



WEB CLIENT FORM COMPLETION 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 Form Completion is designed to consolidate all of the accounting office's forms that need to be completed by GVSU departments in order to use their budget dollars. The "in process" folder is where new forms departments create or forms the accounting office creates on behalf of the department residing. In this life cycle you will be able to process your departments invoices, transfer requests, check requests and if you have revenues, department deposits. Although each form is unique, the process to complete and approve the transaction to your department's budget is the same for all forms.

A. AP Form Completion Life Cycle

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

1. In Process – Folder

All documents will go through this folder. Required fields marked with a red asterisk will need to be filled in before the document will move to the next step.

a. SUBMIT -Task

Click this option when the form is completed. The document will move to its next step. All of the required fields (marked with a red asterisk) must be completed before the submit task will complete.

b. NOT OURS -Task

This option is only available when you are working on a department voucher –DV.

- i. Click the "not mine" task button.
- ii. Add a note in the user interaction window.
- iii. 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 available when you are working on a department voucher – DV.

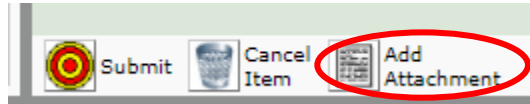
- i. Click the "deny task" button.
- ii. Add a note in the user interaction window.
- iii. Click the save button. The department voucher will be returned to the Accounts Payable office for further processing.

d. CANCEL ITEM -Task

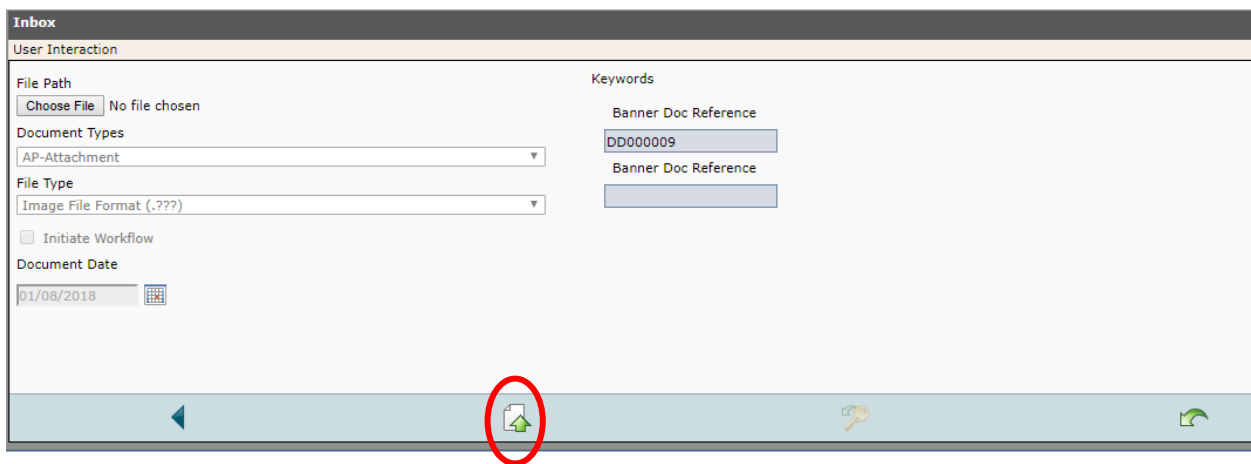
This option is available for: Department Deposit, Department Check Request & the Department Transfer Request. Click this task if you do not want to complete the form.

e. ADD ATTACHMENT -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



2. Transfer Request-Finalizing Department - Folder

Only Department transfer requests will be completed in this folder.

a. SUBMIT - Task

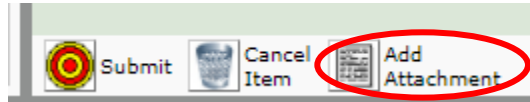
Click this option when the form is completed. The document will move to its next step. All of the required fields (marked with a red asterisk) must be completed before the submit task will complete.

b. RETURN - Task

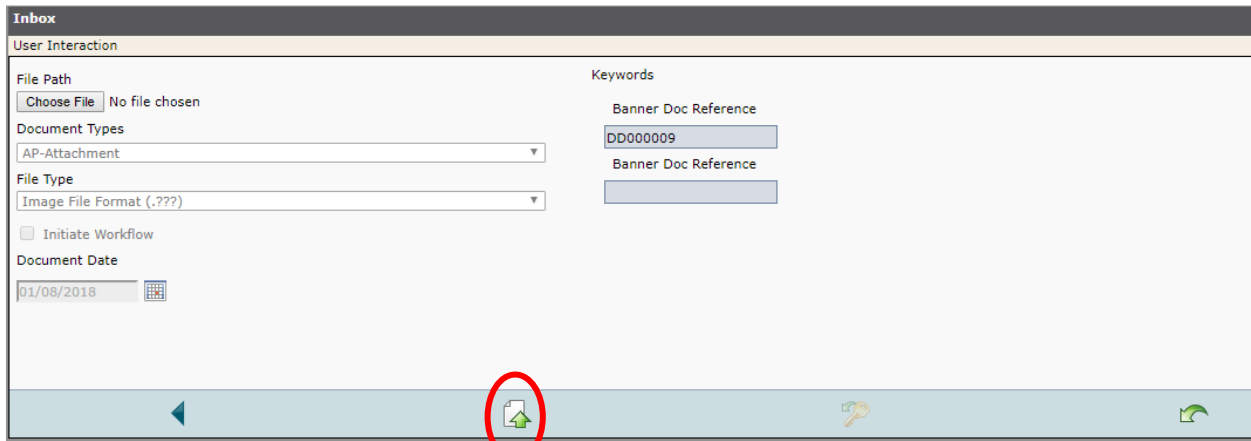
Click this option if you need the department transfer request to be returned to the “in process” folder and the initial department will have to make corrections and return to the finalizing department.

c. ADD ATTACHMENT - Task

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.



- v. Click the “Choose File” button in the upper left hand corner of the window.
- vi. Browse to the file location for the attachment.
- vii. Locate the file and click “open.”
- viii. Click the “upload” icon



- i. The user interaction window will display the document chosen. If correct, click the “upload” button in the lower left of the window.

3. Corrections - Folder

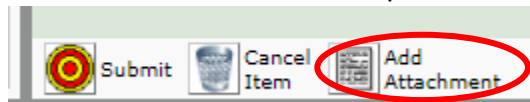
Forms that do not have valid FOAP’s will enter the folder.

a. SUBMIT - Task

Click this option when the form is completed. The document will move to its next step. All of the required fields (marked with a red asterisk) must be completed before the Submit task will complete.

b. ADD ATTACHMENT - Task

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.



- ix. Click the “Choose File” button in the upper left hand corner of the window.
- x. Browse to the file location for the attachment.
- xi. Locate the file and click “open.”
- xii. Click the “upload” icon

The screenshot shows a web client form titled "Inbox" with a "User Interaction" section. The form contains several input fields and buttons:

- File Path:** A "Choose File" button and the text "No file chosen".
- Document Types:** A dropdown menu with "AP-Attachment" selected.
- File Type:** A dropdown menu with "Image File Format (.???)".
- Keywords:** Two "Banner Doc Reference" input fields, one containing "DD000009".
- Initiate Workflow:** An unchecked checkbox.
- Document Date:** A date input field with "01/08/2018" and a calendar icon.

At the bottom of the form, there is a light blue bar containing navigation icons: a left arrow, a red circle around an upload icon (a document with a green arrow), a search icon, and a right arrow.