

# How to Process/Track a Budget Transfer Request using PeopleSoft (Non-Salary Accounts ONLY)

Author: Budget Department

Revised March 2019

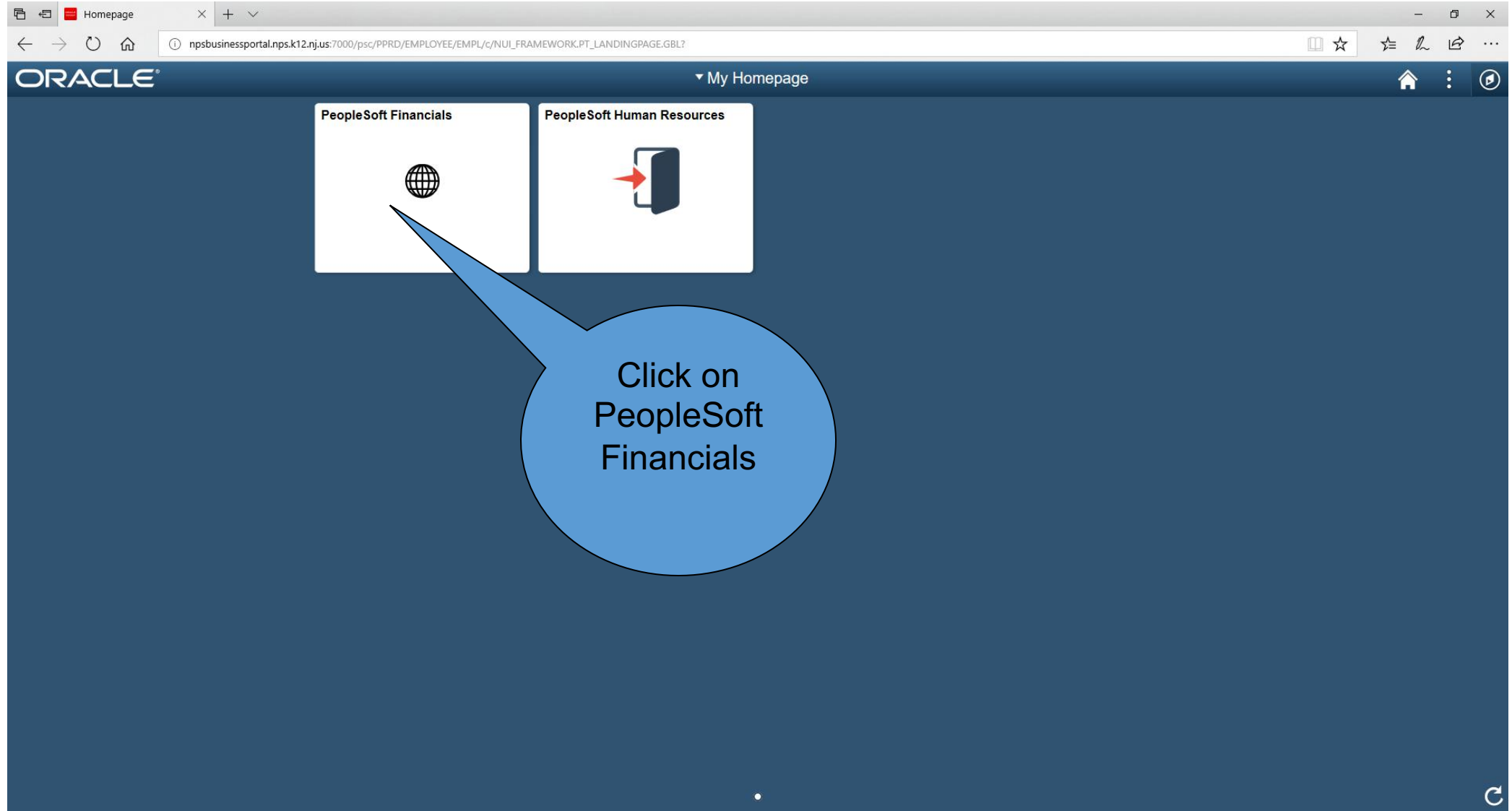
# Process Budget Transfer

The image shows a browser window with the Oracle PeopleSoft Sign In page. The browser's address bar contains the URL: `npsbusinessportal.nps.k12.nj.us:7000/psp/PPRD/EMPLOYEE/EMPL/?cmd=logout`. The page features the Oracle PeopleSoft logo at the top center. Below the logo is a login form with the following fields:

- User ID:** A text input field containing the value `psewak`.
- Password:** A password input field with masked characters (dots).
- Select a Language:** A dropdown menu currently set to `English`.

Below the form is a green **Sign In** button and a checkbox labeled **Enable Screen Reader Mode**. A large blue arrow points from the right side of the page towards the User ID and Password fields, containing the text: **Enter the User ID and Password to log in to PeopleSoft**. At the bottom of the page, there is a copyright notice: **Copyright © 2000, 2017, Oracle and/or its affiliates. All rights reserved.**

# Process Budget Transfer



# Process Budget Transfer

The image shows a screenshot of a web browser displaying the Oracle NPS business portal homepage. The browser's address bar shows the URL: `npsbusinessportal.nps.k12.nj.us:9000/psc/FPRD_1/EMPLOYEE/ERP/c/NUI_FRAMEWORK.PT_LANDINGPAGE.GBL?Page=PT_LANDINGPAGE`. The page header includes the Oracle logo and the text "My Homepage". The main content area features a grid of tiles:

- Create Requisition**: Represented by a shopping cart icon.
- Manage Requisitions**: Represented by a document icon with a star.
- NPS Account Analysis Report**: Represented by a document icon with a pie chart and a person silhouette.
- Worklist**: Represented by a document icon with a checkmark.
- Budget Transfer Request**: Represented by a double-headed arrow icon. A blue callout bubble points to this tile with the text "Click on Budget Transfer Request".
- Manage Requisition Approvals**: Represented by a document icon with a checkmark.
- Classic Home**: Represented by a computer monitor icon.

The bottom right corner of the page contains a refresh icon.





# Process Budget Transfer

Requestor: Patricia Sewak      Transfer Request #: 0000000      Journal ID:

Request Status:

\*Request Date: 03/20/2019

Budget Period: 2019

Hide Descriptions

Transfer Money From

Transfer From Information 1	Transfer From Information 2
*Transfer Amount	*Fund Code *Sub-Fund *Program *Function *Account *Location *Strategy *Network
1 -1000.00	

Transfer Money To

Transfer To Information 1	Transfer To Information 2
*Transfer Amount	*Fund Code *Sub-Fund *Program *Function *Account *Location *Strategy *Network
1	

Comments / Justification

Net Transfer Amount      \$0.00      Submit Request

Add      Update/Display

The "Transfer From Amount" should be entered as a negative number

# Process Budget Transfer

Homepage Budget Transfer Reques Budget Details

npsbusinessportal.nps.k12.nj.us:9000/psp/FPRD\_7/EMPLOYEE/ERP/c/NPS\_MENU.NPS\_BUD\_XFR\_CMP.GBL

Home Sign Out

ORACLE Add To Notification NavBar

Help Personalize Page

**Budget Transfer**

Requestor: Patricia Sewak Transfer Request #: 0000000 Journal ID:

Request Status:

\*Request Date: 03/20/2019

Budget Period: 2019

Hide Descriptions

Transfer Money From

*Transfer Amount	*Fund Code	*Sub-Fund	*Program	*Function	*Account	*Location	*Strategy	*Network	Description	Description	
1	-1000.00	15	15	190	100	610	049	000	402	Blended Resource Fund	Blended Resource Fund

Transfer Money To

*Transfer Amount	*Fund Code	*Sub-Fund	*Program	*Function	*Account	*Location	*Strategy	*Network	Description	Description	Description	
1	1000.00	15	15	190	100	640	049	000	402	Blended Resource Fund	Blended Resource Fund	Regular Prog - Undistributed

Comments / Justification

Net Transfer Amount \$0.00 **Submit Request**

Add Update/Display

Enter the correct account in the "Transfer From" and "Transfer To" sections



# Process Budget Transfer

The screenshot shows the Oracle Budget Transfer Request form. At the top, the browser address bar displays the URL: npsbusinessportal.nps.k12.nj.us:9000/psp/FPRD\_7/EMPLOYEE/ERP/c/NPS\_MENU.NPS\_BUD\_XFR\_CMP.GBL. The Oracle logo is visible in the top left, and navigation links like Home, Sign Out, Add To, Notification, and NavBar are in the top right. The form includes fields for Requestor (Patricia Sewak), Transfer Request # (0000000), and Journal ID. The Request Status is shown, along with a Request Date of 03/20/2019 and a Budget Period of 2019. There are sections for 'Transfer Money From' and 'Transfer Money To', each with a table of transfer details. A 'Comments / Justification' section contains the text: 'Transfer is required to fund textbook line in order to purchase Math and Science replacement books for the 5th and 6th grade. Supplies and materials requirements are met for the school year.' At the bottom, the Net Transfer Amount is \$0.00, and a 'Submit Request' button is present. Two callout boxes provide instructions: 'Step 1: Provide a detailed justification of what/why are you submitting this transfer.' pointing to the comments section, and 'Step 2: Click the Submit Request' pointing to the 'Submit Request' button.

**Step 1:**  
Provide a detailed justification of what/why are you submitting this transfer.

**Step 2:**  
Click the Submit Request

# Process Budget Transfer

Requestor: Patricia Sewak

Transfer Request #: 0000000 Journal ID:

Request Status:

\*Request Date: 03/20/2019

Budget Period: 2019

Transfer Money From

*Transfer Amount	*Fund Code	*Sub-Fund	*Program	*Function	*Account	*Location	*Strategy	*Network	Description	Description	Description	
1	-1000.00	15	15	190	100	610	049	000	402	Blended Resource Fund	Blended Resource Fund	Undistributed

Transfer Money To

*Transfer Amount	*Fund Code	*Sub-Fund	*Program	*Function	*Account	*Location	*Strategy	*Network	Description	Description	Description	
1	1000.00	15	15	190	100	640	049	000	402	Blended Resource Fund	Blended Resource Fund	Regular Prog - Undistributed

Comments / Justification

Transfer is required to fund textbook line in order to purchase Math and Science replacement books for the 5th and 6th grade. Supplies and materials requirements are met for the school year.

Net Transfer Amount \$0.00

The system will generate a Transfer Request ID# after it is submitted. This ID# will help you track the transfer as it goes through the approval process.

# **How to Track a Transfer After it Has Been Submitted Through PeopleSoft**



# Track Budget Transfer

Homepage Budget Transfer Reques

npsbusinessportal.nps.k12.nj.us:9000/psp/FPRD\_4/EMPLOYEE/ERP/c/NPS\_MENU.NPS\_BUD\_XFR\_CMP.GBL?PORTALPARAM\_PTCNAV=NPS\_BUD\_XFR\_CMP\_C

Favorites Main Menu NPS Budget Transfer Request Budget Transfer Request

ORACLE

### NPS Budget Transfer Request

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

Transfer Request Number begins with

Request Status =

Budget Period begins with

From Department begins with

To Department begins with

Next Approver begins with

Case Sensitive

Search Clear Basic Search Save Search Criteria

Find an Existing Value | Add a New Value

Enter the  
Transfer  
Request ID#  
and click  
Search

# Track Budget Transfer

The screenshot shows an Oracle web application interface for tracking budget transfers. The page includes a header with the Oracle logo and navigation links, and a main content area with various data fields and tables. A blue callout bubble is overlaid on the page, containing three numbered points:

1. Shows the original Requestor.
2. Identifies the Next Approver
3. Denotes when the transfer was last updated

The page content includes the following information:

**Budget Transfer**

Requestor: Dr. Wanda Long-Brooks      Transfer Request #: 0005380      Journal ID:

Request Status: Pending Approval      Next Approver: Mario Santos

Request Date: 03/19/19      Last Update: 03/19/19 5:33:42PM

Budget Period: 2019      Resubmitted On:      Prev. Approver: Angela Nicole Mincey

**Transfer Money From**

*Transfer Amount	*Fund Code	*Sub-Fund	*Account	Description
1	-800.00	15	000	Blended Resource Fund

**Transfer Money To**

*Transfer Amount	*Fund Code	*Sub-Fund	*Program	*Function	Description
1	800.00	15	000	221	Undistributed

**Comments / Justification**  
Per Marixsa Needed to Cover Teacher Travel -0000170060

**Net Transfer Amount**      \$0.00

**Approval / Denial Comments**

Buttons at the bottom: Return to Search, Add, Update/Display

# Track Budget Transfer

The screenshot shows a web browser window displaying an Oracle budget transfer request. The browser's address bar shows the URL: `npsbusinessportal.nps.k12.nj.us:9000/psp/FPRD_7/EMPLOYEE/ERP/c/NPS_MENU.NPS_BUD_XFR_CMP.GBL?isFolder=false`. The page title is "Budget Transfer Request". The Oracle logo is visible in the top left corner, and navigation links like "Home" and "Sign Out" are in the top right. The main content area shows details for a budget transfer request:

- Requestor: Tonia Pritchett
- Transfer Request #: 0005137
- Journal ID: XFR0049702 (highlighted with a red circle)
- Request Status: Approved
- Request Date: 12/05/2018
- Budget Period: 2019
- Next Approver:
- Last Update: 12/20/18 6:22:24PM
- Resubmitted On:
- Prev. Approver:

Below these details are sections for "Transfer Money From" and "Transfer Money To", each containing a table with columns for Transfer Amount, Fund Code, Sub-Fund, Program, Function, Account, Location, Network, and Description. The "Transfer Money From" table shows a transfer of -2500.00 from Fund Code 15, Sub-Fund 15, Program 402, Function 100, Account 600, Location 028, Network 403, and Description "Blended Resource Fund". The "Transfer Money To" table shows a transfer of 2500.00 to Fund Code 15, Sub-Fund 15, Program 402, Function 100, Account 600, Location 028, Network 403, and Description "Blended Resource Fund".

A blue callout bubble points to the "Journal ID" field with the following text:

The system will generate a Journal ID# when the transfer is approved by all parties and the accounts should be updated.

At the bottom of the page, there are buttons for "Return to Search", "Add", and "Update/Display".