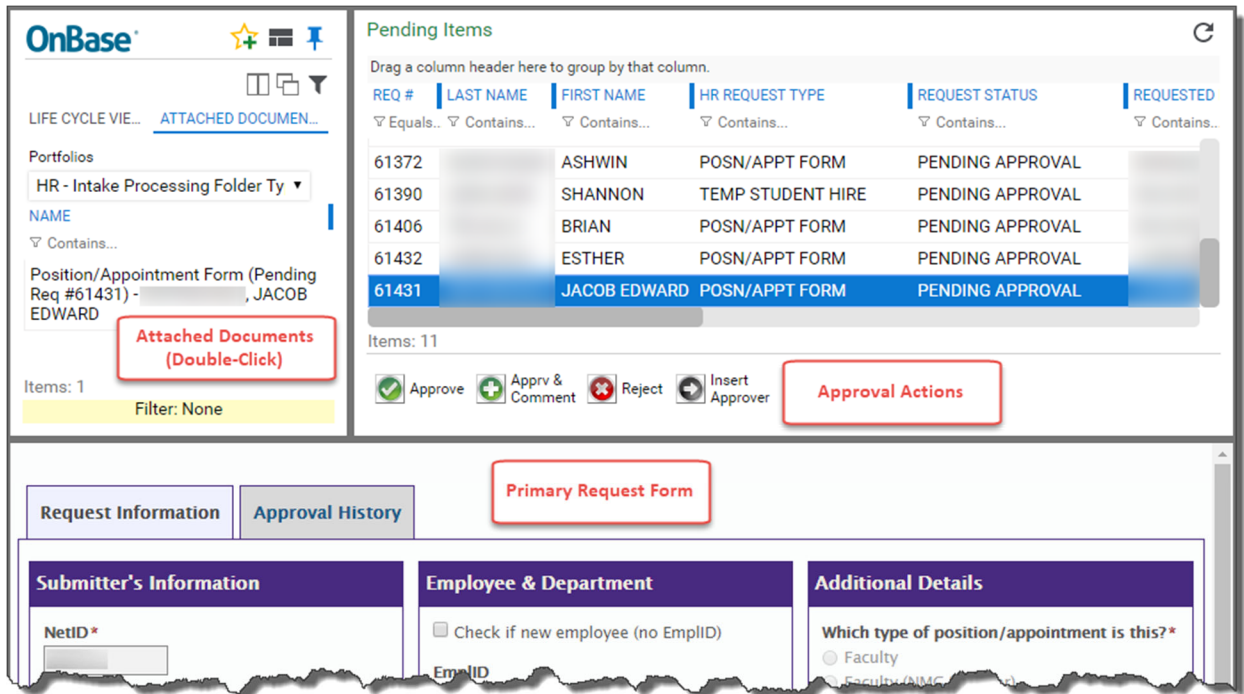
Items: 11

Approve
 Apprv & Comment
 Reject
 Insert Approver

Initial Workflow view. Sort large lists by clicking column headers, or filter for specific transactions by selecting the filter icon at the top of any column. Sections can be re-sized by clicking and dragging the borders between each box.

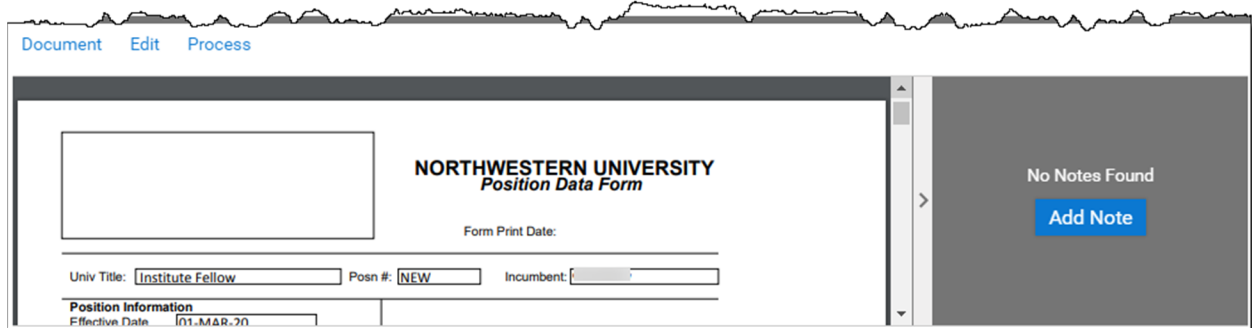
Viewing a Transaction

1. Select an item from your **Pending Items** workload.
 - The Primary Request Form, with comments and additional tabs, is displayed below the workload.



Item view. The Primary Request Form appears at the bottom, with attachments visible in the top left.

2. Review attached documents by double-clicking a form in the **Attached Documents** box.
 - To add notes to the attached document, click **Add Note** in the bottom right. Notes are visible by all future approvers and HR Operations, and are permanently stored with the document.
 - To print or download/save the attachment, select **Document > Print** or **Document > Send To > File**.
 - To return to the Primary Request Form, re-click the item in your Pending Items list.







Attachment view. When viewing an attached document, it will appear in the bottom section with its notes to the right.

3. Take action by clicking one of the **Approval Action** buttons below the Pending Items box (see next section).

Approval Actions

You can process your approval or rejection for each transaction by using one of the following options.

 Approve	<p>Apply your approval to the transaction and immediately send it to the next approval level.</p>
 Apprv & Comment	<p>Apply your approval, but enter a brief comment first.</p> <p>This comment will be included in the workflow grid for the next approver, or for HR Operations (if you are the final approver). It be visible to all users in the “Comments” box on the request form. If you are the final approver, your comment will be included in the “Approved” email that is sent to the requestor.</p> <p>Note: This is best used for a brief administrative comment. To record more detail or to indicate changes to the request itself, use the “Add Note” feature on the a document.</p>
 Reject	<p>Reject the transaction.</p> <p>You are required to enter a rejection reason (up to 250 characters) which will be included in an automatic email to the requestor. You may also edit the email address(es) that will receive the rejection notice.</p> <p>Rejected transactions are sent back to the requestor. They are deleted from HR’s records and must be re-entered and processed through all approval levels again.</p>
 Insert Approver	<p>Add an additional approver by selecting their NetID from a drop-down list.</p> <p>The inserted approver will receive an email notice and must approve the transaction before it moves to the next approval level.</p> <p>Note: This does not replace your obligation to approve. You, or another default approver at your level, must still approve the transaction.</p>
<p><i>Depending on your approval role and access, you may have additional options that are not listed here.</i></p>	

Approval Tips

- Only approvers require security access to log into OnBase. Any active employee with a NetID may submit documents for review by using this link:
<https://www.northwestern.edu/hr/essentials/hr-systems/myhr/administration/forms/document-submission.html>
- If you submit a transaction and are also an approver, approval will be applied automatically for your approval level. Your transaction will still route to any other level for which you are *not* an approver.
- Though an approval level may have multiple approvers, only one person needs to take action for the transaction to move forward. If someone else at your level approves or rejects the transaction, it will be removed from your list.
- For security reasons, you can only access the request forms and attachments while they are pending your approval. Once you approve or reject an item, you cannot retrieve the documents.
- “Approval Required” emails are sent to each approver, for every item. If you prefer to manually check your approval list, you may wish to set an Outlook rule to manage the emails. All messages (and *only* these messages) will be sent from **OnBaseNotificationsNoReply@northwestern.edu**.
- Due to the nature of some transactions, you may see attached documents that are not necessary for your review process (e.g. tax forms). Like all HR processes, approvers are expected to exercise discretion with any data accessed in OnBase.
- OnBase maintains a robust audit record each time a document is viewed, modified, saved/printed, approved/rejected, and more. This audit information can be provided to administrators upon request as necessary.