Kapiolani Community College

BOSS

Business Online Submission System

User Guide

(Updated 2021.11.12)

Table of Contents (Click Section Titles to Quick-Jump)

A. Disclaimer

- BOSS only supports typical, non-emergency requests within the campus' fiscal authority (generally those costing less than $25k). Contact the Business Office for major or complex requests. Contact the Vice Chancellor for Administrative Services immediately for emergencies.
- BOSS is not guaranteed to detect or validate all situations and policies. Additional actions may be required from the Requestor after submission.

B. Important Web Links

BOSS Form: https://hawaii.kualibuild.com/app/builder/#/app/618061f84fd3e00cc5a1626c/run

Action List: https://hawaii.kualibuild.com/app/builder/#/actions

Submissions List: https://hawaii.kualibuild.com/app/builder/#/my/submissions

Drafts List: https://hawaii.kualibuild.com/app/builder/#/my/drafts

Business Office Website: https://ohana.kapiolani.hawaii.edu/departments/business-office/

C. Introduction to the Business Online Submission System (BOSS)

Welcome to the Business Online Submission System, or BOSS. BOSS serves as the sole method of digital/electronic submission of procurement, fiscal, and similar business requests for the campus. Leveraging available technology (KualiBuild), BOSS aims to enable digital submissions to the Business Office in a standardized, organized, efficient, responsive, and transparent manner for the Requestor.

It is important to recognize that BOSS is only a channel to submit fiscal business requests to the Business Office; it is not a planning platform or replacement for any entries into an official UH system (Kuali, Concur, etc.). **A BOSS form should be created and submitted at the end of your preparation process where the Business Office's final approval is the last remaining step.**

The following pages will provide you with written guidance on the use of BOSS, but the best way to learn is to get firsthand experience. BOSS is created to be intuitive and system-guided, but if there are any questions, please contact your Fiscal Specialist.

D. Instructions for Completing a BOSS Form

1. **Complete all prerequisite tasks and approvals prior to BOSS submission to the Business Office.**
   a. The BOSS form is to be the very last step of the Requestor's work process for the respective request.
   b. Any forms or reports in the respective KFS, RCUH, eTravel, or Concur system shall be submitted by the Requestor and now in the Business Office's Action List.
   c. All supporting documents shall be completed and signed, ready to upload into BOSS.

2. **Create a BOSS Form**
   a. **Go to the BOSS form**. A new numbered form will automatically begin.
   b. **Enter requesting department's information** and a description or title.
   c. **Identify the purpose of the submission**, beginning with the financial or information system that processes the request, followed by the specific type of request.
   d. **Fill in the form fields** in the order they appear, working progressively downwards.
      i. Your responses will affect the subsequent fields and prompts/warnings that appear.
      ii. Do not backtrack to previous sections to change responses and it will cause form errors — discard the form and start a new form instead.
   e. **Select how required documents will be submitted** in the "Supporting Documents" section. A list of <u>minimally required</u> documents based on your form responses will be generated.
      i. If "Digitally" was selected, upload each document requested. Digital signatures on uploaded documents must be signed through an approved method:
         1. UH Documents: Adobe Digital Signature (see EP 2.216 and EP 2.218).
            a. Adobe Acrobat Digital ID (this is different from the prior line) is acceptable for UH-internal documents (guidance from ITS).
         2. RCUH Documents: ETS e-sign for RCUH (see P&P 2.013).
      ii. If **ALL** documents are not available digitally, select "Physically" and either:
         1. Submit everything in physical medium; or
         2. Use the "Additional Documents" section to upload your partial collection of digital documents.
      iii. **If you do not have all the required documents completed and available, you are NOT ready to submit the request to the Business Office**. Please "Save" your BOSS form. After completing all supporting documents, return to your saved BOSS draft to complete uploads.
   f. **Select additional personnel to receive automated status notifications** along with you.
   g. **Select your designated Fiscal Specialist** in the "Routing Selection" section. This is who the BOSS form will go to for review and approval.

3. **Submit BOSS Form**
   a. **Review the BOSS form** to ensure all required fields (noted by *) are completed, there are no warning prompts (highlighted in red), all required documents are uploaded or ready to mail, and the correct Fiscal Specialist has been selected.

    b. The form is ready to submit when the bottom of the form shows "<mark>FINAL STEP COMPLETED</mark>" in addition to satisfaction of the prior statement.

    c. **Click "Submit"** which will complete your submission. An automated email will be sent to your UH email address to confirm transmittal was successful.

        i. If the option to physically submit supporting documents was chosen, please return to your BOSS form (a copy will be available in the confirmation email), print it out, and use it as the cover page for your document packet when sending to the Business Office.

    d. If the occasion arises after submission, the Requestor may withdraw the BOSS form from the [Submissions List](). This cancels the submission entirely.

4. **Business Office's Review of BOSS Form**

    a. The selected Fiscal Specialist will be automatically notified of your BOSS form.

    b. At initial review, the Fiscal Specialist will solely confirm your routing choice or re-route to the appropriate Fiscal Specialist.

    c. At final review, the Fiscal Specialist will review the BOSS and make a determination:

        i. **Approved**: The BOSS form (and associated request) will be approved when the BOSS form is complete, responses are accurate, and all documents are completed. [Submission List]() status will show "<mark>COMPLETE</mark>."

        ii. **Returned**: The BOSS form will be returned to the Requestor if the BOSS form responses have minor to moderate inaccuracies or any required documents have not been received. Returned documents can be corrected and resubmitted from your [Action List](). [Submission List]() status will show "<mark>IN-PROGRESS</mark>"

        iii. **Denied**: The BOSS form (and associated request) will be denied if the BOSS form responses are concerningly inaccurate or incomplete, or the associated request itself is denied. [Submission List]() status will show "<mark>DENIED</mark>"

    d. **The Requestor's notification of the determination made shall be through the automated email from "Kuali Notifications."**

        i. If approved, a copy of the BOSS form will be attached to the email. Navigate to the bottom of the attached form as it will contain download link(s) for any documents from the Business Office (such as a PO, IDO, etc.). **This is the sole method of digital transmission of awarded documents and it is the Requestor's responsibility to retrieve such documents from the completed BOSS form**.

5. **End of BOSS Submission Process**

    a. The BOSS form's lifecycle is closed when it is in COMPLETE, <mark>DENIED</mark>, or <mark>WITHDRAWN</mark> status. If you withdraw the form, it will appear in your [Drafts List]() where you can revise and resubmit it, or discard it.

    b. Any BOSS form with any of the prior three statuses cannot be reopened. Any related follow up actions (such as submitting an invoice for the PO that was approved) must be submitted through a new BOSS form.

E. Recommendations and Tips for Best Use of BOSS

1. Use BOSS for physical submissions too. While optional if <u>all documents</u> will be submitted physically, use of BOSS is still highly recommended to help you organize, standardize, and centralize your submissions to the Business Office. BOSS is **required** for digital or partially-digital submittals.

2. Answer form fields accurately and adherent to UH and/or RCUH policies. If you are unsure, confer the UH/RCUH policies and with your Fiscal Specialist. Do not provide inaccurate answers to circumvent policy requirements and prompts, as this will cause the form to be returned or denied, only serving to delay the end goal.

3. Comments on select form fields:
   a. "**Brief Description or Title for Request**": This will appear in the Requestor's automated notification emails. It is to the Requestor's benefit to write a useful description.
   b. "**Are all areas compliant with UH procurement policies and campus internal policies?**": A very broad question but the most important one to answer accurately. If you are unsure, verify with UH/RCUH policies and confer with your Fiscal Specialist.

4. Monitor for emails from sender name "**Kuali Notifications**" which are the automated emails sent by BOSS via KualiBuild. This is the sole method of notification for your BOSS form's status.

5. Monitor your [Action List](#). Sometimes, emails may be missed or forgotten but the Action List will always show **<u>submitted</u>** BOSS forms awaiting an action from you.

6. Upkeep your [Drafts List](#). Every time the BOSS form is opened, a new form is started. If you will not complete it, close the form using the "Discard" button, otherwise, it will save in your drafts and make it difficult to find your true working drafts. Clear out false drafts regularly.

F. FAQs and FYIs

1. **Why can't I access the BOSS form?**
   a. Blanket access is given to KCC staff and faculty; new employees automatically gain access. RCUH employees on campus fall outside of this auto-populated group and need to be individually added. Please contact your Fiscal Specialist for access.

2. **I want to submit a mix of digital and physical documents but I can only choose one option when BOSS asks "How will you submit your supporting documents?"**
   a. By design, BOSS forces ONE option to be chosen to ensure ALL documents are delivered through a single channel in a single delivery. This aids to prevent lost documents, submission completion delays, and overall confusion that may arise. If mixed delivery channels become necessary, choose "Physically" and attach any partial digital documents in the "Additional Documents" section.

3. **BOSS is asking me to upload "File A" and "File B" but I have File A and File B together in one document, File AB. How should I upload this?**
   a. Split your document to segregate the files into A and B, and upload into their respective file upload slots. Adobe (free for UH employees), for example, can do this easily. If you cannot split due to file protection, upload File AB in both slots.

4. **I want to check my attachments before I submit but I cannot click on them to open.**
   a. Please check your file before uploading it. You can remove the attachment and reattach it, if you are unsure what was selected. After the BOSS form is submitted, revisiting the form from your Submissions List will allow you to download your attachments.

5. **Do I upload my PCard receipts into the BOSS form? Do I still need to keep the original receipts for 1 year?**
   a. The BOSS form is solely for the submission of your bank statement to your Fiscal Specialist. BOSS does not replace any PCard and Concur responsibilities and functions. It also is not a repository for receipts; please physically store your receipts as required by PCard policy.

6. **Can I submit multiple requests (e.g., two separate requisitions) in one BOSS form?**
   a. No, by design, only one request per BOSS form can be submitted. Each request is different, possessing unique attributes and situations requiring individual assessment.

7. **The Submissions List only shows names of forms I've submitted; lacking descriptive details for each. Is there a way to add more information to this page so I can discern between my BOSS form submissions and find specific past forms?**
   a. No, the Submission List is a feature of the overall KualiBuild program and cannot be modified by KCC, unfortunately. It will be communicated if this ever changes in the future. For the time being, the Submission List should only be used to monitor **pending** BOSS forms — not as a record log for past completed submissions.

8. **Is BOSS here to stay?**

    a. Yes, it is intended to be a permanent tool for as long as viable. There are, however, external factors that could impact BOSS. Those being the availability of KualiBuild from ITS and the OPM and OGC's authorization to accept digital signatures. These are unpredictable from the campus' position, but not expected to be a concern at this time.

9. **If I submit a BOSS form, can notifications be sent to others?**
    a. Yes, as of 11/10/2021, a new section has been added – titled "Optional Additional Notifications" – that will allow up to two (2) additional UH personnel to be selected to receive automated notification emails for that particular BOSS form.