



FINANCIALS CUBE - UCMPLAN

SUBMIT AN ANNUAL BUDGET REQUEST

Updated December 8, 2022

©2020 UC Merced. All Rights Reserved.

SUBMIT A GL TO GL REQUEST FOR THE ANNUAL BUDGET

UC Merced's employees will use these steps to create and submit a GL to GL Request for the annual budget for approval. They will also check the approval status of the Budget Request.

Budget Requests are operational or line item requests for funds that allow planners to track budget enhancement or adjustments on top of the baseline budget. Campus Users, Campus Viewers, and FP&A are the roles involved in creating and managing Budget Requests in the Financials cube.

The tasks each role can perform are:

Campus Users will be able to:

- Create and submit GL to GL budget requests for approval
- View PPM budget requests

Campus Viewers will have:

• View-only access to budget requests

FP&A users will be able to:

- Create and approve GL to GL budget requests
- Create offset budget requests for PPM budget requests
- Create and approve PPM budget requests

To perform this task, log into UCMPLAN – the Oracle Planning & Budgeting (EPBCS) application

https://planning-a591502.pbcs.us2.oraclecloud.com/HyperionPlanning

The menu path chosen is dependent on the UC Merced user role assigned:

Campus Users:

Tasks >> Budget Request - Campus User >> Manage Budget Request - Annual Budget >> Request for GL or Default Project to GL Project



FP&A Users:

Tasks >> Budget Request - FPA User >> Manage Budget Request - Annual Budget >> Request for GL or Default Project to GL Project

System Steps:

1. Click the **Tasks** infolet



- 2. In the **Tasks: All Task Lists** page, click the triangle to expand the **Budget Request FPA User** task
 - a. Click the triangle to expand the **Manage Budget Request Annual Budget** task
 - b. Click the **Request for GL or Default Project to GL Project** task hyperlink

Tasks: All Task Lists				<u>R</u> efresh
T Filter: All 1				
Name	Status	Start	End	Instructions
WorkForce Budget - FPA User	•			0
Project Budget - FPA User	•			Θ
Budget Request - FPA User	•			Θ
Manage Budget Request - Annual Budget	•			0
Request for GL or Default Project to GL Project	•			Θ
Workforce Offset Request	•			0
Approve or Reject Budget Requests	•			Θ

3. Click the **Fund** hyperlink.

Request for GL or Default Project	t to GL Project ¹	50 L	Save Refresh	Actions Com	nplete	<u>P</u> revious	<u>N</u> ext	Close
Years Fund FY23 19900 STATE GENERAL FUND					and the	¢	<u>D</u> ata	F <u>o</u> rmat



4. Enter the fund number in the **Search Fund** field of the **Select a Member** page and press **Enter** on keyboard **OR** navigate through the fund groups to select the appropriate fund.





5. Click on the **Fund** and ensure the selection has the blue check mark active.



- 6. Click OK.
- 7. Click the **Right Arrow** to accept the fund change. If the fund field is yellow, the change has not been accepted.

Request	for GL or Default	Project to GL	Project		S. S.	Save <u>R</u> efrest	n <u>A</u> ctions ▼	<u>C</u> omp	lete	Previous	<u>N</u> ext	Close	
Years FY23	Fund 19900 STATE GENERAL FUND	5						7	→		¢	<u>D</u> ata	F <u>o</u> rmat
	Request	Description	Requested by	UserID	Request Type	Submitted for	Final Approval	Budae	t Amount	•			

- 8. Right click in an empty cell in the **Request for GL or Default Project to GL Project** page to view the **Actions** menu
 - a. Click the Create Decision Package by Fund option
 - i. If a Budget Request for the Fund already exists for the applicable Budgetary Org, use the existing Decision Package to add additional Budget Request lines and do not create a new Decision Package. If using a pre-existing Decision Package, continue to Step 8 below.

Request	for GL or De	fault Proje	ct to GL Proj	ject							BR I	Save Befresh Actions	-	<u>C</u> omplete	Previou	s <u>N</u> ext	Cļose
Years FY21	Fund FD_10000												/	٥	Data A	d hoc	F <u>o</u> rmat
	Req_Num	Description	Requested_by	UserID	Request_Type	Submit for Approval	Approval Status	Budget a	mount								
	Working	Working	Working	Working	Working	Working	Submitted	Working	Final		0.	Create Decision Reckage by Fund					
BUD_Req1	2,110,000,101	WF Offset	E100000 ACADEMIC PERSONNEL	Akansha FNU		Yes	Approved	100,000	8	000		Request Line	•				
BUD_Req2	2,110,000,102	Worforce Offset	E100000 ACADEMIC PERSONNEL	Lucero Mascorro	Operational Request	Yes	Under Review	5,000			G	Delete Decision Package					
BUD_Req3	2,110,000,103	Non-reportable Position Pool	E101000 PROVOST & EVC	Maria Tinoco	Operational Request	Yes	Under Review	0		0		Analyze					
BUD_Req4	2,110,000,104	Workforce Offset 2	E103000 UNDERGRADUAT E EDUCATION	Erika Macias	Operational Request	Yes	Approved	0		0	*	New Ad Hoc Grid Show Reasons for Read-Only Cells					
BUD_Req5	2,110,000,105	Test2	E101000 PROVOST & EVC	Campus User	Operational Request	No	Rejected	0				Predictive Planning Business Rules					
BUD_Req6	2,110,000,106	Test 8/17	E100000 ACADEMIC PERSONNEL	FP&A User	Operational Request	Yes	Approved	0		0	115	Smart Push Details Grid Validation Messages					
BUD_Req7	2,110,000,107	Workforce Offset 3	E103000 UNDERGRADUAT E EDUCATION	Sarath Thangi	Operational Request	No		0				Clear Formatting					
BUD_Req8	2,110,000,108	Sit 2 Test	M599000 SPECIAL PROJECTS	Rosie Ricketts	PPFM Request	Auto Approved	Auto Approved	0				Open in Smart View					
BUD_Req9	2,110,000,109	Workforce Offset Request	AFS0001 SIT Testing	Lucero Mascorro	Operational Request	Yes	Under Review	0									



- 9. In the **BR_CreateRequestByFund** pop-up window, enter the following information as required (***mandatory** data fields are indicated by an asterisk):
 - a. ***Requested Description:** enter a request description based on the UCM naming convention

<Date_Description of Request>

Example: 11.1.22_FY23 Budget Call Allocations

b. ***Requested By:** value defaults but can be changed if needed. Value should be the Source CCOA's FIN/HR Unit. This may sometimes differ from FIN/HR unit of the person submitting the request.

Example 1: Request submitted by staff in School of Engineering (E200000), however, funding **source** is a CCOA in the Provost Office (E101000). The "Requested By" field would reflect E101000-Provost Office.

10. Click the **Launch** button

BR_C	CreateRequestB	yFund		10
9	* Request Description	11.2.22_FY23 Budget Allocation	* Requested By	E101000 Provost Office
0				

11. In the Information pop-up window click the OK button





12. Back in the **Request for GL or Default Project to GL Project** page, the new budget request is created. Select the new budget request created and right click to view the **Actions** menu

ears Y21	Fund FD_10000											/	۰ ۹	ata Ad hoc	Form
	Req_Num	Description	Requested_by	UserID	Request_Type	Submit for Approval	Approv Status	al Budget Amount							
	Working	Working	Working	Working	Working	Working		~							
oo_noqeo		Request mcooper4	COMMUNITY RELATION		Request		ßı	Create Decision Package by Fund							
D D07	2 110 000 13	GL2GLMNT12222	AES0001 SIT	Michelle Taylor	Operational	No		Request Line	Add Reques	t Line					
DD_Heq37	2,110,000,10	0	Testing	microne rayio	Request	140	G.	Submit For Approval	🔒 Review Requ	Jest Line					
UD_Req3	2,110,000,103	Non-reportable Position Pool	PROVOST & EVC	Maria Tinoco	Operational Request	Yes	Q	Delete Decision Package	0						
UD_Req10	2,110,000,110	PPFM Project Offset Request	E100000 ACADEMIC PERSONNEL	Souvik Ghosh	PPFM Request	12		Adjust	0						
UD_Req8	2,110,000,108	Sit 2 Test	M599000 SPECIAL PROJECTS	Rosie Ricketts	PPFM Request	Auto Approved	1 1 1	Supporting Detail	-						
UD_Req12	2,110,000,112	Test	AFS0001 SIT Testing	Paritosh Soni	Operational Request	Yes	©1	Change History Attachments	0						
UD_Req6	2,110,000,106	Test 8/17	E100000 ACADEMIC PERSONNEL	FP&A User	Operational Request	Yes	6 (3)	Lock/Unlock Cells Analyze	0						
UD_Req5	2,110,000,105	Test2	E101000 PROVOST & EVC	Campus User	Operational Request	No	*	New Ad Hoc Grid Show Reasons for Read-Only Cells							
UD_Req1	2,110,000,101	WF Offset	E100000 ACADEMIC PERSONNEL	Akansha FNU		Yes		Predictive Planning Business Rules	0						
JD_Req36	2,110,000,136	WFOR	AFS0001 SIT	Michelle Taylor	Operational	Yes		~							

a. Select the **Request Line** option, and then select the **Add Request Line** option

13. On the **blank left** side of the **Annual Budget Request GL to GL** page, right click to view the **Actions** menu

Annual Bu	iget Request GL to G	L > Annual Bu	dget Allocation GL	to GL											
Fund FD_10000	Years FY21												0	Data Ad hoc	F <u>o</u> rmi
							Eiseline	Total Baseline BUD_Re	q37 BL	JD_Req37	BUD_Req37				
							Q	Add Adjustment		AB_RC	AB_OT				
							-	Filter Analyze	•	Norking	Working Comments				
							- ÷	New Ad Hoc Grid	E 1	YearTotal	BegBalance				
						539000		Show Reasons for Read-Only Ce	lls						
BO_E102000	PJ_000000000	FN_00	PG_000	LC_000	SA_000000	540 13	1	Predictive Planning							
3O_Z800000	PJ_000000000	FN_00	PG_000	LC_000	SA_000000	4000		Business Rules							
						469000		Smart Push Details							
						525200	112	Grid Validation Messages							
						539504									
						550200		Clear Formatting							
						560000		Spreadsheet Export							
		FN_44	PG_000	LC_000	SA_000000	520250		Open in Smart View							
						520500	_	5,000							
						520600	-	4,000							
						539000	-2	2,000							

a. Click the **Add Adjustment** option

14. In the **UCM_RS_CreateAdjReq** pop-up window, enter the following information as required (***mandatory** data fields are indicated by an asterisk):

Note: Source is where the budget is coming from, Target is where the budget is going to

- a. ***1:Amount:** enter the appropriate value for this annual budget request
- b. ***Source BudOrg:** enter the appropriate value for this annual budget request
- c. ***Source Project:** enter the appropriate value for this annual budget request
- d. *Source Function: enter the appropriate value for this annual budget request
- e. ***Source Program:** enter the appropriate value for this annual budget request
- f. *Source Location: enter the appropriate value for this annual budget request
- g. *Source SubActivity: enter the appropriate value for this annual budget request
- h. *Source Account: enter the appropriate value for this annual budget request
- i. ***Scenario:** enter the appropriate value for this annual budget request
 - i. Users may select **AB_OT**.
- j. ***Target BudOrg:** enter the appropriate value for this annual budget request
- k. *Target Project: enter the appropriate value for this annual budget request
- l. *Target Function: enter the appropriate value for this annual budget request
- m. *Target Program: enter the appropriate value for this annual budget request
- n. *Target Location: enter the appropriate value for this annual budget request
- o. *Target SubActivity: enter the appropriate value for this annual budget request
- p. ***Target Account:** enter the appropriate value for this annual budget request

M_I	RS_CreateAdjl	Req			15	
	* 1:Amount	500		* Scenario	AB_OT	
.4	* Source BudOrg	BO_E101000	ę _ę	* Target BudOrg	BO_E200000	
	* Source Project	PRJ0000001	ę _c	* Target Project	PRJ0000001	
	* Source Function	FN_00	ç _ç	* Target Function	FN_40	
	* Source Program	PG_000	P _Q	* Target Program	PG_000	
	* Source Location	LC_000	7 ₀	* Target Location	LC_001	
	* Source SubActivity	SA_B00001	7 ₀	* Target SubActivity	SA_A00004	
	* Source Account	52200B_BUDGET_INPUT	P.0.	* Target Account	52200B_BUDGET_INPUT	

15. Click the **Launch** button

16. In the **Information** pop-up window click the **OK** button



17. Back in the **Annual Budget Request GL to GL** page, click the **Save** button

for GL or De	fault Proje	ect to GL P	roject						BS (Save F fresh	Actions + Com	plote Previous Next	Ciose		
iget Request GL to G	L > Annual Budge	t Allocation GL to	GL												
Years FY21										17	\$	Data Ad hoc Fo	ermat		
						Baseline	Total Baseline	BUD_Req37	BUD_Req37	BUD_F					
						Actual	Annual Budget	AB_OT	AB_RC	AB_OT					
						Final	Final	Working	Working	Working Comments					
						YearTotal	YearTotal	YearTotal	YearTotal	BegBalance					
					539000	-996	3								
PRJ0000001	FN_00	PG_000	LC_000	SA_B00001	52200B_BUDGET_INPUT			-50	0				۰.		
PJ_000000000	FN_00	PG_000	LC_000	SA_000000	540000	2,000)								
PRJ0000001	FN_40	PG_000	LC_001	SA_A00004	52200B_BUDGET_INPUT			50	0						
PJ_000000000	FN_00	PG_000	LC_000	SA_000000	400000	-20)								
					400400	-50)								
					469000	1,000)								
					525200	-5,700)								
					539504	1,313	3								
					550200	-11,579)								
					560000	-150)								
	FN_44	PG_000	LC_000	SA_000000	520250	-6,000)								
					520500	-6,000)								
					520600	-4,000)								
					539000	-22,000)								
	For GL or De type Wars PPL0000001 PJ_00000001 PJ_00000001 PJ_000000001 PJ_000000000	Processor Processor PPL00000001 PN.40 PPL00000000 PN.40 PPL00000000 PN.40 PPL00000000 FN.40 PL000000000 FN.40	Process Project to GL P Annual Budget Allocation GL to CL P Annual Budget Allocation GL to Views Views Project Allocation GL to CL P Annual Budget Alloca	Production GL or Default Project to GL Project © Image: Control of the	Ror GL or Default Project to GL Project © Non-2002 Project to GL > Annual Budget Allocation GL to GL Non-2002 Project to GL > Annual Budget Allocation GL to GL Non-2002 Project to GL > Annual Budget Allocation GL to GL Non-2002 Project to GL > Annual Budget Allocation GL to GL Project to GL > Annual Budget Allocation GL to GL Project to GL > Annual Budget Allocation GL to GL Project to GL > Annual Budget Allocation GL to GL Project to GL > Annual Budget Allocation GL to GL Project to GL > Annual Budget Allocation GL > GL > GL > GL > Annual Budget Allocation GL > GL	None None <th< td=""><td>Several Budget Alocation GL to GL Several Budget Alocation GL to GL Note: Several Budget Alocation GL to GL Note: Several Budget Alocation GL to GL Plancocotion <th col<="" td=""><td>Ar C B C S - X - Name Buckster I C B C S - X - Name Buckster I C B C S - X - Name Buckster I C B C S - X - Name Buckster I C B C S - X - X - X - X - X - X - X - X - X -</td><td>Sevent all broads to call broads to call broads Sevent all broads to call broads Pland to call broads Pland to call broads Sevent all broads to call broads No.000 Pland to call broads Sevent all broads <th colspa<="" td=""><td>Rote Calculation Calcul</td><td></td><td></td><td>Reference of a construction of a construc</td></th></td></th></td></th<>	Several Budget Alocation GL to GL Several Budget Alocation GL to GL Note: Several Budget Alocation GL to GL Note: Several Budget Alocation GL to GL Plancocotion Plancocotion <th col<="" td=""><td>Ar C B C S - X - Name Buckster I C B C S - X - Name Buckster I C B C S - X - Name Buckster I C B C S - X - Name Buckster I C B C S - X - X - X - X - X - X - X - X - X -</td><td>Sevent all broads to call broads to call broads Sevent all broads to call broads Pland to call broads Pland to call broads Sevent all broads to call broads No.000 Pland to call broads Sevent all broads <th colspa<="" td=""><td>Rote Calculation Calcul</td><td></td><td></td><td>Reference of a construction of a construc</td></th></td></th>	<td>Ar C B C S - X - Name Buckster I C B C S - X - Name Buckster I C B C S - X - Name Buckster I C B C S - X - Name Buckster I C B C S - X - X - X - X - X - X - X - X - X -</td> <td>Sevent all broads to call broads to call broads Sevent all broads to call broads Pland to call broads Pland to call broads Sevent all broads to call broads No.000 Pland to call broads Sevent all broads <th colspa<="" td=""><td>Rote Calculation Calcul</td><td></td><td></td><td>Reference of a construction of a construc</td></th></td>	Ar C B C S - X - Name Buckster I C B C S - X - Name Buckster I C B C S - X - Name Buckster I C B C S - X - Name Buckster I C B C S - X - X - X - X - X - X - X - X - X -	Sevent all broads to call broads to call broads Sevent all broads to call broads Pland to call broads Pland to call broads Sevent all broads to call broads No.000 Pland to call broads Sevent all broads <th colspa<="" td=""><td>Rote Calculation Calcul</td><td></td><td></td><td>Reference of a construction of a construc</td></th>	<td>Rote Calculation Calcul</td> <td></td> <td></td> <td>Reference of a construction of a construc</td>	Rote Calculation Calcul			Reference of a construction of a construc

18. In the **Information** pop-up window click the **OK** button





D_10000 I	FY21	L / Intal Dug	A Allocation de lo	u.								0	Data Ad hoc
							Baseline	Total Baseline	BUD_Req37	BUD_Req37	BUD_Req37		
	19						Actual	Annual Budget	AB_OT	AB_RC	AB_OT		
							Final	Final	Working	Working	Working Comments		
							YearTotal	YearTotal	YearTotal	* YearTotal	BegBalance		
						539000	-996						
D_E101000	PRJ0000001	FN_00	PG_000	LC_000	SA_B00001	52200B_BUDGET_INPUT			-50	0			
D_E102000	PJ_000000000	FN_00	PG_000	LC_000	SA_000000	540000	2,000						
D_E200000	PRJ000001	FN_40	PG_000	LC_001	SA_A00004	52200B_BUDGET_INPUT			50	0			
_Z800000	PJ_000000000	FN_00	PG_000	LC_000	SA_000000	400000	-20						
						400400	-50						
						469000	1,000						
						525200	-5,700						
						539504	1,313						
						550200	-11,579						
						560000	-150						
		FN_44	PG_000	LC_000	SA_000000	520250	-6,000						
						520500	-6,000						
						520600	-4,000						
						539000	-22,000						

19. Click the Annual Budget Request GL to GL hyperlink in the upper left corner

ATTACHMENTS

Budget Requests must have a <u>Budget Request</u> form attached that includes all information noted on each tab.

- 20. Back in the **Request for GL or Default Project to GL Project** page, right click the new budget request number created to view the **Actions** menu
- 21. Select the Attachments option

Request	for GL or De	fault Projec	t to GL Proje	ct						8	R 💼	Save Befr	resh Action:	•	Complet	e <u>P</u> revio	us <u>N</u> ex	t Ciose
Years FY21	Fund FD_10000													/	¢	Data	Ad hoc	F <u>o</u> rmat
20	Req_Num	Description	Requested_by	UserID	Request_Type	Submit for Approval	Approval Status	Budget Amount										
	Working	Working	Working	Working	Working	Working		~	1									
BUD_Req37	2,110,000,137	GL2GLMNT12222 0	AFS0001 SIT Testing	Michelle Taylor	Operational Request	No	Create De Request I	cision Package by Fund										
BUD_Req3	2,110,000,103	Non-reportable Position Pool	E101000 PROVOST & EVC	Maria Tinoco	Operational Request	Yes	Submit Fi	or Approval	0									
BUD_Req10	2,110,000,110	Offset Request	E100000 ACADEMIC PERSONNEL	Souvik Ghosh	PPFM Request	Auto Approve	Edit Adlust) I	,000									
BUD_Req8	2,110,000,108	Sit 2 Test	M599000 SPECIAL PROJECTS	Rosie Ricketts	PPFM Request	Auto Approve	Comment	5										
BUD_Req12	2,110,000,112	? Test	AFS0001 SIT Testing	Paritosh Soni	Operational Request	Yes	Supportin	g Detail listory	.000									
BUD_Req6	2,110,000,106	5 Test 8/17	E100000 ACADEMIC PERSONNEL	FP&A User	Operational Request	Yes	Attachme	nts		1								
BUD_Req5	2,110,000,105	i Test2	E101000 PROVOST & EVC	Campus User	Operational Request	No	Analyze	ock Cells										
BUD_Req1	2,110,000,101	WF Offset	E100000 ACADEMIC PERSONNEL	Akansha FNU		Yes	Show Rei	isons for Read-Only Cells	,000									
BUD_Req36	2,110,000,136	WFOR MNT122120	AFS0001 SIT Testing	Michelle Taylor	Operational Request	Yes	Business	Rules										
BUD_Req2	2,110,000,102	Worforce Offset	E100000 ACADEMIC REDSONNEL	Lucero Mascorro	Operational Request	Yes	Under Neview	V 0,000										



22. In the **Attachments** pop-up window click the **Browse** button.

	Attachments	Nõ.		P
22	Browse No file selected.			
			Upload	Close

- 23. Select the file to be attached
- 24. Double-click the file name, which will bring you back to the Attachments window
- 25. Wait a few seconds for the **Update** button to appear in the window.
- 26. Once the Update button appears, click the Upload button
- 27. Click the **Close** button

Attachments	1 0			N	
mtinoco					
11/5/22 9:23 AM		from	14000 to		
19900.xlsx Edit Delete	() Employees	Irom	14000 10		
Browse No file selected.	26	Г	Upload Cir	ise	
			opicad		

- 28. Back in the **Request for GL or Default Project to GL Project** page, select the new budget request created and right click to view the **Actions** menu
 - a. Select the Submit for Approval option
 - i. Decision Packages will be submitted for approval **once a week** for review and approval by FP&A. This allows campus users to input Budget Request Lines in one Decision Package by Fund for their respective unit(s) in a consolidated approach. This streamlines budget review and approval process by FP&A. It also ensures UCMPLAN maintains its performance processing speeds for improved user experience.



Oracle UCMPlan – GL to GL Annual Budget Request Step-by-Step Guide

Years FY21	Fund FD_10000											/	0	Data Ad	hoc Fg
	Req_Num	Description	Requested_by	UserID	Request_Type	Submit for Approval	App Sta	roval Budget Amount ttus							
	Working	Working	Working	Working	Working	Working	_								
3UD_Req37	2,110,000,137	GL2GLMNT12222 0	AFS0001 SIT Testing	Michelle Taylor	Operational Request	No	C,	Create Decision Package by Fund Request Line							
3UD_Req3	2,110,000,103	Non-reportable Position Pool	E101000 PROVOST & EVC	Maria Tinoco	Operational Request	Yes	C ·	Submit For Approval		28					
UD_Req10	2,110,000,110	PPFM Project Offset Request	E100000 ACADEMIC PERSONNEL	Souvik Ghosh	PPFM Request	Auto Approve	U)	Leiete Decision Package Edit I Adiust I	,000						
BUD_Req8	2,110,000,108	Sit 2 Test	M599000 SPECIAL PROJECTS	Rosie Ricketts	PPFM Request	Auto Approve	æ	Comments							
BUD_Req12	2,110,000,112	Test	AFS0001 SIT Testing	Paritosh Soni	Operational Request	Yes	*# ©	Supporting Detail Change History	000						
3UD_Req6	2,110,000,106	Test 8/17	E100000 ACADEMIC PERSONNEL	FP&A User	Operational Request	Yes	@ 6	Attachments Lock/Unlock Cells	0						
BUD_Req5	2,110,000,105	Test2	E101000 PROVOST & EVC	Campus User	Operational Request	No	() ()	Analyze New Art Hop Grid							
BUD_Req1	2,110,000,101	WF Offset	E100000 ACADEMIC PERSONNEL	Akansha FNU		Yes	ler i	Show Reasons for Read-Only Cells	,000						
BUD_Req36	2,110,000,136	WFOR MNT122120	AFS0001 SIT Testing	Michelle Taylor	Operational Request	Yes	+ - × +	Business Rules							
3UD_Req2	2,110,000,102	Worforce Offset	E100000 ACADEMIC	Lucero Mascorro	Operational Request	Yes		¥							

- 29. In the **UCM_Submit_Req_Push** pop-up window, enter the following information as required (***mandatory** data fields are indicated by an asterisk):
 - a. ***1:Comments:** enter the appropriate comments for the push request

<Date of Submission_Source CCOA's FIN/HR Unit_Description>

30. Click the Launch button

UCM_Submit_Req_Push	30 Launch Cancel
29 * 1:Comments 11.2.22_M514_TAS Budget	
9	

31. In the **Information** pop-up window click the **OK** button



32. Back in the **Request for GL or Default Project to GL Project** page, Select the new budget request created and notice the **Submitted for Approval Status** is changed to **Yes**; and the **Final Approval Status** is changed to **Under Review** for the budget request created and submitted.



33. Click the **Close** button

Years	Fund											1	0	ata Ad	hoc F <u>o</u> rm
FTZI	Req_Num	Description	Requested_by	UserID	Request_Type	Submit for Approval	Approval Status	Budget A	mount						
	Working	Working	Working	Working	Working	Working	Submitted	Working	Final						
BUD_Req10	2,110,000,110	PPFM Project Offset Request	E100000 ACADEMIC PERSONNEL	Souvik Ghosh	PPFM Request	Auto Approved	Auto Approved	12,000	12,000						
BUD_Req3	2,110,000,103	Non-reportable Position Pool	E101000 PROVOST & EVC	Maria Tinoco	Operational Request	Yes	Under Review	0	0						
BUD_Req37	2,110,000,137	GL2GLMNT12222 0	AFS0001 SIT Testing	Michelle Taylor	Operational Request	Yes	Under Review	0		32					
BUD_Req25	2,110,000,125	GL to GI Budget Request mccoper4	M120000 GOVT & COMMUNITY RELATION	Melanie Cooper	Operational Request	Yes	Under Review	0							
BUD_Req15	2,110,000,115	GL to GL Budget request-Craig	AFS0001 SIT Testing	Craig Ledebur	Operational Request	Yes	Under Review	0							

- 34. Back in the **Tasks: All Task Lists** page, click the triangle to expand the **Budget Request – FPA User** task
 - a. Click the triangle to expand the **Manage Budget Request Annual Budget** task
 - b. Click the **Workflow Status Annual Budget** task hyperlink

TASKS: AII TASK LISTS		<u>R</u> efresh
Name	Status Start E	nd Instructions
WorkForce Budget - FPA User	•	0
Project Budget - FPA User	•	0
Ja 🔲 Budget Request - FPA User	•	0
A 📓 Manage Budget Request - Annual Budget	•	Θ
34 Request for GL or Default Project to GL Project	•	0
Workforce Offset Request	•	0
Approve or Reject Budget Requests	•	Θ
Workflow Status - Annual Budget	•	

35. In the Workflow Status - Annual Budget page, select the new budget request created

- a. Review the budget created and notice the Final Approval Status is Under Review
- b. Users may return to this screen at any time to monitor the status of Decision Packages. Statuses include Under Review, Approved, and Rejected.

6. Cli	ck the	Close	butto	n											3
Norkflow	Status - An	nual Budget	t 🛈							шş	2	Save Refresh	ctions 🕶	<u>C</u> omplete Prev	vious <u>N</u> er Ci
Fund FD_10000													/	Data	Ad hoc Form
	Req_Num	Description	Request_Type	UserID	Approval Status	Comments	Requested_by		Budget Amount		Processed_By				
	Submitted	Submitted	Submitted	Submitted	Submitted	Submitted	Submitted	Submitted	FP&A Working	Final	FP&A Working				
		medanar monohor a	rindanar				RELATION								
BUD_Req37	2,110,000,137	GL2GLMNT12222 0	Operational Request	Michelle Taylor	Under Review	Submitting for FP&A approval	AFS0001 SIT Testing	0.00	0.00			35			
BOD_Hed3	2,110,000,100	Position Pool	Request	Maria Infoco	Citiber Herrew		PROVOST & EVC	0.00	0.00	0.00					

