



Budget Office Approval Process

February 2008



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Budget Office Approval Process Overview

The Budget Request Approval forms are used for the processes listed below:

- Biennial Budgets
 - Continuation Budget (August-October)
 - Expansion Budget (July-August)
 - Capital budget (July-August)

- Supplemental Budget - 2nd Year of Biennial Cycle (November-January)
- Enrollment Growth (August-September)
- Campus-Initiated Tuition Increases (CITI) (July-December)
- Student Fee Funding (September-December)
- Special Funds (September-December)
- Annual Allocations (March-June)
- Mid-Year Review (January-March)



Budget Office Approval Process Overview Cont.

- Once the Budget Requests have been entered into Banner by the Departments/Divisions they are ready to be reviewed by the Budget Office.
- The Budget Office completes an initial review and analysis of the requests. Upon completion the requests are moved forward, per Budget Process Guidance, to the next appropriate level (i.e., Provost, CFO, Cabinet, Chancellor) for review, assessment, approval and allocation
- Once the Budget Cycle allocations have been determined the Budget Office enters the allocation decisions and dollar amounts into the Budget Office Approval forms
- There are two forms which can be used to enter this information:
 - FWABADM can be used for Header updates of the Final Decision and Action Code, and Line Item updates of the Final Decision, Action Code and Allotment amount
 - FWABADL can be used only for Line Item updates of the Final Decision, Action Code and Allotment amount




Budget Administrators Form - Header Record

The query selection boxes at the top of the screen (i.e., Budget Year, Budget Cycle, Budget Request ID, Final Decision, Line Number) allow you query for a specific request or for multiple requests

1. Enter a Budget Year (i.e., 2008), or leave blank to view multiple years
2. Tab to Budget Cycle and select a budget cycle from the drop down box. This is a mandatory field
3. If you wish to review a specific budget request, select the Budget Request ID number for that request from the drop down box. If you wish to view the entire listing of budget requests tab past Budget Request ID to Level
4. Choose the Level of "BO" from the drop down list. This is a mandatory field



Budget Administrators Form Header Record (cont)

5. If you wish to view budget requests with a particular final decision choose that decision from the drop down box for Final Decision
6. If you are querying for a specific Budget Request and wish to view a particular line number for that request enter the line number in the Line Number box (i.e., 007)
7. Hit Next Block  to see the results of your query.

If you queried for more multiple requests you can arrow up/down to get to the request you wish to view or enter information for. On the Header Record screen you can enter a Final Decision, a Priority No. and an Action Code. Note that the dollar amounts you see on this screen are the requested dollar amounts. The allocated dollar amounts are entered and viewed on the Line Item Request screen.




Budget Administrators Form Header Record (cont)

8. Click on Final Decision and choose a final decision from the drop down list

9. You can enter a Priority No. here or leave this box blank and tab to the next field. Typically the priority number is determined and assigned by the departments/divisions when they first enter the budget request

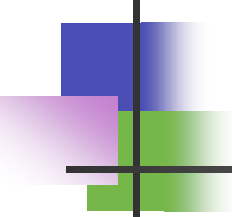
10. Click on Action Code and enter a code of action for the Budget Request

11. Hit Save  and then click on the Line Item Request tab



Budget Administrators Form - Line Item Request Tab

1. Choose the Line Desc you wish to review or enter allocation results for.
2. Click on Final Decision and choose a final decision from the drop down list
3. Enter a Priority Code which will be based on the Final Decision.
4. Click on Action Code and enter a code of action for the Budget Request
5. Click on Alloc Fund Code and choose the Banner fund number from the drop down box




Budget Administrators Form - Line Item Request Tab (cont)

6. Click on Alloc Acct Code and choose the Banner account code from the drop down box

7. Click on the appropriate dollar amount box and enter the dollar amount(s) as allocated by the Cabinet, VC's, etc.

8. The Budget Office Comment box is for the Budget Office Director's comments.

9. Repeat Script until you have completed all of your Header and Line Item entries. Then hit Save  and exit form



Budget Administrators Line Item Form

The query selection boxes at the top of the screen (i.e. Budget Cycle, etc.) allow you the ability to query for a specific line item or for multiple line items

1. Enter a Budget Year (i.e., 2008), or leave blank to view multiple years
2. Tab to Budget Cycle and select a budget cycle. This is a mandatory field
3. To view a specific budget request, select the Budget Request ID number from the drop down box. To view all Requests tab past this field to Level




Budget Administrators Line Item Form (cont)

4. Choose a Level of "BO". This is a mandatory field

5. Click on Final Decision to view line items with a particular final decision or leave blank to view all

6. Enter a number in the Line Number box to query for a specific request line no. (i.e., 007) or leave blank to view all

7. Hit Next Block  to see the results of your query.

8. Choose the Line Desc you wish to review or enter allocation results for.



Budget Administrators Line Item Form (cont)

9. Click on Final Decision and choose a final decision from the drop down list

10. You can enter a Priority Code or leave this field blank. Typically the priority codes are determined by the departments/divisions upon initial entry of the budget request

11. Click on Action Code and enter a code of action for the Budget Request

12. Click on Alloc Fund Code and choose the Banner fund number from the drop down box




Budget Administrators Line Item Form (cont)

13. Click on Alloc Acct Code and choose the Banner account code from the drop down box

14. Click on the appropriate dollar amount box and enter the dollar amount(s) as allocated by the Cabinet, VC's, etc.

15. The Budget Office Comment box is for the Budget Office Director's comments.

16. Hit Save  after you have completed all of your line item updates and exit form



Questions....