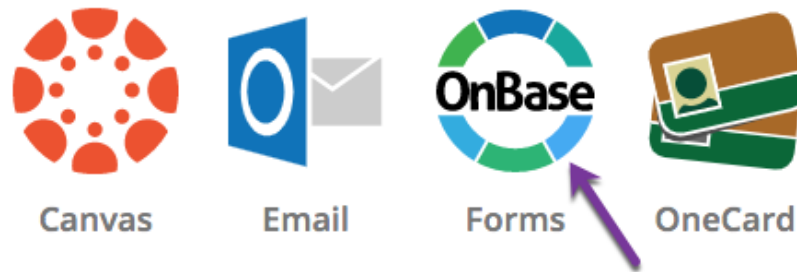


Faculty Release Time Request OnBase Form and Workflow User Guide for Dean's Office Staff

1. The form is available on the My Sac State portal. On My Sac State, it will be under **OnBase Forms**. In most colleges, department staff will submit forms for faculty members and Dean's Office staff will perform quality control review of the submissions.



2. Please remember not to instruct your departments to initiate the form until the current year benefits rates have been added to the form, which typically happens in early August OR once you receive notification from Academic Affairs.
3. Instructions for how to complete each field on the form can be found on the Instructions tab of the form.
4. OnBase does not allow you to save a form in progress and return to finish it later so please ensure you have allowed sufficient time to complete the form in its entirety.
5. The Submitter will fill out the form and click **Submit** at the bottom. If any of the required fields are not filled out, the form will not submit. The Submitter should check the entire form to see what was missed and then click **Submit** again.
6. Workflow
 - a. Faculty
 - b. Department Chair
 - c. Dean's Office Staff
 - d. Dean
 - e. Provost Office Staff
 - f. Vice Provost
 - g. Institutional Research, Effectiveness, & Planning
 - h. Budget Office
 - i. Next stop varies depending on funding source
7. The faculty member will not be able to correct the form but they can send it back to the Submitter for corrections.

8. Every Dean's Office staff will have OnBase Unity Client installed on their computer. They can log-in using their SacState credentials.

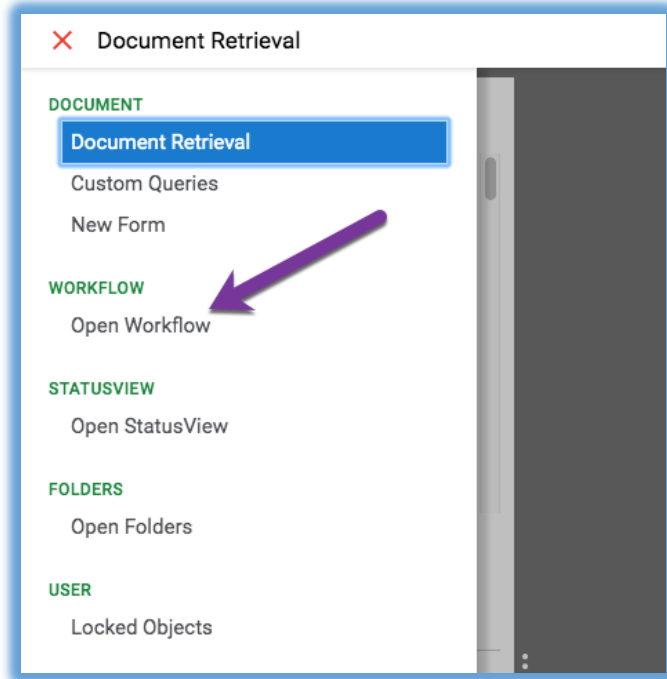
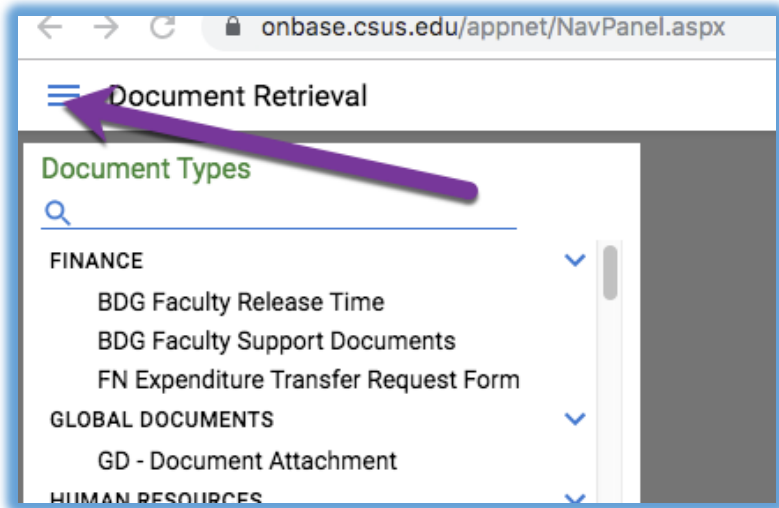


9. When the Dean's Office staff signs into OnBase Unity Client, they are going to see their Queue with all the forms that are waiting their review:

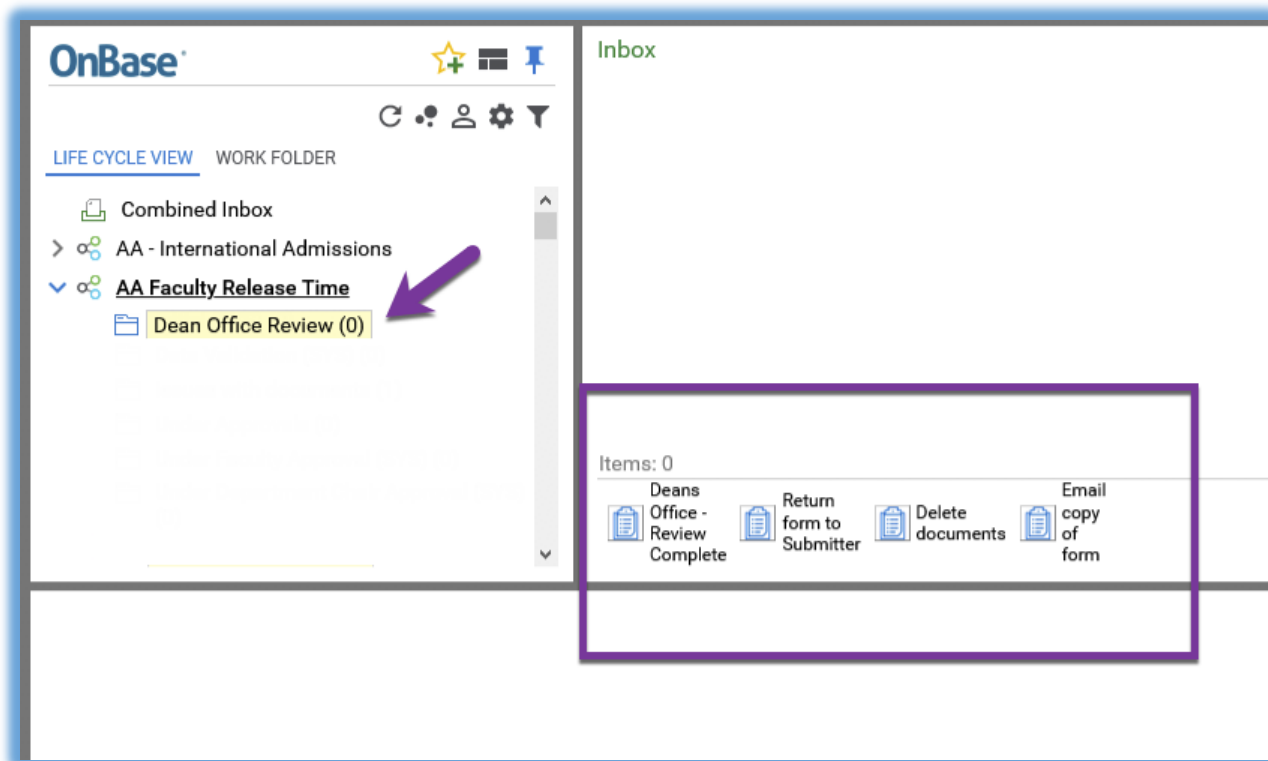
A screenshot of the OnBase Unity Client interface. The top menu bar includes File, Home, Workflow, and Document. The left sidebar shows a tree view with categories like Life Cycles, Search, and APPROVAL. The main content area displays a table of items in the 'Dean Office Review' queue. One item is highlighted, and a purple arrow points to it with the text 'This is Dean's analyst's queue'. Another purple arrow points to a link 'Click to see the form'. Below the table, a form titled 'Faculty Release Time Request Form for AUGUST DAPKEWICZ, RACHEL submitted on 9/17/2018' is shown. The form includes the Sacramento State logo and a header with tabs: Faculty Release Time Request, Budget Office, Activity Codes, NACUBO-FIRMS Codes, and INSTRUCTIONS. The form content includes a warning 'Faculty Release Time - Prototype Does Not Contain Full Functionality.' and an 'Employee Information' section with fields for Employee ID, Last Name, First Name, Middle Name, Department ID, Department Name, College/Program Name, Division Name, Job Code, Bargaining Units, Salary, and Semester Salary. A purple arrow points to the form with the text 'Scroll down to review the entire form'.

10. They can also access their processing queue on OnBase Web Client. They need to sign into <https://onbase.csus.edu/>, click on the little "hamburger" button on the top left, and then click Open Workflow.

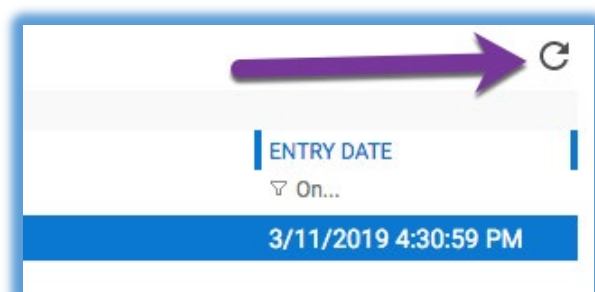
For processing/approvals of the Release Time Request, please use Firefox. If you need to use Chrome, you might need to clear cache (see instructions attached). Safari 12+ is NOT compatible with OnBase.



11. The view in the Web Client will be slightly different:



12. When done processing the form, click REFRESH button so the form moves forward.



When using web Client, please close your OnBase browser after you complete reviewing the form(s) to prevent them from getting locked.

13. The Dean's Office staff will need to open the form and scroll down to review. They will be able to make corrections and complete their review by clicking **Deans Office Review Complete** or **Return Form to Submitter**. They will be able to add a note – see the screenshot below:

OnBase (OnBase_Test)

File Home Workflow Document

Change Layout Close This Layout Secondary Viewer Primary Viewer Refresh Apply Filter Auto Work Override Auto-feed Route Item Take Ownership Release Ownership Execute Script Task Deans Office - Review Complete Return form to Submitter

Life Cycles Search...

Combined Inbox AA Faculty Release Time Issues with document (0) Under Approvals (1) Dean Office Review (1) APPROVAL

User Interaction

Note Text:

From Dean's Office:

Please correct Units.

ABE|

OK

Add a Note

Click OK

If the form is completed correctly, click Review Complete

Click Return form to Submitter

Primary Viewer

Faculty Release Time Request Form for SAECHAO, A-BE submitted on 12/11/2018

SACRAMENTO STATE Redefine the Possible

Faculty Release Time Request Budget Office Activity Codes NACUBO-FIRMS Codes INSTRUCTIONS

Faculty Release Time - Prototype Does Not Contain Full Functionality.

Employee Information

EmpID *	Last Name	First Name	Middle Name
Department ID	Department Name	College/Program Name	Division Name
Job Code	Bargaining Units	Salary	Semester Salary *

14. If the Dean's Office staff cannot make corrections themselves, they will send the form back with the note asking for corrections (not encouraged). The Submitter will see the note and correct.
15. After corrections are made by the form Submitter, the form will go through the Faculty and Chair's approval once again and will come back to the Dean's Office staff.
16. When the form routes to the Faculty member, Department Chair and the Dean, they all will have the same view of the workflow in OnBase but will have to approve their own section of the form. Faculty can only approve forms or return them to the submitter for corrections but Department Chairs and Deans can Approve, Deny, or Return to Submitter. All of them can leave a comment. Please see the screenshot below:

Faculty Release Time Request Form for HOLL, SUSAN submitted on 10/18/2018 - Mozilla Firefox

https://onbase-test.csus.edu/appnet/Workflow/WorkflowMain.aspx

OnBase

Inbox

Drag a column header here to group by that column.

NAME

ENTRY DATE

Faculty Release Time Request Form for HOLL, SUSAN submitted on 10/18/2018

10/23/2018 9:10:13 AM

Items: 1

Faculty

First Name: SUSAN

Last Name: HOLL

Date: 10/19/2018

Approval Status: ☒ Approve ☐ Return to Submitter

Comment:

Department/Division Chair

First Name: BENJAMIN

Last Name: FELL

Date: 10/19/2018

Approval Status: ☒ Approve ☐ Denied ☐ Return to Submitter

Comment:

College Dean

First Name: LORENZO

Last Name: SMITH

Date: 10/19/2018

Approval Status: ☒ Approve ☐ Denied ☐ Return for Correction

Comment: Test

Submit button is at the very bottom of the form

17. When all approvers choose the option: Approve, Denied or Return, they will have to click the button **Submit** at the very bottom of the form and the **REFRESH** button so it leaves their Queue.
18. To retrieve a particular form or all forms from your department/college and see their status, go to the OnBase Web Client link from My Sac State. Click the three lines in the upper left hand corner and select Custom Queries. Choose AA Faculty Release Time Document type. You can look up a form for a particular faculty member or all of them in your department in the certain date range.

Query Types



✓ AA Faculty Release Time

CARS Requests Pending Dean/VP Approval
FN Expenditure Status Search

[SHOW INSTRUCTIONS](#)

.....

Document Date

_____ - _____ <

Search Type

[KEYWORDS](#)

EmplID =

Request # =

First Name =

Last Name =

Department Name =

College/Program Name =

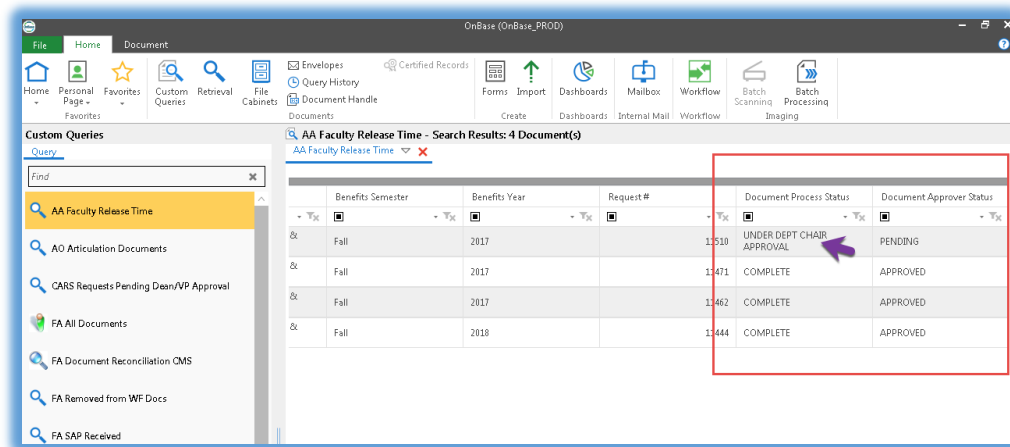
Benefits Semester =

Benefits Year =

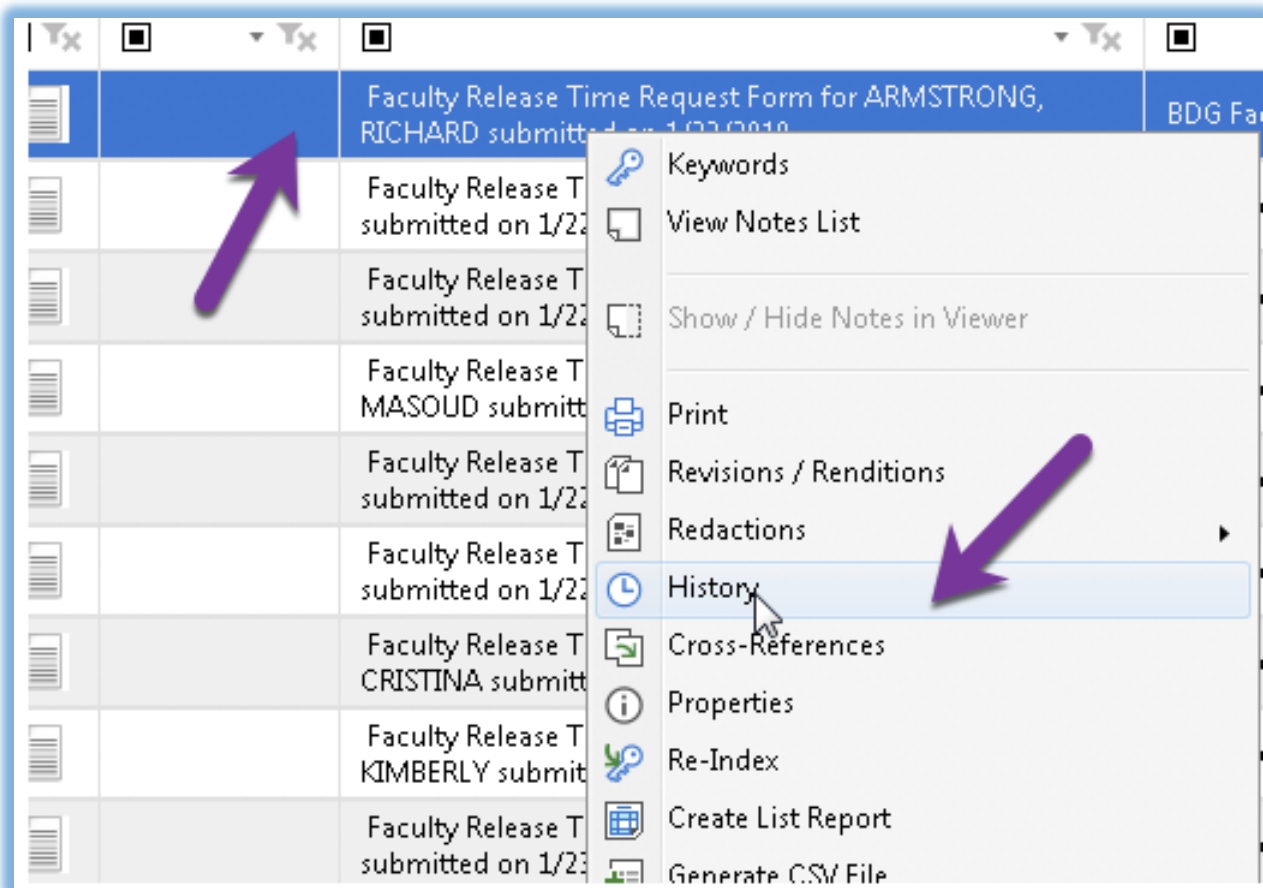


Search

19. When you need to know where the form is located, you can bring it up and see the status of it:



20. To look up the history of the form, right click on the file and choose History:



21. If you need to save the form on your desktop (it will save as image) you will have to email it to yourself or the faculty (if they need the copy):

- a. Open up custom query and search for the form you want to send.
- b. Once you have the form selected, click on tasks and then click "Email copy of Form"
- c. Or if you are done processing a particular form and want to send a copy of it, just click a button in your workflow view **Email Copy of a Form**

The screenshot shows a software interface with a top navigation bar containing 'File', 'Home', 'Document', and 'Tasks'. A red arrow points to the 'Tasks' tab. Below the navigation bar, a dropdown menu is open under 'Execute Task', showing options: 'Delete Faculty Release form', 'TEST Export', 'Approve on Behalf of Faculty', 'Email copy of form', and 'Configure Items...'. Another red arrow points to the 'Email copy of form' option. The main area displays search results for 'AA Faculty Release Time' with the heading 'AA Faculty Release Time - Search Results: 1 of 5 Document(s) Selected'. Below this is a table with columns: Icon, Document Type, EmplID, Last Name, and First Name. The table contains one row: 'BDG Faculty Release Time', '101064323', 'SAECHAO', and 'A-BE'. Below the table, a text prompt says 'Enter the email address you want to send the form to and click submit:'. Below this prompt is a window titled '[Workflow] User Interaction' with the heading 'Enter email address to send copy to.' and a text input field with the placeholder 'e.g. saclinkid@csus.edu:'. The window has 'Submit' and 'Cancel' buttons.

Icon	Document Type	EmplID	Last Name	First Name
	BDG Faculty Release Time	101064323	SAECHAO	A-BE

Enter the email address you want to send the form to and click submit:

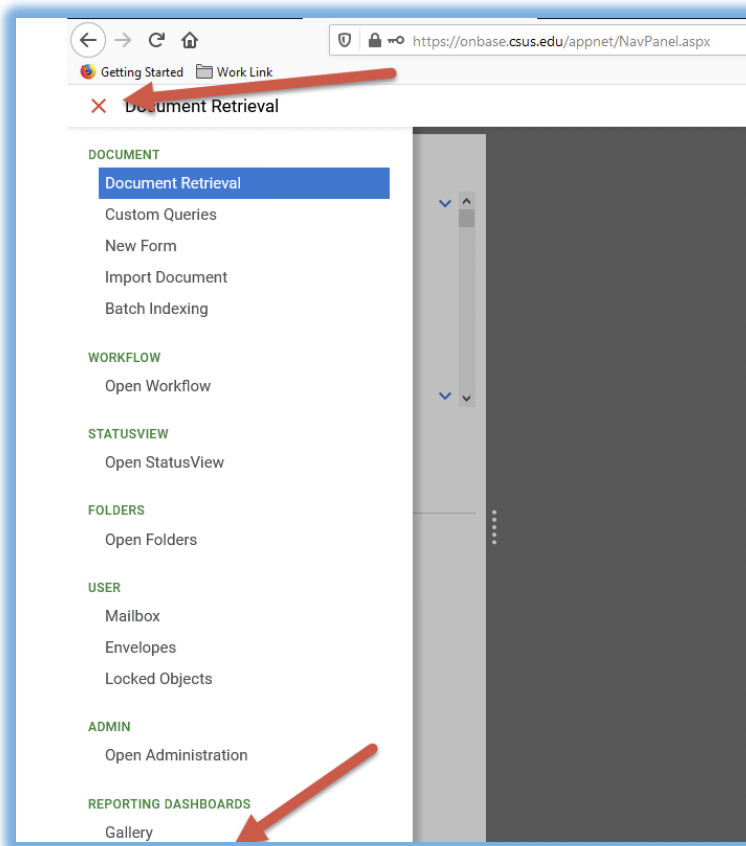
[Workflow] User Interaction

Enter email address to send copy to.

e.g. saclinkid@csus.edu:

22. In order to access reports - There are 2 types of faculty release reports:
- "RPT – Faculty Release Time" is an exportable Excel report.
 - "RPT – Faculty Release Time Workflow Overview" is a report to show an overview of where all the forms are in the workflow process.

In Web Client, click the top left corner "hamburger" icon and click Gallery

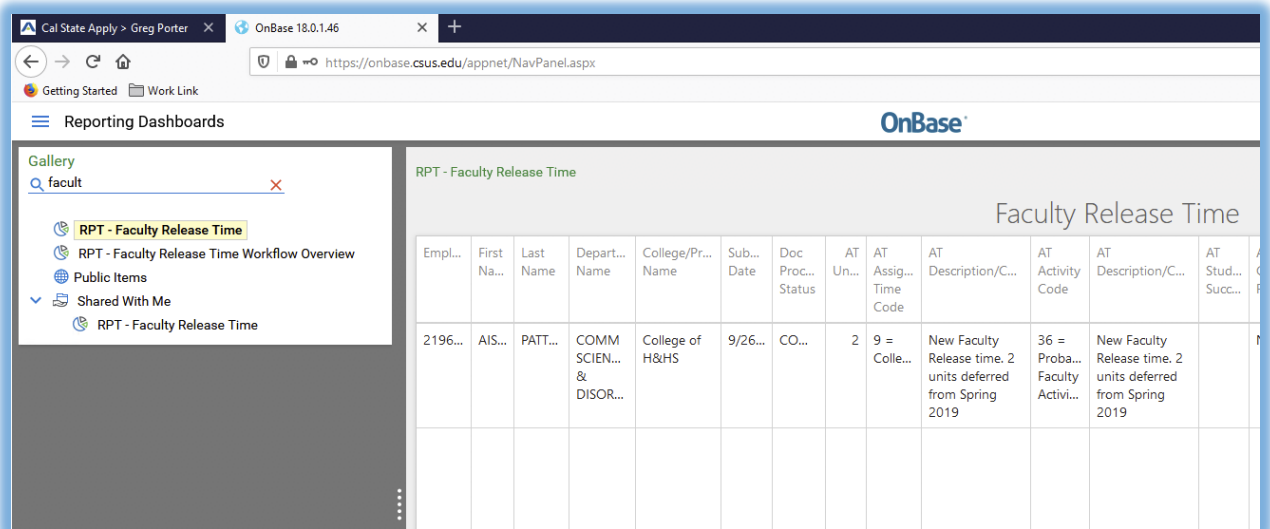
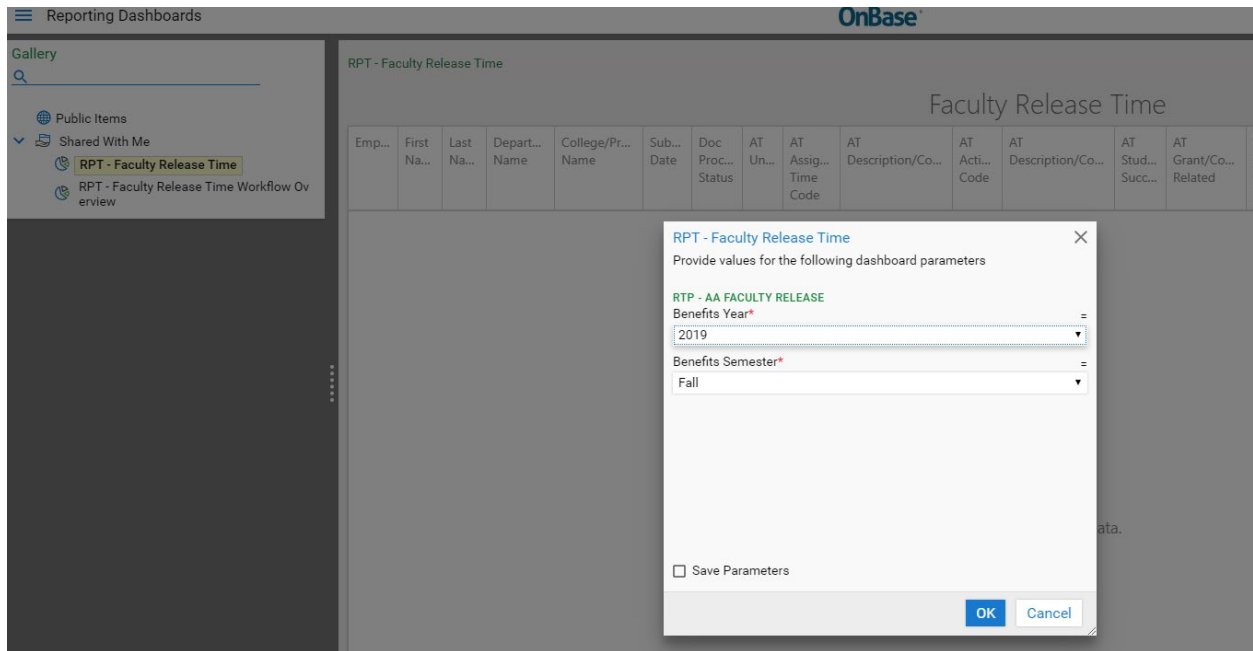


Click on Shared with Me

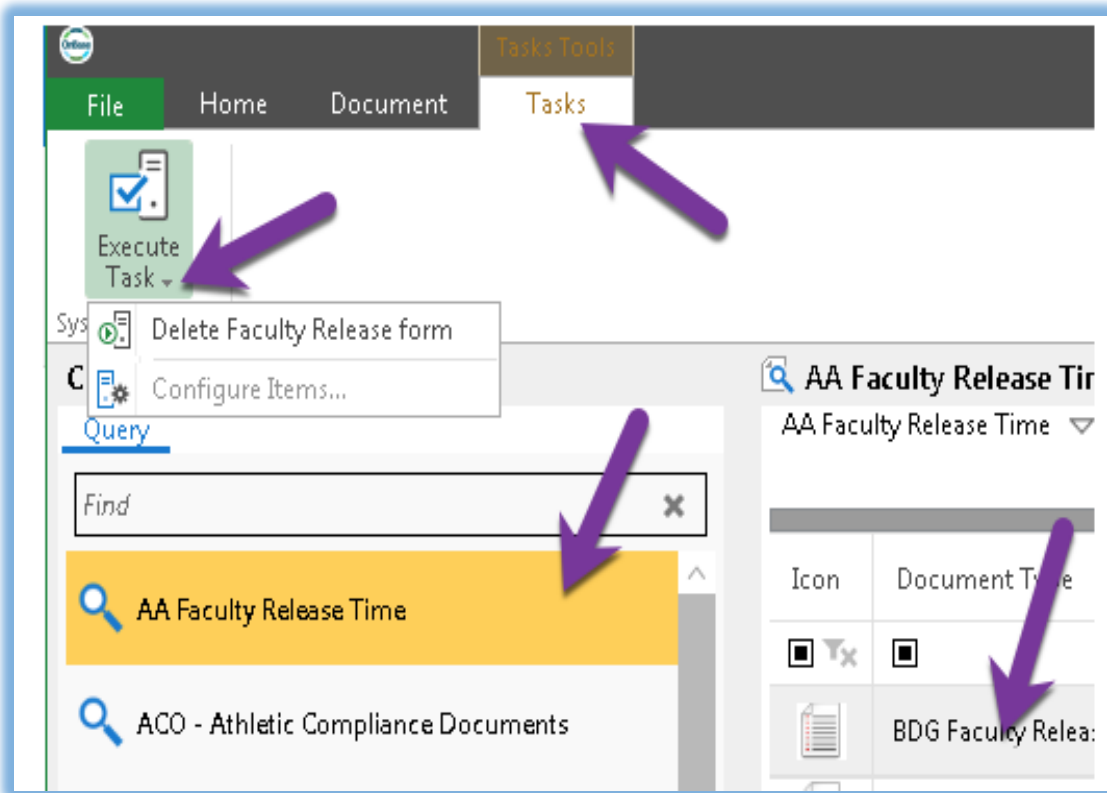
Click on RPT – Faculty Release Time OR Click on RPT – Faculty Release Time Workflow Overview

Enter Benefits Year and Benefits Semester you wish to retrieve and then click OK

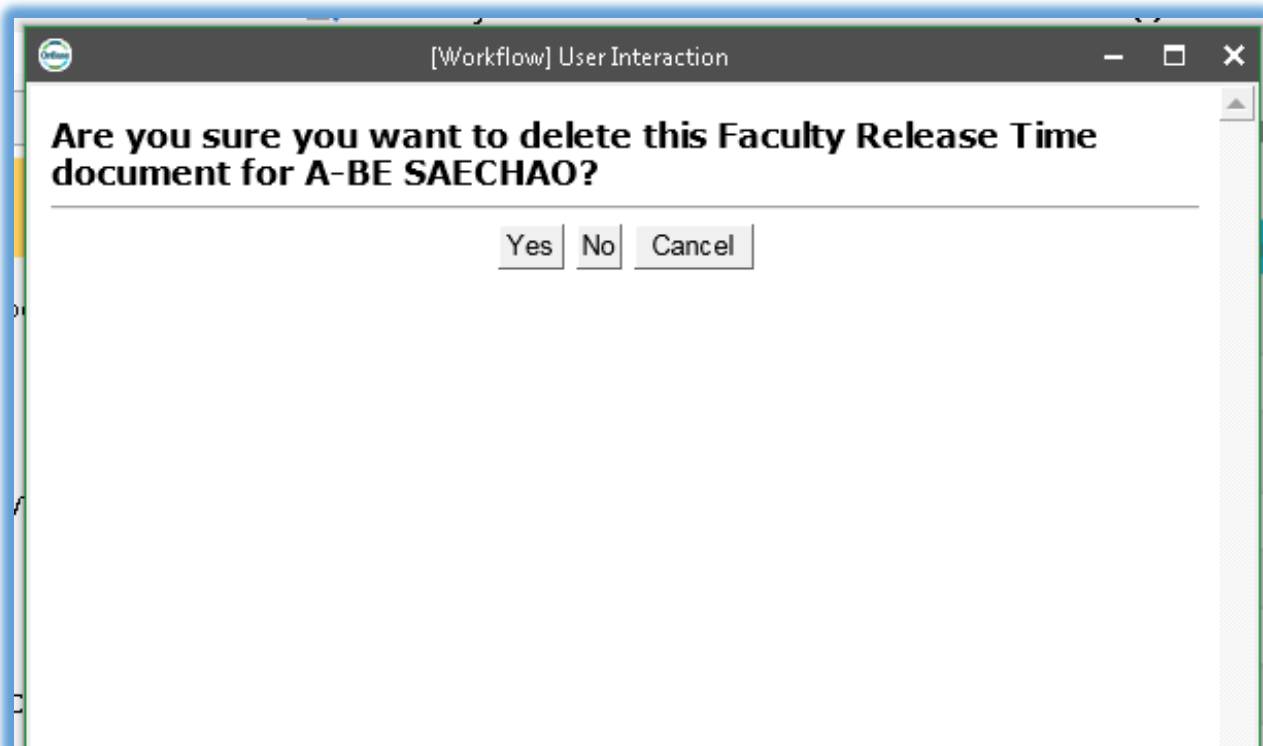
Both reports will display information for all forms in the given parameters you provided



23. All Dean's Office staff and Vice Provost's office will be able to delete the form anywhere in the workflow. To do that, go to Custom Query and search for the form that needs to be deleted. Click on the form to highlight it (see the screen shot below)



24. Click on **Tasks** and then **Execute Task** – you will see the drop down Delete Faculty Release Form. Click Delete. It will give you this prompt:



25. Click YES and form will be deleted.

26. Please note that the list of Dean's Office staff is maintained manually so if there are any changes in your colleges and there are new employees coming in – please let IRT know so we can update the list of Dean's office staff performing quality control. Please submit a service ticket through IRT website: <https://csus.service-now.com/service/?id=help>

For other questions, please refer to the materials listed below or contact Academic Affairs:

- Instructions tab of the Faculty Release Time Request form in OnBase
- Clear Cache Instructions
- Faculty Release Time Use Guide for Faculty
- Faculty Release Time Use Guide for Chairs
- Faculty Release Time Use Guide for Deans