COUNTY OF WESTCHESTER

ONBASE WORKFLOW MANUAL

FOR

VACANCY RELEASE FORMS

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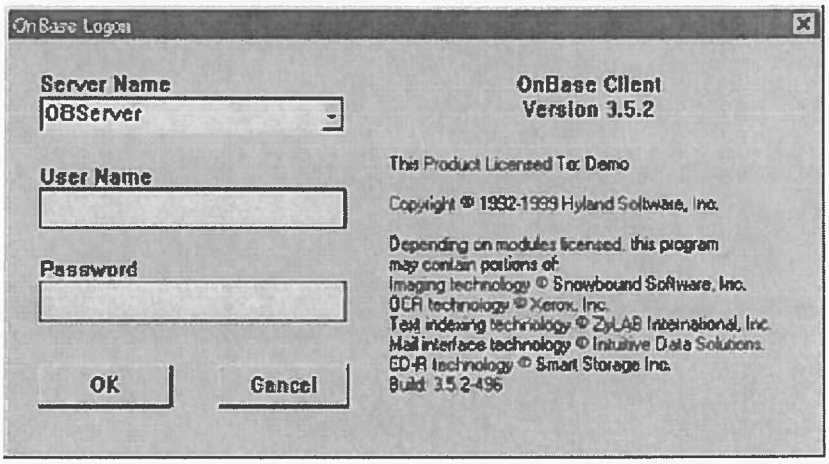
ACCESSING THE ONBASE WORKFLOW

Login To Workflow

To enter the OnBase Client, click on the OnBase icon. A screen like the following will appear:



Verify that the server name is OBServer then enter your User Name and Password and click on the OK button. Initially, enter your County user ID in <u>both</u> the User Name and Password fields.

You will then see a progress bar as the database loads. Subsequently, the OnBase Client will appear and the Document Retrieval dialog box will open. You will use this retrieval screen to search for documents after they have been filed into the system.

Changing The User Password

The first time you access the OnBase Client, your user name and password are defaulted to your County user ID. To change your password, click on **User Menu, Change Password**. The menu will allow you to type in your old password and the new password. The new password will have to be entered a second time under "Verify New Password".

(<u>NOTE</u>: If the Task Bar is not displayed on the Onbase client screen, go to the 'Windows' option at the top of the screen, and click on 'Task Bar'.)

GENERAL INFORMATION REGARDING THE WORKFLOW

Glossary

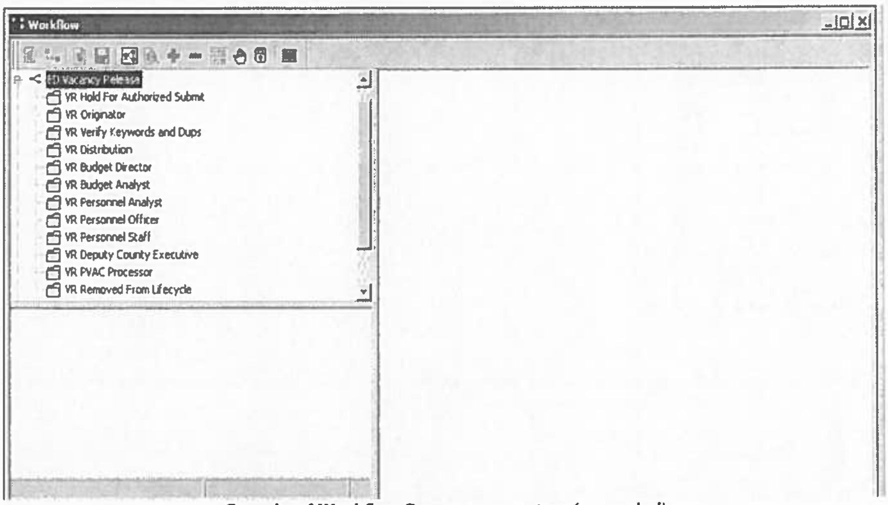
The following terminology is used throughout this manual:

Term	*Definition*
BA	Budget Analyst
BD	Budget Department
Dialog Box	A "pop-up" window that appears requesting further input on a specific area. For example, when printing, a Print Dialog box will appear requesting such information as Portrait or Landscape.
Eform	Electronic Form
Icon	A picture representation of a queue or action tool within the program.
ID	Identification – Unique number assigned to each VR
Life Cycle	The passage of a document through your normal business processing (i.e. From Originator to Hold For Authorized Submit is part of the VR life cycle).
PA	Personnel Analyst
VR	Vacancy Release
Queue	A Queue is a stop or state that a document can be in during the business process. The queue is the point at which work is performed on the document. This work will vary from one queue to another and depends on the state of the document at the time.
Workflow	A workflow module allows you to enhance your normal business process by allowing you to use the system not only to store documents but also to track the progress of those documents through your normal business process. This workflow module has been designed specifically for the County of Westchester's Vacancy Release Form

Workflow Menu

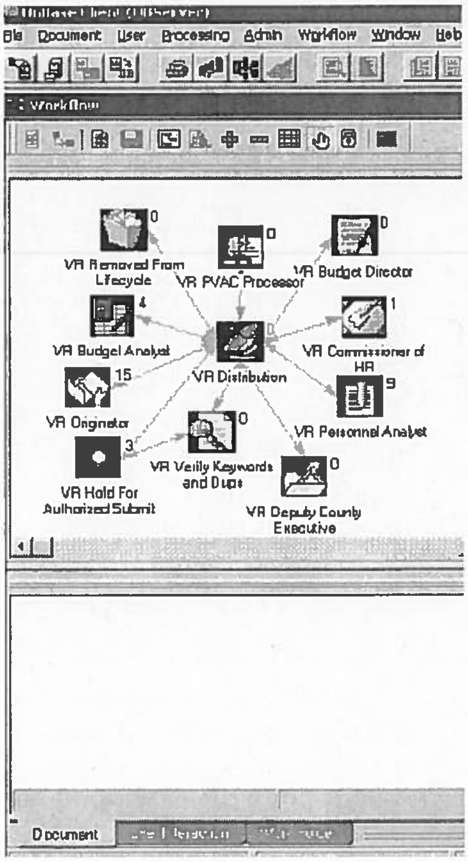
To access the Workflow, click on **User Menu** and select **Workflow Inbox** or click on the Workflow icon from the toolbar. The last Workflow screen you had open will appear, either in the text view format or the graphical view format.

If the **text view** appears, select the BD Vacancy Release and <u>double click</u> to expand the life cycle and list the queues.



Sample of Workflow Screen in text view (expanded)

If the **graphical view** appears, the only queues that will be enabled are those to which you have access. The remainder of the queues will be disabled. You can toggle between the text view and graphical view by choosing the view icon from the tool bar directly above the window.



← Toggle Gripper

← Toggle Gripper

← Tabbed Window

Sample of Workflow Screen in graphical view

In the example of the Workflow Screen *(graphical view)* shown above:

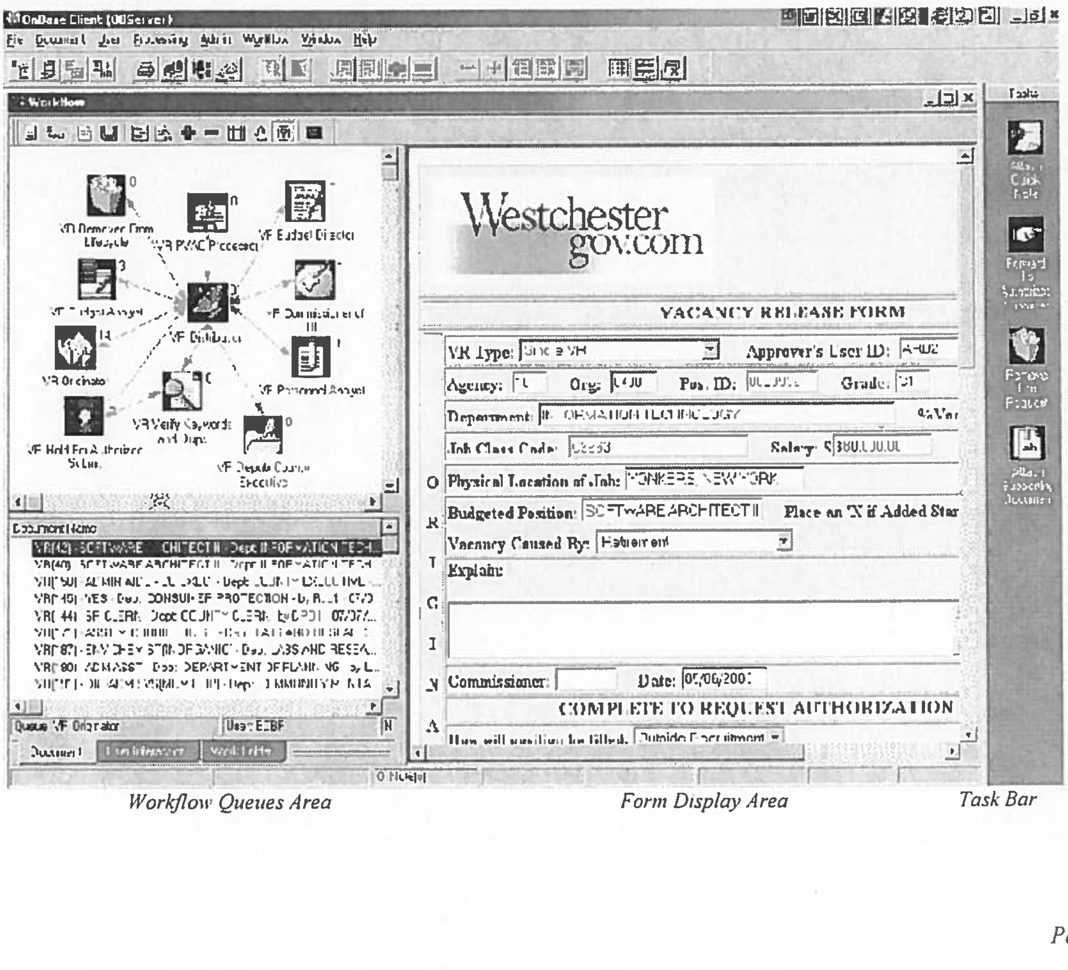
- The toolbar displays the action icons.

- The middle portion displays the various "queues" within the approval cycle. The number that appears in the upper right corner of each queue icon represents the number of documents currently in that queue. It is no longer necessary to call Human Resources or Budget to determine the status of your request. You may now look at the request under each specific queue.

- The lower section displays the current queue *(in the graphical view sample, the queue is VR Budget Analyst).* Documents for that queue are displayed under the **Document** tab. To work with a specific document, click on the document – the document will displayed on the right side of the screen *(see screen sample below).* Once a document is selected, the **User Interaction** tab displays questions, messages or actions the user must respond to, and the **Work Folder** displays related attached documents.

- To the right of the graphical view will be a large area where forms will be displayed. To the right of the form display area will be a task bar area. The tasks available in this area will change depending on the current queue.

- The window layout is configurable using the grippers. You may want to reconfigure your window layout in order to change the sizes of the windows as they are displayed on the page. You can toggle the grippers on and off using the toggle gripper button . Simply drag windows on to each other and share their docking position to create a tabbed window like in the example below. You can lock or unlock windows at their current position by using the Lock Windows button. . Docked workflow windows can be undocked by double clicking the tab for the window you want to undock. The default configuration can be restored by right clicking the gripper and selecting Restore Default Display.



Workflow Queues Area *Form Display Area* *Task Bar*

Workflow Toolbar

Begin User Work	Initiates User Work on selected document(s)
Route Document	To route document. Possible transitions will be displayed.
Show Document	To show the document
Save	To save the document
View	Changes the view display of the workflow between text and graphical
Filter Inbox	Applies a filter to the Inbox
Zoom In	To zoom in the Workflow display
Zoom Out	To zoom out the Workflow display
Grid	To display a grid over the Workflow display
Toggle Grippers	Turns on/off the ability to adjust the position of the windows on the screen. (document, workfolder, user work, etc.) Docked workflow windows can be undocked by double clicking the tab for the window you want to undock. The default configuration can be restored by right clicking the gripper and selecting Restore Default Display.
Lock Windows	Ability to lock window sizes
Terminal Session	Starts a terminal emulation session for the ability to connect to an outside system. This feature is not being using in this application.

Workflow Queues

A queue is a stop or state that a document can be in during the business process. The queue is the point at which work is performed on the document. The work that is performed will vary from one queue to another and will depend on the state and queue that the document is in at the time. The arrangement of the queues and the transitions made between them determine the visual representation of the life cycle.

The Vacancy Release Form Workflow queues are:

- ***VR Originator***
  The Origination queue pertains to the department that creates the original documents for submission. Clerical staff will make any changes to the request and attach any additional supporting documentation requested by Budget or Human Resources.

- ***VR Distribution***
  The Distribution queue is the system hub where all forms will be distributed through the approval cycle. The Distribution queue is an automatic queue with no user interaction.

- ***VR Hold for Authorized Submit***
  Once the initial document is created, it will sit in this authorization queue for department managerial approval.

- ***VR Budget Analyst***
  Budget Analyst for that department reviews request.

- ***VR Budget Director***
  This is the second Budget Dept. queue. Budget Director reviews VR and processes it.

- ***VR Personnel Analyst***
  The first Personnel queue in the approval cycle.

- ***VR Commissioner of HR***
  The second Personnel queue in the approval cycle. The Commissioner of HR reviews and processes it.

- ***VR Deputy County Executive***
  Final approval queue for the VR request.

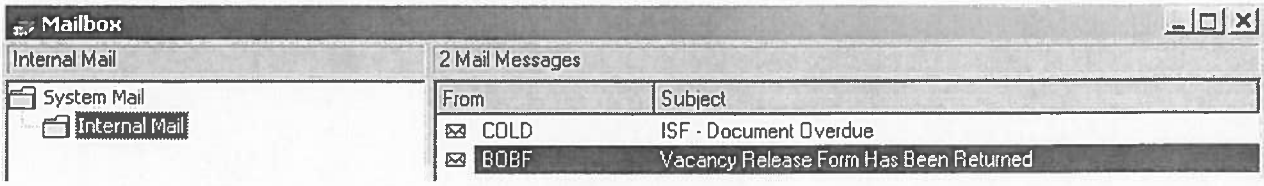
- ***VR PVAC Processor***
  PVAC Processor in Budget Office creates GHRS Transaction.

- ***VR Removed from Life Cycle***
  When requests are completed, they are sent to this queue for a two week time frame, in case a correction needs to be made prior to final commitment.

Workflow Mail

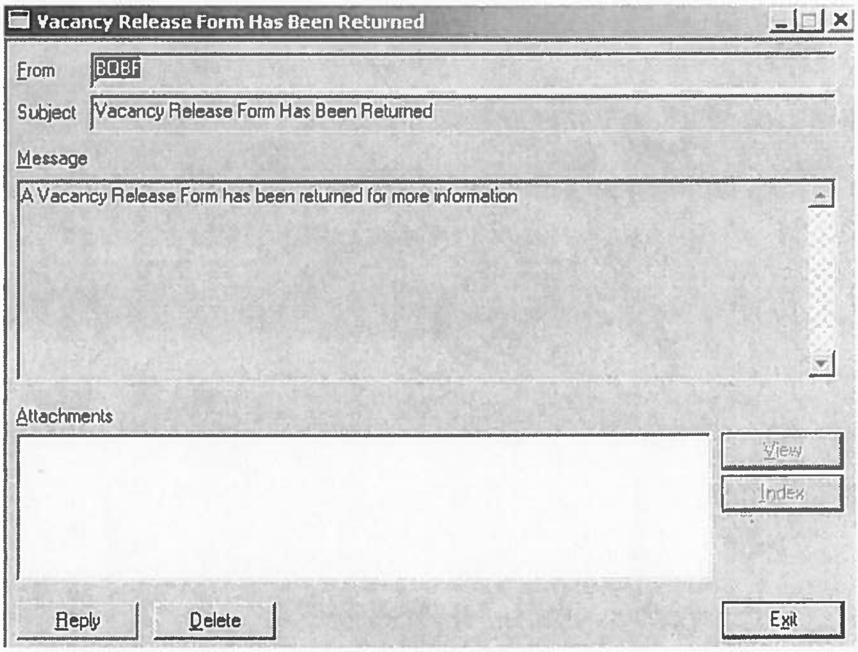
Once you have created and submitted forms, mail regarding those requests may be sent to you. If you have unread mail when you enter OnBase, the message "*You have new mail, read it now?*" will appear. Click on the Yes button to access your messages. You may also access your mail under the User Menu, Mailbox. This mail option is exclusive to OnBase and has no relation to your Outlook mail.

To access the Internal Mailbox, select Internal Mailbox in the left pane of the Mailbox dialog box.



Sample of Mailbox screen

The number of mail messages received will appear on the top with the subjects appearing below. To read a specific message, <u>double click</u> on the message.



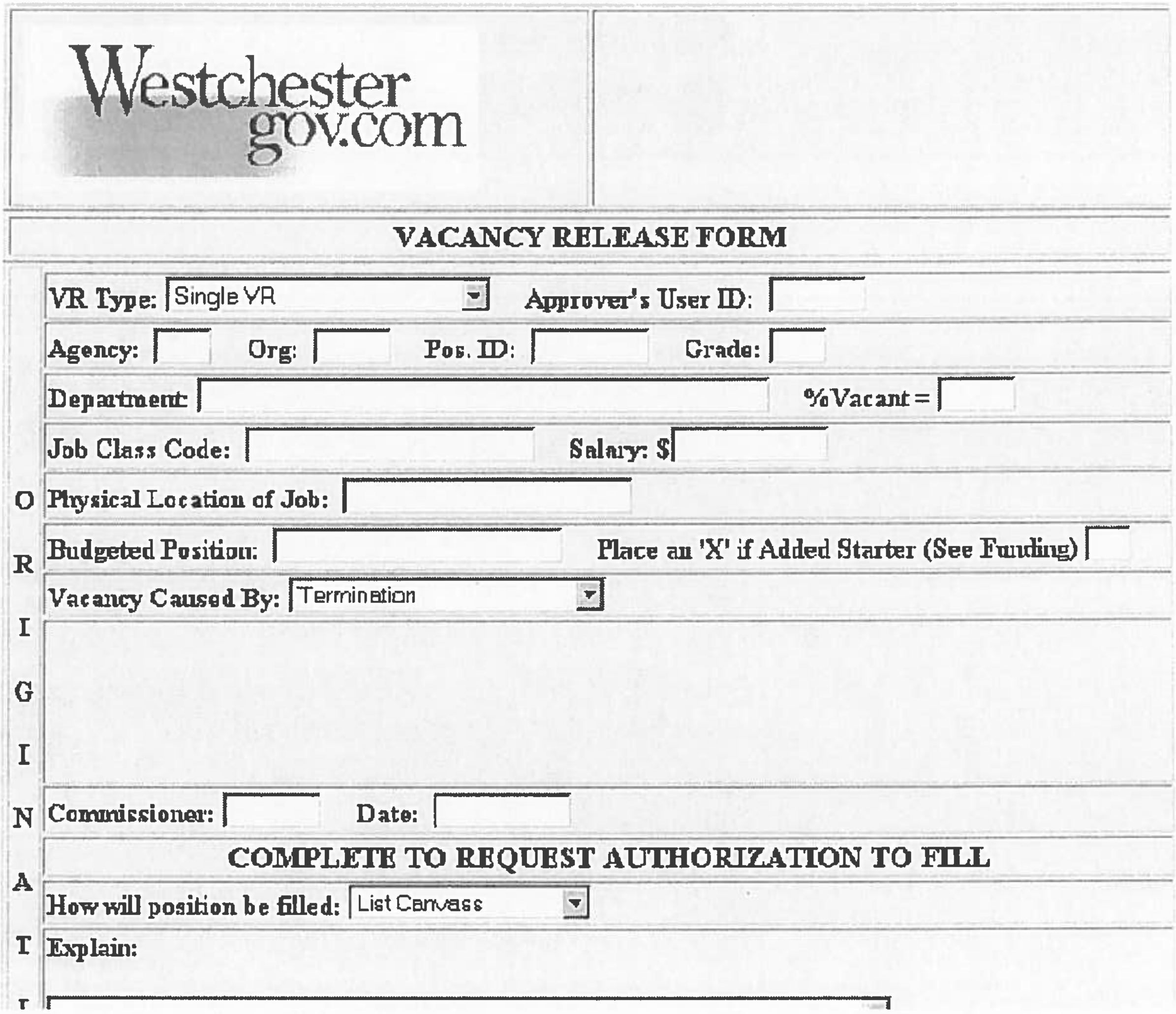
Sample of displayed message in Mailbox

Once the message is displayed, you may view any attachments, reply to the message or delete the message.

The Originator, that is the person that created the Vacancy Release form, and the Approver, that is the person who submitted the form to Budget, will get an Outlook email to notify them when the process is complete.

CREATING NEW FORMS

To create a new Vacancy Release Form, go the **File Menu** and select **New** then select **Forms**. A New Form Document menu will appear. Select **Create BD – Vacancy Release Form** from this menu and click on the Create button. The Vacancy Release Form will appear on the screen.



Westchester gov.com

VACANCY RELEASE FORM

VR Type: Single VR   Approver's User ID:

Agency: Org: Pos. ID: Grade:

Department: %Vacant =

Job Class Code: Salary: $

Physical Location of Job:

Budgeted Position: Place an 'X' if Added Starter (See Funding)

Vacancy Caused By: Termination

Commissioner: Date:

COMPLETE TO REQUEST AUTHORIZATION TO FILL

How will position be filled: List Canvass

Explain:

O R I G I N A T I

Sample of the Vacancy Release Form)

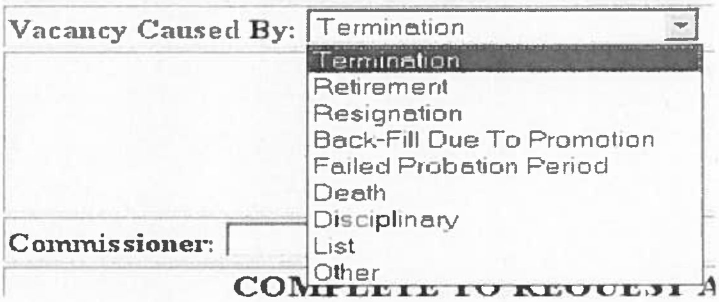
The VR is a dynamic form, changing fields depending on selections you make as you progress through the form. When you create a new VR, **Agency** and **Org** are required fields. Filling them in will result in several other fields, including **Department**, being filled in automatically, with the system getting the information from GHRS.

Creating A Vacancy Release Form

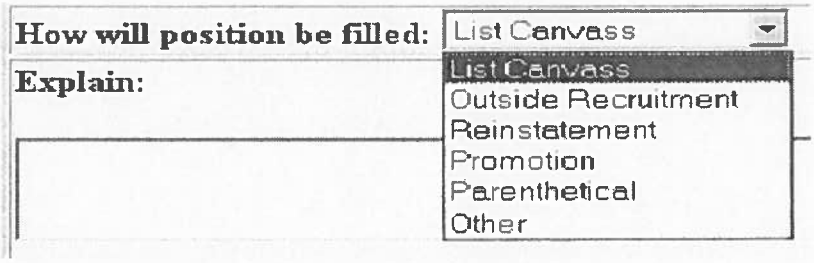
As mentioned, Agency and Org must be filled in. The following is a description of the other fields on the form, and how they are edited.

Field Name	Status	Notes
• Agency	Required	Enter the Agency, and the Department field will automatically be filled in from GHRS
• Org Code	Required	Enter the Org Code
• Position ID	Required	Enter the Position ID, and the **Grade**, **Title**, and **Budgeted Position** will be automatically filled in from GHRS The system will search for existing position numbers, therefore, submission of a VR request assumes that the position is certified and has been assigned a position number. Make sure that any line you wish to open has been properly certified and created before requesting a VR clearance.
• %Vacant	Required	A number between 0 and 100
• Salary	Required	Must be filled in
• Physical Location of Job	Required	Must be filled in
• Vacancy Caused By	Drop-Down List (see *1 below)	Select appropriate response from list. If 'Other' is selected, additional information must be entered
• How Will Position Be Filled	Drop-Down List (see *2 below)	Select appropriate response from list. If 'Other' is selected, additional information must be entered
• Job Class Code	Sometimes Required	Required only if position is to be filled parenthetically
• Effective Date	Required	Minimum two week lead time. Can be selected from the calendar box
• Why must position be filled?	Required	Enter a short description of why this position is required
• How will funding be provided?	2 Drop-Down Lists (see *3 below)	Select appropriate responses from lists. If 'Other' is selected, additional information must be entered

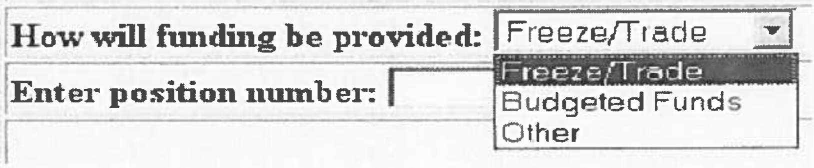
*1 – **Vacancy Caused By** – Drop-down list:

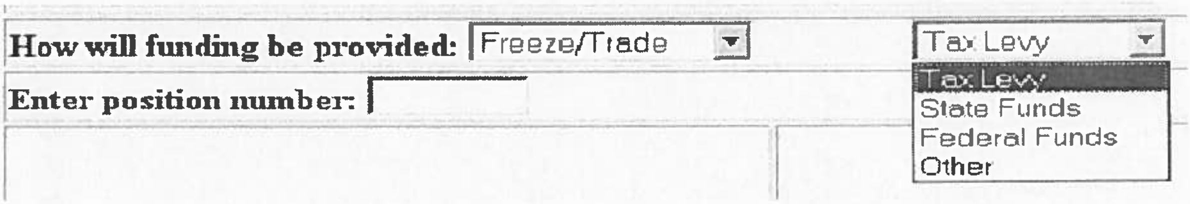


*2 – **How Will Position Be Filled** – Drop-down list:



*3 – **How Will funding Be Provided** – Two drop-down lists:





You should select Tax Levy, State Funds, or Federal Funds **ONLY** if the position is <u>100% funded</u> by one of these sources. Otherwise, select Other and provide a percentage breakdown in the additional information box that appears when you select Other.

Example for Dept. of Community Mental Health: Select **Other,** in the additional information box enter **State xx%, Tax Levy xx%**

Example for Social Services: Select **Other,** in the additional information box enter **State xx%, Federal xx%, Tax Levy xx%**

Example for Budget Dept: Select **Tax Levy**, no other information required.

The next sections of the form are the Budget Department Section, the Human Resources Section, and the County Executive/Deputy County Executive Section. The appropriate people in each area will review the form in sequence. The individual queues will be explained in more detail further on in this manual.

WORKFLOW QUEUES

Each Vacancy Release request you input will run through the following queues prior to final approval. The form name assigned to your request is determined by the data input. This form name will appear within the document section of each queue and each request will be assigned a unique ID number. It is no longer necessary for you to contact Human Resources or Budget to determine the status - you can check on it yourself by tracking it through each queue by using the unique ID number.

Originator

Once the form is filled out by the designated person in the requesting department, it is sent to the 'Originator' queue so that it can be double checked, and any additional documentation can be attached. This is also the queue that a request is returned to if additional information is required by the Budget or Human Resources Departments. The following tasks can be performed by double-clicking on the appropriate button located on the task bar along the right side of the screen.

- ***Attach A Quick Note***
  Allows the user to create an Eform with a blank text field for quick notes, questions, or additional information without having to open Word for additional documentation.

- ***Forward To Authorized Submitter***
  When completed, this task will forward the request to the person in the department that is authorized to submit it to Budget.

- ***Remove This Request***
  Allows the originator to remove a form and documentation, which have never been submitted to Budget, from the life cycle. If the user wants to make a request sometime in the future, he/she must create a new form.

- ***Attach Supporting Document***
  Allows the submitter to attach supporting documentation to the request. The submitter can browse to the folder that contains the correct document to attach.

Hold For Authorized Submit

Once the designated person in the originating department has created and submitted forms, they are routed to this queue for department managerial approval prior to further submission to Budget. This queue has the following tasks, which must be double clicked in order to access:

- ***Submit Request***
  Allows the manager to submit the request to the Budget Analyst.

- ***Return To Originator***
  Allows the manager to return the request to the person that filled it out for more information or to attach documentation.

- ***Remove Initial Request from Life Cycle***
  Allows the manager to remove a form and documentation, which have never been submitted to Budget, from the life cycle. If the user wants to make a request sometime in the future, he/she must create a new form.

- ***Attach Supporting Document***
  Allows the submitter to attach supporting documentation to the request. The submitter can browse to the folder that contains the correct document to attach.

Budget Analyst

The Budget Analyst is the next stop in the approval cycle. This queue has the following tasks, which must be double clicked in order to access:

- ***Forward To Budget Director***
  Allows the Budget Analyst to forward the request to the Budget Director.

- ***Return to Originating Dept.***
  Allows the user to return the document to the originator should additional supporting documentation be needed.

- ***Attach Quick Note***
  The Attach Quick Note task allows the Budget Analyst to create an Eform with a blank text field for quick notes, questions, or additional information without having to open Word for additional documentation.

- ***Attach Budget Eyes Only Document***
  This task creates an Eform with a blank text field, similar to Attach Quick Note. To access this page once this task is selected, go to the Work Folder of the document. You will see a "VR-Budget Eyes Only" document listed. Double click on this document to have the page displayed on the right. Type in the necessary text and click on the Submit button to save the text. This document is viewable only by the Budget Department.

Budget Director

The Budget Director is the next stop in the approval cycle. This queue has the following tasks, which must be double clicked in order to access:

- ***Forward To HR Analyst***
  Allows the Budget Director to forward the request. A User Interaction message will appear requesting one of the following: **Sign, Don't Sign** or **Cancel**.

  - Clicking on the Sign button will distribute the request to the appropriate HR Analyst.
  - Clicking on Don't Sign or Cancel buttons stops the approval and distribution.

- ***Return to Originating Department***
  Allows the Budget Director to attach documentation as to why the form is being returned and distribute it back to the originator.

- ***Attach Quick Note***
  The Attach Quick Note task allows the Budget Director to create an Eform with a blank text field for quick notes, questions, or additional information without having to open Word for additional documentation.

- ***Attach Budget Eyes Only Document***
  This task creates an Eform with a blank text field, similar to Attach Quick Note. To access this page once this task is selected, go to the Work Folder of the document. You will see a "VR-Budget Eyes Only" document listed. Double click on this document to have the page displayed on the right. Type in the necessary text and click on the Submit button to save the text. This document is viewable only by the Budget Department.

- ***Return to Budget Analyst***
  Allows the Budget Director to return the document back to the Budget Analyst for more information.

In all cases, the existing Word document or HTML quick note can be edited to add an explanation rather than creating new documents. The editor can differentiate a new font or color in Word, but cannot do that in the Quick Note.

Personnel Analyst

The Personnel Analyst is the next stop in the approval cycle. This queue has the following tasks, which must be double clicked in order to access:

- ***Forward to Director of Classification***
  A User Interaction will appear prior to further distribution. The message will state: *"Is the position encumbered?"*

  - If YES, the Personnel Analyst will be required to attach an explanation. A Windows Browse box will appear to allow them to attach a previously created explanation document. When complete, the message *"Please sign this form by clicking the Sign button"* will appear in the User Interaction area. Clicking on the **Sign** button will distribute the request to the Director of Classification. Clicking on **Don't Sign** or **Cancel** buttons stops the approval and further distribution. The document will remain in the queue to be processed at a later time.

  - If NO, the message *"Please sign this form by clicking the Sign button"* will appear in the User Interaction area. Clicking on the **Sign** button will distribute the request to the Director of Classification. Clicking on **Don't Sign** or **Cancel** buttons stops the approval and further distribution. The document will remain in the queue to be processed at a later time.

  Prior to submitting to the next queue, the Personnel Analyst will be prompted for document attachments. Documents are not required on approvals unless specified.

- ***Return to Originating Department***
  Requires that the Personnel Analyst attach a Quick Note prior to returning the request to the originator. This is usually done when additional supporting documentation is needed from the originator or the Analyst needs a question answered.

- *Request Approved*
  When a request is approved, it is sent to the Commissioner of HR for approval.

- *Attach Quick Note*
  The Attach Quick Note task allows the Personnel Analyst to create an Eform with a blank text field for quick notes, questions, or additional information without having to open Word for additional documentation.

Commissioner of HR

The Commissioner of HR is the next stop in the approval cycle. This queue has the following tasks, which must be double clicked in order to access:

- ***Commissioner Approved***
  Allows the Commissioner of HR to approve the request. A User Interaction message will appear requesting one of the following: **Sign, Don't Sign** or **Cancel**.

  - Clicking on the Sign button will distribute the request to the Deputy County Executive queue
  - Clicking on Don't Sign or Cancel buttons stops the approval and further distribution.

- ***Return to Department***
  Allows the Commissioner of HR to inform the originator that the request needs more information. Documentation explaining why the document was sent back is required to be attached using a Quick Note.

- ***Attach Quick Note***
  The Attach Quick Note task allows the Director of Classification to create an Eform with a blank text field for quick notes, questions, or additional information without having to open Word for additional documentation.

Deputy County Executive

The Deputy County Executive is the next stop in the approval cycle. This queue has the following tasks, which must be double clicked in order to access:

- ***DCE Approved***
  Allows the DCE to approve the request. A User Interaction message will appear requesting one of the following: **Sign, Don't Sign** or **Cancel**.

  - Clicking on the Sign button will distribute the request to the PVAC Processor queue
  - Clicking on Don't Sign or Cancel buttons stops the approval and further distribution.

- ***Return to Department***
  Allows the DCE to inform the originator that the request needs more information. Documentation explaining why the document was sent back is required to be attached using a Quick Note.

- ***DCE Rejected***

Allows the DCE to reject the request. A User Interaction message will appear asking if this document is to be rejected.

- Clicking on the Yes button will distribute the request to the Remove From Life Cycle ques and a notification will be sent to the originator
- Clicking on No or Cancel buttons stops the rejection and further distribution.

- ***Attach Quick Note***
  The Attach Quick Note task allows the Deputy CE to create an Eform with a blank text field for quick notes, questions, or additional information without having to open Word for additional documentation.

PVAC Processor

The PVAC Processor is the final stop in the approval cycle. The PVAC screen to open the line will not be created until a Vacancy Form has been approved through all steps of the OnBase process. This queue has the following tasks, which must be double clicked in order to access:

- ***Attach Quick Note***
  The Attach Quick Note task allows the PVAC Processors to create an Eform with a blank text field for quick notes, questions, or additional information without having to open Word for additional documentation.

- ***Has PVAC Been Completed?***
  Asks if PVAC transaction was done. A User Interaction message will appear requesting one of the following: **Yes, No,** or **Cancel**.

  - Clicking on the Yes button will distribute the request to the Remove from Life cycle queue for 2 week, and send an email to the originator and approver.
  - Clicking on No or Cancel buttons stops the approval and distribution.

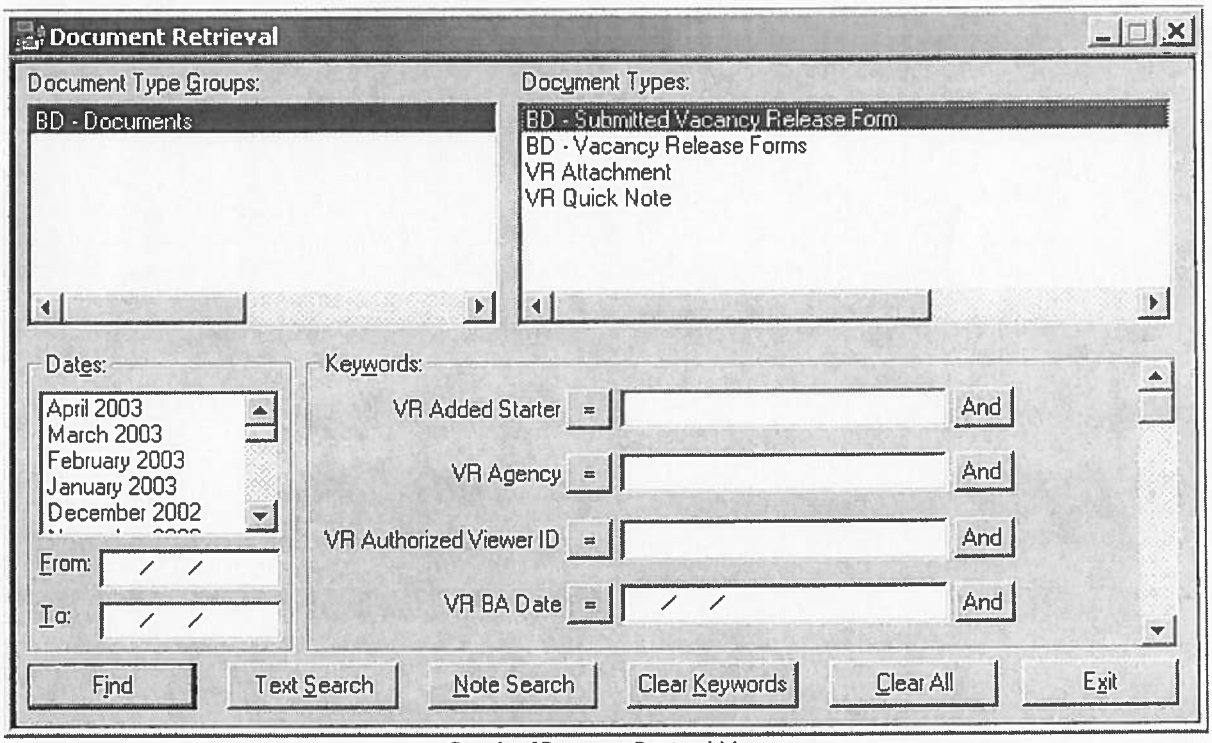
DOCUMENT RETRIEVAL

Overview

The **Document Retrieval Dialog** box will help you locate documents stored in the system. You may limit your document search by document group, document type, document date, and keywords. The more specific the search criteria you provide, the greater the chance of locating the exact document(s) contained within the system.

You can open the Document Retrieval dialog through two methods:

- Click on the Retrieve Documents toolbar button .
- Select *Open* from the *File* menu, and then select *Retrieve Document* from the submenu.



Sample of Document Retrieval Menu

There are many ways in which you can limit your search and each of these ways corresponds to a keyword on the document. You may enter as many or as few of these keywords as you wish. Once information has been entered, click the **Find** button to perform the search. If there are documents in the system that meet the search criteria, the Document Search Results Window will open with the resulting list of documents. If no documents were found, you will be told that no documents matched the criteria specified.

Document Retrieval Concepts

Before you begin utilizing the advanced capabilities of the OnBase Client Module, it is important that you understand the basic concepts of a document, document type, document type group, keyword type, and keyword. These concepts are fundamental in your understanding of the OnBase System.

- ***Document***

  A document is a specific piece of information your organization has chosen to store electronically in the OnBase system. A Vacancy Release form and its supporting documentation are examples of documents.

- ***Document Type Group***

  Document type groups are defined to group together a set of similar document types, providing the broadest search category. Unless this document type group was configured to allow group searching, you will also have to select one or more document types on the right side of the dialog as well. For example, Budget Documents may be a document type group that contains all the various types of budget document types.

- ***Document Type***

  Each document that is brought into the OnBase system is assigned to a document type. The document type determines which keywords are associated with a document. For example, the document types that are in the Budget Documents Document Type Group may be the Vacancy Release form, Detailed Justifications, Departmental Explanations, etc.

  The search criteria associated with a document type will be displayed under the keyword section of the dialog box when the document type is selected. You can select more than one document type by holding down the Ctrl or Shift keys as you select the document types. As more document types are selected, the list of search criteria in the keywords section will be limited to only those keywords that all the selected document types have in common.

- ***Keywords***

  A keyword is an identifying piece of information used to locate documents stored in the OnBase system. In the *Sample of Document Retrieval Screen* shown above, some of the keywords established for the Vacancy Release form are shown, such as VR Agency.

- ***Dates***

  The Dates section allows you to specify a specific date or range of dates that the documents found must match or be within. The desired months can be selected from the list box, or a range of dates may be typed into the **From** and **To** edit fields. The **Date** section of the **Retrieval Dialog** may be filled automatically by specifying a Default Date in the **User Options**.

- *Action Buttons*

Find Executes a search using the information configured in the Document Retrieval dialog.

Text Search Opens an additional dialog box allowing you to conduct a more specialized search for specific text within any of the document types selected. This kind of search generally takes much longer to return results.

Note Search Opens an additional dialog box allowing you to conduct a more specialized search for documents that have a particular type of note or by a specific string existing in a note. We have not used this function in this application.

Clear All Clears all highlighted information and information entered in the edit fields.

Clear Keywords Clears only the information entered in the keyword edit fields.

Exit Exits the Document Retrieval dialog box without executing a search.

Document Retrieval Procedure

Follow this procedure to conduct a basic document retrieval using the document retrieval dialog box:

- If the Document Retrieval Dialog doesn't appear when you login to OnBase:
  - Click on the retrieve documents icon located on the client toolbar or;
  - Select the **Open** option from the **File** menu followed by the **Retrieve Document** option from the **Open** sub-menu.

- Highlight the appropriate document type group from the **Document Type Groups** list box. If you elect to limit your search by document type group, you must also select a document type. Selecting a document type group is optional.

- Highlight the appropriate document type from the **Document Types** list box. You will not be able to execute a search until you select a document type. You may select multiple document types by holding down the shift key or Ctrl key when you make your selection. This option may be used in conjunction with the document type group, date, and keyword search options.

- If you wish to conduct a search using a **Date Range**, enter a "from" date and a "to" date in the *From* and *To* edit fields, or highlight the appropriate dates from the *Dates* list box. A date search can only be executed after you have selected a document type.

- Enter the necessary information in the **Keywords** edit fields if you wish to conduct a search using keywords. The edit fields will differ depending on the document type(s) you have selected. A keyword search can only be executed after you have selected a document type.

- Click the **Find** button.

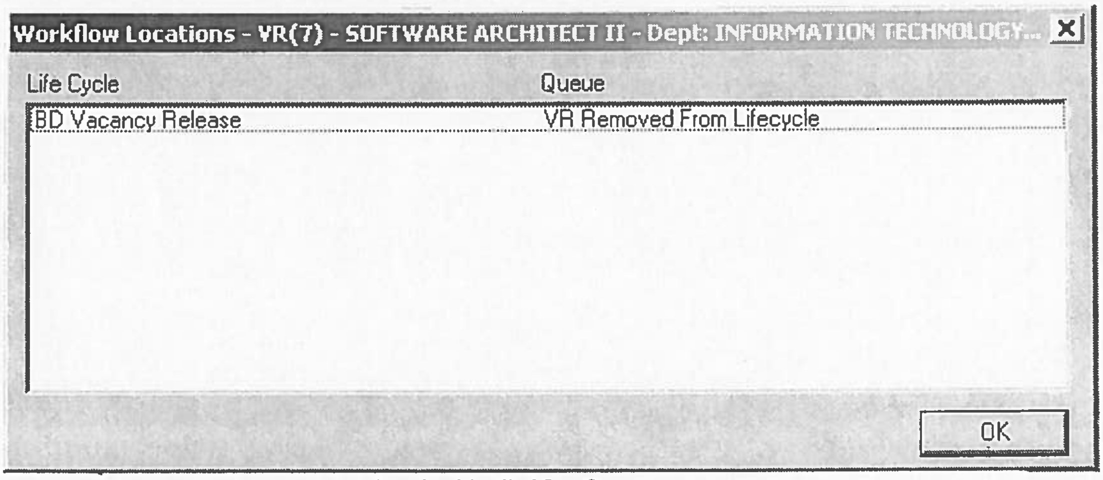
- If there are documents in the system that meet the search criteria, the Document Search Results Window will appear displaying the documents. If there are no matching documents in the system, a system message box will appear, indicating that no documents were found. Check to make sure your search criteria were configured correctly and conduct your search again, if necessary.

Locating the VR Form in the Life Cycle

It is no longer necessary to call Human Resources or Budget to determine the status of your request. You may now look at the request under each specific queue. Within the Document Retrieval dialog, you can find the status of the VR through two different methods.

- ***Option One***

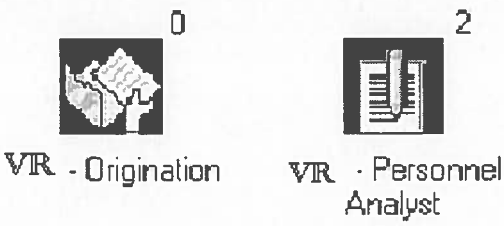
  - To find the status of the VR using the Document Retrieval dialog box, you must select the "BD – Submitted Vacancy Release Form" document type.
  -
  - To find out where the document is within the life cycle, select the document and right click on it. Select Workflow Queues from the drop down menu. A dialog box will appear stating the name of the life cycle and the current queue in which it is located.



Sample of the Workflow Queue

- ***Option Two***

  If you have only one request going through the life cycle at any given point in time, you can display the graphical Workflow by selecting the Workflow icon from the toolbar and looking for the number above any queue. The sample below shows that your request is currently in the Personnel Analyst queue.



PRINTING

Overview

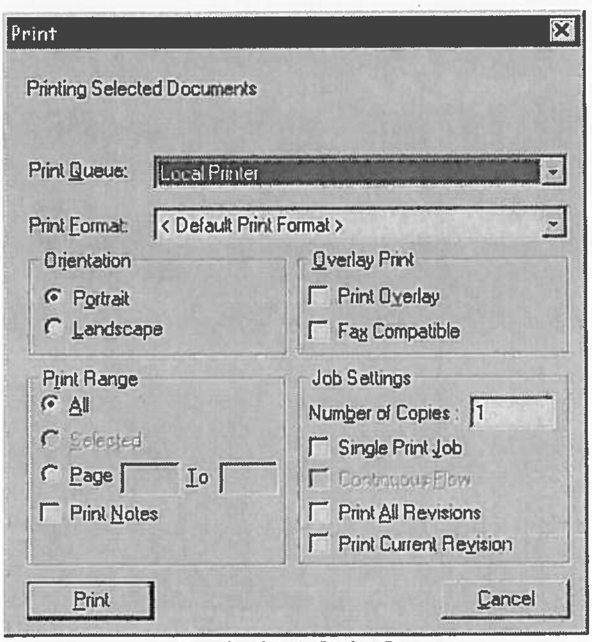
Text and image documents, whether open or selected from a list, may be printed by using any of the available print menu options. When you elect to print documents you are creating a print job. Many print jobs may contain single documents, while others may contain multiple documents. Access to basic printing is spread throughout the client application. When documents are selected for printing, the **Print** dialog will appear.

Printing Documents

Once you have selected the document(s) from the Document Search Results dialog, there are several ways you can access the print menu:

- Choose the **Print** option from the **File** menu
- Select the Print Button from the toolbar. 
- Right click on the selected document and choose the **Print Selected** option
- If you already have a document open, you can choose the **Print Document** menu choice from the right-click menu.
- You can also choose the **Print Selected** option from the right-click menu of any of the batch windows to print all the documents in the batch.

Any of those methods result in the following dialog box:



Sample of Print Dialog Box

The Print dialog presents a fairly standard set of options that can be used during printing. These options may vary slightly depending on whether one or more documents are selected, or whether a batch of documents has been selected. The meaning of most of the options remains the same in either case.

- **Print Queue:** The print queue will default to your Windows default printer. You need not change this.

- **Print Format:** Select the print format that will be used from the drop-down list. It is important that you remember that the print font and print style are determined by your print format. Text documents may not necessarily look the same, when printed, as they look on your monitor.

- **Orientation:** Select whether you want the document(s) to print portrait style (north and south) or landscape style (east and west).

- **Print Range:** Select the *All* radio button in the Print Range section if you are printing an entire document or multiple documents. In most cases, this button will already be selected. Select the *Selected* radio button in the Print Range section if you are printing selected text within an open document.

- **Overlay Print:** We are not using any overlays for this application.

- **Job Settings:** Enter the number of copies of the designated document that you would like to print, in the *Number of Copies* edit field.

  Single Print Job indicates that when printing multiple documents, you would like to process all pages of all documents in the print job before printing. Example: a print job that consisted of five 10-page documents. With the Single Print Job check box selected, all 50 pages (five 10 page documents) will be processed before anything is printed.

  The *Print Current Revision* checkbox is not visible on the dialog when a batch is selected.

  The *Print All Revisions* checkbox allows you to maintain the same settings across all the documents (if multiple documents were selected). You must set all the fields prior to selecting this option.

- Click the **Print** button.

QUICK REFERENCE SHEET

Login to Workflow

- Click on the OnBase Client icon.
- Enter User Name and Password.
- Click on OK button.

Accessing Workflow Mail

- Select ***Mailbox*** from the ***User Menu***.
- Select ***Internal Mail*** from the left pane displayed (mail will be displayed in the right pane).
- To read a specific message, double click on the message.

Creating New Forms

- Go to the ***File Menu*** and select ***New***, then select ***Form.***
- Select ***BD – Vacancy Release Forms***.
- Input the correct information for the remaining fields. *(see specific sections within the manual for further information)*
- Click on the ***Submit*** button to add the form to the OnBase system
- The form will be submitted to the ***VR – Originator*** where any attachments can be added if necessary.
- It then goes to the ***VR – Hold For Authorized Submit*** queue for approval and submission to Budget. If the Originator and Submitter are the same person, they still need to go to each quue to perform the appropriate functions.

Updating Supporting Documentation

- Click on the request name under the ***Document*** tab of the queue where the request currently resides.
- Double click on the supporting document name that appears in the ***Work Folder*** tab for the request
- Make the appropriate changes to the document.
- To save the changes, click on the VR Request name under the Document Tab
- When you receive the message *"The active document has been changed. Save changes?"*, click on the ***Yes*** button.
- On the Document Revision dialog box, click on the ***Save as New Document*** button.
- On the Import Document dialog box, select the Document Type from the drop down list, and enter the VR Unique ID for that request. When complete, click on the ***Import*** button.

Document Retrieval

- Click on the Retrieve Documents toolbar button .
- Select ***Open*** from the ***File*** menu.
- Select ***Retrieve Document*** from the submenu.
- Enter the search criteria desired under the keywords section.
- Click on the ***Find*** button to perform the search.

Finding the Status of a VR Request

- On the Document Retrieval dialog box, select the ***BD – Submitted Vacancy Release Forms*** document type.
- Select the document and right click on it.
- Select Workflow Queues from the drop down menu
- A dialog box will appear stating the name of the life cycle and the current queue in which it is located.

Printing

- Select the document(s) from the Document Search Results dialog.
- Select one of the following methods:
  - Choose the ***Print*** option from the ***File*** menu, or
  - Choose the ***Print*** button from the toolbar, or
  - Right click on the selected document and choose the ***Print Selecte***d option.
  - If a document is open, you can choose the ***Print Document*** menu choice or the ***Print Selected*** option from the right click menu.
- When the Print Dialog box appears, make the desired selections and then click on the ***Print*** button.

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Robert P. Astorino
County Executive

Department of Budget

Lawrence C. Soule
Budget Director

TO: Commissioners and Directors

FROM: Lawrence C. Soule
Budget Director

DATE: October 14, 2011

RE: Changes to OnBase Forms:
Vacancy Release, Salary Exemption Request, and Seasonal/TEMP Request

Beginning with appointments effective today, October 14, 2011, approval will be required for appointments within your department. This is in addition to situations where Vacancy Release approval is already required.

Change to Vacancy Release Form

As a result of the new requirement, changes have been made to the OnBase Vacancy Release form to provide more relevant information regarding how the position will be filled. The form will now be called the Vacancy Release/Budget Approval Form to more accurately reflect its purpose. Information required in the "How will position be filled" section has changed to include whether this position will be filled from an eligible list, and to provide more relevant options for how the position will be filled. When a position will be filled from within your department, you should also include the position number of the position being vacated. A more detailed explanation is provided on the next page.

Change to Salary Exemption Request Form

Requests for salary increments for non-represented employees must now be processed through the OnBase Salary Exemption Request form. A new selection, "Non-Rep Increment", has been added to the form for this purpose.

In addition, Salary Exemption Requests will require workflow approval by the CE Liaison and by the DCE.

Change to Seasonal/Temp Request Form

Seasonal/Temp/Hourly Requests will require workflow approval by the CE Liaison and by the DCE.

Vacancy Release/Budget Approval Form

The OnBase form has been changed in the section where you provide information about how the position will be filled. You will now indicate whether or not you will be making a list appointment, and then choose from the following options for "How will position be filled":

Michaelian Office Building
148 Martine Avenue, Suite 311
White Plains, New York 10601 Telephone: (914)995-2850 Fax: (914) 995-2281 Website: westchestergov.com

- Promotion Within the Department
- Promotion From Other County Dept
- Demotion Within the Department
- Demotion From Other County Dept
- Lateral Move Within the Department
- Lateral Move From Other County Dept
- Outside Recruitment
- Position Change – Grant to Tax Levy
- Position Change – Tax Levy to Grant
- Unknown (Provide Explanation Below)

The form should be completed as usual, but the following are guidelines related to the changes in the form:

- If the option "Position Change - Grant to Tax Levy, "Position Change – Tax Levy to Grant to Tax Levy," or "Unknown" is selected, the list appointment box should be left blank. For all other options, "Yes" or "No" must be selected.
- For any appointments from within your department, the position number of the position being vacated should be included in the explanation box. If the employee is staying in the same position (and the line is being recertified, or the employee was parenthetical), this should be indicated in the explanation box.
- Please note the options on this form are not the same as the personnel transaction that will be reported to Human Resources on a PTF. For example, an employee who is being reinstated from another agency would be reported as a "Reinstatement" on the PTF, but "Outside Recruitment" should be selected for the Vacancy Release/Budget Approval form.
- We understand that you may not know how the position will be filled when submitting requests. In these instances, "Unknown" may be selected, but an explanation is required in the space provided. This would include how the department will proceed or any thoughts on how the position might be filled. For example, "we plan to canvass the eligible list", or "we are considering candidates from within our department". Specific names should not be included in this form. Be aware that selection of "Unknown" as an option may delay approval, or prompt calls from your Budget Analyst.

In summary, VR approval is now required for the following situations:

- New Hires, Rehires, Reinstatements, Transfers from outside localities, and Preferred Eligible Rehires.
- Promotions, Laterals, Demotions and Transfers from another department to your department.
- Internal movements from Grant to Tax Levy positions, including position changes.
- "Promotions" from hourly to annual salaried positions. In these instances, the hourly employee should be separated and then rehired.
- Appointments within your department.

We thank you for your anticipated cooperation.

CC: Kevin J. Plunkett
Joseph Kenner
Bill Mooney
Christine Sculti
Marguerite Beirne
Kerry Oristano