Instructions for the OnBase HR Systems Security Access Approval Process

For School/Unit Approvers

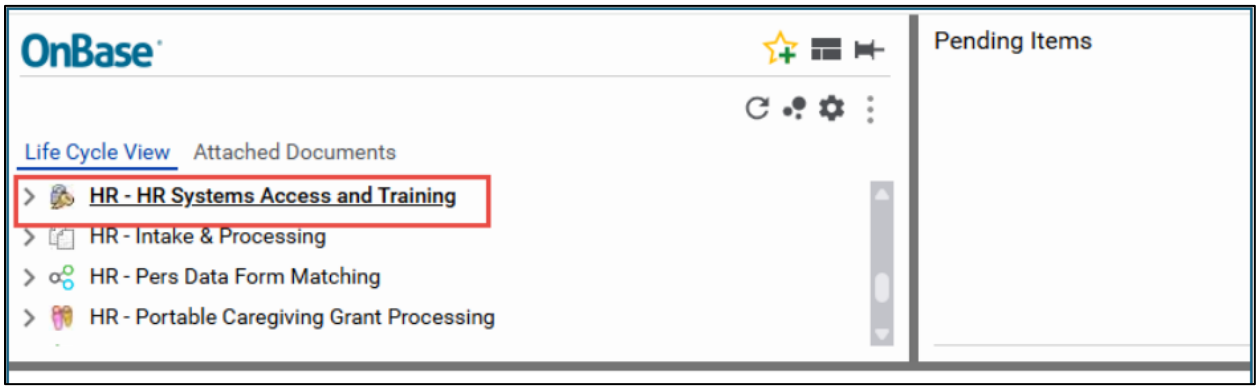
When a HR Systems Security Access Request has been submitted, approvers will receive an Approval Needed email.



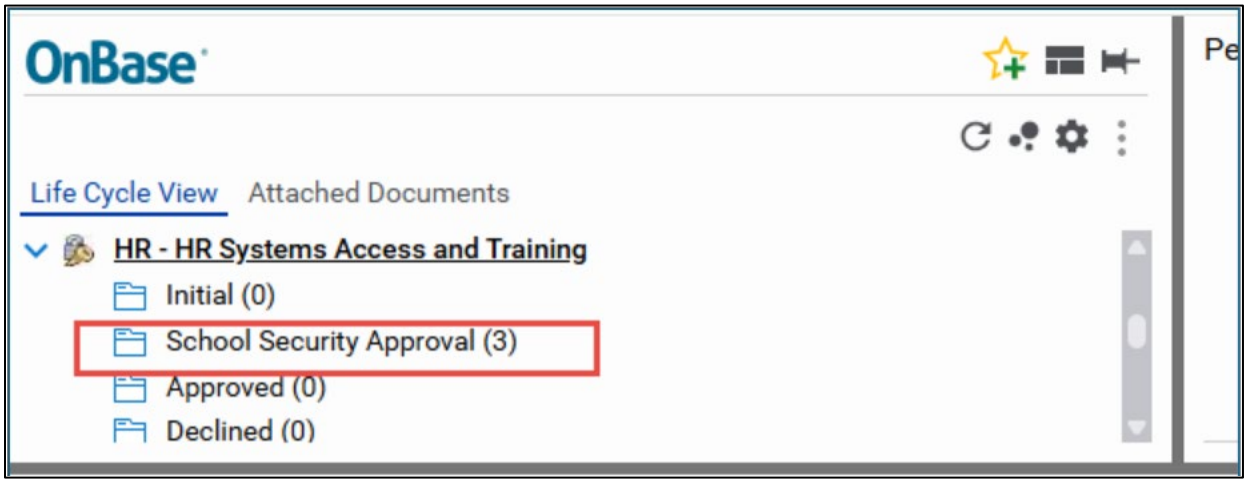
If you are a school/unit approver, log into OnBase.

- If you have OnBase installed on your computer, use that version.
- If you don't have OnBase already installed on the computer, use the web version: OnBase web portal.

On the left, find **HR – HR Systems Access and Training.** Click the arrow **>** next to it.



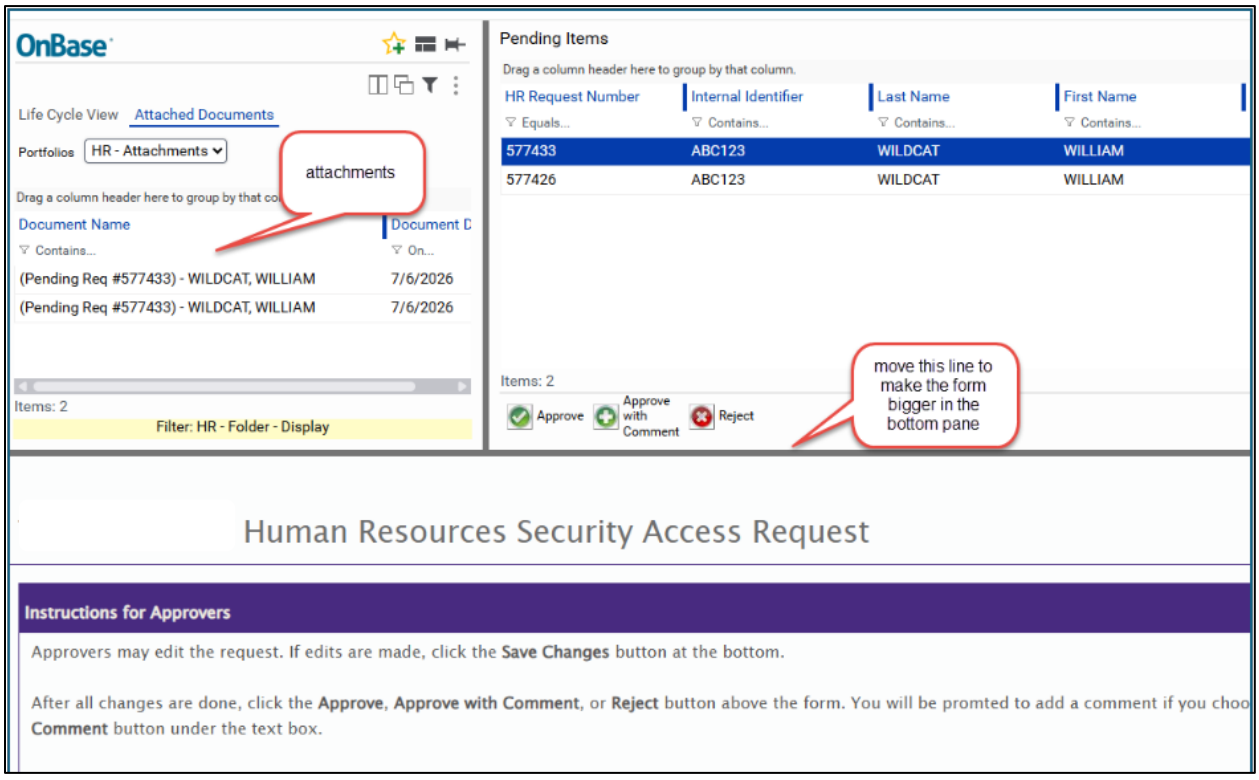
Click on the **School Security Approval** folder.



In the **Pending Items** list, click on the item you want to review.

The form is visible at the bottom. You can drag the grey horizontal line up to make the bottom reading pane bigger.

Any **Attached Documents** are shown on the left. Double-click the attachments to view/download them. Excel attachments will automatically download. PDF attachments can be viewed in the OnBase application. If the PDF is open in the bottom reading panel, click the row in the Pending Items to return to viewing the request form.



On the submitted request, approvers:

Can NOT change:

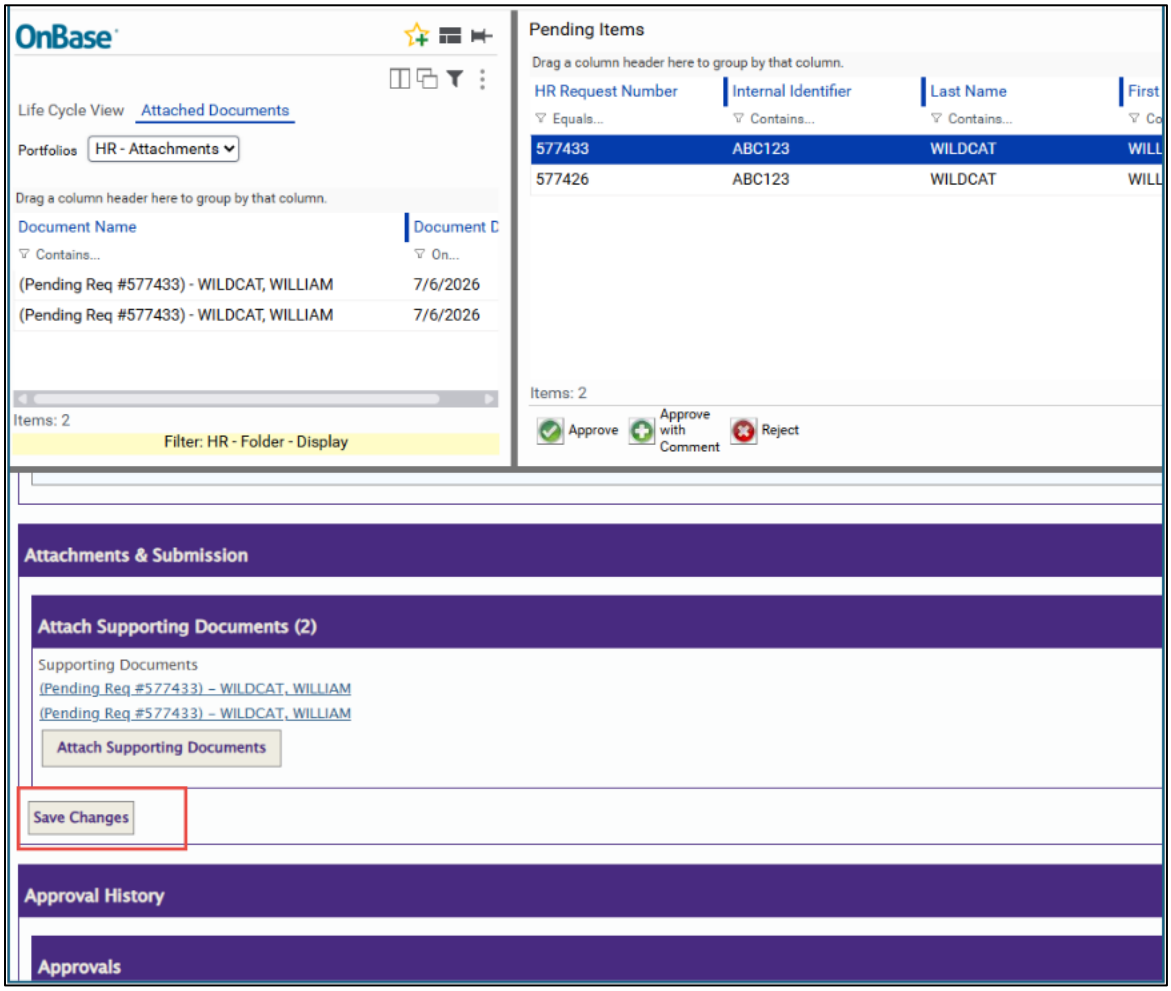
- Requester information
- Applicant information

Can change:

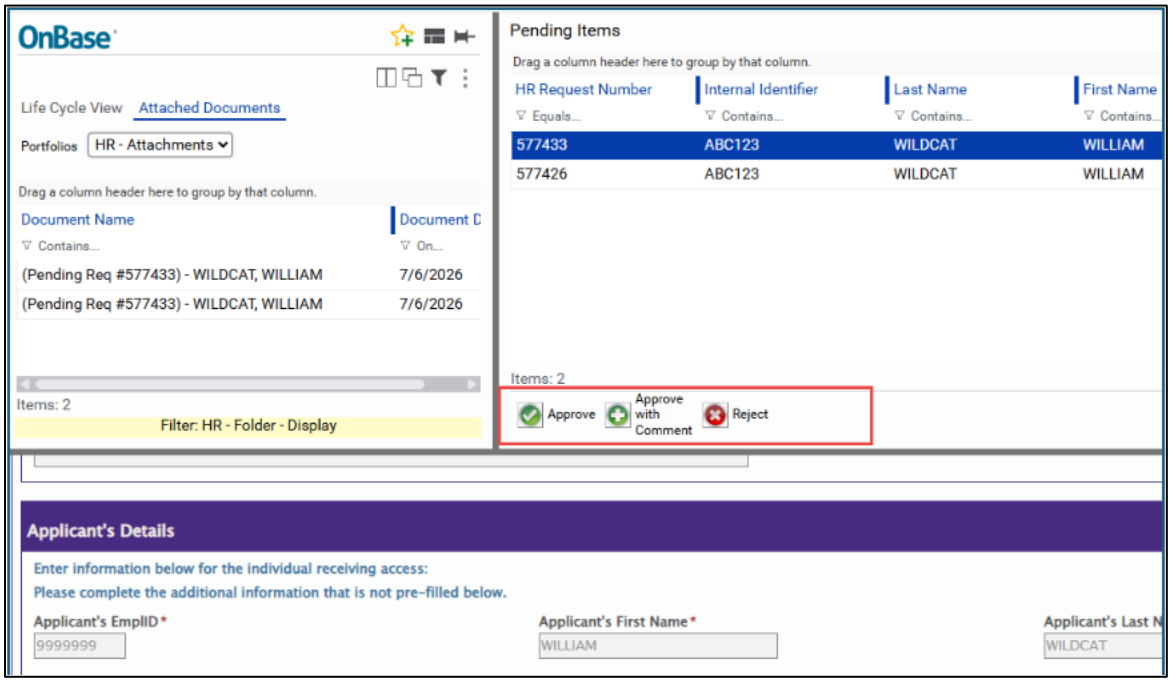
- DeptID/nodes
- Any roles checked or unchecked
- Additional Emails
- Attachments

Note: If significant changes are needed, please Reject request and ask Requestor to submit a new request.

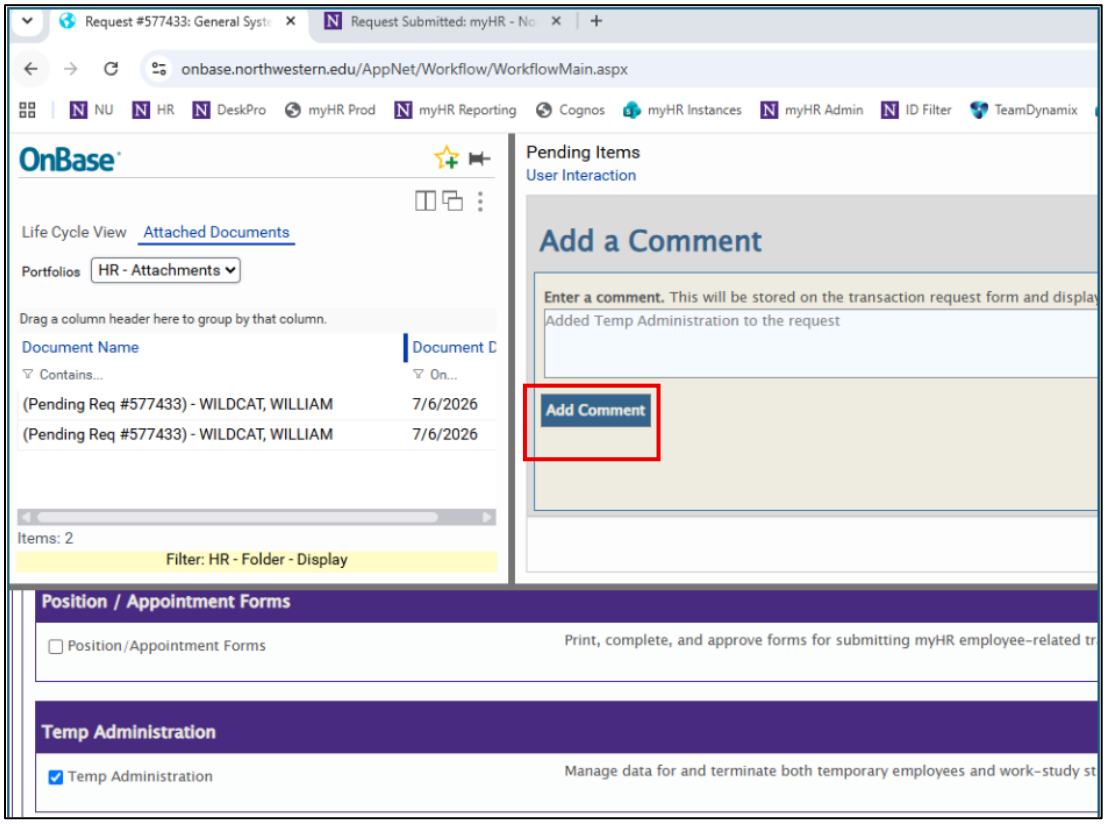
If any changes are made to the request, click the **Save Changes** button at the bottom. *You must Save Changes before you can approve or reject the request.*



Next, click the **Approve**, **Approve with Comment**, or **Reject** button above the form.

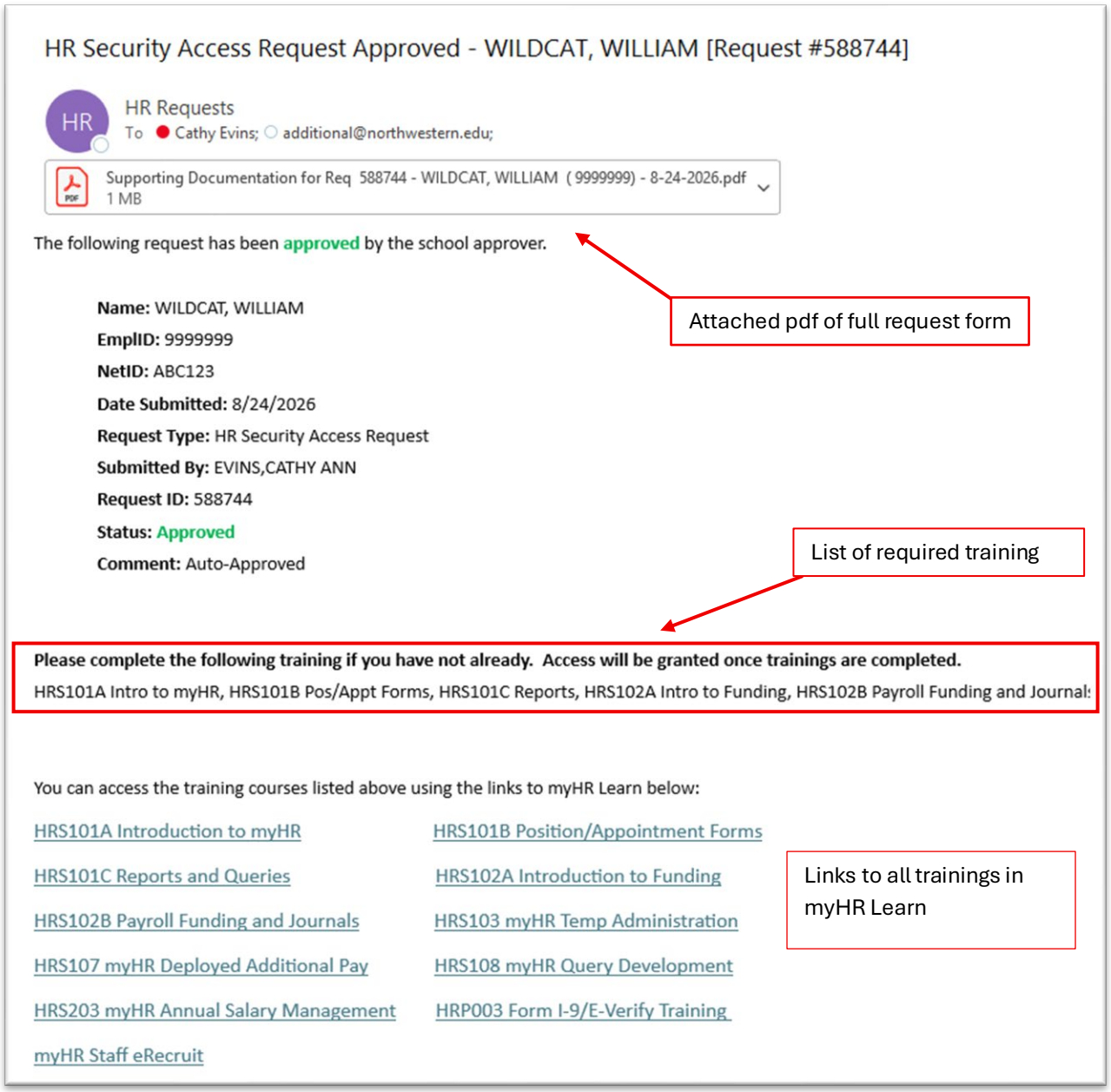


For **Approve with Comment** or **Reject** options, a **Comment is required**. Use the Add a Comment box to indicate any changes made to the original request or the reason for the rejection. Click the **Add Comment** button under the comment text box.



After you process the approval, a PDF version of the request form is generated.

After approval, the Requestor and the Applicant receive a notification email. (This can take up to 10 minutes for email to arrive after approval). The email includes an attached pdf version of the full form as well as the list of required training courses.



Once approved, the HR Training and HR Security teams review the request and check that the employee completed all the necessary training. If all training is completed, then all access and roles are granted. If only some training is completed, then the applicant will be given security access and roles based on completed training. Emails are sent to the Requestor and the Applicant when access is granted.

Notifications during process:

Workflow stage	Notification Email to:
Received	Requester
Approval Needed	Approver
Approved	Requester and Applicant
Rejected	Requester
Partial Access Granted	Requester and Applicant
Completed	Requester and Applicant

*All notifications to Requester also sent to any Additional Emails listed on the request