

## Operational Budget Request Process

This guide will cover how to request operational budget.

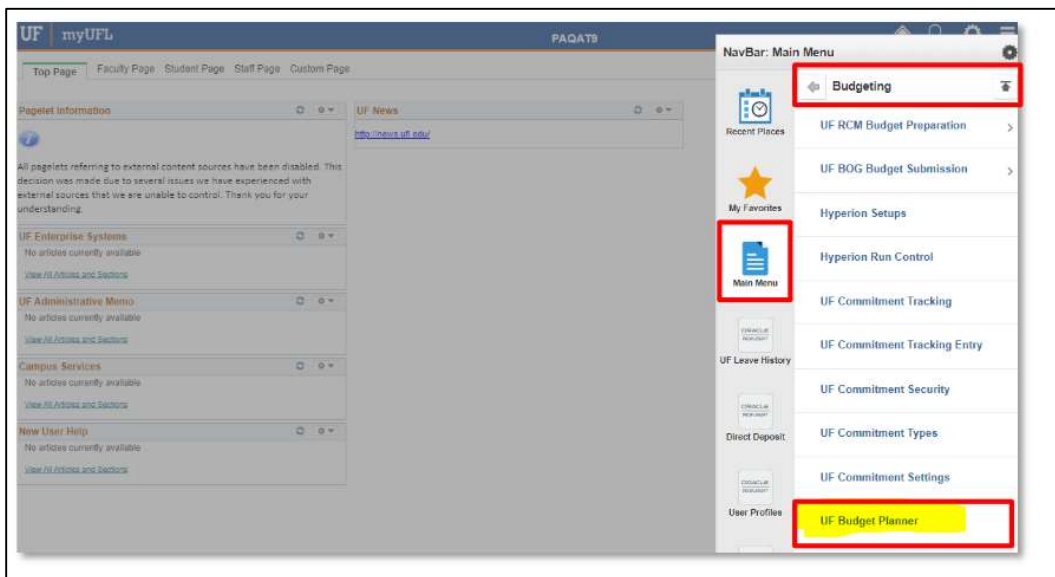
There are important milestones throughout the budgeting process you should be aware of depending on whether you are budgeting for a support unit (SU), academic unit, centers & institutions, or other responsibility center.

Around November timeframe each year, Support units make their operational budget requests for the upcoming fiscal year to the University Budget Office. Effective November 2023, state funded centers & institutions are included in the process as well. The submitted requests are reviewed and approved by the President and Senior Vice Presidents.

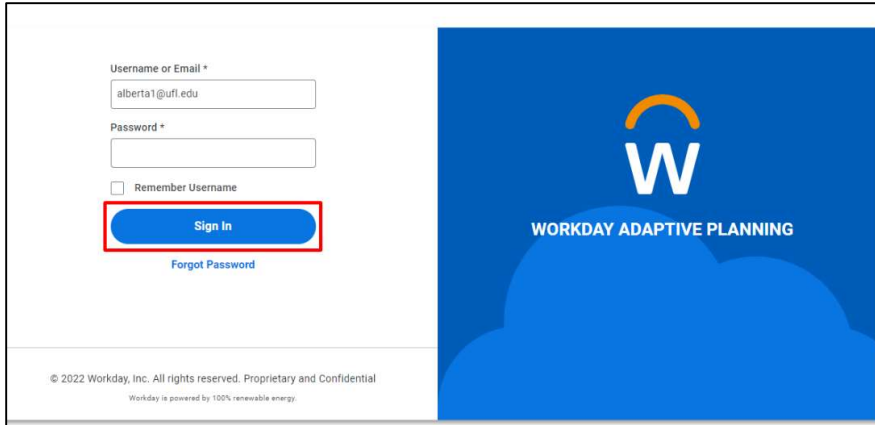
The operational budget request process is conducted in UF Budget Planner. Support Units and State funded Centers & Institutions will receive email notification and detail instruction when the system is open.

### Logging In

1. Go to [myufl.edu](http://myufl.edu). Navigate to **Main Menu > Budgeting > UF Budget Planner**



2. To login, enter your Gatorlink username with @ufl.edu after it and leave the password field blank. Then click the **Sign In** button.



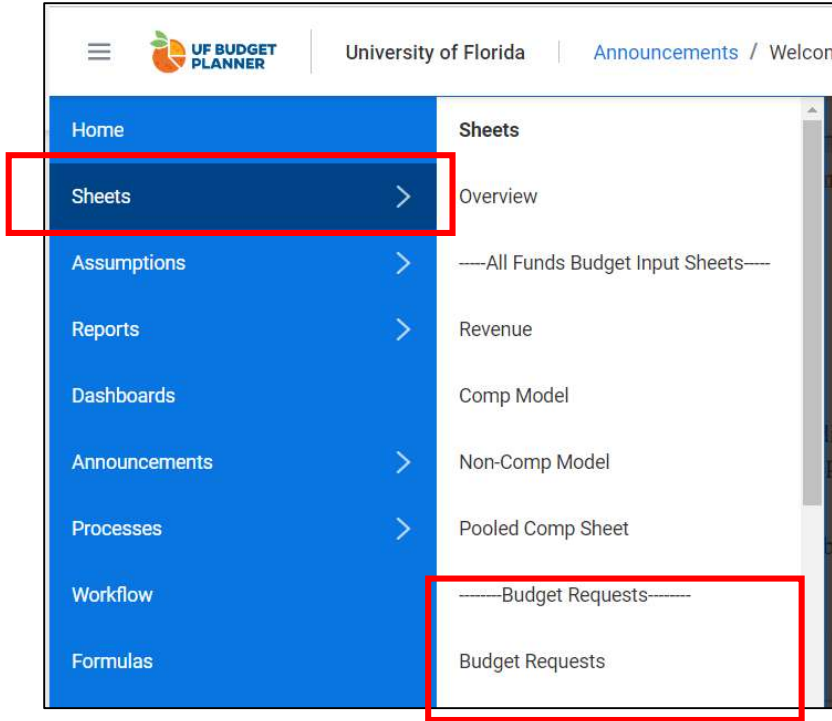
Please note: If you do not the UF Budget Planner link in myufl, please make sure to take the UF\_UBP100\_OLT UF Budget Planner Training course and request the UF\_N\_UBP\_COLLEGE or UF\_N\_UBP\_DEPT security role.

## Accessing A Sheet

1. Click the Global Navigation button on the upper left.



2. In the Navigation Menu, click **Sheets** and then scroll to the **Budget Requests** section and click **Budget Requests**

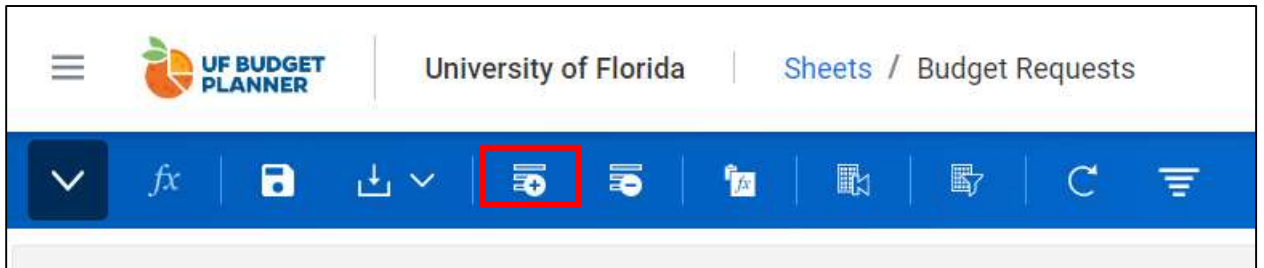


3. On the upper left side, select **FY24 Budget Requests** version or FYXX Budget Requests version (FYXX is the fiscal year you are requesting the budget for), select your level.

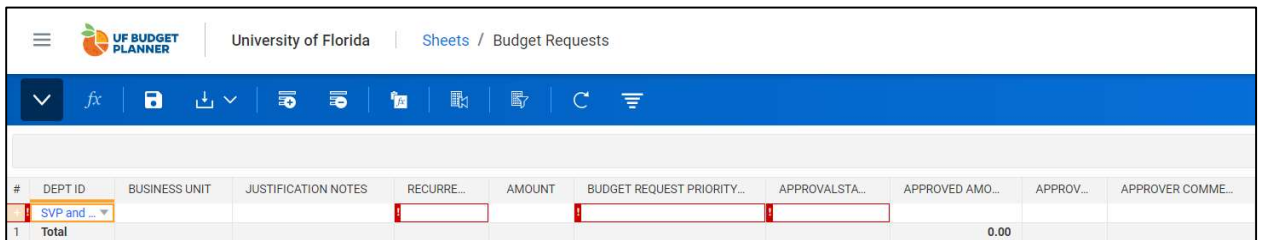


## Enter Requests

1. To add a new request, click + button



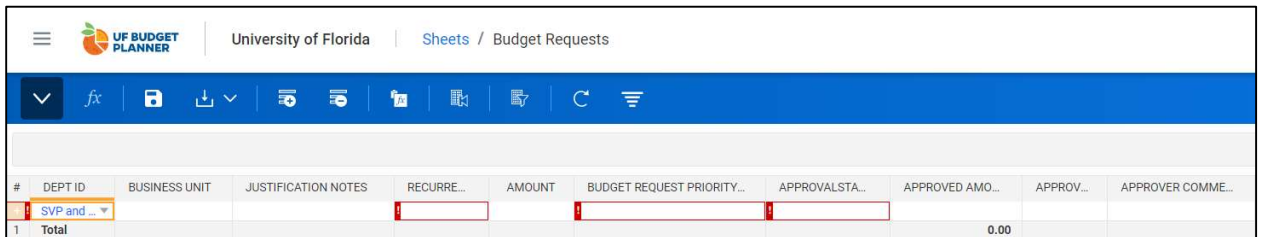
2. A new row is added to the bottom.



The screenshot shows the same interface as the previous one, but with a new row added to the table. The table has the following columns: #, DEPT ID, BUSINESS UNIT, JUSTIFICATION NOTES, RECCURE..., AMOUNT, BUDGET REQUEST PRIORITY..., APPROVALSTA..., APPROVED AMO..., APPROV..., and APPROVER COMME... The new row is highlighted in orange and contains the following data:

#	DEPT ID	BUSINESS UNIT	JUSTIFICATION NOTES	RECCURE...	AMOUNT	BUDGET REQUEST PRIORITY...	APPROVALSTA...	APPROVED AMO...	APPROV...	APPROVER COMME...
1	SVP and ...							0.00		

3. Fill in the DeptID, Business Unit, Justification Notes, Recurrence, Amount, Budget Request Priority fields. Select **Pending** from the Approval Status drop down. Leave Approved Amount, Approver, and Approver Comments fields blank.

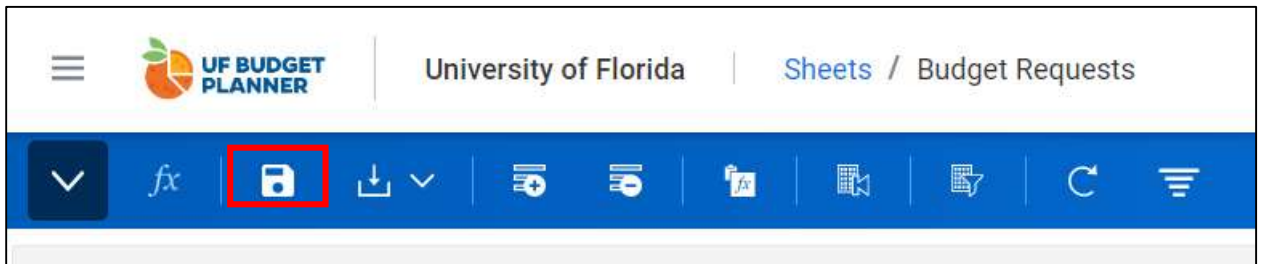


The screenshot shows the same interface as the previous one, but with data entered into the table. The new row is highlighted in orange and contains the following data:

#	DEPT ID	BUSINESS UNIT	JUSTIFICATION NOTES	RECCURE...	AMOUNT	BUDGET REQUEST PRIORITY...	APPROVALSTA...	APPROVED AMO...	APPROV...	APPROVER COMME...
1	SVP and ...							0.00		

Please note: For the Justification Notes field, we recommend less than 2068 characters.

4. Click Save button on the top



- The new line is saved.

#	DEPT ID	BUSI...	JUSTIFICATION NOTES	RECURRENCE *	AMOUNT	BUDGET REQUEST PRIORITY *	APPROVALSTATUS *	FOR BUDGET OFFICE USE ONLY	APPROVED AMOUNT	APPROVER	APPROVER COMMENTS
1	SVP and Chie...	UFLOR	test	Recurring	10,000.00	2	Pending				
2	21020100. C...	UFLOR	Test Line for Example (recommend less than 2058 characters)	Non-Recurring	1.00	1	Pending				
3	Total								0.00		

Please note: For the DEPTID field, you can select roll up levels. Please leave the last three column blank.

- To delete a request, put your cursor to any field in the row, click – button on the top or right click and select Delete Row.

#	DEPT ID	BUSINESS UNIT	JUSTIFICATION NOTES	RECURRENCE...
1	SVP and C...	UFLOR	test	Recurring
2	22010000...	UFLOR	Fund 171 dire	
3	22010000...	UFLOR	Control numb	
4	22020000...	UFLOR	Previously ap	
5	1002: Stra...	UFLOR	Funds for 175	
6	1002: Stra...	UFLOR	Internal Com	
7	1002: Stra...	UFLOR	Analytics Coc	
8	1002: Stra...	UFLOR	Social Media	
9	1002: Stra...	UFLOR	National Med	
10	1002: Stra...	UFLOR	Internal Com	
11	1002: Stra...	UFLOR	Graphic Desig	
12	1002: Stra...	UFLOR	National Med	

- Click Save button.