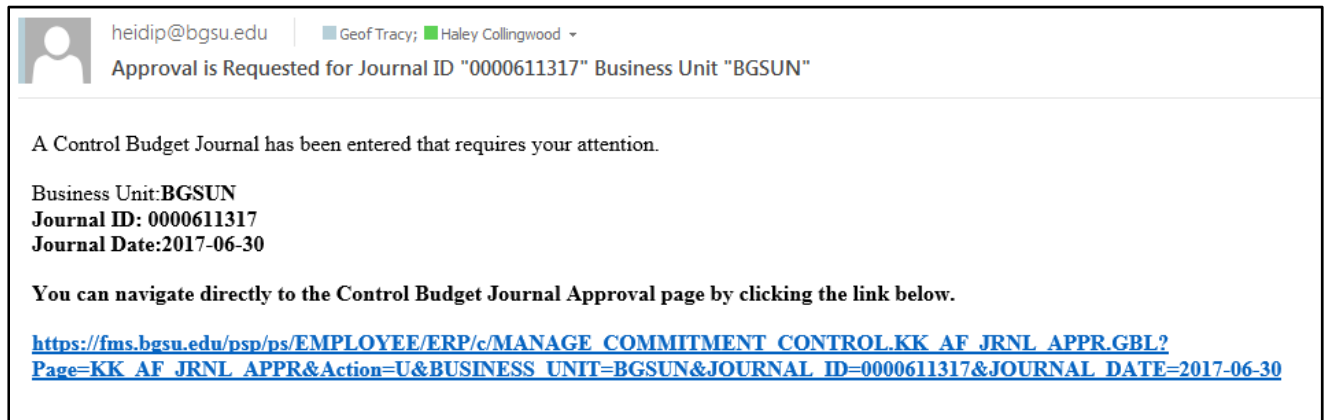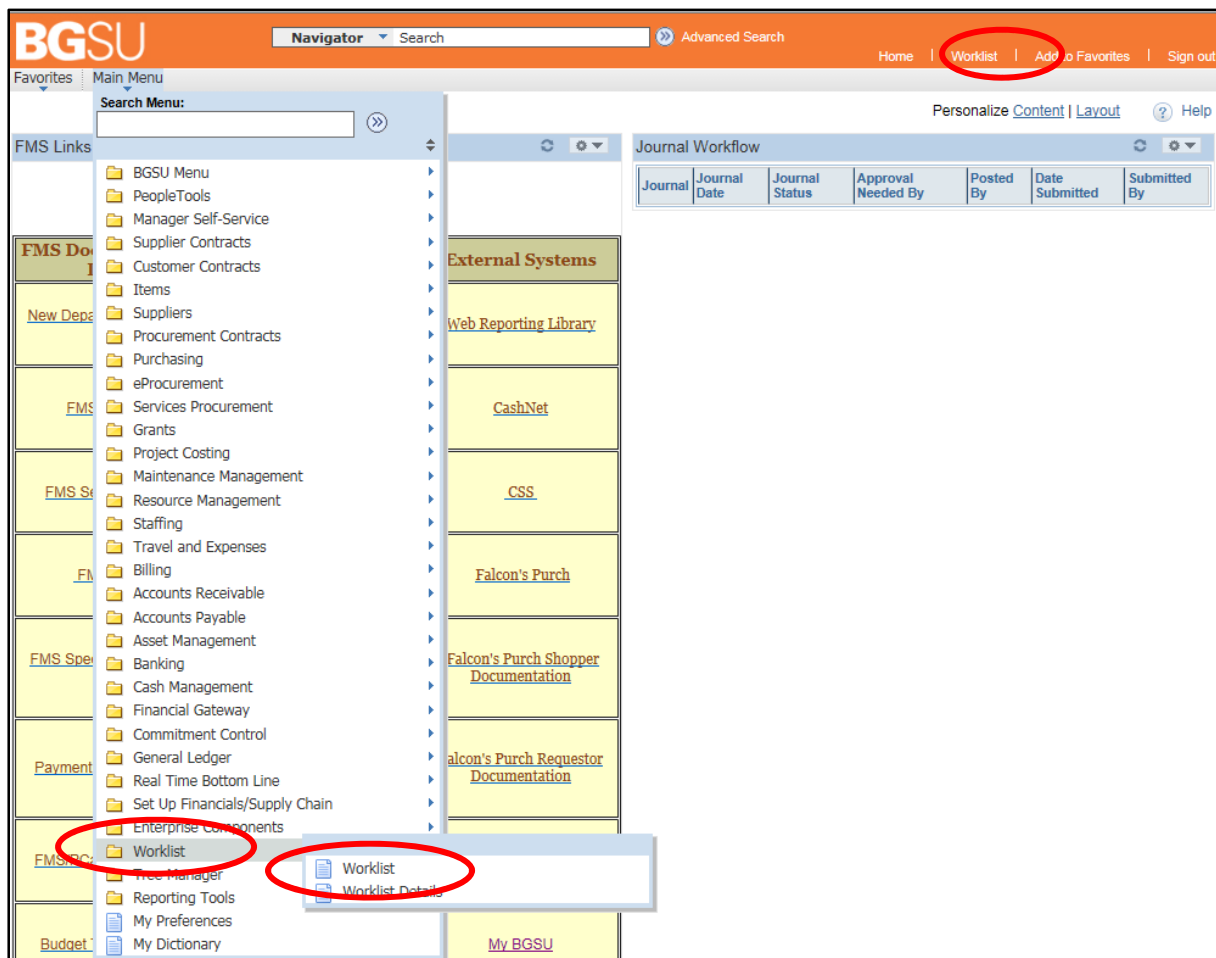# How to Review & Approve a Budget Transfer

- When a Budget Transfer has been submitted that requires your approval, you will receive an email notification as shown below.

- You can navigate to your Worklist in FMS by clicking the link in the email or by navigating to it within FMS.

Navigation in FMS:

Worklist:

- The *Worklist* In FMS will include both Budget Transfer and Journal Entry notification.
- You can sort your *Worklist* by clicking on the column heading that you wish to sort by.
- To access any item in your list simply click on the Link.

Worklist

Worklist for HALEYC: Haley D Collingwood

Detail View   Worklist Filters [▾]   🔊 Feed ▾

Worklist Items

From	Date From	Work Item	Worked By Activity	Priority	Link
Geofrey Tracy	07/06/2017	Transaction Approved	Approval Workflow	3-Low ▾	KKJournalApproval, 110, BG KK Adjustment Jrnl 92V2, 2010-07-01, N, 0, BUSINESS_UNIT:BGSUN JOURNAL_ID:0000611267 JOURNAL_DATE:2017-06-30 RDC:A,0,R
Geofrey Tracy	07/06/2017	Transaction Approved	Approval Workflow	3-Low ▾	KKJournalApproval, 100, BG KK Adjustment Jrnl 92V2, 2010-07-01, N, 0, BUSINESS_UNIT:BGSUN JOURNAL_ID:0000611190 JOURNAL_DATE:2017-06-30 RDC:A,0,R,

Reviewing the Transfer:

- Below is the screen you will see when you click on either the link in the email or your *Worklist*
- From this screen you can review the Transfer two ways:
  - ○ Click on the arrow next to *Control Budget Journal Lines* to see the detail below.
    - ▪ Click on the icon with the yellow box around it to see the transfer lines.

Control Budget Journal Approval

Business Unit BGSUN		Return to Worklist
Journal ID 0000611376		Attachments (0)
Journal Date 06/30/2017		Control Budget Transfer Page
Ledger Group CC_LINE_AP	Status Approved	
Fiscal Year 2017	Debits $25,000.00	
Period 12	Credits $25,000.00	
Budget Entry Type Transfer Adjustment	Description Year-end carryover trfs - move	
	Requester SSWINFO	

▶ Approval Flow

To add comments to the journal's approval process, enter and select any one of the four approval action buttons. Then the comments can be viewed from the Approval Flow Graphic Display.

254 characters remaining

[Approve]   [Deny]   [Hold]   [Pushback]   [Add Comments]

Control Budget Journal Lines   Personalize | Find | View All | 🔲 | 🔠   First ◀ 1-4 of 4 ▶ Last

Collapse section

Line	Approval Line Status	Un	Ledger	Budget Period	Entry Event	Fund	Dept	Account
1	Not Required	BGSUN	LINE_BUD	2017		18000	208000	58988
2	Not Required	BGSUN	LINE_BUD	2017		10000	208000	58988
3	Not Required	BGSUN	LINE_BUD	2017		18000	207500	58988
4	Not Required	BGSUN	LINE_BUD	2017		10000	207500	58988

▼ **Control Budget Journal Lines**   Personalize | Find | View All | 🔲

Line	Approval Line Status	Unit	Ledger	Budget Period	Entry Event	Fund	Dept	Account	Currency	Amount	Base Currency	Base Amount
1	Not Required	BGSUN	LINE_BUD	2017		10000	114910	58002	USD	942.00	USD	942.00
2	Not Required	BGSUN	LINE_BUD	2017		10000	119100	58002	USD	-942.00	USD	-942.00

Reviewing the Transfer (continued):

- o Click on the *Control Budget Transfer Page* link to review the actual transfer, then click search on the next box that opens.

Control Budget Journal Approval

Business Unit	BGSUN
Journal ID	0000611376
Journal Date	06/30/2017
Ledger Group	CC_LINE_AP
Fiscal Year	2017
Period	12
Budget Entry Type	Transfer Adjustment

Return to Worklist
Attachments (0)
Control Budget Transfer Page

Status Pending
Debits $25,000.00
Credits $25,000.00
Description Year-end carryover trfs - move

Requester SSWINFO

▶ Approval Flow

To add comments to the journal's approval process, enter and select any one of the four approval action buttons. Then the comments can be viewed from the Approval Flow Graphic Display.

254 characters remaining

Approve	Deny	Hold	Pushback	Add Comments

▶ Control Budget Journal Lines

Enter Budget Transfer

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

▼ Search Criteria

Business Unit	= ⌄	BGSUN ✕ 🔍
Journal ID	begins with ⌄	0000611376
Journal Date	= ⌄	06/30/2017 📅
UnPost Sequence	= ⌄	
Budget Header Status	= ⌄	⌄
Description	begins with ⌄	
User ID	begins with ⌄	SSWINFO 🔍

☐ Case Sensitive

Limit the number of results to (up to 300): 300

Search	Clear	Cancel	Basic Search	💾 Save Search Criteria

Reviewing the Transfer (continued):

- After you hit Search, a new tab will open to view the Budget Transfer. You can view both the detail lines and the Header tab.
- Do not make any changes when on this page. Please contact the creator/requestor of the transfer and have them make the necessary changes.
- Click on either *Ok* or *Cancel* to close the window and return to the Approval page.

Approve / Deny Budget Transfer:

- To approve the transfer simply click the *Approve* button.
- To deny a transfer, add a comment in the box explaining why you are denying the transfer and then click the *Deny* button.