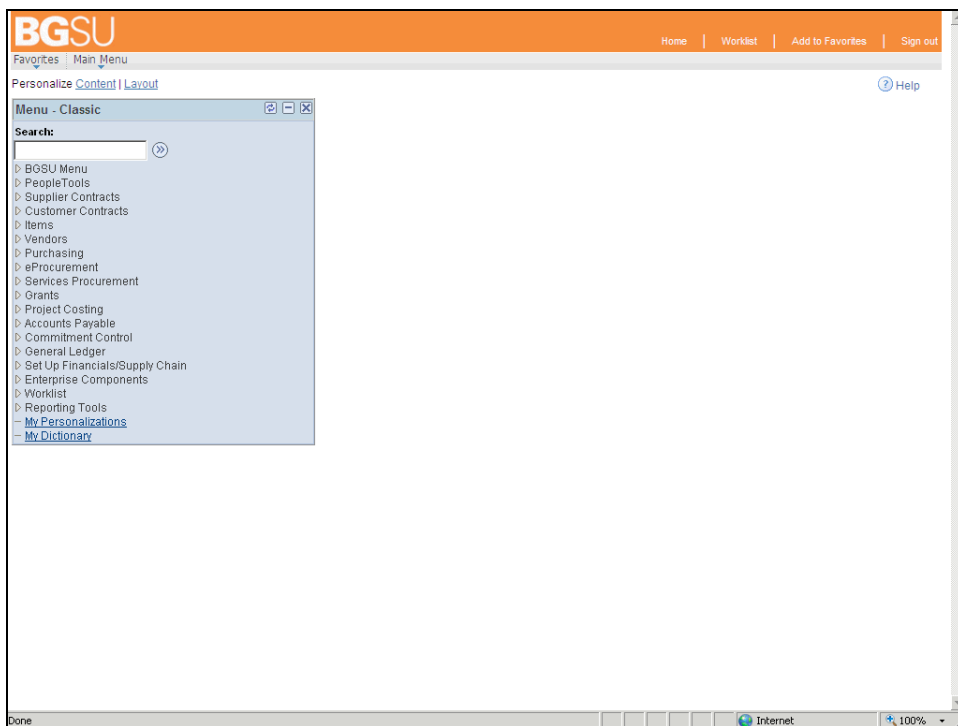



FMSv9.1



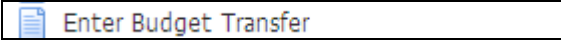
Customizing the Budget Transfer Journal Line

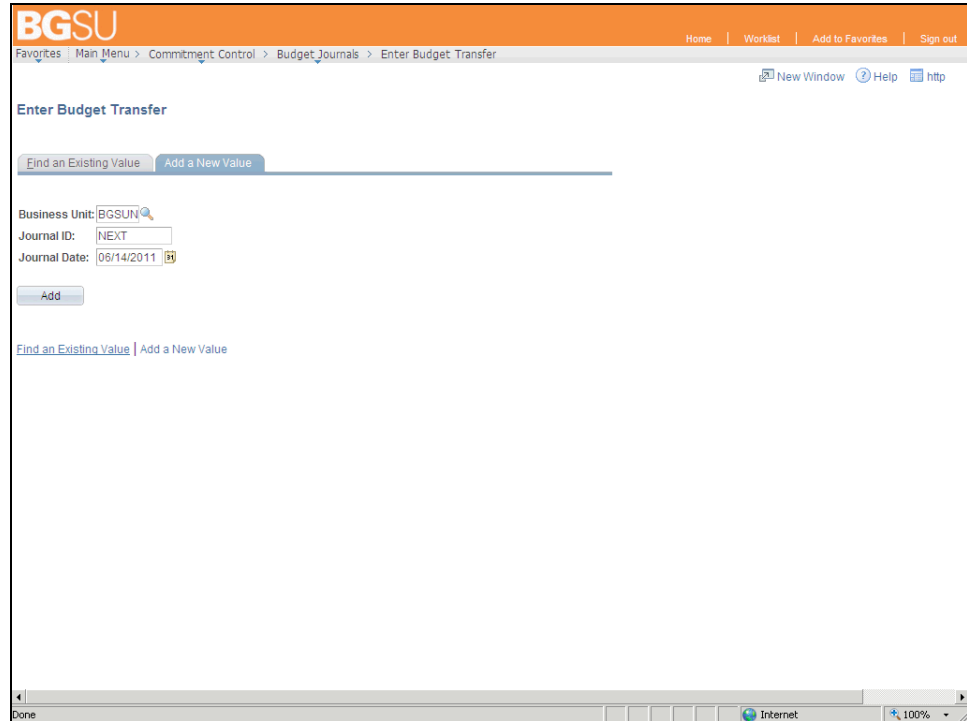
Procedure

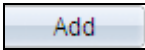


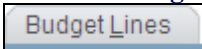
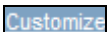
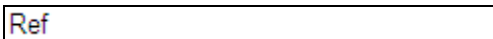
Before you enter a budget transfer you may want to customize the budget transfer line so that transfers are easier to input. You only need to customize the line one time. The system will save your customizations for all future transfers. This exercise takes you through the steps for customizing the line.


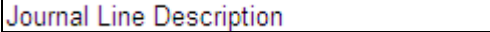



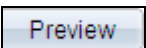


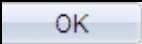
Step	Action
1.	You customize the Budget Transfer Line on the same page where you actually enter a budget transfer. To begin navigating to the Enter Budget Transfer component open the Main Menu . Click the Main Menu link. 

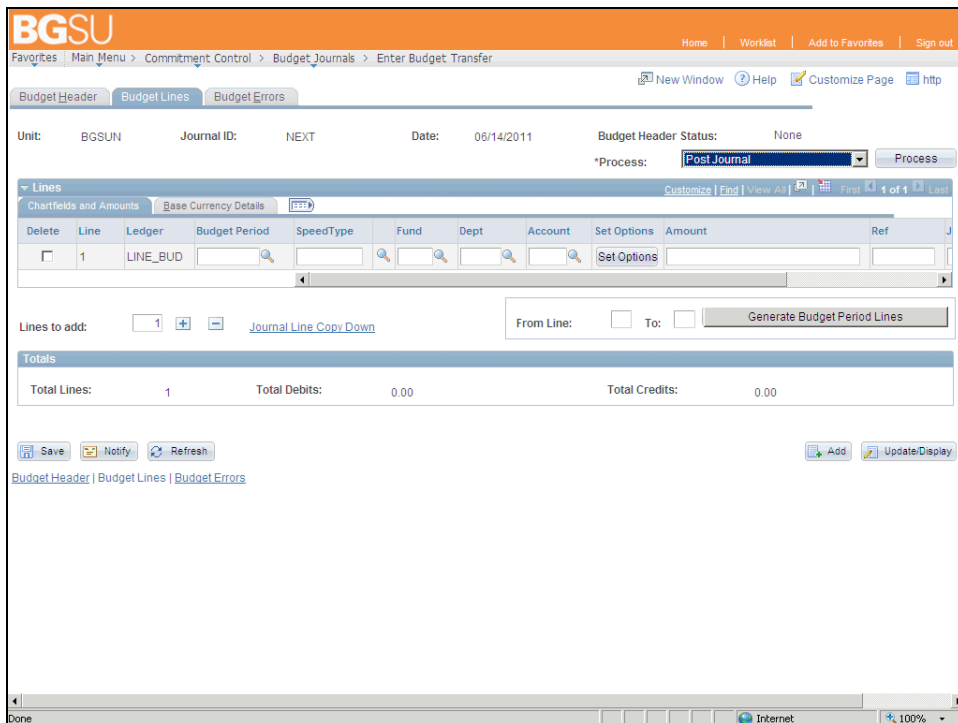
Step	Action
2.	<p>Commitment Control found on the Main Menu refers to controlling the financial commitments made by the university. Anything related to budgets will be found under Commitment Control.</p> <p>Click the Commitment Control menu.</p> 
3.	<p>Budget entry functions are in the Budget Journals menu.</p> <p>Click the Budget Journals menu.</p> 
4.	<p>Click the Enter Budget Transfer menu.</p> 




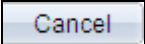
Step	Action
5.	<p>You need to be entering or viewing a budget transfer to customize how budget transfer lines appear. The easiest way is to start the process of adding a budget transfer.</p> <p>You will begin adding the transfer but will not save it; you are only starting the process of adding a transfer in order to customize the transfer line.</p> <p>Click the Add button.</p> 
6.	<p>Before you can customize the budget line you have to select the appropriate ledger group.</p> <p>Click the Look up Ledger Group (Alt+5) button.</p> 
7.	<p>For this exercise, select the Pool Ledger Group.</p> <p>Click the CC_LINE_AP link.</p> 
8.	<p>Budget transfer lines are shown on the Budget Lines page.</p> <p>Click the Budget Lines tab.</p> 
9.	<p>You may add fields to or remove fields from the Lines grid. You may also reorder the fields that are displayed.</p> <p>You do this by <i>customizing</i> the grid.</p> <p>Click the Customize link.</p> 
10.	<p>All the fields for the Lines section are now displayed. You are going to rearrange the order in which these fields are displayed and you are going to hide one of the fields.</p> <p>First you want to move the Ref field so that it comes after the Amount field.</p> <p>Click the Ref list item.</p> 

Step	Action
11.	<p>With each click of the Move Up button the Ref field moves up one spot.</p> <p>Click the Move Up button until Ref follows Amount in the Column Order list. For the purposes of this exercise you only have to click the Move Up button one time, but you will have to click it repeatedly when you perform this step on your computer.</p> <p>Click the Move Up button.</p> 
12.	<p>You want to move the Journal Line Description field so that it comes after the Ref field.</p> <p>Click the Journal Line Description list item.</p> 
13.	<p>With each click of the Move Up button the Journal Line Description field moves up one spot.</p> <p>Click the Move Up button until Journal Line Description follows Ref in the Column Order list. For the purposes of this exercise you only have to click the Move Up button one time, but you will have to click it repeatedly when you perform this step on your computer.</p> <p>Click the Move Up button.</p> 
14.	<p>Next you want to hide the Currency field, which you will never use.</p> <p>Click the Currency list item.</p> 
15.	<p>Click the Hidden option.</p> 
16.	<p>When you customize your budget line on your computer the Column Order list should look exactly like what is shown here.</p> <p>Click the Preview button.</p> 

Step	Action
17.	<p>A preview of what your budget journal line will look like is displayed.</p> <p>Observe that Ref and Journal Line Description now immediately follow Amount.</p> <p>Click the OK button.</p> 



Step	Action
18.	<p>Clicking the OK button saves your line customization. You have finished customizing the appearance of budget transfer lines.</p> <p>Click the Sign out link.</p> 

Step	Action
19.	<p>You do not need to save anything on this page in order to save your line customization. Once you clicked the OK button, your customization was saved.</p> <p>This warning appears because you started adding a new budget transfer entry. You do not need to save this entry.</p> <p>Click the Cancel button.</p> 
20.	<p>Congratulations!! You now know how to customize the Budget Transfer Line. The <i>Creating a Budget Transfer</i> tutorial assumes that you have made this customization on your computer.</p> <p>End of Procedure.</p>