STEP 1

Select the Financials card.

STEP 2

Click Budget Requests for BE Card.
**STEP 3**

Select the appropriate POV options. Select the Activity that you send the funds from. You need to drill down to the activity.

**STEP 4**

Right click the blank space and select "Add Budget Request."
**STEP 5**

Enter Description such as "Fundswap for Student Stipend 19900 swap out."

**STEP 6**

Select the Request Type by drilling down on the tree.
**STEP 7**

Determine whether CBO approval is required and select the appropriate option.

**STEP 8**

Input the Funds that are going out (e.g. 199000).
**STEP 9**

Select the scenario, such as "temp" if it is one-time.

**STEP 10**

Click Launch.
STEP 11

Click Launch.

STEP 12

Right-click on your request row and click on Allocation Form.
**STEP 13**

Check your POV options.

**STEP 14**

Input the appropriate amount of funding you would like removed from the BC as a negative number in the appropriate row.
STEP 15

Click Save.

STEP 16

Choose to save the allocation as draft or submit to CFAO.
STEP 17
Click Launch.

STEP 18
Success message will appear. click OK.

STEP 19
Navigate back to the Create Budget Request tab at the bottom of the page.
Right click again and click Add Budget Request. Follow the same steps as before and click Launch.

Right click the request and click Allocation Form.
STEP 22

Add the information to your desired BC.

STEP 23

Click Save.
Your CFAO can now approve or decline your request. The fundswap is complete for non-CFAOs.