



PROFESSIONAL SERVICE CONTRACTS EXECUTIVE/DIRECTORIAL ORDER SOLUTION

User Guide

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Version Control

Document Attributes

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Author	Solution Engineer

Introduction and Overview

Welcome to the City of Lincoln Professional Service Contracts Executive/Directorial Order Solution end-user training Guide. In this course, you will learn the entire Professional Service Contracts Workflow process in OnBase Web Client & Unity Client - the primary Enterprise Content Management applications used by the State of Nebraska and the City of Lincoln.

This document contains information for utilizing the PCA & PSC Request and Coordination Workflow and working documents through the Workflow.

OnBase is a robust application, used in many different ways within the City of Lincoln, with new solutions being added on a regular basis. Therefore, this guide cannot cover all of the potential ways that City of Lincoln - or individual divisions - will utilize the program. Additionally, your rights and privileges may not allow you to complete all of actions within this document. Contact your OnBase Administrator for additional information on specific modules, functionality, or custom OnBase solutions.

OnBase Web Client - Logging In

Role: Developer's Engineer or any Public user requesting Professional Service Contracts

Software

OnBase Web Client

Public user access

Production URL: <https://ecmp.nebraska.gov/AppNet/Login.aspx>

City of Lincoln Employees

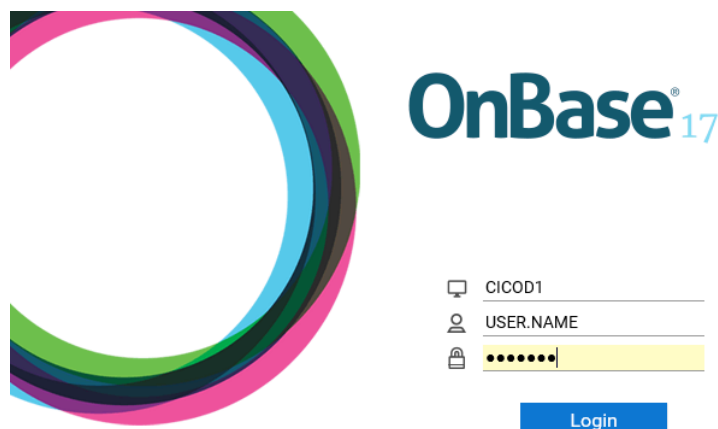
Login with network credentials

Production URL: <https://ecmcol.lincoln.ne.gov/AppNet/Login.aspx>

Test URL: <https://ecmcatcol.lincoln.ne.gov/AppNet/Login.aspx>

Public User Instructions:

1. Solution pre-requisites:
 - a. Public User defined within the Nebraska Enterprise Content Management System.
If this is the first time utilizing or need to change your password, visit:
<https://enterpriseregistration.nebraska.gov/SelfRegistration.aspx>
 - b. Public User has been provided access:
If this is your first time accessing the City of Lincoln PSC request system, the City of Lincoln will need to provide your user access to the solution. To request access, email Michaela Dugan at mdugan@lincoln.ne.gov and Victoria L. Keating at VKeating@lincoln.ne.gov the username defined in Step #1.
2. Once confirmation has been provided that you have access or if you were granted access previously, visit <https://ecmp.nebraska.gov/AppNet/Login.aspx> and login with your credentials defined in Step #1.



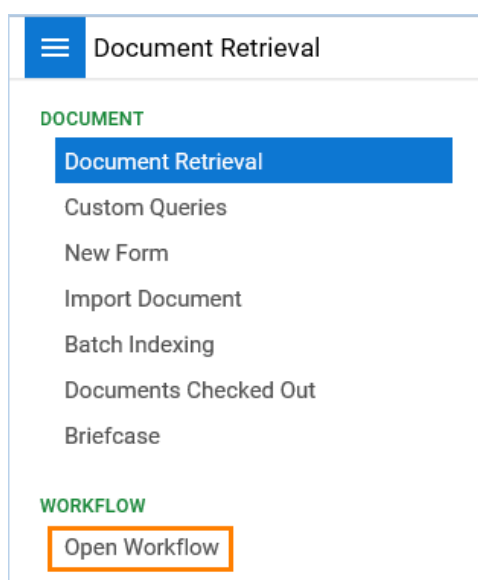
- a. By **Domain**, retain **CICOD1**
- b. By **Username**, your **Active Directory User Name** (Network login) may already be populated
- c. By the **Password**, enter your **Active Directory (Network) password**. (this is case sensitive)

3. Click **Login**.

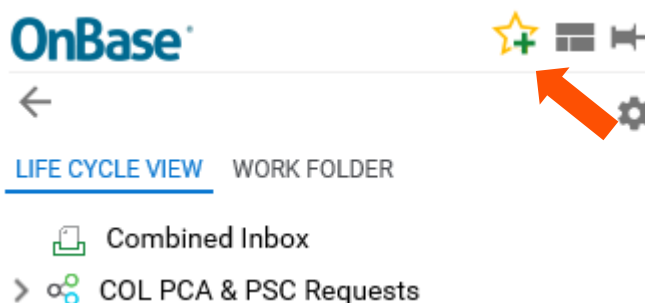
Web Client - COL Professional Services Contract Requests

Personalizing Your Work Space

1. You will be logged into OnBase Web Client. To start a new request, you will need to access Workflow. Select the drop-down arrow to the right of **Document** and select **Workflow**. Workflow will display in a new browser window.



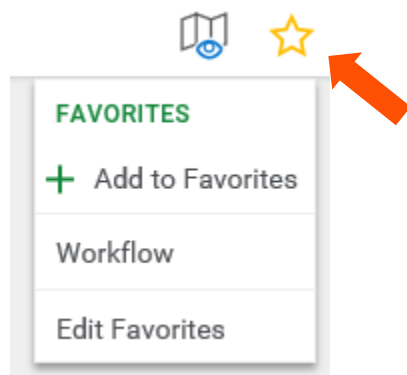
2. To reduce steps needed to access Workflow, the next time you login, we recommend that you add Workflow as a Favorite. While in Workflow, in the **Life Cycle View** tab, select the star icon to the right of the OnBase logo.



- a. Select **OK** when prompted to Add to Favorites.

3. Close the current Workflow browser window by clicking the X in the top-right corner of the screen.

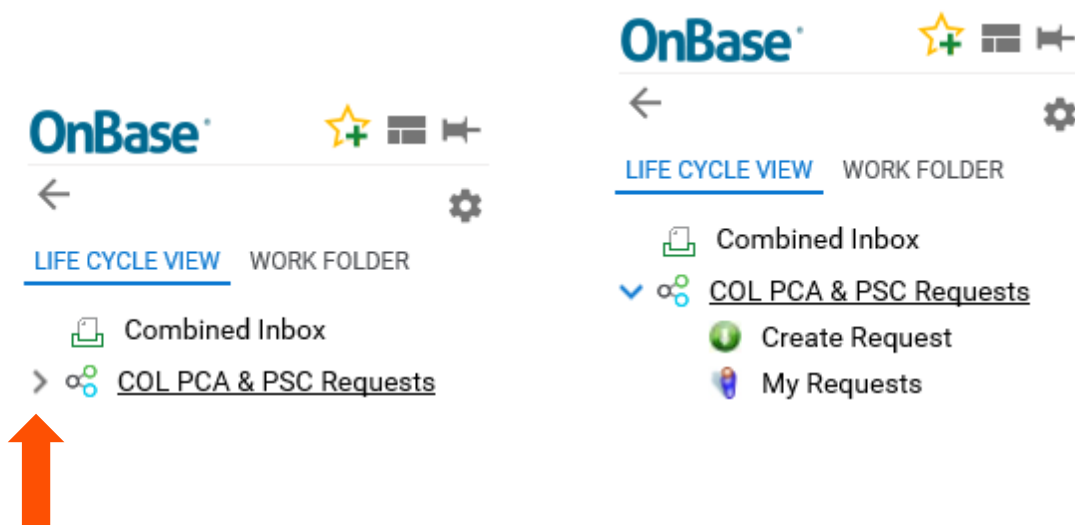
- While on the initial OnBase window, click the star to see the Workflow favorite that you just created. Click the Favorite you just added.



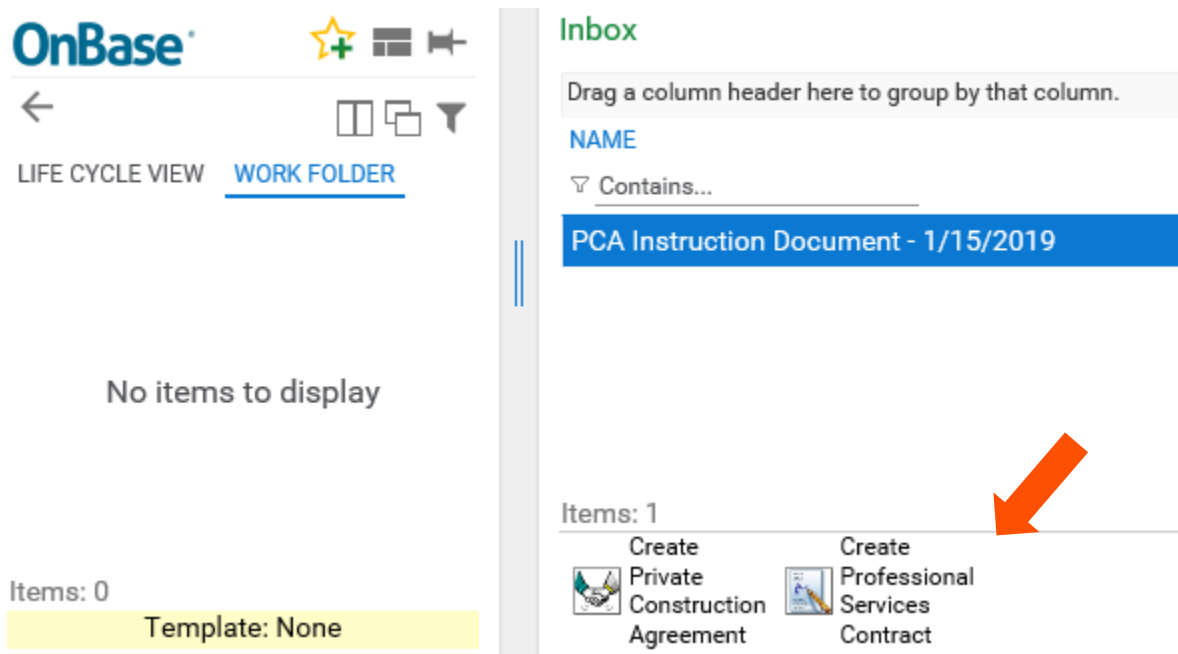
- Workflow displays in a new browser window.

Starting a New Request

- Select the arrow to the left of **COL PCA & PSC Requests** in the Life Cycle View pane to show **Create Request** and **My Request** Workflow queues.



- Click on the **Create Request** folder.
- Select the **Create Professional Services Contract** button at the bottom of the Inbox pane and wait for the task to execute.



4. A message displays prompting you to select your Firm from the list of Qualified Firms.

Inbox

User Interaction

Only pre-qualified construction management and inspection firms are listed in the "Qualified Firm" dropdown. If your firm is not listed, you would need to work with City of Lincoln's Purchasing Department on becoming a pre-qualified construction management and inspection firm prior to continuing.

Qualified Firm:

Submit

Cancel

5. After selecting submit, another message displays with a notification saying that a Professional Services Contract Request form has been created and you can find it in the **My Requests Queue**. Click **OK**.

Inbox

User Interaction

A Professional Services Contract Request form has been created. This Request Form will reside in your 'My Requests Queue' where you can complete and submit for Approval.

OK

Working with My Requests

1. Select the **Life Cycle View** tab to display the Workflow queues.

OnBase®

LIFE CYCLE VIEW WORK FOLDER

No items to display

Items: 0

Template: None

Inbox

Drag a column header here to group by that column.

NAME	ENTRY DATE
COL PCA EO Instruction Document - 2/7/2018	2/7/2018 10:35:29 AM

Items: 1

Create Request

2. Select the **My Requests** folder.

OnBase®

LIFE CYCLE VIEW WORK FOLDER

Combined Inbox

COL PCA & PSC Requests

Create Request

My Requests

3. The new request form will display in the **Inbox** pane with the **Document Date** populated. The **Document Date** is based on the date the **Create Professional Services Contract** button was activated. Select the document in the **Inbox** and the City of Lincoln - Professional Services Contract request form will display below the **Inbox** pane.

Inbox

Drag a column header here to group by that column.

PROJECT NAME	DOCUMENT DATE	PUBLIC USERNAME	PERMITTEE BUSINESS NAME	FIRM BUSINESS NAME	CLASSIFICATION	SURETY TYPE	STATUS
	4/8/2019	COLPCAREQUESTER		Lamp, Rynearson & Associates, Inc.	PROFESSIONAL SERVICES CONTRACT		Awaiting Submission

Items: 6

Submit Attach Insurance Certificate Attach Fee Schedule Attach Supporting Document Notify COL of Updated Attachment (s) Remove Request

4. Input request information into the Request Form and click the **Save** button either at the top or bottom of the request form. You may want to do this periodically if you will have the form open for more than five minutes.

City of Lincoln E.O./D.O. Request Form for Professional Services Contract

Request Information and Approvals	Tracking History	Documents Included With Final E.O./D.O.															
<p>Questions Completing this form? Contact Coordinator at 402-441-7558</p> <p>Status Awaiting Submission</p> <p>Select Add button to add additional contacts to this request. These additional contacts will also be included in notifications sent with this project.</p> <table border="1"> <thead> <tr> <th colspan="4">Additional Contacts</th> <th>Add</th> </tr> <tr> <th>Business Name</th> <th>First Name</th> <th>Last Name</th> <th>Email</th> <th></th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Save</p>			Additional Contacts				Add	Business Name	First Name	Last Name	Email						
Additional Contacts				Add													
Business Name	First Name	Last Name	Email														

5. Prior to submitting a Professional Services Contract Request form to the City of Lincoln, the following tasks are available:



- **Submit** - Utilized to submit the request form and associated documentation to the City of Lincoln. Only use this option when the request form is complete and ready for submission.
- **Attach Insurance Certificate** - Utilized to attach an Insurance Certificate to your request.
- **Attach Fee Schedule** - Utilized to attach a Fee Schedule to your request.
- **Attach Supporting Document** - Utilized to attach supporting documentation pertinent to your request.
- **Notify COL of Updated Attachments(s)**: Utilized to notify the City of Lincoln of any updated attachments added after submission.
- **Remove Request** - Utilized to remove any request forms that were accidentally created or no longer needed(only available before the form has been submitted).

When selecting an **Attach...** button, the following interaction will display:

Select **Browse** > Windows **Choose File to Upload** window will display > browse to your file's location > select **Open** > select the **Upload** icon.

Inbox

User Interaction

FILE PATH

 Browse...

Document Types

COL EODO Insurance Certificate

File Type

<Select File Type>

Document Date

04/08/2019 

Import

Cancel Import

6. When the Request form is complete and ready for submission to the City of Lincoln, click the **Submit** button. The following interaction with conditions will display:

Inbox

User Interaction

Is this PSC Request Form complete, accurate, and ready for processing?

- Information input on the request form below will be utilized for contract drafting.
- If you would like to verify data once more, click the 'Cancel' button to review.
- If you're ready for the contract document to be generated, select the 'Generate Contract' button below.
- When 'Generate Contract' is selected, you and the Developer listed on the form will receive an email from DocuSign.
- The DocuSign email will contain a link to electronically review and sign the PS Contract from the Engineer perspective.
- The Developer will receive a Contract Acceptance signature page and copy of the PS contract to review.

Generate Contract

Cancel

If you select **Generate Contract**, OnBase will process your request. This process may take a minute. Wait for the following prompt to display. Click **OK** and close OnBase windows.

Inbox

User Interaction

'Your Professional Services Contract Request has been submitted. Within a few minutes, instructions will be emailed for next steps. You can close the OnBase windows at this time.'

OK

7. Within a few minutes of submission, the Permittee and Engineer indicated on the request form will receive an email from DocuSign to electronically sign their part of the Professional Services Contract.

OnBase Unity Client - Logging In

1. Double click on the **Unity Client** icon

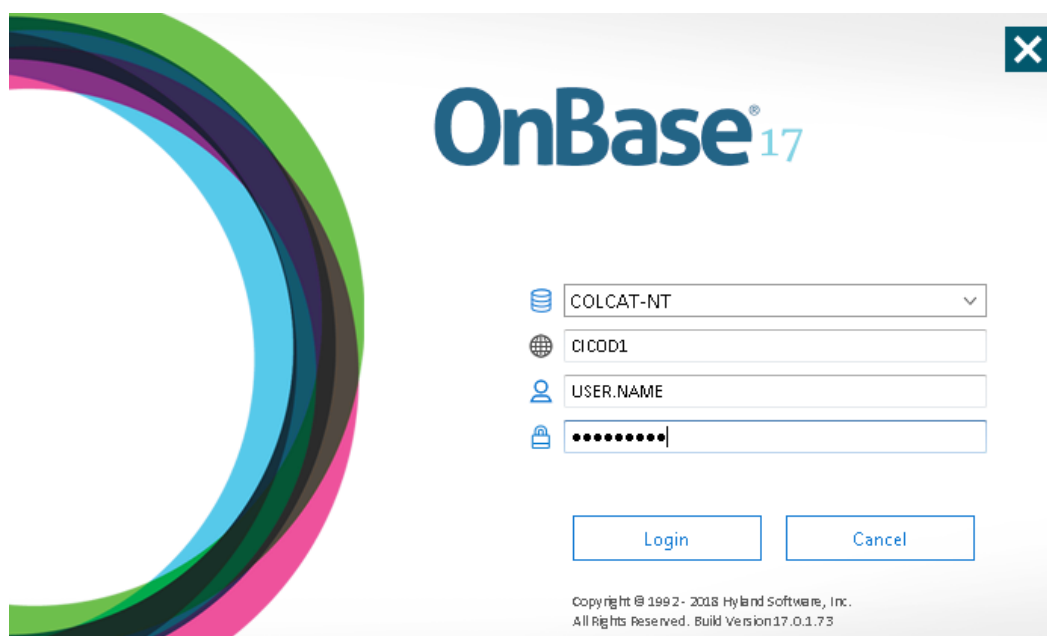





Note: You may have two OnBase icons on your desktop. Unity Client PROD and CAT.

PROD: OnBase access to the Production (PROD) environment.

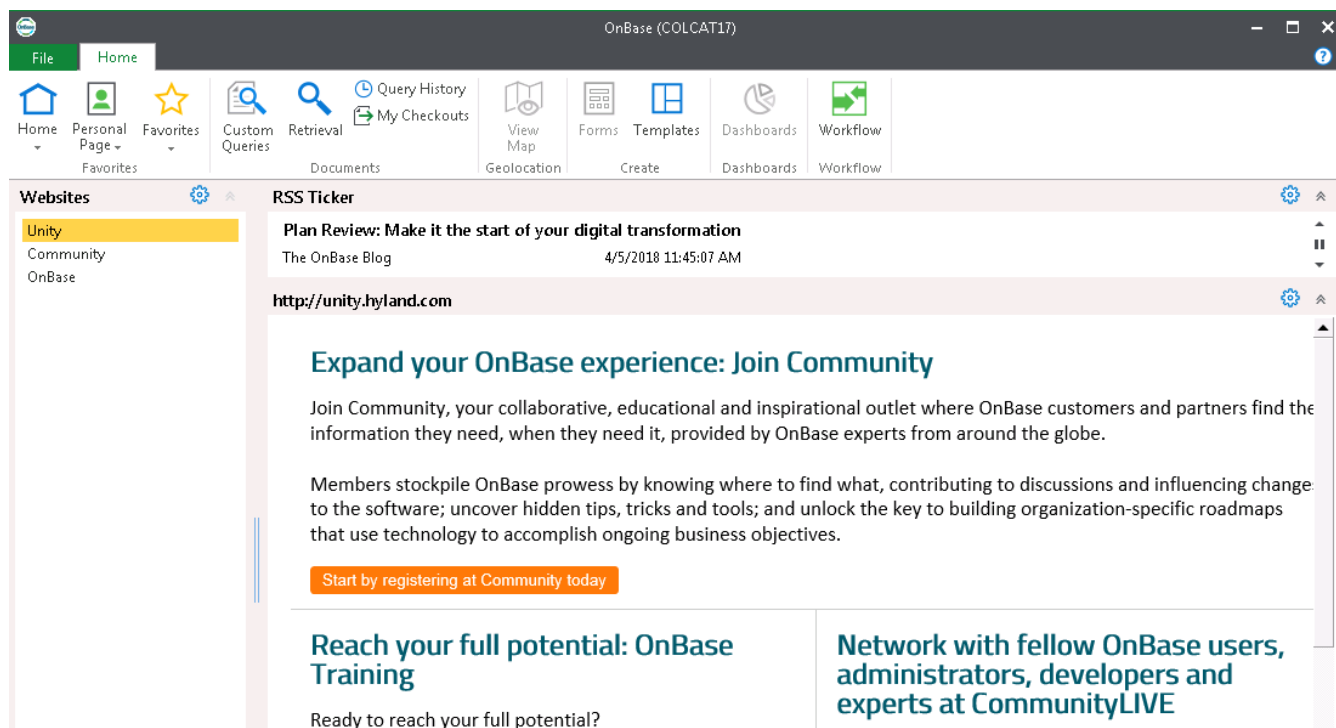
CAT: OnBase access to the Customer Acceptance Testing (CAT) environment.

2. The OnBase login screen will appear.



- a. By the  icon, retain **CICOD1**
- b. By the  icon, your **Active Directory User Name** (Network login) may already be populated
- c. By the  icon, enter your **Active Directory (Network) password**. (this is case sensitive)

3. Click **Login**.
4. OnBase Unity Client will load, taking you to the Home screen.



OnBase has various tabs across the top of the screen. Each tab contains a ribbon of icons (similar to Microsoft Office products).

⇒ **NOTE:** The tabs and icons you see and can use are controlled by your user's assigned rights. This document will cover a small segment of these tabs and icons.

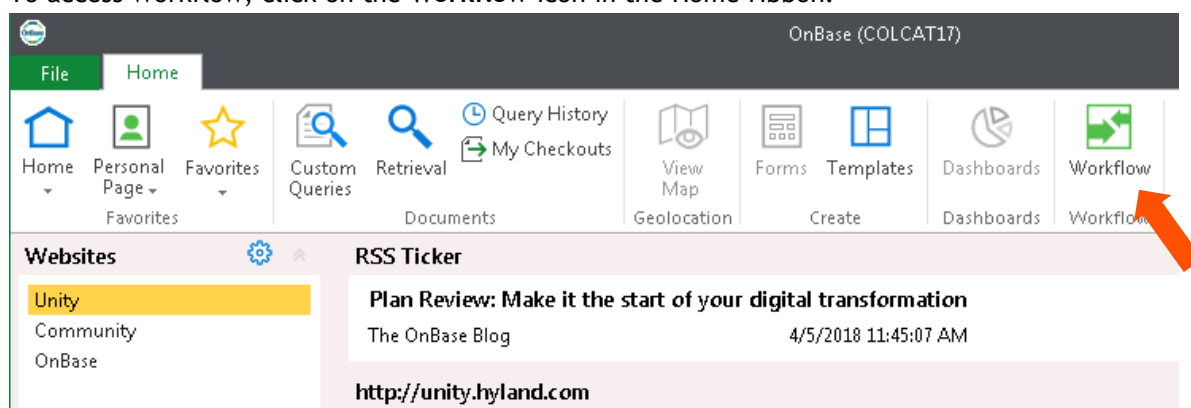
COL PCA & PSC Coordination

Coordinator

Role: City of Lincoln PSC Coordinator

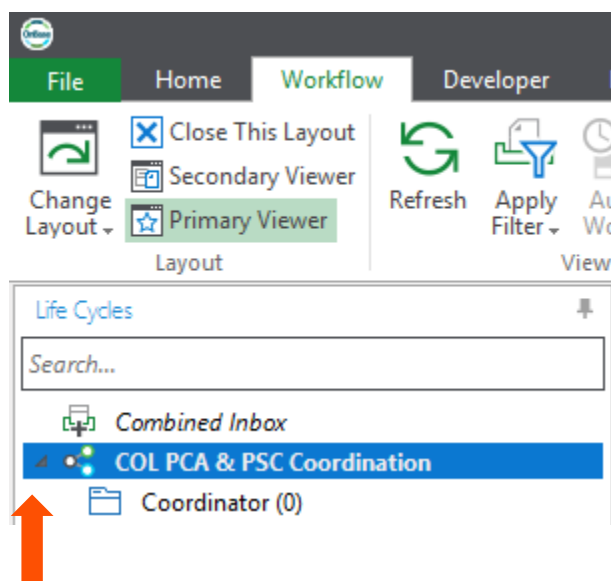
Active Directory/OnBase User Group: COL EODO Coord-LTU PCA

1. Users defined within the **COL EODO Coord-LTU PCA** group will be notified via email when a new PSC Request form has entered their queue.
2. The user will need to access OnBase Unity Client and login with their CICOD1 network credentials.
3. To access Workflow, click on the **Workflow** icon in the Home ribbon.



4. To view the queues you have access to, expand **COL PCA & PSC Coordination** lifecycle.

NOTE: The number in parenthesis at the end of the queue name indicates the number of items waiting your process step.



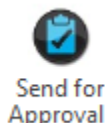
5. Select a City of Lincoln - Professional Services Contract Request form from the **Inbox** pane.
6. Review the Request form.
7. If you need to request documentation from the PSC Requestor, you can use the **Request Documentation** task.



- a. Once you click the **Request Documentation** button, a message will display asking if you have entered instructions for the Requestor in the Coordinator Comments box on the request form.
 - b. If you have, click 'Yes'. An email will be sent to contacts on the PSC Request form. The email includes the text input from the Coordinator Comments box.
 - c. If you have not, click 'No' or 'Cancel'. An email will not be sent and you will be returned to the PSC Request form to input Coordinator comments.
8. Once the Developer's Acknowledgement and Signature Page have been signed, the status on the request form will change to **PSC Documents Signed**. A timer will then kick off to automatically create the Draft Executive or Directorial Order depending on the amount of the contract (EO if $\geq 25k$ and DO if $< 25k$).
9. After the Draft EO or DO has been created, the status will change to **PSC Executive Order Created** or **PSC Directorial Order Created**.
10. The coordinator will then have the ability to recreate the EO or DO if necessary by using the following tasks:



11. Click the **Send for Approval** task to route the form for approval in the **COL E.O./D.O. Approval** lifecycle.



At the end of the Approval/Review process the executed E.O. or D.O. are routed back to the PSC Coordinator.

Below are other tasks that are available to the PSC Coordinator before sending the Request for approval:

12. The PSC Coordinator has the ability to attach any supporting documentation to the form by using the **Upload Supporting Documents** task.



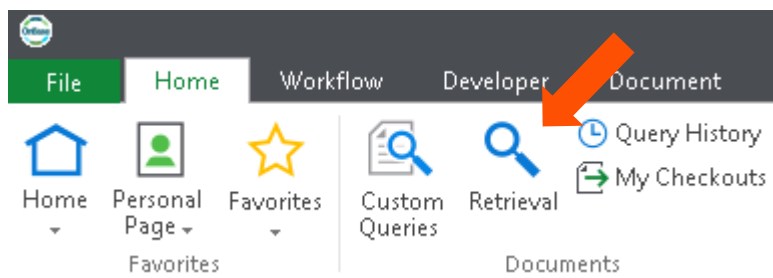
An upload window will open that allows you to find the supporting documentation on your computer and upload it as a related item to the request form.

13. If a PSC Request form needs to be withdrawn or voided, you can use the **Withdraw/Void Request** task to remove the form from the OnBase Workflow.



- a. When clicked, a message will appear asking if you have entered a reason for withdrawing or voiding the request in the **Coordinator Comments** box.
 - If you have, click **Yes**. Another message will appear asking if you are sure you want to withdraw or void the request.
 - Click **Withdraw** if the PSC Requestor wants to withdraw the request.
 - Click **Void** if the City of Lincoln is voiding the request.
 - Select **Cancel** if you want to stop the process of withdrawing or voiding the request.
 - If you have not, click **No** or **Cancel** to return to the form and enter the comments.
- b. If **Developer Acknowledgement** or **Signature Page** documents were created and submitted to DocuSign, those documents must be voided from DocuSign.
 - Right-click on the **Developer Acknowledgement** and **Signature Page** in the Related Items pane. Select DocuSign and Void.
 - A message appears asking for a reason for the void. Type a reason in the comment field and click **OK**.
- c. The Withdraw/Void process will remove the PSC Request form from Workflow and update the form's status to either **Withdrawn** or **Voided**.

NOTE: Documents removed from Workflow can still be reviewed by using the **Retrieval** task on the Home ribbon.



COL E.O./D.O. Approval

Department Queue

Upon logging in with a user that is part of a Department user group, the user will have access to one workflow queue within the COL E.O./D.O. Approval life cycle; **Department**. This queue is load balanced to only show those E.O./D.O. request forms that are assigned to that department.

Life Cycles

Search...

- Combined Inbox
- COL E.O./D.O. Approval
- Department (1)**

After the Coordinator approves the request from the COL PCA & PSC Coordination life cycle, the request will enter this queue before being sent for concurrent approval from the Department Signer, Law and Department Director(if DO). Once all concurrent approvals are complete, the request form will either transition to the Mayor's queue for Executive Orders or straight to the City Clerk queue for Directorial Orders.

File Home Workflow Developer Document

Change Layout Close This Layout Secondary Viewer Primary Viewer Refresh Apply Filter Auto Work Override Auto-feed Route Item Take Ownership Release Ownership Execute Script Task Complete Review Request Additional Info Upload Fast Facts

Life Cycles

Search...

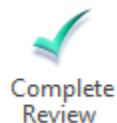
- Combined Inbox
- COL E.O./D.O. Approval
- Department (1)**

Id	Status	COL EODO Rush	Requesting Department	Requesting Department Conf	Classification	Co
	Awaiting Approval		TRANSPORTATION AND UTILI	Michaud, Adam	PROFESSIONAL SERVICES COI	TR

Department

Inbox User Interaction

Ad Hoc: Complete Review



This task requires the department representative to enter comments and check the 'Department Approved' check box on the request form. Once these steps have been complete, the *Complete Review* task will remove the item from the Department queue and mark the request as approved by the department.

Department

Comments input within the section below are viewable to the Requester

Department test comments

☒ Department Approved

Department Approver: COLEODODepLTUPCATest

Approved Date: 02/05/2019

Ad Hoc: Request Additional Info



Request Additional
Info

This task will send the request form back to the **My Request** queue for the coordinator to review and resend for approval.

Ad Hoc: Upload Fast Facts



Upload Fast
Facts

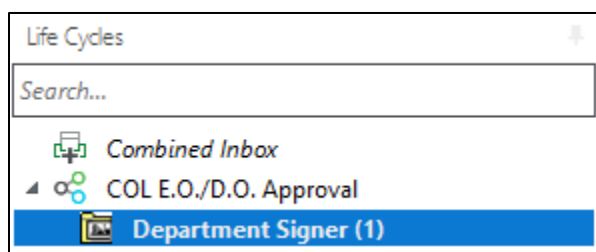
Upload Fast Facts functions similar to the *Upload Supporting Documents* task but defaults the document type to COL EODO Fast Facts.

Once the document upload is complete, it will be located in the 'Related Items' window of workflow.

Related Items	
<div> <div>Display</div> <div>Template</div> <div>Filter</div> <div>Tasks</div> <div>Export</div> </div>	
Icon	Name
	Contract - 2/4/2019
	Fast Facts - 2/4/2019

Department Signer Queue

Upon logging in with a user that is part of a Department Signer user group, the user will have access to one workflow queue within the COL E.O./D.O. Approval life cycle; **Department Signer**. This queue is load balanced to only show those E.O./D.O. request forms that are assigned to that department.

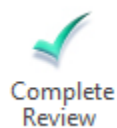


After the Department User approves the request, the request will enter this queue for concurrent approval from the Department Signer, Law and Department Director(if DO). Once all concurrent approvals are complete, the request form will either transition to the Mayor's queue for Executive Orders or straight to the City Clerk queue for Directorial Orders.

The screenshot shows the Onbase Workflow interface. The top ribbon includes tabs for File, Home, Workflow, Developer, and Document. The Workflow tab is active, showing a ribbon with icons for Change Layout, Close This Layout, Secondary Viewer, Primary Viewer, Refresh, Apply Filter, Auto Work, Override Auto-feed, Route Item, Take Ownership, Release Ownership, Execute Script Task, Complete Review, Request Additional Info, and Upload Fast Facts. The 'Complete Review' task is highlighted with a green checkmark icon. Below the ribbon, the 'Life Cycles' sidebar is visible, showing the 'Department Signer (1)' queue selected. The main area displays an 'Inbox' table with the following data:

Icon	Status	COL EODO	Requesting Department	Requesting Department Conl	Classification
	Awaiting Approval		TRANSPORTATION AND UTILIT	Michaud, Adam	PROFESSIONAL SERVICES CONTRACT

Ad Hoc: Complete Review



This task requires the department signer representative to enter comments and check the 'Department Signer Approved' check box on the request form. Once these steps have been complete, the *Complete Review* task will remove the item from the Department Signer queue and mark the request as approved by the department signer.

Department Signer		
Comments <div>Test Comments</div>		
<input checked="" type="checkbox"/> Department Signer Approved	Department Signer Approver <div>COLEODODeptSignerLTUPCA</div>	Approved Date <div>02/06/2019</div>

Ad Hoc: Request Additional Info



Request Additional
Info

This task will send the request form back to the **My Request** queue for the coordinator to review and resend for approval. If there are concurrent approvals when this task is selected, the user will be prompted with the below message.

User Interaction

Please select which departments will re-review the E.O./D.O. request?

If All Departments Re-review is selected, all other reviewer approvals will be removed and they will be notified of the re-review request.

If My Department Re-review is selected, other reviewers' approval process will not be affected.

If you've selected this in error, select the Cancel button.

All Departments Re-review

My Department to Re-review

Cancel

Inbox

User Interaction

If **All Departments Re-Review** is selected, all other reviewer approvals will be removed from their current queues and they will be notified of the re-review request.

If **My Department Re-review** is selected, all other reviewer approvals will remain in their current queues and they can continue on with the approval process. The status of the reviewer approval form for the department that selected the task will be changed to Requested Info and will not allow the user to select any additional tasks until the information they have requested has been received.

If **Cancel** is selected, then the reviewer approval form and all related reviewer approval forms will not be affected.

Ad Hoc: Upload Fast Facts



Upload Fast Facts functions similar to the *Upload Supporting Documents* task but defaults the document type to COL EODO Fast Facts.

The screenshot shows the 'Upload Fast Facts' dialog box. The 'Document Type' dropdown is highlighted with a red box and set to 'COL EODO Fast Facts'. Other fields include 'File type', 'Document Date' (02/04/2019), and 'Keywords' (COL-Tracking Number: 80809218). The 'Import' button is visible at the bottom left.

Once the document upload is complete, it will be located in the 'Related Items' window of workflow.

Related Items	
Display	Template Filter Tasks Ex
Icon	Name
	Contract - 2/4/2019
	Fast Facts - 2/4/2019

Law

Upon logging in with a user that is part of the **COL EODO Law** user group, the user will have access to one workflow queue within the COL E.O./D.O. Approval life cycle; **Law**. This queue is load balanced to only show those E.O./D.O. request forms that are assigned to that department.

Life Cycles

Search...

- Combined Inbox
- COL E.O./D.O. Approval
- Law (7)**

After the Department User approves the request, the request will enter this queue for concurrent approval from the Department Signer, Law and Department Director(if DO). Once all concurrent approvals are complete, the request form will either transition to the Mayor's queue for Executive Orders or straight to the City Clerk queue for Directorial Orders.

File Home Workflow Developer Document

Change Layout Close This Layout Secondary Viewer Primary Viewer Refresh Apply Filter Auto Work Override Auto-feed Route Item Take Ownership Release Ownership Execute Script Task Complete Review Request Additional Info Upload Fast Facts

Life Cycles

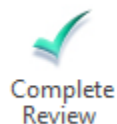
Search...

- Combined Inbox
- COL E.O./D.O. Approval
- Law (8)**

Inbox

Id	Assigned To	Status	COL EODO Rush	Requesting Department Conl	Requesting Department
	Don W. Taute	Awaiting Approval	RUSH	DARYL.ELLER	TRANSPORTATION AND UTILITIES
	Jocelyn W. Golden	Awaiting Approval		Daryl Eller	PARKS & RECREATION
	Abigail F. Littrell	Awaiting Approval		COLEODOCoordPCATest	TRANSPORTATION AND UTILITIES - RIGHT-OF-WAY MANAGEMENT
	Abigail F. Littrell	Awaiting Approval		COLEODOCoordPCATest	TRANSPORTATION AND UTILITIES - RIGHT-OF-WAY MANAGEMENT
	Abigail F. Littrell	Awaiting Approval		COLEODOCoordPCATest	TRANSPORTATION AND UTILITIES - RIGHT-OF-WAY MANAGEMENT
	Abigail F. Littrell	Awaiting Approval		COLEODOCoordPCATest	TRANSPORTATION AND UTILITIES - RIGHT-OF-WAY MANAGEMENT
	Don W. Taute	Awaiting Approval		Michaud, Adam	TRANSPORTATION AND UTILITIES - RIGHT-OF-WAY MANAGEMENT
	Don W. Taute	Awaiting Approval		COLEODOCOORDDESCETEST	TRANSPORTATION AND UTILITIES

Ad Hoc: Complete Review



This task requires the Law representative to enter comments and check the 'Law Approved' check box on the request form. Once these steps have been complete, the *Complete Review* task will remove the item from the Law queue and mark the request as approved by the Law department.

Law

Comments

Test Comments

☒ Law Approved

Law Approver

COLEODOLawTest

Approved Date

02/06/2019

Ad Hoc: Request Additional Info



Request Additional
Info

This task will send the request form back to the **Coordinator** queue for the coordinator to review and resend for approval. If there are concurrent approvals when this task is selected, the user will be prompted with the below message.

User Interaction

Please select which departments will re-review the E.O./D.O. request?

If All Departments Re-review is selected, all other reviewer approvals will be removed and they will be notified of the re-review request.

If My Department Re-review is selected, other reviewers' approval process will not be affected.

If you've selected this in error, select the Cancel button.

All Departments Re-review

My Department to Re-review

Cancel

Inbox

User Interaction

If **All Departments Re-Review** is selected, all other reviewer approvals will be removed from their current queues and they will be notified of the re-review request.

If **My Department Re-review** is selected, all other reviewer approvals will remain in their current queues and they can continue on with the approval process. The status of the reviewer approval form for the department that selected the task will be changed to Requested Info and will not allow the user to select any additional tasks until the information they have requested has been received.

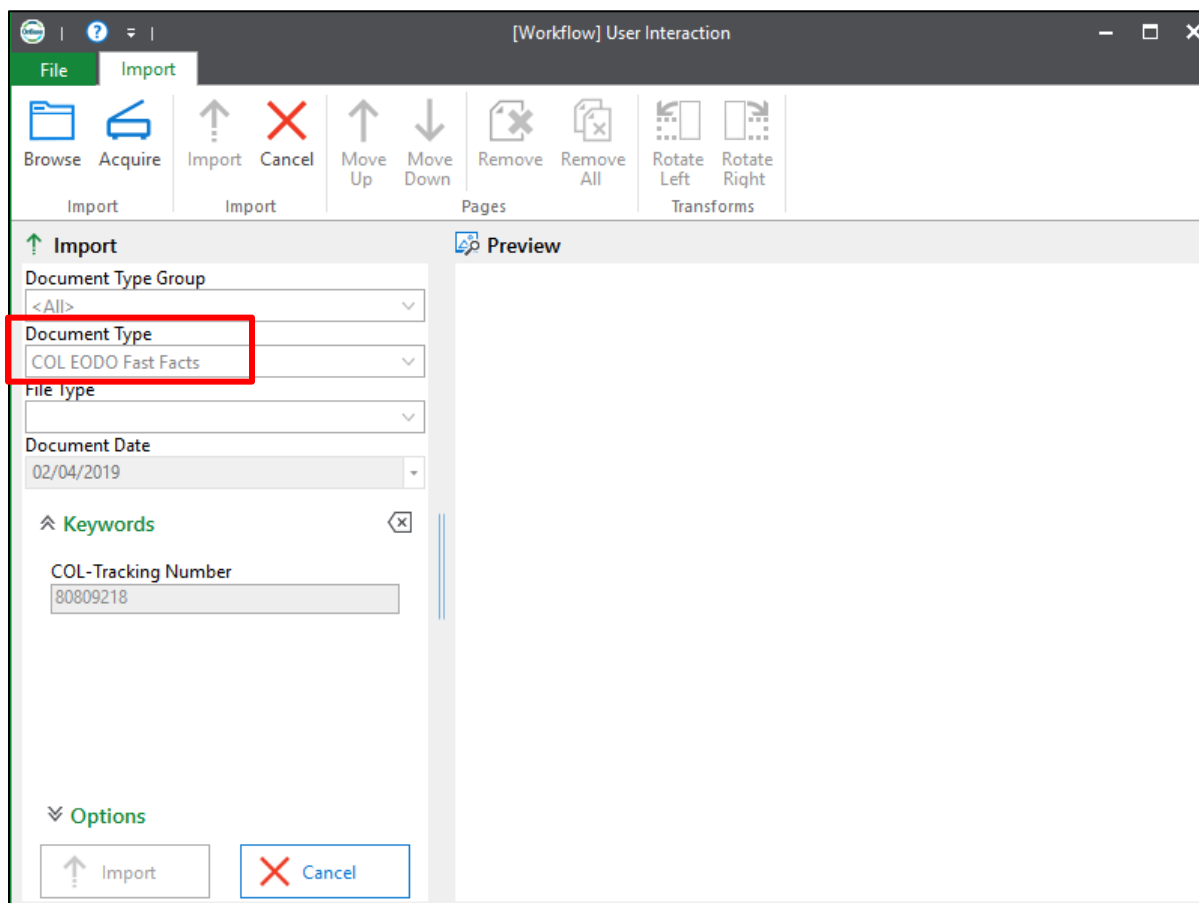
If **Cancel** is selected, then the reviewer approval form and all related reviewer approval forms will not be affected.

Ad Hoc: Upload Fast Facts

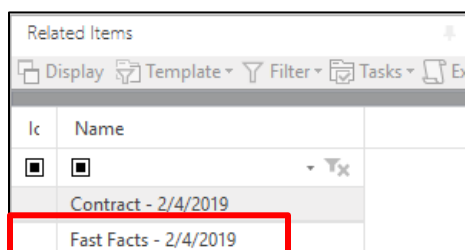


Upload Fast
Facts

Upload Fast Facts functions similar to the *Upload Supporting Documents* task but defaults the document type to COL EODO Fast Facts.

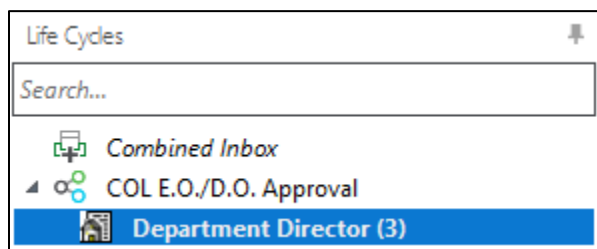


Once the document upload is complete, it will be located in the 'Related Items' window of workflow.



Department Director Queue

Upon logging in with a user that is part of a Department Director user group, the user will have access to one workflow queue within the COL E.O./D.O. Approval life cycle; **Department Director**. This queue is load balanced to only show those E.O./D.O. request forms that are assigned to that department.

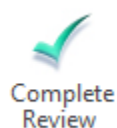


After the Department User approves the request, the request will enter this queue for concurrent approval from the Department Signer, Law and Department Director(if DO). Once all concurrent approvals are complete, the request form will either transition to the Mayor's queue for Executive Orders or straight to the City Clerk queue for Directorial Orders.

The screenshot shows the Onbase Workflow ribbon with the 'Complete Review' task selected. The ribbon includes tabs for File, Home, Workflow, Developer, and Document. The Workflow tab is active, showing various tasks like 'Close This Layout', 'Secondary Viewer', 'Primary Viewer', 'Refresh', 'Apply Filter', 'Auto Work', 'Override Auto-feed', 'Route Item', 'Take Ownership', 'Release Ownership', 'Execute Script Task', 'Complete Review', 'Request Additional Info', and 'Upload Fast Facts'. The 'Complete Review' task is highlighted with a green checkmark icon.

Life Cycles	Inbox																								
Search...																									
Combined Inbox																									
COL E.O./D.O. Approval																									
Department Director (3)																									
	<table border="1"> <thead> <tr> <th>Id</th> <th>Assigned To</th> <th>Status</th> <th>COL EODO Rush</th> <th>Requesting Department</th> <th>Requesting Department Cont</th> </tr> </thead> <tbody> <tr> <td></td> <td>Miki Esposito</td> <td>Awaiting Approval</td> <td></td> <td>TRANSPORTATION AND UTILI</td> <td>COLEODOCoordPCATest</td> </tr> <tr> <td></td> <td>Miki Esposito</td> <td>Awaiting Approval</td> <td></td> <td>TRANSPORTATION AND UTILI</td> <td>COLEODOCoordPCATest</td> </tr> <tr> <td></td> <td>Miki Esposito</td> <td>Awaiting Approval</td> <td></td> <td>TRANSPORTATION AND UTILI</td> <td>Michaud, Adam</td> </tr> </tbody> </table>	Id	Assigned To	Status	COL EODO Rush	Requesting Department	Requesting Department Cont		Miki Esposito	Awaiting Approval		TRANSPORTATION AND UTILI	COLEODOCoordPCATest		Miki Esposito	Awaiting Approval		TRANSPORTATION AND UTILI	COLEODOCoordPCATest		Miki Esposito	Awaiting Approval		TRANSPORTATION AND UTILI	Michaud, Adam
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	Miki Esposito	Awaiting Approval		TRANSPORTATION AND UTILI	Michaud, Adam																				

Ad Hoc: Complete Review



This task requires the department Director representative to enter comments and check the 'Department Director Approved' check box on the request form. Once these steps have been complete, the *Complete Review* task will remove the item from the Department Director queue and mark the request as approved by the department Director.

The screenshot shows the 'Department Director' form. It includes a 'Comments' section with a text area containing 'Test Comments'. Below the comments, there is a 'Director Approved' checkbox which is checked. To the right of the checkbox, there are two fields: 'Director Approver' with the value 'COLEODODeptDirectorLTUTest' and 'Approved Date' with the value '02/06/2019'.

Ad Hoc: Request Additional Info



This task will send the request form back to the **My Request** queue for the coordinator to review and resend for approval. If there are concurrent approvals when this task is selected, the user will be prompted with the below message.

User Interaction

Please select which departments will re-review the E.O./D.O. request?

If All Departments Re-review is selected, all other reviewer approvals will be removed and they will be notified of the re-review request.

If My Department Re-review is selected, other reviewers' approval process will not be affected.

If you've selected this in error, select the Cancel button.

All Departments Re-review **My Department to Re-review** **Cancel**

Inbox User Interaction

If **All Departments Re-Review** is selected, all other reviewer approvals will be removed from their current queues and they will be notified of the re-review request.

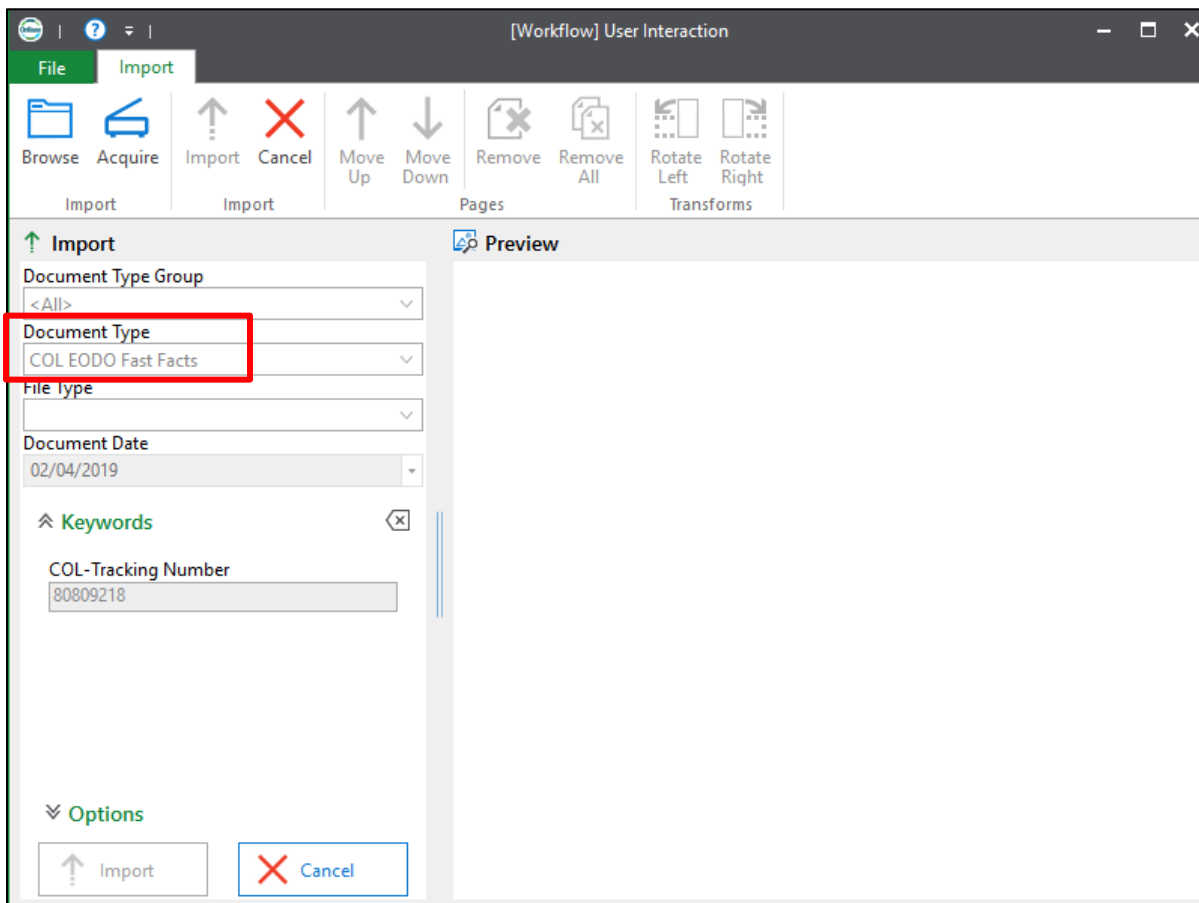
If **My Department Re-review** is selected, all other reviewer approvals will remain in their current queues and they can continue on with the approval process. The status of the reviewer approval form for the department that selected the task will be changed to Requested Info and will not allow the user to select any additional tasks until the information they have requested has been received.

If **Cancel** is selected, then the reviewer approval form and all related reviewer approval forms will not be affected.

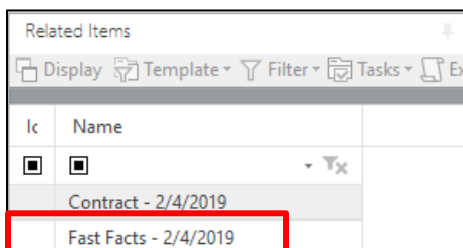
Ad Hoc: Upload Fast Facts



Upload Fast Facts functions similar to the *Upload Supporting Documents* task but defaults the document type to COL EODO Fast Facts.

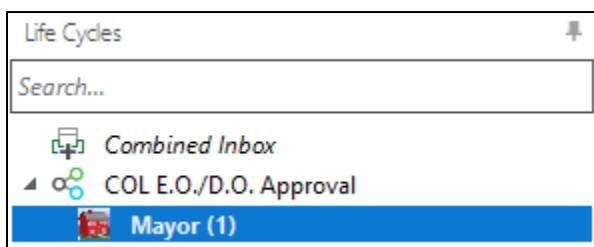


Once the document upload is complete, it will be located in the 'Related Items' window of workflow.



Mayor

Upon logging in with a user that is part of the Mayor's user group, the user will have access to one workflow queue within the COL E.O./D.O. Approval life cycle; **Mayor**.



All Executive Orders will need to be approved by the Mayor. All Directorial Orders will bypass the Mayor and Mayor's Office queues and go straight to the City Clerk for final completion steps. The Request Forms will enter this queue upon the completion of the Department Signer and Law review and approvals.

The screenshot shows the 'Queue Administration' tab in a software application. The interface includes a top navigation bar with tabs: File, Home, Workflow, Developer, Document, and Queue Administration. Below the navigation bar is a toolbar with various icons for actions like 'Close This Layout', 'Secondary Viewer', 'Primary Viewer', 'Refresh', 'Apply Filter', 'Auto Work', 'Override Auto-feed', 'Route Item', 'Take Ownership', 'Release Ownership', 'Execute Script Task', 'Approved', and 'Request Info'. The main area is divided into two panes. The left pane, titled 'Life Cycles', contains a search bar and a list of items: 'Combined Inbox', 'COL E.O./D.O. Approval', and 'Mayor (1)'. The right pane, titled 'Inbox', displays a table with the following data:

Id	Status	COL EODO Rush	Requesting Department	Requesting Department Cont	Classification
	Awaiting Approval		TRANSPORTATION AND UTILI	ADAM.MICHAUD	CONSTRUCTION AGREEMENT

The Mayor will have access to the Executive Order document within the Related Items window. This document is a merged PDF document containing all related documents to the request.

The screenshot shows the 'Related Items' window. It has a toolbar with icons for 'Display', 'Template', 'Filter', 'Tasks', and 'Ex'. Below the toolbar is a table with the following data:

Id	Name
	Executive Order - - 2/4/2019

Upon review, the Mayor will have the option to enter any comments prior to approving the Executive Order request. The Mayor does not need to check the Mayor Approved box as this will be auto-populated by the ad hoc task *Approve*.

The screenshot shows the 'Mayor' approval form. It has a section for 'Comments' with a text area. Below the text area is a checkbox labeled 'Mayor Approved'. To the right of the checkbox are two input fields: 'Mayor Approver' and 'Approved Date'.

Ad Hoc: Approve



The *Approve* task will remove the request form from the Mayor queue and mark the request as approved by the Mayor. Upon approval, the Mayor will be prompted with a message box asking if they are sure they would like to approve this request. By selecting **Yes**, the request will move to the Mayor's Office queue for further action. By selecting **No**, the request will remain in the Mayor's queue.

User Interaction

Are you sure you want to approve this request?

Yes No

Ad Hoc: Request Info

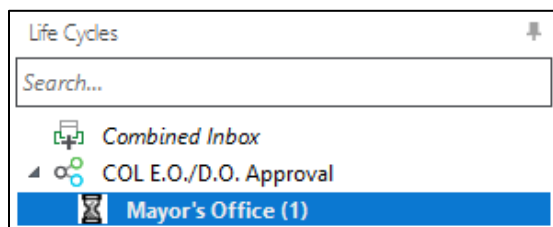


Request
Info

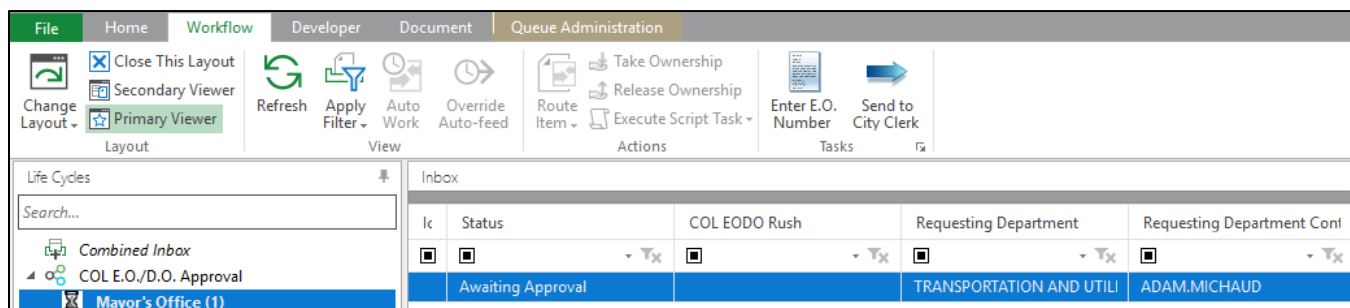
This task will send the request form back to the **My Request** queue for the coordinator to review and resend for approval. This will require the coordinator and all other departments to re-review the request. Upon re-review, the coordinator and all other departments will need to re-approve the request.

Mayor's Office

Upon logging in with a user that is part of the Mayor's Office user group, the user will have access to one workflow queue within the COL E.O./D.O. Approval life cycle; **Mayor's Office**.



Once the Mayor has approved the request, the form is then sent to the Mayor's Office queue for review. Within this queue, the Mayor's Office has the capability to add an E.O. Number for the executive order and send the request to the City Clerk.



Ad Hoc: Enter E.O. Number



Enter E.O.
Number

The *Enter E.O. Number* task will prompt the Mayor's office to enter an Executive Order Number and click **Submit**.

User Interaction

Please enter the Executive Order Number:Executive Order Number

Upon clicking submit a new draft E.O. will be created with the E.O. Number and displayed for the Mayor's Office to review.

Ad Hoc: Send to City Clerk

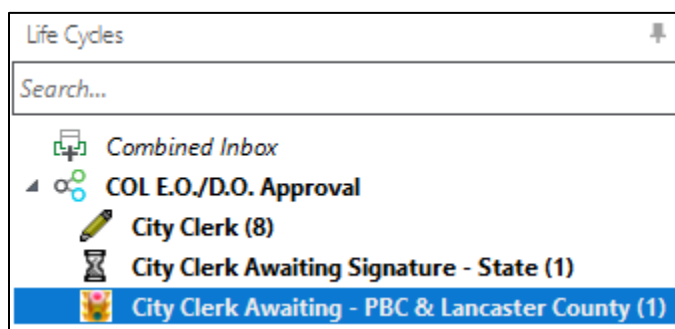


Send to
City Clerk

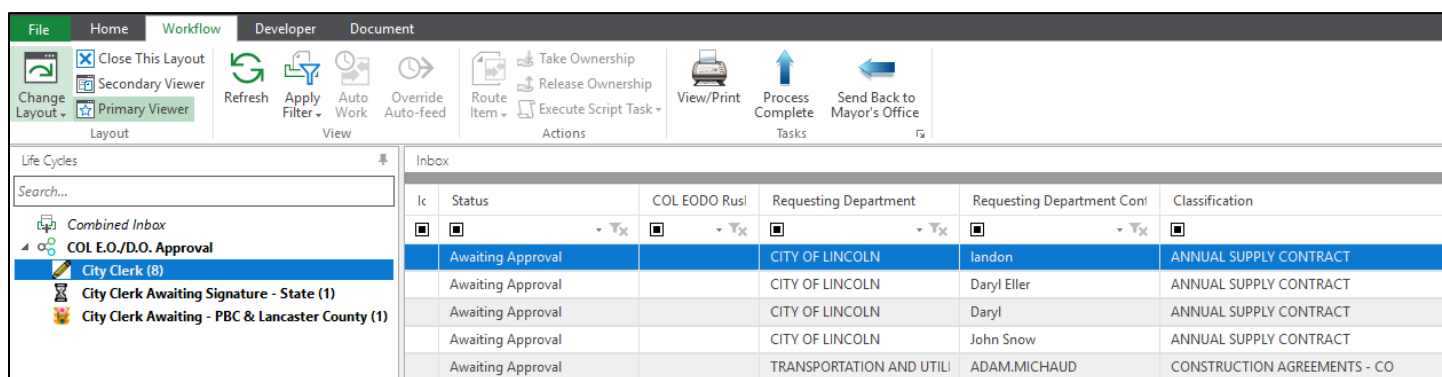
The *Send to City Clerk* task will mark the request form as reviewed by the Mayor's Office and transition the document to the City Clerk queue for further review.

City Clerk

Upon logging in with a user that is part of a City Clerk user group, the user will have access to three workflow queues within the COL E.O./D.O. Approval life cycle; **City Clerk**, **City Clerk Awaiting Signature - State**, and **City Clerk Awaiting - PBC & Lancaster County**. They will only need to reference the 'City Clerk' queue for all Professional Services Contracts.



The City Clerk will generate the final E.O. or D.O. and complete the final review or send the request back for further review before completing the process.



Ad Hoc: View/Print



The **View/Print** task will create the final Executive or Directorial Order. First OnBase will prompt the user to determine which City Clerk signature is needed to complete the contract. Select a City Clerk Signer from the drop-down and then click **Submit**. If the user selects **Cancel**, the task will not execute and the request will remain in the city clerk queue unchanged.

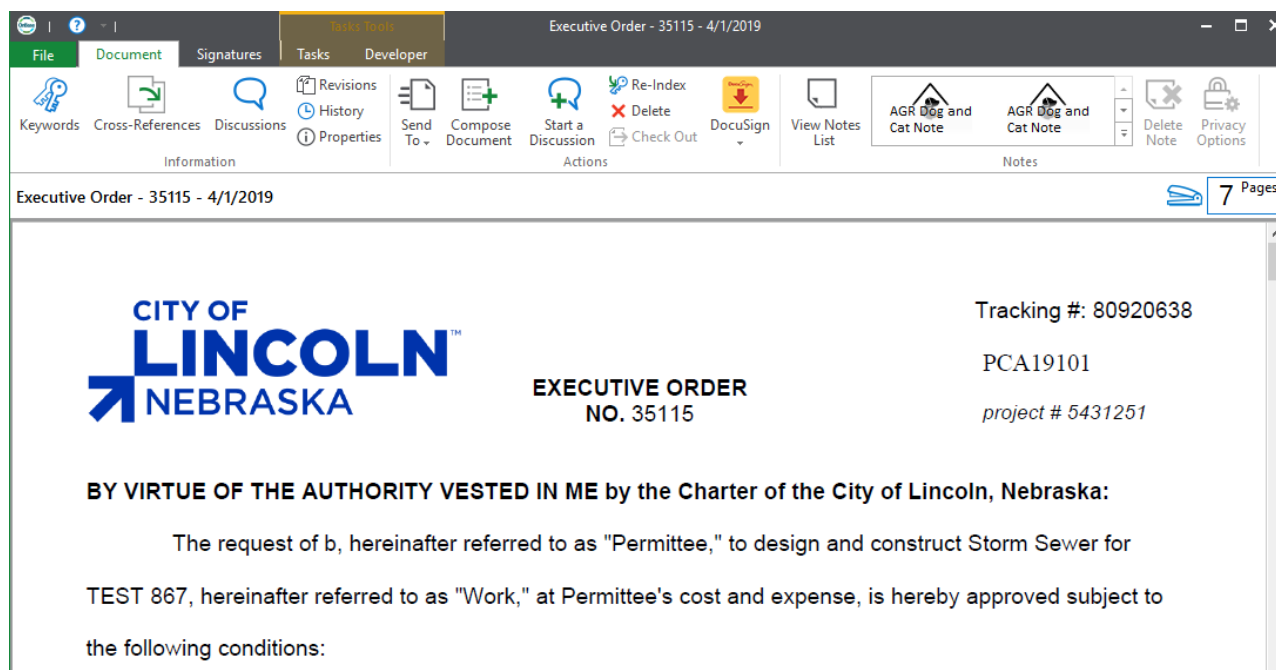
User Interaction

Please select the City Clerk Signature needed to complete the contract.

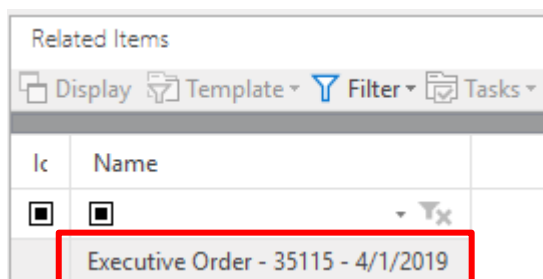
City Clerk Signer
TERESA MEIER

Submit
Cancel

If all requirements are met, the final Executive or Directorial Order will be created. This final Order will merge all supporting documents into one single document and be displayed for the City Clerk to review.



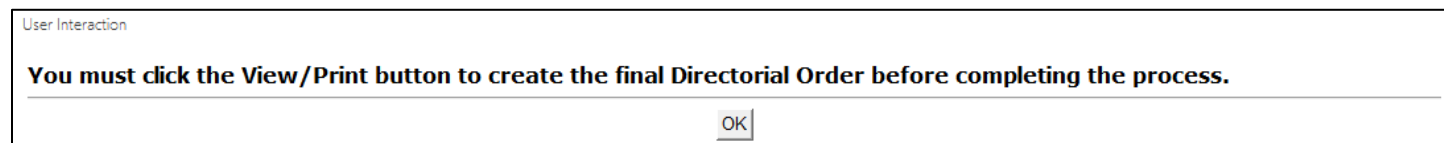
The final Executive or Directorial Order will also be available to view within the Related Items window of workflow.



Ad Hoc: Process Complete



The *Process Complete* task will check to see if an Executive or Directorial Order exists, and display a message if one does not. If this is the case, select **OK** and then click the *View/Print* ad hoc task before continuing.



If an Executive or Directorial Order does exist, the task will finalize the process, set the status to 'Complete', and send the request back to the coordinator for final review in the **COL PCA & PSC Coordination** lifecycle.

Ad Hoc: Send Back to Mayor's Office



Send Back to
Mayor's Office

This task will send the request back to the Mayor's Office queue where they would be able to re-review the request, make necessary updates, and then send the request back to the City Clerk for review.

COL PCA & PSC Coordination

Coordinator

Role: City of Lincoln PSC Coordinator

Active Directory/OnBase User Group: COL EODO Coord-LTU PCA

1. Users defined within the **COL EODO Coord-LTU PCA** group will be notified via email when a new Professional Services Contract has been created and sent to their queue for final processing steps.
2. Select the newly created City of Lincoln - Professional Services Contract from the **Inbox** pane.
3. Select the 'Email Professional Services Contract EO/DO' ad hoc task.



Email Professional Services
Contract EO/DO

4. The Executive Order or Directorial Order will be sent to the following contacts:
 - a. Permittee
 - b. Engineer
 - c. Additional Contacts Listed on Request form