

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.

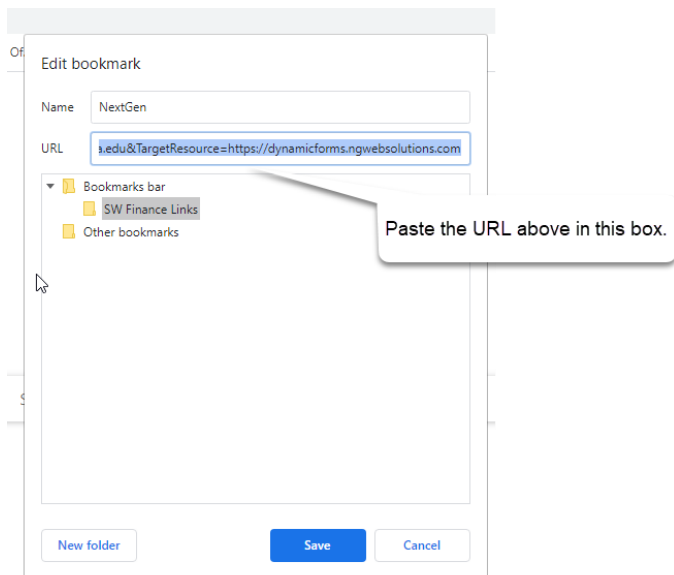
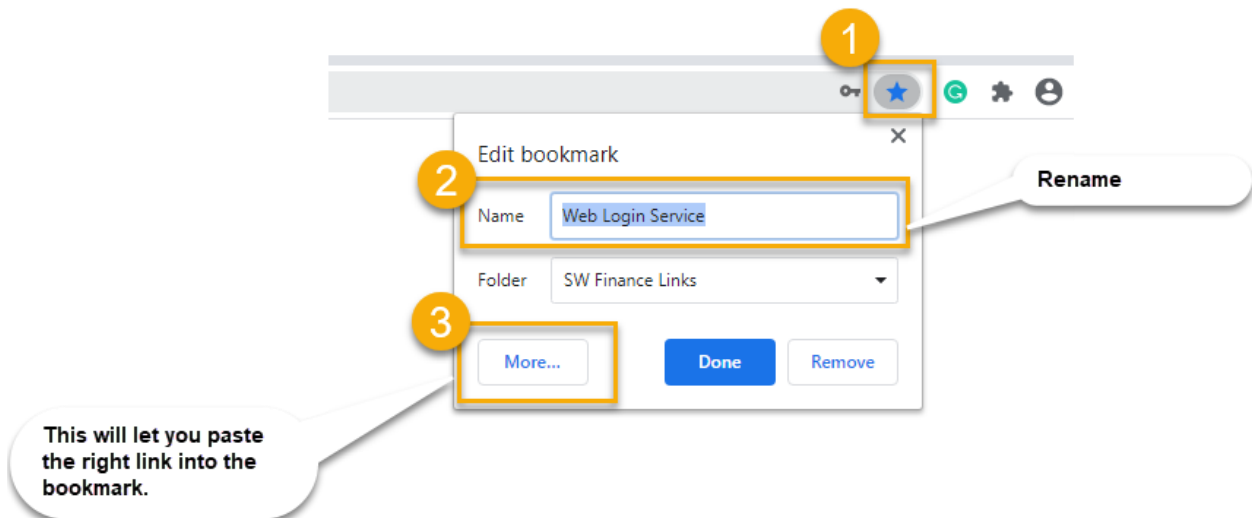
The link is:

<https://nextgensso.com/sp/startSSO.ping?PartnerIdpld=urn:mace:incommon:alaska.edu&TargetResource=https://dynamicforms.ngwebsolutions.com>

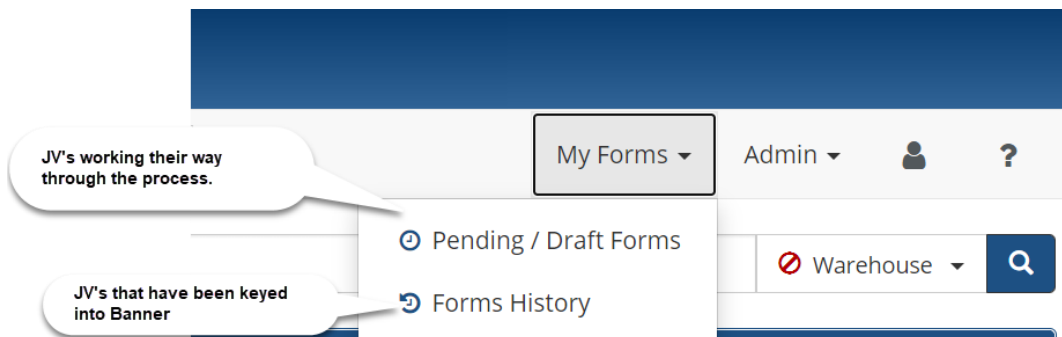
If you would like to put a link in your bookmarks,

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.



NextGen keeps track of your forms.




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



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:

2
Choose Approver: * -- Choose --

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

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.

3

JV Upload	* <input type="button" value="Choose File"/> No file chosen <i>Files over 25 MB will not be accepted</i>	Back Up Upload 1	<input type="button" value="Choose File"/> No file chosen <i>Files over 25 MB will not be accepted</i>
		Back Up Upload 2	<input type="button" value="Choose File"/> No file chosen <i>Files over 25 MB will not be accepted</i>

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

Comments are optional.

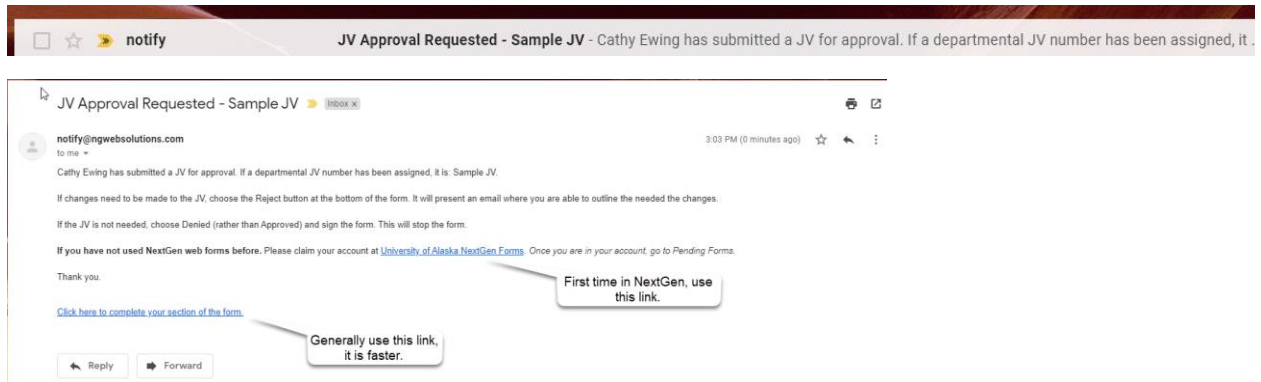
4. Click to Sign pops up an electronic signature statement. Type your name exactly as listed and click Sign Electronically

The screenshot shows a web form with a 'Sign electronically' pop-up window. The main form includes fields for 'Departmental JV Number or Description', 'Choose Approver', 'Are you uploading an EXCEL file?', 'JV Upload', 'Back Up Upload 2', and 'Comments'. A yellow circle with the number '4' is positioned near the bottom of the main form. A yellow arrow points from this circle to the name field in the 'Sign electronically' pop-up, which contains the text 'Type your name exactly as it is listed.' and the name 'Cathy' entered in the input field. The pop-up also contains a 'Sign Electronically' button and an 'Opt out and print' link.

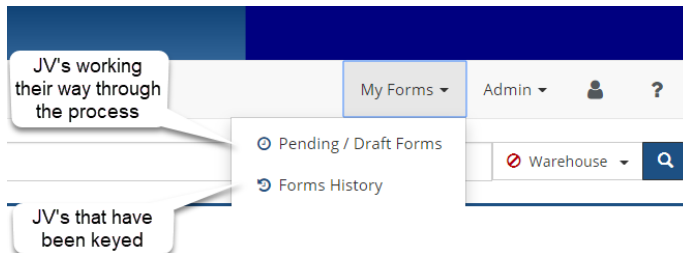
Submit is at the bottom of the form.

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

The screenshot shows the "Approval Decision" section of the form. It includes a dropdown menu with options: "-- Please Select --", "Approved", and "Denied". Callout boxes provide instructions: "If the form needs to go back to the initiator, do not select an answer." points to the dropdown, "This is stop the form. Click here, sign, submit and the form will not go further." points to the "Denied" option, and "Comments will disappear if the form is returned to the initiator." points to the "Comments" field. Below the decision section is a "Secondary approval required" checkbox and a "Signature" line with a "Date" field. A callout box says "Click here to sign" pointing to the signature line. At the bottom, it says "Hit **Submit** at the bottom of the form."

Secondary Approval Required

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

Secondary approval required

This section will open

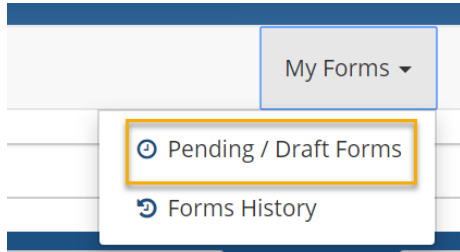
Secondary Approver: First Name Last Name:

Secondary Approver UA Email (*uusername@alaska.edu*)
example: clewing@alaska.edu - no vanity email addresses

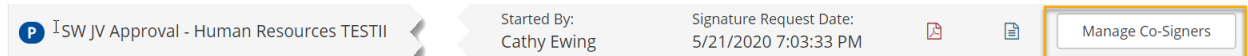
Changing or Reminding Approvers

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

- Log into NextGen
- Select Pending/Draft Forms



If the form says Manage Co-Signers, you can change the co-signer.



Co-Signer Information

* Click the pencil icon on the left to edit/change your co-signer(s) information

* Click the Re-send E-mail link to re-send an e-mail to your designated co-signer(s)

Edit	First Name	Last Name	Relationship	Email	Last Email Sent	
	Cathy	Ewing	Approver	clewing@alaska.edu	5/21/2020 7:03:33 PM	Re-send Email

Click the pencil to change the co-signer

Resends email

1 First Name

2 Last Name

3 Email:

4 Re-enter email:

5

Data Entry

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