OnBase Instruction Guide – Supervisor Review

- 1. Log onto OnBase web version at **docs.erp.ufl.edu** using your Gatorlink credentials.
- 2. Select the **Document Retrieval** icon, in the top left corner.

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AMS PROPERTY UPDATE DOCUMENTS	~ ^	
AMS Book-Software Inventory		
AMS Foreign Travel Request		
AMS Inaccessible Inventory		
AMS Misc - PUD		
AMS Off-Campus Property Cert		
AMS Property Update Document		
AMS Report of Survey		
AMS Report of Survey - Lost or Stole	n	
AMS Report of Transfer		
AMS Surplus Pickup		
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COM-PA Admissions Upload Form		
IS PURCHASING DOCUMENTS	▼	
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3. Click **Open Workflow** – a new window will open.

Document Retrieval	OnBase			
DOCUMENT	Document Types			
Document Retrieval	<u>Q</u>			
Custom Queries	AMS PROPERTY UPDATE DOCUMENTS			
New Form	AMS Book-Software Inventory AMS Foreign Travel Request			
Import Document	AMS Inaccessible Inventory			
Documents Checked Out	AMS Misc - PUD AMS Off-Campus Property Cert			
WORKFLOW	AMS Property Update Document AMS Report of Survey			
Open Workflow	AMS Report of Survey - Lost or Stolen			
STATUSVIEW	AMS Surplus Pickup			
Open StatusView	COM-PA UPLOADS			
FOLDERS	COM-PA Admissions Upload Form DIS PURCHASING DOCUMENTS			
Open Folders	0 SELECTED			
USER	Document Date			
Mailbox				
Envelopes	Search Type			
Locked Objects	KEYWORDS TEXT NOTES			

4. In Life Cycle View, click the arrow next to ECE Faculty LC. Then select Supervisor Review folder.

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CFO Division Jo Program WF	ob Shadowing	CUMMINGS		NEW HIRE	OPS	ALLISON	IVAK
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V of ECE Faculty LC Supervisor	Review						
Current Em	ployees	4					Þ
🛅 Past Emplo	oyees	Items: 2					
> 🖧 ECE LOA LC	-	Cancel Cancel for Approvals					

5. Search by: ECE Supervisor Last Name, Proxy Last Name, Student Name etc. to find the appropriate form.

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ECE - SUPERVISOR LAST NA PROXY LAST	HIRE TYPE	POSITION TYPE	STUDENT FIRST	LAST NAME
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6. Select the employee name and edit fields in the form as applicable underneath. Then click **Submit** at the end of the form to save your changes.

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Student								
Please enter the st	tudent's UFID a	and hit tab to populat	e the remaining ⁽	fields.				
UFID*	Last Name		First Name		Email			
94826105	AMIRISETTI		SAI PRANESH		S.AMIRISETTI@UFL	L.EDU		
Employment Deta	ails							

- 7. **Resubmit for Approvals,** select the employee name then click the **Resubmit for Approval** button. The form will exit the supervisor review folder and a confirmation email will be generated.
- 8. **Cancel Request**, select the employee name then click **Cancel Request** button. The form will exit the supervisor review folder and a confirmation email will be generated.

a. NOTE: Forms cancelled in the supervisor review folder will enable forms in the Current Employee folder to be reassigned (i.e. reappoint or terminate).

Reminders:

- The Supervisor Review module are for appointment forms that were denied by either the Payroll & Personnel or Contracts & Grants Offices.
- As a supervisor, you have the option to either resubmit the form for approvals or cancel the request completely.
- 4 The Department Associate Chair will resubmit or cancel forms related to TA's and UPI graders.
- 4 You should only edit, resubmit, or cancel forms assigned to you excluding TA's and UPI graders.
- Review your forms and respond promptly.