

REMOTE WORK ARRANGEMENT DASHBOARD QUICKSTART GUIDE

HOW TO ACCESS AND USE THE REMOTE WORK ARRANGEMENT DASHBOARD FOR DEAN/VPS AND MANAGERS

OVERVIEW

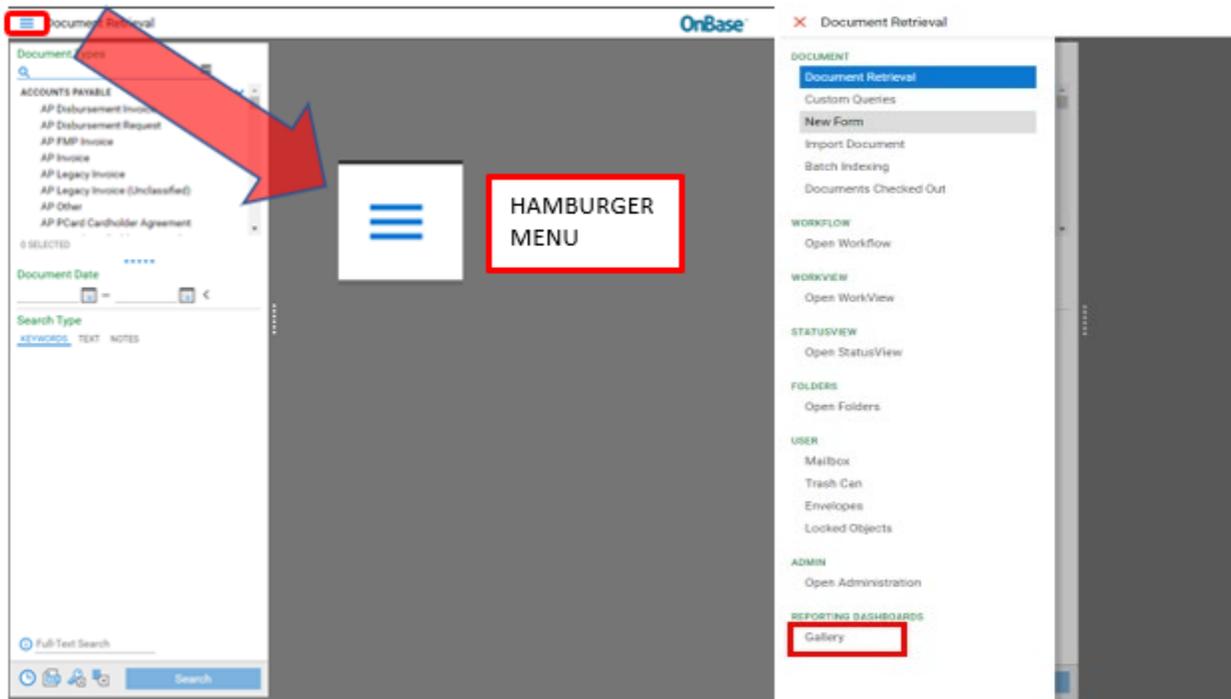
The Remote Work Arrangement process allows BU Employees to submit Arrangements for remote work schedules that must be approved before they can perform part- or full-time remote work. The approval process for these Arrangements is outlined in the [Approvers Guide](#) along with tools to aid the Approvers in their decision making process. The two Dashboards available to the Dean/VP and Manager approvers and their designees, as well as HR VPs give them an overview of Arrangements pending approval and their Submitters in their area that will better inform their decisions to approve, amend, or deny the requests for remote work. These Dashboards are nearly identical and have been optimized per role; this guide serves both dashboards.

Note: If Managers have not received a request for an RWA, there will be no data for the dashboard to return.

GETTING TO THE DASHBOARD

Open the OnBase Web Client by navigating to <https://bu.onbaseonline.com> and sign in. If you do not have access to OnBase, please submit a helpdesk ticket to HR – Information Systems requesting access. The link provided in the email notification for approval cannot be used to access the Dashboards; it must be accessed via the provided link.

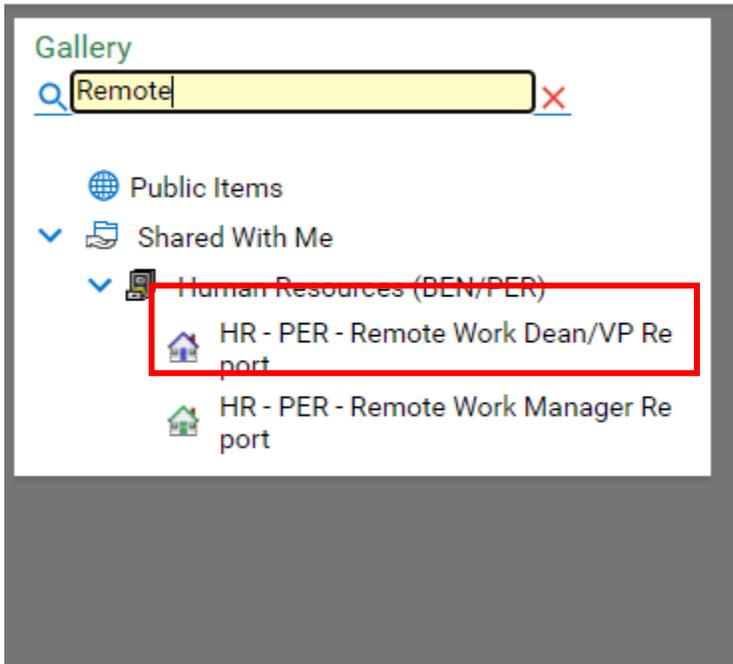
From the OnBase home screen, click the hamburger menu in the top left corner to expand the menu options, then click the Gallery option under the Reporting Dashboards header at the bottom of the list.



In the search bar of the Gallery, type “Remote” and when the list populates, click the HR – PER – Remote Work Dean/VP Report to open the Dean/VP Dashboard. Click the HR – PER – Remote Work Manager Report to open the Manager

Dashboard. If you are having issues with vertical screen real estate, right click on the report and select “Open in New Window” to maximize the available screen space.

Reporting Dashboards



NAVIGATING THE DASHBOARD

HR - PER - Remote Work Dean/VP Report

Export Data Parameters

HR - PER - Remote Work Dean/VP Report

On Remote Days Requested (Active & Pending) Request Status Report Status Employee Remote per Day (Active & Pending) Requests by Remote State

The dashboard is divided into three main sections highlighted with colored boxes:

- Green Box:** Contains four summary charts: a pie chart for 'On Remote Days Requested', a pie chart for 'Request Status Report Status' (with categories like DENIED BY DEAN/VP, APPROVED, DENIED BY HR, WITHDRAWN, DENIED TRIAL ENDED, DENIED BY MANA..., PENDING MANAG..., PENDING DEAN/V...), a bar chart for 'Employee Remote per Day', and a map of the United States for 'Requests by Remote State'.
- Yellow Box:** Contains four filter dropdown menus for 'Remote Work Agreements', 'Request Status', 'Employee Remote per Day', and 'Requests by Remote State'. Below these are four more dropdowns for 'Active, Inactive, Pending', 'Total Days Requested', 'Remote Days per Week Outside MA', and 'Remote Days per Week In MA'.
- Blue Box:** Contains a data table for 'Remote Work Agreements'.

UID	First Name	Last Name	Org Unit Lvl 6	Start Date	Status	Active?	Remote Total (In/Out)	Remote Days in MA	Remote Days outside MA	Manager	Manager Decision	Dean/VP Decision	Denial Reason	Dean/VP Decision Entered By	Dean/VP Decision Date	Request Number
U00000001	HIGH	ACHIEVER	ORG SIX	9/1/2020	APPROVED	Inactive	1 (1,0)	F		LEO AVALON	APPROVED	APPROVED	NEW AGREEMENT SIGNED	ALEXANDRA MUHS	8/6/2021	23910817
U00000001	HIGH	ACHIEVER	ORG SIX	9/1/2021	APPROVED	Inactive	2 (0,2)		TH,F	LEO AVALON	APPROVED	APPROVED	NEW AGREEMENT SIGNED	CHLOE MILHOUS	8/9/2021	23910828
U00000001	HIGH	ACHIEVER	ORG SIX	9/15/2021	APPROVED	Active	3 (3,0)	M,TU,W		LEO AVALON	APPROVED	APPROVED		ALEXANDRA MUHS	8/10/2021	23911108

Count = 31

This is the Reporting Dashboard. The dashboard is made up of three distinct blocks:

Charts Block

- Qty Remote Days Requested (Active & Pending) pie chart visualizes the number of Arrangements that have been submitted requesting 1, 2, 3, 4, or 5 remote work days. Only days from Arrangements that are Active or Pending will be displayed.
- Request Qty per Doc Status pie chart shows the quantity of Arrangements per Arrangement Status
 - Approved
 - Pending Manager Approval
 - Pending Dean/VP Approval
 - Pending HR VP Approval
 - Denied by Manager
 - Denied by Dean/VP
 - Denied by HR VP
 - Approved Trial
 - Withdrawn
 - Denied Trial Ended
- Employees Remote per Day (Active & Pending) is a bar chart that shows how many employees per day are working remotely. Only days from Arrangements that are Active or Pending will be displayed.
 - Note: If a Manager changes the requested days on a request and saves the changes, but does not click Done, they will need to click the Update Changed Days of the Week button on the Workflow for the changed days to appear correctly here on the Dashboard.
- Requests by Remote State is a map chart that shows which states are listed as the remote work address on Arrangements and how many Arrangements there are per state.

Filters Block

There are six filters that can be used to manipulate the data that is returned in the Charts Block and the Data Block. As you filter, there is a count at the bottom of the dashboard which shows how many records exist with the selected parameters.

- **Requests by Employee Manager** allows the data to be filtered by each manager name and shows only the requests pending for the selected manager(s). A manager will only see their name in this filter.
- **Org Unit Lvl 5** filters the data by Org Unit Lvl 5
- **Org Unit Lvl 6** filters the data by Org Unit Lvl 6
- **Status** filters the data by status of the Arrangements
- **Active, Inactive, Pending** filters the data by the Arrangements Active Flags.
- **Total Days Requested** filters the data by the Arrangements total requested remote days, both in and out of state
- **Remote Days per Week Outside MA** filters the data by the number of remote days selected outside MA
- **Remote Days per Week in MA** filters the data by the number of remote days selected in MA

Data Block.

The Data Block is a list of all of the Arrangements applicable to the Dean/VP viewing the dashboard. Each of the column headers can be filtered from A-Z or Z-A by clicking on the header. This data can be limited based on the filters above. Removing the filters will return the filtered-out data to view.

IMPORTANT: The difference between the Status and Active Flags is very important and understanding this will help you utilize this dashboard more comfortably. The table below details the Status and Active Flag the most commonly queried Arrangements will have. Adjusting the filters for Status and Active Flags will yield these results.

Desired Records	Status	Active Flag	Notes
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	

EXPORTING DATA

The screenshot shows the OnBase interface with the following elements:

- OnBase Logo:** Top left corner.
- User Profile:** Top right corner, showing a star icon, an envelope icon, a trash icon, and the name "Jessica Frank" with a dropdown arrow.
- Navigation:** Below the user profile, there are buttons for "Export Data" (highlighted in blue), "Parameters", an information icon (i), and a refresh icon.
- Dashboard Widgets:**
 - Doc Status:** A pie chart showing document status distribution. A callout indicates "VP: 4" and another indicates "APPROVED: 9".
 - Employees Remote per Day (Active & Pending):** A bar chart showing the number of days for three categories. The y-axis is labeled "Days" with values 20 and 30.
 - Requests by Remote State:** A map of the United States with state abbreviations (OR, ID, WY, ND, MN, WI, CA, NV, UT, CO, NE, IA, IL, KS) and a red pin indicating a location in the Northeast.

Exporting data can be done once the data is filtered the way you need it to be. In the top right of the dashboard is an Export Data button that will generate an Excel spreadsheet of the data requested.