



# STARS – Speedtype Tracking Approval Reconciliation System



**BUSINESS  
OPERATIONS**



# STARS Process

## Agenda

- Process Overview
- General Orientation
- Speedtype Reconciliation Form
- Roles
- Communications



# STARS Process

## Process Overview

- Allow multiple approvers – up to three
- Transparency to the department, Controller's Office, Audit Services and Sponsored Programs
- PI approval required on all Sponsored Programs
- Ability to not approve and approve with changes requested
- Easy to use
- Queue based design providing the ability to see reconciliations needing approval



# STARS Process

## Process Overview

Monthly financial close in PeopleSoft timeline is around the 8<sup>th</sup> of following month



Reconciler reconciles all speedtypes prior to next month's close



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Reconciliation is ready for review and/or approval within 30 days of receipt



Approvals in system and available for review and reporting by Central Offices



## STARS Process

### General Orientation

- OnBase
  - Document imaging system with workflow
- Web version
  - Access by email web links
- Unity desktop client
  - Open from desktop and have access to filter and sort work queues
  - Recommended for “power users”



## STARS Process General Orientation

- Login to OnBase using the link provided in the email or by going to: [onbase.louisville.edu/onbase](https://onbase.louisville.edu/onbase)
- Use university user ID and password



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Login



# STARS Process

## General Orientation

- Roles will be assigned based on securities setup by the department
- Security roles will determine the queues that are visible to individuals

The screenshot displays a software interface with two main sections. On the left, a 'Life Cycles' sidebar contains a search bar and a tree view of folders. The 'FI - SPDRECON - Speedtype Reconciliation' folder is expanded, showing sub-folders: 'Reconciliation (3)', 'Review (0)', 'PI Approval (0)', 'Manager (0)', 'Departmental Approval (0)', 'Hold Revisions Needed (0)', and 'Approved Changes Requested (0)'. A red arrow points from the 'Reconciliation (3)' folder to the first row of a table in the 'Inbox' section on the right. The table has four columns: 'Ic', 'SPDRECON - Request Numbr', 'SPDRECON - SpeedType', and 'SPDRECON - Fiscal Year'. The first row is highlighted in blue and contains the values: a calendar icon, 14164, 01603, and 2020. The second row contains: a calendar icon, 14174, CN180823, and 2020. The third row contains: a calendar icon, 14166, Z1315, and 2020. Below the table, there is a 'Reconciliation' button and a navigation bar with 'Inbox', 'Related Items', and 'User Interaction' options.

Ic	SPDRECON - Request Numbr	SPDRECON - SpeedType	SPDRECON - Fiscal Year
	14164	01603	2020
	14174	CN180823	2020
	14166	Z1315	2020



# STARS Process

## Speedtype Reconciliation Form

- JULY FY2020 - VP Dean Code

### Monthly Speedtype Reconciliation Form

<b>Form Number</b> 14164	<b>Fiscal Year</b> 2020	<b>Month</b> JULY
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#### Speedtype Department Information

<b>Speedtype</b> [REDACTED]	<b>Speedtype Name</b> [REDACTED]	<b>VP/Dean Code</b> [REDACTED]
<b>Department Number</b> [REDACTED]	<b>Department Name</b> [REDACTED]	

#### Comments

<b>Reconciler Comments (250 Character Limit)</b> [REDACTED]	<b>Reviewer Comments (250 Character Limit)</b> [REDACTED]	<b>PI Comments (250 Character Limit)</b> [REDACTED]
<b>Manager Comments (250 Character Limit)</b> [REDACTED]	<b>Departmental Approver Comments (250 Character Limit)</b> [REDACTED]	

**Save Changes**





# STARS Process

## Speedtype Reconciliation Form

### Uploads

#### Department Speedtype Reconciliation (0)

Department Speedtype Reconciliation

[Attach Department Speedtype Reconciliation](#)

#### University Report (0)

University Report Upload

[Attach University Report](#)

#### Other Attachments (0)

Upload Other Attachments

[Attach Other Attachments](#)

### SPDRECON - Actions

SPDRECON - Action By

SPDRECON - Action By Name

SPDRECON - Action Date Time

SPDRECON - Action Taken

[Save Changes](#)



# STARS Process

## Speedtype Reconciliation Form

- User section is extremely helpful to determine how many Departmental Approvers there are for a speedtype

Users		
<b>SPDRECON - Reconcilers</b>		
Reconciler UserID	Reconciler email	Reconciler name
<b>SPDRECON - Reviewers</b>		
<b>SPDRECON - Primary Investigators</b>		
<b>SPDRECON - Approvers</b>		
<b>SPDRECON - Managers</b>		



# STARS Process

## Roles - Reconciler

- Reconciler role is mandatory and cannot be anyone in an approval security role
- Reconciles speedtypes monthly and attaches all necessary documentation
- Works the Hold Revisions Needed and the Approved Changes Requested queue as needed



Reconciled send to  
next queue

Tasks





# STARS Process

## Roles - Reviewer

- Reviewer role is not mandatory
- Reviewer will review the reconciliation completed by the reconciler
- This role will catch any issues with the reconciliation prior to it going to the approver(s)



  
Pass Review Send  
to Next Queue

  
Does Not Pass Review  
Send Back to Reconciler  
Tasks



# STARS Process

## Roles - PI

- PI role is mandatory on all Sponsored Programs
- Security role is not needed because the main PI on each Sponsored Program will be pulled from PeopleSoft
- PI must approve before the reconciliation can be reviewed by the Department Approver
- PI can be the only approver in the department

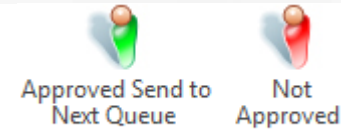




# STARS Process

## Roles - Manager

- Manager role is not mandatory
- First line approver
- Approves reconciliation prior to the Departmental Approvers
- Manager has more first-hand knowledge about what should and should not be on the reconciliation

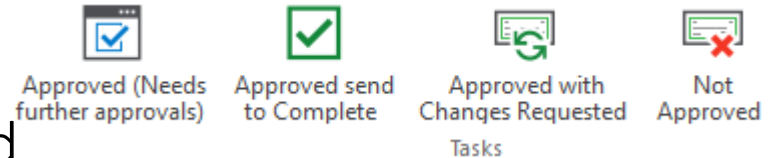




# STARS Process

## Roles - Departmental Approver

- Departmental Approver is mandatory
  - Only exception is a Sponsored Program and the PI can be the only approver
- There can be up to three Departmental Approvers
  - Order cannot be determined in OnBase
- “Approved with Changes Requested” should only be selected by the last approver





## STARS Process Communication

- Reconciler – Alerted to go to the Reconciliation queue by the month end close email
  - Reconcilers will receive an email if something is “Not Approved” or “Approved with Changes Requested”
- Reviewer, PI, Manager and Departmental Approvers – Receive a communication with an OnBase link when a reconciliation is ready for review or approval





## STARS Process Communication

- Anyone who has taken an action on a monthly reconciliation form receives an email if anyone clicks “Not Approved” or “Approved with Changes Requested”
- A weekly reminder email is sent out for anything that has been in any of the approval queues for a week or more



# STARS Process

## Quick Start Guides and Videos

- Visit the Business Operations website:

[businessoperations.louisville.edu](https://businessoperations.louisville.edu)

<https://businessoperations.louisville.edu/hc/en-us/articles/360052710333-STARS-Speedtype-Tracking-Approval-Reconciliation-System-Pilot-Program-Process-Overview>

- Information available on the website:
  - Videos and Quick Start Guides on each role
  - Frequently Asked Questions (FAQ's)
  - Document Retrieval Instructions
  - Video of the entire process
  - A PDF of this slide deck



# STARS Process Questions

- Contact Business Operations at 502-852-7549
- By email at [businessops@louisville.edu](mailto:businessops@louisville.edu)

