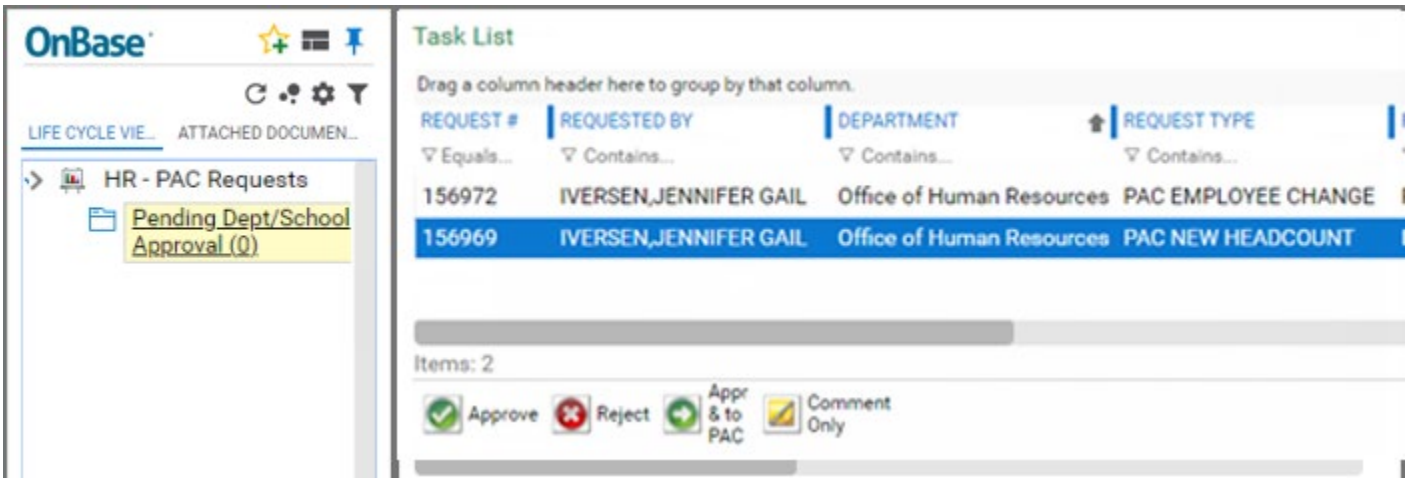
Accessing Your Workflow

When a transaction is submitted for review, all approvers (Primary and Backups) will receive an email notification. Access the transaction using one of the following methods:

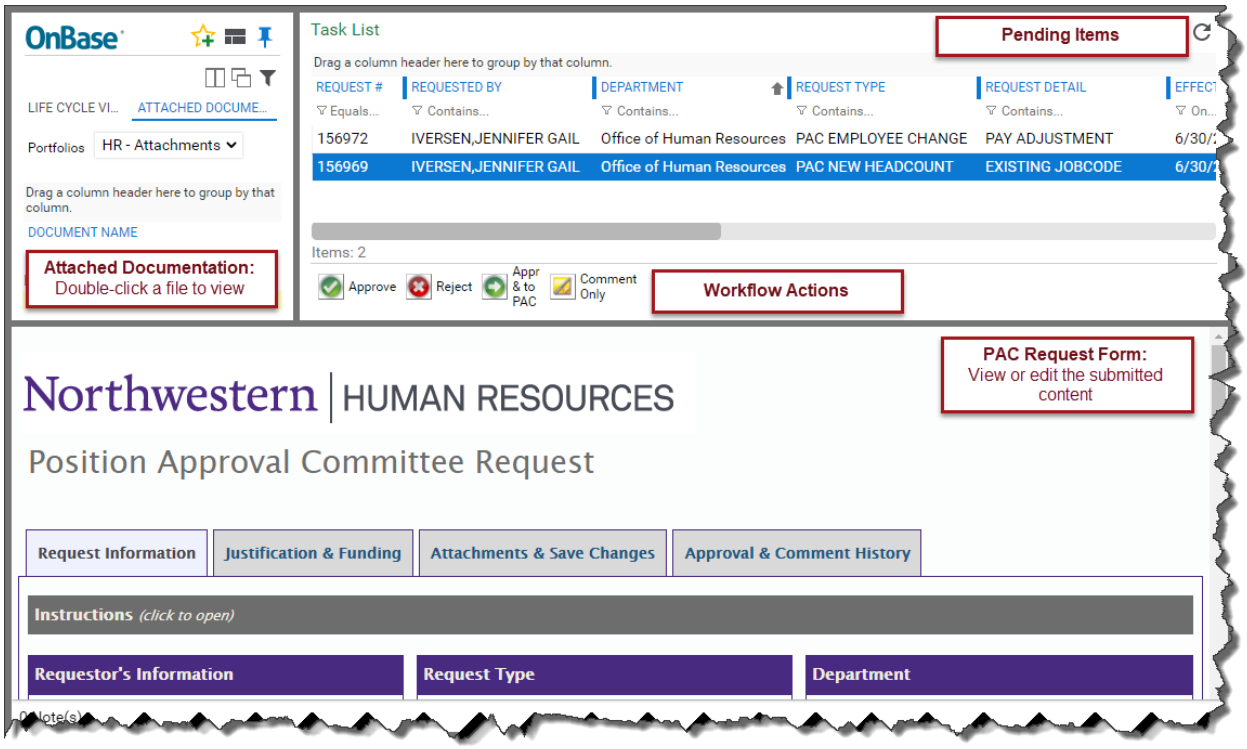
- Click the **web link** in the provided email (directly opens to the indicated transaction).
- Log into OnBase Workflow online at: https://onbase.northwestern.edu/appnet/Workflow/WFLogin.aspx *(Note: if you are on the NM network or another domain and your NetID doesn't work, try using* **ads\NetID** *as your user name.)*
  a. Open the **HR – PAC Requests** lifecycle
  b. Select the **Pending Dept/School 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 Dept/School Approval** folder
  d. Click a transaction in the **Pending Items** worklist



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.*

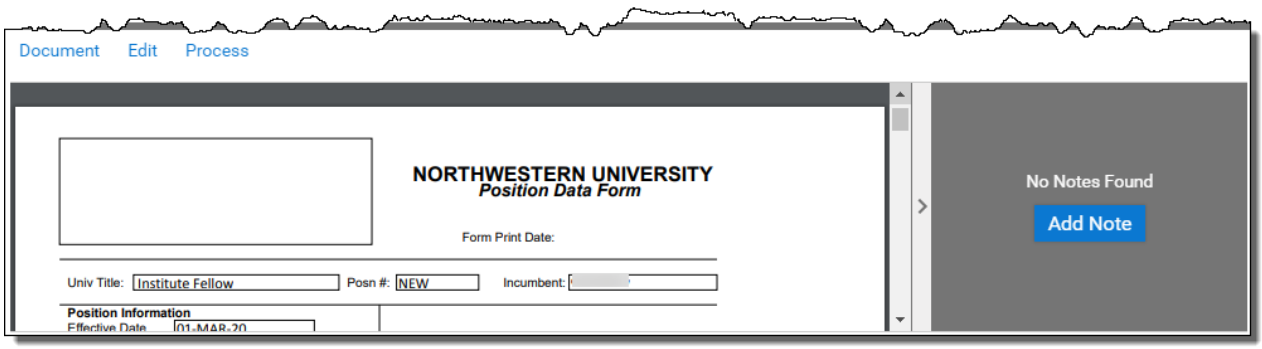
Viewing a Transaction

1. Select (single-click) an item from your **Pending Items** worklist:
   - The **PAC Request Form** is displayed below the worklist.
   - Any **Attached Documents** are available in the top left window.
   - **Workflow Action** buttons are below the Pending Items list and just above the PAC Request Form.

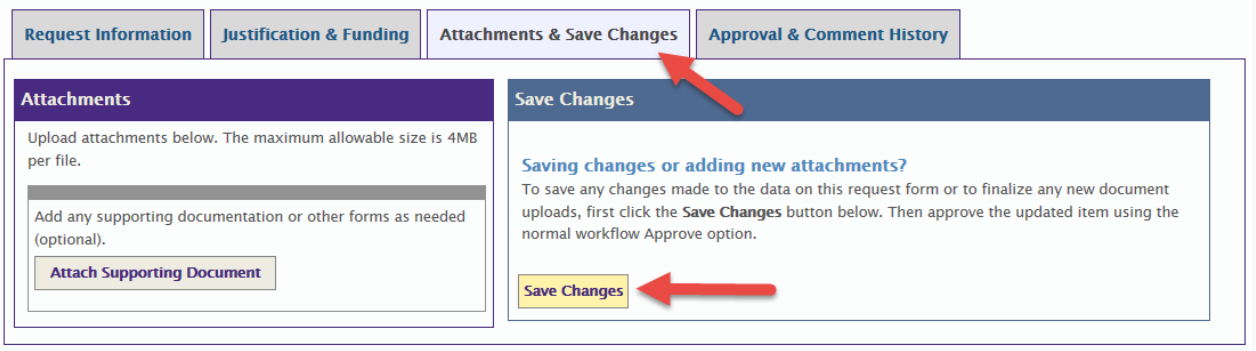


Item view. *The Primary Request Form appears at the bottom, with attachments visible in the top left.*

2. To open an attached document, double-click it in the **Attached Documents** box.
   - To add notes to the attached document, click **Add Note** in the bottom right. Notes are visible to all future approvers 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 PAC Request Form, single-click the item in your Pending Items list.



3. Approvers may update the information on the Form itself, or add new attachments to the request, by editing the PAC Request Form directly.
   - Once changes have been made, proceed to the **Attachments & Save Changes** tab on the form, and click the **Save Changes** button.
   - You must Save Changes before approving the request itself. While new attachments may be added, existing attachments *cannot* be deleted.



Workflow Actions

Use the **Workflow** Action buttons directly above the PAC Request For, to process your approval or rejection for each transaction:

- Approving or Rejecting will allow you to add a **Comment** up to 250 characters long (optional for approvals; required for rejections). This Comment will be permanently stored with the form.
- When Approving or Rejecting, you will be able to modify **Email Contacts** associated with the request. This allows approvers to add or remove email contacts as needed.
- If you accidentally select the wrong option, click **Discard and Cancel** to return to the main screen.

Sample Approval Screen. *Both the Approval and the Rejection screen will provide similar options.*

Depending on your level of access and your school's workflow process, some or all of the following action buttons will be available:

Approve	**Apply your approval to the transaction and immediately send it to the next approval level. If you are the final approver, the request will be routed to PAC.** If you are the final school/unit approver, the Email Contacts will be notified that the request has been approved and routed to PAC. Your optional comment will appear in that email. **For users of advanced/ad hoc approvals only:** You will be asked to select the NetID of the next approver for this request. If you are the *final* school approver, use the "Appr & to PAC" button instead (see below).
Reject	**Reject the transaction.** The Email Contacts will be notified of the rejection, and your rejection comment will be included in the message. For reference, the email will include an attached copy of the original Request Form and any supporting documentation. Upon rejection, the entire request is deleted from the system and must be re-entered and processed through all approval levels again.
Appr & to PAC	**For users of advanced/ad hoc workflow: Apply final school approval.** If you are using advanced (ad hoc) approvals, the *final* school approver must click this button to Approve the transaction and route it to PAC. If you are not using advanced approvals, you will receive an error message.
Comment Only	**Add a comment to the request, but do not take Approval or Rejection action.** Use this option if you would like to add a Comments to the request, but you do *not* want to approve or reject at this time. The Comment will be displayed in the far-right column of your Pending Items grid and will be permanently added to the Comments tab on the form. The item will remain in your list until you Approve or Reject it.
Depending on your approval role and access, you may have additional options that are not listed here.	

Approval Tips

- Only approvers require security access to log into OnBase. Any active employee with a NetID may submit requests.
- If you submit a transaction and are also an approver, approval will be applied automatically for your approval level(s). Your transaction will route to any other level for which you are *not* an approver. You will receive the usual "Approval is Needed" email message, but the item will be immediately removed from your worklist.
- If you are an approver at multiple levels, applying your approval once also will apply it for each subsequent level in which you are 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. All documents are attached to the final approval or rejection email for your reference.
- "Approval Required" emails are sent to each approver, for every item (even if your item is auto-approved). If you prefer to manually check your approval list, you may wish to set an Outlook rule to manage the emails.
- Due to the nature of some transactions, you may see attached documents that are not necessary for your review process. Like all HR processes, requesters and 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 neces

System Emails

The following emails will be sent automatically from the system:

Email	Sent When…	Sent To…
Submitted for School Approval	A new PAC Request Form is submitted by the requestor.	Email contacts entered by the requestor.
Requires Your Approval	A Request Form is routed to your approval level.	All approvers at that approval level, including Primary, Backups, and active Delegates.
Sent to PAC	The request has been fully approved by all department and school/unit approvers and has been routed to PAC for review.	Email Contacts entered by the requestor and approver. *
Rejected by Dept/School	Any department or school approver rejects the request.	Email Contacts entered by the requestor and approver. *
Approved by PAC *or* **Conditional Approval from PAC**	PAC has reviewed the request and applied their Approval or Conditional Approval.	Email Contacts entered by the requestor and approver.
Rejected by PAC	PAC has reviewed and rejected the request.	Email Contacts entered by the requestor and approver.

* The initial Email Contacts may be manually updated by a department or school/unit approver when applying their Approval or Rejection, allowing more control over who receives the Approval or Rejection message.