STEP-BY-STEP

GUIDE

APPROVING

A

BALANCED

BUDGET TRANSFER

**(OVERALL BUDGET IMPACT**

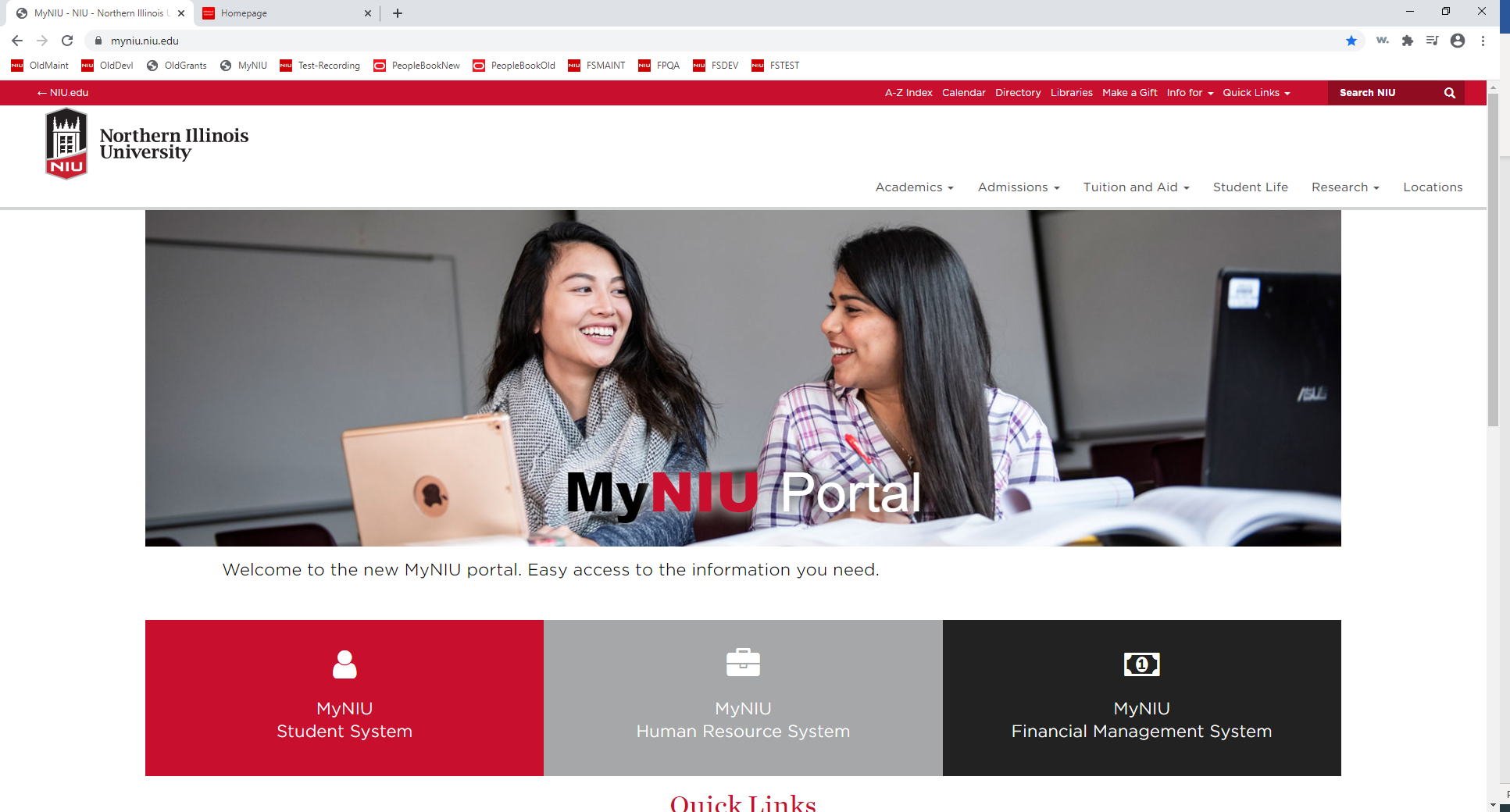
**IS NET ZERO)**

**Budget and Financial Planning**

**Northern Illinois University**

NIU Logo

1. **Navigate online to myniu.niu.edu and click “MyNIU Financial Management System”**



HINT: Approval via Call-to-Action E-Mail’s Direct Link (link to individual approval highlighted red below)

**From:** no-reply@niu.edu <no-reply@niu.edu>   
**Sent:** Date-Time Stamp of Action  
**To:** [Approver(s) of Balanced Budget Transfer]  
**Cc:** TransfersExceptions <TransfersExceptions@niu.edu>  
**Subject:** **Action Requested:** Review Balanced Budget Transfer Request [Transfer Number]

[Name of Approver n]:

A balanced budget transfer has been requested by [Name of Requestor] that requires your attention and approval before it can be posted. Please review the budget-neutral transfer at: [Link to PeopleSoft Workflow Routing Module]

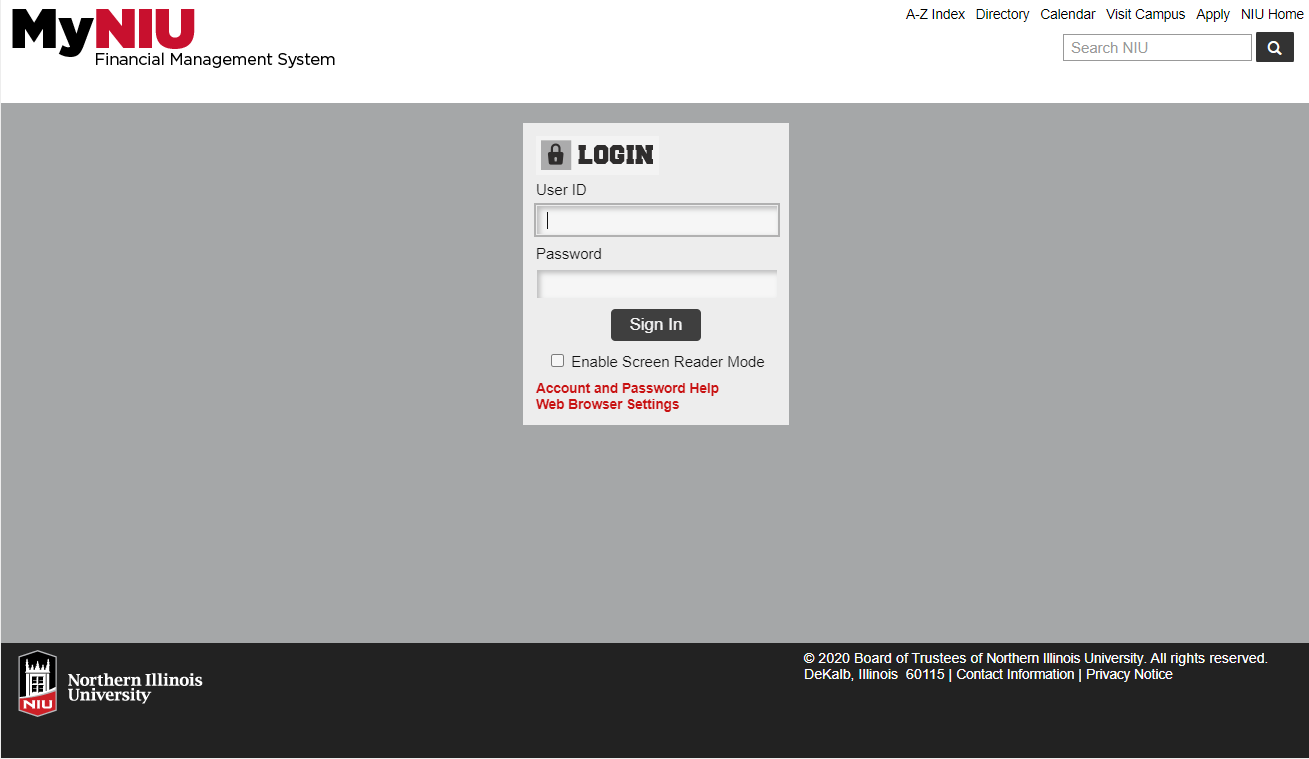
Once all necessary approvals are obtained through the workflow system, the transfer will post in the next processing cycle. Processing cycles are scheduled to run each hour, on the hour, from 7 a.m. to 7 p.m., Monday through Friday. Alternatively, the budget transfer may be manually posted after all necessary approvals are entered. Any approver may execute this manual posting process.

To see the status of the transfer please review the approval routing at: [Paste Link to Balanced Budget Transfer in PeopleSoft]

Thanks,  
The Budget Office

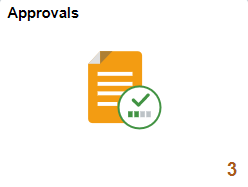
Budget & Financial Planning | Division of Administration & Finance  
230 Altgeld Hall | DeKalb, IL 60115  
815-753-1909 | [budgetandplanning@niu.edu](mailto:budgetandplanning@niu.edu)  
[www.niu.edu](http://www.niu.edu)

1. **Authorize with you A-ID and Password**



1. **Navigate to Approvals (Note: Number Denotes Outstanding Approvals of All Source Docs)**





Select “Approvals”



Select “MyNIU Budgets”

NOTE: Approval via Call-to-Action E-Mail’s Direct Link omits this step

1. **Approval Dashboard**

Screenshot of the approval dashboard. Four separate areas of the approval dashboard are called out with further detail, two of which are functional areas further described below in step 4a and 4b for approval and two are just informational items.

The first area is the navigational pane on the left hand side of the screen. Buttons on the navigational pane are acting as filters, which let the user distinguish between the different source documents. The current selection is always highlighted green. All-view displayed, and explained if selection Budget Journal to filter, mass approval is enabled. This is further described in step 4a.

Second call out is a notation that details about the individual source documents are listed, which is the amount and type of transaction. Depending on the view/filtering chosen, the transaction type might vary (i.e. requisitions and budget journals as depicted here). Note amounts here are aggregate and not by accounting line.

The third emphasis is also a notation. Towards the center of the screen is a summary of the most pertinent information of each workflow transaction outstanding approval. This includes a description, the PS org code (almost always NIUDK for our campus community), the document number (req number or transfer number), a date and for budget journals the type of the journal (original, adjustment, transfer adjustment or transfer original).

The fourth and final emphasis is for the button toward the right-hand side of the dashboard linked to the second and third call out discussed previously. This is used to navigate to further detail on an individual source document discussed further in approval of an individual budget journal in 4b.

Button to Review Detail of Transaction and Execute Individual Approval**b**

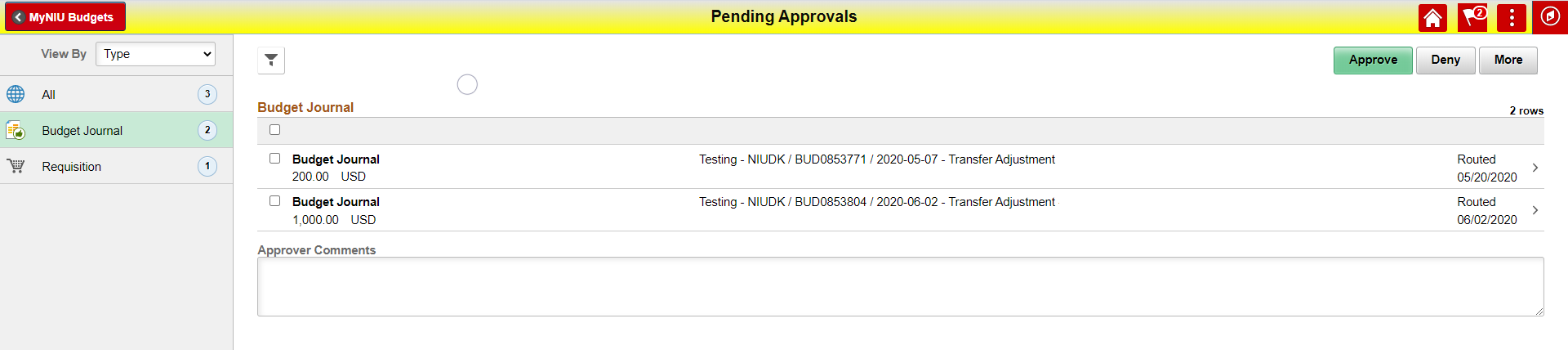
Most pertinent Information about Transaction like Description, Org, Source Doc Number, Date and Budget Transaction Type (i.e. “Transfer Adjustment”)\*

Transaction Type and Amount Displayed\*

Button to Filter for Budget Journals or Execute Mass Approvals**a**

NOTE: Approval via Call-to-Action E-Mail’s Direct Link omits this step 4. and automatically direct to 4.b.

1. **Mass Approval**



v.

iv.

iii.

ii.

i.

1. **Selection for Mass Approval Highlighted in Green (Validate to Avoid Accidents)**
2. **Only Checked Transactions will be Executed**
3. **Box for Approval Comments processed for Checked Budget Items**
4. **Buttons to Mass Execute**
5. **Like the “All Dashboard Overview” this can be selected to navigate to individual item for review and individual approval**
6. **Individual Approval**

Screenshot upon selecting an individual transaction as explained in 4 in the fourth emphasis.

This view shows the information of the transaction in more detail and there are five highlights of areas in this view, that are described below with small roman numerals 1 through 5.

The difference between roman numerals 1 and 2 is the area that indicates what PS calls header information (whom put the entry in, what is its source document number, what ledger does it post to, etc.), while roman numeral 2 is line information (what cost center funds this part of the transaction, the chart fields of the individual lines including fund, class, cost center etc.).

iv.

iii.

v.

ii.

i.

1. **Same information (more detail) than in “All-View” described in step 4. \***
2. **Same information (more detail) than in “All-View” described in step 4. \***
3. **Approval Comment for Checked Budget Items**
4. **Review of Approval Chain and Progress (Place to choose ad-hoc approver)**
5. **Buttons to Individually Execute**