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.
**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.**

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.