University of Puget Sound Training Guides

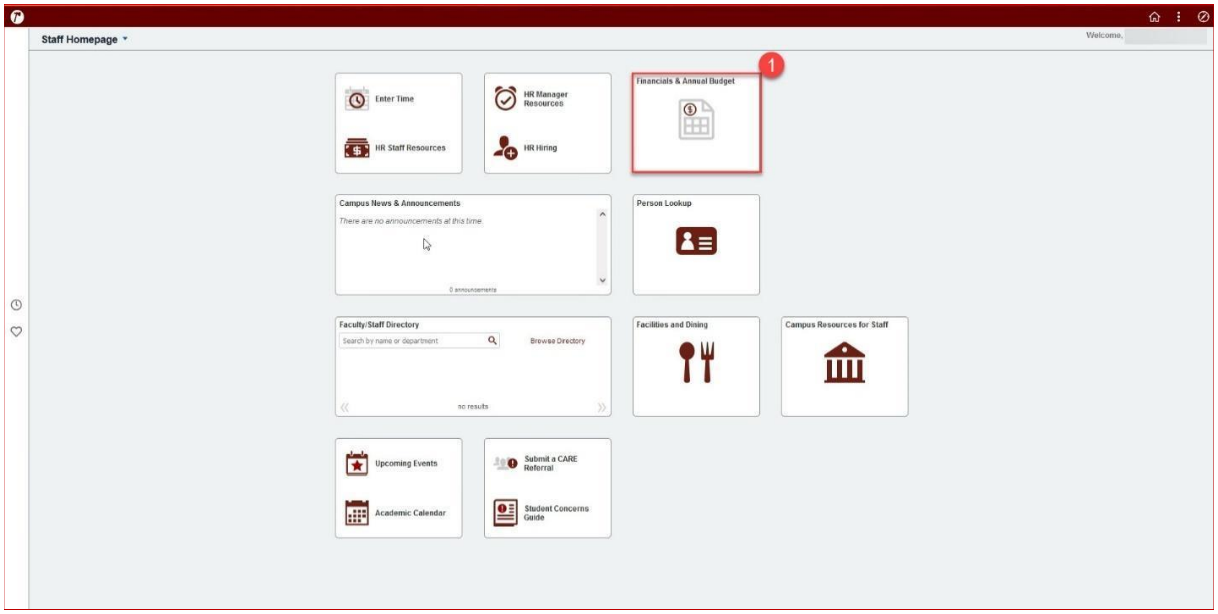
Create Transfer Request – Money Not Spent

Steps to create a Transfer Request when money has not yet been spent:

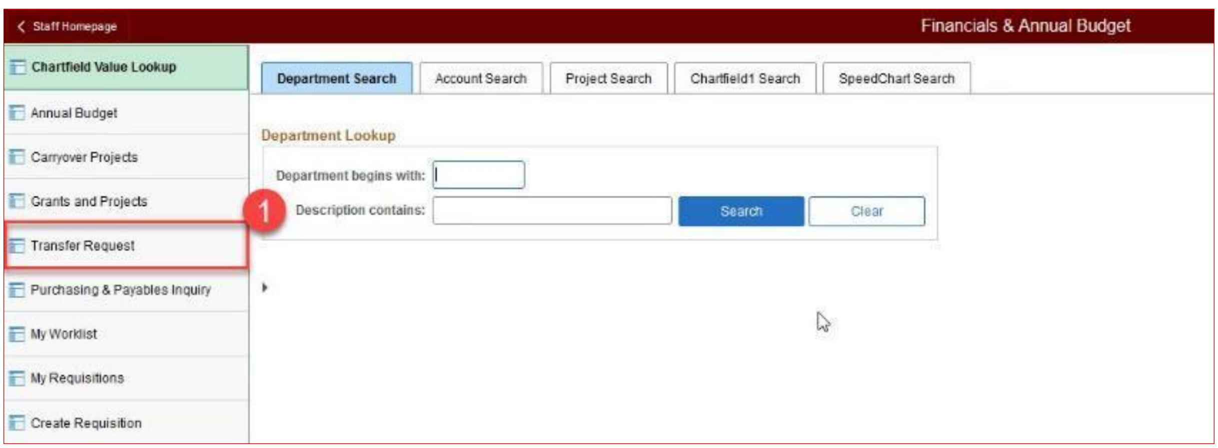
1. Click the **Financials & Annual Budget Tile**
2. Click the **Transfer Request** menu item
3. Click the **Create New Request** button
4. Enter the **Reason for Transfer, Fiscal Year,** and **Effective Date**
5. Select the **No** radio button
6. Enter the **SpeedChart** that you want to transfer From, the **Transfer Amount**, and the **SpeedChart** that you want to transfer To
7. Click the **Save for Later** button
8. Optionally, add any **Attachments**
9. Click the **Submit Request** button to submit your transfer request for approval

Read further for more detailed information about each step.

Navigate to the Transfer Request Page

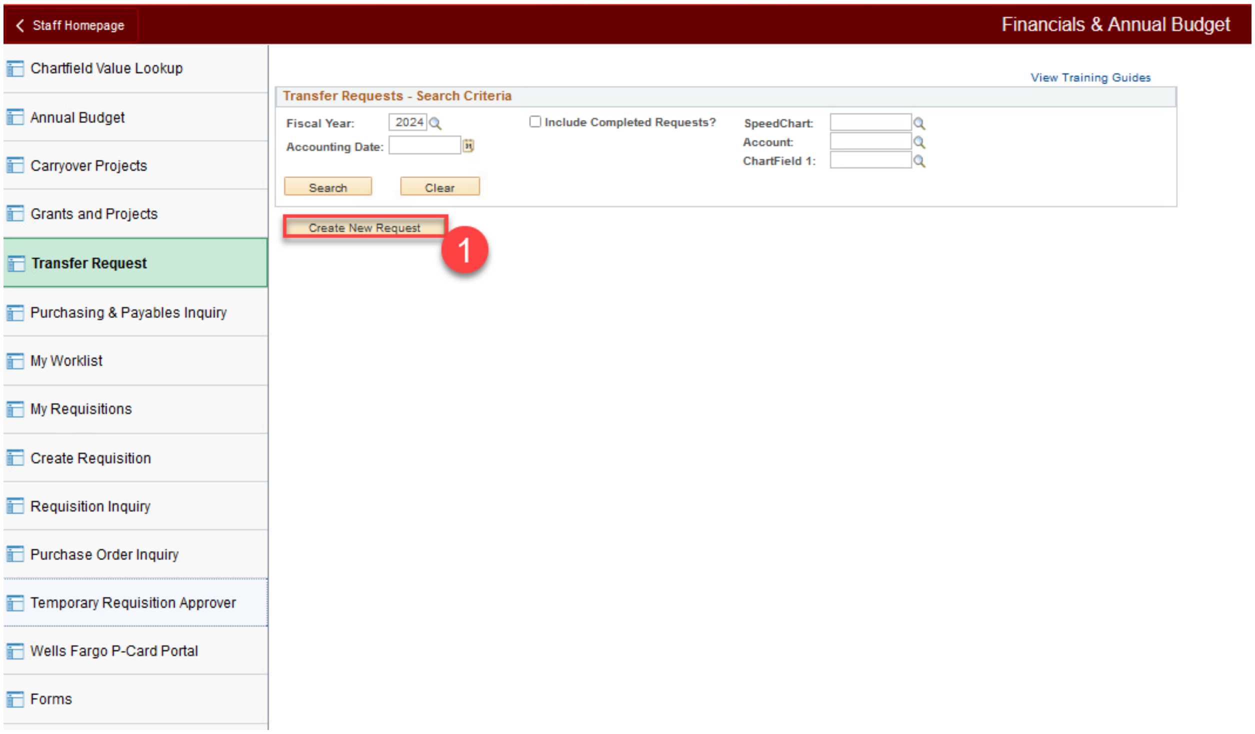


1. Click the **Financials & Annual Budget Tile**

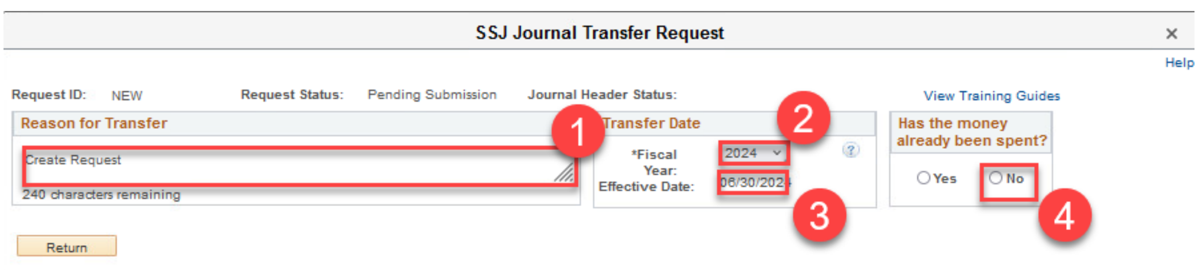


1. Click the **Transfer Request** menu item

Create a New Transfer Request

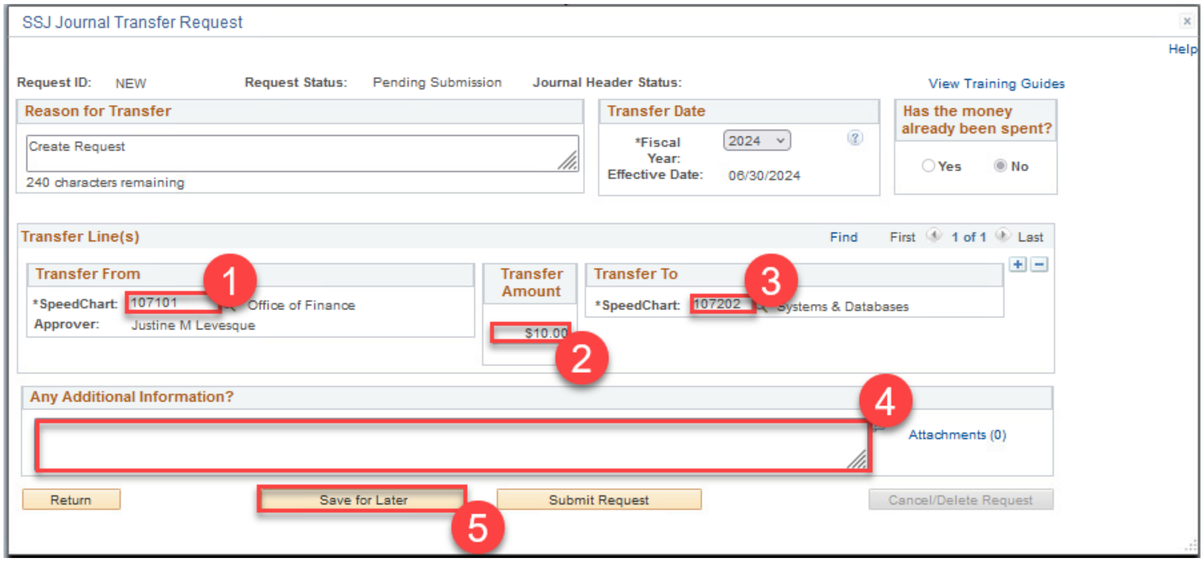


1. Click the **Create New Request** Button



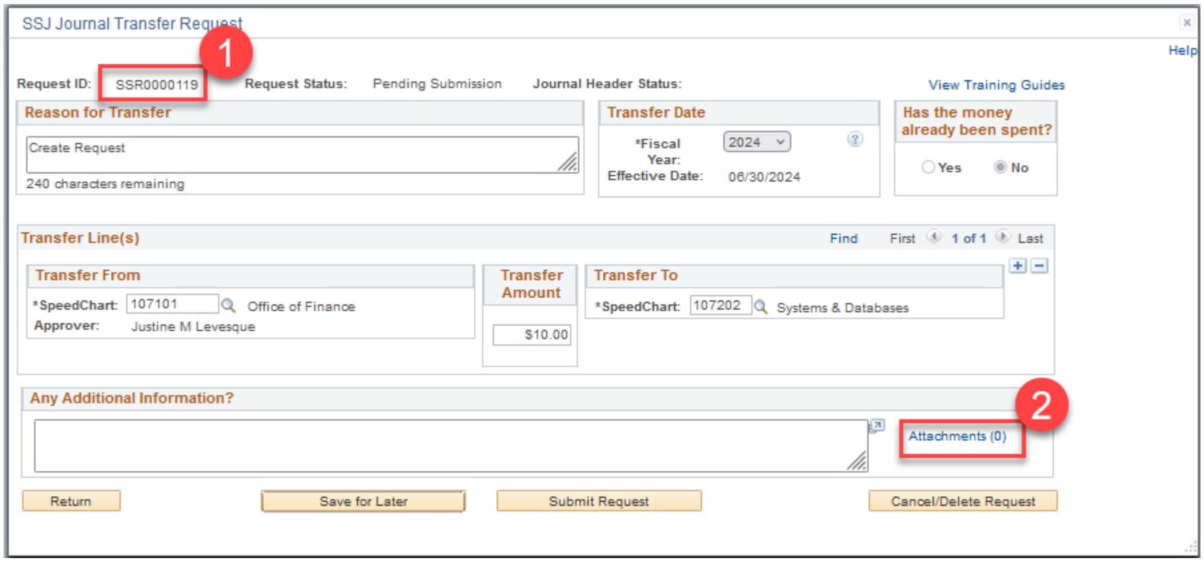
1. Enter the **Reason for Transfer-** use descriptive text see examples below (Feel free to add more <u>after</u> text similar to below examples)
    a. Transfer $100 to support Dept Speaker
    b. Transfer $100 to for copy services
    c. Transfer fr 107101.63030 to 107100.64520
2. Select the desired **Fiscal Year**
3. Enter the applicable **Effective Date** (when field is open/available)
4. Select the **No** Radio Button

Continue Entering the Transfer Request Details



1. Search and Select or Enter the **SpeedChart** for the Transfer From
2. Enter the **Transfer Amount**
3. Search and Select or Enter the **SpeedChart** for the Transfer To
4. Enter **Any Additional Information** (Optional)
5. Click the **Save for Later** Button

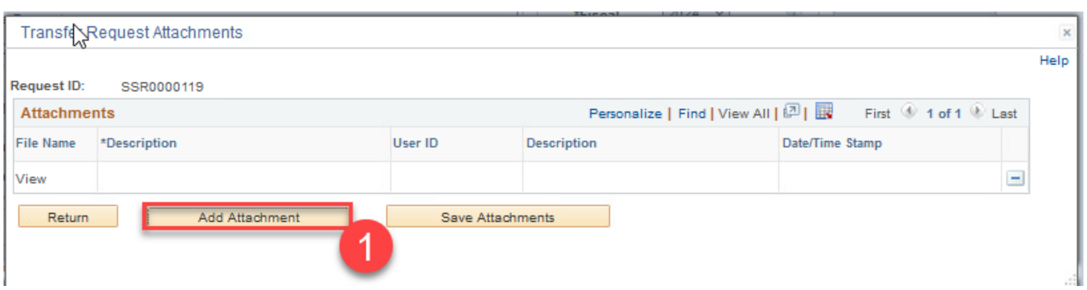
Continue Entering the Transfer Request Details and Add Attachment(s)



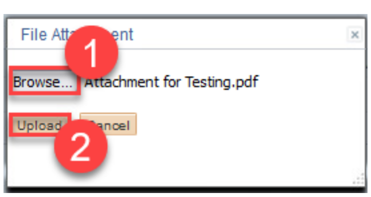
1. Confirm the assigned **Request ID**

   Attachments can be added to the Request ID after the initial entry has been saved and the Request ID has been assigned.

2. Click the **Attachments** Link to add an attachment

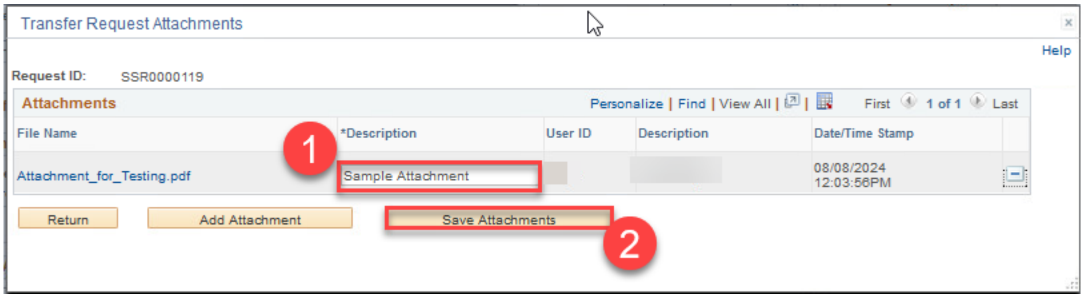


1. Click the **Add Attachments** Button



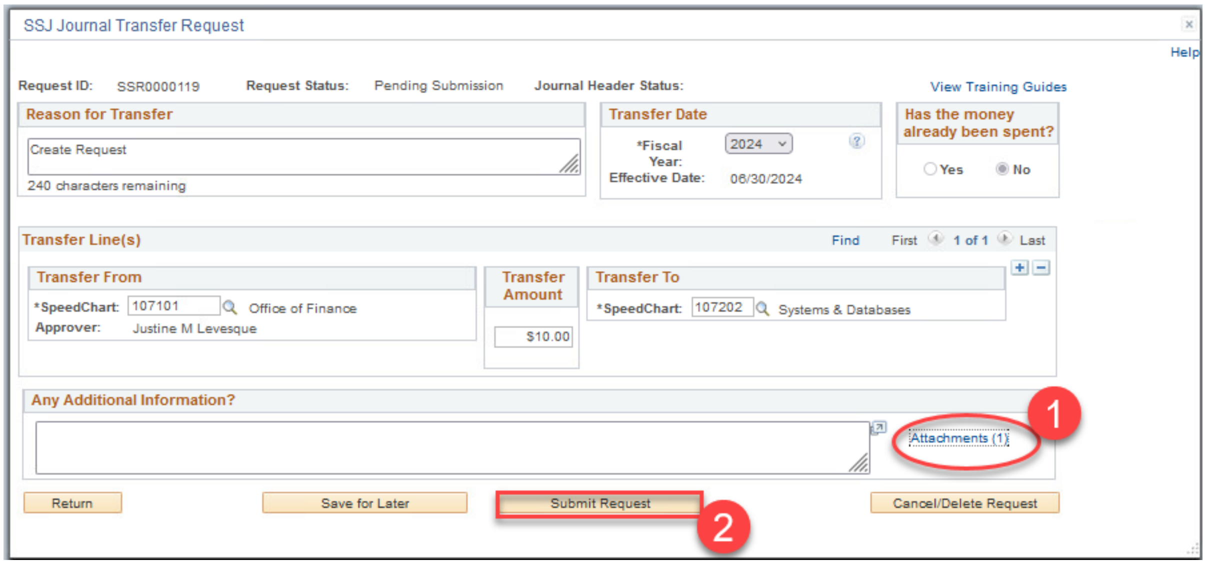
1. **Browse** and Select an Attachment
2. Click the **Upload** Button

Continue Entering the Transfer Request Details and Add Attachment(s)

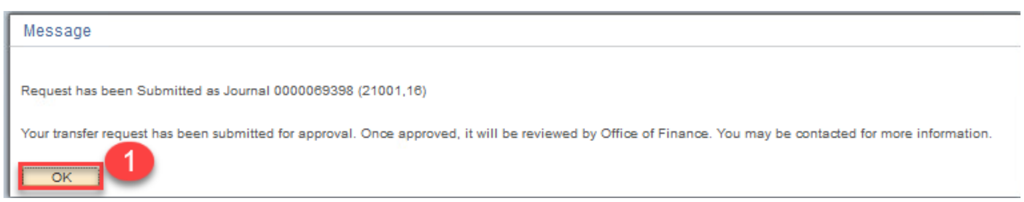


1. Add a **Description**
2. Click the **Save Attachments** Button

Continue Entering the Transfer Request Details and Submit Request



1. Confirm that the Attachments Link has been updated with the correct number of attachments
2. Click the **Submit Request** button to submit your transfer request for approval



1. Click **OK** to acknowledge the confirmation message and return to the Transfer Request Landing Page

– End of Job Aid –

Tips and Tricks:

Request Statuses:

1. Pending Submission - can only be deleted by the Created By user
2. Submitted
3. Pending Approval
4. Approved
5. Denied
6. Completed
7. Canceled