

The image shows the OnBase 16 logo, which consists of the text "OnBase" in a bold, teal font, followed by a registered trademark symbol and the number "16" in a smaller, lighter teal font. The logo is positioned to the right of a large, multi-colored arc that resembles a rainbow, with colors including light blue, dark green, brown, pink, purple, and dark blue. The entire graphic is enclosed within a thick, dark purple rectangular border.

OnBase[®]16

**WEB CLIENT
DEPARTMENT PROFILE
USER GUIDE**

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

Grand Valley State University

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Purpose of Department Profile

1. Control of email notifications

The Department Profile is used to control who receives email notifications for work that needs to be done in OnBase Workflow in the lifecycle called AP Form Completion. The department has the ability to control the names of the people who should be notified for each type of document sent from the Accounting Office that requires your department's attention from the Accounting Office. It is possible to have multiple people receive an email notification. It is possible to have different people receive notifications based on the forms that have to be completed.

2. Create new forms from templates

Each department can determine which form types they would like to setup as a template. Each department can determine which FOAP values to add to the templates.

Updating the Department Profile

1. Opening the Department Profile

a. Log into OnBase 16

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

b. Open Document Retrieval

The screenshot shows the OnBase Accounting interface. The 'Document Retrieval' section is active. Under 'Document Type Groups', 'BUSINESS & FINANCE' is selected. The 'Document Types' list includes 'AP-Department Profile', which is highlighted. Below the list are fields for 'From Date', 'To Date', 'Keywords' (with 'Text' and 'Note' tabs), 'Department' (with a dropdown arrow), and 'Department Code'.

Select the Business & Finance from the list of Document Type Groups. Next select from the Document Types AP-Department Profile.

Click on the drop down arrow on the Department keyword. Select your department from the list.

2. Editing the notifications

There are four different documents that the department could be asked to complete. The Department Deposit, Department Check Request, Department Transfer Request and the Department Invoice Voucher will need to have information added to the forms for completion.

Monday thru Friday email reminders will be sent at 10:00am for each document type that is residing in the lifecycle called AP Completion.

The department can decide how many people get an email reminder about each document type. Also, they can setup different email addresses by date range to provide coverage when a person might be away from work for an extended period of time.

a. Click on the document type to edit

| Notification Type | Contact Name | Email | Start Date | End Date | |
|-------------------------|--------------|----------------|------------|------------|--------|
| DEPARTMENT CHECK REQUES | ROXI HOST | HOSTR@GVSU.EDU | 05/01/2018 | 05/01/2030 | Remove |
| DEPARTMENT DEPOSIT | ROXI HOST | HOSTR@GVSU.EDU | 05/01/2018 | 05/01/2030 | Remove |
| DEPARTMENT TRANSFER REQ | ROXI HOST | HOSTR@GVSU.EDU | 05/01/2018 | 05/01/2030 | Remove |

- If the reason to edit is to have a person cover for an absence – click on the document type to edit and change the end date to when the absence will begin. Then click the Add button to add a new row. Select the Notification Type that you are editing. Enter the contact name, enter the start date of when the coverage should begin and enter the end date when it ends. Click the Add button again. Select the Notification Type that you are editing. Enter the name that will be returning and enter the start date and end dates.
- If the reason to edit is to have more people to receive the notification for a document type- click the Add button. Select the document type from the list on the Notification Type. Enter the contact name, the email name, the start date and the end dates. Repeat as needed for as many people that need to receive the notification.

b. Click the Save button

3. Adding default foaps

It is possible to have all or parts of a foap added to a document. Each document type can have its own default foaps. The default foaps added from the department profile can be removed from a document. All of the foap parts can be changed on the department profile at any time as well.

- a. Click the Add button
- b. Click the Form Foapal dropdown arrow
- c. Select the document type to set up the parts of the foap as default
- d. Click the Save button

FOAPAL
Add

| | | | | | |
|--------------------------|----------------|-----------------------|-----------------|----------------|----------|
| Form Foapal DEPARTM ▼ | Fund 110000 | Organization 57105 | Account 7003 | Program 662 | Validate |
| Validation Message | | | | | Remove |
| Form Foapal DEPARTM ▼ | Fund 110000 | Organization 57105 | Account | Program 662 | Validate |
| Validation Message | | | | | Remove |

SAVE