

Update and Approval of Internal Transaction eForms

This document provides guidance on completing the approval for LSUHSC Internal Transaction forms.

1. The approvers for a department requesting/receiving the goods or services from another department receives an email from the generalaccounting@lsuhsc.edu email address indicating that there is a form for review and approval.

From: PS Financials Development <psfindev@lsuhsc.edu>
Sent: Monday, May 20, 2024 10:08 AM
To: Lovell, B.J. <BLovell@lsuhsc.edu>; Sanford, Clayton H. <csanf4@lsuhsc.edu>; Bonura, Karen <kbonur@lsuhsc.edu>; Gonzales, Michele S. <mgonza@lsuhsc.edu>; Liu, Shiyong <SLiu1@lsuhsc.edu>; Williams, Tlesia M. <twil11@lsuhsc.edu>
Subject: LSUNO Internal Transaction Form 10335 is Pending Dept Approval

You have an internal transaction request to evaluate. You may follow the link below to approve it.
 eForm ID: 10335
 Request Date: 2024-01-16
 From Department: Surgery
 To Department: Center-Cancer
 Invoice: CIAIM-3999192; Amount: 120

Link to Update the IT eForm: https://rcbb.psf.lsuhsc.edu/psp/fstst/EMPLOYEE/ERP/c/G3FRAME.G3SEARCH_FL.GBL?Page=G3SEARCH_FL&Action=U&G3FORM_ID=10335&G3FORM_TASK=UPD
 Link to Approve IT eForm: https://rcbb.psf.lsuhsc.edu/psp/fstst/EMPLOYEE/ERP/c/G3FRAME.G3SEARCH_FL.GBL?Page=G3SEARCH_FL&Action=U&G3FORM_ID=10335&G3FORM_TASK=EVL

To enter information and review

[Reply](#) [Reply all](#) [Forward](#)

2. The email contains the eForm ID, date, "From" Department (the Initiator), "To" department (the Approver), and the invoice provided by the From Department. There are 2 links at the bottom of the email; the Update an IT eForm link and the Evaluate/Approve a IT eForm link. To review the form and complete data entry for the chartstring information as well as add any comments and attachments, select the Link to Update the IT eForm.

Link to Update the IT eForm: https://rcbb.psf.lsuhsc.edu/psp/fstst/EMPLOYEE/ERP/c/G3FRAME.G3SEARCH_FL.GBL?Page=G3SEARCH_FL&Action=U&G3FORM_ID=10335&G3FORM_TASK=UPD

3. The form displays. Review the data entered by the Initiator. Enter any information needed to complete the form. Typically, this will include the chartstring information and additional comments to document.

INTERNAL TRANSACTION - SERVICE OR PRODUCT REQUESTED

*Quantity	Description	*Unit Cost	Amount	Insert A Row	Delete A Row
1	2.00 Partial entry example - Specialty Items provided to accounting from PS Support	100.00	200.00	+	-

Total Amount 200.00

DEPARTMENT PROVIDING SERVICE OR MATERIAL (RECEIVES CREDIT)

*Business Unit: LSUNO
 *From DEPTID: 1673200 Peoplesoft Admin Support Org
 *Requested by: MGONZA Gonzales, Michele S
 Invoice: ITpartial_example

*Date: 07/11/2023
 From Department: Peoplesoft Admin Support Org

I confirm services/products have been rendered satisfactorily. I further certify that the information is accurate and approve this Internal Transaction for further processing Yes

CREDIT

*SpeedType Key	*Account	Fund Code	Department	Program Code	Class Field	Project	*Amount	Comment	Insert A Row	Delete A Row
1	5673200001	546700	113 1673200	54000	90110	5673200001	200.00	Products provided by PS Support to Accounting	+	-

- At the bottom of the form, there is also an option to add additional documents. This is helpful to document the PI approval of the transaction or provide support for the IT. After entering comments and adding any desired attachments, select the Resubmit button at the bottom of the eForm.

- The user then sees the results page.

Current Date Time	Step Title	User ID	Description	Form Action	Time Elapsed
07/11/2023 12:59:41PM	Initiated	MGONZA	Gonzales, Michele S	Submit	
07/12/2023 7:28:35AM	Resubmitted	MGONZA	Gonzales, Michele S	Resubmit	18 hours 28 minutes

- To approve the eForm, the user has 2 navigation options. The user can select the Evaluate a GL Form eForm menu option that appears on the left side of the results page. Or, the user could go back to the email they received and select the link to “Evaluate and Approve” the eForm.

A. Option from menu navigation:

B. Option from Evaluate an eForm link in the email

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To approve

Reply Reply all Forward

- After selecting the navigation or the link to approve the eForm, the eForm opens in display only mode. Scroll through the form to review the data. Enter comments and select Approve.

3	5497400044	547200	113	1497400	10001	55200	5497400044	37.50	CIIM(CIMC)-MD-1905-49293498-BD	+	-
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File Attachments

Attachments required if the Item Description does not *clearly* identify products/services provided.

Status	Action	Description	File Name	Delete
1	Upload			Delete

Add

Comments

Approving the eForm for documentation

*** Keegan, John
 ** Wed, Feb 7 24, 01:08:08 PM

Search Deny Recycle Hold Print **Approve**

Definitions for each of the buttons above follows.

- Approve** – Approve the Internal Transaction to move the form to the General Accounting team.
- Deny** – This is a hard NO. If the Internal Transaction is denied, the initiator is notified that the transaction was denied. If the form needs to be resubmitted, the initiator must start from scratch and create a new one.
- Recycle** – Recycle means that the approver is sending the form back to the initiator to make changes to it. The initiator is notified via email. The initiator must then Update the form and resubmit it to workflow.
- Hold** – Hold may be used by an approver if the user wants to discuss with others and prevent the internal transaction from being processed until he/she is ready. The primary reason for the Hold option is that the General Accounting (GA) team uses the feature in the later stage to prepare the data for journal entry.

- **Search** – Search allows the user to search through the Internal Transaction forms on the system.
- **Print** – This button allows the user to print the form data.

8. After selecting the Approve button, the user sees a message like the below.

Evaluate Internal Transaction : Result

You have successfully approved your eForm.
The eForm has been routed to the next approval step.
multiple approvers.

[View Approval Route \(Add Ad Hoc Approver\)](#)

Transaction / Signature Log

	Current Date Time	Step Title	User ID	Description	Form Action
1	05/30/2023 11:01:01AM	Initiated	MGONZA	Gonzales, Michele S	Submit
2	05/31/2023 9:11:48AM	GL_IT_FROM_DEPT_APPROVER	SLIU1	Liu, Shiyong	Approve

[Refresh Log](#)

[Print](#)

9. The form is approved and General Accounting is notified via system email that there is a form for review and processing. GA will complete the journal entry process and then update the eForm with the journal information. General Accounting then marks executes the form. The IT eForm journal will appear in the journal reports the following day.