JV Approval Process Instructions

Overview

JV's route through the approval process using a NextGen form.

1. Users will select approvers from a drop-down menu and the workflow will automatically move the form to the next approver.

2. After all approvals, a notification goes to the SW Controllers Office for Review.

3. Once reviewed it goes to Financial Systems for data entry.

4. After data entry, a confirmation email is sent to the person who started the form with the Banner JV number.

5. Finally, the form is uploaded to OnBase in an overnight process.

The form link is at the Financial Systems Website

Creating a Bookmark NextGen (*optional – almost everything can be done via email*)

The link on the Financial Systems website will take you to the JV form. To see all of the JV forms you have processed, you will need to go to NextGen.
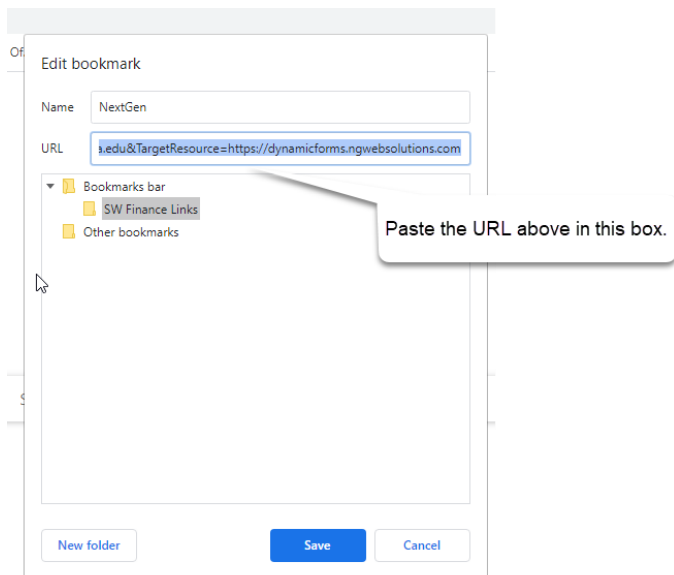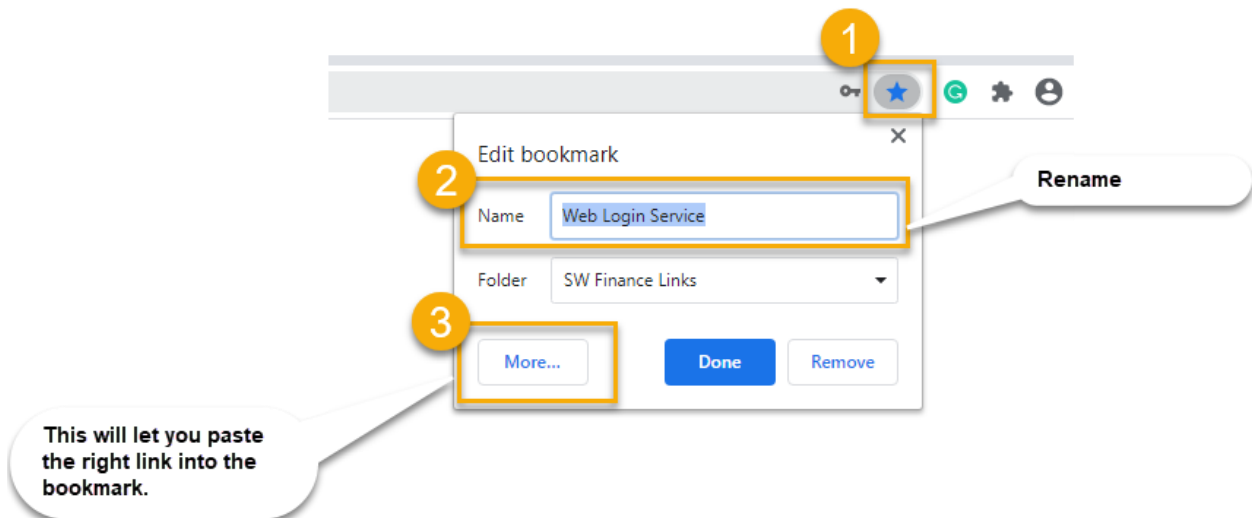
The link is:
https://nextgensso.com/sp/startSSO.ping?PartnerIdpId=urn:mace:incommon:alaska.edu&TargetResource=https://dynamicforms.ngwebsolutions.com
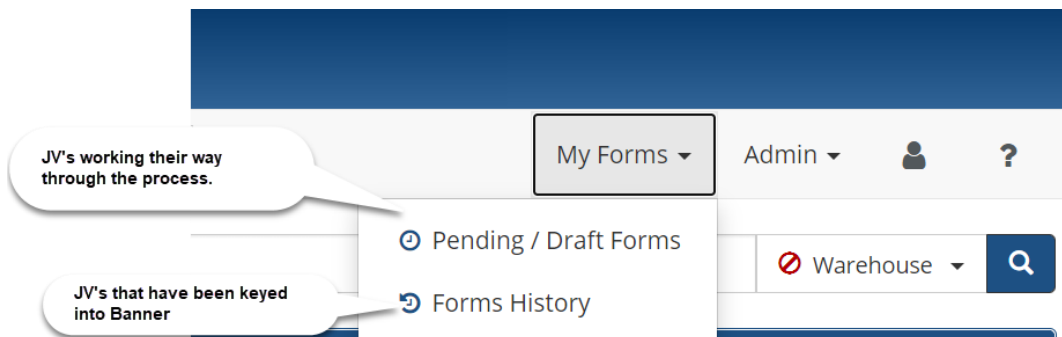
If you would like to put a link in your bookmarks,

1. Go to the NextGen Link above
2. Create a bookmark for NextGen (in Chrome you hit the star)
3. Click More… so you can past the link above in the bookmark.

The bookmark has to be created this way because we use our single sign-on system.

1

Edit bookmark

2 Name: Web Login Service

Rename

Folder: SW Finance Links

3 More...   Done   Remove

This will let you paste the right link into the bookmark.

Edit bookmark

Name: NextGen

URL: s.edu&TargetResource=https://dynamicforms.ngwebsolutions.com

▸ 📁 Bookmarks bar
  📁 SW Finance Links
  📁 Other bookmarks

Paste the URL above in this box.

New folder   Save   Cancel

NextGen keeps track of your forms.

My Forms ▾   Admin ▾   👤   ?

JV's working their way through the process.

⊘ Warehouse ▾   🔍

🕘 Pending / Draft Forms

🔄 Forms History

JV's that have been keyed into Banner

Completing the Form

Initiator – the person who creates the JV

The top section shows the name of the person initiating the form.

Statewide JV Approval - General

UNIVERSITY
of ALASKA
Many Traditions One Alaska

These fields autofill

| Prepared by: | *Cathy | *Ewing | Contact Email: | *clewing@alaska.edu |
| Department Name: | | | Contact Phone: | |

These fields are optional

1. The departmental JV number or description can be the length of a short sentence.
2. Approvers are listed in the dropdown. If you need a different approver, contact UA-Finsys@alaska.edu to update the list to include the new first line approver.
3. JV and Backup are required. The backup field will be set as required in early July 2020, this will give time to those who are putting the JV and backup in a single PDF file to make a transition.

INITIATOR SECTION

The Departmental JV Number is optional and is seen only by you and the approvers. After this JV is entered into Banner, an email with the department JV number or description, and the Banner JV number is sent to you. If the department JV number is blank, you will only receive the Banner JV number in the email.

1

Departmental JV Number or
Description:
(optional)

2

Any combination of letters and numbers. It can be 50+ characters

Choose Approver: * -- Choose -- ▼

Are you uploading an EXCEL file?
Select the PRINT AREA of the JV to ensure all of the information converts to a PDF when uploaded to OnBase.

JV Upload * Choose File | No file chosen   Back Up Upload 1   Choose File | No file chosen
Files over 25 MB will not be accepted   *Files over 25 MB will not be accepted*

3   Back Up Upload 2   Choose File | No file chosen
                                                                         Files over 25 MB will not be accepted

IMPORTANT: If the JV is an excel form (and we encourage that) then you must set the print area
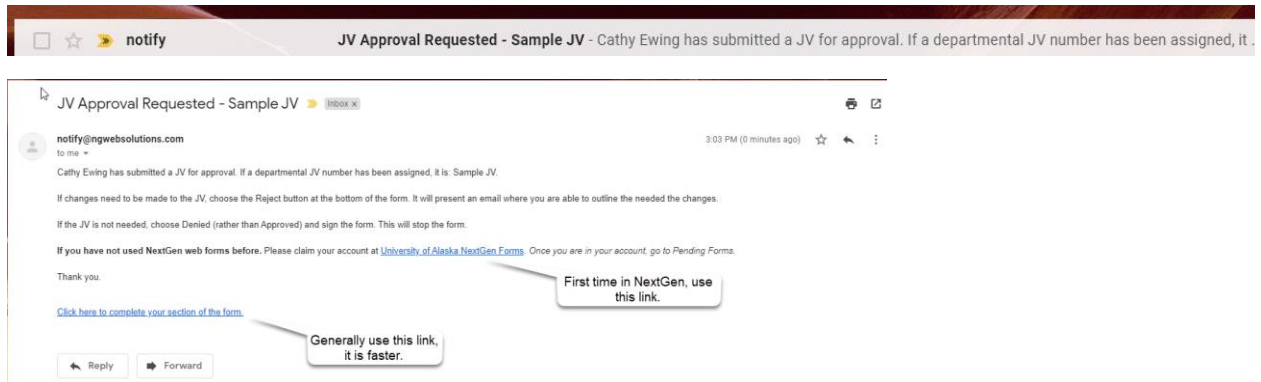
Comments are optional.

4. Click to Sign pops up an electronic signature statement. Type your name exactly as listed and click Sign Electronically
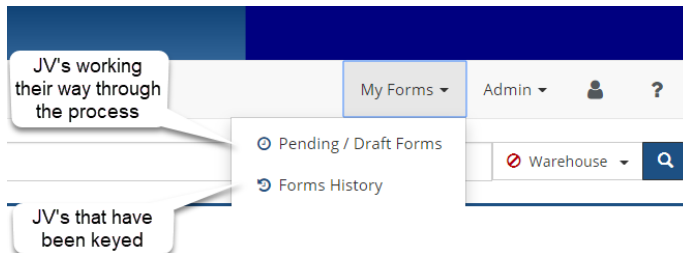

Submit is at the bottom of the form.

Approver

An email with a link to the form you need to approve will come to your email. **Email tells you a form is waiting.**

You can also see your forms waiting for approval in your NextGen account box.

Decision

- Approve – select Approved
- Return for Rework – do not select an answer, go to the bottom of the form and hit Reject.
- Denied and No Longer needed – select Denied, that will stop the forms permanently
- Click the Signature Line

Secondary Approval Required

- The form automatically goes to the SW Controllers Office, however, if you need additional approval click Secondary Approval Required. Use the uausername@alaska.edu for the form (ex: clewing@alaska.edu).
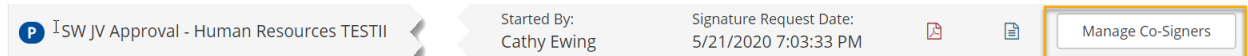

Changing or Reminding Approvers

You can change the approver or send a reminder email from your NextGen account.

1. Log into NextGen
2. Select Pending/Draft Forms
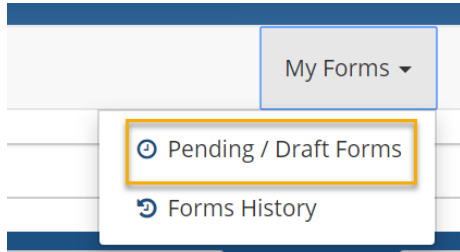
If the form says Manage Co-Signers, you can change the co-signer.

Data Entry

After Data Entry, an email goes to the initiator with the JV Number included.