



OnBase Info Session

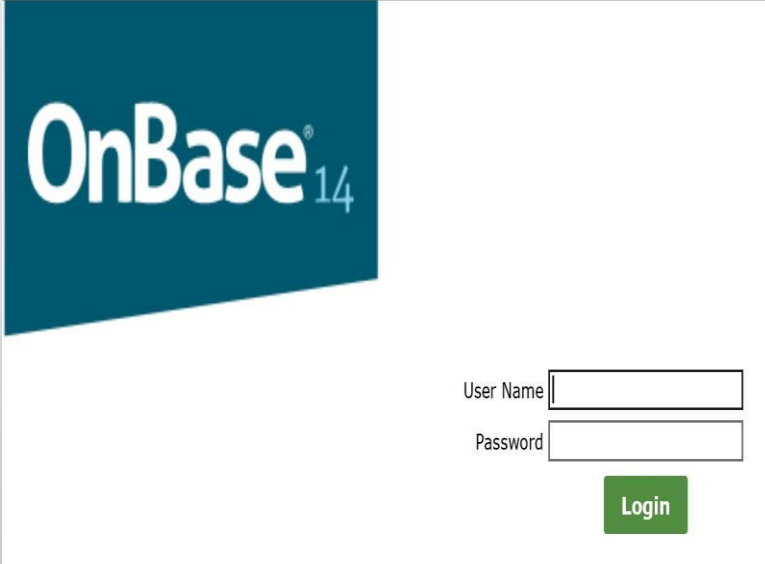


<https://www.onbase16.gvsu.edu/AppNet/Login.aspx>



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>



The image shows the OnBase 14 login interface. On the left, there is a dark teal square with the text "OnBase[®]14" in white. To the right of this square, there are two input fields: "User Name" and "Password". Below these fields is a green button with the text "Login".



The image shows the OnBase 16 login interface. On the left, there is a large, colorful circular graphic composed of multiple concentric arcs in shades of pink, blue, green, and purple. To the right of this graphic, the text "OnBase[®]16" is displayed in a dark blue font. Below the text, there are two input fields: "User Name" and "Password". Below these fields is a green button with the text "Login".



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

DP - 13486031 - ADMISSIONS - 10/25/2017

Header

Created By

HOSTR

Department

ADMISSIONS

Department Code

ADMIS

Current User's Display Name

VANDOESB

Category

Notifications

Add

Notification Type

DEPARTMENT CHECK R

Contact Name

STEPHANIE SALAMONE

Email

SALAMOST@GVSU.EDU

Start Date

11/01/2017

End Date

11/01/2030

Remove

Notification Type

DEPARTMENT TRANSFE

Contact Name

STEPHANIE SALAMONE

Email

SALAMOST@GVSU.EDU

Start Date

11/01/2017

End Date

11/01/2030

Remove

Notification Type

DEPARTMENT INVOICE

Contact Name

STEPHANIE SALAMONE

Email

SALAMOST@GVSU.EDU

Start Date

11/01/2017

End Date

11/01/2030

Remove

FOAPAL

Add

Form Foapal

ENT INVOICE VOUCHER

Fund

110000

Organization

32102

Account

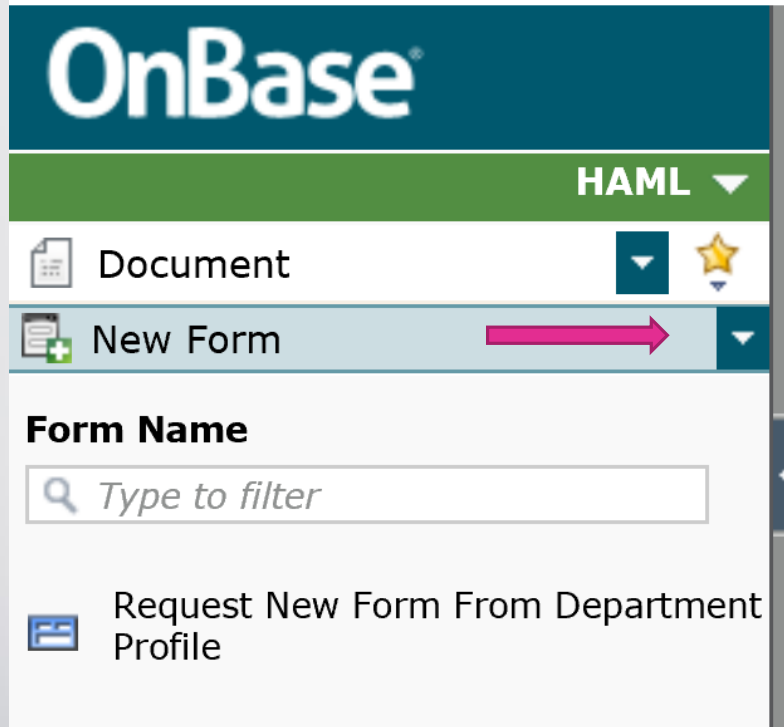
Program

556

Validate

Validation Message

Remove



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*

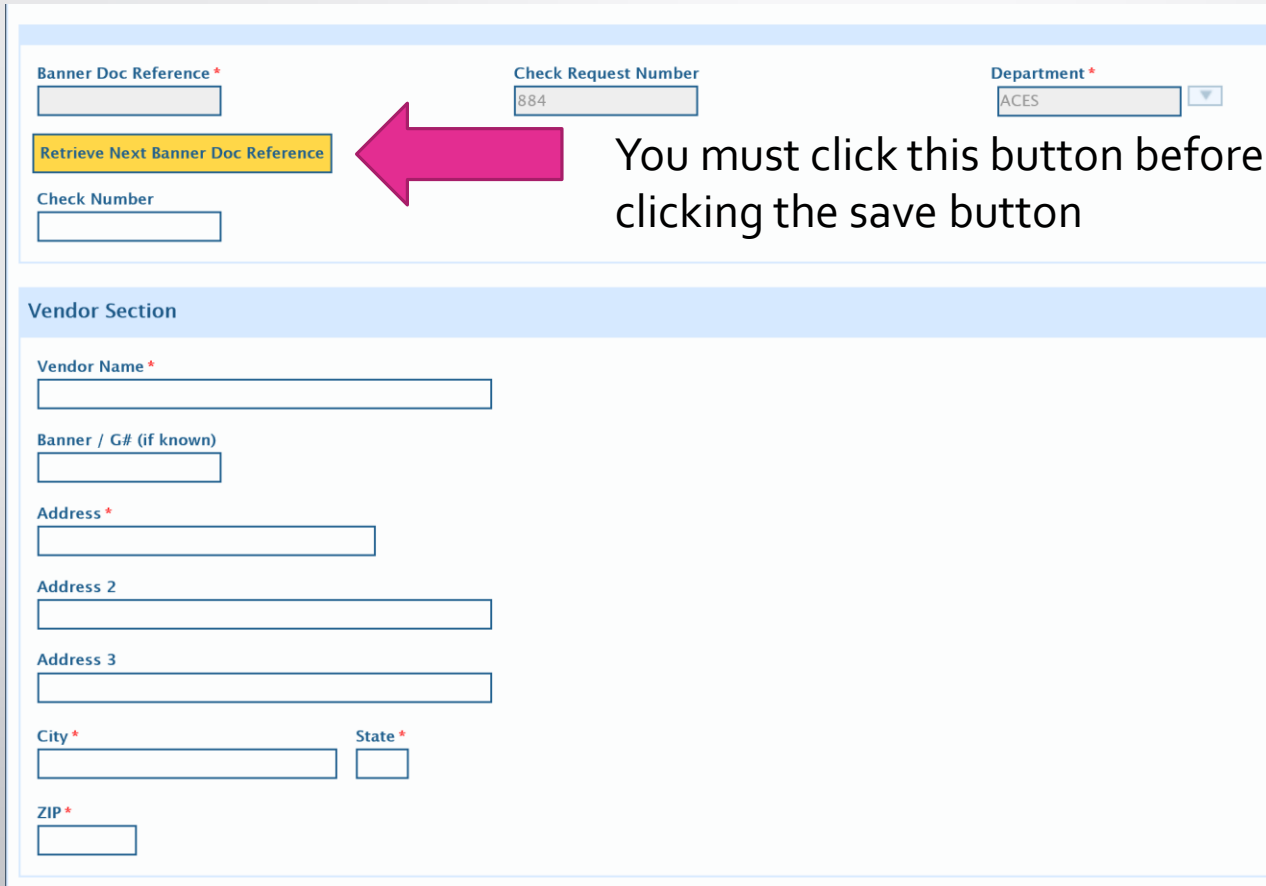
- Department Check Request
- Department Deposit
- Department Transfer Request

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.



The screenshot shows a web form for creating a Department Check Request. At the top, there are three fields: 'Banner Doc Reference *' (empty), 'Check Request Number' (containing '884'), and 'Department *' (a dropdown menu showing 'ACES'). Below these is a yellow button labeled 'Retrieve Next Banner Doc Reference'. A large pink arrow points from this button towards the right, where the text 'You must click this button before clicking the save button' is displayed. Below the button is a 'Check Number' field (empty). The form is divided into a 'Vendor Section' which contains several fields: 'Vendor Name *' (empty), 'Banner / G# (if known)' (empty), 'Address *' (empty), 'Address 2' (empty), 'Address 3' (empty), 'City *' (empty), 'State *' (empty), and 'ZIP *' (empty).

Banner Doc Reference *

Check Request Number

Department *

Retrieve Next Banner Doc Reference

Check Number

Vendor Section

Vendor Name *

Banner / G# (if known)

Address *

Address 2

Address 3

City * State *

ZIP *

You must click this button before clicking the save button

Check Details Section

Invoice Date

03/31/2018

Purpose for Request *

Explanation *

Send Attachment

☐

Check Amount *

Distribution Method *

FOAPAL SECTION

Fund

110000

Organization

Account

Program

Amount

Validate

Validation Message

Add

Remove

Select the person to approve this request.

Signature Authority *

Notes

FOAP TOTAL

0.00

Balanced

☒

Save

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

Department Deposit


Department Deposit

Approval History

Banner Doc Reference *

Retrieve Next Banner Doc Reference

Department *

Report Date *

The report date is the date that the activity/settlement occurred, not necessarily the date the daily cash report was prepared.

Banner Description

The first part of Banner Description will be seen in Banner, along with the category and Report Date.

Further Explanation

For Department information only

Tender Type Group

Add

Tender Type

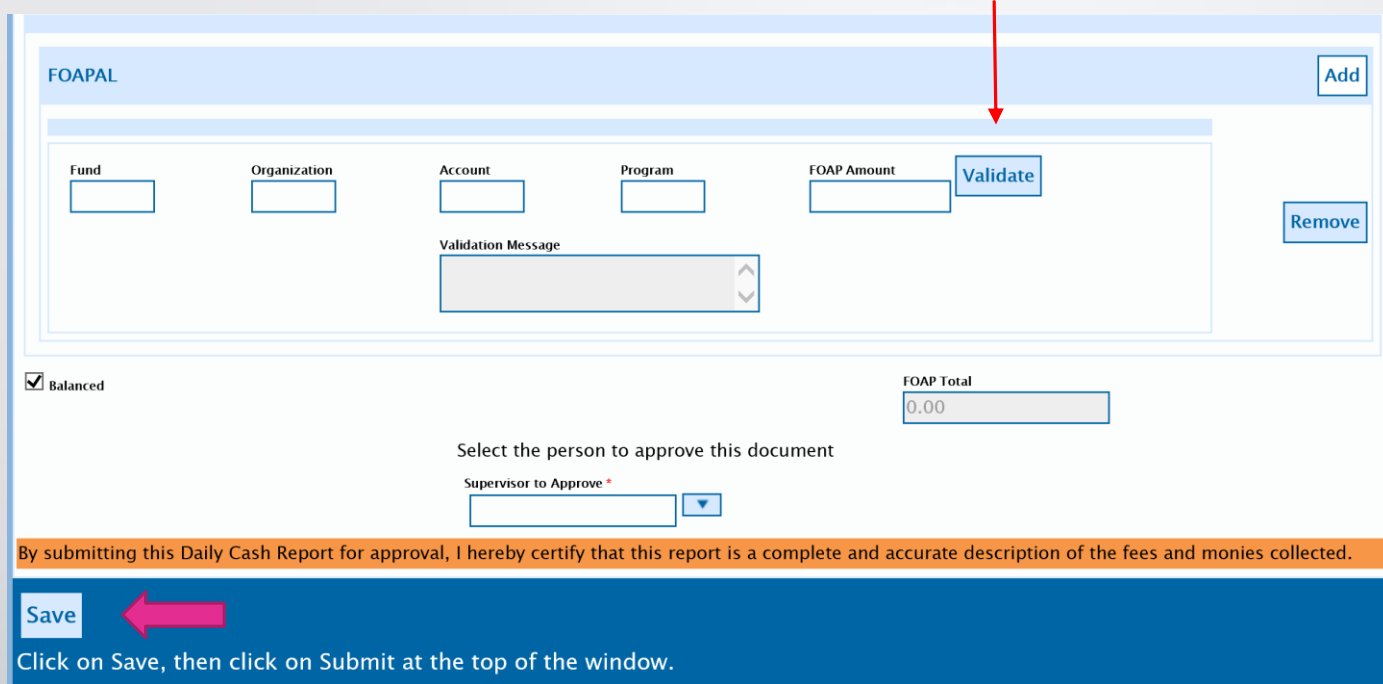
Batch Number

Amount

Total Deposit

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

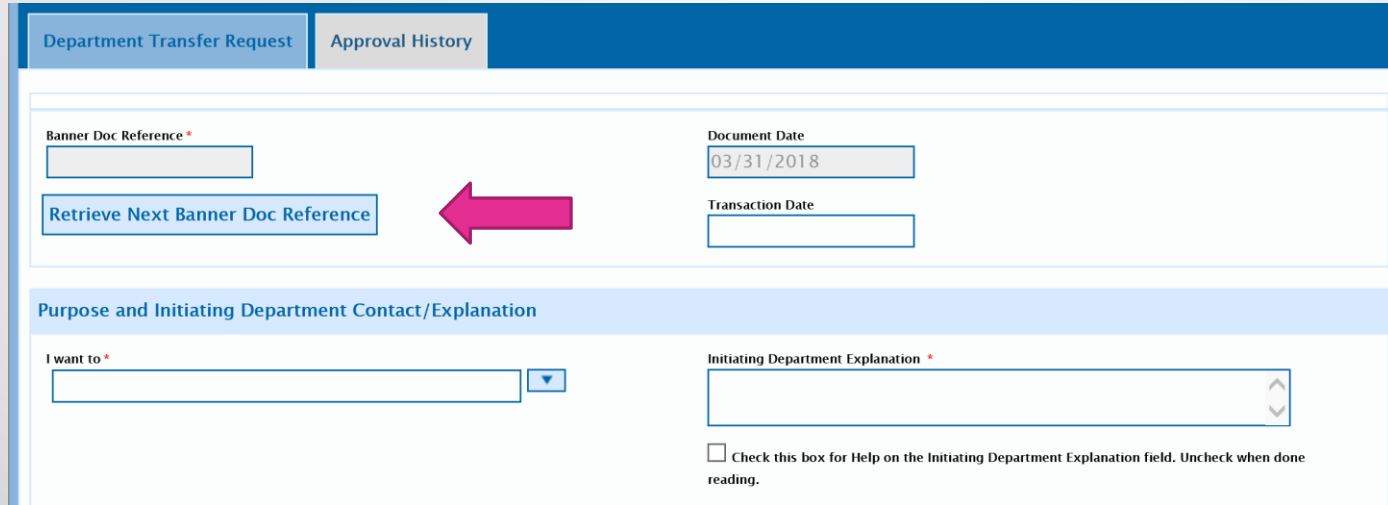
Want to make sure that you filled in a valid FOAP? Click the validate button.



The screenshot shows a web form titled "FOAPAL" with a light blue header. In the top right corner of the header is an "Add" button. Below the header, there is a row of five input fields: "Fund", "Organization", "Account", "Program", and "FOAP Amount". To the right of the "FOAP Amount" field is a blue "Validate" button, which is pointed to by a red arrow from the text above. To the right of the "Validate" button is a blue "Remove" button. Below these fields is a "Validation Message" label and a text area with up and down arrow icons. At the bottom left, there is a checked checkbox labeled "Balanced". At the bottom right, there is a label "FOAP Total" and a text box containing "0.00". In the center, there is a text prompt "Select the person to approve this document" followed by a label "Supervisor to Approve" with a red asterisk, a text box, and a dropdown arrow. Below this is an orange banner with the text: "By submitting this Daily Cash Report for approval, I hereby certify that this report is a complete and accurate description of the fees and monies collected." At the very bottom is a dark blue bar containing a white "Save" button, which is pointed to by a pink arrow from the text below, and the instruction "Click on Save, then click on Submit at the top of the window."

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.




The screenshot shows a web form titled "Department Transfer Request" with a tab for "Approval History". The form contains several input fields and buttons. A pink arrow points to the "Retrieve Next Banner Doc Reference" button. The fields are as follows:

Field Label	Field Content
Banner Doc Reference *	[Empty text box]
Document Date	03/31/2018
Transaction Date	[Empty text box]
Purpose and Initiating Department Contact/Explanation	[Section Header]
I want to *	[Empty text box with dropdown arrow]
Initiating Department Explanation *	[Empty text box with scrollbars]

Below the "Initiating Department Explanation" field, there is a checkbox with the text: "Check this box for Help on the Initiating Department Explanation field. Uncheck when done reading."

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



Initial Department * Initiating Department Contact Name *

Finalizing Department * Initiating Department Contact Number *

Preferred Banner Description (35 characters max) *

☐ Check this box for Help on the Preferred Banner Description field. Uncheck when done reading.

Current User's Real Name

- 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

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

Add

Finalizing FOAP Total

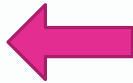
0

Initiating FOAP Total

0

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

Save



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

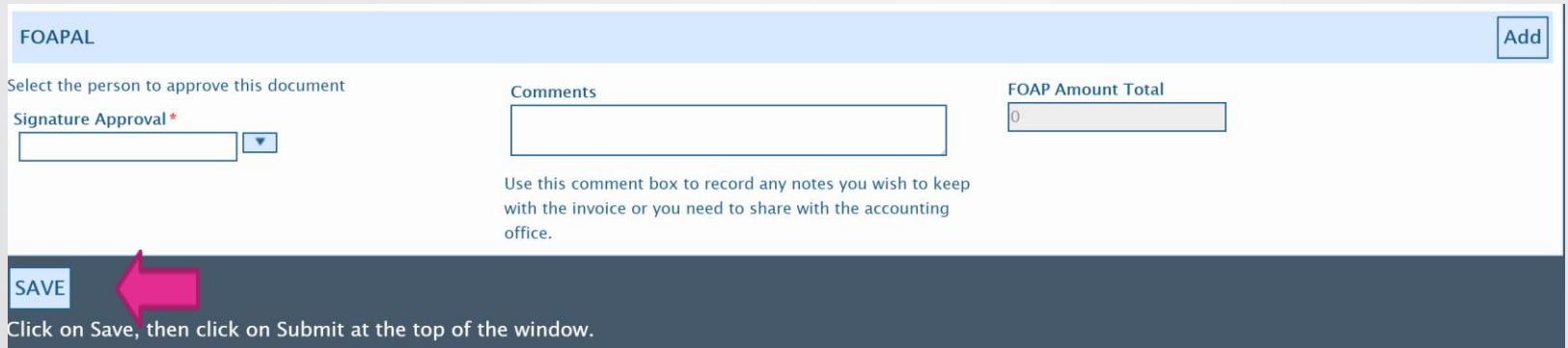
Click on Save, then click on Submit at the top of the window.

Save

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

Department Invoice Voucher		Approval History	
Banner Doc Reference	Vendor Number	Vendor Name	Purchase Order Number
10796131	G00023446	PROJECT WET FOUNDATION	
Department			
ALUMNI RELATIONS			
Invoice Date	Invoice Number	<input type="checkbox"/> Credit Memo	
10/30/2017	12854	Department Amount	
		\$311.14	
The related invoice shows the total amount of the invoice. This is the amount that will be charged to your department.			

- 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.



The screenshot shows a web form titled "FOAPAL" with a light blue header. In the top right corner of the header is a blue "Add" button. Below the header, the form is divided into three main sections. The left section is for "Signature Approval", with a label "Select the person to approve this document" and a text input field followed by a small blue dropdown arrow. The middle section is for "Comments", with a label "Comments" and a large text input field. Below the comments field is a note: "Use this comment box to record any notes you wish to keep with the invoice or you need to share with the accounting office." The right section is for "FOAP Amount Total", with a label "FOAP Amount Total" and a text input field containing the number "0". At the bottom of the form is a dark grey bar containing a blue "SAVE" button on the left. A large pink arrow points from the left towards the "SAVE" button. Below the "SAVE" button, text reads: "Click on Save, then click on Submit at the top of the window."

FOAPAL Add

Select the person to approve this document

Signature Approval* ▼

Comments

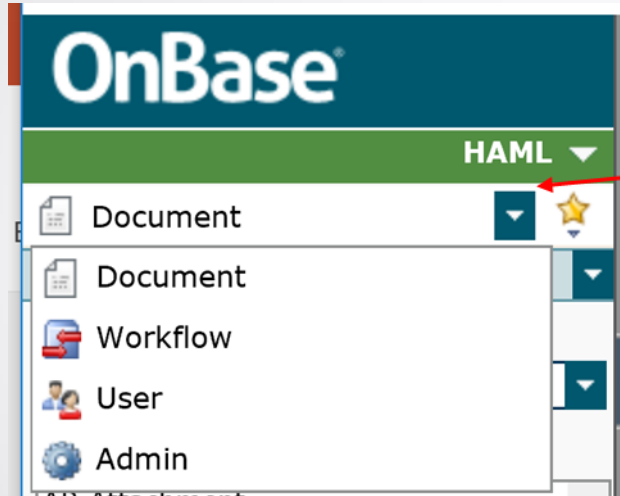
FOAP Amount Total

Use this comment box to record any notes you wish to keep with the invoice or you need to share with the accounting office.

SAVE

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

- 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>



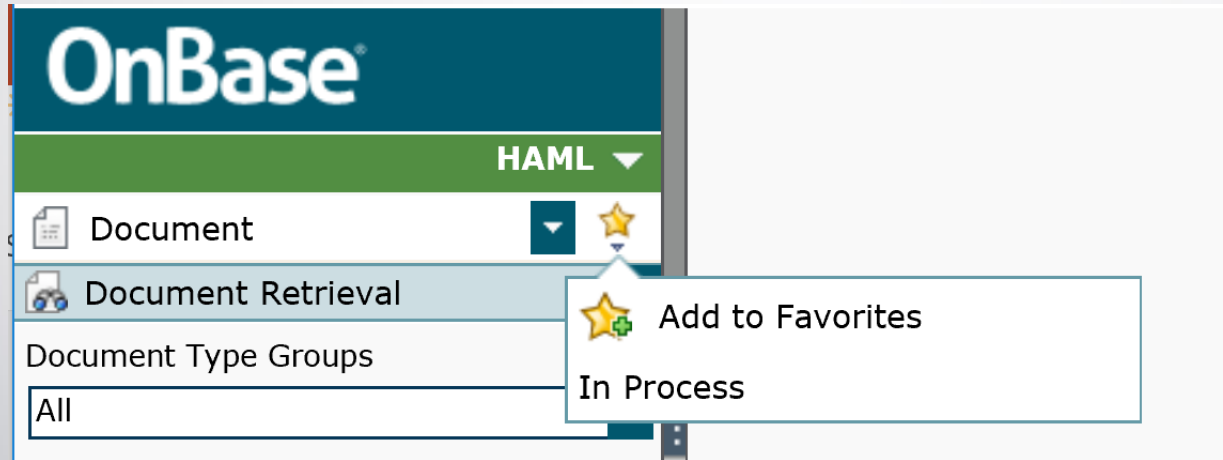
To mark a folder as a favorite, click the star when on the folder and it will show under your favorites. The favorites option is found on the first screen where you do document retrieval.

Add to Favorites ✕

Favorite Name

OK Cancel

- 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



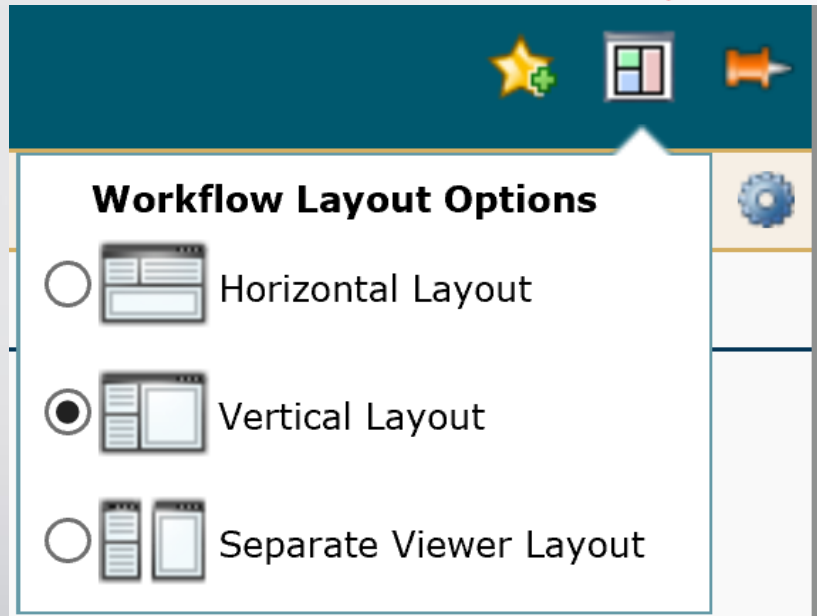
AP Approval

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

Life Cycle View | Work Folder

Combined Inbox

AP Approval

AP Form Completion

In Process

Finalizing Department - Transfer Request

Corrections

TRF - 12521552 - JR000054 - ACES - - 1/18/20181/23/2018 4:47:40 PM

DD - 12521557 - DD000024 - ACES - - - - ACES1/23/2018 4:46:40 PM

CK Req -12536440 - - - - - - ACES3/31/2018 4:16:56 PM

CK Req -12536448 - - - - - - ACES3/31/2018 8:48:11 PM

TRF - 12536452 - - ACES - - 3/31/20183/31/2018 8:48:33 PM

SubmitCancel ItemAdd Attachment

Page 1

Department Check Request

Department Check RequestApproval History

Banner Doc Reference *10796133

Check Request Number884

Department *ACES

Retrieve Next Banner Doc Reference

Vertical Layout

OnBase

Life Cycle View

Work Folder

Combined Inbox

AP Approval

AP Form Completion

In Process

Finalizing Department - Transfer Request

Corrections

Inbox

Name	Entry Date
TRF - 12521552 - JR000054 - AC	1/23/2018 4:47:40 PM
DD - 12521557 - DD000024 - AC	1/23/2018 4:46:40 PM
CK Req -12536440 - - - - -	3/31/2018 4:16:56 PM
CK Req -12536448 - - - - -	3/31/2018 8:48:11 PM
TRF - 12536452 - - ACES - -	3/31/2018 8:48:33 PM

Department Check Request

Approval History

Banner Doc Reference *

10796133

Check Request Number

884

Department *

ACES

Retrieve Next Banner Doc Reference

Check Number

Vendor Section

Vendor Name *

Banner / G# (if known)

Address *



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

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

Inbox without a Filter

Life Cycle View

Work Folder

Combined Inbox

AP Approval

AP Form Completion

In Process

Finalizing Department - Transfer Request

Corrections

TRF - 12521552 - JR000054 - ACES -- 1/18/2018

1/23/2018 4:47:40 PM

DD - 12521557 - DD000024 - ACES - - - ACES

1/23/2018 4:46:40 PM

CK Req -12536440 - - - - - ACES

3/31/2018 4:16:56 PM

CK Req -12536448 - - - - - ACES

3/31/2018 8:48:11 PM

TRF - 12536452 - - ACES - - 3/31/2018

3/31/2018 8:48:33 PM

Submit

Cancel Item

Add Attachment

Page 1

Department Check Request

Department Check Request

Approval History

Banner Doc Reference *

10796133

Check Request Number

884

Department *

ACES

Retrieve Next Banner Doc Reference

Inbox with a Filter

OnBase

Life Cycle View | Work Folder

- Combined Inbox
- AP Approval
- AP Form Completion**
 - In Process**
 - Finalizing Department - Transfer Request
 - Corrections

Inbox

AP Form Type	AP Approver	Venc Invo	Department ▲	Entry Date
DEPARTMENT TRANSFER REQUEST			ACES	1/23/2018 4:47:40 PM
DEPARTMENT DEPOSIT			ACES	1/23/2018 4:46:40 PM
DEPARTMENT CHECK REQUEST			ACES	3/31/2018 4:16:56 PM
DEPARTMENT CHECK REQUEST			ACES	3/31/2018 8:48:11 PM
DEPARTMENT TRANSFER REQUEST			ACES	3/31/2018 8:48:33 PM




Submit Not Mine Deny Cancel Item Add Attachment





TRF – Transfer Request

DD – Department Deposit

CK Req – Department Check Request



DV – Department Invoice Voucher



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Life Cycle View


Work Folder

 AP Approval

 **AP Form Completion**

 **In Process**

 Finalizing Department - Transfer Request

 Corrections


Inbox


Previous Results


Next Results


Options


Documents (8)	Entry Date
TRF - 12521552 - JR000054 - ACES - - 1/18/2018	1/23/2018 4:...
DD - 12521557 - DD000024 - ACES - - - - ACES	1/23/2018 4:...
CK Req -12536440 - - - - - - - ACES	3/31/2018 4:...
CK Req -12536448 - - - - - - - ACES	3/31/2018 8:...
DD - 12536450 - - ACES - - - - ACES	3/31/2018 8:...
TRF - 12536452 - - ACES - - 3/31/2018	3/31/2018 8:...
DV -12536454 - I0796111 - CROP MARKS PRINTING - CR2010505...	4/1/2018 10:...
DV -12536456 - I0796112 - CROP MARKS PRINTING - CR2010592...	4/1/2018 10:...

 Submit

 Not Mine

 Deny

 Cancel Item

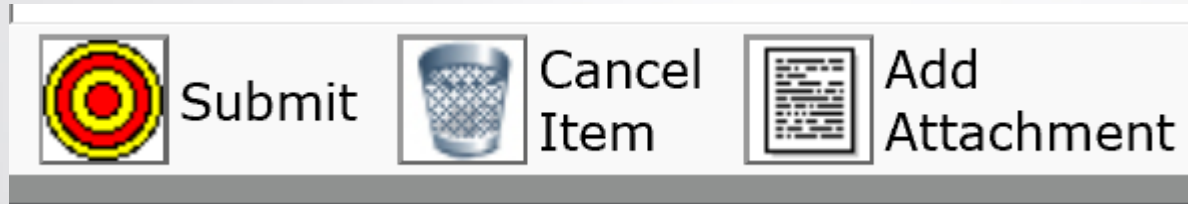
 Add Attachment

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

Inbox




User Interaction






File Path	Keywords
<input type="button" value="Choose File"/> No file chosen	Banner Doc Reference
Document Types	<input type="text" value="I0796132"/>
<input type="text" value="AP-Attachment"/>	Banner Doc Reference
File Type	<input type="text"/>
<input type="text" value="Image File Format (.???)"/>	
<input type="checkbox"/> Initiate Workflow	
Document Date	

Navigation icons: Previous, Import, Undo, Refresh

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


OnBase®











Life Cycle View


Work Folder


 Combined Inbox

 AP Approval

 **AP Form Completion**

 In Process

 **Finalizing Department - Transfer Request**

 Corrections

Inbox

Previous Results


Next Results


Options


Documents (2)

TRF - 12521492 - JR000045 - ADMISSIONS - ACES - 1/16/2018

TRF - 12521495 - JR000047 - ADMISSIONS - ACES - 1/16/2018

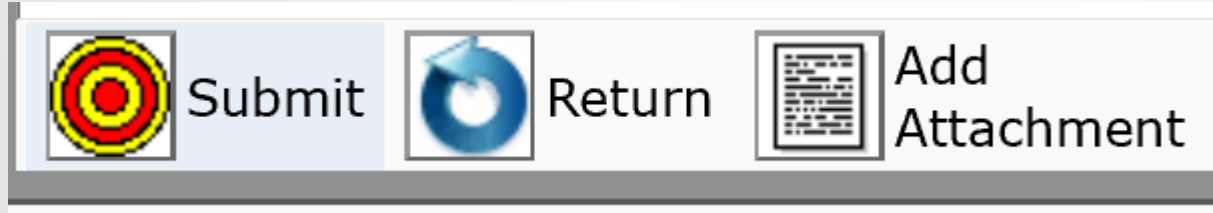
 Submit

 Return

 Add Attachment

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

OnBase

Life Cycle View | **Work Folder**

- Combined Inbox
- AP Approval
- AP Form Completion**
 - In Process
 - Finalizing Department - Transfer Request
 - Corrections**

Inbox

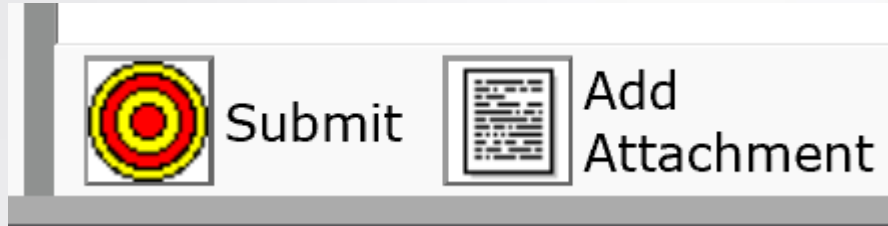
Previous Results | Next Results | Options

Documents (1)

DD - 12521656 - DD000023 - ACES - - \$14.00 - 2/16/2018 - ACES

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 screenshot displays the OnBase software interface. The top header bar is dark blue with the 'OnBase' logo on the left and three icons (a star, a grid, and a pushpin) on the right. Below the header is a navigation bar with a green left arrow, a funnel icon, a grid icon, and a folder icon. The main content area is divided into two sections. The left section, titled 'Life Cycle View', has a tab labeled 'Work Folder'. Below this tab is a 'Portfolios' section with a dropdown menu currently showing 'Attachments'. Underneath the dropdown is a table with a green header row labeled 'Name' and one data row containing the text 'JR000054 - AP-Attachment - 3/31/2018'. The right section is titled 'Inbox' and contains a list of documents. At the top of the 'Inbox' section are links for 'Previous Results', 'Next Results', and 'Options'. Below these links is a header row for 'Documents (3)'. The document list contains three entries: 'TRF - 12521552 - JR000054 - ACES - - 1/18/2018' (highlighted in blue), 'DD - 12521557 - DD000024 - ACES - - - - ACES', and 'CK Req -12536440 - - - - - ACES'.

OnBase

Life Cycle View | Work Folder

Portfolios

Attachments

Name

JR000054 - AP-Attachment - 3/31/2018

Inbox

Previous Results | Next Results | Options

Documents (3)

TRF - 12521552 - JR000054 - ACES - - 1/18/2018

DD - 12521557 - DD000024 - ACES - - - - ACES

CK Req -12536440 - - - - - ACES

- 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.

OnBase

Life Cycle View

Work Folder

Combined Inbox

AP Approval

Needs Approval

Additional Approver

AP Form Completion

In Process

Finalizing Department - Transfer Request

Corrections

Inbox

Previous Results

Next Results

Options

Documents (3)

TRF - 12519922 - JR000007 - ADMISSIONS - ACES - 11/29/2017

TRF - 12521500 - JR000049 - ACES - ADMISSIONS - 1/16/2018

CK Req -12535604 - I0796093 - - BRIAN VAN DOEELAAR - 865 - 3/25/2018 - \$100.00 - - ACES

Approve/Additional Approvers

Return Transfer Request

Not Mine

Deny

Add Attachment

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.

43

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

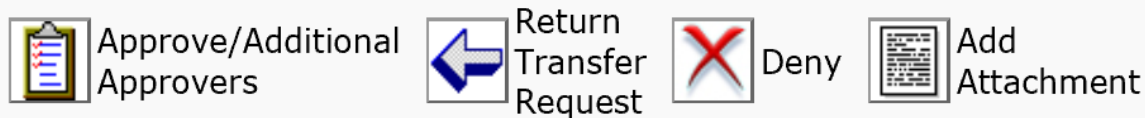
The task bar for a DV and Chk Req have these options



The task bar for a DD has these options



The task bar for a TRF has these options



APPROVE FORM

Inbox

User Interaction

Approve Form

Save

Decision ^{*}

☐ Add Note to Approval

Notes

APPROVE

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

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

TR Queue Assignment

Return To: *

Banner Doc Reference

JR000007

Reason for return: *

Choose either In Process or
Finalizing Department – Transfer Request

Add Attachment

Inbox




User Interaction






File Path	Keywords
<input type="button" value="Choose File"/> No file chosen	Banner Doc Reference
Document Types	<input type="text" value="I0796132"/>
<input type="text" value="AP-Attachment"/>	Banner Doc Reference
File Type	<input type="text"/>
<input type="text" value="Image File Format (.???)"/>	
<input type="checkbox"/> Initiate Workflow	
Document Date	

Navigation icons: Previous, Add, Import, Next

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


OnBase®








Life Cycle View


Work Folder


 Combined Inbox




 **AP Approval**

 Needs Approval

 **Additional Approver**



 AP Form Completion

Inbox

Previous Results


Next Results


Options

Documents (1)

CK Req -12535604 - 10796093 - - BRIAN VAN DOESELAAR - 865 - 3/25/2018 - \$100.00 - - ACES

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

 Approve/Additional Approvers

 Add Attachment

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

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



Approve/Additional
Approvers

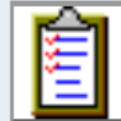


Not
Mine



Add
Attachment

The task bar for a DD has these options



Approve/Additional
Approvers



Add
Attachment

The task bar for a TRF has these options



Approve/Additional
Approvers



Return
Transfer
Request



Add
Attachment

APPROVE FORM

Inbox

User Interaction

Approve Form

Save

Decision ^{*}

▼

☐ Add Note to Approval

Notes

APPROVE

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

TR Queue Assignment

Return To: *

Banner Doc Reference

JR000007

Reason for return: *

Choose either In Process or
Finalizing Department – Transfer Request

Add Attachment

Inbox

User Interaction

File Path	Keywords
<input type="button" value="Choose File"/> No file chosen	Banner Doc Reference
Document Types	<input type="text" value="I0796132"/>
<input type="text" value="AP-Attachment"/>	Banner Doc Reference
File Type	<input type="text"/>
<input type="text" value="Image File Format (.???)"/>	
<input type="checkbox"/> Initiate Workflow	
Document Date	

Navigation icons: Previous, Import, Search, Refresh

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

Notes for DV -12538021 - I0796132 - GINGERMAN RACEWAY - 1500 -10/30/2017 - \$4,500....

Note Type

Comments ▼ Add

Notes

Page #	Date ▼	Note Type	Title	Added By
--------	--------	-----------	-------	----------

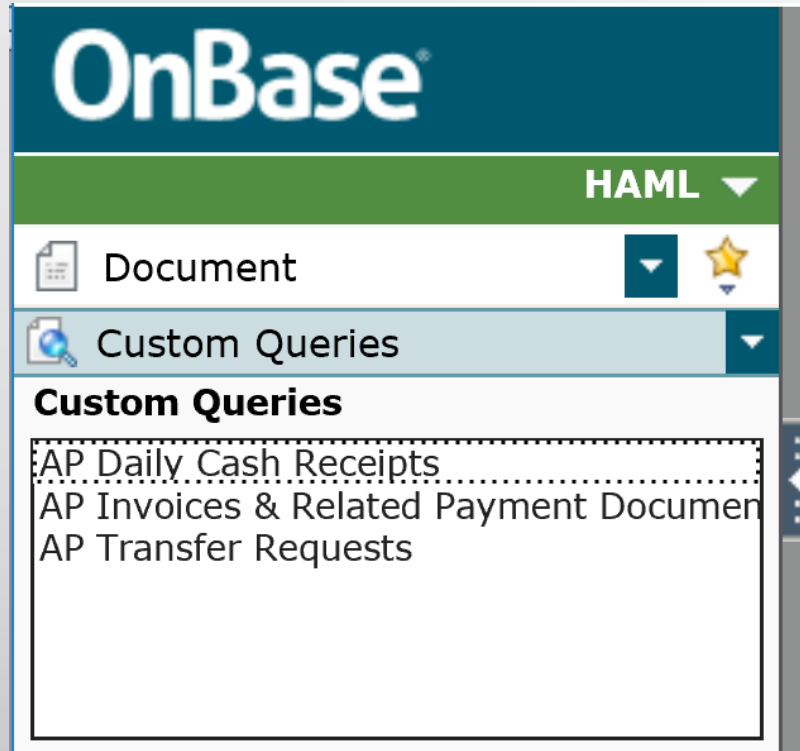
Delete Note

Note Text

Save Save and Close

Close

- To add a note right click on your document
- Select Notes from the popup menu
- Select the type of note from drop down arrow
- 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.

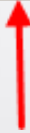
Click this Icon to
start the query or
click the enter key



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



Instructions

Searches both versions of the AP Daily Cash Report

Banner Doc Referen...

Fund

Organization

Account

Program

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

Instructions

Searches AP Invoice, AP Check Request, AP Department Check Request, AP Facilities, AP Facilities Planning, AP Library, AP UBS, AP Unity Invoice

Vendor Name

Banner Doc Referen...

Invoice Number

Invoice Date



MM/dd/yyyy

- 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

Instructions

Searches both versions of the Transfer Request

Banner Doc Referen...

FOAP Amount

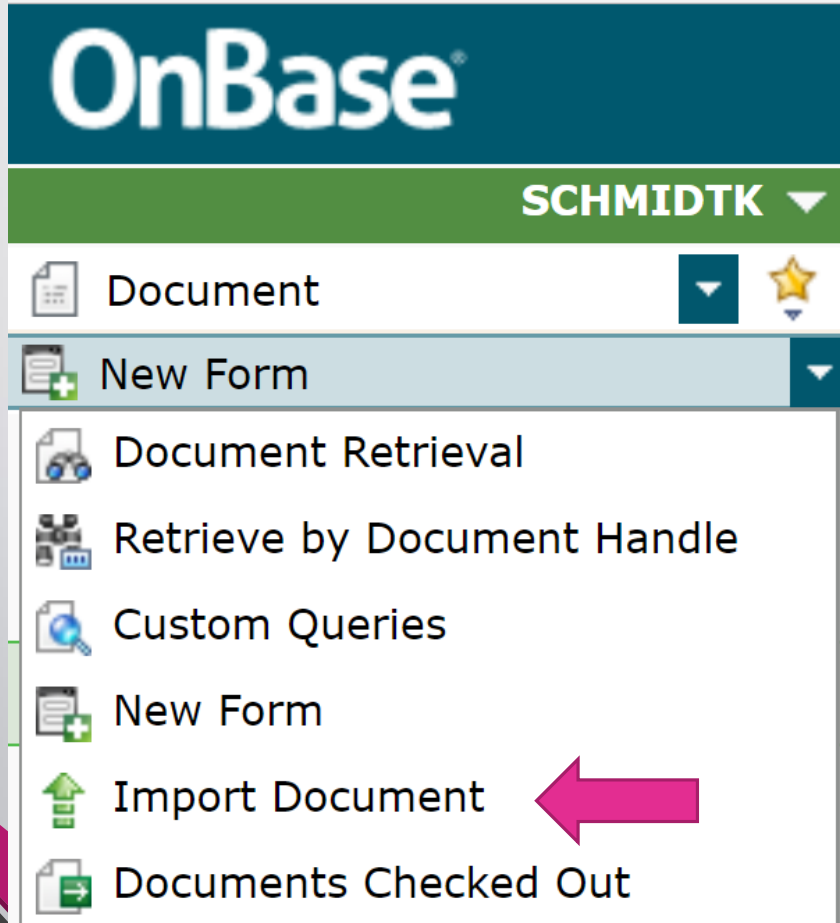
I want to

Initiator

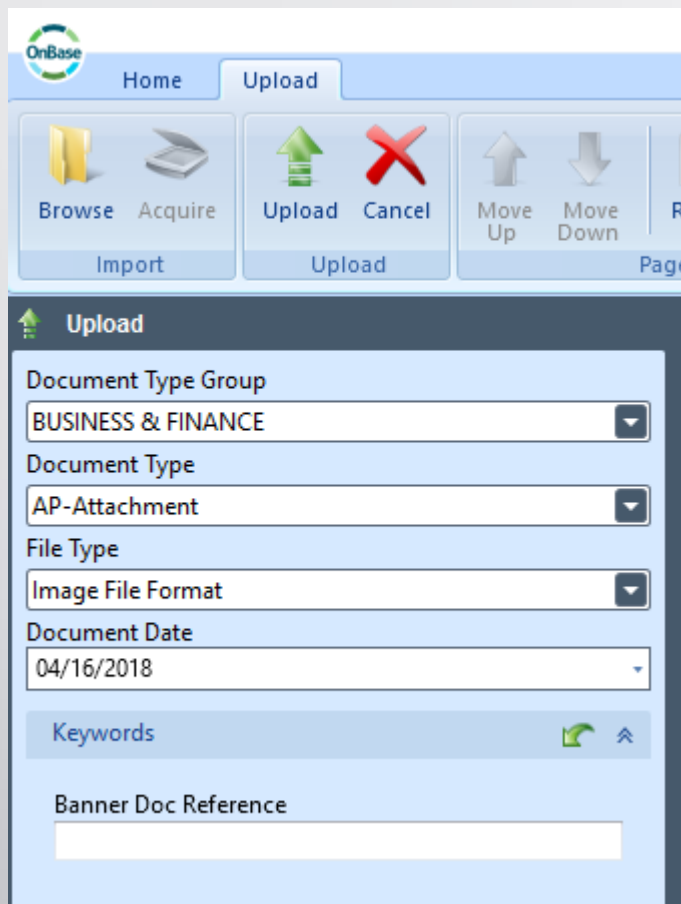
Fund

- 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



The image shows the OnBase 'Upload' interface. At the top, there is a navigation bar with 'Home' and 'Upload' tabs. Below this is a toolbar with buttons for 'Browse' (with a folder icon), 'Acquire' (with a scanner icon), 'Upload' (with a green up arrow), 'Cancel' (with a red X), 'Move Up' (with a grey up arrow), and 'Move Down' (with a grey down arrow). Below the toolbar is a section titled 'Upload' with a green up arrow icon. This section contains several dropdown menus: 'Document Type Group' (set to 'BUSINESS & FINANCE'), 'Document Type' (set to 'AP-Attachment'), 'File Type' (set to 'Image File Format'), and 'Document Date' (set to '04/16/2018'). Below these is a 'Keywords' section with a green up arrow icon and an up arrow icon. At the bottom is a 'Banner Doc Reference' section with a text input field.

OnBase

Home Upload

Browse Acquire Upload Cancel Move Up Move Down

Import Upload Page

Upload

Document Type Group
BUSINESS & FINANCE

Document Type
AP-Attachment

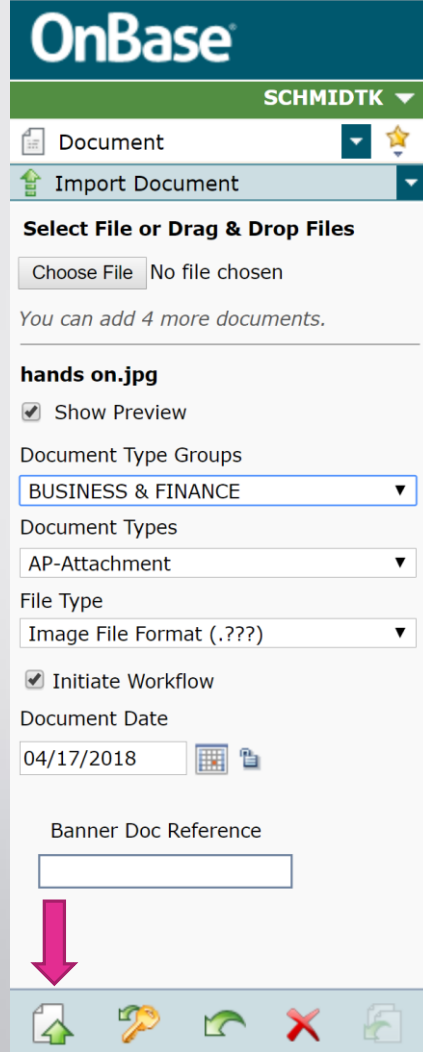
File Type
Image File Format

Document Date
04/16/2018

Keywords

Banner Doc Reference

- 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



The image shows a screenshot of the OnBase web application interface. At the top, the 'OnBase' logo is on the left, and a user profile 'SCHMIDTK' with a dropdown arrow is on the right. Below this is a 'Document' header with a dropdown arrow and a star icon. A green bar with an upload icon and the text 'Import Document' is next. The main section is titled 'Select File or Drag & Drop Files'. It contains a 'Choose File' button, the text 'No file chosen', and a note 'You can add 4 more documents.' Below this, the filename 'hands on.jpg' is shown with a 'Show Preview' checkbox. There are three dropdown menus: 'Document Type Groups' (set to 'BUSINESS & FINANCE'), 'Document Types' (set to 'AP-Attachment'), and 'File Type' (set to 'Image File Format (.???)'). A 'Initiate Workflow' checkbox is checked. The 'Document Date' is set to '04/17/2018' with a calendar icon. A 'Banner Doc Reference' text box is empty. A large pink arrow points down from the text box to the bottom toolbar. The toolbar has five icons: a green upload arrow, a yellow key, a green circular arrow, a red 'X', and a green document icon.

OnBase

SCHMIDTK

Document

Import Document

Select File or Drag & Drop Files

Choose File No file chosen

You can add 4 more documents.

hands on.jpg

Show Preview

Document Type Groups

BUSINESS & FINANCE

Document Types

AP-Attachment

File Type

Image File Format (.???)

Initiate Workflow

Document Date

04/17/2018

Banner Doc Reference

- 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

The image shows a screenshot of the OnBase web application interface. At the top, the 'OnBase' logo is displayed in white on a dark blue background. Below the logo, a green header bar contains the text 'HAML' followed by a downward-pointing arrow. Underneath this, a white bar shows a user profile icon and the text 'User', with a blue square containing a downward arrow and a yellow star icon to its right. A light blue bar below that contains a document icon and the text 'Change Password', also with a downward arrow. The main content area is white and contains the following elements: the text 'User name: HAML', a section titled 'Old Password' with an empty text input field, a section titled 'New Password' with an empty text input field, a section titled 'Verify New Password' with an empty text input field, and a green 'Save' button at the bottom right.

OnBase

HAML ▼

User ▼ ★

Change Password ▼

User name: HAML

Old Password

New Password

Verify New Password


Save

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?