
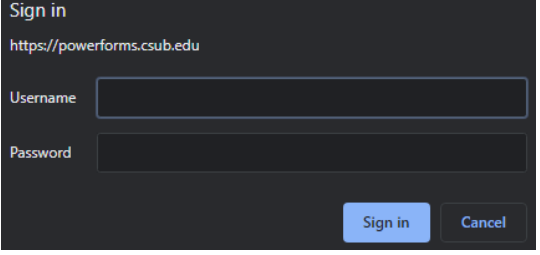
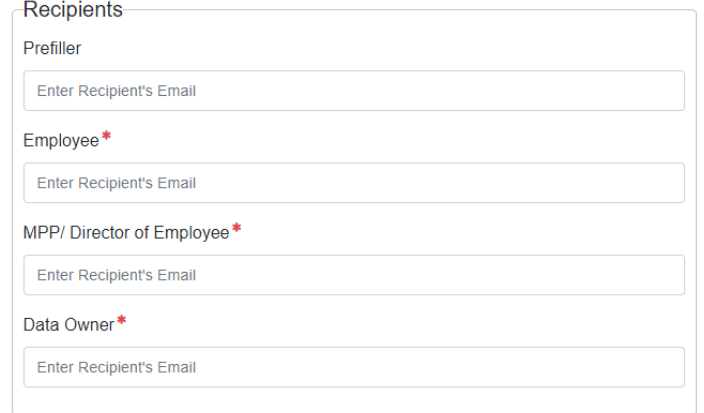
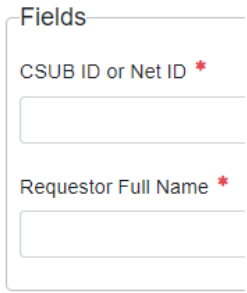
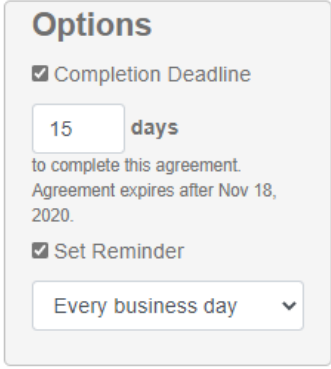
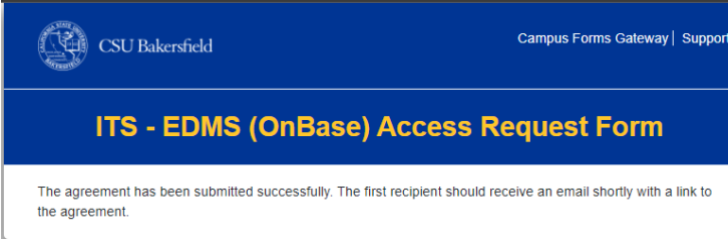


Enterprise Document Management System (OnBase) Access Request Form Instructions

Faculty, Staff, and Student Assistants may use this form to request access to a group of documents in OnBase. To complete this form, follow the steps below.

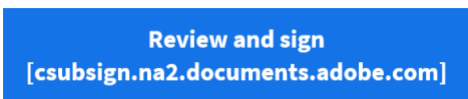
<p>1 Click the form link Enterprise Document Management (EDM) OnBase Access Form available on the Campus Forms Gateway.</p>	
<p>2 At the Sign in prompt, enter your CSUB NetID for the username and your password to authenticate.</p>	
<p>3 In the Recipients section, enter the email addresses for the required Recipients (indicated by a red asterisk).</p> <ul style="list-style-type: none"> • (OPTIONAL) Prefiller/Contact Enter the email address of the person Initiating the access request • Employee Enter the email address of the person receiving/requesting the access • MPP/Director of Employee Enter the email address of the employee's MPP or Director • Data Owner Enter the email address of the data owner for the document group for which access is requested. (See Table 1: Data Owners of Document Groups for the list of data owner email addresses to enter). 	

<p>4</p>	<p>In the Fields section,</p> <ul style="list-style-type: none"> • CSUB ID or Net ID Enter the CSUB ID or Net ID of the person requesting access • Requestor Full Name Enter the first and last name of the person requesting access 																
<p>5</p>	<p>(RECOMMENDED) In the Options section, you can enter a completion deadline and set a reminder.</p> <p>To set a Completion Deadline,</p> <ul style="list-style-type: none"> • Check the Completion Deadline box • Enter the number of days <p><i>Completion deadlines will cause the document to expire if not completed in the number of days specified (includes weekends and holidays).</i></p> <p>To set a Reminder,</p> <ul style="list-style-type: none"> • Check the Set Reminder box • Select a reminder frequency. <p><i>This will automatically send an email reminder to signers when their signature is requested.</i></p>																
<p>6</p>	<p>Click the Submit button and the following success message is displayed.</p> <p><i>The agreement has been submitted successfully. The first recipient should receive an email shortly with a link to the agreement.</i></p>																
<p>7</p>	<p>(OPTIONAL) when the Initiator receives the email, they are prompted to provide their information as well as their recommendation of access to the employee.</p> <p>The details of the requested fields are listed as follows:</p> <table border="1" data-bbox="181 1612 1523 1900"> <thead> <tr> <th>Filed Name</th> <th>Related to</th> <th>Details</th> </tr> </thead> <tbody> <tr> <td>Contact (if other than employee)</td> <td>Prefiller</td> <td>Email of Prefiller</td> </tr> <tr> <td>Contact Ext</td> <td>Prefiller</td> <td>Phone number of Prefiller</td> </tr> <tr> <td>Email Address</td> <td>Employee</td> <td>Employee Email</td> </tr> <tr> <td>Department</td> <td>Employee</td> <td>Department of the employee</td> </tr> </tbody> </table>	Filed Name	Related to	Details	Contact (if other than employee)	Prefiller	Email of Prefiller	Contact Ext	Prefiller	Phone number of Prefiller	Email Address	Employee	Employee Email	Department	Employee	Department of the employee	
Filed Name	Related to	Details															
Contact (if other than employee)	Prefiller	Email of Prefiller															
Contact Ext	Prefiller	Phone number of Prefiller															
Email Address	Employee	Employee Email															
Department	Employee	Department of the employee															

Employee Type	Employee	Type of Employee
Type	Employee	New or Change (if you already have existing access)
For Documents In	Employee	Departmental documents that you are requesting to access.
Document Access Role	Employee	Access role for requested documents (See Table 2 Document Access Roles for details.)
Workflow Access Role	Employee	Access role for department workflows (See Table 3 Workflow Access Roles for details.) If no workflow access is required, choose “Not Required”.

8 After completion of all required fields, the form will be automatically routed to the next signer (Employee).

9 When the employee receives the email, click the **Review and Sign** link to open the form and enter the required information.



10 On the form, complete the **Employee Information** section with details of the person requesting access.

11 Complete the **Requested Access Information** fields, if it is not completed earlier, as follows:

- **Type**
New or Change (if you already have existing access)
- **For Documents In**
Departmental documents that you are requesting to access.
- **Document Access Role**
Access role for requested documents (See [Table 2 Document Access Roles](#) for details.)
- **Workflow Access Role**
Access role for department workflows (See [Table 3 Workflow Access Roles](#) for details.) If no workflow access is required, choose “Not Required”.

12 In the **Acknowledgements and/or Attachments** section complete the required fields.

- **OnBase Systems Admin**
Only used when requesting access as a system administrator. Check and attach Hyland Certificate.
- **Staff/Faculty/POI**
For all Staff, Faculty, or Persons of Interest, check to agree that you have read the Confidentiality Agreement. A signed copy of the Confidentiality Agreement must be on file with HR, and it will be verified before access is granted.
- **Student Workers**
Check if requestor is a student assistant and attach a signed confidentiality agreement
- **Acknowledgement of computer encryption**
When the document group requested for access contain confidential data, the hard drive of the computer must be encrypted if it is not already. The CSUB Service Desk will contact the requestor if encryption is required.


<p>13</p>	<p>The requestor should apply their electronic signature, by clicking or tapping on the Requestor’s Signature field. A small box will appear with several options to capture a signature.</p> <p>Once the signature is applied, click the “Click to Sign” button at the bottom to complete the signing process.</p> <p>The form will be automatically routed to the next signer. The requestor will receive a notification once the ITS Business Office has accepted the form after all signatures are collected.</p>	
<p>14</p>	<p>The Director/MPP will receive an email notification to sign the form to approve the request (see Step Review&Sign).</p> <p>Comments/Corrections can be entered in the space provided prior to signing.</p> <p>The form is then automatically routed to the Data Owner.</p>	
<p>15</p>	<p>The Data Owner will receive an email notification to sign the form to approve the requested access to the document group (see Step Review&Sign).</p> <p>Comments/Corrections can be entered in the space provided prior to signing.</p> <p>The form is then automatically routed to the Human Resources department.</p>	
<p>16</p>	<p>The Human Resources department will verify that a signed Confidentiality Agreement for the requestor is on file for Faculty, Staff, and Persons of Interest. (Student Worker form will bypass this step)</p> <p>Once the Confidentiality Agreement is verified, check “Yes” and apply initials.</p> <p>The form is then automatically routed to the ITS Business Office.</p>	
<p>17</p>	<p>The ITS Business Office will accept the form.</p> <p>When the form is accepted, all signers will receive a notification and a completed copy of the form.</p>	
<p>18</p>	<p>Once the OnBase admin has configured the access, the requestor will receive an automated email notification. If the OnBase Unity Software is deployed (Windows PC only), the requestor will receive an email notification.</p>	

TABLE 1: DATA OWNERS FOR DOCUMENT GROUPS

Table 1 provides a listing of the data owners for document groups. Use the column **For Documents In** to determine the correct Data Owner Email address to use in step 3. Copy & paste the email into the Data Owner email address field.

For Documents In	Data Owner Email	Data Owner Title
AARC - Academic Advising & Resource Center	djackson9@csub.edu	Dean of Graduate and Undergraduate Studies
A&H - Arts & Humanities	rfrakes1@csub.edu	Dean of Arts & Humanities
BPA – Business & Public Administration	sbach@csub.edu	Dean of Business & Public Administration
BR – Budget & Reporting Services	nhayes1@csub.edu	AVP & Chief Budget Officer
BS – Business Services	mchavez14@csub.edu	AVP of Business Services
BS – Property	mchavez14@csub.edu	AVP of Business Services
BS – Safety, Risk, & Sustainability	mchavez14@csub.edu	AVP of Business Services
EEGO – Extended Education & Global Outreach	mnovak2@csub.edu	Dean of Extended Education & Global Outreach
EM – Enrollment Management [All Departments]	dcantrell2@csub.edu	AVP of Enrollment Management
EM – Admissions	jmccune@csub.edu	Registrar
EM – Admissions (Graduate)	vbethea@csub.edu	AVP of Enrollment Management
EM – Admissions Pgm Support	vbethea@csub.edu	AVP of Enrollment Management
EM – Advising	tholiwell@csub.edu	Director of Enrollment Management
EM – EOP	swalsh@csub.edu	Director of Educational Opportunity Program
EM – Financial Aid	cmorris@csub.edu	Director of Financial Aid
EM – International	vbethea@csub.edu	AVP of Enrollment Management
EM – Records	jmccune@csub.edu	Registrar
FM – Facilities Management	jhedges@csub.edu	AVP Capital Planning & Design
FS – Financial Services	qking@csub.edu	AVP of Financial Services & Controller
GRaSP – Grants, Research & Sponsored Programs	isumaya@csub.edu	AVP of Grants, Research & Sponsored Programs
HR – Human Resources	lblindorn@csub.edu	AVP of Human Resources
HR – Payroll	lblindorn@csub.edu	AVP of Human Resources
ITS – Information Technology Services	fgorham@csub.edu	CIO/AVP of Information Technology Services
ITS – OnBase Systems Administrator	fgorham@csub.edu	CIO/AVP of Information Technology Services
NSG – Nursing Dept	dwilson4@csub.edu	Department Chair of Nursing
NSME - Natural Sciences, Mathematics, & Engineering	jdong2@csub.edu	Dean of Natural Sciences, Mathematics, & Engineering
SSE - Social Sciences & Education	jlrodriguez@csub.edu	Dean of Social Sciences & Education
UA – University Advancement [All Departments]	hniemeyer@csub.edu	Vice President of University Advancement

TABLE 2: DOCUMENT ACCESS ROLES

Document Access Roles	Description for Document Access Roles
View Only	Document privileges to search & retrieve department documents with view-only access
Student Assistant	Document privileges to view, import, and index.
Standard/ Staff	Document privileges to view, import, index, and process.
Document Specialist	Document privileges to view, import, index, re-index, and process.
Department Admin	Complete access to all department documents and features to manage them
OnBase Systems Admin	Full Access to provide system administration and configuration for OnBase. Hyland Training is required.

TABLE 3: WORKFLOW ACCESS ROLES

Workflow Access Roles	Description for Workflow Access Roles
Not Applicable	Department is not currently using workflows.
Not Required	Access to current departmental workflows is not required
Reviewer/ Approver	Reviewer access requested for departmental workflows.
Secondary Reviewer	Secondary Reviewer access requested for departmental workflows.