Office of General Counsel OnBase Supplement
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Introduction

Welcome to the Office of General Counsel supplement to the BGSU OnBase documentation. This document describes processes unique to the BGSU Office of General Counsel.

- For more information on the general use of OnBase such as scanning, indexing and retrieving documents, see the other OnBase documentation at http://www.bgsu.edu/its/digitalservices/page51503.html
Matter Numbers and Summary Sheets

Matter Summary Sheets

Matter Summary Sheets are custom forms which allow you to quickly record and view the most important facts about a matter. It also generates a unique number called a Matter Number, which is used to identify all documents related to that matter. For more information on matter numbers, see Matter Numbers.

To create a new matter summary sheet:

1. Click the File menu, select New, then Forms.
2. Select GC Matter Summary Sheet (eform).
3. Click Create.

Or

1. Click the New Form icon in the main toolbar.
2. Select GC Matter Summary Sheet (eform).
3. Click Create.

The date and matter number listed in red are automatically generated by the OnBase system. Note the matter number, and fill in the remaining form fields. When the form is completed, click the Select button to save it.

Matter Numbers

Matter numbers are unique numbers used to identify a matter. They are randomly generated when a new Matter Summary Sheet is created. When indexing or retrieving documents, matter numbers act like any other keyword field.
• For more information on indexing documents, see the other OnBase documentation found at http://www.bgsu.edu/its/digitalservices/page51503.html

• For more information on retrieving documents, see Custom Queries or the other OnBase documentation at the location shown above.
Custom Queries

Custom Queries Introduction

A custom query form has been created to make retrieving documents faster and easier. Custom query forms are customized search forms that allow you to focus on only the most important keyword fields when searching for documents.

To open the Office of General Counsel custom query:

1. Click the File menu, select Open, then Custom Query.
2. Select All Custom Queries.
3. Select GC Search for Matters.

Or

1. Click the Custom Queries button in the main toolbar.
2. Select All Custom Queries.
3. Select GC Search for Matters.

GC Search for Matters

The GC Search for Matters form allows you to search for documents by date, matter number, status, parties, and matter type. Status, parties, and type can be selected from a drop down list by clicking the drop down button. Click Find to display a list of retrieved documents.

To search for a document using more than one matter number:

Double click MatterNumber on the search form.

Or
1. Click in the **MatterNumber** text box.
2. Press **F6**.
Workflow

OnBase workflow is an document routing system that allows the Office of General Counsel to manage work more quickly, accurately, and efficiently. Workflow breaks office processes into individual tasks, which can be managed and tracked. The workflow system is divided into Life Cycles and Queues.

Life Cycles

Life Cycles are the complete process a document goes through, including all steps. The Office of General Counsel has two separate life cycles:

- Main Life Cycle
- Records Request Life Cycle

Queues

Each Life Cycle is made up of one or more Queues. A queue is simply a point in the workflow where work is performed on a document. A document will be added to a queue and will be removed when the work required for that queue is completed.

The queues for the Main Life Cycle:

- GCA Initial
- GCA DCD
- GCA Summary Sheet Creation
- GCA Fill
- GCA Work Assignment
- GCAU Initial
- GCAU Update
- GCR Initial
- GCR Review
• GCM Initial
• **GCM Suspense Date**
• **GCM Overdue**

Of these queues, only the underlined queues require user action. The remaining queues are used by the OnBase system itself to sort and check documents.

**Workflow in Action**

Below is a chart of the basic workflow process as seen by the users. Queues monitored by the General Counsel are in purple, queues monitored by staff are in blue.
Opening Workflow

To open workflow:

Click on the **Workflow** button in the main toolbar.

Or

Click on the **User** menu, then select **Workflow**.

![Workflow Image]

Summary Sheet Creation

If a document enters the workflow system without a matter summary sheet, the OnBase system will move the document to the **GCA Summary Sheet Creation** queue. This queue allows users to create a matter summary sheet.

Assignment

After a document has been entered into the OnBase system and the system has ensured it has a matter summary sheet, the document is moved to the GCA Assignment Queue. The GCA Assignment queue allows the General Counsel to assign the document to one or more staff members using the Assignment Sheet form.

To assign a document:

1. Select the **GCA Work Assignment** queue.

![Assignment Image]

2. Select the document to be assigned.
3. Double click the **Create Assignment Sheet** button in the right panel.

4. Select the staff member from the **Assigned To:** drop down list.

5. Enter the suspense date.

6. Enter any document notes.

7. Click the **Submit** button.

8. Repeat steps three through seven to assign a document to multiple staff members.

9. When finished, double click the **Review Complete** button.

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**Monitoring**

After a document has been assigned to a staff member, it is listed in the **GC Monitoring** (GCM) Queues. These queues allow the assigner to view when assigned documents are due, view documents that are overdue, reassign documents, and set new due dates for documents.

There are two GCM queues:

- **GCM Monitoring** shows all on-time assigned documents
  - Documents in the GCM Monitoring queue can be reassigned.

- **GCM Overdue** shows all late documents
  - Documents in the GCM Overdue queue can be reassigned and/or given a new due date.
GCM queues in action

The chart below shows the movement of a document through the GC Monitoring queues, including available actions.

Reassigning and Changing the Suspense Date of a Document

Documents can be reassigned in the GCM Suspense Date and GCM Overdue queues. Document suspense dates can be changed in the GCM Overdue queue.

To reassign a document:

1. Select the queue.
2. Select the document.
3. Double click the Reassign Document button.
4. Click the Yes button.
5. Select the new staff member from the drop down list.
6. Click the Submit button.

To change the suspense date:

1. Select the GCM Overdue queue.
2. Select the document.
3. Double click the Update Suspension Date button.
4. Enter the new suspense date.
5. Click the **Submit** button.

**Review**

The **GCR Review** queue contains the assignment sheets that need to be reviewed by staff and completed. In the GCR Review queue, staff can add notes to the documents and mark the documents as complete. Once the document has been marked as complete, it will be removed from the queue.

**Filtering Documents**

You can filter the documents you seen in a queue by the staff member the document is assigned to, the matter info, or suspense date.

To filter documents:

1. Right click anywhere in the document list, select **Filter Inbox**, and select the filter you wish to apply.
   - Staff member
   - Matter info
   - Suspense date

2. Use the GC Filter form to select your filter or filters.
   - **Staff member:**
• Matter info:

![Matter info](image)

• Suspense Date:

![Suspense Date](image)

3. Click **Submit**.

To remove a filter:
Right click anywhere in the document list, select Filter Inbox, and select **<No Filter>**.

**Adding Notes and Completing Documents**

To add a note file to a matter:

1. Select the GCR Review Queue.
2. Select the document.
3. Double click the **Note to File** button.

![Note to File](image)

4. Enter the note text into the **Note Detail** text box.
5. Click the **Submit** button.
To mark a document as complete:

1. Select the GCR Review Queue.
2. Select the document.
3. Double click the Complete button.
4. Click the Yes button.
Folders

The OnBase File Cabinet and Folder feature allows you to view all documents in a matter as a list in a folder. It also allows the organization of documents into smaller groups within an individual matter. Folders can also be searched to make document retrieval easier.

Opening File Cabinets

To open the File Cabinets window:

Click on the File Cabinets button.

Or

Left click on the File menu, then Open submenu, then File Cabinets.

Or

Press Alt, F, O, C.

Finding and Opening a Folder

To find and open a folder:

1. Double click on GC - File Cabinet.
2. Click on either MATTER CASE FILES or PUBLIC RECORDS REQUEST.
• The **Folders** dialog box will open.

![Folders dialog box](image)

3. Enter the primary party into the top text box
   • This will narrow the list of folders below.

4. Double click on the folder to open it.

**Creating a New Folder**

To create a new folder:

1. Right click on the matter folder, then left click on New Folder.
2. Enter the name of the new folder in the FolderName text box

3. Click Save.
Moving a Document to a Different Folder

To move a document to a different folder:

1. Right click on the document you wish to move and select **Keywords**.

2. Erase the contents of the **FolderPath** text box.

- The new folder will be created.
3. Left click on the drop-down button and choose the new folder name.

4. Click **Apply**.
   - The document will be moved to the new folder.
Viewing Subfolders and Documents

To view subfolders:

Left click on the expand button to the left of the folder.

To view documents in a folder:

1. Left click on the folder.
   - The documents contained in the folder will be shown in the panel below the folder tree.
2. Left click the document to view in the right panel.