UNIVERSITY OF OREGON

DuckDocs (OnBase) Summer Appointment Request User Guide

The purpose of this document is to describe how to use the Summer Appointment Request (SAR) Form and Workflow in the OnBase web client. The SAR is used to submit summer term faculty appointments, including teaching, research, and other payments for processing in Banner. This guide provides an overview of the features, functionality, and details how to gain access to the form and workflow and how to request help.

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Access to the Summer Appointment Request in DuckDocs

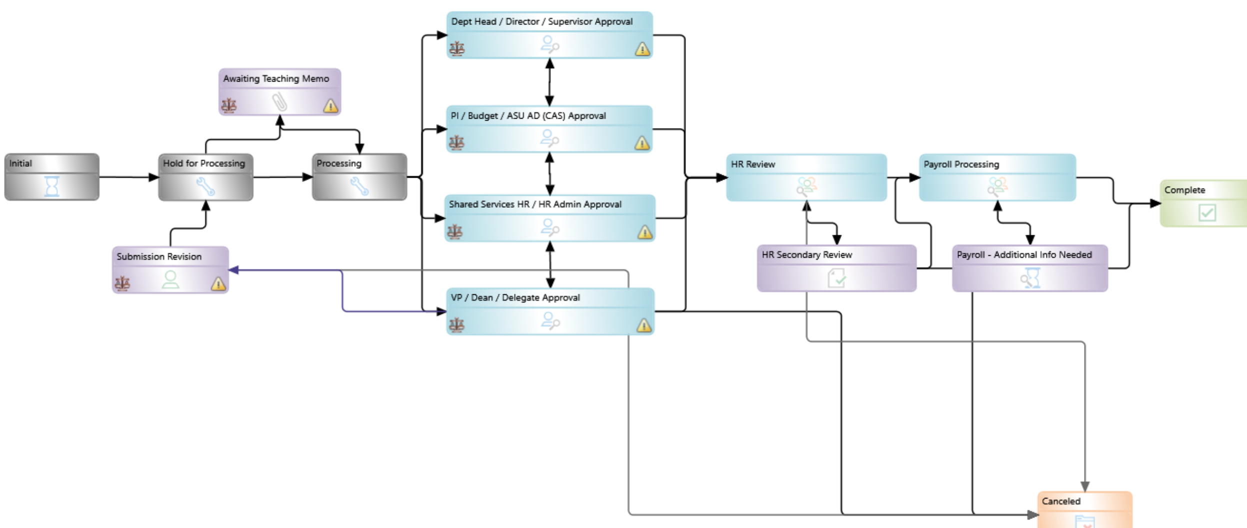
To use the Summer Appointment Request form, you must (1) be connected to an on-campus network or UO VPN and (2) have submission access to the PWIVERI form in Banner. If you do not have access to PWIVERI in Banner, a request can be submitted at Forms.uoregon site here. Please note that training may be required.

Requesting Help

To request technical support for this process, please submit a UO Service Portal ticket here: Summer Appointment Request (SAR) Support. You are encouraged to submit a ticket if you feel you have identified an issue with the application.

Workflow at a Glance

The Summer Appointment Request workflow in DuckDocs (OnBase) contains a number of review queues (4 potential approvers, HR and Payroll) as well as a Submission Revision queue accessible by the form submitter. There are also multiple system and error queues. The primary queues and their purposes are listed below.



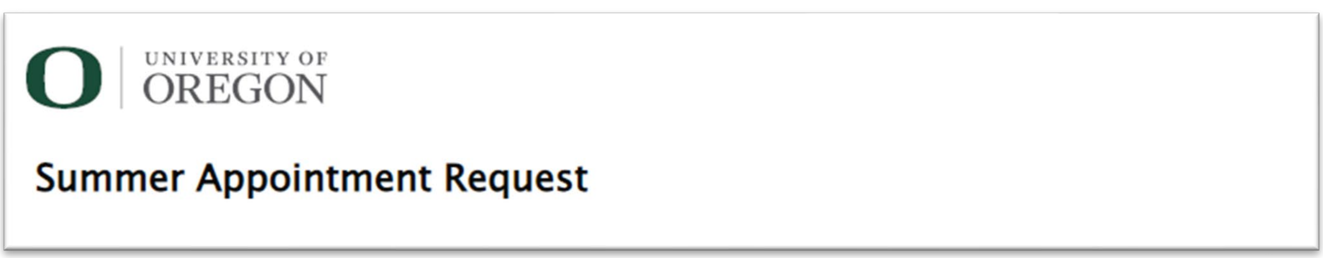
Dept Head/ Director/ Supervisor	Department level review/approval queue; access to cancel, approve, edit labor information, or send form back to submitter.
PI/ Budget/ ASU AD (CAS)	Department level review/approval queue; access to cancel, approve, edit labor information, or send form back to submitter.
Shared Services HR/ HR Admin	Department level review/approval queue; access to cancel, approve, edit appointment and labor information or send form back to submitter.

VP/ Dean/ Delegate	Required for all SAR submissions. Department level review/approval queue; access to cancel or approve to move forward.
Awaiting Teaching Memo	Teaching appointment that has been started but missing a teaching memo will be saved to this queue. Submitters must attach a memo to move the SAR forward. Items will be purged after 90 days of pending in this queue.
Submission Revision	Submitter queue to store requests sent back by reviewers for revision (You will only see items you have submitted).
HR Review	University Human Resources review queue
HR Secondary Review	Secondary University Human Resources review queue, when needed.
Payroll Review	Payroll Initial Review queue
Cancelled	Requests cancelled by submitters or approvers. Items will be purged after 90 days in this queue.
Complete	All approvals have been obtained, and relevant information has been added to Banner. SAR cannot be edited at this stage.

Submitting the Summer Appointment Request Form

Accessing the Form

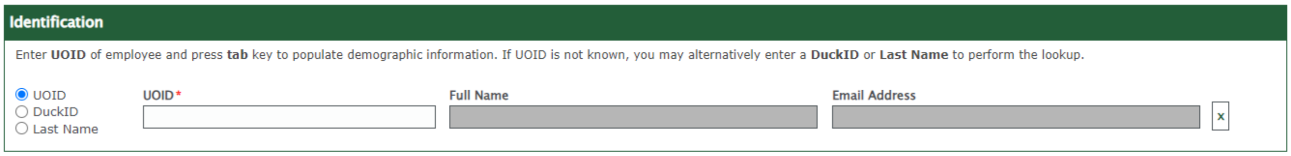
- Navigate to https://duckdocs.uoregon.edu and click **OnBase Web Client**. Login with your Duck ID credentials.
- Click the icon on the top left and choose **New Form**
- Select **Summer Appointment Request** under UO



Completing the Summer Appointment Request Form

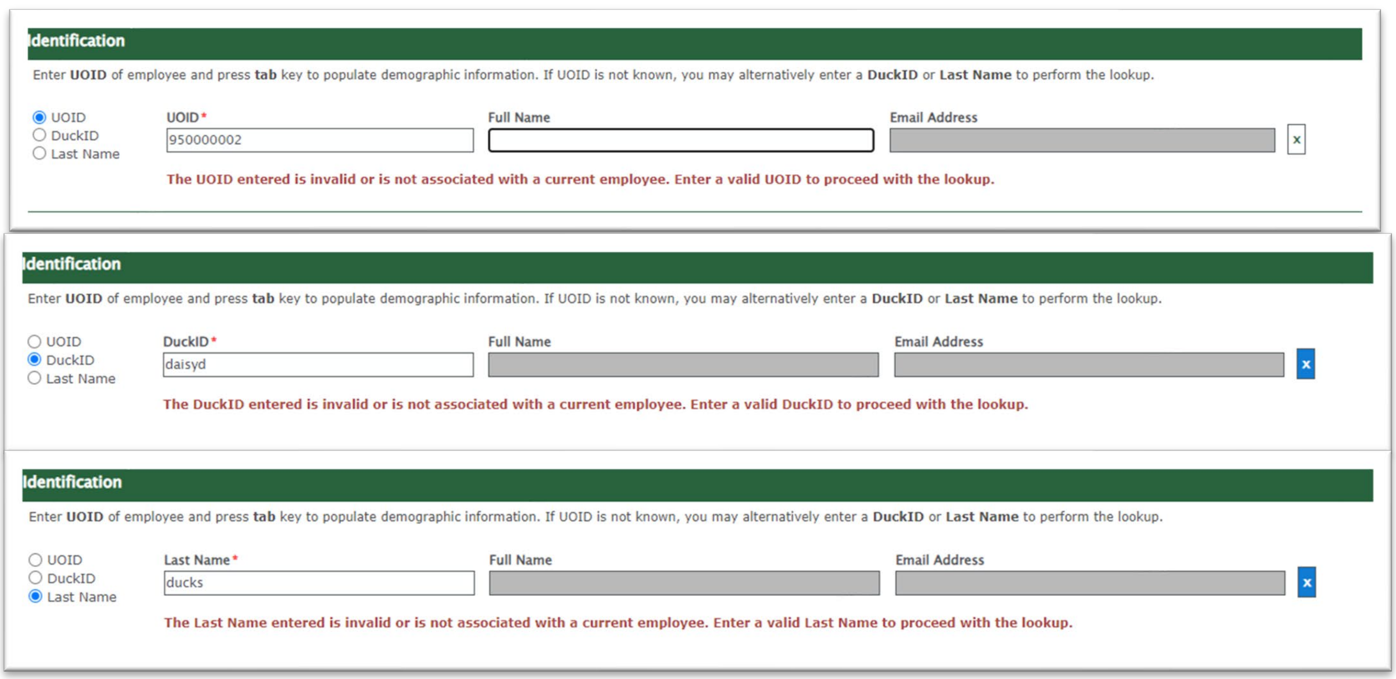
Identification

The SAR has three different ways to find current employees. Submitters may use an employee's UOID #, a Duck ID, or their last name. Last name lookup is not recommended in cases where an employee has a common surname.



Select the bubble to match the information you wish to enter and hit the **Tab** key (or click out of the field) to auto complete the **Full Name** and **Email Address** fields.

- The **Full Name** field is configured to display **Last Name, First Name (Preferred First Name,** if any) (i.e. Smith, Jennifer (Jen) Rebecca).
- To clear information that has been entered, click the x button to the right of the email address field to reset

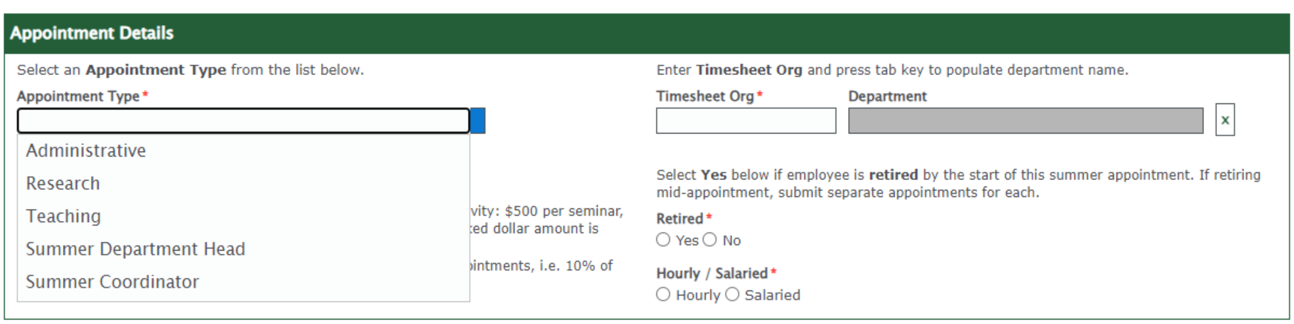


- If invalid information is entered, or if a current employee cannot be found associated with the information provided, a message will appear stating: **The [UOID, DuckID, Last Name] entered is invalid or is not associated with a current employee. Enter a valid [UOID, DuckID, Last Name] to proceed with the lookup.**

Appointment Details

There are several types of summer appointments from which to choose. The type of work being done is the main determination between the different appointment types. Click the dropdown arrow under **Appointment Type** to select an option. Certain appointment types will determine other information. For example, Summer Department Head payments will always be **Fixed Amount** and **Salaried**, so those options will automatically be selected when that determination is made. [Diagram Appointment Type Selection Logic.jpg]

> **Administrative**: This is a broad category that is either fixed amount or FTE based work in service to departments. This includes appointments like course development stipends, faculty supervision, summer camps, advising, and other work that is non-research and non-credit based course work.
>
> **Research**: Typically grant-funded appointments, these appointments are usually based on Full-Time Equivalent (FTE). However, they can also be fixed amounts when the grant's funds are limited.
>
> **Teaching**: For summer, these are credit-based course work similar to course work performed during the regular academic year. These positions are paid at a standard summer rate set by departments and often have a "compressed" Full-Time Equivalent (FTE) due to the shorter duration of summer courses compared to the standard 10-week term.
>
> **Summer Department Head**: Stipend payments for designated faculty who are serving as department heads with summer duties. This does not include department directors. FTE based work should be submitted as Administrative.
>
> **Summer Coordinator:** Stipend payments designed for faculty who are managing and coordinating department programs during the summer term. Individual departments may define this role differently, but work includes summer term scheduling, publicizing course offerings, recruiting and hiring teaching staff,etc.



There are four other required fields in this section. **Payment Type** determines whether or not the appointment is **FTE- based** or a **Fixed Amount**, set payment for the activities. This option will

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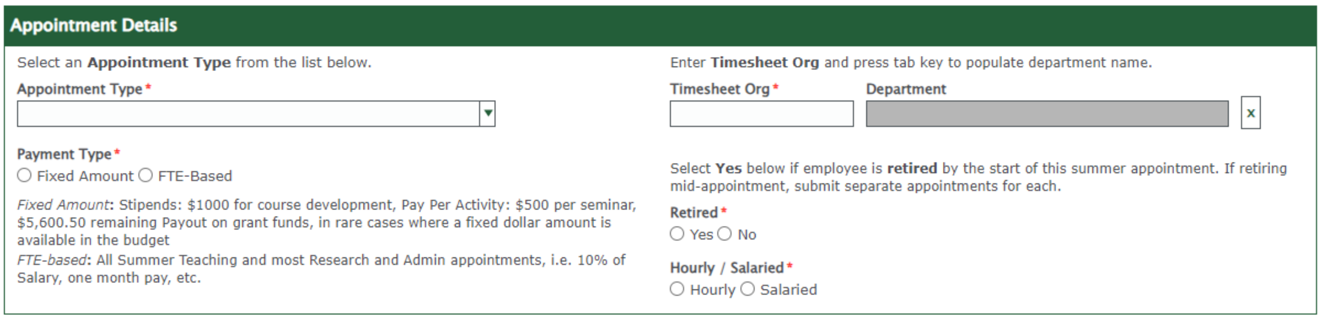
determine the next section of the form. Selecting **Fixed Amount** will lock out the option to submit the appointment as hourly.
Timesheet Org is required to determine where the funds for the position are coming from. Enter the six-digit number and hit **Tab** to auto complete the **Department** field. Law School Timesheet Orgs (those starting with 228) will provide Law School term dates in the standard payroll dates available in the dropdown later in the form.

The final two options are questions. Will the employee be **Retired** during this work? And is this appointment **Hourly** or **Salaried**?



Appointment Details

Select an **Appointment Type** from the list below.

Appointment Type *

Payment Type *

○ Fixed Amount ○ FTE-Based

Fixed Amount: Stipends: $1000 for course development, Pay Per Activity: $500 per seminar, $5,600.50 remaining Payout on grant funds, in rare cases where a fixed dollar amount is available in the budget

FTE-based: All Summer Teaching and most Research and Admin appointments, i.e. 10% of Salary, one month pay, etc.

Enter **Timesheet Org** and press tab key to populate department name.

Timesheet Org * Department x

Select **Yes** below if employee is **retired** by the start of this summer appointment. If retiring mid-appointment, submit separate appointments for each.

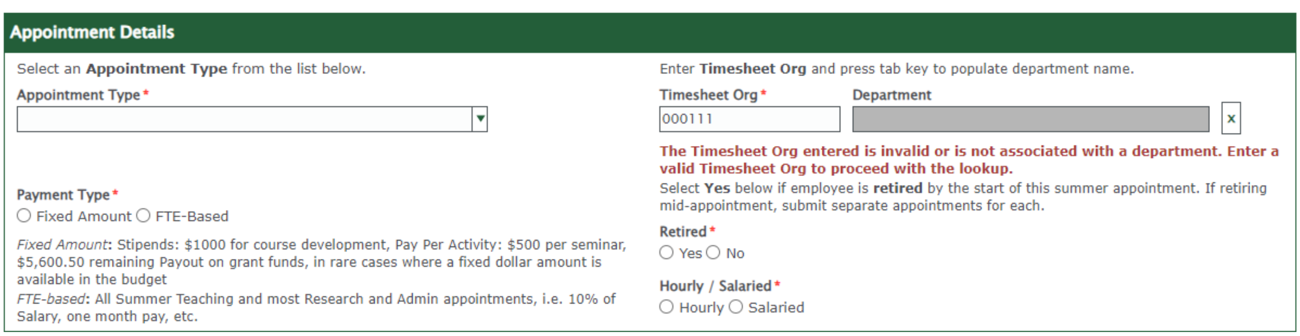
Retired *

○ Yes ○ No

Hourly / Salaried *

○ Hourly ○ Salaried

If an invalid Timesheet org is entered, or if a department cannot be found associated with that number in Banner, a message will appear stating: **The Timesheet Org entered is invalid or is not associated with a department. Enter a valid Timesheet Org to proceed with the lookup.** To remove information entered in the **Timesheet Org** field, click the x to the right of the **Department** field.



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Enter **Timesheet Org** and press tab key to populate department name.

Timesheet Org * Department x

000111

The Timesheet Org entered is invalid or is not associated with a department. Enter a valid Timesheet Org to proceed with the lookup.

Select **Yes** below if employee is **retired** by the start of this summer appointment. If retiring mid-appointment, submit separate appointments for each.

Retired *

○ Yes ○ No

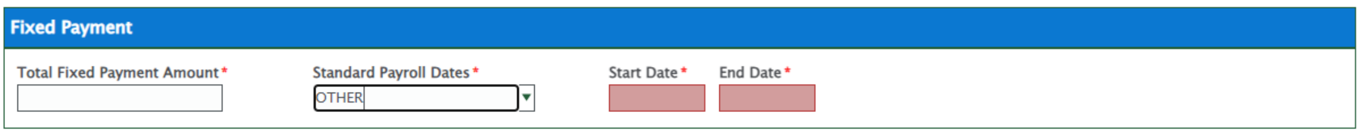
Hourly / Salaried *

○ Hourly ○ Salaried

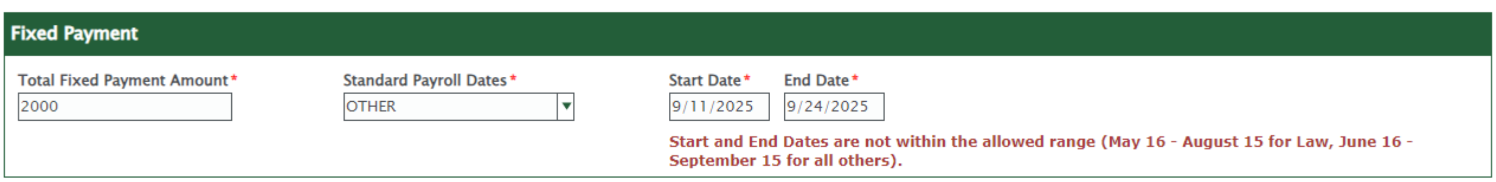
Fixed Amount

If Fixed Amount is selected, the next section heading will match. Enter the total pay in the **Total Fixed Payment Amount** field. Then, select which **Standard Payroll Dates** fit for the payment. The dropdown will provide options based on payrolls monthly paycheck system.

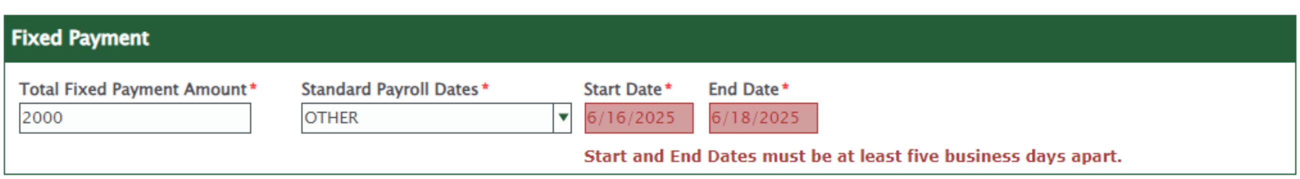
There is an option in the **Standard Payroll Dates** dropdown to select Other, which will allow for the option to insert custom dates.



If OTHER is selected, the dates must be within the allowed summer term range, or an error will appear [Summer term is June 16- September 15 &May 16- August 15 for Law school].
If the dates of the appointment extend outside of these dates, for appointments that must use exact dates like study abroad, contact Human Resources. A separate overload document will need to be submitted for the time that overlaps with the academic year.

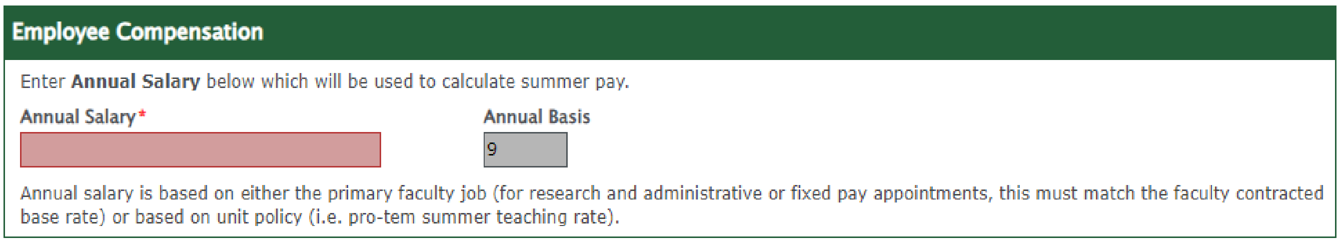


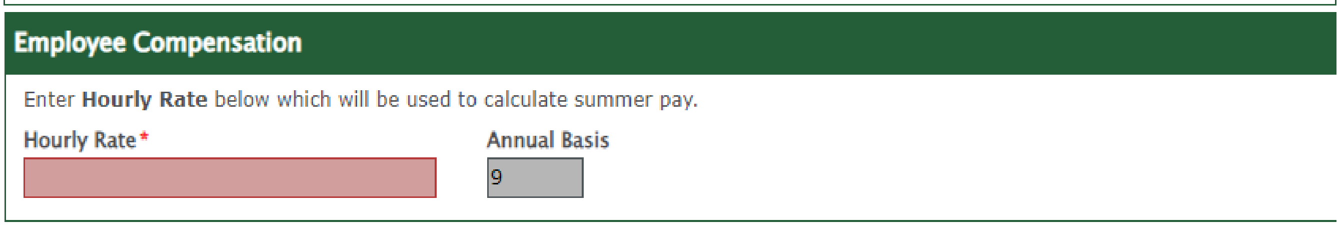
If OTHER is selected, the dates must also be a minimum of 5 business days apart, or the following error message will appear. The Banner HRIS system requires a business week to pay out correctly even if activities are taking place in a shorter time frame.



Employee Compensation

When **FTE Based** is selected, the next section will be **Employee Compensation.** Non-teaching appointments that are FTE based are calculated using the employee's current annual salary or hourly rate depending on the selection made in the previous section (**Hourly**/ **Salaried**). The annual basis for all summer appointments is 9 months. Please use 9-month annual salaries for all summer appointments.



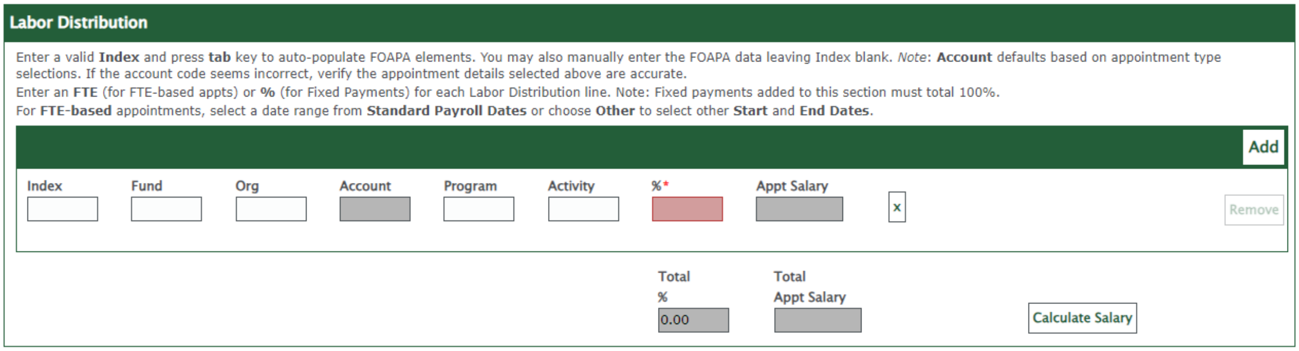


Labor Distribution

The next section is for appointment and budgetary information. This section will appear slightly different based on appointment and payment types previously selected. A summarization of whatever is inserted in the labor distbution section will be available in the next section titled **Salary Output**.

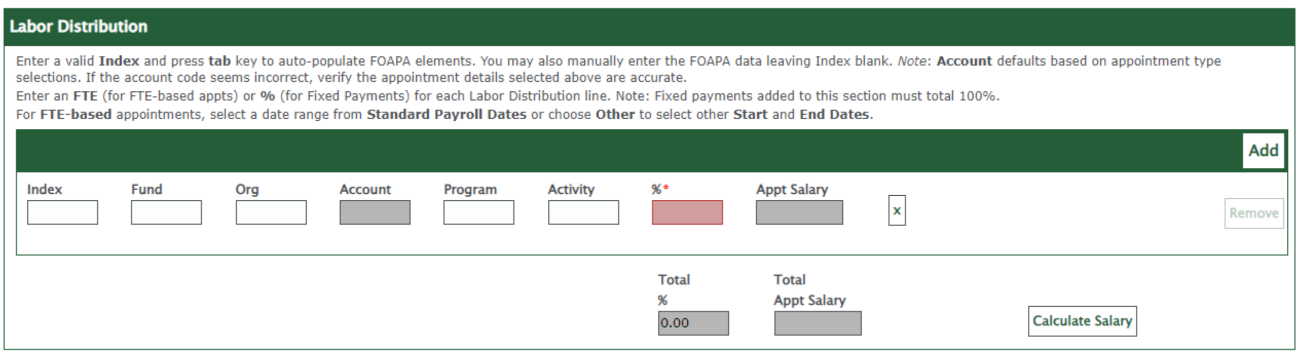
<u>General Information about Labor Distribution Section</u>
Enter a valid Budget **Index** and hit **Tab** button.
The **Fund**, **Org** and **Program** fields will populate based on banner information.
The **Account** field is auto populated based on the appointment type. Enter **Activity** code if necessary.

To clear an index that has been entered, hit the x on the right of the labor information. To complete remove a line, click the **Remove** button.

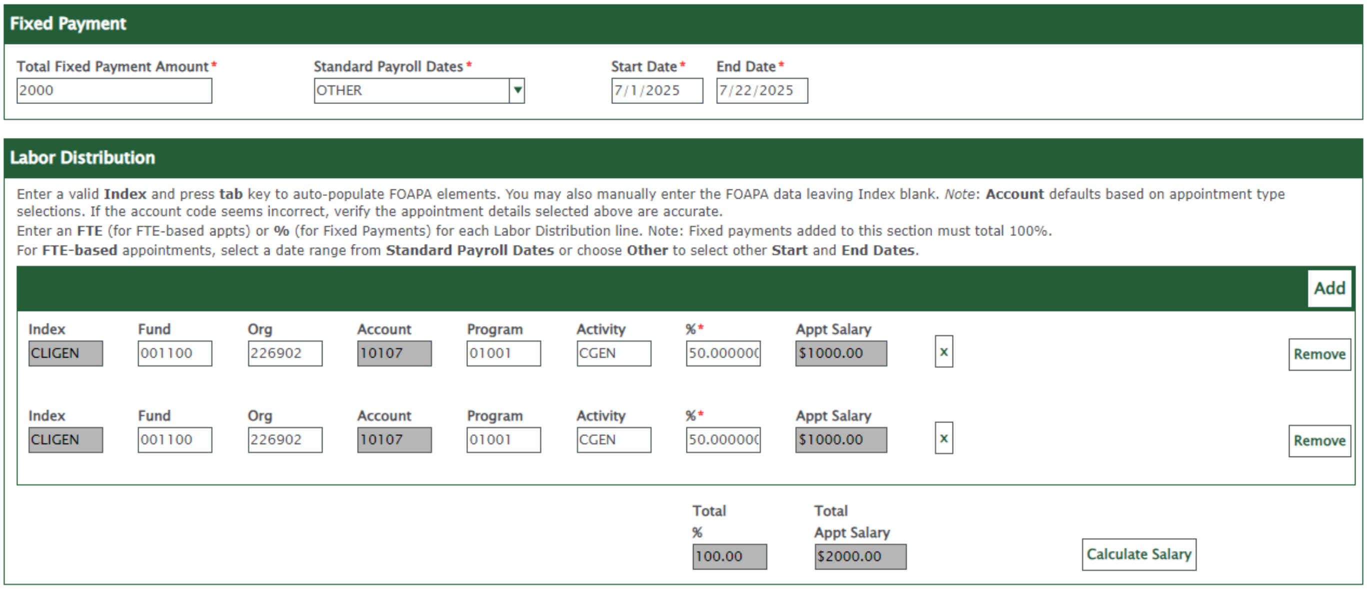


Labor Distribution for Fixed Amount Payments:

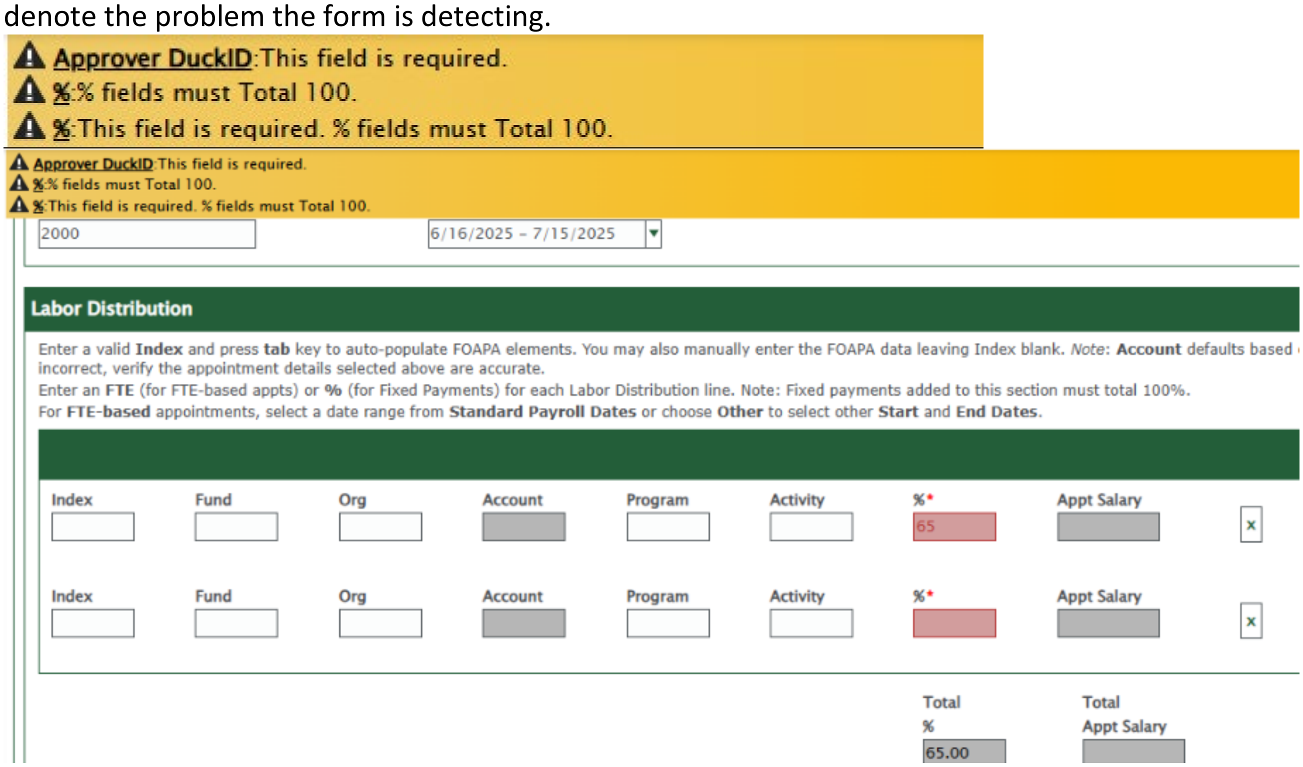
Once the index and activity, if needed, are entered, the form will ask for a percentage. This is the percentage of the payment coming from this particular index. If only one index is being used, the percentage would be 100% since the total amount is coming from one place.



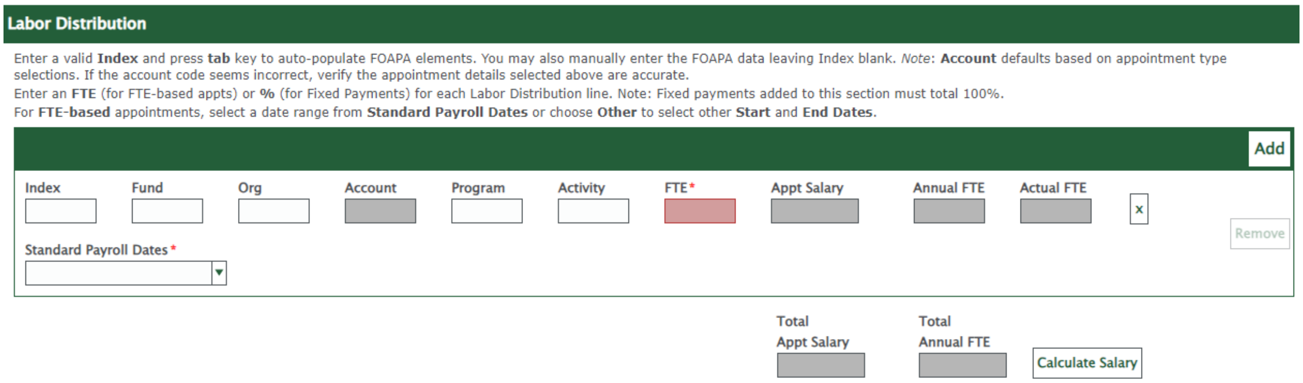
If more than one index is being used, click the **Add** button to add an additional row. Once all the required indexes are added, the total **%** must equal 100%. Clicking **Calculate Salary** will populate the remaining salary fields with the dollar amounts being issued on each index as well as the grand total which should match the **Total Fixed Payment Amount** in the **Fixed Amount** section as shown below. If information is changed, calculated fields will empty, and you must click **Calculate Salary** again to update the information and be sure the most recent change is reflected in the calculations



The form will allow as many indexes as required and will show an error if the percentage total does not equal 100% or if it exceeds 100%.
The error will appear as the % fields going red, and the orange banner at the top of the page will denote the problem the form is detecting.

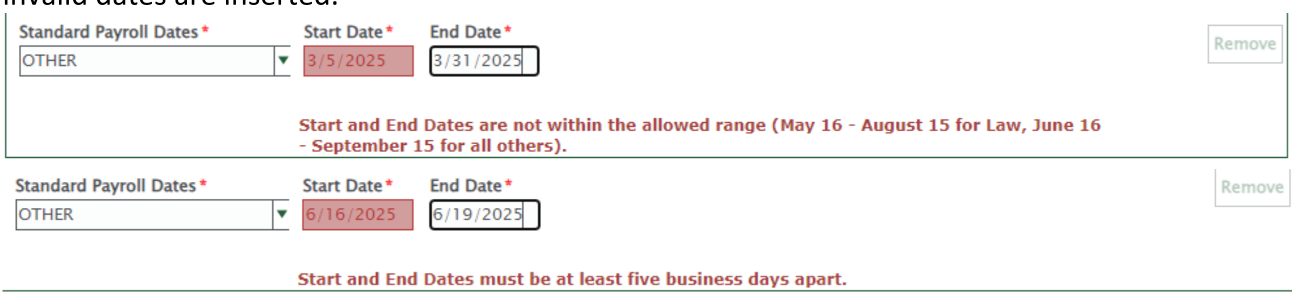


Labor Distribution for FTE-Based Appointments:



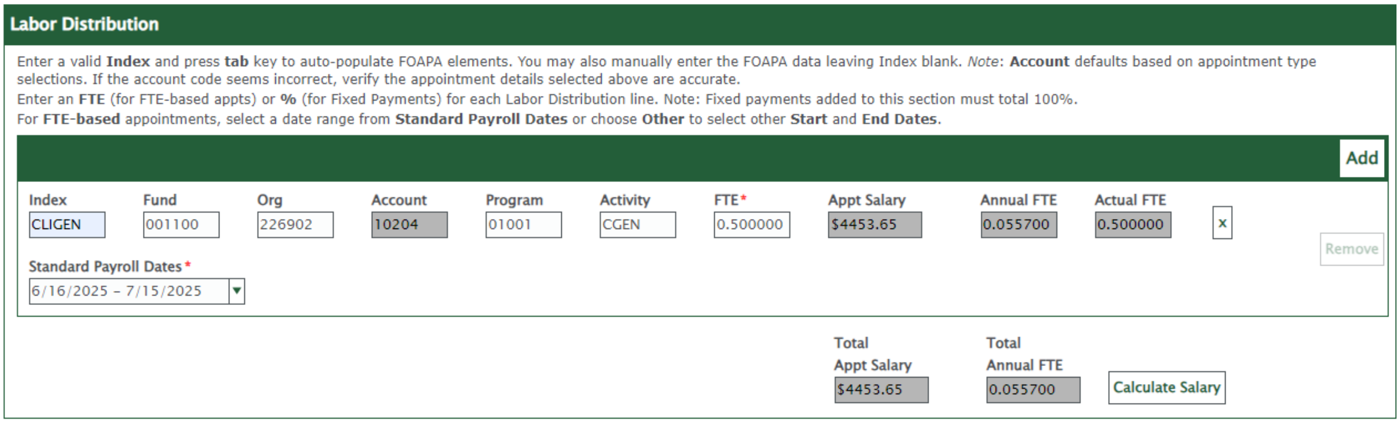
Once the index and activity, if needed, are entered, the form will ask for the **FTE** of the appointment, and the payroll dates the appointment is taking place. The **Standard Payroll Dates** drop down provides a range of standard term dates as well as an option of Other in order to put in customized dates.

If OTHER is selected, the dates must be within the allowed summer term range and must also be a minimum of 5 business days apart, or an error message will appear. Error messages will appear if invalid dates are inserted.

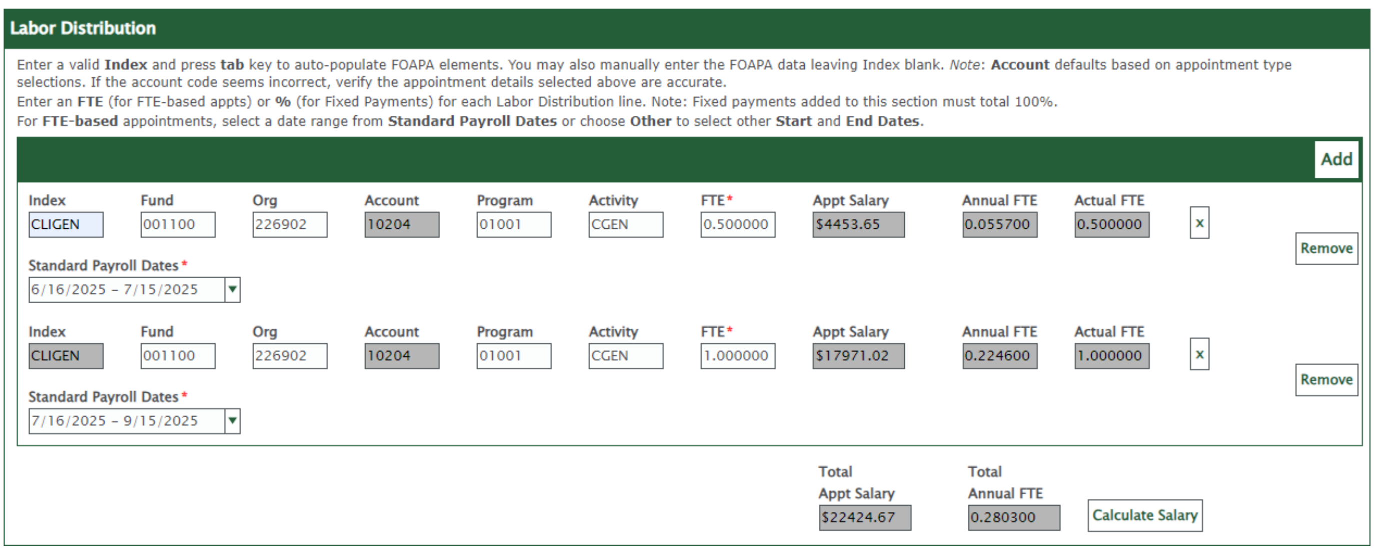


If the appointment is hourly, payroll will still need an estimated FTE for the position. The FTE field will appear as Est FTE for estimated FTE in this section.

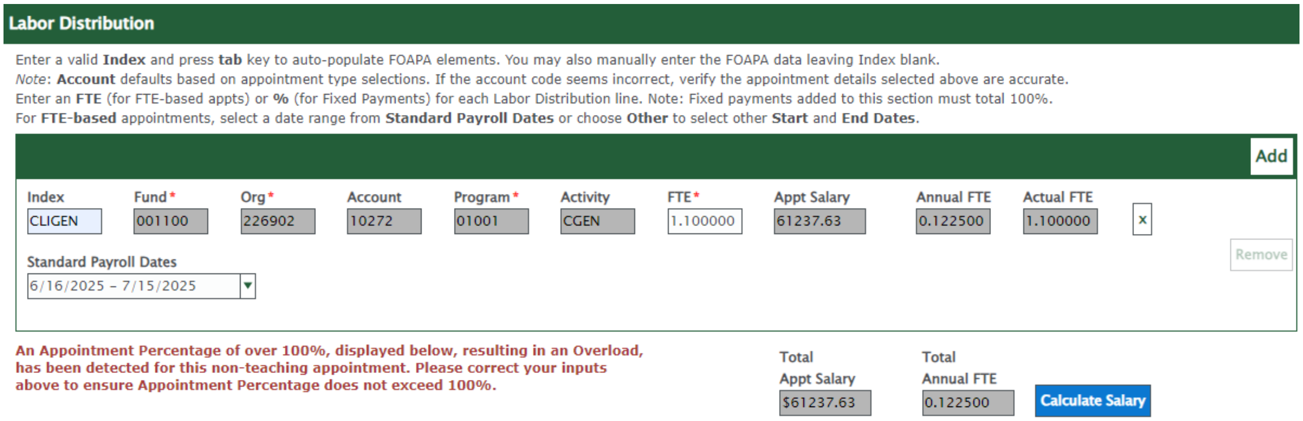
Click **Calculate Salary** to populate the calculated fields based on the **Annual Salary** amount that was inserted in the **Employee Compensation** section.



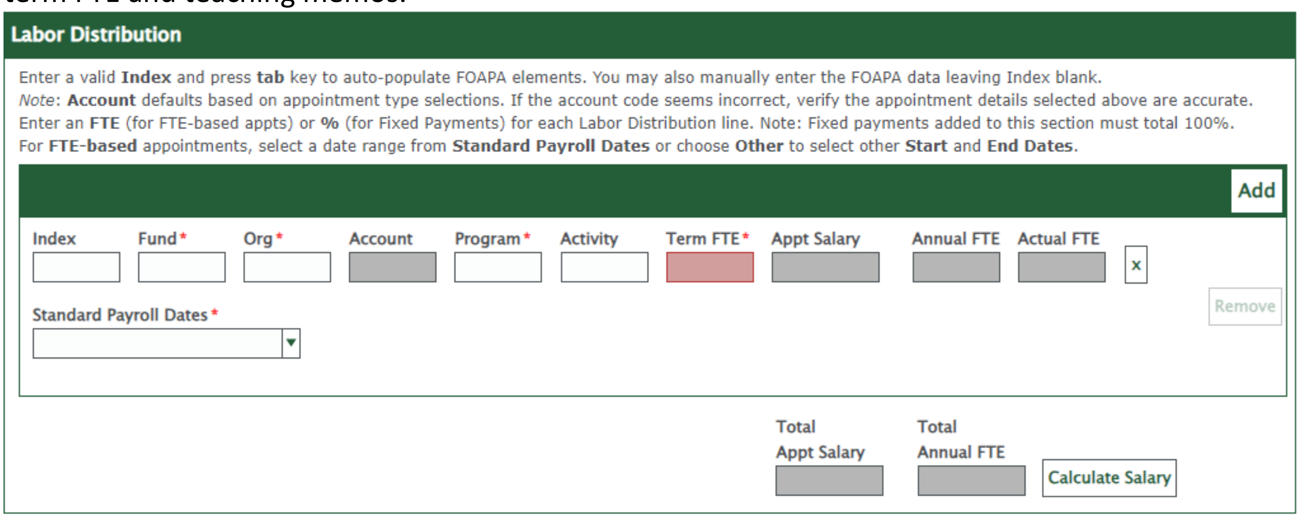
If there are multiple appointments of a similar type, you can click the Add button on the right to add an additional labor index line which will give the opportunity to include different payroll dates if required.



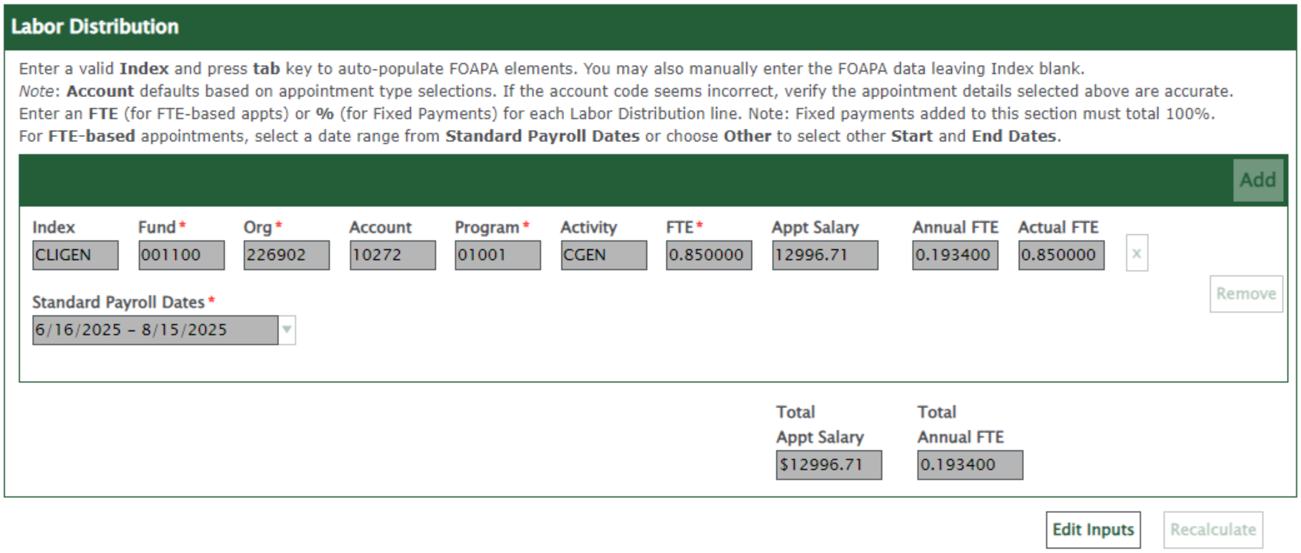
An error will occur if non-teaching, FTE based appointments exceed 1.0. The error will appear after the submitter clicks **Calculate Salary.**



Teaching Appointments will request a **Term FTE** to appropriately compress the Actual FTE based on the payroll dates inserted. The term FTE should be on the teaching memo that was used to notify the faculty member. Refer to the teaching memo section for more detailed information regarding term FTE and teaching memos.



Once **Calculate Salary** is clicked, input fields will be locked, and a new button will be available. If adjustments are needed, submitters or approvers will need to select **Edit Inputs**. See the Edit section for more information.

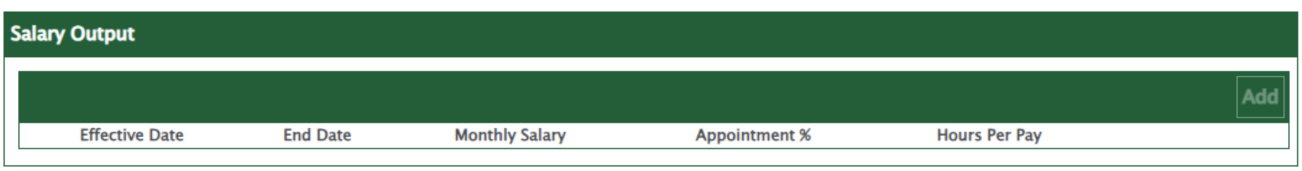


Salary Output

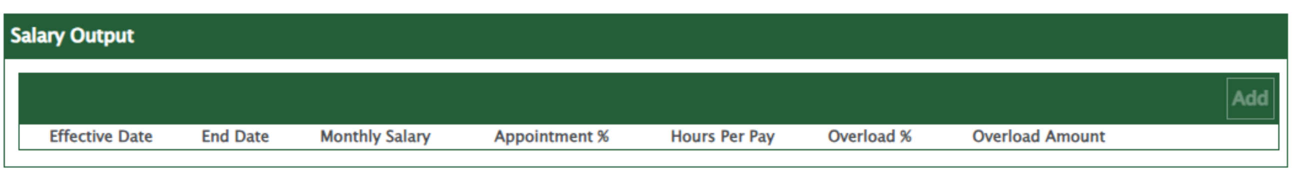
The section titled Salary Output is a summarization of the information provided in the form. This is a way to make sure the information looks correct and will also catch potential overload if appointments go over 1.0 FTE. This is the information that payroll will use to process the appointment.

This information will be entered into Banner. This information will not be editable in this area, and any mistakes should be corrected in the appropriate section earlier in the form.

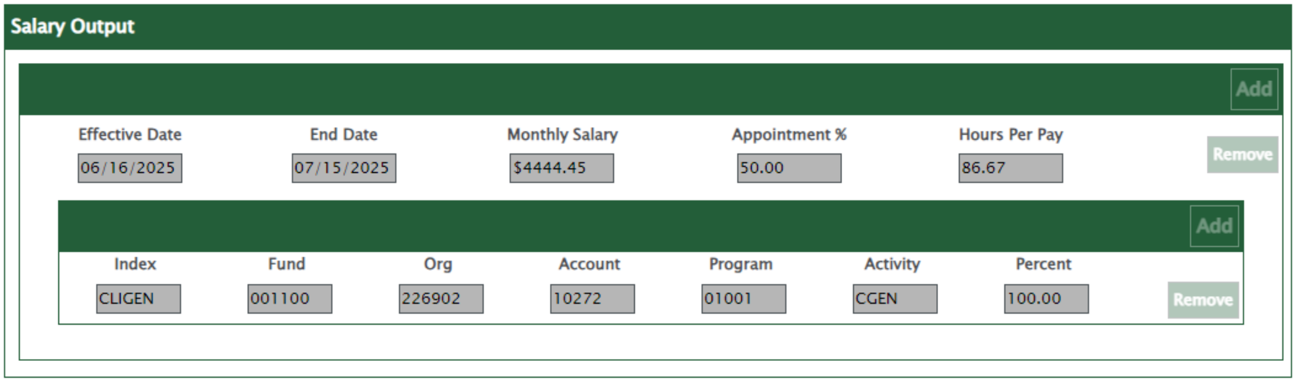
The section will appear blank until the **Calculate Salary** in the Labor Distribution section is clicked.



If a teaching appointment is selected, the section will have additional fields for overload.



Once the form has done its calculations, this section will expand with the information provided. The top section will display the start and end dates of the appointment, the monthly salary based on the FTE and annual salary provided, and the hours based on the FTE provided. <u>This is information that will be entered into the Banner job record.</u>



For FTE based submissions with multiple appointments or fluctuations in payment and FTE, this selection will continue to summarize the information provided in earlier sections.

In the sample below, the appointment is at .50 FTE for the first half of the summer and 1.0 for the second half. There is also a split index in the first half.

It is important to note that the line with the **Effective and End Dates** show the FTE for the appointment as **Appointment %** which is different than the percentage provided in the labor distribution section in the box below that line. The percentage for the labor distribution section will always total 100%.

Salary Output

Add

Effective Date	End Date	Monthly Salary	Appointment %	Hours Per Pay	
06/16/2025	07/15/2025	$4444.44	50.00	86.67	Remove

Add

Index	Fund	Org	Account	Program	Activity	Percent	
CLIGEN	001100	226902	10272	01001	CGEN	50.00	Remove
CLIGEN	001100	226902	10272	01001	CGEN	50.00	Remove

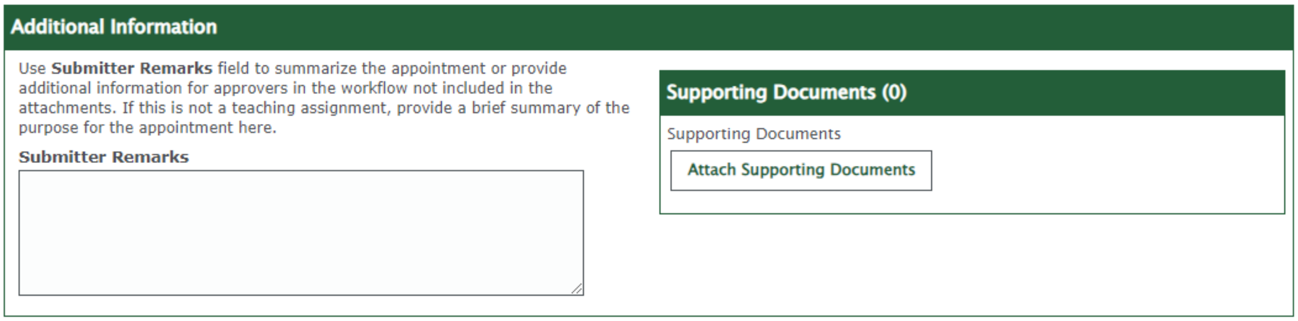
Effective Date	End Date	Monthly Salary	Appointment %	Hours Per Pay	
07/16/2025	09/15/2025	$8888.89	100.00	173.33	Remove

Add

Index	Fund	Org	Account	Program	Activity	Percent	
CLIGEN	001100	226902	10272	01001	CGEN	100.00	Remove

Additional Information

This section provides submitters with a field labelled **Submitter Remarks** to add any comments or remarks about the appointment and a button to attach any required or supplemental documentation. Only submitters will have access to edit this remarks section when the SAR is returned to their Revision queue.


Additional Information

Use **Submitter Remarks** field to summarize the appointment or provide additional information for approvers in the workflow not included in the attachments. If this is not a teaching assignment, provide a brief summary of the purpose for the appointment here.

Submitter Remarks

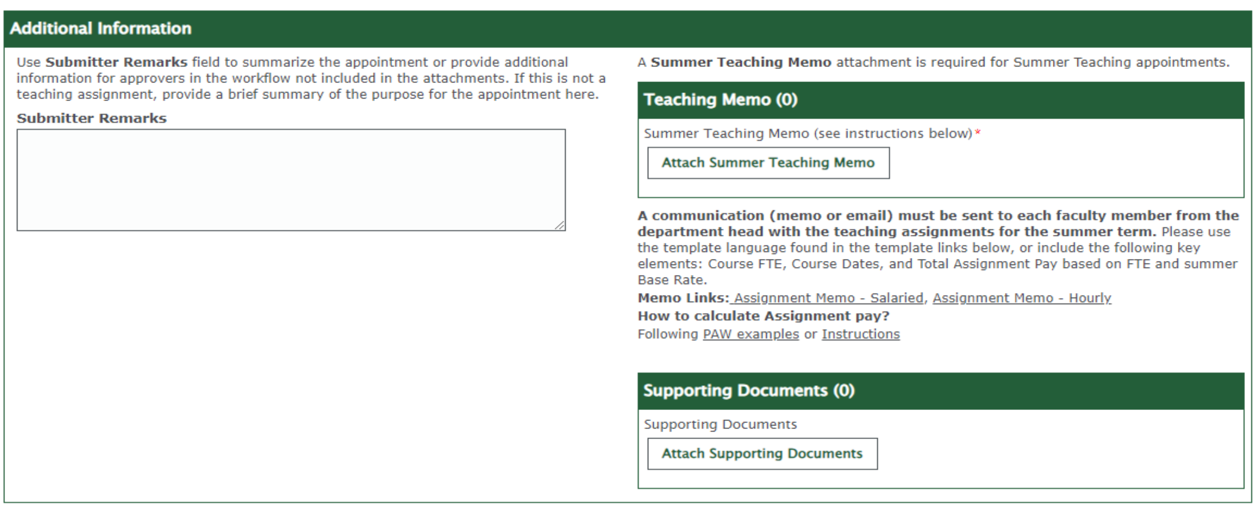
Supporting Documents (0)

Supporting Documents

Attach Supporting Documents

All teaching appointments require a teaching memo. When teaching is selected above, this section will expand slightly with more information regarding the teaching memo, and links to some examples and instructions.

Forms that are saved without a teaching memo attached will be sent to the "Awaiting Teaching Memo" queue and will not be sent forward to approvers until that document is included. See "Teaching Memo- Awaiting Teaching Memo Queue" section for more information.


Additional Information

Use **Submitter Remarks** field to summarize the appointment or provide additional information for approvers in the workflow not included in the attachments. If this is not a teaching assignment, provide a brief summary of the purpose for the appointment here.

Submitter Remarks

A **Summer Teaching Memo** attachment is required for Summer Teaching appointments.

Teaching Memo (0)

Summer Teaching Memo (see instructions below)*

Attach Summer Teaching Memo

A communication (memo or email) must be sent to each faculty member from the department head with the teaching assignments for the summer term. Please use the template language found in the template links below, or include the following key elements: Course FTE, Course Dates, and Total Assignment Pay based on FTE and summer Base Rate.

Memo Links: Assignment Memo - Salaried, Assignment Memo - Hourly

How to calculate Assignment pay?

Following PAW examples or Instructions

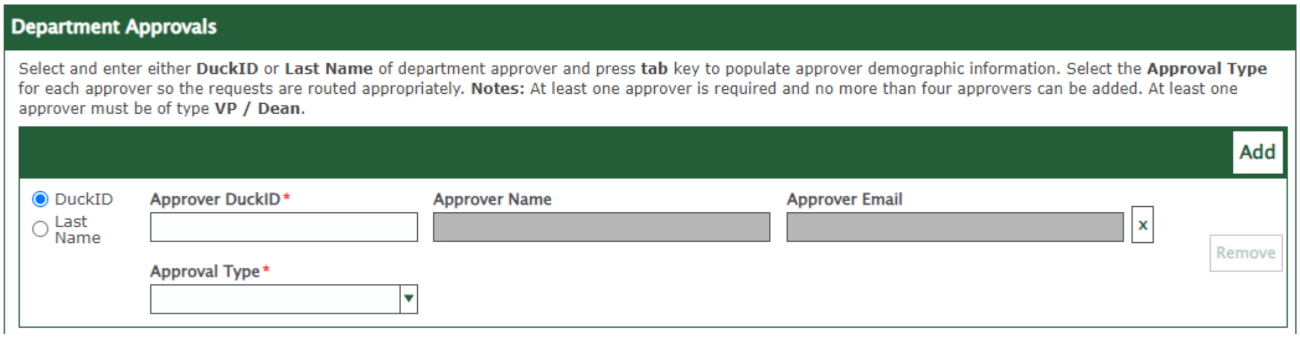
Supporting Documents (0)

Supporting Documents

Attach Supporting Documents

Department Approvals

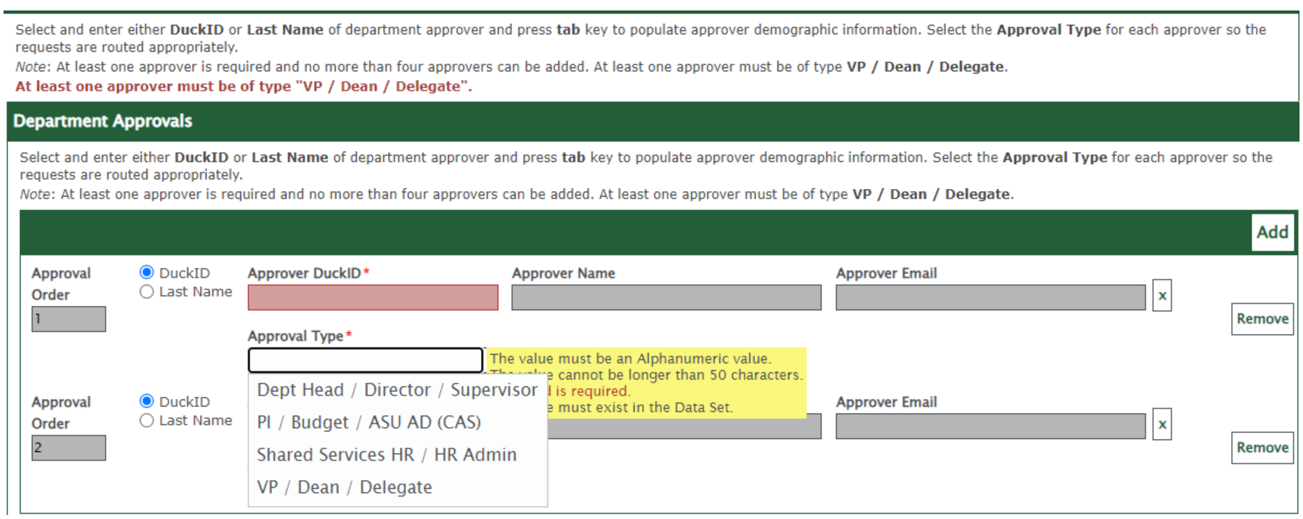
This section allows the submitter to include department level approvals that are required for the appointment. At least one of the approvers must be a VP/Dean for the department and the form allows for up to four approvers by clicking the Add button. If working in multiple areas with multiple appointments taking place at the same timeframe, both departments need to be included in approvers.



Each approver may be added by either the DuckID or Last Name lookup and the approver type must also be selected from the drop down.

When using the Last Name lookup method, if there is more than one current employee with the last name entered, a pop-up window will appear allowing selection of the appropriate individual. (When using the form, emails will appear as actual @uoregon.edu address).

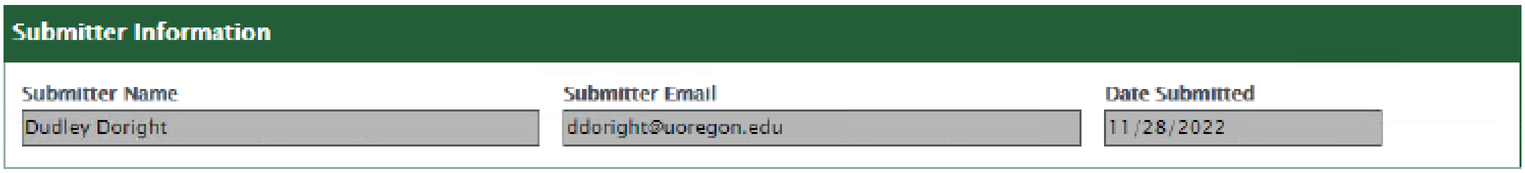
Until a VP/Dean/ Delegate line is added, an error will appear at the top of the section below the help text.



<u>Order matters</u>! The form will be routed to the approvers in the order that they are inserted into the form. An error will appear until VP/Dean/ Delate is selected, and this approver type should always be the final department level approver.

Submitter Information

The **Submitter Name** and **Submitter Email** field are populated automatically depending on who is logged in to DuckDocs and submitting the form. The **Date Submitted** field will capture the date the form was created/submitted.

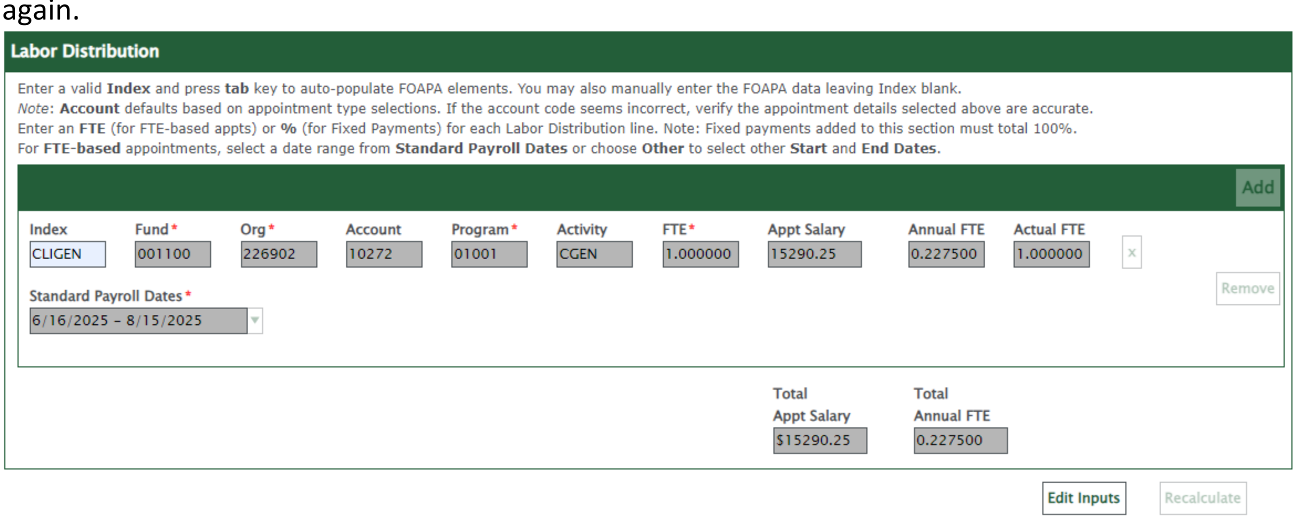


Edit Inputs

This section will cover the Edit Inputs feature for submitters and approvers.

<u>For submitters:</u>

Once **Calculate Salary** has been clicked, editable fields in the SAR will be locked (except for the Department Approvers section). If edits are needed, submitters should click **Edit Inputs**. This will allow submitters to edit any information on the SAR. Calculated fields will clear when new information is provided and **Recalculate** will need to be clicked again to fill the calculated fields again.



Once **Edit Inputs** is selected, the fields will open for changes and the **Recalculate** button will be available.

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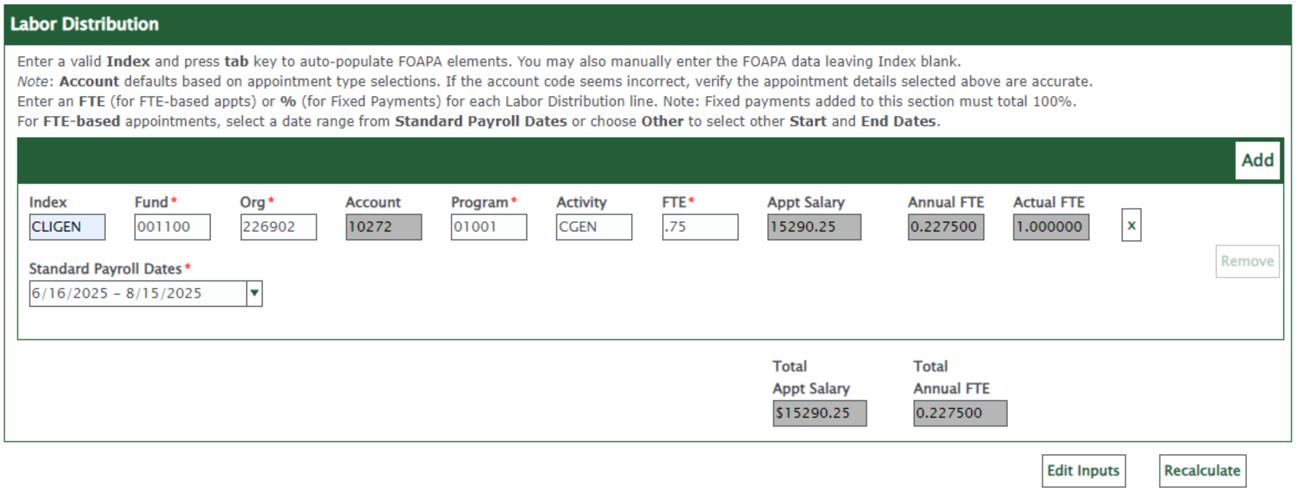

Labor Distribution

Enter a valid **Index** and press **tab** key to auto-populate FOAPA elements. You may also manually enter the FOAPA data leaving Index blank.
Note: **Account** defaults based on appointment type selections. If the account code seems incorrect, verify the appointment details selected above are accurate.
Enter an **FTE** (for FTE-based appts) or **%** (for Fixed Payments) for each Labor Distribution line. Note: Fixed payments added to this section must total 100%.
For **FTE-based** appointments, select a date range from **Standard Payroll Dates** or choose **Other** to select other **Start** and **End Dates**.

Add

Index	Fund*	Org*	Account	Program*	Activity	FTE*	Appt Salary	Annual FTE	Actual FTE
CLIGEN	001100	226902	10272	01001	CGEN	.75	15290.25	0.227500	1.000000

Standard Payroll Dates*
6/16/2025 - 8/15/2025

Remove

Total Appt Salary	Total Annual FTE
$15290.25	0.227500

Edit Inputs Recalculate

If **Recalculate** is not clicked after edits have been made, the following message will appear, and the form will not move forward to the approvers while still in this Edit Mode:

Edit Mode enabled. Please click Recalculate above before Submitting form changes.

Submit

For Approvers:

Certain approver types will have limited access to update and edit the SAR. Once the Edit Inputs button is selected, the Employee Compensation or Fixed Amount, and Labor Distribution section will become editable. Approvers will not be able to edit the Appointment Information section. Those changes will need to be sent back to the submitter to change unless they are the Shared Services HR/HR Admin Approval type who will have access to this section. Please see the Department Approvals section for more information.

Once new information is entered, click **Recalculate** to populate the remaining fields. The SAR will not move forward if the form has not "recalculated" the new information. A similar message to the above will appear when the form is still in Edit Mode.

Edit Mode enabled. Please click Recalculate above before Submitting form changes.

Save

The SAR will need to be saved once recalculated. Scroll to the bottom of the SAR to click **Save**. Approvers will need to select Approved-Route Forward if the form is correct. The other approver options will also be available at this time.

Teaching Memo

This section will define what the teaching memo should include and how to use the SAR to acquire this information.

Teaching memos are documents used to provide faculty members with detailed information regarding their summer teaching appointment. Template memos are available on the HR Operations website here.

All teaching memos should include the following information before being sent to the employee for acceptance: Class Assignment, Course FTE (estimated if hourly), Course Dates, Total Assignment Pay (for salaried). Submitters will need to know the summer Base Rate being used to calculate these appointments.

Submitters can use the SAR to calculate some of this information. To start, the employee information and appointment details should be filled out on the SAR. Once the Employee Compensation section becomes available, submitters need to insert the hourly rate for hourly appointments, and the summer base rate as determined by the department or program. This will typically differ from the employee's regular academic year annual salary.

After the labor distribution index information is inserted, a **Term FTE** is required. This is the FTE that should be listed on the teaching memo as the course FTE. This is the FTE that the course would typically be during a regular academic term. For example, many standard courses tend to be .30 to .33 FTE per term during the regular year.
The next required field is the payroll dates. Select dates that coincide with the course work. Standard selections are available, but custom dates are also available when OTHER is selected. Click **Calculate Salary** to populate the calculated fields.

Once calculated, submitters can refer to the SAR to see the calculated total pay based on the information provided. This information can be used to finalize the teaching memo to send out to the employee.
[insert screen shot with labelled arrows.]

If the teaching memo has not been accepted by the employee, it should not be attached to the SAR at this time. Once fields are calculated, and approvers are included, scroll to the bottom of the form and click **Save**. This will move the teaching SAR to a new queue without starting the approver process. This queue is labelled Awaiting Teaching Memo.

Awaiting Teaching Memo Queue

This section will detail information about the Awaiting Teaching Memo Queue.

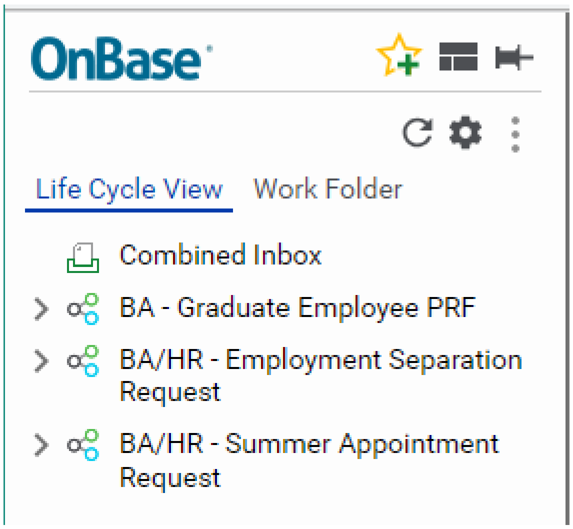
As mentioned above, teaching SARs that are saved without a memo are sent to the Awaiting Teaching Memo queue. Submitters will receive an email notification when a SAR has been moved to this queue. The email will have the following subject line:
SAR Teaching Memo Needed for Last Name, First Name (UO ID)

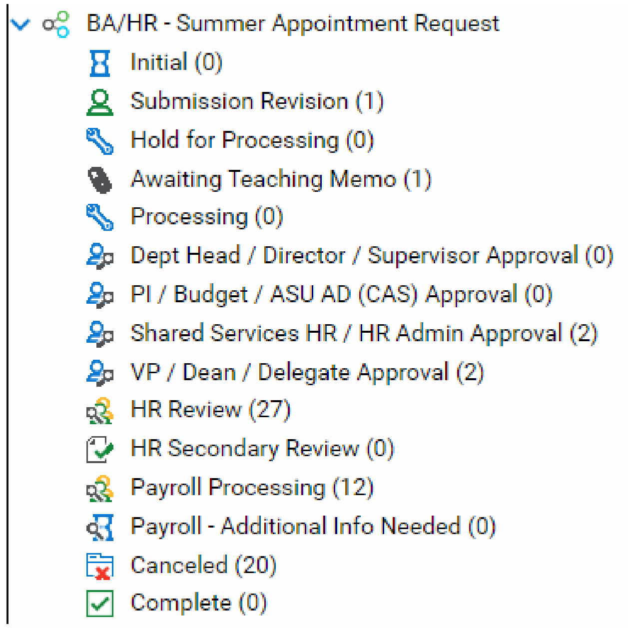
The body of the email will contain the following information:

> The Summer Appointment Request (SAR) submitted in DuckDocs for **Last, First Name (UO ID), Effective Date: [earliest date provided],** is awaiting a Teaching Memo attachment. **This is required to continue processing the request.**
>
> Please click the link below to access your submission. Instructions for adding the teaching memo are as follows:
> 1. Add the memo as a **Teaching Memo** attachment to the request form and make any necessary changes.
> 2. Click **Save** to save the attachment and any changes.
> 3. Click **Submit for Approval** to submit or **Cancel** to cancel the submission
>
> Link to SAR provided here
>
> This is a system-generated message. Please do not reply.

Submitters will be able to access the form through the link provided in the email or through the workflow.

To access the workflow in DuckDocs, click the Main Menu button then click **Open Workflow** to open a new window. In the new window, click the arrow next to **BA/HR - Summer Appointment Request** to expand the available queues.

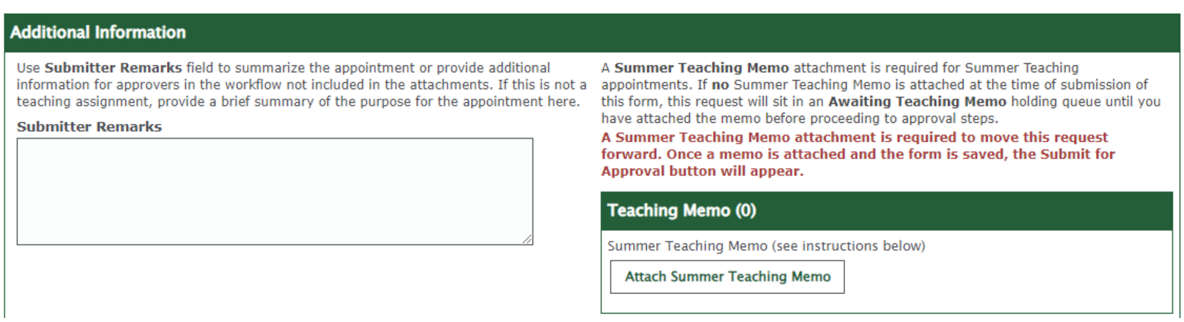




Once the workflow is open, click the queue you were looking for to see the forms that are pending there.

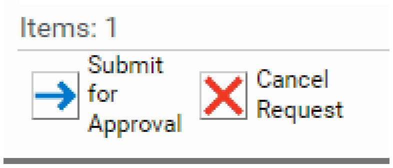
Submitters will have access to edit the form in this stage if needed. If changes are made to the appointment information or labor distribution, submitters will need to enter edit mode via the **Edit Inputs** button and then click **Recalculate** in order to update the calculated fields. See the Edit Inputs section for more information about the edit feature.

An error message will occur once a form is in the "Awaiting Teaching Memo" queue. The teaching memo becomes a required field once the SAR has moved to this queue.



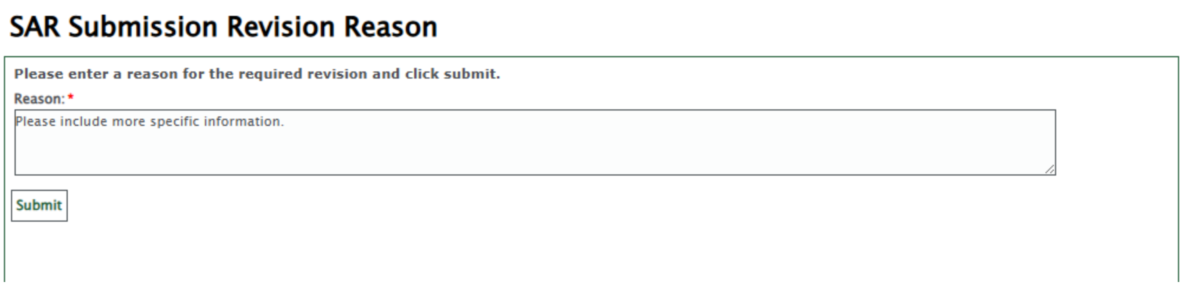
<u>Items in the queue will be purged 90 days after entering this queue.</u>

Once a memo is attached, and all information is correct, scroll to the bottom of the form and click **Save**. This will save the attachment to the form and give the submitter a new option to Submit for Approval.



Teaching Appointment Approvers

Approvers will have the ability to edit certain fields of the SAR. In cases where adjustments are made to total pay or FTE of the appointment that result in a difference between the provided teaching memo and the information inserted in the SAR, the approver must send the form back to the submitter. Approvers will need to provide details of the update in the **Revision Reason** box.

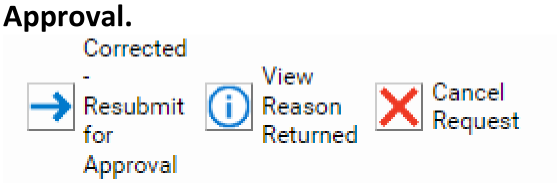


These forms will be sent to the **Submission Revision** queue when sent back from approvers and will not reenter the **Awaiting Teaching Memo** queue unless the teaching memo is removed and the form saved. The SAR will not progress for reapproval without a teaching memo attached.

The submitter will need to provide a new teaching memo if the changes made are correct. Employees should be notified of these changes if it affects their total pay.

Like other Revisions, the SAR will be routed back through all approvers on the list once the revision is corrected, saved, and moved forward for review.

Saving the form will not move the SAR forward. Submitter must click **Corrected - Resubmit for Approval.**



Department Approvals

This section will discuss the department approvals and what approvers should anticipate receiving.

[insert here] who is the appropriate approver for each type. (move from below)
Order of approvers matter- which order is preferred.

Different approver types can edit certain information before moving the SAR forward to the next approver instead of returning the SAR to the submitter (See the **Edit Inputs** section for more information about how to use the edit feature).

Dept Head/ Director/ Supervisor PI/Budget/ASU AD (CAS)	Can edit Employee Compensation (for FTE based), Fixed Amount, Standard Payroll Dates, and Labor Distribution information.
Shared Services HR/ HR Admin	Can edit Appointment Details section, Employee Compensation (for FTE based), Fixed Amount, Standard Payroll Dates, and Labor Distribution information.
VP/ Dean/ Delegate	Unable to edit SAR; must return to submitter if adjustments needed or cancel the submission.

Because of these different editing abilities, submitters should consider who has access to edit the form as well as what order would be best for your department's needs.

Not all submitter types are required, so don't feel obligated to include all 4 signatures if your department does not have all 4 types. Types can also be repeated, if needed. Submitters do not need to include themselves as an approver. Work with your leadership or shared service to know who to assign as approvers based on your departmental policies.

Below is a sample of how the approver types can be used for this approval process. The descriptions provided are only examples of how these approver types are typically used. Refer to your leadership or shared service since the definitions for these approver types may differ from what is provided here based on departmental needs.

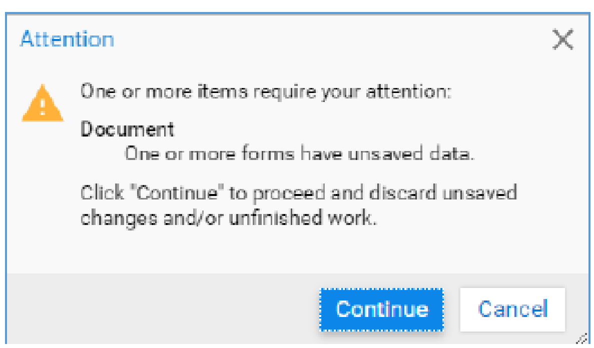
Dept Head/ Director/ Supervisor	Should verify that this individual is meant to have an appointment, or they are the correct person to receive the payment.
PI/Budget/ASU AD (CAS)	Should verify budget information provided on the form. This includes the correct labor indexes and salary amounts.

Shared Services HR/ HR Admin	Should verify that the correct appointment type and payment method were chosen for the work being done.
VP/ Dean/ Delegate	This is the only required approver. This approver is the final review before the form is sent to HR and Payroll for processing.

In DuckDocs, Approvers should review the form for correct information. Remember that the section titled **Salary Outputs** is the summary of the appointment and budget information that was inserted in the form.
Approvers will have the following options once the form has been reviewed:

Approved-Route Forward: this confirms the form looks correct and will move the form forward to the next approver queue.
Cancel Request: canceling a request will remove it from the approvers queue and the form will not move forward and will not be processed.
Return to Submitter: If an error is detected, additional information is required, or if you received the form in error and should not approve it, you can click return to submitter to send the form back to the start of its process. Clicking this option will open a text box in order to leave a note to the submitter with the reasoning behind the return.

If changes are not needed, do not save the form. Click out and you will receive the following message:



Click **Continue** to move forward without saving any changes. If changes do need to be saved, click **Cancel** and go back and save the form before moving forward.

The first approver specified on the form will be sent an email within a few minutes from DuckDocs (duckdocs@uoregon.edu) with the following subject:

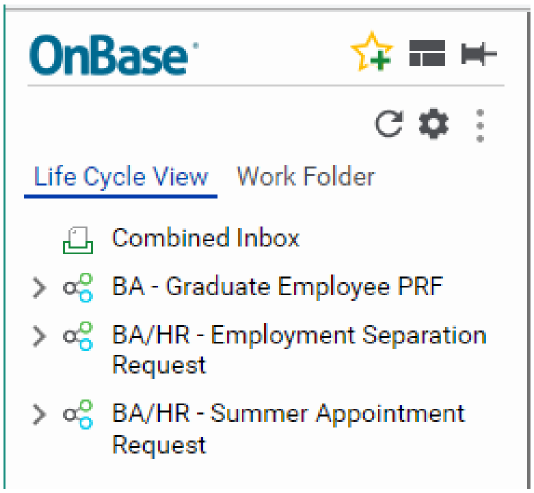
SAR Approval Needed for Last Name, First Name (UOID)

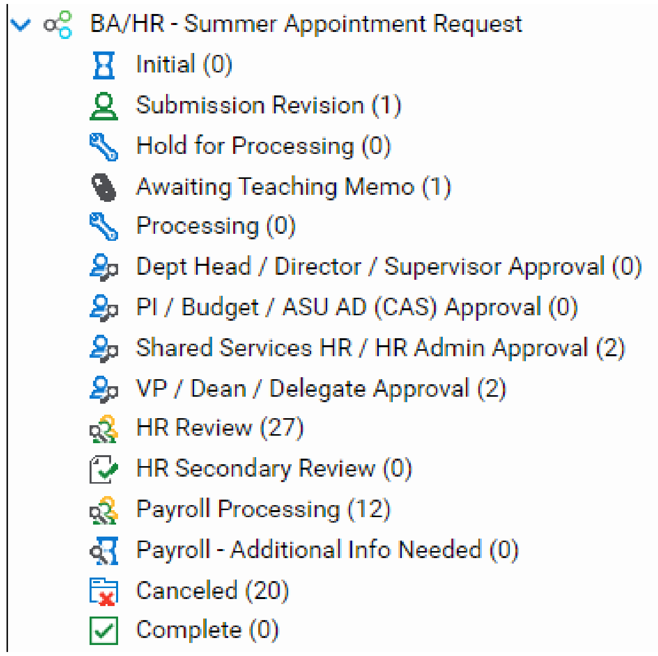
The body of the email will include information based on the selections made:

> The Summer Appointment Request (SAR) submitted in DuckDocs for **[Appointment Type]** on behalf of **Last, First Name (UOID)** is ready for your review. Click the link below and choose either **Approved - Route Forward** or **Return to Submitter**. If you choose to return the request, you will be prompted to enter a reason, which will be sent to the submitter.
>
> *Please Note:* Accessing the link below requires a secure on-campus network connection, or VPN, if remote.
>
> Link provided here
>
> This is a system-generated message. Please do not reply. If you have questions about this request, please contact the submitter at **[submitter's uoregon.edu email]**.

A link to the document will be included in the email message. Click the link to be taken to the submission directly in DuckDocs.

To access the workflow in DuckDocs, click the Main Menu button then click "Open Workflow" to open a new window. In the new window, click the arrow next to BA/HR- Summer Appointment Request.





Once the workflow is open, click the queue you were looking for to see the forms that are pending there. Approvers will only see items that are pending their review. The number in parentheses will indicate items waiting approval.

Submission Revision

This section will cover options submitters have when a form is sent back to them for revision.

If an item is sent back to the submitter for revision, the submitter will receive an email from DuckDocs (duckdocs@uoregon.edu) with the following subject.

SAR Revision Needed for Last Name, First Name (UOID)

The body of the email will include information based on the selections made:

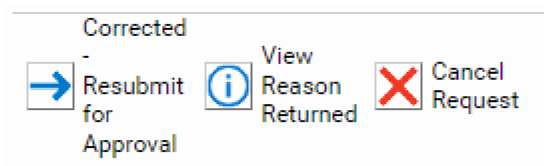
> The Summer Appointment Request (SAR) submitted in DuckDocs for **Last, First Name (UO ID)** has been returned to you for the following reason:
>
> **[text provided by the individual who returned the submission. Generally, this is a brief explanation of what adjustment needs to take place]**
>
> Please click the link below to access your submission, make necessary corrections, and click **Corrected - Resubmit for Approval** to resubmit or **Cancel** to cancel this submission.

Link provided here

This is a system-generated message. Please do not reply.

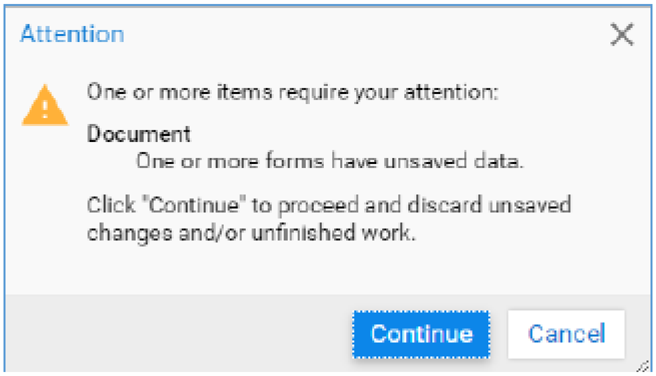
A link to the document will be included in the message. Submitters should click the link to view the request in DuckDocs and view the reason it was sent back (this can be viewed in the email or by clicking **View Reason Returned** in DuckDocs).

A couple of options are available when a form is returned.
Corrected- Resubmit for Approval: this confirms the form looks correct after any edits were made and will move the form forward to the first approver listed. The form will be rerouted to each approver again.
Cancel Request: canceling a request will remove it from the queue and the form will not move forward and will not be processed. A text box will be provided to include a reason before you cancel. This action cannot be undone.



If changes are needed, click the **Edit Inputs** button to unlock the fields available for edit. Once the new information is inserted, click the **Recalculate** button to populate the calculated fields. Scroll to the bottom of the form and click **Save.** More information is available under the Edit Inputs section. Submitters can also change, add or remove approvers at this stage. The VP/ Dean/ Delegate approver line will always be a requirement and should be the final submitter in the list. See the **Department Approvals** entry of the Submitting the Summer Appointment Request Form section for more information.

If everything looks correct, scroll to the bottom of the page and click **Save**.



If presented with the following message, it means that changes were made to the form, but the form was not saved. Click **Cancel** to return to the form and scroll down and click **Save**. To navigate away without saving changes, click **Continue**.

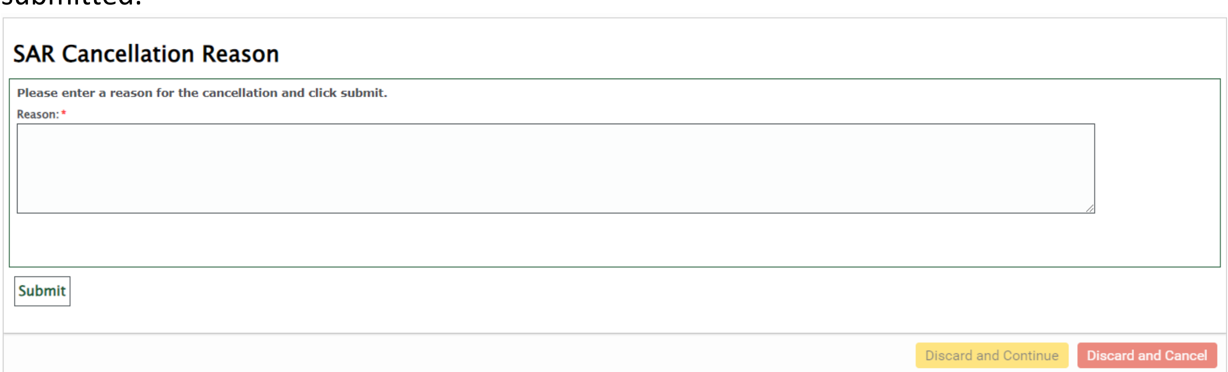
Once saved, click **Corrected- Resubmit for Approval** or **Cancel Request.**
When sent back, the form will be returned to the submitter for edits and then continue through all the approvers again. The submitter will be able to adjust the approvers during this time if needed.

Cancellations

This section will cover how to cancel SARs and how these forms are managed.

SARs are able to be cancelled once they have been submitted. Submitters can delete a SAR from out of the Submission Revision queue. All approver types can also cancel the form during the approval process by clicking **Cancel Request**.

Once selected, a section will open requesting a reason for the cancellation. Record the reason the form is being cancelled and removed from the approval process. Click **Submit** to finalize cancellation. Forms that are cancelled cannot be "uncancelled" and a new SAR will need to be submitted.



If Cancel Request is mistakenly clicked, click discard and continue to remain on the SAR, or Discard and Cancel to close out of that request.

Once a form is cancelled, **only** the submitter will receive the following email:
Subject: SAR Cancellation for Last Name, First Name (UO ID)

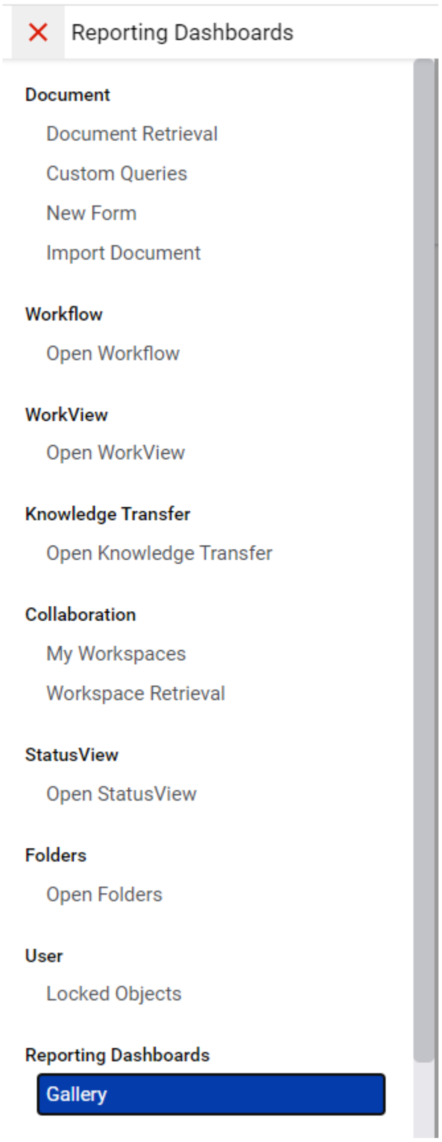
> The Summer Appointment Request (SAR) submitted in DuckDocs for **[appointment type]** on behalf of Last Name, First Name **(UO ID), Effective Date: [earliest date listed on SAR],** has been cancelled. Click on the "Cancellation Reason" ad hoc action for more information, if needed.
>
> Link to form provided here.
>
> This is a system-generated message. Please do not reply. If you have questions about this request, please contact the person who cancelled the request at [uo email of canceller]

Once a form is cancelled, it is viewable in the Cancelled queue, along with the cancellation reason, for 90 days before the record will be purged.

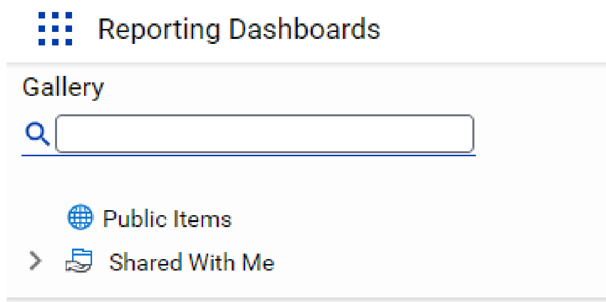
Running SAR Reports

This section covers how to pull reports and look up submissions in DuckDocs regarding SAR submissions.

In DuckDocs, click the Main Menu button then Gallery under Reporting Dashboards to access reports created for you.



Click the arrow next to **Shared with Me** to expand the list, then click a report to view the report to view submitted and/or Approval Items in workflow. [need screenshot from submitter perspective, I have all SAR reports.]



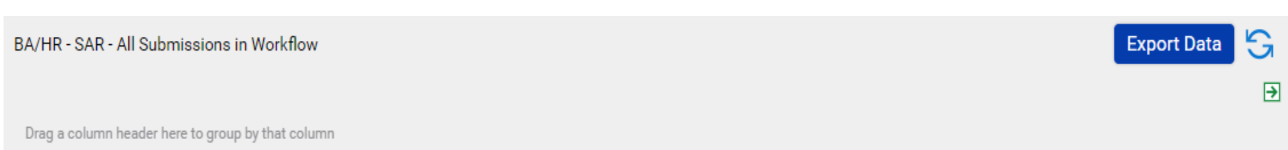
There will be a few reports available to submitters and those with access.

BA/HR- SAR- All Submissions in Workflow- good report for viewing status of submissions

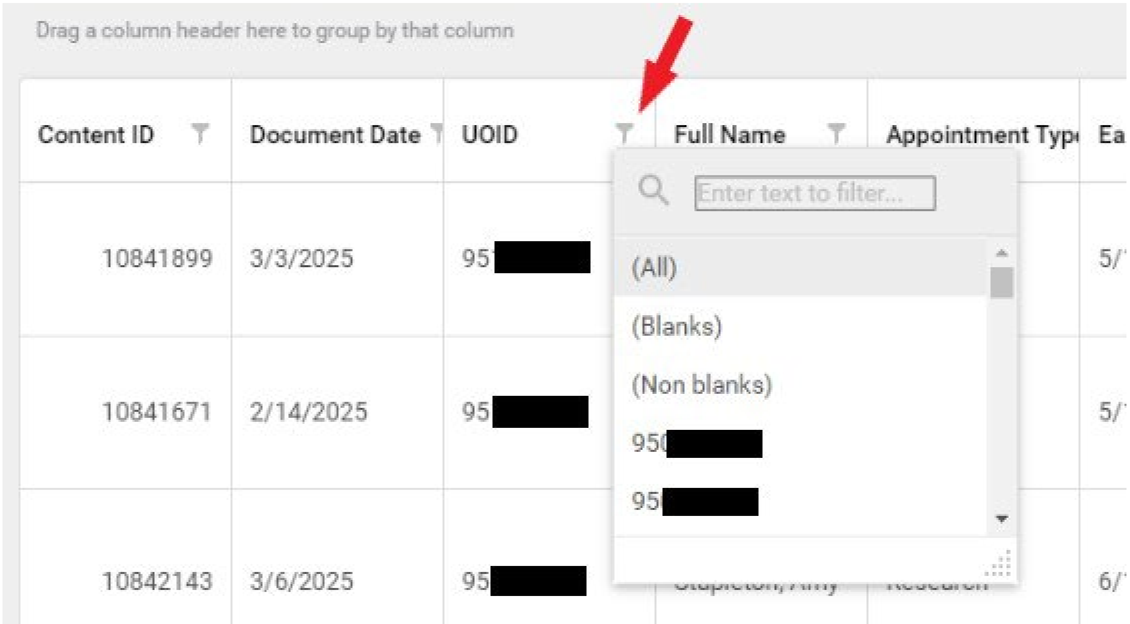
BA/HR- SAR- All SARs (In Process and Archived)- global report which will show SARs in and out of workflow (this includes archived and cancelled SARs).

BA/HR- SAR- Workflow Activity (All)- shows how long submissions sat in each queue.

These reports can be exported to Excel by selecting the **Export Data** button on the top right or they can be filtered in DuckDocs by selecting the filter icon next to a column name.



You can filter the reports by submitter name to narrow down to only your submissions. Otherwise, all SARs will be viewable depending on the report selected.



With these reports, you will be able to see where submissions are at various stages of the process. Specifically, you can see where an item is in workflow using Workflow Status, verify which approver the SAR is pending using Active Approver Email with or seeing how long something has been pending in a particular queue. Time in queue is tracked by hours.

Finding Individual submissions

Document Retrieval

Submitters, HR, and Payroll may retrieve a SAR for reference. In the DuckDocs Web Client, navigate to **Document Retrieval** by clicking  then **Document Retrieval**.

Next, select the document type **Summer Appointment Request - BA/HR**. You will then be able to narrow the results using a document date range and by specifying keyword values and clicking **Search**.

There are a number of fields available to search. If there are no results, be sure all fields are clear before inserting your search parameters again. UO ID is the best search filter if looking for a particular individual’s appointment. Otherwise, the report is versatile and can search for items based on keywords

The form does provide a Clear All feature at the button next to the search button.
The Icon in order from left to right are:

Query History- shows recently made searches
Clear Keywords- clears keywords in fields
Clear All- clears keywords and history and closes the report

Notification of Completion

Once all processing of the request is complete, a notification will be sent to the submitter from DuckDocs (duckdocs@uoregon.edu) with the following subject:

S**AR Processing Complete for Last Name, First Name (UOID)**

A link to the document will be included in the message.

SARs will stay in the “Completed” queue for 90 days before being archived. Archived forms will be accessible through the “All SAR” Submissions report detailed in the next section.

Frequently Asked Questions

Access and Approver Questions

Can you reassign submitters while its pending in their queue?
Not at this time. If you need to adjust approvers, the current queue needs to return the SAR to the submitter for those types of edits.
Submitters will be able to remove and reinsert the approvers. However, multiple lines may need to be edited to maintain the order which the approvers appear. Remember, the SAR will be sent to the approvers in the order they appear on the form.

If that approver is unavailable, submitters should reach out to HROps@uoregon.edu for help.

Saving a SAR outside of DuckDocs

How can I save a completed SAR for our department’s files?

You are encouraged to access SARs within DuckDocs itself, but there are cases in which a department needs to save completed forms outside of DuckDocs in a department or personnel file. To save a SAR outside of DuckDocs in the Web Client (either using Document Retrieval or by going directly into the Workflow queue) you can right-click on an item in a list and choose **Send to** then **File,** then select the **Image (.tif)** format and click **Save.**

Locked Documents

Why am I unable to edit items returned to me?

In DuckDocs (OnBase), items become locked if they are being viewed or edited by someone else. If you are unable to edit items returned to you in a workflow, they may be locked by another user. You can identify who may have the document locked by right-clicking on the item in the list view and choosing view Keywords.

How do I remove a lock on a document I no longer need to view?

In the Web Client found at https://duckdocs.uoregon.edu, once you have logged in, you may click the Main Menu button , then click **Locked Objects** under the User heading to view your currently locked documents.

If you are no longer accessing the item, select it in the list, then click Remove Lock.

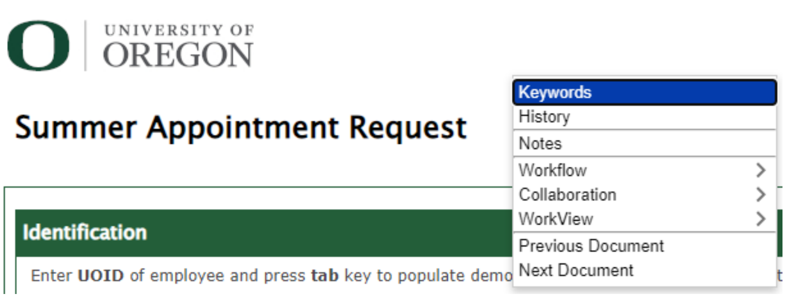
Why am I seeing a Locked Objects pop-up when I log into DuckDocs (OnBase)?

If you have any documents or objects locked when you login to the DuckDocs Web Client, a pop-up will appear notifying you of these locks and giving you the opportunity to remove them so others can access the documents or other objects. It is OK to go ahead and remove the locks.

Notes (HR and Payroll)

How can I create Notes on documents to communicate about actions taken with my colleagues?

To add a note to a document in the Web Client, right click on an open document and choose Notes. This does not work on a new unsaved form.



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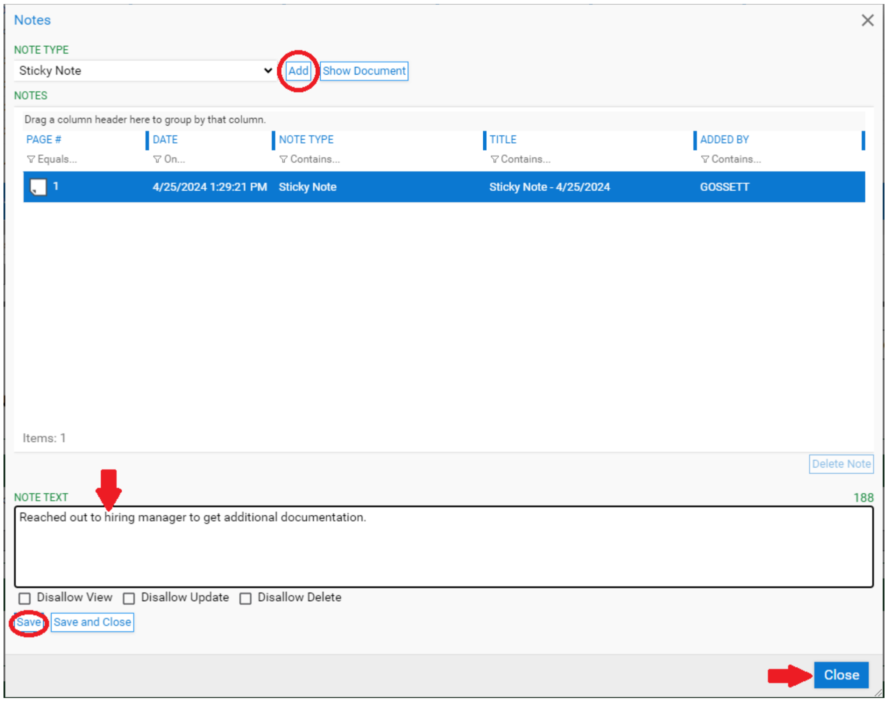
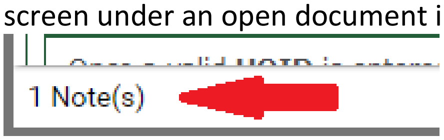


How do I view Notes on Documents in OnBase?

You can tell whether there is a note attached to a document by looking at the bottom left of the screen under an open document in the Web Client.



To view the text of the note, click the Note(s) text under the opened document and click the specific note in the list. The text will appear below in the NOTE TEXT box.

If you have privileges to do so you may also Delete or Edit the Note above the NOTE TEXT box.