

# Approve/Reject/Send Back to Initiator for Budget Transfer

Universal Worklist Tab

#### Location(s): UWL

**Purpose:** All budget transfers need the review of the person responsible for the funds center; this person has the ability to Approve, Reject, or Send Back to Initiator. The budget transfer requires the approval of the person responsible for the funds center, the Office of the Comptroller, and in some instances, the Budget Office.

- 1. Log into myNKU.
- 2. Select the Universal Worklist tab.
- 3. Select the Tasks subtab.

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<ul> <li>▲ Ba</li> </ul>	k Forward History Favorites Help
Hon	Universal Worklist Employee Self-Service Academic Advising Student Admini
Univ	ersal Worklist
Univ	rsal Worklist > Universal Worklist
; •	IOW: New and In Progress Tasks (7 / 11)
	Requisition 10064590 00010
	Budget Transfer 340084 001
	Budget Transfer 340083 001
	Budget Transfer 340082 001
	Travel Expenses for Trip 0000018621 for Training 18
	Travel Evidences for Trin 0000018646 for Training 23

4. Select the Subject line to review.

	Tasks (7 / 11) Notifications Tracking
s	how: New and In Progress Tasks (7 / 11)  All
₽	Subject
	Requisition 10064590 00010
վեր	Budget Transfer 340084 001
	Budget Transfer 340083 001



5. Quick information regarding the budget transfer will appear at the bottom of the screen.

7	Tasks (7 / 11)	Notifications Tracking			
\$	Show: New and In Prog	ess Tasks (7 / 11) 💌 All 💌			
₽	Subject		- İ	From	
	Reported 1018-081			Training16, S	tudent
	Budget Transfer 3400	34 001		Training19, St	udent
	Budget Transfer 3400	33 001		Training18, St	udent
	Budget Transfer 3400	32 001		Training16, St	udent
	Louis Reprints to 1	a beliefensele ster Tannen ne		Training18, S	tudent
	Transf. Topotters for T	a memory and the second s		Training23, S	tudent
	Transf. Toporture for T	a management of the second		Training24, S	tudent
	The Doctor C.T.	A DOD THE THE WAY OF		Training16, S	tudent
	No.000100-010	8.9		Training16, St	udent
	Town Expense to 1	a biographic to Transport		Training16, S	tudent
E	Budget Transfer 340	084 001			
S	Sent Date:	Yesterday by Training19, Student			
S	status:	In Progress			
C	Description:	Please approve, reject, or send back to initiator the following budget transfer.			
		Budget Transfer 340084 Fiscal Year 2016			
		Initiated by USTRAINING19 on 08/24/2015			
		Long Text:			
		Transferring between GLs			
A	ttachments:				
	Type Title	C	reated (	On	Created By
	Budgeting	Entry Doc: 0000340084			

• Click the hyperlink "Budgeting Entry Doc: xxxxxxxxx" to view budget transfer detail such as Fund Center name

Attachments	:
Туре	Title
<u> </u>	Budgeting Entry Doc: 0000340084



- The information will be displayed
- Click Cancel to close the Entry Document

Entry	Docum	ent							
Menu 🖌		Back	Exi Canc	el System 🖌	Lo	ng Text			
Header	r Additio	onal Data							
Document	3400	84	Status		Prep	osted	Doci	ument Year	2016 FM Area
Process	Tran	sfer	Total Ser	nder	50.0	0	USD		
BCS Value Ty	pe Budg	et	Total Red	eiver	50.0	0	USD		
Budget Categ	ory Paym	ent	Version		0		Fisc	al Year	2016
Document typ	е NK01		Documer	it Date	08/2	4/2015			
Year	Periods								
	問問∠		l <mark>@</mark> ₄ [		i				
-/+ Line	Funds Center	Name of a Funds	Center	Commitment I	tem	Commitment Item Name	Amo	unt Text	
- 000001	213020001	Accounts Payable	9	550000		Operating Pool-Op ST	50	).00 transfer b	etween GL
+ 000002	213020001	Accounts Payable	9	550000		Operating Pool-Op ST	50	0.00 transfer b	etween GL

• Close the Display Object window to return to the UWL tab of myNKU.



#### <u>Approve</u>

<u>Reject</u>

Send Back to Initiator



## Approve

1. Click the Subject or underlined hyperlink.



2. Click Approve Budget Transfer

**Note:** The Long Text, initiator, and date are still visible under the Description.

Decision Step in Workflow				
Menu 🖌 🤇 Cancel System 🖌 Workflow Create Import				
Budget Transfer 340082 001				
Choose one of the following alternatives				
Approve Budget Transfer				
Reject Budget Transfer				
Send Back to Initiator				
Cancel and keep work item in inbox				
Description				
Please approve, reject, or send back to initiator the following budget transfer.				
Budget Transfer 340082				
Fiscal Year 2016				
Initiated by USTRAINING16 on 08/24/2015				
Long Text:				
test				

- No confirmation message will display.
- Close the pop-up window to return to the UWL tab of myNKU.





## Reject

1. Click the Subject or underlined hyperlink.

Budget Transfer	340084	001
Rudget Trans	240002	001

2. Click Reject Budget Transfer.

	1	Decision Step in Workflow
	Me	enu 🖌 🤇 Cancel System 🖌 Workflow Create Import
		Budget Transfer 340084 001
		Choose one of the following alternatives
		Approve Budget Transfer
$\langle$	T	Reject Budget Transfer
		Send Back to Initiator
		Cancel and keep work item in inbox
		Description
		Please approve, reject, or send back to initiator the following budget transfer.
		Budget Transfer 340084
		Fiscal Year 2016
	ſ	Initiated by USTRAINING19 on 08/24/2015
		Long Text:
	l	Transferring between GLs

• A pop-up window will display, allowing for rejection reason to be entered.



- 3. Enter reason for rejection in Justify Your Decision text box.
- 4. Click Continue (the green checkmark) to save the justification.

**Note:** Once rejected, the workflow ends and the funds are uncommitted, and the budget transfer will be un-preposted. To view reason for rejection, click the Notifications tab in UWL.

Justify	Your	Decis	sion										×
Title				Reaso	n for alterr	native: Reject B	Budge	et Tra	nsfer				
These	GLs	are	unde	r the	pooled	operating	ŞŞ.	No	need	to	process.		
					-						•		

- No confirmation message will display.
- Close the pop-up window to return to the UWL tab.

https://mynkuqa.nku.edu/?Nav	vigationTarget=ROLES%3A%2	F%2Fportal_conten	t%2Fevery_user%2Fgene	eral%2	x
Workflow: Exe	ecute Operatio	n on Worl	k Item		
Menu 🖌					
Close Window					
				Content Area	
		SAP	► EF	RQ (200) 📲 🖌 hhiaa	p4500



## Send Back to Initiator

1. Select the Subject or underlined hyperlink.



2. Click Send Back to Initiator.



• A pop-up window will display, allowing to Initiator reason to be entered.



- 3. Enter the reason for the Budget Transfer to be sent back.
- 4. Click Continue (the green checkmark) to save the justification.

Justify Your Decision		×						
Title	Reason for alternative: Send Back to Initiator							
		_						
Dollar amount show	uld be 2500. Please include attachments as well.							
		]						

- No confirmation message will display.
- Close the pop-up window to return to the UWL tab.

https://mynkuqa.nku.ed	lu/?NavigationTarget=ROLES%3A%2F%2Fportal_conte	nt%2Fevery_user%2Fgeneral%2 🕒	
14/	Free suite On enstian an Wes		
worknow:	Execute Operation on wor	k Item	
Menu 🖌	Cancel System		
Close Window			-
		45	
•	SAD	ERO (200)	bbiaan/1500