



## OnBase for ePANs

This guide outlines the steps necessary to navigate OnBase and the electronic personnel action notice. These steps include OnBase installation, accessing OnBase through CougarApps, and filling out, approving, and tracking ePANs.

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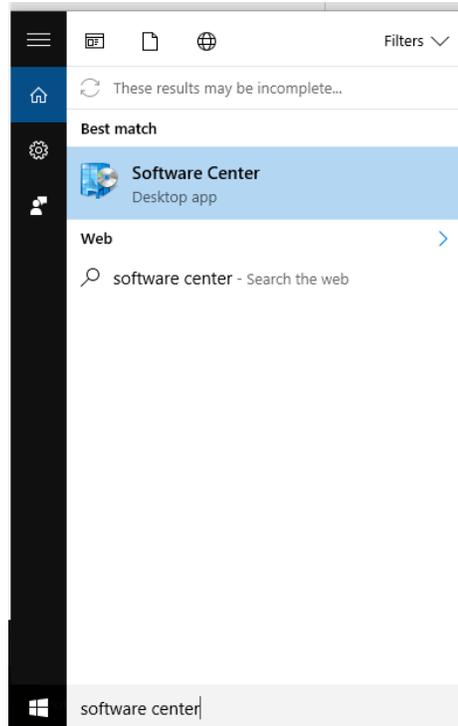
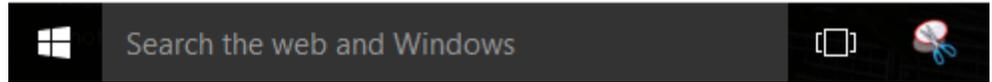
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## Installing OnBase – Windows 10 version

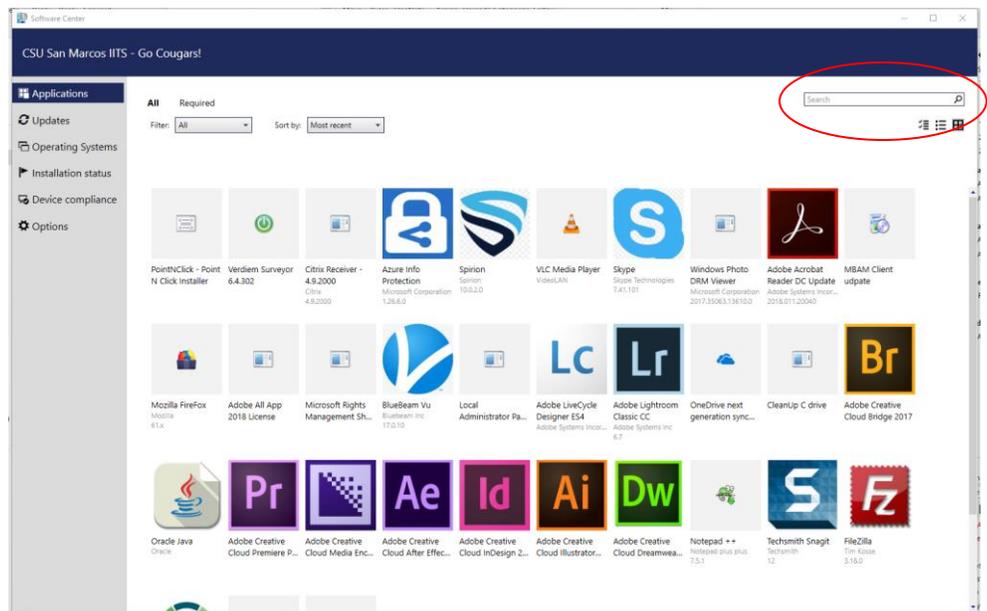
The OnBase Unity Client program can be installed onto PCs only. Mac computers must access OnBase solely through CougarApps. If you are a PC user, and have the Windows 7 version, please refer to this link for installation instructions: <https://www.csusm.edu/projects/ecm/ecm-documents/support-how-to-install-onbase-unity-client-via-software-center.pdf>

Navigate to the Search Bar located on the bottom left of your screen.

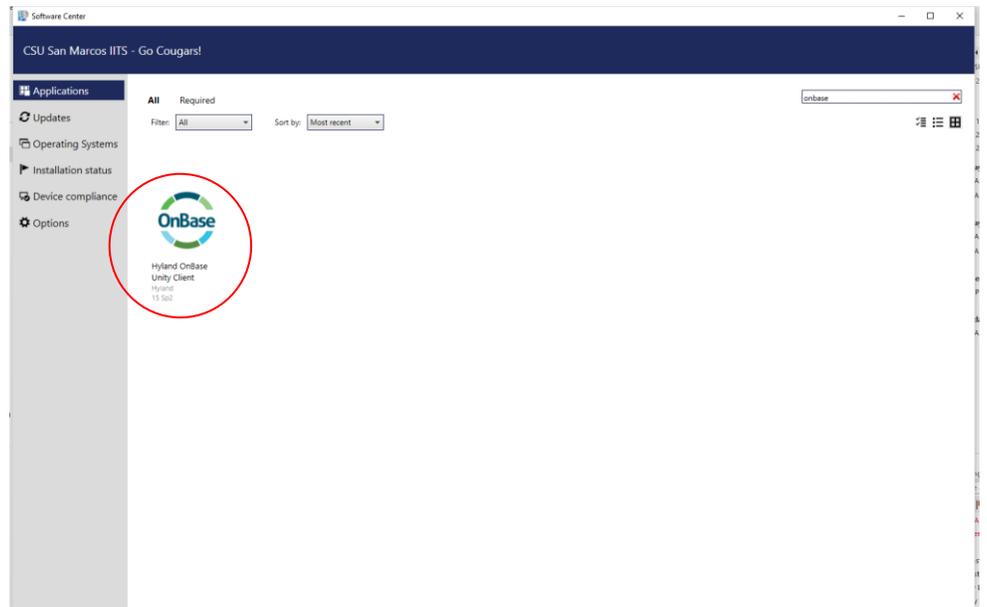
In your Search Bar, type in “Software Center”, and click on the “Desktop app” result.



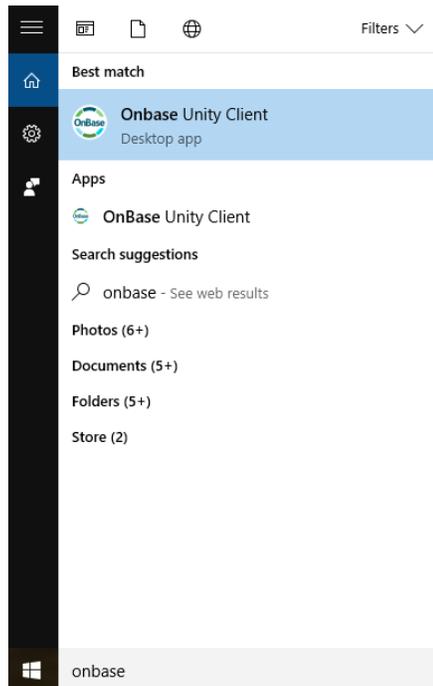
Navigate to the Search Bar in the upper right hand corner.



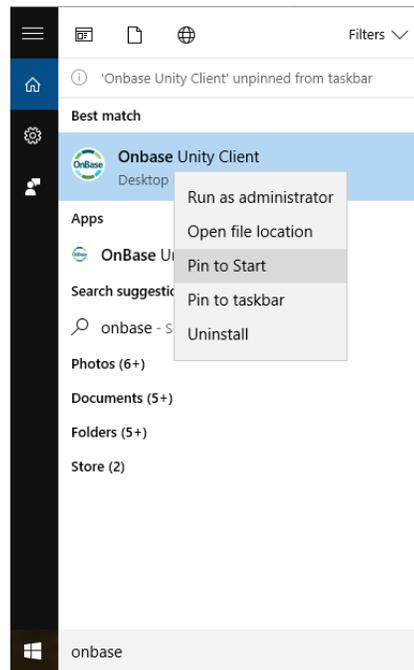
Type in “onbase” and select the option that says “Hyland OnBase Unity Client”.



**(Recommended)**  
Look up “onbase” in your Search Bar, and right-click on the option that says “Desktop app”.



Select the option that says "Pin to Start".



The OnBase icon should now appear in your toolbar at the bottom of your monitor.

*You can now click on the OnBase icon, and it will automatically open up the program without you having to search for it every time.*



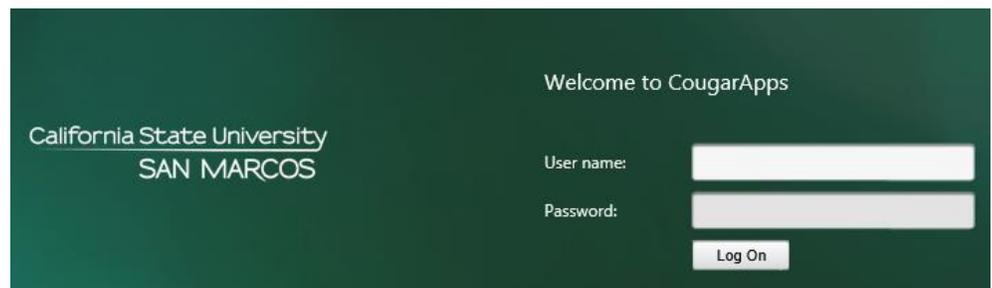
## Accessing OnBase via CougarApps

The OnBase program through CougarApps gives PC users an alternate way to access the program, and is the only way for Mac users to access OnBase.

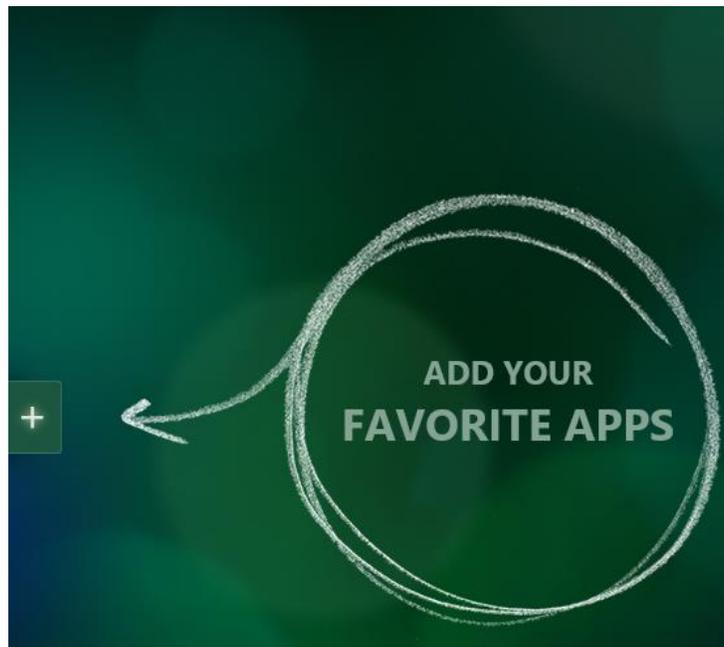
**Copy and paste the following hyperlink in the address bar of your internet browser, then log in using your same credentials that you use to log into your computer.**

<https://cougarapps.csusm.edu/vpn/index.html>

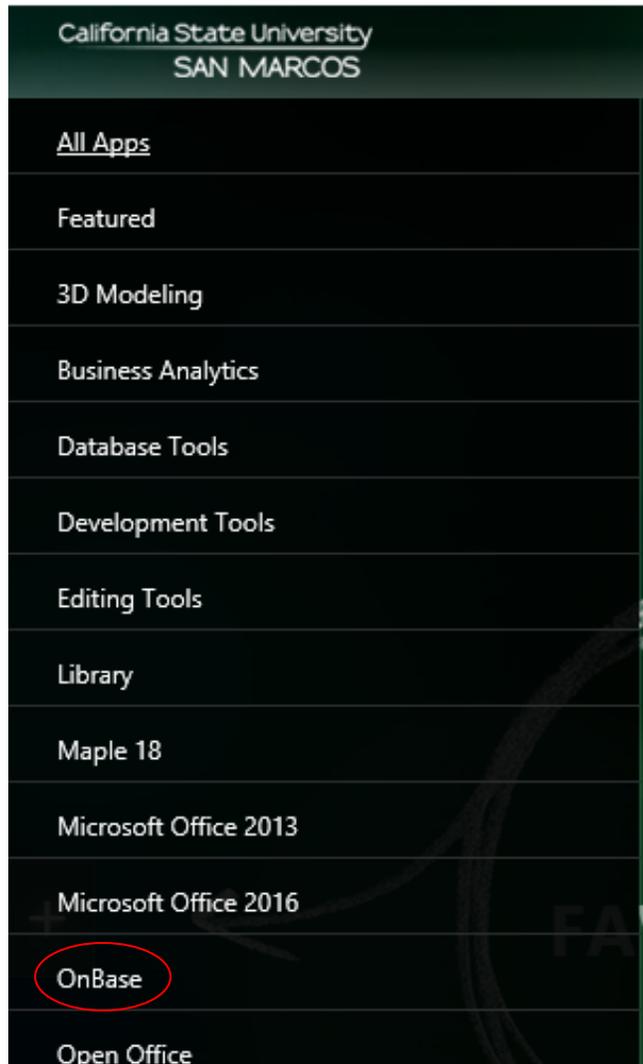
*Please note that you cannot be using a wireless connection when accessing CougarApps, and depending on where you are, it may take a minute or two to load CougarApps.*



If OnBase does not already populate on your screen, click the plus sign to find available software.

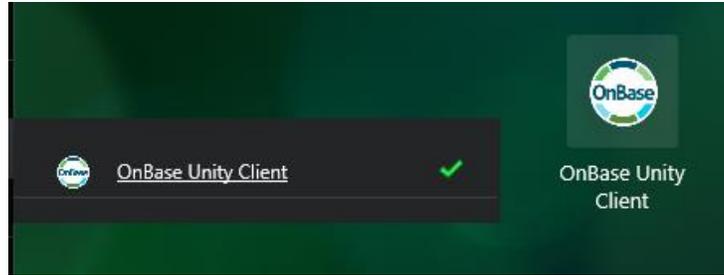


Under "All Apps", locate and click on "OnBase".



Select “OnBase Unity Client”, and it should upload onto your screen.

Once loaded, the application will work exactly the same as the actual program that is available for installation on PCs.



## Logging into OnBase

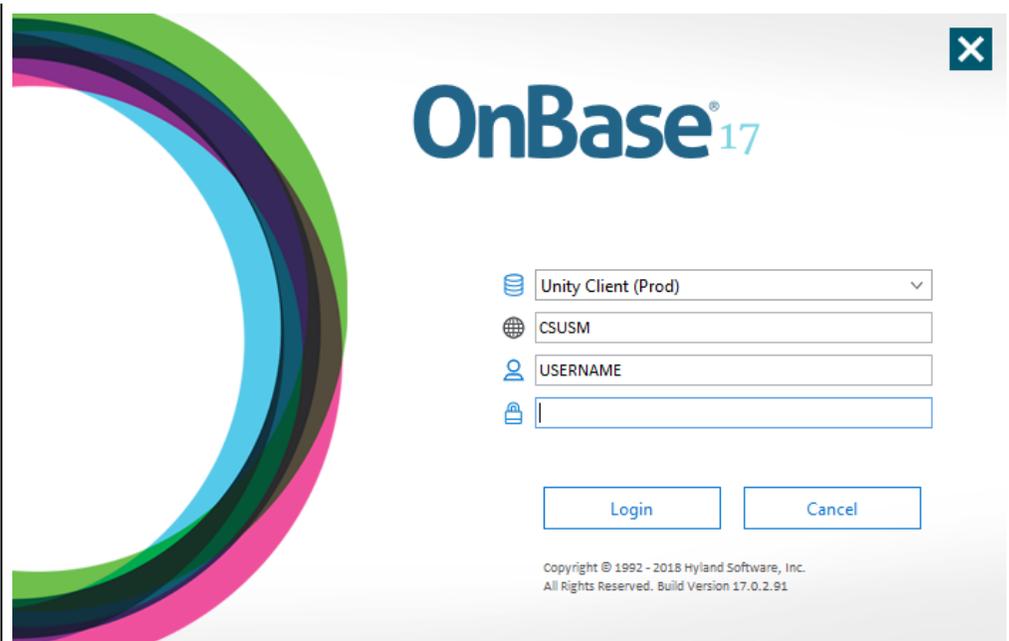
You will login in using the same credentials you use to log into your computer.

After clicking on the OnBase program, a separate pop-up box will appear.

You will be locked out of your account:

1. After 5 failed login attempts (the system will auto-release after 15 minutes)
2. Your OnBase account has not been used for a period of 190+ days (contact the IITS Help Desk to unlock your account)

*If this is the first time you are accessing OnBase, it may take a minute or two for the pop-up box to appear.*



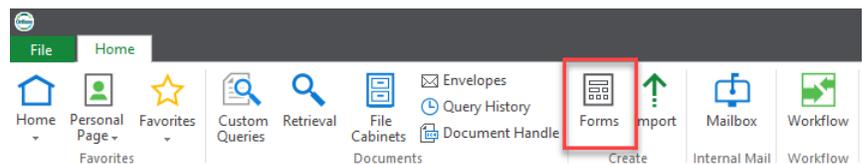
## Initiating an ePAN

Both submitters and approvers can initiate ePANs.

In the OnBase ribbon, select the “Forms” button to begin the initiation process.

You will need three things before initiating an ePAN:

1. Employee ID
2. New Action Section sequence
3. New position number (if applicable)



On the left-hand side of the screen, locate and click on “ePAN”.

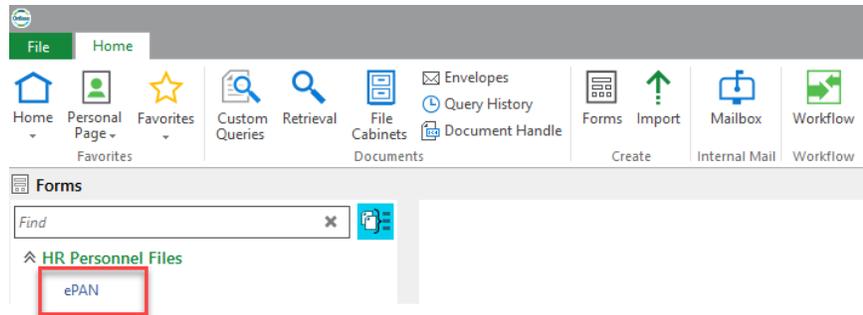
Begin filling out the criteria that is marked with a red asterisk – “PS EMPLID” (PeopleSoft Employee ID).

All other boxes in grey will auto-populate directly from PeopleSoft. You cannot type in any grey box.

Student ePANs: The student ID is the same as their employee ID.

Staff ePANs: If you have a new staff hire that has never worked on campus before, and did not get accepted for the position through the iCIMS recruitment system, please contact your HR Analyst to have a PeopleSoft Employee ID generated.

Only use the “Tab” key as you are filling out the ePAN (pressing “Enter” will automatically submit the ePAN). The OnBase system uploads any new information from PeopleSoft every day at 7:00 P.M. For example, if an HR Analyst creates a new employee ID, the ID will not be recognized in the OnBase system until after 7:00 P.M. that day.



The screenshot shows the 'ePAN (Electronic Personnel Action Notice) Form' for California State University San Marcos. The form is titled 'ePAN (Electronic Personnel Action Notice) Form' and includes the university logo and name. Below the title is the 'Employee Information Section' which contains several input fields: 'PS EMPLID\*' (marked with a red asterisk), 'Current Status', 'Email Address', 'First Name', 'Middle Initial', and 'Last Name'. At the bottom of the form, there are 'Instructions' that state: 'Please enter the Employee's 9 digit PeopleSoft (PS) Employee ID (EMPLID) and then hit the Tab key.'

After pressing the “Tab” key, the “Current PS Position/Assignment Information Section” will appear, as well as the “New Action Section”.

If the individual that you are submitting the ePAN for has never worked on campus, or is not currently working on campus, this section will remain blank.

If you notice any discrepancies with the information that is pulled from PeopleSoft, please contact your HR Analyst.

The “New Action Section” is where you will indicate the reasoning behind why are you submitting the ePAN.

The first section that you need to select is the “New Employment Type”, which has four options to choose from.

Please note that the only reason why you would utilize the “Faculty” option is if a current faculty member is transitioning into a staff role.

Depending on what category you select for the “Type of Action”, a series of additional fields will auto-populate.

To figure out the new action sequence to select, please refer to the link down below:

[https://www.csusm.edu/hr/epan/type\\_of\\_action\\_sequence.pdf](https://www.csusm.edu/hr/epan/type_of_action_sequence.pdf)

If you select the wrong sequence of actions and try to change them to something else, the OnBase system will not recognize your new changes, and will still operate

**Employee Information Section**

Instructions: Please enter the Employee's 9 digit PeopleSoft (PS) Employee ID (EMPLID) and then hit the 'Tab' key.

1) PS EMPLID *	Current Status	Email Address
555555555		MMOUSE@CSUSM.EDU
First Name	Middle Initial	Last Name
MINNIE		MOUSE

**Current PS Position/Assignment Information Section**

PS Position Information		PS Chartfield Information		
PS Position Number	Job Title	Account	Fund	Dept ID
Time Base (0.0 to 1.0)	Department	Program	Class	Project/Grant
FT Monthly Salary Or Hourly Rate		Skill Level/Grade	Job Code	Pool ID
		FLSA		

**New Action Section**

2) New Employment Type \*

Comment Box (If Needed)

**New Action Section**

2) New Employment Type \*

- Faculty
- MPP
- Staff
- Student Assistant

**New Action Section**

2) New Employment Type \*

Staff

3) Type of Action \*

- Appointment
- Change of Status
- Leaves
- Reinstatement From Leave
- Separation

on the backend according to what you originally selected. If you need to change your sequence of actions, you have to restart the ePAN.

**Depending on what you filled out for the “New Action Section”, the “New PS Position/Assignment Information Section” will appear.**

After entering the “PS Position Number”, the rest of the information should auto-populate. You can indicate any additional info in the “Comment Box”.

**Funding Source Changes:**

Please indicate in the “Comment Box” what departments you are changing funds from.

**Position is Split Funded:**

Please indicated in the “Comment Box” what two departments you are split funding between.

**Student ePANs:** The time base should always be entered as 0.01000.

*If there is a discrepancy between what autopopulated, please contact your department’s HR Analyst. If the position number is typed incorrectly, or does not exist yet, it will not auto-populate the boxes in the “PS Position Info” section.*

**New PS Position/Assignment Information Section**

**Instructions:**  
Please enter the 8 digit PeopleSoft (PS) Position Number and then hit the 'Tab' key.

**6) PS Position Number \***  
00000000

**New PS Position/Assignment Information Section**

**Instructions:**  
Please enter the 8 digit PeopleSoft (PS) Position Number and then hit the 'Tab' key.

**6) PS Position Number \***  
00000000

PS Position Information		PS Chartfield Information		
<b>Job Title</b> ADMIN SUPPORT ASSISTANT 12 MO	<b>MPP Name</b> WALT DISNEY	<b>Account</b> 601300	<b>Fund</b> 48500	<b>Dept ID</b> 1111
<b>Department</b>	<b>MPP Phone</b> 1234	<b>Program</b>	<b>Class</b>	<b>Project/Grant</b>
	<b>Time Base (0.0 to 1.0) *</b> 1.000000	<b>Skill Level/Grade</b> 1	<b>Job Code</b> 1032	<b>Pool ID</b> G01
	<b>FT Monthly Salary Or Hourly Rate *</b> 2,000.00	<b>FLSA</b> N	<b>Job Percentage</b> 100	

This Position is Split Funded

**Comment Box (If Needed)**

If an additional pop-up box appears, this is because there are multiple pay rates associated with the position number you are using.

The columns that you see are identified below from left to right:

- Column 1 – Position Number
- Column 2 – N/A
- Column 3 – Pay Rate
- Column 4 – Employee ID

You will need to match up the Empl ID of the person you are submitting the ePAN for, with the Empl ID listed on the last column of the pop-up box.

*If the corresponding Empl ID does not appear in the box, please contact Human Resources for further troubleshooting.*

**Before submitting the ePAN, you have the option to attach additional documentation or information in the “Attachment Section”.**

As a Submitter, you will have the ability to attach documents in two separate instances:

1. During the ePAN creation stage in the “Forms” function of OnBase.
2. Before you approve the ePAN in the “Workflow” function of OnBase.

*Once you have passed each stage, you cannot delete an already attached document. If needed, click the “Deny” button in “Workflow” to discard the current ePAN and start a new one. Please note that you can only upload attachments one at a time.*

Position Number	Pay Rate	Employee ID	Select
00004111	\$ 11.72		Select
00004111	\$ 10.72		Select
00004111	\$ 11.00		Select
00004111	\$ 12.00		Select
00004111	\$ 12.00		Select
00004111	\$ 12.00	77777777	Select

**Select Keyset**

If an additional pop-up box appears, this is because there are multiple pay rates associated with the position number.

You will need to match up the EMPL ID of the person you are submitting the ePAN for, with the EMPL ID listed in the last column of the pop-up box. For this ePAN, it would be EMPL ID 77777777 for Mickey Mouse.

The columns that you are identified below from left to right:

- \* Column 1 - position number
- \* Column 2 - N/A
- \* Column 3 - Pay Rate
- \* Column 4 - Employee ID

**Attachment Section (Click to Add or View Attachments)**

**Instructions:**  
Upload attachments in appropriate section using PDF format.

**HR Employment Letter**  
Appointment Letters, Salary Approval Letters, Letter of Resignation, etc.  
[Attach Appointment Letters, Salary Approval Letters, Letter of Resignation, etc.](#)

**HR Position Description**  
Applicable signed Position Description  
[Attach Applicable signed Position Description](#)

**HR Work Schedule Forms**  
Applicable signed Work Schedule Forms  
[Attach Applicable signed Work Schedule Forms](#)

**HR ePAN Delegation of Authority**  
Applicable Delegation of Authority in PDF or MSG format  
[Attach Applicable Delegation of Authority in PDF or MSG format](#)

In the bottom left-hand corner of the page, you will see a “Submit” button. Click this after you have reviewed the entire ePAN.

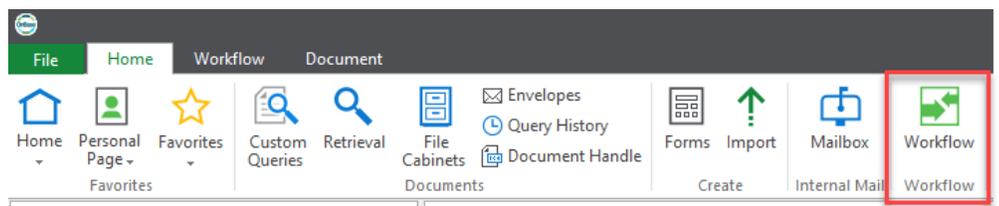
Once you click “Submit”, the ePAN will automatically go to your queue for approval in the “Workflow” function of OnBase.



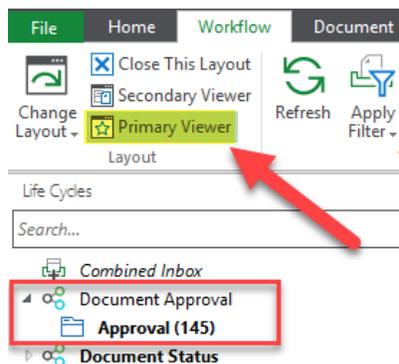
### How to Approve an ePAN

This is when you will be able to approve the ePAN, select any alternate approvers in the signature path (on the divisional level), and add additional attachments before obtaining the rest of the signatures.

In the OnBase ribbon, select the “Workflow” button to begin the approval process.



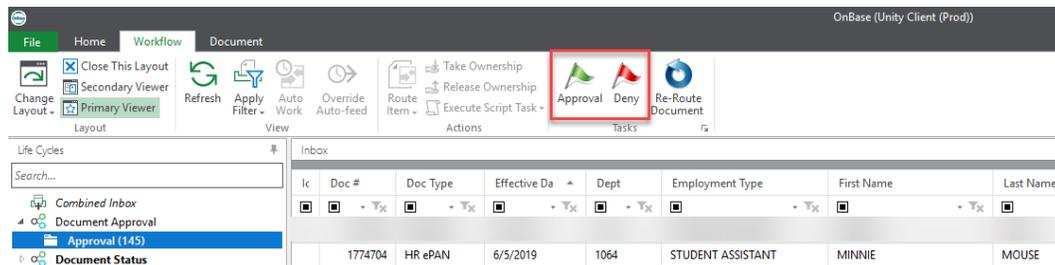
In the toolbar titled “Life Cycles” on the left-hand side, select the triangle to the left of “Document Approval”, and then click on the file folder that says “Approval”.



If you do not select the “Approval” file folder, the options to “Approve” or “Deny” will not appear.

*\*\*Please be sure you have “Primary Viewer” selected. This allows you to view the ePAN properly.\*\**

The ePAN should appear on the right side of the toolbar under “Inbox”.



Please note that your “Approval” and “Deny” buttons will remain greyed out until you click on the ePAN itself.

Once the ePAN is selected, you can scroll, review, approve, or deny the ePAN, as well as change the approval path or attach additional documents.

To scroll and review the ePAN, use the scroll bar within OnBase. To approve the ePAN, click on the "Approve" button at the top of the OnBase ribbon under the "Workflow" tab. To deny an ePAN, click on the "Deny" button at the top of the OnBase ribbon at the top of the OnBase ribbon under the "Workflow" tab.

Please note that if you select the "Deny" button, the ePAN cannot be revived, and must be resubmitted.

To attach documents, you can scroll down to the "Attachment Section" and upload them in their corresponding file format.

Should you attach additional document, you will need to click the "Submit" button to save the changes before selecting the "Approval" button.

**Selecting Alternate Approvers**

If someone is unexpectedly out of the office for an extensive period of time (at least a week), or if delegation of signature approval has been given, you can change the pre-populated individuals in the "Document Approval Path" to an alternate person.

To select an alternate approver, navigate to the "Document Approval Path" of the ePAN, and click on the blue bar.

This will expand the entire signature workflow of the ePAN.

Once expanded, you will see your name as the “Initiator” highlighted, and several individuals after you.

Document Approval Path  
 PLUTO :-SKIP-: WDISNEY :-SKIP-: -SKIP-: -SKIP-: -SKIP-: -SKIP-: -SKIP-: -SKIP-: -SKIP-: DDUCK :-SKIP-: GOOFY

Document Approval Path (Click to show)

<b>Initiator</b> PLUTO	<b>1st Approver</b> -SKIP-	<b>2nd Approver</b> WDISNEY	<b>3rd Approver</b> -SKIP-	<b>4th Approver</b> -SKIP-	<b>5th Approver</b> -SKIP-
Pluto	This step is skipped.	Walt Disney	This step is skipped.	This step is skipped.	This step is skipped.
Alt Initiators	Alt Approvers	Alt Approvers	Alt Approvers	Alt Approvers	Alt Approvers
<b>6th Approver</b> -SKIP-	<b>President Prep</b> -SKIP-	<b>President</b> -SKIP-	<b>Financial Aid</b> -SKIP-	<b>Budget</b> -SKIP-	<b>HR Analyst</b> DDUCK
This step is skipped.	This step is skipped.	This step is skipped.	This step is skipped.	This step is skipped.	Daisy Duck
Alt Approvers	Alt Approvers	Alt Approvers	Alt Approvers	Alt Approvers	Alt Approvers
<b>HR Manager</b> -SKIP-	<b>Payroll</b> GOOFY				
This step is skipped.	Goofy				
Alt Approvers	Alt Approvers				

Navigate to the tan box that displays the individual’s name that you wish to change to an alternate approver, and select the blue button underneath it labeled “Alt Approvers”.

Click on the blue “Select” button next to the name of the person you wish to sign on the behalf of the original individual, and remember to click on the “Submit” button to save the changes before selecting the “Approval” button.

Select Keyset

EPAN FA HR ANALYST	WDISNEY	Walt Disney	Select
EPAN FA HR ANALYST	PPAN	Peter Pan	Select
EPAN FA HR ANALYST	MMOUSE	Mickey Mouse	Select
EPAN FA HR ANALYST	GOOFY	Goofy	Select
EPAN FA HR ANALYST	-SKIP-	This step is skipped.	Select
EPAN FA HR ANALYST	DDUCK	Daisy Duck	Select

If the person you want to have sign on behalf of the original person does not show up on the “Select Keyset” list, contact Human Resources.

**After-the-Fact Selecting Alternate Approvers**

If someone is out of the office after you have already approved the ePAN, you can change to an alternate approver in “Document Status” (see “Tracking your ePAN” section of the manual for navigation), and click on the “Re-Reroute Document” button.

In “Document Status”, find the person you want to replace, click “Alt Approvers”, and select the individual you want to replace the original signer with.

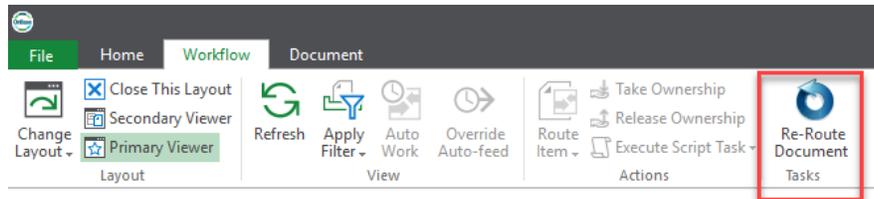
Document Approval Path  
 PLUTO :-SKIPPED-: WDISNEY :-SKIP-: -SKIP-: -SKIP-: -SKIP-: -SKIP-: -SKIP-: -SKIP-: DDUCK :-SKIP-: GOOFY

Document Approval Path (Click to show)

<b>Initiator</b> PLUTO	<b>1st Approver</b> -SKIPPED-	<b>2nd Approver</b> WDISNEY	<b>3rd Approver</b> -SKIP-	<b>4th Approver</b> -SKIP-	<b>5th Approver</b> -SKIP-
Pluto	This step is skipped.	Walt Disney	This step is skipped.	This step is skipped.	This step is skipped.
Alt Initiators	Alt Approvers	Alt Approvers	Alt Approvers	Alt Approvers	Alt Approvers
<b>6th Approver</b> -SKIP-	<b>President Prep</b> -SKIP-	<b>President</b> -SKIP-	<b>Financial Aid</b> -SKIP-	<b>Budget</b> -SKIP-	<b>HR Analyst</b> DDUCK
This step is skipped.	This step is skipped.	This step is skipped.	This step is skipped.	This step is skipped.	Daisy Duck
Alt Approvers	Alt Approvers	Alt Approvers	Alt Approvers	Alt Approvers	Alt Approvers
<b>HR Manager</b> -SKIP-	<b>Payroll</b> GOOFY				
This step is skipped.	Goofy				
Alt Approvers	Alt Approvers				

After clicking the “Submit” button to save your changes, click on the button at the top of the “Workflow” ribbon labled “Re-Reroute Document”.

By clicking on this button, the OnBase system refreshes the data list under the “Document Approval Path” and moves the ePAN from the original person’s queue, to the alternate approver’s queue.

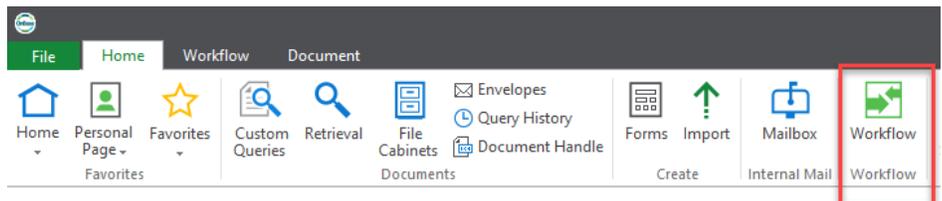


### Tracking your ePAN

#### Document Status Option

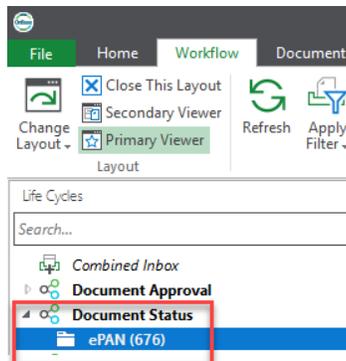
This option can only be used if the ePAN has been submitted and/or approved within the last 60 days. After 60 days, the ePAN is automatically filtered into the “Retrieval” function of OnBase.

In the OnBase ribbon, select the “Workflow” button.



In the toolbar titled “Life Cycles” on the left-hand side, select the triangle to the left of “Document Status”, and then click on the file folder that says “ePAN”.

Depending on your type of OnBase access, you might see more than just the ePANs you submitted.



The ePAN should appear on the right side of the toolbar under “Inbox” – as they did in “Document Approval”.

You can filter the ePANs based on the title listed underneath your “Inbox”.

Icon	Doc Type	First Name	Name Last	PS EMPLID	GEN Current Actionee	PS Effective Date	Document Date	Submitter
Inbox								

After locating the ePAN you wish you review, scroll down to the “Document Approval Path”, and click on the blue bar.

**Document Approval Path**  
 PLUTO : -SKIPPED- : WDISNEY : -SKIP- : DDUCK : -SKIP- : GOOFY

**Document Approval Path (Click to show)**

**Attachment Section (Click to Add or View Attachments)**

**Approver Signature**

**Submit**

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**Document Approval Path**  
 PLUTO : -SKIPPED- : WDISNEY : -SKIP- : DDUCK : -SKIP- : GOOFY

**Document Approval Path (Click to show)**

Initiator	1st Approver	2nd Approver	3rd Approver	4th Approver	5th Approver
PLUTO	-SKIPPED-	WDISNEY	-SKIP-	-SKIP-	-SKIP-
Pluto	This step is skipped.	Walt Disney	This step is skipped.	This step is skipped.	This step is skipped.
<b>Alt Initiators</b>	<b>Alt Approvers</b>				
6th Approver	President Prep	President	Financial Aid	Budget	HR Analyst
-SKIP-	-SKIP-	-SKIP-	-SKIP-	-SKIP-	DDUCK
This step is skipped.	Daisy Duck				
<b>Alt Approvers</b>					
HR Manager	Payroll				
-SKIP-	GOOFY				
This step is skipped.	Goofy				
<b>Alt Approvers</b>	<b>Alt Approvers</b>				

The person’s name that is highlighted in yellow shows you whose queue the ePAN is currently in. The individuals in green mean that they have already approved the ePAN.

**Retrieval Option**

This option can be used to locate any and all ePANs that have been submitted and/or approved since your department started utilizing OnBase.

In the OnBase ribbon, select the “Retrieval” button.

In the “Retrieval” function of OnBase, you can find ePANs by date, name, Empl ID, etc.

On the left-hand side, under the “Document Types and Groups”, use the scroll bar to locate the document type titled “HR ePAN”.

**Document Retrieval**

Document Types and Groups

<All>

- HR Dependent Verification Affidavit
- HR Direct Deposit Form
- HR Disability ID Form
- HR Disciplinary Letter
- HR Employee Action Request
- HR Employee Transfer Data
- HR Employment Letter
- HR Employment Verification
- HR ePAN**
- HR ePAN (Archive Before 6-22-16)
- HR ePAN Attachment - Adobe PDF

Once selected, you will see various filters to look up ePANs under the “Keywords and Date Range”.

Enter the information required for whichever filter you decide to use, and select the “Find” button at the very bottom.

*If you want to search for all ePANs ever submitted, type an asterisk in the “Name Last” filter.*

Your results will appear on the right-hand side of your screen, and you can filter your results by “Name”, “Type”, and “Date”.

To filter, click on the header of what you want to filter by.

## Email Notifications

As a user of OnBase, you may receive automated email notifications from the OnBase system. There are a few different reasons why you may receive these, and they are outlined down below.

**If you are solely a submitter for a certain department (meaning that you do not approve ePANs past the “Initiator” level and are not a backup approver for someone else), you will receive an email notification as soon as you submit an ePAN in the “Forms” button of OnBase. This email notification is sent to inform you that your ePAN is now in your queue to approve under the “Workflow” button of OnBase.**

**Your user group may have requested that you and your backups receive email notifications. This is fairly common in workflows that include any “prep” people for a higher level of authority signature.**

**You can see the people that the message is sent to in the “To:” part of the email in order to help you identify why it may have been sent out.**

**A submitter of an ePAN will always receive a confirmation email as to whether or not the ePAN was fully executed by Payroll Services or denied by an approver on the signature approval path.**

**It is a best practice to open up the OnBase attachment so that you are aware of any added comments by approvers on the ePAN.**



From: [onbase-noreply@csusm.edu](mailto:onbase-noreply@csusm.edu) <onbase-noreply@csusm.edu>  
 Sent: Tuesday, June 4, 2019 2:23 PM  
 To:  
 Subject: HR ePAN DeptID #1111 for MICKEY MOUSE EMPLID 55555555 eff 12/21/2018 (Doc #1234567)

Hello Approval User Group,

HR ePAN DeptID #1111 for MICKEY MOUSE EMPLID 55555555 eff 12/21/2018 (Doc # 1234567) is ready for your review.

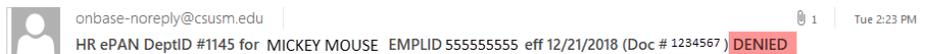
If you are on your primary Windows computer with Microsoft Outlook and OnBase Unity Client installed, please double click on the attachment and open it with OnBase Unity Client and login.

Otherwise, please login to Cougar Apps and then login to the OnBase Unity Client and find Document #1234567.

Please DO NOT respond to this email as this is just a general mailbox account and not checked.

Sincerely,  
 OnBase Admin

From: [onbase-noreply@csusm.edu](mailto:onbase-noreply@csusm.edu) <onbase-noreply@csusm.edu>  
 Sent: Tuesday, June 4, 2019 2:23 PM  
 To: Walt Disney <[wdisney@csusm.edu](mailto:wdisney@csusm.edu)>; Daisy Duck <[dduck@csusm.edu](mailto:dduck@csusm.edu)>; Peter Pan <[ppan@csusm.edu](mailto:ppan@csusm.edu)>  
 Subject: HR ePAN DeptID #1111 for MICKEY MOUSE EMPLID 55555555 eff 12/21/2018 (Doc #1234567)



Hello ePAN Submitter,

The ePAN below has been DENIED. Please review the document for more information.

HR ePAN DeptID #1145 for MICKEY MOUSE EMPLID 55555555 eff 12/21/2018 (Doc # 1234567 ) DENIED

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Sincerely,  
 OnBase Admin



Hello ePAN Submitter,

The ePAN below has been completed. Please review the document for more information.

HR ePAN DeptID #1064 for MICKEY MOUSE EMPLID 55555555 eff 6/15/2019 (Doc # 1234567)

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Sincerely,  
 OnBase Admin