

**Reminder: Budget Transfer Journal Workflow Launches August 3  
July 21, 2020**

*From the Budget & Financial Planning and the Office of Research Finance Operations*

UTSA continues efforts with Budget & Financial Planning, the Office of Research Finance Operations, Business Information Systems and UT Shared Information Services to implement automated workflow for budget transfer journals. The new process allows a budget transfer journal created in PeopleSoft to route through the designated workflow approval process and post to the appropriate budget ledger. This replaces current manual processes for creating and/or routing budget transfer journals and attached documentation.

**When will the automated workflow be available in PeopleSoft?**

The new budget transfer process will be available for department use beginning Monday, August 3. At that time, we will enable workflow for automation.

**What are the benefits?**

- Accurate generation of budget transfer journals, with the ability to track electronic approvals.
- Budget validation for cost center/project ID entries.
- Email notification to approvers when a budget transfer journal routes through the workflow process.
- Automated review and confirmation of allowable budget transfers with regard to funds, cost centers and projects.
- Improved efficiencies, resulting in a stronger review process and timely posting.

**Are training and user guides available?**

**Training webinars** are available for individuals who initiate or approve budget transfer journals. View and register for classes on [My Training](#).

<b>Class Number</b>	<b>Class Name</b>	<b>Date</b>	<b>Time</b>	<b>Location</b>
PS0327 **	Automated Budget Transfer Process	July 22, 2020	1:30–3:00 p.m.	Online
PS0327 **	Automated Budget Transfer Process	July 23, 2020	10:00 –11:30 a.m.	Online
PS0327 **	Automated Budget Transfer Process	July 28, 2020	2:00–3:30 p.m.	Online
PS0327 **	Automated Budget Transfer Process	July 29, 2020	3:00–4:30 p.m.	Online
<p><i>** PS0327 is a webinar. Participants must have sound capabilities on their computers and may need to install WebEx. Registrants will receive an email containing a link to join the WebEx meeting. During the session, participants will be able to view the training and ask questions.</i></p>				

A **budget transfer journal PowerPoint presentation** will be available on the [Budget Office – Training Materials](#) website by end of day on Tuesday, July 21.

The **budget transfer journal user guide** with step-by-step instructions will be available by the launch date.

Additional information will be communicated in preparation for the launch of the automated process on August 3