

S – OUC – Fiscal Year End OnBase Solution Documentation for All Users

WorkView User Guide - March 15, 2024

Table of Contents

- 1 OnBase Overview..... 3
 - 1.1 Accessing OnBase..... 3
- 2 WorkView..... 3
 - 2.1 WorkView Terminology..... 3
 - 2.2 Navigating to WorkView..... 4
 - 2.2.1 Unity Client..... 4
 - 2.2.2 Web Client..... 4
 - 2.2.3 In either client..... 5
 - 2.3 Terminology Used in this Application 6
 - 2.4 Filter Bars and Filters for this Application..... 7
 - 2.4.1 FYE Tasks..... 7
 - 2.4.2 FYE Dates..... 8
 - 2.5 FYE Application Usage (All Users)..... 8
 - 2.5.1 Using Calendars 8
 - 2.5.2 Using Search Filters..... 10
 - 2.5.3 Completing Tasks 11
- 3 Workflow Processing..... 13
 - 3.1 Reminder Notification 13

1 OnBase Overview

OnBase® is enterprise document management software that combines document management, imaging, Workflow, reporting and case management functionality in a single application.

More information about OnBase at CU is available on the [Enterprise Content Services homepage](#). Resources and Training guides are available on the [Training page](#).

If you have questions or need assistance, please contact the appropriate [departmental administrator](#) or the [UIS team](#).

1.1 Accessing OnBase

OnBase is available through either the Unity client (desktop application for Windows only) or a browser-based web client. All clients and environments are available using the links in the [OnBase Web URLs and Unity Client ClickOnce URLs](#) guide.

To install the Unity client, open the clickonce URL in [Edge](#) and click Install when prompted. No administrator privileges are needed.

Even if you have access to and regularly use OnBase, we have separate non-production environments for development and testing. While you'll use production (DMOPRD) for actual work, testing of a new process may occur in DMOTST or DMOSTG.

Regardless of client and environment, you'll use your regular campus credentials to log in through SSO. The OnBase clients all require VPN connection unless you are on a campus network already.

2 WorkView

WorkView is an OnBase module that enables rapid development of applications suited for case management. WorkView is primarily data-centric rather than document-centric but can also incorporate content stored in OnBase document types.

WorkView can also be used to store values in tables which can then be used to perform automated workflow processing/routing. Users with the necessary access level can then easily manage these values themselves without needing experience in OnBase administration, reducing additional development and maintenance over time.

For the best experience in WorkView, it is recommended to use the desktop Unity client. Most functionality is available in the web client if needed.

NOTE: Multiple users can concurrently view and even modify a WorkView object. Only the more recently saved change will be respected in that case.

2.1 WorkView Terminology

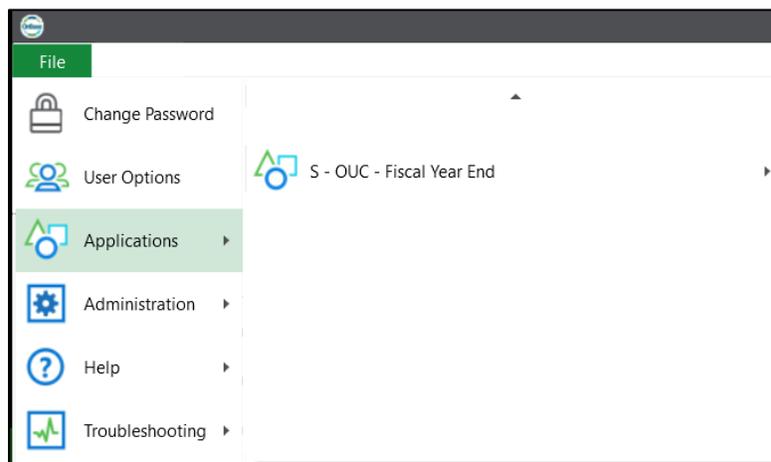
- **Application** - a solution built in WorkView for a certain purpose which consists of classes, filter bars, etc.

- **Class** - a type of WorkView object (ex. Task Definition, Task, Role, etc.). Classes have attributes (which have values, similar to keyword types on a document type), filters and views. Classes can also have relationships to each other.
- **Object** - an instance of a record in a class. Each object has attribute values.
- **View** - a defined layout to display an object's attribute values. When you open an object, it may have more than one view. They will appear as tabs across the top of the window.
- **Filter** - a query for objects that meet predefined or user-entered criteria. Filters can also be embedded in a view to show related objects. Certain filters can also be viewed in a calendar format.
- **Filter Bar** - a collection of filters

2.2 Navigating to WorkView

2.2.1 Unity Client

In the Unity client, go to the File menu and choose Applications. Then select **S - OUC - Fiscal Year End** from the list.

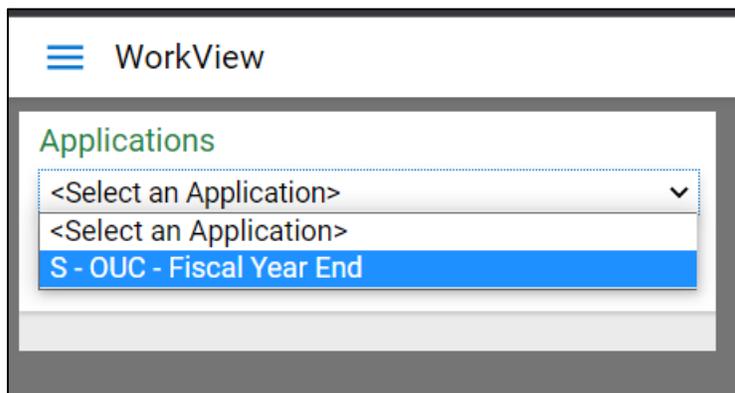
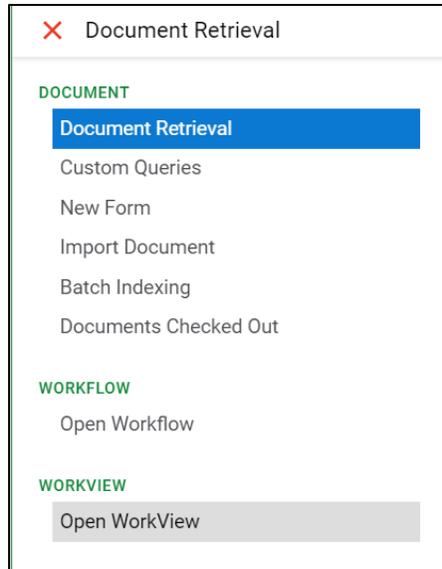


For more information, an overview of WorkView usage is available in Section 6 of [End User Essentials: OnBase Foundation Unity Client part 8](#) (6 minutes).

There are a variety of additional features available, such as the “Enable Always On” option that will keep a tab for the application active in the menu ribbon, to make it easier to return to an application you use often. Filters and objects can be added to your personal page, and filter settings can be customized.

2.2.2 Web Client

In the web client, choose WorkView from the navigation menu (button with three lines in upper left corner). Then find **S - OUC - Fiscal Year End** in the list.



For more information, an overview of WorkView usage in the web client is available in [End User Essentials: OnBase Foundation Web Client \(part 6\)](#) (4 minutes).

2.2.3 In either client

The default filter (**My Teams' Tasks**) will be displayed. Additional filters will be in a list to the left. Expand the filter bars to see the filters in each group.

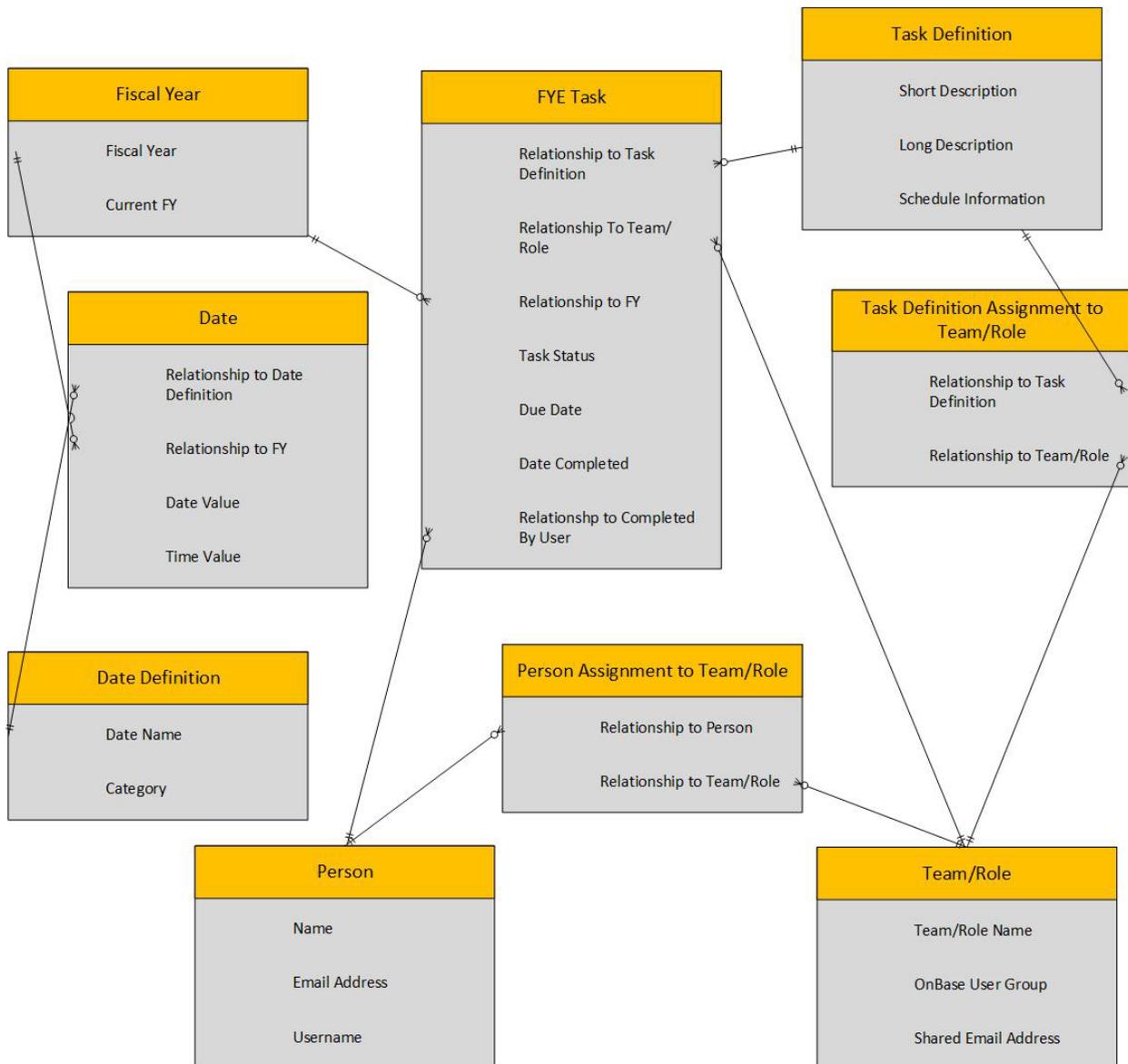
When viewing filter results, double click to open an object.

The following keyboard shortcuts are available when an object is open:

Shortcut	Action
CTRL + E	Save and Close
CTRL + S	Save
CTRL +]	Move to the next view (to the right)
CTRL + [Move to the view to the left

2.3 Terminology Used in this Application

- **Fiscal Year** - a record is created in the Fiscal Year class for each fiscal year being processed. All tasks relate to a FY.
- **Task Definition** - a type of task that is performed each fiscal year. These definitions are re-used each year. Modifying a task definition affects all tasks that reference that task definition. Admins can create new task definitions or modify existing task definitions.
- **Task** - a specific instance of a task definition for a certain fiscal year. Each Task is assigned to a team/role.
- **Date Definition** – types of dates relevant to FYE processing, such as holidays, milestones, etc.
- **Date** – a specific instance of a date definition, related to a specific FY.
- **Team/Role** – teams of users responsible for certain tasks
- **Task Definition Assignment to Role** – these records represent an assignment of a task definition/type to a Team/Role
- **Person** – a person involved in FYE processing
- **Person Assignment to Role** – these records represent an assignment of a user to a Team/Role. This is managed through membership in the OnBase user group that corresponds to the Team/Role but is visible in the application for ease of use.



2.4 Filter Bars and Filters for this Application

Once the application is open, a list of filter bars will appear on the left. Within each filter bar, there will be a list of filters. Click the filter bar to expand it and see the filters inside.

Each filter will have a combination of pre-defined criteria or user prompts to search for objects.

Double clicking the row/record in the filter results will open that object. The type of object that will open depends on what type of object (class) the filter displays.

2.4.1 FYE Tasks

Contains filters pertaining to FYE Tasks.

Filter Name	Opens	Description
My Teams' Tasks	FYE Task	Tasks assigned to any of your teams for the current fiscal year. Can also be viewed on the calendar.
My Teams' Incomplete Upcoming Tasks	FYE Task	Tasks assigned to any of your teams for the current fiscal year, with a due date in the next 7 days and which are still Open. A reminder will be sent (to the shared address for the Team/Role and to all members of the Team/Role) for any items meeting these criteria.
All Upcoming Tasks for Current FY	FYE Task	All current FY tasks due in next 7 days
Search Tasks	FYE Task	Search for tasks meeting certain criteria
All Tasks for Current FY	FYE Task	All tasks for the current FY

2.4.2 FYE Dates

Filters pertaining to fiscal years and milestone dates.

Filter Name	Opens	Description
All Fiscal Years	Fiscal Year	Fiscal Year objects. Admins can create new FY records from here.
All Dates for Current FY	Date	All Dates for the current FY. Can also be viewed on the calendar.

2.5 FYE Application Usage (All Users)

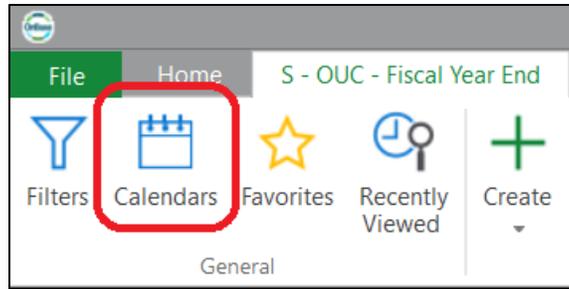
2.5.1 Using Calendars

Certain filters can also be viewed in a calendar format. These include:

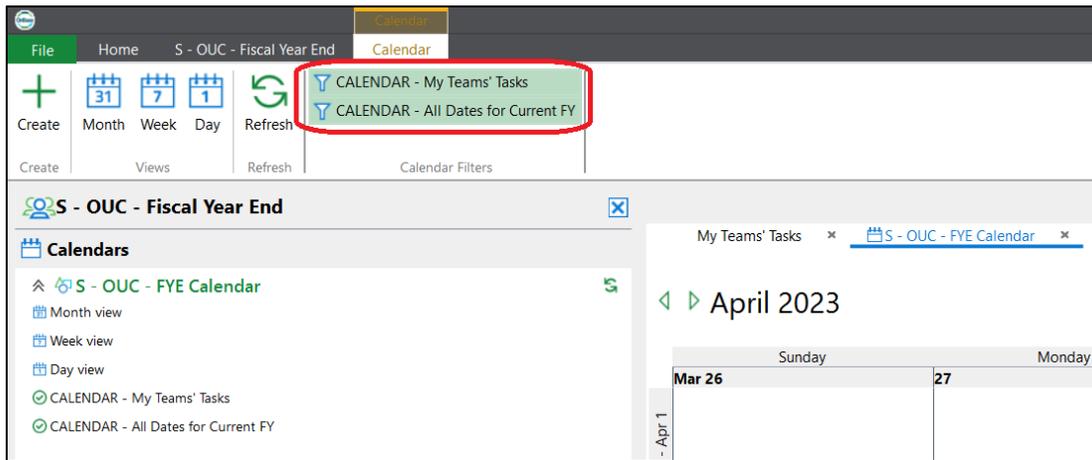
- My Teams' Tasks
- All Dates for Current FY
- All Tasks for Current FY (admins only)

2.5.1.1 Using Calendars in the Unity client

Once in the FYE application, use the application tab to select Calendars.

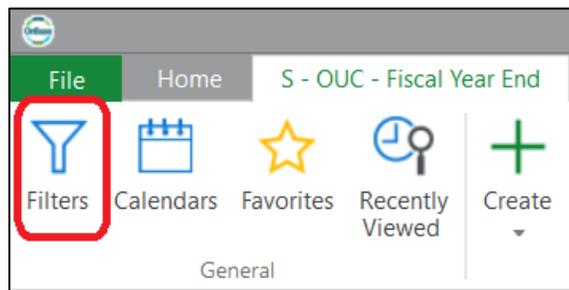


You can then choose between day/week/month view and turn filters on/off from the Calendar menu tab.



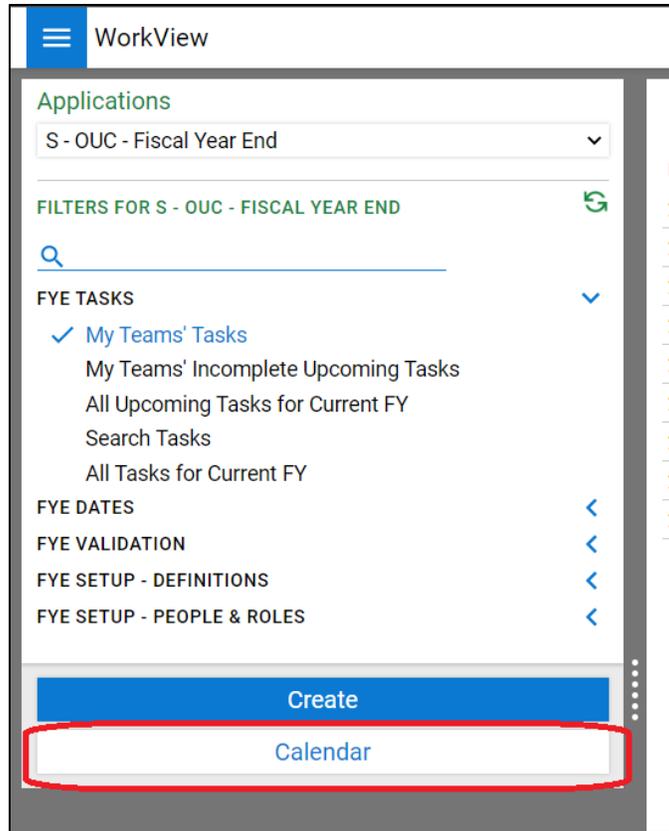
Just like in a regular filter, objects can be opened by double clicking.

To go back to the regular filter view, use the Filters button on the application tab.



2.5.1.2 Using Calendars in the web client

Once in the FYE application, use the Calendar button to open the calendar view.



You can then choose between day/week/month view and turn filters on/off using the options in the upper right corner.



Currently objects can only be opened from calendars in the Unity client.

To go back to the regular filter view, select a filter from the list at the left.

2.5.2 Using Search Filters

Search filters allow for criteria to be entered in order to find the desired objects, rather than (or in addition to) pre-defined criteria for the filter. Enter your values and use the Search button at the bottom.

To perform a wildcard search, use *.

If you'd like to use multiple values for your search, click the name of the field and another field will be added. You can then click where it says "or" to change that to "and" or a range if needed.

Search Tasks x

Constraints

Fiscal Year = 2023 ✓

Assigned To = OUC Finance Team ✓

Or

Assigned To = OUC AcctServ ✓

Assigned To Category = [Empty] ⊖

Description (use * for wildcard search) = [Empty] ⊖

Due Date (Date Format) = [Empty] ⊖

The operator can be changed as well, from the default “=”. Instead, this can be less than, less than or equal to, greater than, etc. Click the symbol until the one you want appears.

Due Date (Date Format) >= 4/1/2023 ✓

Task Status =

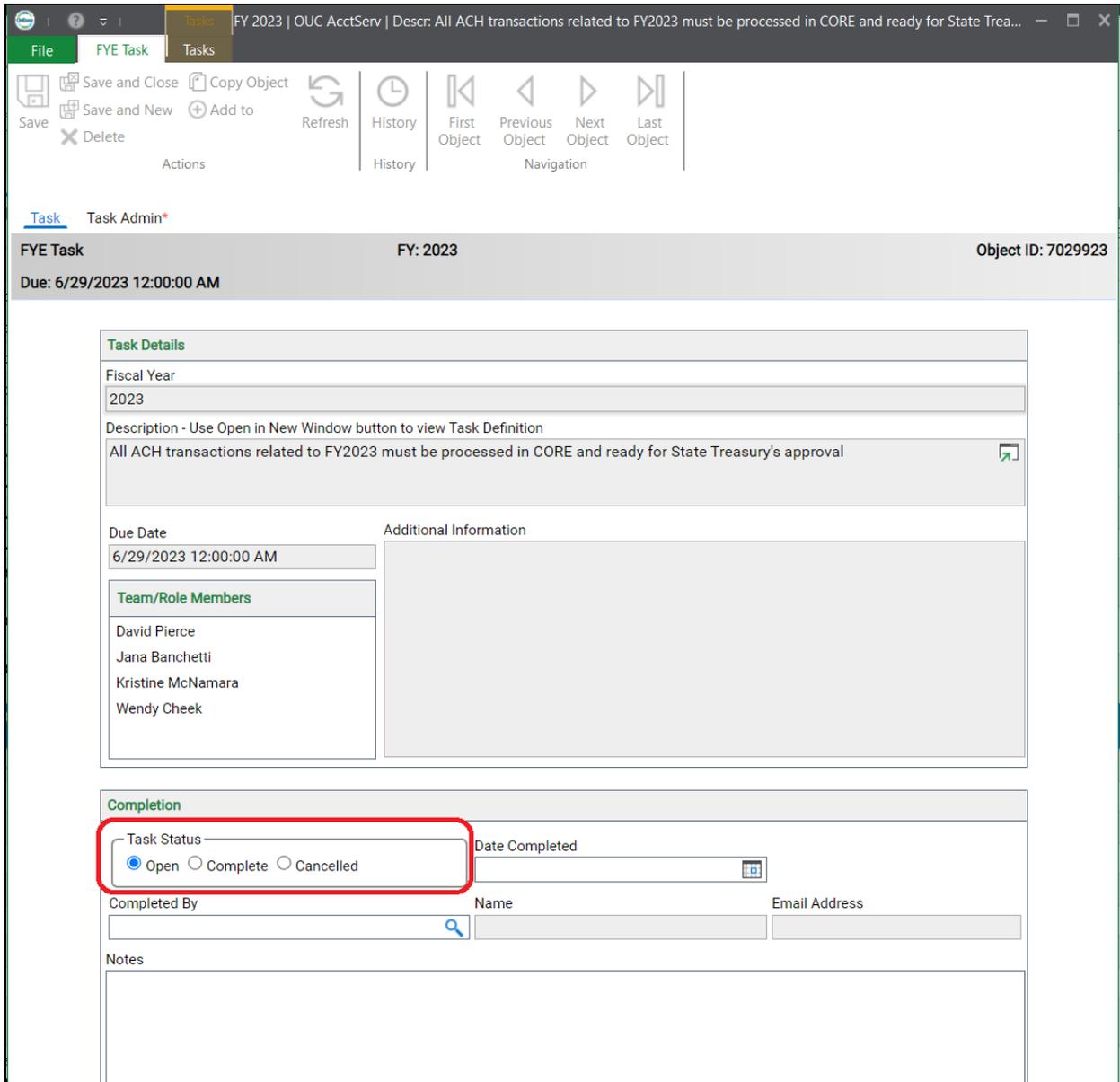
2.5.3 Completing Tasks

Completion of work or acknowledgement of a task can be indicated by marking the task complete.

To complete a task, open the checklist by double clicking the item in a filter or on a calendar (Unity client only).

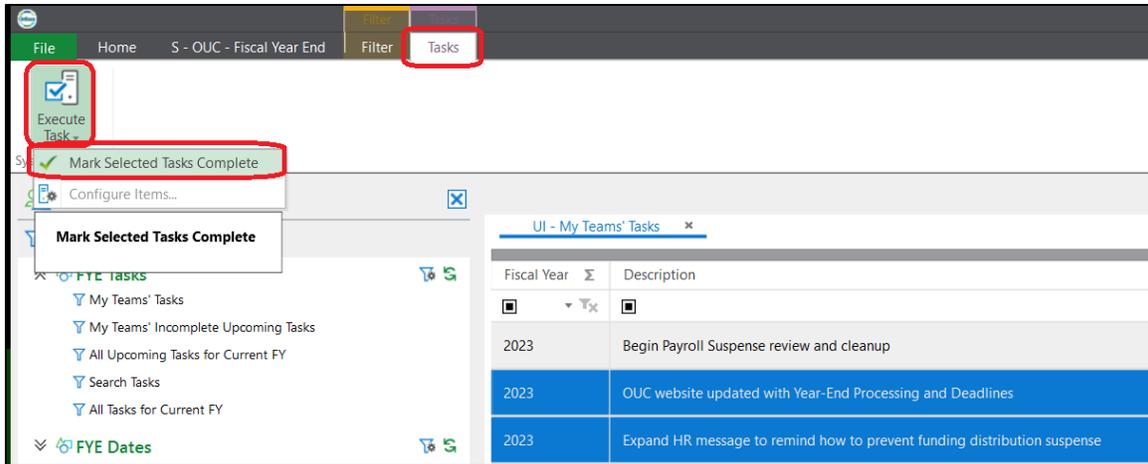
Information about the task will be at the top, followed by the completion section.

Choose Complete (or Cancelled, if applicable) as the status. Your username and the current date will be filled in automatically, but you can change these values if necessary. If you have any comments, they can be entered here as well. The comments will only be visible on this object.



When you are done, choose **Save** or **Save and Close** from the menu.

Unity client only: From a filter, multiple tasks can be marked complete at the same time by selecting the desired tasks, then using the Mark Selected Tasks Complete option under System Tasks in the menu.



3 Workflow Processing

Workflow is another OnBase module that provides automated processing in support of the FYE solution. Users will not need to interact with this workflow, it runs in the background to process items, make updates based on changes to definitions and send reminders.

3.1 Reminder Notification

Reminders are sent 7 days in advance of any tasks that have not been marked completed.

From: do-not-reply@cu.edu

To: [shared address for team/role, plus email addresses for all team/role members]

Subject: Upcoming FYE Task Due Date – [Task Description]

Body:

You have an upcoming due date for a fiscal year end task that has not been marked complete.

Task Description: [Task Description]

Due Date: [Due Date]

Assigned To: [Role Name]

Open task

Web client: [URL]

See all upcoming incomplete tasks:

Web client: [URL]

If you have any questions about this deadline, please contact accounting@cu.edu.



University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus