

Important Information

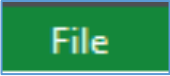
When assigning delegates please keep the following in mind:


1. The directions in this document apply only to approval processes that use the OnBase Workflow Approval Management (WAM) module. Approval processes that do not use WAM cannot assign delegates in this way.
2. You can only select delegates from a list of users that have approval privileges for that WAM process. If you don't see the person you wish to assign as a delegate, contact the OnBase team by creating a service request.
3. Once a delegate is assigned, the original approver will not receive any emails or reminders that there are documents to process.
4. Existing documents waiting for approval will not be re-assigned to the delegate automatically. You may finish the existing ones yourself or contact the process owner to request the approver be updated.
5. Once a delegate is assigned, the delegate takes on all steps of that particular approval process for which the original approver was responsible. Within one WAM approval process there is no mixture of delegated and non-delegated approvals.
6. When selecting delegation for a specific date range (recommended), the date range applies to all approval processes for which you have assigned a delegate. It cannot be assigned per approval process.
7. When a delegate is removed, you will need to request that all pending approvals be reassigned to you or to a new delegate.

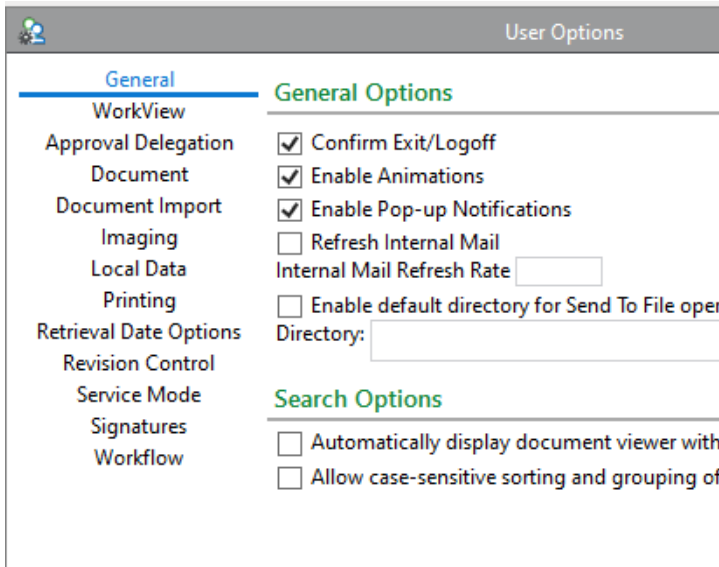
For help contact submit a ticket via the help menu at doit.niu.edu.

Setting a WAM Delegate in the Unity Client

1. Log into the OnBase Unity client. You log into your Home view by default.

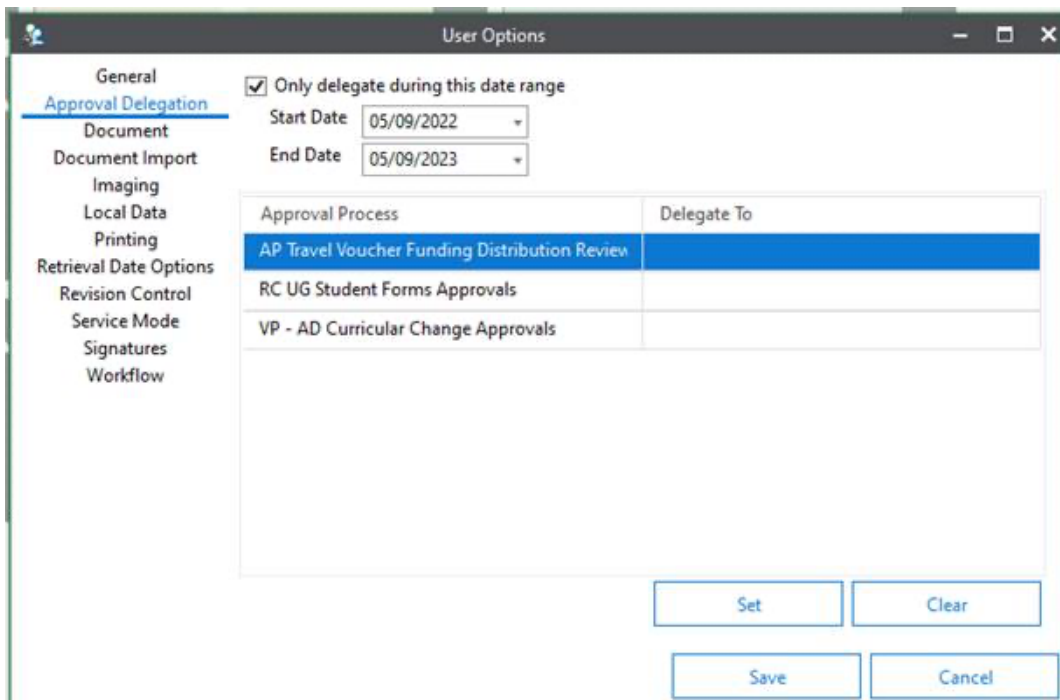
- Click on the File tab  in the upper left corner of the screen, then select User

Options  User Options. The User Options window appears:



These are options that you can set to customize your Unity Client.

- Select Approval Delegation from the list on the left of the screen. The Approval Delegation screen appears:



4. To choose a temporary delegation, select the “Only delegate during this date range” checkbox, then select the Start Date and End date. These settings will apply to all of your approval processes. It is HIGHLY recommended that you set a date range, as it is easy for you to forget that you are an approver for a particular process. If you move out of your approval position without disabling the delegate, the OnBase team cannot remove the delegation for you.
5. Select the desired WAM approval Process from the list.
6. Double-click the process or click the Set button to open the available delegates for the selected approval process.
7. Select your delegate from the list.

*Note: You will only see users that have the privileges to be assigned. If you don't see your desired delegate, submit a service request to the OnBase team by following the below steps:

 - a. Go to it.niu.edu
 - b. Login with your NIU user-id and password
 - c. Click on 'Get Help' icon
 - d. Click on 'Submit a Form' button in Request a Service section
 - e. Click on 'Add/Remove OnBase Access' under 'Document and Print Management'
 - f. Complete the form:
 - i. Select 'General' in Access Requested field
 - ii. Select 'Add Access'
 - iii. Enter details of Account(s) needing delegation access, Access start date, add comments as 'Add delegate access for Travel Voucher'
 - iv. Click on attestation check boxes
 - v. Click 'Submit'.
 - g. After the request is fulfilled by the OnBase team, restart the process in this guide.
8. Click Okay, then Save.

Removing a Delegate

1. To remove a delegate, follow all of the steps for adding a delegate until Step 5.
2. With an approval process selected, click on “Clear”. Verify that the delegate has been cleared.
3. Click Save.