

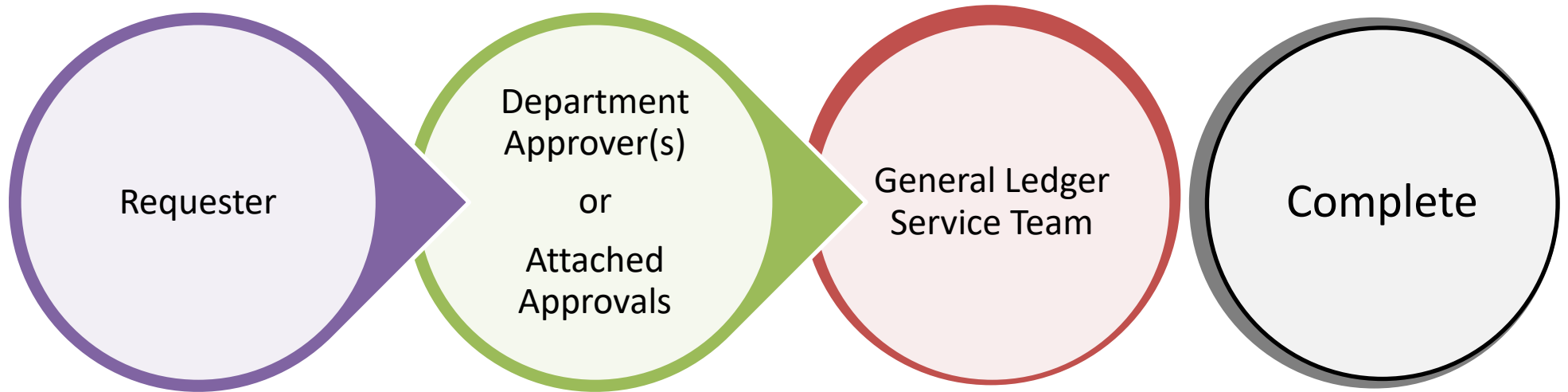


UNIVERSITY OF  
**LOUISVILLE**®

Department Journal Request Form  
OnBase Process



# Process Flow





**Requester**

- Completes Form
- Attaches Journal Information
- Submits Request
- Receives Email Notification



Requester

- Complete Form by Web Link  
or
- Use Unity Client to Access Form



Requester

# Initial Form View

Department General Ledger

<p><b>Journal Voucher Type *</b> <input type="text" value=""/></p> <p><b>Source Code</b> <input type="text" value=""/></p> <p><b>Journal Credit *</b> <input type="text" value=""/></p> <p><b>Journal Debit *</b> <input type="text" value=""/></p> <p><b>Month To Be Posted *</b> <input type="text" value=""/></p> <p><b>Memo</b> <input style="width: 100%; height: 20px;" type="text"/></p>	<p><b>Status</b> <input type="text" value="NEW"/></p> <p><b>Request #</b> <input type="text" value="7759"/></p> <p><b>Request Date</b> <input type="text" value="04/21/2021 03:39:26 PM"/></p> <p><b>Master Request Number</b> <input type="text" value=""/></p>
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**List Approver(s)**

<b>Department Approver Information</b>	<b>First</b>
<b>Last</b>	<input type="text" value=""/>
<b>Middle</b>	<b>Email</b>
<input type="text" value=""/>	<input type="text" value=""/>
<b>Department</b>	<b>Userid</b>
<input type="text" value=""/>	<input type="text" value=""/>

\* Are Required Fields

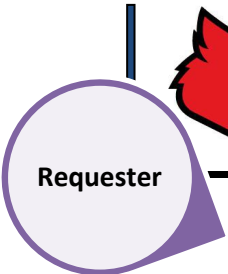
Request Status

OnBase Assigns Unique R

Request Date

Master Request Number (when it is assigned)

Approver information will be required for departments to complete



## Initial Form View

### Documentation Section

How will you document approval(s) for this request? \*

### Supporting Documents

<h4>JV Spreadsheet (ONLY 1 Per Form) (0)</h4> <p>CTL - JV Spreadsheet *</p> <input type="button" value="CTL - JV Spreadsheet"/>	<h4>JV Backup Documentation (invoice, emails, financial spreadsheets, etc.) (0)</h4> <p>JV Backup Docs</p> <input type="button" value="JV Backup Docs"/>
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### Department Section

If you want to copy a service account enter email address.

Service Account Email

<b>Prepared By</b>	<b>Email</b>
UserID <input type="text"/>	<input type="text"/>
First Name <input type="text"/>	Department <input type="text"/>
Middle Name <input type="text"/>	Department ID <input type="text"/>
Last Name * <input type="text"/>	

Drop down menu for selection

Information about you populates automatically



Requester

# Enter Critical Initial Information



## Department General Ledger

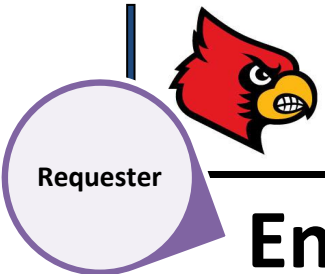
Journal Voucher Type \*

← Select Journal Type  
(from dropdown)

Source Code

Status

Request #



# Enter Critical Initial Information

**Journal Credit \***

← Enter Amount of Credit and Debit  
(will be formatted in currency –  
when form is submitted)

**Journal Debit \***

**Month To Be Posted \***

← Date for journal be posted as of

**Memo**

← Description that follows journal  
through OnBase

**Request Date**

**Master Request Number**

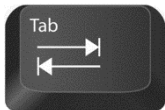




Requester

# Enter Approver Information

Enter Last Name &



information will populate

**List Approver(s)**

Department Approver Information

Last: ANDERSEN

Middle: ANDREW

Department: IT SERVICES

First: BRADFORD

Email: BAANDE03@LOUISVILLE.EDU

Userid: BAANDE03

Department Approver Information

Last:

Middle:

Department:

First:

Email:

Userid:

If approver last name has more than one at the University. You will need to select the correct one from the list.

**Master Request Number**

Select Keyset

ANDERSEN	CHRISTOPHER	GARY	CGANDE03@LOUISVILLE.EDU	FIN AID OPERATING	CGANDE03	Select
ANDERSEN	BRADFORD	ANDREW	BAANDE03@LOUISVILLE.EDU	IT SERVICES	BAANDE03	Select

Cancel

**List Approver(s)**

Department Approver Information

Last: Andersen

Middle:

Department:

Department Approver Information

Last:

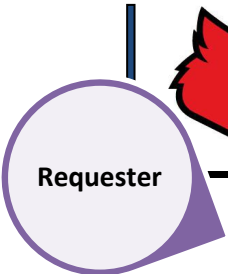
Middle:

Department:

First:

Email:

Userid:



# How will you document approval(s) for this request?

**Documentation Section**

How will you document approval(s) for this request? \*

**Supporting Documents**

<p><b>JV Spreadsheet (ONLY 1 Per Form) (0)</b></p> <p>CTL - JV Spreadsheet *</p> <p><b>CTL - JV Spreadsheet</b></p>	<p><b>JV Backup Documentation (invoice, emails, financial spreadsheets, etc.) (0)</b></p> <p>JV Backup Docs</p> <p><b>JV Backup Docs</b></p>
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Choose from  
the two  
options



Requester

# Attach Documents

1

Select Attach Button

**Documentation Section**

How will you document approval(s) for this request? \*

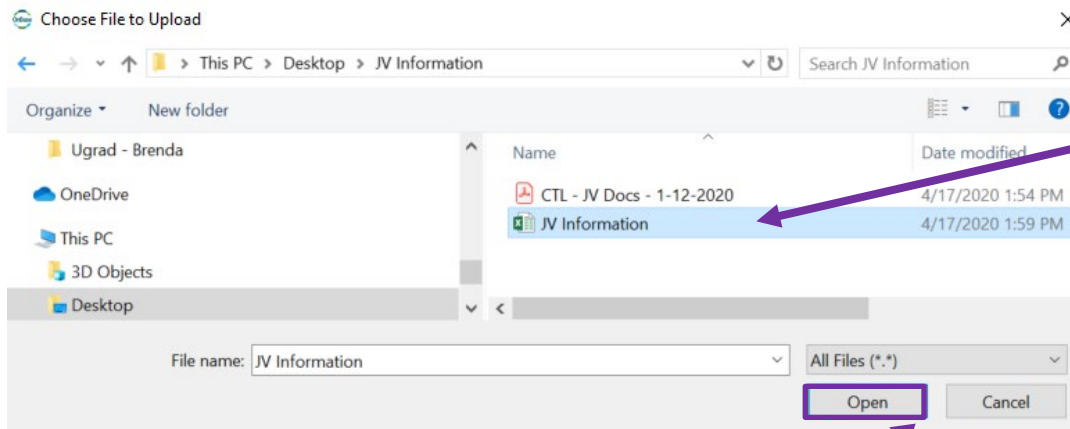
I will use this form with listed approvers and workflow to capture the approval.

Supporting Documents

<b>Journal Voucher Spreadsheet</b> JV Spreadsheet (ONLY 1 Per Form) JV Spreadsheet	<b>Backup Documentation (invoice, emails, financial spreadsheets, etc.)</b> JV Backup Documentation <b>Attach JV Backup Documentation</b>
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2

Select Document to Attach



3

Select Open



Requester

# Department Requester Information

1

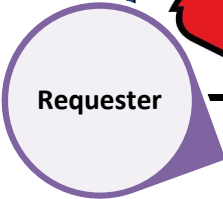
Information about you populates automatically

Department Section	
Prepared By	
<b>UserID</b> SLROAR01	<b>Email</b> SLROAR01@LOUISVILLE.EDU
<b>First Name</b> SHERRY	<b>Department</b> IT SERVICES
<b>Middle Name</b> LYNN	<b>Department ID</b> 2090000156
<b>Last Name</b> ROARK	

**Submit**

2

Select submit to complete process



# Confirmation Email

Wed 4/21/2021 1:22 PM  
 GLSystem@louisville.edu  
 JOURNAL ENTRY (1 APPROVER) - Request # 7744 (Credit) ← **2** Request #  
 To: Cecil, Andrew T  
 Request 7744 - CECIL - JOURNAL ENTRY (1 APPROVER) - Credit - 100.00.tif ← **3** Form Attached  
 281 KB  
[Bing Maps](#)



Information About The Request In Email

Dear ANDREW CECIL,  
 JOURNAL ENTRY (1 APPROVER) Request # 7744 requested 4/21/2021 12:49:18 PM has been forwarded to the approver.

TRAINING EXAMPLE

Attached is a copy for your records.

Thank You,

General Ledger Service Team  
 University Accounting  
 University of Louisville  
 2215 S. Brook Street, Louisville, KY 40292  
 502-852-6267



If multiple approvers then email is sent to second approver



**Department  
Approver**

- Receive Email
- Selects Link in Email
- Reviews Form
  - (selects one of the below options)*
  - Approved
  - Not Approved



Department Approver



# You've Got Mail!

Reply Reply All Forward IM



Wed 4/21/2021 1:22 PM

GLSystem@louisville.edu

JOURNAL ENTRY (1 APPROVER)- Request # 7744 (Requested By ANDREW CECIL)

To Woods, Danielle Nicole

Bing Maps

Dear DANIELLE WOODS,

ANDREW CECIL has submitted JOURNAL ENTRY (1 APPROVER) Request # 7744 for your approval.

TRAINING EXAMPLE

Use this link to Approve or Deny the request.

<https://onbase.louisville.edu/onbase/Workflow/WFLogin.aspx?LifeCycleID=223&QueueID=943>

Thank You,

General Ledger Service Team

University Accounting

University of Louisville

2215 S. Brook Street, Louisville, KY 40292

502-852-6267

1

Request # And Requested By Information In Subject

2

Link to Access Form

3

Login to Access Form

OnBase<sup>17</sup>

AD.LOUISVILLE.EDU

User name

Password

Login



Department  
Approver

# Approval Window

The screenshot displays the OnBase Workflow interface. The browser address bar shows the URL: <https://onbaseuser.louisville.edu/onbase/Workflow/WorkflowMain.aspx>. The interface includes a navigation pane on the left with a tree view under "request" containing "CTL - Journal Entry", "Initial (0)", "Department Approval (1) (1)", and "Department". The main area is titled "Inbox" and contains a table with one row: "Request#54 - ROARK - EXPENSE TRANSFER (IUT) - Credit". Below the table, there are action buttons: "Approved" (checked), "Not Approved", and "Add Comment (1)". A green callout box with the number "1" highlights the "Approved" button, and a label "Workflow Actions" points to it.





General  
Ledger  
Service Team

- Receives Notification
- Reviews
- Assigns Voucher Number



Complete

# Voucher Number Assigned Confirmation

Reply Reply All Forward IM



Wed 4/7/2021 4:36 PM

GLSystem@louisville.edu

JOURNAL ENTRY (1 APPROVER) - Request # 7388 (Voucher # 0001537874)

To Cecil, Andrew T



Request 7388 - CECIL - JOURNAL ENTRY (1 APPROVER) - Credit - 6,773.65.tif  
296 KB

[Bing Maps](#)

Dear ANDREW CECIL,

JOURNAL ENTRY (1 APPROVER) Request # 7388 requested 4/7/2021 4:33:07 PM has been posted to Journal # 0001537874.

Attached is a copy for your records.

Thank You,

General Ledger Service Team

University Accounting

University of Louisville

2215 S. Brook Street, Louisville, KY 40292

502-852-6267