

## Modify Budget Transfer Job Aid

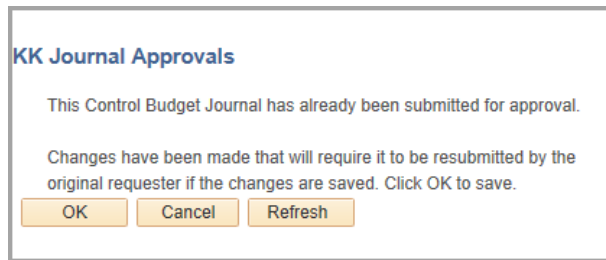
The purpose of this job aid is to explain how to modify a submitted budget transfer journal. Only the person who originally requested the budget transfer will be able to submit the modified journal.

1. Begin by navigating to **Nav Bar > Menu > Financials > Commitment Control > Budget Journals > Enter Budget Transfer**
2. The **Enter Budget Transfer** page is displayed. The **Find an Existing Value** tab is used to search for an existing budget transfer form by **ID, Data Status,** or the **Empl ID of the person** who entered the transfer.

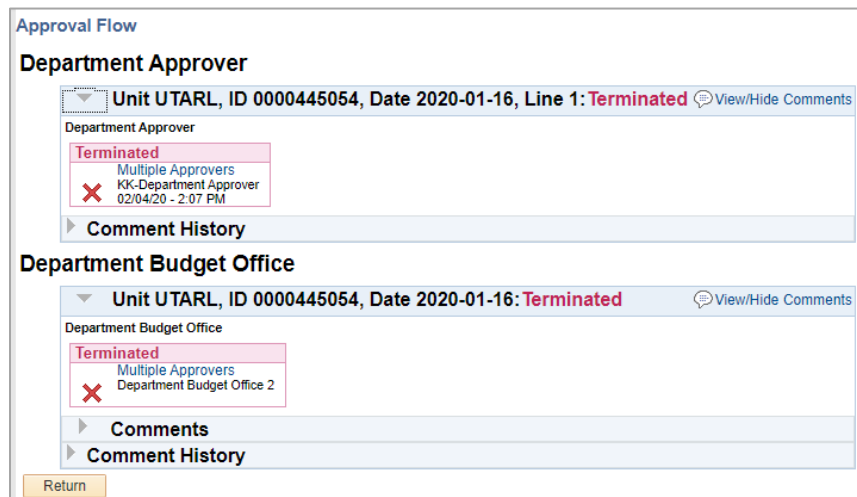
**NOTE:** By default, the **User ID** field defaults with your **Empl ID**. If you are not the creator of the transfer document, remove your **Empl ID** from the **User ID** field.

3. Make the appropriate modifications to the Journal.
4. To save modifications made to a submitted Budget Transfer Journal, click **Save** button.

The following message will display upon attempting to Save.



5. Click the **“OK”** button on the KK Journal Approvals message.
6. The Approval Header Status on the Budget Transfer Journal will now display a Canceled link. Each line in the Journal will also display as Canceled. To see the Approval Flow page, click the Canceled link. The status of Approval shows as Terminated. Click Return to return to the journal.



7. Select **“Budget Pre-Check”** from the drop-down menu on the Process field.

8. Click the **“Process”** Button

The screenshot shows the 'Budget Header' section of a software interface. At the top, there are tabs for 'Budget Header', 'Budget Lines', and 'Budget Errors'. Below these, the 'Unit' is 'UTARL', 'Journal ID' is '0000537188', and 'Date' is '09/01/2021'. There are checkboxes for 'Errors Only' and 'Submit For Approval'. The 'Budget Header Status' is 'None' and 'Approval Header Status' is 'Not Submitted'. A red box with the number '1' highlights the '\*Process' dropdown menu, which is currently set to 'Budget Pre-Check'. Another red box with the number '2' highlights the 'Process' button on the right side of the interface.

9. Click **Yes** to budget check without posting the journal. When complete, the Budget Header Status will update to Checked Only if valid, or Error if there is a problem.
10. Once a Check Only status is obtained, select **“Submit Journal”** from the drop-down menu on the Process field.
11. Click the **“Process”** button.

This screenshot shows the 'Budget Header' section after the first step. The 'Unit' is 'UTARL', 'Journal ID' is '0000537188', and 'Date' is '08/06/2021'. The 'Budget Header Status' is now 'Checked Only' and 'Approval Header Status' is 'Not Submitted'. A red box with the number '1' highlights the '\*Process' dropdown menu, which is now set to 'Submit Journal'. Another red box with the number '2' highlights the 'Process' button on the right side of the interface.

The Journal will be submitted, will display once again with a **“Pending”** Approval Header Status and the Approval Flow will restart. Each level will have to re-approve the Journal for it to be Approved. To see the Approval Flow, click on the word **“Pending”** in the Approval Header Status:

The screenshot shows the 'Approval Flow' window. It has a title bar 'Approval Flow' and a sub-header 'Department Approver'. Below this, there is a dropdown menu showing 'Unit UTARL, ID 0000445054, Date 2020-01-16, Line 1: Pending' with a 'View/Hide Comments' link. Underneath, the status is 'Pending' with 'Multiple Approvers' and 'KK-Department Approver'. There is a 'Comment History' section below. The next section is 'Department Budget Office', with a dropdown menu showing 'Unit UTARL, ID 0000445054, Date 2020-01-16: Awaiting Further Approvals' and a 'View/Hide Comments' link. Below this, the status is 'Not Routed' with 'Multiple Approvers' and 'Department Budget Office 2'. There are 'Comments' and 'Comment History' sections. At the bottom left, there is a 'Return' button.