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BUDGETARY USER MANUAL

APPROVE AND RELEASE AN APPROPRIATION

APPROVE AN APPROPRIATION DOCUMENT

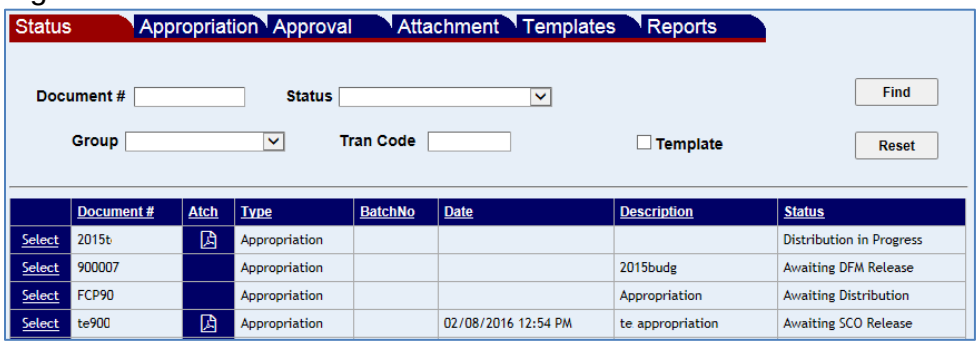
The appropriation documents can be approved by users who have been designated **Approvers**. Then then appropriation documents can be released by users who have been designated with **Release** authority. (If no Approvers have been designated, but **Release** users have, the documents can be released by them so that DFM can review and release the documents to SCO.)

For agencies 100, 101, 102, 104 and 110, the Budgetary application was modified to route appropriate batches from the Agency to SCO for approval and release without going through DFM Release. When appropriation transactions are entered and approved/released, e-mails notification of the related batch will be automatically generated to SCO. The batch will route to SCO for approval and processing into STARS.

1. On the **Status** screen, click **Select** next to the Appropriation document. (If you do not have appropriate permissions to approve a document, a message will be displayed stating so.)

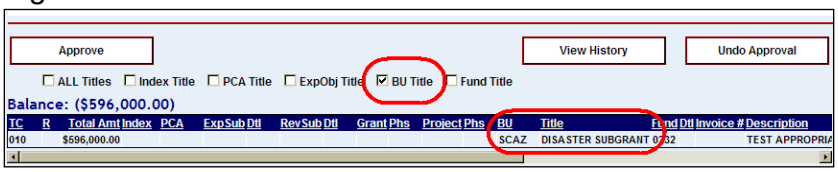
   On the **Status** screen, all group names will be available to search for, even if a group does not apply to that particular type of document. So, for example, you may search for an Allocation by a group name and not find any documents, because that group name applies only to Appropriation documents.

Figure 1 - Status screen



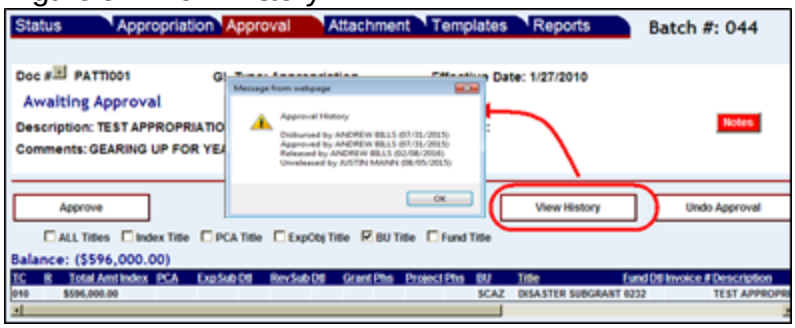
2. To display the title in the distribution grid, check a check box next to any fiscal code **Title** (e.g., **BU Title**).

Figure 2 - Fiscal Code Titles



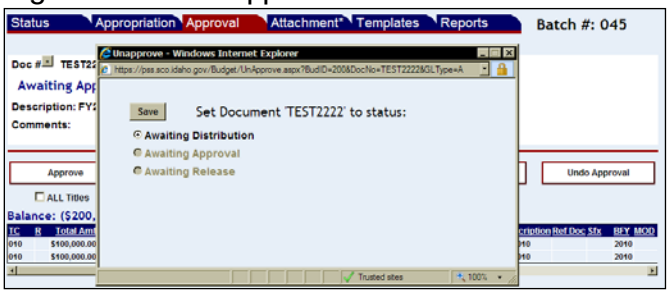
3. If necessary, click **View History** to display the names of people who have distribution/approval history with the document.

Figure 3 - View History



4. When satisfied, click **Approve**.
5. If the document needs to be corrected, click **Undo Approval**, select the status to return the document to (e.g., Awaiting Distribution), and then click **Save**.

Figure 4 - Undo Approval



RELEASE AN APPROPRIATION DOCUMENT

The appropriation documents can be released by users who have been designated with **Release** authority. (The screens are similar to the Approval steps – see above.)

1. On the **Status** screen, click **Select** next to the Appropriation document. (If you do not have appropriate permissions to release a document, a message will be displayed stating so.) On the Status screen, all group names will be available to search for, even if a group does not apply to that particular type of document. So,

for example, you may search for an Allocation by a group name and not find any documents, because that group name applies only to Appropriation documents.

2. To display the title in the distribution grid, check a check box next to a fiscal code **Title**, (e.g. **BU Title**).
3. If necessary, click **View History** to display the names of people who have distribution/approval history with the document.
4. When satisfied, click **Release**. When the document is released to DFM or SCO, it will be assigned a batch number. If the document is returned by DFM or SCO, the batch number will be deleted.
5. If the document needs to be corrected, click **Undo Approval**, select the status to return the document to (e.g., **Awaiting Distribution**), and then click **Save**.