# 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.
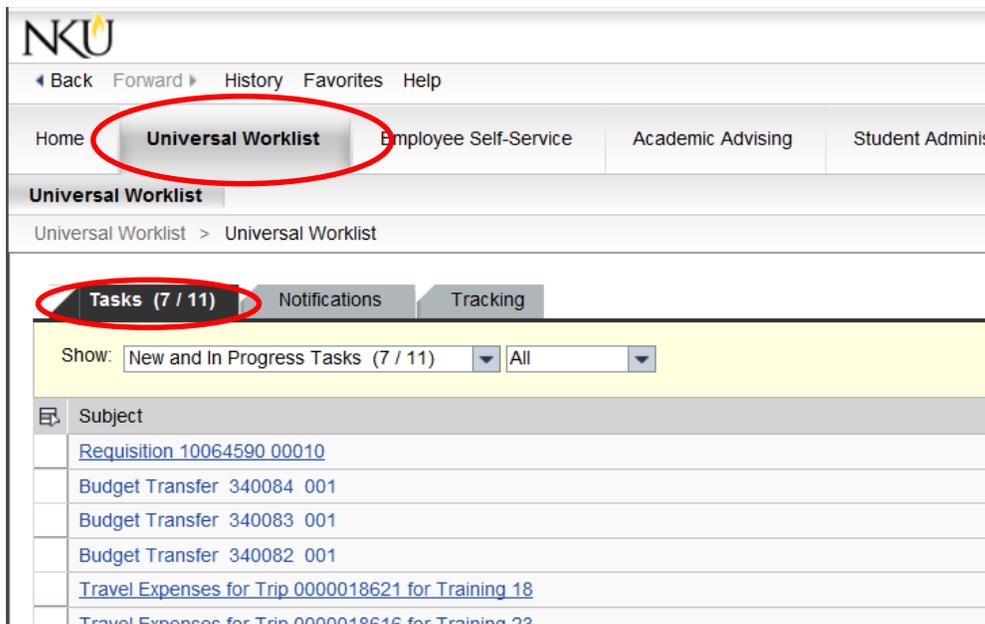
4. Select the Subject line to review.
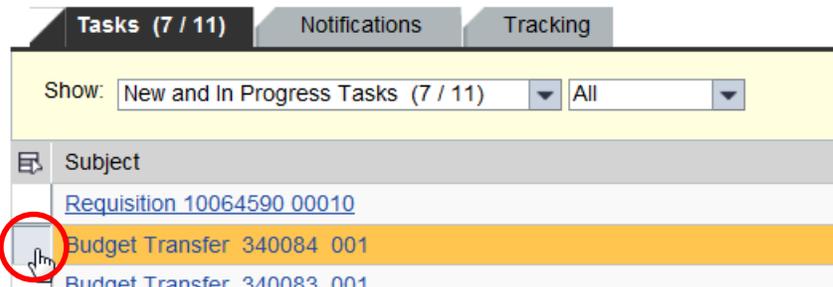
5. Quick information regarding the budget transfer will appear at the bottom of the screen.

Tasks (7 / 11)	Notifications	Tracking		

Show: | New and In Progress Tasks (7 / 11) | ▼ | All | ▼ |

	Subject	!	From
	~~Requested 123456789 01~~		**Training16, Student**
	Budget Transfer 340084 001		Training19, Student
	Budget Transfer 340083 001		Training18, Student
	Budget Transfer 340082 001		Training16, Student
	~~Travel Expenses for Trip 123456789 for Training 18~~		**Training18, Student**
	~~Travel Expenses for Trip 123456789 for Training 23~~		**Training23, Student**
	~~Travel Expenses for Trip 123456789 for Training 24~~		**Training24, Student**
	~~Travel Expenses for Trip 123456789 for Training 16~~		**Training16, Student**
	~~Requested 123456789 01~~		Training16, Student
	~~Travel Expenses for Trip 123456789 for Training 16~~		**Training16, Student**

Budget Transfer 340084 001

Sent Date:	Yesterday by Training19, Student
Status:	In Progress
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

Attachments:

Type	Title		Created On	Created By
📄	Budgeting Entry Doc: 0000340084			

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

Attachments:

Type	Title
📄	Budgeting Entry Doc: 0000340084

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

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

[Approve](#)

[Reject](#)

[Send Back to Initiator](#)

Approve

1. Click the Subject or underlined hyperlink.

    Budget Transfer_340082_001

    Travel Expenses for Trip 0000018621 for Training 18

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.

    https://mynkuqa.nku.edu/?NavigationTarget=ROLES%3A%2F%2Fportal_content%2Fevery_user%2Fgeneral%2 - ...

    ## Workflow: Execute Operation on Work Item

    Menu ▲ | | ◀ | Cancel | System ▲
    Close Window

Reject

1. Click the Subject or underlined hyperlink.

Budget Transfer_340084_001

Budget Trans[...]r_340083_001

2. Click Reject Budget Transfer.

Decision Step in Workflow

| Menu ▲ | | ◄ | Cancel | System ▲ | Workflow | Create | Import |

Budget Transfer 340084 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 340084

Fiscal Year 2016

Initiated by USTRAINING19 on 08/24/2015

Long Text:

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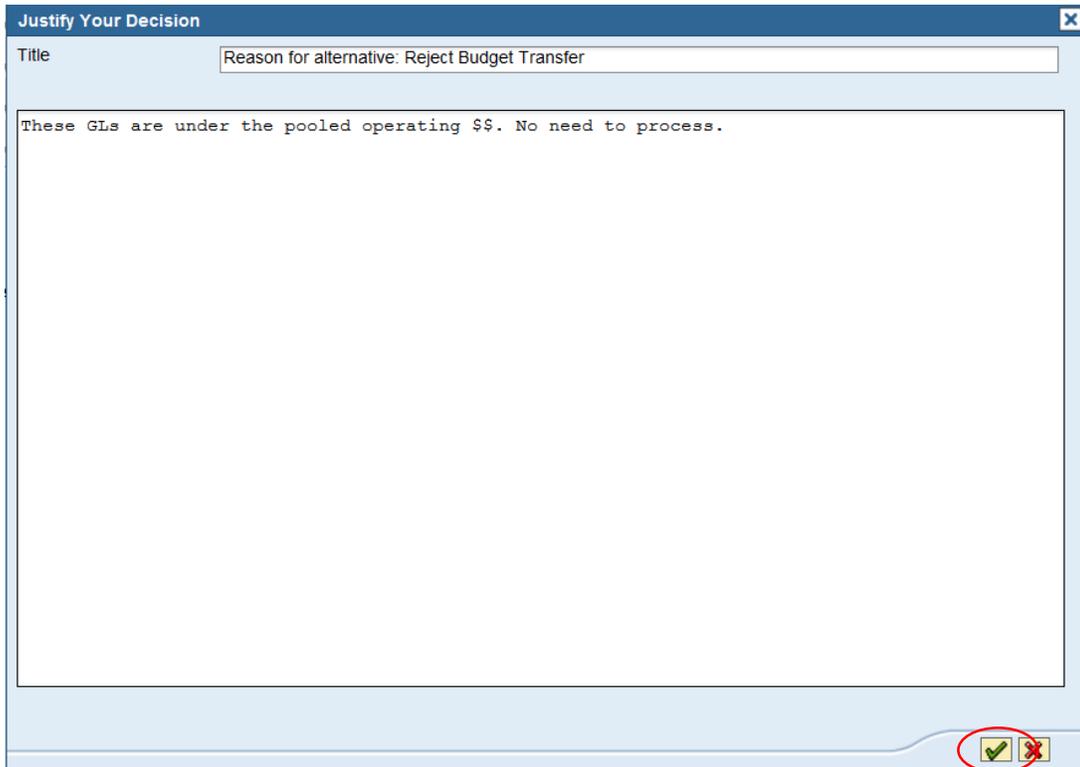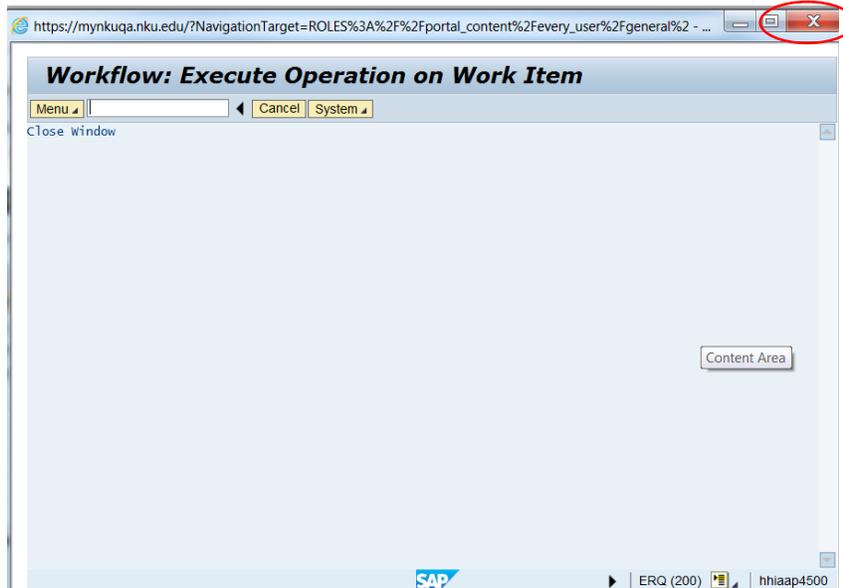
- A pop-up window will display, allowing for rejection reason to be entered.

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.
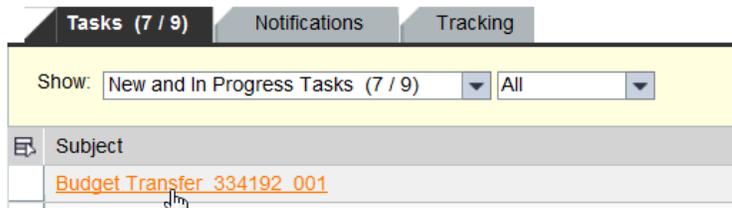

- No confirmation message will display.
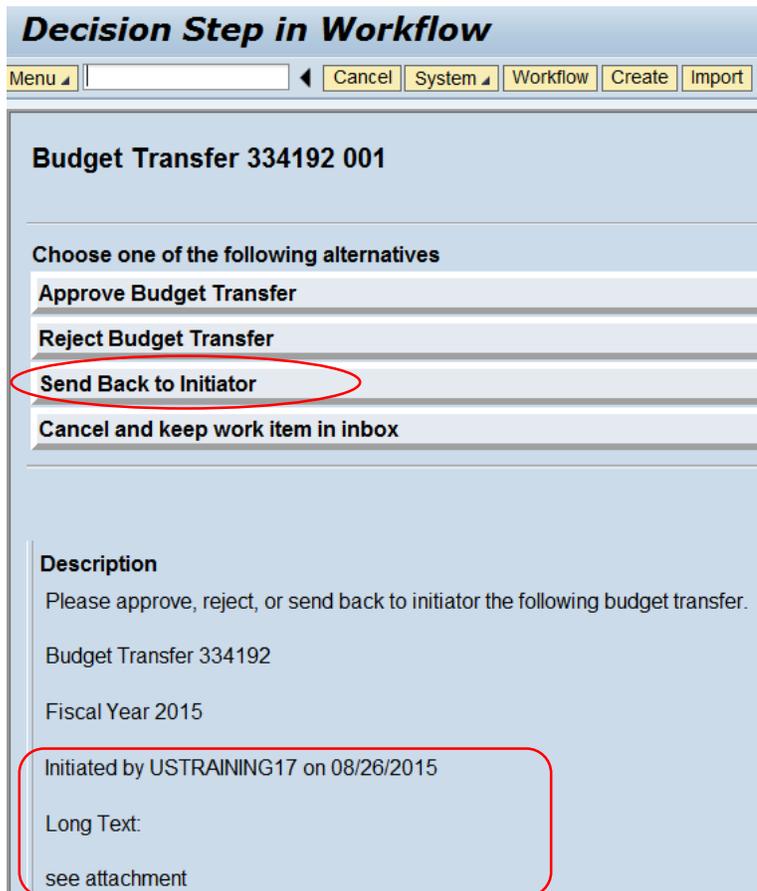- Close the pop-up window to return to the UWL tab.

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 should 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.edu/?NavigationTarget=ROLES%3A%2F%2Fportal_content%2Fevery_user%2Fgeneral%2...

Workflow: Execute Operation on Work Item

Menu ⬛ ◀ Cancel System ⬛

Close Window

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