

# Budget Adjustment Form

Instructions



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## Submitting a New Budget Adjustment Request

Steps to initiate a budget request:

- 1) Go to the “Dept” tab in the Excel file.
- 2) Fill out the form by answering all the required (highlighted) fields. A description of each field is provided later in this section for your reference.
  - a. When the Excel file is opened, the Name and Email fields are automatically populated (if they were previously blank).
  - b. If the description of the entered fund or organization code is not found, you can refresh the descriptions by clicking on the “Refresh FOAP Descriptions”.

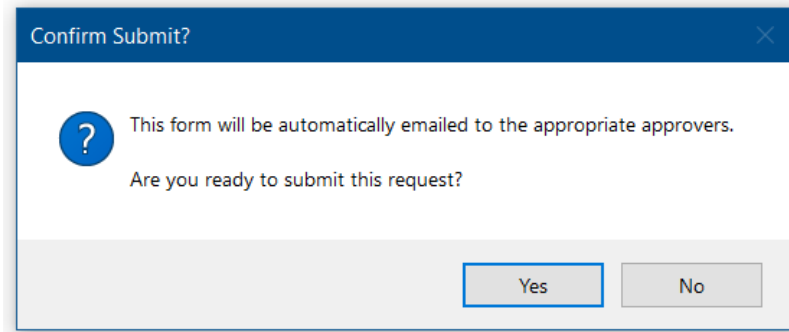
**Refresh FOAP Descriptions**

- c. If you answer “Yes” to collecting more revenue, then please note that a few additional questions will be required (highlighted) on the form before it can be submitted.
- 3) When you are finished entering information into the form and are ready to submit, click the button titled, “Submit for Division Approval”. This will automatically generate an email and will be sent to the appropriate division approver.

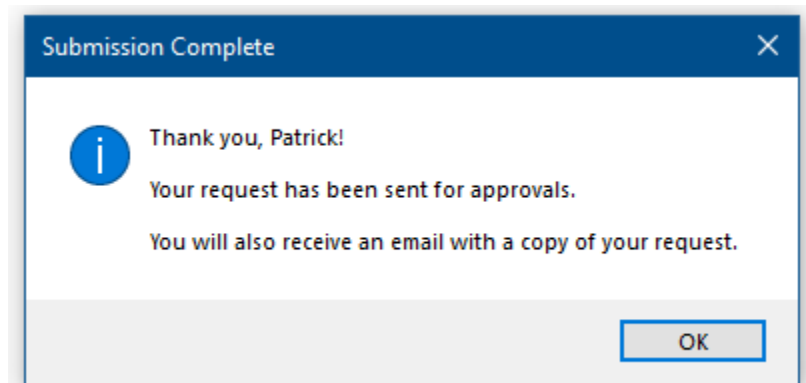
**Submit for Divison Approval**

- 4) A message prompt will appear confirming submission. Click “Yes” to continue or click “No” to cancel.

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- a. If any required question has not been answered, then a message will appear informing the user to provide an answer.
  - b. If the amount of budget increase requested exceeds an amount set by the Budget Office, then additional approvals will be needed. An additional message prompt will appear to inform the user that the additional approval is required.
- 5) After the form has been submitted, a confirmation message will appear. The requester will also be copied on the email that is sent to the division for approval.



## Description of Form Fields

**Name** – The name of the user who is requesting the budget adjustment.

**Department** – The name of the department associated with the budget.

**Phone** - A preferred contact number that the requestor can be reached at.

**Email** – The email address of the requester. This is automatically populated based on the user's PirateID.

**Select Division** – The division that the budget and requestor is associated with. The chosen division will determine where the budget request is sent to.

**Fund** - The Banner fund associated with the budget increase.

**Orgn** – The Banner organization code associated with the budget increase.

**Select Account** - The pool account associated with the budget increase.

**Amount Requested** - The amount of budget increase that is being requested.

**I will be collecting more revenue than originally budgeted** – Select “Yes” from the dropdown menu if the requested budget increase will be offset with additional revenue that was not originally budgeted.

**If yes, please explain** – Please provide an explanation about the additional revenue.

**If yes, how much?** – Please provide the amount of additional revenue that has been received or is anticipated for the current fiscal year.

**If yes, revenue account** – Enter the Banner revenue account code (5xxxx) that will contain the additional revenue.

**Explanation of increase of budget** – Provide an explanation on why the original budget needs to be revised and why these changes were not included with the original All Funds Budget Request.

## Submitting a Division Approval

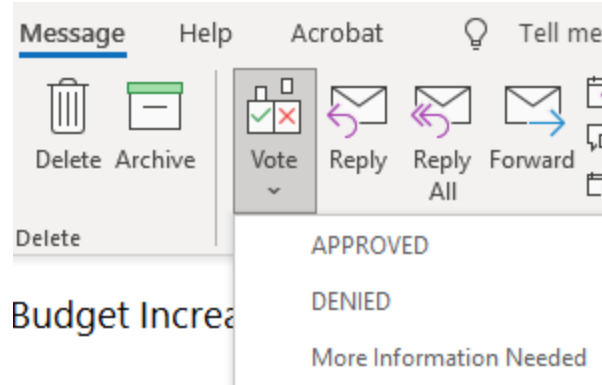
Steps to provide division approval:

- 1) As a division approver, you will receive an email that contains the original budget request information and the form attached as an Excel file.
- 2) Save the attached Excel file to your computer and open the file.
- 3) Go to the “Division” tab.
- 4) Review the information provided.
- 5) The financial summary provides a profit or loss report based on the FOAP of the budget request.
  - a. The report includes prior year actuals (as of period 12), current year accumulated budget, and the requested budget change.
  - b. The account associated with the budget increase is highlighted.
  - c. If a revenue account was provided, then a revenue line will also be provided to show the offset to the budget increase.
- 6) The budget data was refreshed at the time the request was submitted, however if you can refresh the data as needed by clicking the “Retrieve Current Budget”.

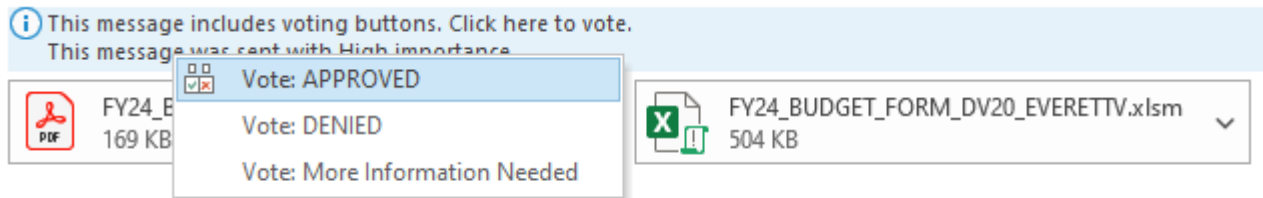
**Retrieve Current Budget**

- 7) The Banner transactions required for a budget adjustment are located on the “Budget Transfer” tab of the Excel file.
- 8) Once you have reviewed the request, you can use the included voting buttons in the email to respond to the requestor with your approval or denial. You can also edit the voting response before it is sent. This allows you to provide context, if necessary, and is similar to responding to meeting invitations.
  - a. You can access the voting buttons from three ways in Outlook, depending on your preference:
    - i. From directly within the email message on the Ribbon:

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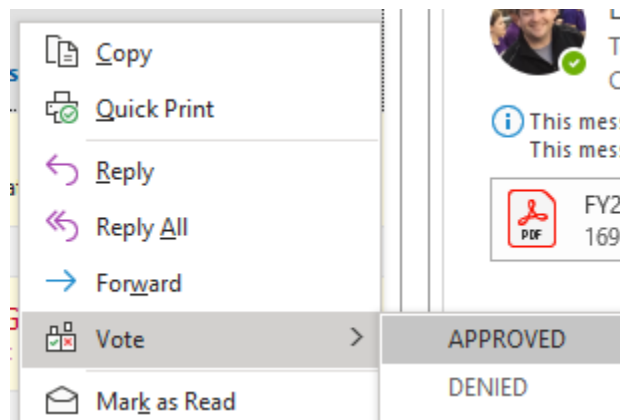


ii. From the Outlook Reading Pane:



Dear Recipient,

iii. From the list of emails:



Submit request to budget office (If necessary)

- 1) If the budget request exceeds the threshold set by the Budget Office, then Budget Office approval will also be required in addition to the division approval.
- 2) If the request is approved by the division, then click the button titled, "Submit for Budget Office Approval".

**Submit for Budget Office Approval**

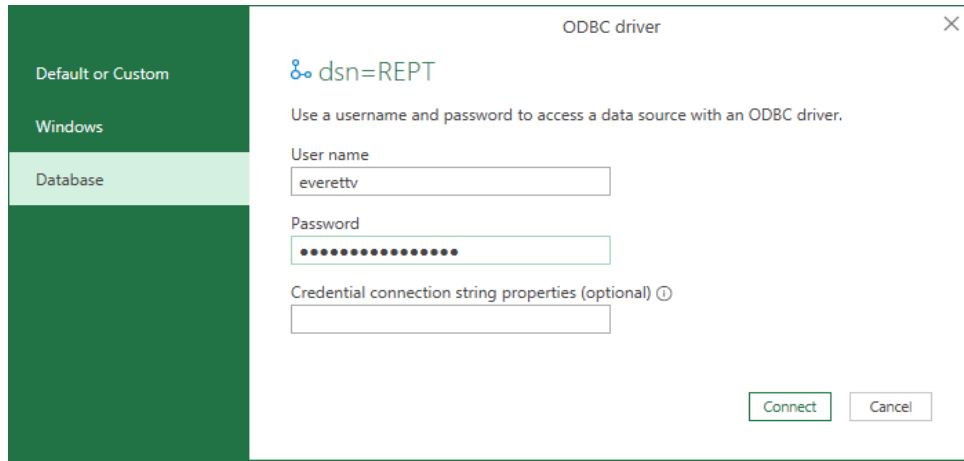
- 3) An email will be automatically generated and sent to the Budget Office for approval. The budget requestor and division approver will be copied on the email for reference. A copy of the request form will be attached which includes the required Banner transactions. The Excel file is also included. The attached PDF file can be used to supplement documentation for XTender.
- 4) The Banner transactions required for a budget adjustment are located on the "Budget Transfer" tab of the Excel file.



## Data Refresh Settings

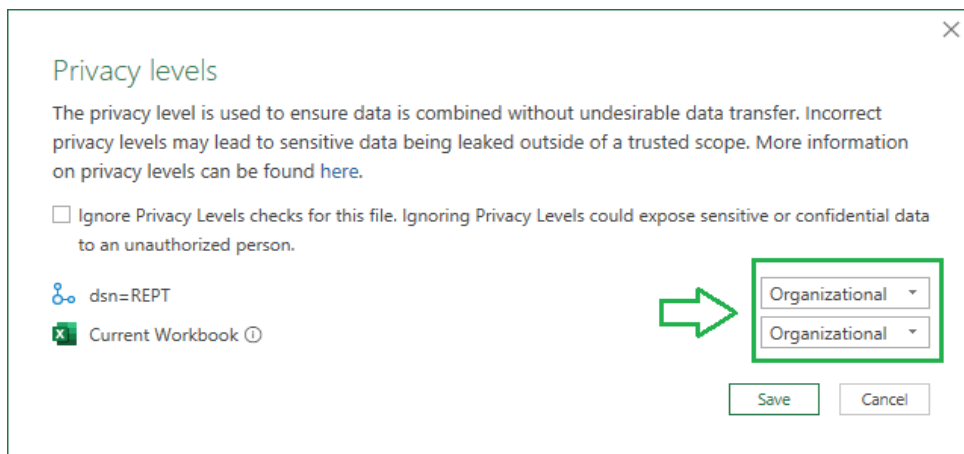
- 1) If you are using this form for the first time, you may receive a prompt for your username and password. Use your PirateID and REPT password and then select "Connect". This is safe and secure. This file has no knowledge of, or access to, your credentials since they are securely encrypted elsewhere on your computer. When you change your REPT credentials in the future, you will only be prompted once again to update them.

a. Example:



- 2) If you receive the prompt below, select "**Organizational**" for **BOTH** the "dsn=REPT" and "Current Workbook" and select "Save". You will only be asked this the first time as it will remember your settings going forward. There are no sensitive data in this file.

a. Example:




- 3) When running the queries for the first time, you may receive another prompt similar to the picture below. Select the "Run" option to continue. The query is safe to run and contains no sensitive data.

a. Example

### Native Database Query

Do you approve running this native query? Your approval will also apply to any occurrences of the same native query in other documents.

Native queries may be unsafe and alter the database. Because native queries may be rerun multiple times, those which do alter the database may result in incorrect or unpredictable behavior.

 dsn=REPT

```
SELECT
  T1.FISCAL_YEAR
, T1.FISCAL_PERIOD
, T1.FUND
, T1.FUND_DESC
, T1.ORGANIZATION_CODE
, T1.ORGANIZATION_DESC
, T1.ACCOUNT_POOL
, T1.ACCOUNT_POOL_DESC
, T1.ACCOUNT
, T1.ACCOUNT_DESC
```

[Learn more about native database queries](#)