



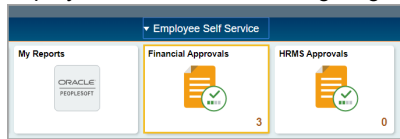
Approving Budget Transfer Journal Requests

View Budget Transfer Journal Approval Page

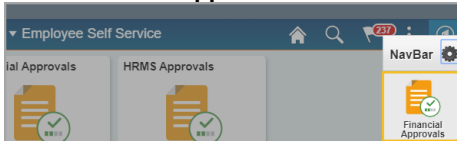
To view/take action on Budget Transfer Approval requests, the Commitment Control Budget Transfer Journal Approval page can be accessed through different navigation options.

1. Employee Self Service Landing Page Tile

- * Employee Self Service Landing Page > Financial Approvals



2. Nav Bar Financial Approvals Tile—NaviBar> Financial Approvals



3. Classic Navigation/Manage Control Budget Journals

- * Main Menu > Commitment Control > Budget Journals > Manage Control Budget Journals
- * Enter fields then click **Search** button to find Budget Transfer Journals.

Manage Control Budget Journal Approval

Manage Control Budget Journal Approval

Search Budget Control Journals

To locate journals that require your approval (or journals that previously required your approval), edit the criteria and select the Search button.

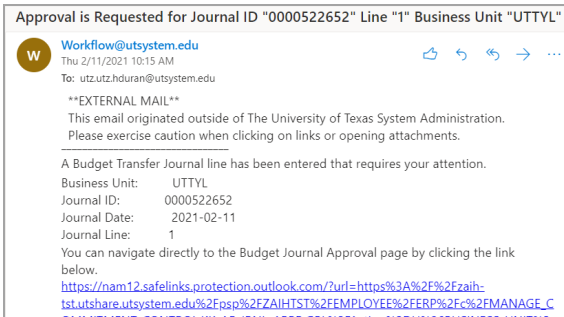
Business Unit Requester

Journal ID Budget Entry Type

Journal Date From To Journal Date

*Approval Status *Approval Level

4. Email Notification—Click link on Approval Request email notification received.



Fluid Budget Transfer Journal Approval Page

The **Budget Transfer Journal Approval Page** is used to view and take action on pending approvals. This page allows approvers to review current Budget Transfer Approval requests, associated attachments, descriptions, and details. In addition, actions of **Approve**, **Deny**, or **Hold** may be taken from this page.

1. The **Header** section displays the Description entered on **Budget Transfer** request. It also includes the amount which is being reduced and any systemic actions taken.
2. The **Summary** section displays the Business Unit, Journal Date, name of user who entered the Journal, the type, Journal ID, Ledger Group, date The Journal was entered, and Fiscal Year/Accounting Period.
3. The **Attachments** section displays the number of attachments added to the **Budget Transfer Journal**, these can also be accessed by clicking on the arrow for **View Attachments**.
4. The **Lines** section displays Lines requiring action/approval (**Pending** Button) as well as the ability to view all the lines in the **Budget Transfer Journal** (**All** button).
5. Clicking the **Check-box** above the lines allows Approver to select all lines pending action without having to manually select specific lines pending approval.
6. Journal line information displays the **ChartField** values, amounts, as well as descriptions for **Department ID**, **Cost Center**, and **Project**.
7. The **Approver Comments** section may be used by Approver to enter comments before taking action on Budget Transfer Request.
8. The **Approval Chain** section displays Approvers for the **Budget Transfer Request** as well as any actions and comments by other Approvers within the Approval Chain.
9. **Approve**, **Deny**, or **More** buttons may be used to take action on the Budget Transfer Request.

Education - To add attachment

1.00 USD

1 line(s) are pending your approval

Delegated by Sydni Blundell

Summary

Business Unit UTUTL Journal ID 0000502283

Journal Date 01/28/21 Ledger Group OPE

Entered by Herlinda Duran - UTShare Entered on 01/28/21

Entry Type Transfer Adjustment Year / Period 2021 / 5

Attachments

View Attachments (1)

Lines

Pending

Select	Line	Amount	Account / Project	Fund Code	Department	Cost Center	Function
<input type="checkbox"/>	1 Party Expenses	-1.00 USD	A4000	2100	103500 - Psychology & Counseling	21001019 - Psychology	100
<input type="checkbox"/>	2 woohoo Expenses	1.00 USD	A4000	2100	103500 - Psychology & Counseling	21001020 - Psychology PT FAC	100

Approver Comments

Approval Chain

Budget Transfer Workflow Approval Page

View Attachments

The attachments section of the **Budget Transfer Journal Approval** page allows the Approver to view attachments provided by requestor.

1. To view attachments on the **Budget Transfer Journal Approval** page, click **View Attachments** button available on the page.
2. Available attachments will be listed on the **View Attachments** window.
3. Click the link listed as **Attached File**, attachment will open in a new window or tab based on browser settings.

Sequence	Attached File	Description	Created By
1	AttachmentTestWordDoc.docx	Testing Attachment	Herlinda Duran - UTShare

View Approval Chain

The **Approval Chain** section of the **Budget Transfer Journal Approval** page allows the Approver to review actions taken, identify pending approvals, and view comments entered by other approvers.

1. Click the Approval Chain button on the Budget Transfer Journal Approval page.
2. The **Approval Chain** window will display levels of approval for this **Budget Transfer** request, **Pending Approvals**, and name of approver for approval steps. When multiple approvers exist, the **Multiple Approvers** link will display.
3. To view the list of approvers, click the **Multiple Approvers** link as needed.
4. **Approver Information** window will display approvers.

Approval Chain

Department Approver

Unit UTYYL, ID 0000502283, Date 2021-01-28, Line 1 **Pending**

Start New Path

Department Approver

Approved

Angela K Nunez for Amy Roberson-Hayes
KK-Department Approver
02/01/21 10:36 AM

Pending

Herlinda Duran - UTShare for Sydney Blundell Dean

Comments

Comment History

Budget Office Approver

Unit UTYYL, ID 0000502283, Date 2021-01-28 **Awaiting Further Approvals**

Start New Path

Budget Office Approver

Not Routed

Multiple Approvers
Budget Office Approval2

Not Routed

Approver Information

Ryan D Lilly
Not Routed

Angela K Nunez
Not Routed

Approve, Deny, or Hold Approval

The **Budget Transfer Journal Approval** page is used take action on Budget Transfer Journal requests once all information has been reviewed. Options available to take action are **Approve**, **Deny**, or **Hold** Approval.

1. To Approve, Deny, or Hold Approval on a Budget Transfer Journal request, begin by either clicking on each line pending approval or click the Check-box above the lines to select all pending lines.
2. Enter comments on reason for Approve, Deny, or any other comments needed in the Approver Comments section.
3. Click Approve, Deny, or More button
4. For Approve or Deny buttons, a window will display to enter Approver Comments or will display Comments already entered on the Budget Transfer Journal Approver Comments. For More button, the Hold button may display.
5. Click Submit button to complete action.

Journal ID 0000502283
Ledger Group OPE
Entered on 01/28/21
Year / Period 2021 / 5

Select	Line	Amount	Account / Project	Fund Code	Department	Cost Center	Function
<input type="checkbox"/>	1	Party Expenses	-1.00 USD	A4000	2100	103500 - Psychology & Counseling	21001019 - Psychology 100
<input type="checkbox"/>	2	woohoo Expenses	1.00 USD	A4000	2100	103500 - Psychology & Counseling	21001020 - Psychology PT FAC 100

Approver Comments

Approve Deny More

Cancel Approve Submit

You are about to approve this request.

Approver Comments

Cancel Deny Submit

You are about to deny this request.

Approver Comments

Budget Journal

Approve Deny More

Pushback

Hold

Approval Options

Approve—this option approves the current pending stage and **Budget Transfer Request** moves to next level of Approval. Budget Office will final Approve and Post the transfer request once all other approvals have been completed.

Deny—this option denies the current pending stage and terminates all other approval levels identified for Budget Transfer Request. Requestor may modify Journal based on comments provided and may resubmit the Budget Transfer Request. Resubmitting restarts the workflow and all levels will require approval.

Hold—This option is only available when multiple approvers exist in one stage. An approver may put the Budget Transfer Journal approval on Hold so that other approvers cannot take action. Ex. Approver needs additional details to be researched offline but does not want other approvers to take action. Hold removes this journal from approval queue for other approvers.