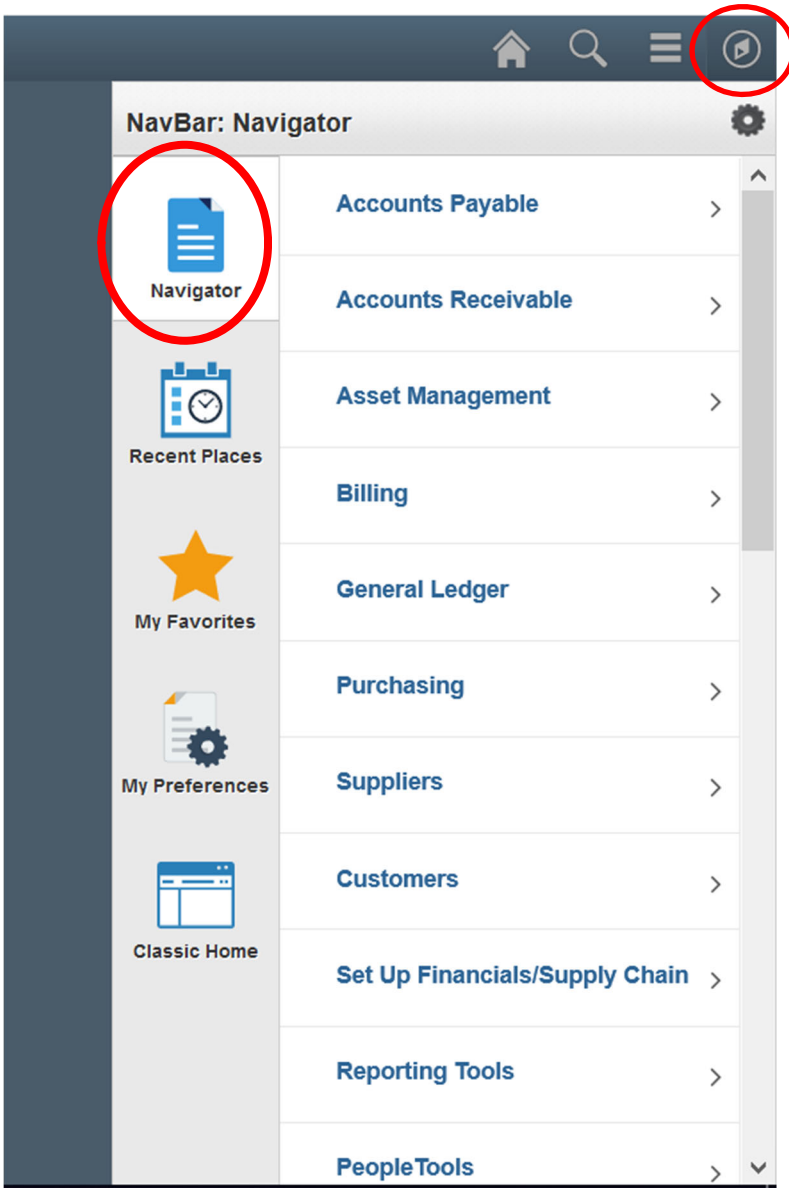


Looking Up Budget Transfers in CFS 9.2

- 1.) LOG INTO CFS.
- 2.) Click on the *Navigator* at the top right of the screen, then select the navigator tab, and click through the following thread: [General Ledger](#) > [Journals](#) > [Journal Entry](#) > [Create/Update Journal Entries](#)



- 3.) To find a budget transfer click the “find an existing value” tab.

The screenshot shows the 'Find an Existing Value' search form. A red arrow points to the 'Find an Existing Value' tab. The form includes a search criteria dropdown menu, a 'Use Saved Search' dropdown menu, and a 'Business Unit' field with a dropdown menu and a search button. The 'Business Unit' field is currently set to 'SMCMP'.

Looking Up Budget Transfers in CFS 9.2

There are a variety of ways in which budget transfers can be looked up. *Feel free to utilize one or more of the criteria listed below to search budget transfers.* Listed are the various search criteria available, as well as some tips and tricks for using them. Please refer to the image on the next page.

- Business Unit:** Make sure this field has the correct business unit. SMCMP will be the correct choice most of the time, however there are also other options for the auxiliaries and ASI.
- Journal ID:** This is the easiest and most effective way to search for a budget transfer. If you have the journal ID number I suggest changing the “begins with” to “contains,” and using the last six to seven digits of the journal ID that are not zeroes. I also suggest leaving all of the fields *except* “business unit” and “source” blank (see example on next page). Then click “search.”

Business Unit: = ▼ SMCMP

Journal ID: contains ▼ 521913

Journal Date: = ▼

Document Sequence Number: begins with ▼

Line Business Unit: = ▼

Journal Header Status: = ▼

Budget Checking Header Status: = ▼

Source: = ▼ BDG

Entered By: begins with ▼

Attachment Exist: = ▼

Search Clear Basic Search Save Search Criteria Delete Saved Search

The search results should provide the budget transfer that you are looking for. Click on the journal ID to review the budget transfer.

Search Results												
View All												
Business Unit	Journal ID	Journal Date	UnPost	Sequence	Document Sequence Number	Line Business Unit	Journal Header Status	Budget Checking Header Status	Ledger Group	Source	Currency Code	
SMCMP	0000521913	02/29/2014	0		(blank)	SMCMP	Posted	Valid	STANBUDG	BDG	USD	

If you do not have the Journal ID number there are also other options for looking up a budget transfer by using the following criteria.

- Journal Date:** Use “=” if you know the exact date of the transfer that you are looking for, otherwise select “between” and insert two dates to search within a date range.
- Document Sequence Number:** Leave this field blank.
- Line Business Unit:** Leave this field blank.

Looking Up Budget Transfers in CFS 9.2

- f) **Journal Header Status:** By leaving the status blank (like in the example above) a larger number of results will show up, however there are also more specific options depending on if you are searching for a posted journal, incomplete journal, etc.
- g) **Budget Checking Header Status:** Leave this field blank.
- h) **Source:** This should be “BDG.”
- i) **Entered By:** This should automatically be populated with your user ID, if not then enter it on this line.
- j) **Attachment Exist:** Leave this field blank.

After populating the chosen criteria for the search click “search.” The “search results” will list any of the budget transfers that fit the criteria used for the search. If you have any difficulty, or need assistance in searching for budget transfers, please contact The University Budget Office at Budget@csusm.edu.