



*Purchasing  
Budget Request Recommendation  
Training*

*February 2008*



# Purchasing Budget Request Review & Recommendation

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## Budget Request Process Overview

The Budget Request submission process has been automated and is accessible through Banner. Forms have been created in Banner which standardize the budget request entry process as well as the Review and Recommendation process used by Purchasing.

Budget Requests requiring Purchasing recommendation may be entered during any of the budget processes, as ordered and 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)



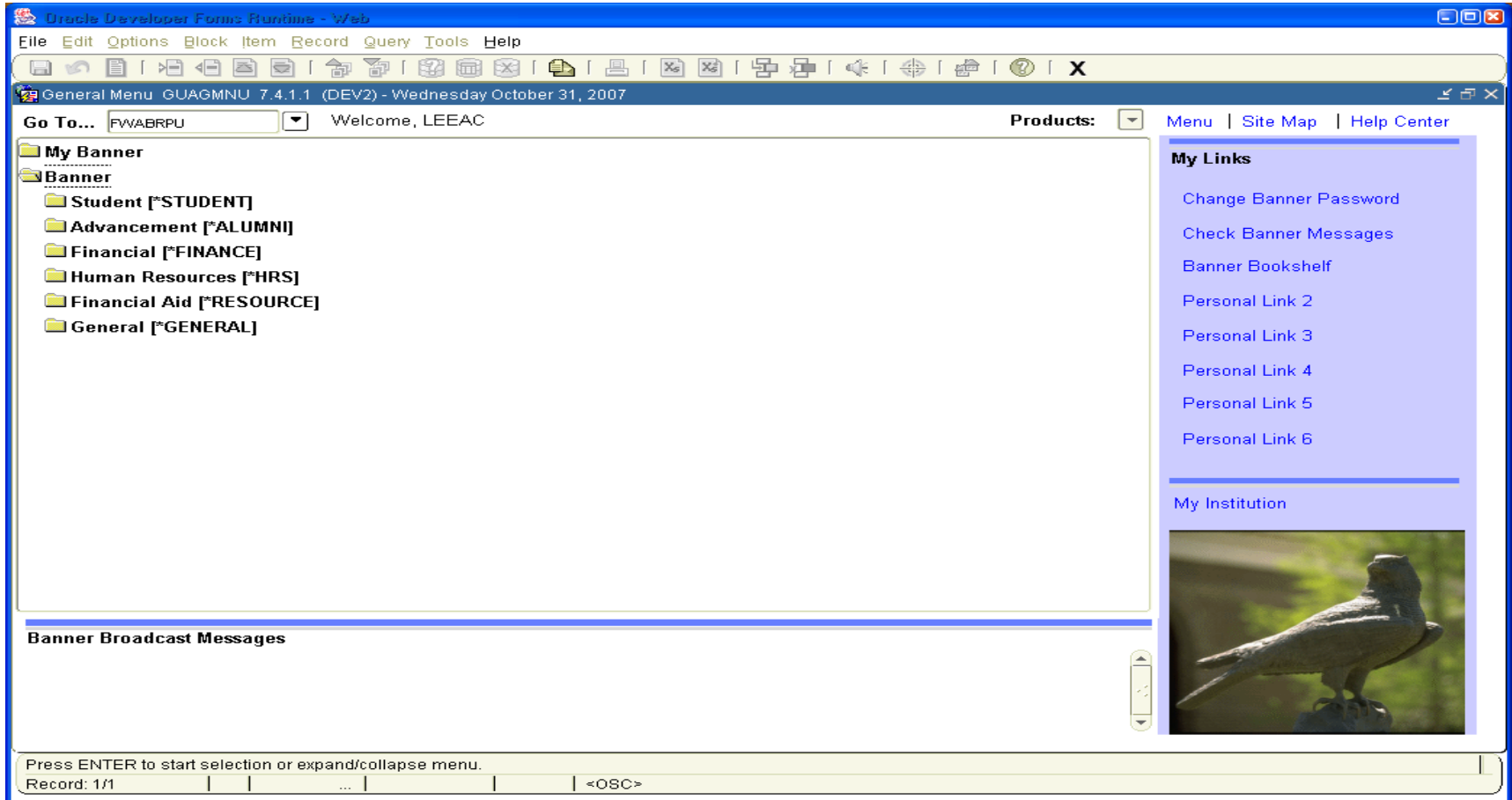
When a Budget Request is initially entered into Banner is when it is determined if a Review and Recommendation will be needed by Purchasing.

A Recommendation would typically be requested under the following criteria:

- Item(s) with a Cost above Capitalization Threshold
- Consulting Services
- Purchases Requiring Lead Time

# Purchasing Recommendation Form

Log into Banner. To navigate to the Purchasing Recommendation form type **FWABRPU** in the Go To box and hit “Enter”.



The screenshot displays the Banner system interface within a web browser window titled "Oracle Developer Forms Runtime - Web". The browser's address bar shows "General Menu GUAGMNU 7.4.1.1 (DEV2) - Wednesday October 31, 2007". The main interface features a "Go To..." field with "FWABRPU" entered, a "Welcome, LEEAC" message, and a "Products:" dropdown menu. A navigation menu on the left lists "My Banner" and "Banner" sub-menus, with "Banner" expanded to show "Student [\*STUDENT]", "Advancement [\*ALUMNI]", "Financial [\*FINANCE]", "Human Resources [\*HRS]", "Financial Aid [\*RESOURCE]", and "General [\*GENERAL]". A right-hand sidebar contains "My Links" (Change Banner Password, Check Banner Messages, Banner Bookshelf, Personal Link 2-6) and "My Institution" with a photograph of a bird. The bottom status bar includes the instruction "Press ENTER to start selection or expand/collapse menu." and "Record: 1/1".

# Purchasing Recommendation Form ~ Header Record

Oracle Developer Forms Runtime - Web: Open > FWABRPV

File Edit Options Block Item Record Query Tools Help

Budget Request Purchasing Approval Form FWABRPV 7.0 (DEV2)

Budget Year: 2008 Budget Cycle: AA Annual Allocation

Division Code: ALL All Divisions Budget Request ID: [ ]


Header Record Line Item Request

### Budget Request Header Information

Budget Req Id	Title	Final Decision
AA08001	CAS Renovation Projects College of Arts and Sciences Ac	[ ]
	<b>Total Current Permanent Amount</b>	<b>Total Current year OneTime Amount</b>
	174,000	0
	<b>Total Next Year Perm Amount</b>	<b>Total Next Year OneTime Amount</b>
	0	0
AA08002	CAS-Social Research Specialist Academic Affairs Provost	[ ]
	<b>Total Current Permanent Amount</b>	<b>Total Current year OneTime Amount</b>
	47,474	47,474
	<b>Total Next Year Perm Amount</b>	<b>Total Next Year OneTime Amount</b>
	0	0
AA08003	ITSD Annual Allocation Information Technology System	[ ]
	<b>Total Current Permanent Amount</b>	<b>Total Current year OneTime Amount</b>
	198,297	0
	<b>Total Next Year Perm Amount</b>	<b>Total Next Year OneTime Amount</b>
	0	0
[ ]	[ ]	[ ]
	<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>
	[ ]	[ ]

Record: 1/3 | ... | <OSC>

## Purchasing Recommendation Form ~ Header Record

- To begin the Review and Recommendation process for Purchasing for a Budget Request 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 (may use drop down 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

PS – Public Service

IT - Information Technology

BA – Business Affairs

UA – University Advancement

CH – Chancellor’s Office

SA – Student Affairs

- 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.
- Click on the Line Item Request tab to get to the individual line items for that request

Click on Line Item Request to check the Purchasing Reviewed box and enter Purchasing Recommendation comments

Oracle Developer Forms Runtime - Web: Open > FWABRPU

File Edit Options Block Item Record Query Tools Help

Budget Request Purchasing Approval Form FWABRPU 7.0 (DEV2)

Budget Year: 2008 Budget Cycle: AA Annual Allocation

Division Code: ALL All Divisions Budget Request ID: [ ]

Header Record Line Item Request

**Line Item Information**

Line Ref No: 001 Final Decision: FF Fully Funded

Desc: Renovate DO230 FTE: [ ]

Fund: 121981 College Of Arts/Sci EPA/SPA Position Title: [ ]

Organization: 32000 College of Arts and Sciences Admin Account: 102140 Allotted State Appropriation

Program: 101 Instruction Activity: [ ]

Category Code: RENO Renovations

Current Year Perm Amt: 114,000 Current Year One Time Amt: [ ] Next Year Perm Amt: [ ] Next year One-Time Amt: [ ]

Year + 2 Perm Amt: [ ] Year + 2 One-Time Amt: [ ] Year + 3 Perm Amt: [ ] Year + 3 One-Time Amt: [ ]

Year + 4 Perm Amt: [ ] Year + 4 One-Time Amt: [ ] Recurring Amount: [ ]

Approvals: [ ] HR A [ ]

HR Appro [ ] Com [ ]

Facility App [ ] Fac [ ]


Purchasing Approved:  Purch [ ]

Activity Date: 04-OCT-2007 Comment: [ ]

User Id: STUGGP Budget Office Comment: [ ]

Record: 1/2 | | | | <OSC>

## Purchasing Recommendation Form ~ Line Item Request

- In the Line Item Requests tab the Purchasing Reviewed box and Purchasing Recommendation comment field are the only two fields which are enterable. ALL other fields are view only
  
- Upon entering this screen you will automatically be at the Purchasing Reviewed box.
  1. Check (✓) the box to acknowledge your review of this line item request
  
  1. Tab to the Purchasing Recommendation field and enter comments as appropriate
  
  1. Use the down Arrow to get to other line items, if appropriate. The scroll bar on the right side will indicate whether or not you have additional line items.
  
  1. Repeat Script until all items have been reviewed and a recommendation made
  
  5. Hit Save  and Exit form



Questions.....