Office of Planning and Budgets
Budget Planning and Analysis

Spring Budget Planning
Planning Analytics Application
Training Overview

- Spring Budget Planning Introduction
- Creating Allocation Request
- Reviewing Allocation Requests
- Editing Allocation Requests
Spring Budget Planning - Introduction

- New Planning Analytics application that –
  - Replaces static and labor intensive Excel submissions
  - Automates and streamlines request process for budget allocations
  - Improves communication between MAUs and OPB
  - Enables OPB 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 Bill Buddle in OPB to access the application, remediations available overnight
Spring Budget Planning – Create Allocation

- SBP – Create Allocation Tab has two Sub-Tabs -
  - Main Menu – Select single or multi year allocation
  - Request Details – Complete allocation request details
Spring Budget Planning – Create Allocation

Request Details – Create New Request

- Request ID assigned automatically
- Required Fields
  - Title
  - (Non) Recurring
  - Priority Ranking
  - Internal Match Funding
  - Partnering Unit Commitments
  - Tied to A&I or TLE
  - Spread Method
  - Requested Amount

- Spread Method by default is Manual
- Cannot attach documents in SBP application
- Reference additional documents in comments section and email them to Charmaine Shellman in OPB

- Provide Additional Details.
- No character limit.
- Copy & paste works.
Spring Budget Planning – Create Allocation

Non-Recurring Allocation Request Illustration

- Select Start and End Year to be the same – 2020-2021
- Select “Create Allocation”
Spring Budget Planning – Create Allocation

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

Spread Method by default is Manual

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

Notice “Green Font” in filled out sections
Spring Budget Planning – 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.
Spring Budget Planning – Create Allocation

- If submission is successful, this message box appears.
- Select “OK”

- If there is an error in submission, contact Bill Buddle in OBP
Spring Budget Planning – Create Allocation

Recurring Allocation Request Illustration

- Select Start and End Year to include multiple years
- Select “Create Allocation”
Spring Budget Planning – Create Allocation

- Complete all “Required” fields
- Make sure all requests are assigned Priority Ranking between 1 and 20
- Review data for completeness and accuracy
Spring Budget Planning – Create Allocation

- 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.
Spring Budget Planning – Create Allocation

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

- If there is an error in submission, contact Bill Buddle in OBP.
- If submission is successful, this message box appears.
  - Select “OK”
### Spring Budget Planning – All Requests

#### Summary of all Allocation Requests ordered by Priority Index

<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>1</td>
<td>VM20220008 - Animal Research</td>
<td>2020-21</td>
<td>2020-21</td>
<td>$150,000</td>
<td>Non-Recurring</td>
<td>Animal Research</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>VM20220009 - Professor Funding</td>
<td>2020-21</td>
<td>2022-23</td>
<td>$120,000</td>
<td>Recurring</td>
<td>Professor Funding</td>
<td></td>
</tr>
</tbody>
</table>

- Table View by Year and Recurring / Non-Recurring
- This Tab does not accept Edits / Changes
- Data updated hourly
- Contact Bill Buddle in OPB if data update is needed sooner

Click this button to refresh data in the Table.

<table>
<thead>
<tr>
<th>MAU: 10046000-COLL VET MEDICINE</th>
<th>Fiscal Year: 2020-21</th>
</tr>
</thead>
</table>

Summary last updated 14:24 on 2020-06-07

To delete / remove an allocation request, zero out the $ amounts, change the Priority Ranking to last (20 if possible) and email Bill Buddle in OPB with the Request ID.
Spring Budget Planning – 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.*
Spring Budget Planning – 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
### Spring Budget Planning – 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>VM 20200003 - 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...</td>
</tr>
<tr>
<td>8</td>
<td>VM 20200004 - Professor Funding</td>
<td>2020-21</td>
<td>2022-23</td>
<td>120,000</td>
<td>Recurring</td>
<td>Professor Funding</td>
<td>Explain whether the request for allocation is justified. Any additional comments...</td>
</tr>
</tbody>
</table>

- **Recurring Allocation** - Requested Amount changed from $120,000 to $115,000.
- **Non-Recurring Allocation** - Priority Ranking changed from 1 to 4.
Office of Planning and Budgets
Budget Planning and Analysis

Spring Budget Planning
Planning Analytics Application