

“Securing Access to OnBase” Transcript

Intro

OnBase is a document management system that will begin to replace our current system known as Optidoc/WebIT.

OnBase eliminates the need for the use of barcodes to submit supporting documentation for our three Oracle finance documents: Payment Requests, Purchase Order Requisitions and GL Journal Entries.

Although the elimination of barcodes is exciting, there is one thing that you need to be aware of: access to OnBase will be **required** in order to submit supporting or backup documentation for the Oracle finance documents. Access to OnBase will also be required if you are an approver of these documents and you want to view the supporting documentation.

For some employees, access to OnBase will be automatically granted when the system goes live.

Employees who will be granted access are those who fall in one of the following groups:

1. Employees who currently have access to Optidoc/WebIT
2. Employees who don't currently have access to Optidoc/WebIT, but have created a financial document in Oracle (Payment Request, Purchase Order Requisition and GL Journal Entry) within the last 18 months
3. Employees who have approved financial documents in Oracle within the last 18 months.

If you fall within one of these three groups, you will have access to OnBase. There is nothing that you will need to do when the system goes live other than to log in and use the system.

Everyone that will have access to OnBase will be assigned the UAB OnBase FN Campus Access responsibility in Oracle. Keep in mind that this responsibility **does not** have any menu options tied to it; it's only purpose is to denote your access to OnBase.

If you do not identify with any of these three groups, or if you are an administrator who has employees that does not fall within these three groups, then you or your employee(s) will need to have access to OnBase **requested. You cannot request access to OnBase for yourself.**

Concerning access, it is important to note that, like some other responsibilities in Oracle, the access to the system will follow the employee. That means that if the employee is terminated (leaves UAB) then the access to OnBase will also be terminated as well. In the case of employee transfers, access to OnBase will be terminated until the employee's new department requests access to OnBase for them again.

Requesting Access to OnBase

A department administrator can request access to OnBase for their employees using the Access Control Form (ACF) in Oracle. This form is found in the following responsibilities: UAB GA End User, UAB GL End User and UAB HR Officer.

Requesting access to OnBase is pretty easy. Here's how to do it in less than 10 steps:

1. When the ACF form appears, the employee's information must be entered. Enter either the employee's name (last name first), their seven digit employee ID number or their Blazer ID.
2. Click on the Find button.
3. When the employee details appears, click on the Finance tab at the bottom of the form.
4. Under Requested Changes, click on the drop-down menu and then select the *UAB OnBase FN Campus Access* responsibility.
5. Click on Add Row.
6. The responsibility name, along with the current day's date will appear under the Requested Changes section. Click on the Submit button.
After submission, the document status will be listed as INPROCESS. Once the approval process is completed, the responsibility will then be added to the employee's homepage in Oracle.

After being granted access to OnBase, you then are able to upload and import supporting documentation for your Payment Requests, Purchase Order Requisitions and/or your GL Journal Entries.

This completes the how-to video for Securing Access to OnBase. To learn more about OnBase for UAB, visit our website at go.uab.edu/onbase. If you have any questions, email Financial Affairs Training at fa-train@uab.edu.