

# Budget Request System

Purchasing Review and Comments

# Budget Request System Purchasing Review and Comments

- Agenda
  - Budget Request System overview
  - Budget request form – FWABREQ
    - Purchasing Review Required box
  - Purchasing review
    - SSRS reports
    - Banner form – FWABRPU
  - Recording Purchasing comment
    - Banner form – FWABRPU
  - Review

# Budget Request System Overview

- UNCW's budget request process is available through Banner forms created to automate and standardize the budget process
- Budget requests requiring Purchasing review can be entered during the following budget cycles:
  - AA Annual Allocation (March – June)
  - BE Biennial Expansion (July – August)
  - CITI Campus Initiated Tuition Increase (July – Dec)
  - FF Student Fees (Sept– Dec)
  - MY Mid-Year Adjustment (Jan– March)
  - SB Supplemental Budget (Nov – Jan)

# Budget Request System Overview

- Purchasing reviews all budget requests that meet the following criteria
  - Items that cost more than the capitalization threshold
  - Consulting services
  - Purchases requiring lead time

# Budget Request System

## Budget Request Form - FWABREQ

- Users check the **Purchasing Review Required** box for items that will require the Purchasing Office review

Budget Request Form FWABREQ 7.0 (PPRD)

Budget Request ID: AA08001 Library/Student equipment support

Header Record | **Line Item Request** | Header Priority | Collaborative Unit

Line Item Detail | Line Item Priorities

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### Line Item Detail

Line Ref No: 001

Desc: Laptop computers for students to borrow

Fund: 151100 University Libraries

Organization: 30800 Randall Library

Program: 151 Libraries

Current Year PERM Amt: 11,000 Year 4 PERM Amt:

Next Year PERM Amt: Year 5 PERM Amt:

Year 3 PERM Amt:

Review Required: Facility:  Purchasing:

HR

# Budget Requests Purchasing Review

- To review a report of budget requests
  - Access the UNCW SSRS report portal on the web
    - <https://uncwreports/reports/>
  - Select Budget Request System folder
  - Select the Budget Requests Needing Purchasing Review report
  - Select the Budget Year and Budget Cycle provided in the guidance from the Budget Office

# Budget Requests Purchasing Review

- Displays budget requests that have the Purchasing Review Required box selected on FWABREQ
  - Filters
    - Budget Year
    - Budget Cycle
    - Division
    - Department

The screenshot shows a web application interface for budget requests. At the top, there is a navigation bar with links for "Home", "Budget Request System", and "Subscriptions". The main title is "Budget Requests Needing Purchasing Review". Below the title, there are tabs for "View", "Properties", "History", and "Subscriptions". A search bar is located on the right side of the page. The main content area contains a form with several dropdown menus and a "View Report" button. The form fields are: Budget Cycle (Annual Allocation, Campus Initi), Department (AVC Infrastructure, AVC Techn), Division (Academic Affairs, Business Affa), and Year (2010).

SQL Server Reporting Services  
Home > Budget Request System >  
**Budget Requests Needing Purchasing Review**

Search for:  Go

View Properties History Subscriptions

New Subscription

Budget Cycle: Annual Allocation, Campus Initi  
Department: AVC Infrastructure, AVC Techn  
Division: Academic Affairs, Business Affa  
Year: 2010

View Report



# Budget Requests Purchasing Review

- To display all budget requests in Banner
  - Access the Budget Request Purchasing Recommendation Form – FWABRFA
  - Select the Budget Year and Budget Cycle provided in the guidance from the Budget Office
  - Select All Divisions from the Division Code dropdown box, next block

# Budget Request System

## Purchasing Approval Form - FWABRPU

- Displays budget requests that have the Purchasing Review Required box selected on FWABREQ
  - **Filters**
    - Budget Year
    - Budget Cycle
    - Division
    - Budget Request ID (optional)

Budget Request Purchasing Recommendation Form FWABRPU 7.0 (PPRD)

<b>Budget Year:</b>	<input type="text" value="2010"/>	<b>Budget Cycle:</b>	<input type="text" value="CITI"/>	Campus Initiated Tuition In:
<b>Division Code:</b>	<input type="text" value="ALL"/>	All Divisions	<b>Budget Request ID:</b>	<input type="text" value="AA08001"/>

Header Record   Line Item Request

# Budget Request System Purchasing Approval Form - FWABRPU

- Header record
  - Select filters, next block

Budget Request Purchasing Recommendation Form FWABRPU 7.0 (PPRD)

**Budget Year:** 
**Budget Cycle:** 
 Campus Initiated Tuition In:

**Division Code:**  All Divisions
 **Budget Request ID:**

Header Record
  Line Item Request

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**Budget Request Header Information**

Budget Req Id	Title	Total Current		Total Next Year		Final Decision
		Permanent Amount	OneTime Amount	Perm Amount	OneTime Amount	
AA08001	Library/Student equipment support Randall Library	15,000	0	0	0	<input type="text"/>
AA08003	Student Education Support School of Nursing	0	20,686	0	0	<input type="text"/>

# Budget Request System Purchasing Approval Form - FWABRPU

- Line item request
  - Scroll down to the line item to review
  - Select the Line Item Request tab

Budget Request Purchasing Recommendation Form FWABRPU 7.0 (PPRD)

**Budget Year:**  **Budget Cycle:**  Campus Initiated Tuition In:  
**Division Code:**  All Divisions **Budget Request ID:**

Header Record  Line Item Request

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**Budget Request Header Information**

Budget Req Id	Title		Final Decision	
AA08001	Library/Student equipment support	Randall Library		
	<b>Total Current Permanent Amount</b>	<b>Total Current year OneTime Amount</b>	<b>Total Next Year Perm Amount</b>	<b>Total Next Year OneTime Amount</b>
	15,000	0	0	0

# Budget Request System Purchasing Approval Form - FWABRPU

- Line item request
  - Check the Purchasing Reviewed box
  - Enter comment in Purchasing Comments box

Budget Request Purchasing Recommendation Form - FWABRPU 7.0 (PPRD)

**Budget Year:** 2010    **Budget Cycle:** AA    Annual Allocation  
**Division Code:** ALL    All Divisions    **Budget Request ID:** AA09024

Header Record    **Line Item Request**

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**Line Item Information**

<b>Line Ref No:</b> 012	<b>Final Decision:</b>	
<b>Desc:</b> Public Service Contracts (CHHS)	<b>FTE:</b>	
<b>Fund:</b> 137101    Vcaa 101 Operations	<b>EPA/SPA Position Title:</b>	
<b>Organization:</b> 30011    Academic Affairs Admin	<b>Account:</b> 921000    Contracted Svc Budget Pool	
<b>Program:</b> 101    Instruction	<b>Activity:</b>	
	<b>Category Code:</b> SERC    Services - Contracted	

<b>Current Year PERM Amt:</b>	<b>Year 4 PERM Amt:</b>	<b>Current Year ONE-TIME Amt:</b>	<b>Year 4 ONE-TIME Amt:</b>
<b>Next Year PERM Amt:</b>	<b>Year 5 PERM Amt:</b>	<b>Next year ONE-TIME Amt:</b>	<b>Year 5 ONE-TIME Amt:</b>
<b>Year 3 PERM Amt:</b> 0		<b>Year 3 ONE-TIME Amt:</b>	

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**Review Required:**    **Facility:**     **Purchasing:**


**HR Reviewed:**  \_\_\_\_\_

**Facility Reviewed:**  \_\_\_\_\_

**Purchasing Reviewed:**  MCGOWAND

**HR Comments:** \_\_\_\_\_

**Facilities Comments:** \_\_\_\_\_

**Purchasing Comments:**  Goods and Services contracts require Director of Purchasing's prior to commitment.

Budget Year: 2010 Budget Cycle: AA Annual Allocation

Division Code: ALL All Divisions

Budget Request ID: AA09024

Header Record Line Item Request

Line Item Information

Line Ref No: 012

Final Decision:

Desc: Public Service Contracts (CHHS)

FTE:

EPA/SPA Position Title:

Fund: 137101 Vcaa 101 Operations

Account: 921000 Contracted Svc Budget Pool

Organization: 30011 Academic Affairs Admin

Activity:

Program: 101 Instruction

Category Code: SERC Services - Contracted

Current Year PERM Amt:

Year 4 PERM Amt:

Current Year ONE-TIME Amt:

Year 4 ONE-TIME Amt:

Next Year PERM Amt:

Year 5 PERM Amt:

Next year ONE-TIME Amt:

Year 5 ONE-TIME Amt:

Year 3 PERM Amt: 0

Year 3 ONE-TIME Amt:

Review Required: Facility:  Purchasing:

HR Comments:

HR Reviewed:

Facilities Comments:

Facility Reviewed:

Purchasing Reviewed:  MCGOWAND

Purchasing Comments: Goods and Services contracts require Director of Purchasing's prior to commitment.

Activity Date: 17-AUG-2009

Budget Office Comments:

User Id: SOVAA

# Budget Request System

## Purchasing Review and Comments

- Review
  - Budget request form – FWABREQ
    - Purchasing Review Required box
  - Purchasing review
    - SSRS reports
    - Banner form – FWABRPU
  - Recording Purchasing comment
    - Banner form - FWABRPU



# Questions?

Need assistance?

Call the Budget Office

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