
Troubleshooting OnBase for ePANs

This guide outlines the most common issues users experience when utilizing OnBase.

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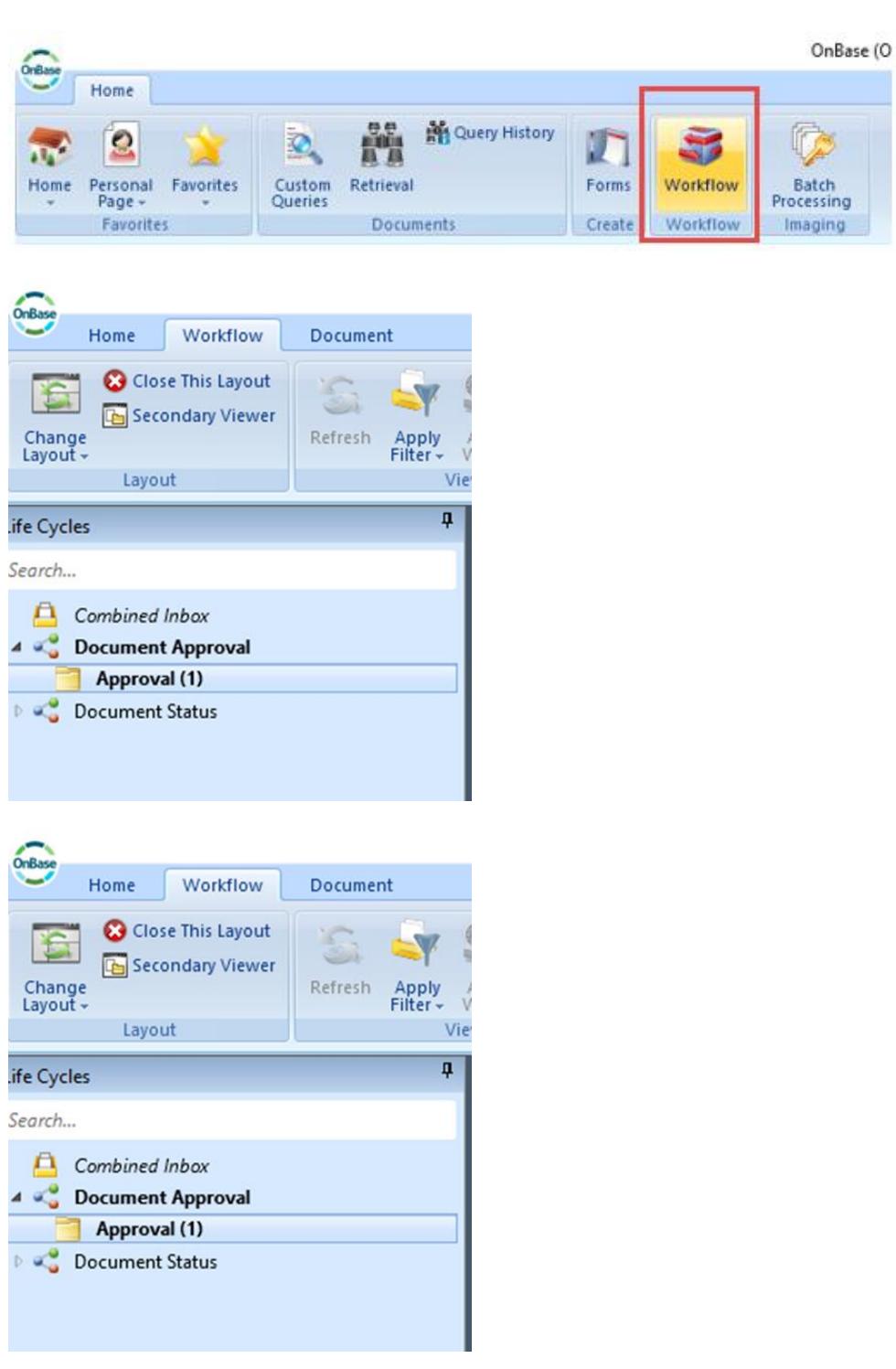
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My Manager Cannot See the ePAN(s) I Submitted.

The two most common things that happen are that submitter of the ePAN has not actually approved the ePAN(s), or the manager is not properly navigating through OnBase to find the ePAN(s).

Double-check that the submitter has approved the ePAN.

Have the submitter go into Document Approval of the Workflow button, and check to see if there are any ePANS needing approval still. If there is a number next to "Approval", then there are ePANS that have not been approved yet.



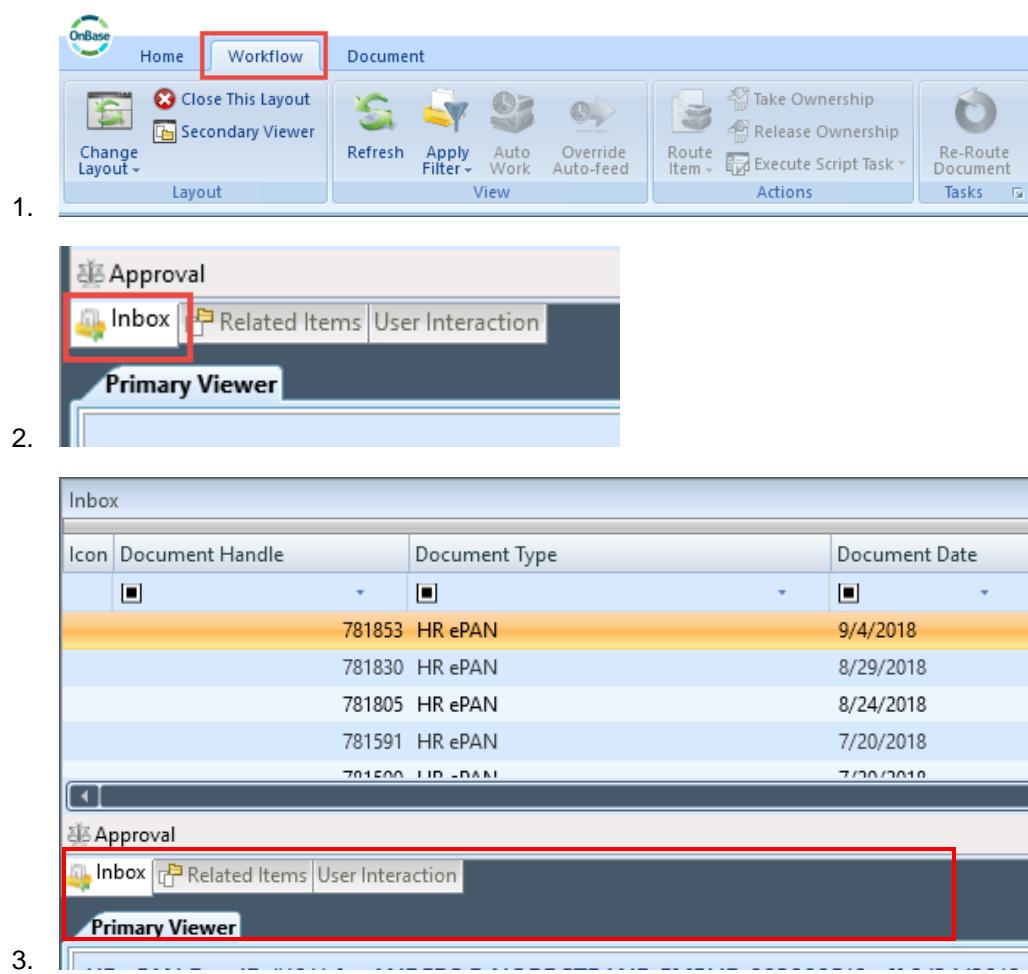
Ensure that the approving manager/person is under "Document Approval" of the Workflow button.

Often times, the manager is looking at "Document Status" versus "Document Approval". Additionally, please ensure that the arrow to the left of "Document Approval" is selected so that it is facing downwards, not upright as shown with the "Document Status" feature.

Doublecheck that the layout of Workflow is correct.

3 Areas to Check:

1. Home Ribbon tabs – Needs to be on **Workflow**
2. Inbox tabs – Needs to be on **Inbox**
3. Hidden divider arrow is being utilized – If you hover your mouse in between the darker blue area of Document Approval, you will notice an up and down arrow symbol appear at one point. Make sure that the user or system has not accidentally dragged this option to hide their inbox.

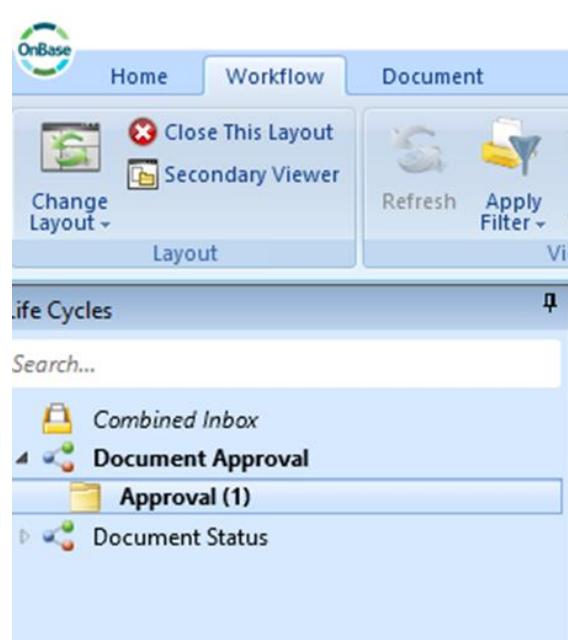


My Manager Cannot Approve the ePAN(s).

This is usually due to a navigation discrepancy, or a missing step to a reroute action.

Ensure that the approving manager/person is under “Document Approval” of the Workflow button.

Often times, the manager is looking at “Document Status” versus “Document Approval”. Additionally, please ensure that the arrow to the left of “Document Approval” is selected so that it is facing downwards, not upright as shown with the “Document Status” feature.



Ensure that the approving manager/person is clicking on the actual ePAN in order to get the Approval and Deny flags to appear.

You will know when the ePAN is clicked on because it will change from a light blue to an orange color, and the Approval and Deny flags will no longer be greyed out.

ePAN is Not Clicked On:

The screenshot shows the OnBase ribbon with the 'Workflow' tab selected. In the 'Actions' section, the 'Approval' and 'Deny' buttons are highlighted with a red box, indicating they are inactive. Below the ribbon, the 'Life Cycles' pane shows a tree structure with 'Document Approval' expanded, and the 'Approval (1)' node is selected. The 'Inbox' pane displays a single item with the document type 'ePAN'. The 'Approval' and 'Deny' icons in the inbox row are also greyed out.

ePAN is Clicked On:

This screenshot shows the same OnBase interface after the ePAN was clicked. The 'Approval' and 'Deny' buttons in the ribbon's 'Actions' section are now in their active colors (green and red). The 'Approval' button is highlighted with a red box. The 'Inbox' pane now shows the document handle '781853 HR ePAN'. The 'Approval' and 'Deny' icons in the inbox row are now active and colored green and red respectively.

Doublecheck that the layout of Workflow is correct.

3 Areas to Check:

1. Home Ribbon tabs – Needs to be on **Workflow**
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The block contains three numbered screenshots labeled 1, 2, and 3, each showing a different view of the OnBase interface to demonstrate the correct layout of the workflow tabs.

- Screenshot 1:** Shows the ribbon with the 'Workflow' tab highlighted (red box). Below the ribbon, the 'Primary Viewer' window shows the 'Approval' tab selected. The 'Inbox' tab is highlighted with a red box.
- Screenshot 2:** Shows the 'Inbox' pane with several items listed. The 'Primary Viewer' window below shows the 'Approval' tab selected. The 'Inbox' tab is highlighted with a red box.
- Screenshot 3:** Shows the 'Approval' window with the 'Primary Viewer' below it. The 'Inbox' tab is highlighted with a red box.

Sometimes, a submitter will reroute an ePAN to another approvers queue. There are a variety of reasons why this may be needed, however, if the submitter does not save their changes and press the “Re-Route Document” button, the rerouting of the ePAN will not be successfully executed.

Refer to the **After-the-Fact Selecting Alternate Approvers** section of the ePAN Manual to ensure successful execution of the reroute.

What is the Status of my ePAN(s)?

You can see in real time where your ePAN(s) are at by looking at the “Document Status” feature in Workflow. Please refer to the “**Tracking your ePAN**” section of the ePAN Manual for instructions on how to do this.

Can I Print my ePAN(s)?

No, but you can save it in alternate formats. Please refer to the “**Saving’ ePANs**” section of the ePAN Manual for instructions on how to do this.

I Am Unable to Access OnBase with my Computer/Laptop

If you are trying to launch OnBase from your laptop (or computer that is connected to a laptop), and the app only has a spinning circle, there is likely an issue with your connection. This typically stems from the fact that your computer or laptop is trying to connect to the program wirelessly instead of using a wired connection. To fix this, you can turn off wireless on your laptop when it is connected to a network cable. IITS does not allow OnBase to connect wirelessly, even if you are on campus. For all wireless connections, including off campus, you will need to use CougarApps. Please refer to the “**Accessing OnBase via CougarApps**” section of the ePAN Manual for instructions on how to access OnBase via CougarApps.

I'm Trying to Log into CougarApps, but I Don't See a Login Page

This is a browser caching issue. You will need to clear your browser cache and cookies. If you do not want to do that, you can use “Incognito Mode” in Chrome, or “Private Browsing” in Firefox.