Journal Mover: Use This Feature Instead of Doing a Journal Entry

Myth: If I want to reclass/move posted transactions to another department, there is no way to include the detailed description for the transaction.

Truth: Journal Mover allows you to reclass posted transactions and it will automatically include the detailed description with the reclass.

Job Aid: How Do I Use General Ledger Journal Mover?

Requesting SpeedTypes: New Features to Make it Simpler

Myth: Most ChartFields are NOT required when submitting a SpeedType request.

Truth: Changes have been made that now require the submitter to include ALL ChartFields when requesting a new SpeedType.

Job Aid: What's Left in My Budget?

Budget Overview: What's Left in My Budget?

Myth: There is no way to verify if the ChartField combination is correct when I submit a SpeedType request.

Truth: Changes have been made to require the system to perform non-account combo rules when submitting SpeedType request. Dept must be valid for OPU. Fund > 1999 requires project, Grant Fund SXXXX requires Grant project. This does not apply to Account Codes because Accounts are not part of SpeedType.

Myth: If my Speedchart request is denied, I’ll never know and I can’t make updates.

Truth: If a Speedchart/SpeedType request is denied, the originator will receive an email, can make changes to the request and then can re-submit back into workflow. Approvers are required to include comments before denying a request so that the originator will know what to update.

Myth: I never know if my Speedchart is approved.

Truth: The Originator receives e-mail upon final approval that the Speedchart/SpeedType has been added.

Journal Entry Approvals: Common Errors When Reviewing Journals for Approval

Myth: When reviewing the journal entry, there may be more than one page. The first page could be fully approved but the second page may not. The approval tab for the journal only displays the first page of approvers and if there are additional approvers you will have to use the arrows to get to the next page.

Truth: The General Ledger WorkCenter provides a one stop shop including a query that you can run to determine pending journals by submitter.

NEW Job Aid: How do I Use the General Ledger WorkCenter to Identify Pending Journals for Approval?