ALL FUNDS BUDGET SUBMISSION PROCESS
This guide will cover how to submit all funds budget.

In UF Budget Planner, the college level budget officers are required to submit budgets through the All Funds Budget Submission process. Department level budget officers are not required to submit. It’s the college’s decision whether you require your departments to submit their budget through this process. The college level budget officers can submit the budget for the whole college.

ACCESSING PROCESS
To access the Process, first click the W button.

In the Navigation Menu, click Processes and then Overview.

The overview page provides an overall view of the process task for both administrators and assignees. Tasks are grouped by Tasks Running Late, Tasks in Progress and Tasks Completed. Tasks are sorted based on task assignments and due dates.
Select **All Funds Budget Submission** from the **Process** drop down menu.

Five tasks will populate in the **Tasks in Progress** section of the page. Once units finish their input in all the sheets, they can start to run these tasks.

Click **More**, you can then drill down to see more information.
Task Status shows who has completed the task and who has not.

You can also add attachments and notes.
To access the tasks, you can click **Go to Process Guide**...

Or you can click the **W** button, then click **Processes** followed by **All Funds Budget Submission**.

This menu will appear:
There are five tasks visible, with the first selected by default. You can work on the first four tasks in any order and complete the fifth task the last.

The first four tasks require the units to run reports to review and validate the data entered in the sheets. The different reports will populate when different tasks are selected. For example, if you select task 1: Review Control vs Budgeted Variance by Fund, the report panel will appear to the right of the task menu.

Once the report is run and the variance is zero, check the box in front of the task.

If you navigate back to the Process Overview page, task 1 will now appear in the Tasks Completed section. Refresh the page if you do not see the update.
After the first four tasks are completed and the data is validated, the units will go to the last task to submit their budget. Back on the All Funds Budget Submission page, if task 5 is selected, the screen below will appear. This submission is done at the college level. Click the **Submit** button.

The message below will appear. Click **Yes**.

The status at the college level now shows Submitted. The department level shows Approved and Locked. Once locked, users cannot make any changes to the sheets.
If a user navigates to a locked sheet, they will see the sheet is grayed out and cannot make any changes.

If you need to update the sheet and make further changes after the submission, you have three options:

Option 1: The department users can recall their own submissions. (This is applicable to the colleges that require the departments to submit their budgets)

After recall, they need to reject every single department to unlock the sheets.
Once rejected, the sheets are unlocked.

Option 2: The college budget officers can only recall their own submissions at college level.

After recall, they can reject all the levels at the same time.
However, the college budget officers can neither recall the department users’ submission nor recall the submission they did at department level. For example, when the department user submits the budget for 1701 or the budget officer submits a budget for 1701, the college budget officers only have two options – Approve or Reject.

Option 3: The central budget office can reject the submission. After rejection, the sheets are unlocked, and the user can make the changes.

Once the budget is submitted, the budget office will get an email notification. The budget from your unit will be under review.
The process overview page will also be updated. All the tasks will appear in the Tasks Completed section for department level users. For the parent level users, the tasks will not move to the Tasks Completed section until all the users complete all tasks.

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For additional Assistance

**Technical Issues**
The UF Computing Help Desk  
352-392-HELP  
helpdesk.ufl.edu

**Policies and Directives**
The University Budget Office  
352-392-2402  
University Budget Office