

A photograph of the Toronto skyline at dusk, featuring the CN Tower and several skyscrapers with their lights on, reflected in the water. The sky is a mix of blue and orange.

Budget Request Collaboration Process

December 2007

Budget Request Collaboration Process Table of Contents

- Budget Request Process Overview
- Budget Request Collaboration Entry
 - Header Record
 - Line Item Request
 - Line Item Detail
 - Line Item Priorities
 - Line Item University Goals & Objectives
 - Line Item Divisional Goals & Objectives

Budget Request Process Overview

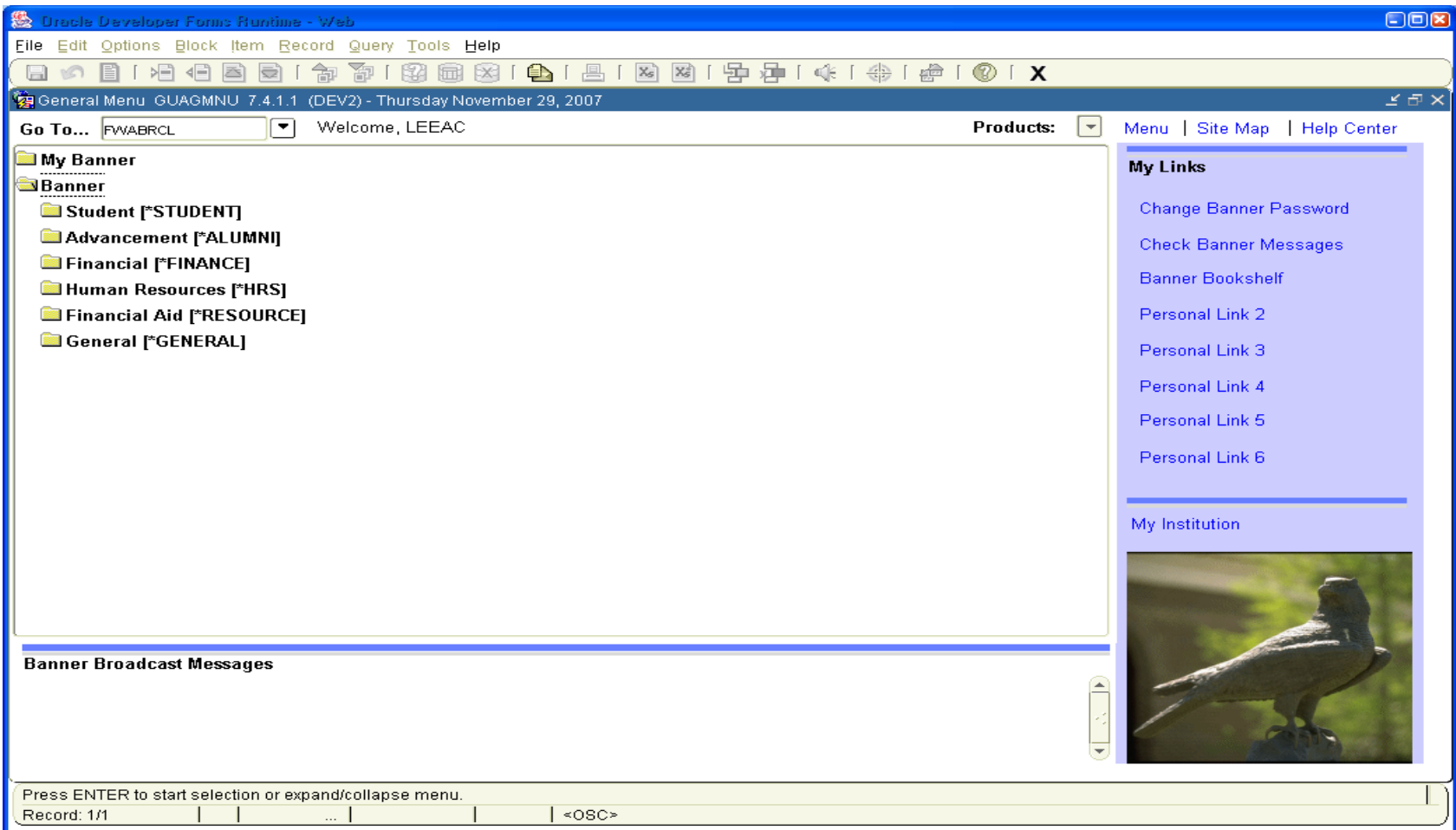
The Budget Request submission process has been automated and is accessible through Banner. Forms have been created in Banner to standardize the request entry format and create a uniform flow for the budgetary request submission process. The new system will be used for the budget processes, as ordered, 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)

Once the budget requests are in Banner, just as before, they are reviewed and evaluated by the Budget Office. They are then ready to be moved forward per budget process guidance to the next appropriate level (i.e., Provost, CFO, Cabinet, Chancellor) for review, assessment and approval.

Budget Request Collaboration

Log into Banner. To navigate to the Budget Request form type **FWABRCL** in the Go To box and hit “Enter”.



The screenshot displays the Banner web application interface. At the top, the title bar reads "Oracle Developer Forms Runtime - Web". Below it is a menu bar with "File", "Edit", "Options", "Block", "Item", "Record", "Query", "Tools", and "Help". The main header area includes a "Go To..." search box containing "FWABRCL", a "Welcome, LEEAC" message, and a "Products:" dropdown menu. A navigation menu on the left lists "My Banner" and "Banner" with sub-items: "Student [*STUDENT]", "Advancement [*ALUMNI]", "Financial [*FINANCE]", "Human Resources [*HRS]", "Financial Aid [*RESOURCE]", and "General [*GENERAL]". On the right, there is a "My Links" section with links for "Change Banner Password", "Check Banner Messages", "Banner Bookshelf", and six "Personal Link" items. Below the links is a "My Institution" section featuring a photograph of a bird perched on a stone. At the bottom, a status bar indicates "Record: 1/1" and "<OSC>".

Budget Request Collaboration Form - Header Record

Budget Year: **Division Code:**

Header Record | **Line Item Request**

Budget Collaboration Information


Budget Id	Title	En Reque	Collaboration Approved	Collaboration Approval Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

Enter the 4 digit budget year of the request

Record: 1/1 | ... | <OSC>

- Enter the Budget Year as provided in the Guidance for the budget process
- Enter the Division Code (i.e., AA, BA, etc.) for the division you wish to add your collaborating item to or choose all to see all Divisions requests.

FWABRCL Header Record

- Click on Budget Year and enter the year (i.e., 2008)
- Tab to Division Code and enter the division code (may use drop down box)
- Hit **Next Block**  or Ctrl Page Down to get to the Header Records
- Arrow between the requests until you find the request you wish to add a collaborating item to
- Click on **Line Item Request** tab



IMPORTANT NOTE

At this point in entering your collaborating item, you are entering into an existing Budget Request at the Line Item Request tab, Line Item Detail screen. The entry process from this point forward will be the same as when you originally enter budget request line items.

Line Item Request - Line Item Detail

1. In the Desc field enter a brief, but clear, description of the item you are requesting (maximum of 100 characters)
2. Tab to Fund, enter the fund number (may use drop down box)
3. The Organization & Program will automatically default based on the Fund choice
4. Final Decision (view only from this screen)
5. At FTE enter the percentage of FTE, if applicable (i.e., 1.0, .75, .40, etc.)
6. Tab to EPA/SPA Position Title and enter the EPA/SPA Position number and title as it appears in Banner, if applicable. For existing positions also enter the Banner position number (i.e., SPA Admin Asst II, Salary Grade 60, #7456)
7. Tab to Band and enter the banded classification (may use drop down box)
8. Tab to Account, enter the account number (may use drop down box)

Line Item Request - Line Item Detail (cont)

10. In Activity, enter the activity code if applicable, or tab to next field (may use drop down box)
11. In Category Code, enter the category code (may use drop down box)
12. Tab to appropriate Amount block(s) and enter the dollar amount(s) for request. NOTE: Do not include symbols (\$), or commas (,), decimals (.) or cents.
13. Tab to Approvals Required and check box (√) for *Facility* and/or *Purchasing* if approval is required by either, or both, of these areas. Facilities would normally be checked (√) for renovations or renovation related charges (i.e., new air conditioning system). Purchasing is a bit different in that when you check the purchasing box can be somewhat would normally be checked for any items with a cost of \$5000 or above, consulting services, capital threshold, and perhaps during.
14. Use Arrow down key on keyboard or hit Next Record  to enter additional items
15. Repeat Script until all entries are entered. Then hit Save  and go to the Line Item Priorities tab

HR Approved, Facility Approved, Purchasing Approved, HR Approval Comment, Fac Approval Comment, Purchasing Aprv Comment and Budget Office Comment are view only from this screen. The *Activity Date* and *User ID* automatically default when the document is saved

Click on the **Line Item Priorities** tab to enter priorities for specific line items. This screen is where you assign a Priority Code and an Action Code for each line item. Once you have assigned these codes to the line items they are ready to be processed/approved at the next level within your division.

Budget Request ID: AA08004 abcdefg

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

Line Item Detail **Line Item Priorities** Line Item University Goals/Object






Line Item Priorities

Line Ref #	Line Desc	Level Code	Priority Code
001	aceg	PROV	Provost
001	aceg	BO	Budget Office
001	aceg	VC	Vice Chancellor
002	bdfh	PROV	Provost
002	bdfh	BO	Budget Office

Choices in list: 2
Record: 1/6 ... List of Valu... <OSC>

- At your appropriate **Level Code** choose the **Line Ref #** you want to assign priority and action codes to.
- Choose a **Priority Code** from the list. The list consists of three codes and three levels for each code. **New** for things which have not been previously requested; **Prior Year** for anything which has been requested in a prior year or budget process; and **Unavoidable** for anything you feel you need funding for which is simply unpreventable. Then there are three levels to choose from for each priority code, High, Medium and Low
- Then choose an **Action Code** from the drop down list. All new requests should have an action code of Forward Request.

Line Item Priorities

1. Click  for Line Ref #. Highlight line item you wish to assign a Priority Code for and hit OK button
2. Go to Level Code and enter the appropriate code (may use drop down box )
3. Go to Priority Code and enter the appropriate code. There are three priority codes to choose between. *New* for things which have not been previously requested; *Prior Year* for anything which has been requested in a prior year or budget process; and *Unavoidable* for anything you feel you need funding for which is simply unpreventable. Then there are three levels to choose from for each priority code, High, Medium and Low. (may use drop down box )
4. Go to Action Code and enter the appropriate code. All new requests should have an action code of Forward Request. *Note: the Cabinet Allocated code is for Budget Office use only* (may use drop down box )
5. The *Activity Date* and *User ID* automatically default when the document is saved
6. Repeat Script until Priorities have been assigned for all line items
7. Hit Save  and go to the Line Item University Goals/Objective tab

Go to Line Item University Goals/Objectives tab to enter the University goals and objectives the line items will help to achieve. At this screen you enter the Strategic Goal(s) your request is tied to. As a rule each item should be tied to at least one of the University's Strategic Goals

Oracle Developer Forms Runtime - Web: Open > FWABREQ

File Edit Options Block Item Record Query Tools Help

Budget Request Form FWABREQ 7.0 (DEV2)

Budget Request ID: CH08001

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

Line Item Detail | Line Item Priorities | **Line Item University Goals/O**

Line Item University Strategic Goals and Objectives



Line Ref #	Line Desc	Strategic Goal	Objective
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

FRM-40350: Query caused no records to be retrieved.


Record: 1/1 | ... | List of Valu... | <OSC>

- Select the Line Reference # for the item you wish to assign a goal/objective for
- Choose a University Strategic Goal from the drop down box. You may have more than one for each item
- Choose a University Objective from the drop down box. Note: for each Strategic Goal there should be at least one objective to tie to it

Line Item University Goals & Objectives

1. Click on Line Ref # and choose the item you want to assign a University Strategic Goal for. Click the OK button.
2. Click on Strategic Goal and choose appropriate strategic goal (may use drop down box )
3. Click on Objective and choose the appropriate objective
4. The *Activity Date* and *User ID* automatically default when the document is saved
5. Use Arrow down key on keyboard or hit Next Record  to enter additional items
6. Repeat Script until University Strategic Goals and Objectives have been entered for all items


Note: Line items may have more than one Strategic Goal and Objective

7. Hit Save  and go to the Line Item Divisional Goals/Objectives tab
8. Click Line Item Divisional Goals/Objectives tab to enter divisional goals/objectives for the line items

Line Item Divisional Goals & Objectives

1. Click on Line Ref # and choose the item you want to assign a Divisional Goal and/or Objective for. Click the OK button.
2. Click on Strategic Goal and choose the appropriate strategic goal (may use drop down box ▼)
3. Click on Objective and choose the appropriate goal objective. Note: if there is not an objective tied to the Divisional Strategic goal choose “NA” for not applicable (may use drop down box ▼)
4. The *Activity Date* and *User ID* automatically default when the document is saved
5. Arrow down to add records
6. Repeat Script until Divisional Strategic Goals and Objectives have been entered for all items

Note: Individual line items may have more than one Divisional Strategic Goal and Objective

7. Hit the Save  and Exit or click on the Header Record tab to return to the list of collaborating budget requests.



Questions...