

Send Back to Initiator

Transaction Code: Universal Worklist tab

Location(s): myNKU → UWL tab

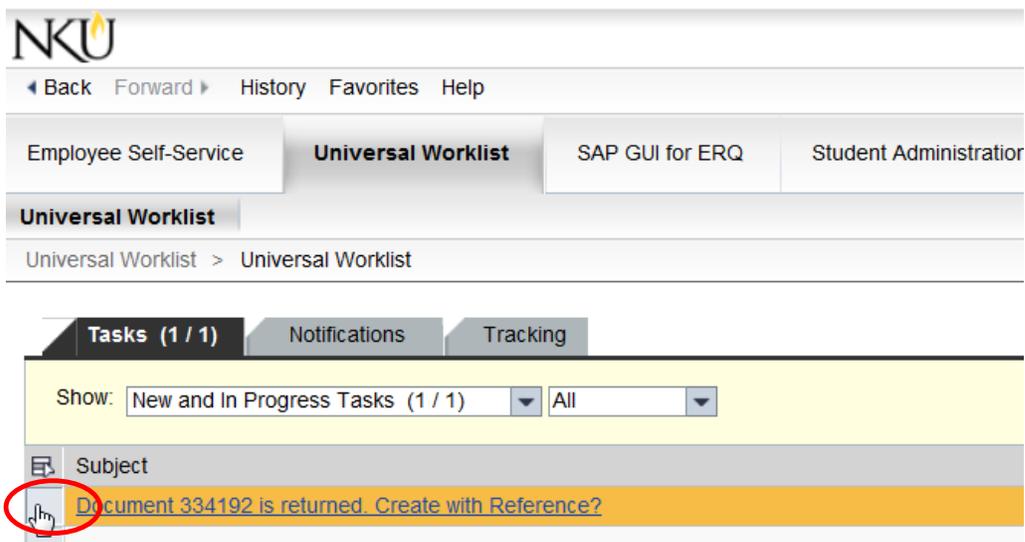
Purpose: An approver can send a budget transfer back to the initiator to create another budget transfer with reference via Universal Worklist. This is achieved via the Universal Worklist tab and Tasks sub-tab, as well as the creation of new attachments.

[Send Back to Initiator](#)

[Attachments](#)

Send Back to Initiator

1. Select the Universal Worklist tab.
2. Select the Tasks subtab.
3. Select the subject line to review.



4. Quick information regarding the budget transfer, as well as why it was sent back to initiator, will appear at the bottom of the screen.

Subject
[Document 334192 is returned. Create with Reference?](#)

Document 334192 is returned. Create with Reference?

Sent Date: Today by Training17, Student
Status: New
Description: This budget transfer has been returned. Would you like to create with reference?
Budget Transfer 334192
Fiscal Year 2015
Initiated by USTRAINING17 on 08/26/2015
Long Text:
see attachment

Notes
Reason for alternative: Send Back to Initiator - Aug 26, 2015 - Eileen Baker
Dollar amount should be 2500. Please include attachments as well.

5. Select the budget transfer (displays as **Create with Reference?**) by clicking the Subject or underlined hyperlink.

Tasks (1 / 1) Notifications Tracking

Show: New and In Progress Tasks (1 / 1) All

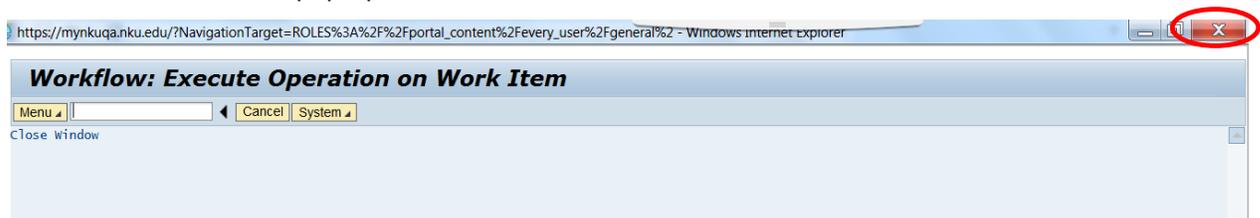
Subject
[Document 334192 is returned. Create with Reference?](#)

- Click Yes to Create with Reference.

Note: When selecting Yes, the funds for the previous budget transfer are uncommitted/no longer preposted. This may be viewed using transaction code ZFB1. The new budget transfer will be executed before other items commit the budget.

- No confirmation message will display

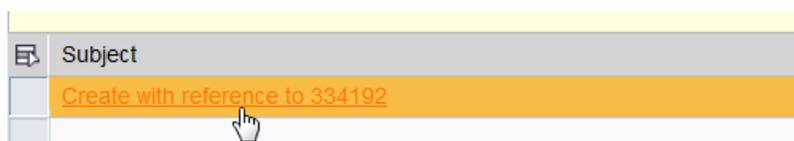
- Click the 'X' to close the pop-up window and return to the UWL tab.



- Click the refresh icon towards the right to update the task list in UWL.



- Select the new task 'Create with reference...' by clicking the Subject or underlined hyperlink.



- The budget transfer landing page will display.

10. Update the Payment Budget tab as instructed.

Payment Budget									
Lines									
Doc. Line	+/	Funds Center	Name of a Funds Center	Cmmt Item	Commitment Item Name	Amount (USD)	Text	Fund	Fu
000001	-	21	Student Account Svc	550000	Operating Pool-Op ST	2500.00	transfer between cost centers	0111000100	06
000002	+	21	Accounts Payable	550000	Operating Pool-Op ST	2500.00	transfer between cost centers	0111000100	06

11. Click Long Text to enter the required text.

Note: The long text from the original budget transfer will not be imported to the new budget transfer.

Long Text

12. Click Save to save the long text entry.

Change HHM Budget Entry Document: zXE

Menu | Save | Back | Exit | Cancel | System | Select Te

Row Text

.....1.....2.....3.....4.....5.....6.....7..

Increased dollar amount from \$25 to \$2500 per instruction.

- A confirmation message that the text was saved will display.

Text has been saved temporarily in the main memory, see long text

13. Click Back to return to the budget transfer transaction.

Change HHM Budget Entry Document: zXE

Menu | Save | Back | Exit | Cancel | System | Select Te

Row Text

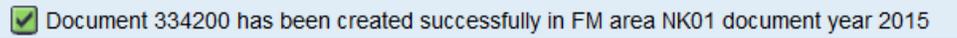
.....1.....2.....3.....4.....5.....6.....7..

Increased dollar amount from \$25 to \$2500 per instruction.

14. Click Prepost to generate a new budget transfer number.



- A confirmation message and **new budget number** will display.



- The first approver in the workflow will receive the new budget transfer to process.

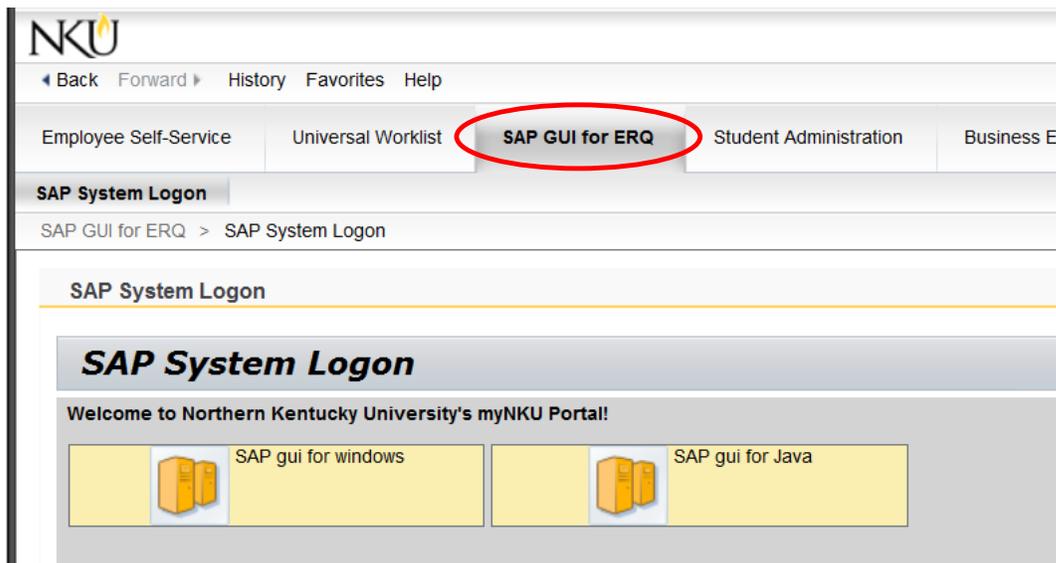
15. Click the 'X' to close the budget transfer window and return to UWL.

Doc. Line	Funds Center	Name of a Funds Center	Commit Item	Commitment Item Name	Amount (USD)	Text	Fund	Functional A
000001	213030001	Student Account Svc	550000	Operating Pool-Op ST	2,500.00	transfer between cost centers	0111000100	0600
000002	213020001	Accounts Payable	550000	Operating Pool-Op ST	2,500.00	transfer between cost centers	0111000100	0600

Attachments

The Services for Object icon, where the initiator is able to create attachments, is not available on the Create with Reference screen. Once the new document number for the budget transfer is created, the initiator or any approver may create attachments using transaction code FMEDD. Once a document is attached, the approvers in workflow are able to view them using Services for Object.

1. Log into myNKU.
2. Click the SAP GUI tab.
3. Select SAP gui for windows (PC users) or SAP gui for Java (Mac users)

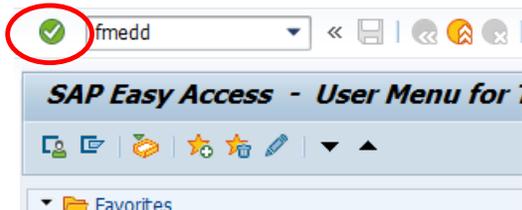


- Click Open for SAP GUI to open.



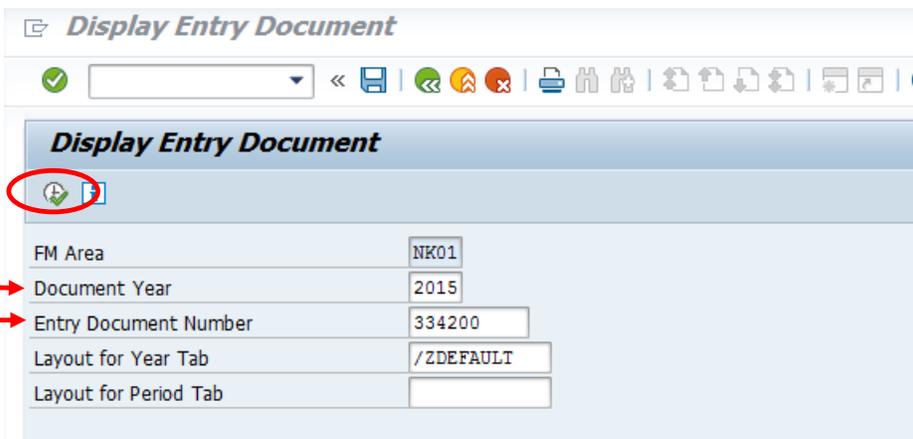
4. In the Command Field, enter transaction FMEDD.
5. Click the green checkmark or hit Enter on the keyboard to continue.

Note: The transaction is not case sensitive.

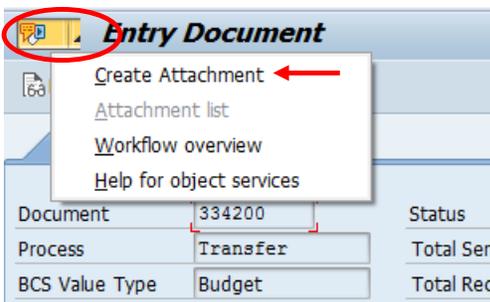


6. FM Area is always NK01.
7. Enter the Document Year (fiscal year).

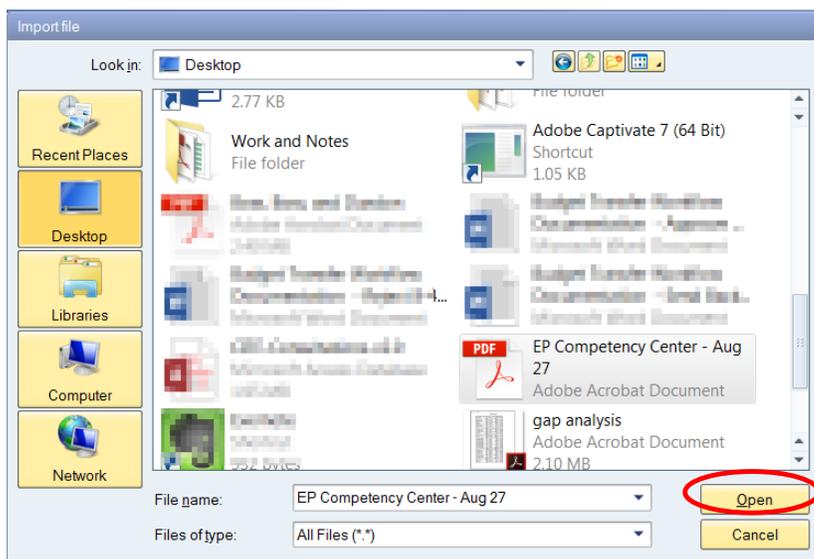
8. Enter the Entry Document Number (new budget transfer number).
9. Click Execute.



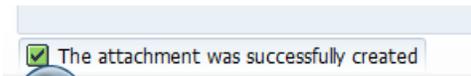
10. Click Services for Object to the left of the name bar.
11. Click Create Attachment.



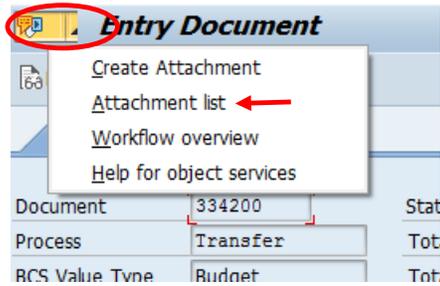
- Browse your computer until you locate the document you wish to attach.
- Select the document and click Open.



- A confirmation message will display.



- Click the Services for Object, Attachment list to view created attachments.



- Within the Attachment list dialog box you may display or delete attachments.

