Note: We strive to make ideal example solutions of how customers can leverage OnBase. The solutions provided here are strictly demonstration examples and are not intended to be used in a production implementation. Hyland provides no warranty or support on demonstration solutions used in production environments.
General Information

This document is intended to help in guiding an end user through the Employee System Tracking HR Solution. This solution is composed with WorkView, Workflow, and the Unity Client. This document will explain how the system works from an end user's point of view.

Table of Contents

General Information ........................................................................................................................................ 2
Accessing the Application ............................................................................................................................. 3
Onboarding Process ...................................................................................................................................... 4
Name Change Process ................................................................................................................................... 8
Promotion/Transfer ....................................................................................................................................... 9
Separation ....................................................................................................................................................... 11
Accessing the Application

Open the Unity Client

1. Double Click on the Unity Client Icon

2. Enter the credentials UserName: Manager
   Password: password
3. Select the OnBase Jewel in the upper right hand corner of the Client.
4. Click on Applications -> Employee System Tracking

Application Overview

Onboarding Process
To kick off the onboarding process the HR Generalist will create an Employee System Tracking Form. In order to create the form:

1. Click on the Forms button in the home ribbon

2. Select the Employee System Request form from the list.

3. Complete the Employee System Request
   **Required fields have a red asterisk next to them**
4. Once the form is submitted an Employee Record will be created in the Application. Navigate to the application.

5. Expand the Employee Filter Bar, and Select the employee created.

6. Once on the Employee Record the HR Generalist can Review the systems that have been assigned to the Employee.

7. The HR Generalist can also Add or Remove any systems that have been assigned or need to be assigned by clicking the **Green Plus (Add)** or **Red X (Remove)**
8. Once the HR Generalist is comfortable with the assigned system, they can send the Employee Record to the Hiring Manager for Review.
   a. Click on the Task tab in the ribbon
   b. Select *Send to Hiring Manager for Review*

**Hiring Manager Review**

The Hiring Manager will receive an email that they have a new hire record to review. The Notification will supply a hyperlink to the New Hire Object.

**NOTE:** When demoing this from *Try.OnBase* you will not receive a notification

The Hiring Manager will review the New Hire Object and make any necessary changes to the system, then accept the changes and send the new hire object back to the HR Generalist.
   a. Click on the Task tab in the ribbon
   b. Select *Accept Systems*.

**HR Generalist Kick-off Work**

The HR Generalist will get an email stating the systems have been accepted from the Hiring Manager, and that they may move the new hire forward in the process. The notification will supply a hyperlink to the new hire object.

**NOTE:** When demoing this from *Try.OnBase* you will not receive a notification

In order to move the new hire forward in the process the HR generalist must.
   a. Click on the Task tab in the ribbon
   b. Select *Generate System Task to HR Technical Support*
   c. Before the system tasks are generated a prompt will ask the HR generalist if they are sure that they want to move forward in the process.
HR Technical Support

HR Technical Support department will get a notification stating that System task have been assigned to them. The email will supply hyperlinks to the object for the System admin to start directly working on them.

Hello,

The following System Task have been created for you to work on. Please log into OnBase and complete the following Onboarding System Tasks.

Symitar Mirror: PHIL WATERS

<table>
<thead>
<tr>
<th>System Name</th>
<th>System Admin</th>
<th>System Action</th>
<th>Object Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active Directory</td>
<td>Cindy Smith</td>
<td>Add</td>
<td>Active Directory Task</td>
</tr>
<tr>
<td>Helpstar Access</td>
<td>Rega Nam</td>
<td>Add</td>
<td>Helpstar Access Task</td>
</tr>
<tr>
<td>iPad</td>
<td>Rega Nam</td>
<td>Add</td>
<td>iPad Task</td>
</tr>
<tr>
<td>Symitar Access</td>
<td>Rega Nam</td>
<td>Add</td>
<td>Symitar Access Task</td>
</tr>
</tbody>
</table>

The System Admin can click on the hyperlink to directly go to the working System Task.

NOTE: When demoing this from Try.OnBase you will not receive a notification

Once the System Admin completes the task of adding the employee to the System they can complete the task by:

a. Click on the Task tab in the ribbon

b. Select Complete Onboarding Task

**Note: Once the HR Technical Support group completes the Active Directory System Task, all of the other system task will be generated for the other departments. These departments will go through the same process. **
Auditor

Once all Departments complete their System Tasks, the new hire object will be sent to an audit group for review of the new hire object.

The Audit user group will get a notification that the new hire object is ready for review.

After the new hire has been completely Onboard, HR will have new options to send the Employee through another process. The options now available to the HR users are:

1. **Change Employee Name**
2. **Promotion/Transfer**
3. **Employee Separation**

Name Change Process

The employee name change process has two different options.

1. The HR user can change the Employees name and send out all system tasks to the appropriate departments.
2. The HR user can change the employee’s cubical and the system will only send out system tasks which involve a seat change.

In order to start the process the HR user must:

1. Click on the Task tab in the ribbon
2. Select *Change Employee Name*
3. Select the type of change being applied.
4. Selecting the **Name Change** will prompt the user to enter the new name:

![User Interaction](Image)

5. Once the new name is entered an email will be sent to the assigned departments of the systems that belong to the employee.

6. Selecting the **Cubical Change** will prompt the user to enter the new workstation location:

![User Interaction](Image)

7. Once the new workstation is entered an email will be sent to the assigned departments of the systems that belong to the employee that are involved with cubical changes.

**Promotion/Transfer**

When an employee is promoted or transferred, they will need to be assigned to new systems and removed from old systems.

In order to start this process the HR user will: 1.

   Click on the Task tab in the ribbon

2. Select **Promotion/Transfer** Button

3. A Promotion/Transfer Wizard will be displayed for the HR user to go through.

4. The HR User can change the Department, Position, Manager?, Cost Center, WorkStation location field on the Promotion/Transfer Wizard

5. The HR user must set the Promotion/Transfer Date.
6. The first option on the wizard is for the HR user to remove systems from the employee. In order to remove systems, the user can:
   a. Select the pencil on the filter
   b. This will allow them to set the Remove value to True

7. To get to the next step in the promotion/transfer wizard, the user must click the Next --> button on the view.

8. In the next step, the HR user can add systems to the employee by selecting the green plus button

9. Lists of the current systems are shown at the bottom of the screen.

10. The HR user has the ability to take a step back in the wizard by selecting the <-- Previous button, or move forward in the process by selecting the Next --> button.

11. The next page is a summary of the system for the promotion/transfer process.
12. The top list shows systems being removed, while the bottom list shows systems being added.
13. When the HR user hits complete, the system will prompt the user

**Note: If the HR user needs to cancel the promotion/transfer process that can be done on the employee object.**

14. Once the user selects OK the screen will change stating the system task will be sent out a few days before the promotion transfer date.

Once the promotion/transfer date occurs, the departmental system task will be sent out to the departmental users.

**Note: If the HR user needs to cancel the promotion/transfer process that can be done one the employee object.

15. Click on the Task tab in the ribbon

16. Select *Cancel Promotion/Transfer* Button
Separation

When an employee is separated from the organization all systems need to be removed from that employee. In order to start this process the HR user will:

1. Click on the Task tab in the ribbon
2. Select Employee Separation Button
3. A form will appear for the HR user to complete

4. When the following information is completed a Unity Form will be created for the Hiring Manager to complete.
5. Go to Workflow -> EST - Employee Separation Form
6. The Hiring Manager will complete the unity form then send back to HR. Once sent back to HR, the separation information will show on the employee record.
7. When the separation date is today, the departmental groups will receive emails to remove all systems from the employee

**Note:** If the HR user needs to cancel the separation process that can be done on the employee object.

8. Click on the Task tab in the ribbon

9. Select *Cancel Separation* Button