Office of Financial Planning and Budget

Unit Resource Request

(formerly called Spring Budget Planning (SBP))

Planning Analytics Application
Training Overview

- Unit Resource Request (URR) Introduction
- Creating Allocation Request
- Reviewing Allocation Requests
- Editing Allocation Requests
Unit Resource Request - Introduction

- Planning Analytics application that –
  - Replaces static and labor intensive Excel submissions
  - Automates and streamlines request process for budget allocations
  - Improves communication between MAUs and OFPB
  - Enables OFPB to provide additional reporting per MAUs requests over time
  - User friendly interface and functionality

- MAU fiscal officers already established within the application
- Dean/VP roles available upon request
- Contact budget@msu.edu to access the application
Unit Resource Request – Create Allocation

- Create Allocation Tab has two Sub-Tabs -
  - Main Menu – Select single or multi year allocation
  - Request Details – Complete allocation request details
Unit Resource Request – Create Allocation

Request Details – Create New Request

- Provide Additional Details.
- No character limit.
- Copy & paste works.
- Cannot attach documents in application
- Reference additional documents in comments section and email them to budget@msu.edu

- Request ID assigned automatically
- Required Fields
- Spread Method by default is Manual
Unit Resource Request – Create Allocation

Non-Recurring Allocation Request Illustration

- Select Start and End Year to be the same – 2020-2021
- Select “Create Allocation”
Unit Resource Request – Create Allocation

- Complete all “Required” fields
- Make sure all requests are assigned Priority Ranking between 1 and 20
- Review data for completeness and accuracy

Provide Additional Details. Double click in the box to edit text.

Notice “Green Font” in filled out sections

Spread Method by default is Manual
Unit Resource Request – Create Allocation

1. Select Commit

Notice “Green Font” turns to “Black Font”

2. Select Finished

Please note that each Allocation Request entry needs to be committed before selecting "Finished" on both - Create Allocation and Edit Allocation tabs.
Unit Resource Request – Create Allocation

- If there is an error in submission, contact budget@msu.edu

- If submission is successful, this message box appears.
  - Select “OK”
Unit Resource Request – Create Allocation

Recurring Allocation Request Illustration

- Select Start and End Year to include multiple years
- Select “Create Allocation”
Unit Resource Request – Create Allocation

- Complete all “Required” fields
- Make sure all requests are assigned Priority Ranking between 1 and 20
- Review data for completeness and accuracy
When Same Value is selected for the Spread Method, make sure to select Calculate.
Selecting Finished before selecting Calculate will result in Requested Amounts for subsequent years to be blank. Finished will still show Successful message.
Unit Resource Request – Create Allocation

1. Select Commit

Notice “Blue Font” turns to “Black Font”

2. Select Finished

Please note that each Allocation Request entry needs to be committed before selecting "Finished" on both - Create Allocation and Edit Allocation tabs.
Unit Resource Request – Create Allocation

- If there is an error in submission, contact budget@msu.edu

If submission is successful, this message box appears.
Select “OK”
Unit Resource Request – All Requests

Summary of all Allocation Requests ordered by Priority Index

- Table View by Year and Recurring / Non-Recurring
- This Tab does not accept Edits / Changes
- Data updated hourly
- Contact budget@msu.edu if update is needed sooner

To delete / remove an allocation request, zero out the $ amounts, change the Priority Ranking to last (20 if possible) and email budget@msu.edu with the Request ID.
Unit Resource Request – Edit Allocation

Non-Recurring Allocation Request Illustration – **Edit Priority Ranking**

1. Select Non-Recurring Allocation Request ID - Title
2. Change Priority Ranking from 1 to 4
3. Select Commit
4. Select Finished

*Be sure to COMMIT your data before clicking Finished.*

Connection to campus strategic priorities? (Optional Planning except, if relevant)

Explain whether the request for allocation has any relevance or connection to campus initiatives / priorities

Additional Comments for Consideration

Any additional comments

Requested Amount: **150,000**
Unit Resource Request – Edit Allocation

Recurring Allocation Request Illustration – Edit $ Request Amount

1. Select Recurring Allocation Request ID - Title
2. Change Requested Amount from $120,000 to $115,000
3. Select Calculate
4. Select Commit
5. Select Finished

* Be sure to COMMIT your data before clicking Finished.
### Unit Resource Request – All Requests

#### Reviewing Edited Data for Allocation Request Illustrations

<table>
<thead>
<tr>
<th>Priority Index</th>
<th>Spring Budget Request Allocation</th>
<th>Starting Year</th>
<th>Ending Year</th>
<th>Requested Amount</th>
<th>(Non) Recurring</th>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>VM20200003 - Animal Research</td>
<td>2020-21</td>
<td>2020-21</td>
<td>150,000</td>
<td>Recurring</td>
<td>Animal Research</td>
<td>Explain whether the request for allocation is justified. Any additional comments should be included.</td>
</tr>
<tr>
<td>8</td>
<td>VM20200004 - Professor Funding</td>
<td>2020-21</td>
<td>2022-23</td>
<td>115,000</td>
<td>Recurring</td>
<td>Professor Funding</td>
<td>Explain whether the request for allocation is justified. Any additional comments should be included.</td>
</tr>
</tbody>
</table>

**Summary last updated 15:42 on 2023-05-07**

- **Recurring Allocation** - Requested Amount changed from $120,000 to $115,000
- **Non-Recurring Allocation** - Priority Ranking changed from 1 to 4
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