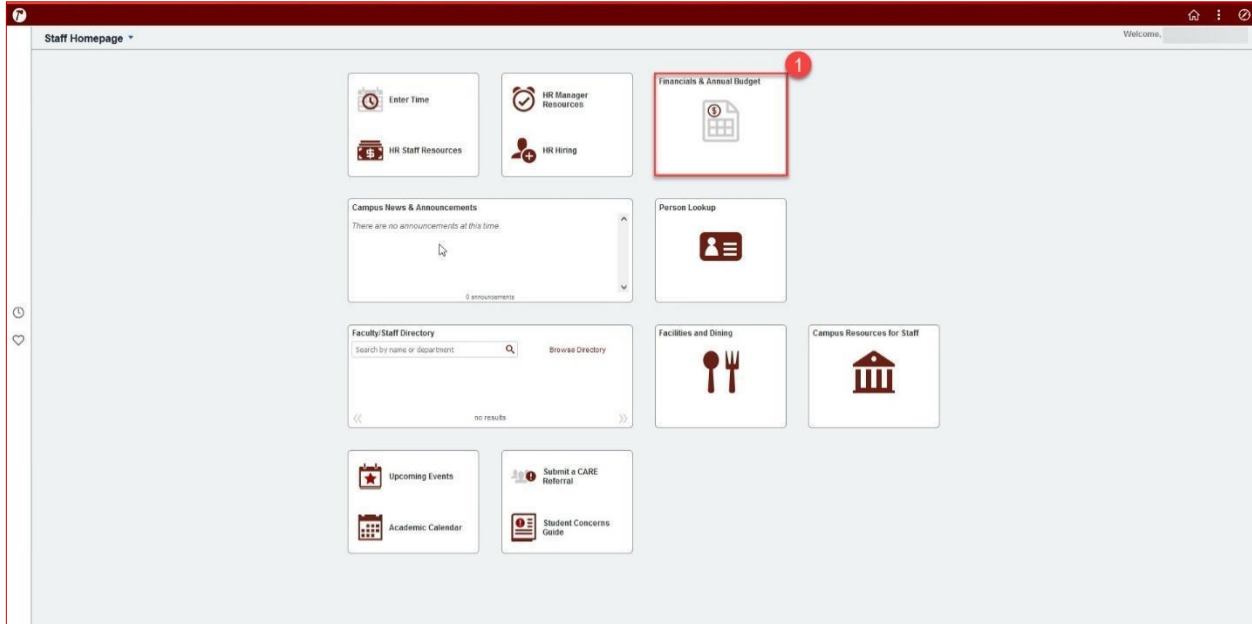


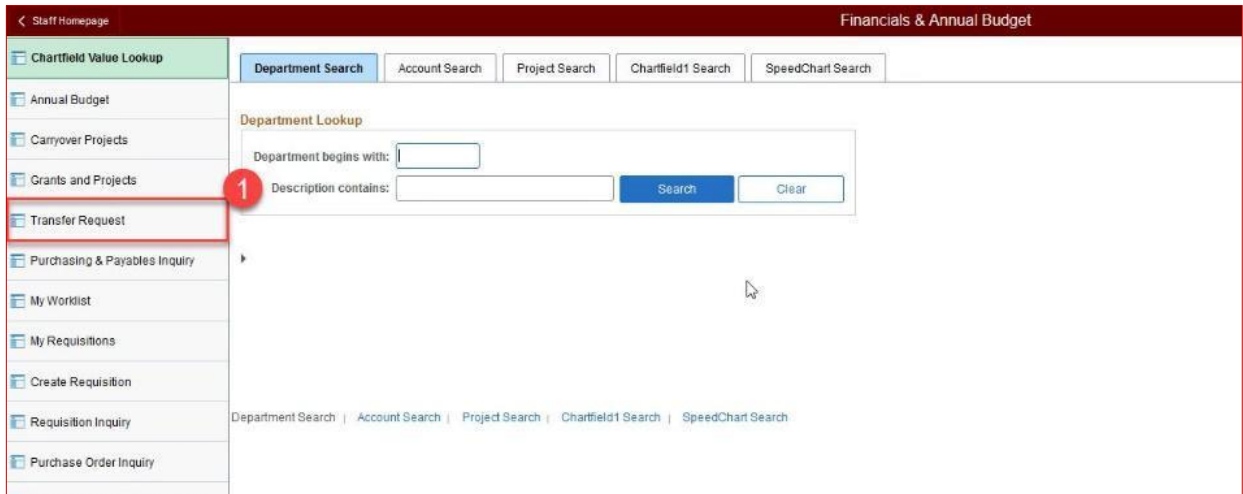
# University of Puget Sound Training Guides

## Search for a Transfer Request

Navigate to the Transfer Request Page



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



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

# University of Puget Sound Training Guides

## Search for a Transfer Request

Search for newly-created or existing Transfer Requests

The screenshot shows the 'Transfer Request' search interface. On the left, a sidebar lists various navigation options, with 'Transfer Request' highlighted. The main content area is titled 'Transfer Requests - Search Criteria'. It includes input fields for 'Fiscal Year' (set to 2024), 'Accounting Date', 'SpeedChart', 'Account', and 'ChartField 1'. There are 'Search' and 'Clear' buttons, and a 'Create New Request' button. Red callout boxes with numbers 1, 2, and 3 point to the 'Transfer Request' menu item, the 'Fiscal Year' field, and the 'Search' button respectively.

1. Enter desired **Fiscal Year** and **Chartfield (optional)** criteria. Optionally, you may also search by Accounting Date, or just look for Completed Requests.
2. Click the **Search** Button

The screenshot shows the 'Search Results' page. The search criteria are filled out: Fiscal Year: 2024, Accounting Date: 10/2024, SpeedChart: 107101, Account: Office of Finance, ChartField 1: [empty]. The results table has two entries:

View Request	Request ID	Accounting Date	Request Status	Created By	Date Submitted	Journal ID	Transfer From	Transfer Amount	Transfer To	Approver
	SSR000099	10/2024	Pending Approval		07/07/2024 10:09:38AM	0000069383	107101	\$3.00	107202	jlevesque
	SSR0000118	08/30/2024	Pending Approval		08/07/2024 2:24:31PM	0000069397	107101	\$79.23	107101	jlevesque

Red callout boxes with numbers 1 and 2 point to the magnifying glass icon and the 'Request ID' link of the first entry, respectively.

1. Click the **Magnifying Glass** to open the Transfer Request if you are the requester or the approver
2. Or Click the **Request ID** link to read the Transfer Request Description

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### 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