



Update and Approve Internal Transactions LSUNO

Version Date: November 7, 2025

Training Guide
LSUNO

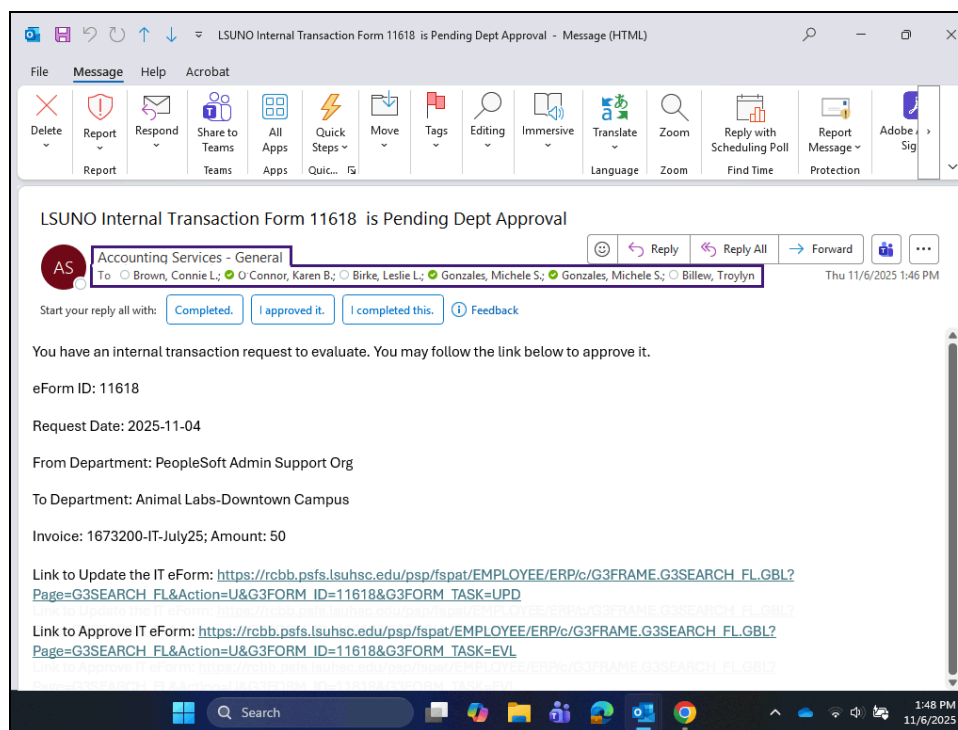
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Update and Approve Internal Transactions - LSUNO

Update and Approve InternalTr eForms Procedure

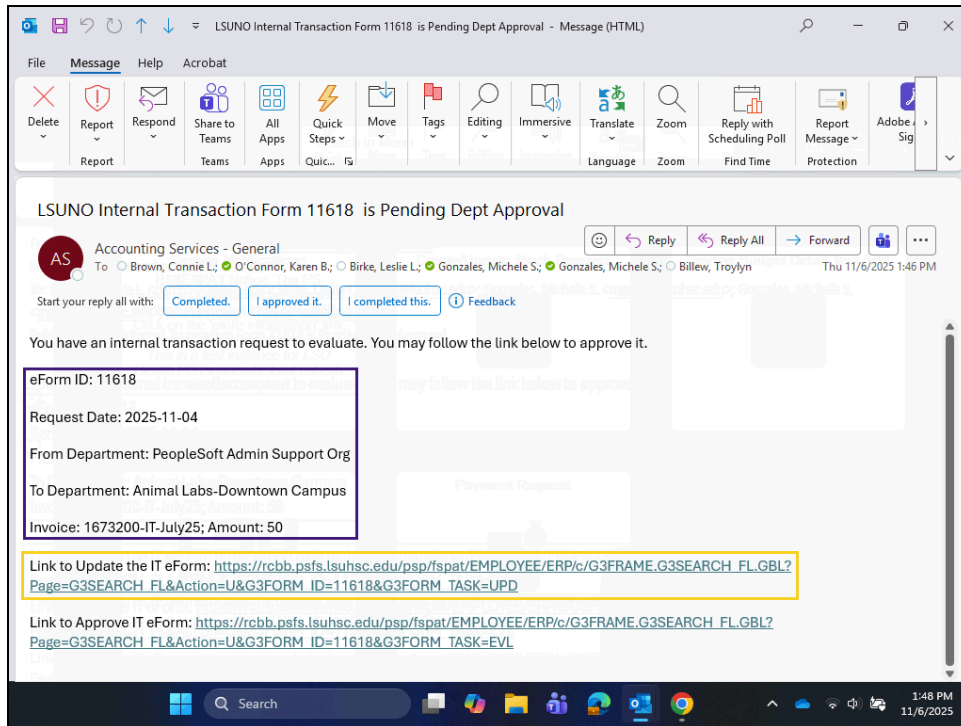
In this topic you will learn how to **Update and Approve InternalTr eForms**.



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

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Step	Action
2.	The form notes the <i>eForm ID</i>, date, "<i>From</i>" Department, "<i>To</i>" Department, and the <i>invoice</i> provided by the From Department. There are 2 links at the bottom of the email, the "Link to Update the IT eForm" link and the "Link to Approve IT eForm". To review the form and <i>complete</i> data entry for the chartstring information as well as <i>add</i> any <i>comments</i> and <i>attachments</i>, select the Link to Update the IT eForm. Click the Link to Update the IT eForm link.

Form Page **Financials PAT**     

INTERNAL TRANSACTION - SERVICE OR PRODUCT REQUESTED

*Quantity	Description	*Unit Cost	Amount	Insert A Row	Delete A Row
1	copy paper	50.00	50.00	+	-

1 row

Total Amount

Total Amount 50.00

DEPARTMENT PROVIDING SERVICE OR MATERIAL (RECEIVES CREDIT)

*Business Unit 

*Date 

*From DEPTID 
PeopleSoft Admin Support Org

From Department PeopleSoft Admin Support Org

*Requested by  O'Connor, Karen

*Invoice

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

Step	Action
3.	Review Data The form displays. Review the data entered by the "From" department

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Form Page **Financials PAT**     

Credit

	*SpeedType/Acctg Tag	*Account	Fund Code	Department	Program Code	Class Field	Project	*Amount	Comments
1	5673200001	530600	113	1673200	54000	90110	5673200001	25.00	
2	198000007A	530600	113	1980003	00000	35100	198000007A	25.00	

DEPARTMENT NEEDING SERVICE OR PRODUCT (RECEIVES EXPENSE/ DEBIT)

*To DEPTID 1322200 To Department Animal Labs-Downtown Campus
Animal Labs-Downtown Campus

Debit

	SpeedType/Acctg Tag	Account	Fund Code	Department	Program Code	Class Field	Project	*Amount	Comments
1								50.00	

File Attachments

Step	Action
4.	Review Data (continued) Enter any information needed to complete the form. Typically, this will be the chartstring information and additional comments to document the "To" department portion of the transaction.

Form Page **Financials PAT**     

SpeedType/Acctg Tag  Account  Fund Code  Department  Program Code  Class Field  Project  *Amount  Comme 

1   50.00

File Attachments

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

1 row

Status	Action	Description 	File Name 	Delete
1	Upload			Delete

Comments

**  M
** Thu, Nov 6 25, 01:45:37 PM

Step	Action
5.	After entering comments and adding any desired attachments, select the Resubmit button at the bottom of the eForm.
6.	Click the Resubmit button. NOTE: If you Resubmit the form more than once, you will receive a updated email from Accounting Services for each resubmit. Please make sure you are using the most recent email when selecting the Update or Approve link. Resubmit

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Form Result

Financials PAT

Update Internal Transaction : Result

Form ID 11618

Transaction / Signature Log

2 rows

	Current Date Time	Step Title	User ID	Description	Form Action	Time Elapsed
1	11/04/2025 4:19:05PM	Initiated	K [redacted]	[redacted] K [redacted]	Submit	
2	11/05/2025 5:47:31PM	Resubmitted	K [redacted]	[redacted] K [redacted]	Resubmit	1 day 1 hour 28 minutes

Refresh Log

Print

Step	Action
7.	The user then sees the results page. To <i>approve</i> the eForm, the user has <i>2 navigation options</i>. The user can select the GT eForms Home and then select: - The Internal Transaction Tile. - The Evaluate a GL Form eForm menu option that appears on the left side of the page. Or the user can go to the <i>email</i> s/he received and select the <i>link</i> to "Approve" the eForm.
8.	Option using Menu Navigation Click the Close eForm (Fluid) tab. 

GT eForms™ Homepage

GL Internal Transactions Financials PAT

Search by:

Business Unit Begins With

Date is Equal To

Form ID Begins With

Form Status is Equal To

Requested by Begins With

Invoice Begins With

From DEPTID Begins With

To DEPTID Begins With

Step	Action
9.	Make sure to enter your Business Unit and the Form ID to search. Click the Search button. Search

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GL Internal Transactions Form
Form Page
Financials PAT

SpeedType/Acctg Tag	Account	Fund Code	Department	Program Code	Class Field	Project	Amount	Comment	Insert A Row	Delete A Row
1							50.00	Testing in PAT	+	-

File Attachments

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

Attachment Uploaded	Action	Description	Description	File Name	Delete
1	View	Other	File for IT sample	Sample_File_IT.docx	Delete

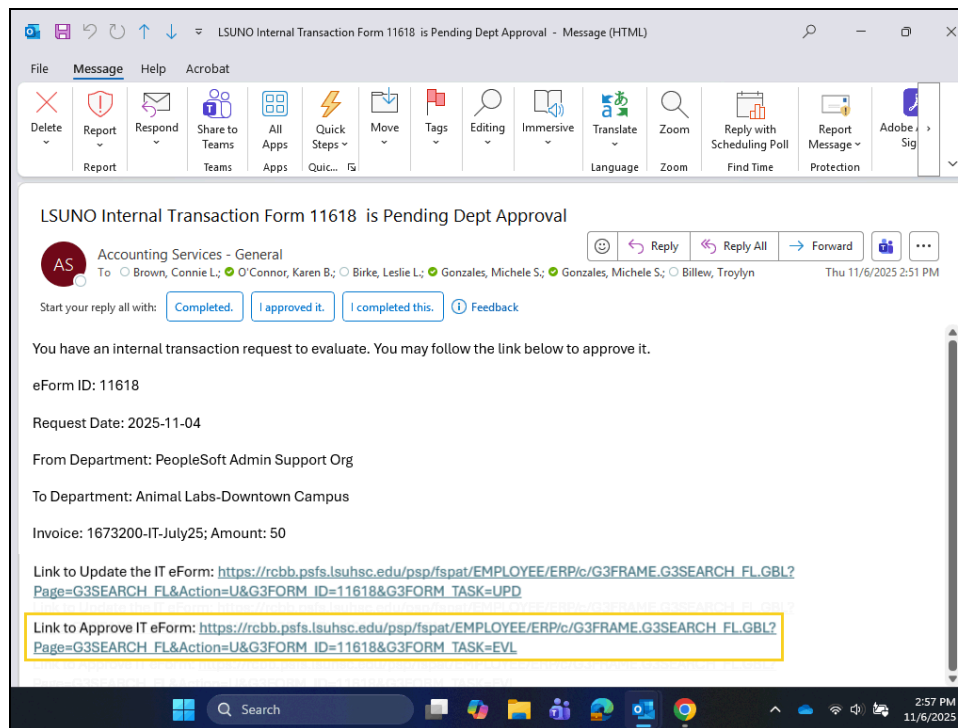
[Add](#)

Comments

** M
** Thu, Nov 6 25, 01:45:37 PM

[Search](#)
[Deny](#)
[Recycle](#)
[Hold](#)
[Print](#)
[Approve](#)

Step	Action
10.	Review <u>all</u> the information then select Approve.



Step	Action
11.	Option from Evaluate an eForm link in the email. Click the Link to Approve IT eForm: link.

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Form Page

Financials PAT

SpeedType/Acctg Tag	Account	Fund Code	Department	Program Code	Class Field	Project	Amount	Comment	Insert A Row	Delete A Row
1							50.00	Testing in PAT	+	-

File Attachments

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

Attachment Uploaded	Action	Description	Description	File Name	Delete
1	View	Other	File for IT sample	Sample_File_IT.docx	Delete

[Add](#)

Comments

** M

** Thu, Nov 6 25, 01:45:37 PM

[Search](#)

[Deny](#)

[Recycle](#)

[Hold](#)

[Print](#)

[Approve](#)

Step	Action
12.	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 any appropriate comments. Comments are not required but are helpful. Enter the desired information into the Comments field. Enter "Approving in PAT document demonstration".

Form Page Financials PAT

Speed Type/Acctg Tag	Account	Fund Code	Department	Program Code	Class Field	Project	Amount	Comment	Insert A Row	Delete A Row
1							50.00	Testing in PAT	+	-

File Attachments

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

Attachment Uploaded	Action	Description	Description	File Name	Delete
1	View	Other	File for IT sample	Sample_File_IT.docx	Delete

[Add](#)

Comments

Approving in PAT document demonstration

xx M
** Thu, Nov 6 25, 01:45:37 PM
Resubmitting for review not able to see.

[Search](#) [Deny](#) [Recycle](#) [Hold](#) [Print](#) [Approve](#)

Step	Action
13.	Definitions for each of the buttons shown at the bottom of the page follows. • <u>Approving</u> – Approve the Internal Transaction to move the form to the General Accounting team. • <u>Deny</u> – <i>This is a hard NO.</i> 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. • <u>Recycle</u> – 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. • <u>Hold</u> – Hold may be used by an approver if the user wants to discuss with others and prevent the internal transaction from being processed until s/he is ready. The primary reason for the Hold option is that the General Accounting (GA) team uses the feature in a later stage to prepare the data for journal entry. • <u>Search</u> – Search allows the user to search through the Internal Transaction forms on the system. • <u>Print</u> – This button allows the user to print the form data.

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Form Page **Financials PAT**     

Speed Type/Acctg Tag	Account	Fund Code	Department	Program Code	Class Field	Project	Amount	Comment	Insert A Row	Delete A Row
1							50.00	Testing in PAT		

File Attachments

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

Attachment Uploaded	Action	Description	Description	File Name	Delete
1 	View	Other	File for IT sample	Sample_File_IT.docx	Delete

[Add](#)

Comments

Approving in PAT document demonstration

*** M
** Thu, Nov 6 25, 01:45:37 PM
Please do not use the 'Print' button for printing the form.

[Search](#) [Deny](#) [Recycle](#) [Hold](#) [Print](#) [Approve](#)

Step	Action
14.	Click the Approve button. 
15.	After selecting the Approve button, the user sees a message like the one shown here.
16.	The form is routed to the General Accounting team for review. Once authorized by Accounting, a journal generator process runs, and the form is marked as Executed. Accounting reviews and processes the journal.
17.	This completes <i>Update and Approve InternalTr eForms</i> . End of Procedure.