



WEB CLIENT AP APPROVAL LIFE CYCLE USER GUIDE

Can be used with the following browsers:
Google Chrome and Mozilla Firefox.

Grand Valley State University

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AP Approval is designed to consolidate all of the accounting office’s forms that need to be approved by GVSU departments. The process is designed to be able to move the form thru multiple people for approval. Onbase will log the user name that clicked the task Approve to check against the approval queues in Banner to see if the user has the appropriate level of signature authority. All of the approvals will be visible on the Approval History tab.

A. AP Approval Life Cycle

Document types processed in this life cycle include, Department Check Requests, Department Deposits, Department Invoice Vouchers and Department Transfer Requests

1. Needs Approval - Folder

All documents will go thru this folder. The approver is expected to review the form and any related documents before approving the form.

a. APPROVE/ADDITIONAL APPROVAL - Task

Select this option if you need this form to be processed by the accounting office. You will see a User Interaction window open with some options to be completed

1. Decision FINAL

If you have the correct level of signature authority required and do not need another person to review the form.

a. Click the drop down box by Decision and choose FINAL

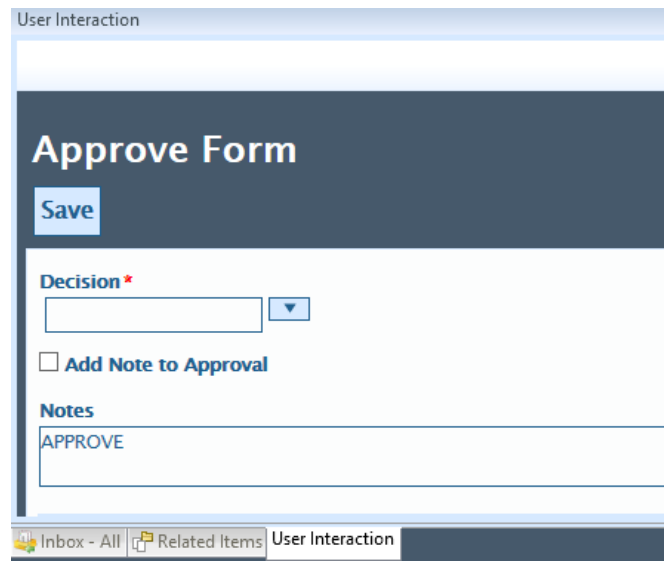
Choose this decision if the user name and FOAPS match the approval queues in Banner. If true, the form will be forwarded on to the accounting office for further processing.

1. Check the box to add a note to the Approval History tab of the form. If the box is not checked the note APPROVE will be added to the Approval History Tab of the form.
2. Click the Save button on the top of the User Interaction window. This will save your decision and move the form to the next step in the process.

2. *Decision APPROVE/ADDITIONAL APPROVER*

Choose this decision if you are approving the form but need another person either to review or another person with higher signature authority to approve the form.

- a. Click the drop down box by Decision and choose APPROVE/ADDITIONAL APPROVER.
 1. Check the box to add a note to the Approval History tab of the form. If the box is not checked the note APPROVE will be added to the Approval History Tab of the form.
 2. Click the drop down arrow on Department to see the list of Departments or start typing the name of the department. The choice of the department will determine the name that the form will be forwarded to.
 3. Click the drop down arrow on Forward To: to select a name from the list.
 4. Click the Save button on the top of the User Interaction window. This will save your decision and move the form to the next step in the process.



- b. NOT OURS -Task

This option is only available when you are working on a Department Voucher –DV.

 - i. Add a note in the User Interaction window.
 - ii. Click the Save Button. The Department Voucher will be returned to the Accounts Payable office for further processing.

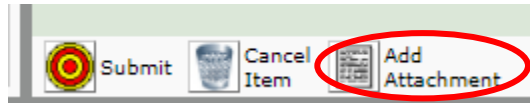
c. DENY - Task

This option is only be available when you have clicked on a Department Voucher or a Department Check Request.

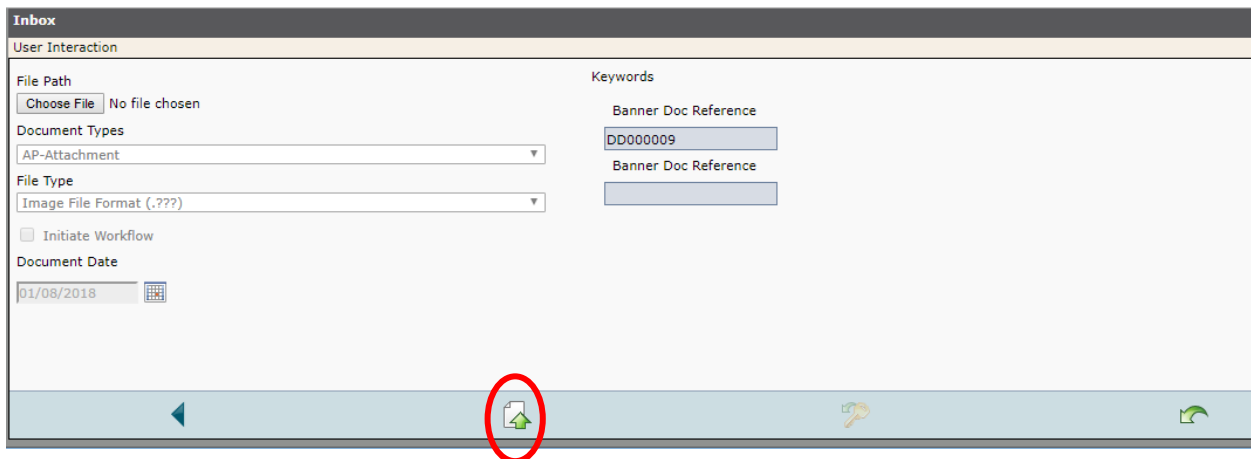
- i. Add a note in the User Interaction window.
- ii. Click the Save Button. The Department Voucher will be returned to the Accounts Payable office for further processing.

d. ADD ATTACHMENTS - Task

a. If there should be supporting information for your form it can be added to Onbase by clicking on the “add attachment” task. This will open a user interaction window that allows you to browse to any file that is saved.



- i. Click the “Choose File” button in the upper left hand corner of the window.
- ii. Browse to the file location for the attachment.
- iii. Locate the file and click “open.”
- iv. Click the “upload” icon



e. RETURN TO INITIATING DEPARTMENT – Task

If the Department Transfer Request needs to be changed and it is on the initiating side choose this option. The form will need to be changed in the AP Form Completion life cycle and then submitted again. The form will go to the Finalizing Department Transfer Request folder in the AP Form completion life cycle. Once completed in that folder the form will go to the AP Approval Life Cycle again.

f. RETRUN TO FINALIZING DEPARTMENT – Task

If the Department Transfer Request needs to be changed and it is on the finalizing side choose this option. The form will need to be changed and then submitted again. The form will go to the AP Approval life cycle for approval again.

2. Additional Approver - Folder

Forms that have been marked as Approved/Additional Approver will be in this folder until the form has been marked FINAL or possibly another task that will remove the form from the life cycle.

a. APPROVE/ADDITIONAL APPROVER - Task

Select this option if you need this form to be processed by the accounting office. You will see a User Interaction window open with some options to be completed

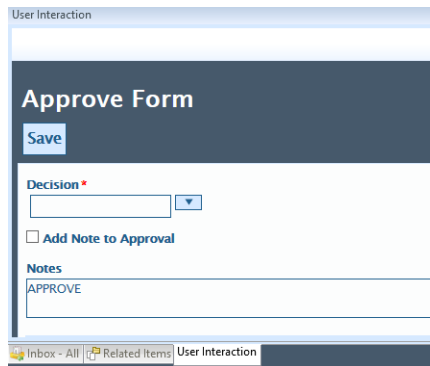
1. *Decision FINAL*

If you have the correct level of signature authority required and do not need another person to review the form.

a. Click the drop down box by Decision and choose FINAL

Choose this decision if the user name and FOAPS match the approval queues in Banner. If true, the form will be forwarded on to the accounting office for further processing.

1. Check the box to add a note to the Approval History tab of the form. If the box is not checked the note APPROVE will be added to the Approval History Tab of the form.
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2. Click the drop down arrow on Department to see the list of Departments or start typing the name of the department. The choice

of the department will determine the name that the form will be forwarded to.

3. Click the drop down arrow on Forward To: to select a name from the list.
4. Click the Save button on the top of the User Interaction window. This will save your decision and move the form to the next step in the process.

The screenshot shows a web application window titled "User Interaction". The main content area has a dark blue header with the text "Approve Form" in white. Below the header is a light blue "Save" button. The form below contains a "Decision" field with a red asterisk and a dropdown arrow, an unchecked checkbox labeled "Add Note to Approval", and a "Notes" section with a text area containing the word "APPROVE". At the bottom of the window, there is a navigation bar with three tabs: "Inbox - All", "Related Items", and "User Interaction".

b. NOT OURS - Task

This option will only be available when you have clicked on a Department Voucher –DV.

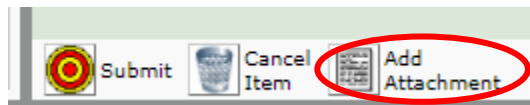
- i. Add a note in the User Interaction window.
- ii. Click the Save Button. The Department Voucher will be returned to the Accounts Payable office for further processing.

c. DENY - Task

This option is only be available when you have clicked on a Department Voucher or a Department Check Request.

- i. Add a note in the User Interaction window.
- ii. Click the Save Button. The Department Voucher will be returned to the Accounts Payable office for further processing.

- d. RETURN TO INITIATING DEPARTMENT – Task
If the Department Transfer Request needs to be changed and it is on the initiating side choose this option. The form will need to be changed in the AP Form Completion life cycle and then submitted again. The form will go to the Finalizing Department Transfer Request folder in the AP Form completion life cycle. Once completed in that folder the form will go to the AP Approval Life Cycle again.
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If the Department Transfer Request needs to be changed and it is on the finalizing side choose this option. The form will need to be changed and then submitted again. The form will go to the AP Approval life cycle for approval again.
- f. ADD ATTACHMENTS - Task
 - a. If there should be supporting information for your form it can be added to OnBase by clicking on the “add attachment” task. This will open a user interaction window that allows you to browse to any file that is saved.



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