Training Guide for:
Transfers Review Report

Who should use this guide:
Departmental and/or College financial planners involved in the planning and review of transfers within or outside their College/Division.

Purpose:
The report allows users to view and track confirmed and unconfirmed planned transfers entered in their plan file(s).

Locating the report:
Arizona.axiom.cloud
Navigating the report:

Use the filter icon to retrieve information by Budget Year, View, Status (required field), and Org

- Filter by View
  - Default - Displays Transfer ID, description, In & Out detail by Fund, Organization, Budget Object, and the planned amounts for current and future years
  - Transfer Details - In addition to items displayed in the Default view, it will also display available comments.
Filter by Status
- Confirmed - displays only transfers confirmed by all parties involved in the transfer (amounts match in the To and From side of the transfer).
- Unconfirmed - displays transfers awaiting confirmation from one of the parties (amounts do not match in the To and From side of the transfer).
- All - displays both confirmed and unconfirmed transfers

Select Organization - Select a single or multiple organization codes

Your selections will be displayed at the top of the report. The report also offers the ‘Export to Excel’ function, located on the top-right corner:
Understanding your data:

The information displayed in the report will mirror the format and data in the “Transfers” tab of the Operating Budgets module.

- The transfer ID is a unique identifier for each transfer entered in the system, and grouped in two consecutive rows to display the From (Out) and To (In) side of the transfers.
- Each row will display the Planning Fund and Org affected by the transfer.
- As a reminder, the transfer data for your org is automatically included in the “Budget” tab of the Operating Budget module, whether the transfer is confirmed or unconfirmed.

It is good practice to periodically review the unconfirmed transfers and reach out to the affected Organizations to coordinate and finalize planned transfers.

For additional questions, please contact your assigned Budget Analyst.