

How to get to the OnBase Electronic PDF forms to complete

1. Go to [My Fresno State Portal](#) and **SIGN IN**.

- a. Click on the **Forms Portfolio** tile.



- b. Click on the **Electronic Form** that you want to submit. This will take you directly to the OnBase form you selected.

A screenshot of the 'Forms Portfolio' page. The page has a left sidebar with 'Fresno Forms Portfolio' and 'Manage Forms'. The main content area is titled 'Forms Portfolio' and includes a 'Help Documentation' section with a 'User Guide for Forms Portfolio' link. Below this is a table of forms categorized by 'Employee' and 'Finance'. A red arrow points from the 'Adjusting Budget Journal (ABJ)' form in the 'Finance' section to the 'Electronic Form' column. A red circle with a white 'b' is placed over the 'Adjusting Budget Journal (ABJ)' form. The table lists various forms such as 'Business Traveler Account', 'Travel Application', 'Travel Expense Claim', 'Adjusting Budget Journal (ABJ)', 'Departmental Deposits', 'Direct Pay & Hospitality Approval', 'Financial Signature Approval', 'Non-Payroll Expenditure/Revenue Transfer Request Form (TOE)', 'Petty Cash Fund / Change Fund Authorization', 'Petty Cash Voucher', 'Purchase Alteration', 'Purchase Requisition', 'Request for Billing', 'Stockroom Requisition', 'Transfer of Payroll Expenditures (TOP)', 'Trust Fund Approval', and 'Trust Fund Approval - Inquiry'. Each row includes a star icon, the form name, the form type (Electronic Form or Forms Application), a brief description, and a 'Details...' link.

2. Enter all the information for the electronic form.

- a. Click on the **“Submit”** button at the bottom of the form once completed.



NOTE: After the form is submitted, you will be redirected to OnBase “**Fresno State**” status view where you can launch additional forms, see OnBase items that require your attention or search for OnBase documents See the section titled Fresno State Status View Dashboard below for more details.

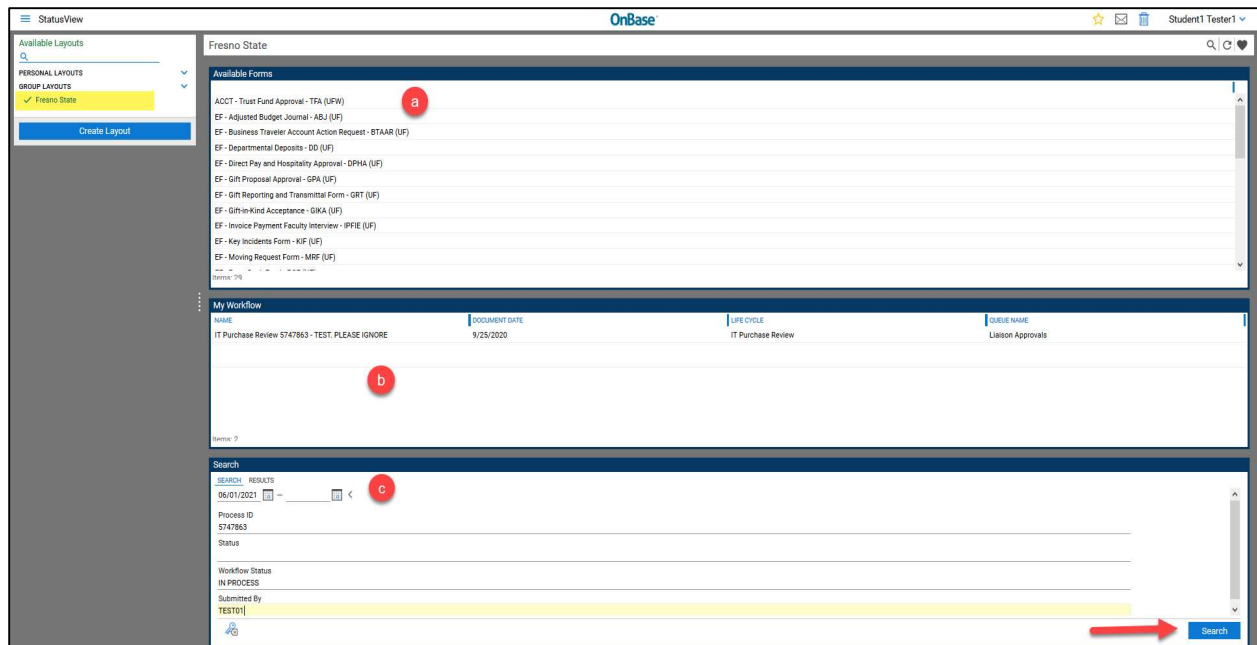
- b. You will automatically get an email notification which includes a download link for the pdf version of the form. Click on the “**Download**” link to print or save a copy of the form.

NOTE: The download link will expire within 48 hours.



Fresno State Status View Dashboard

1. The Fresno State Status View Dashboard provides a quick view in three sections: Available Forms, My Workflow, and Search.
 - a. **Available Forms:** Displays all forms that can be submitted. Double click on the form you want to submit.
 - b. **My Workflow:** Displays all workflow items that you need to review for approval. Double click on the workflow item you want to review.
 - c. **Search:** Gives you the ability to search for specific forms. You have the option to filter the search by document date, Process ID, Status, Workflow Status, Submitted By (login username not your full display name). Click on the Search button once you have filled in the search criteria.

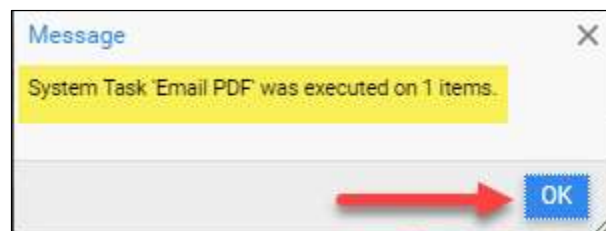


How to Resend an Email copy

1. If you are **NOT** already logged in to the **OnBase Web Client**.
 - a. Go to the [OnBase Web Client](#)
 - b. Type your Fresno State username and password, click the **Login** button.

2. Once you are logged into OnBase you will be directed to the OnBase **“Document Retrieval”** page.
 - a. Click on **“Document Retrieval”**
 - b. Under the Forms Search bar enter **“Electronic”** and it will take you to a list of all the available electronic forms. Scroll down until you find the form that you are looking for and Click on the form.
3. In the **Search Type** you have the option to search for pdf forms by document date, Process, ID, Submitted By (login username not your full name), Submitted Full Name, and Submit Date. Click on the **“Search”** button at the bottom.
 - a. In the **Document Search Results** in the right panel the pdf forms that match your search criteria will be displayed. Scroll down until you find the pdf form you are looking for. **Double** click on the pdf form. The pdf form will display on the bottom of the screen.
4. Place the cursor on the bottom where the form is displayed.
 - a. Right click. Click on **“Work System Tasks”** and then **“Email Pdf”**.

- b. A display message window indicating, “Email PDF” was executed on 1 items. Click on the “OK” button to close the window.



How to make a copy of an existing PDF form.

5. Go to **Main Menu** at the top right navigation bar Document Retrieval.
 - a. Click on “**Document Retrieval**”
 - b. Under the Forms Search bar enter “**Electronic**” and it will take you to a list of all the available electronic **PDF** forms. Scroll down until you find the form that you are looking for and Click on the form.
 - c. In the **Search Type** you have the option to search for pdf forms by document date, Process, ID, Submitted By (login username not your full name), Submitted Full Name, and Submit Date. Click on the “**Search**” button at the bottom.
 - d. In the **Document Search Results** in the right panel the pdf forms that match your search criteria will be displayed. Scroll down until you find the pdf form you are looking for. **Double** click on the pdf form. The pdf form will display on the bottom of the screen.
 - e. Place the cursor on the bottom where the form is displayed. Right click. Click on “**Work System Tasks**” and then “**Copy My Form**”. The copied form will be displayed.

Document Retrieval a

Document Types b

ELECTRONIC

EF - Travel Application (domestic and international) - tap (uf)

EF - Travel Expense Claim - TEC (UF) c

FINANCIAL AID

FA - CAD (Electronic Form)

1 SELECTED

Document Date

06/07/2021

Search Type

KEYWORDS NOTES

Process ID

Submitted By

UF - Travel Expense De...

Submitter Full Name

Date Submitted

MM/dd/yyyy

Copy Action

Search

OnBase

Pawn Sayphengsy

Document Search Results

Drag a column header here to group by that column.

| DOCUMENT NAME | DOCUMENT DATE |
|--|---------------|
| Process ID: 5802789 Submitted By: PAWN SAYPHENGSI EF - Travel Expense Claim - TEC (UF) Submitted On: 9/1/2021 | 9/1/2021 |
| Process ID: 5802787 Submitted By: PAWN SAYPHENGSI EF - Travel Expense Claim - TEC (UF) Submitted On: 9/1/2021 | 9/1/2021 |
| Process ID: 5802776 Submitted By: PAWN SAYPHENGSI EF - Travel Expense Claim - TEC (UF) Submitted On: 8/31/2021 | 8/31/2021 |
| Process ID: 5802774 Submitted By: PAWN SAYPHENGSI EF - Travel Expense Claim - TEC (UF) Submitted On: 8/31/2021 | 8/31/2021 |

Items: 6

FRESNO STATE
Discovery. Diversity. Distinction.

Travel Expense Claim

Claimant Info

We need some information about the claimant

Name: Pawn Testing

Emplid: 12174

Position:

Workflow System Tasks e

Copy My Form

f. You can make any updates to the form.

- Check **“Ready to submit”** once the form is completed & click on the **“Submit”** button.
- Check **“Discard”** and click Submit if you want to cancel the form.

☒ **Ready to submit** i ☐ **Discard** ii

Submit

How to Delete an Electronic Form From Your Search Display

1. If you are **NOT** already logged in to the **OnBase Web Client**.
 - a. Go to the [OnBase Web Client](#)
 - b. Type your Fresno State username and password, click the **Login** button.

b

Username:

Password:

☐ Warn me before logging me in to other sites.

Login

For security reasons, quit your web browser when you are done accessing services that require authentication!

2. Once you are logged into OnBase you will be directed to the OnBase **“Document Retrieval”** page.
 - a. Click on **“Document Retrieval”**

- b. Under the Forms Search bar enter **“Electronic”** and it will take you to a list of all the available electronic forms. Scroll down until you find the form that you are looking for and Click on the form.
 3. In the **Search Type** you have the option to search for pdf forms by document date, Process, ID, Submitted By (login username not your full name), Submitted Full Name, and Submit Date. Click on the **“Search”** button at the bottom.
 - a. In the **Document Search Results** in the right panel the pdf forms that match your search criteria will be displayed. Scroll down until you find the pdf form you are looking for. **Double** click on the pdf form. The pdf form will display on the bottom of the screen.
 4. Place the cursor on the bottom where the form is displayed.
 - a. Right click. Click on **“Work System Tasks”** and then **“Delete”**.

The screenshot shows the OnBase Document Retrieval interface. On the left, the 'Document Types' sidebar has 'Electronic' selected (2.b). Below it, the 'Search Type' dropdown is set to 'Document Date' (3). The 'Search' button is at the bottom of the sidebar. The main panel displays 'Document Search Results' for 'Departmental Deposits' (3.a). A right-click context menu is open over the document, with 'Work System Tasks' selected (4) and 'Delete' highlighted (4.a).

- a. A display message window indicating, **“Are you sure you want to delete this document. This action can not be undone.”** Click on the **“OK”** button to confirm deletion. When you refresh the page, you will no longer see the deleted item in the Document Search Results panel.

The screenshot shows a 'Workflow System Tasks' dialog box. It contains a yellow warning message: **Are you sure you want to delete this document. This action can not be undone.** An arrow points to the 'OK' button.