What we will cover:

- Overview of Flexible RouteIt
- Overview of the Budget Transfer RouteIt
- Hands On Practice
Overview of Flexible RouteIt

- RouteIt is a UWF system for electronically sending documents to one or more people for action.
- Online record of reviewers electronic signatures
- No predefined list of user roles—you create a new path with each document you prepare.

http://www.uwf.edu/helpdesk/support/routeit/flexible/index.cfm
To start a new route...

- Create the document to be routed and Select RouteIt
- Enter a unique name for your route—Use the BT document number
- Enter the name of all first person who should approve the route
- Upload other document(s) if you want them included
- Click Next.
- Enter comments as appropriate.
- Click Start Routing, the person you specified on the previous screen will be sent an email message with a link to the route.

http://www.uwf.edu/helpdesk/support/routeit/flexible/index.cfm
When you receive a route for review...

- Click the link in the RouteIt email.
- Review the attached document(s) and read any comments.
- If someone else needs to receive the route after you, enter the person's name as the **Next Recipient-for Budget Transfers**
  
  **Lourdes Stevens is the person they should be sent to.**

- Upload additional files and add comments as needed.
- Take the appropriate action:
  - **Approve**
  - **Deny**
  - **Complete**
- Email notification is sent to the route initiator when the route is completed or denied.

http://www.uwf.edu/helpdesk/support/routeit/flexible/index.cfm
Overview of the Budget Transfer RouteIt

- Cross Divisional budget transfers (BTs) only—this means you are moving budget out of your division.
- Non-Research and Sponsored Programs (RSP) funds only
- Review Index(es) to be used in the budget transfer
- Create document in Banner (FGAJVCQ)-go as far as you can then exit without completing
- Prepare Budget Transfer Form
- Complete the RouteIt Form
- You will be notified via email upon approval/denial
Cross Divisional budget transfers only

- There is at least one person for each division that has unlimited access to the departments within the division, however they are not allowed to transfer to or from another division. In this case a paper budget transfer is required. The paper budget transfer will be submitted using the Flexible Budget Transfer Route It.
Non-Research and Sponsored Programs (RSP) funds only

- Budget Transfer Route It is **not to be used for Research and Sponsored Programs** (RSP) budget transfers.
Review Index(es) that are to be used in the budget transfer

- **For Division**: verify that at least one index is outside your division.
- **For Budget**: Verify that you have budget in the index and account giving up budget of at least the amount of budget being given up.
Create document in Banner (FGAJ VCQ)

- Header Information – Enter the date and total amount of the document
- Long Text – Enter long text if appropriate (remember short text is limited to approx 30 characters)
- Line Items – Enter the lines for which you have banner security within your division.
- Make a note of the document number assigned by Banner
- Exit without completing the budget transfer
Prepare the Budget Transfer Form

- Go to MyUWF and search for Budget Transfer form
- Complete the appropriate fields on the form including the Banner assigned document number
- Select the Send to RouteIt button at the bottom of the form
Complete the Routelt Form

- Enter a unique name – for BTs the unique name is the Banner assigned document number
- Select who you are submitting the request for
  - Select the appropriate radio button
  - If you are submitting for someone else, once you select that radio button you will be prompted to select the person you are submitting for.
- Select the Next Recipients following the same approval levels as we have for documents prepared in Banner (Lourdes Stevens is the final recipient for BTs).
Complete the Route It Form Continued...

- Enter comments that would be helpful for the approver(s). We suggest that you might want to make a note for the next recipient(s) as to who needs to see the document and in what order. Note: If you put a check mark next to Make My Comments Private - then your approver(s) will not see the comments.
- Select one of the following:
  - Delete Request - if you determine that you do not need to complete the document. Remember to go back to FGAJ VCQ and change the amounts to zero, remove the long text, and email budgets@uwf.edu.
Complete the RouteIt Form Continued…

- **Start Routing** - sends the document to the next recipient for review. Remember to send an email to budgets@uwf.edu.
- **Save and Return to Route List** - If you are not ready to send for approval but will come back to this document later.
  - Send email to budgets@uwf.edu if you select Start Routing or Delete Request. In the email be sure to reference the document number.
  - You will be notified via email upon approval/denial.
Budget Transfer Route It

Hands On Training
Questions and Answers?

Contact Information

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