

FREQUENTLY ASKED QUESTIONS

- **OnBase is accessible on and off campus so it does not require the use of VPN.**
- **Access Requests**
 - If a user needs access to OnBase, forms, documents, workflows, etc. their supervisor will need to submit a request to their DACOS Admin/Custodian who will then submit a proper User Authorization Request. Supervisors can make requests by submitting the OnBase form called “DACO User Access Request Form”.
- **Logging In**
 - The username is FIRST.LAST and defaults to all caps when manually entering it.
 - If a user cannot log in
 - It could be that they locked their account by too many failed attempts
 - It could be that their account was locked due to not logging in for an extended period of time
 - To unlock
 - Assign to OEM to troubleshoot and unlock the OnBase account
- **Unity Client is not installed on a user’s school issued machine**
 - This should be rare now that it is included in all the images, but if it happens, Client Services can push it to the user’s machine.
 - Employees without a school issued computers cannot use the Unity Client.
 - Employees that use an Apple/Mac cannot use the Unity Client.
- **User cannot see documents, forms, workflows they expect to see**
 - Make sure they are looking in the proper places. Otherwise it could be an access issue which can be sent to OEM for troubleshooting.
- **Unity Client Workflow display issues**
 - Changing the layout and viewers can cause people not to see their forms in workflow. Refer to the workflow section below to manage layouts and viewer.
- **Web Client issues**
 - Make sure pop-ups are not being blocked.
 - Sometimes windows pop-up in the background behind the main viewer. Hover over the browser icon in the task bar to see if a new window is displayed and select it. If there is a new window and it doesn’t display as expected, it could be off screen. Sometimes users have multiple monitors, or move stuff off screen and it has trouble displaying correctly.
 - This scenario should be rare now, but they may be getting Active X controls issues. Note if something prompts to install after they login. If they have Active X issues, OEM can troubleshoot accordingly.
 - Specific to workflow
 - Changing the layout and viewers can cause people not to see their forms in workflow. Refer to the workflow section below to manage layouts and viewer.
- **Questions about specific forms and workflows**
 - If they need help accessing a form or workflow, make sure they are looking in the right spots. If it is an access issue, submit to OEM for review and troubleshooting.
 - For users completing the form or providing approvals, direct them to the form/workflow owner. They should know who this is.
 - These questions usually involve how to fill out a form, or trying to provide wrong values, etc. The form/workflow owner should be able to direct the users.
 - For form/workflow owners, direct them to OEM for review and troubleshooting.
- **Thick Clients (also known as Scan Stations) and Mobile Clients (apps for iPads – limited to Cabinet Members)**
 - Submit to OEM for review and troubleshooting

- **Students using OnBase forms**
 - There are some forms built for student use. Most times the form requires them to enter in enough identifying information to verify their identity and pull in pieces of their information. If a student cannot use a form, it is usually intentional and they should have received a message stating who to contact. Usually the Navigation Station can work with the student to determine what they are missing that is preventing them from using a form.