**OnBase Task Request Form**

Request for Task to be Completed

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| OnBase Department/Group? | HR | Admissions | | | Financial Aid | | | | Registrar | | | TR # | |
| OnBase Area to be changed or created | Keywords | Document | | | Queries | | Users | | | | Workflow | | Security Group |
| Modification to and existing Process/Item? (required) | Custom Query | | Workflow | | | Document | | | | Other? | | | |
| What to do?  (required) |  | | | | | | | | | | | | |
| Reason for the change? (required) |  | | | | | | | | | | | | |
| Business Impact?  (required) |  | | | | | | | | | | | | |
| Priority? (required)  1 = Low, 2 = Medium, 3 = High |  | | | Suggested Completion Date? | | | |  | | | | | |

**Contact Information (Required)**

|  |  |  |  |
| --- | --- | --- | --- |
| Requested By: |  | Requested Date: |  |
| Campus: |  | Department: |  |
| Telephone Number: |  | Email Address: |  |

Common Autoname Strings Per Document Type Group in order they show up in the autoname string

|  |  |  |
| --- | --- | --- |
|  | AD Documents | Status – UAID – ReceivingCampus – DocumentType – NameLast, NameFirst – DOB – DocumentDate |
|  | FA Documents | Status – AidYear - UAID – ReceivingCampus – DocumentType – NameLast, NameFirst – DOB – DocumentDate |
|  | RO Documents | Status – UAID – ReceivingCampus – DocumentType – NameLast, NameFirst – DOB – DocumentDate |
|  | RO Departmental Documents | Term - ReceivingCampus – DocumentType - DocumentDate |
|  | HR Documents | UAID – ReceivingCampus – Document Type – NameLast, NameFirst NameMiddle – DocumentDate |

|  |  |
| --- | --- |
| Other keywords you would like in the autoname string? If so please write them in the correct order. |  |

Common Keywords Per Document Type Group and in order they show up in the keywords box

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Common AD Keywords: | UAID  ReceivingCampus  SSN  NameLast  NameFirst  NameMiddle  DOB  ProcessingStatus  Visa Type  PIDM  Term  Status  ADtoRO | Common FA Keywords: | UniqueID  ReceivingCampus  AidYear  UAID  SSN  NameLast  NameFirst  NameMiddle  DOB  PIDM  FafsaReceivedUAA  FafsaReceivedUAF  FafsaReceivedUAS  ProcessingStatus  DueDate  Status | Common RO Keywords: | UAID  ReceivingCampus  SSN  NameLast  NameFirst  NameMiddle  DOB  VisaType  PIDM  ProcessingStatus  ROTeam  Confidentiality  Status | Common RO Departmental Keywords: | RecievingCampus  PorcessingStatus  ROTeam  Status |

Other Keywords needing to be added to a specific Document Type

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | ABA |  | College |  | File Name |  | Mail Subject |  | ROTeam |
|  | AcademicYear |  | Comm Type |  | Functional Area |  | Mail To |  | Section |
|  | Account # |  | Confidentiality |  | I9 Date |  | Mail To Address |  | Security Type |
|  | ADecision |  | Consultant assigned |  | IDecision |  | NameFirst Alt1 |  | Site ID |
|  | ADecisionBy |  | CorresType |  | IDecisionBy |  | NameFirst Alt 2 |  | Start Column |
|  | ADecisionDate |  | Create Profile |  | IDecisionDate |  | NameLast Alt 1 |  | Statement Cycle Date |
|  | Advisor |  | Created By |  | Identification # |  | NameLast Alt 2 |  | Stub Amount |
|  | Amount |  | Created Date |  | Institution # |  | NameMiddle Alt 1 |  | Student Type |
|  | ApplicationSource |  | CRN |  | Internal Chart # |  | NameMiddle Alt 2 |  | Subject |
|  | ApplicationStatus |  | Crse# |  | Invoice # |  | Null Keytype |  | Termination Year |
|  | Articulation |  | Date |  | IS Batch # |  | Pay Period |  | TimeStamp |
|  | ArticulationStatus |  | Date Updated |  | Legal Type |  | Petition Type |  | Title |
|  | Authentication |  | DB Version |  | Level |  | PO # |  | TitleVType |
|  | Author |  | DegreeAuditStatus |  | LevelCode |  | Policy # |  | TR # |
|  | Batch # |  | Department |  | Mail Attachment Count |  | PreBanner |  | Transaction # |
|  | Batch Amount |  | Description |  | Mail Attachment Name |  | ProcessbyExpGradTerm |  | Transaction Code |
|  | Batch Number |  | Destination Directory |  | Mail Bcc |  | Program |  | TranscriptType |
|  | Build Version |  | Document Handle |  | Mail Cc |  | ReadyToVerify |  | Type |
|  | Calendar Year |  | DueDate |  | Mail Cc Address |  | Recommendation |  | UAScholar |
|  | CARStatus |  | Effective Date |  | Mail Certified |  | RecommendationBy |  | Union Code |
|  | CARType |  | Enclosure Count |  | Mail Date |  | RecommendationDate |  | Vender # |
|  | Chapter |  | End Column |  | Mail From |  | Regulation # |  | Vendor Name |
|  | Check # |  | EPC |  | Mail From Address |  | RequestType |  | VerificationBy |
|  | Check Amount |  | Exception Code |  | Mail MessageID |  | Reservation Number |  | VerificationComplete |
|  | Check Consecutive# |  | Exception Reason |  | Mail Return Path |  | ReviewedBy |  | VerificationDate |
|  | CheckSequence# |  | ExpGradTerm |  | Mail State |  | ReviewedDate |  | WithdrawlType |
|  | CheckSerial # |  | Fax Unique ID |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |

Custom Queries available for document types to be added to for retrieval

|  |  |
| --- | --- |
|  | AD Filter By Appl Source & Receiving Campus = Enter the Application Source, Receiving Campus, Date Range or Term to view AD Application UG and AD Application GR documents |
|  | Alt Search for Student File = Enter the appropriate information to locate the student’s file: After locating the student file you will be able to sort by keywords |
|  | HR Timesheets filter = search for HR Time Sheets |
|  | RO CUR Filter = Search for RO Curriculum Action Request |
|  | Search for Student File = Searches for the student file includes only AD and RO documents |
|  | Search for Student File AD FA RO = Searches for the student file includes AD RO and FA documents |

To create a new custom query please explain what you want to happen and the keywords you would like to be able to search on along with the document types you would like to have included in the new custom query.

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Scan Queues

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | AD (Processed) (UAA) |  | FA (Processed) (UAA) |  | RIM (Processed)(SW) |
|  | AD (Processed) (UAF) |  | FA (Processed) (UAF) |  | RO (Processed) (UAA) |
|  | AD (Processed) (UAS) |  | FA (Processed) (UAS) |  | RO (Processed) (UAF) |
|  | AD (UAA) |  | FA (UAA) |  | RO (Processed) (UAS) |
|  | AD (UAF) |  | FA (UAF) |  | RO (UAA) |
|  | AD (UAS) |  | FA (UAS) |  | RO (UAF) |
|  | EM (Processed)(UAA) |  | HR (Processed)(SW) |  | RO (UAS) |
|  | EM (Processed)(UAF) |  | HR (Processed)(UAA) |  |  |
|  | EM (Processed)(UAS) |  | HR (Processed)(UAF) |  |  |
|  |  |  | HR (Processed)(UAF­\_GI) |  |  |

Common User Groups Per Document Type Group

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Common AD User Groups: | ad\_manager  ad\_specialist  ad\_view  admin\_administrator  admin\_develop  em\_global\_view\_admin  em\_global\_view\_basic  em\_scan\_adro\_uaa  em\_scan\_adro\_uaf  em\_scan\_adro\_uas  ro\_manager  ro\_specialist  ro\_view  transfer\_manager  transfer\_specialist | Common FA User Groups: | admin\_administrator  admin\_develop  em\_global\_view\_admin  em\_global\_view\_basic  em\_scan\_fa\_uaa  em\_scan\_fa\_uaf  em\_scan\_fa\_uas  fa\_manager  fa\_specialist | Common RO User Groups: | ad\_manager  ad\_specialist  ad\_view  admin\_administrator  admin\_develop  em\_global\_view\_admin  em\_global\_view\_basic  em\_scan\_adro\_uaa  em\_scan\_adro\_uaf  em\_scan\_adro\_uas  ro\_manager  ro\_specialist  ro\_view  transfer\_manager  transfer\_specialist | Common RO Departmental User Groups: | ad\_manager  ad\_specialist  ad\_view  admin\_administrator  admin\_develop  em\_global\_view\_admin  em\_global\_view\_basic  em\_scan\_adro\_uaa  em\_scan\_adro\_uaf  em\_scan\_adro\_uas  ro\_manager  ro\_specialist  ro\_view  transfer\_manager  transfer\_specialist |

OnBase User Groups available for request

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | ad\_confidential |  | dept\_review\_uaa\_engr |  | hr\_administrator |  | international\_review |
|  | ad\_manager |  | dept\_review\_uaf\_cem |  | hr\_concurrent\_license |  | mau\_printing |
|  | ad\_specialist |  | dept\_review\_uaf\_cla |  | hr\_pay\_index\_sw |  | mau\_redact |
|  | ad\_view |  | dept\_review\_uaf\_cnsm |  | hr\_pay\_index\_uaa |  | residency\_processing |
|  | admin\_administrator |  | dept\_review\_uaf\_crcd |  | hr\_pay\_index\_uaf |  | rim\_staff |
|  | admin\_develop |  | dept\_review\_uaf\_inds |  | hr\_pay\_index\_uaf\_gi |  | rim\_view |
|  | admin\_document |  | dept\_review\_uaf\_sfos |  | hr\_pay\_index\_uas |  | ro\_confidential |
|  | admin\_exception |  | dept\_review\_uaf\_snras |  | hr\_pay\_manager |  | ro\_manager |
|  | admin\_keyword |  | dept\_review\_uaf\_soe |  | hr\_pay\_review\_sw |  | ro\_specialist |
|  | admin\_printing |  | dept\_review\_uaf\_som |  | hr\_pay\_review\_uaa |  | ro\_view |
|  | admin\_process |  | dept\_review\_uas\_bpa |  | hr\_pay\_review\_uaf |  | sw\_helpdesk |
|  | admin\_query |  | dept\_review\_uas\_cas |  | hr\_pay\_review\_uaf\_gi |  | tech\_support |
|  | admin\_scanning |  | dept\_review\_uas\_cte |  | hr\_pay\_review\_uas |  | transfer\_manager |
|  | admin\_security |  | dept\_review\_uas\_hs |  | hr\_pay\_scan\_sw |  | transfer\_specialist |
|  | admin\_sys |  | dept\_review\_uas\_voct |  | hr\_pay\_scan\_uaa |  | uaa |
|  | admin\_workflow |  | em\_concurrent\_license |  | hr\_pay\_scan\_uaf |  | uaf |
|  | dept\_em\_uaa\_admin |  | em\_global\_view\_admin |  | hr\_pay\_scan\_uaf\_gi |  | uas |
|  | dept\_em\_uaa\_director |  | em\_global\_view\_basic |  | hr\_pay\_scan\_uas |  |  |
|  | dept\_em\_uaa\_security\_admin |  | em\_scan\_adro\_uaa |  | hr\_pers\_index\_sw |  |  |
|  | dept\_em\_uaf\_admin |  | em\_scan\_adro\_uaf |  | hr\_pers\_index\_uaa |  |  |
|  | dept\_em\_uaf\_director |  | em\_scan\_adro\_uas |  | hr\_pers\_index\_uaf |  |  |
|  | dept\_em\_uaf\_security\_admin |  | em\_scan\_fa\_uaa |  | hr\_pers\_index\_uaf\_gi |  |  |
|  | dept\_em\_uas\_admin |  | em\_scan\_fa\_uaf |  | hr\_pers\_index\_uas |  |  |
|  | dept\_em\_uas\_director |  | em\_scan\_fa\_uas |  | hr\_pers\_manager |  |  |
|  | dept\_em\_uas\_security\_admin |  | fa\_appeal |  | hr\_pers\_review\_sw |  |  |
|  | dept\_review\_uaa\_cas |  | fa\_manager |  | hr\_pers\_review\_uaa |  |  |
|  | dept\_review\_uaa\_chsw |  | fa\_specialist |  | hr\_pers\_review\_uaf |  |  |
|  | dept\_review\_uaa\_coe |  | Fa\_view\_bo |  | hr\_pers\_review\_uaf\_gi |  |  |
|  | dept\_review\_uaa\_cpbb |  | grad\_school\_review |  | hr\_pers\_review\_uas |  |  |
|  | dept\_review\_uaa\_ctc |  |  |  |  |  |  |

OnBase Workflows and Queues

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Workflow | Queue |  | Workflow | Queue |  | Workflow | Queue |
|  | AD Change of Major |  |  | AD Transfer to RO |  |  | RO Processing |  |
|  |  | ADCM Processing |  |  |  |  |  | ROP Registration |
|  |  |  |  | FA Processing |  |  |  | ROP Records |
|  | AD Dept/Grad Review |  |  |  | FAP Verification |  |  | ROP Transcript Request |
|  |  | ADDG UG Dept Review |  |  | FAP Business Office |  |  | ROP Correspondence |
|  |  | ADDG GRAD DEPT Review |  |  | FAP C-Flag |  |  | ROP Publications/Scheduling |
|  |  | ADDG Dean Review |  |  | FAP Loan |  |  | ROP Registrar |
|  |  |  |  |  | FAP Forecast |  |  |  |
|  | AD Intl Advisor |  |  |  | FAP Other |  | Transfer Credit Evaluation |  |
|  |  | ADIA Review |  |  | FAP Professional Judgment |  |  | ROT Evaluation (New) |
|  |  |  |  |  | FAP Scholarship |  |  | ROT Evaluation (Continuing) |
|  | AD Processing |  |  |  | FAP Veterans |  |  |  |
|  |  | ADP Processing |  |  | FAP Summer |  |  |  |
|  |  | ADP Application Processing |  |  | FAP Hold |  |  |  |
|  |  | ADP Mail Out |  |  |  |  |  |  |
|  |  | ADP NOB |  | RO Graduation |  |  |  |  |
|  |  | ADP Residency Approval |  |  | ROG Processing |  |  |  |
|  |  | ADP Manager |  |  | ROG Awaiting Graduation |  |  |  |
|  |  |  |  |  | RPG Review |  |  |  |
|  | AD Review |  |  |  | ROG Audit Complete |  |  |  |
|  |  | ADR Review |  |  | ROG Audit Incomplete |  |  |  |
|  |  | ADR Correction |  |  | ROG Incoming Mail |  |  |  |
|  |  | ADR Data Entry |  |  | ROG Petition |  |  |  |