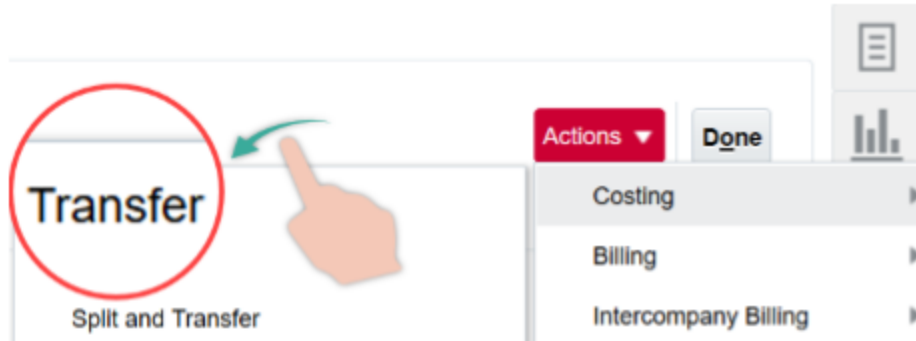


## PREPARER – TRANSFER TRANSACTION

1. A Transfer transaction will move the entire expense from the project currently charged and place the charge on the same project but different task or to a different project and task entirely. To create a Transfer cost transaction, select Costing and then click on **Transfer** to open the Transfer Expenditure Item screen.



2. Type the receiving project number in the **Project Number** field.
3. Select the **Task Number** from the drop-down menu.
4. If the receiving project is a non-sponsored project you are not required to complete the **Contract Number**, and the **Funding Source** fields.
5. Click the **Submit** button.

A screenshot of the 'Transfer Expenditure Item' form. The form title is 'Transfer Expenditure Item: 324683'. The form contains several fields and buttons. A hand icon points to the 'Submit' button. Annotations include: a green callout box pointing to the 'Project Number' field with the text 'Type the receiving project number here'; a green callout box pointing to the 'Task Number' dropdown menu with the text 'Select the appropriate task from the drop-down menu'; and a red callout box pointing to the 'Contract Number' and 'Funding Source' fields with the text 'The Contract Number and Funding Source fields are not required for non-sponsored projects'. The 'Project Name' is '280758-Biochem Micro Service Revenue Account', 'Task Name' is 'SUMMER SCHOOL', 'Quantity' is '800', 'Unit of Measure' is 'Dollars', 'Hold Invoice' is 'No', 'Hold Revenue' is 'No', 'Billable' is 'Yes', and 'Capitalizable' is 'No'. The 'Details' section shows 'Project Number' as '201140' and 'Task Number' as '204'. The 'Contract Number' and 'Funding Source' fields are empty.

6. Type the receiving project number in the **Project Number** field.

7. Select the **Task Number** from the drop-down menu.
8. If the receiving project is a **sponsored project** the **Contract Number**, and the **Funding Source** fields will populate automatically.
9. Click the **Submit** button.

Overview **Manage Project Costs** x

Transfer Expenditure Item: 324683

Project Name 200750-Biochem Micro Service Revenue Account  
 Task Name SUMMER SCHOOL  
 Contract Number  
 Funding Source

Quantity 800  
 Unit of Measure Dollars  
 Billable Yes  
 Capitalizable No

Hold Invoice No  
 Hold Revenue No

Submit Cancel

Details

\* Project Number 000100  
 \* Task Number 800  
 \* Contract Number 100095  
 \* Funding Source Association of Univ Pr

Type or search the receiving project number

Select the appropriate task from the drop-down menu

The Contract Number and Funding Source fields will automatically populate

10. A Justification screen will pop up. Enter the justification for the transfer. Click the **OK** button.

Submit Adjustment for Approval x

PJC-2220602 Your adjustment will be submitted for approval. Do you want to continue?

Justification

OK Cancel

11. This transaction has been sent to your Finance Approver for approval.