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 Web Client

1. Log into OnBase at onbase.niu.edu using your NIU Account ID (not email address) and regular network password. You are logged into the Document Retrieval view by default, which is where you can search for and view existing documents.
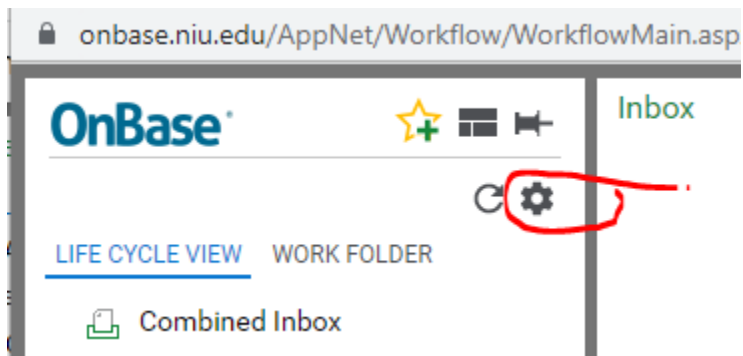
2. Click on the little "hamburger" beside Document Retrieval in the upper left corner of the screen:
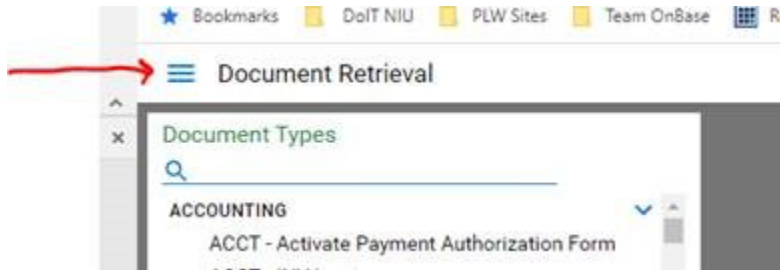
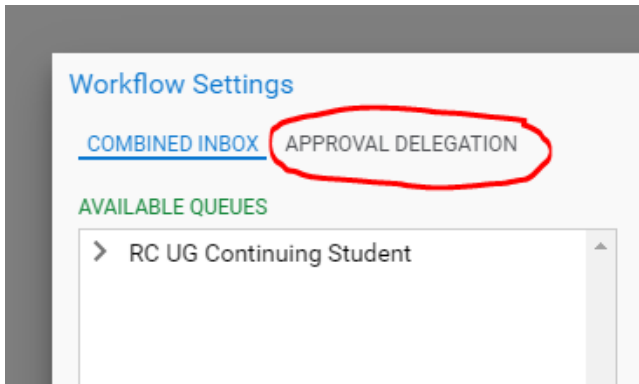A menu will appear on the left-hand side.

3. Select "Open Workflow". A new window opens showing the workflows to which you have access.

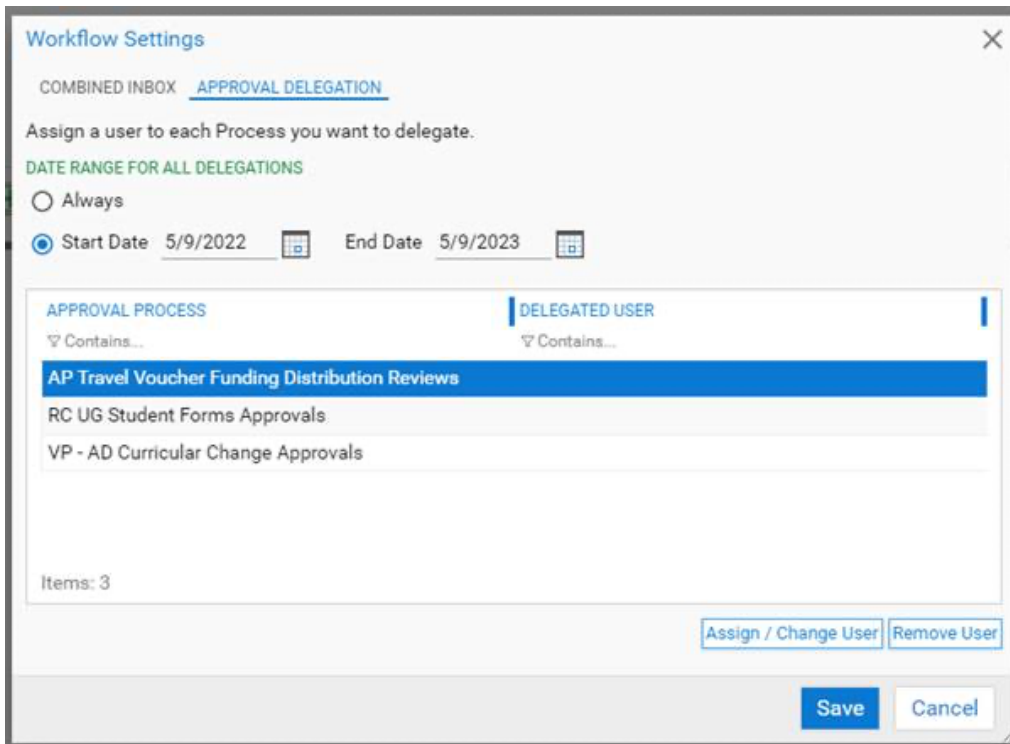4. Select the Workflow Settings icon (depicted as a gear) in the left hand pane of the window:

A new window called Workflow Options opens.

5. Select Approval Delegation

The Approval Delegation Screen opens, showing all of the WAM approval processes that you are assigned to. For example:

6. Under DATE RANGE FOR ALL DELEGATIONS, choose to always have a delegate for the approval process or only to have a delegate during a specific range. 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.

7. Select an approval process. (Skip to step 10 to remove a user)

8. Select Assign/Change User

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9. 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.

10. Click Save.

Removing a Delegate

1. To remove a delegate, follow all of the steps for adding a delegate until Step 8.

2. With an approval process selected, click on "Remove User".

3. Click Save.