




*Budget Request  
Prioritization & Review*

*January/February 2008*



## Budget Request – Prioritization & Review Agenda

- Budget Request Process Overview
- Prioritize and Review your Budget Requests
- FWABREQ Form
  - Header Priority
  - Line Item Priorities
- FWABRPR Form
  - Header Record
  - Line Item Request

## Budget Request Process Overview

The Budget Request submission process has been automated and is accessible through Banner. Budget Request forms have been created in Banner which standardize the request entry format and create a uniform flow for the budgetary request and submission process. The new budget request forms will be used for the processes listed below:

- Biennial Budgets
  - Continuation Budget (August-October)
  - Expansion Budget (July-August)
  - Capital budget (July-August)
- Supplemental Budget - 2<sup>nd</sup> 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)

The process begins with the requests being data entered, prioritized & reviewed within the Division. Then the Budget Office reviews and analyzes the requests based on the Budget Process Guidance. The requests are then summarized and moved forward to the next appropriate level (i.e., Provost, CFO, Cabinet, Chancellor) for review, assessment and approval.

## Prioritize and Review Your Budget Requests

- Once a Budget Request has been entered into Banner it is available for review and prioritization by all levels within the Division as needed. This includes assigning Priority Codes and Action Codes for the overall Budget Request and the individual Line Items associated with that Budget Request.
- There are two forms which may be used for this process.

FWABREQ – This is the same form used to initially enter a Budget Request into Banner. The person who initially data enters the budget request will generally establish a priority number, priority code and action code, thus starting the process. Other levels may then review and prioritize the budget requests from within this form, but the FWABRPR form, which is made specifically for reviewing and prioritizing, is the preferred form for those who wish only to prioritize and review the requests.

FWABRPR - This form was specifically designed for the review and prioritizing part of the budget process. All levels, other than the person who initially enters the budget request into Banner, are encouraged to use this form as they review, assign priority and action codes to the requests.

On the **FWABREQ** form the Header Priority tab is where you can assign a Priority Number and an Action Code for the Budget Request. Once you have assigned a priority number and an action code the Budget Request is ready to be reviewed at the next level within your Division

**Budget Request ID:** CH08001


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

**Budget Level Priority**

Level Code	Priority Number	Action Code	Ready For	Activity Date	User Id
PROV					
Provost					

Level of user entering the priority  
Record: 1/1 | ... | List of Valu... | <OSC>

## FWABREQ - Header Priority

1. If your cursor is not on your appropriate Level Code when you first enter this form, arrow down to the correct level code, or if the code is not listed, arrow down to a blank a record, click on Level Code and choose the appropriate code (may use drop down box )
2. Tab, or place cursor in, Priority Number box and assign a priority number for the request. This number should be reflective of where this request falls priority wise in the list of items you are requesting funding for (i.e., 1, 3, 10, etc.). You may have more than one request with the same priority number (i.e., two requests both with a priority of 1)
3. Tab to Action Code and enter an action code of Forward, Hold or Deny Request (may use drop down box )
4. Check (v) Ready for Review box
5. Hit Save  and Exit

On the Line Item Request - Line Item Priorities tab you assign a Priority Code (i.e., New Request, High Priority) and an Action Code (i.e., Forward the Request to the Next Level for Approval) for each line item. The scroll bar on the right side will indicate whether or not you have additional line items. Once you have assigned these codes the line items are ready to be reviewed at the next level within your Division.

**Budget Request ID:** AA08004

**Line Item Priorities**

**Line Ref #:** 001 **Line Desc:** aceg **Activity Date:** 04-OCT-2007 **User Id:** STUGGP

**Level Code:** PROV **Provost** **Priority Code:** **Action Code:** FRWD **FORWARD Request**

**Line Ref #:** 001 **Line Desc:** aceg **Activity Date:** 04-OCT-2007 **User Id:** STUGGP

**Level Code:** BO **Budget Office** **Priority Code:** NEWL **Ne**

**Line Ref #:** 001 **Line Desc:** aceg

**Line Ref #:** 002 **Line Desc:** bdfh

**Level Code:** BO **Budget Office** **Priority Code:** NEWH **Ne**

**FWRBLNE\_BLPR\_LOV**


Find 00%

Fwrblne_Req_Line...	Fwrblne_Line_Desc
001	aceg
002	bdfh

End OK Cancel

Choices in list: 2  
Record: 1/6


## FWABREQ - Line Item Priorities

1. Arrow down or, use the scroll bar on the right to get to the Line Ref # 's
2. Your appropriate Level Code should be displayed, but if it is not displayed for one or more line items when you first enter this screen, arrow down and search for the appropriate code for that line item. If the code is not listed, arrow down to a blank a record, click on Line Item to choose a Line Item and then click on Level Code and choose the appropriate code (may use drop down box )
3. Click on Priority Code to assign a priority code for a line item. There are three priority codes to choose between. **New** for items which have not been previously requested; **Prior Year** for anything which has been requested in a prior year or budget process; and **Unavoidable** for items you feel the cost of is something you cannot avoid. 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 & Action Codes have been assigned for all line items
7. Hit Save  and Exit

On the **FWABRPR** form the Header Record is where you assign a Priority Number and an Action Code for the Budget Request. Once you have assigned a priority number and an action code the Budget Request is ready for review at the next level within your Division

The screenshot shows the 'FWABRPR' form in a web browser. At the top, there are fields for 'Budget Year', 'Budget Cycle', 'Division Code', 'Level', 'Final Decision', and 'Budget Request Id'. Below these is a tabbed interface with 'Header Record' selected. The main section is titled 'Budget Request Header Information' and contains a table with four rows. Each row has columns for 'Budget Id', 'Title', 'Final Decision', 'Priority No.', and 'Action Code'. The first row also includes 'Total Current Permanent Amount', 'Total Current year OneTime Amount', 'Total Next Year Perm Amount', and 'Total Next Year OneTime Amount'. Two blue callout boxes with arrows point to the 'Priority No.' and 'Action Code' fields in the first row. The first callout says 'Enter a Priority Number (i.e., 1, 2, 4, 10)'. The second callout says 'Enter an Action Code of Forward, Hold or Deny Request.' At the bottom of the form, there is a footer with the text 'Enter the 4 digit budget year of the request' and 'Record: 1/1 | ... | <OSC>'.

## FWABRPR - Header Record

- To begin the review process for a Budget Request in this form go to Budget Year and type in the year as noted in the Guidance provided to you by the Budget Office (i.e., 2008)
- Click on Budget Cycle and choose the Budget Process as noted in the Guidance provided by the Budget Office (may use drop down box )
- Click on Division Code, enter the division code. Choose ALL to view all divisions at one time (may use drop down box )
- Click on Level and choose your appropriate level code (i.e., Department, VC, etc.).
- Do not enter any data in the Final Decision query box
- At this point, you may click on Budget ID to look at a particular request (may use drop down box ) , or hit Next Block  to see all requests. Budget Request IDs are listed in alphabetical order by division (i.e., AA08001 is for Academic Affairs). A Divisional abbreviation listing is shown below:

AA – Academic Affairs  
BA – Business Affairs  
CH – Chancellor’s Office


PS – Public Service  
SA – Student Affairs  
UA – University Advancement

## FWABRPR - Header Record (cont.)

- Arrow down/up between the Budget Requests to the request you wish to review. The scroll bar on the right side will indicate whether or not you have additional requests
- Enter a Priority No. for the Request in the Priority No. field
- Click on Action Code and enter an action code of Forward, Hold or Deny for the Request. You will be prompted by the system to determine if the action code you are setting for the “Header”, or overall budget request, is the same action code you wish to assign for each line item. If this is true simply answer yes and the action code will be set for all line items within that budget request. If this is not true answer no and assign an action code for each individual line item on the Line Item tab




### Note

The Cabinet Allocated code is for Budget Office use only

- Hit Save  and Exit or, click on the Line Item Tab to assign Priority Codes and Action Items for each line item.



## FWABRPR - Line Item Request

1. Arrow to the appropriate Line Ref No (The scroll bar on the right side will indicate whether or not you have additional line items to view for this request)
2. Click on Priority Code to assign a priority code for that line item. There are three priority codes to choose between. **New** for items which have not been previously requested; **Prior Year** for anything which has been requested in a prior year or budget process; and **Unavoidable** for items you feel the cost of is something you cannot avoid. Then there are three levels to choose from for each priority code, High, Medium and Low. (may use drop down box )
3. Go to Action Code and enter the appropriate code, unless you opted to have the action code default from the Header Record tab. In this case the code will already be in place. Note: the Cabinet Allocated code is for Budget Office use only (may use drop down box )
4. The *Activity Date* and *User ID* automatically default when the document is saved
5. Repeat Script until Priority & Action Codes have been assigned for all line items
6. Hit Save  and Exit



Questions...