OnBase16 Transfer Request FAQs:

1) My transfer request came back to me and I am not sure why?
2) How can I find a transfer request that is no longer in my Workflow?
3) What is the status of my request?
4) How do I view the attachments on a transfer request?
5) I have completed all of the information on the Initiating Department side, but I can't submit my request, why?
6) My department is both the Initiating and Finalizing side of the request. I have entered the Initiating side information, how do I enter the Finalizing side?
7) How do I cancel a transfer request that is no longer needed?
8) Where can I find additional OnBase Transfer Request Resources?
9) Who do I contact if I have a question about transfer requests that is not answered here?

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1) **My transfer request came back to me and I am not sure why?**

Try looking to see if there are any notes. They are located at the <u>very bottom</u> of your screen, and you can view them by clicking on the Note(s) area circled below. Click on the note in the window that pops up to see the note text.

2) **How can I find a transfer request that is no longer in my Workflow?**

- Look up the transfer in Document Retrieval, under Custom Queries > AP Transfer Requests
- Enter the JRXXXXXX number under Banner Doc Reference

3) What is the status of my transfer request?

You can find the Workflow Queue the request is currently in under the Custom Query search results (see steps in question #2 above for looking up a request in Custom Queries). The below example is in the Finalizing Department queue.

- If the Workflow Queue section is blank, it means it has either fed to Banner already or has been removed/deleted. You can either look in Banner to see if it has posted, or check the document history. To check the history:
 o Right click on the transfer request and select "History"

  o Under History, click on the second tab called "Workflow Queues"
  o If you see "Write Gurfeed File", that means it has posted to Banner

- If the Workflow Queue status is blank, and you do not see "Write Gurfeed File", the request was likely cancelled/removed from the Workflow Life Cycle.

4) How do I view the attachments on a transfer request?

When the transfer request is open, right click in the document and select Cross-References. Then the attachment or a list of the attachments should appear.
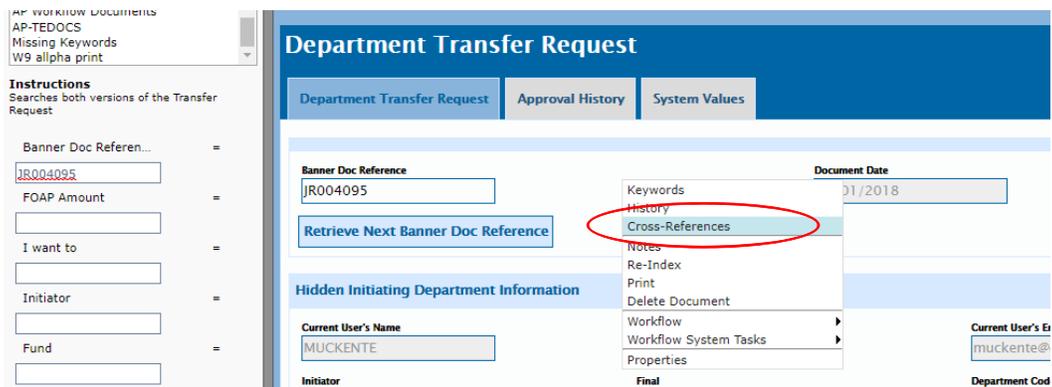
5) I have completed all of the information on the Initiating Department side, but I can't submit my request, why?

Check to see if the Banner Doc Reference field at the top of the request is blank. It is important to click the "Retrieve Next Banner Doc Reference" first before entering any other information, or it can cause problems with submitting. If the Banner Doc Reference that you generated is not saving with the request, contact the Business and Finance Office for assistance.
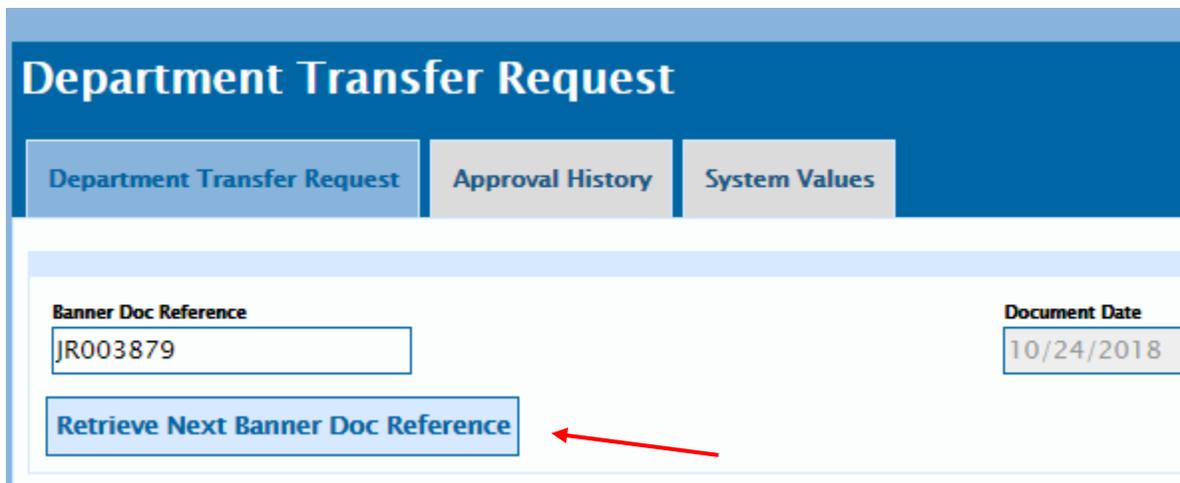
6) My department is both the Initiating and Finalizing side of the request. I have entered the Initiating side information, how do I enter the Finalizing side?

After entering the Initiating Department information in AP Form Completion > In Process, save and submit your request. This will move the request to the AP Form Completion > Transfer Request-Finalizing Department queue. Here you can enter the Finalizing Department information, save and submit it on for approval.

7) How do I cancel a transfer request that is no longer needed?

Transfer requests can be cancelled from Workflow up until the time it is submitted to post to Banner by Accounting. How to cancel it depends on where it is at in the Workflow:

- *Up until the point the request has been submitted to Accounting:* Requests can be cancelled by hitting the "Cancel" button. This can be done in any of the following: In Process, Transfer Request-Finalizing Department, Corrections, Needs Approval, and Additional Approver.

- *After the request has been submitted to Accounting:* Send an email to your accountant with the JR number that you would like cancelled.

8) Where can I find additional OnBase Transfer Request Resources?

- General OnBase Resources
- Department Transfer Request Web User Guide
- AP Approval Web User Guide
- AP Form Completion Web User Guide

9) Who do I contact if I have a question about transfer requests that is not answered here?

You can call your accountant or Terra Muckenthaler (ext. 1-8118)

Transfer Request Life Cycle:

Create New Form → AP Form Completion: In Process → AP Form Completion: Transfer Request-Finalizing Department → AP Approval: Needs Approval (Additional Approver if necessary) → Accounting