Quick Start Guide: OnBase Reconciliation Approval Tracking - Reviewer Role Pilot Program

1. **Login to OnBase:**
   a. If a link is provided in an e-mail notification click on the link provided in the email or go to this address: https://onbase.louisville.edu/onbase/Login.aspx (do not use Edge browser)
   b. Login to OnBase using your University User ID and password.

2. **Review Queue Navigation:**
   a. If you do not use the link provided in the e-mail, the workflow can be found by clicking on the Main Menu bar and selecting Workflow>Open Workflow.
   b. To view all speedtypes that need to be reviewed click the triangle shaped button to the left of FI-SPDRECON – Speedtype Reconciliation.
   c. Make sure that in the workflow Life Cycle View is selected.
   d. The number of speedtype reconciliations in the queues will be noted by the number to the right of the queue name.
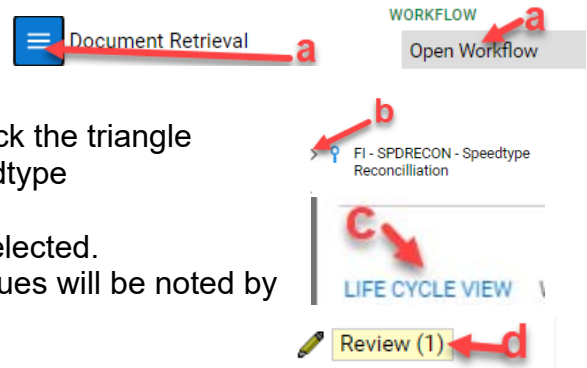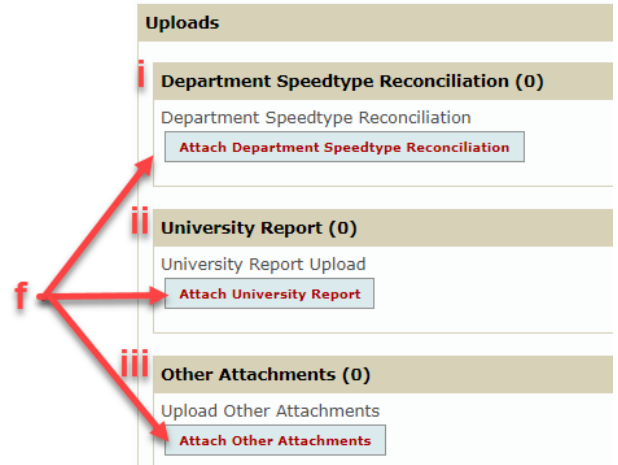
3. **Review the Speedtype Reconciliation:**
   a. The first time that the workflow is accessed an adjustment may need to occur. If the Monthly Speedtype Reconciliation Form is not visible under the Task Buttons click on the gray bar directly under the Task Buttons. Hover over the bar until it turns yellow and the mouse becomes an up and down arrow, hold the left mouse button down and drag the Monthly Speedtype Reconciliation Form up.
   b. General Information: form number (auto-assigned number from OnBase), fiscal year and month that the reconciliation is for.
   c. Speedtype Department Information: contains the speedtype, speedtype name, VP Dean Code, department number and department name.
   d. Comment Section – Each security role in OnBase has an area where comments can be placed. Comments are mandatory if Reviewers/Approvers click "Does Not Pass Review", "Approved with Changes Requested" or "Not Approved". "Save Changes", located directly under the Comment Section, must be clicked if a comment is added.
   e. Upload Section – Click the blue link to review the attached documentation. If the document is a Microsoft document (Word, Excel etc...) a pop-up box will appear. The document will download at the bottom of the pop-up box.
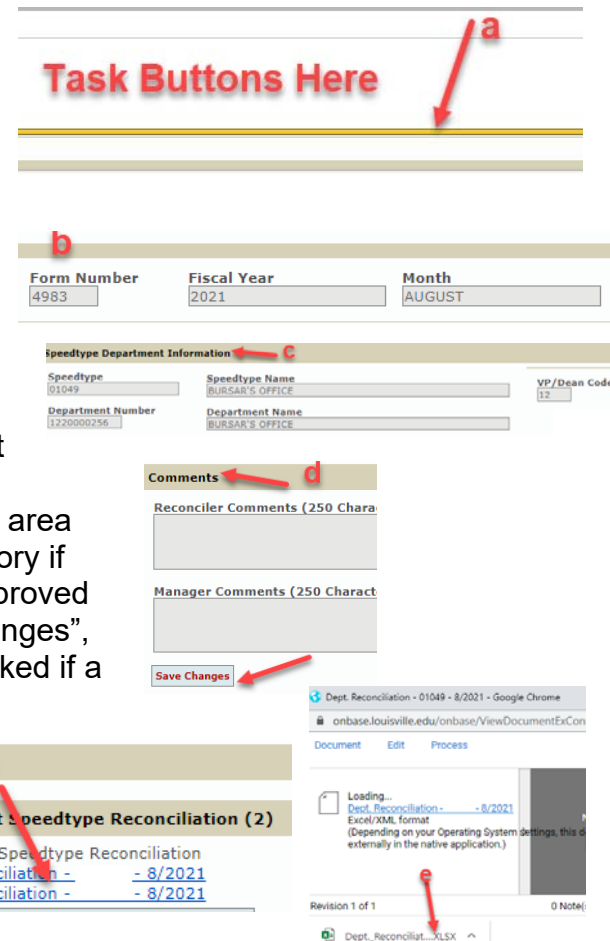
f. Attachments can be added by all roles in the process. To attach a document find the section that the document should go under, click the "Attach" button. A browse menu will pop-up. Locate the document that needs to be attached. Double-click the document and it will appear under the Attachment Section, click "Save Changes". OnBase will rename the attachment automatically. After the "Save Changes" button has been clicked the document can no longer be removed.

i. Department Speedtype Reconciliation – attach the speedtype reconciliation for the month. **If more than one is attached view the last (bottom) reconciliation.**

ii. University Report – attach the university report(s). This attachment area is optional because some areas attach university reports with their reconciliation document.

iii. Other Attachments – attach any additional documentation that is required for others to review and/or approve the reconciliation. This attachment area is optional and should include documentation that will help in the review/approval process.

g. Actions Section – Tracks all reconciliation, review and approval actions with name dates and times.

h. User Section – Allows users to see who is assigned to each speedtype and the roles that they are assigned to. This helps Departmental Approvers know if they are the last Approver or if the reconciliation needs to be approved by other Departmental Approvers.

4. Review Queue:

a. *Purpose* – Reviewers will review the reconciliation prior to the reconciliation going to an approver. This role is optional.

b. *Task Buttons* – Upon review of the reconciliation the Reviewer can click "Pass Review Send to Next Queue" or "Does Not Pass Review Send Back to Reconciler".

c. *Workflow* – "Pass Review Send to Next Queue" reconciliation form workflows to the next approver in the security file. "Does Not Pass Review Send Back to Reconciler" speedtype reconciliation form workflows back to the Reconciler for revisions. Once the Reconciler makes revisions the form will workflow back to the Review queue for review and approval. This will continue until the Reviewer clicks "Pass Review Send to Next Queue".

d. *Communication* – If "Pass Review Send to Next Queue" is selected an e-mail notification will be sent to the next person in the approval path. If "Does Not Pass Review Send Back to Reconciler" is selected an e-mail notification will be sent to the Reconciler letting them know revisions are needed. Once revisions are made an e-mail notification will be sent to the Reviewer notifying them that the reconciliation has been revised and is ready to review.