

ALL FUNDS BUDGET SUBMISSION PROCESS

This guide will cover how to submit all funds budget.

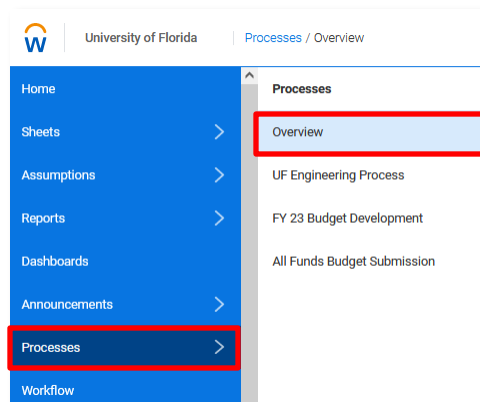
In UF Budget Planner, the college level budget officers are required to submit budgets through the All Funds Budget Submission process. Department level budget officers are not required to submit. It's the college's decision whether you require your departments to submit their budget through this process.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

ACCESSING PROCESS

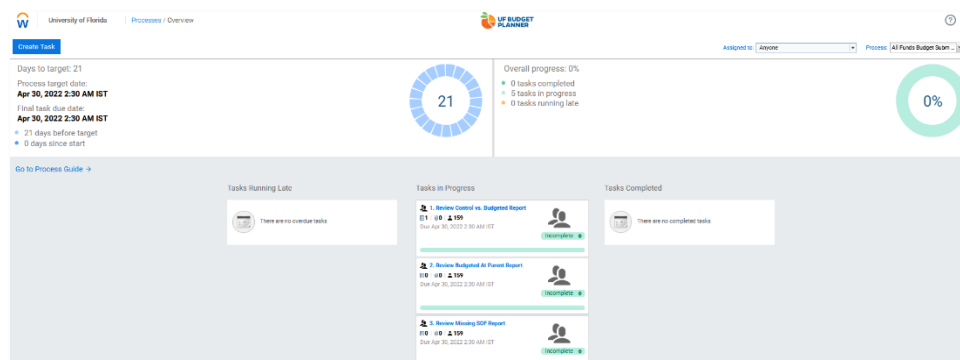
To access the Process, first click the **W** button.



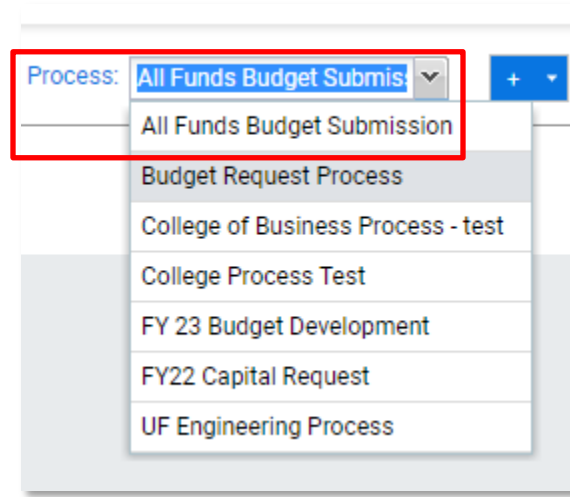
In the Navigation Menu, click **Processes** and then **Overview**.



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.



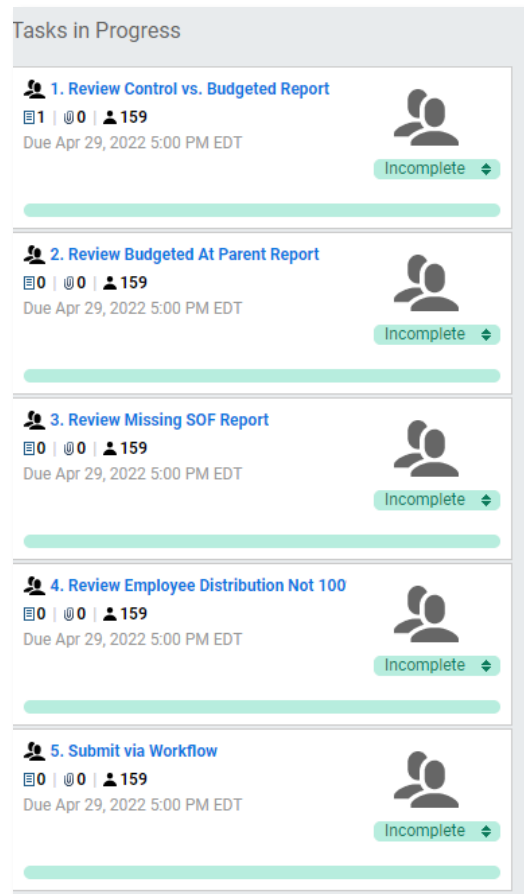
Select **All Funds Budget Submission** from the **Process** drop down menu.



Process: All Funds Budget Submis

- All Funds Budget Submission
- Budget Request Process
- College of Business Process - test
- College Process Test
- FY 23 Budget Development
- FY22 Capital Request
- UF Engineering Process



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.






Tasks in Progress




- 1. Review Control vs. Budgeted Report**
Due Apr 29, 2022 5:00 PM EDT
Incomplete
- 2. Review Budgeted At Parent Report**
Due Apr 29, 2022 5:00 PM EDT
Incomplete
- 3. Review Missing SOF Report**
Due Apr 29, 2022 5:00 PM EDT
Incomplete
- 4. Review Employee Distribution Not 100**
Due Apr 29, 2022 5:00 PM EDT
Incomplete
- 5. Submit via Workflow**
Due Apr 29, 2022 5:00 PM EDT
Incomplete


Click **More**, you can then drill down to see more information

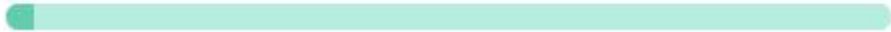

1. Review Control vs. Budgeted Report


 1
  0
  163

Due Apr 29, 2022 5:00 PM EDT



 More
  Edit
  Clone




Incomplete 



Task Status shows who has completed the task and who has not.


Tasks in Progress



1. Review Control vs. Budgeted Report


 1
  0
  159

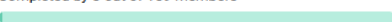
Due Apr 29, 2022 5:00 PM EDT


by 01. Level Owners

Incomplete 



Task Status (1%)

Completed by 3 out of 159 members




Completed by (3)



Alli Gator
 Holly Wood
 Jack Pott





Not completed by (156)

Amanda Lynn
 Arty Fischel
 Dinah Mite
 Don Keigh
 Kay Oss

You can also add attachments and notes.


Tasks in Progress



1. Review Control vs. Budgeted Report



 1
  0
  163


Due Apr 29, 2022 5:00 PM EDT


by 01. Level Owners

Incomplete 


Task Status (4%)


Description

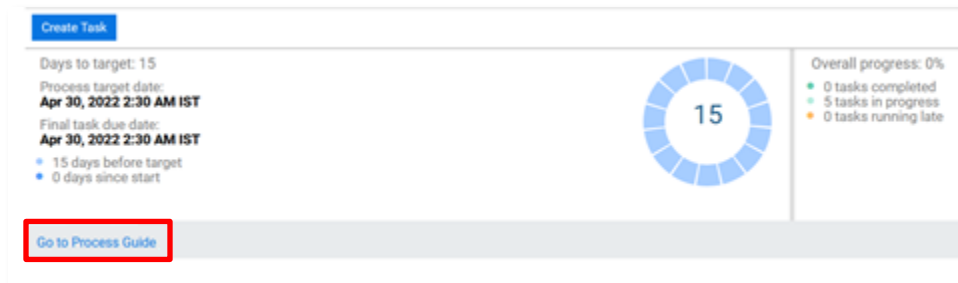

Attachments (0)


Notes (1)

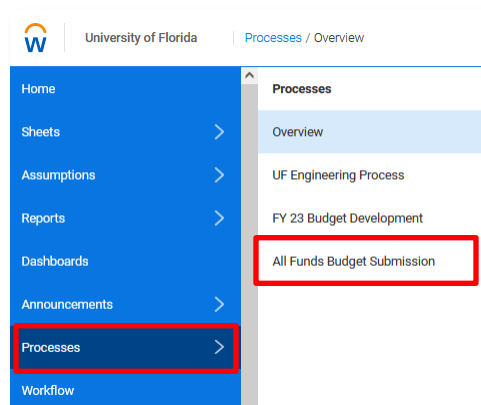
Training and Organizational Development
UF Human Resources

4/7/2022
Page 3 of 10

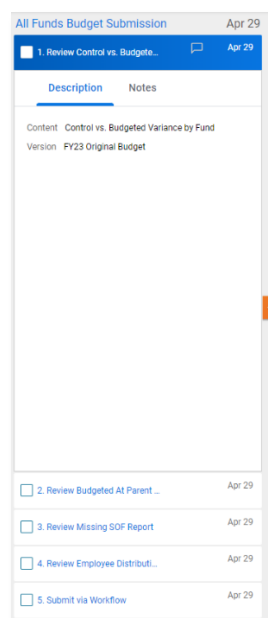
To access the tasks, you can click **Go to Process Guide...**



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

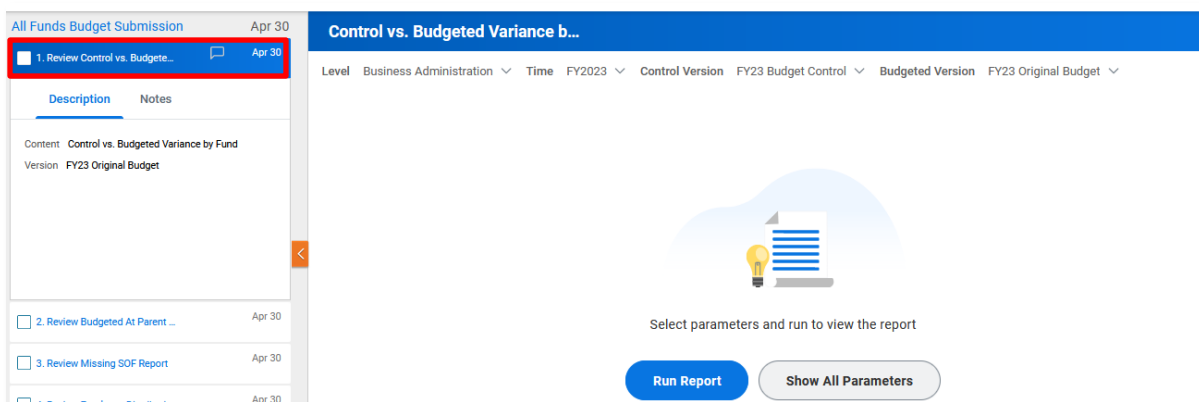


This menu will appear:

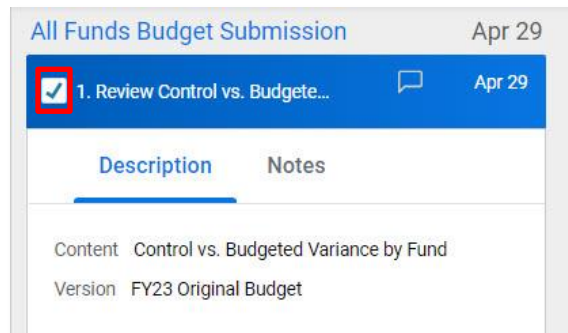


There are five tasks visible, with the first selected by default. You can work on the first four tasks in any order and complete the fifth task the last.

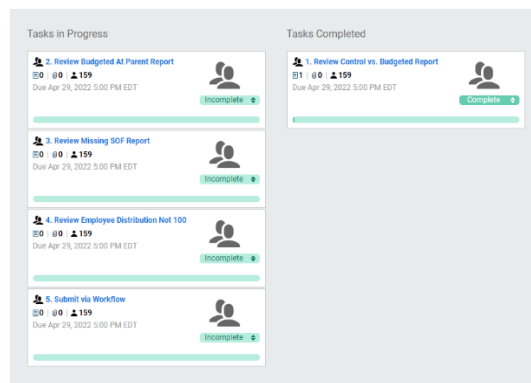
The first four tasks require the units to run reports to review and validate the data entered in the sheets. The different reports will populate when different tasks are selected. For example, if you select task **1: Review Control vs Budgeted Variance by Fund**, the report panel will appear to the right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



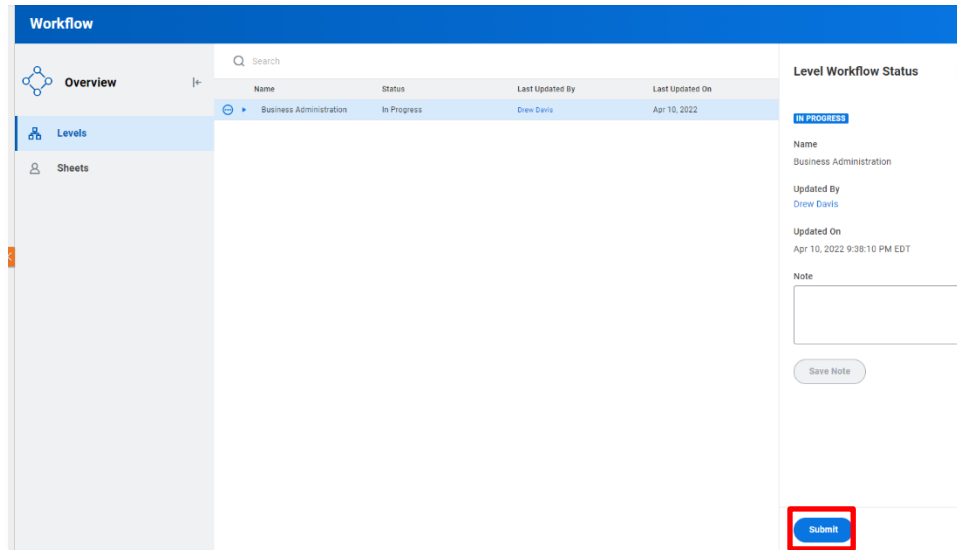
Once the report is run and the variance is zero, check the **box** in front of the task.



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.

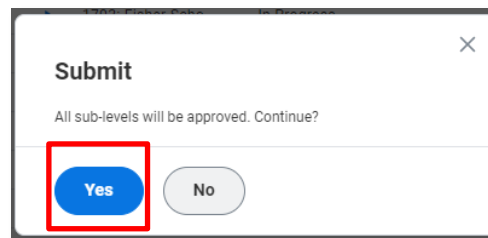


After the first four tasks are completed and the data is validated, the units will go to the last task to submit their budget. Back on the All Funds Budget Submission page, if task 5 is selected, the screen below will appear. This submission is done at the college level. Click the **Submit** button.



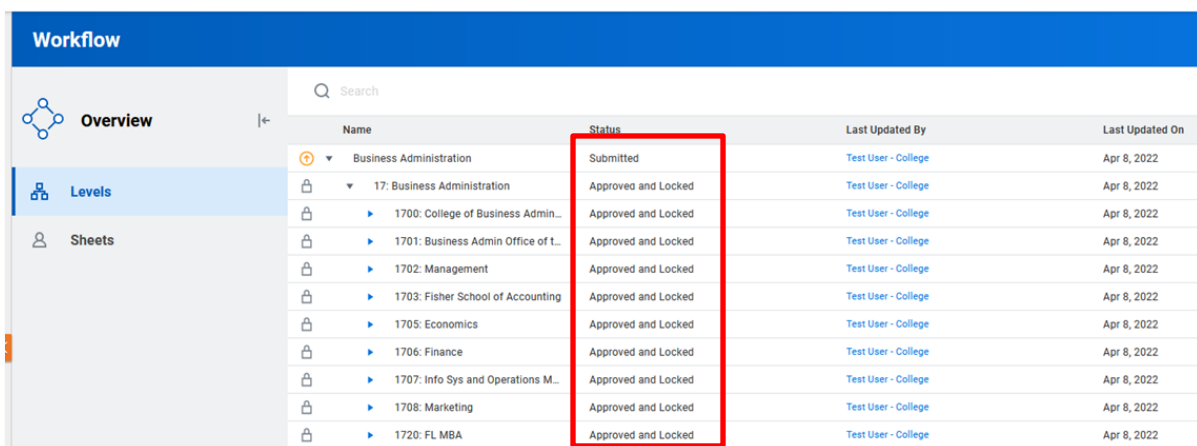
The screenshot shows the 'Workflow' interface with a sidebar containing 'Overview', 'Levels', and 'Sheets'. The main area displays a table with columns: Name, Status, Last Updated By, and Last Updated On. The first row shows 'Business Administration' with a status of 'In Progress', updated by 'Drew Davis' on 'Apr 10, 2022'. On the right, a 'Level Workflow Status' panel shows details for 'Business Administration', including the update date and time. A red box highlights the 'Submit' button at the bottom right of the main table area.

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



The dialog box titled 'Submit' contains the text 'All sub-levels will be approved. Continue?'. At the bottom, there are two buttons: 'Yes' (highlighted with a red box) and 'No'.

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.



The screenshot shows the 'Workflow' interface with a sidebar containing 'Overview', 'Levels', and 'Sheets'. The main area displays a table with columns: Name, Status, Last Updated By, and Last Updated On. The first row shows 'Business Administration' with a status of 'Submitted', updated by 'Test User - College' on 'Apr 8, 2022'. Below it, a list of sub-levels is shown, each with a status of 'Approved and Locked', updated by 'Test User - College' on 'Apr 8, 2022'. A red box highlights the 'Submitted' status for the college level and the 'Approved and Locked' status for the department levels.

Name	Status	Last Updated By	Last Updated On
Business Administration	Submitted	Test User - College	Apr 8, 2022
17: Business Administration	Approved and Locked	Test User - College	Apr 8, 2022
1700: College of Business Admin...	Approved and Locked	Test User - College	Apr 8, 2022
1701: Business Admin Office of t...	Approved and Locked	Test User - College	Apr 8, 2022
1702: Management	Approved and Locked	Test User - College	Apr 8, 2022
1703: Fisher School of Accounting	Approved and Locked	Test User - College	Apr 8, 2022
1705: Economics	Approved and Locked	Test User - College	Apr 8, 2022
1706: Finance	Approved and Locked	Test User - College	Apr 8, 2022
1707: Info Sys and Operations M...	Approved and Locked	Test User - College	Apr 8, 2022
1708: Marketing	Approved and Locked	Test User - College	Apr 8, 2022
1720: FL MBA	Approved and Locked	Test User - College	Apr 8, 2022

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)

Name	Status	Last Updated By	Last Updated On
1701: Business Admin Office ...	Submitted	Test User - Department	Apr 14, 2022
17010000: BA-OFFICE O...	Approved and Locked	Test User - Department	Apr 14, 2022
17010100: BA-DEAN BUS...	Approved and Locked	Test User - Department	Apr 14, 2022
17010200: BA-MIB PROG...	Approved and Locked	Test User - Department	Apr 14, 2022
17010300: BA-MSM PRO...	Approved and Locked	Test User - Department	Apr 14, 2022
17010400: BA-DEVELOP...	Approved and Locked	Test User - Department	Apr 14, 2022
17010500: BA-BUSINESS...	Approved and Locked	Test User - Department	Apr 14, 2022
17010501: BA-BUS COM...	Approved and Locked	Test User - Department	Apr 14, 2022
17010502: BA-CTR FOR ...	Approved and Locked	Test User - Department	Apr 14, 2022
17010600: BA-COURSE T...	Approved and Locked	Test User - Department	Apr 14, 2022
17010700: BA-POST DOC...	Approved and Locked	Test User - Department	Apr 14, 2022

After recall, they need to **reject** every single department to unlock the sheets.

Name	Status	Last Updated By	Last Updated On
1701: Business Admin Office ...	In Progress	Test User - Department	Apr 14, 2022
17010000: BA-OFFICE O...	Approved	Test User - Department	Apr 14, 2022
17010100: BA-DEAN BUS...	Approved	Test User - Department	Apr 14, 2022
17010200: BA-MIB PROG...	Approved	Test User - Department	Apr 14, 2022
17010300: BA-MSM PRO...	Approved	Test User - Department	Apr 14, 2022
17010400: BA-DEVELOP...	Approved	Test User - Department	Apr 14, 2022
17010500: BA-BUSINESS...	Approved	Test User - Department	Apr 14, 2022
17010501: BA-BUS COM...	Approved	Test User - Department	Apr 14, 2022
17010502: BA-CTR FOR ...	Approved	Test User - Department	Apr 14, 2022
17010600: BA-COURSE T...	Approved	Test User - Department	Apr 14, 2022
17010700: BA-POST DOC...	Approved	Test User - Department	Apr 14, 2022

Name	Status	Last Updated By	Last Updated On
1701: Business Admin Office of the Dean	In Progress	Test User - Department	Apr 14, 2022
17010000: BA-OFFICE OF THE DEAN	Rejected	Test User - Department	Apr 14, 2022
17010100: BA-DEAN BUSINESS OFFICE	Rejected	Test User - Department	Apr 14, 2022
17010200: BA-MIB PROGRAM	Rejected	Test User - Department	Apr 14, 2022

Once rejected, the sheets are unlocked.

Levels 17010100: BA-DEAN BUSINESS OFFICE									
#	FUNDS *	ACCOU...	PROGR...	DEPT FL...	SOURCE OF FUN...	BUDGET REFEREN...	PROJECT	BUSINESS UN...	NOTES
1	143 AUX - DOCE FUND	411200 - F...	8100 - HE...			CRNT		UFLOR	120,000
2	171 TFRS FR COMPONENTS	430000 - ...	1100 - GE...			CRNT		UFLOR	120,000
3	171 TFRS FR COMPONENTS	571800 - T...	1100 - GE...			CRNT		UFLOR	120,000
4	211 C&G - RETURNED OVERHEAD	571800 - T...	2200 - IND...			CRNT		UFLOR	120,000
5	251 FIN AID RESTD - FED, ST, PRIV	571700 - T...	9800 - AC...			CRNT		UFLOR	120,000
6	143 AUX - DOCE FUND	411200 - F...	8100 - HE...		OTHER	CRNT		UFLOR	
7	171 TFRS FR COMPONENTS	430000 - ...	1100 - GE...		UF Foundation	CRNT		UFLOR	
8	171 TFRS FR COMPONENTS	571800 - T...	1100 - GE...		UF Foundation	CRNT		UFLOR	

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

Name	Status	Last Updated By	Last Updated On
Business Administration	Submitted	Test User - College	Apr 12, 2022
17: Business Administr...	Approved and Locked	Test User - College	Apr 12, 2022
1700: College of B...	Approved and Locked	Test User - College	Apr 12, 2022
1701: Business Ad...	Approved and Locked	Test User - College	Apr 12, 2022
1702: Management	Approved and Locked	Test User - College	Apr 12, 2022
1703: Fisher Scho...	Approved and Locked	Test User - College	Apr 12, 2022
1705: Economics	Approved and Locked	Test User - College	Apr 12, 2022
1706: Finance	Approved and Locked	Test User - College	Apr 12, 2022
1707: Info Sys and...	Approved and Locked	Test User - College	Apr 12, 2022
1708: Marketing	Approved and Locked	Test User - College	Apr 12, 2022
1720: FL MBA	Approved and Locked	Test User - College	Apr 12, 2022
1721: IT Support P...	Approved and Locked	Test User - College	Apr 12, 2022
1722: Undergradu...	Approved and Locked	Test User - College	Apr 12, 2022

Level Workflow Status

SUBMITTED

Name
Business Administration

Updated By
Test User - College

Updated On
Apr 12, 2022 1:10:17 PM EDT

Note

Save Note

Recall

After recall, they can **reject** all the levels at the same time.

Business Administration	In Progress	Test User - College	Apr 14, 2022
17: Business Administr...	Approved	Test User - College	Apr 14, 2022
1700: College of Bus...	Approved and Locked	Test User - College	Apr 14, 2022
1701: Business Adm...	Approved and Locked	Test User - College	Apr 14, 2022
1702: Management	Approved and Locked	Test User - College	Apr 14, 2022
1703: Fisher School ...	Approved and Locked	Test User - College	Apr 14, 2022
1705: Economics	Approved and Locked	Test User - College	Apr 14, 2022
1706: Finance	Approved and Locked	Test User - College	Apr 14, 2022
1707: Info Sys and O...	Approved and Locked	Test User - College	Apr 14, 2022
1708: Marketing	Approved and Locked	Test User - College	Apr 14, 2022
1720: FL MBA	Approved and Locked	Test User - College	Apr 14, 2022

APPROVED

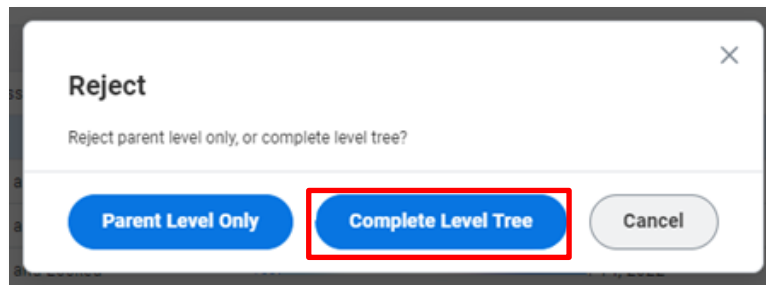
Name
17: Business Administration

Updated By
Test User - College

Updated On
Apr 14, 2022 8:24:54 PM EDT

Note

Reject



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.

Search					Level Workflow Status
Name	Status	Last Updated By	Last Updated On		
Business Administration	In Progress	Test User - College	Apr 14, 2022		SUBMITTED
17: Business Administrat...	In Progress	Mian Wei	Apr 14, 2022		Name
1700: College of Bus...	In Progress	Mian Wei	Apr 14, 2022		1701: Business Admin Office of the Dean
1701: Business Adm...	Submitted	Test User - Department	Apr 14, 2022		Updated By
17010000: BA-O...	Approved and Locked	Test User - Department	Apr 14, 2022		Test User - Department
17010100: BA-D...	Approved and Locked	Test User - Department	Apr 14, 2022		Updated On
17010200: BA-M...	Approved and Locked	Test User - Department	Apr 14, 2022		Apr 14, 2022 8:33:47 PM EDT
17010300: BA-M...	Approved and Locked	Test User - Department	Apr 14, 2022		Approve Reject
17010400: BA-D...	Approved and Locked	Test User - Department	Apr 14, 2022		
17010500: BA-B...	Approved and Locked	Test User - Department	Apr 14, 2022		
17010501: BA-B...	Approved and Locked	Test User - Department	Apr 14, 2022		

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

Search					Level Workflow Status
Name	Status	Last Updated By	Last Updated On		
Total UF	In Progress	Drew Davis	Apr 11, 2022		REJECTED
BEBR	In Progress	Julie Wang	Mar 31, 2022		Name
BUS & ECO Developm...	In Progress	Julie Wang	Mar 31, 2022		Business Administration
Business Administrati...	Rejected	Mian Wei	Apr 12, 2022		Updated By
17: Business Adm...	Rejected	Mian Wei	Apr 12, 2022		Mian Wei
CATTLE Enhancement...	In Progress	Julie Wang	Mar 31, 2022		

Once the budget is submitted, the budget office will get an email notification. The budget from your unit will be under review.

Workflow: "Business Administration" submitted




no-reply@adaptiveinsights.com

To


Retention Policy Inbox UF (3 years)

Expires

 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.


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.


Tasks in Progress



There are no tasks in progress


Tasks Completed



1. Review Control vs. Budgeted Report





@ 0
159

Due Apr 29, 2022 5:00 PM EDT








2. Review Budgeted At Parent Report





@ 0
159

Due Apr 29, 2022 5:00 PM EDT








3. Review Missing SOF Report





@ 0
159

Due Apr 29, 2022 5:00 PM EDT








4. Review Employee Distribution Not 100





@ 0
159

Due Apr 29, 2022 5:00 PM EDT








5. Submit via Workflow



@ 0
159

Due Apr 29, 2022 5:00 PM EDT





For additional Assistance

Technical Issues

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

Policies and Directives

University Budget Office
352-392-2402
University Budget Office