

Modify Budget Transfer Job Aid

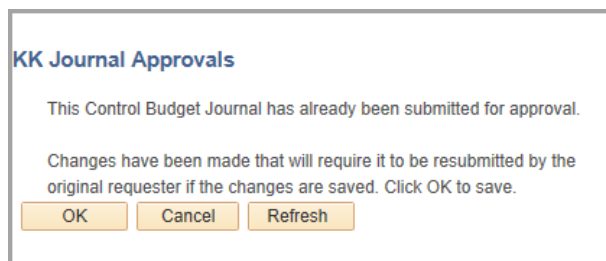
The purpose of this job aid is to explain how to modify a submitted budget transfer journal. Only the person who originally requested the budget transfer will be able to submit the modified journal.

1. Begin by navigating to **Nav Bar > Navigator > 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.

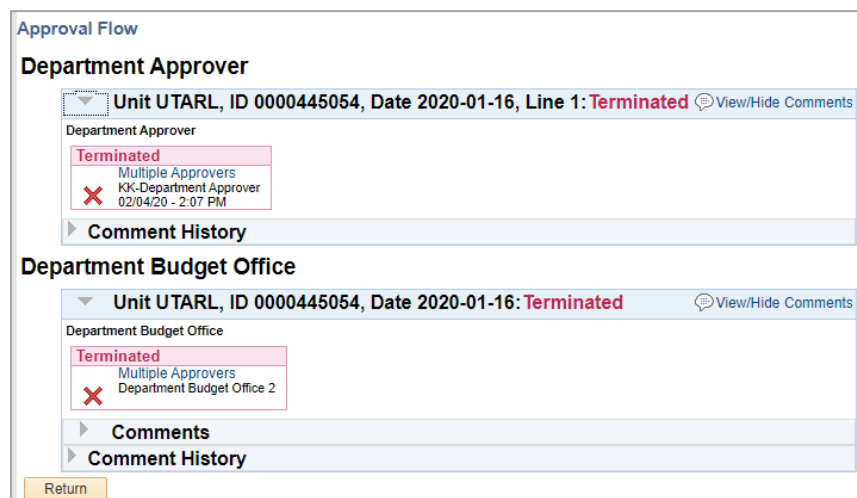
NOTE: *By default, the User ID field defaults with your Empl ID. If you are not the creator of the transfer document, remove your Empl ID from the User ID field.*

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

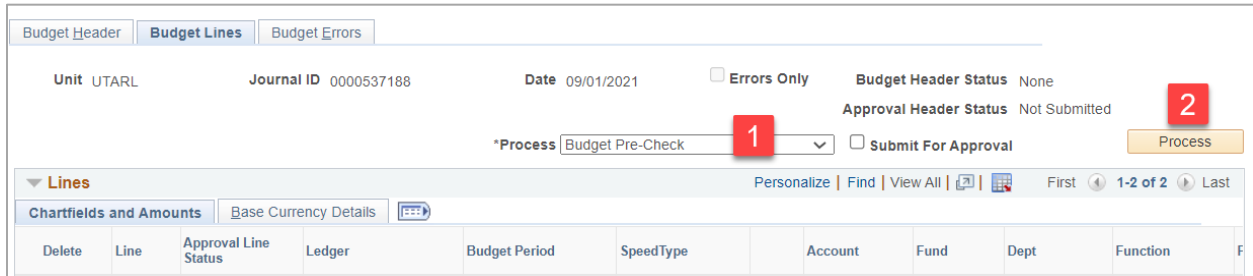
The following message will display upon attempting to Save.



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



Budget Header | Budget Lines | Budget Errors

Unit UTARL Journal ID 0000537188 Date 09/01/2021 Errors Only Budget Header Status None

Approval Header Status Not Submitted

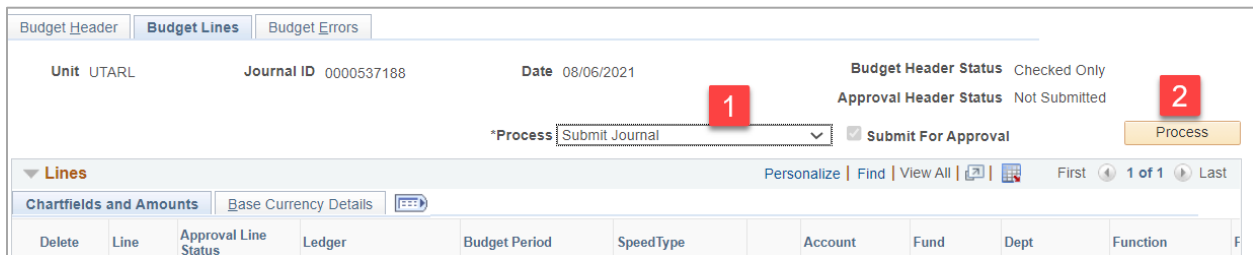
*Process Budget Pre-Check **1** Submit For Approval **2** Process

▼ Lines Personalize | Find | View All | [Print] [Refresh] First 1-2 of 2 Last

Chartfields and Amounts Base Currency Details [PDF]

Delete	Line	Approval Line Status	Ledger	Budget Period	SpeedType	Account	Fund	Dept	Function	F
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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.



Budget Header | Budget Lines | Budget Errors

Unit UTARL Journal ID 0000537188 Date 08/06/2021 Budget Header Status Checked Only

Approval Header Status Not Submitted

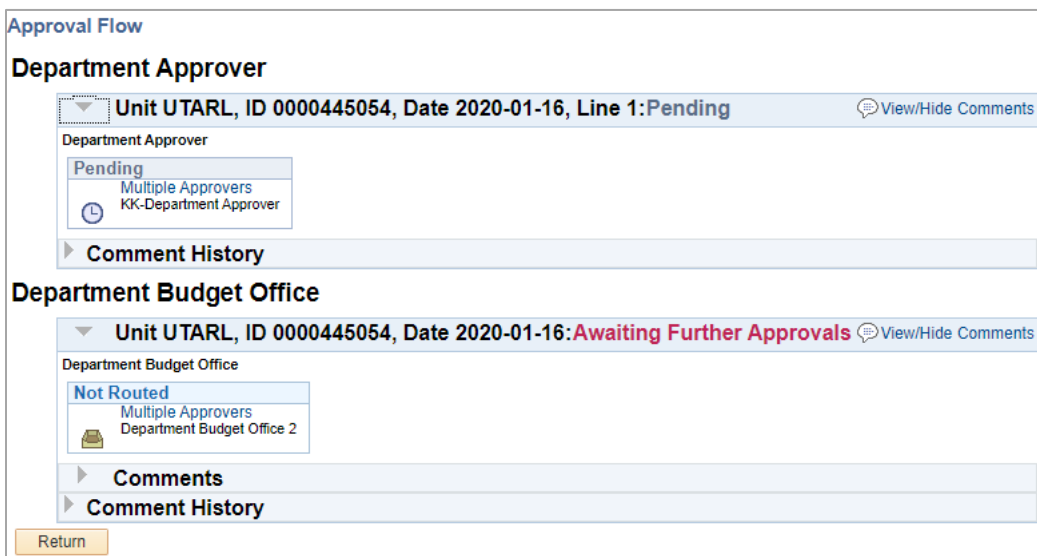
*Process Submit Journal **1** Submit For Approval **2** Process

▼ Lines Personalize | Find | View All | [Print] [Refresh] First 1 of 1 Last

Chartfields and Amounts Base Currency Details [PDF]

Delete	Line	Approval Line Status	Ledger	Budget Period	SpeedType	Account	Fund	Dept	Function	F
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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:



Approval Flow

Department Approver

Unit UTARL, ID 0000445054, Date 2020-01-16, Line 1: Pending [View/Hide Comments](#)

Department Approver

Pending

Multiple Approvers
KK-Department Approver

▶ Comment History

Department Budget Office

Unit UTARL, ID 0000445054, Date 2020-01-16: Awaiting Further Approvals [View/Hide Comments](#)

Department Budget Office

Not Routed

Multiple Approvers
Department Budget Office 2

▶ Comments

▶ Comment History

[Return](#)