
STATE CONTRACTS DATABASE END USER TRAINING AND ONBOARDING MANUAL

Updated July, 2025
Administrative Services –
Materiel Division

Solution Access | Manual and Bulk Upload Procedures | Document
Management

STATE CONTRACTS DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

TABLE OF CONTENTS

Solution Access - Active Directory.....	3
Upload Procedures	5
Manual Upload Procedures - Importing Documents	7
Manual Upload Procedures – Creating a revision.....	11
Manual Upload Procedures – Workflow	12
Redaction queue.....	14
Redaction Bypass.....	15
Approval and Final Approval Queues	15
Approval Bypass.....	15
Hold Queue	16
State Purchasing Bureau Processed Documents	16
Manual Upload Procedures – Document Retrieval	17
Document Types	17
Editing A Document Index	19
Document History.....	20
Removing Public Access and Deleting a Document.....	21
Manual Upload Procedures – Forms	23
DAS LB429 SYS Doc – Agency Contact Form	23
Manual Upload Procedures – Web Client	23
Validity Report – Convert to Excel Document	24
Updating Contact Information Validity Reports.....	25
Bulk Uploads – Document Import Process (DIP) by Secure File Transfer Protocol (SFTP)	28
SFTP SETUP	28
Bulk Upload Procedures – SFTP Uploading Process.....	30
Bulk Upload Procedures - Access.....	30
Automated Scheduled Bulk Uploads	32
Bulk Upload Procedures –Index/Pointer File	33
Solution Overview	36
Solution Access – ECM OnBase Unity Client.....	37

STATE CONTRACTS DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

Solution Access - **Active Directory**

Agency users are provided access to the **DAS LB429 Solution** through membership in the Active Directory Security Group for the solution. The solution has three levels of security and a fourth group for users of the SFTP Bulk Upload process. The three levels are:

LB429 Admin: The highest-level group. Members of the Admin group have full permission to upload documents, search, edit, and delete uploaded documents, redaction, and approval. Members of the Admin group are the only members who can sign up for the Weekly Validation Report generated by the system.

LB429 Approver: The mid-level group. Members of the Approver group have permission to upload documents, edit uploaded documents, search uploaded documents, and to redact and approve documents.

LB429 Indexer: The low-level group. Members of the Indexer group have permission only to upload documents; they do not have access to the Workflow or Document Retrieval.

Agencies also use a standard identifier or acronym as a prefix to the standard group names, for example:

DMV LB429 Admin
DMV LB429 Approver
DMV LB429 Indexer

Each agency determines its own processes and procedures for authorizing and removing users from Active Directory Security Groups. It is important that access granted by security group membership be considered and that checks be put in place to ensure that users are placed in appropriate groups. Some agencies manage their own Active Directory security groups, while others are managed by the Office of the Chief Information Officer (OCIO). If unsure who handles user account and security group management for your agency and you are unable to locate that information, please submit a Help Desk ticket through the [OCIO Service Portal](#). **Indicate in the ticket that you would like the name of the STN Active Directory Technical Contact for your agency.**

STATE CONTRACTS DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

Though not necessary to have individuals in each group, an Agency should be aware of these few points when setting up its security:

- The agency should always have at least one person in the Admin-level group.
 - If the agency has only one user, they should be in the Admin-level group.
- Users should only be in one of the three groups at a time.
- There can be multiple users in each group as long as they are not in more than one group.

If the OCIO manages Active Directory for your agency, your agency still must determine the appropriate process for authorizing and removing agency users from the Solution Access security groups. The OCIO will accept tickets from the agency's authorized IT contacts or members of the agency's LB429 Admins security group for addition and deletion of user accounts from the LB429 security groups and will not seek additional authorization from Contract Administrators.

STATE CONTRACTS DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

UPLOAD PROCEDURES

For users with an @nebraska.gov account, use the ECM OnBase Unity Client to access the DAS LB429 solution.

To Begin: Log in to the Unity Client



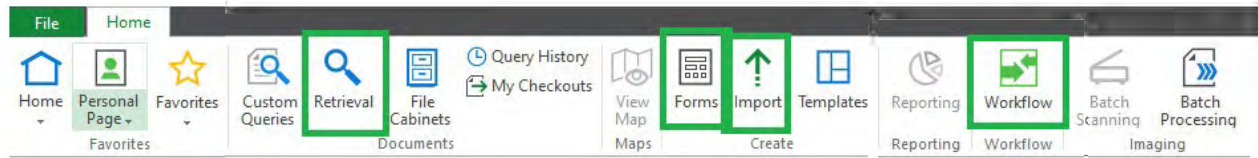
Depending on the user's installation, the user may or may not have the grey drop-down box labeled PROD. If the drop-down is available, PROD is the Production environment for live documents. CAT is the secondary testing area. All documents to be uploaded to the State Contracts Database should go through PROD.

- Be sure login is connecting to the STN domain
- Enter user name in the same format as user's @nebraska.gov email: first.lastname
- Enter password, the same as user's @nebraska.gov email

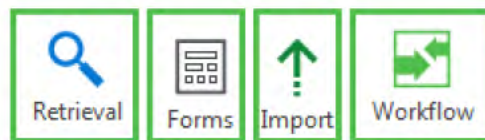
STATE CONTRACTS DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

Once logged in, the full OnBase window should be viewable with the tool ribbon of icons at the top (see figure below). Only some of these buttons are used in the DAS LB429 solution, and only by certain users. Here is what a user will likely see:



The four squared buttons are where the majority of the DAS LB429 solution takes place.



Retrieval is used to search for any previously uploaded document; it is visible to users in the LB429 Approver and LB429 Admin security groups.

Forms is used by members of the LB429 Admin security group to add users' emails to receive the Weekly LB429 Validity Report.

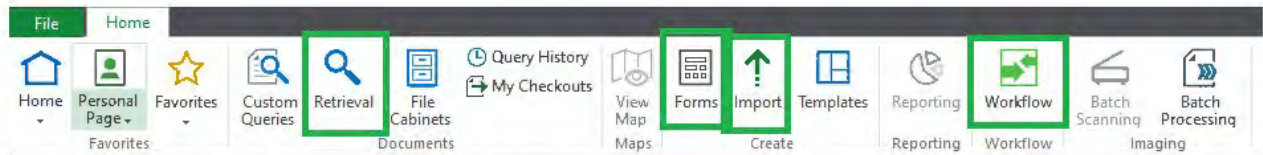
Import is used to upload documents to the Database. It is visible to all users in any LB429 Security Group.

Workflow is used to review documents in any of the lifecycle queues to make redactions, approve or reject uploaded documents, and track the status of documents uploaded to the Database. This button is only available to users in the LB429 Approver and LB429 Admin security groups

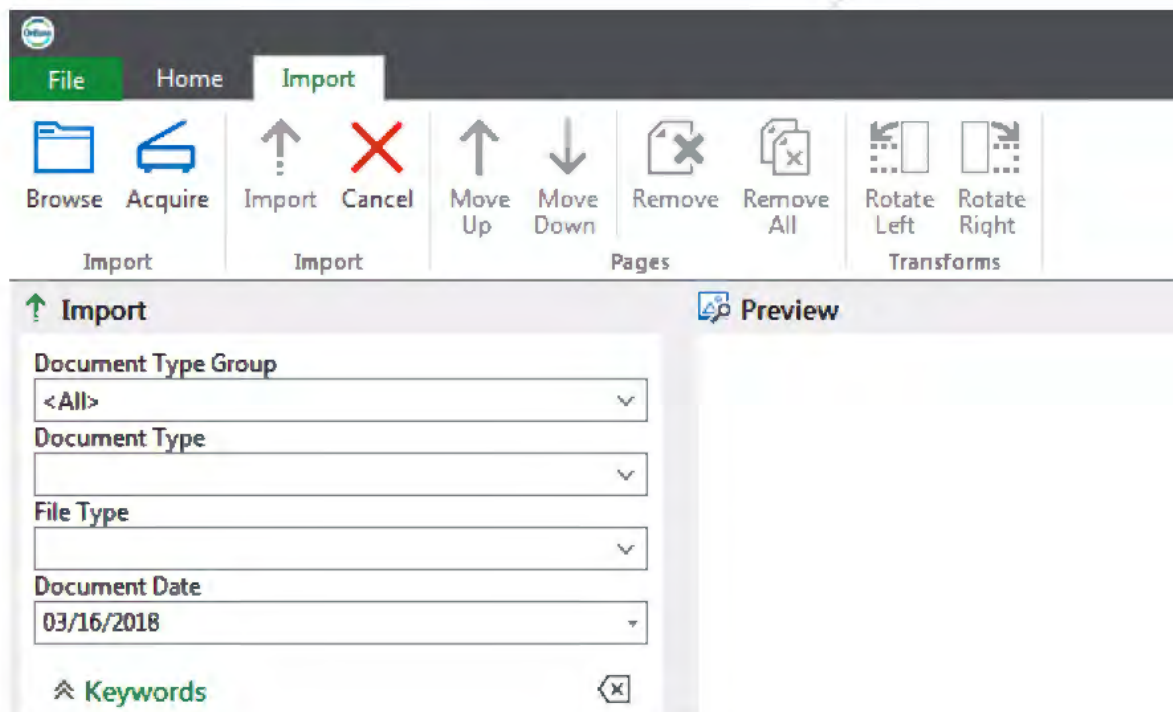
STATE CONTRACTS DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

MANUAL UPLOAD PROCEDURES - **IMPORTING DOCUMENTS**



Upon clicking the Import button, the upload screen will open. The process consists of two parts, the document upload and the document indexing. To upload a new document, either drag and drop the file to the preview section of the screen or select the Browse icon (top left) and continue with selecting the document from a saved location. The document should process into the OnBase software and display in the Preview box on the Import screen.



STATE CONTRACTS DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

Next, index the document by selecting appropriate keywords. Select the first drop-down box “Document Type Group” and select DAS LB429. *Depending on the software installation a user may not have this option.*

Select the second drop-down box and select the appropriate type of document being uploaded.

- If uploading a **contract**:
 - Choose the Document Type: “DAS LB429 Contract”



A screenshot of a web form with two drop-down menus. The first menu, labeled 'Document Type Group', has 'DAS LB429' selected. The second menu, labeled 'Document Type', has 'DAS LB429 Contract' selected. Both menus have a small 'x' icon in the bottom right corner.

- If uploading a **purchase order**:
 - Choose the Document Type: “DAS LB429 Purchase Order”



A screenshot of a web form with two drop-down menus. The first menu, labeled 'Document Type Group', has 'DAS LB429' selected. The second menu, labeled 'Document Type', has 'DAS LB429 Purchase Order' selected. Both menus have a small 'x' icon in the bottom right corner.

- If uploading a **supporting document**:
 - Choose the Document Type: “DAS LB429 Supporting Docs”



A screenshot of a web form with two drop-down menus. The first menu, labeled 'Document Type Group', has 'DAS LB429' selected. The second menu, labeled 'Document Type', has 'DAS LB429 Supporting Docs' selected. Both menus have a small 'x' icon in the bottom right corner.

Selection will determine the way the document is displayed on the website. As multiple documents can be attached to a single Data record, they can be separated by using these OnBase Document Types.

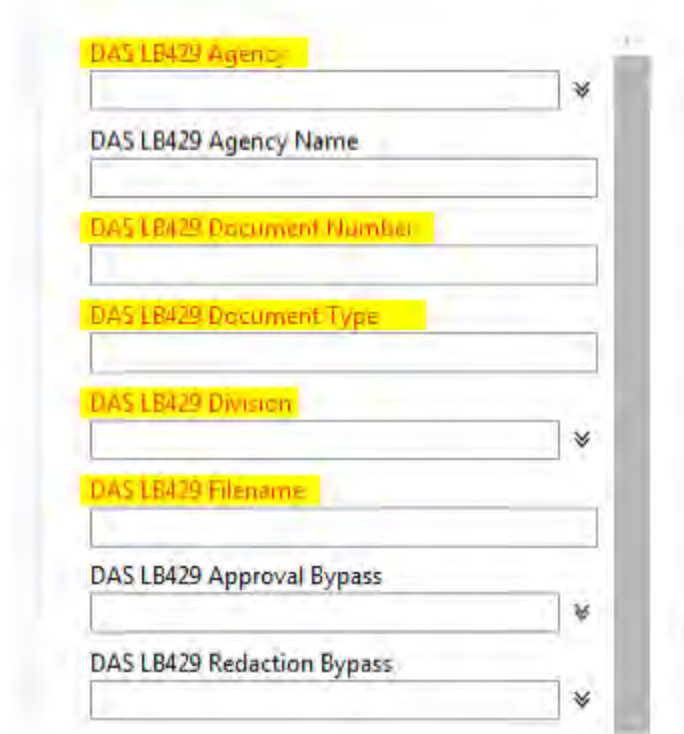
The File Type (third drop-down box) will auto-populate based on the file type uploaded.

The Document Date (fourth field) will auto-populate with the date of the upload. DO NOT MODIFY THIS DATE. This is intended to be the date of upload, not a start date of the contract.

STATE CONTRACTS DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

After selecting a Document Type from the list of three above, a new list of Keywords will appear in the blank space below Document Date:



The fields in red are required keywords. **It is recommended to also complete the Approval Bypass and Redaction Bypass keywords** (Y or N) when indexing a document. If such fields are **not** completed, the system will assume to **not bypass** redaction or approval queues.

The Agency, Document Number and Document Type are datapoints that match with data on the Data Records sent over from EnterpriseOne (E1) that ensure viewability on the public website. The data records from E1 must match the document's Keywords on those three datapoints exactly or there will be no match and the contract will not be viewable on the website.

- **Agency:** Agency's three-digit agency number, with a leading zero. (e.g. 033 – Game & Parks; SW is for State Wide contracts).
- **Agency Name:** Auto-populates based on Agency Number and is not required.
- **Document Number:** Document's Order Number from E1 (must match exactly, and does not include the Document Type, such as O4 or OP)
- **Document Type:** Document's Order Type from E1. (Must match exactly).

STATE CONTRACTS DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

- **DAS LB429 Division:** Auto-populates to “000” after entering Agency Number. This keyword is only used by the Universities and State Colleges. All agency documents need to be entered with the “000” keyword.
- **DAS LB429 Filename:** This keyword is the only free-form keyword. Up to 100 characters can be used to add a unique identifier on the document. Each agency can decide what naming structure they would like to use; however, the following naming convention used by State Purchasing Bureau is recommended:

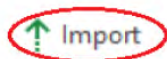
####-XX(MM-YY)
####-XX.AMDz(MM-YY)
####-XX.RENz(MM-YY)
####-XX.ADDz(MM-YY)
####-XX.EXTz(MM-YY)

= Contract or Order Number
XX = Contract or Order Type
(MM-YY) = Month and Year of the Document
AMDz = Amendment (number)
RENz = Renewal (number)
ADDz = Addendum (number)
EXTz = Extension (number)

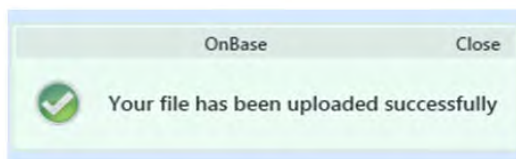
Filename Tips:

- To replace a document with another, see **Creating a Revision** below.
- To add an additional document, index new document with identical keywords, but use a *different* Filename. This will allow both new and old documents to be viewable.
- **DAS LB429 Redaction Bypass:** Enter ‘Y’ to bypass the redaction step of the process. Entering ‘N’ or leaving blank will move the document to the Redaction queue for redaction step.
- **DAS LB429 Approval Bypass:** Enter ‘Y’ to bypass the two-step approval process. Entering ‘N’ or leaving blank will move the document to the Approval queues for approval step.

After entering all appropriate keywords, click Import at the bottom of the Keyword column.



After clicking Import, the document will process into the ECM Workflow and a message will display in the bottom right of the screen indicating the document has been uploaded successfully:



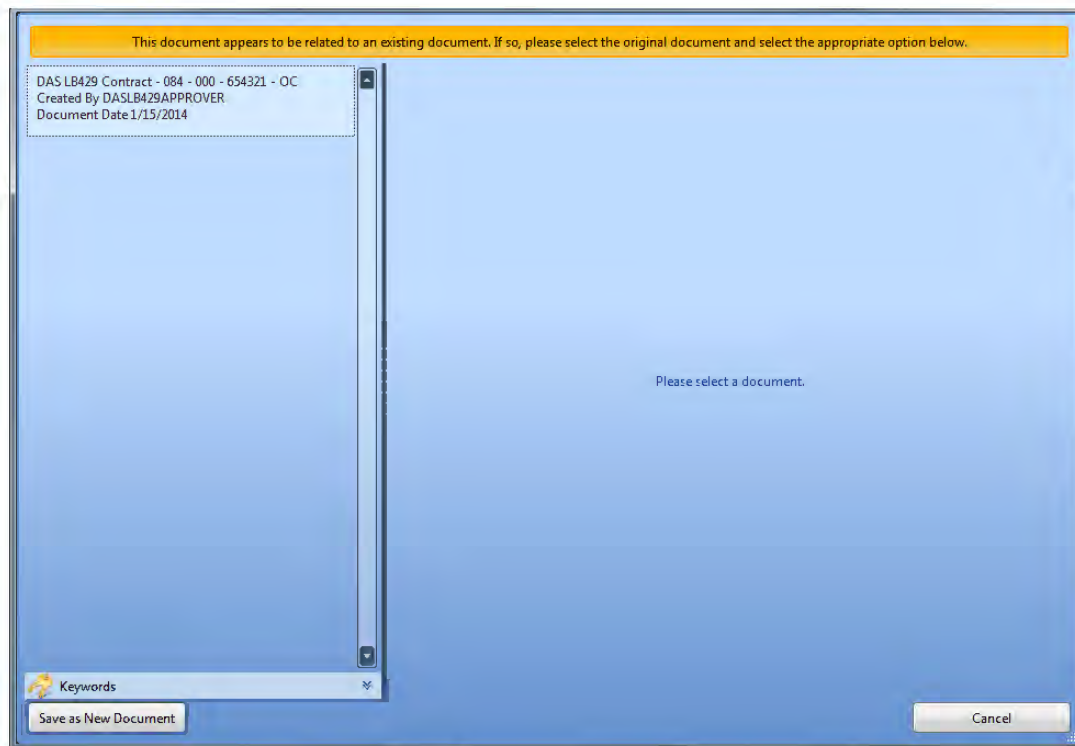
STATE CONTRACTS DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

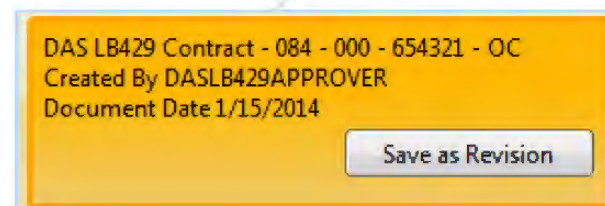
MANUAL UPLOAD PROCEDURES – **CREATING A REVISION**

If uploading a document to replace an existing document, follow all the same steps for a regular upload using the **exact** same keywords used for the original document, **including** the Filename.

After clicking Import, OnBase will check for matching documents in the system. If a document is found with all the exact same keywords, a new window will open:



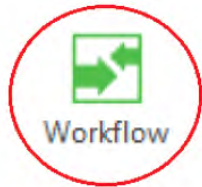
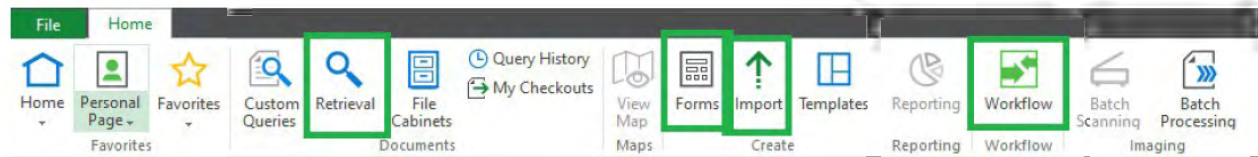
On the left will be the list of documents(s) that the system has found with the matching keywords. Select the correct document to revise by clicking. A preview of the document will show up on the right. Select the document to be revised and click on "Save as Revision":



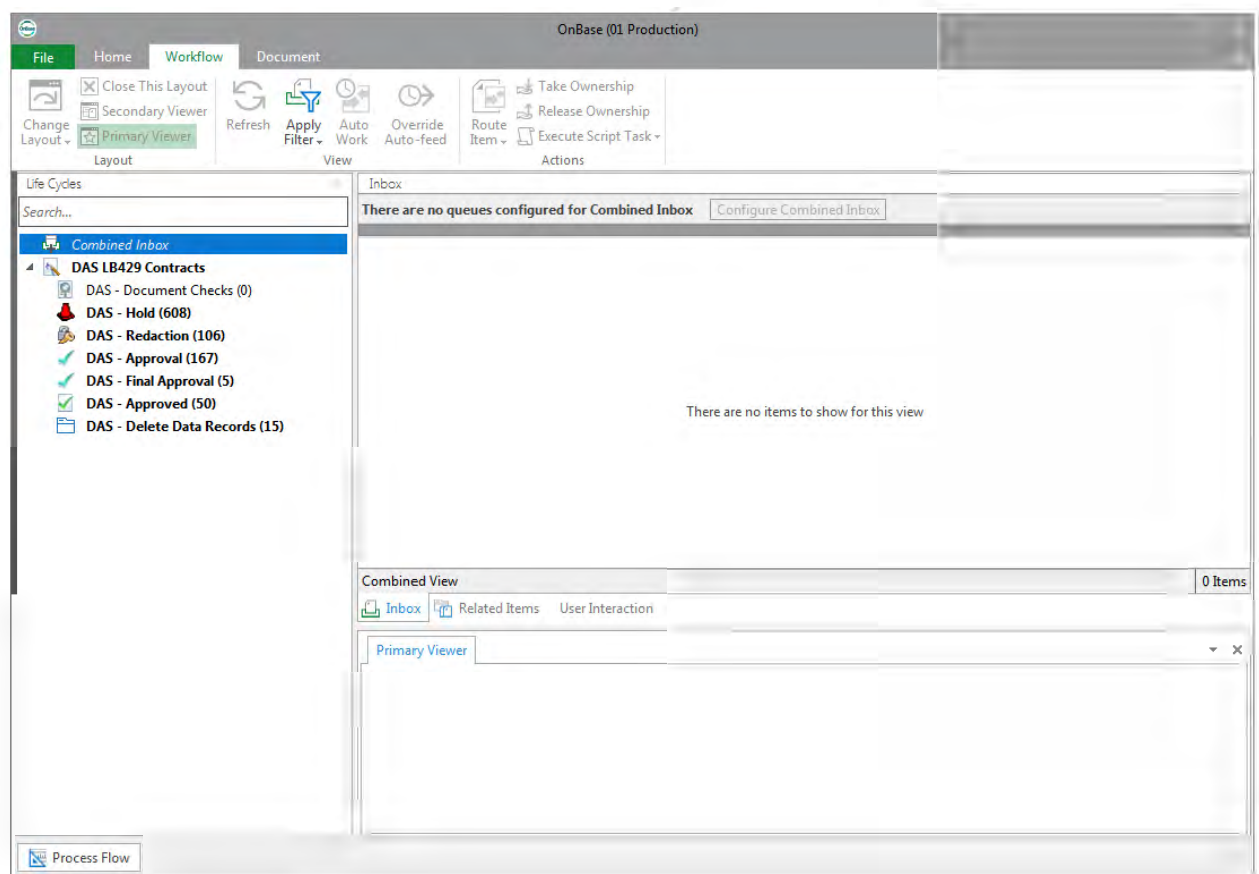
STATE CONTRACTS DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

MANUAL UPLOAD PROCEDURES – **WORKFLOW**



The Workflow interface is where most of the Database's process takes place. Documents must pass through various life cycle queues before they are made public. Some queues require input from Agency users, while others are on an automated schedule. Only an LB429 Approver or an LB429 Admin-level user have access to this interface. When users choose to enter the Workflow interface, they will see this screen:



STATE CONTRACTS DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

On the left are the Life Cycles users have permission to view. Clicking the drop-down arrow next at the front of the DAS LB429 Contract lines will display the Queues and how many documents your agency has in each. **Approvers or Admins should regularly check these queues to make sure items are moving along and not being overlooked. They will not appear on the validity report.**



Queues separate the documents by which task they need and display like folders in the DAS LB429 Contracts lifecycle.

- DAS – Initial
 - This Queue is not visible to users of any level. This is a holding measure into which all documents are placed after being uploaded. At 11:00am each morning, the Document-Data marrying process runs on all documents that are in the Initial Queue.
 - If a document matches to a data file, it moves into the Workflow; if a document does not match to a data file, it moves into the Hold queue.
-  DAS – Hold
 - This Queue holds all documents not matched to data files from E1.
-  DAS – Redaction
 - This queue holds all documents that require redaction.
-  DAS – Approval
 - This queue is the first step in the approval process and holds all documents requiring Approval for public viewing.
-  DAS – Final Approval
 - This queue is the second approval step in the approval process and holds all documents requiring Final Approval for public viewing.
-  DAS – Approved
 - This queue holds all documents approved for public viewing, and will wait in this queue until 5:00pm daily, before going live to the public.

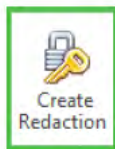
STATE CONTRACTS DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

REDACTION QUEUE

The Redaction queue is only compatible with **.TIF** document types or other true image type files. If the document uploaded is a .TIF or other true image type file, redactions can be made within OnBase. If uploading PDF file types, it is recommended to perform any necessary redactions on the PDF prior to uploading the document. To make redactions on a .TIF document, follow these steps:

1. After selecting the document in the Redaction queue, left click the Create Redaction button in the tool ribbon under the Workflow tab. This will open the document for redaction.



2. Once the document is open for redaction, select the page that requires redaction from the viewer in the bottom half of the screen. At the top of the screen under the Document tab, is a button in the Notes section for DAS Redaction. Use this button to draw a black box over the information that needs to be redacted.
3. The black box is the redaction. It is moveable and scalable. Move and scale the box as appropriate to cover the information requiring redaction.
4. Repeat steps two and three as necessary for all redactions. A new document window will pop up after each redaction; close these and continue. Do not select any of the Redaction Options for the moment and create the redaction(s).
5. Once finished creating all redactions, return to page 1 of the document and create a new redaction with the right click menu, selecting Redaction → Create New Redaction. Check the box to Delete Redaction Notes after creating and click the Create Redaction button again.
6. The document will pop up in a new window again. Close the window and hit the refresh button in the Workflow Ribbon.



7. Click the Redaction Complete button to close the document to redaction and to move it along into the Two-Step Approval Process.



STATE CONTRACTS DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

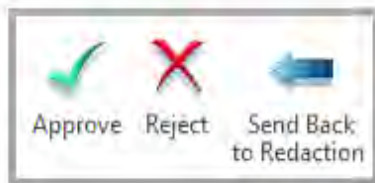
REDACTION BYPASS

Federal Tax Identifications Numbers and Social Security Numbers are to be redacted by Statute 84-602.04. If your agency deems it appropriate to redact additional information, redaction can be completed prior to uploading a document into OnBase. Due to software restrictions, .PDF documents are not able to be redacted in OnBase. The Redaction Bypass keyword becomes especially useful when uploading only .PDFs. This Keyword, indexed to a document when it is uploaded, allows the document to skip this Queue entirely. Simply enter a “Y” in the DAS LB429 Redaction Bypass field when uploading the document to engage the Bypass.

APPROVAL AND FINAL APPROVAL QUEUES

After passing through the Redaction queue, a document moves into the first of two Approval queues. Agencies are allowed to have the same user for both levels of Approval.

Users completing the Approval process must be able to review it for accuracy, clarity, redaction, completeness, and any other factors which may be present in the documents that are being uploaded for public viewing. After reviewing a document there are three options available for documents in the Approval Queues:



- **Approve:** Moves the document onto the next stage, either Final Approval or Public Access.
- **Reject:** Removes the document from OnBase. *(If rejected by mistake, the document will require re-upload)*
- **Send Back to Redaction:** Moves the document back to the Redaction queue for additional redaction work.

APPROVAL BYPASS

Like the Redaction Bypass, the DAS LB429 solution offers the option of bypassing the two-step Approval process. To enable this function simply enter a “Y” in the DAS LB429 Approval Bypass keyword field when indexing a new document. The Bypass can be used separately or in combination with the Redaction Bypass. **NOTE: any document that is uploaded with both Bypasses set to ‘Y’ will be made public immediately after they match with data, with no further review.**

STATE CONTRACTS DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

HOLD QUEUE

Documents in the Hold Queue did not match with a data file during the Initial Queue check. Anything that moves from the Hold Queue will stay for at least 24 hours. Every day that a document is in the Hold Queue it will check for a matching Data Record at 11:00 am each day. Documents in the Hold Queue for more than a couple days should be checked for keyword errors to researched to determine if document was uploaded in error.

STATE PURCHASING BUREAU PROCESSED DOCUMENTS

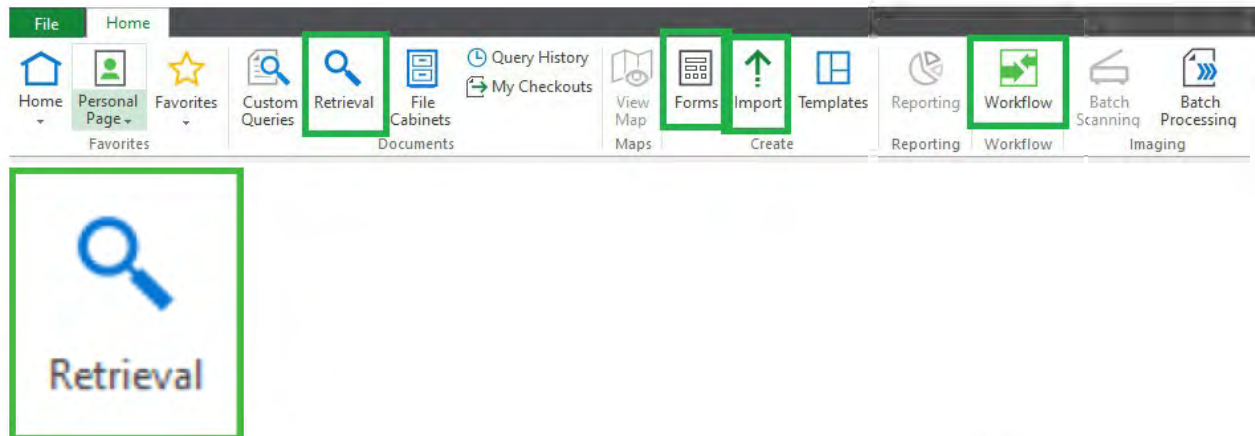
The State Purchasing Bureau (Materiel Division/Department of Administrative Services) is the only agency that can upload documents on behalf of another Agency. State Purchasing Bureau is responsible for uploading contracts processed by the Bureau on behalf of another Agency. If an Agency believes redaction is necessary or if SPB-processed contracts appear on an Agency's weekly validity report, please contact SPB directly.

All other questions should be directed to das.statecontracts@nebraska.gov.

STATE CONTRACTS DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

MANUAL UPLOAD PROCEDURES – **DOCUMENT RETRIEVAL**



DOCUMENT TYPES

Document Retrieval is only accessible by members of Approver and Admin security groups, and each are only allowed see certain items. The Retrieval function is the in-solution method of locating and viewing documents that have been uploaded by your agency.

- For Admins, the list of available documents looks like this:



- Approvers are only able to search for the following document types:
 - DAS LB429 Contract
 - DAS LB429 Purchase Order
 - DAS LB429 Supporting Docs

To search, select one document type or use the Ctrl + Left Click to select multiple document types from the list. The keywords fields available for searching on will appear below the Document Types listed in the left column. Many different options can be searching including date ranges of when the document was uploaded, all documents with certain Agency Number, or a specific Document Number or Type. An asterisk "*" can be used as a wildcard in searching.

STATE CONTRACTS DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

The screenshot shows the 'Document Retrieval' window. It has a top navigation bar with 'File', 'Home', and 'Document' tabs. Below this is a ribbon with icons for 'Home', 'Personal Page', 'Favorites', 'Custom Queries', 'Retrieval', and 'My Ch'. The main area is divided into two sections: 'Document Types and Groups' and 'Keywords and Date Range'. The 'Document Types and Groups' section has a dropdown menu set to 'DAS LB429' and a list of document types: 'DAS LB429 Contract', 'DAS LB429 Contract Validity Report', 'DAS LB429 Data', 'DAS LB429 Purchase Order', 'DAS LB429 Supporting Docs', 'DAS LB429 SYS Doc - Agency Contact Form', 'DAS LB429 SYS Doc - Assigned To Agency Approver', and 'DAS LB429 SYS Doc - Reporting Placeholder'. The 'Keywords and Date Range' section has fields for 'From' and 'To' dates, and a list of search criteria: 'DAS LB429 Agency', 'DAS LB429 Agency Name', 'DAS LB429 Document Number', 'DAS LB429 Document Type', 'DAS LB429 Division', 'DAS LB429 Agency Purchase Orders Value S...', 'DAS LB429 Agency responsible for Purchas...', 'DAS LB429 Contract Amount', and 'DAS LB429 Contract Begin Date'. There is a 'Note Search' checkbox and a 'Find' button at the bottom.

To search, select one document type or use the Ctrl + Left Click to select multiple document types from the list. The keywords fields available for searching on will appear below the Document Types listed in the left column. Many different options can be searching including date ranges of when the document was uploaded, all documents with certain Agency Number, or a specific Document Number or Type. An asterisk "*" can be used as a wildcard in searching.

The Document Retrieval interface will allow viewing of any document uploaded into the solution for the agency for which the user has permission. After search selections are made, click 'Find' and the Search Result will appear. Search results reflects the OnBase Document Type (Contract, Purchase Order, etc.), Agency Number, Division (always 000 for State Agencies), Document Number, Type, a (Y) if the document has been determined to be publicly viewable, and the Document Date or date of upload.

The screenshot shows the 'Search Results: 3 Document(s)' window. It contains a table with the following data:

Icon	Name	Type	Date
	DAS LB429 Contract - 060 - 000 - 43216 - 04 Public ()	DAS LB429 Contract	6/26/2014
	DAS LB429 Contract - 060 - 000 - 45194 - 04 Public (Y)	DAS LB429 Contract	6/26/2014
	DAS LB429 Contract - 060 - 000 - 60393 - 04 Public (Y)	DAS LB429 Contract	6/26/2014

Documents marked "Public ()" are not visible on the website while "Public (Y)" are visible.

Document Retrieval also provides Admin-level users with access to additional information:

STATE CONTRACTS DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

- DAS LB429 Contract Validity Reports
 - Validity Reports are generated weekly by the Solution reflecting system discrepancies. Agencies will need to correct these discrepancies in the report to be compliant with § 84-602.04. If no report is received, there are no discrepancies. The report reflects:
 - Data Records that have come into the system from E1 that have not been matched with a document uploaded into the DAS LB429 Solution.
 - Documents in an Agency's Hold Queue that have been uploaded to the system but have not been matched with a Data Record.
 - **NOTE:** The Validity Report is not designed to tell agencies what to upload; nor will it provide any information as to items not moving forward through the workflow queues. It is intended to alert an agency to discrepancies of items that have been uploaded.
 - Previous editions of the Report are searchable in Document Retrieval.
- DAS LB429 Data
 - These are the Data Records generated by E1 and imported into the Solution. They are searchable and useful for investigating why items are not matching.
- DAS LB429 SYS Doc – Agency Contact Form
 - These are the forms for Agency members who will receive the Weekly Validity Report.

EDITING A DOCUMENT INDEX

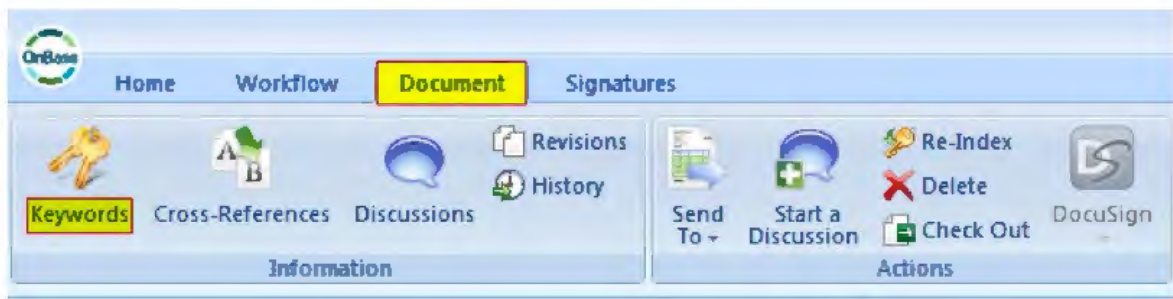
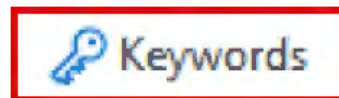
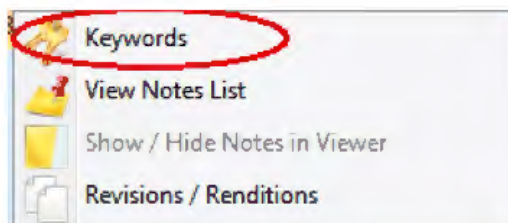
If a document is uploaded and indexed incorrectly, it will remain in the Hold Queue indefinitely. Agencies should always be aware of the items in the Workflow queues to ensure things are moving along in a timely manner. Items still in Workflow are not yet viewable on the public website. If documents are in the Hold Queue, it may take some research to determine why it is there. When checking a document in the Hold Queue, be sure to look closely at the details. The document number and type need to be **exactly** as the Data file does from E1. Watch for transposed numbers or the use of the number '0' instead of the letter 'O' in the document type.

Keywords can be edited by locating the document in either the Workflow or Document Retrieval interfaces, then:

1. Right-click the document or Click Document on the top of the screen
2. Select the option, Keywords:

STATE CONTRACTS DATABASE

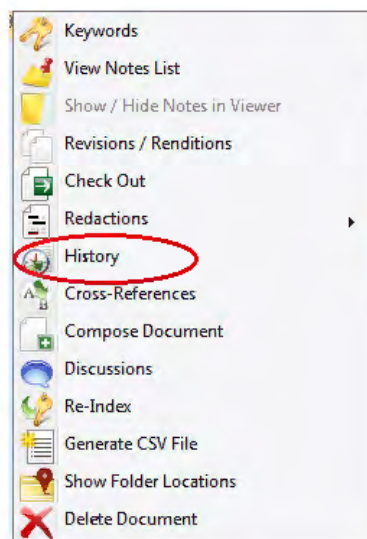
END-USER TRAINING AND ONBOARDING MANUAL



3. In the box that opens on the right side of the screen, make the necessary changes to the appropriate Keyword(s), and click 'Save Keywords' at the bottom to save changes.
4. Documents edited while they are in the Hold queue, will remain in the Hold queue if the changes are made after 11:00 am. The document will attempt to match to data again the next day at 11:00am.

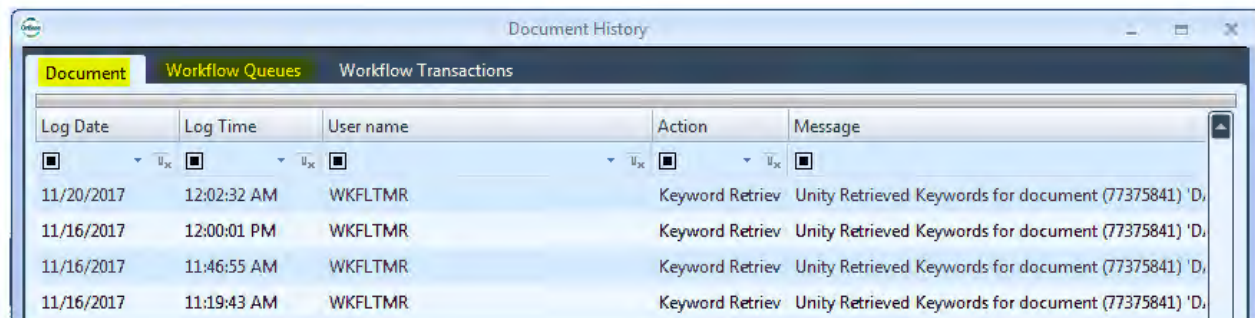
DOCUMENT HISTORY

Included in the right-click menu is the History function which allows a viewing of the log of all changes applied to a document, from creation to public access. The History window logs who, when, and what changes were applied for Keywords, Workflow Queues, and document views.



STATE CONTRACTS DATABASE

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Log Date	Log Time	User name	Action	Message
11/20/2017	12:02:32 AM	WKFLTMR	Keyword Retrieval	Unity Retrieved Keywords for document (77375841) 'D,
11/16/2017	12:00:01 PM	WKFLTMR	Keyword Retrieval	Unity Retrieved Keywords for document (77375841) 'D,
11/16/2017	11:46:55 AM	WKFLTMR	Keyword Retrieval	Unity Retrieved Keywords for document (77375841) 'D,
11/16/2017	11:19:43 AM	WKFLTMR	Keyword Retrieval	Unity Retrieved Keywords for document (77375841) 'D,

REMOVING PUBLIC ACCESS AND DELETING A DOCUMENT

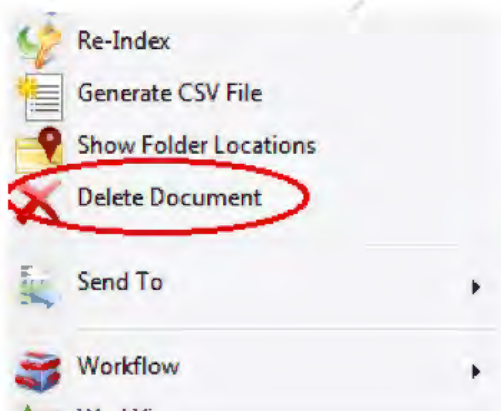
Should a document be erroneously uploaded by your Agency and become public, there are methods available for Admin-level users to remove it. There are several options to modify a document. It may be best to just upload a revision to the document, which has been redacted or processed correctly. If a document needs to be taken down immediately, the fastest course of action is to delete the document out of ECM OnBase entirely. To do this, access the Document Retrieval interface in OnBase:

1. Locate the document



Icon	Name	Type	Date
	DAS LB429 Contract - 060 - 000 - 43216 - O4 Public ()	DAS LB429 Contract	6/26/2014

2. Right-click the document
3. Select Delete Document



 Delete

4. Confirm selection

STATE CONTRACTS DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

The document is now immediately unavailable on the website. Be aware that this ability is reserved only for Admin-level users. This ability should be used sparingly and only in emergencies. With the delay built into the system from the Approval Queue, recently uploaded documents will only become publicly available after work hours, allowing for ample time to review documents thoroughly. If a document is deleted from ECM OnBase, its data record still appears on the website with the “Documents not available for immediate viewing” error message.

That data record, now without a matching document (if it was a one-for-one match) will return to the Data Records without Documents list in the Weekly Validity Report. A new document to match will need to be uploaded correctly, so the data record will be properly matched. If the data record itself is sensitive or confidential and should not be reported on the website, the only available option is to mark the document as Exempt from 84-602.04 in E1.

E1 provides an option in the document Header to exempt certain data from transferring into ECM OnBase. This option may be used for those documents that are sensitive or confidential and should not be included in the State Contracts Database website. Under the Category Codes tab, there is an entry for 84-602.02 EXEMPT (statute is now 84-602.04). If this field is marked with an “E” the data record will not transfer into ECM OnBase.

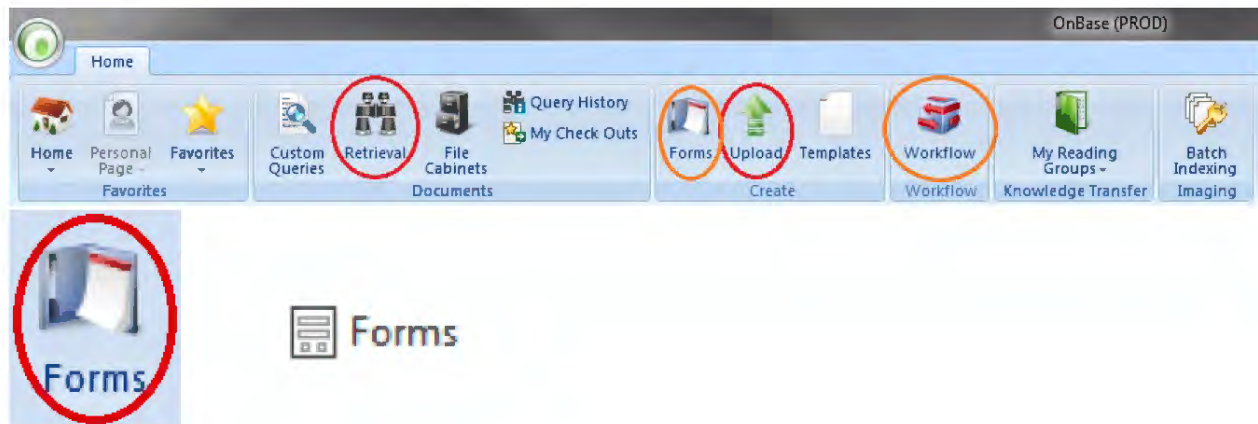
Order Header	Additional Properties	Category Codes
New/Renew	☐ N	NEW
Extension	☐	
Funding	☐	
Location Moved To	☐	
OCR	☐	
84-602.04 EXEMPT	☒ E	84-602.04 EXEMPT
73-101.01 PREF	☐	NO PREFERENCE

If there are questions or concerns about deleting a document, please email das.statecontracts@nebraska.gov.

STATE CONTRACTS DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

MANUAL UPLOAD PROCEDURES – FORMS



DAS LB429 SYS DOC – AGENCY CONTACT FORM

This form is used to change who receives the Weekly Contract Validity Report, which is generated by the ECM system automatically every Monday. The reports list the documents that have been uploaded that have no matching Data Records from E1, and the Data Records from E1 that have no matching uploaded documents. Multiple emails can receive the Validity Report.

Agency Contact Form:

Agency #:	065
Agency Name:	ADMINISTRATIVE SERV
Agency Contact	
Add	
Agency Contact Email:	DAS.STATECONTRACTS
Remove	
Submit	

To modify the form, use the Retrieval function to pull up your Agency's Contact Form. Click the Add button to add additional email addresses and click the Remove button to remove any email addresses. Click Submit to finalize the modifications. If you have any questions or concerns, or issues with receiving the Weekly Validity Report, contact das.statecontracts@nebraska.gov.

MANUAL UPLOAD PROCEDURES – WEB CLIENT

After a review of security procedures by the OCIO, it was determined that use of the Web Client for LB429 would not be feasible. It is recommended that all agencies use the ECM OnBase Unity Client. For agencies not using @Nebraska.gov email addresses or are not in the STN domain, the OCIO has options available to provide access to the DAS LB429 Solution.

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VALIDITY REPORT – CONVERT TO EXCEL DOCUMENT

Each week a Validity Report will be generated for each agency and emailed to their designated contact person. The Validity Report shows items with a discrepancy, data files with no matching document, and documents with no matching data file. The report is in a txt file, and when lengthy, can be better utilized in Excel format to be able to sort and filter.

All Validity Reports can be retrieved by an LB429 Admin. Utilizing the Retrieval function, select “DAS LB429 Contract Validity Report,” select your agency #, and select ‘Find.’ Find the most recent report. Open the report and copy data to be converted and paste into an Excel document. and right click and select “send to” and then select “file”. Change the file format to “native format” and click save.

Document 1 of 1:
DAS LB429 Contract Validity Report
DAS LB429 Contract Validity Report - 6/4/2018 - Agency 028

File Format of Attachment

Native Format
Send using the file's native format

Settings

Send All Pages
Send the entire document

Pages:

Note Options
None

File Name:
DAS LB429 Contract Validity ReportDAS LB42...

STATE CONTRACTS DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

UPDATING CONTACT INFORMATION TO RECEIVE VALIDITY REPORTS

To update contact information for Validity Reports open OnBase and select Retrieval at the top of your screen. From there navigate to **DAS LB429 SYS Doc – Agency Contact Unity Form**. From there you can search by Agency and Agency name.

Once you enter your agency number hit find at the bottom of your screen and select the Agency Contact Unity Form that pops up from there you can add and remove contacts. **Make sure to hit submit when you are finished to save changes.**

The screenshot shows the OnBase (01 Production) interface. The top navigation bar includes 'File', 'Home', and 'Document'. The 'Home' tab is active, displaying a ribbon with various icons for document management. The 'Document Retrieval' section is open, showing a search bar and a list of document types. The search results show one document selected: 'DAS LB429 SYS Doc - Agency Contact Unity Form - 2/26/2020'. The document details are displayed in a table below the search results.

Icon	Revision #	Name	Type	Date
		DAS LB429 SYS Doc - Agency Contact Unity Form - 2/26/2020	DAS LB429 SYS Doc - Agency Contact Unity Form	2/26/2020

Agency Contact Form:

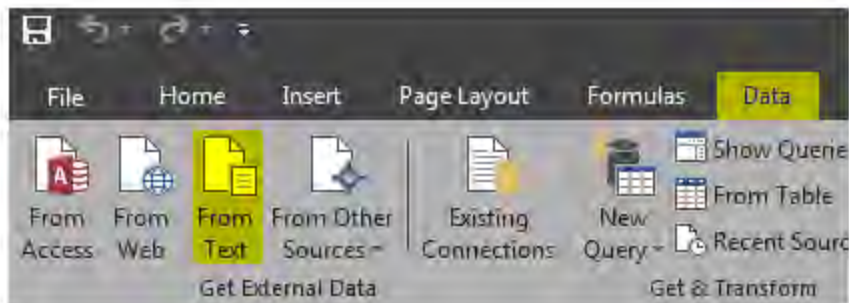
The screenshot shows the 'Agency Contact' form. It includes fields for 'Agency #' (013) and 'Agency Name' (DEPARTMENT OF EDUC). Below these fields is a table for 'Agency Contact Email' with three entries: DENISE.THEGE@NEBRAS, CATHY.CALLAWAY@NE, and STEVE.BAUERS@NEBRAS. Each entry has a 'Remove' button next to it. At the bottom of the form is a 'Submit' button.

Agency Contact Email:	
DENISE.THEGE@NEBRAS	Remove
CATHY.CALLAWAY@NE	Remove
STEVE.BAUERS@NEBRAS	Remove

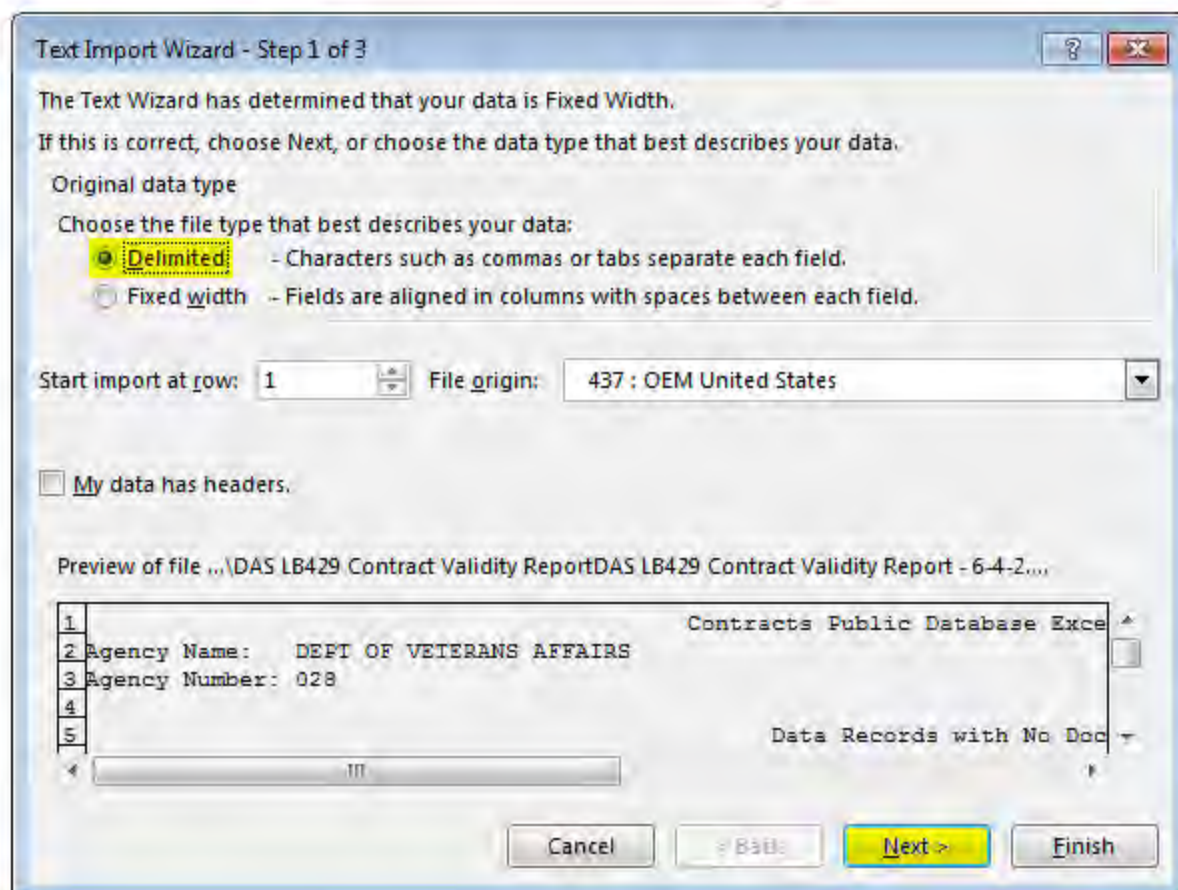
STATE CONTRACTS DATABASE

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The Validity Report is originally in a txt file. The file can either be opened or saved in this format. With Excel being opened to a new workbook; either click on the data tab then select “from text” and navigate to the txt file and select open; or copy data to the Excel workbook.



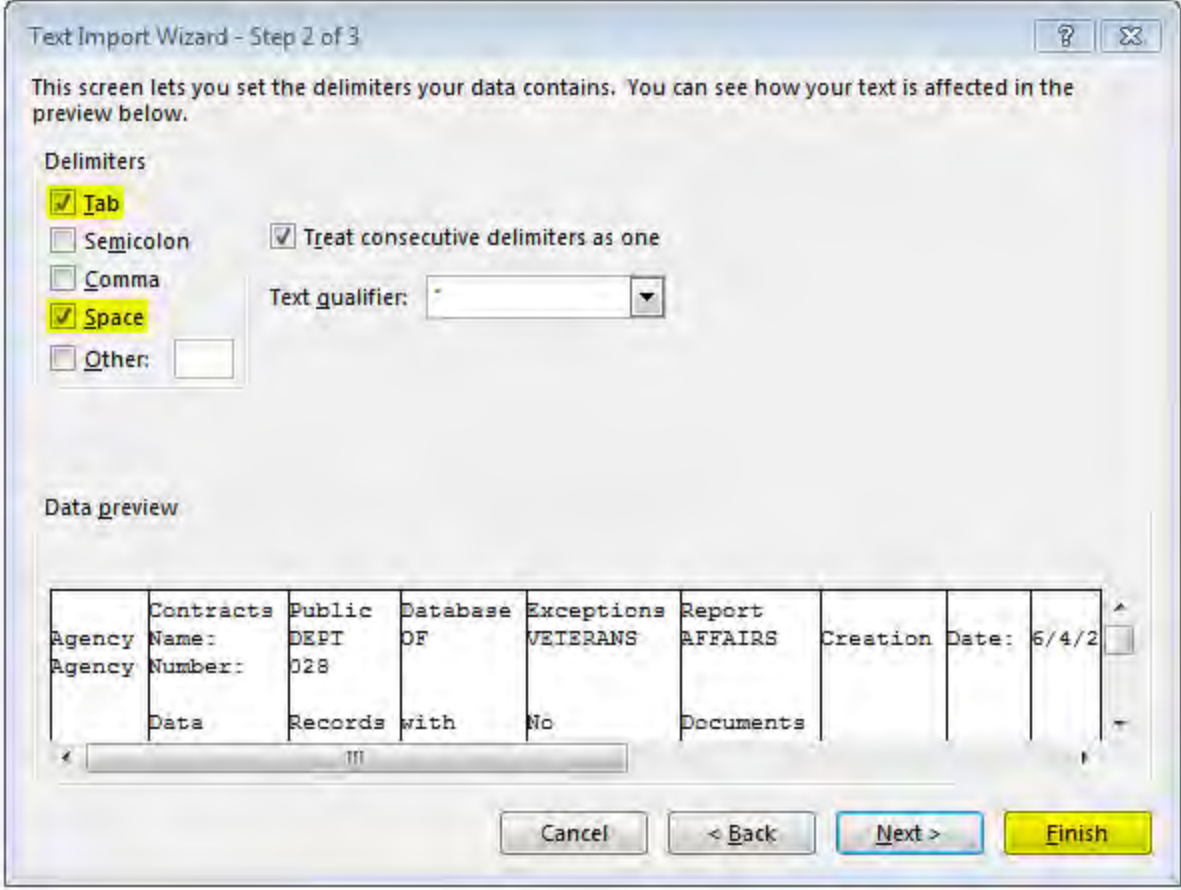
If opening from a saved location, a prompt box will open select delimited then click next. If using the paste function, chose Text to Column function on the Data tab and follow the same steps below.



STATE CONTRACTS DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

On the next prompt box select Tab (preselected) and Space. Then click Finish.



Text Import Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

☒ Tab
☐ Semicolon
☐ Comma
☒ Space
☐ Other:

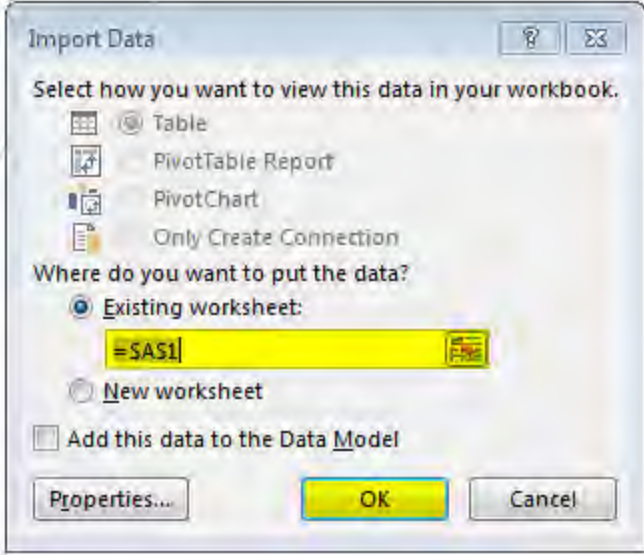
☒ Treat consecutive delimiters as one

Text qualifier:

Data preview

Agency Name:	Contracts Public Database Exceptions Report	Creation Date:	6/4/2
Agency Number:	DEPT OF VETERANS AFFAIRS		
	028		
Data Records with No Documents			

Buttons: Cancel, < Back, Next >, Finish



Import Data

Select how you want to view this data in your workbook.

☒ Table
☐ PivotTable Report
☐ PivotChart
☐ Only Create Connection

Where do you want to put the data?

☒ Existing worksheet:

☐ New worksheet

☐ Add this data to the Data Model

Buttons: Properties..., OK, Cancel

BULK UPLOADS – DOCUMENT IMPORT PROCESS (DIP) BY SECURE FILE TRANSFER PROTOCOL (SFTP)

In addition to uploading documents individually through the ECM OnBase Unity Client, there is a process for uploading large groups of documents at once, or for setting up an automated process to regularly bring documents into the system. Such method is more technical and detail-oriented and should only be used by agencies with a large number of documents to be uploaded on a regular basis. This DIP process utilizes Secure File Transfer Protocol (SFTP), a standard method of transferring documents. Access to the SFTP method of uploads is restricted more heavily than ECM OnBase use. Users will need to be in an extra Active Directory Security Group and have an account setup for the OCIO's SFTP Service, Go Anywhere.

Agencies participating in the SFTP method of upload will need to have an additional Active Directory Security Group created for access. This group needs to be created as the following:

- [Agency Acronym Identifier] LB429 Document Import
 - This group is only for SFTP access and is separate from the other Active Directory Security Groups

SFTP SETUP

The SFTP process is used to mass upload contracts/purchase orders to the LB429 ECM solution. This guide will help you walk through the steps for getting access to the SFTP server and how to perform a mass upload.

The first step is to create a Help Desk ticket through the [OCIO Service Portal](#).

Once logged in, select the Service Catalog portal:



Then navigate to the bottom of the page and select "OCIO SFTP Service"



Fill in the highlighted text fields.

OCIO SFTP Service

Description

Request a new SFTP user account

Instructions

Please fill out this form to request access to an SFTP share for a new user.

Request Form

Create Request On Behalf Of:

Choose One...



Please fill out this form to request access to an SFTP share for a new user

Agency (Required)

Job Code (Required)

Work Order (Required)

Type Of User (Required)

Existing Share Name Of SFTP Access Needed (Required)

PREVIOUS NEXT **SAVE** CANCEL FAVORITE

Put in your agency's name, the job code, work order number, the type of user (internal if on the STN domain), and the name of the existing share name ([\\stnecmnas01.stone.ne.gov\ECM_LB429_SHARE_v1\\$](#)). Once complete, click SAVE to submit the ticket. OCIO will manage the ticket and notify the user of its completion through normal processes. The OCIO will have established a folder for your agency to house the documents and Pointer file (described below) and an LB429 DIP timer for your agency.

For questions about this method of upload, please create a Help Desk ticket through the [OCIO Service Portal](#).

BULK UPLOAD PROCEDURES – SFTP UPLOADING PROCESS

Bulk SFTP Uploads are dependent upon two actions. 1) All of the documents to be uploaded need to be placed in the correct SFTP directory. 2) An index or pointer file will need to be prepared. The Pointer file provides the keyword information required to index the documents. These two actions combine in the DIP process to upload a large quantity of documents at once. When the background process is in place, and the SFTP access and DIP timer are all operational, your Agency is ready to begin with Bulk Uploads.

BULK UPLOAD PROCEDURES - ACCESS

1. Using a web browser, navigate to <https://transfer.nebraska.gov>. The login screen should look something like this:



GO ANYWHERE™
Web Client

User Name

Password

Login

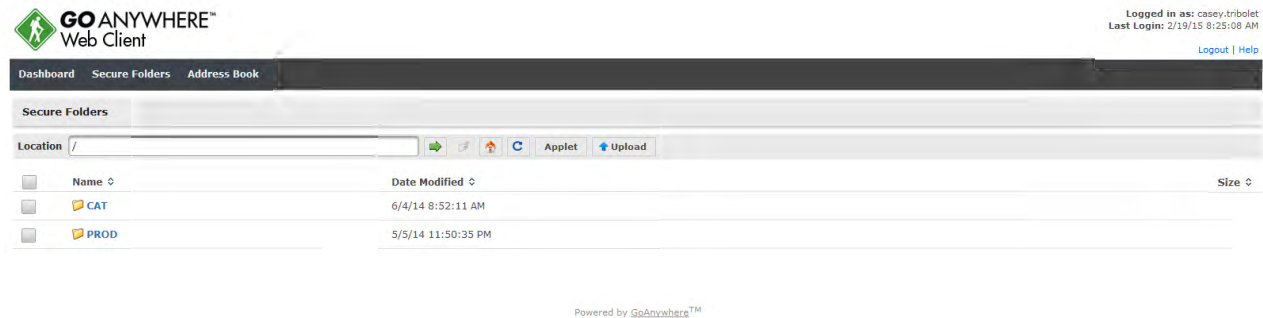
STATE OF NEBRASKA - OFFICE OF THE CIO

2. Enter the account information provided by the OCIO and click Login.
3. The file transfer windows (see below) should be viewable:

STATE CONTRACT DATABASE

END-USER TRAINING AND ONBOARDING MANUAL

SOLUTION ACCESS



4. Hosted files are located centrally on the page. Navigate to folders containing uploaded files using the linked folder names and the navigation buttons at the top of the local file pane.
 - a. CAT is the testing environment and not connected to the live database; use this to test when beginning to process Bulk Uploads. After a successful process is established, move to PROD.
 - b. PROD is the live environment connected to the live database and the E1 data records.
 - c. Both CAT and PROD will have a CONTRACTS folder inside them. This is the location all documents and the Index/Pointer file need to be uploaded to.

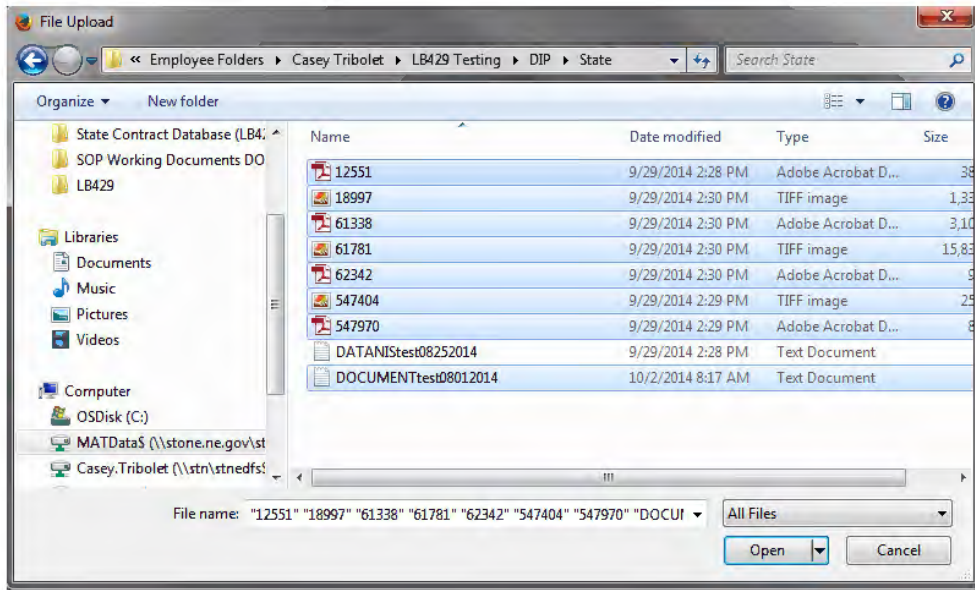


- d. Use the Green Arrow button to move back one level.
 - e. Use the Folder Up icon to quickly navigate up one level.
 - f. Use the Home icon to quickly navigate to your starting directory.
 - g. Use the Blue Circular Arrow to refresh the contents of a directory.
 - h. Use the Applet button to launch Go Anywhere in a separate window.
 - i. Use the Upload button to begin uploading your files.
5. Select files to upload by clicking on them once. Select multiple files by holding down the Shift key and dragging the mouse to the end of a group of files to select all files. Select non-adjacent files by holding down the Ctrl key and clicking once on each file.
6. To transfer files, simply select them in the File Explorer box and select Open.

STATE CONTRACT DATABASE

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SOLUTION ACCESS



7. Status of your transfers can be checked by clicking Show Details in the message box at the bottom of the screen.



AUTOMATED SCHEDULED BULK UPLOADS

The OCIO SFTP services can perform automated scheduled bulk uploads. This service comes at an additional cost as agencies will be billed time and materials at OCIO published rates for Open Systems support. If you have any questions about this functionality, please create a Help Desk ticket through the [OCIO Service Portal](#).

Now that the documents are uploaded to the SFTP directory, they are ready to be processed into ECM OnBase and indexed. Both operations are completed by adding an Index or Pointer File to your uploaded documents. This pointer file has very specific requirements and must be made carefully to avoid mistakes.

- | | | | | | | | | | | | |
|---|-----------------------|---------------|-----------------|--------------------|---------------|----------|---|---|---|---|---|
| | A | B | C | D | E | F | G | H | | | |
| 1 | On Base Document Type | Agency Number | Division | E1 Document Number | | | | | | | |
| | I | J | K | L | M | N | O | P | Q | R | S |
| | E1 Document Type | File Name | Approval Bypass | Redaction Bypass | Document Name | Revision | | | | | |

- pg. 33

END-USER TRAINING AND ONBOARDING MANUAL

- f. File Name: Free form (100 characters max.) Naming convention recommended.
- g. Approval Bypass: 'Y' to bypass the two approval queues; or 'N' to not bypass
- h. Redaction Bypass: 'Y' to bypass the redaction queue; or 'N' to not bypass
NOTE: Redaction cannot be done in ECM if uploading PDF's, only TIFF type documents
- i. Document Name: Exact file name of document to be imported into ECM OnBase, including file extension
- j. Revision: If you are uploading a revision to a document with this Bulk Upload, mark this field with a '1'

4. After completing the lines for each of your documents, expand the columns of pipes down the length of the spreadsheet to the last document line.
5. Delete header lines and anything in the lines beneath the entries. The document should look like this:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	DAS LB429 Contract	025	000		12345	04					DHHS Service Contract - S101	N		Y		DHHS S101.pdf			
2	DAS LB429 Contract	025	000		12346	04					DHHS Service Contract - S102	N		Y		DHHS S102.pdf			
3	DAS LB429 Contract	025	000		12347	04					DHHS Service Contract - S103	N		Y		DHHS S103.pdf			
4	DAS LB429 Contract	025	000		12348	04					DHHS Service Contract - S104	N		Y		DHHS S104.pdf			
5	DAS LB429 Contract	025	000		12349	04					DHHS Service Contract - S105	N		Y		DHHS S105.pdf			
6	DAS LB429 Purchase Order	025	000		12350	0P					DHHS Purchase Order - P99	Y		Y		DHHS P99.pdf			
7	DAS LB429 Purchase Order	025	000		12351	09					DHHS Purchase Order - P100	Y		Y		DHHS P100.pdf			
8	DAS LB429 Purchase Order	025	000		12352	2O					DHHS Purchase Order - P101	Y		Y		DHHS P101.pdf			
9	DAS LB429 Supporting Doc	025	000		12353	04					DHHS Service Contract - S101	Y		Y		DHHS S101 - A.tiff			1
10	DAS LB429 Supporting Doc	025	000		12354	04					DHHS Service Contract - S102	Y		Y		DHHS S102 - A.tiff			1

6. Save the Excel spreadsheet as a Text (Tab-delimited) file and give it the name DOCUMENT<Agency><Date>:

File name: DOCUMENTDHHS071614

Save as type: Text (Tab delimited)

a.

7. Open the document in Notepad. It will appear like this:

```

DAS LB429 Contract      025      000      12345      04      DHHS Service Contract - S101      N      Y      DHHS S101.pdf
DAS LB429 Contract      025      000      12346      04      DHHS Service Contract - S102      N      Y      DHHS S102.pdf
DAS LB429 Contract      025      000      12347      04      DHHS Service Contract - S103      N      Y      DHHS S103.pdf
DAS LB429 Contract      025      000      12348      04      DHHS Service Contract - S104      N      Y      DHHS S104.pdf
DAS LB429 Contract      025      000      12349      04      DHHS Service Contract - S105      N      Y      DHHS S105.pdf
DAS LB429 Purchase order 025      000      12350      0P      DHHS Purchase Order - P99      Y      Y      DHHS P99.pdf
DAS LB429 Purchase order 025      000      12351      09      DHHS Purchase Order - P100      Y      Y      DHHS P100.pdf
DAS LB429 Purchase order 025      000      12352      2O      DHHS Purchase Order - P101      Y      Y      DHHS P101.pdf
DAS LB429 Supporting doc 025      000      12353      04      DHHS Service Contract - S101      Y      Y      DHHS S101 - A.tiff
DAS LB429 Supporting doc 025      000      12354      04      DHHS Service Contract - S102      Y      Y      DHHS S102 - A.tiff

```

8. Select one of the blank spaces, and press Ctrl + C to copy the space

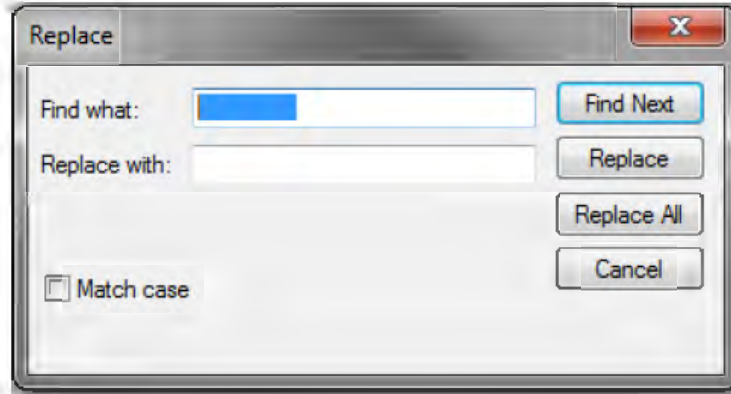
File Edit Format View Help

a. DAS LB429 Contract 025

END-USER TRAINING AND ONBOARDING MANUAL

9. Under Edit, select Replace... (Ctrl + H)

10. Paste (Ctrl + V) the blank space into the top field of the Replace box.



a.

b. Leave the lower field untouched and chose Replace All.

11. Your document will condense and will appear like this:

```
DAS LB429 Contract|025|000|12345|04|DHHS Service Contract - S101|N|Y|DHHS S101.pdf|
DAS LB429 Contract|025|000|12346|04|DHHS Service Contract - S102|N|Y|DHHS S102.pdf|
DAS LB429 Contract|025|000|12347|04|DHHS Service Contract - S103|N|Y|DHHS S103.pdf|
DAS LB429 Contract|025|000|12348|04|DHHS Service Contract - S104|N|Y|DHHS S104.pdf|
DAS LB429 Contract|025|000|12349|04|DHHS Service Contract - S105|N|Y|DHHS S105.pdf|
DAS LB429 Purchase Order|025|000|12350|0P|DHHS Purchase Order - P99|Y|Y|DHHS P99.pdf|
DAS LB429 Purchase Order|025|000|12351|09|DHHS Purchase Order - P100|Y|Y|DHHS P100.pdf|
DAS LB429 Purchase Order|025|000|12352|Z0|DHHS Purchase Order - P101|Y|Y|DHHS P101.pdf|
DAS LB429 Supporting Doc|025|000|12353|04|DHHS Service Contract - S101|Y|Y|DHHS S101 - A.tiff|1
DAS LB429 Supporting Doc|025|000|12354|04|DHHS Service Contract - S102|Y|Y|DHHS S102 - A.tiff|1
```

12. Save your changes to the document in Notepad and upload the pointer alongside your files in the SFTP directory.

Once your Index/Pointer file is uploaded to the SFTP directory, the ECM OnBase system will detect that it is available. At the top of the next hour your DIP timer will run and process your files into the system. A few minutes after the DIP timer runs check your SFTP directory again. (The amount of time may vary based on the size of your Bulk Upload) Your Index file should no longer be in the CONTRACTS directory. If your Index file was unsuccessful, there will be a new folder in your directory named ERROR_FILES. If your Index file was moved into this new folder, please review the file for errors in formatting, and contact das.statecontracts@nebraska.gov if you require any assistance in determining why the upload failed.

SOLUTION OVERVIEW

LB429 introduced and signed into law by Governor Heineman in June 2013, tasked the Department of Administrative Services (DAS) with creating a database of all active and expired contracts with the State of Nebraska that constitute an expenditure of state funds. That database was required to be searchable by Vendor, Agency, Board, Commission, or Department, and by Dollar Amount. It was statutorily required to go live to the public on July 1, 2014.

The solution has three parts – contract data, which is which is fed on a nightly basis from the State’s financial system of record, E1 over the ECM/Hyland OnBase; documents, which are uploaded by the end-users at the Agency-level into ECM/Hyland Base; and the publicly searchable State Contracts Database website (<http://statecontracts.nebraska.gov>). All changes to existing documents and new documents in E1 that meet the statute criteria are included in the data transfer. The University of Nebraska and Nebraska State Colleges, both included in the Database, also feed in their data from their own financial databases. The contract data is ‘married’ or matched up to uploaded documents uploaded. Once married, these document-and-data sets are made publicly searchable on the State Contracts Database website.

The document upload process relies on the use of keywords attached to the documents which provide the necessary information to match with data records. In addition to requiring the proper keywords, the documents in the solution may utilize the Redaction and a two-step Approval processes to ensure that all sensitive information from these contracts is dealt with appropriately. Once uploaded, redacted, and approved, the documents will marry with their data, and become public. Data is made public on the website 24 hours after it is generated in E1. Documents which marry data, are made available later the same day.

On the State Contracts Database website, public users can search through active or expired documents, documents of a specific Agency, Board, Commission, or Department of the State of Nebraska or a specific Campus of the University of Nebraska and Nebraska State Colleges. Users can also search by Vendor Name and Dollar Amount or by a specific contract number, if known. Initial search results on the website are fed by data records that match the desired search criteria. Selecting any of the initial results will provide users with the documents married to that specific record for viewing or download.

SOLUTION ACCESS – ECM ONBASE UNITY CLIENT

The DAS LB429 solution is completely built inside the ECM (Electronic Content Management) system, provided by the OCIO. Agency users will access the system by way of the OnBase software, and we recommend the Unity Client as the most user-friendly interface of OnBase.

Hardware	Minimum	Recommended
CPU	1.6 Ghz	2.4 Ghz
Memory (RAM)	2 GB	4 GB (4+ for scanning)
Free Hard Disk Space	200 MB	
Screen Resolution	1024x768 (1280x800 widescreen)*	1280x1024 (1440x990 widescreen)
Operating System	Windows Vista	Windows 7 SP1 64-bit
Graphics Card	128 MB	256 MB with hardware acceleration support
Web Browser	IE 9.0, 10.0, 11.0	Windows Vista: IE 9.0 Windows 7: IE 9/10 Windows 8: IE 10 Windows 8.1: IE 11
Email	Outlook, Lotus Notes, Novell	Outlook (State Recommendation)
Media Player	Windows Media Player 10	

If installation of the OnBase Unity Client is required, please follow your agency's standard processes for workstation software installation. If the OCIO handles your software deployment, please submit a ticket as you would for any other software deployment request.

Users who do not use @Nebraska.gov email addresses will need to reach out to the State Contract Database Help Desk at das.statecontracts@nebraska.gov or the OCIO Help Desk by submitting a Help Desk ticket through the [OCIO Service Portal](#) to discuss options for accessing the DAS LB429 Solution.