

# OnBase - Remote Work Arrangement Approver Guide

*This documentation is intended for Approvers of Remote Work Arrangements who will be navigating the OnBase workflow Arrangement which manages this process.*

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## OnBase - Remote Work Arrangement Approver Guide

### Remote Work Arrangement Process Overview

A form is now available for employees to submit Arrangements for Remote Work with the University. Once submitted, the forms will go through a series of approvals before they can be acted upon. This guide is for the Approvers who will be receiving, reviewing, and either approving or denying the requests of the Submitters.

Approver Role	Description
Submitter	Employee who submits the Arrangement via a form published on a website
Manager	The Submitter's manager, first approver of Arrangement
Dean/VP	Dean/VP of the Submitter's school/college/department, second approver of Arrangement
HR VP	Vice President of HR, only required to review and approve if Remote Work is out of MA

### Notification and Logging In

When an Arrangement for remote work is submitted or approved in earlier steps, Approvers will receive a notification email with a link to the Arrangement in the Remote Work Arrangement Workflow in OnBase advising that there is an Arrangement pending review in the queue. Clicking the link will bring you directly into the workflow in the OnBase Web Client with your BU Login credentials. If you are not already logged in you will have to login and authenticate via Duo.

When the workflow queue opens, Approvers can only see the request the link was provided for. To see all your pending requests, return to the Life Cycle view in the upper left-hand corner and then click on the queue name. Once an Approver clicks on the queue, they will see all requests pending their review and approval.

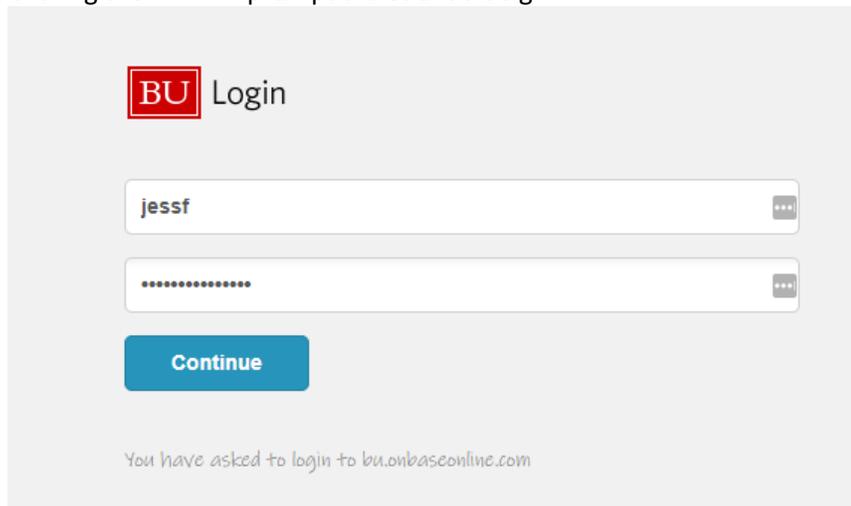
You can alternatively log into the OnBase Web Client at any time to review Arrangements pending in your Approver Queue by using the link provided and following the steps below. Logging in this way will provide access to Dashboards as well as the workflow but will require a few extra steps to get to the workflow queue.

**Web Client Link:** <https://bu.onbaseonline.com>

Browser compatible with the web client are documented on TechWeb:

<https://www.bu.edu/tech/services/admin/document-management/onbase/clients/>

Clicking the link will prompt a credentials sign-in.

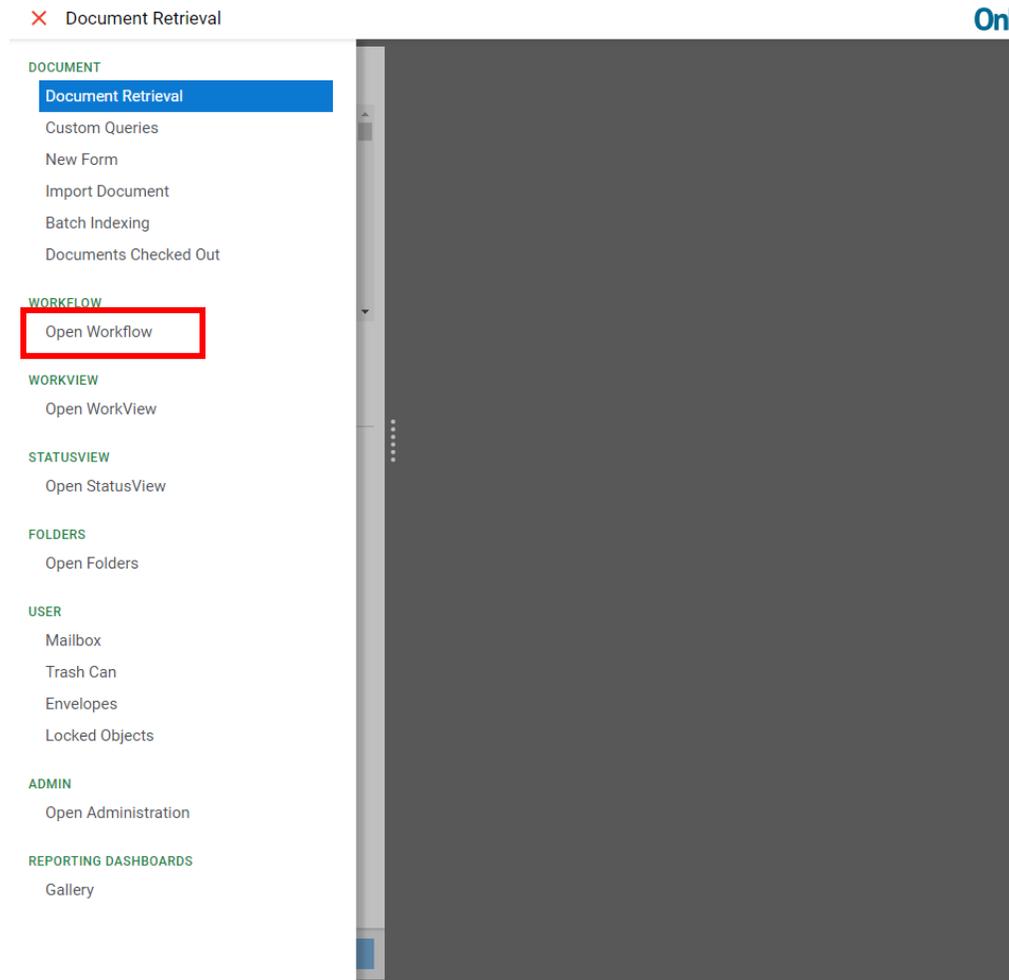
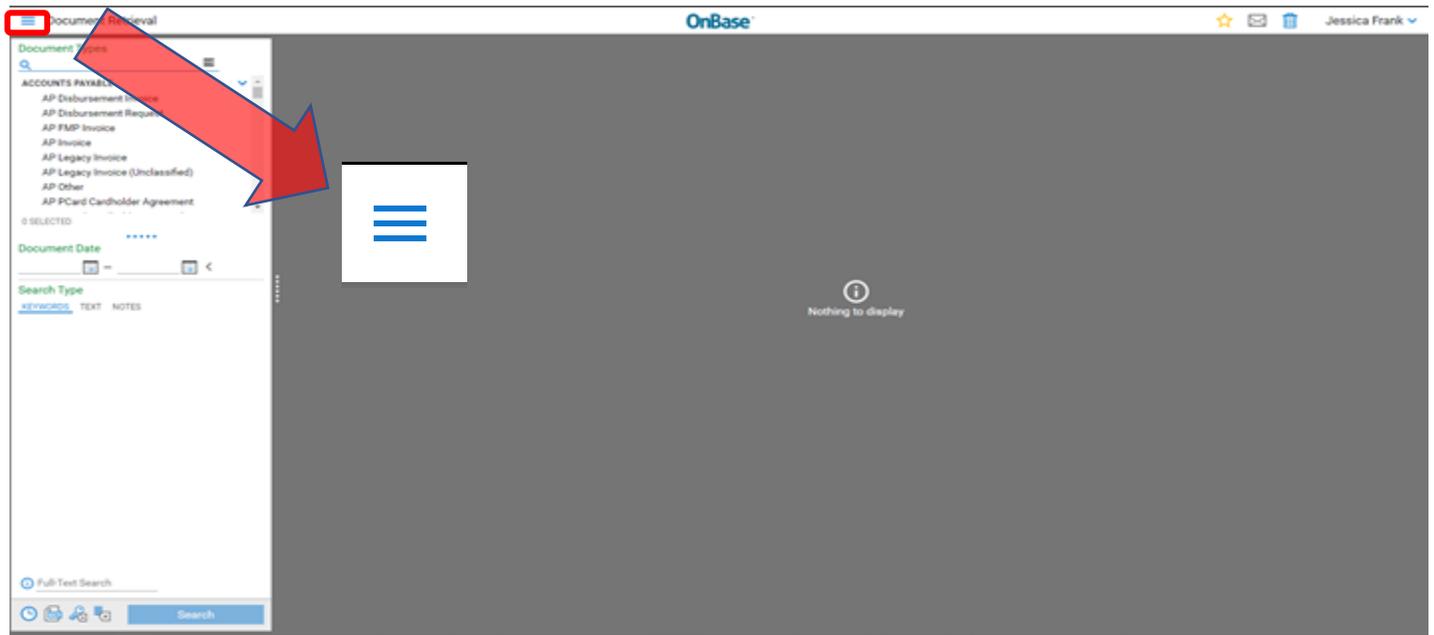


The screenshot shows a login interface with the following elements:

- BU Logo and "Login" text.
- A text input field containing the username "jessf".
- A password input field with masked characters ".....".
- A blue "Continue" button.
- At the bottom, a small grey text message: "You have asked to login to bu.onbaseonline.com".

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Once signed in, click the hamburger button in the top left corner and when the menu opens, select Open Workflow.



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When the Workflow opens, find PER Remote Work Arrangement process, and click the arrow on the left to expand the view. Select the Approval queue that is appropriate. **Each Approver will only see the queue for their role.** This screen captures shows all the queues in the workflow.

The screenshot displays the OnBase interface for the PER Remote Work Application Process (RWA). The main content area shows a tree view of workflow steps under the heading "PER Remote Work Application Process (RWA)". The "PER RWA Manager Approval (3)" step is highlighted in yellow. Other steps include "PER RWA Initial (0)", "PER RWA Error (2)", "PER RWA Dean/VP Approval (2)", "PER RWA HR VP Approval (0)", "PER RWA Trial Period (1)", "PER RWA Report Extract for SAP (0)", "PER RWA Active Agreements (2)", and "PER RWA Exit (0)". Below these are "PER WARP" and "PER WARP Dean VP Autofill Update".

The right sidebar contains the following information:

- Logo: BO UNI
- Section: Requir
- BU ID: U5401
- Person: NREP-S
- Org Un

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### Workflow Approver Queues

Once credentials are validated Managers will navigate to the Manager queue, Dean & Vice Presidents to the Dean/VP queue, and HR VPs to the HR Review queue.

It is recommended that the Viewer Pane be oriented to the Right by clicking the windowpane icon in the top left corner near the OnBase logo and choose the "Right" option in the menu provided. This will allow you to see more of the form with less scrolling. In addition columns can be sized down on the list of Arrangements to review and each pane can be sized by dragging the dividing lines.

The screenshot displays the OnBase interface for Remote Work Requests. The left pane shows an 'Inbox' with a table of pending arrangements. The right pane shows a detailed 'Remote Work Request' form for a specific arrangement.

**Inbox Table:**

UID	LAST NAME	FIRST NAME	START DATE	ORG UNIT Lvl 5
			9/6/2021	UNIVERSITY SUSTAINABILITY
			10/4/2021	UNIV. LIBRARIES COLLEGE HEALTH & WELLNESS
			9/2/2021	GLOBAL PROGRAMS
			9/2/2021	GLOBAL PROGRAMS
			9/7/2021	PROVOST BUDGET AND PLANNING OFFICE
			0/1/2021	HUMAN RESOURCES

**Remote Work Request Form:**

**Status:** PENDING MANAGER APPROVAL

**Requester Information:**

- BU ID: [Redacted]
- Last Name: [Redacted]
- First Name: [Redacted]
- Email: GBOSCIO@BU.EDU
- Personnel Subarea: NREP-STAFF
- Job Title: ENGAGEMENT MANAGER, SU
- Manager: MS LISA TORNATORE
- Manager Email: LISAMT@BU.EDU

**Organizational Information:**

- Org Unit Lvl 4: OPERATIONS
- Org Unit Lvl 5: UNIVERSITY SUSTAINABILITY
- Org Unit Lvl 6: SUSTAINABILITY MANAGEMENT
- Employee Group: STAFF-EXEMPT FT
- Employee Subgroup: ADMIN ->SG
- Master Cost Center: IND: SUSTAINABILITY

**Prior Agreements:**

Did you have an approved remote work arrangement prior to March 2020, and if so, are you modifying it? \*

- This is an existing and approved agreement with no modifications.
- This is an existing and approved agreement, but with modifications.
- This is a new request.

**Requested Work Schedule:**

	Mon	Tues	Wed	Thur	Fri	Sat	Sun
On Campus:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Remote Work in MA:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Remote Work Outside MA:	<input type="checkbox"/>						
Not Scheduled to Work:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				

**Summary:**

- Remote Days per Week in MA: 2
- Remote Days per Week Outside MA: 0
- Total Remote Days per Week: 2
- Start Date: 09/06/2021

**Buttons:** Done, Update Changed Days of the Week, Re-send Notification to Mgr, Approve On Behalf Of, Deny On Behalf Of, Withdrawn

Each Manager/Dean/VP/HR VP will only see the Arrangements pending their review in the respective queues and the pending Arrangements are viewable in a list. Selecting one of the Arrangements will show the form in the document viewer; it may take a few moments to load. Decisions and signatures take place at the bottom of the form, which will be elaborated on below in the DECISION section of this document.

**IMPORTANT NOTE FOR DEAN/VP APPROVERS:** If a Dean/VP Approver is a direct manager to a Submitter, they will be granted access to the Manager queue. Dean/VPs will need to go to the Manager queue in order to approve the pending arrangement from their direct reports, however, TAKE CARE. Dean/VPs will be able to see ALL pending arrangements for ALL Managers in the Dean/VP's Lvl 4 and Lvl 5 areas; be sure to only select and approve the pending arrangements from direct reports from this queue. If a Dean/VP needs to approve a request from the Manager Queue in lieu of the assigned Manager, the Dean/VP should leave a note in the notes tab about why they are approving instead. Once the arrangement is signed, saved and the DONE is clicked from the Manager queue, it will skip the Dean/VP queue and go on to HR review if it is needed. Otherwise, it will be marked with the decision and sent to the Submitter. The Dean/VP signature will automatically be filled by the workflow.

There are a few available buttons on the workflow Qs as listed below. The buttons available on the queue will vary by security role. Approvers can see these buttons:

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Button	Function	Availability
 Done	Done button sends a signed document to the next stage in the process. Button is MANDATORY and must be pressed in order to approve/deny a document officially.	All Approvers
 Withdrawn	Withdrawn button removes an Arrangement from the approval process at the Arrangement of the Submitter	All Approvers
 Update Changed Days of the Week	If you have edited which days of the week are remote vs on-campus and are not ready to click the Done button, use this button to update the stored data so changes are reflected in your report	Manager Approvers Only

### Review and Edit Form

Forms pending in the workflow must be reviewed carefully by each Approver. There are several sections of the document that should be reviewed before a decision is made and there are specific fields that certain Approvers can edit.

#### Header

Identifies STATUS and SUBMITTER information as well as the type of Arrangement

#### Requested Work Schedule

Monday to Sunday check box schedule that allows the submitter to mark which days they will be working on campus vs. remote and whether they will be working remote in-state or out of state. There are calculating fields to show how many on campus, remote in MA, and remote outside MA days are being requested.

#### Address

Identifies the state(s) remote work being requested will be performed in. Managers can make changes to the days selected to better manage their team's days in and out of the office, as well as add notes in various sections of the document. Dean/VPs and HR VPs can edit the notes fields to add restrictions and requirements to the Arrangement.

Fields for Review/Editing	Description	Manager	Dean/VP	HR VP
On Campus	Mon-Sun check boxes	Can edit	Read Only	Read Only
Remote Work in MA	Mon-Sun check boxes	Can edit	Read Only	Read Only
Remote Work Outside MA	Mon-Sun check boxes	Can edit	Read Only	Read Only
Not Scheduled to Work	Non-Work Day check boxes	Can edit	Read Only	Read Only
Remote Days per Week in MA	Sum of days marked for MA Remote Work	Read Only	Read Only	Read Only
Remote Days per Week Outside MA	Sum of days marked for non-MA Remote Work	Read Only	Read Only	Read Only
Total Remote Days per Week	Sum of Remote days requested	Read Only	Read Only	Read Only
Start Date	Date Arrangement becomes effective	Can edit	Can edit	Can edit

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Additional Details	Notes/Input	Can edit	Can edit	Can edit
Special Restrictions	Seasonal work, etc.	Can edit	Can edit	Can edit
Special Requirements	Per school or department	Can edit	Can edit	Can edit

### Notes

There is a Notes tab where additional information and comments can be left. This is a good place to make notes about the status of review or consideration of this Arrangement.

Take care; anything written in the Notes section is visible to everyone including the Submitter when the Arrangement document is returned to them with a decision, even if it is denied.

**Remote Work Request**

**BOSTON UNIVERSITY**

Request Notes

BU ID: [REDACTED]

Last Name: FRANK

Enter a note in the provided text box and click Save Note when ready. Once the note is saved, also save the form so the changes are captured.

Notes that are already entered on the form are visible in the section below the text box and show who entered the note, when, and the note text. These can be removed from the form at any time before the Done button is clicked; if there is a note on the Form that the Submitter should not see, be sure to remove it before Approving or Denying the Arrangement.

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Request

Notes

**BE AWARE:** Notes entered here will be visible to anyone who has access to this document type, and will be seen by the employee when the Remote Agreement Approval process is complete and a PDF copy of the form is sent to them.

Enter a new note (press "Save Note" button to save and timespamp the note):

Save Note

Save Form (Save Note first!)

Notes

Add

Entered By

Jessica Frank

Note

This is a note

Entry Date

08/10/2021

Remove

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### Decision

Decisions on Arrangements are made via the drop-down list in the Decision section and there are five options. They are listed below with the form behavior for each choice. The signature block will look slightly different for each level of Approver. Depending on their role, they will see their own decision row and the decisions made prior to them therefore, the placement of decision drop down, sign, and save buttons may shift.

### Approved

Decisions			
	Name	Decision	Date
Manager:	<input type="text"/>	APPROVED <input type="button" value="⌵"/>	<input type="text"/>
	Enter your decision, then click "Sign" to sign the form.		<input type="button" value="Sign"/>
Dean/Vice President or Designee:	<input type="text"/>	<input type="text"/>	<input type="text"/>
VP for Human Resources:	<input type="text"/>	<input type="text"/>	<input type="text"/>
			<input type="button" value="Save"/>

Choose this option if the Arrangement is being approved exactly as it was submitted with no changes.

### Approved w/Changes

Decisions			
	Name	Decision	Date
Manager:	<input type="text"/>	APPROVED W/ CHANGES <input type="button" value="⌵"/>	<input type="text"/>
	Enter your decision, then click "Sign" to sign the form.		<input type="button" value="Sign"/>
Dean/Vice President or Designee:	<input type="text"/>	<input type="text"/>	<input type="text"/>
VP for Human Resources:	<input type="text"/>	<input type="text"/>	<input type="text"/>
			<input type="button" value="Save"/>

Choose this option if the Approver has done any of the below.

- Changed requested days on campus/remote
- Added notes, restrictions, or special requirements
- Changed the Start Date of the Arrangement

### Approved Trial

Decisions				
	Name	Decision	Date	Trial End Date: *
Manager:	<input type="text"/>	APPROVED TRIAL <input type="button" value="⌵"/>	<input type="text"/>	<input type="text"/>
	Enter your decision, then click "Sign" to sign the form.		<input type="button" value="Sign"/>	Length of Trial (days): <input type="text" value="0"/>
Dean/Vice President or Designee:	<input type="text"/>	<input type="text"/>	<input type="text"/>	
VP for Human Resources:	<input type="text"/>	<input type="text"/>	<input type="text"/>	
				<input type="button" value="Save"/>

Choose this option if the Approver is approving the Arrangement exactly as it was submitted with no changes but only on a trial basis with a specified end date.

- A date must be entered into the Trial End Date field.

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- The length of the trial is automatically calculated based on the Start date on the Arrangement and the trial end date entered.
- 10 days before the trial expires, the Manager Approver and Submitter will get an email notifying them of the pending expiration.
- The Arrangement will be recycled to the Manager Approver's approval queue and the email notification will include a link to the Arrangement in the Workflow to be either reapproved or denied.

### Approved Trial w/Changes

Decisions				
	Name	Decision	Date	Trial End Date: *
Manager:	<input type="text"/>	APPROVED TRIAL W/ CHANGES	<input type="text"/>	<input type="text"/>
Enter your decision, then click "Sign" to sign the form.			<input type="button" value="Sign"/>	Length of Trial (days): <input type="text" value="0"/>
Dean/Vice President or Designee:	<input type="text"/>	<input type="text"/>	<input type="text"/>	
VP for Human Resources:	<input type="text"/>	<input type="text"/>	<input type="text"/>	
			<input type="button" value="Save"/>	

Choose this option if the Approver is approving the Arrangement as a trial AND has made any of the changes listed below.

- Changed requested days on campus/remote
- Added notes, restrictions, or special requirements
- Changed the Start Date of the Arrangement
- A date must be entered into the Trial End Date field.
- The length of the trial is automatically calculated based on the Start date on the Arrangement and the trial end date entered.
- 10 days before the trial expires, the Manager Approver and Submitter will get an email notifying them of the pending expiration.
- The Arrangement will be recycled to the Manager Approver's approval queue and the email notification will include a link to the Arrangement in the Workflow to be either re-approved or denied.

### Deny

Decisions				
	Name	Decision	Date	Denial Reason: *
Manager:	<input type="text"/>	DENIED	<input type="text"/>	<input type="text"/>
Enter your decision, then click "Sign" to sign the form.			<input type="button" value="Sign"/>	Notes about denial reason: (250 char limit) * <input type="text"/>
Dean/Vice President or Designee:	<input type="text"/>	<input type="text"/>	<input type="text"/>	
VP for Human Resources:	<input type="text"/>	<input type="text"/>	<input type="text"/>	
			<input type="button" value="Save"/>	

Choose this option if the Approver is denying the Arrangement. A Denial Reason drop down list will appear with 3 options.

- Not eligible for remote work
- Job cannot be performed remotely
- Other

Once a Denial Reason is selected, input a denial reason note to the Submitter about why their Arrangement was denied in the Notes about denial reason field. The Denial Reason and this note will be merged to the text of the notification that the Submitter receives.

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### Sign and Save

Once the Approver has chosen a decision from the drop down, they must click and then on the face of the form. Signing the document will date it and fill in the Approver's name in the appropriate section depending on the Approver's role.

**Decisions**

	<b>Name</b>	<b>Decision</b>		<b>Date</b>
Manager:	Lillith Avalon	APPROVED		08/10/2021
Enter your decision, then click "Sign" to sign the form.				<div style="background-color: #0070c0; color: white; padding: 5px; width: 50px; margin: 0 auto;">Sign</div> <div style="background-color: #4f81bd; color: white; padding: 5px; width: 50px; margin: 5px auto;">Save</div>

**Special Case:** If the Manager Approver is the same person as the Dean/VP Approver, the Arrangement will skip the Dean/VP Approver queue once the Manager Approver has approved. The Dean/VP signature will be completed by the workflow mirroring the Decision, Date, and Name of the Manager.

### Decision Matrix

Decisions made upstream directly affect the decision capable of being made downstream in the approval process. Below are two grids showing the available options for Dean/VPs depending on the Manager Decision and the options for HR VPs depending on the Dean/VPs Decision.

Depending on the decision made by the Approver at the level prior, choices of Decision will be limited.

Manager Decision	Dean/VP Decision Options	Notes
Approved	<ul style="list-style-type: none"> <li>Approved</li> <li>Approved w/ Changes</li> <li>Approved Trial</li> <li>Approved Trial w/ Changes</li> <li>Denied</li> </ul>	Dean/VP should consult with Manager if doing anything other than Approved.
Approved w/ Changes	<ul style="list-style-type: none"> <li>Approved w/ Changes</li> <li>Approved Trial w/ Changes</li> <li>Denied</li> </ul>	Can only Approve with Changes because the Manager already changed the Arrangement from the original submission. Additional changes can also be made by Dean/VP
Approved Trial	<ul style="list-style-type: none"> <li>Approved Trial</li> <li>Approved Trial w/ Changes</li> <li>Denied</li> </ul>	Can only approve as a Trial because Manager approved as a Trial.
Approved Trial w/ Changes	<ul style="list-style-type: none"> <li>Approved Trial w/ Changes</li> <li>Denied</li> </ul>	Can only approve Trial with Changes because the Manager already changed the Arrangement from the original submission and approved it as a Trial. Additional changes can also be made by Dean/VP
Denied	n/a	Dean/VP will never get this Arrangement.

Dean/VP Decision	HR VP Decision Options	Notes
Approved	<ul style="list-style-type: none"> <li>Approved</li> <li>Approved w/ Changes</li> <li>Denied</li> </ul>	HR VP should consult with Manager if doing anything other than Approved. If the HR VP adds Seasonal or Special approval comments, they should choose Approved w/ Changes
Approved w/ Changes	<ul style="list-style-type: none"> <li>Approved w/ Changes</li> <li>Denied</li> </ul>	Can only Approve with Changes because the Manager or Dean/VP already changed the Arrangement from the original submission. Additional changes can also be made by Dean/VP

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Dean/VP Decision	HR VP Decision Options	Notes
Approved Trial	<ul style="list-style-type: none"> <li>Approved Trial</li> <li>Approved Trial w/ Changes</li> <li>Denied</li> </ul>	Can only approve as a Trial because the Manager and/or Dean/VP approved as a Trial. If the HR VP adds Seasonal or Special approval comments, they should choose Approved Trial w/ Changes
Approved Trial w/ Changes	<ul style="list-style-type: none"> <li>Approved Trial w/ Changes</li> <li>Denied</li> </ul>	Can only approve Trial with Changes because the Manager and/or Dean/VP already changed the Arrangement from the original submission and approved it as a Trial.
Denied	n/a	HR VP will never get this Arrangement.

### DONE Button



Once the document is signed and saved, it remains in the Approver's queue until the DONE button is clicked. The DONE button is located on the workflow queue and not on the form.

Until the Done button is clicked, the Arrangement will remain in the Approver's queue. This allows the Approver to review multiple Arrangements and potentially change decisions or update Arrangements before declaring them Done in order to ensure necessary staff coverage.

If you return to finalize a decision made and saved on the form earlier, select the Arrangement that is Done and then click the Done button. You do not need to edit or save the form again.

**SPECIAL CASE:** Dean/VPs who are also Manager Approvers will only need to approve a request once from the Manager queue; their decision will also be applied to the Dean/VP Approver decision. This will skip the Dean/VP queue and either remark the document as fully approved or forward the document to HR VP for review.

**IMPORTANT: IF YOU DO NOT CLICK THE DONE BUTTON, THE ARRANGEMENT WILL NOT PROGRESS TO THE NEXT STEP REGARDLESS OF DECISION OR SIGNATURE.**

### Notifications

Below is a table of the notifications that may be generated by the approval process.

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Notification Type	Notification Description	Submitter	Manager	Dean/VP	HR VP
Review Requested	Email notification with link advising Approver that there is an Arrangement pending review	N/A	To	To	To
Review Reminder	Email notification with link advising that Arrangement has been waiting for 7 days	N/A	To	To	To
10-Day Trial Expiration	Email notification with link advising that an approved trial is 10 days from expiration and requires review	To	Cc	N/A	N/A
Request Approved	Email notification with a PDF of Arrangement document attached advising that Arrangement has been approved	To	Cc	Cc if approval was for Out of State	N/A
Request Denied	Email notification advising that Arrangement has been denied	To	Cc	Cc – if HR VP Denies after Dean/VP Approves	N/A
Trial Ended Early	Email notification similar to a Denial which indicates that a previously approved Trial has been ended early by the Manager.	To	Cc	N/A	N/A
Withdrawn	Email notification informing Submitter and Manager Approver of Arrangement withdrawal	To	Cc	N/A	N/A

## Issue Resolution

Below are common issues Approvers may encounter during this process and how to resolve them.

Issue Description	Resolution
No Review Requested notification email	Contact Human Resources Business Partner and Arrangement that they resend email notification; they will be able to resend the notification to your email w/link Approvers can also see all Arrangements in their queue, so any Arrangement link from any email notification will open the queue and show all pending documents
Document not leaving queue	Did you make a Decision and Sign the Arrangement? Did you press the Done button?
Drop Down Options not populating	Close the webpage and reopen it via the email link in the notification you received about the request. This usually clears up this issue.
Locked Documents	If all fields on the Remote Work Arrangement Form appear greyed out, the document is locked. This can happen when someone else is viewing the document in OnBase OR if you have opened multiple copies of the document. See <a href="#">Appendix A</a> for resolution.
Unable to Log In	If you have any issues logging into OnBase Web Client, contact HR to have your account corrected and try again
Days of the week on Dashboard Report do not match changed days on request	If a Manager changes the requested remote/on campus days on a request and saves changes but does not click Done, the requested days will not update on the Dashboard Report. To see the updated days, click the Update Changed Days of the Week button on the Workflow before going to the Dashboard Report.

## Advanced Functionality

### Withdrawing an Arrangement

Only one Arrangement from a given Submitter can be in the workflow for approval at a time. Each of the Approver workflow queues has a button that will remove the Arrangement from processing and send a notification to the Manager Approver and Submitter that the Arrangement is no longer pending.

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### Withdrawn

At any time during the approval process, a Submitter may choose to withdraw their Arrangement. This means they no longer want to be considered for a Remote Work Arrangement OR they would like to submit a different Arrangement. An approver may determine that too many changes are required to approve the Arrangement and ask the employee to enter a new Arrangement. If you have discussed extensive changes with the staff member, rather than deny the current Arrangement, we recommend Withdrawing the Arrangement and informing the employee to enter a new Arrangement.

### Processing Multiple Requests

This applies to the Done, Withdraw, and Update Changed Days of the Week.

On these three buttons you can select more than one request in the queue and then press the button to process all selected requests at once. Processing might take some time and we recommend doing no more than 5 at a time to prevent crashing.

To select multiple non-consecutive items in a list, you can select them individually by holding down the Ctrl (PC) or Command (Mac) key. Then click on your desired items to select. All of the items you have selected should be highlighted with a different-colored background.

To select multiple items consecutively, click the first item, then press the SHIFT key and hold it. Click the last item and release the SHIFT key.

### Active Arrangements

A Submitter will have at most one ACTIVE approved Remote Work Arrangement at a time. However, they can have more than one Approved Arrangement for planning purposes. Active Flags will help Approvers identify and review documents submitted to them by Submitters who may already have approved Arrangements in place. You will be able to see the Active flag on the reporting dashboards; the Active flag does not appear on the face of the Arrangement documents.

#### Example Scenario:

- Today is August 31<sup>st</sup>, 2021.
- A Submitter has an approved and active Arrangement to work in California beginning August 16<sup>th</sup>, 2021.
- The Submitter knows that they will be relocating to Georgia on January 1<sup>st</sup>, 2022, so they submit a new Remote Work Arrangement in advance to get that adjustment approved with a future start date of Jan 1<sup>st</sup>.
- The Arrangement is approved by everyone.
- The newly approved Arrangement for Jan 1 will be set to a status of "Approved" but the Active Flag will still be "Pending" until the actual start date Jan 1, 2022.
- When the Jan 1<sup>st</sup> Arrangement is approved, the current approved Arrangement will be updated with an End Date of December 31<sup>st</sup>, 2021.
- On the 1<sup>st</sup> of January, the Active Flag on the older Arrangement will change to "Inactive" and the Active Flag on the newer Arrangement will be updated to "Active".

Below are the Active Flag values that are set by the workflow on Arrangements:

Active Flag Values	Descriptions
Pending	Pending approval OR Approved but start date is in the future
Active	Start Date is today or prior to today <b>AND</b> It is open ended with no End Date <b>OR</b> End Date is after today
Inactive	Formerly approved Arrangements with End Date prior to today including Trials ended early. Arrangements that have been Denied or Withdrawn

If you want to query for...

Desired Records	Status	Active Flag	Notes
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## OnBase - Remote Work Arrangement Approver Guide

Arrangements pending approval	Pending Manager Approval Pending Dean/VP Approval Pending HR VP Approval	Pending	Look in your workflow queue. All Arrangements pending your approval will be there. Requests pending other levels of approval will be in the appropriate queues which you may or may not be able to see in the workflow.
Approved Arrangements currently en force	Approved	Active	
Approved Arrangements with future start dates	Approved	Pending	Start date will be a date in the future
Denied Arrangements	Denied by Manager Denied by Dean/VP Denied by HR VP	Inactive	
Approved as Trials currently en force	Approved Trial	Pending	Retrieving based on keyword PER RWA Trial = Y would retrieve any Arrangement that was ever initially approved as a trial no matter its final disposition.
Approved Arrangements that have expired (past end date)	Approved	Inactive	End date will have a value in the past
Withdrawn Arrangements	Withdrawn	Inactive	

### Ending an Approved Arrangement

To end an approved Arrangement, email HRBP with the request to end the Arrangement and the date it should end. Be sure to include the employee's First and Last Name as well as their UID for ease of locating the correct document. Once an approved Arrangement is ended, it will have an End Date on it and the Active Flag will be "Inactive".

### Seeing Prior Arrangements in Related Docs

If a Submitter needs to amend an already approved Arrangement, they will need to submit a new Arrangement. From each of the Approver queues, you will be able to see any prior Arrangements based on the UID of the Submitter. In the recommended Right Viewer Position, the Related Documents window is at the top right and any prior Arrangement will be visible there. Double-clicking on any Arrangement in the Related Documents window will open that document for review. It is recommended to select the split screen icon before double clicking the related document so that it can be seen next to the document pending approval. Clicking the split screen icon again will close the 2<sup>nd</sup> pane.

# OnBase - Remote Work Arrangement Approver Guide

**OnBase**

LIFE CYCLE VIEW WORK FOLDER

Portfolios PER RWA Related Existing RWAs

NAME

Contains...

PER RWA Remote Work Request - [REDACTED] AVALON, LEO - Start: 1/1/2022 - End: 2/1/2022 - WITHDRAWN

PER RWA Remote Work Request - [REDACTED] AVALON, LEO - Start: 12/12/2021 - End: - DENIED BY MANAGER

Items: 2

LIST OF OTHER ARRANGEMENTS BY SAME SUBMITTER

**Inbox**

Drag a column header here to group by that column.

UID	LAST NAME	FIRST NAME
[REDACTED]	AVALON	LEO
[REDACTED]	MIWA	WATKINS
[REDACTED]	FRANK	JESS

Example of viewing a new Arrangement and a prior Arrangement side by side with the split pane icon on.

**OnBase**

LIFE CYCLE VIEW WORK FOLDER

Portfolios PER RWA Related Existing RWAs

NAME

Contains...

PER RWA Remote Work Request - [REDACTED] AVALON, LEO - Start: 1/1/2022 - End: 2/1/2022 - WITHDRAWN

PER RWA Remote Work Request - [REDACTED] AVALON, LEO - Start: 12/12/2021 - End: - DENIED BY MANAGER

Items: 2

Filter: None

**Inbox**

Drag a column header here to group by that column.

UID LAST NAME FIRST NAME

Contains... Contains... Contains...

[REDACTED] AVALON LEO

[REDACTED] MIWA WATKINS

[REDACTED] FRANK JESS

**Remote Work Request**

**BOSTON UNIVERSITY**

**NEW ARRANGEMENT**

Status: PENDING MANAGER APPROVAL

Request Notes

BU ID: [REDACTED] Last Name: AVALON First Name: LEO Email: LAVALON@BU.EDU

Personnel Subarea: NREP-STAFF Job Title: ASSOCIATE DIRECT Manager: LEO AVALON Manager Email: LAVALON@BU.EDU

Org Unit Lvl 4: WALLS Org Unit Lvl 5: DOORS Org Unit Lvl 6: ORG SIX

Employee Group: STAFF-EXEMPT FT Employee Subgroup: SUBGROUP TEXT Master Cost Center: MASTER.COST.TEXT

Prior Agreements

Did you have an approved remote work arrangement prior to March 2020, and if so, are you modifying it?\*

**Remote Work Request**

**BOSTON UNIVERSITY**

**PRIOR ARRANGEMENT**

Status: WITHDRAWN

Request Notes

BU ID: [REDACTED] Last Name: AVALON First Name: LEO Email: LAVALON@BU.EDU

Personnel Subarea: NREP-STAFF Job Title: ASSOCIATE DIRECT Manager: LEO AVALON Manager Email: LAVALON@BU.EDU

Org Unit Lvl 4: WALLS Org Unit Lvl 5: DOORS Org Unit Lvl 6: ORG SIX

Employee Group: STAFF-EXEMPT FT Employee Subgroup: SUBGROUP TEXT Master Cost Center: MASTER.COST.TEXT

Did you have an approved remote work arrangement prior to March 2020, and if so, are you modifying it?\*

Requested Work Schedule

Mon Tue Wed Thur Fri Sat Sun

## OnBase - Remote Work Arrangement Approver Guide

### Trial Arrangements

Trial Arrangements will automatically be returned to the Manager's Approval queue 10 days prior to the scheduled end date of the trial. The original Trial end date will be displayed next to the Signature block on the form and the original Trial approval information is recorded on the Notes tab.

Decisions				
	Name	Decision	Date	This agreement was previously approved as a trial ending on: *
Manager:	<input type="text" value="JO ANN WALSH"/>	<input type="text" value="APPROVED TRIAL"/>	<input type="text" value="08/09/2021"/>	<input type="text" value="08/11/2021"/>
Dean/Vice President or Designee:	<input type="text" value="DEAN VP"/>	<input type="text" value="APPROVED TRIAL W/ CHANG"/>	<input type="text" value="08/09/2021"/>	Length of Trial (days):
VP for Human Resources:	<input type="text" value="BRIAN BATISTA"/>	<input type="text" value="APPROVED TRIAL W/ CHANG"/>	<input type="text" value="08/09/2021"/>	<input type="text" value="24"/>
<input type="button" value="Save"/>				

Since the Trial may subsequently be denied or approved as an open ended agreement, the Notes tab will include a permanent record of the information about the Trial period approvals.

Status:

PENDING MANAGER APPROVAL

Request	Notes
<p><b>Trial Period Information</b></p> <p>This agreement had a trial period from: 9/7/2021 to 8/11/2021.</p> <p>The decisions for the trial period were: Manager: APPROVED TRIAL by JO ANN WALSH on 8/9/2021 Dean/VP: APPROVED TRIAL W/ CHANGES by DEAN VP on 8/9/2021 HR: APPROVED TRIAL W/ CHANGES by BRIAN BATISTA on 8/9/2021</p> <p><b>BE AWARE:</b> Notes entered here will be visible to anyone who has access to this document type, and will be seen by the employee when the Remote Agreement Approval process is complete and a PDF copy of the form is sent to them.</p> <p>Enter a new note (press "Save Note" button to save and timespamp the note):</p> <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>	

### Ending a Trial Early

If a trial needs to be ended early, [contact your HR BP representative](#). Provide text to the HR BP about why the trial is being ended early and the end date of the trial so that HR can accurately enter the information that will be conveyed to the Submitter. They will be able to retrieve the trial Arrangement in the workflow and end it; both the Manager Approver and Submitter will get an email confirming the trial has been ended.

When a trial is ended early, the Remote Work Form will still reflect the original decisions about the trial but it will also display the actual end date of the trial next to the start date, a Denial Reason of "Remote Work Trial Ended", and the Denial Reason text provided to HR. The Arrangement will be made Inactive.

### Reporting Dashboards

There are reporting dashboards available with functionality that allows you to filter, sort, and export Remote Work Arrangement and Approval data. For more information on these, see the RWA Reporting Dashboard QuickStart Guides.

## Help & Support

Should additional assistance be required please contact the Human Resources Service Center at [hr@bu.edu](mailto:hr@bu.edu).

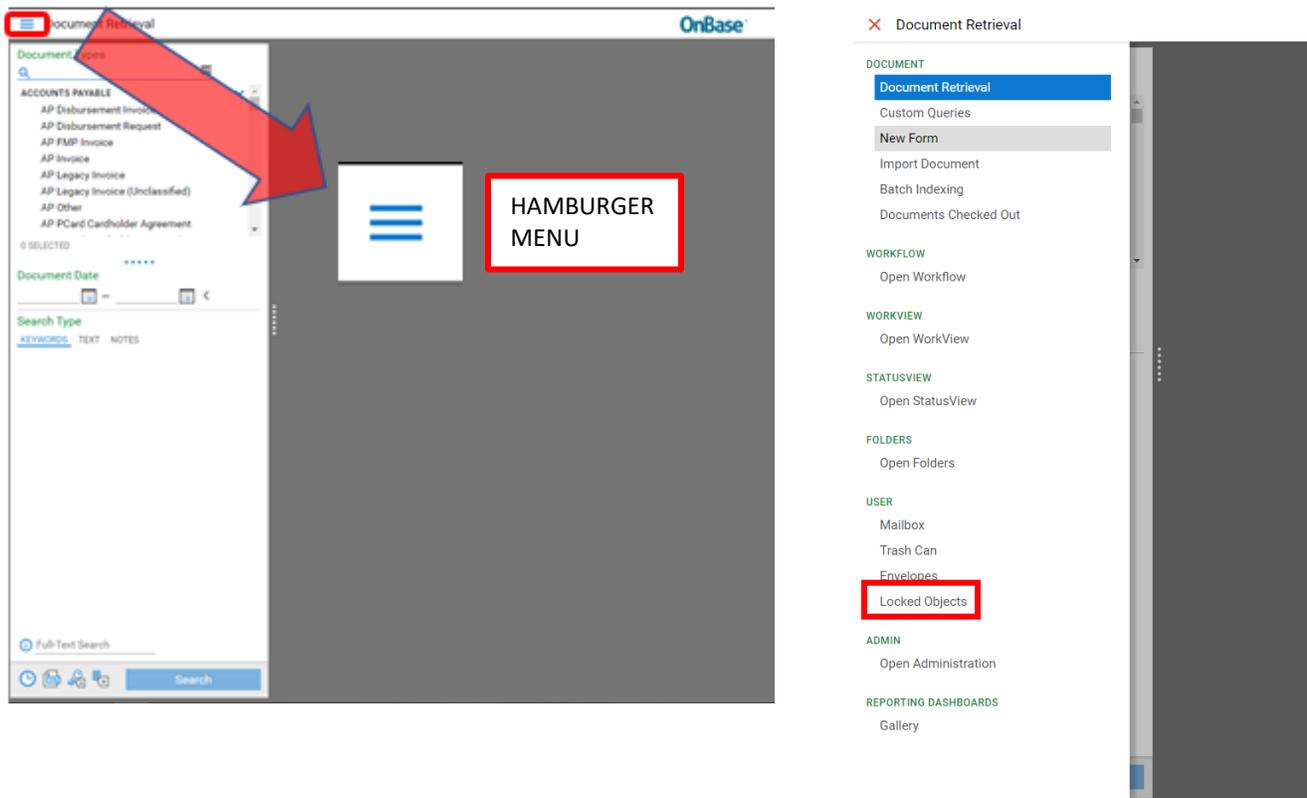
## Appendix A: Locked Documents

When an Arrangement form is viewed on screen in OnBase, it is locked for editing to the first person who opens the document. A subsequent person may view the document simultaneously but will not be able to edit it until the first viewer saves and exits the document.

If an Arrangement is viewed, inadvertently left open on the viewer's screen, or their session is disconnected ungracefully for any reason, the document may remain locked. This prevents that Arrangement from further modification, even by the original person who was modifying it.

If all the fields on the form are greyed out and you are unable to edit the document, it needs to be unlocked.

- 1) If someone else has the document locked, you will have to wait and come back to it later. When they have closed their view of the document the lock will be released.
- 2) Check all your open windows and make sure you do not have another copy of the document open for viewing. Close the windows and/or log out of OnBase and then back in. This will frequently release any extra locks you may have.
- 3) If your session was exited ungracefully, you can release your own document locks. Go to the hamburger menu icon at the top left of the OnBase Web Client and select Locked Objects from the menu.



## OnBase - Remote Work Arrangement Approver Guide

The Locked Objects window will show if there are any Arrangements that are currently locked by you. If a different Approver has a document open, it will NOT appear in this list.

Locked

If the locked Arrangement appears in the Locked Objects list, click to highlight the Arrangement on the list and click Remove Lock at the bottom of the window.

- 4) Failing those steps, all locked documents reset at 6 am each day, so revisit the Arrangement tomorrow.
- 5) If the document is still locked after the overnight reset, send a ServiceNow ticket to the Document Imaging & Management team, mention OnBase and needing an RWA Document Unlocked in the subject line. Specify which document you are having an issue with by the UID.