My Journals
Quick Reference Guide

Controller's Office Version 1.0. Effective July 20, 2026

Best Practices

✓ Keep the posting date as today's date.
✓ Use meaningful business descriptions.
✓ Attach supporting documentation before submitting.
✓ Verify debits and credits balance exactly.
✓ Save drafts while waiting for additional information.
✓ Use Recall rather than Reverse whenever possible.
✓ Review approval comments carefully before resubmitting.
✓ Use the provided Scribe documentation for step-by-step assistance.

Quick Reference

Task	Action
Create Journal	Create Journal
Save Work	Save
Add Line	Add Accounting
Attach Documentation	Paperclip
Submit	Submit Journal
Fix Pending Journal	Recall
Copy Previous Journal	Copy
Reverse Posted Journal	Reverse
View Status	Pending Journals
Approve Journal	Approved Documents

Before You Begin

✓ Verify this is a **non-payroll** journal entry.

✓ Gather:

- Index(es)
- Account code(s)
- Dollar amount(s)
- Business purpose
- Supporting documentation

Create a Journal

1. Open **Connect Lehigh**
2. Select **Banner Links**
3. Open **Banner 9 Self-Service Finance**
4. Select ***My Journals***
5. Click **Create Journal**

Important Rules

✓ **Leave the Posting Date Alone; Do NOT change the posting date.**

Use today's date unless reopening a saved draft for submission.

✓ **Select the Correct Journal Type**

Standard Reallocation	***JVE**
Research Reallocation	**JRA**

Complete Each Accounting Line

Enter:

✓ Index
✓ Account Code
✓ Amount
✓ Debit or Credit
✓ Business Description

Do NOT change: (These populate automatically).

- Fund
- Organization
- Program

Write a Good Business Description

Your description should explain **WHY** the entry is being made—not simply what you're doing.

Good Examples

✓ Correct copier expense

✓ Reallocate office supplies

✓ Move travel expense to grant

Avoid

✗ Move funds

✗ Transfer expense

Verify Before Submitting

✓ Debits equal Credits

✓ Amounts balance exactly

✓ Description completed

✓ Supporting documentation attached

Attach Documentation

Click the 📎 **Paperclip**

Attach only what is necessary for audit purposes.

- PDF
- Word
- Excel
- Supporting documentation

Submit:

Click: **Submit Journal**

The journal receives a **JDOC Number** and moves to **Pending**.

If You Need to Make Changes

Before Posting - Use **Recall**

- Returns journal to Draft
- Make corrections
- Resubmit

After Posting - Use **Reverse**

Creates an offsetting journal entry.

Track Status

From the Dashboard you can view:

- Draft Journals
- Pending Journals
- Completed Journals

Use the **Information (ⓘ)** icon to see:

- Current approver
- Remaining approval routing

Approvers

Approvers receive email notifications.

Before approving:

✓ Review accounting
✓ Review business purpose
✓ Review attachments

If corrections are needed:

Disapprove and leave comments explaining what must be fixed.

Research Journals

Use **JRA**

Less than 90 Days

✓ Attach Research Justification Form

Greater than 90 Days

✓ Complete DocuSign approval first
✓ Upload signed packet
✓ Then submit MyJournal

Remember the "Five Checks" Before You Submit

✅ Correct Journal Type (*JVE or JRA)

✅ Debits = Credits

✅ Proper Business Description

✅ Attach Supporting Documentation

✅ Posting Date = Today

Common Mistakes to Avoid

❌ Changing the posting date

❌ Forgetting attachments

❌ Using the wrong journal type

❌ Poor business descriptions

❌ Debits and credits not balancing

❌ Using *My Journals* for payroll entries

Need Help?

Tool Questions

- Contact Nolan Graber nrg325@lehigh.edu in the Controller's Office

Accounting Questions

- Contact Controller's Office inctr@lehigh.edu shared services

Research Questions

- ORSP / Contract & Grant Specialists