# OnBase Info Session

https://www.onbase16.gvsu.edu/AppNet/Login.aspx

OnBase 16 has a new URL location make sure you update your shortcuts if you have made them

https://www.onbase16.gvsu.edu/AppNet/Login.aspx


GRAND VALLEY
STATE UNIVERSITY
ACCOUNTS PAYABLE
PAYROLL
STUDENT ACCOUNTS
HUMAN RESOURCES
ADMISSIONS
UNIVERSITY DEVELOPMENT
FINANCIAL AID
DISABILITY RESOURCES
PROCUREMENT SERVICES
RECORDS
ACCOUNTING
One platform
Unlimited potential
OnBase
by Hyland

Reasons to love OnBase16:

- Control who and how many people in your department receive notifications.
- All documents are approved the same way.
- Runs on all platforms and major web browsers.

# Document Type Changes

## OnBase 14

- AP Check Request
- AP Daily Cash Report
- AP Invoice/Facilities/Facilities Planning
- AP Transfer Request
- AP Check Request Attachment
- AP Daily Cash Report Attachment
- AP Transfer Request Attachment

## OnBase 16

- AP Department Check Request
- AP Department Deposit
- AP Unity Invoice
- AP Department Transfer Request
- AP Department Voucher
- AP Attachment
- AP Department Profile

# Workflow Changes

## OnBase 14

- AP Invoice Approval
- AP Daily Cash Reports
- AP Transfer Request

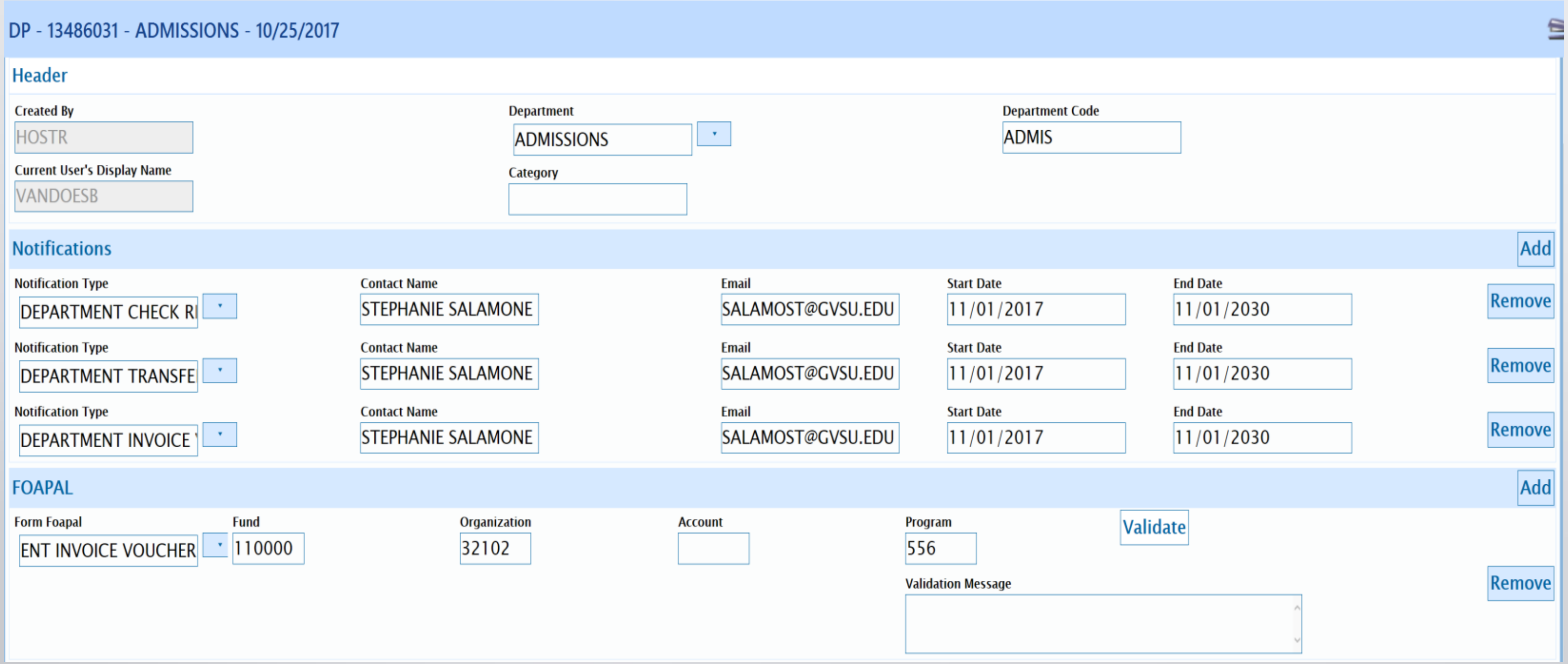
## OnBase 16

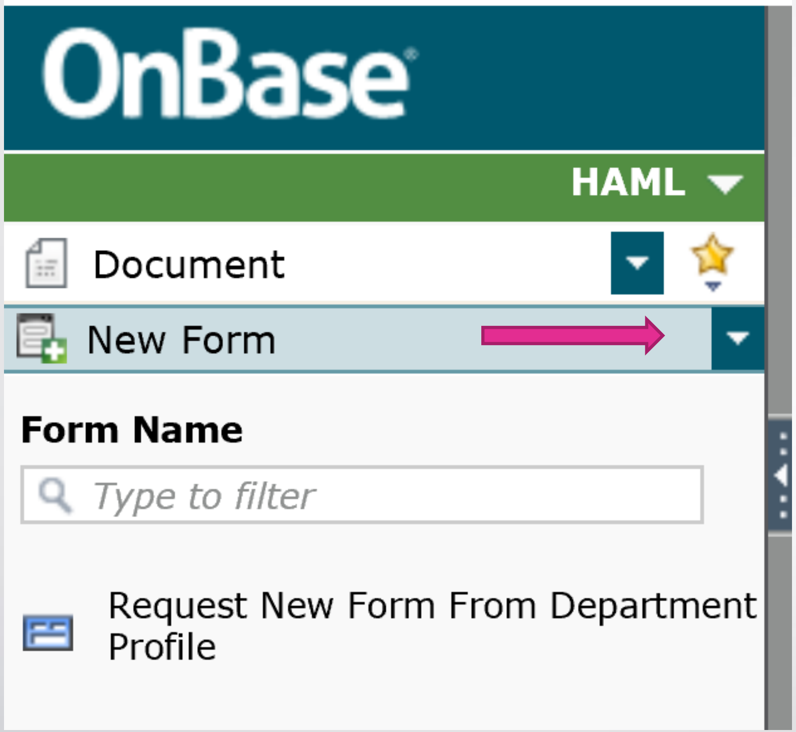
- AP Form Completion
- AP Approval

# Department Profile

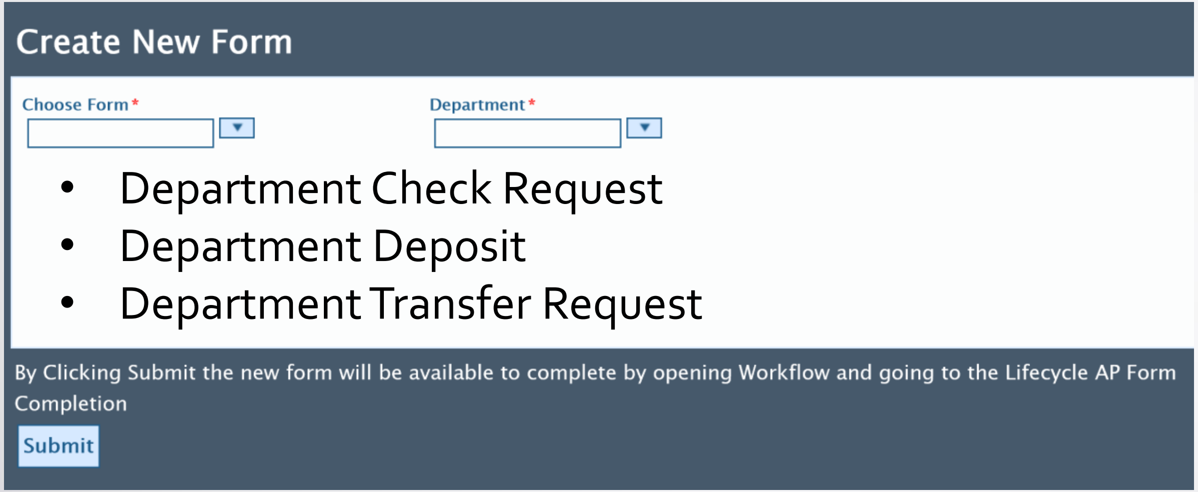
- The Department Profile allows each department the ability to control who receives an email when there is work to complete in the Form Completion Life Cycle
- Each type of document can have different email notifications assigned to them
- Each department can decide how many people receive the email notification
- Each department can change the email notifications when they need to

# Department Profile






To create a Department Deposit, Department Check Request or Department Transfer Request you start at the home menu and click on the second drop down arrow and select the option New Form. Select Request New Form from Department Profile.



## Create New Form

Choose Form*

Department*

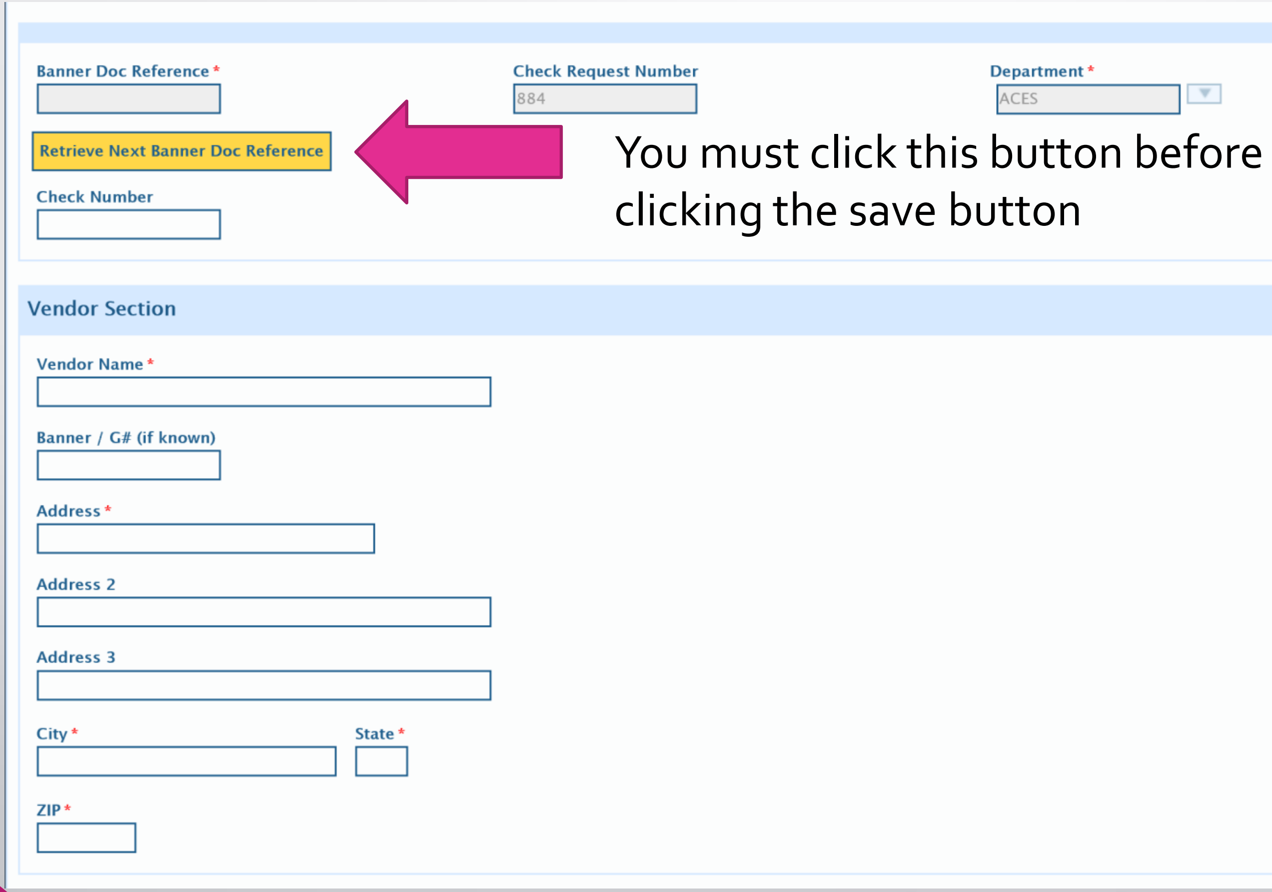
- Department Check Request
- Department Deposit
- Department Transfer Request

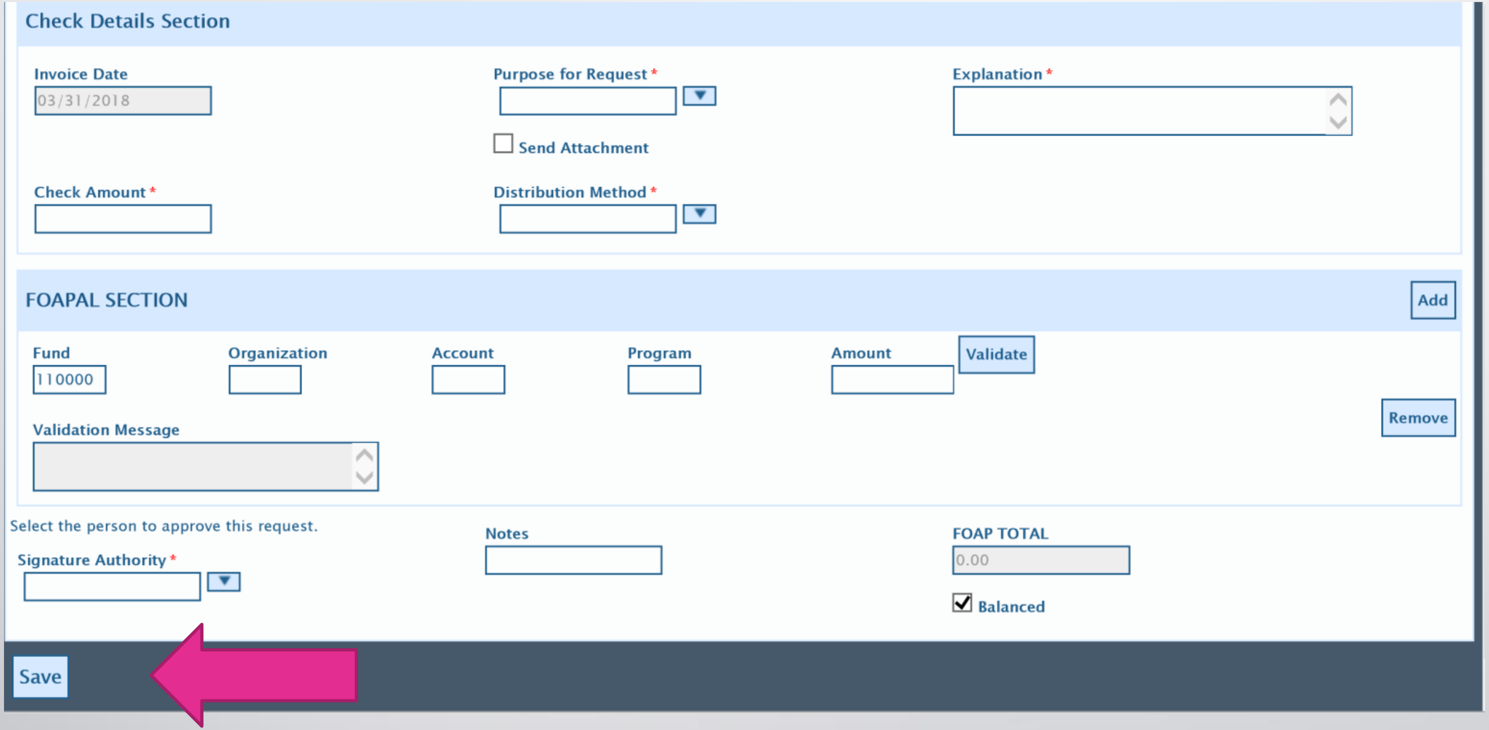
By Clicking Submit the new form will be available to complete by opening Workflow and going to the Lifecycle AP Form Completion

Submit

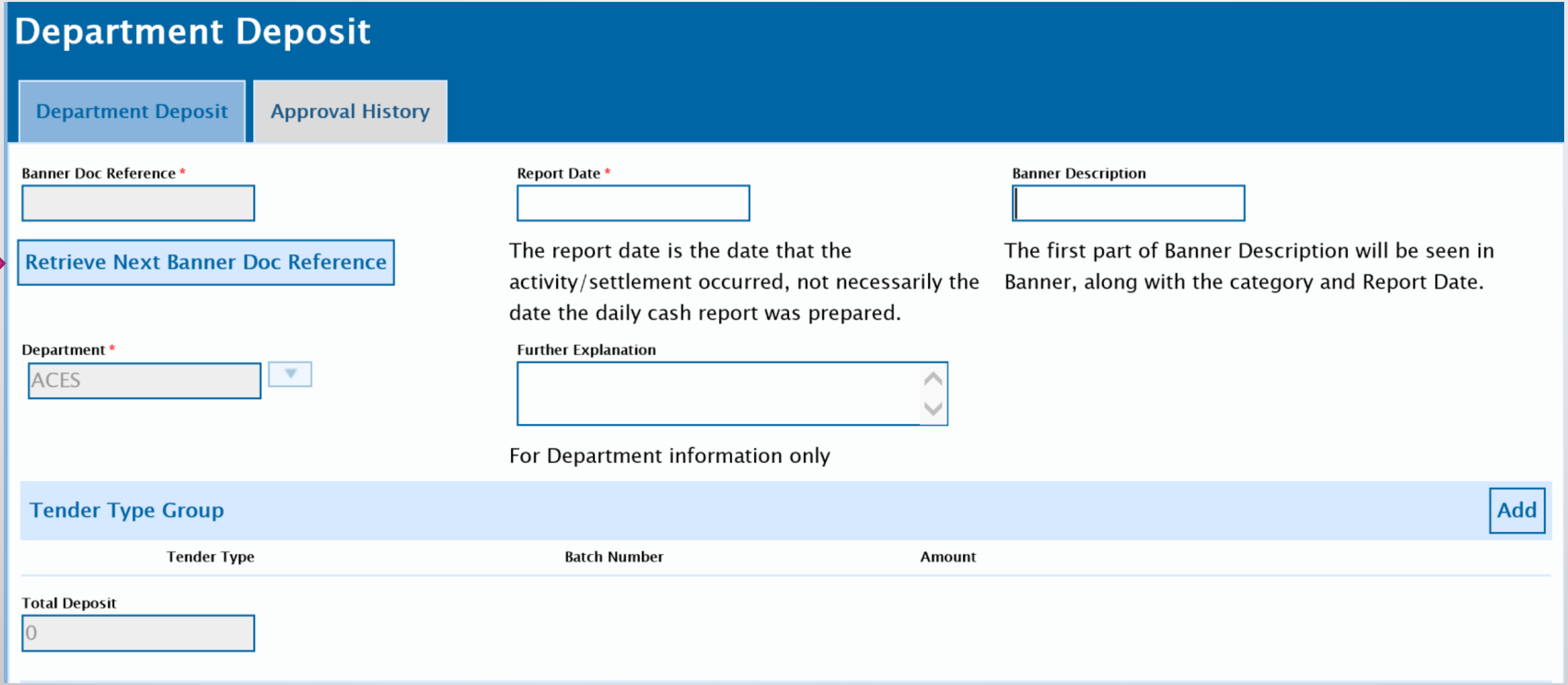
- From the Choose Form drop down box select the form you wish to create.
- Click the Department drop down box to select your department name.
- Remember that there is a help document on the Business and Finance OnBase Resources page to search for your department name based on a FOAP.

To create a Department Check Request fill in all of the fields marked with a red asterisk.



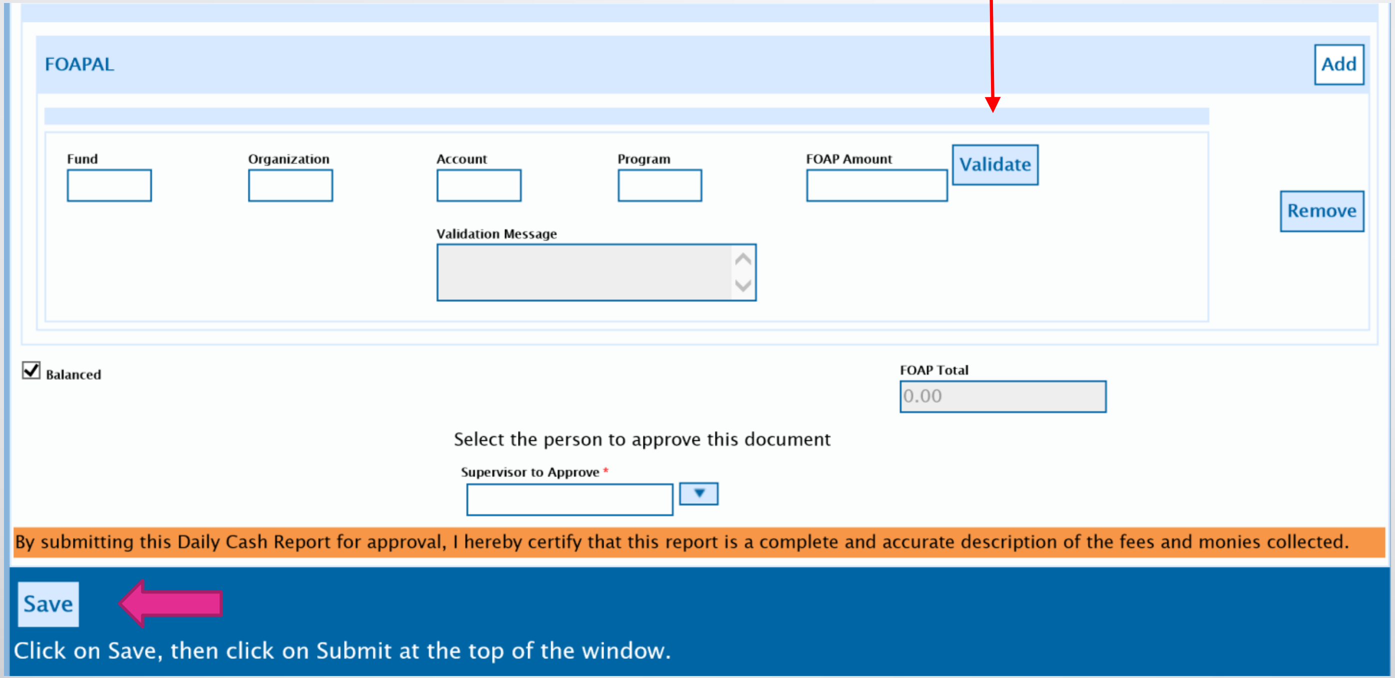



On each form that you work on you must click the save button before you can click a Task Button



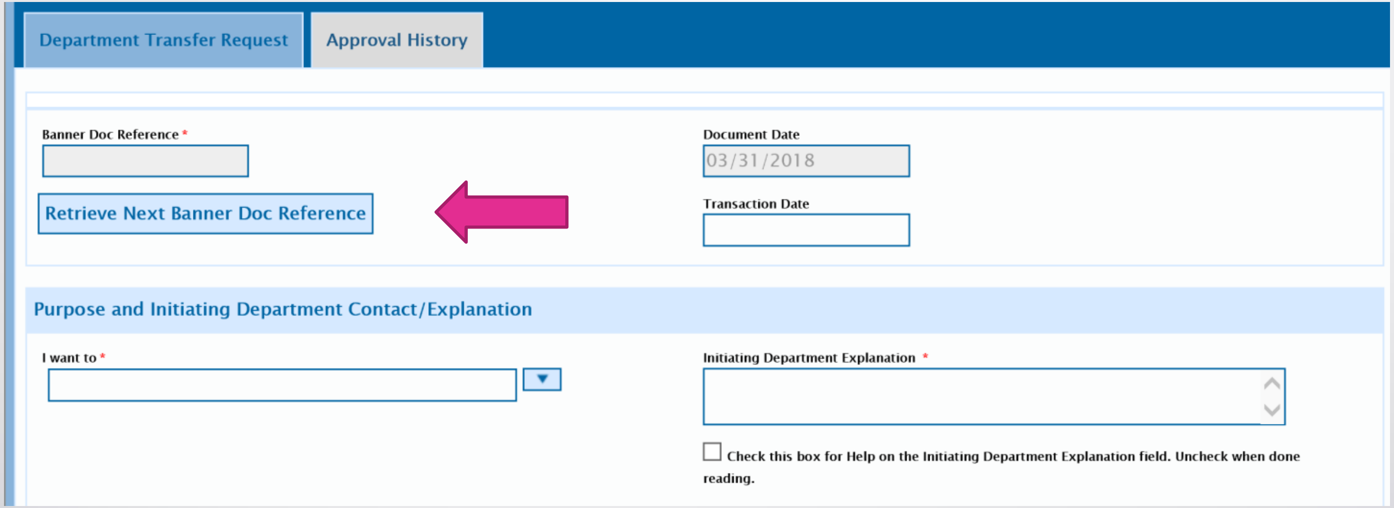

Make sure you complete all of the fields marked with a red asterisk.

Want to make sure that you filled in a valid FOAP? Click the validate button.

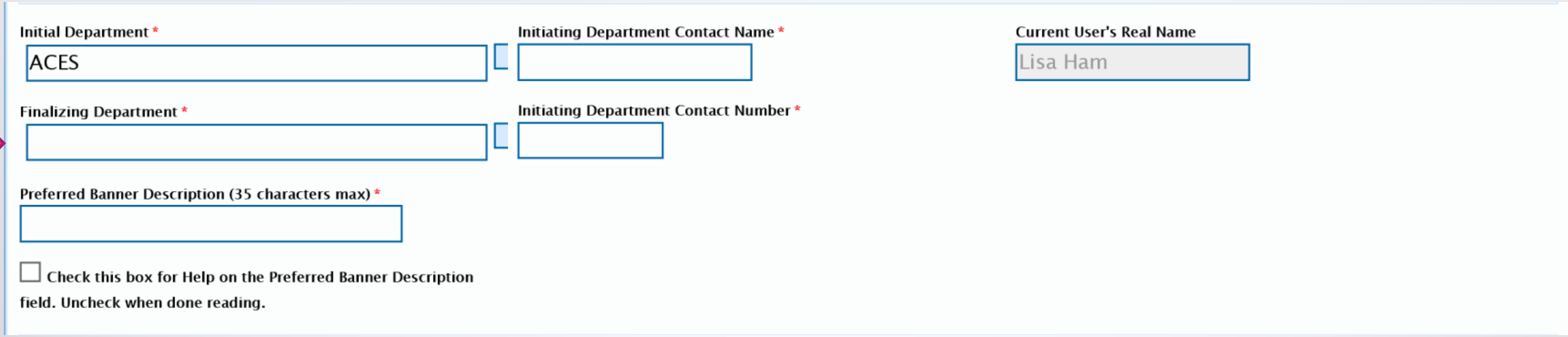



On each form that you work on you must click the save button before you can click a Task Button

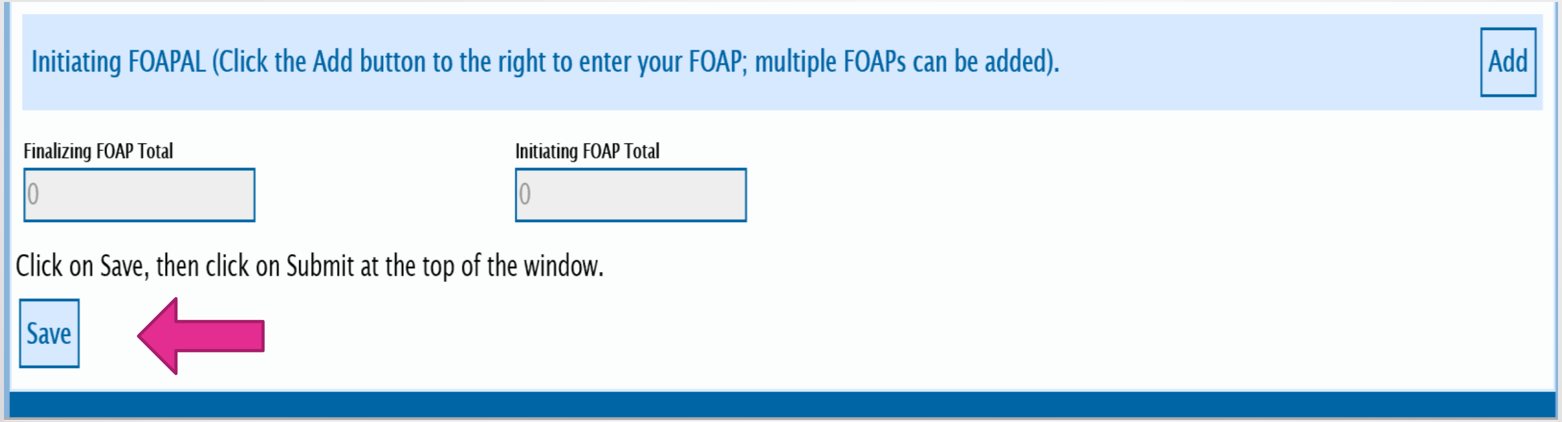
The transfer request has boxes that you can check to receive instructions or explanations for the required values.




Make sure you complete all of the fields marked with a red asterisk.

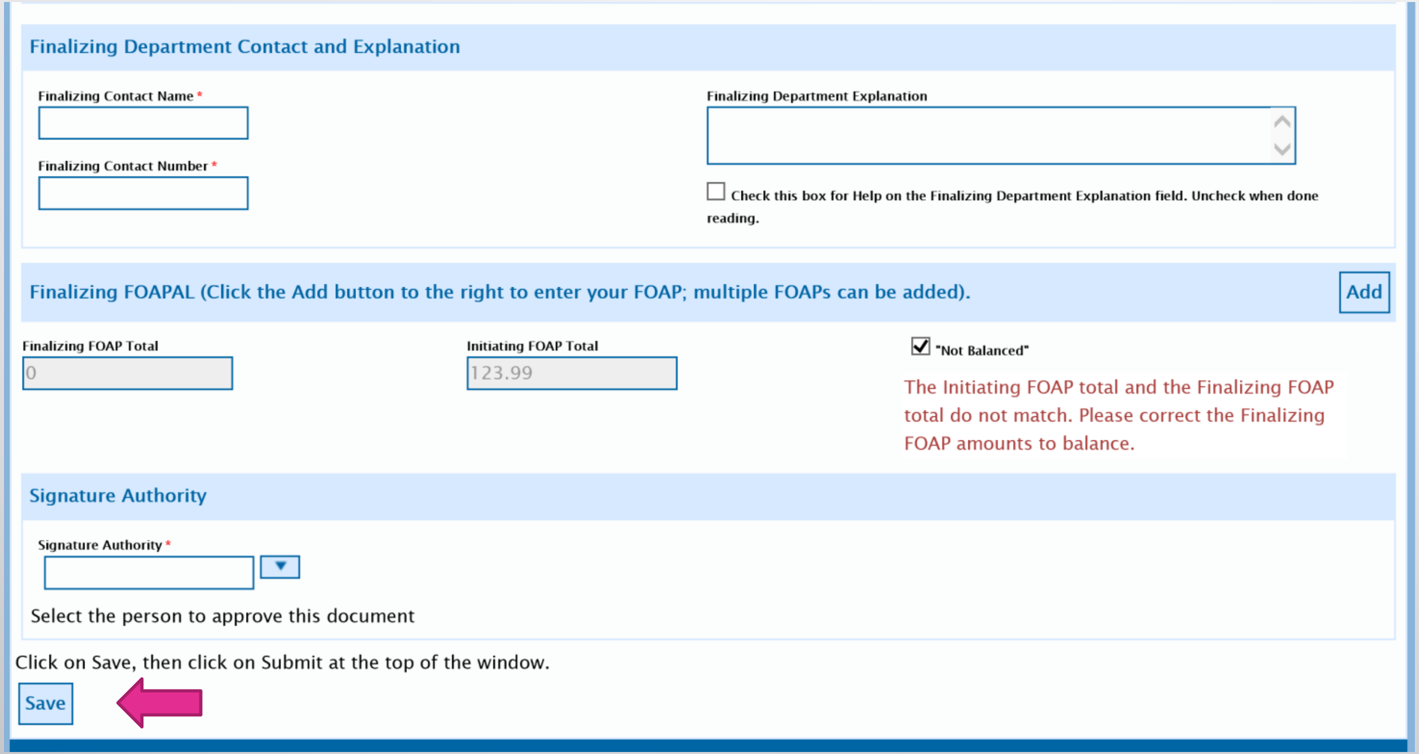



- Select the finalizing department from the drop down list
- If the department is going to be the same choose your department again from the drop down list




On each form that you work on you must click the save button before you can click a Task Button

The Finalizing(receiving) Department will have to finish completing form with their information before it can go to the appropriate department for approval.



Finalizing Department Contact and Explanation

Finalizing Contact Name *

Finalizing Contact Number *

Finalizing Department Explanation

Check this box for Help on the Finalizing Department Explanation field. Uncheck when done reading.

Finalizing FOAPAL (Click the Add button to the right to enter your FOAP; multiple FOAPs can be added).

Add

Finalizing FOAP Total

0

Initiating FOAP Total

123.99

"Not Balanced"

The Initiating FOAP total and the Finalizing FOAP total do not match. Please correct the Finalizing FOAP amounts to balance.

Signature Authority

Signature Authority *

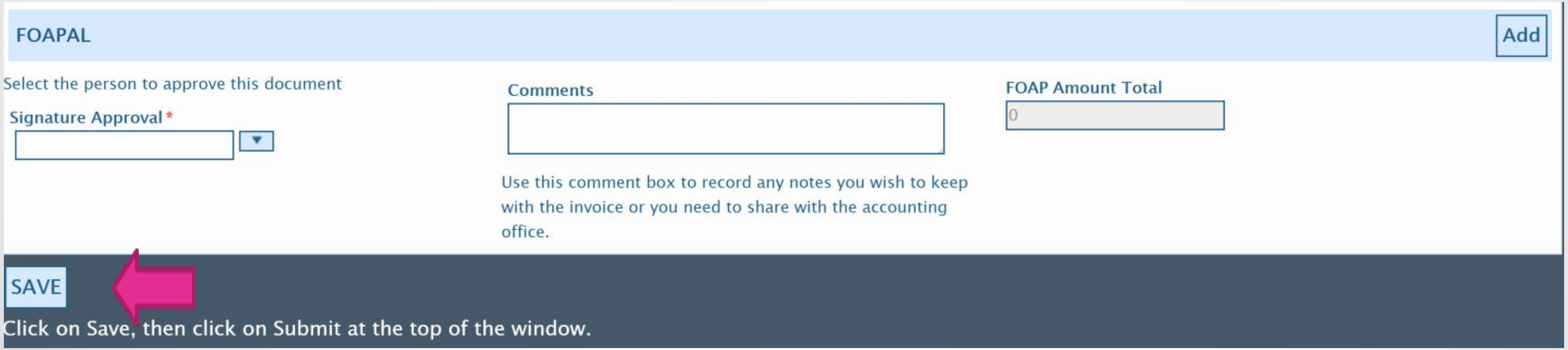
Select the person to approve this document

Click on Save, then click on Submit at the top of the window.

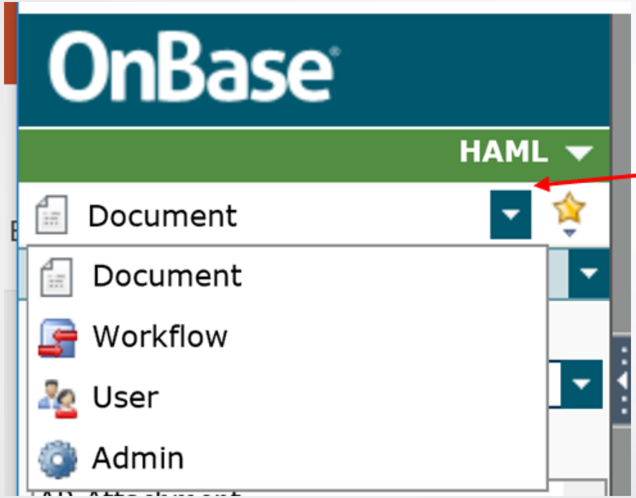
Save

The Finalizing Department will need to click Save when they are done with their required information.


- Invoice processing is completed with department voucher instead of an AP Email Eform.
- Email notifications will only come one time a day and there will not be a link on the email to OnBase.
- Invoice approval is based on the department’s share of an invoice total.
- Use the work folder to review the related Unity Invoice to see the image of the invoice.



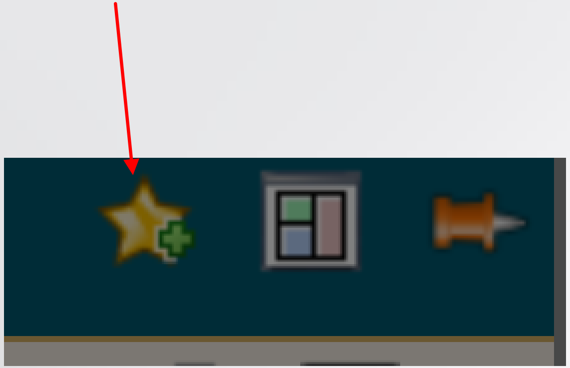

- Click the Add button on the FOAPAL header section of the voucher
- Enter the FOAP used to pay the invoice
- Click the Add button on the FOAPAL header section of the voucher to add more foap's.
- The FOAP Amount Total must equal the Department Share of the invoice in order to save the voucher
- Click the drop down list by the Signature Approval box to choose who will be responsible for approval of the invoice.
- If you wish to add notes or comments enter them in the comments box
- Click the SAVE button to save the information on the voucher.



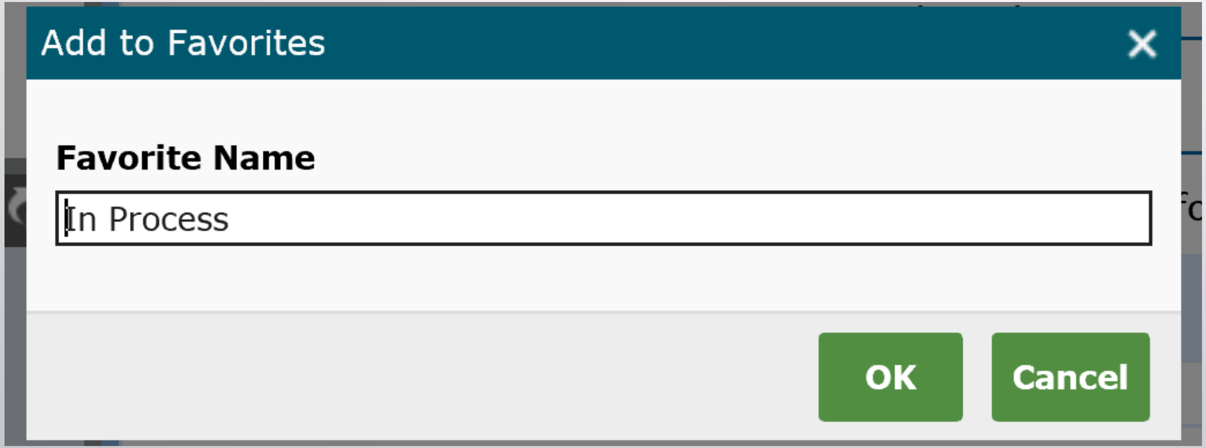

To start workflow, click the drop down indicated by the red arrow and select workflow.

Or, if you have set up favorites you can click on the Star Icon.

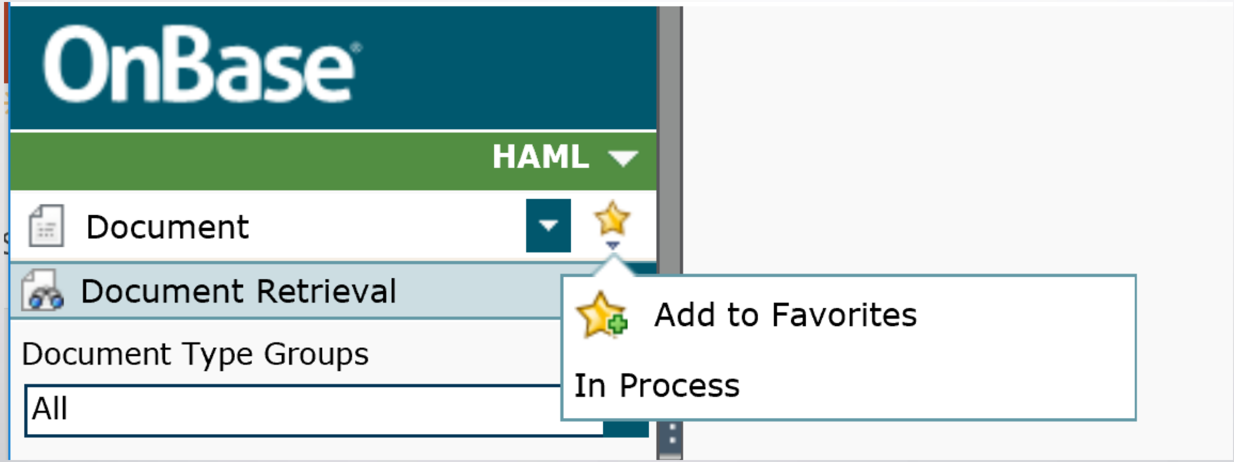
https://www.onbase16.gvsu.edu/AppNet/Login.aspx

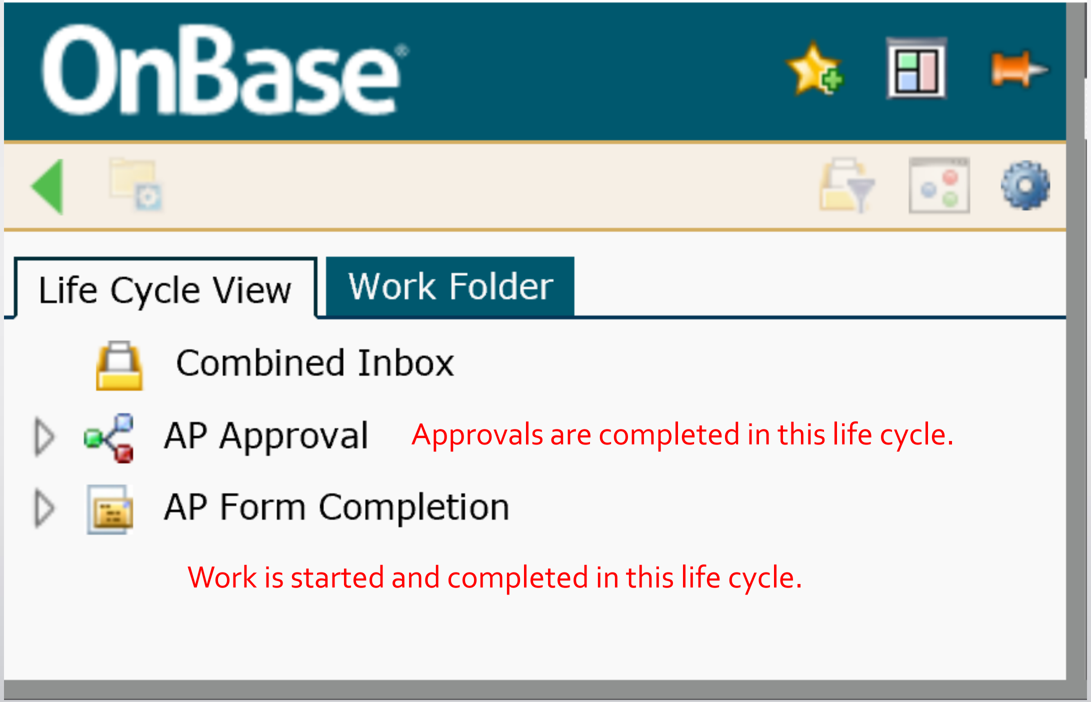


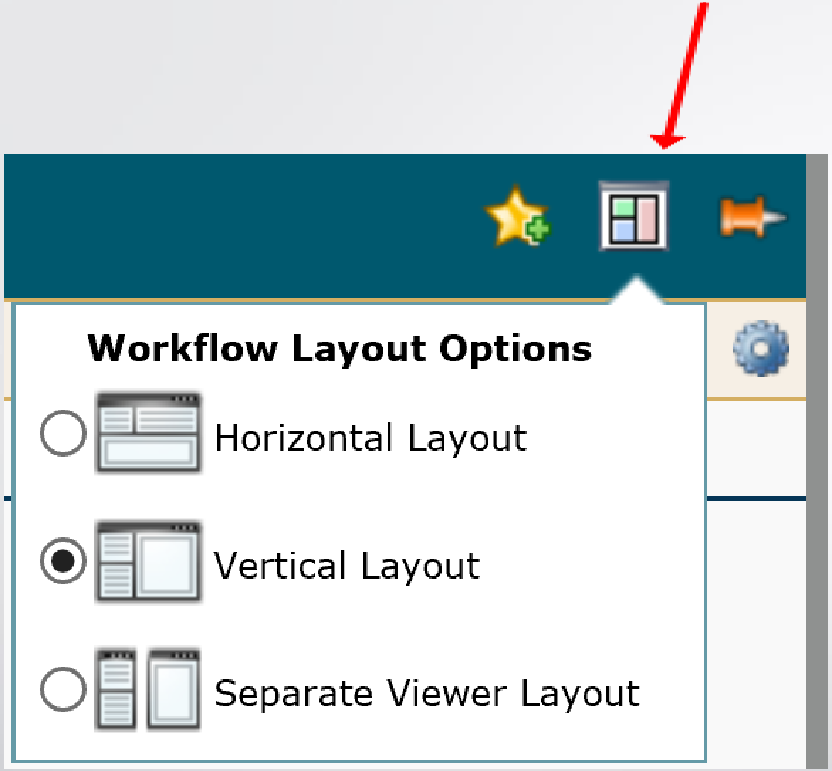
To mark a folder as a favorite, click the star when on the folder and it will show under your favorites. The favorites option is found on the first screen where you do document retrieval.



- If you add a folder to your favorites you can access it from the home menu.
- Click the star Icon and the folders you marked as favorites will display.
- Click the link to go directly to that folder.




OnBase
Life Cycle View
Work Folder
Combined Inbox
AP Approval
Approvals are completed in this life cycle.
AP Form Completion
Work is started and completed in this life cycle.

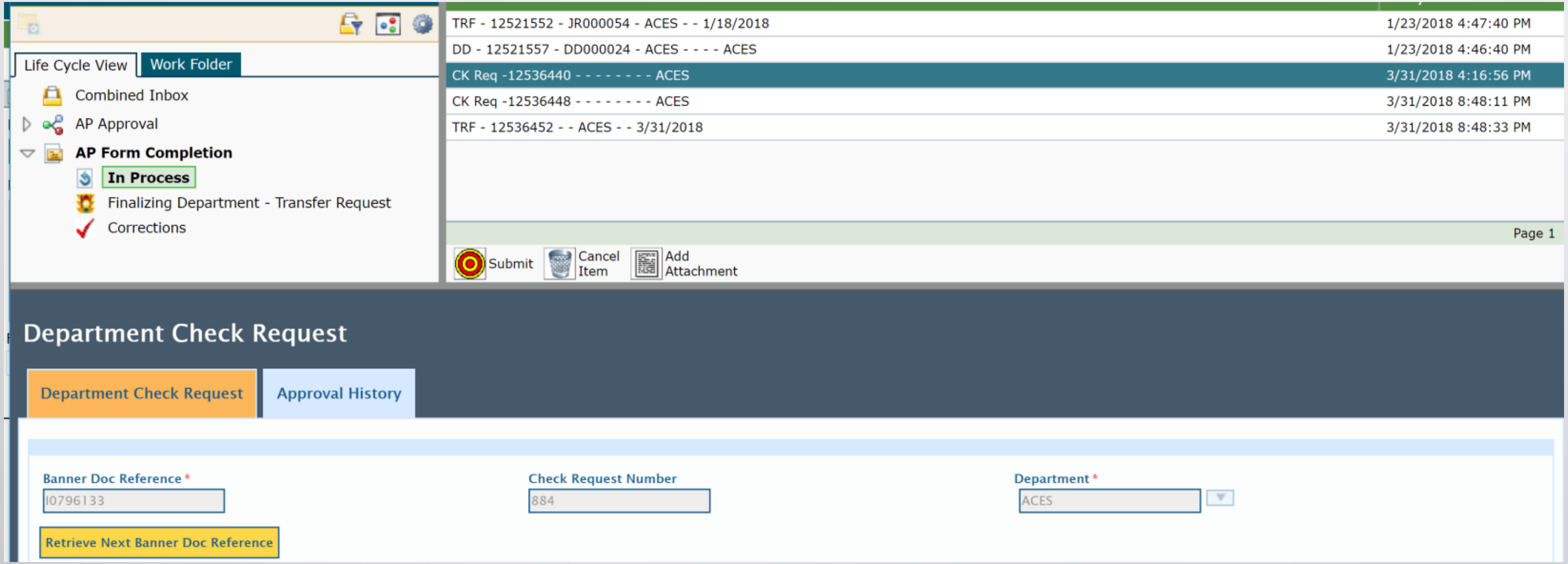



Horizontal layout is the traditional view that was standard in OnBase 14

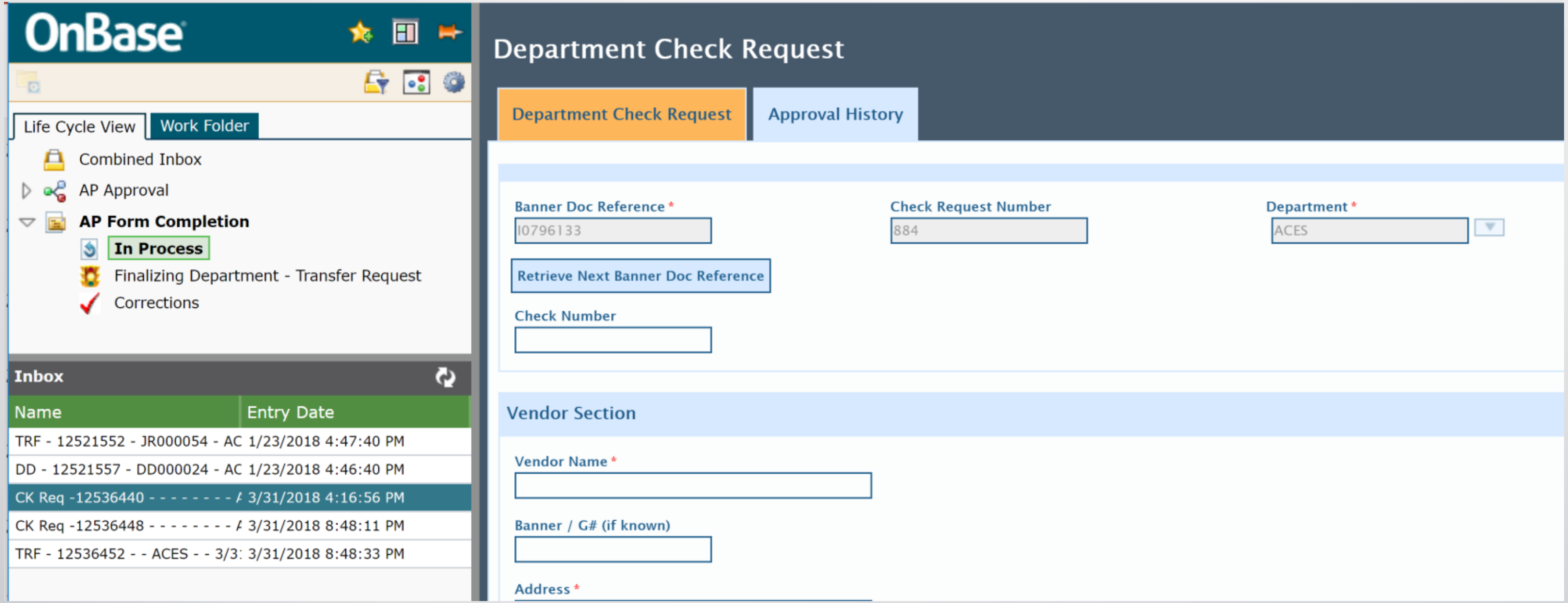
Vertical layout moves the inbox below the lifecycle view and shows the document on the right full height of your screen

If you have 2 screens you can use both of them with this option

# Horizontal Layout



# Vertical Layout

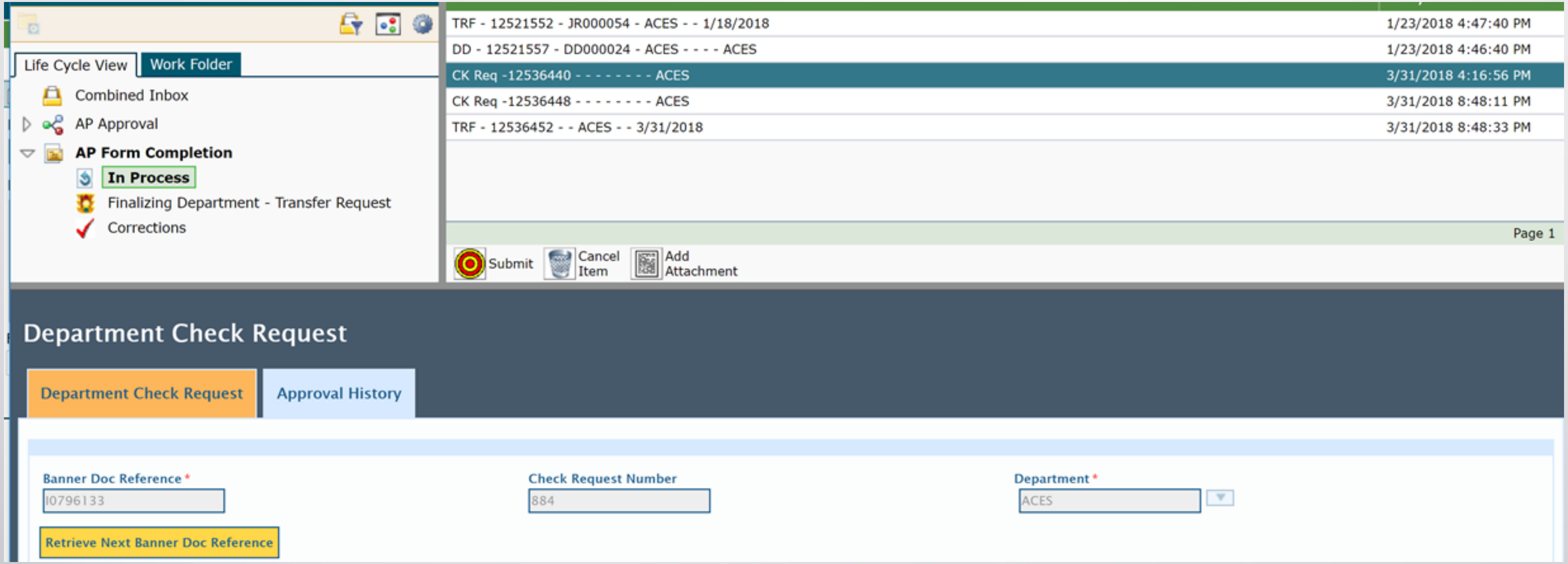


Workflow Settings – this allows you to combine forms from multiple folders into one inbox

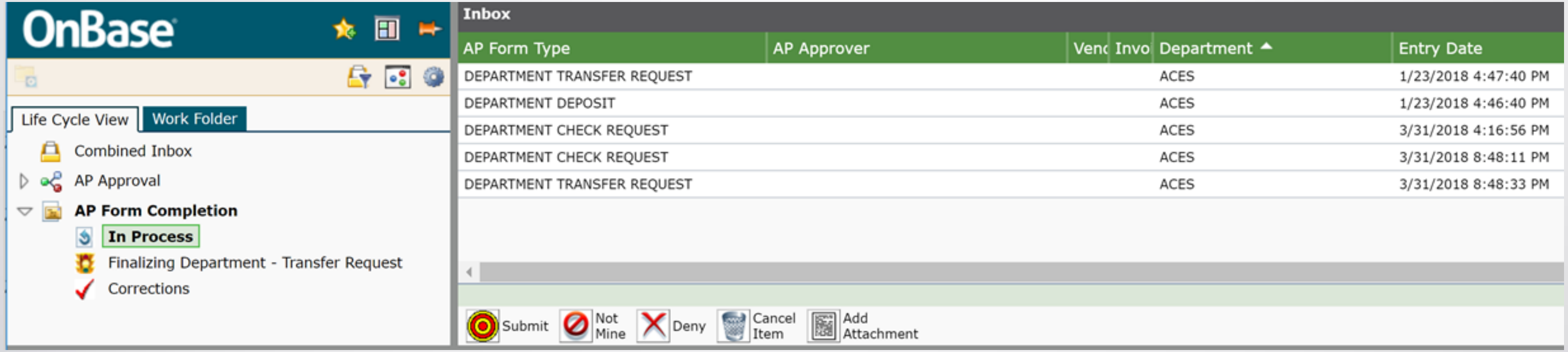
Apply Filter- This allows the user to search or restrict what they see in their inbox

Process Flow- we do not use this option currently

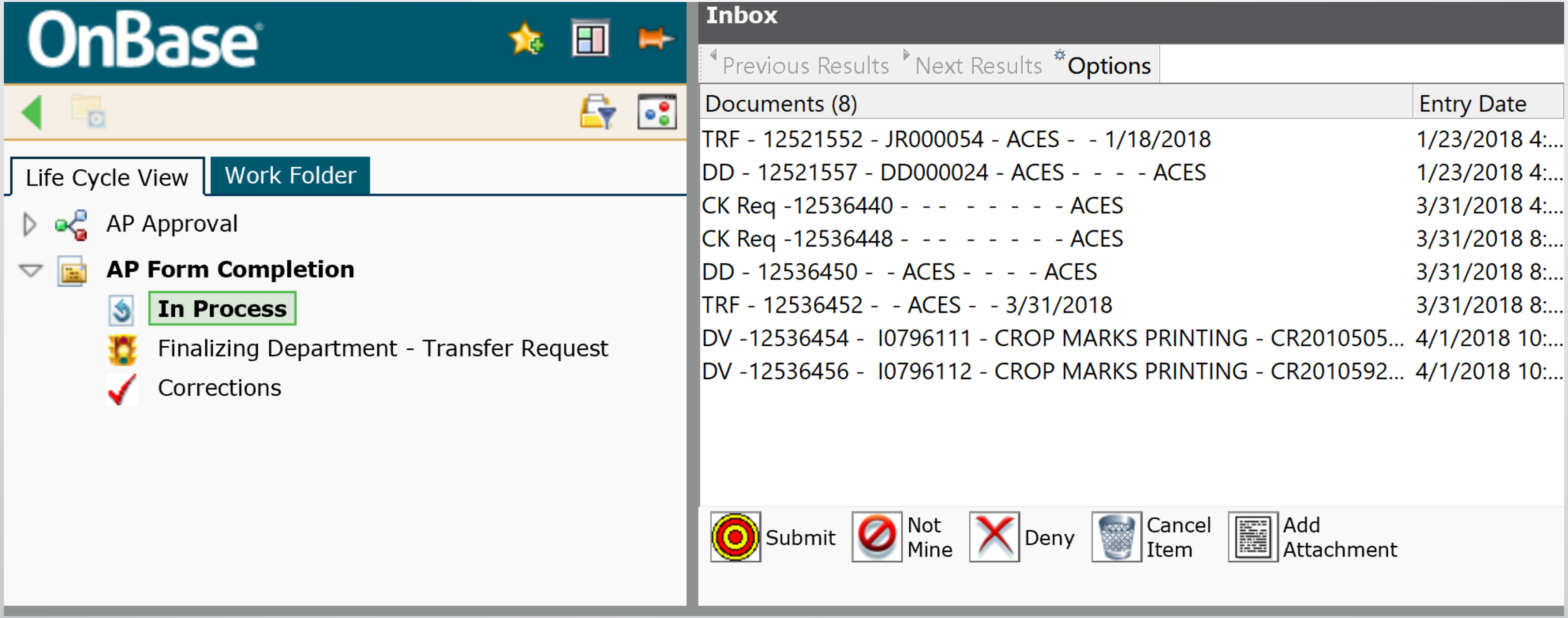
# Inbox without a Filter



# Inbox with a Filter



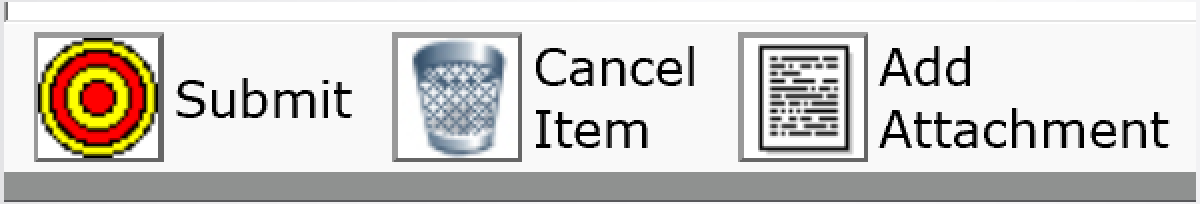
TRF – Transfer Request
DD – Department Deposit
CK Req – Department Check Request
DV – Department Invoice Voucher



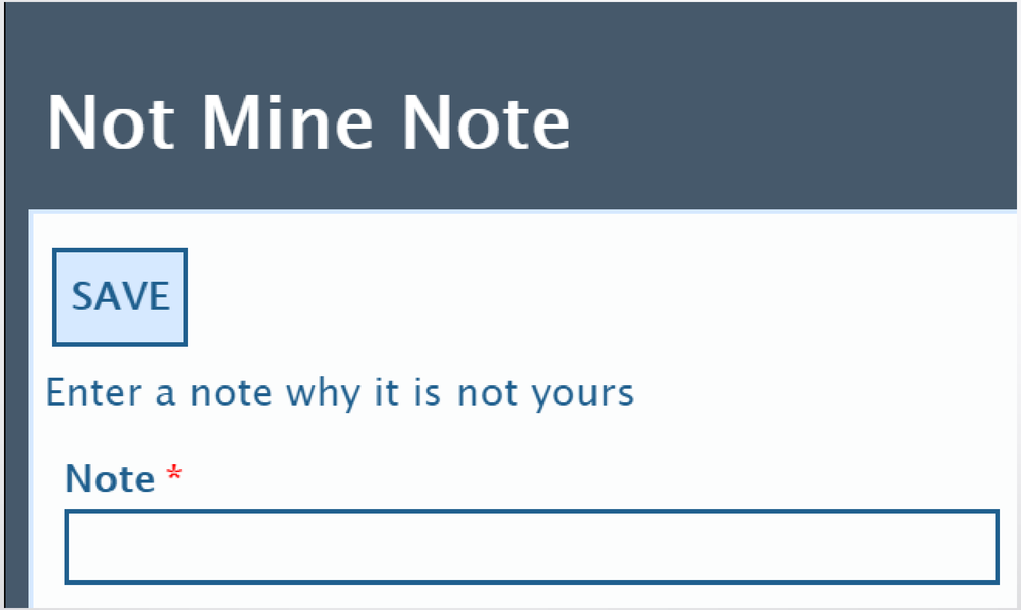
The Task bar in the Life Cycle AP Form Completion > In Process will have 2 different options based on the form that you click on in your inbox.  This is the set that will display if the form is a DV.

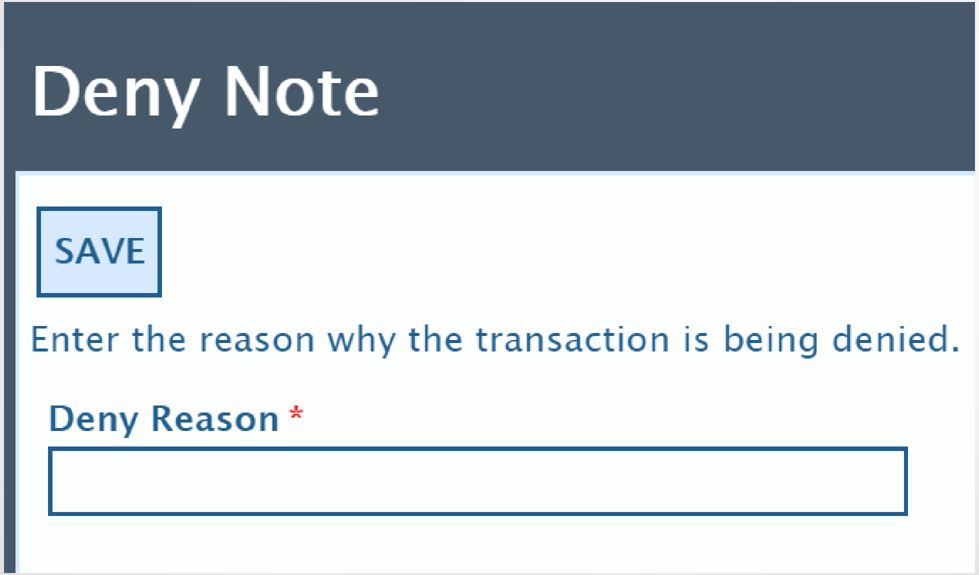

- **Submit** – Sends the form to its next step if all of the required fields are complete
- **Not Mine** – Returns the Department Voucher (DV) to Accounts Payable
- **Deny** – Department has a valid reason to deny payment of an invoice
- Cancel Item – this does not work on a DV
- **Add Attachment** – Opens a window that allows the user to upload an electronic document into OnBase

The Task bar in the Life Cycle AP Form Completion > In Process will have 2 different options based on the form that you click on in your inbox.  This is the set that will display for all forms except the Department Voucher

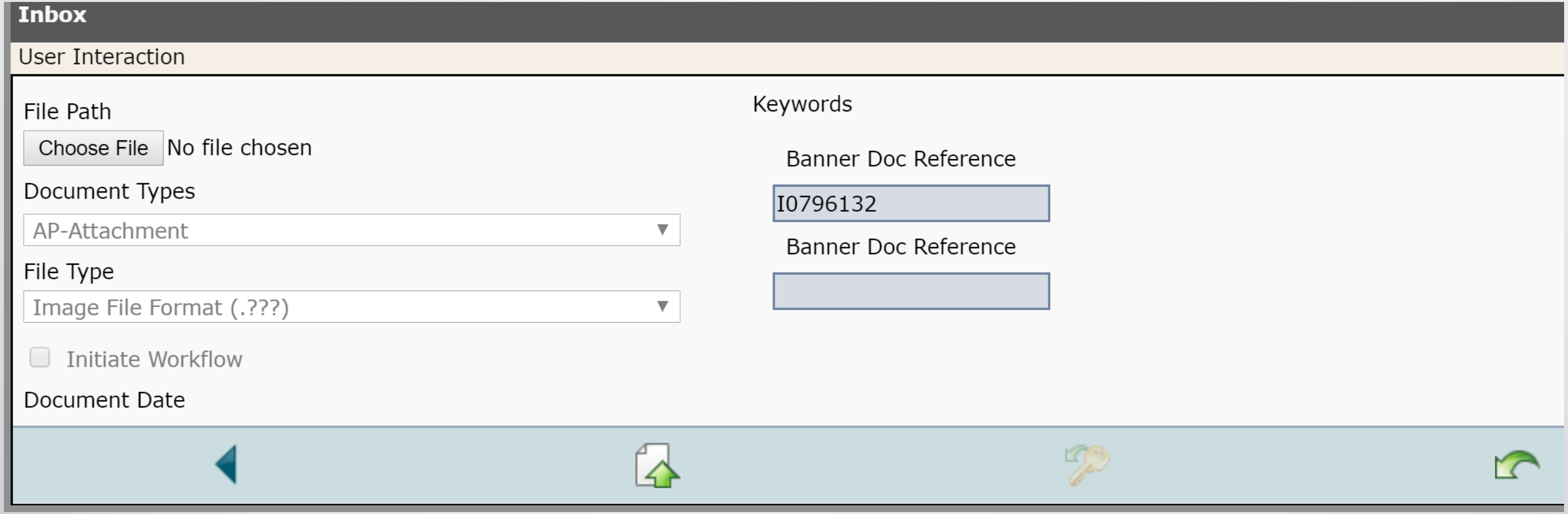



- **Submit** – Sends the form to the next step if all of the required fields are complete
- **Cancel Item** – this does not work on a DV
- **Add Attachment** – Opens a window that allows the user to upload an electronic document into OnBase

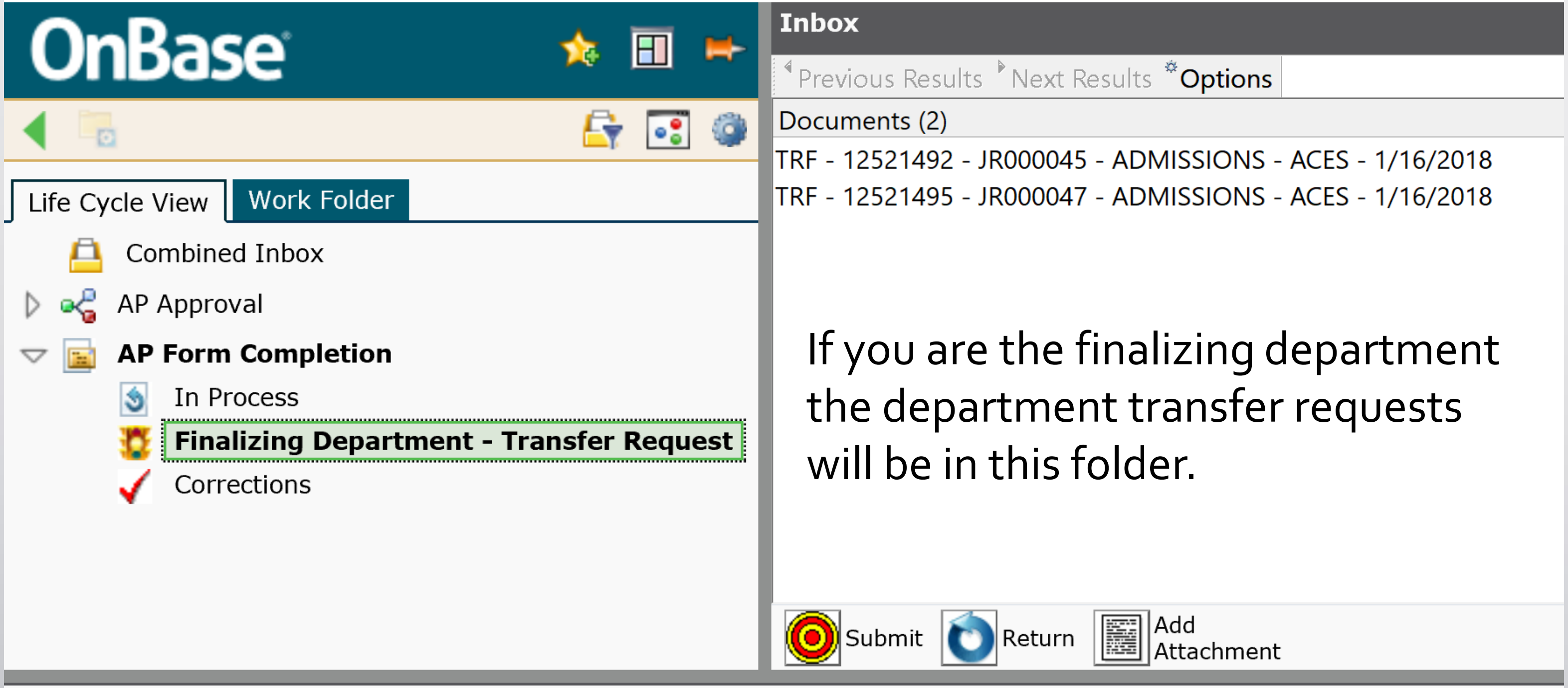

Not Mine Note
SAVE
Enter a note why it is not yours
Note *


Deny Note
SAVE
Enter the reason why the transaction is being denied.
Deny Reason *

# Add Attachment

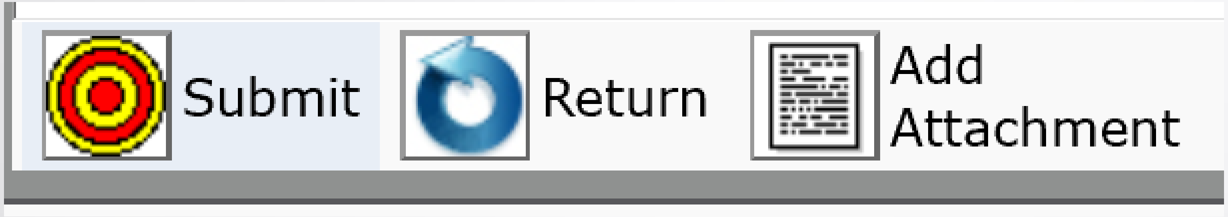



- Click the Choose File button
- Browse your computer for the attachment
- Click the Import Icon

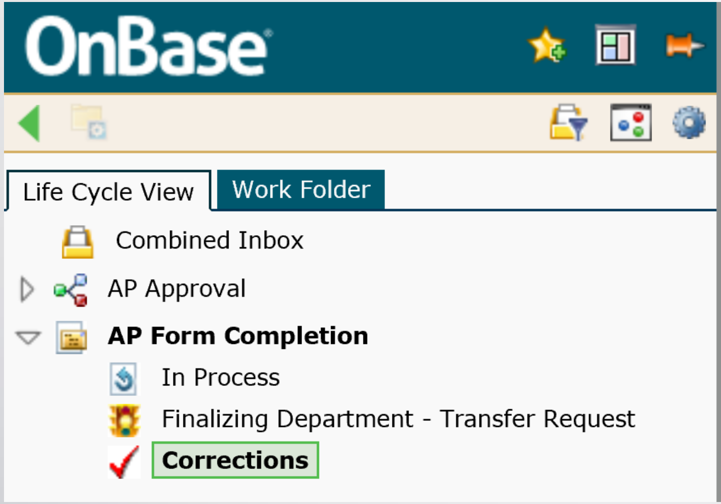


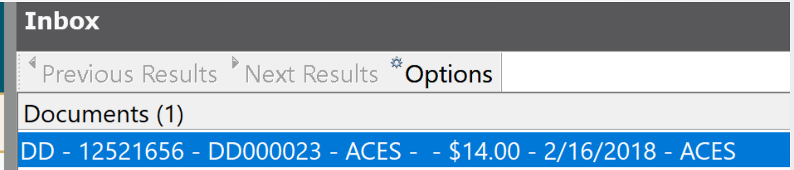

If you are the finalizing department the department transfer requests will be in this folder.

The Task bar in the Life Cycle AP Form Completion > Finalizing Department – Transfer Request



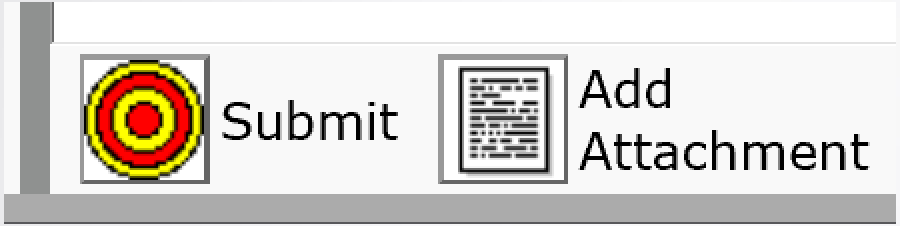

- **Submit** -Sends the form to the next step if all of the required fields are complete
- **Return** – Sends the Transfer Request back to In Process
- **Add Attachment** - Opens a window that allows the user to upload an electronic document into OnBase



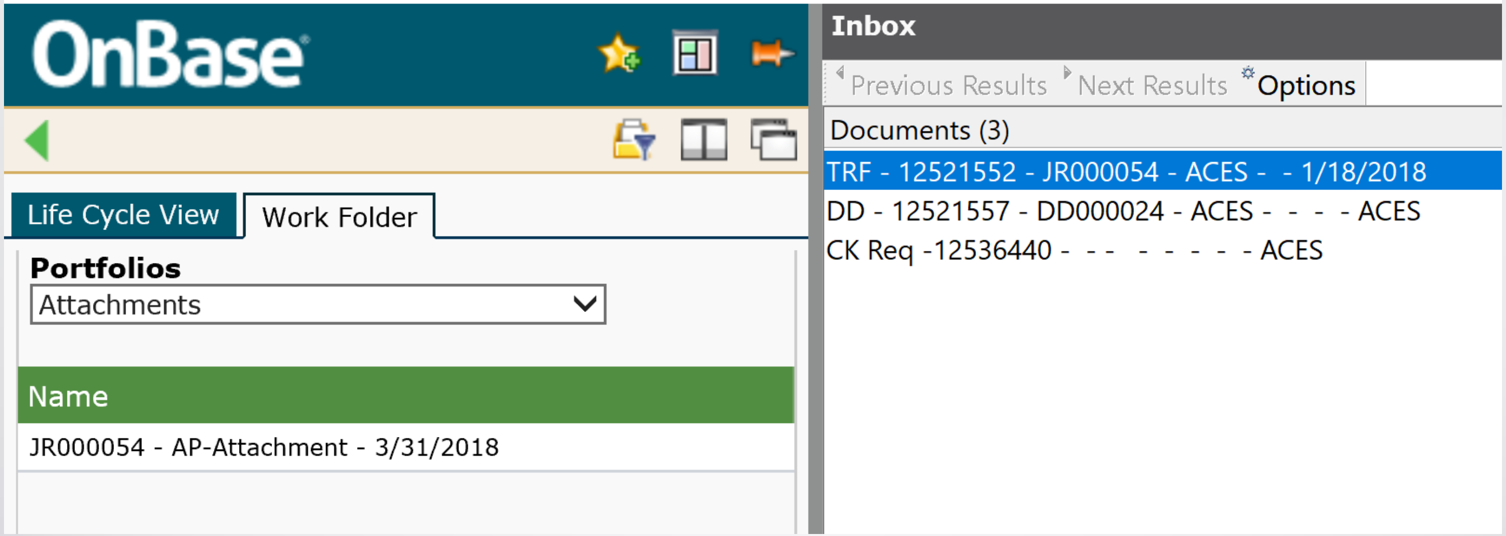




If the FOAP you used for your transaction is not correct the form will be in this folder.

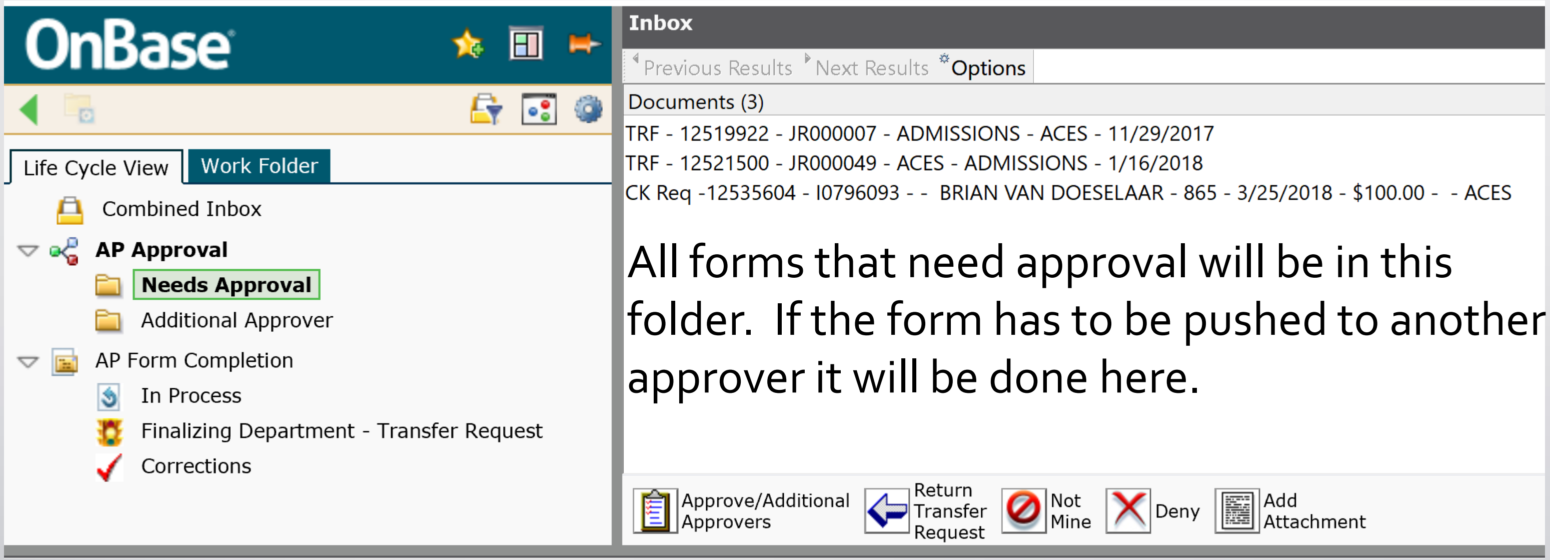
The Task bar in the Life Cycle AP Form Completion > Corrections




**Submit** – Sends the form to its next step if all of the required fields are complete
**Cancel Item** – this does not work on a DV
**Add Attachment** – opens a window that allows the user to upload an electronic document to OnBase




- The Work Folder is used to show any related items to the work that you are currently completing.
- If you are working on a DV the related invoice will be available to view by clicking the drop down arrow on Portfolios and choosing the portfolio DV related to Unity Invoice.
- If you or another person added an attachment to the work you are completing, it will display if the Portfolios says Attachments.



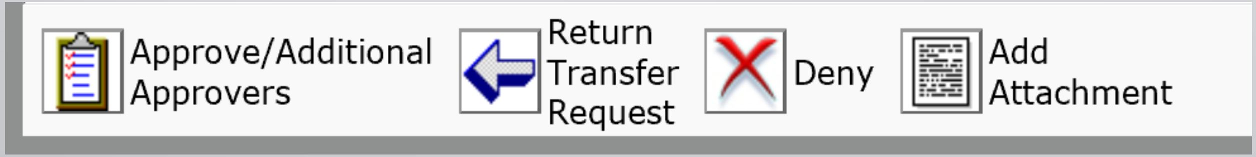

All forms that need approval will be in this folder. If the form has to be pushed to another approver it will be done here.

The Task bar options in Life Cycle AP-Approval > Needs Approval

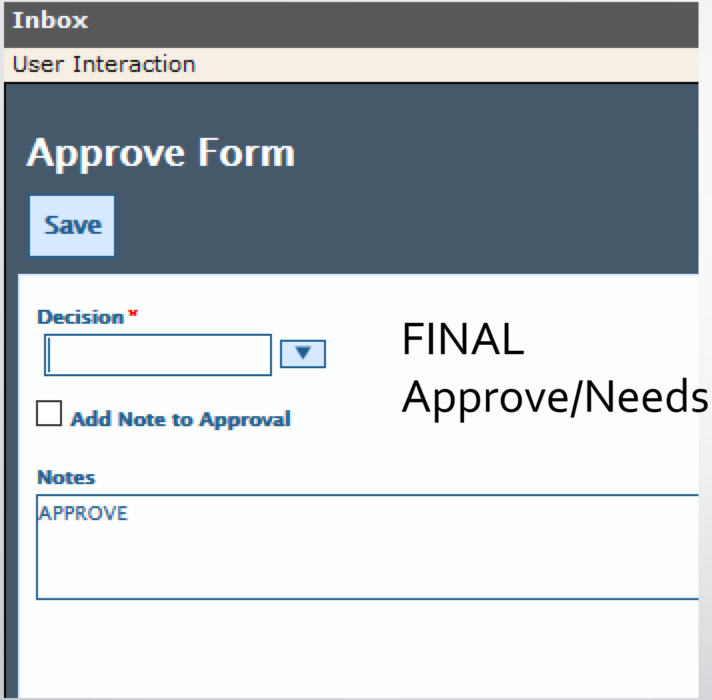
The task bar for a DV and Chk Req have these options


The task bar for a DD has these options


The task bar for a TRF has these options



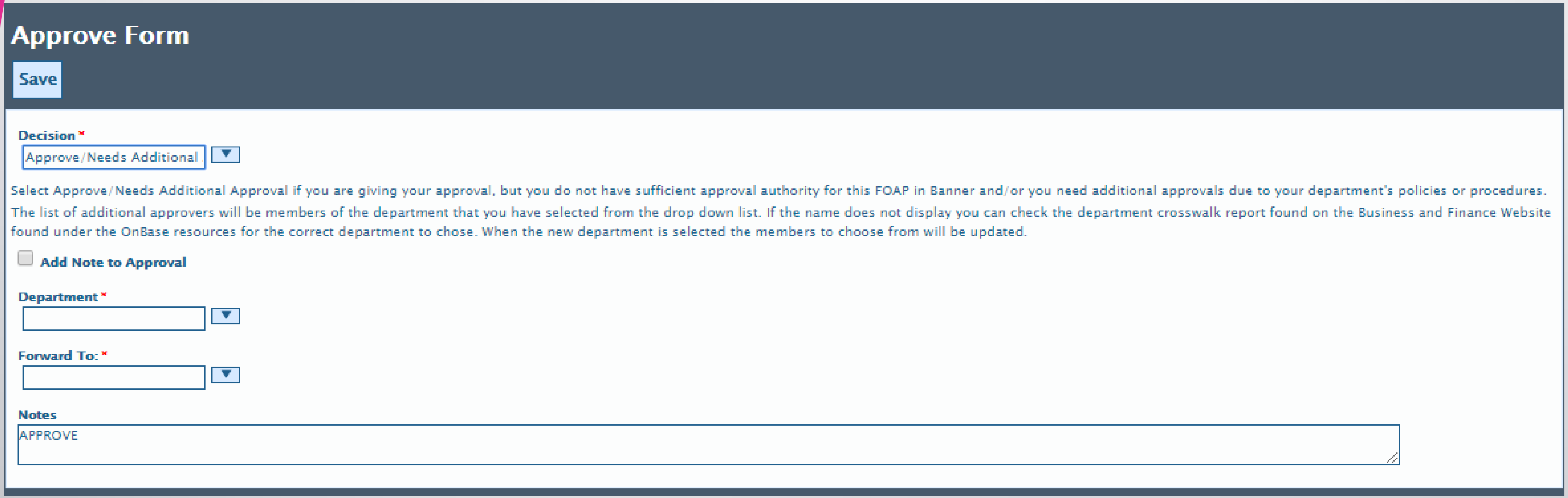
# APPROVE FORM

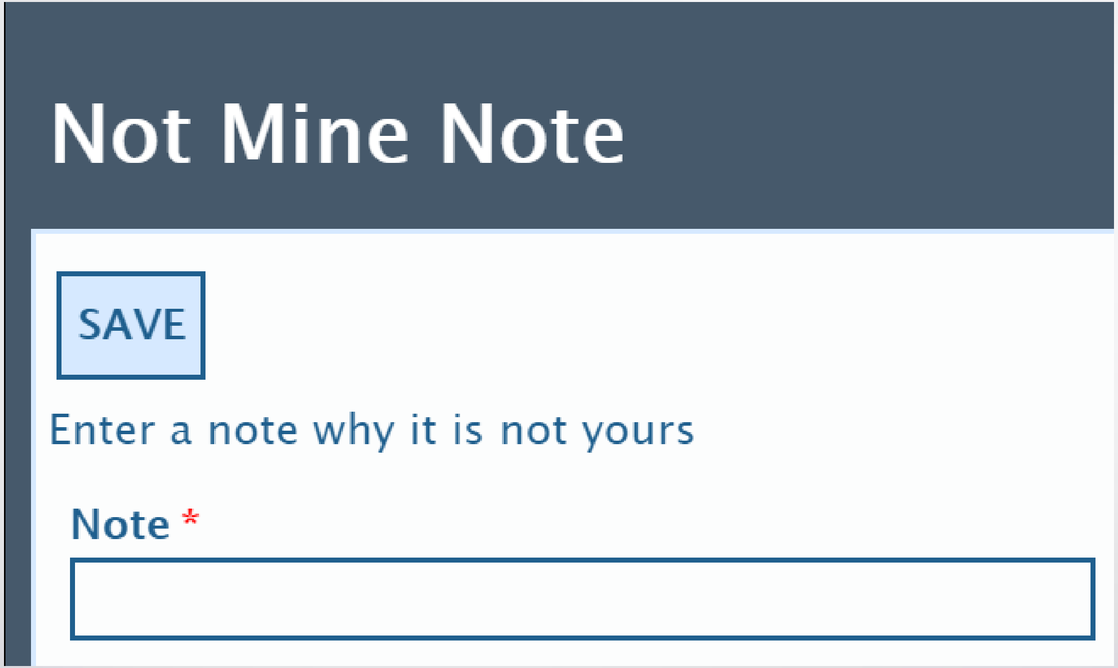



FINAL

Approve/Needs Additional Approval

# Approve/Needs Additional Approval




Not Mine Note
SAVE
Enter a note why it is not yours
Note *

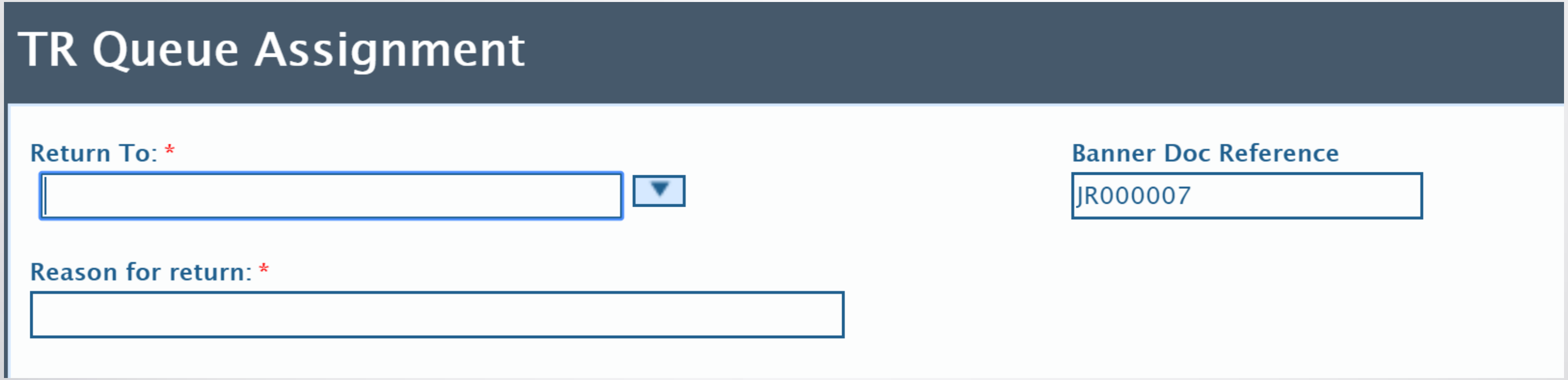
# Deny Note

SAVE

Enter the reason why the transaction is being denied.

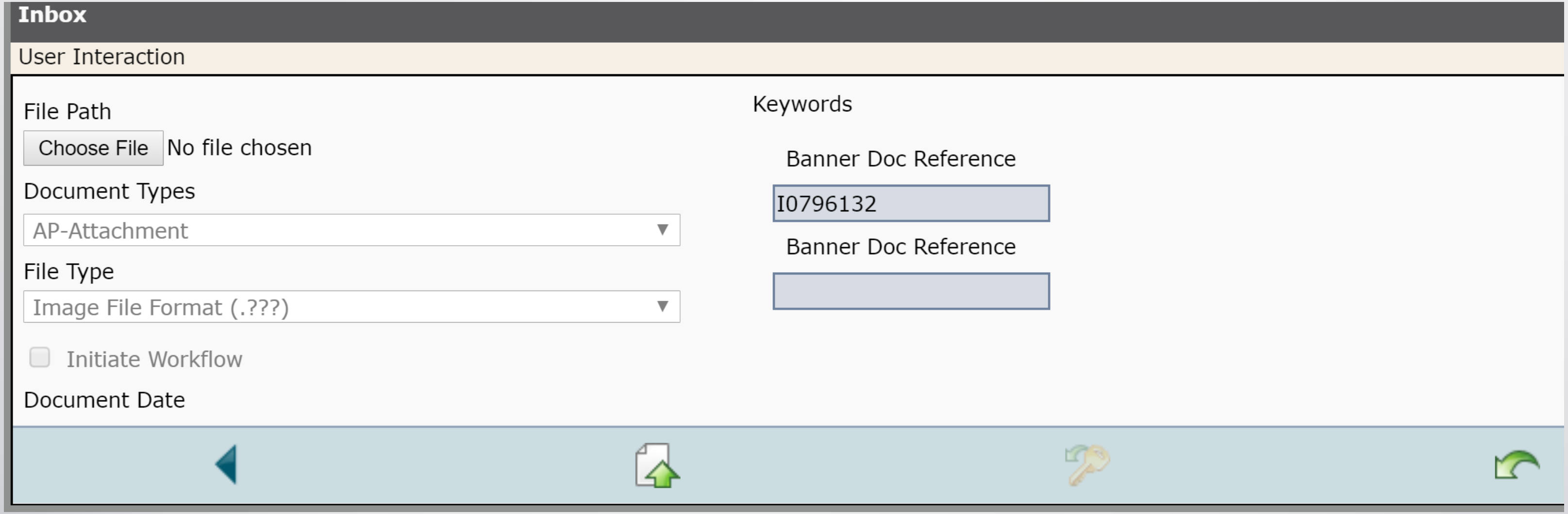
Deny Reason *

## Return Transfer Request

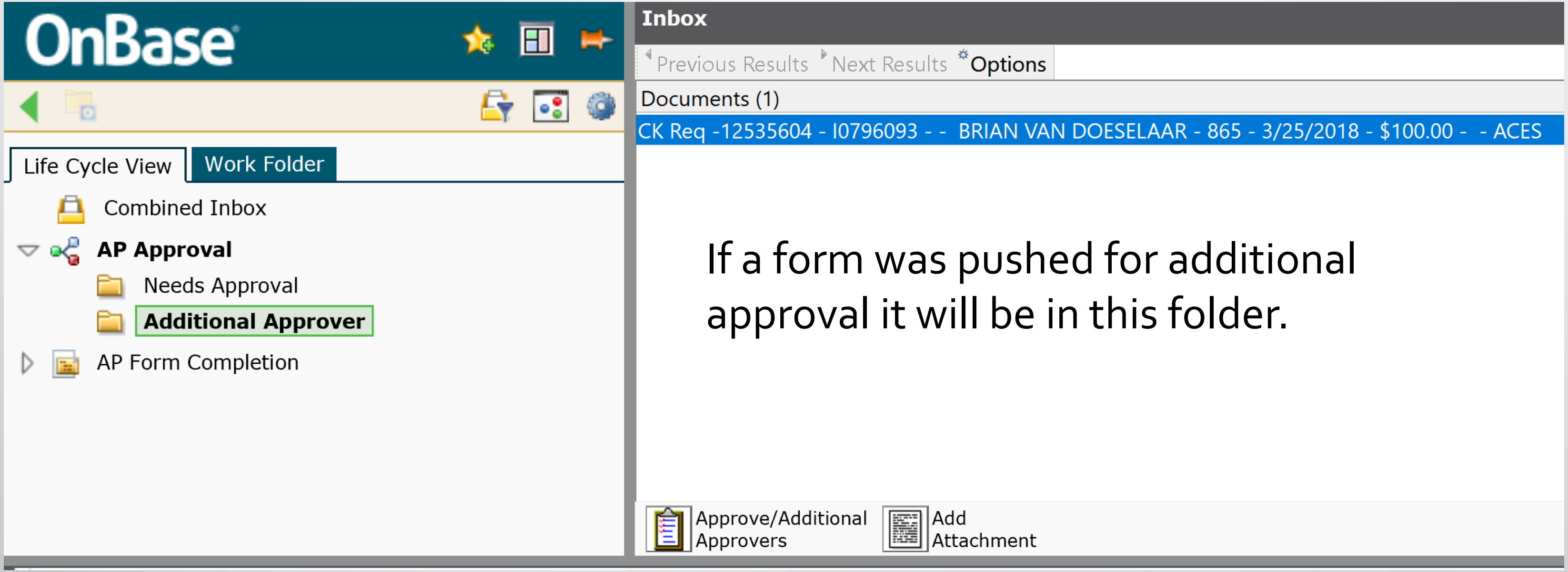



Choose either In Process or
Finalizing Department – Transfer Request

# Add Attachment




- Click the Choose File button
- Browse your computer for the attachment
- Click the Import Icon

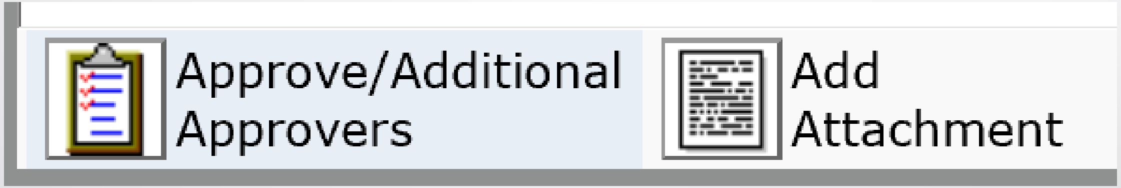



If a form was pushed for additional approval it will be in this folder.

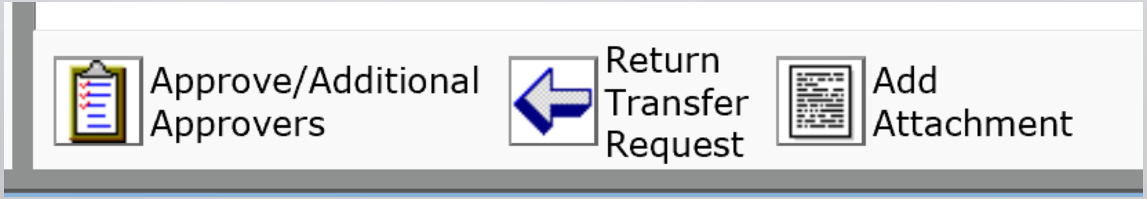
The Task bar options in Life Cycle AP-Approval > Additional Approval

The task bar for a DV and Chk Req have these options

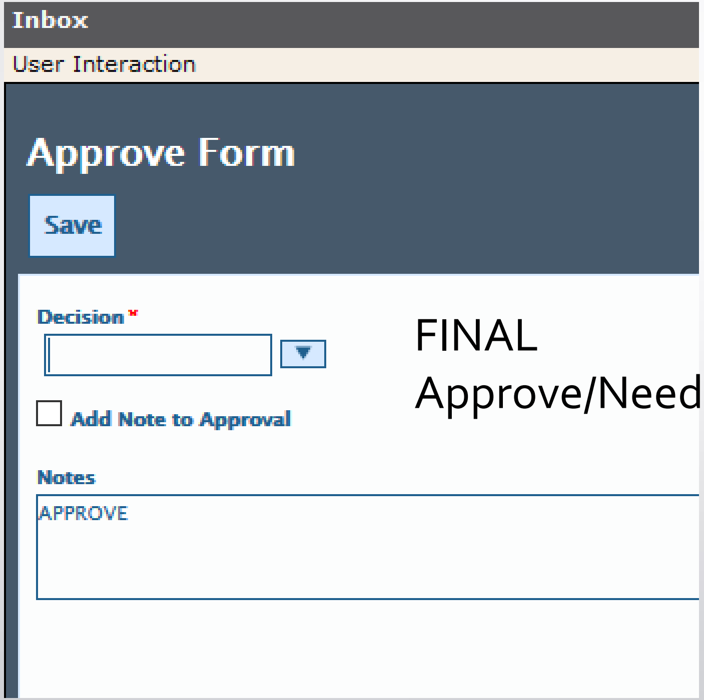

The task bar for a DD has these options




The task bar for a TRF has these options



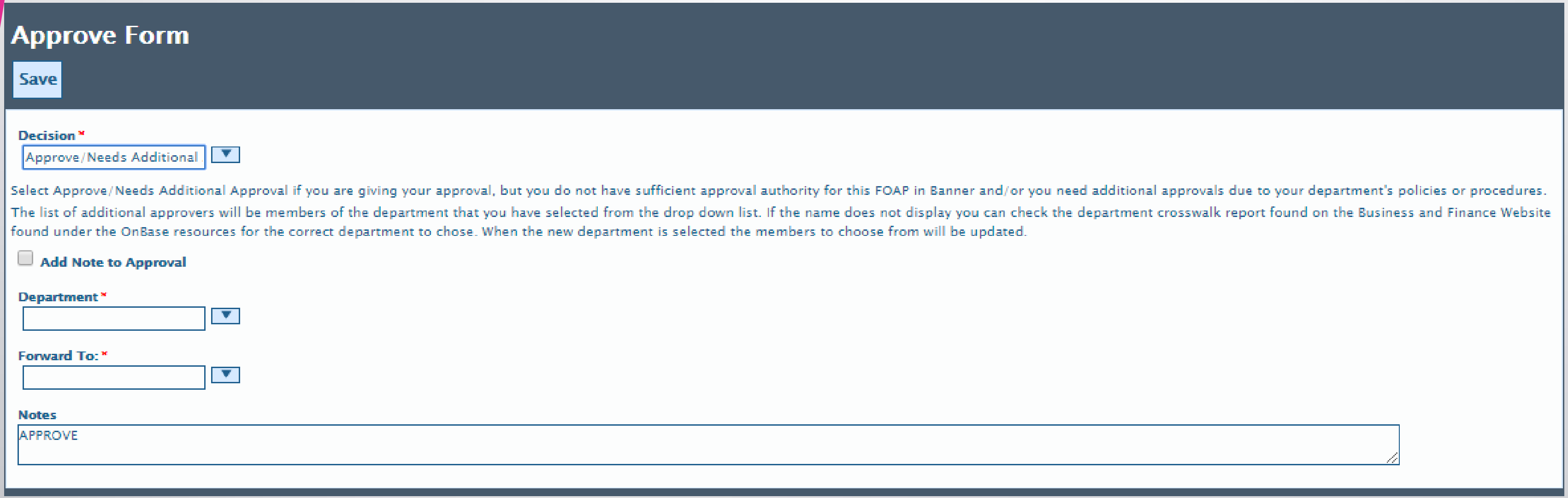
# APPROVE FORM




FINAL

Approve/Needs Additional Approval

# Approve/Needs Additional Approval



## Approve Form

Save

**Decision** *

Approve/Needs Additional

Select Approve/Needs Additional Approval if you are giving your approval, but you do not have sufficient approval authority for this FOAP in Banner and/or you need additional approvals due to your department's policies or procedures. The list of additional approvers will be members of the department that you have selected from the drop down list. If the name does not display you can check the department crosswalk report found on the Business and Finance Website found under the OnBase resources for the correct department to chose. When the new department is selected the members to choose from will be updated.

**Add Note to Approval**

**Department** *

**Forward To:** *

**Notes**

APPROVE

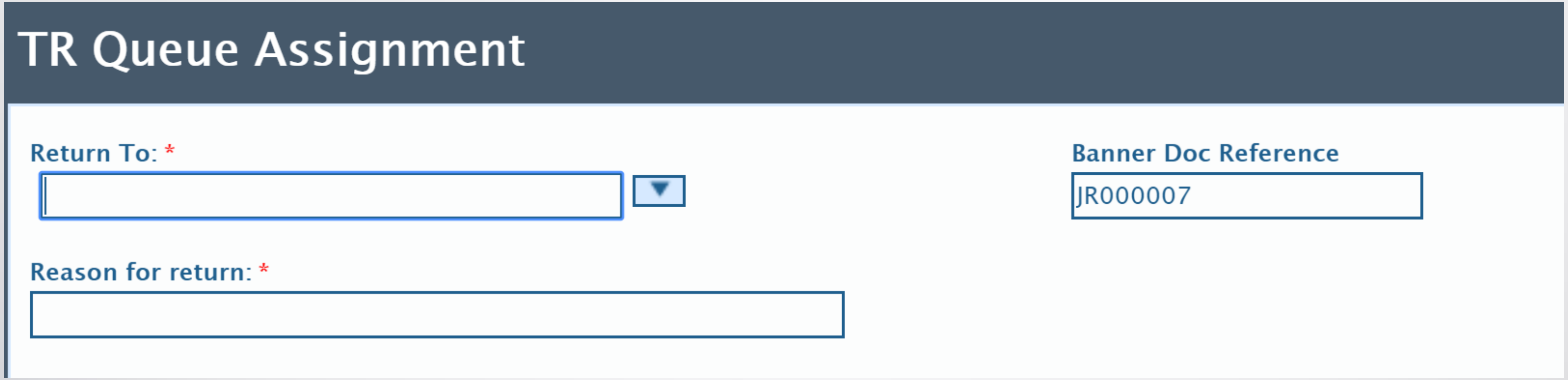
# Deny Note

SAVE

Enter the reason why the transaction is being denied.

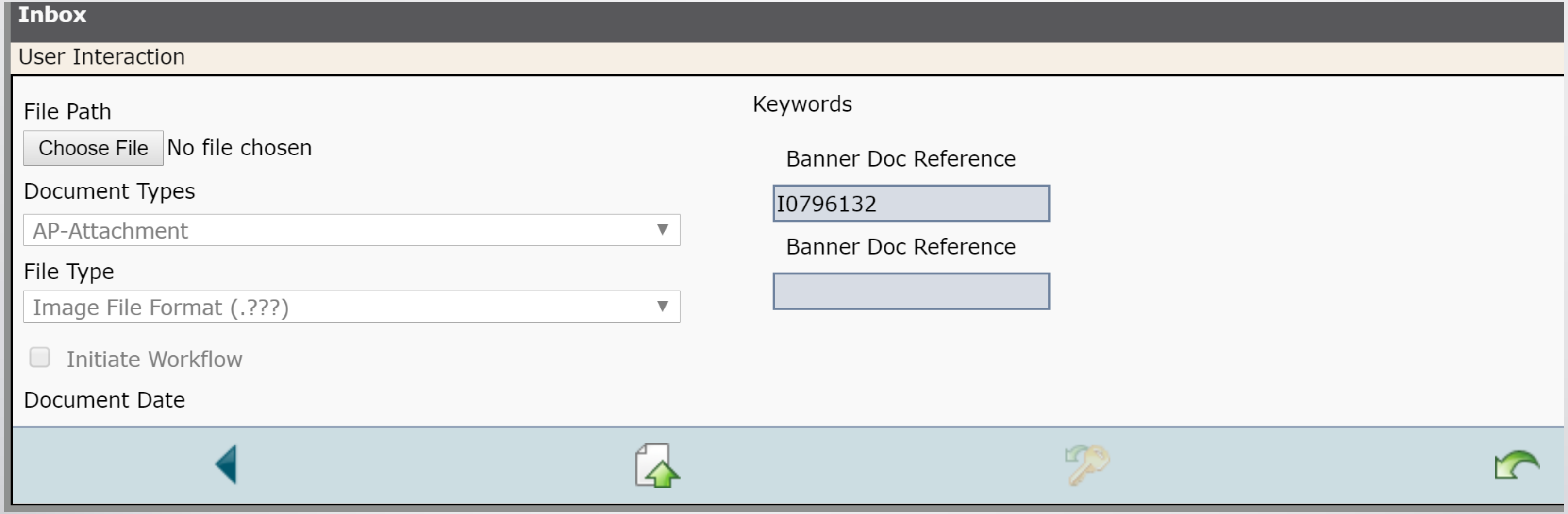
Deny Reason *

# Return Transfer Request

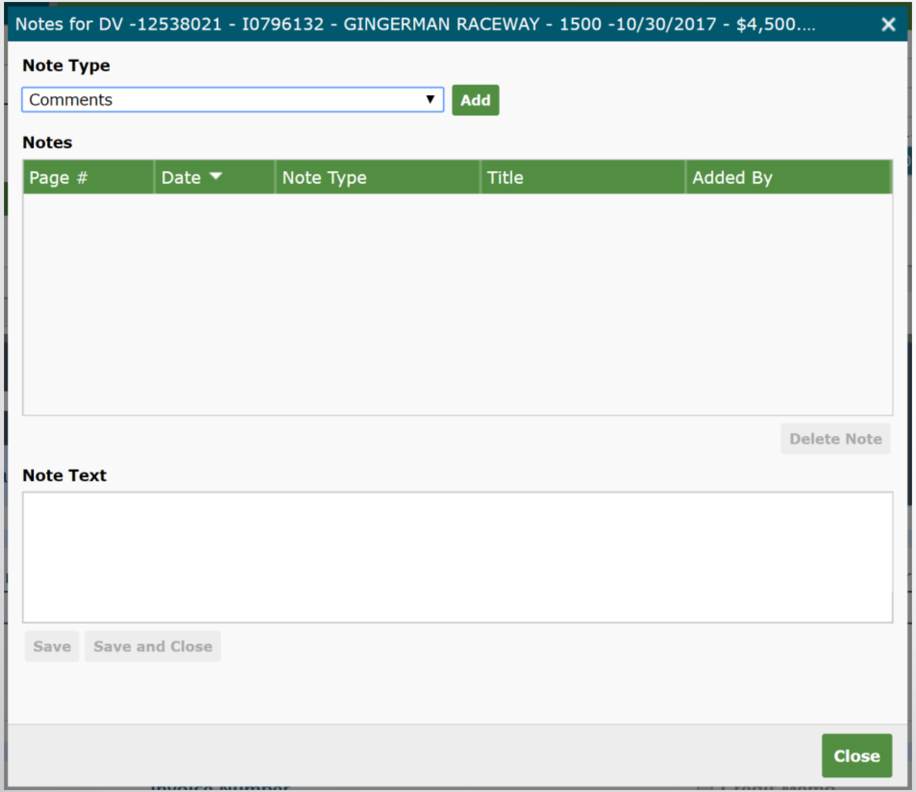



Choose either In Process or
Finalizing Department – Transfer Request

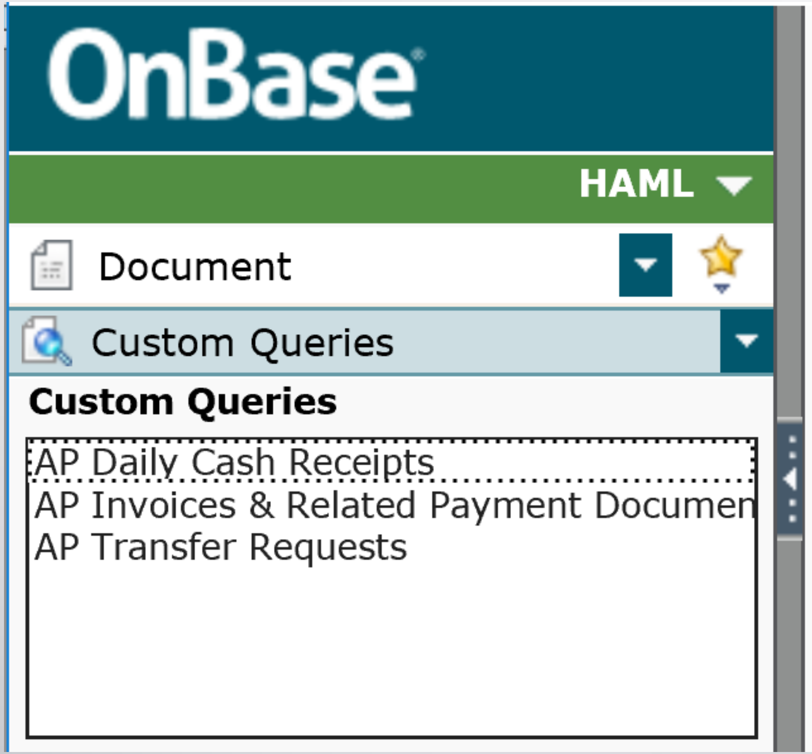
# Add Attachment




- Click the Choose File button
- Browse your computer for the attachment
- Click the Import Icon



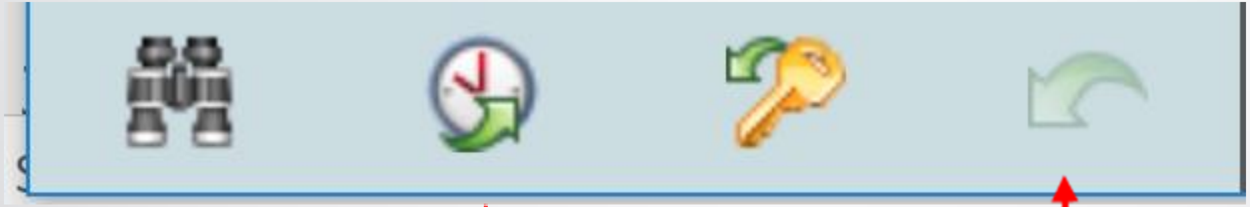

- To add a note right click on your document
- Select Notes from the popup menu
- Select the type of note from drop down arror
- Click Add
- Enter Note text in the Note Text box
- Click Save and Close and the notes window will close
- Click Save to add more notes
- Click Close to close the notes window




- Custom Queries are another way to perform document retrieval.
- It is suggested that that users begin to use the custom query function because the information will be found on multiple document types going forward.
- The three custom queries here combine the like document types together to help users find the information regardless of the document type.

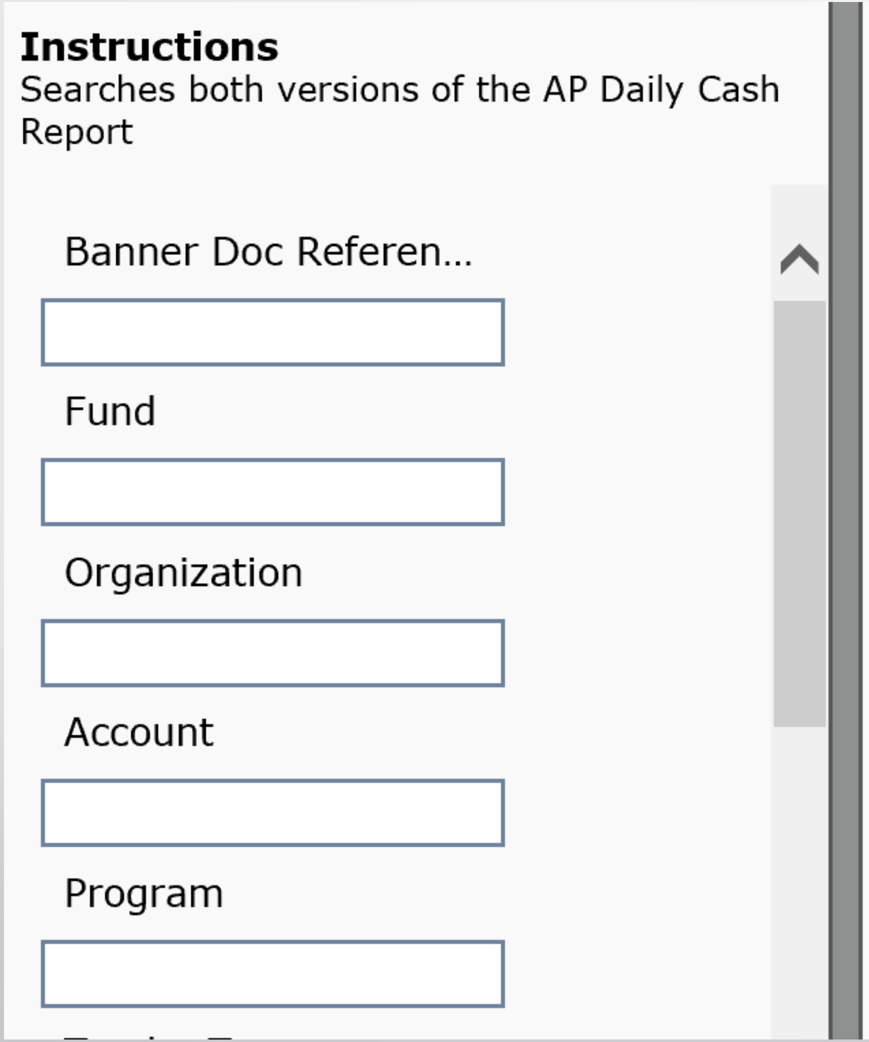
Click this Icon to start the query or click the enter key

Click this Icon to clear the keywords from your query

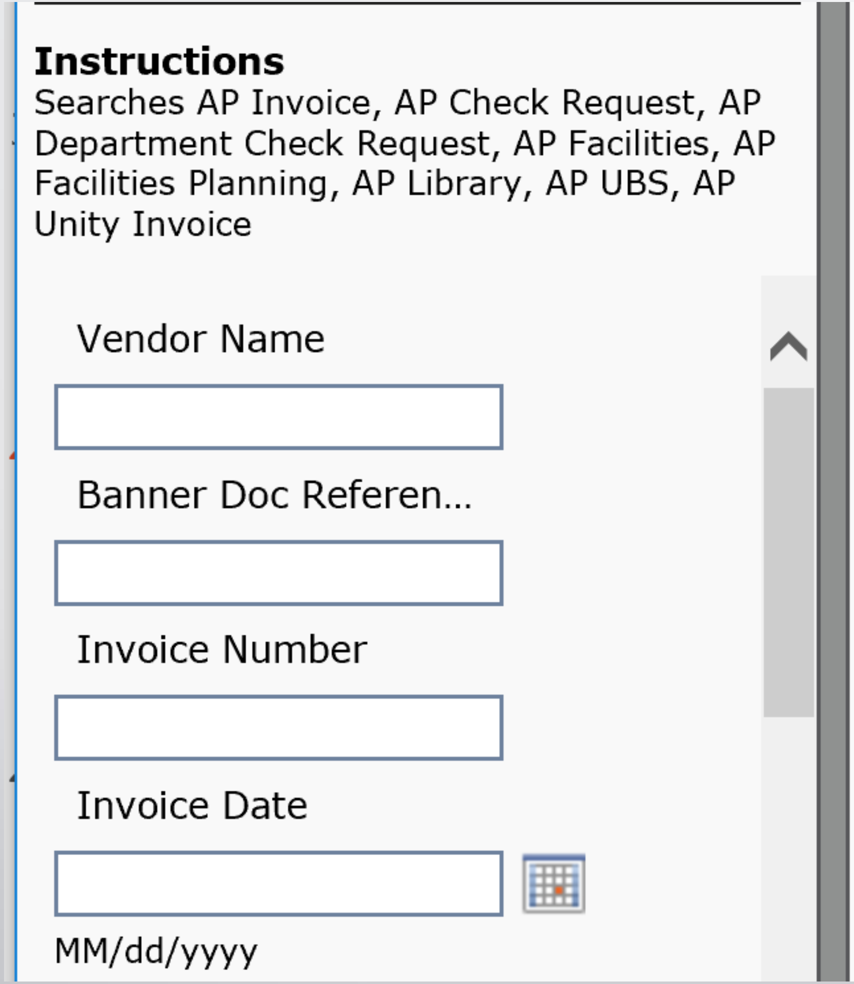


Click this Icon to clear your query history

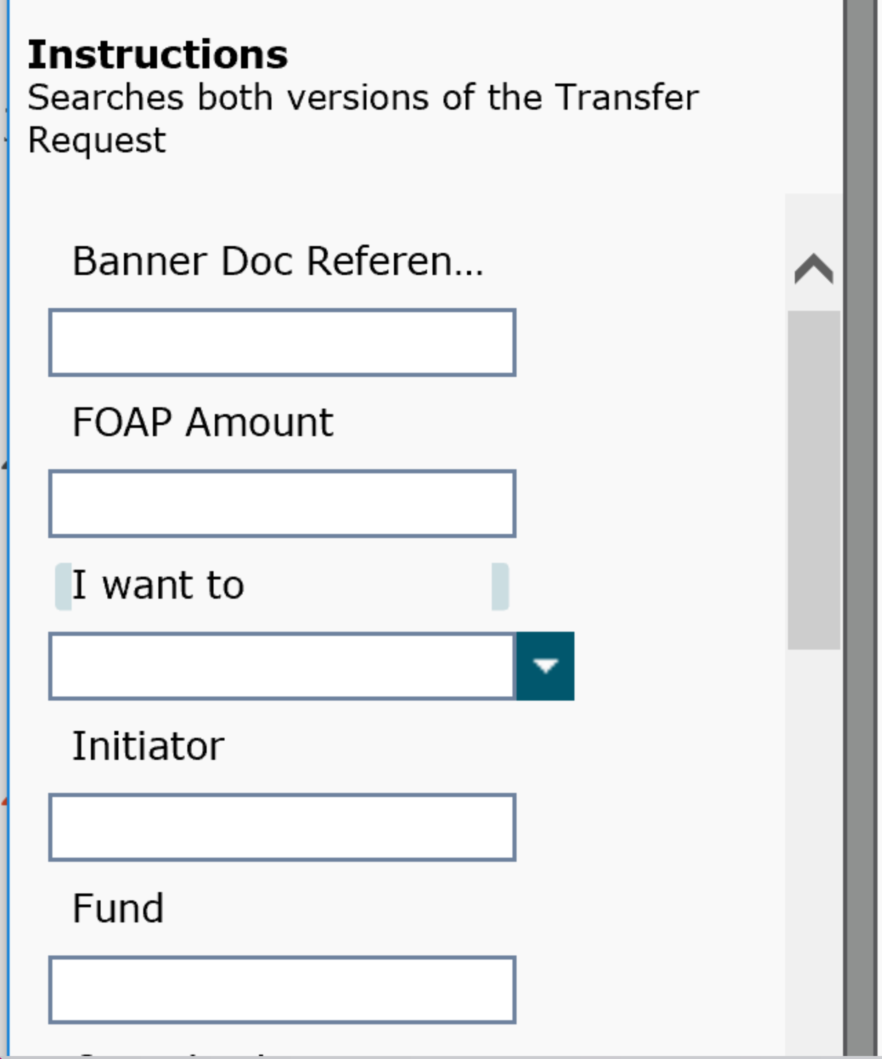
Click this Icon to clear the keywords and the query that was selected to start




To search for daily cash reports the most successful results will be using the banner doc reference or the FOAP of the deposit.

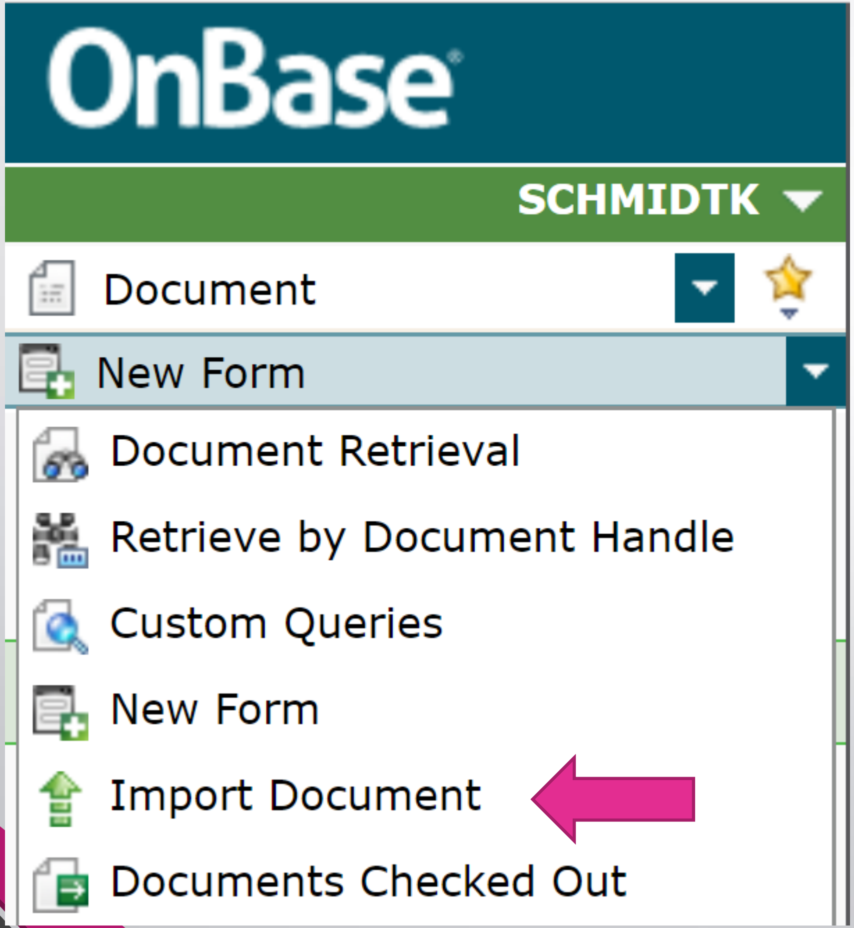



- The most successful searches will be with the Banner Doc Reference or Invoice Number.
- Remember when searching the information entered has to match exactly.
- Use the * as a wild card especially when using the vendor name.
- An employee’s name now will be the full legal name including middle initial

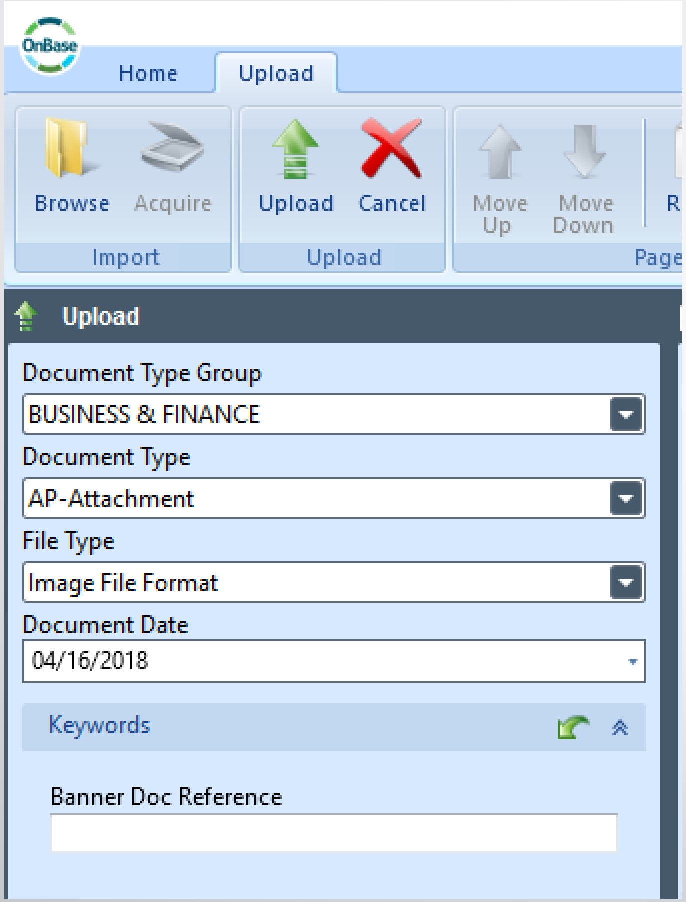



- The best results will be with the banner doc reference number.
- The questions found under the "I want to" box would allow you to search for the different kinds of transfer requests that you created.

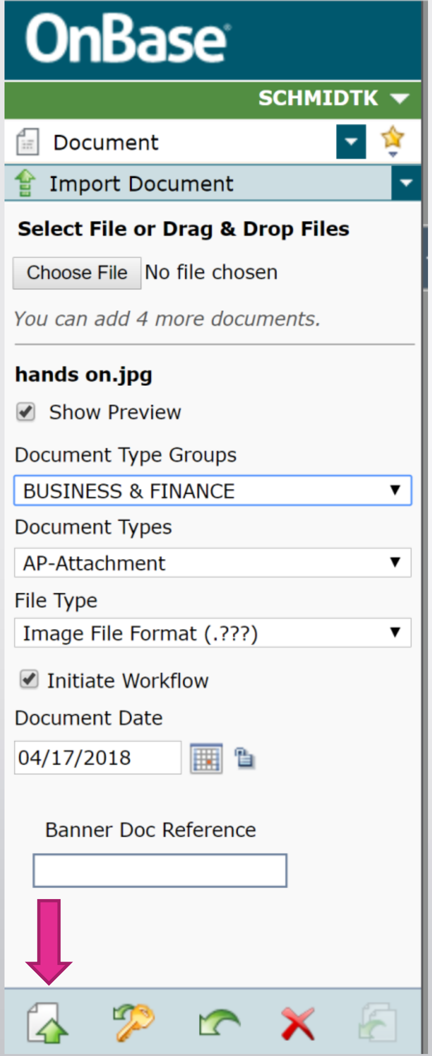
# Add Attachments outside of workflow




- Click the second drop down arrow
- Select Import Document



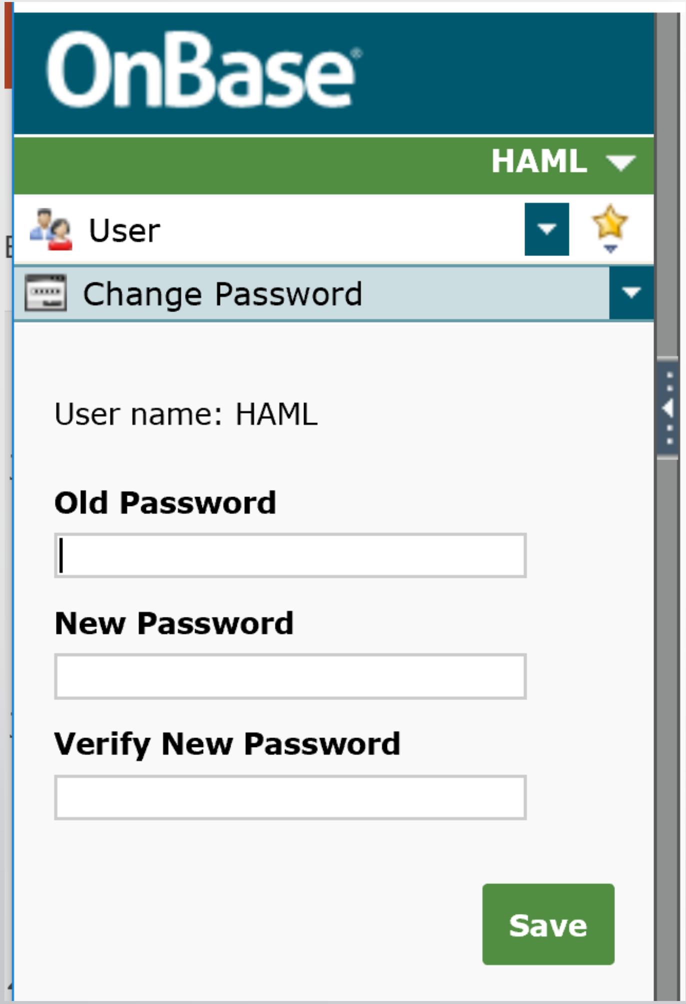

- Click the Browse Button
- Search your computer and network locations for your attachment
- Click the Open button the file that was selected
- Click the Document Type Group drop down and select Business & Finance
- Click the Document Type drop down and select AP-Attachment
- Enter the Banner Doc Reference number
- Click the Upload button




- Click the Choose File button to browse your computer for a file
- Click the drop down arrow on the Document Type Group and select Business & Finance
- The Document Type should read AP-Attachment
- Enter the Banner Doc Reference of the document that needs the attachment
- Click the upload arrow to have the document saved into OnBase

# How to Print a Form

- Click the form to have it open in the viewer window
- Right Click on the form
- Choose the Print option




To change your password

- Click on the top drop down arrow (normally says document)
- Select User a mailbox appears in the second drop down window.
- Click the second drop down arrow.
- Select Change Password.

# Where can I find more resources?

- This is the URL for the OnBase Resource page for Business and Finance: https://www.gvsu.edu/busfin/onbase-41.htm
- This presentation and all of the user guides will be available at this link.
- There is a training video from the creators of OnBase on how to use the web client located on this page as well.

Thanks!

# ANY QUESTIONS?